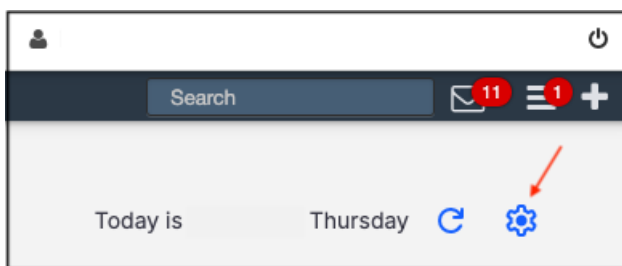# Patient Data Widget

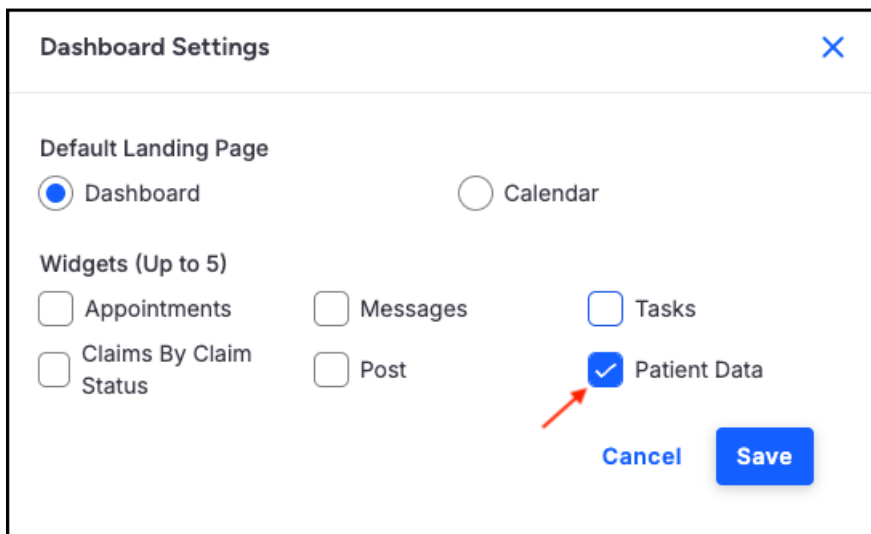Last modified on 02/24/2025 10:27 am EST

Patient Data Widget

The Patient Data widget on your dashboard will show you the total outstanding patient balance, how many active payment plans, and how many late payment plans there are. To enable this widget:

1. Press the gear icon on your dashboard.

2. Select the box next to **Patient Data**.

3. The Patient Data widget will now show on your dashboard, showing the total outstanding patient balance, how many active payment plans, 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.

Patient	Plan Creation Date	Date of Last Payment	Date of Next Payment	Next Payment Amount	Remaining Balance	Original Total	Action	
Benjamin Brammer	03/12/2024	N/A	N/A	$0	$150.00	$150.00	Pay	Skip
Sample Sam	03/12/2024	N/A	N/A	$0	$1000.00	$1000.00	Pay	Skip
Jenny (Jen) Harris	01/28/2025	N/A	02/27/2025	$0.41	$10.00	$10.00	Pay	Skip
Sample Good Faith Estimate	02/10/2025	N/A	N/A	$0	$75.00	$75.00	Pay	Skip
Test Patient	02/12/2025	N/A	03/12/2025	$150.00	$1500.00	$1500.00	Pay	Skip

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

Patient Payment Plan

| 02/25/2024 | — | 02/24/2025 | ☐ Show only Active Plans | ☑ Show only Late Plans | **Search** |

⇕ Patient	⇕ Plan Creation Date	⇕ Date of Last Payment	⇕ Date of Next Payment	⇕ Next Payment Amount	⇕ Remaining Balance	⇕ Original Total	Action
Benjamin Brammer	03/12/2024	N/A	N/A	$0	$150.00	$150.00	Pay Skip
Sample Sam	03/12/2024	N/A	N/A	$0	$1000.00	$1000.00	Pay Skip
Jenny (Jen) Harris	01/28/2025	N/A	02/27/2025	$0.41	$10.00	$10.00	Pay Skip
Sample Good Faith Estimate	02/10/2025	N/A	N/A	$0	$75.00	$75.00	Pay Skip
Test Patient	02/12/2025	N/A	03/12/2025	$150.00	$1500.00	$1500.00	Pay Skip

| 02/25/2024 | — | 02/24/2025 | ☐ Show only Active Plans | ☑ Show only Late Plans | **Search** |

⇕ Patient	⇕ Plan Creation Date	⇕ Date of Last Payment	⇕ Date of Next Payment	⇕ Next Payment Amount	⇕ Remaining Balance	⇕ Original Total	Action