

Multiple Dashboard Views

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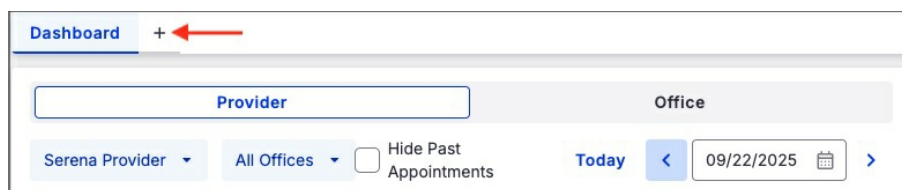
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You can create multiple, customized **Dashboard** views to align with different work roles, offering greater flexibility. Each view can be tailored to suit your and your team's specific needs.

- **Front office staff** can use a daily view that highlights the schedule, patient check-ins, open tasks, and unread messages to efficiently manage patient flow.
- **Billing staff** can create a financial view to monitor outstanding claims, denials, and account balances—without needing to navigate through other areas of the system.
- **Providers** can design their own dashboards, focusing on their schedules, clinical tasks, and incoming messages, so they always have the right information readily available.

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**.

Add Dashboard

Dashboard Name *

Front Office

Widgets (Up to 5)

Provider

☒ Appointments
☒ Messages
☒ Tasks
☒ No Show Predictor

Billing

☐ Claim by Claims Status
☐ Patient Balance
☐ Post

Appointment Visibility

Show cancelled appointments

ON

Show rescheduled appointments

ON

Cancel
Add Dashboard

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

Dashboard
Front Office
+

Provider

Office

Serena Provider
All Offices
☐ Hide Past Appointments
Today
09/22/2025

9:00 AM - 30 min | West Office | New Patient Visit

Eva Genmark

No Status: since 09/22/2025

Vitals Not Taken

Note Not Locked

Exam 1

No Insurance coverage

New Patient Visit

10:00 AM - 30 min | West Office | Followup Visit

Peter Django

No Status: since 09/22/2025

Vitals Not Taken

Note Not Locked

Exam 1

No Insurance coverage

Followup Appointment

You have reached the end

Messages

Filter by Patie...
All

No results found

View All

Tasks
+ Task

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

There's no task assigned to you

View All

No Show Predictor


Appointment Date
Location
No Show Level

09/22/2025
West Office
All Leve...


No appointments with no-show predictions found.

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

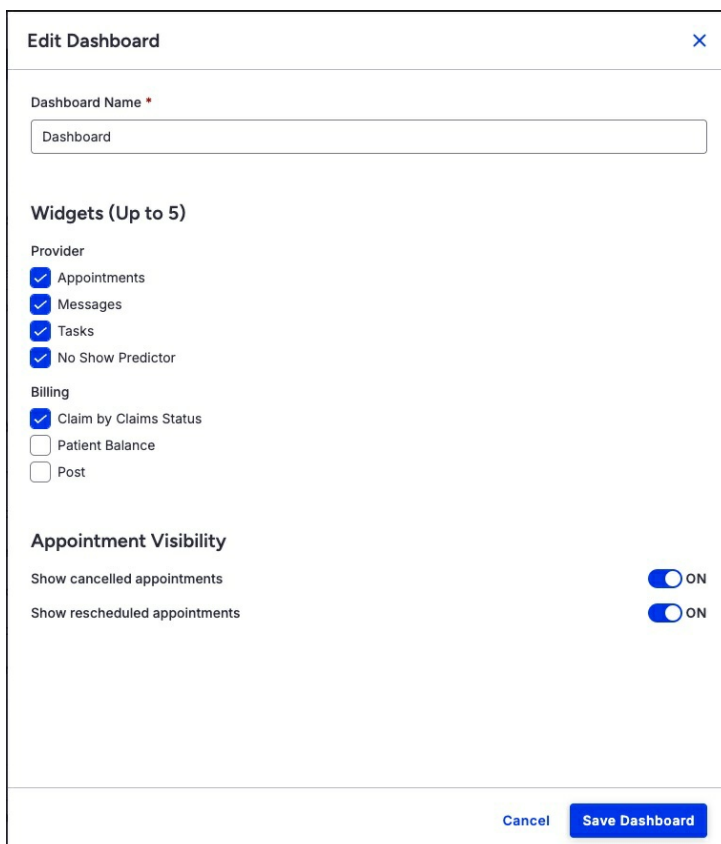
in this list.

- Select the pencil icon  for the specific dashboard to [edit it](#).
- Select the eye  or crossed-out eye  icon to hide or show the dashboard, respectively.
- Select the trash can icon  to delete a dashboard.



Edit a dashboard

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

A screenshot of an 'Edit Dashboard' form. It has a title bar with a close button (X). The form contains several sections: 'Dashboard Name' with a text input field containing 'Dashboard'; 'Widgets (Up to 5)' with two sub-sections: 'Provider' (with checkboxes for Appointments, Messages, Tasks, and No Show Predictor, all checked) and 'Billing' (with checkboxes for Claim by Claims Status, Patient Balance, and Post, with Claim by Claims Status checked); 'Appointment Visibility' with two toggle switches: 'Show cancelled appointments' and 'Show rescheduled appointments', both set to 'ON'. At the bottom right, there are two buttons: 'Cancel' and 'Save Dashboard'.