Getting Started - Practice & Role Required Settings

Last Modified on 07/25/2024 1:08 pm EDT

This article explains required practice/role setup for the the Check In-Out Dashboard.

Practice Setup checklist:

- **Required: Set up Role 1** 'Check In/Out Dashboard' - **this role provides users with the Check In/Out icon on the iScheduler toolbar**
- ***Optional:*** Set up Role 2 'Check In/Out Dashboard Shared' - we highly recommend limiting assignment of this role to prevent over-creation of Shared Appointment Filters

Role Setup Details

There are two roles that are associated with the Check In-Out Dashboard:

Required Role 1: Check In/Out Dashboard - this is a general role that provides users with dashboard access using the Check In/Out icon on the iScheduler toolbar. *Any user that will work in the dashboard will need this role in order to access the Check In/Out Dashboard.*

***Optional* Role 2:** Check In/Out Dashboard Shared - this should be a very limited role to prevent over-creation of Shared Appointment Filters in the dashboard. This role will control which users can create Check In-Out Dashboard Filters that are shared for the practice. This helps to keep shared filters under control to prevent list that are too long for users to efficiently navigate. Only those users that can create Shared dashboard filters will be able to edit those shared filters.