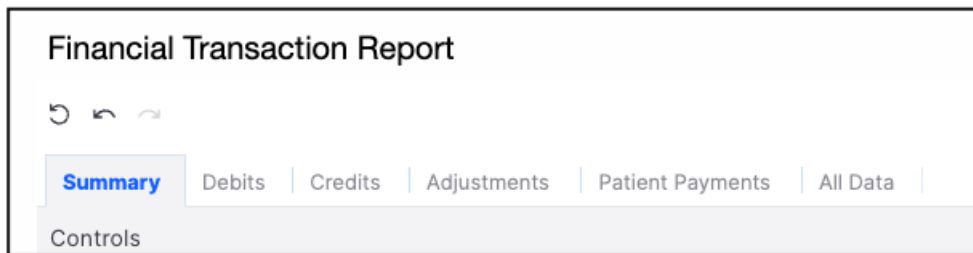# Financial Transactions Report: How to run a report for a specific insurance

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.
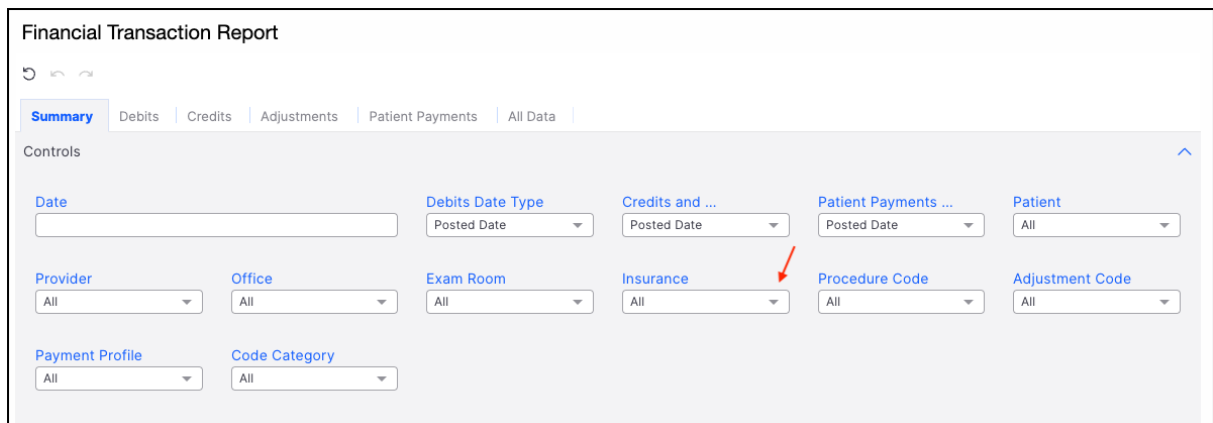
To find the report

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

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

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	Debits Date Type	Credits and Adjustment Date Type	Patient Payments Date Type	Patient
04/01/2017 - 04/10/2025	Posted Date ▾	Posted Date ▾	Posted Date ▾	All ▾

Provider	Office	Exam Room	Insurance	Procedure Code	Adjustment Code
All ▾	All ▾	All ▾	All ▾	All ▾	All ▾

Payment Profile	Code Category	Include Future Appts
All ▾	All ▾	Yes ▾

Data Freshness	Group By	Sub Group By	Tertiary Group By
04-10-2025 12:58 pm	Select one ▾	Select one ▾	Select one ▾

Debits	Credits	Adjustments	Patient Payments
$3,798,755.54	$1,297,977.93	$983,741.33	$3,247.28