

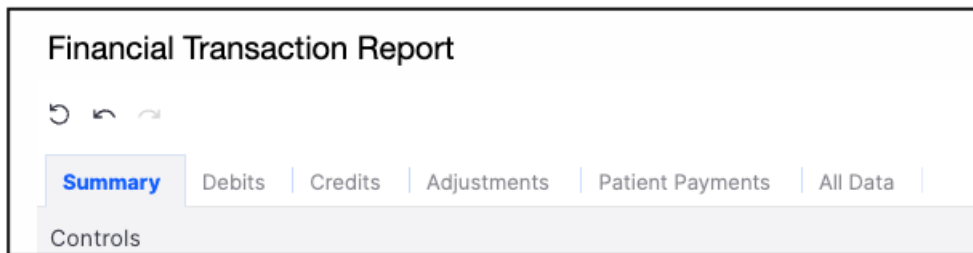
Financial Transactions Report: How to run a report for a specific insurance

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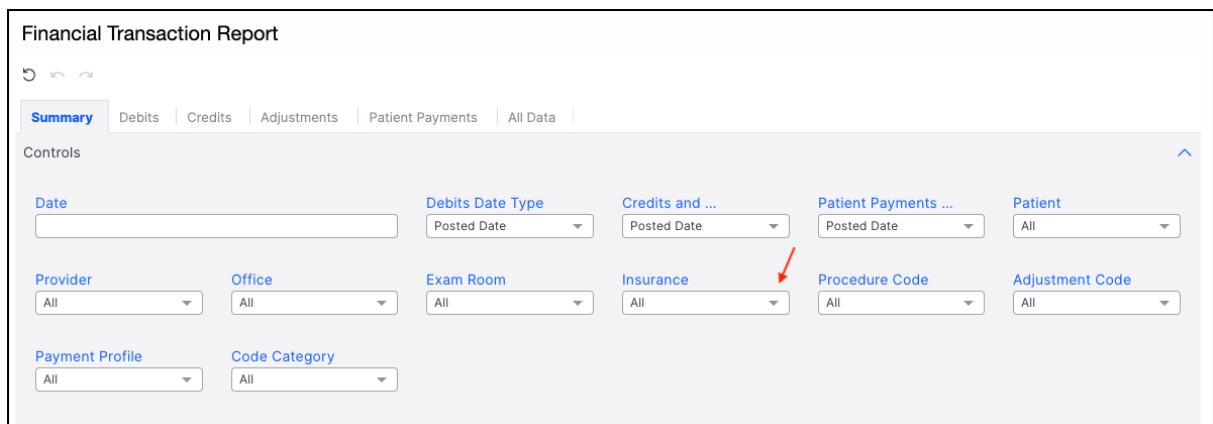
Included in the Financial Transactions report is the option to run a report for a specific insurance.

To find the report

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



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

A screenshot of the 'Financial Transaction Report' interface, showing the 'Controls' section expanded. The 'Summary' tab is selected. The 'Controls' section contains several dropdown menus: 'Date', 'Debits Date Type' (set to 'Posted Date'), 'Credits and ...' (set to 'Posted Date'), 'Patient Payments ...' (set to 'Posted Date'), 'Patient' (set to 'All'), 'Provider' (set to 'All'), 'Office' (set to 'All'), 'Exam Room' (set to 'All'), 'Insurance' (set to 'All', with a red arrow pointing to the down arrow), 'Procedure Code' (set to 'All'), 'Adjustment Code' (set to 'All'), 'Payment Profile' (set to 'All'), and 'Code Category' (set to 'All'). The interface has a light gray background.

3. Click on 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

04/01/2017 - 04/10/2025

Debits Date Type

Posted Date

Credits and Adjustment Date Type

Posted Date

Patient Payments Date Type

Posted Date

Patient

All

Provider

All

Office

All

Exam Room

All

Insurance

All

Procedure Code

All

Adjustment Code

All

Payment Profile

All

Code Category

All

Include Future Appts

Yes

Data Freshness

04-10-2025 12:58 pm

Group By

Select one

Sub Group By

Select one

Tertiary Group By

Select one

Debits

\$3,798,755.54

Credits

\$1,297,977.93

Adjustments

\$983,741.33

Patient Payments

\$3,247.28