

# Financial Transactions Report: Transfers

Last modified on 02/09/2026 1:48 pm EST

The sixth tab listed under the Financial Transactions Report (Day Sheet) is the Transfers tab. Here is where you can see appointments that have been transferred to patient responsibility and to a secondary payer.

As with other sections of the report, there are multiple options to drill into your practice data. They include:

- Date Range
- Transfer Date Type
- Patient
- Code Category
- Payment Profile
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code
- Include Future Appointments
- Trace Number
- Transfer Type

The screenshot shows the 'Financial Transaction Report' interface with the 'Transfers' tab selected. Below the navigation tabs (Summary, Debits, Credits, Adjustments, Patient Payments, Transfers, All Data), there is a 'Controls' section. This section contains several dropdown menus for filtering the report data:

- Date:** 09/01/2024 - 09/03/2025
- Transfer Date Type:** Posted Date
- Patient:** All
- Code Category:** All
- Payment Profile:** All
- Provider:** All
- Office:** All
- Exam Room:** All
- Insurance:** All
- Procedure Code:** All
- Include Future Appts:** Yes
- Trace Number:** All
- Transfer Type:** All

Once your parameters are set, the report will generate automatically.

Financial Transaction Report

Summary

Debits

Credits

Adjustments

Patient Payments

Transfers

All Data

Controls

Date

06/01/2023 - 08/25/2025

Transfer Date Type

Posted Date

Patient

All

Code Category

All

Payment Profile

All

Provider

All

Office

All

Exam Room

All

Insurance

All

Procedure Code

All

Include Future Appts

Yes

Trace Number

All

Transfer Type

All

Data Freshness

08-25-2025 9:12 am

Group By

Reason Code

Transfers Group By Summary

Rows	Count	Adjustment ...
-1	2	\$2,197.26
2	1,114	\$43,349.11
Total	1,116	\$45,546.37

Transfers

Filter Date	Patient Fullname	Date of Service	Provider Name	Insurance Name	Payer ID	Adjustment Amount	Adjustment Reas
Jun 1, 2023		May 31, 2023		Cigna	62308	\$20.84	2: Coinsurance Ar
Jun 1, 2023		May 31, 2023		Cigna	62308	\$0.27	2: Coinsurance Ar
Jun 1, 2023		May 31, 2023		Cigna	62308	\$357.44	2: Coinsurance Ar
Jun 1, 2023		May 31, 2023		Cigna	62308	\$5.09	2: Coinsurance Ar
Jun 2, 2023		May 23, 2023		Cigna	62308	\$17.44	2: Coinsurance Ar
Jun 2, 2023		May 23, 2023		Cigna	62308	\$4.45	2: Coinsurance Ar
Jun 2, 2023		May 30, 2023		Aetna	60054	\$11.21	2: Coinsurance Ar
Jun 2, 2023		May 30, 2023		Aetna	60054	\$6.28	2: Coinsurance Ar
Jun 2, 2023		May 30, 2023		Aetna	60054	\$0.68	2: Coinsurance Ar
Jun 2, 2023		May 30, 2023		FL BCBS	58590	\$9.53	2: Coinsurance Ar

Hovering in the right corner of the report will expose additional options. The diagonal arrows will maximize the report on your screen. The vertical arrows will allow you options to sort the information. Export options are under the three vertical dots. The exported report will be available in your downloads.

Include Future ...

Yes

↖ ↗

↕

⋮

Adjustment Amount

Adjustment Reas