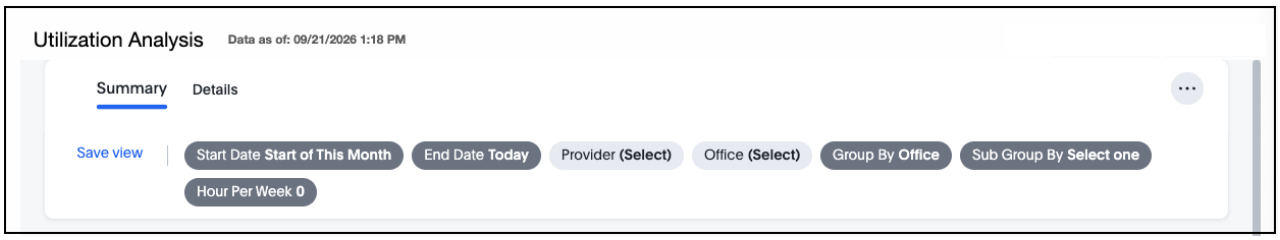
Utilization Analysis Report: Summary Tab

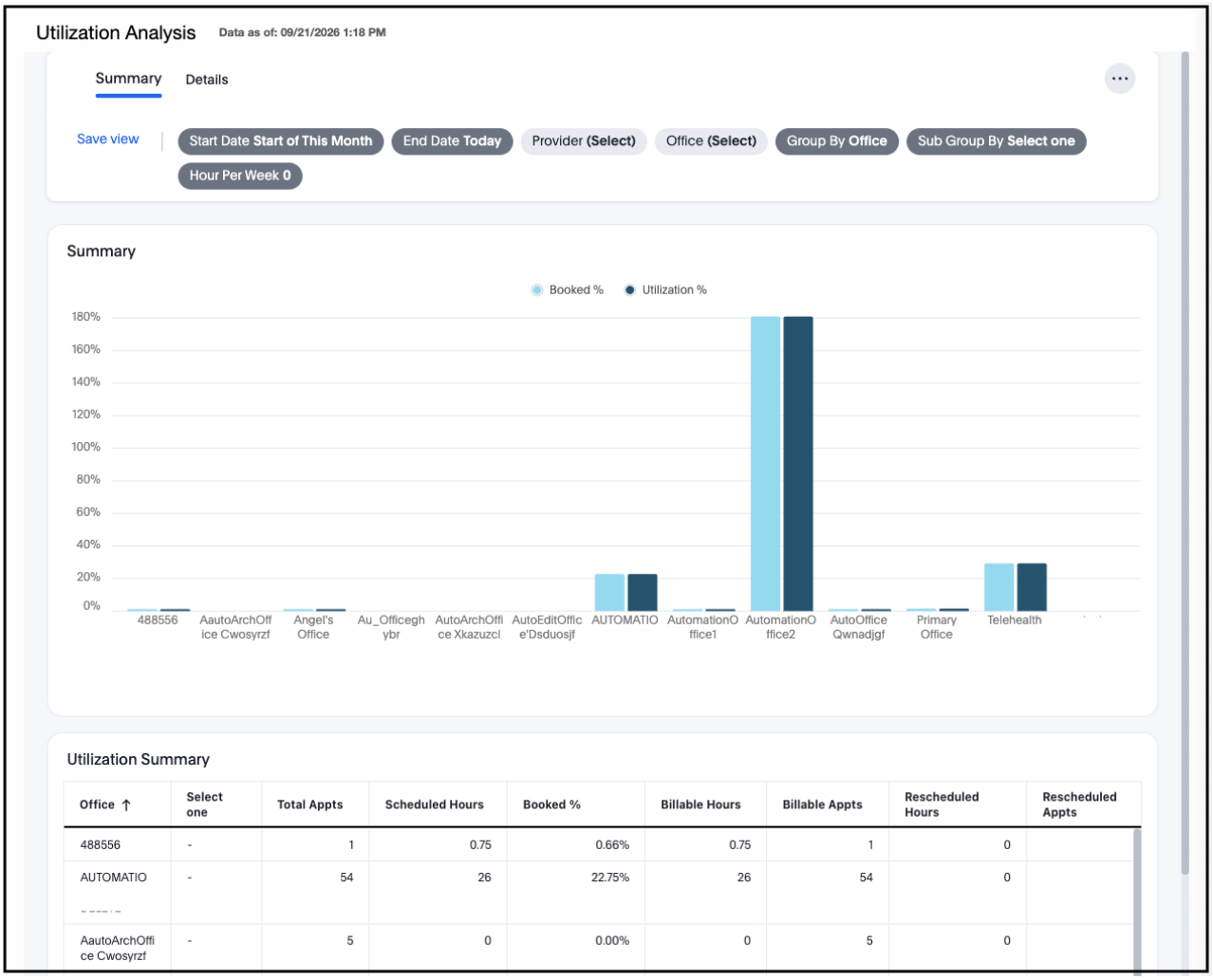
Last modified on 11/10/2026 11:25 am EST

The Summary tab on the Utilization Analysis Report is where the parameters for the report are set. Options include:

- Start Date
- End Date
- Provider (single, multiple, or all)
- Office (single, multiple, or all)
- Hour(s) per Week

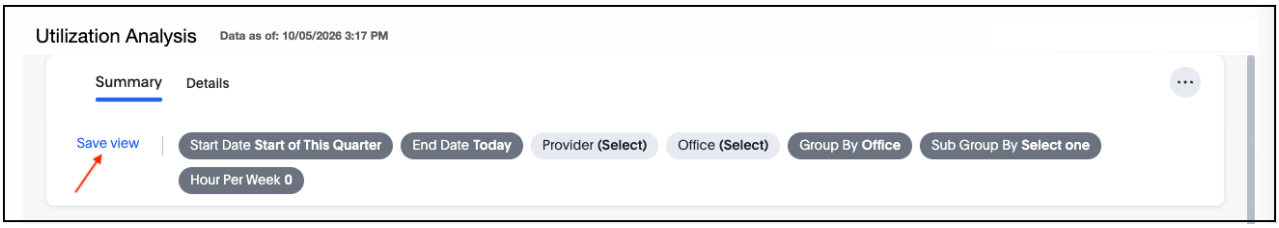


The report can be grouped and sub-grouped by several different parameters, giving additional flexibility to refine the report further. They include: Provider, Office, Exam Room, or Referring Provider.

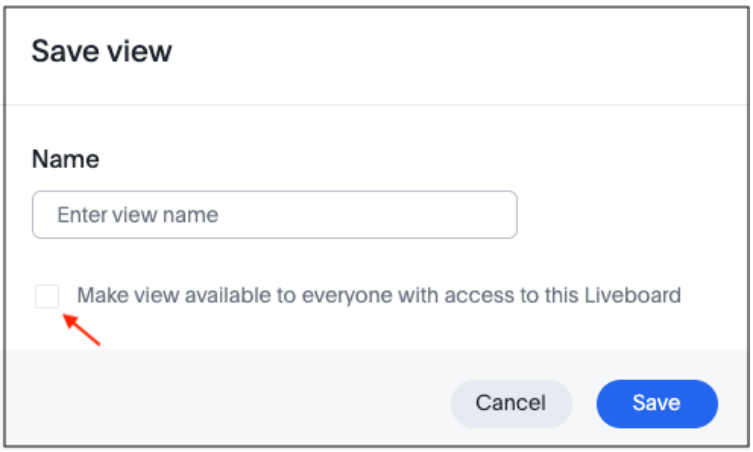


Save View

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.

