

# Financial Transactions Report: All Data tab

Last modified on 02/09/2026 1:48 pm EST

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

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     |               |                   |                        | Ci |
| 9/19/23     |                  |          | 9/19/23         |          |               | Primary Office  | Exam 1    | \$150.00     |               |                   |                        | Ci |
| 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 |
| 6/12/23     |                  |          |                 |          |               | Primary Office  | Exam 4    | \$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.