

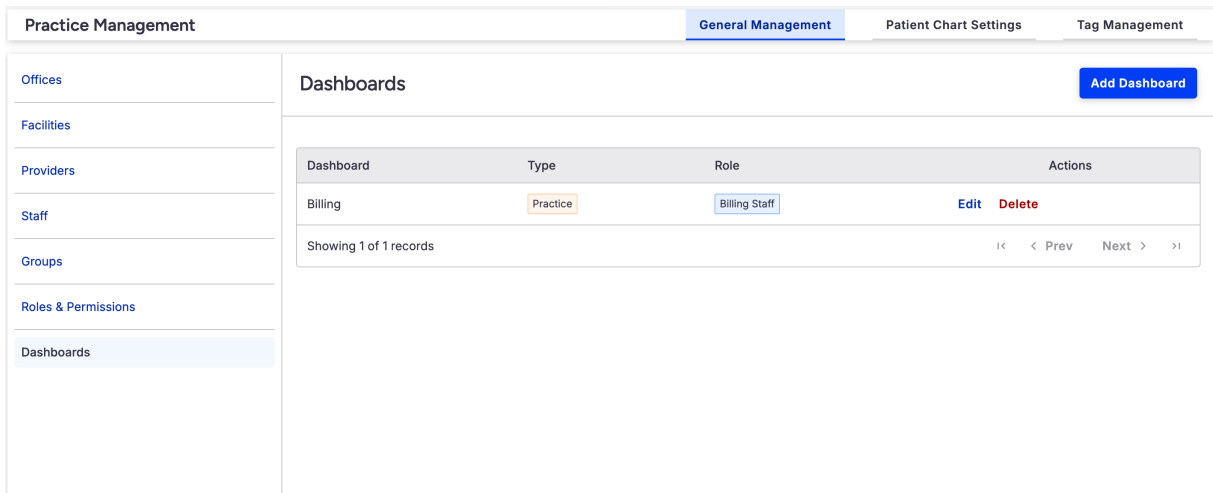
Create Practice Dashboards

Last modified on 05/13/2026 6:45 pm EDT

The practice administrator controls practice dashboards and grants access by role or practice group. This feature helps practice groups maintain consistent, role-based views across their teams.

Create a practice dashboard

1. Select **Account > Practice Management > General Management > Dashboards**.
2. Select **Add Dashboard** to open the **Add Dashboard** drawer.



The screenshot shows the 'Practice Management' interface with the 'Dashboards' section active. The left sidebar contains navigation links for Offices, Facilities, Providers, Staff, Groups, Roles & Permissions, and Dashboards. The main content area displays a table of dashboards with the following data:

Dashboard	Type	Role	Actions
Billing	Practice	Billing Staff	Edit Delete

Below the table, it indicates 'Showing 1 of 1 records' and includes pagination controls: '< < Prev Next > >|'. An 'Add Dashboard' button is located in the top right corner of the Dashboards section.

3. Enter the dashboard's name, choose which roles can access it, select the widgets you want to show, and then select **Add Dashboard**.

The appointment visibility options are only available when you select the **Appointments** widget.

Add Dashboard ✕

Dashboard Name *

Role
Leave blank to grant access to everyone for this dashboard.

Widgets (Up to 5)

Provider

- Appointments
- Messages
- Tasks
- No Show Predictor

Billing

- Claim by Claims Status
- Patient Balance
- Post

Appointment Visibility

Show cancelled appointments

Show rescheduled appointments

[Cancel](#) [Add Dashboard](#)

The newly created front office practice dashboard appears on the dashboard list. Users with the Office Manager or Staff roles can access this new dashboard.

Dashboards [Add Dashboard](#)

Dashboard	Type	Role	Actions
Billing	Practice	Billing Staff	Edit Delete
Front Office (Scheduling)	Practice	Office Manager Staff	Edit Delete

Showing 2 of 2 records ⏪ < Prev Next > ⏩

You can access practice dashboards from the **Dashboard (Schedule > Dashboard)**.

Dashboard Serena's Front Office Serena's Billing Billing **Front Office (Scheduling)** + 🔄 ⚙️

Provider **Office**

Hannah Provider ▾ All Offices ▾ Hide Past Appointments Today < 03/25/2026 📅 >

No Appointments available

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

03/25/2026 📅 West Office ✕ ▾ All Leve... ▾

Practice Group ID: █████ Support PIN: **** 🔗 Help 📄 Updates 📖 Knowledge Base 🛒 Marketplace 🗨 Practice Chat

