

# Dashboard

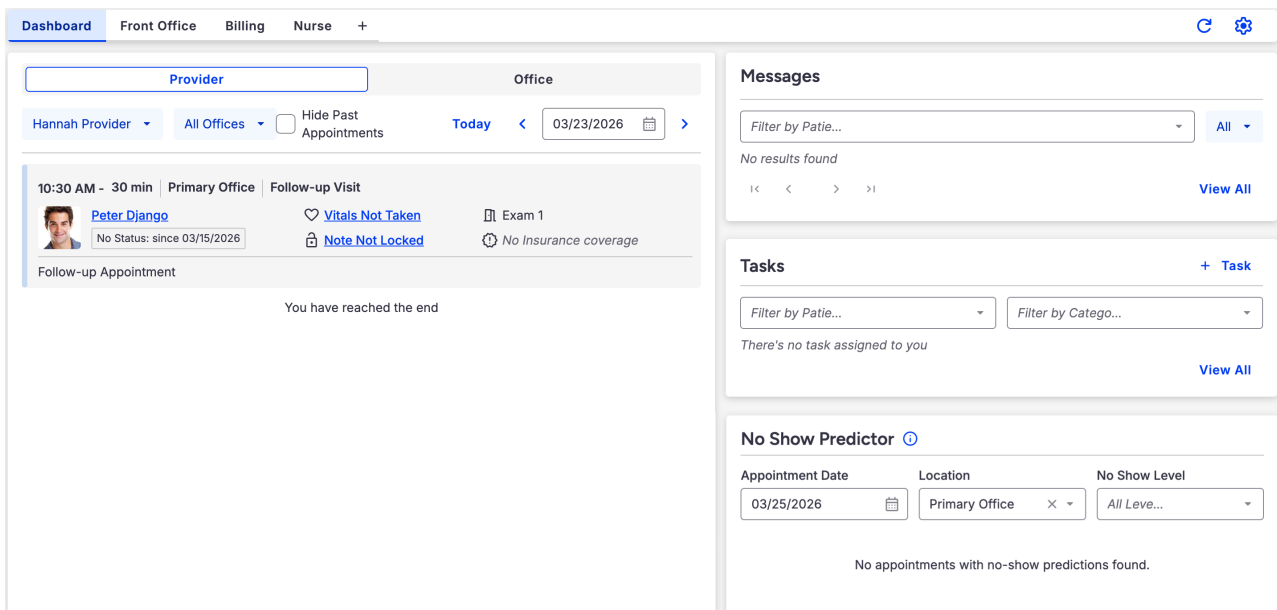
Last modified on 04/15/2026 1:44 pm EDT

## Dashboard overview | [Set the Dashboard as the default landing page](#)

### Dashboard overview

The **Dashboard** offers a comprehensive overview of your day, presenting concise and pertinent information. You can take action on items such as appointments, tasks, and messages directly from the **Dashboard**.

- Dashboard views appear on the top left.
- The page automatically refreshes every three minutes. Select the refresh icon  to manually refresh.



The screenshot displays the dashboard interface with the following components:

- Navigation:** Dashboard (selected), Front Office, Billing, Nurse, +
- Appointment Card:**
  - Provider: Hannah Provider
  - Office: All Offices
  - Hide Past Appointments:
  - Today: 03/23/2026
  - Appointment: 10:30 AM - 30 min, Primary Office, Follow-up Visit
  - Provider: Peter Django (No Status: since 03/15/2026)
  - Actions: Vitals Not Taken, Note Not Locked, Exam 1, No Insurance coverage
  - Label: Follow-up Appointment
  - Status: You have reached the end
- Messages:** Filter by Patient, No results found, View All
- Tasks:** Filter by Patient, Filter by Category, There's no task assigned to you, View All
- No Show Predictor:** Appointment Date: 03/25/2026, Location: Primary Office, No Show Level: All Levels, No appointments with no-show predictions found.

## Set the Dashboard as the default landing page



Setting the **Dashboard** as the default landing page in **Account Settings** will also apply in **Dashboard Management**, and vice versa.

### From Account Settings

1. Select **Account > Account Settings > General**.
2. Under **Calendar Settings**, select the **Use new dashboard homescreen** checkbox.
3. 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

## From Dashboard Management










1. Select Schedule > Dashboard.
2. Select the gear icon  on the top right to open the **Dashboard Management** side panel.
3. Select the **Dashboard** option.

### Dashboard Management ×

**Default Landing Page**

Dashboard
  Calendar

**Dashboards**

:: Dashboard <span style="border: 1px solid #ccc; padding: 2px;">User</span>	  
:: Front Office <span style="border: 1px solid #ccc; padding: 2px;">User</span>	  
:: Billing <span style="border: 1px solid #ccc; padding: 2px;">User</span>	  
:: Nurse <span style="border: 1px solid #ccc; padding: 2px;">User</span>	