

# Financial Transactions Report (fka Day Sheet) Updates: Debits tab

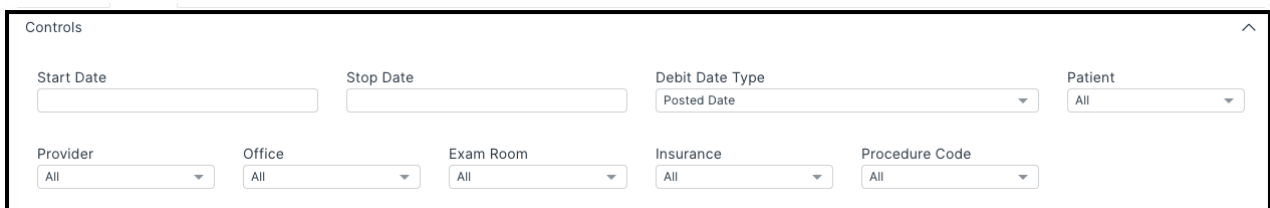
09/09/2024 9:57 am EDT

The second tab listed under the Day Sheet is the Debits tab. Here is where you can see charges added for the parameters you set.

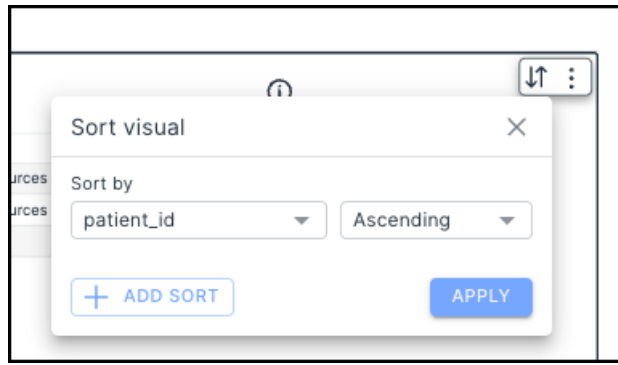


The controls available include:

- Start Date
- Stop Date
- Debit Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code

A screenshot of the "Controls" section in the report interface. It contains several input fields and dropdown menus. The first row includes "Start Date" (text input), "Stop Date" (text input), "Debit Date Type" (dropdown menu with "Posted Date" selected), and "Patient" (dropdown menu with "All" selected). The second row includes "Provider" (dropdown menu with "All" selected), "Office" (dropdown menu with "All" selected), "Exam Room" (dropdown menu with "All" selected), "Insurance" (dropdown menu with "All" selected), and "Procedure Code" (dropdown menu with "All" selected). There is an up arrow icon in the top right corner of the controls area.

Once you have set your parameters, the report will populate. You can use the up/down arrow on the right side to sort the information in numerous ways.



You can also export the report to CSV or Excel by clicking the 3 vertical dots. The report will be generated and available in your message center.

