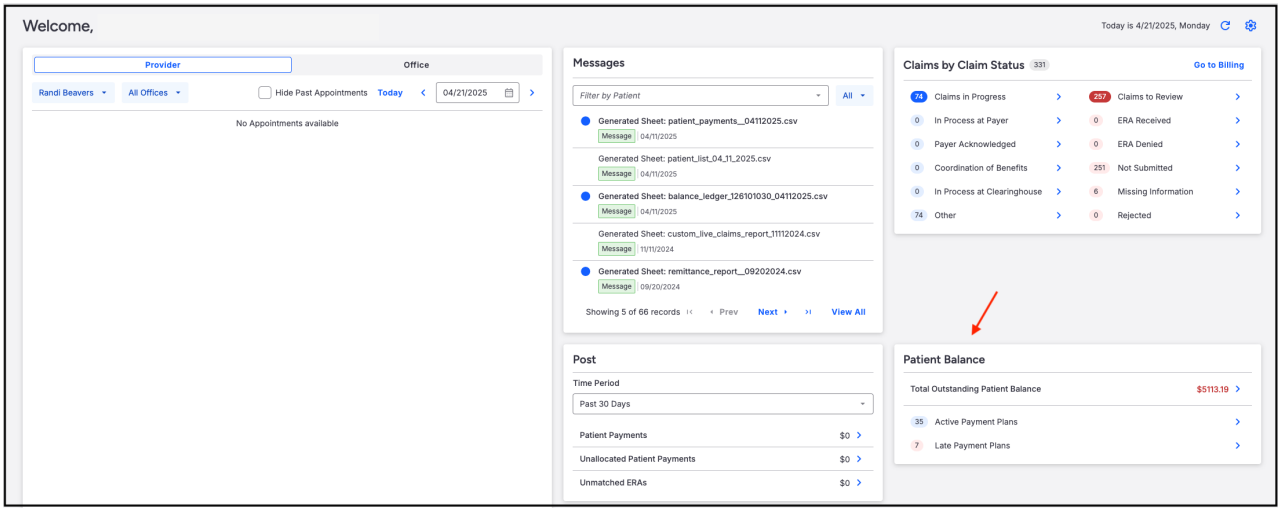
Patient Balance Widget

Last modified on 10/26/2026 3:39 pm EDT

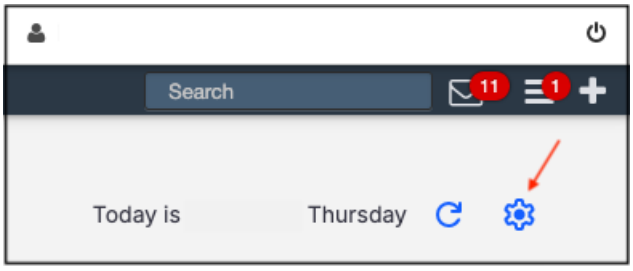
Patient Balance Widget

The Patient Balance widget on your dashboard will show you the total outstanding patient balance, the number of active payment plans, and the number of late payment plans.

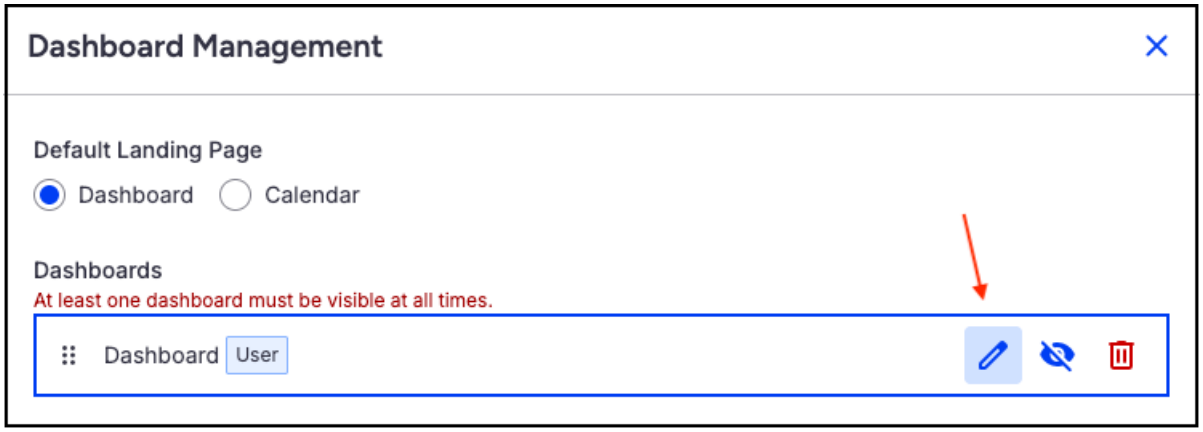


To enable this widget:

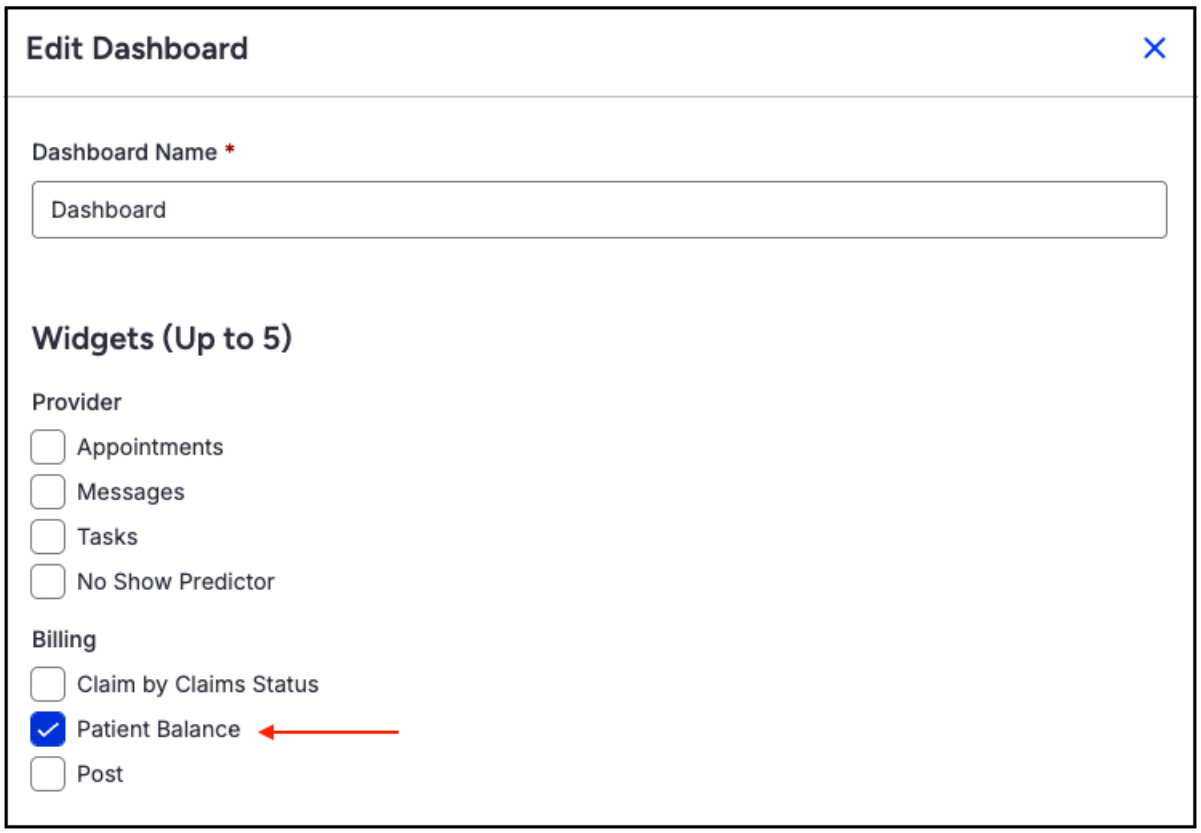
1. Press the gear icon on your dashboard (**Schedule > Dashboard**).



2. Select the **Edit** pencil.

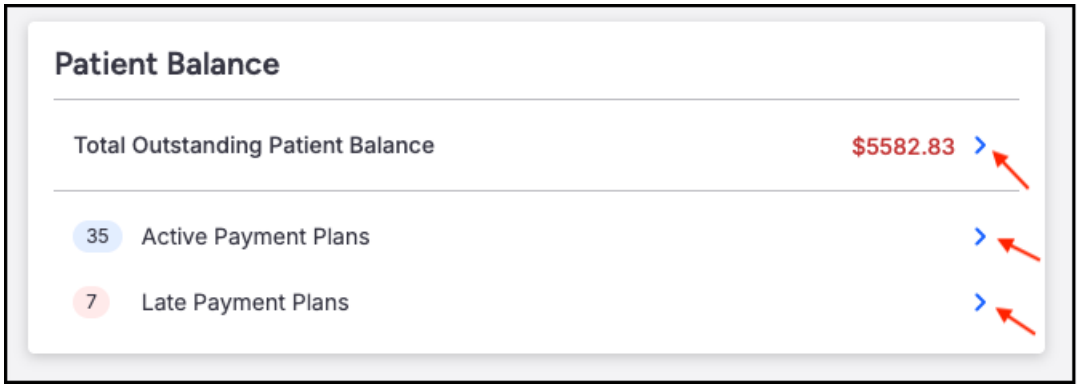


3. Select the **Patient Balance** widget by checking the box to the left of the name.



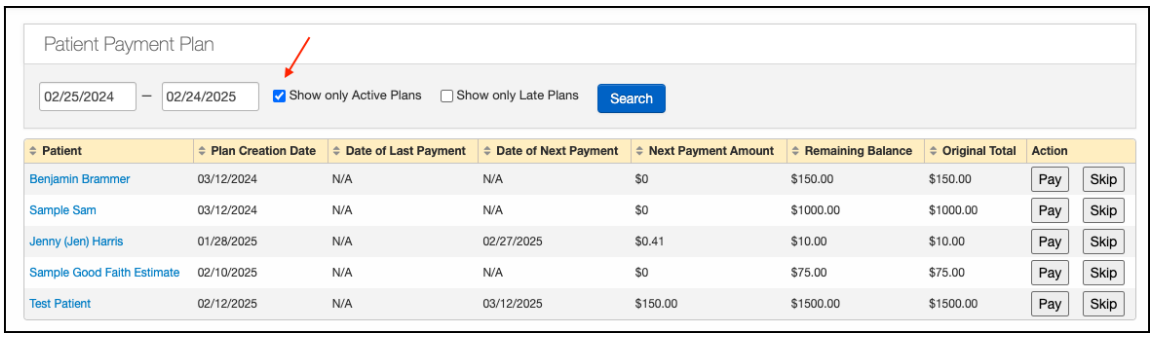
4. The Patient Balance widget will now show on your dashboard, showing the total outstanding patient balance, how many active payment plans are listed for your office, and how many late payment plans are listed for your office.

    a. To see additional details regarding the total outstanding balance, the active payment plans, or the late payment plans, press the blue arrow on the right. You will be taken to a screen where you can see details.



b. Pressing **Total Outstanding Patient Balance** will take you to the Live Claims Feed

c. Pressing **Active Payment Plans** will take you to a screen showing active payment plans for your office.



d. Pressing **Late Payment Plans** will take you to a screen showing late payment plans for your office.

