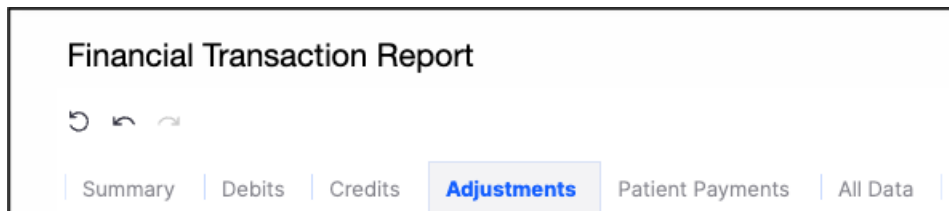


# Financial Transactions Report: Adjustments tab

Last modified on 07/16/2025 10:24 am EDT

The fourth tab listed under the Financial Transactions (fka Day Sheet) is the Adjustments tab. Here is where you can see charges added for the parameters you set.



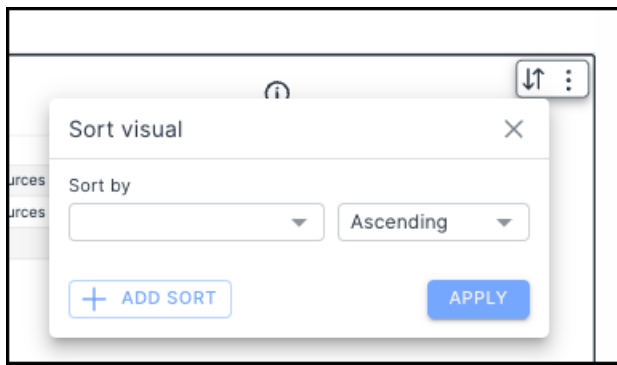
The controls available include:

- Date
- Adjustment Date Type
- Patient
- Code Category
- Payment Profile
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code
- Adjustment Code
- Include Future Appts

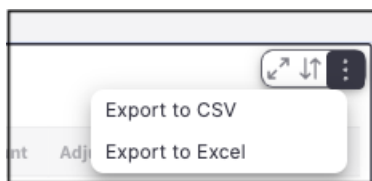
A screenshot of the 'Controls' section of the report. It has a title bar with the same six tabs as the header, with 'Adjustments' selected. Below the tabs is a section titled 'Controls' with a blue up arrow icon on the right. The controls are organized into two rows of six items each. Each item has a label and a control element (text input or dropdown menu).

Date	Adjustment Date Type	Patient	Code Category	Payment Profile	Provider
07/01/2023 - 07/16/2025	Posted Date	All	All	All	All
Office	Exam Room	Insurance	Procedure Code	Adjustment Code	Include Future Appts
All	All	All	All	All	Yes

Once the parameters are set, 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 downloads.



Financial Transaction Report			
<div>Summary   Debits   Credits   Adjustments   Patient Payments   All Data</div>			
Controls			
Date	Debits Date Type	Credits and Adjustment Date Type	Patient Payments Date Type
04/01/2017 - 04/10/2025	Posted Date	Posted Date	Posted Date
Provider	Office	Exam Room	Insurance
All	All	All	All
Payment Profile	Code Category	Include Future Appts	Adjustment Code
All	All	Yes	All
Data Freshness	Group By	Sub Group By	Tertiary Group By
04-10-2025 12:58 pm	Select one	Select one	Select one
Debits	Credits	Adjustments	Patient Payments
\$3,798,755.54	\$1,297,977.93	\$983,741.33	\$3,247.28