

# Create Practice Dashboards

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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**.

The screenshot shows the 'Practice Management' interface with the 'General Management' tab selected. On the left is a sidebar menu with options: Offices, Facilities, Providers, Staff, Groups, Roles & Permissions, and Dashboards. The main content area is titled 'Dashboards' and includes an 'Add Dashboard' button. Below this is a table 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 > >|'.

The **Add Dashboard** side panel opens.

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 dashboard.

### Dashboards Add Dashboard

Dashboard	Type	Role	Actions
Billing	Practice	Billing Staff	<a href="#">Edit</a> <a href="#">Delete</a>
Front Office (Scheduling)	Practice	Office Manager Staff	<a href="#">Edit</a> <a href="#">Delete</a>

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)** + 🔄 ⚙️

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**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

