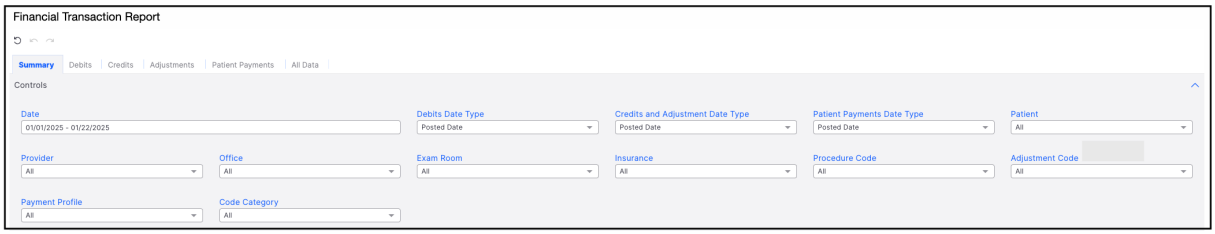
Running reports for Custom Adjustment Reasons

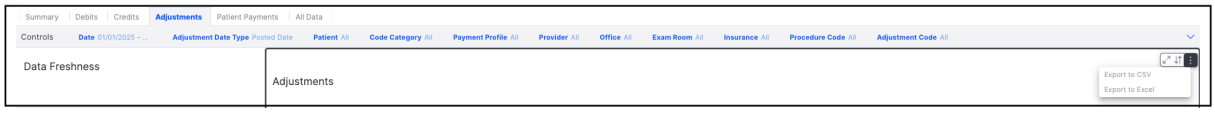
Last modified on 09/28/2026 2:50 pm EDT

To see at a practice, office, provider, patient, payer level, or date range which custom adjustments are taking, you can run a report under Financial Transactions.

1. Navigate to **Billing > Financial Transactions**.
2. While on the Summary tab, set the parameters for your report. You can select a date range, patient, provider, office, exam room, insurance payer, procedure code, or a specific adjustment code.



3. Once selected, the report will generate.
4. To drill down into the adjustment code specifics, navigate to the **Adjustment tab**.



5. You can maximize the screen, sort the information, or export to CVS or MS Excel by hovering in the right corner of the tab.