Keeping Track of Your Transactions

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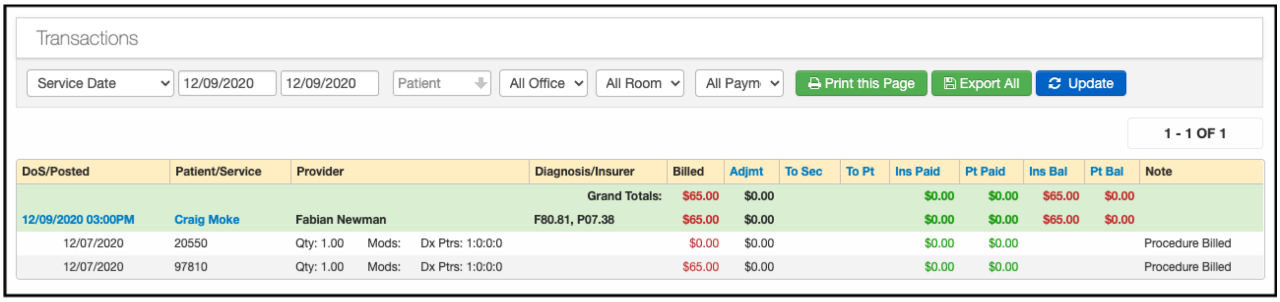
The transactions tool provides in-depth details on the payments within your practice. It does this by producing an appointment-by-appointment view detailing the diagnostics, services, inventory codes used, quantities, amount billed, adjustments, insurance paid, and patient paid.

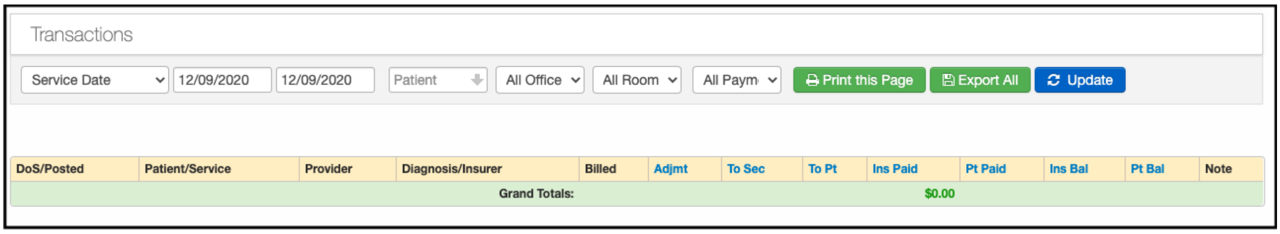
1. To begin using the transactions tool, hover over **Billing** on your DrChrono navigation bar and select **Transactions**.

2. Once you select **Transactions**, you'll be brought to the tool.



Using the Transactions Tool

With the transactions tool, you can track both insurance and patient payments at any time in your practice's history. To narrow your results, use the filters found at the top of the page.



You may choose to use or leave blank any of the available filters. The filters available are:

- **Service Date/Posted Date**: The selection in this box changes what type of date the date range refers to.
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    - **Service date** will give you the report by the date of service.
    - **Posted date** will give you the report by the date the transaction was posted in the DrChrono EHR.
- **Date Range**: This allows you to select the date range to search for. The date must be a non-future date. To

select a single day, both date boxes should be the same date.
- **Patient Name**: With this box, you may search for transactions of a specific patient.
- **Office**: You can filter specifically by the office to drill down into that office's activity.
- **Room**: You may also narrow your search to a specific room within an office if necessary.
- **Payment Type**: Here you can choose to see entries by payment type including cash, insurance, out-of-network insurance, auto accident, or worker's compensation

Once you select the filter options you would like, select the **Update** button.

After narrowing your results with filters, your results will be displayed in the box below your filters, displaying the following information:
- **Service/Posted Date**: The date of the appointment and the posted date of the services within the appointment.
- **Patient/Service**: The patient name and the service codes that correspond to services provided within the appointment.
- **Provider**: The provider associated with the appointment alongside the quantity of the service code, modifiers, and pointers related to billing.
- **Diagnosis/Insurer**: The diagnostic and insurance codes of the appointment
- **Billed**: The billed amount for each line item.
- **Adjustment**: The adjustment to the bill is determined by the insurance.
- **To Secondary Insurance**: The quantity billed to secondary insurance.
- **To Patient**: The quantity the patient is responsible for.
- **Insurance Paid**: The amount the insurance paid for.
- **Patient Paid**: The amount the patient paid for.
- **Insurance Balance**: The remaining balance for the insurance company.
- **Patient Balance**: The remaining balance for the patient.

If you would like, you also have the option to export your transactions by selecting the **Export All** button.

When you select **Export All**, your report will be delivered as a CSV file to your DrChrono message center. This CSV file is a spreadsheet file that can be viewed with any spreadsheet editor such as Microsoft Excel.

Also, you can print the transactions page to give to a patient by clicking on the **Print this Page** button. It will show you a PDF of the page, which you can then print.

Here is a video that will walk you through the Transactions Report.