Deleting a payment in the Patient Payments system

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If there is an error in a payment posted, best practice is to counter-post a correction that will keep a record of the error and subsequent correction instead of deleting the payment, which will remove all records of it. (How to enter a correction)

If you would like to delete the entries outright, you can delete payments that were entered in error. To do so, you'll need the **Billing Administrator** and **Access Patient Payments** permissions enabled for your login. Only those with Billing Administrator privileges will be able to completely delete payments.

If you are a practice admin, make sure you have these permissions checked off for any Staff Members who will need to delete payments in totality. (How to set Staff Permissions)

dr chrono		👗 Dr. John McNabb, MD	 Dr. John McNabb, MD (
Schedule Clinical Patients Reports Billing	Account Help 🕴 🔀			
Permissions Administration	Permissions for Phil Coulson	×		
Providers Staff Roles Permissions Permis	Show Billing Tab ()			
	Show Billing Summary Ø			
Staff	Add new referring sources 0			
Password Testing	Access Institutional Billing ()			
Phil Coulson	Access All Messages for Practice Group ()			
	Billing Administrator 🤁			
	Access Balance/Ledger ()			
	Access Patient Payments 0			
	Access Patient Statements 0	•		
	Emergency Access 0			
	Close	ave Permissions		

1. With "Billing Administrator" and "Access Patient Payments" enabled, navigate to Billing > Patient Payments



2. Press on the **Payments** tab in the top left corner, then search for the patient you need and press **Update** on the right side of the screen.

Patient Payments	Payments Line Items	Logs Statements Balance	Ð		Feedback
Patient					
From	Filter by Range: \$	- \$	Provider: All -		
Simple: On Con	ndensed: On				C Update
Please select a patient.					
					1 - 10 OF 10
Patient Name	Chart ID	Appointment Bala	Total Payment	Unallocated Payment	Current Patient Responsibility
SAAb AABBB Mr.	AAAA000001	\$26	.00 \$50.00	\$50.00	\$213.00

3. You can then press the Lock Icon on the left side of the screen to enter Unlock Mode. You'll get a pop-up asking Are you sure? to which you can reply OK. This will "unlock" the screen, allowing you to delete the payment.

dr chrono	johnmcnabb.drchrono.com says	Iohn McNabb, MD 👻 Dr	. John McNabb, MD (johnmcnabb) ປໍ					
Schedule Clinical Patients Reports Billing Acco	Are you sure?	Search	5 43 ± 17 +					
Patient Payments Payments Line Items Logs	Cancel	ок	Feedback					
From To Filter by Range: \$ - \$ Provider: All • Simple: On Condensed: On Condensed: On								
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Steve Rogers \$9,625.	.00 \$793.50	\$8,831.50 \$45,848.06	\$38,435.19					
Print/Export - + Add								
# 🖸 Unallocated Posted Date Payment Date App	pointment Line Item Provider	Payment Method Type Notes	Amount Total					
▶ 3 □ \$0.00 Apr 11, 2018 Apr 11, 2018 4/1	1/2018 02:00PM Dr. John McNabb, MD	Cash Credit	\$366.50					

4. Once in unlock mode, you can identify the payment that needs to be deleted, and press the **red X** icon to the right of that payment. The system will ask you to confirm the deletion, and after doing so, the payment will be deleted.

	C	Confirm payment	firm payment deletion, this will delete all moved cash as well!					0						ር
Reports Billing A	ccount							Teach	nMe S	Search			<mark>∠38</mark> Ξ	180 🕂
Patient Payments	Payme			Can	Cel OK		_							
Jason (Demo) Buckley]													
From	Filte	er by Range: \$	- \$		Provider:	All 🔻								
Simple: On	Condensed: Or	n Internal: (Dff										C Up	date
UNLOCK MODE														
	Total Pa	aid Alle	ocated Payment (Paid to	Appt) l	Jnallocated Paym	ent	Stateme	nt Balan	ice	Tota	l Balance	•		
Jason (Demo) Buckley	\$1,102.0	00	\$0.28		\$1,101.72		\$6,6	679.42		\$5	,577.70		2 Auto	o Fill
Print/Export - Add	ł													
# Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Paymen	t Method	Туре	Notes	Amount	Total			
1 1 \$19.72	Nov 14, 2019	Nov 14, 2019	11/14/2019 12:15PM		Dan Guidebeck	Cash		Credit		\$20.00		•	Receipt	•
0 \$1,000.00 \$1,000.00	Jun 13, 2019	Jun 13, 2019	6/10/2019 03:45PM		Dan Guidebeck			Credit		\$1,000.00		•	Delete this	payment
▶ 0 □ \$82.00	Jun 10, 2019	Jun 10, 2019			Dan Guidebeck	Cash		Credit		\$82.00		•	Receipt	•
Legend: - Unallocate	ed 🕒 Fully Al	llocated												