

Dashboard

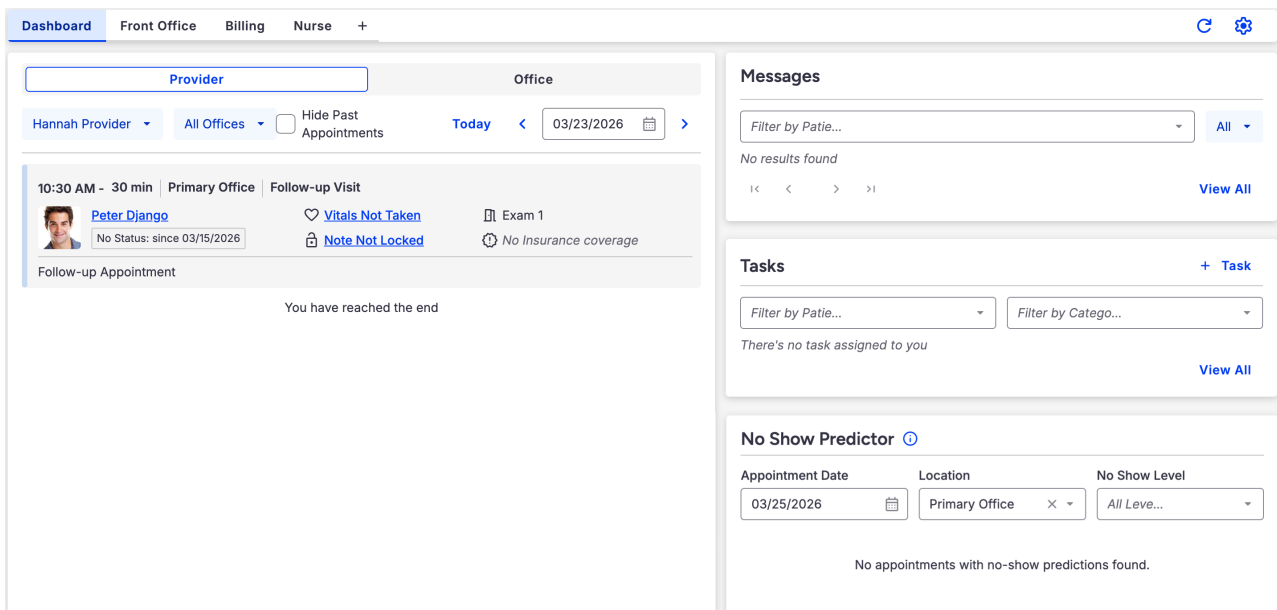
Last modified on 03/26/2026 7:52 pm EDT

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 various items, including appointments, tasks, and messages, all 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. At the top, there is a navigation bar with tabs for 'Dashboard', 'Front Office', 'Billing', and 'Nurse'. The main content area is divided into several sections:

- Provider/Office Section:** Includes a search bar for 'Provider' and 'Office'. Below it, there are filters for 'Hannah Provider', 'All Offices', and 'Hide Past Appointments'. The date is set to 'Today' (03/23/2026).
- Appointment Card:** Shows a 10:30 AM - 30 min appointment for Peter Django at the Primary Office. It includes a 'Follow-up Visit' label and several status indicators: 'Vitals Not Taken', 'Exam 1', 'Note Not Locked', and 'No Insurance coverage'. The appointment is labeled as a 'Follow-up Appointment' and shows 'You have reached the end'.
- Messages Panel:** Features a search filter 'Filter by Patie...', a 'No results found' message, and a 'View All' link.
- Tasks Panel:** Includes a '+ Task' button, a search filter 'Filter by Patie...', another filter 'Filter by Catego...', a 'There's no task assigned to you' message, and a 'View All' link.
- No Show Predictor Panel:** Has a title 'No Show Predictor' and filters for 'Appointment Date' (03/25/2026), 'Location' (Primary Office), and 'No Show Level' (All Leve...). It displays the message '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 User	✎ 👁 🗑
⋮ Front Office User	✎ 👁 🗑
⋮ Billing User	✎ 👁 🗑
⋮ Nurse User	✎ 👁 🗑