

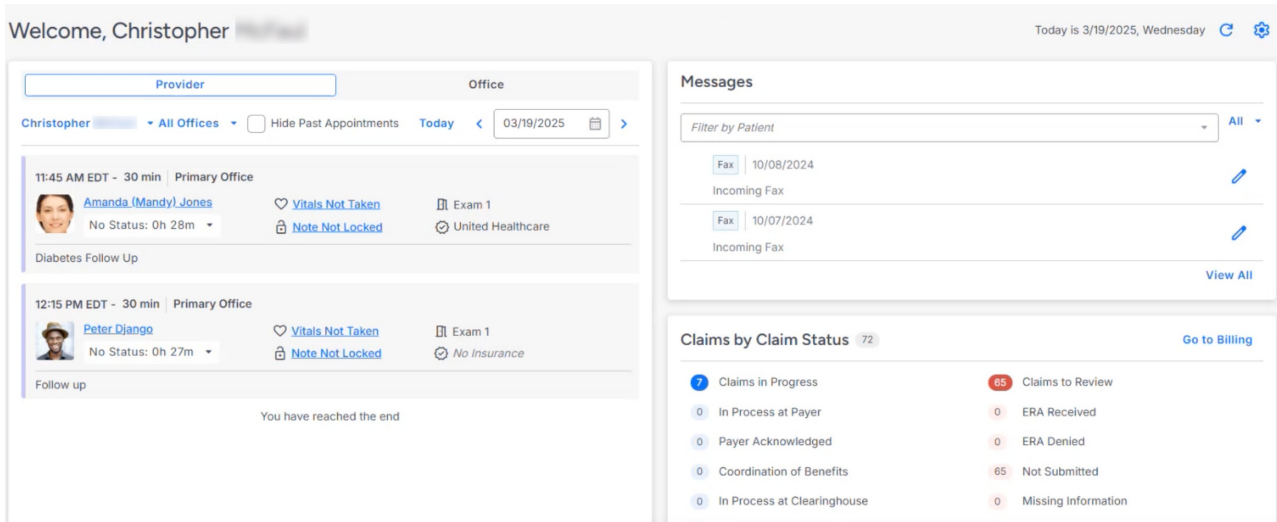
Dashboard

Last modified on 03/24/2025 9:06 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.



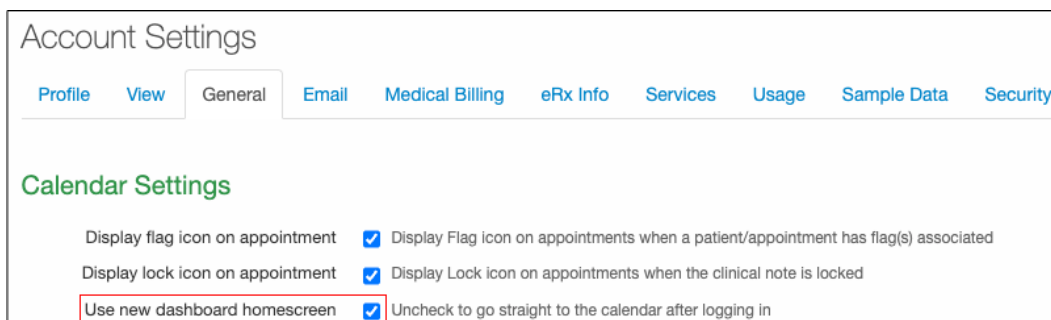
Set up the Dashboard

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**.

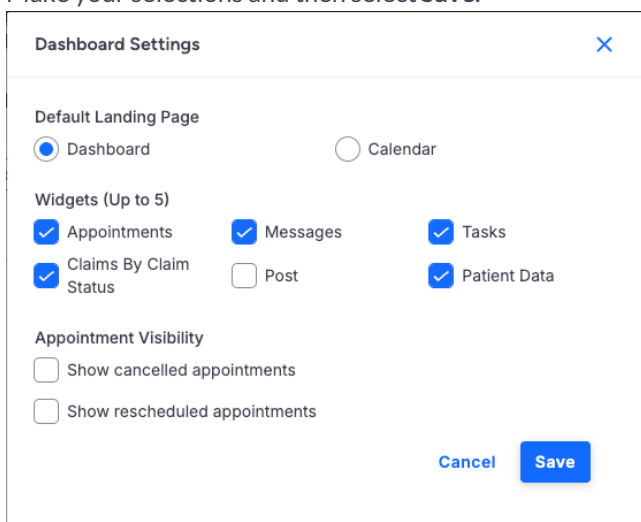
1. Under **Calendar Settings**, select the **Use new dashboard homescreen** checkbox.
2. Select **Update Entire Profile**.



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**.

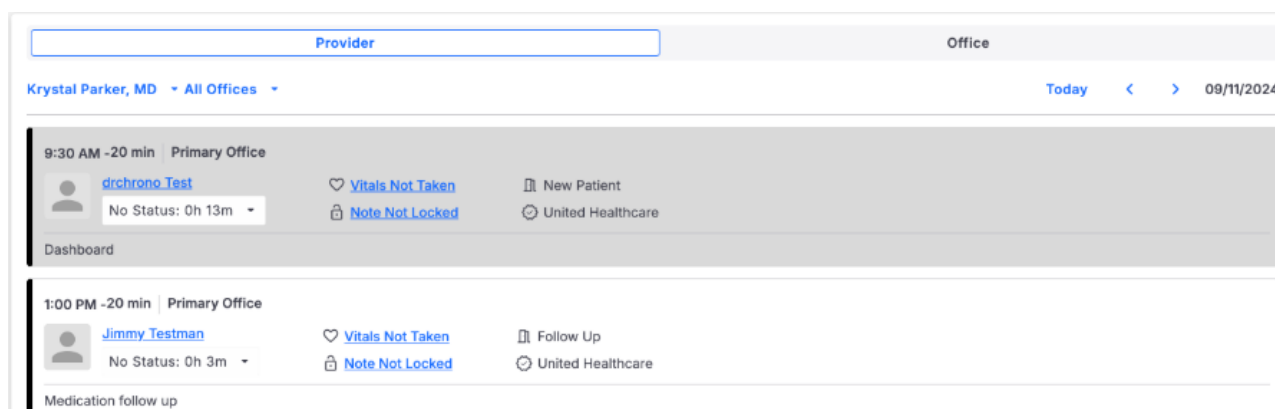


- **Default Landing Page:** Select **Dashboard** or **Calendar** as your default landing page.
- **Widgets:** Select the widgets to show on the **Dashboard** by selecting its checkbox.
- **Appointment Visibility:** Select whether to show canceled and/or rescheduled appointments. The **Appointments**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

Dashboard widgets

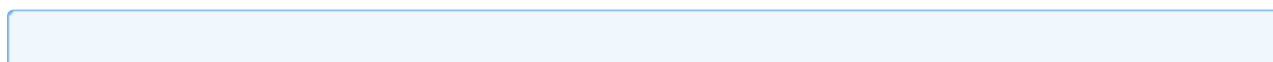
Calendar widget

- 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



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.

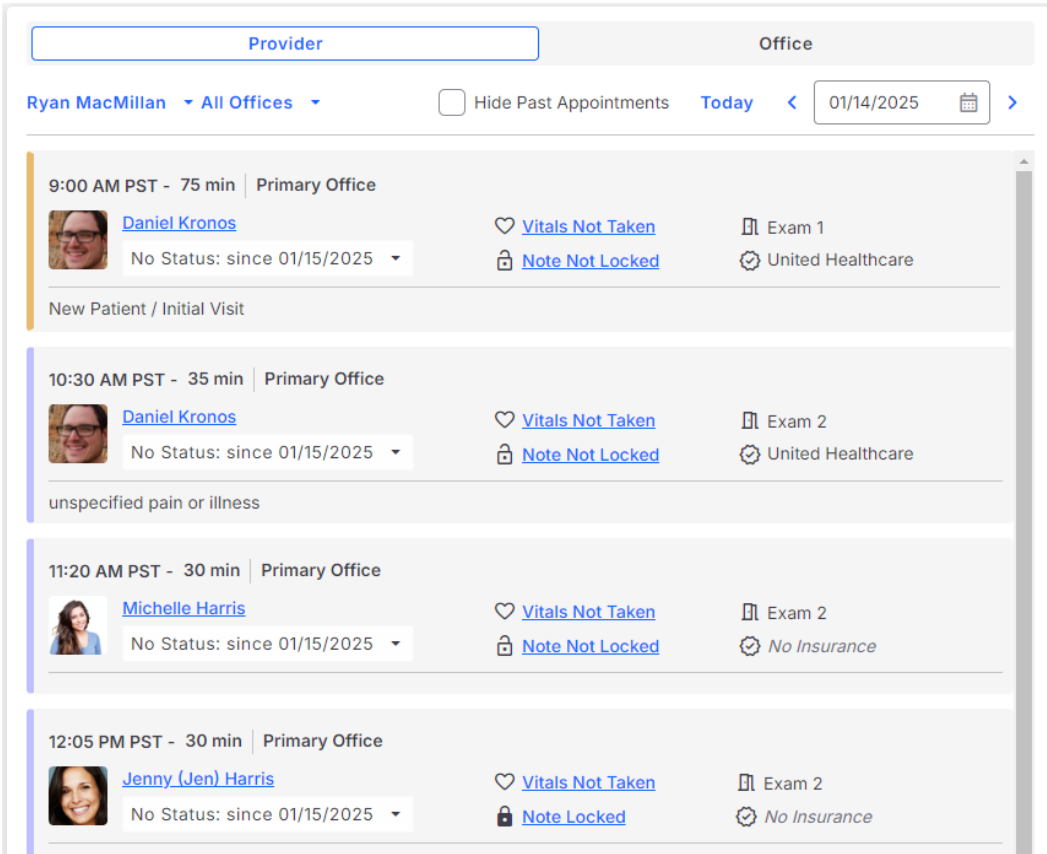




The widget automatically scrolls to the next/upcoming appointment for the day. Scroll up or down to see previous or future appointments.

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](#)



The screenshot displays the Appointments widget interface. At the top, there are tabs for 'Provider' (selected) and 'Office'. Below these, the user 'Ryan MacMillan' is shown with a dropdown for 'All Offices'. A checkbox for 'Hide Past Appointments' is present, along with the current date 'Today' and a calendar icon for '01/14/2025'. The main area lists four appointments:

Time	Duration	Office	Provider	Status	Vitals	Note	Exam	Insurance
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

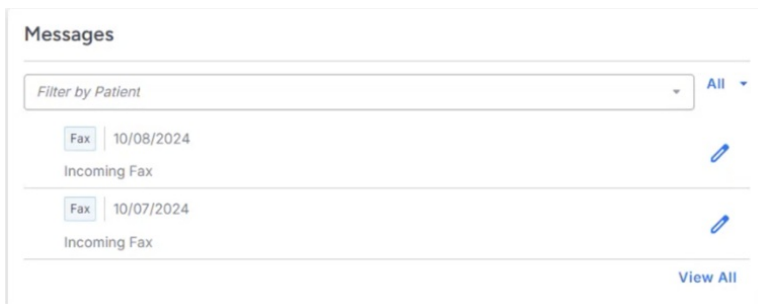
The **Messages** widget shows all of your incoming messages, which you can filter by:

- 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**



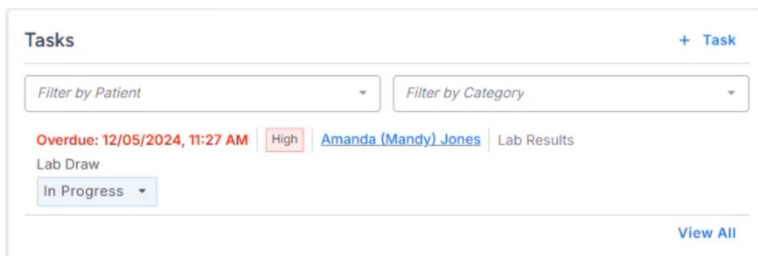
Tasks widget

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



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.

Claims by Claim Status 66 [Go to Billing](#)

8 Claims in Progress	58 Claims to Review
0 In Process at Payer	0 ERA Received
0 Payer Acknowledged	0 ERA Denied
0 Coordination of Benefits	58 Not Submitted
0 In Process at Clearinghouse	0 Missing Information
8 Other	0 Rejected

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.
