

# Create User Dashboards

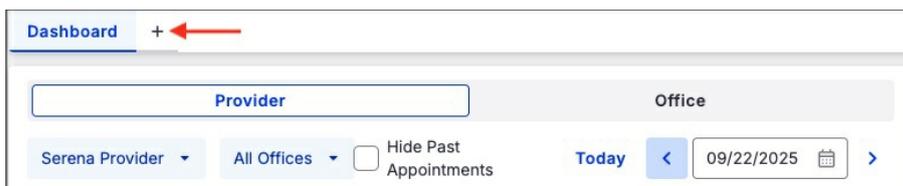
Last modified on 03/25/2026 1:49 pm EDT

Create multiple custom dashboards to give your team more flexibility and focus. Tailor each dashboard to fit your workflow and priorities. If you have multiple roles (for example, scheduler and biller), you can create separate personal dashboards for each.

- **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 user 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 appointment visibility options only show when you select the **Appointments** widget.

### Add Dashboard ✕

Dashboard Name \*

**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.

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](#)

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](#)

You have reached the end

#### Messages

All ▾

No results found

< < > >
[View All](#)

#### Tasks

[+ Task](#)

There's no task assigned to you

[View All](#)

#### No Show Predictor ⓘ

Appointment Date	Location	No Show Level
09/22/2025 <span style="float: right;">📅</span>	West Office <span style="float: right;">✕ ▾</span>	All Leve... <span style="float: right;">▾</span>

No appointments with no-show predictions found.