

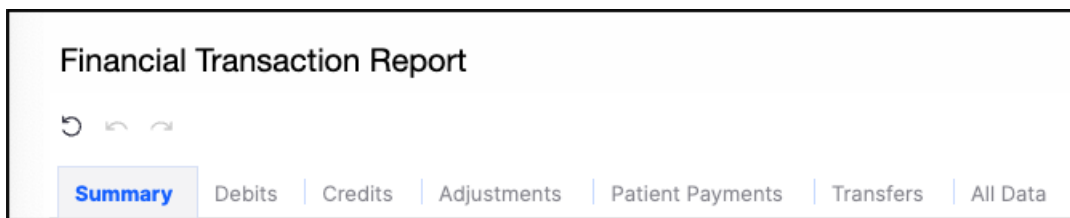
Financial Transactions Report: How to run a report for a specific insurance

Last modified on 09/03/2025 8:09 am EDT

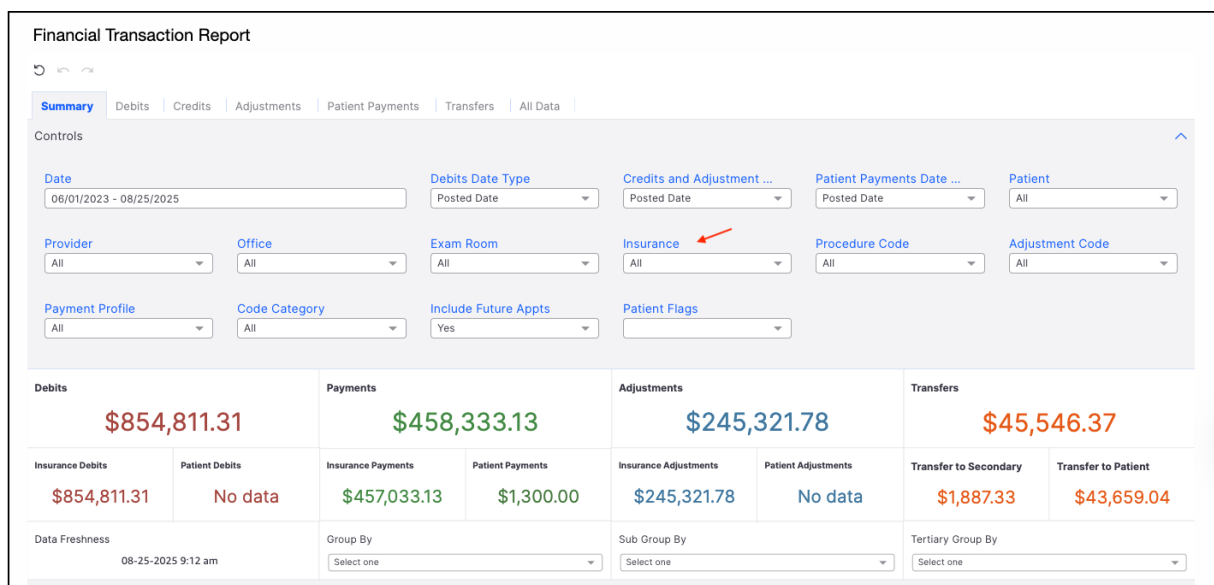
Included in the Financial Transactions report is the option to run a report for a specific insurance.

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.

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: 06/01/2023 - 08/25/2025

Debits Date Type: Posted Date

Credits and ...: Posted Date

Patient Payments...: Posted Date

Patient: All

Provider: All

Office: All

Exam Room: All

Insurance: Aetna, Aetna PP...

Procedure Code: All

Adjustment Code: All

Payment Profile: All

Code Category: All

Include Future ...: Yes

Patient Flags:

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