

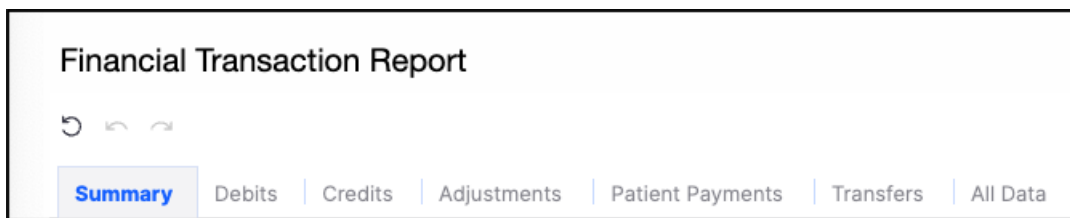
Financial Transactions Report: How to run a report for a specific insurance

Last modified on 02/09/2026 1:50 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.

This screenshot displays the 'Financial Transaction Report' in the 'Summary' tab. It includes a 'Controls' section with various filters and a summary table below.

Controls:

- Date: 06/01/2023 - 08/25/2025
- Debits Date Type: Posted Date
- Credits and Adjustment ...: Posted Date
- Patient Payments Date ...: Posted Date
- Patient: All
- Provider: All
- Office: All
- Exam Room: All
- Insurance: All (indicated by a red arrow)
- Procedure Code: All
- Adjustment Code: All
- Payment Profile: All
- Code Category: All
- Include Future Appts: Yes

Summary Table:

Debits		Payments		Adjustments		Transfers	
\$854,811.31		\$458,333.13		\$245,321.78		\$45,546.37	
Insurance Debits	Patient Debits	Insurance Payments	Patient Payments	Insurance Adjustments	Patient Adjustments	Transfer to Secondary	Transfer to Patient
\$854,811.31	No data	\$457,033.13	\$1,300.00	\$245,321.78	No data	\$1,887.33	\$43,659.04

Data Freshness: 08-25-2025 9:12 am

Group By: Select one

Sub Group By: Select one

Tertiary Group By: Select one

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

The report will run with the parameters you selected.

Financial Transaction Report

Summary

Debits

Credits

Adjustments

Patient Payments

Transfers

All Data

Controls

Date

Debits Date Type

Credits and ...

Patient Payments...

Patient

Provider

Office

Exam Room

Insurance

Procedure Code

Adjustment Code

Payment Profile

Code Category

Include Future ...

Debits		Payments		Adjustments		Transfers	
\$565,716.13		\$301,761.80		\$152,643.51		\$27,650.60	
Insurance Debits	Patient Debits	Insurance Payments	Patient Payments	Insurance Adjustments	Patient Adjustments	Transfer to Secondary	Transfer to Patient
\$565,716.13	No data	\$301,761.80	\$0.00	\$152,643.51	No data	\$1,887.33	\$25,763.27
Data Freshness		Group By	Sub Group By	Tertiary Group By			
08-25-2025 9:12 am		Select one	Select one	Select one			