

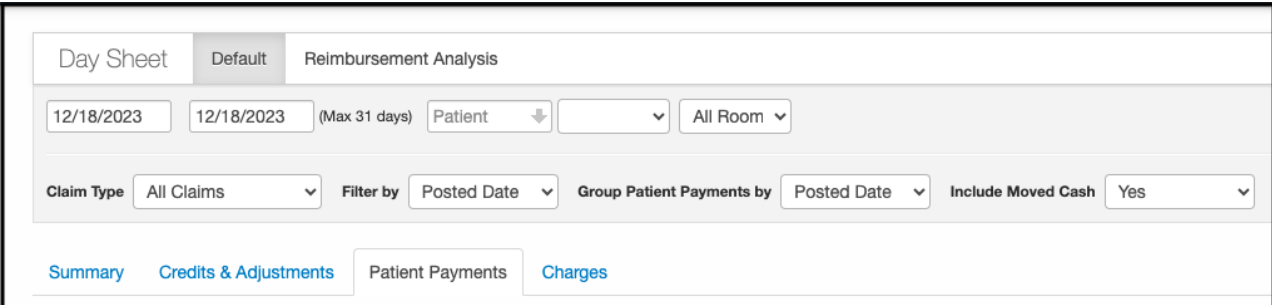
How do I Run a Report for a Specific Payment Method?

09/11/2024 9:03 am EDT

To get a report on different Patient Payment methods, please follow the steps outlined below:

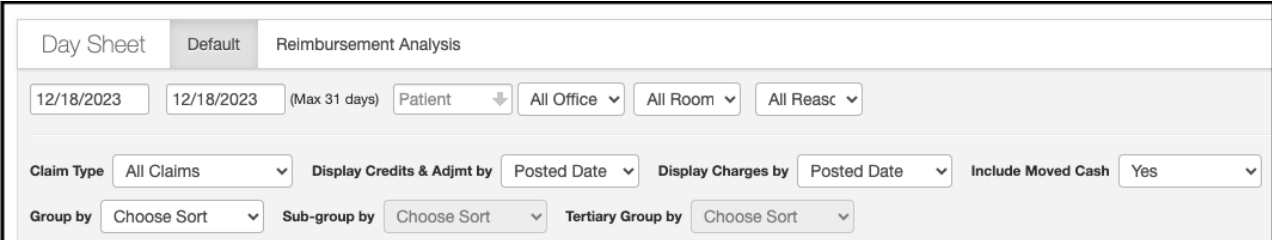
1. Navigate to **Billing** and select **Financial Transactions (Day Sheet)**.

2. Enter the Date range and click on the **Patient Payment** tab.



The screenshot shows the 'Day Sheet' interface with the 'Default' tab selected. The 'Reimbursement Analysis' section is active. The date range is set to 12/18/2023 to 12/18/2023 (Max 31 days). The 'Patient' dropdown is selected. The 'All Room' dropdown is selected. The 'Claim Type' is set to 'All Claims'. The 'Filter by' is set to 'Posted Date'. The 'Group Patient Payments by' is set to 'Posted Date'. The 'Include Moved Cash' is set to 'Yes'. The 'Patient Payments' tab is selected.

3. Under **Group Patient Payment by** Select **Method**.



The screenshot shows the 'Day Sheet' interface with the 'Default' tab selected. The 'Reimbursement Analysis' section is active. The date range is set to 12/18/2023 to 12/18/2023 (Max 31 days). The 'Patient' dropdown is selected. The 'All Office' dropdown is selected. The 'All Room' dropdown is selected. The 'All Reasc' dropdown is selected. The 'Claim Type' is set to 'All Claims'. The 'Display Credits & Adjmt by' is set to 'Posted Date'. The 'Display Charges by' is set to 'Posted Date'. The 'Include Moved Cash' is set to 'Yes'. The 'Group by' is set to 'Choose Sort'. The 'Sub-group by' is set to 'Choose Sort'. The 'Tertiary Group by' is set to 'Choose Sort'.

4. Click on **Update**.

5. If you want to export the data, click the green **Action** button and select **Export Current Selection**. The report will generate and appear in your message center.

