Dashboard

Last modified on 03/24/2025 9:06 pm EDT

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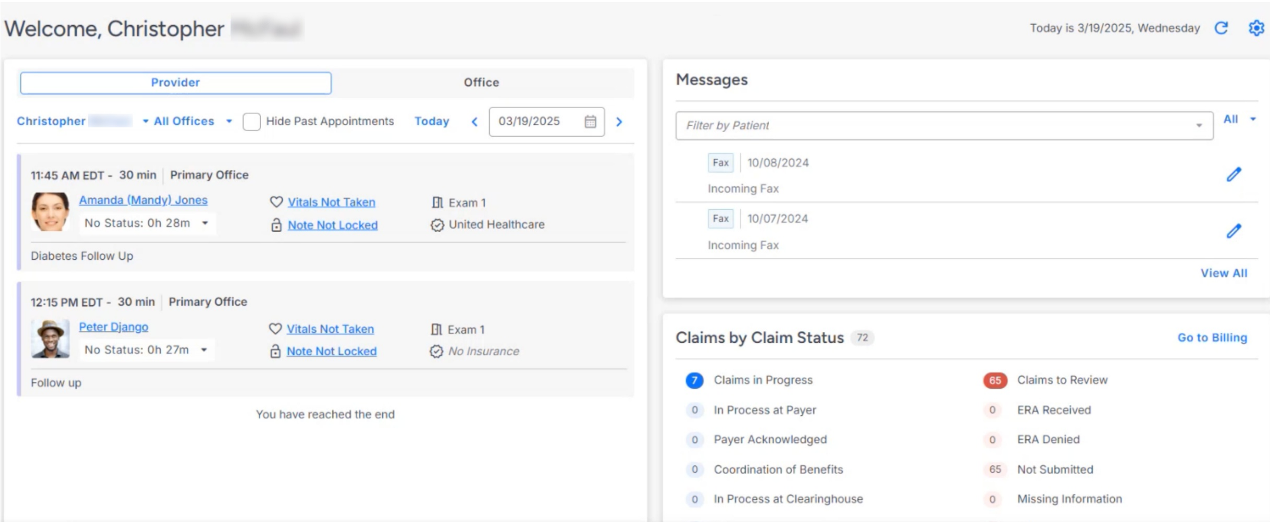
The **Dashboard** offers a comprehensive overview of your day, presenting concise and pertinent information. You can swiftly and effectively take action on various items, including appointments, tasks, and messages, all directly from the **Dashboard** interface.

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

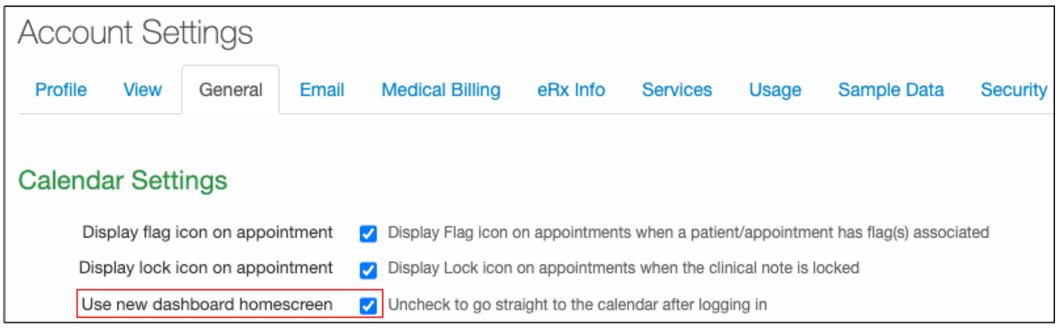


Set up the Dashboard

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**.

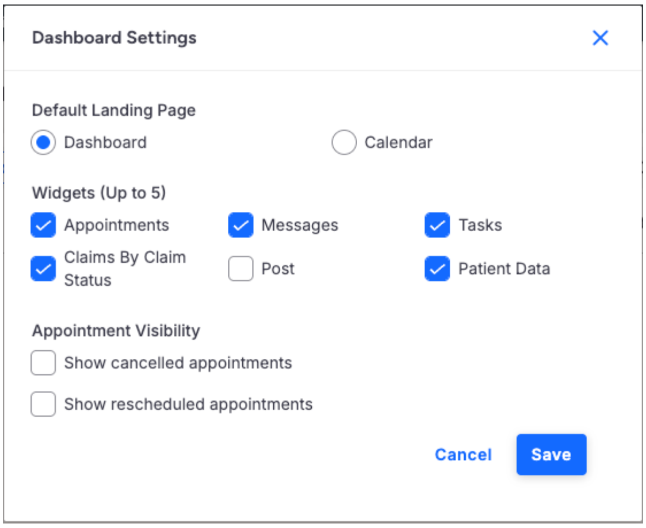


Dashboard settings

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**.

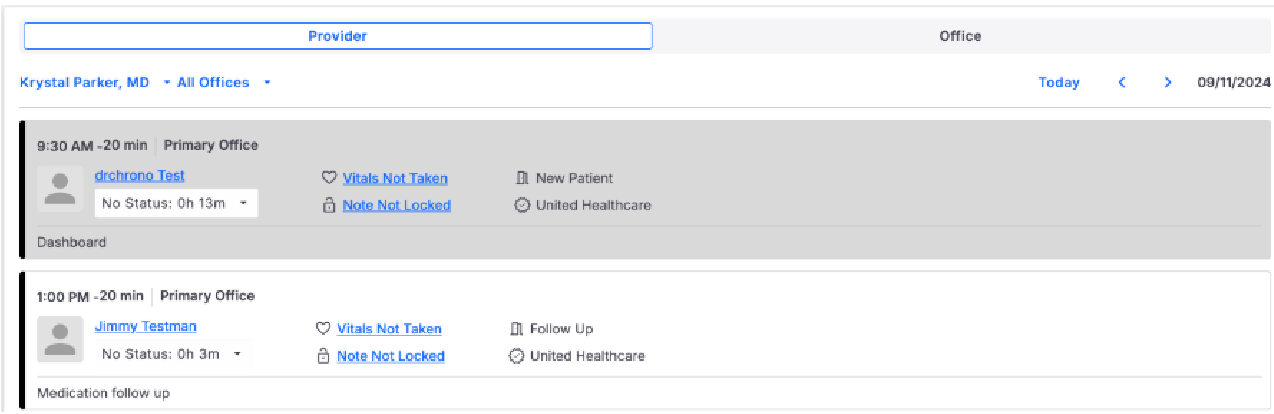


   - **Default Landing Page:** Select **Dashboard** or **Calendar** as your default landing page.
   - **Widgets:** Select the widgets to show on the **Dashboard** by selecting its checkbox.
   - **Appointment Visibility:** Select whether to show canceled and/or rescheduled appointments. The **Appointments**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



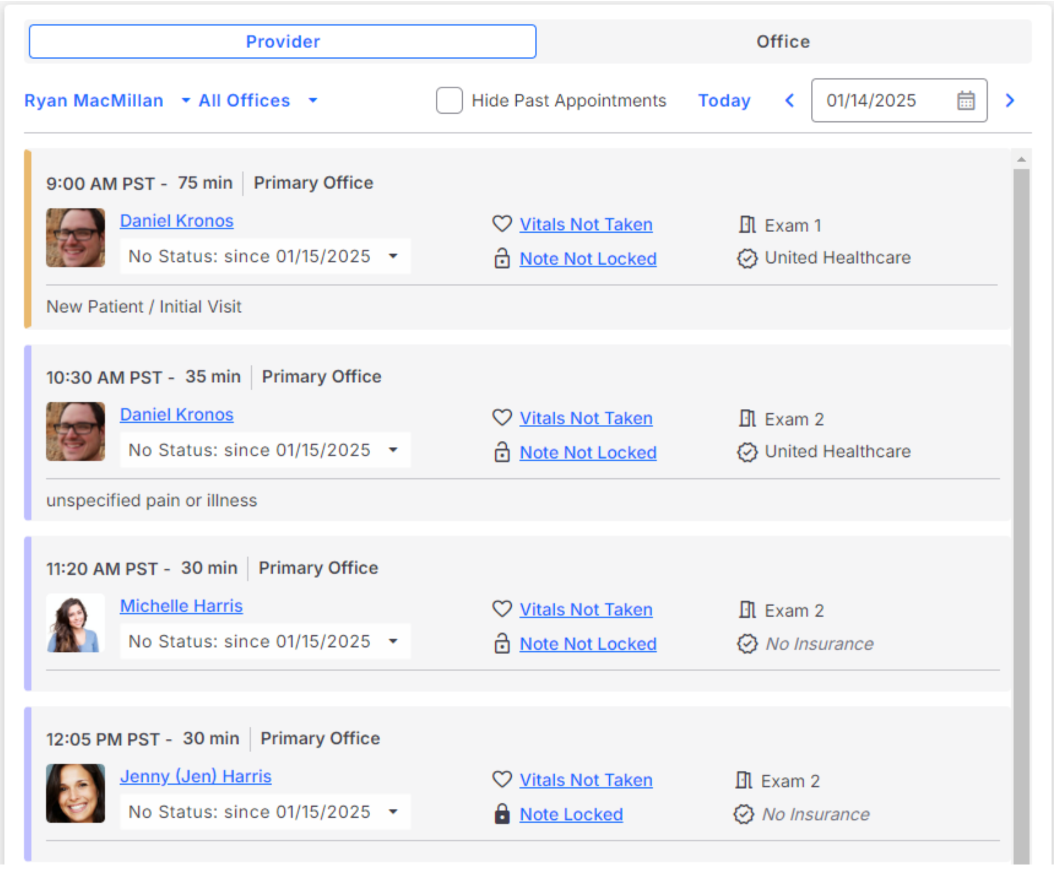
Appointments widget

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



Messages widget

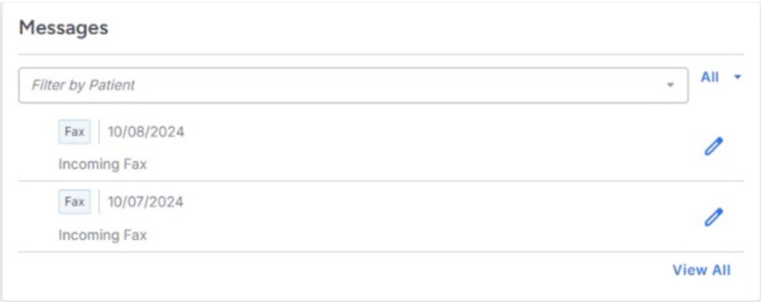
The **Messages** widget shows all of your incoming messages, which you can filter by:

- 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**



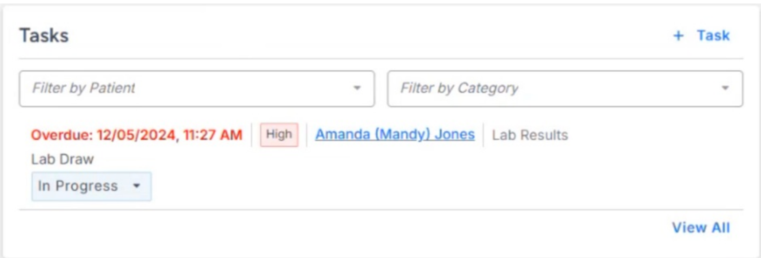
Tasks widget

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:

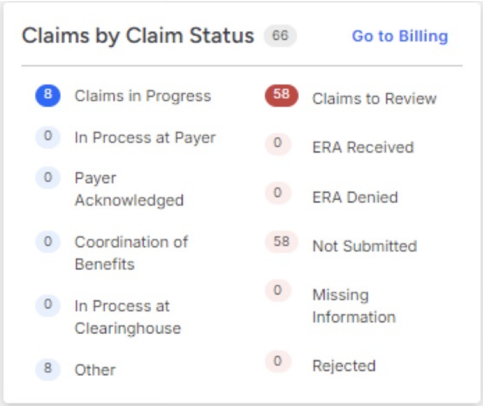
- Category
- Task title
- Status
- Priority level



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.



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.