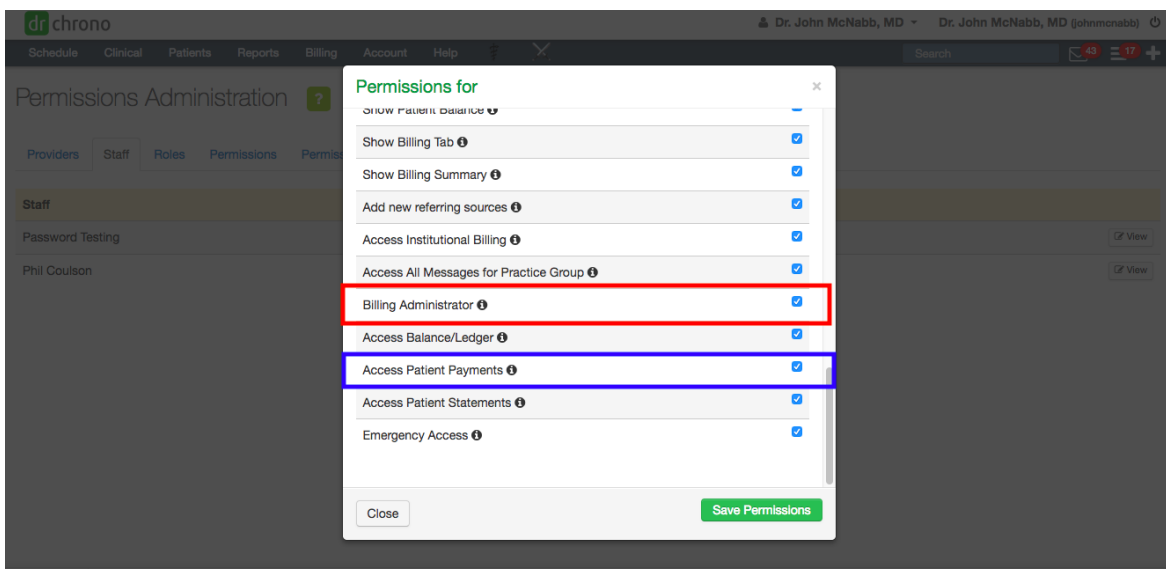


How Do I Unallocate a Payment if it is Posted to a Wrong Appointment?

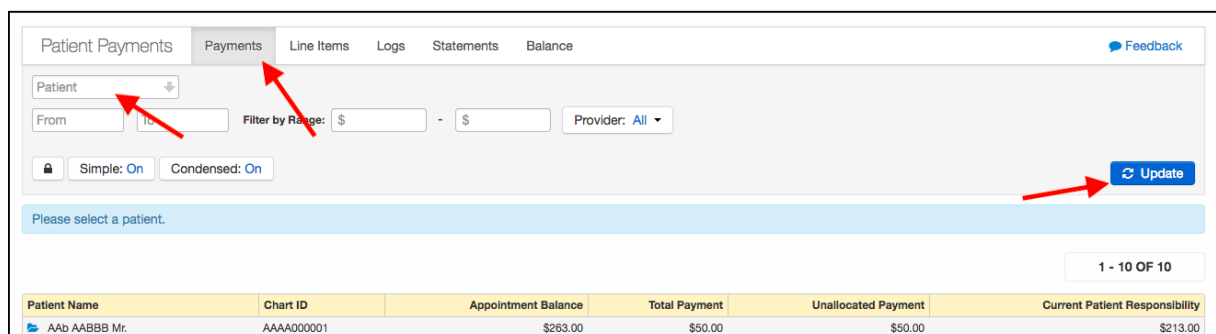
Last modified on 03/19/2026 2:21 pm EDT

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

TeachMe Search 38 180 +

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
1	<input type="checkbox"/>	\$19.72	Nov 14, 2019	Nov 14, 2019	11/14/2019 12:15PM		Cash	Credit			
0	<input type="checkbox"/>	\$1,000.00	Jun 13, 2019	Jun 13, 2019	6/10/2019 03:45PM		Cash	Credit		\$1,000.00	
0	<input type="checkbox"/>	\$82.00	Jun 10, 2019	Jun 10, 2019			Cash	Credit		\$82.00	

Legend: Unallocated | Fully Allocated