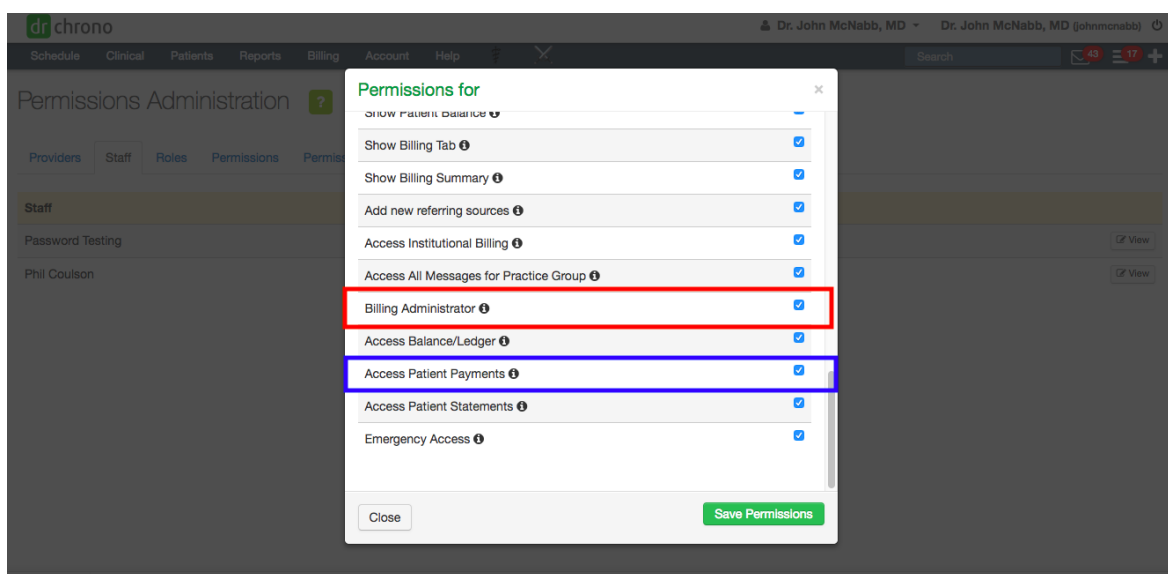


How Do I Unallocate a Payment if it is Posted to a Wrong Appointment?

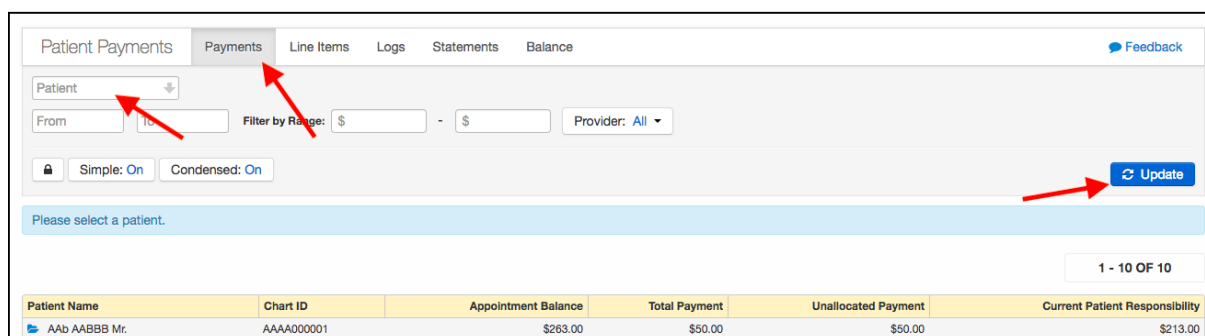
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If you allocate money to the wrong appointment or line item, you have the ability to unallocate/delete those funds so they can be posted to the correct patient's appointment.

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](#))



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**.

- 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.

The screenshot shows a software interface for managing patient payments. At the top, a confirmation dialog box is open, asking to confirm the deallocation of line items. The dialog has 'Cancel' and 'OK' buttons. A red arrow points to the 'OK' button. Below the dialog, the main interface is in 'UNLOCK MODE'. It features a summary table with columns: Total Paid, Allocated Payment (Paid to Appt), Unallocated Payment, Statement Balance, and Total Balance. Below this is a table of individual payments with columns: #, Unallocated, Posted Date, Payment Date, Appointment, Line Item, Provider, Payment Method, Type, Notes, Amount, and Total. A red arrow points to the 'Unallocated' checkbox for the first payment row. A tooltip over the tooltip says 'Unallocate all line items for this payment'. At the bottom, a legend indicates that a red circle represents 'Unallocated' and a grey circle represents 'Fully Allocated'.

	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

#	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			Credit		\$1,000.00	
0	<input type="checkbox"/>	\$82.00	Jun 10, 2019	Jun 10, 2019			Cash	Credit		\$82.00	

Legend: | ● Unallocated | ● Fully Allocated |