

Dashboard Widgets

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[?](#) To learn how to add widgets to your dashboards, refer to [Create User Dashboards](#).

Appointments

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.
	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	<p>Select the Vitals Not Taken/Vitals Taken link to open the Appointment page.</p> <p>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  is on the Vitals tab in the image below because the clinical note is locked.</p> <div data-bbox="587 1404 1270 1576" data-label="Image"> </div> <p>Vitals Taken: This status shows when you select Mark as Done on the Vitals page.</p> <div data-bbox="587 1688 1270 1861" data-label="Image"> </div>
Exam room	Exam
Appointment status	Located below the patient's name. Use the dropdown to change the status. Status on Appointment page.

Label/Icon/Checkbox	Description/Field 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](#)
Confirmed: 0h 14m

✔ Vitals Taken
🔒 Note Locked

📄 Exam 1
🕒 United Healthcare

New Patient Visit

12:15 PM - 30 min
Primary Office
Followup Visit


[Peter Django](#)
No Status: since 04/23/2025

❗ Vitals Not Taken
🔒 Note Not Locked

📄 Exam 2
🕒 No Insurance coverage

Persistent cough

1:00 PM - 30 min
Primary Office
Followup Visit


[Eva Genmark](#)
No Status: since 04/23/2025

❗ Vitals Not Taken
🔒 Note Not Locked

📄 Exam 3
🕒 No Insurance coverage

Left shoulder pain

Messages

The Messages widget shows all of your incoming messages.

- Filter by patient name.
- Filter by message status by selecting **All**, **Unread**, or **Read** from the dropdown.
- A blue dot indicates an unread message.
- Select the patient name hyperlink to open the patient's chart.
- Select the pencil icon  to open the **Message Center**. The icon appears when you hover over a message.

Messages

Filter by Patie... All

- Online Appointment

 Message [Jaymet \(Update\) C.](#) | 10/30/2025

[Test](#)
- Online Appointment

 Message [Jaymet \(Update\) C.](#) | 10/30/2025

[Test](#)
- Online Appointment

 Message [Jaymet \(Update\) C.](#) | 10/28/2025

[Test](#)
- Online Appointment

 Message [Jaymet \(Update\) C.](#) | 10/23/2025

[Test](#)
- Online Appointment

 Message [Jaymet \(Update\) C.](#) | 10/17/2025

[Test](#)

Tasks

The **Tasks** widget is a dynamic view of your outstanding tasks that you can update and complete directly from the **Dashboard**.

- Select **Task** to create a task.
- Filter by patient or category.
- Select the patient name hyperlink to open the patient's chart.
- Change the task status by selecting **Complete**, **In Progress**, **On Hold**, or **Open** using the dropdown.
- Overdue tasks are at the top of the list in red.
- Select **View All** to open the **Task Center**.
- Select the pencil icon  to open the **Task Center**. The icon appears when you hover over a message.

Tasks + Task

Filter by Patie... Filter by Catego...

Due: 03/26/2026, 2:30 PM High [Celeste Patient](#)

Lab draw

In Progress

[View All](#)

No Show Predictor

The **No Show Predictor** displays the no-show risk score for upcoming appointments. Identify high-risk appointments and take proactive action to reduce no-shows.

- Appointments are assigned a low, medium, or high no-show risk score.
- Predictions run overnight for appointments up to seven days in advance.
- Filter by appointment date, location, or no-show level.
- Select the patient name hyperlink to open the patient's chart.
- Select the pencil icon  to open the **Edit Appointment Communication** side panel. Record communication with patients at risk of a no-show.

No Show Predictor ⓘ

Appointment Date:

Location: × ▾

No Show Level: ▾

Patient	Appointment	No Show
Amy Smith	11:00 AM EDT	Medium
Jenny (Jen) Harris <small>Complete</small>	11:45 AM EDT	Low
Jesse (Demo) Lambert	12:15 PM EDT	Low

Edit Appointment Communication ×

Patient: Jessica Jones

Appointment: 05/30/2025, 9:30 AM

Appointment Status: Not Confirmed

Communication Duration: minutes

Title:

Message:

Communication Type:

Appointment Status: ▾

Cancel Save Changes

Claims by Claim Status

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

- Select **Go to Billing** to open the **Live Claims Feed** page. All claim 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 to view the claims on the **Live Claims Feed** page.

Claims by Claim Status 44 [Go to Billing](#)

1	Claims in Progress	>	43	Claims to Review	>
0	In Process at Payer	>	0	ERA Received	>
0	Payer Acknowledged	>	0	ERA Denied	>
0	Coordination of Benefits	>	43	Not Submitted	>
0	In Process at Clearinghouse	>	0	Missing Information	>
1	Other	>	0	Rejected	>

Live Claims Feed

Select All Offices | Select None | Primary Office: All | West Office: All

Claim St: - - - In Process at Payer, ... | Billing St: All | Appt Profiles: All | [Calculate Counts](#) | [What's this?](#) | TFL Warning

Patient: Payer Name: Payer ID: drc claim #: 03/25/2025 - 03/25/2026 Clinical Note:

Open window in new tab Exclude future follow-up dates [Check All](#) [Clear](#) [Update Filter](#)

Batch Status Change | [Export to File](#) | [Custom Export](#) | [Display](#) | [+ Schedule](#) | [Internal](#) | PAGE 1

Info	Claim ID	Patient	Date of Service	Office	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status	First EDI	Last EDI	Service Notes	Billing Notes
Totals:					\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$150.00	\$0.00								
<input type="checkbox"/>	350662088	Eva Genmark	8/08/2025 04:00PM	Primary Office	\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$150.00	\$0.00	Aetna	Bill Insurance						
Totals:					\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$150.00	\$0.00								

Patient Balance

The **Patient Balance** widget shows the practice's total outstanding patient balance, the number of active payment plans, and the number of late payment plans.

- Select **Total Outstanding Patient Balance** to open the **Live Claims Feed** page and view the patient's total balance due.
- Select **Active Payment Plans** or **Late Payment Plans** to open the **Patient Payment Plan** report and view the active or late payment plans.

Patient Balance

Total Outstanding Patient Balance **\$235.09** >

5 Active Payment Plans >

7 Late Payment Plans >

The image below shows the practice's active payment plans.

Patient Payment Plan							
02/25/2024	–	02/24/2025	<input checked="" type="checkbox"/> Show only Active Plans	<input type="checkbox"/> 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

Post

The **Post** widget shows the practice's unmatched ERAs, unallocated payments, and patient payments for 30, 60, 90, or 120 days.

- Use the **Time Period** dropdown to select how many days of data to show.

Post

Time Period

Past 30 Days ▾

Patient Payments \$15 >

Unallocated Patient Payments \$-15 >

Unmatched ERAs \$0 >

- Select **Patient Payments** or **Unallocated Patient Payments** to open the **Patient Payments** screen and view more details.
- Select **Unmatched ERAs** to open the **Unmatched ERAs** screen and view more details.

Patient Payments Payments Line Items Logs Statements **Balance**

Show zero unallocated payment Unallocated payment between from and to 10/16/2024 02/13/2025

Show zero appointment balance Appointment balance between from and to

Show zero patient responsibility Patient responsibility between from and to

Provider: All ▾ [Find misbalanced line items \(internal\)](#) [Update](#)

Please select a patient.

Export to File 1 - 1 OF 1

Patient Name	Chart ID	Patient Status	Appointment Balance	Total Payment	Unallocated Payment	Current Patient Responsibility
Paul Patient	PAPA000001	A	-\$15.00	\$15.00	-\$15.00	\$1,635.00