

Financial Transactions (fka Day Sheet) Updates: Credits tab

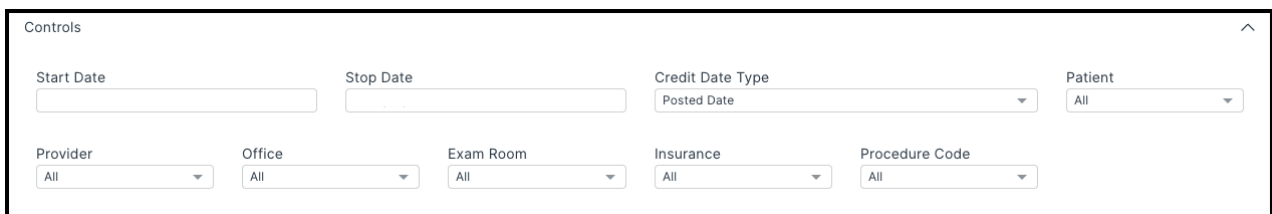
09/09/2024 10:00 am EDT

The third tab listed under the Day Sheet is the Credits tab. Here is where you can see payments added for the parameters you set.

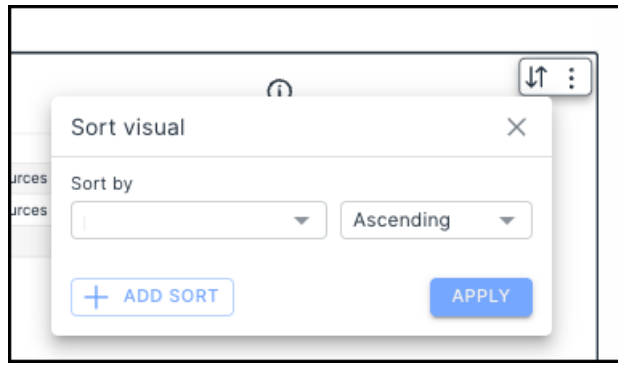


The controls available include:

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

A screenshot of the "Controls" section of the Financial Transaction Report interface. It contains several input fields and dropdown menus. The first row includes "Start Date" (text input), "Stop Date" (text input), "Credit 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.

