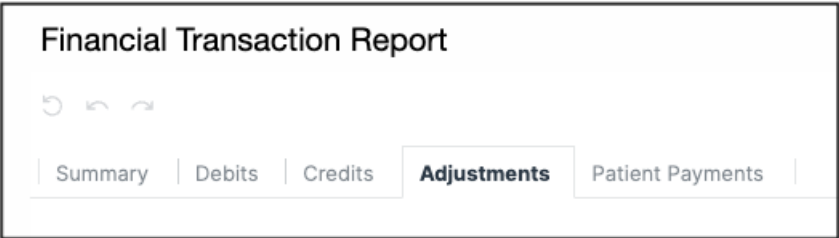


Financial Transactions Report: Adjustments tab

Last modified on 04/10/2025 3:21 pm 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.

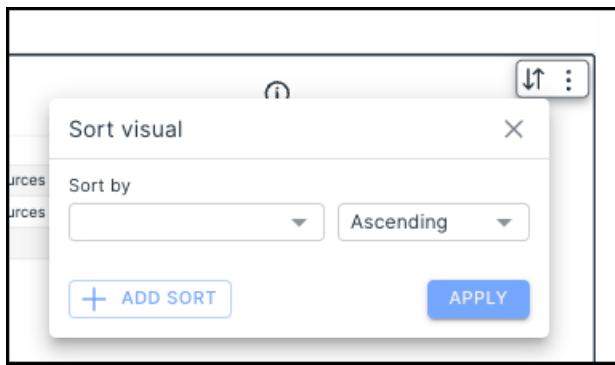


The controls available include:

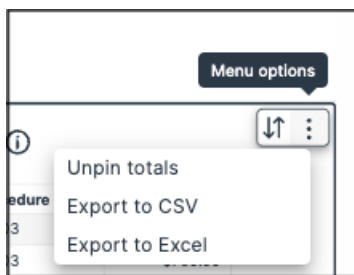
- Start Date
- Stop Date
- Adjustment Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code
- Adjustment Code

Start Date <input type="text"/>	Stop Date <input type="text"/>	Adjustment Date Type Posted Date ▼	Patient All ▼		
Provider All ▼	Office All ▼	Exam Room All ▼	Insurance All ▼	Procedure Code All ▼	Adjustment Code All ▼

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 message center.



Financial Transaction Report

Summary
Debits
Credits
Adjustments
Patient Payments
All Data

Controls

Date
04/01/2017 - 04/10/2025
Debits Date Type
Posted Date
Credits and Adjustment Date Type
Posted Date
Patient Payments Date Type
Posted Date
Patient
All
Provider
All
Office
All
Exam Room
All
Insurance
All
Procedure Code
All
Adjustment Code
All
Payment Profile
All
Code Category
All
Include Future Appts
Yes

Data Freshness
04-10-2025 12:58 pm
Group By
Select one
Sub Group By
Select one
Tertiary Group By
Select one

Debits
\$3,798,755.54
Credits
\$1,297,977.93
Adjustments
\$983,741.33
Patient Payments
\$3,247.28