Multiple Dashboard Views

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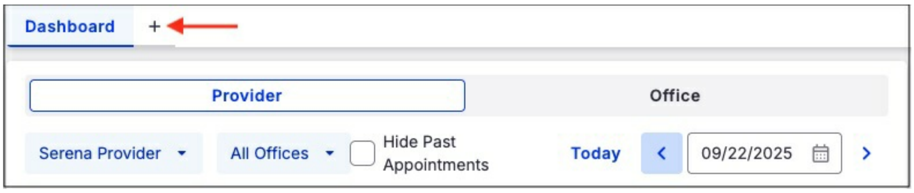
You can create multiple, customized **Dashboard** views to align with different work roles, offering greater flexibility. Each view can be tailored to suit your and your team's specific needs.

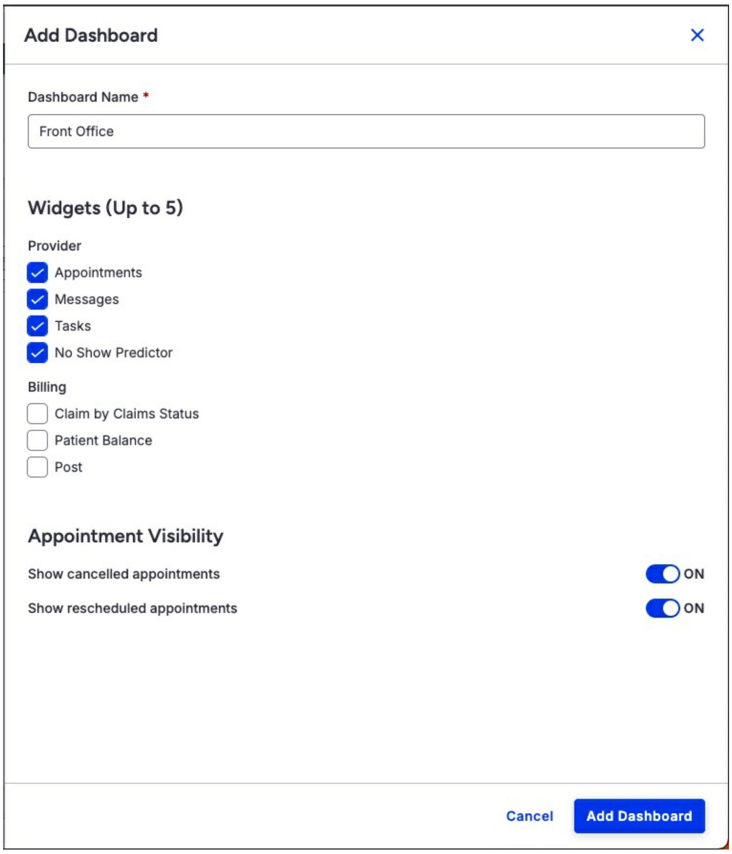
- **Front office staff** can use a daily view that highlights the schedule, patient check-ins, open tasks, and unread messages to efficiently manage patient flow.
- **Billing staff** can create a financial view to monitor outstanding claims, denials, and account balances—without needing to navigate through 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

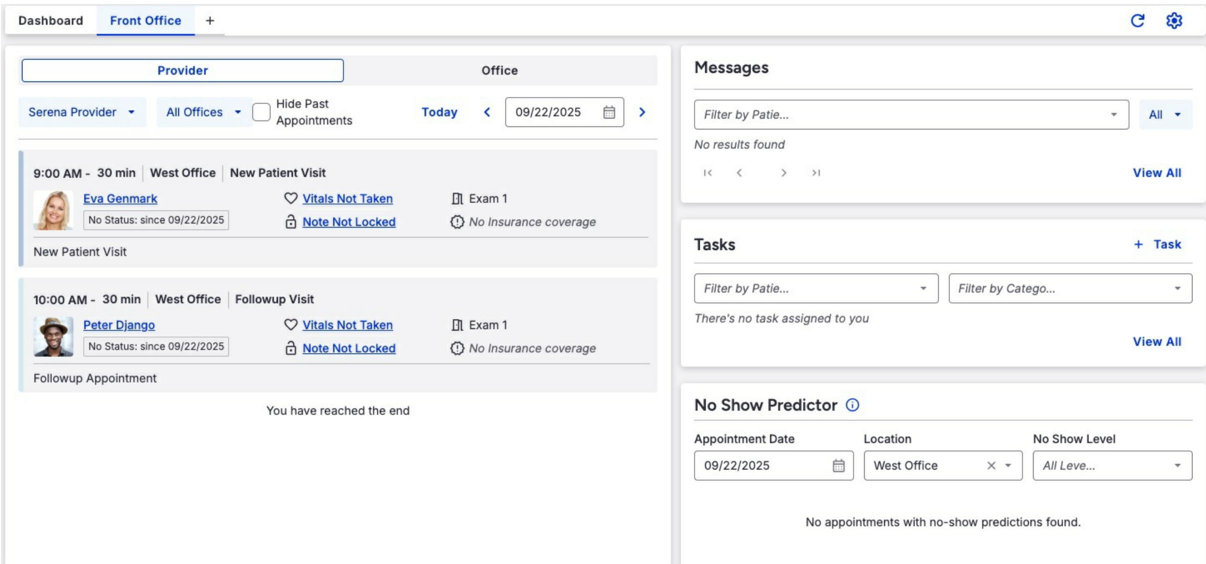
1. Select **Schedule** > **Dashboard**.
2. Select the plus icon **+**.

   The **Add Dashboard** side panel opens.
3. Enter the dashboard's name, select the widgets you want to show, and select **Add Dashboard**.



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 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**.