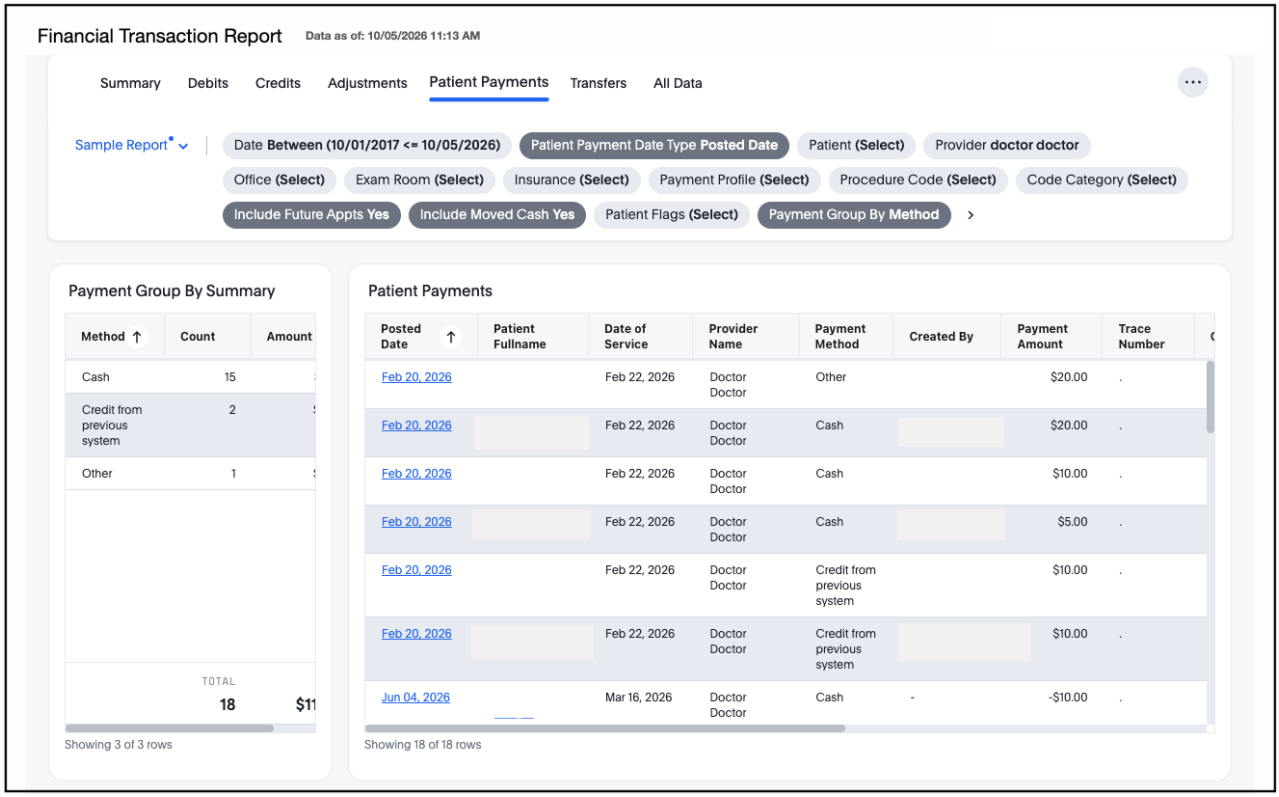
Financial Transactions Report: Patient Payments tab

Last modified on 11/06/2026 1:03 pm EST

The fifth tab listed under the Financial Transaction Report is the Patient Payments tab. This is where you can see patient payments added for the parameters you set.



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 report to access options to view the underlying data, download the information, or maximize the view for presentation mode.

