

# Running reports for Custom Adjustment Reasons

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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.

The screenshot shows the 'Financial Transaction Report' interface. At the top, there are tabs for 'Summary', 'Debits', 'Credits', 'Adjustments', 'Patient Payments', and 'All Data'. Below the tabs is a 'Controls' section with several dropdown menus for filtering the report. The 'Date' dropdown is set to '01/01/2025 - 01/22/2025'. Other dropdowns include 'Debits Date Type', 'Credits and Adjustment Date Type', 'Patient Payments Date Type', 'Patient', 'Provider', 'Office', 'Exam Room', 'Insurance', 'Procedure Code', 'Adjustment Code', 'Payment Profile', and 'Code Category'. All dropdowns are currently set to 'All'.

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

The screenshot shows the 'Adjustments' report tab. The top navigation bar includes 'Summary', 'Debits', 'Credits', 'Adjustments', 'Patient Payments', and 'All Data'. The 'Adjustments' tab is active. Below the navigation bar, there are several dropdown menus for filtering the report, including 'Date', 'Adjustment Date Type', 'Posted Date', 'Patient', 'Code Category', 'Payment Profile', 'Provider', 'Office', 'Exam Room', 'Insurance', 'Procedure Code', and 'Adjustment Code'. The 'Adjustment Code' dropdown is currently set to 'All'. In the bottom right corner, there are buttons for 'Export to CSV' and 'Export to Excel'.

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.