How do I correct a Patient Payment Receipt that has been entered incorrectly?	1
How do I delete a Receipt?	1
How do I find a deleted Receipt?	1
What to do with a Receipt that was entered in error with payments posted in a closed period?	2

How do I correct a Patient Payment Receipt that has been entered incorrectly?

Find the Receipt > Open/Attach to the Reference Batch listed on the Receipt Dashboard Be sure this receipt is not yet posted > see Help Doc - Undo Post, if any portion of the receipt is posted

- 1. Click 'Modify' on the Receipt Dashboard
- 2. Correct as needed
- 3. Add a note
- 4. [Save]

Add Payment Receipt		Re	ceipt: <u>77508</u>
Pe Payments Dashboard > Receipt History			
Pe Receipt Dashboard			Receipt: 77508
0: Pa Receipt Info Modify - 1			1
5763 SMITH, ALICE			
<u>G</u> uarantor			
- SELECT -			
If any part of the <u>Total Amount</u> is a copay t	then enter that amour	nt into the <u>'Copay'</u> field	
Check Amount Cash Amount	Card Amount	Total Amount	Copay 2
0.00 0.00	400.00	400.00	400.0
Refere <u>n</u> ce / Check Number	Esc	400.00	
Refere <u>n</u> ce / Check Number Rece <u>i</u> ved From	POS Pa <u>v</u> ment	row 400.00 Dis <u>b</u> ursed	
Refere <u>n</u> ce / Check Number Received From PREPAY	Esc POS Payment - SELECT - ▼	row 400.00 Dis <u>b</u> ursed	
Refere <u>n</u> ce / Check Number Received From PREPAY No <u>t</u> e	POS Payment - SELECT - ▼	trow 400.00 Dis <u>b</u> ursed	

How do I delete a Receipt?

If a receipt is entered in error, and you have security permissions to do so, [Delete] the receipt.

Reason for Deleted is required

Receipt Dashboard						Receipt: 109137		
- 🔀 Receipt Ir	fo <u>Modify</u> ——							
Post Date	Received Date	Туре	Last Mod	ified By B	RA	Batch	Reversed Receipt Number	
01/19/2017	03/01/2017	PP	webinar		-			
Patient			B	alance	Deser	- for Dalation		
SMITH, JOH	N [10007]			0.0	Reaso	n for Deleting	a subsect to sound	- 1
Guarantor			в	alance	aupii	cate receip	ot entered in error	
SMITH, JOH	V [11665]			0.0				
Reference/Cl	neck							
Check	Cash	Card	Amount	Copay				
20.00	0.00	0.00	20.0	00 2				
Received Fre	om	PC	S Payment	Disbursed				- 1
					(-			
Note					Su	bmit		
					4	U		1 N H
Actions -				_				<u> </u>
	Po	ost				Post (Expert	Mode)	F
	🚇 Print	Receipt				Delete		

How do I find a deleted Receipt?

On the 'Payments' page > Click **Receipt History** > in the 'Deleted' drop-down, choose 'Include' OR use the go-cut 'r' to get to the receipts page and use the same filters

		Payments	Dashboard				
		_ ⊠ Post Pay	ments, Adjustm	ents, and Refu	inds —		
			Post Payn	nent			
		- ± 🛛 Receip	ts with Escrow	Receipt Hist	ory -		
							_
Receipt History							
Filter Criteria <u>C</u> lear <u>R</u> eceipt	Received From	Received To	Posted From	Posted To	Type	•	
Filter Criteria <u>Clear</u> <u>Receipt</u> Fro <u>m</u> /To	Received From Reference	Received To	Posted From	Posted To Batch	Type All Dejeted	•]	Escrow Only
Filter Criteria <u>C</u> lear <u>Receipt</u> From/To	Received From Reference	Received To EFT All T	Posted From	Posted To Batch	Type All Dejeted Exclude • Exclude	•	Escrow Onl

What to do with a Receipt that was entered in error with payments posted in a closed period?

If you have a Receipt that was entered in error, that cannot be deleted because the payments were posted in a closed period, use these steps:

- 1. Go to the Encounter > click the checkbox to select the Receipt
- 2. Click [Undo Posting] (this action will create a new Receipt)
- 3. In the popup choose Action: 'Modify' this will land you on the new Receipt Dashboard
- 4. [Save]
- 5. On the new 'Receipt Dashboard', Click 'Modify
- 6. In the 'Disbursed' field choose 'E' the code indicating an 'Error Correction' then [Save] the Receipt

line in the second seco	Undo/Redo Postin	g Undo Posting					
─	Receipt	Description	Action				
Line Billable DOS From	NEW A Receipt will	be created with 50.00 of Escrow.	Modify •	3	M1	M2 M3 M4	Dx Unit Cl
1 🛷 06/29/2015	Note			PROB HX	; E		123 1.00 1
2 🛷 06/29/2015	DUPLICATE RECEIP	T - ENTERED IN ERROR		LLOW-UP			123 1.00 1
3 🛷 06/29/2015							123 1.00
4 🛷 06/29/2015	Save [F2] Cance			IATED W/M	CROS		123 1.00
	4						
Balance <u>Receipts</u> <u>ERA</u>							
Insurance Patient							
0.00							
Responsible Party				<u>121+</u>	Total		
[PATIENT/99]				-50.00	-50.00		
2							
Undo Posting							
DOS				aid	Pat Paid	Ins Ba	l Pat
□ 06/29/2015 1				0.00	50.00		0.00
Posted Date Receipt	Transaction Insurance	Role Transaction	Description		Amount	User	Batch/Period
06/30/2015 76196	99520 PATIENT	P PP PATIENT PA	YMENT		50.00		2847 / 2015-06

Receipt Da	shboard					Rec	eipt: <u>77443</u>
- 🔀 Receipt 5	Modify						
Post Date	Re. od Date	Туре	Entere	d By	ERA	Batch	Reversed Reco
06/06/2016	06/06/2016	20	SUPPO	ORT		2913	76196
Patient				Dishur			
FOX, RANDA	LL [6690]			E	6		
Reference/Ch	eck						
				Loo	kup Table		1
Check	Cash	Card	Amou	Add)		
0.00	0.00	0.00		Cada		Description	
Received Fro	m	PO	S Paym	Code	DEFAULT - NEED	TO BE DISBURS	ED IN OPENPM
				CP	CAPITATION PLA	N	
Note				E	ERROR CORREC	TION	
Reversal of R	eceipt No:76196			0	DISBURSED IN C	THER PM SYSTE	EM

This process removes the Payment from the *current* reporting period's A/R. You may use the 'Receipts Management' report, with the 'include Disbursed Receipts' option to review this action.