Financial Transactions Report: Transfers

Last modified on 10/05/2026 11:49 am EDT

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

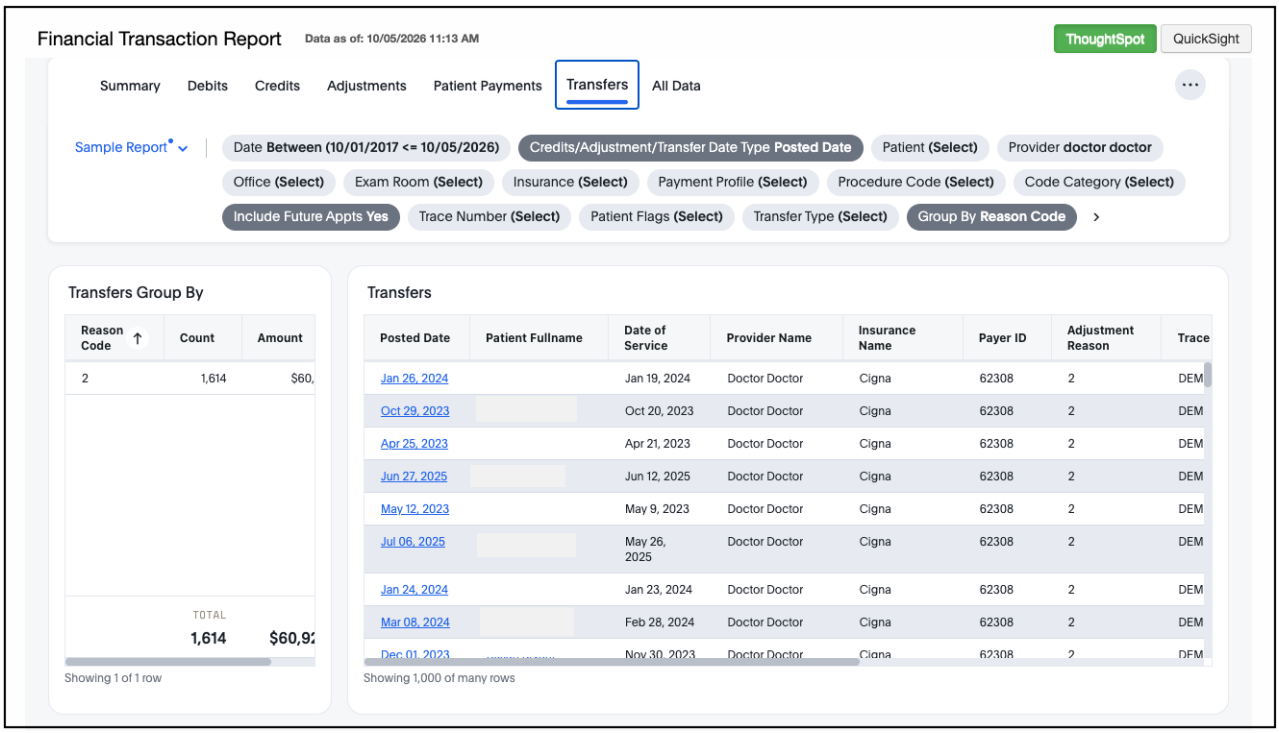
The controls available include:

- Date or Date Range
- Debits Date Type
- Credits/Adjustment/Transfer Date Type
- Patient Payment Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Payment Profile
- Procedure Code
- Adjustment Code
- Code Category
- Include Future Appts
- Include Moved Cash
    - Select **Yes** if you want to view revenue listed for a certain period (could include payments that were originally posted on one day and then moved to a different posted date)
    - Select **No** if you want to view revenue by the original posted date, perhaps to verify against bank deposits
- Billed To
- Trace Number
- Adjustment Type
- Patient Flags
- Transfer Type

Options to group and view the information include:

- Debit Group By
- Group By
- Sub Group By
- Tert Group By
- Credit Group By
- Payment Group By
- Credit Date Type
- Transfer Group By

Once the parameters and group-by parameters are set, the report will populate. The left column will include a summary, and the detailed information will be listed to the right.



Hover over the top-right corner of the report to access options to view the underlying data, download the information, or maximize the view for presentation mode.

