# **Multiple Dashboard Views**

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Multiple Dashboard Views is currently in beta.

## Create a dashboard | Manage dashboards | Edit a dashboard

Create multiple, customized **Dashboard** tailored to different work roles, offering your team greater flexibility and focus. Customize your **Dashboard** to match how you work and what matters most.

- Front office: Daily view highlighting schedules, patient check-ins, open tasks, and unread messages to efficiently manage patient flow.
- Billing staff: Financial view to monitor outstanding claims, denials, and account balances—no extra navigation needed
- **Providers:** Personalized dashboards focusing on their schedules, clinical tasks, and incoming messages, so they always have critical information at their fingertips.

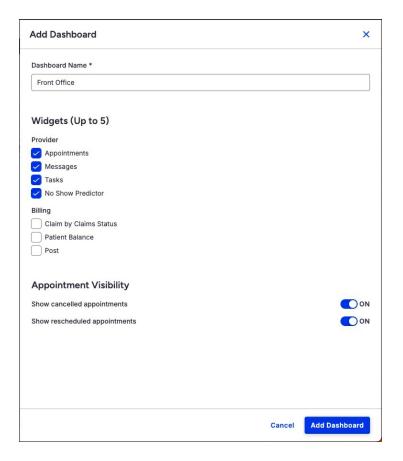
### Create a dashboard

- 1. Select Schedule > Dashboard.
- 2. Select the plus icon +.

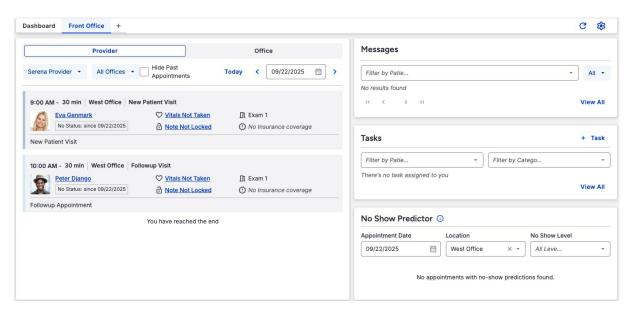


The Add Dashboard side panel opens.

3. Enter the dashboard's name, select the widgets you want to show, and select Add Dashboard.



The Front Office dashboard we just created appears as a tab next to the default Dashboard.



## **Manage Dashboards**

You can manage which dashboards are shown and customize the order in which they appear.

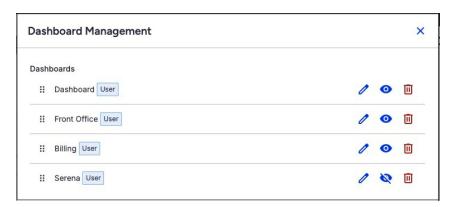
Select the gear icon to open the **Dashboard Management** side panel.

You can perform the following actions:

- Hover over the drag dots icon :: (the cursor changes to a grab cursor) and then drag and drop to reorder the dashboard list.
  - The list appears from left to right on the **Dashboard** in the same order as it is shown from top to bottom

#### in this list.

- Select the pencil icon / for the specific dashboard to edit it.
- Select the eye or crossed-out eye to icon to hide or show the dashboard, respectively.
- Select the trash can icon iii to delete a dashboard.



## Edit a dashboard

- 1. Select the gear icon 🤨 to open the **Dashboard Management** side panel.
- 2. Select the pencil icon of for the specific dashboard.
- 3. Make your changes and select **Save Dashboard**.

