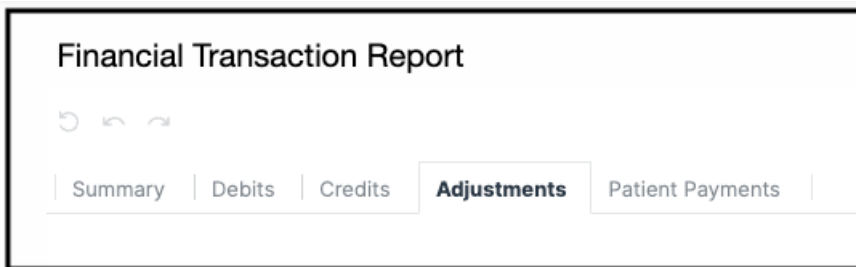


Financial Transactions (fka Day Sheet) Updates: Adjustments tab

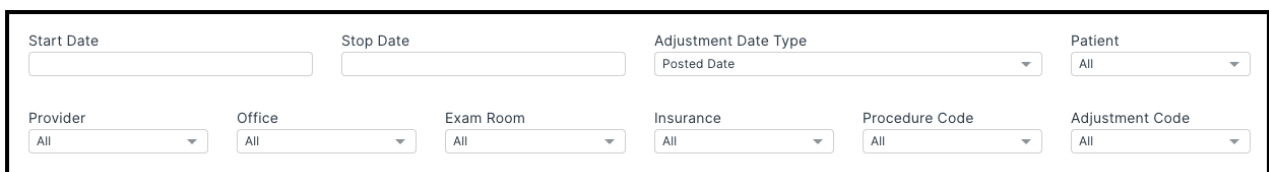
07/24/2024 2:40 pm EDT

The fourth tab listed under the Financial Transactions (fka Day Sheet) is the Adjustments tab. Here is where you can see charges added for the parameters you set.

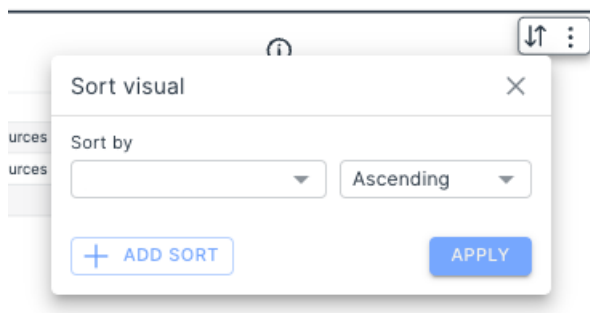


The controls available include:

- Start Date
- Stop Date
- Adjustment Date Type
- Patient
- Provider
- Office
- Exam Room
- Insurance
- Procedure Code
- Adjustment Code

A screenshot of the filter controls for the report. It consists of two rows of input fields. The first row contains: "Start Date" (text input), "Stop Date" (text input), "Adjustment Date Type" (dropdown menu with "Posted Date" selected), and "Patient" (dropdown menu with "All" selected). The second row contains: "Provider" (dropdown menu with "All" selected), "Office" (dropdown menu with "All" selected), "Exam Room" (dropdown menu with "All" selected), "Insurance" (dropdown menu with "All" selected), "Procedure Code" (dropdown menu with "All" selected), and "Adjustment Code" (dropdown menu with "All" selected).

Once you have set your parameters, the report will populate. You can use the up/down arrow on the right side to sort the information in numerous ways.



You can also export the report to CSV or Excel by clicking the 3 vertical dots. The report will be generated and available in your message center.

Menu options

A screenshot of a software interface showing a menu. The menu is open, displaying three options: "Unpin totals", "Export to CSV", and "Export to Excel". The menu is triggered by a button with a double-headed vertical arrow and a vertical ellipsis. To the left of the menu, there is a table with a header "edure" and two rows, each with the number "13".

edure
13
13