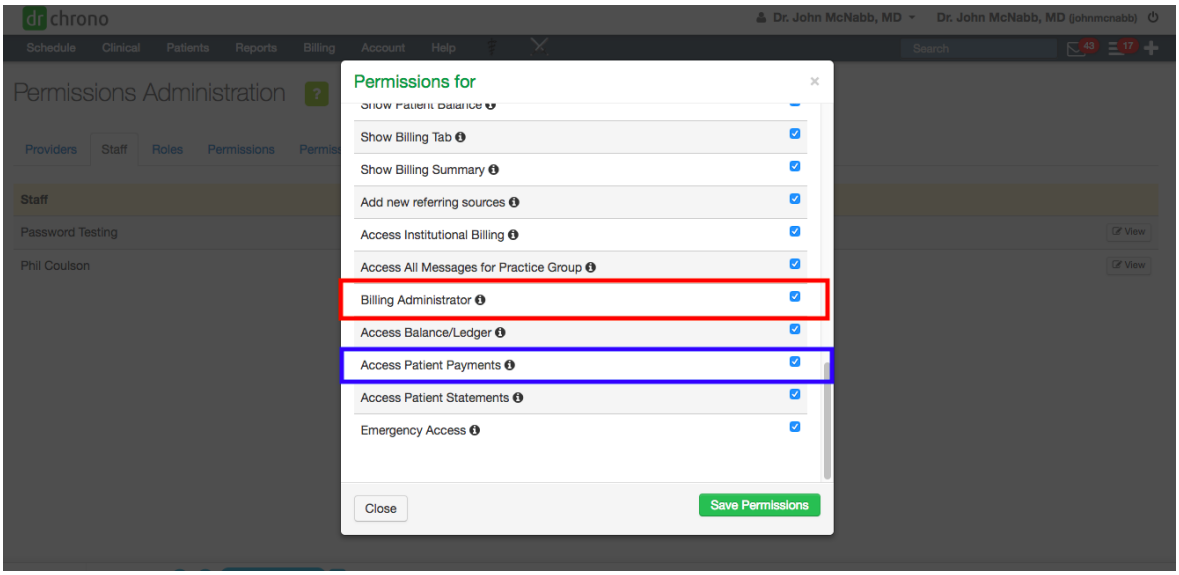
How Do I Unallocate a Payment if it is Posted to a Wrong Appointment?

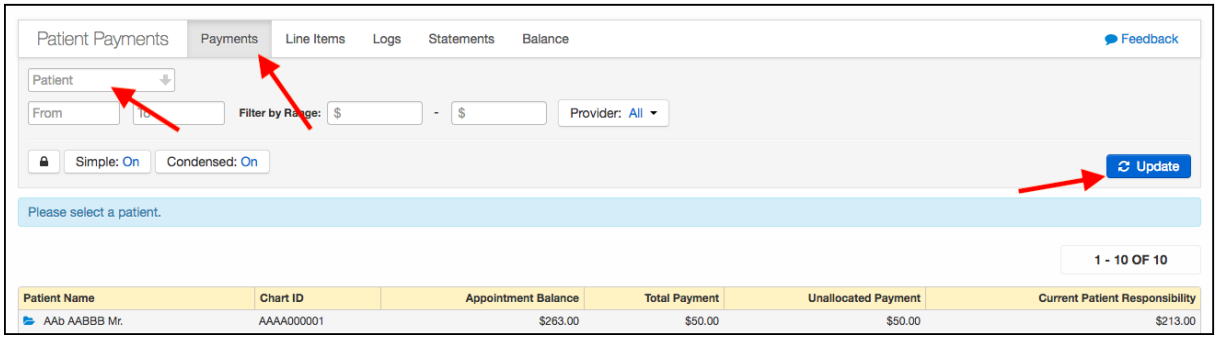
Last modified on 09/28/2026 2:22 pm EDT

If you allocate money to the wrong appointment or line item, you can unallocate/delete those funds so they can be posted to the correct patient's appointment.

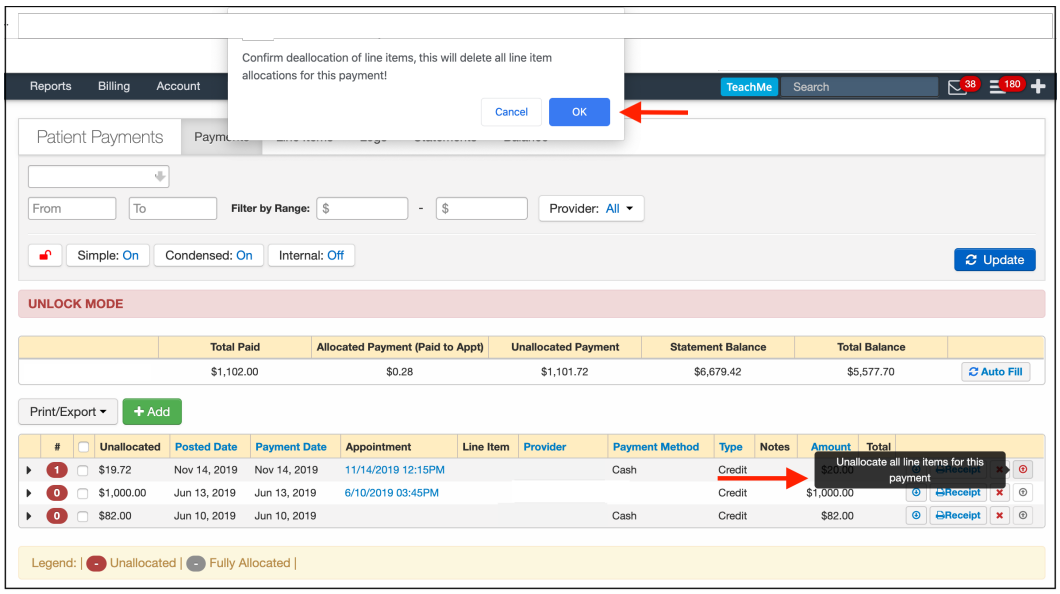
To do so, you'll need "Billing Administrator" and "Access Patient Payments" permissions allowed for your username. If you are a practice admin, make sure you have these permissions checked off for any Staff Members who will need to delete payments. (How to set Staff Permissions)



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 **Update**.



3. 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**.
4. Once in unlock mode, you can identify the payment that needs to be unallocated/deleted and click the red circle icon to the right of that payment. The system will ask you to confirm the deallocation, and after doing so, the payment will be deleted.


Confirm deallocation of line items, this will delete all line item allocations for this payment!
Cancel
OK
Reports
Billing
Account
TeachMe
Search
Patient Payments
From
To
Filter by Range:
Provider: All
Simple: On
Condensed: On
Internal: Off
Update
UNLOCK MODE
Total Paid
Allocated Payment (Paid to Appt)
Unallocated Payment
Statement Balance
Total Balance
$1,102.00
$0.28
$1,101.72
$6,679.42
$5,577.70
Auto Fill
Print/Export
+ Add
Unallocated
Posted Date
Payment Date
Appointment
Line Item
Provider
Payment Method
Type
Notes
Amount
Total
$19.72
Nov 14, 2019
Nov 14, 2019
11/14/2019 12:15PM
Cash
Credit
$1,000.00
Jun 13, 2019
Jun 13, 2019
6/10/2019 03:45PM
Credit
$1,000.00
Receipt
$82.00
Jun 10, 2019
Jun 10, 2019
Cash
Credit
$82.00
Receipt
Unallocate all line items for this payment
Legend: | Unallocated | Fully Allocated |