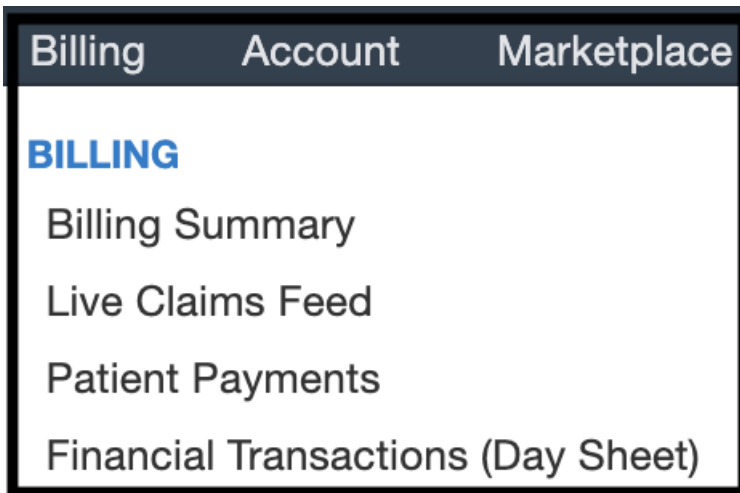


How do I Run a Report for a Specific Payment Method?

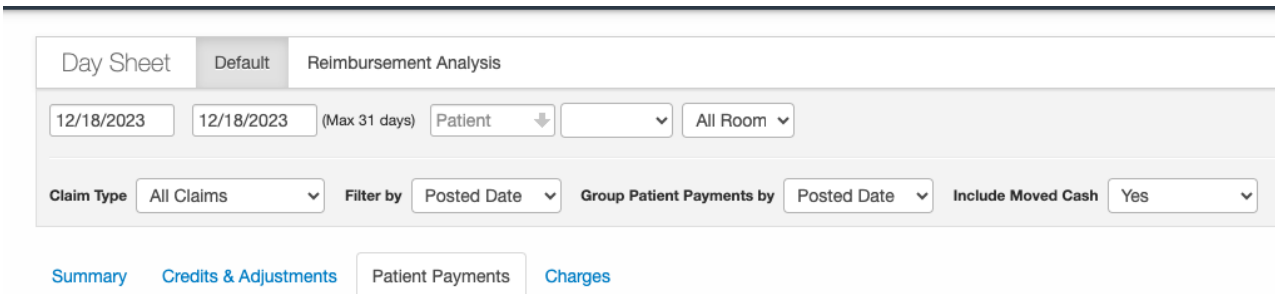
07/24/2024 3:30 pm EDT

To get a report on different Patient Payment methods, please follow the steps outlined below:

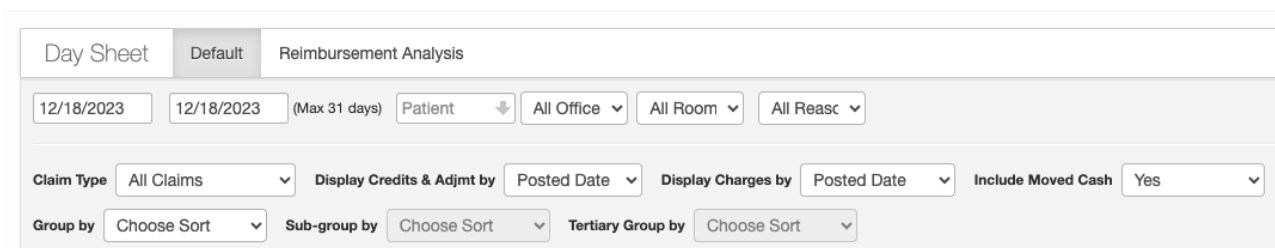
1. Navigate to **Billing** and select **Financial Transactions (Day Sheet)**.



2. Enter the Date range and click on the **Patient Payment** tab.

A screenshot of the 'Day Sheet' report interface. At the top, there are three tabs: 'Day Sheet', 'Default', and 'Reimbursement Analysis'. The 'Day Sheet' tab is selected. Below the tabs, there are several filter fields: '12/18/2023' (start date), '12/18/2023 (Max 31 days)' (end date), 'Patient' (dropdown), and 'All Room' (dropdown). Below these, there are more filters: 'Claim Type' (All Claims), 'Filter by' (Posted Date), 'Group Patient Payments by' (Posted Date), and 'Include Moved Cash' (Yes). At the bottom, there are four tabs: 'Summary', 'Credits & Adjustments', 'Patient Payments', and 'Charges'. The 'Patient Payments' tab is selected.

3. Under **Group Patient Payment by** Select **Method**.

A screenshot of the 'Day Sheet' report interface, similar to the previous one but with different filter settings. The 'Day Sheet' tab is selected. The filter fields are: '12/18/2023' (start date), '12/18/2023 (Max 31 days)' (end date), 'Patient' (dropdown), 'All Office' (dropdown), 'All Room' (dropdown), and 'All Reasc' (dropdown). Below these, there are more filters: 'Claim Type' (All Claims), 'Display Credits & Adjmt by' (Posted Date), 'Display Charges by' (Posted Date), and 'Include Moved Cash' (Yes). At the bottom, there are three tabs: 'Group by' (Choose Sort), 'Sub-group by' (Choose Sort), and 'Tertiary Group by' (Choose Sort).

4. Click on **Update**.

5. If you want to export the data, click the green **Action** button and select **Export Current Selection**. The report will generate and appear in your message center.

Action ▾

- Print All
- Print Current Section
- Export All to File
- Export Current Section**