

Month End Close: Patient Payment Screen

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When transactions have been frozen in the account for a certain date, the ability to delete or unallocate a patient payment will not be available. However, any dates that are not within a frozen period, will be able to be updated, changed, or deleted.

1. Navigate to Billing > Patient Payments

The screenshot shows the 'Patient Payments' interface. At the top, there are tabs for 'Payments', 'Line Items', 'Logs', 'Statements', and 'Balance'. Below the tabs, there is a search bar with 'sample sample' and filters for 'From', 'To', 'Filter by Range', and 'Provider: All'. There are also buttons for 'Simple: On', 'Condensed: On', and 'Internal: Off', along with an 'Update' button. A red arrow points to a lock icon in the top left of the payment list area.

UNLOCK MODE

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment	Statement Balance	Total Balance	
sample sample	\$200.00	\$50.00	\$150.00	\$475.00	\$336.50	Auto Fill

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#	Unallocated	Posted Date	Payment Date	Appointment	Line Item	Provider	Payment Method	Type	Notes	Amount	Total	
▶ 0	<input type="checkbox"/>	\$100.00	May 5, 2023	May 5, 2023	5/05/2023 11:23AM		Visa	Credit		\$100.00		Receipt x @
▶ 0	<input type="checkbox"/>	\$50.00	May 5, 2023	May 5, 2023	5/05/2023 11:23AM		Credit Card	Credit		\$50.00		Receipt x @
▶ 1	<input type="checkbox"/>	\$0.00	Apr 14, 2022	Apr 14, 2022	4/14/2022 03:00PM	Dr. D. Brown	Cash	Credit		\$50.00		Receipt x @

More information regarding unlock mode when charges are not frozen can be found [here](#).