

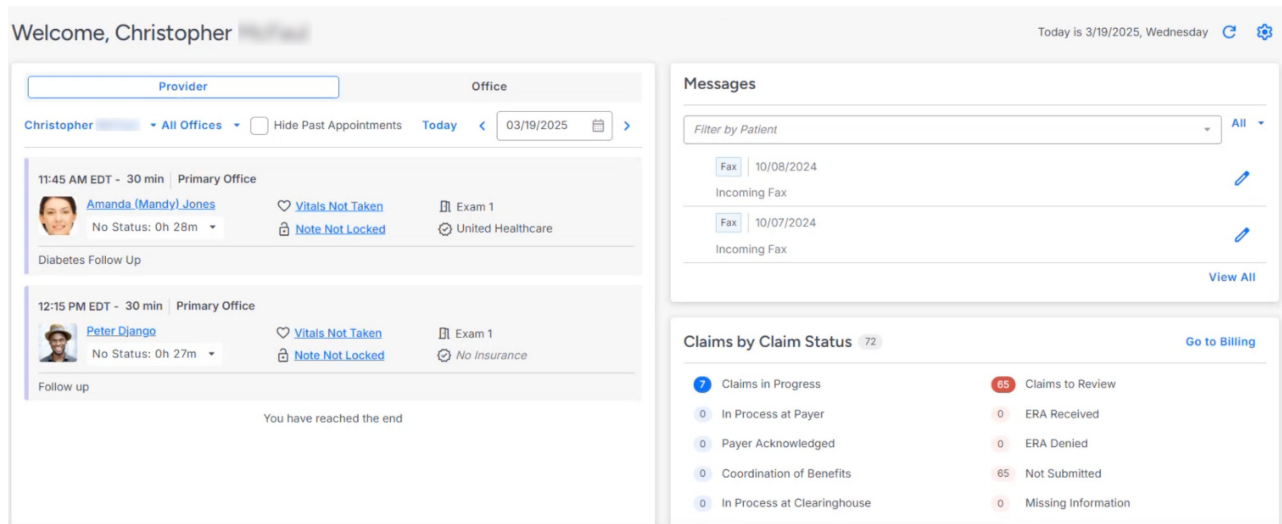
# Dashboard

Last modified on 04/02/2025 1:29 pm EDT

## Set up the Dashboard | Dashboard widgets

The **Dashboard** offers a comprehensive overview of your day, presenting concise and pertinent information. You can swiftly and effectively take action on various items, including appointments, tasks, and messages, all directly from the **Dashboard** interface.

The page auto-refreshes every three minutes or select the refresh icon  to refresh.



## Set up the Dashboard

### Set the Dashboard as the default landing page



If you set the **Dashboard** as the default landing page in **Account Settings**, it's also set in **Dashboard Settings**.

1. Under **Calendar Settings**, select the **Use new dashboard homescreen** checkbox.
2. Select **Update Entire Profile**.

Account Settings

Profile

View

General

Email

Medical Billing

eRx Info

Services

Usage

Sample Data

Security

Calendar Settings

Display flag icon on appointment

☒

Display Flag icon on appointments when a patient/appointment has flag(s) associated

Display lock icon on appointment

☒

Display Lock icon on appointments when the clinical note is locked


Use new dashboard homescreen

☒

Uncheck to go straight to the calendar after logging in

## Dashboard settings

Customize the information shown on the **Dashboard** and choose your default landing page from the **Dashboard Settings** window.

1. Select the gear icon .
2. Make your selections and then select **Save**.

Dashboard Settings

Default Landing Page

☒ Dashboard

☐ Calendar

Widgets (Up to 5)

☒ Appointments

☒ Messages

☒ Tasks

☒ Claims By Claim Status

☐ Post

☒ Patient Data

Appointment Visibility

☐ Show cancelled appointments

☐ Show rescheduled appointments

Cancel

Save

- **Default Landing Page:** Select **Dashboard** or **Calendar** as your default landing page.
- **Widgets:** Select the widgets to show on the **Dashboard** by selecting its checkbox.
- **Appointment Visibility:** Select whether to show canceled and/or rescheduled appointments. The **Appointments** widget is required for this option to show.

## Dashboard widgets


### Calendar widget

- Select the **Provider** or **Office** tab to switch views
- Use the dropdowns to select the provider or office
- Change the view by day, week, month, and year


ProviderOffice


Krystal Parker, MD ▾ All Offices ▾Today<>09/11/2024


9:30 AM -20 min Primary Office


drchrono Test

No Status: 0h 13m ▾

Vitals Not Taken


Note Not Locked

New Patient


United Healthcare


Dashboard


1:00 PM -20 min Primary Office


Jimmy Testman

No Status: 0h 3m ▾

Vitals Not Taken

Note Not Locked

Follow Up

United Healthcare

Medication follow up


### Appointments widget

The **Appointments** widget provides a detailed view of your appointments for the day. You can update it directly from the **Dashboard** to manage your appointments efficiently.



The widget automatically scrolls to the next/upcoming appointment for the day. Scroll up or down to see previous or future appointments.

The **Appointments** widget shows the following:


- Select the **Hide Past Appointments** checkbox to hide past appointments (greyed out)
- Select **Edit appointment**  (appears when you select the appointment box) to edit appointments
- Appointment time
- Office
- Patient's name - Select the link to open the patient chart
- Appointment status (below the patient's name) - Change the status from the dropdown list
- Appointment duration
- Reason for visit
- Vitals status - Select the link to open the appointment screen)
- Clinical note status - Select the link to open the clinical note
- Exam room
- Insurance and eligibility status
- The appointment box's border color is derived from the color selected for the [appointment profile](#)

Provider


Office


Ryan MacMillan ▾ All Offices ▾ ☐ Hide Past Appointments Today < 01/14/2025 >


9:00 AM PST - 75 min | Primary Office


[Daniel Kronos](#)

No Status: since 01/15/2025 ▾

 [Vitals Not Taken](#)


 [Note Not Locked](#)

 Exam 1


 United Healthcare


New Patient / Initial Visit


10:30 AM PST - 35 min | Primary Office


[Daniel Kronos](#)

No Status: since 01/15/2025 ▾

 [Vitals Not Taken](#)


 [Note Not Locked](#)

 Exam 2


 United Healthcare


unspecified pain or illness


11:20 AM PST - 30 min | Primary Office


[Michelle Harris](#)

No Status: since 01/15/2025 ▾


 [Vitals Not Taken](#)

 [Note Not Locked](#)


 Exam 2


 No Insurance


12:05 PM PST - 30 min | Primary Office


[Jenny \(Jen\) Harris](#)

No Status: since 01/15/2025 ▾

 [Vitals Not Taken](#)

 [Note Locked](#)

 Exam 2

 No Insurance


## Messages widget

The **Messages** widget shows all of your incoming messages, which you can filter by:

- Patient
- Message type (read, unread, or all messages), a blue dot indicates an unread message

The individual message box shows the following:

- Message type

- Patient name - Select the link to open the patient chart
- Message date
- Message title
- Select the pencil icon  to open the **Message Center**

Messages


Filter by Patient

All

Fax

10/08/2024


Incoming Fax



Fax

10/07/2024

Incoming Fax



View All

## Tasks widget

The **Tasks** widget is a dynamic view of your outstanding tasks, which can be updated and completed directly from the **Dashboard**.

- Select **Task** to create a task
- Filter by patient or category
- Use the dropdown to update the status
- Overdue tasks are at the top of the list in red

Individual task boxes shows:

- Category
- Task title
- Status
- Priority level

Tasks

+ Task

Filter by Patient

Filter by Category

Overdue: 12/05/2024, 11:27 AM

High

Amanda (Mandy) Jones

Lab Results

Lab Draw

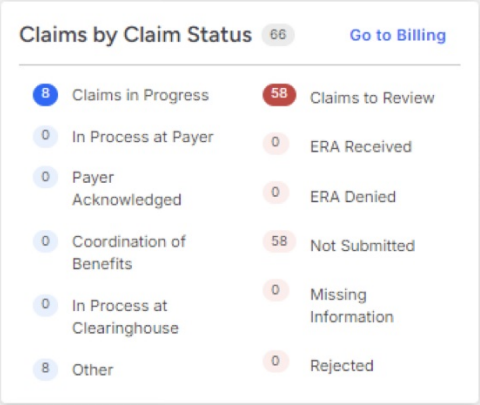
In Progress

View All

## Claims by Claim Status widget

The **Claims by Claim Status** widget provides a snapshot view of the practice's claims, categorized by status that launches users to the **Live Claims Feed**.

- Select **Go to Billing** to open the **Live Claims Feed** page. All claims statuses are shown.
- The widget is divided into two columns — **Claims in Progress** and **Claims to Review**
- The total number of claims appears next to each column header and claim statuses
- Select a column heading or claim status link to view their details on the **Live Claims Feed** page.



### Patient Data widget

The [Patient Data widget](#) shows the practice's total outstanding patient balance, the number of active payment plans, and the number of late payment plans.

### Post widget

The [Post widget](#) shows the practice's unmatched ERAs, unallocated payments, and patient payments for 30, 60, 90, or 120 days.

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