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

07/08/2024 7:44 pm EDT

If you allocate money to the wrong appointment or line item, you have the ability to 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)
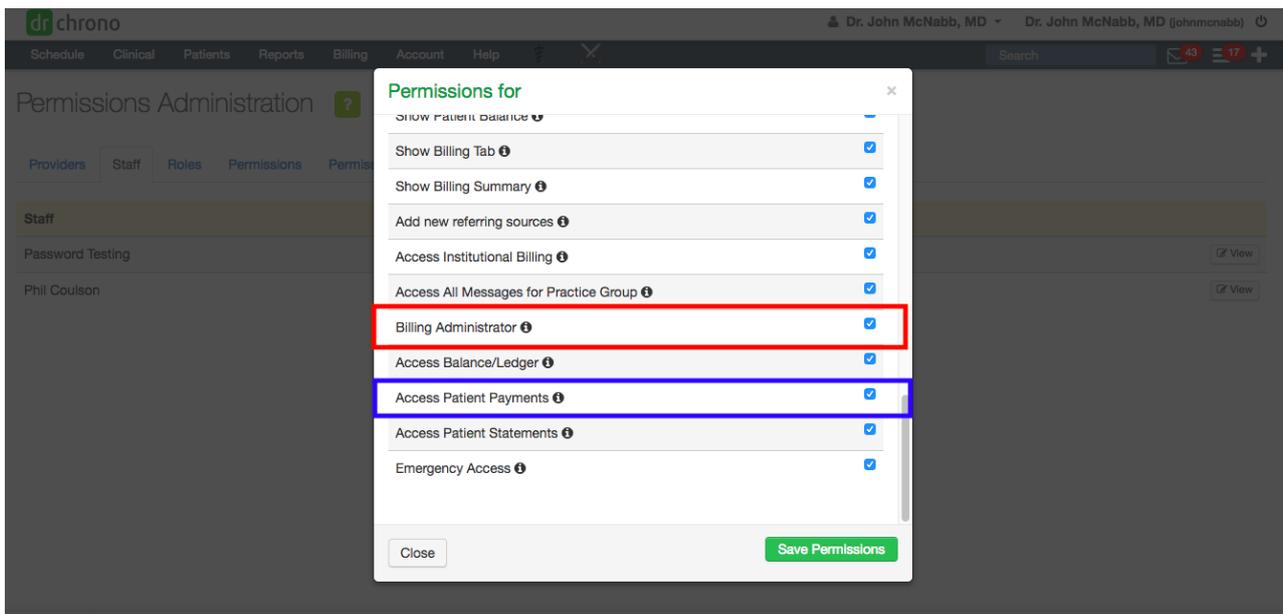
- With "Billing Administrator" and "Access Patient Payments" enabled, navigate to **Billing > Patient Payments**

BILLING

Billing Summary
Live Claims Feed
Patient Payments
Day Sheet
Transactions
Remittance Reports
Unmatched ERAs
Insurance Credit Card Payments
Accounts Receivable
Patient Statements
Product/Procedure
Patient Balance Ledger
Fee Schedule
Underpaid Items
Adjustment Master
Sales Tax
Billing Log

- Click on the **Payments** tab in the top left corner, then search for the patient you need and **Update**.

- You can then click 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**.

- Once in unlock mode, you can identify the payment which 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   ✉ 38   ≡ 180   +

Patient Payments   Payments   Line Items   Logs   Statements   Balance

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	☐	$19.72	Nov 14, 2019	Nov 14, 2019	11/14/2019 12:15PM			Cash	Credit		$20.00	Unallocate all line items for this payment		⊕
▸	0	☐	$1,000.00	Jun 13, 2019	Jun 13, 2019	6/10/2019 03:45PM				Credit		$1,000.00		⊕ 🖶Receipt ✖	⊕
▸	0	☐	$82.00	Jun 10, 2019	Jun 10, 2019				Cash	Credit		$82.00		⊕ 🖶Receipt ✖	⊕

Legend: | ⊖ Unallocated | ⊖ Fully Allocated |