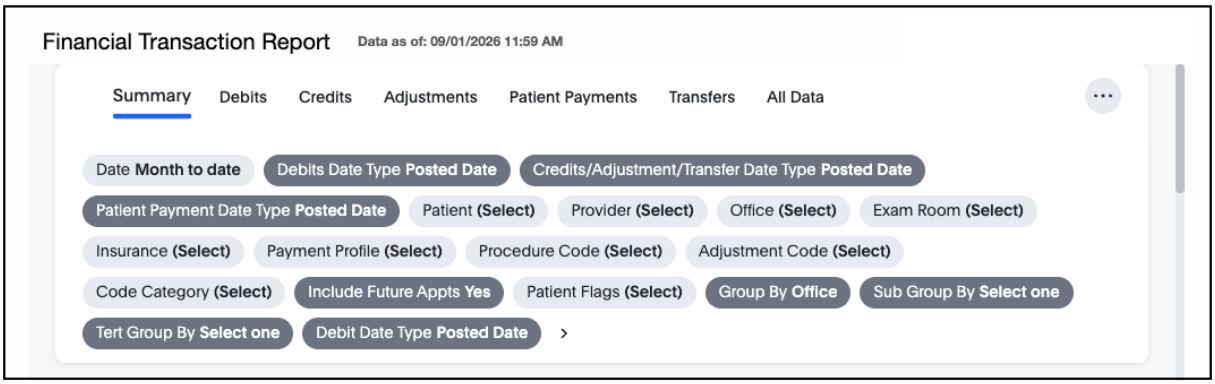
Financial Transactions Report: How to run a report for a specific insurance

Last modified on 11/06/2026 1:06 pm EST

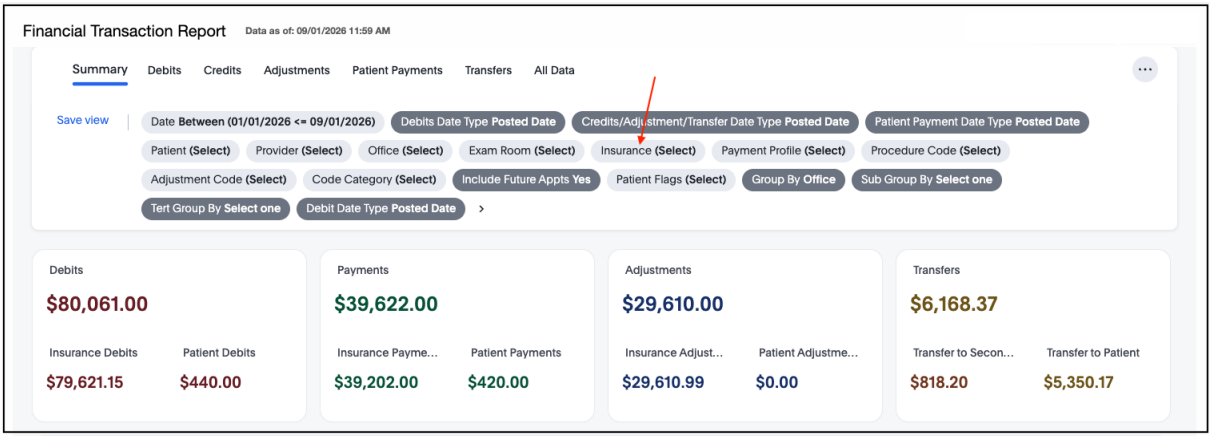
Included in the Financial Transactions report is the option to run a report for a specific insurance.

To find the report

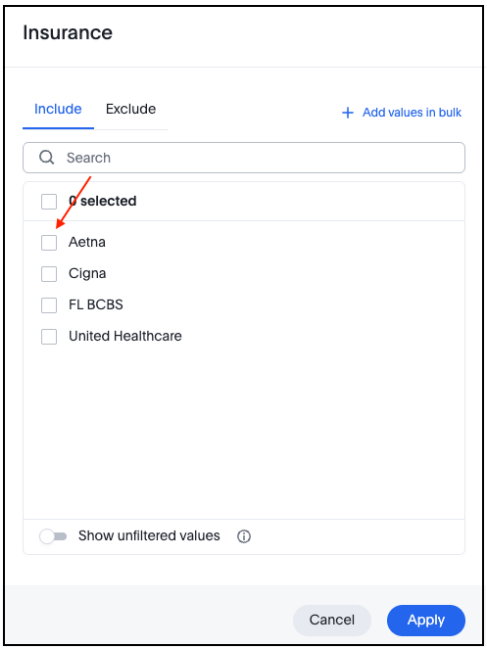
1. Navigate to **Billing > Financial Transactions**



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



3. Press the **down arrow** within the Insurance option. Here, you can select or deselect which payers you would like the report to include by selecting the box to the left of the payer name.



The report will run with the parameters you selected.

