

Financial Transactions Report: All Data tab

Last modified on 04/10/2025 3:22 pm EDT

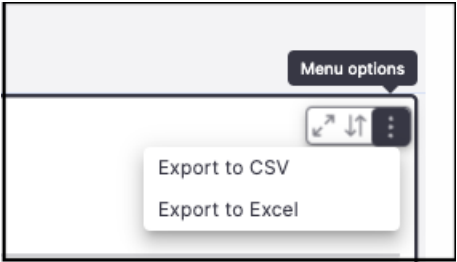
The sixth tab listed under the Financial Transactions Report (fka Day Sheet) is the All data tab. Here is where you can see all the information corresponding to the parameters you set. Including, Debits, Credits, Adjustments, and Patient Payments. You will need to scroll to the right to see some of the columns.

All Data							
Posted Date	Patient Fullname	Chart ID	Date of Service	Claim ID	Provider Name	Office Name	Exam Room

Debit	Credit	Adjustment	Patient Payment	Insurance Name	Trace Number	Procedure Code
-------	--------	------------	-----------------	----------------	--------------	----------------

Adj. Reason	Created By	Additional Notes	Payment Method
-------------	------------	------------------	----------------

You can export all details to either CSV or MS Excel by clicking on the 3 horizontal dots in the right corner and selecting your file format preference. The report will be generated and can be retrieved from your message center.



Financial Transaction Report



Summary | Debits | Credits | Adjustments | Patient Payments | All Data

Controls

Date 04/01/2017 - 04/10/2025	Debits Date Type Posted Date	Credits and Adjustment Date Type Posted Date	Patient Payments Date Type Posted Date	Patient All
Provider All	Office All	Exam Room All	Insurance All	Procedure Code All
Payment Profile All	Code Category All	Include Future Appts Yes	Adjustment Code All	

Data Freshness 04-10-2025 12:58 pm	Group By Select one	Sub Group By Select one	Tertiary Group By Select one
Debits \$3,798,755.54	Credits \$1,297,977.93	Adjustments \$983,741.33	Patient Payments \$3,247.28