

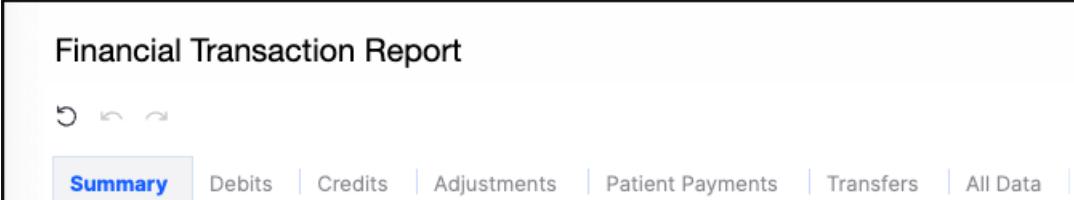
Financial Transactions Report: How to run a report for a specific insurance

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

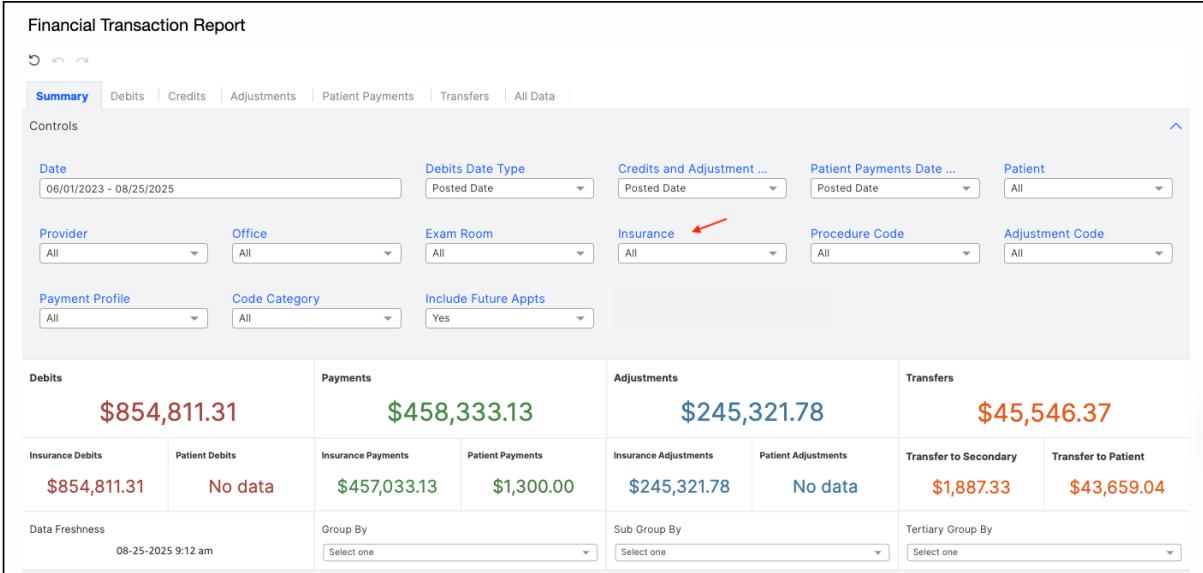
1. Navigate to Billing > Financial Transactions



Financial Transaction Report

Summary Debits Credits Adjustments Patient Payments Transfers All Data

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



Financial Transaction Report

Summary Debits Credits Adjustments Patient Payments Transfers All Data

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 (highlighted with a red arrow)

Procedure Code: All Adjustment Code: All

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

Debits	Payments	Adjustments	Transfers
\$854,811.31	\$458,333.13	\$245,321.78	\$45,546.37
Insurance Debits: \$854,811.31	Patient Debits: No data	Insurance Payments: \$457,033.13	Patient Payments: \$1,300.00
Insurance Adjustments: \$245,321.78	Patient Adjustments: No data	Transfer to Secondary: \$1,887.33	Transfer to Patient: \$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	
06/01/2023 - 08/25/2025	Posted Date	Posted Date	Posted Date	All	
Provider	Office	Exam Room	Insurance	Procedure Code	Adjustment Code
All	All	All	Aetna, Aetna PP...	All	All
Payment Profile	Code Category	Include Future ...			
All	All	Yes			

Debits	Payments	Adjustments	Transfers
\$565,716.13	\$301,761.80	\$152,643.51	\$27,650.60
Insurance Debits	Patient Debits	Insurance Payments	Patient Payments
\$565,716.13	No data	\$301,761.80	\$0.00

Data Freshness	Group By	Sub Group By	Tertiary Group By
08-25-2025 9:12 am	Select one	Select one	Select one