

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

Last modified on 08/07/2025 10:36 am EDT

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

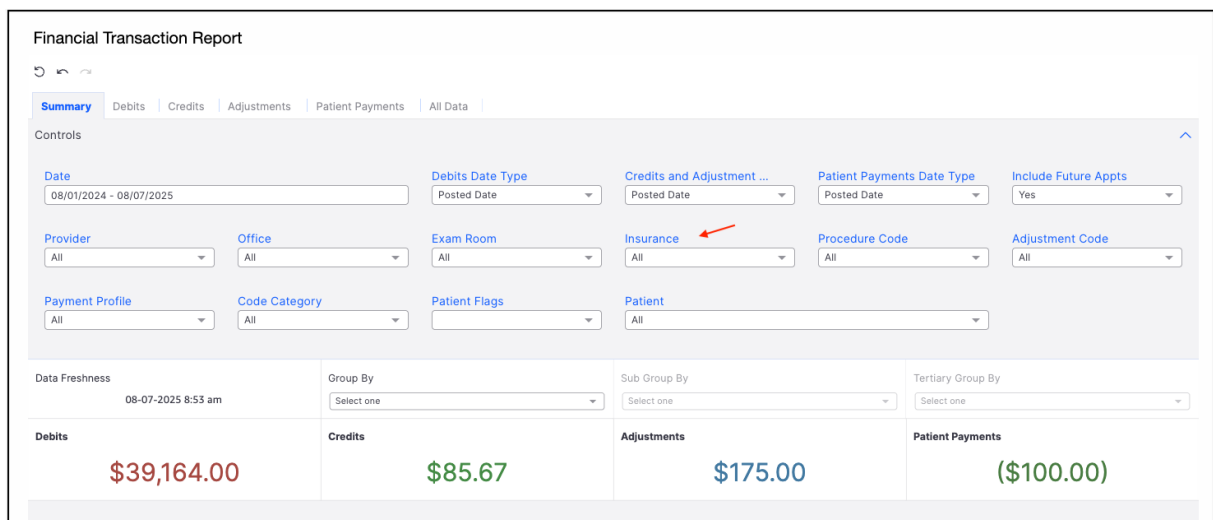
To find the report

1. Navigate to **Billing > Financial Transactions**



The screenshot shows the 'Financial Transaction Report' header with navigation icons. Below the header is a tabbed interface with 'Summary' selected, followed by 'Debits', 'Credits', 'Adjustments', 'Patient Payments', and 'All Data'. At the bottom of this section is a 'Controls' label.

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



The screenshot shows the 'Financial Transaction Report' interface with the 'Summary' tab selected. The 'Controls' section is expanded, showing various filters. The 'Insurance' dropdown menu is highlighted with a red arrow. Below the controls are sections for 'Data Freshness', 'Group By', 'Sub Group By', and 'Tertiary Group By'. At the bottom, there is a summary table with four columns: Debits, Credits, Adjustments, and Patient Payments.

Debits	Credits	Adjustments	Patient Payments
\$39,164.00	\$85.67	\$175.00	(\$100.00)

3. Press the **down arrow** within the Insurance option. Here you can 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

08/01/2024 - 08/07/2025

Debits Date Type

Posted Date

Credits and ...

Posted Date

Patient Payments ...

Posted Date

Include Future Appts

Yes

Provider

All

Office

All

Exam Room

All

Insurance

All

Procedure Code

All

Adjustment Code

All

Payment Profile

All

Code Category

All

Patient Flags

Patient

All

Data Freshness

08-07-2025 8:53 am

Group By

Insurance

Sub Group By

Select one

Tertiary Group By

Select one

Debits

\$39,164.00

Credits

\$85.67

Adjustments

\$175.00

Patient Payments

(\$100.00)

Insurance

Total Debits

Total Credits

Total Adjustments

Total Patient Payments

Aetna [60054]

\$25,750.00

\$0.00

\$25.00

(\$100.00)

\$13,014.00

\$85.67

\$150.00

(\$15.00)

Cigna [62308]

\$225.00

\$0.00

\$0.00

\$15.00

UMR United Medical Resources [39026]

\$175.00

\$0.00

\$0.00

\$0.00

\$39,164.00

\$85.67

\$175.00

(\$100.00)