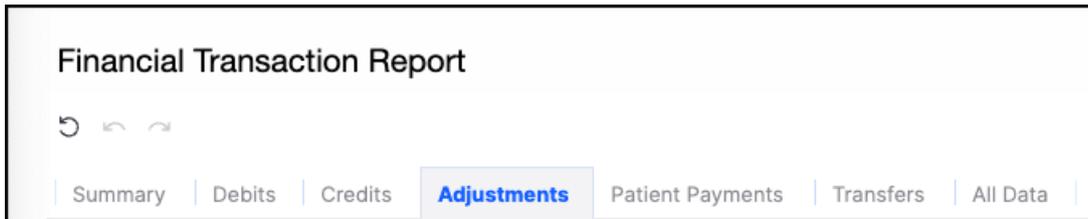


Financial Transactions Report: Adjustments tab

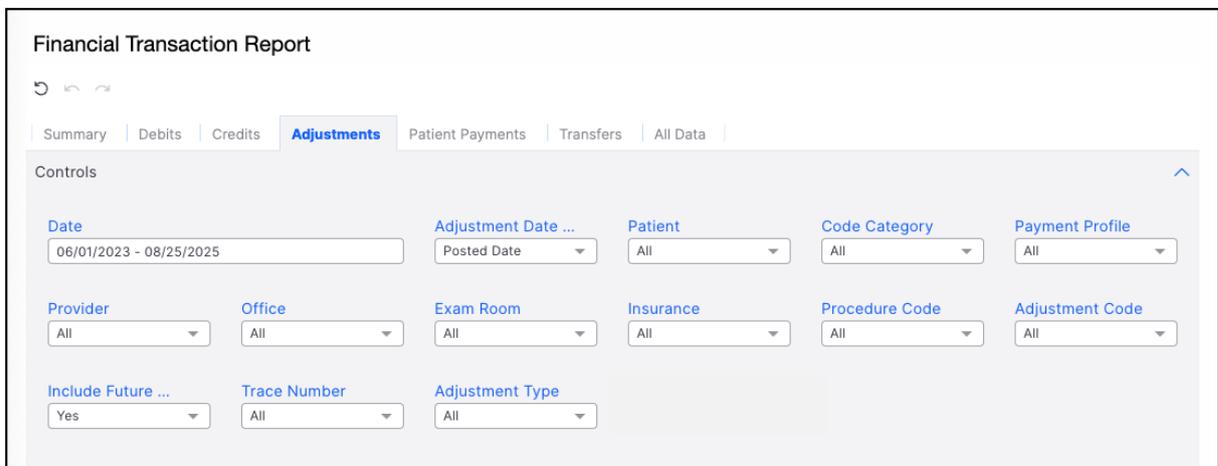
Last modified on 02/09/2026 1:44 pm EST

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.

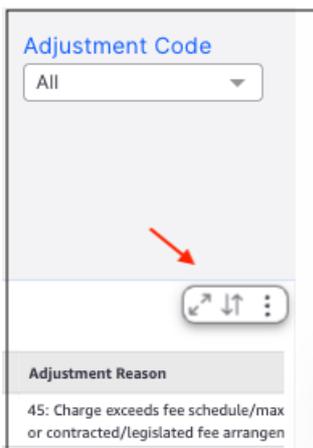


The controls available include:

- Date Range
- Adjustment Date Type
- Patient
- Code Category
- Payment Profile
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code
- Adjustment Code
- Include Future Appointments
- Trace Number
- Adjustment Type



Once the parameters are set, the report will populate. The diagonal arrows will maximize the report on the screen; the vertical arrows will sort the information and export options are under the three vertical dots. The exported report will be available in your downloads.



Financial Transaction Report

Summary | Debits | Credits | **Adjustments** | Patient Payments | Transfers | All Data

Controls

Date: 06/01/2023 - 08/25/2025 | Adjustment Date ...: Posted Date | Patient: All | Code Category: All | Payment Profile: All

Provider: All | Office: All | Exam Room: All | Insurance: All | Procedure Code: All | Adjustment Code: All

Include Future ...: Yes | Trace Number: All | Adjustment Type: All

Data Freshness: 08-25-2025 9:12 am

Group By: Reason Code

Adjustment Group By Summary

Reason Code	Count	Amount
45	1,683	\$245,321.78
Total	1,683	\$245,321.78

Adjustments

Posted Date	Patient Fullname	Date of Service	Provider Name	Insurance Name	Payer ID	Adjustment Amount	Adjustment Reason
Jun 1, 2023		May 31, 2023		Cigna	62308	\$36.69	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$110.75	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$43.06	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$55.93	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$62.09	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$47.01	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$52.05	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$573.80	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 1, 2023		May 31, 2023		Cigna	62308	\$7.43	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen
Jun 2, 2023		May 23, 2023		Cigna	62308	\$43.95	45: Charge exceeds fee schedule/max or contracted/legislated fee arrangen