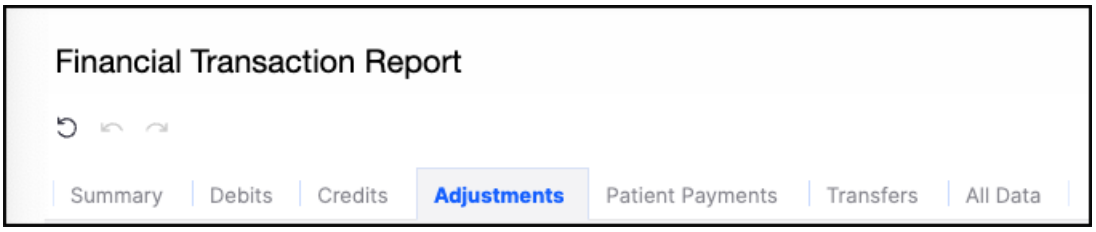
Financial Transactions Report: Adjustments tab

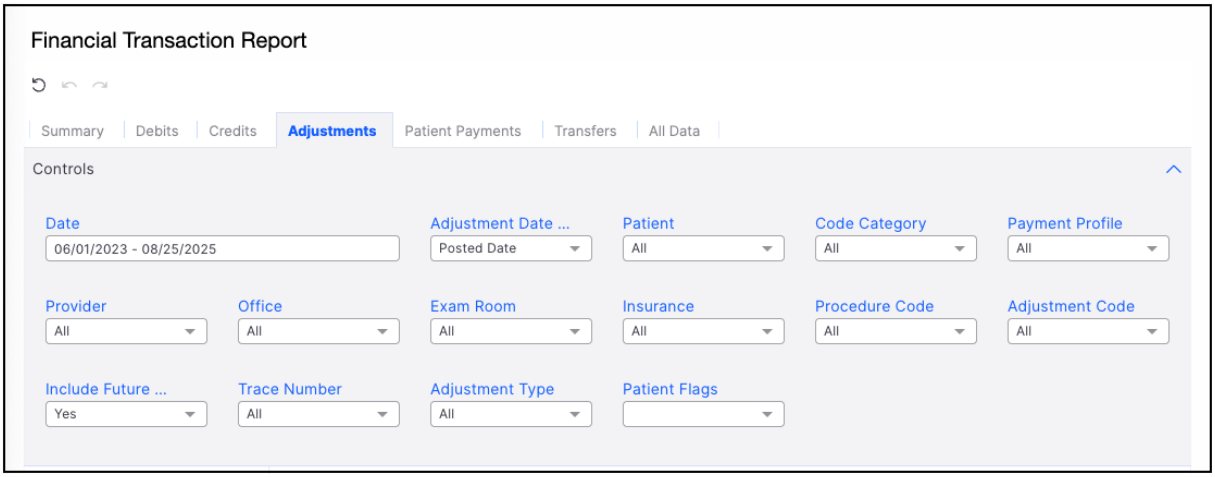
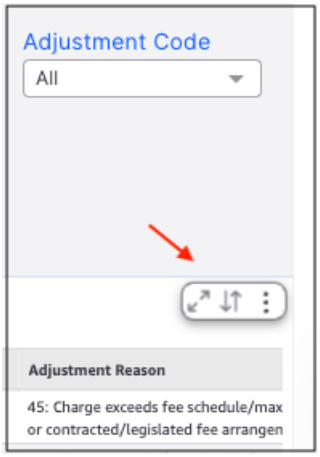
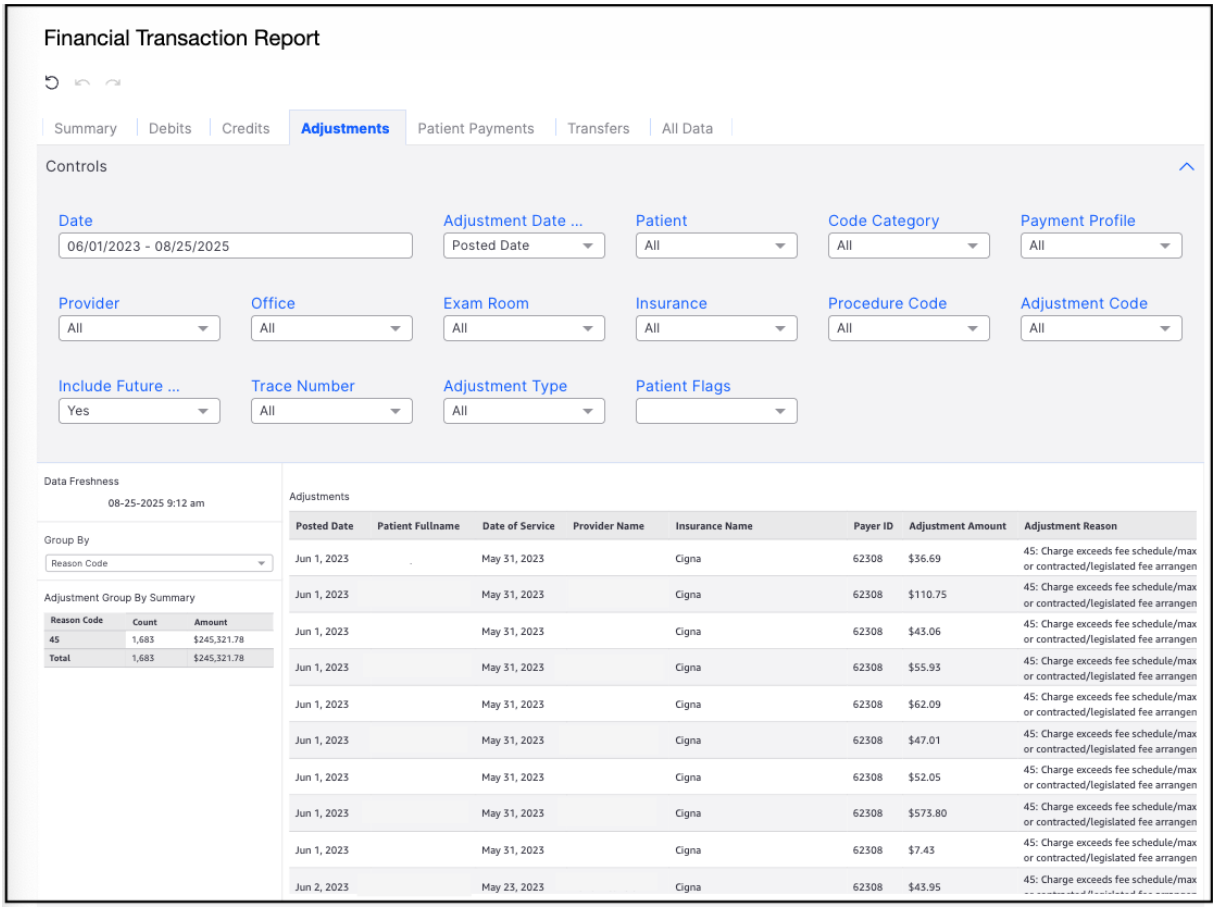
Last modified on 09/03/2025 8:00 am EDT

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 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
- Patient Flags



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.