

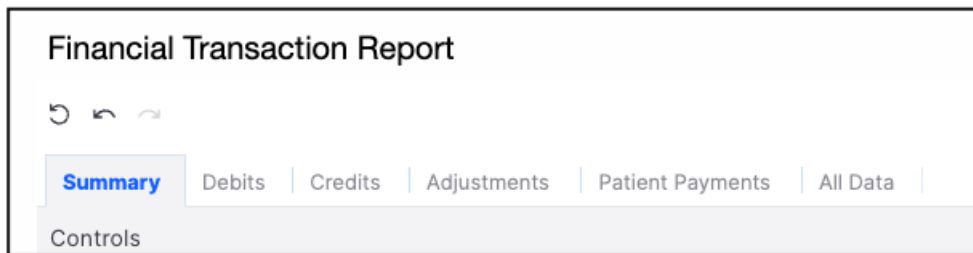
Financial Transactions Report: How to run a report for a specific insurance

Last modified on 07/16/2025 10:38 am EDT

Included in the Financial Transactions report is the option to run a report for a specific insurance.

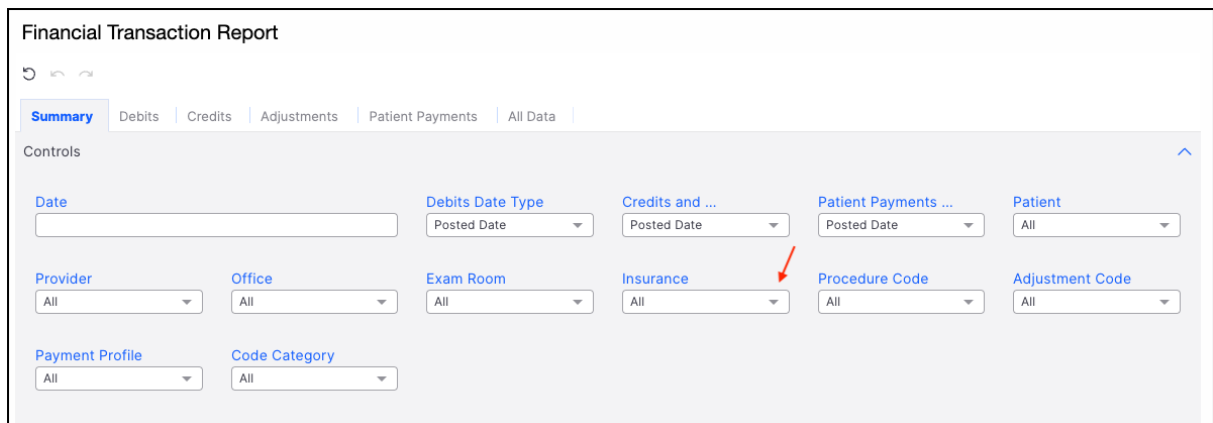
To find the report

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



The screenshot shows the 'Financial Transaction Report' interface. At the top, there are navigation icons (refresh, back, forward). Below them is a tab bar with 'Summary' (highlighted in blue), 'Debits', 'Credits', 'Adjustments', 'Patient Payments', and 'All Data'. At the bottom of this section is a 'Controls' bar.

2. On the Summary Tab, locate the Insurance option.



This screenshot shows the 'Controls' section of the 'Financial Transaction Report' interface. It contains several dropdown menus for filtering the report. A red arrow points to the 'Insurance' dropdown menu, which is currently set to 'All'. The other dropdowns include 'Date', 'Debits Date Type', 'Credits and ...', 'Patient Payments ...', 'Patient', 'Provider', 'Office', 'Exam Room', 'Procedure Code', 'Adjustment Code', 'Payment Profile', and 'Code Category'.

3. Press the **down arrow** within the Insurance option. Here you will be able to select or deselect which payers you would like the report to include.

Insurance

All

Search value

☒ Select all

☒ NULL

☒ Empty string

☒ Aetna

☒ Aetna - Institutional clai...

☒ Aetna PPO

☒ Blue Cross and Blue Shi...

☒ CIGNA

☒ Cigna

☒ Cigna PPO

☒ GEICO

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

Adjustment Code

All

Payment Profile

All

Code Category

All

Include Future Appts

Yes

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