Patient Analysis Report

Last modified on 11/06/2026 1:40 pm EST

The **Patient Analysis** report provides comprehensive insight into patient volume and population metrics across an organization. Data can be viewed at the organizational level or filtered by office location, provider, or appointment type to support more detailed analysis.

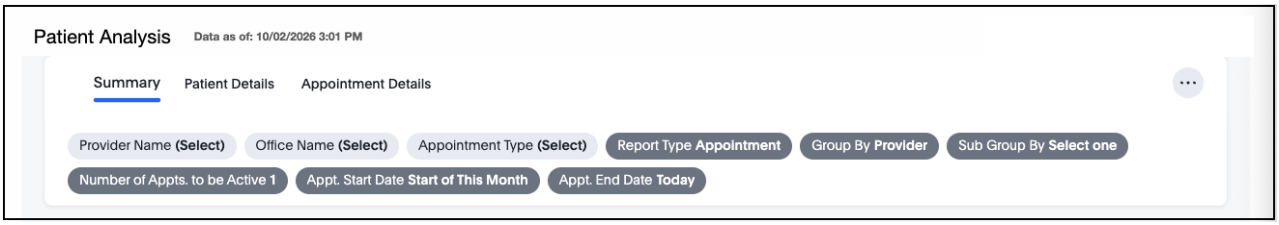
Key Metrics Include:

- **Insurance status:** Distribution of insured and self-pay patients
- **Patient activity status:** Active and inactive patient populations
- **Insurance breakdown:** Insurance coverage within the active patient population
- **Patient acquisition:** New patients compared to established patient visits

Summary | Save View | Patient Details | Appointment Details | Video Walkthrough

Summary

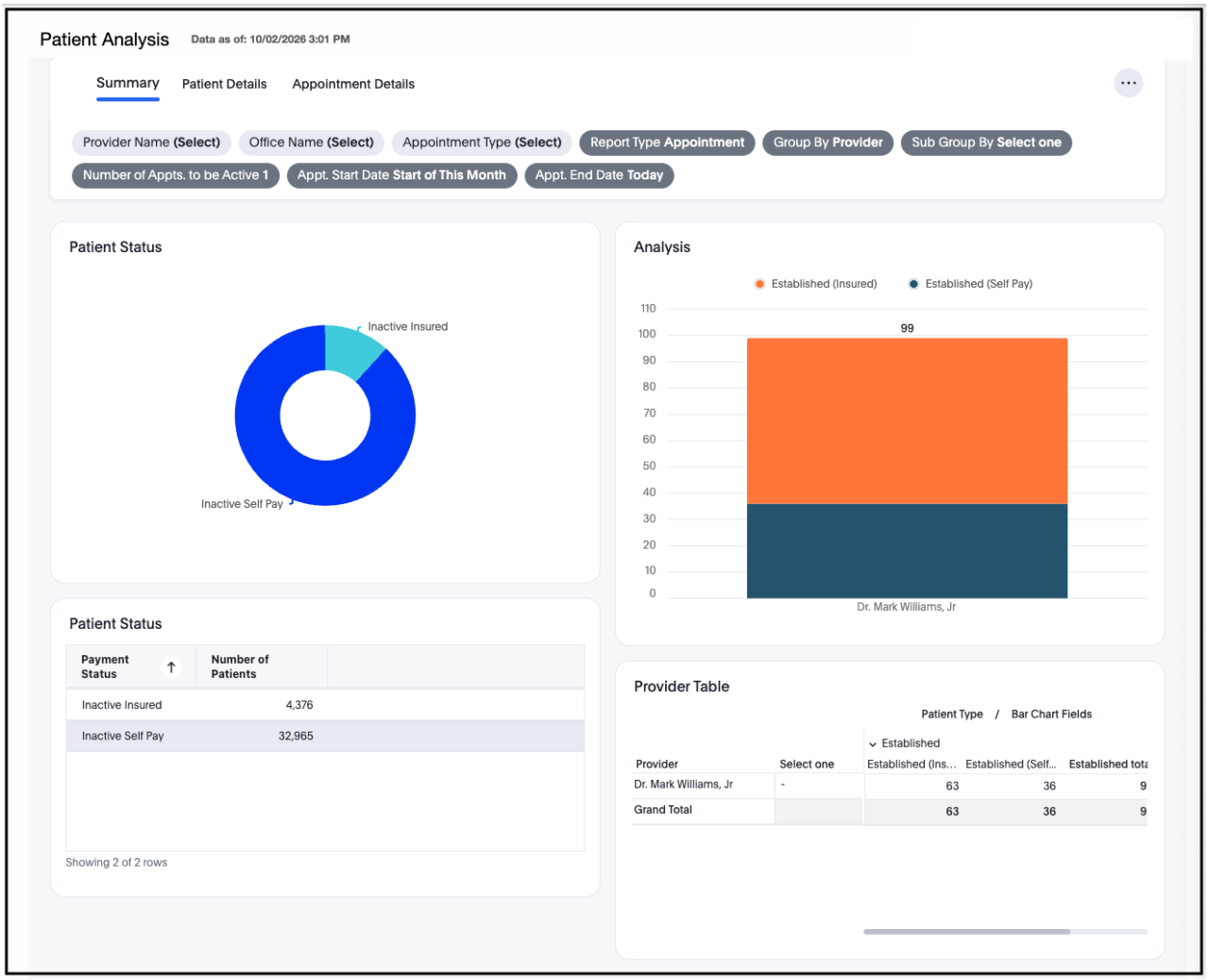
The summary tab of the patient analysis report shows high-level parameters related to your patient base. You can set several parameters to drill down to a specific provider, office, appointment type, or appointment date range.



Parameters include:

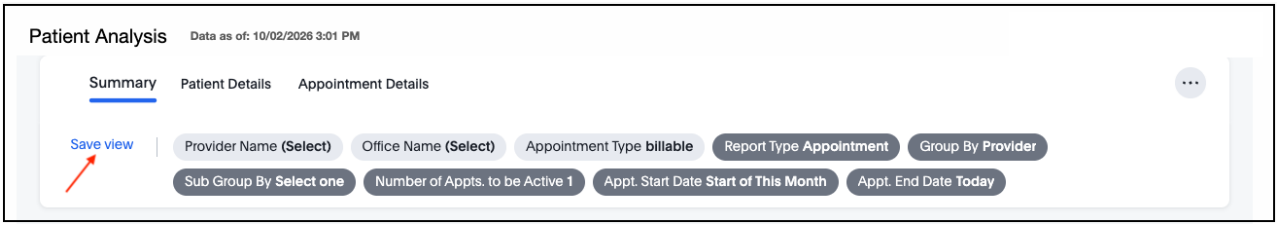
- Provider Name - Select one, multiple, or all providers
- Office Name - Select one, multiple, or all offices
- Appointment Type - Select Billable, Rescheduled/Cancelled/No-Show, or all
- Report Type - Select Appointment or Patient
- Number of Appts to be Active - Select the minimum number of appointments to be considered active
- Appointment Start Date
- Appointment End Date

Once set, the system will display graphs that show the information that meets the selected parameters.

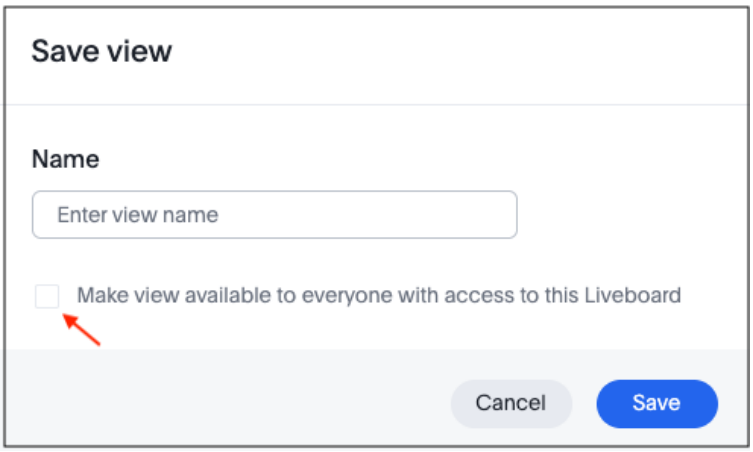


Save View

To save the filters set, press **Save View** on the left side of the screen.

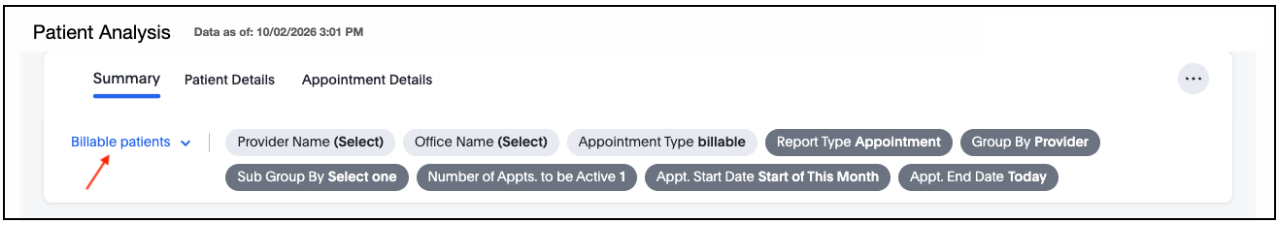


Enter a name for the view when prompted. To share the view with colleagues, check the box next to **Make view available to everyone with access to this Liveboard**.



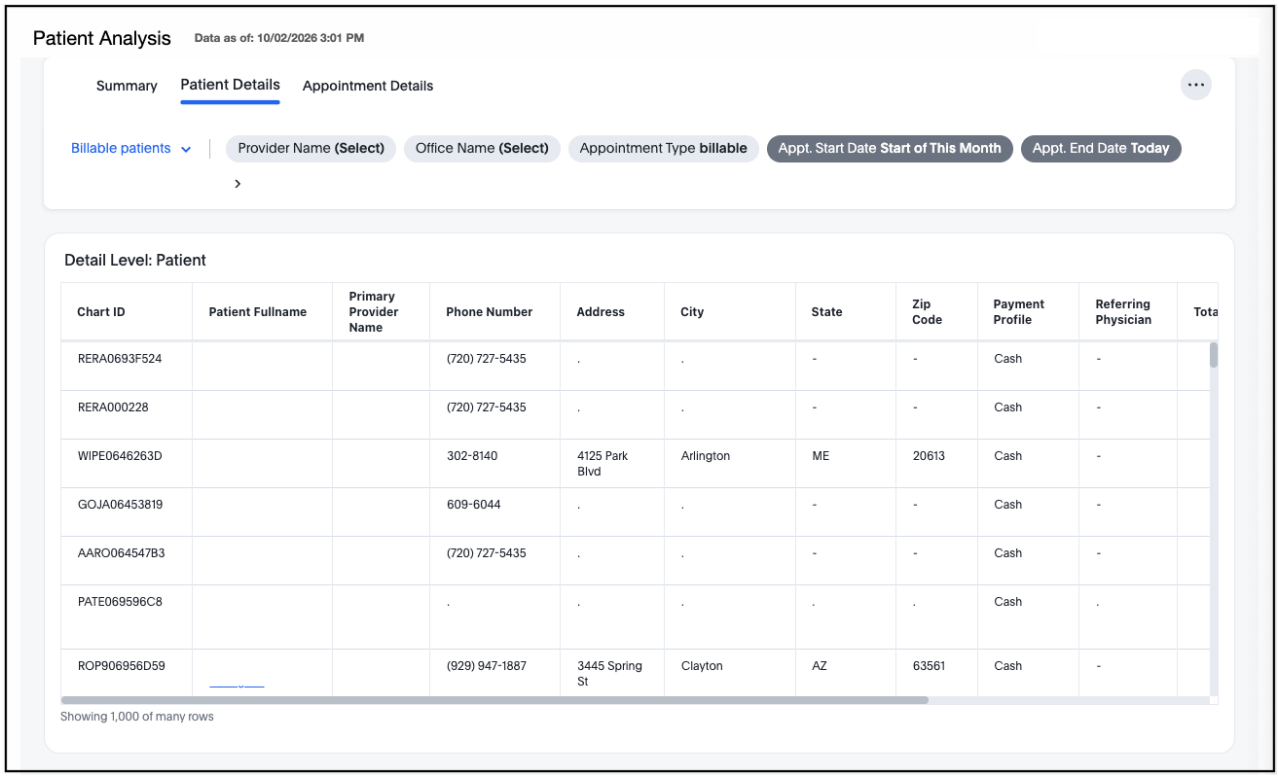
Saved views preserve all filter selections, including date type and grouping. They do not save a specific date range.

To rerun the report, select it from the left side of the screen. If it doesn't show, press the down arrow to view additional saved views.

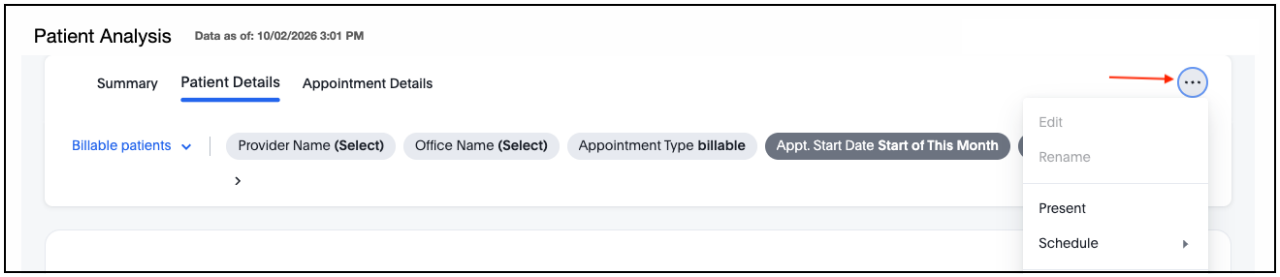


Patient Details

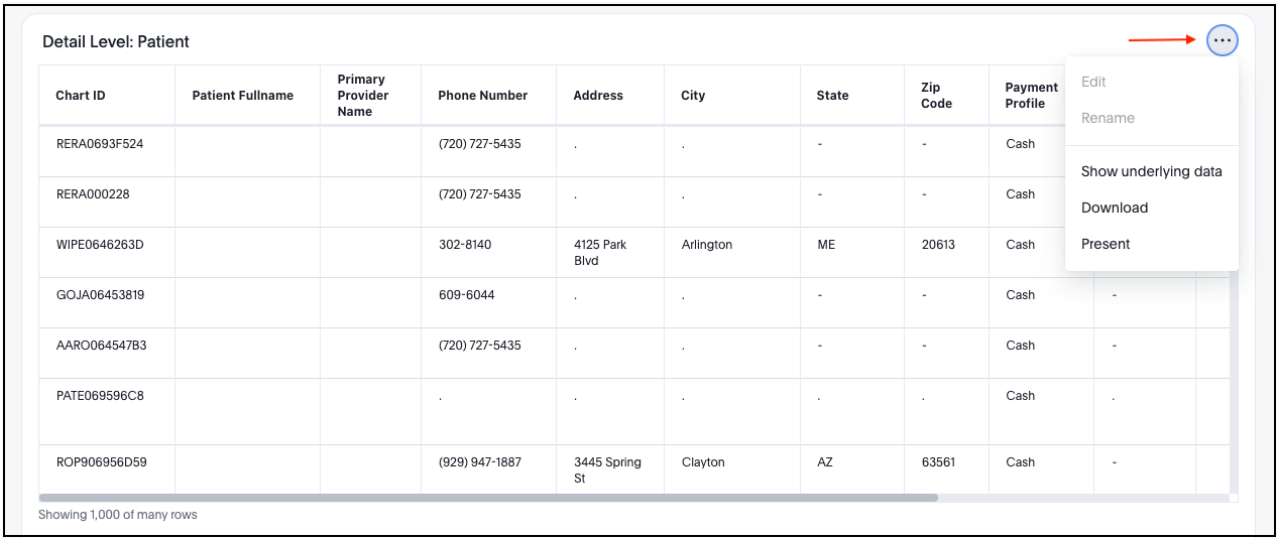
The details tab of the patient analysis report shows detailed information related to the parameters specified on the summary tab.



Press the three horizontal dots in the upper right corner of the top tile to expose options to schedule the report to run on a preset cadence and to display the information in presentation mode.

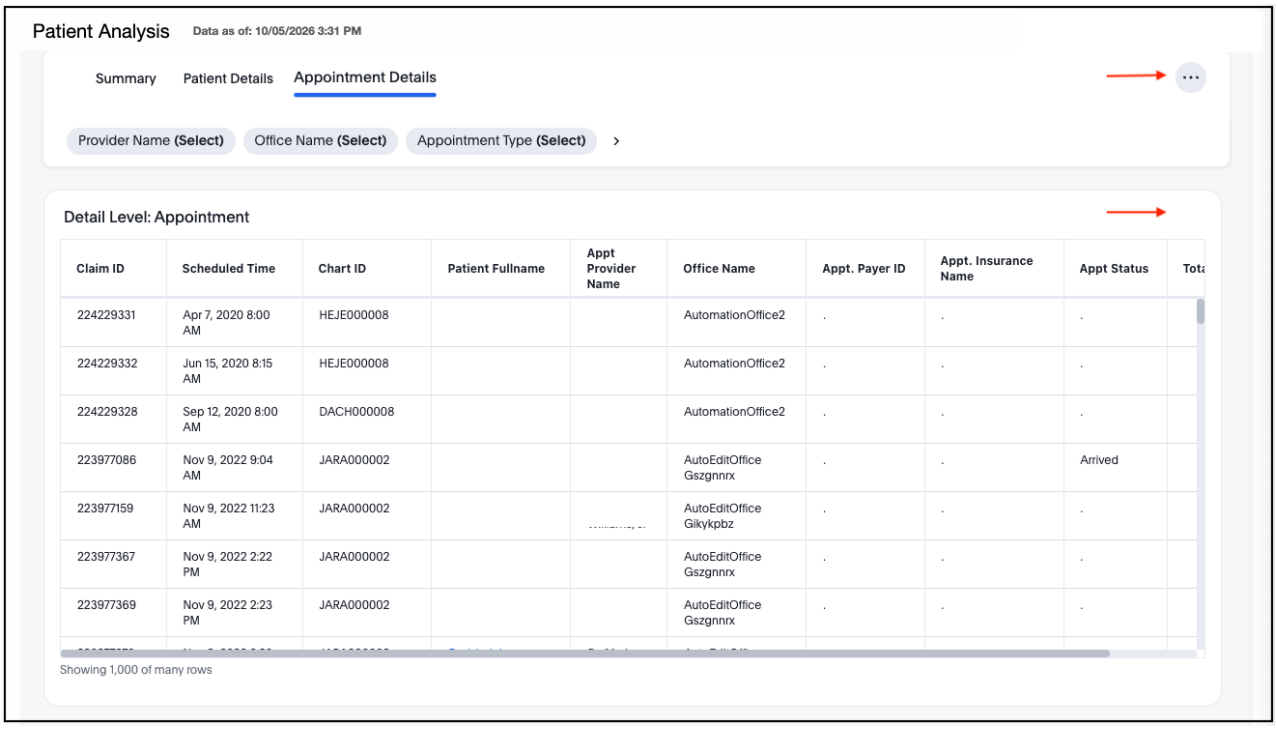


Press the three horizontal dots in the upper right corner of the Detail Level: Patient tile to expose options to show the underlying data, download the report, and to display in presentation mode.



Appointment Details

Press the three horizontal dots in the upper right corner of the Appointment Details and Detail Level: Appointment tiles to expose options to show the underlying data, download the report, and to display in presentation mode.



Video Walkthrough