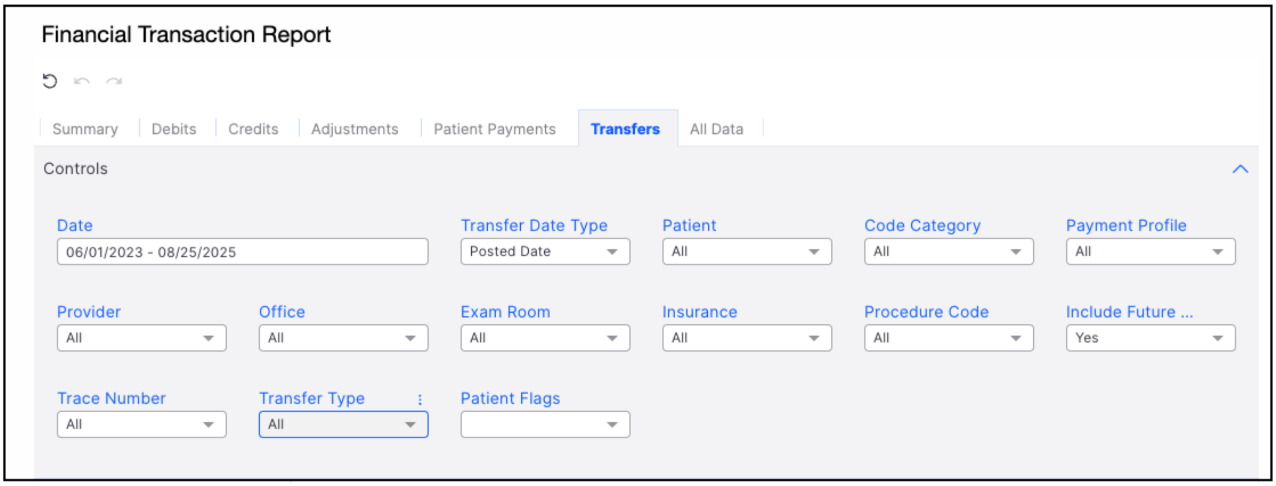
Financial Transactions Report: Transfers

Last modified on 08/27/2025 9:02 am EDT

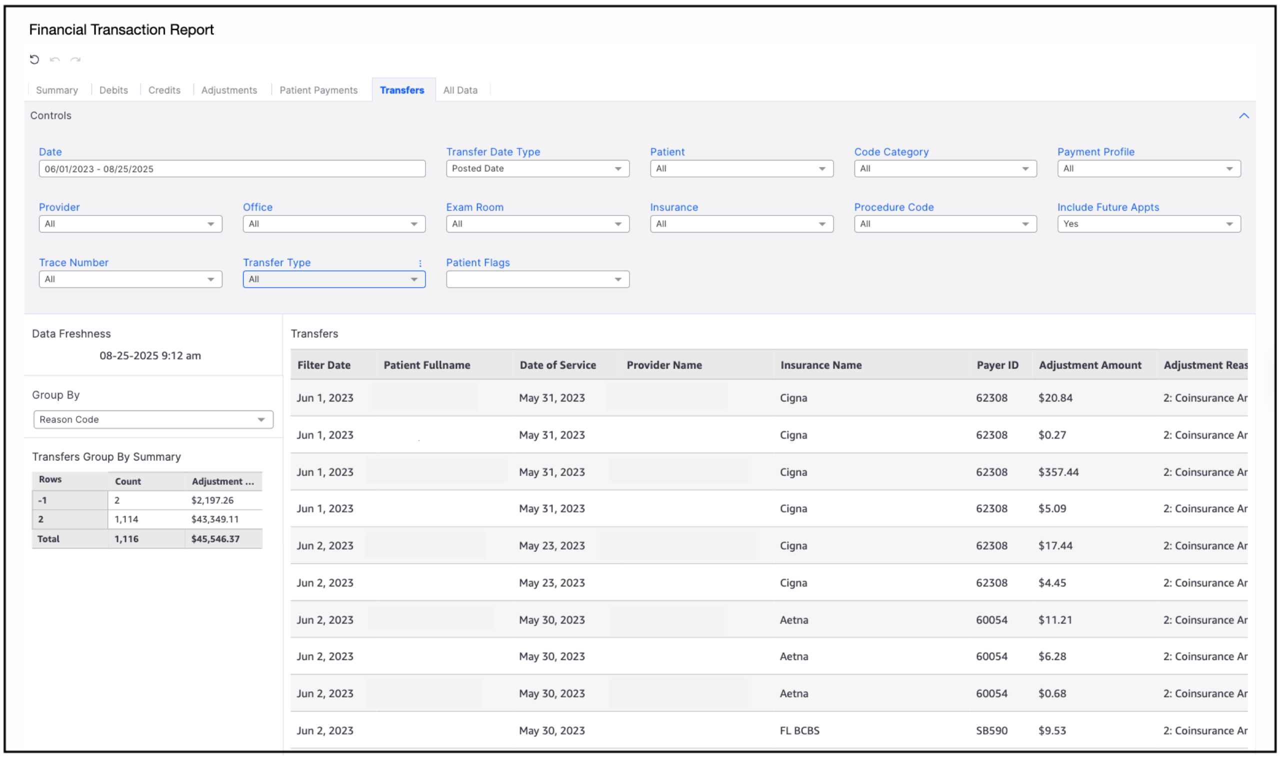
The sixth tab listed under the Financial Transactions Report (Day Sheet) is the Transfers tab. Here is where you can see appointments that have been transferred to patient responsibility and to a secondary payer.

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
- Patient Flags



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



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.