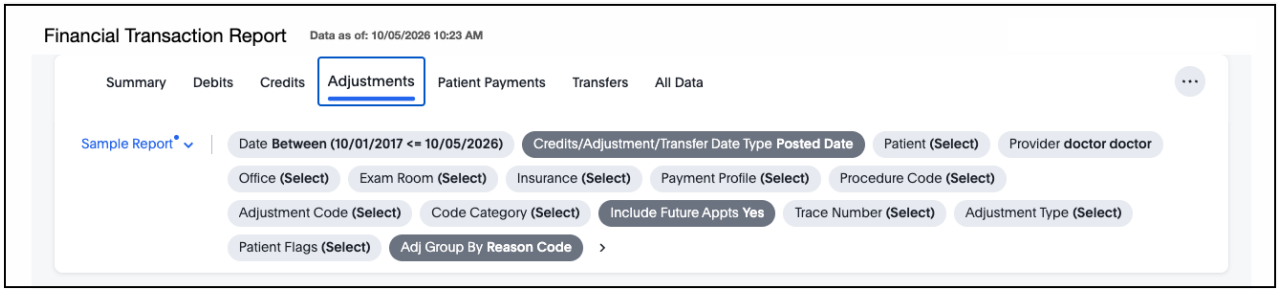
Financial Transactions Report: Adjustments tab

Last modified on 11/06/2026 1:02 pm EST

The fourth tab listed under the Financial Transactions (fka Day Sheet) is the Adjustments tab. Here is where you can see what adjustments were posted to patient accounts.



The controls available include:

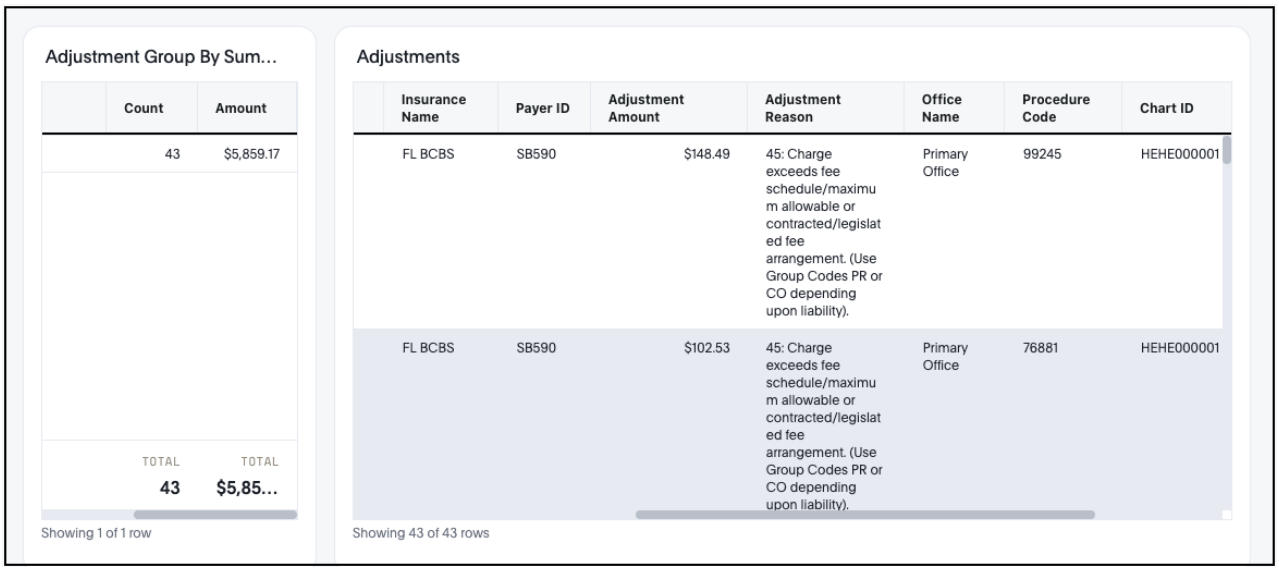
- Date or Date Range
- Debits Date Type
- Credits/Adjustment/Transfer Date Type
- Patient Payment Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Payment Profile
- Procedure Code
- Adjustment Code
- Code Category
- Include Future Appts
- Include Moved Cash
    - Select **Yes** if you want to view revenue listed for a certain period (could include payments that were originally posted on one day and then moved to a different posted date)
    - Select **No** if you want to view revenue by the original posted date, perhaps to verify against bank deposits
- Billed To
- Trace Number
- Adjustment Type
- Patient Flags
- Transfer Type

Options to group and view the information include:

- Debit Group By

- Group By
- Sub Group By
- Tert Group By
- Credit Group By
- Payment Group By
- Credit Date Type
- Transfer Group By

Once the parameters and group-by parameters are set, the report will populate. The left column will include a summary, and the detailed information will be listed to the right.



Hover over the top-right corner of the card to access options to view the underlying data, download the information, or maximize the view for presentation mode.

