

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 various filters: 'Date' (01/01/2025 - 01/22/2025), '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), and 'Code Category' (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 filters for 'Date' (01/01/2025 - ...), 'Adjustment Date Type' (Posted Date), 'Patient' (All), 'Code Category' (All), 'Payment Profile' (All), 'Provider' (All), 'Office' (All), 'Exam Room' (All), 'Insurance' (All), 'Procedure Code' (All), and 'Adjustment Code' (All). The main content area shows 'Data Freshness' and 'Adjustments'. 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.