

# Practice Analytics: Overview

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Version 21.3

## About

### Path: Tools > Reporting






The Practice Analytics module offers a collection of reports and dashboards to make information easier to read and more interactive. You can now find a visual summary at the beginning of most reports to easily make sense of the information presented by them. Features like drilling down and applying filters are a couple of clicks away. You can interact with the information to focus on specific indicators and then export the result or save your changes without altering the original report using bookmarks. This article will go over:

- [Benefits](#)
- [Security Permissions and Setup Requirements](#)
- [Report Categories](#)
- [Report Layout](#)
- [Learn More](#)

## Benefits


OP's Practice Analytics are made up of dozens of user-friendly reports and dashboards, and they offer the insights your practice needs: neatly packaged and easily accessible, all from one centralized location.


While various reports in OP have been centralized under Practice Analytics, the originals will continue to exist under each of their respective areas; however there are several advantages to using Practice Analytics, including less clicks to access the data you need, the ability to drill-down into data, and more:

				
A <b>visual summary</b> section is now at the top of each report, giving high-level insights for the user	Much <b>larger data sets</b> can be run and presented - up to 1 million rows, without the wait or risk of timeout!	The data is presented in a more <b>user-friendly</b> way, especially for less experienced users	Reports types are grouped together <b>more intuitively</b> , so it's easier for users to find what they need	Report parameters built by members of a practice's staff can <b>easily be bookmarked</b> for future use

## Security Permissions and Setup Requirements

In order to access the Practice Analytics module, the user must meet the following requirements:

- Have the `Tools_Reporting` permission . Follow these steps to grant the permission
  1. Go to **Admin > Security Administration**.
  2. Select the user from the left column.
  3. Select the `Tools_Reporting` permission.
  4. Grant the permission by clicking the **Left Arrow**  button.
  5. Click **Close**.

- Have an email set up. Follow these steps to set the user's email:
  1. Go to **Practice Management > Staff/Providers**.
  2. Enter the search criteria in the **Staff Search** field.
  3. Click **Search**.
  4. Select the user from the left column.
  5. Click the **Address Book**  button.
  6. Go to the **Address** tab.
  7. Enter the **Email address 1** if necessary.
- If you are an On-Premise Practice:
  1. OP must be on **version 21.3.53** or above.
  2. **Microsoft Edge WebView2 Runtime application** must be installed on all workstations. See [this article](#) for more information on installing.

## Report Categories

You can find the Practice Analytics Module in **Tools > Reporting**. OP shows a categorized list of reports with the following categories:

- Scheduling Reports
- Daily Reports
- Daysheet Dependent
- Monthly Reports
- Accounts Receivable Aging Analysis
- Historical AR Aging Analysis
- Analytics

You can switch between report and dashboard tabs either by clicking the Report and Financial Analytics buttons respectively at the top, or clicking the tabs at the bottom. Dashboards are a paid feature, however, a free dashboard is available under the Analytics category in the Reports tab. If you want to unlock other dashboards for your practice, contact your account manager.

The Financial Analytics tab, available as a contracted feature, contains the following categories:

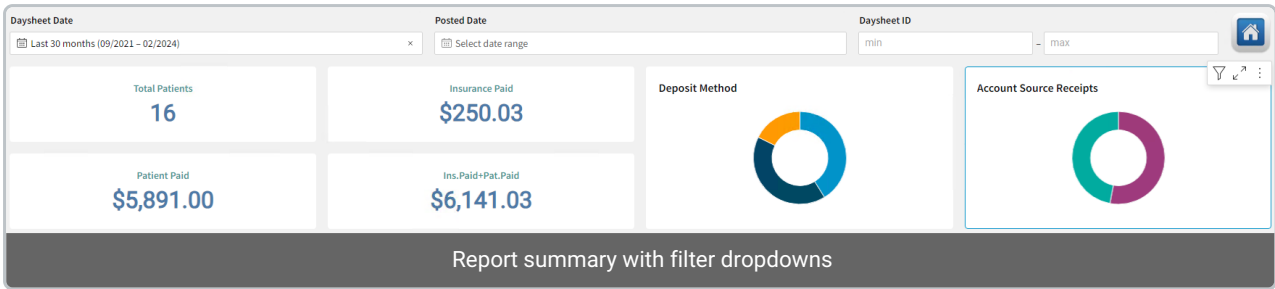
- Appointment Dashboards
- Worklist Dashboard
- Key Performance Indicators (KPI)
- General Dashboards

## Report Layout

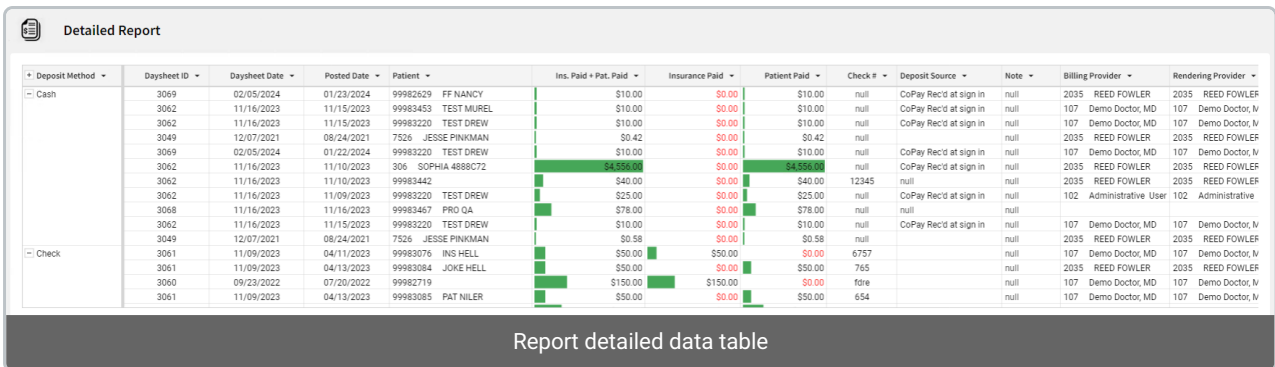
The information displayed when selecting a report depends on its type:

- **Summarized Report:** Displays a summary of the report with KPIs and, in some cases, a graph above of the detailed data pivot table. (All reports from the Appointment Dashboards and Worklist Dashboard categories except for Daysheet Log.)
- **Table-only Report:** Displays the report data in a pivot table. (All reports under Accounts Receivable Aging Analysis and Daysheet Log.)
- **Dashboard:** Displays a summary with totals and graphs without the pivot table.

At the top of the report, for summarized and overview reports, OP shows a series of dropdowns containing a list of checkboxes to filter the summary section as well as a home button to return to the report categorized list page.



The Detailed Report section shows all available columns with relevant data. Users have the ability to move and hide columns - see the Visualization section of the [Maximized Elements](#) article for more information.



Deposit Method	Daysheet ID	Daysheet Date	Posted Date	Patient	Ins. Paid + Pat. Paid	Insurance Paid	Patient Paid	Check #	Deposit Source	Note	Billing Provider	Rendering Provider	
Cash	3069	02/05/2024	01/23/2024	99982629	FF NANCY	\$10.00	\$0.00	\$10.00	null	CoPay Rec'd at sign in	null	2035 REED FOWLER	2035 REED FOWLER
	3062	11/16/2023	11/15/2023	99983453	TEST MUREL	\$10.00	\$0.00	\$10.00	null	CoPay Rec'd at sign in	null	107 Demo Doctor, MD	107 Demo Doctor, MD
	3062	11/16/2023	11/15/2023	99983220	TEST DREW	\$10.00	\$0.00	\$10.00	null	CoPay Rec'd at sign in	null	2035 REED FOWLER	2035 REED FOWLER
	3049	12/07/2021	08/24/2021	7526	JESSE PINKMAN	\$0.42	\$0.00	\$0.42	null	CoPay Rec'd at sign in	null	2035 REED FOWLER	2035 REED FOWLER
	3059	02/05/2024	01/22/2024	99983220	TEST DREW	\$10.00	\$0.00	\$10.00	null	CoPay Rec'd at sign in	null	107 Demo Doctor, MD	107 Demo Doctor, MD
	3062	11/16/2023	11/10/2023	306	SOPHIA 4888C72	\$4,556.00	\$0.00	\$4,556.00	null	CoPay Rec'd at sign in	null	2035 REED FOWLER	2035 REED FOWLER
	3062	11/16/2023	11/10/2023	99983442		\$40.00	\$0.00	\$40.00	12345	null	null	2035 REED FOWLER	2035 REED FOWLER
	3062	11/16/2023	11/09/2023	99983220	TEST DREW	\$25.00	\$0.00	\$25.00	null	CoPay Rec'd at sign in	null	102 Administrative User	102 Administrative
	3068	11/16/2023	11/16/2023	99983467	PRO QA	\$78.00	\$0.00	\$78.00	null	null	null	107 Demo Doctor, MD	107 Demo Doctor, MD
	3062	11/16/2023	11/15/2023	99983220	TEST DREW	\$10.00	\$0.00	\$10.00	null	CoPay Rec'd at sign in	null	107 Demo Doctor, MD	107 Demo Doctor, MD
Check	3049	12/07/2021	08/24/2021	7526	JESSE PINKMAN	\$0.58	\$0.00	\$0.58	null	null	2035 REED FOWLER	2035 REED FOWLER	
	3061	11/09/2023	04/11/2023	99983076	INS HELL	\$50.00	\$0.00	\$50.00	6757	null	107 Demo Doctor, MD	107 Demo Doctor, MD	
	3061	11/09/2023	04/13/2023	99983084	JOKE HELL	\$50.00	\$0.00	\$50.00	765	null	2035 REED FOWLER	2035 REED FOWLER	
	3060	09/23/2022	07/20/2022	99982719		\$150.00	\$0.00	\$150.00	fine	null	107 Demo Doctor, MD	107 Demo Doctor, MD	
	3061	11/09/2023	04/13/2023	99983085	PAT NILER	\$50.00	\$0.00	\$50.00	654	null	107 Demo Doctor, MD	107 Demo Doctor, MD	

Report detailed data table

## Learn More

To learn how to add filters to individual elements and more regarding the elements contained in the tiles, see the [Data Element Tutorial](#) article.

Additionally, see how every report compares with previous instances in the [New Billing Reports Comparison](#) article.