Correcting a payment in the Patient Payments system

Last modified on 06/09/2025 12:05 pm EDT

If you encounter a payment that has been posted incorrectly, there is a way to correct it without deleting the entire payment. Although it is possible to completely delete a payment, the best practice is to correct the payment instead so that the historical information will remain should there be a need to research the payment in the future.

To correct a payment, please follow the steps below:

1. Navigate to Billing > Patient Payments. Once the patient is selected, press the green + Add button.

F	Patier	nt Pa	iyments	Payments Lin	e Items Logs	Statements	Balance							
			+											
Fr	om		То	Filter by Ran	ge: \$	- \$	Pro	vider: All 👻						
		Simple	e: On Con	densed: On Inte	ernal: Off									C Update
				Total Paid	Allocated Pay	ment (Paid to Appt)	Unalloc	ated Payment	Statement Balance	e	То	tal Balance		
				\$150.00		\$0.00	5	\$150.00	\$750.00			\$600.00		C Auto Fill
Pr	int/Exp	oort 🕶	+ Add	←										
	#		Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Туре	Notes	Amount	Total	
•	0		\$150.00	Mar 30, 2023	Mar 30, 2023			Doctor Doctor	Credit Card	Credit		\$150.00		Generation
Le	gend:	0	Unallocated	 Fully Allocated 	I									

- 2. Select the appointment and under the Type dropdown, select Correction. The amount will populate as a negative value.
- 3. Once all fields are entered, click on the blue **Add** button. The entry will populate as a new line item with a correction under the Type field.

New Cash		×
Payment Date	1	
Appointment		~
Line Item	-No Line Item-	~
Provider		~
Payment Method	- Select Type -	~
Туре	✓ Credit]
Notes	Refund Correction	
Amount	Copay Coinsurance Other	
		Cancel Add

4. If you need to print a receipt for the patient or for record-keeping purposes, we automatically include a note stating that the entry was a correction.

an Jose, CA 95125 15) 844-0011		
ayment Details		
Patient:	Amount Paid:	\$-10.00
Payment Type: Dobit		
Payment Date: June 28th, 2018		
Note: Correction		