DENTALXPAND LEARNING CENTER / WORK HUB

Use the Dashboard Command Center

A complete guide to role-specific Dashboard views, operational summaries, quick actions, refresh behavior, source-of-truth checks, portal boundaries, expected states, troubleshooting, and daily verification.

VERSION	1.0	AUDIENCE	All authorized users
FORMAT	Website + PDF	UPDATED	July 2026

Every person, practice, patient, task, amount, and count shown in this guide is fictional. Never use live patient, provider, practice, employee, credential, password, token, or unredacted third-party data in training material.

Contents

Select any section in supported PDF viewers. Use the Contents link in the upper-right corner of every content page to return here.

Use the Dashboard to notice, navigate, prioritize, and verify 4

Confirm account, tenant, practice, permission, and date 5

Know which Dashboard experience applies 6

Orient yourself on the administrator Dashboard 7

Use manual, realtime, and fallback refresh correctly 8

Read the four organization cards 9

Start common administrator workflows 10

Read operations, billing, workspace, and task signals 11

Open the correct dental or revenue-cycle source 12

Use billing summaries to locate the right queue 13

Use the cross-module pulse 14

Prioritize exceptions without acting from a count alone 15

Read lead, outreach, and cold-calling metrics carefully 16

Use the personal Dashboard to organize your day 17

Verify each personal summary in its source 18

Use the focused provider or client Dashboard 19

Open only approved portal pages and assigned work 20

Keep display filtering and data isolation separate 21

Understand where the Dashboard becomes useful - and where it stops 22

Use summaries carefully and source modules decisively 23

Read loading, failure, empty, zero, and unauthorized states correctly 24

Use the correct first response 25

Run the Dashboard command center safely 26

Resolve access and loading problems without bypassing controls 27

Resolve unexpected counts, activity, and tenant scope 28

Verify that this lesson is complete 29

Continue through DentalXpand learning 30

Related lessons 30

> How to use this guide
> Read access and role context first. Then study the Dashboard that matches your responsibility. Finish with data confidence, expected states, daily workflow, troubleshooting, and verification.

01 / PURPOSE

Use the Dashboard to notice, navigate, prioritize, and verify

Purpose	What it means
Notice	Find overdue, pending, open, unread, failed, or needs-review work
Navigate	Open the source module, record, queue, report, or workflow
Prioritize	Compare authorized workload and exceptions to choose the next investigation
Verify	Return after a source action, refresh, and confirm the expected summary movement

> Dashboard summaries are not the final record
> Confirm organization or practice, owner, due date, status, history, amount, and saved result in the underlying module before deciding or communicating what happened.

The Dashboard answers, 'Where should I look next?' It does not independently answer, 'What exactly happened to this record?'

02 / ACCESS AND CONTEXT

Confirm account, tenant, practice, permission, and date

Check	Required response
Authentication	Use your own named account; shared or borrowed credentials are not acceptable
Tenant readiness	Active organization and membership; complete any required password change
Page permission	The protected /dashboard route requires pages:dashboard
Practice	Provider and client users verify the assigned practice before opening records
Date and period	Separate today, week, month, month-to-date, and total values

My Profile can be the correct landing page
When Dashboard permission is unavailable, the home redirect can send a user to My Profile. A typed Dashboard URL is still protected and can redirect to Access denied.

Review roles, permissions, and access boundaries

03 / ROLE-SPECIFIC VIEW

Know which Dashboard experience applies

Account	Focus	Primary boundary
Admin / Super Admin	Organization employees, tasks, finance, dental operations, medical billing, workspace feed, activity, and review queues	Active organization + backend/RLS
Employee / internal	Personal tasks, attendance, leave, notifications, profile, tools, and personal progress	Current user assignments + granted pages
Provider / client / external	Permission-visible portal links, assigned tasks, task progress, profile, and task team	Organization + practice + API/RLS

Different views can both be correct
Compare approved responsibility, exact pages, actions, organization membership, and practice assignments rather than expecting two accounts to have identical cards.

04 / ADMIN ORIENTATION

Orient yourself on the administrator Dashboard

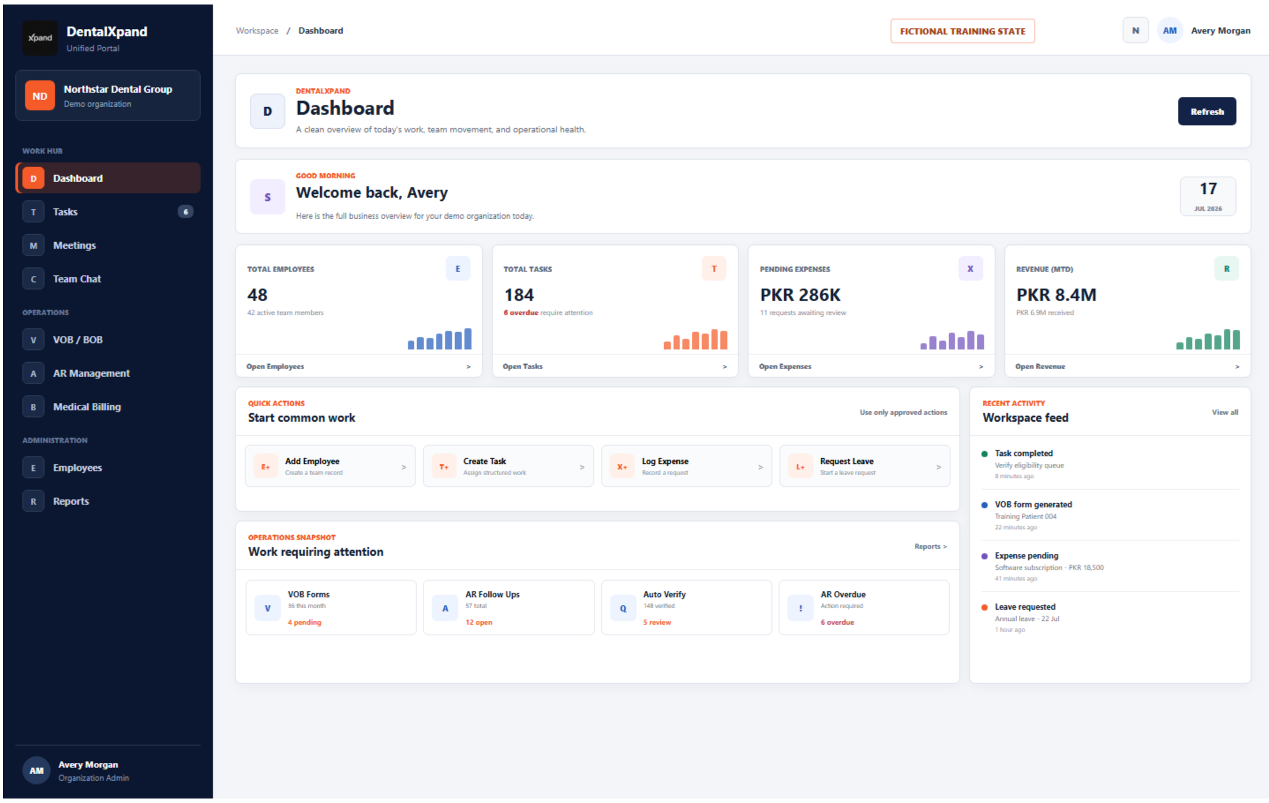

Figure 1. Fictional administrator Dashboard with tenant context, welcome date, summary cards, quick actions, operations snapshot, and recent activity.

> Read left to right
> Confirm context, scan exception cards, use a quick action or summary, then open the source workflow.

05 / REFRESH

Use manual, realtime, and fallback refresh correctly

Path	Behavior	Operator rule
Initial load	Wait for skeletons and loading text to resolve	Do not repeatedly click while tenant and overview state loads
Manual Refresh	Re-fetch relevant role-specific sources	Use when a decision depends on recent changes
Realtime event	Subscribed module changes schedule a silent refresh	A short debounce reduces repeated requests
Fallback polling	Admin about 30 seconds; employee about 45 seconds	Improves resilience while the page remains open
Post-action check	Return from the source and refresh	Confirm expected count or status movement

> Refresh is not a repair operation
> Refresh does not grant permission, change tenant scope, correct a record, or bypass backend and row-level security.

06 / ADMIN SUMMARY CARDS

Read the four organization cards

Card	Summary	Open and verify
Total Employees	Total and active workforce context	Employees: identity, status, team, lifecycle
Total Tasks	Total and overdue work	Tasks: assignment, due date, status, priority, steps
Pending Expenses	Pending amount and request count	Expenses: owner, category, receipt, amount, status
Revenue (MTD)	Month-to-date and received amounts	Revenue/Reports: source, invoice, date, status, period

Mini sparklines are display context
The current sparkline shapes are supplied by the component and are not report-quality historical queries. Use Reports or the source module for verified trends.

Cards are clickable navigation. An animated counter improves readability but does not change the source value.

07 / QUICK ACTIONS

Start common administrator workflows

Action	Verify in the destination
Add Employee	Identity, organization, role, department, status, and approved access
Create Task	Outcome, assignee, due date, priority, status, steps, and safe attachments
Log Expense	Category, amount, date, reason, receipt, and approval path
Request Leave	Type, dates, reason, balance, handoff, and approval

A visible shortcut is not blanket authorization
Page and action permissions, backend checks, organization scope, workflow rules, and RLS still apply after navigation.

08 / OPERATIONS MAP

Read operations, billing, workspace, and task signals

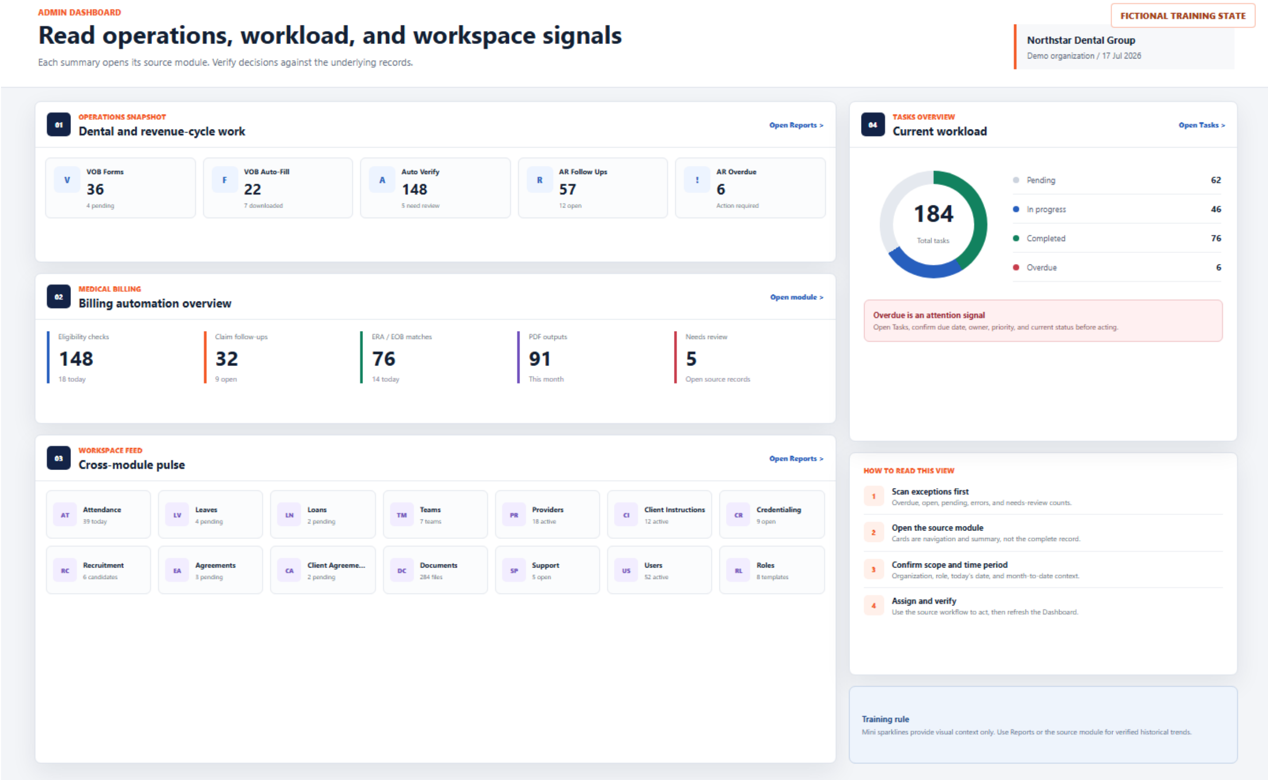

Figure 2. Fictional administrator operations map covering VOB, Auto Verify, AR, Medical Billing, Workspace Feed, and Tasks Overview.

> Scan exceptions first
> Start with overdue, pending, open, errors, and needs-review counts. Open the source before assigning or escalating.

09 / OPERATIONS SNAPSHOT

Open the correct dental or revenue-cycle source

Signal	Summary	Verify
VOB Forms	Generated/manual VOB activity	Case identity, payer, form status, output, owner
VOB Auto-Fill	Selected PDFs, parsed history, downloads	Correct file, fields, source quality, download state
Auto Verify	Verification logs and outcomes	Payer, case, date, coverage result, review state
AR Follow Ups	AR tasks plus ClaimMD follow-ups	Claim, payer, status, owner, date, match, notes
AR Overdue	Past-due non-completed AR tasks	Due date, priority, assignee, blocker, next follow-up

Protect sensitive records
Open only records required for approved work. Do not copy patient, payer, provider, or claim details into training screenshots or informal chat.

10 / MEDICAL BILLING

Use billing summaries to locate the right queue

Card	What it signals	Source check
Eligibility Checks	Eligibility activity and today where available	Payer response and verification result
Claim Follow-Ups	Follow-up activity and open/completed state	Claim match, owner, status, next action
ERA / EOB Matches	Matching activity or searches	Remittance, claim, and match confidence
PDF Outputs	Generated document activity	Correct record, date, file, and authorized destination
Needs Review	Errors or unresolved states	Investigate source; do not assume the record is wrong

Selecting a billing summary opens the Medical Billing workspace. Its response, log, status, record, and output remain authoritative.

11 / WORKSPACE FEED

Use the cross-module pulse

Group	Cards	Operator response
People	Attendance, Leaves, Loans, Teams	Open the individual person, request, or team record
Provider/client	Providers, Client Instructions	Confirm organization, practice, status, and current version
Growth/workflows	Credentialing, Recruitment	Confirm case/candidate, stage, owner, and open work
Content/contracts	Agreements, Client Agreements, Documents	Confirm version, signer, file access, and status
Support/admin	Support, Users, Roles	Open only with approved administrative responsibility

Compare like with like

A count can be normal for the current tenant and period. Do not compare one client's total against another tenant's data or target.

12 / TASKS AND REVIEW PANELS

Prioritize exceptions without acting from a count alone

1. Open Tasks and confirm due date, time zone, status, assignee, priority, steps, comments, and blockers.
2. Update only the approved owner, date, status, step, or comment, then verify the save.
3. Use Recent Activity to locate a source event; it is not a complete audit log.
4. Use Employee Status with Employees and Leaves, not as a standalone lifecycle decision.
5. Use Expense Summary with the expense record, receipt, currency, and approval path.
6. Use Leave Requests with balance, dates, handoff, status, and approval responsibility.

> Overdue is an attention signal
> Open and understand the task before reassigning, changing a due date, or escalating the person responsible.

Continue to tasks, assignments, steps, and timers

13 / OPTIONAL ANALYTICS

Read lead, outreach, and cold-calling metrics carefully

Area	Possible metrics	Do not assume
Lead Generation	Total leads, new today, emails found, forms sent	Not proof of qualification or consent
Email Outreach	Accounts, active campaigns, sent today, total sent	Not proof of delivery, reply, or conversion
Cold Calling	Calls, conversions, notes, emails, status changes, follow-ups, leaderboard	Not a substitute for call notes, quality, or legal rules

> Open the source campaign
> Confirm date range, owner, consent requirements, disposition, notes, and follow-up before reporting performance.

14 / EMPLOYEE VIEW

Use the personal Dashboard to organize your day

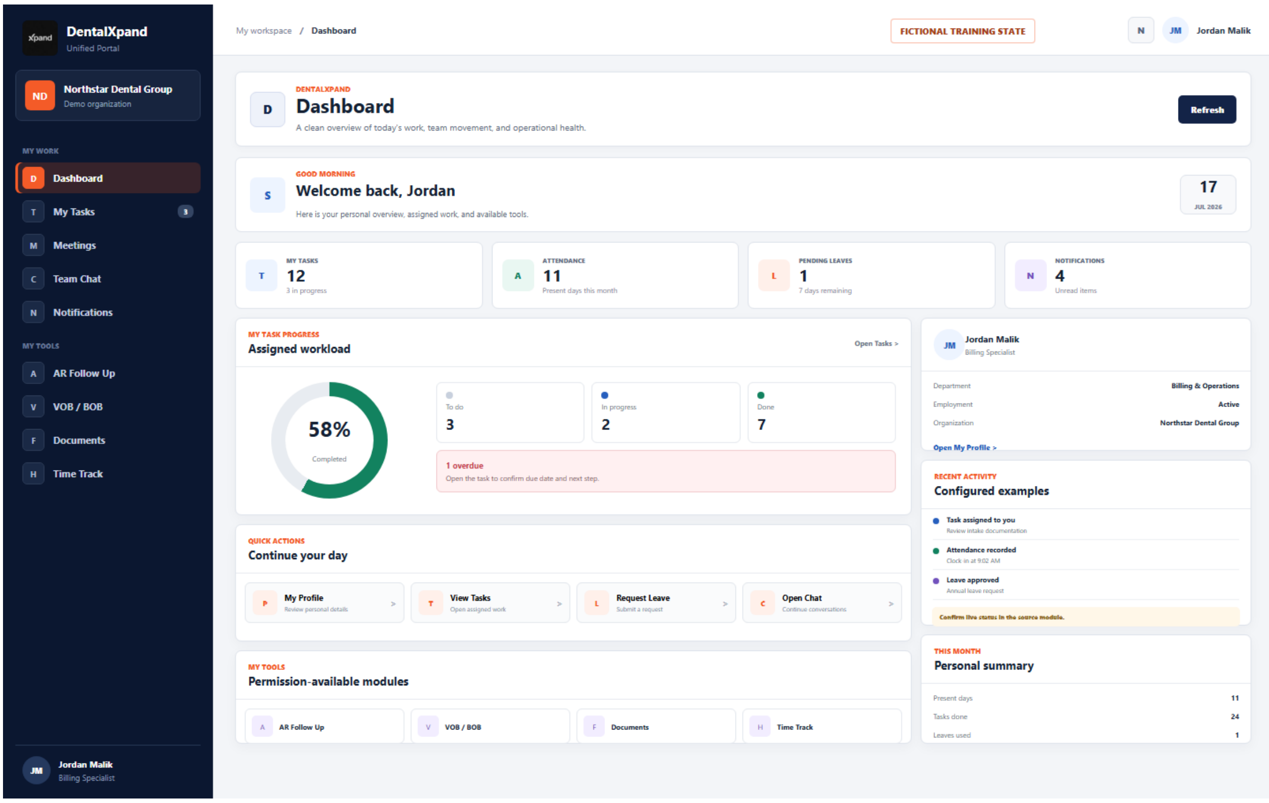

Figure 3. Fictional employee Dashboard with personal tasks, attendance, leave, notifications, quick actions, tools, profile, configured activity examples, and monthly summary.

> Personal, not organization-wide
> The employee view focuses on current-user assignments and permission-available tools.

15 / EMPLOYEE WORKFLOW

Verify each personal summary in its source

Area	Summary	Source
My Tasks	Total, to-do, in-progress, completed, overdue	My Tasks record and assignment
Attendance	Available present-day/month context	Attendance row and clock-in
Pending Leaves	Pending requests and available balance where supplied	Leaves and approved balance policy
Notifications	Unread operational alerts	Notification Center and linked source
Quick Actions	Profile, Tasks, Leave, Chat	Destination and saved action
My Tools	AR, VOB, Documents, Time Track when granted	Module permissions and records

Current employee Recent Activity is illustrative
The current panel contains configured example entries rather than a live audit feed. Confirm tasks, attendance, leave, messages, and notifications in their source modules.

16 / PROVIDER PORTAL

Use the focused provider or client Dashboard

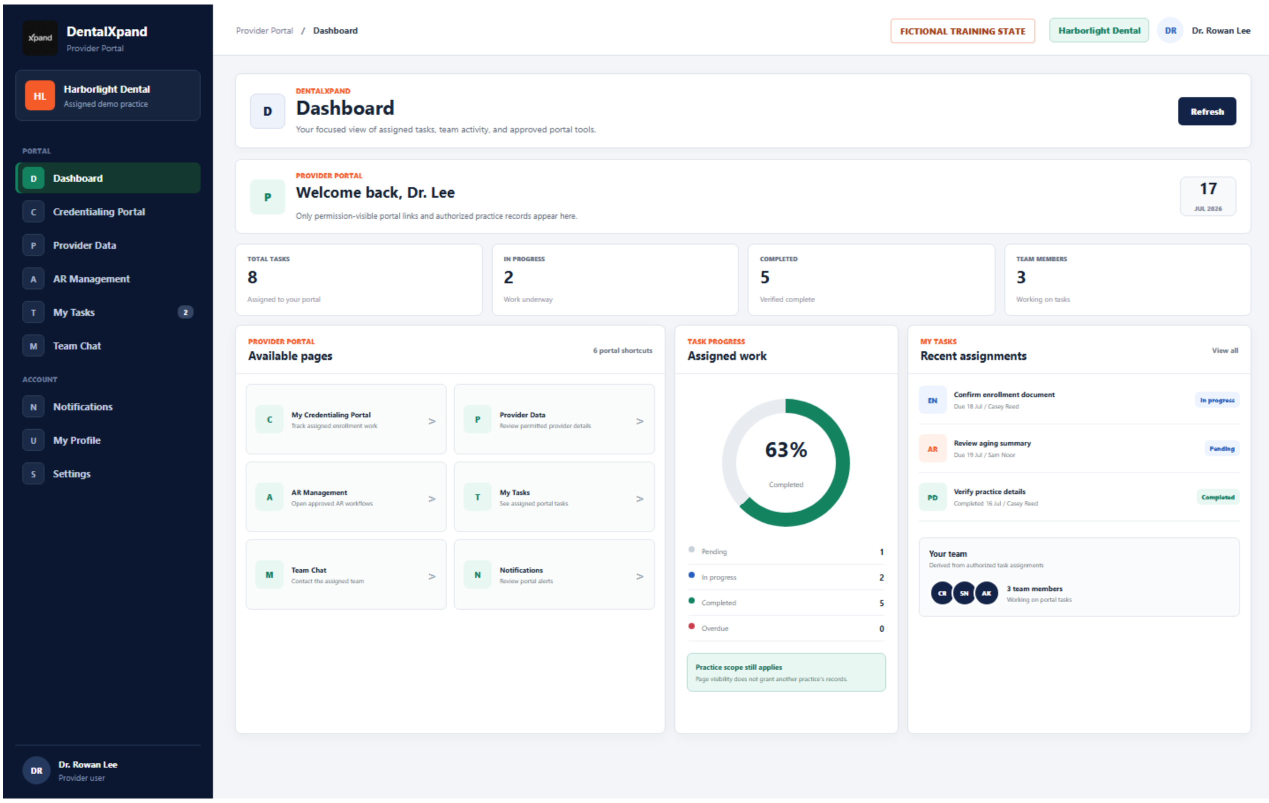

Figure 4. Fictional provider portal with permission-visible shortcuts, task progress, assigned tasks, practice context, and task-derived team members.

> **Confirm practice first**
> Stop if the organization or assigned practice is unexpected. Do not inspect more records until scope is verified.

17 / PORTAL WORKFLOW

Open only approved portal pages and assigned work

1. Confirm the provider/client identity and assigned practice context.
2. Review Total, In Progress, Completed, and Team Members for available tasks.
3. Open only permission-visible destinations such as Credentialing, Provider Data, AR, Tasks, Chat, Notifications, Profile, or Settings.
4. Use Task Progress to locate pending or overdue work, then open the task.
5. Use My Tasks for the limited recent list and View all for the complete authorized list.
6. Treat Your Team as employees derived from available task assignments, not the organization directory.

> A missing shortcut can be correct
> Portal links are permission-filtered. Request access only when the page and action are required for an approved responsibility.

Continue to provider login and the client portal

18 / PORTAL SECURITY

Keep display filtering and data isolation separate

Layer	Required boundary
Identity	Authenticated active provider/client account
Membership	Active membership in the current organization
Practice	Only assigned same-organization practices
Permission	Approved portal pages and actions
API and RLS	Every returned row restricted before it reaches the browser

> Client-side task filtering cannot prevent exposure
> The task API and row-level policies must already return only authorized tenant and practice rows. Never rely on hiding a record after download.

If another practice, client, provider, patient, employee, or organization appears, stop, avoid opening more records, sign out, and report the security incident immediately.

19 / DATA FLOW

Understand where the Dashboard becomes useful - and where it stops

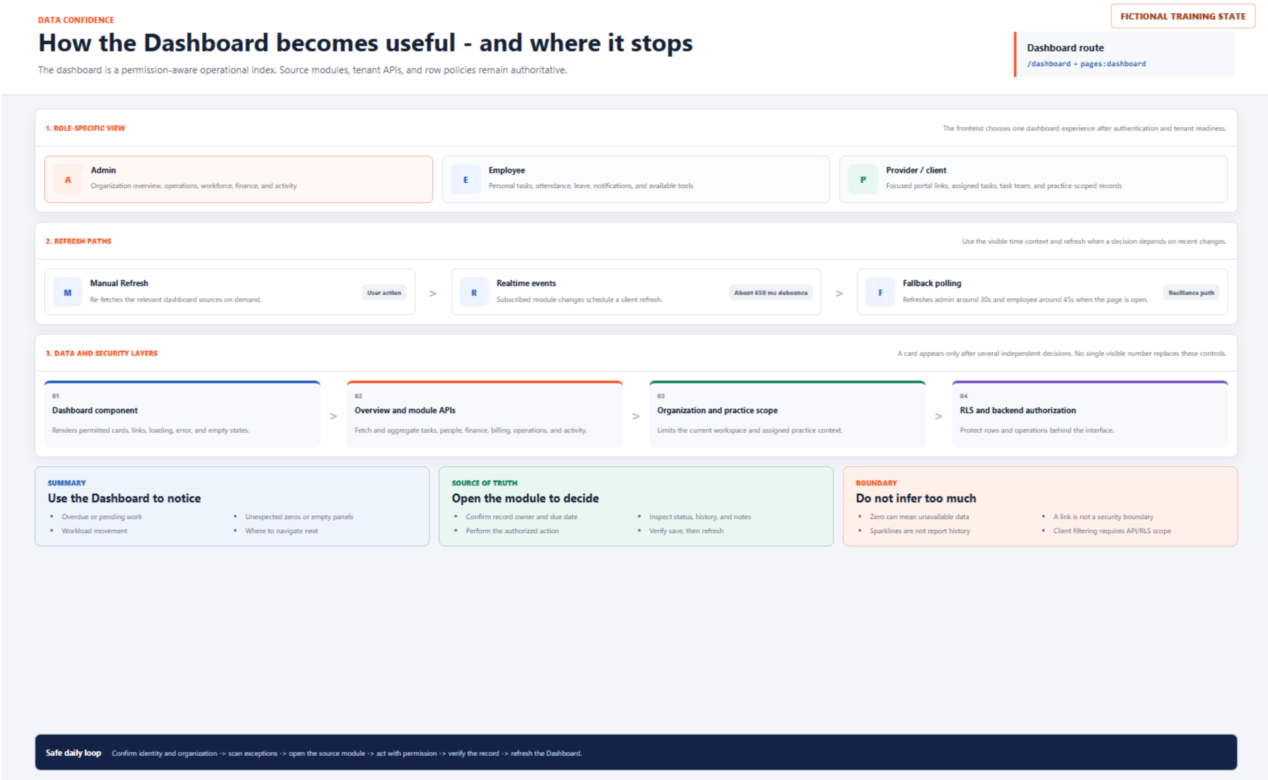

Figure 5. Fictional map of role selection, manual/realtime/fallback refresh, overview APIs, organization and practice scope, RLS, and source-of-truth decisions.

> A visible number has layers behind it
> Component rendering, API aggregation, tenant/practice scope, backend authorization, and RLS all affect what can appear.

20 / DATA CONFIDENCE

Use summaries carefully and source modules decisively

Decision	Correct use
Use Dashboard	Notice exceptions, choose the next module, compare authorized current summaries, verify movement after refresh
Use source module	Confirm record owner, date, status, history, notes, amount, file, or response
Use Reports	Verify historical trends, formal KPIs, date ranges, exports, and management decisions
Investigate zero	Check no records, source availability, status values, period, overview fields, permission, and scope

> Resilient zero needs verification
> Some admin sources return an empty contribution when a table is unavailable so one module does not always crash the overview. An unexpected zero must be checked against the source and system health.

Continue to Reports, KPIs, and management dashboards

21 / EXPECTED STATES

Read loading, failure, empty, zero, and unauthorized states correctly

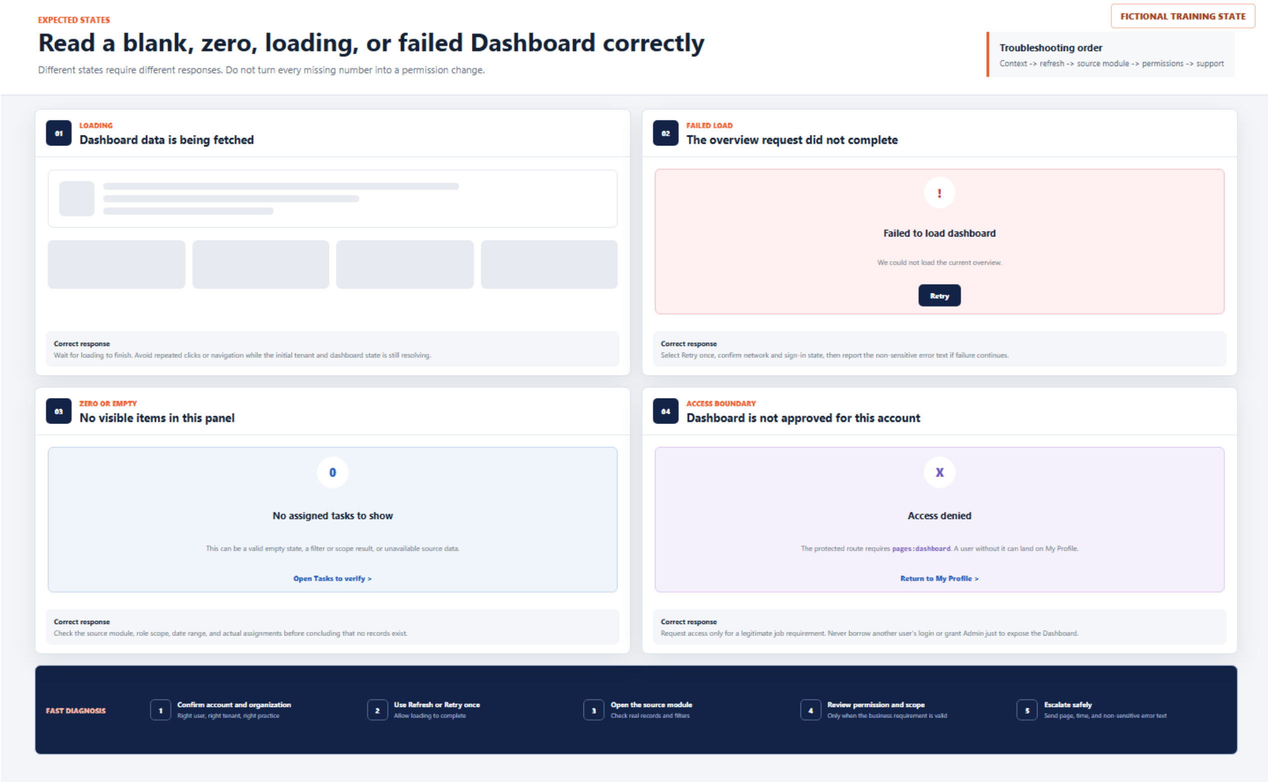

Figure 6. Fictional comparison of loading, failed load, zero/empty, and access denied states with safe first responses.

> Different states need different responses
> Do not turn every missing number, hidden shortcut, or blank panel into a permission change.

22 / STATE RESPONSE

Use the correct first response

State	Possible meaning	First response
Loading	Tenant and overview requests still resolving	Wait; avoid repeated clicks
Failed load	Overview request threw an error	Retry once; confirm network/sign-in; capture safe text
Zero	No rows, unavailable source, status mismatch, missing field, or scope	Open source; verify filters, records, date, permissions
Empty tasks/activity	No authorized recent items, no assignments, or unavailable source	Check source and assignment
Missing shortcut	Page permission or portal rule excludes destination	Confirm the legitimate requirement
Access denied	pages:dashboard unavailable	Return to Profile; request least privilege only if needed

> Retry once
> Repeated retries can hide the timing of a real failure and do not fix permission, tenant, API, or RLS problems.

23 / DAILY LOOP

Run the Dashboard command center safely

1. Sign in with your own active account and complete any required password change.
2. Confirm organization, practice, role-specific view, date, and reporting period.
3. Allow loading to complete; refresh when recent changes matter.
4. Scan overdue, pending, open, unread, errors, and needs-review signals first.
5. Select one summary, activity item, module card, or quick action.
6. Open the source and verify scope, identity, owner, status, due date, amount, history, and files as relevant.
7. Complete only the permitted action and confirm the save.
8. Return, refresh, and confirm the expected Dashboard movement.
9. Document and escalate any remaining discrepancy without exposing sensitive data.

> Expected result
> The user identifies the right work quickly, opens only authorized records, completes the action in its source module, and can explain the refreshed summary.

24 / TROUBLESHOOT ACCESS

Resolve access and loading problems without bypassing controls

Problem	Likely reason	Correct response
Dashboard missing	pages:dashboard or navigation rule	Use available page; request least privilege
Direct URL denied	Protected route rejected permission	Return safely; do not guess or borrow login
Remains loading	Tenant, auth, network, or overview unresolved	Wait, check network, refresh page once
Failed to load	Overview request threw	Retry once; report safe error text
Card opens, action fails	Action/API/ownership/scope/RLS rejected	Investigate the specific operation
Shortcut missing	Page permission or portal rule	Confirm job requirement and exact access

Never grant Admin as a diagnostic shortcut
Page access and action authorization should be repaired narrowly and verified with the affected user's own account.

25 / TROUBLESHOOT DATA

Resolve unexpected counts, activity, and tenant scope

Problem	Likely reason	Correct response
Unexpected zero	No rows, source unavailable, period/status/scope	Verify source records and system health
Count changed automatically	Realtime, polling, or another authorized update	Inspect source history before deciding
Employee activity mismatch	Configured example entries	Use Tasks, Attendance, Leave, Messages
Provider task missing	Assignment, practice, API, or RLS scope	Verify every boundary; do not broaden query
Sparkline differs from Reports	Display context, not historical query	Use Reports and source records
Another tenant/practice	Potential isolation failure	Stop, sign out, report immediately

> Escalate safely
> Send page, role, organization/practice, approximate time, expected result, non-sensitive actual text, and steps tried. Never send passwords, tokens, patient records, payer files, or unredacted screenshots.

26 / COMPLETION

Verify that this lesson is complete

- I can explain why Dashboard is an operational index and not the final record.
- I can confirm account, organization, practice, role view, date, and period.
- I know pages:dashboard protects the route.
- I can distinguish admin, employee, and provider/client views.
- I know what manual, realtime, and fallback refresh can and cannot do.
- I can open the source for workforce, task, finance, operations, billing, and workspace cards.
- I can use quick actions without assuming blanket authorization.
- I know employee Recent Activity currently contains configured examples.
- I understand portal filtering does not replace backend and RLS isolation.
- I can distinguish loading, failed, empty, zero, missing-link, and denied states.
- I know sparklines are not verified historical reports.
- I can run context -> scan -> source -> action -> save -> refresh -> verify.
- I can report a cross-tenant or cross-practice concern immediately and safely.

> Ready for task training
> The next lesson covers tasks, assignments, steps, comments, timers, and time logs in detail.

27 / CONTINUE

Continue through DentalXpand learning

Previous lesson	Next lesson	All resources
Previous lesson	Next lesson	All resources

Related lessons

- Navigate sections and pin frequent tools
- Understand organization and practice context
- Use Reports, KPIs, and management dashboards
- Use provider login and the client portal
- Understand roles, permissions, and access boundaries

Website guide: Use the Dashboard command center
Support: support@xpand.dental
Website: xpand.dental