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

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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.

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Summary Debits	Credits Adjustments	Patient Payments Tra	Insfers All Data					
ontrols								
Date		Debit	s Date Type	Credits and Adjustmer	t Patient Payme	nts Date Patie	nt	
06/01/2023 - 08/25/2025		Post	ed Date	Posted Date Posted Date				
Provider	Office	Exam	Room	Insurance	Procedure Cod	le Adjus	tment Code	
All	- All	▼ All		All	▼ All	▼ All		
Payment Profile	Code Categ	ory Inclu	de Future Appts	Patient Flags				
All	All	▼ Yes	<b>*</b>		Ŧ			
ebits		Payments		Adjustments		Transfers		
\$854,811.31		\$458,	\$458,333.13		\$245,321.78		\$45,546.37	
surance 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	
		Group By		Sub Group By		Tertiary Group By		
ata Freshness								

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 Q
Select all
VILL
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.

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Controls		,					,
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06/01/2023 - 08	/25/2025	P	osted Date 👻	Posted Date	Posted Dat	te 🔻 🗛	
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All	- All	- A		Aetna, Aetna PP	- All	- A	
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