

# Patient Analysis Report

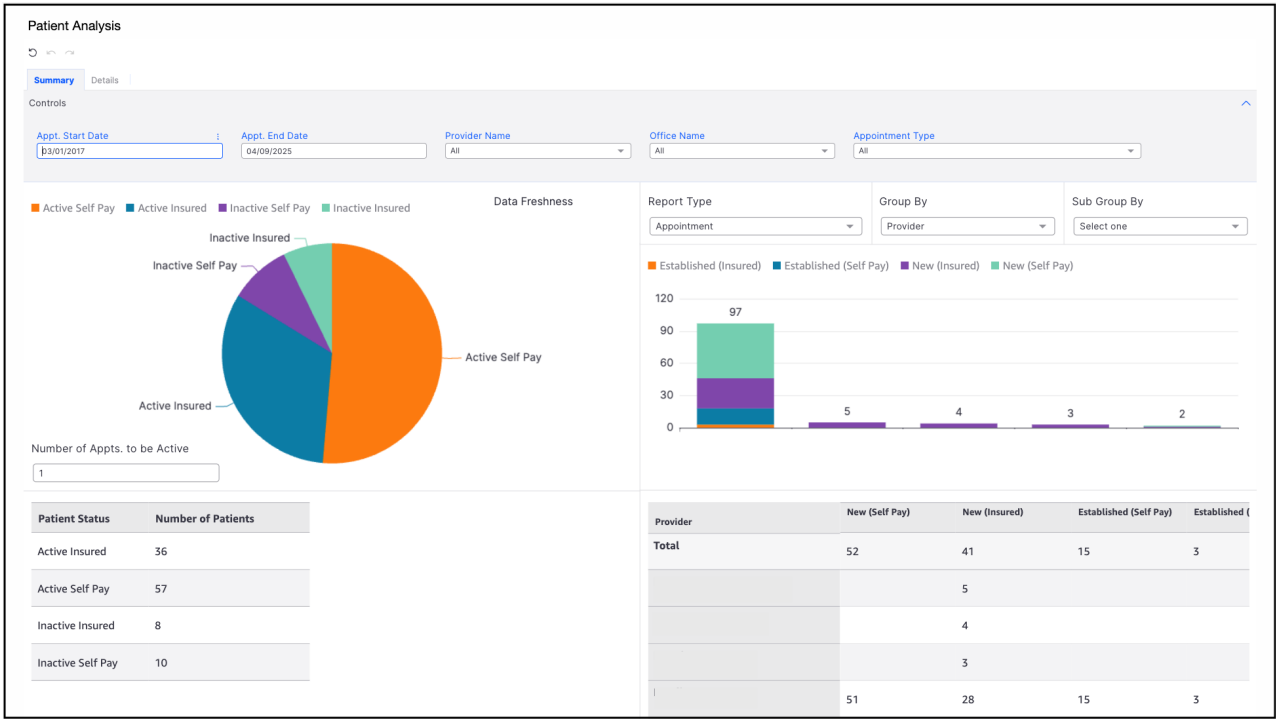
Last modified on 10/06/2025 2:48 pm EDT

The Patient Analysis Report provides comprehensive insights into patient volume metrics across your organization. This report offers flexible viewing options, allowing you to analyze data at the organizational level or segment it by office location, provider, or appointment type.

Key Metrics Include:

- Insurance status distribution (insured versus self-pay patients)
- Patient activity status (active versus inactive)
- Insurance breakdown within the active patient population
- New patient acquisition compared to established patient visits

[Summary](#) | [Details](#) | [Video Walkthrough](#)



## Summary

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

Patient Analysis

Summary

Details

Controls

Appt. Start Date

12/01/2024

Appt. End Date

01/08/2025

Provider Name

All

Office Name

All

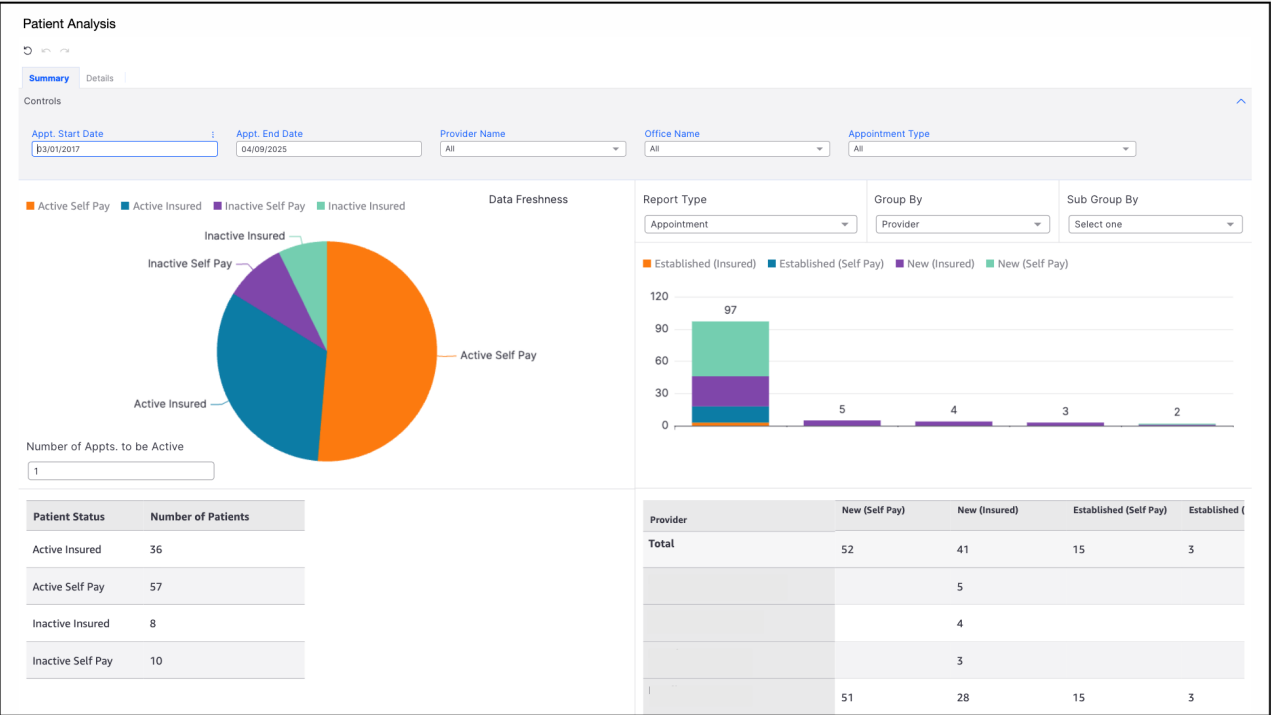
Appointment Type

All

Parameters include:

- Appointment Start Date
- Appointment End Date
- Provider Name (Can select one, multiple, or all)
- Office Name (Can select one, multiple, or all)
- Appointment Type (Can select Billable, Rescheduled/Cancelled/No-Show, or all)

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



Details

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

**Patient Analysis**

Summary Details

Controls Appt. Start Date 03/01/2017 Appt. End Date 04/09/2025 Provider Name All Office Name All Appointment Type All

Detail Level Patient

Chart ID	Patient Fullname	Primary Provider Name	Phone Number	Address	City	State	Zip Code	Payment Profile	Total Appts.	Total Duration
								Insurance	1	30
								Cash	1	30
								Cash	1	30
								Auto Accident	3	90
								Cash	2	105
								Cash	1	75
								Cash	1	30
								Cash	4	180
								Cash	3	120
								Cash	1	30
								Cash	5	320
								Cash	1	30

The information can be maximized by selecting the diagonal arrows on the right side of the screen. The visual can be sorted by selecting the up/down arrows, and the information can be exported to MS Excel or CSV by selecting the three horizontal dots.

Summary Details

Controls Appt. Start Date 12/01/2022 Appt. End Date 01/09/2025 Provider Name All Office Name All Appointment Type All

Detail Level Patient

Chart ID	Patient Fullname	Primary Provider Name	Phone Number	Address	City	State	Zip Code	Payment Profile	Total Appts.	Total Duration
SASAO00002	Sample Sam							Cash	1	30
ADTI000001	Tina Adams							Insurance	4	120
BRMI000001	Michael Brown							Insurance	1	30

You can select to view the information by patient or appointment by selecting the drop-down under the Detail Level header.

**Patient Analysis**

Summary Details

Controls Appt. Start Date 12/01/2022 Appt. End Date 01/09/2025

Detail Level

Patient

Search value

Appointment

Patient

There are additional options to view the results under each of the report headers. Hover over the header to see each available option. Under the Patient Fullname header, you have options to sort, freeze the column, or freeze up to the column.

## Video Walkthrough

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