

Patient Analysis: Details Tab

Last modified on 04/09/2025 11:20 am EDT

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

Patient Analysis

SummaryDetails

ControlsAppt. Start Date03/01/2017Appt. End Date04/09/2025Provider NameAllOffice NameAllAppointment TypeAll

Detail LevelPatient

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.

SummaryDetails

ControlsAppt. Start Date12/01/2022Appt. End Date01/08/2025Provider NameAllOffice NameAllAppointment TypeAll

Detail LevelPatient

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

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.

Detail Level

Patient

Chart ID	Patient Fullname
SASA000002	
ADTI000001	

Sort by

az

za

Patient Fullname >

Freeze column

Freeze up to this column