Dashboard

Last modified on 06/30/2025 7:33 pm EDT

Set up the Dashboard Dashboard widgets

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**.

The page automatically refreshes every three minutes. Select the refresh icon ${f C}$ to manually refresh.

elcome, Hannah Provider		Today is 6/27/2025, Frid	lay C
Provider	Office	Messages	
Hannah Provider All Offices Today	< 06/27/2025	Filter by Patient No results found	All -
12:00 PM - 30 min West Office New Patient Visit	n 1	K ← Prev Next → >1	View A
New Patient Visit	ed Healthcare	Claims by Claim Status 12 Go t	to Billin
12:15 PM - 30 min Primary Office Followup Visit		Claims in Progress Claims to Review	;
Peter Django Vitals Not Taken No Status: since 04/23/2025 Note Not Locked	I Exam 2 ○ No Insurance coverage	0 In Process at Payer > 0 ERA Received	;
Persistent cough		Payer Acknowledged > 0 ERA Denied Coordination of Benefits > 12 Not Submitted	;
1:00 PM - 30 min Primary Office Followup Visit		0 In Process at Clearinghouse > 0 Missing Information	;
Eva Genmark Vitals Not Taken No Status: since 04/23/2025 D Note Not Locked	II Exam 3 ① No Insurance coverage	0 Other > 0 Rejected	>
Left shoulder pain		Patient Balance	
2:50 PM - 30 min Primary Office Followup Visit	∏t Exam 4	Total Outstanding Patient Balance	\$0 >
No Status: since 04/23/2025 Contended Note Not Locked	O No Insurance coverage	0 Active Payment Plans	>
		0 Late Payment Plans	>

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. Select Account > Account Settings > General tab.
- 2. Under Calendar Settings, select the Use new dashboard homescreen checkbox.
- 3. Select Update Entire Profile.

a

Accou	unt Se	ttings							
Profile	View	General	Email	Medical Billing	eRx Info	Services	Usage	Sample Data	Security
Calenc	lar Sett	ings							
Di	splay flag i	con on appoi	intment	Display Flag icon of the second se	on appointment	s when a patier	nt/appointme	ent has flag(s) associ	ated
Di	splay lock i	con on appoi	intment	Display Lock icon	on appointmen	ts when the clir	nical note is l	ocked	
U	se new das	hboard home	escreen	Uncheck to go stra	aight to the cale	endar after logg	ing in		

Dashboard settings

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

- 1. If the **Dashboard** isn't your default landing page, select **Schedule** > **Dashboard**.
- 2. Select the gear icon 😟 on the top right.

The Dashboard Settings window opens.

3. Make your selections and then select Save.



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

Dashboard widgets

Appointments widget

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

- Select the Provider or Office tab to switch views
- Filter the appointments by a specific provider, office, or date.
- The widget automatically scrolls to the day's next appointment. Scroll up or down to see previous or future appointments.

Label/Icon/Checkbox	Description/Field on Appointment Page
Hide Past Appointments	Select the checkbox to hide past appointments.
0	Edit the appointment. The icon appears when you select an appointment
	box.
Appointment time and duration	Scheduled time and duration
Office location	Office
Appointment profile	Profile
Patient's name	Select the link to open the patient's chart.
Vitals Not Taken/Vitals Taken	Select the Vitals Not Taken/Vitals Taken link to open the Appointment page.
	Vitals Not Taken: This status shows when the patient's vitals haven't been taken by medical staff or when you select Mark as Undone on the Vitals page. The lock icon ^a is on the Vitals tab in the image below because the clinical note is locked.
	Appointment on Jun 27, 2025 for Chrissy Bright
	Appointment Billing Eligibility AVItals Growthcharts Flags Log Comm. Revisions
	Units & - Mark as Undone
	System Vitals
	page. Appointment on Jun 27, 2025 for Peter Django Appointment Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Units & Mark as Done System Vitals
Exam room	Fxam
Appointment status	Located below the patient's name. Use the dropdown to change the status. Status on Appointment page.
Note Not Locked/Note Locked	Select the Note Not Locked/Note Locked link to open the clinical note. Note Not Locked: This status shows when the clinical note hasn't been locked. Note Locked: This status shows when the clinical note has been locked.
Insurance and eligibility status	If an appointment has multiple eligibility coverage, you can hover over a tooltip to view additional eligibility coverages and the date it was checked.
Reason for visit	Reason
Border color	Border color on the left side is derived from the color selected for the
	appointment profile (Schedule > Appointment Profiles).

Provider			Office
Hannah Provider 🔹 All Offices 👻	Hide Past Appointments	Today	< 04/23/2025 ☐ >
12:00 PM - 30 min West Office New	Patient Visit		
Chrissy Bright 💎 V	/itals Taken	🖸 Exam 1	
Confirmed: 0h 14m	lote Locked	🕑 United H	Healthcare
New Patient Visit			
12:15 PM - 30 min Primary Office Fol	lowup Visit		
Peter Diango	Vitals Not Ta	iken	🕅 Exam 2
No Status: since 04/23/2025	Note Not Loo	cked	No Insurance coverage
Dereistent equals			•
Persistent cougn			
1:00 PM - 30 min Primary Office Foll	owup Visit		
Eva Conmark		kon	D Evan 2
No Status: since 04/23/2025		akad	
		JACU	Cr No Insurance coverage
Left shoulder pain			

Messages widget

The Messages widget shows all of your incoming messages.

- Filter by patient name or by message type.
- Filter message status by selecting All, Unread, or Read from the dropdown.
- A blue dot indicates an unread message.

A message box shows the following:

- Message title
- Message type
- Patient's name Select the link to open the patient's chart.
- Message date
- Select the pencil icon 🖉 to open the Message Center. The icon appears when you select a message.

Filte	er by Patient		*	All	•
•	appointment				
	Message Emma Bush 02/26/2025				
•	Generated Sheet: live_claims_feed.csv				
	Message 11/25/2024				
	Fax 10/07/2024				
	Incoming Fax				

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
- Update the status using the dropdown
- Overdue tasks are at the top of the list in red

A task box shows the following:

- Due date
- Priority level
- Patient's name Select the link to open the patient's chart.
- Category
- Task title
- Status Use the dropdown to update the status

Filter by Patient		- Filt	ter by Category	
0.0000000000000000000000000000000000000	24 11:27 AM High Ar	anda (Mand	v) Jones Lab Results	
Overdue: 12/05/20	24, 11-27 Alvi 11911 Al	idirida (iridiria		

Claims by Claim Status widget

The **Claims by Claim Status** widget provides a snapshot view of the practice's claims, categorized by statuses that launch 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 status.
- 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.