

Patient Analysis: Summary Tab

Last modified on 04/09/2025 11:13 am EDT

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 show you graphs that display the information that meets the parameters selected.

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

Legend: Active Self Pay (Orange), Active Insured (Blue), Inactive Self Pay (Purple), Inactive Insured (Green)

Data Freshness

Number of Appts. to be Active: 1

Patient Status	Number of Patients
Active Insured	36
Active Self Pay	57
Inactive Insured	8
Inactive Self Pay	10

Report Type: Appointment Group By: Provider Sub Group By: Select one

Legend: Established (Insured) (Orange), Established (Self Pay) (Blue), New (Insured) (Purple), New (Self Pay) (Green)

Provider	New (Self Pay)	New (Insured)	Established (Self Pay)	Established (Insured)
Total	52	41	15	3
		5		
		4		
		3		
	51	28	15	3