

Financial Transactions Report: All Data tab

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

The seventh tab listed under the Financial Transactions Report is the All Data tab.

Here, you can view all the information corresponding to the parameters you set, including Debits, Credits, Adjustments, Patient Payments, and Transfers. You will need to scroll to the right to see some of the columns.

Financial Transaction Report

Summary

Debits

Credits

Adjustments

Patient Payments

Transfers

All Data

Controls

Date

06/01/2023 - 08/25/2025

Debits Date Type

Posted Date

Credits and ...

Posted Date

Patient Payments...

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 ...

Yes

Trace Number

All

Patient Flags

Data Freshness

08-25-2025 9:12 am

All Data

Posted Date	Patient Fullname	Chart ID	Date of Service	Claim ID	Provider Name	Office Name	Exam Room	debit_amount	credit_amount	adjustment_amount	patient_payment_amount	in
3/18/24											\$500.00	
3/18/24			4/19/22			D Inpatient ...	Exam 1	\$750.00				Un
3/18/24			3/18/24			D Inpatient ...	Exam 1				\$750.00	Un
3/18/24			3/18/24			D Inpatient ...	Exam 1	\$750.00				Un
7/26/23			7/26/23			D Inpatient ...	Exam 2	\$150.00				Cl
9/19/23			9/19/23			Primary Office	Exam 1	\$150.00				Cl
11/20/23											(\$50.00)	
11/20/23											\$50.00	
11/20/23			4/14/22				Exam 1				\$50.00	
6/2/23						Primary Office	Exam 2			\$11.59		Ae
6/2/23			5/30/23			Primary Office	Exam 2			\$36.85		Ae
6/2/23						Primary Office	Exam 2			\$46.27		Ae
6/2/23			5/30/23			Primary Office	Exam 2		\$14.81			Ae
6/2/23						Primary Office	Exam 2		\$51.92			Ae
6/2/23			5/30/23			Primary Office	Exam 2		\$101.19			Ae
6/18/23						Primary Office	Exam 2	\$70.00				Ae

Hovering in the top right corner of the report will expose additional options. The diagonal arrows will maximize the report on the screen; the vertical lines will allow you to sort the information. Options to export the report can be found under the three vertical dots. The generated report will be available in your downloads.