

Staff and Provider Permissions

07/24/2024 9:21 pm EDT

DrChrono has a variety of permissions that can grant or restrict access to different areas of the system.

Permissions can be found under **Account > Staff Permissions > Permissions** tab.

Permissions Administration ?

Name	Description
Create and Update Patients	Allow the user to create and update patient information
Access Scheduling	Allow the user to view, add, and edit patient appointments and other scheduling features
Appointment Provider Selection	Allow the user to schedule appointments for all providers in the practice group
Use iPad EHR	Allow the user to access the iPad EHR system
Access to Message Center	Allow the user to access the message center
Create and Update Contacts	Allow the user to create, update, and remove contacts
Access Clinical Notes	Allow the user to view and interact with the clinical notes components
Sign/Lock Clinical Notes	Allow the user to sign and lock clinical notes
Drug Interactions Check	Allow the user to perform drug interaction checks
Access to eRx	Allow access to eRx screens
Access Billing	Allow the user to view and interact with the billing system

This article describes the permissions. Click on a permission in the table below to jump to that specific permission.

Create and Update Patients	Access Scheduling	Appointment Provider Selection	Use iPad EHR	Access to Message Center
Create and Update Contacts	Access Clinical Notes	Sign/Lock Clinical Notes	Archived Signed Consent Forms	Drug Interactions Check
Access to eRx	Access Billing	Access Patient Payments	Access Patient Analytics	Provider Dropdown
View Practice Group	Share Patients	Access Reports	Settings	Export Patients
Manage Permissions	Manage Templates	Manage Accounts	Show Patient Balance	Show Billing Tab
Show Billing Summary	Add new referring sources	Access Institutional Billing	Access All Messages for Practice Group	Billing Administrator
Access Balance/Ledger	Access Patient Statements	Emergency Access	EHI Export	Break the Glass Review
SAML SSO Admin Dashboard	ePS Enrollment (Edit)	ePS Enrollment (Read Only)	Manage Form Tags	Disable Send to All Patients Option

In most cases, when permission is not enabled for a user, they will receive a **Permission Denied** message when trying to access something they do not have permission to interact with.

Permission Denied

You don't have permission to view this page.

Create and Update Patients

When Enabled	When Disabled
<p>Allows users to create patients and grant access to patient charts. Without this permission, users will not be able to access ANY patient charts or add patients in the appointment window.</p>	<p>A user that does not have this permission will not see the add new patient, edit patient or send OnPatient invite icons () in the appointment window.</p> <p>While the New Patient check box is visible, if a user, without this permission enabled, tries to add a patient, they will receive an error message. They will also receive a permission denied message if they try to click on a patient's name in the message center, nor will they be able to attach documents to a patient chart.</p>

With create and update patients permission enabled

The screenshot shows the 'Schedule Appointment' form with the 'New Patient' checkbox checked and visible. A black arrow points to the 'Add' (+) icon next to the Patient field.

Without create and update patients permission enabled

The screenshot shows the 'Schedule Appointment' form with the 'New Patient' checkbox disabled and hidden. A black arrow points to the 'Add' (+) icon next to the Patient field, which is not visible.

Access Scheduling

When Enabled	When Disabled
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Allows users to access the schedule as well as view and schedule appointments.

If this permission is disabled for a user, they will not be able to see or access any appointments for the patient.

Note: Staff accounts will need to land on the **Dashboard** screen when they log in. Otherwise, the user will not be able to access DrChrono after logging in because they are unable to access the schedule.

To set this up, navigate to **Account > Account Settings > General** tab and make sure the **Use new dashboard home screen** is checked.

Appointment Provider Selection

When Enabled

Allows users to schedule for all providers in the practice group.

When Disabled

If this permission is disabled, the user will **ONLY** be able to schedule for the **Primary Provider** listed on their staff account settings.

With Appointment Provider Selection permission enabled

The screenshot shows the 'Schedule Appointment' form with the 'Provider' dropdown menu open. The dropdown lists 'James Smith' and 'Brendan Wilberton'. An arrow points to 'Brendan Wilberton'. The form includes fields for Patient (Jenny (Jen) Harris - 02/11/1980), Office (Primary Office), Profile, Exam (Exam 1), Color, Status, Duration (30 minutes), and Scheduled time (04/27/2021 01:30PM). There are also checkboxes for 'Recurring Appointment', 'Arrange a Follow-up Reminder', and 'View Active Reminders'.

Without Appointment Provider Selection permission enabled

The screenshot shows the 'Schedule Appointment' form with the 'Provider' dropdown menu disabled. The form includes fields for Patient (Jenny (Jen) Harris - 02/11/1980), Office (Primary Office), Profile, Exam (Exam 1), Color, Status, Duration (30 minutes), and Scheduled time (04/27/2021 01:30PM). There are also checkboxes for 'Recurring Appointment', 'Arrange a Follow-up Reminder', and 'View Active Reminders'.

Edit Office Staff

The screenshot shows the 'Edit Office Staff' form. The 'Primary Provider' dropdown menu is set to 'Brendan Wilberton'. Other fields include First name (Nick), Last name (Riviera), Email address, Username (hidnick), Home phone, Cell phone ((555) 555-6425), Send daily billing report?, iPad unlock code (7206), Restrict offices?, and Use new dashboard? (checked).

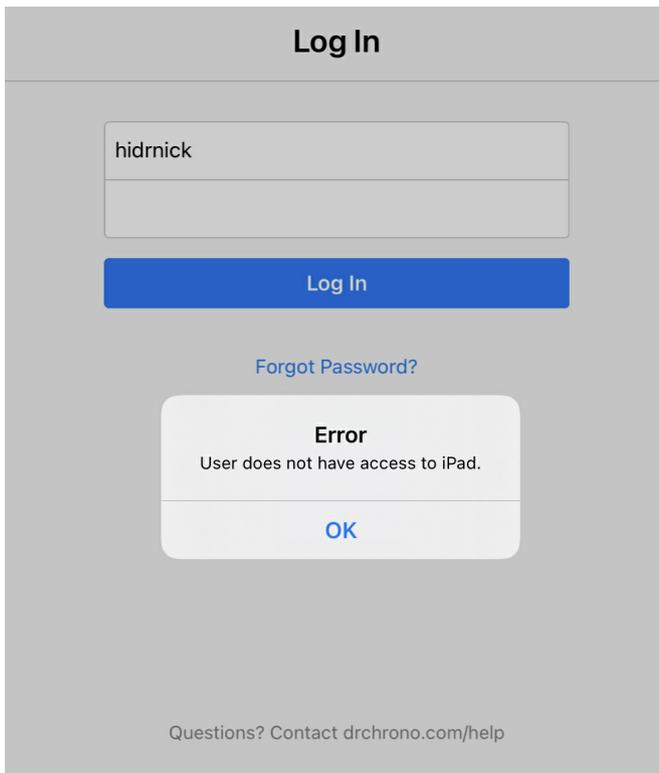
Use iPad EHR

When Enabled

Allows users to log in and use the EHR App for iPhone and iPad.

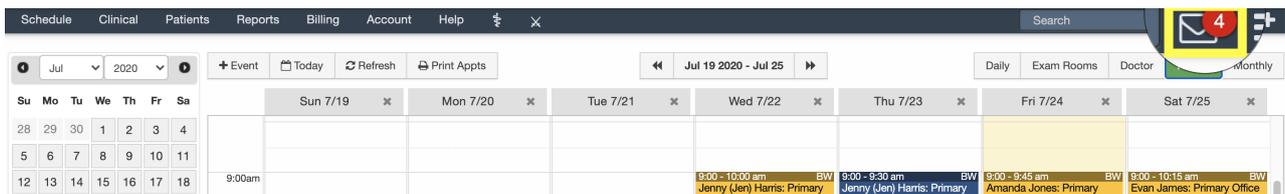
When Disabled

Without this permission enabled, users will receive an error message when attempting to log in to the app.



Access to Message Center

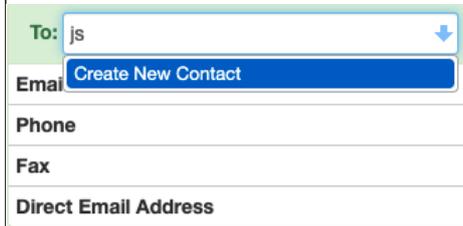
When Enabled	When Disabled
<p>Grants the user access to the Message Center () along with faxing/messaging capabilities from the patient chart and clinical note, allowing them to:</p> <ul style="list-style-type: none"> • view messages • fax documents • send referrals 	<p>If this permission is disabled for the user, they will not be able to access the Message Center () or complete any of the tasks mentioned in the Enabled description while in the message and/or the patient's chart.</p>



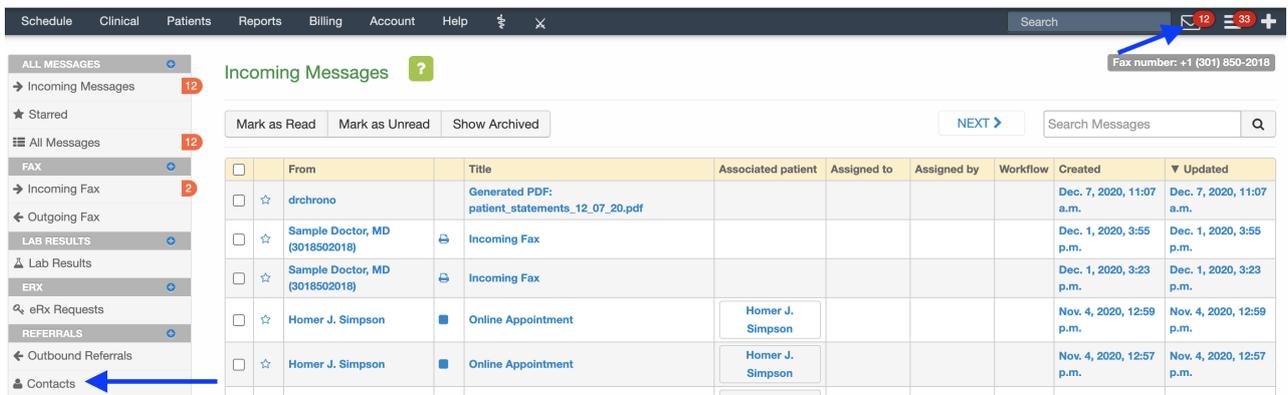
Create and Update Contacts

When Enabled	When Disabled

Allows the user to add contacts to the account in the **Message Center** () > **Contacts** and the **Create New Contact** option when sending a referral.



Users will not be able to access the **Contacts** section in the account and will receive a **Permission Denied** error message. The user is also unable to add contacts when sending a referral through the **Create New Contact** option. The window to enter contact information will not open for the user.



	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated PDF: patient_statements_12_07_20.pdf					Dec. 7, 2020, 11:07 a.m.	Dec. 7, 2020, 11:07 a.m.
<input type="checkbox"/>	Sample Doctor, MD (3018502018)	Incoming Fax					Dec. 1, 2020, 3:55 p.m.	Dec. 1, 2020, 3:55 p.m.
<input type="checkbox"/>	Sample Doctor, MD (3018502018)	Incoming Fax					Dec. 1, 2020, 3:23 p.m.	Dec. 1, 2020, 3:23 p.m.
<input type="checkbox"/>	Homer J. Simpson	Online Appointment	Homer J. Simpson				Nov. 4, 2020, 12:59 p.m.	Nov. 4, 2020, 12:59 p.m.
<input type="checkbox"/>	Homer J. Simpson	Online Appointment	Homer J. Simpson				Nov. 4, 2020, 12:57 p.m.	Nov. 4, 2020, 12:57 p.m.

Access Clinical Notes

When Enabled

Allows the user to access and view clinical notes in various areas of DrChrono.

When Disabled

Users will receive a **Permission Denied** message when trying to view clinical notes in:

- The appointment window (both on the schedule and in the patient's chart)
- Clinical > Clinical Notes
- Live Claims Feed

Scheduled Time	Provider	Reason	Notes	Office	Exam Room	Appointment Status	Billing Status	# Reminders	Profile	Actions
Tue Apr 27, 2021 1:30p.m.	Brendan Wilberton			Primary Office	Exam 1			0		Edit Appointment Edit Note

Clinical Patients Reports

FORM TOOLS

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons
- Document Management

CLINICAL

- Clinical Notes**
- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

Jenny (Jen) Harris - 04/27/2021
Primary Office [11] - Exam 1

View Service + EOB SuperBill Clinical Note

Billing Status ICD-10 Pt Payment \$ 0 Copay: \$20.00 Payment Profile Cash Pt Payment Due

Schedule Appointment

Appointment Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Type Appointment Video Visit Walk-in Transition of Care Referral

WARNING: This patient is pre-populated sample data. Patient Statement Balance: \$350.00 Generate Statement Balance: \$350.00 11 past appointments

Primary Insurance: UnitedHealthcare [87726]

Provider: Brendan Wilberton Patient: Michelle Harris - 10/14/1999 Reason: Scheduled: 03/31/2021 Time: 12:20PM Duration: 30 minutes Allow overlapping Notes: Consent Forms: Office: Primary Office Profile: Eligibility Profile: Exam: Exam 1 Color: Status: 0h 1m

[View Clinical Note](#) [View All Appointments](#)

Recurring Appointment Arrange a Follow-up Reminder View Active Reminders:

Delete Save & Close Save Cancel

Sign/Lock Clinical Notes

When Enabled	When Disabled
<p>Allows the user to sign and lock clinical notes. The Sign & Lock button will appear when the note is previewed.</p> <p>Note: If Sign/Lock Clinical Notes is enabled for a staff user, they are able to sign and lock clinical notes. However, ONLY the provider's name will appear on the note, not the user's.</p>	<p>The user will not have a Sign & Lock button available to them when they preview a note.</p>

With Sign/Lock Clinical Notes Permission Enabled

+ Amendments Revisions View Fax Sign & lock Edit Sections Print sections

Without Sign/Lock Clinical Notes Permission Enabled

+ Amendments Revisions View Fax Edit Sections Print sections

Archived Signed Consent Forms

When Enabled	When Disabled
<p>Allows access to the user to archive signed consent forms.</p> <p>Archiving Signed Consent Forms</p>	<p>The user will not be able to archive signed consent forms.</p>

With Archive Signed Consent Forms Enabled

Consent Form | **Date of Appointment** | **Date of Signature** | **Archive**
 HPI/A Data Use Agreement | May 16, 2023 9:15 AM | May 17, 2023 9:15 AM | [Fax Consent Form](#) | [Fax Signature](#) | [Send to onpatient](#) | [Archive Consent Form](#)
 HPI/A Data Use Agreement | May 16, 2023 9:15 AM | May 17, 2023 9:15 AM | [Fax Consent Form](#) | [Fax Signature](#) | [Send to onpatient](#) | [Archive Consent Form](#)
 No Show Policy | May 16, 2023 9:15 AM | May 17, 2023 9:15 AM | [Fax Consent Form](#) | [Fax Signature](#) | [Send to onpatient](#) | [Archive Consent Form](#)

Without Archive Signed Consent Forms Enabled

Consent Form | **Date of Appointment** | **Date of Signature** | **Actions**
 HPI/A Data Use Agreement | Jun 15, 2023 1:00 PM | Jun 15, 2023 7:51 AM | [Fax Consent Form](#) | [Fax Signature](#) | [Send to onpatient](#)
 No Show Policy | Jun 15, 2023 1:00 PM | Jun 15, 2023 7:51 AM | [Fax Consent Form](#) | [Fax Signature](#) | [Send to onpatient](#)

Drug Interactions Check

When Enabled	When Disabled
Allows access to the Drug Interactions section in the patient's chart or clinical note.	N/A

- Tasks (9)
- Problem List (16)
- Medication List (10)
- Send eRx
- Allergy List (4)
- Drug Interactions (8)**
- CQMs
- Intake Data
- Lab Orders
- Immunizations

Drug-Drug Interactions and Drug-Allergy Interactions

Risk	Severity	Drug 1	Drug 2	Interaction Summary
X	Patient Allergic Interaction	aspirin	Patient Allergy	
D	Major	aspirin	celecoxib	Aspirin may enhance the adverse/toxic effect of Nonsteroidal Anti-Inflammatory Agents (COX-2 Selective). more
C	Moderate	oxymetazoline nasal	phenentermine	Sympathomimetics may enhance the adverse/toxic effect of other Sympathomimetics. more
C	Moderate	prochlorperazine	phenentermine	Antipsychotic Agents may diminish the stimulatory effect of Amphetamines. more
C	Moderate	LORazepam	prochlorperazine	CNS Depressants may enhance the adverse/toxic effect of other CNS Depressants. more
C	Moderate	prochlorperazine	cetirizine	Anticholinergic Agents may enhance the adverse/toxic effect of other Anticholinergic Agents. more
C	Minor	phenentermine	cetirizine	Amphetamines may diminish the sedative effect of Antihistamines. more
B	Minor	LORazepam	levonorgestrel	Progestins (Contraceptive) may decrease the serum concentration of Benzodiazepines (metabolized by glucuronidation). more

A: No known interaction | B: No action needed | C: Monitor therapy | D: Consider therapy modification | X: Avoid combination

Access to eRx

When Enabled	When Disabled
Allows access to the Send eRx function in the patient's chart. Grants the ability to prescribe medications. Note: If Send eRx is enabled for a staff user, they are able to send prescriptions. However, ONLY the provider's name will appear on the prescription, not the user's. This setting also provides access to the eRx Settings under the account menu.	Access to the Send eRx and eRx Settings feature is restricted, and a Permission Denied message will be displayed.

ACCOUNT SETTINGS

- User Settings
- Provider Settings
- onpatient Settings
- Account Setup
- Custom Fields
- Copy Dashboard (Beta)
- API
- App Directory

PRACTICE SETTINGS

- Offices
- Facilities
- Staff Members
- Staff Permissions
- eRx Settings**

Access Billing

When Enabled	When Disabled
Allows access to billing information Billing menu.	Access to the Billing menu will result in error messages, and the options will not load. Users can still enter codes under the Billing tab in the appointment window and clinical notes.

BILLING

- Billing Summary
- Live Claims Feed
- Patient Payments (Beta)
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Accounts Receivable
- Patient Statements
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

CODING

- Code Search
 - New Custom Procedure
 - Custom Procedures
- ENROLLMENTS**
- Bulk Edit Payer IDs
 - Insurance Setup
 - Payer Search

The screenshot shows a sidebar menu with the following items: Live Claims Feed, Patient Payments (beta), Day Sheet, Transactions, Remittance Reports, Unmatched ERAs, and Accounts Receivable. Three error messages are overlaid on the top right of the menu:

- Something is broken: unknown error (403)
- Unable to retrieve response for the request
- [close all]

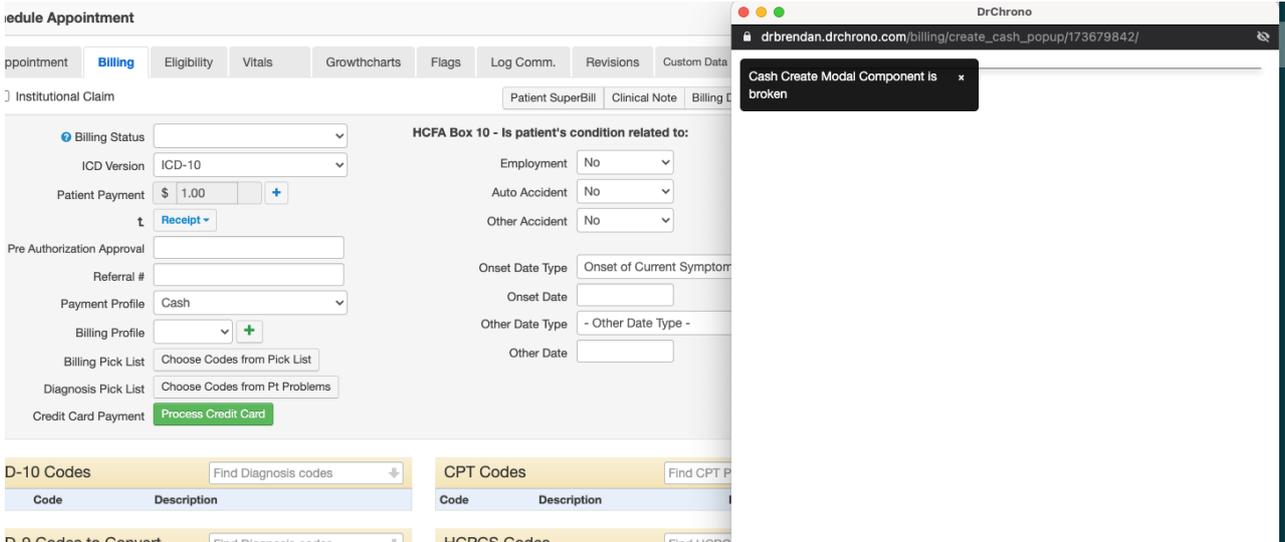
Access Patient Payments

When Enabled	When Disabled
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Allows the user to enter and process payments in the appointment window, patient's chart/patient payments, the Live Claims Feed, and the EHR app.

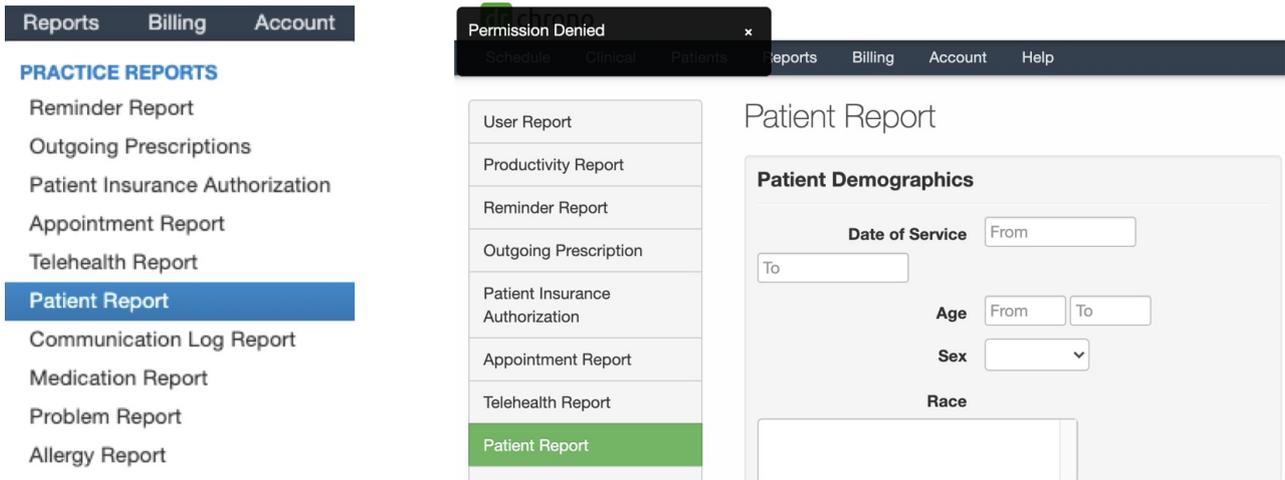
Access to **Patient Payments** is denied when both **Access Billing** and **Access Patient Payments** are BOTH disabled. Users will receive a **Permission Denied** message or an error that states **Cash Create Modal Component is Broken** (see below).

Access Billing ⓘ	<input type="checkbox"/>
Access Patient Payments ⓘ	<input type="checkbox"/>



Access Patient Analytics

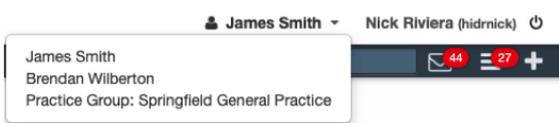
When Enabled	When Disabled
Allows the user to access the Patient Report under the Reports menu.	Access to the Patient Report under the Reports menu is restricted and a permission denied message is displayed.



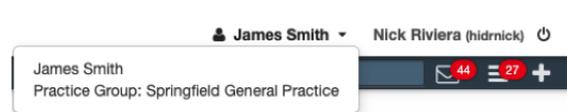
Provider Dropdown

When Enabled	When Disabled
Allows the user access to multiple providers in a practice group. The user can easily navigate between provider accounts with this permission enabled.	If this permission is disabled, the user will ONLY be able to access information for the Primary Provider listed on their staff account settings.

With Provider Dropdown Permission Enabled



Without Provider Dropdown Permission Enabled



Edit Office Staff

First name

Last name

Primary Provider

Email address

Username

Home phone

Cell phone

Send daily billing report?

iPad unlock code

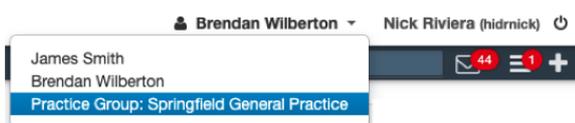
Restrict offices?

Use new dashboard?

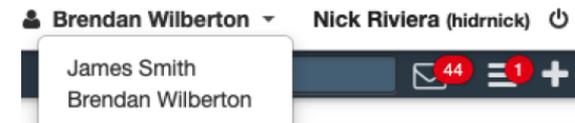
View Practice Group

When Enabled	When Disabled
The practice group dropdown allows you to view the collective information of the practice when the Practice Group option is selected. For more information on the practice group dropdown, see our article .	If this permission is disabled, you will only be able to see the information for the individual providers you have access to.

With View Practice Group Permission Enabled



Without View Practice Group Permission Enabled



Share Patients

When Enabled	When Disabled
Share patients allows users to view and interact with patients in the practice group whose primary provider is different from the primary provider selected on their staff account settings.	Users can only view and interact with patients whose provider is the same as the primary provider selected in their staff account settings.

Edit Office Staff

First name	<input type="text" value="Nick"/>
Last name	<input type="text" value="Riviera"/>
Primary Provider	<input type="text" value="James Smith"/>
Email address	<input type="text"/>
Username	<input type="text" value="hidrnick"/>
Home phone	<input type="text" value="() - -"/>
Cell phone	<input type="text" value="(555) 555-6425"/>
Send daily billing report?	<input type="checkbox"/>
iPad unlock code	<input type="text" value="7206"/>
Restrict offices?	<input type="checkbox"/>
Use new dashboard?	<input checked="" type="checkbox"/>

[Save staff account](#)

Access Reports

When Enabled	When Disabled
Allows users to access the Practice Reports under the Reports menu.	Restricts users from accessing the Practice Reports under the Reports menu. A permission denied message is displayed.

Reports Billing Account

PRACTICE REPORTS

- Reminder Report
- Outgoing Prescriptions
- Patient Insurance Authorization
- Appointment Report
- Telehealth Report
- Patient Report
- Communication Log Report
- Medication Report
- Problem Report
- Allergy Report
- Labs Report
- Advanced Report

Settings

When Enabled	When Disabled
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<p>Allows access to the Provider Settings and Offices under Practice Settings under the Account menu in addition to Patient Flags under the Patients menu.</p> <p>Note: eRx Settings is controlled by the Access to eRx permission.</p>	<p>Does not allow users to access Provider Settings and Offices under Practice Settings under the Account menu. Restricts access to Patient Flags under the Patients menu.</p>
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Export Patients

When Enabled	When Disabled
<p>Allows the user to export patient data in bulk in a CSV or bulk export C-CDA files under Patients > Patients List.</p>	<p>The user will not have access to the Export (CSV) or the Export (C-CDA XML) buttons under Patients > Patients List.</p>

Patients Reports

PATIENT

Patient List

Consent Forms

Patient Flags

Patient Groups

Send Email

Send Referral

With Export Permission Enabled

Manage your existing patients ?

Bulk Import QRDA I Import **Export (CSV)** **Export (C-CDA XML)**

Patient search... Search More Filters

+ Add new patient Update patient (via C-CDA XML) PAGE 1 OF 6

Without Export Permission Enabled

Manage your existing patients ?

Bulk Import QRDA I Import

Patient search... Search More Filters

+ Add new patient Update patient (via C-CDA XML) PAGE 1 OF 6

Manage Permissions

When Enabled	When Disabled
<p>Allows the user to add or remove permissions to staff or provider accounts under Account > Staff Permissions.</p>	<p>The user will not have access to Account > Staff Permissions and will receive a permission denied message.</p>

ACCOUNT SETTINGS

- User Settings
- Provider Settings
- onpatient Settings
- Account Setup
- Custom Fields
- Copy Dashboard (Beta)
- API
- App Directory

PRACTICE SETTINGS

- Offices
- Facilities
- Staff Members

Staff Permissions

Manage Templates

When Enabled	When Disabled
Allows the user to access the Form Tools to create and edit clinical forms under the Clinical menu.	The user will not have access to any of the Form Tools and will receive a permission denied message.

FORM TOOLS

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons

Manage Accounts

When Enabled	When Disabled
Allows the user access to Account > Staff Members: giving the user the ability to create, edit, and inactivate accounts for staff members.	The user will not have access to Accounts > Staff Members and will receive a permission denied message.

PROVIDER SETTINGS

- Account Settings
- onpatient Settings
- Telehealth Settings
- Account Setup
- Custom Fields
- Copy Dashboard (Beta)
- API
- App Directory

PRACTICE SETTINGS

- Offices
- Facilities
- Staff Members**
- Staff Permissions
- eRx Settings

Show Patient Balance

When Enabled	When Disabled
Displays the patient's balance in the appointment window and provides access to the Balance tab in the patient's chart.	The patient's balance in the appointment window and the Balance tab in the patient's chart will not be visible.

With Show Patient Balance Enabled

Screenshot of the 'Schedule Appointment' window with 'Show Patient Balance Enabled'. The 'Patient Statement Balance: \$1503.00' is visible at the top. A red arrow points to this balance. At the bottom, a 'Balance' tab is highlighted in the patient's chart navigation bar, with a blue arrow pointing to it.

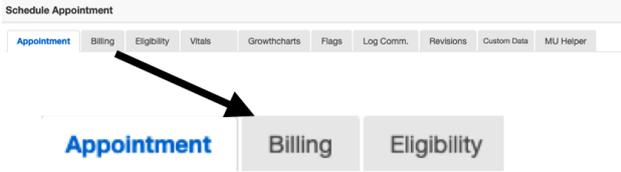
Without Show Patient Balance Enabled

Screenshot of the 'Schedule Appointment' window with 'Show Patient Balance Disabled'. The balance information is not visible. The 'Balance' tab is not present in the patient's chart navigation bar.

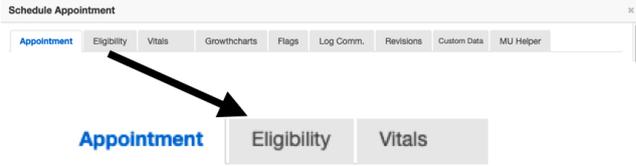
Show Billing Tab

When Enabled	When Disabled
Allows the user to access the Billing tab in the Appointment window and Clinical Note.	The user will not see the Billing tab in the Appointment window or Clinical Note.

With Show Billing Tab Enabled In the Appointment Window



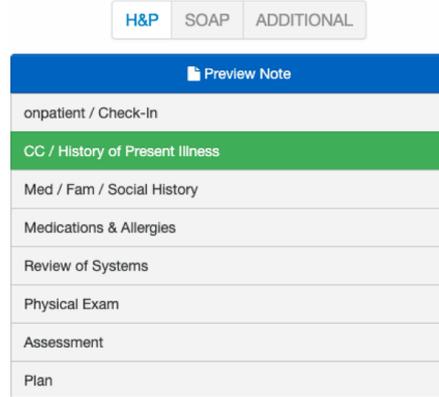
Without Show Billing Tab Enabled In the Appointment Window



With Show Billing Tab Enabled In the Clinical Note



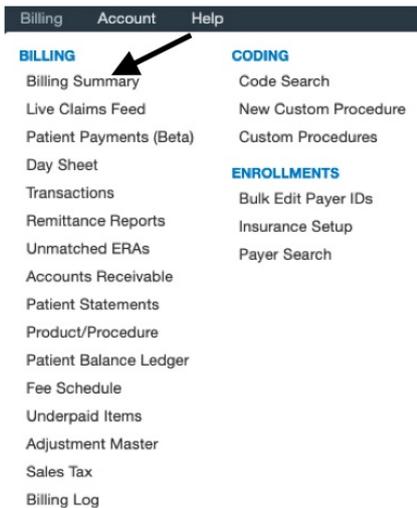
Without Show Billing Tab Enabled In the Clinical Note



Show Billing Summary

When Enabled	When Disabled
Allows the user to access the Billing Summary report in the Billing menu.	The user will not see the Billing Summary report in the Billing menu.

With Show Billing Summary Permission Enabled



Without Show Billing Summary Permission Enabled



Add new referring sources

When Enabled	When Disabled
Allows the user to add referring/ordering provider information to a patient's chart.	N/A

Referring Doctor

Referring Doctor Search	<input type="text"/>	Will populate fields below
Referring Dr. First Name	<input type="text" value="Edward"/>	
Referring Dr. Middle Name	<input type="text"/>	
Referring Dr. Last Name	<input type="text" value="Jenner"/>	
Referring Dr. Suffix	<input type="text"/>	
Referring Dr. NPI Number	<input type="text" value="9876543210"/>	
Referring Dr. Qualifier	<input type="text" value="-- Qualifier --"/>	
Referring Dr. Number	<input type="text"/>	
Referring Dr. Specialty	<input type="text" value="Primary Care Physician"/>	
Referring Dr. Address	<input type="text" value="328 Gibraltar Dr.
Sunnyvale, CA 94089"/>	
Referring Dr. Email	<input type="text"/>	
Referring Dr. Phone	<input type="text" value="(844) 569-8628"/>	
Referring Dr. Fax	<input type="text" value="XXX-XXX-XXXX"/>	
Referring Source	<input type="text"/>	
Primary Care Physician	<input type="text"/>	
Referral Number	<input type="text"/>	

Access Institutional Billing

When Enabled	When Disabled
<p>If your account has Institutional Billing enabled, this permission allows you to enter information for institutional UB04 forms.</p>	<p>The user is unable to enter information for UB04 forms. They will still see the switch for Institutional Claims on the Billing Details screen. However, if they try to activate the Institutional Claim switch, they will receive an Access Denied message.</p>

With Access Institutional Billing Permission Enabled

Jenny (Jen) Harris - 04/15/2021
Telehealth [02] - Exam 1

View Service + EOB SuperBill Clinical Note UB04 UB04 (ext) Print Screen

Institutional Claim Yes

Billing Status
ICD Version ICD-10
PI Payment \$ 0 Copay: \$20.00
Payment Profile Cash
PI Payment Due
Billing Profile Select Profile
Billing Pick List Choose from Pick List
Diagnosis Pick List Choose from PI Problems
Referral #
Purchased Serv Provider
Appointment Notes
Billing Notes

Info **Cond & Occ** **Value Code** **Insurance** **Attending**
Claim Type Default
Facility Type 1: Hospital UB04 box 4
Care Type 1: Including Medicare UB04 box 4
Billing Sequences 1: Admit Through Dis UB04 box 4
Stm Cover Period From To UB04 box 6
Adm Date & Hour Date Hrs UB04 box 12 - 13
Type of Admission 1: Emergency UB04 box 14
Point of Origin 9: Information N/A UB04 box 15
Discharge Hour UB04 box 16
PI Discharge St 01: Discharge to home or self UB04 box 17
Principal Dx Code UB04 box 97
Admitting Dx Code UB04 box 69
Reason for Visit DX A DX B DX C UB04 box 70
Enter Cause of Inj DX A DX B DX C UB04 box 72
Remarks UB04 box 80

Without Access Institutional Billing Permission Enabled

Jenny (Jen) Harris - 04/27/2021
Primary Office [11] - Exam 1

View Service + EOB SuperBill Clinical Note

Institutional Claim No



Access to drbrendan.drchrono.com was denied

You don't have authorization to view this page.

HTTP ERROR 403

[Reload](#)

Access All Messages for Practice Group

When Enabled	When Disabled

Allows users to view and interact with messages in the practice group whose primary provider is different from the primary provider selected on their staff account settings.

Users can only view and interact with messages whose provider is the same as the primary provider selected in their staff account settings.

With Access All Messages for Practice Group Permission Enabled

From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
Dr. Anderson	Generated PDF: HAU8200001.pdf					April 29, 2021, 1:13 p.m.	April 29, 2021, 1:13 p.m.
George Dicks, MD (201802218)	Insurance Fax					April 27, 2021, 9:10 p.m.	April 27, 2021, 9:10 p.m.
George Dicks, MD (201802218)	Insurance Fax					Dec. 1, 2020, 2:21 p.m.	April 27, 2021, 9:10 p.m.
Jenny Lind Harris	Medical question	Jenny Lind Harris	Brendan Wilkerson	Brendan Wilkerson		April 15, 2021, 9:25 a.m.	April 27, 2021, 9:10 p.m.
Homer J. Simpson	Online Appointment	Homer J. Simpson				April 14, 2021, 10:26 a.m.	April 27, 2021, 9:10 p.m.
Jenny Lind Harris	Medical question	Jenny Lind Harris	Brendan Wilkerson	Brendan Wilkerson		April 15, 2021, 9:25 a.m.	April 15, 2021, 9:25 a.m.
Jenny Lind Harris	Medical question	Jenny Lind Harris	Brendan Wilkerson	Brendan Wilkerson		April 15, 2021, 9:25 a.m.	April 15, 2021, 9:25 a.m.
Jenny Lind Harris	Medical question	Jenny Lind Harris	Brendan Wilkerson	Brendan Wilkerson		April 15, 2021, 9:25 a.m.	April 15, 2021, 9:25 a.m.
Homer J. Simpson	Online Appointment	Homer J. Simpson				April 14, 2021, 10:27 a.m.	April 15, 2021, 9:25 a.m.
Homer J. Simpson	Online Appointment Cancellation	Homer J. Simpson				April 14, 2021, 10:28 a.m.	April 15, 2021, 9:25 a.m.
Jenny Lind Harris	Online Appointment	Jenny Lind Harris				April 15, 2021, 11:28 a.m.	April 15, 2021, 11:28 a.m.
Jenny Lind Harris	Online Appointment Cancellation	Jenny Lind Harris				April 15, 2021, 11:29 a.m.	April 15, 2021, 11:29 a.m.
Jenny Lind Harris	Online Appointment	Jenny Lind Harris				April 15, 2021, 9:54 a.m.	April 15, 2021, 9:54 a.m.
Jenny Lind Harris	Medication question	Jenny Lind Harris	Brendan Wilkerson	Brendan Wilkerson		April 15, 2021, 9:51 a.m.	April 15, 2021, 9:51 a.m.

Without Access All Messages for Practice Group Permission Enabled

From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
Dr. Anderson	Generated PDF: HAU8200001.pdf					April 29, 2021, 1:13 p.m.	April 29, 2021, 1:13 p.m.
Jenny Lind Harris	Online Appointment	Jenny Lind Harris	Jenny Lind Harris			April 15, 2021, 9:23 a.m.	April 15, 2021, 9:23 a.m.
Jenny Lind Harris	Online Appointment	Jenny Lind Harris	Jenny Lind Harris			April 15, 2021, 11:29 a.m.	April 15, 2021, 11:29 a.m.
Homer J. Simpson	Online Appointment	Homer J. Simpson	Homer J. Simpson			April 14, 2021, 10:43 a.m.	April 14, 2021, 10:43 a.m.
Jenny Lind Harris	Online Appointment	Jenny Lind Harris	Jenny Lind Harris			Jan. 19, 2021, 10:37 a.m.	Jan. 19, 2021, 10:37 a.m.
Homer J. Simpson	Online Appointment	Homer J. Simpson	Homer J. Simpson	James Smith		Jan. 14, 2021, 9:23 p.m.	Jan. 14, 2021, 9:23 p.m.
Homer J. Simpson	Medication	Homer J. Simpson	James Smith	James Smith		Oct. 15, 2020, 12:54 p.m.	Oct. 26, 2020, 1:41 p.m.
Homer J. Simpson	Online Appointment Confirmed	Homer J. Simpson				Aug. 27, 2020, 10:44 a.m.	Sept. 10, 2020, 1:14 p.m.

Edit Office Staff

First name:

Last name:

Primary Provider:

Email address:

Username:

Home phone:

Cell phone:

Send daily billing report?

iPad unlock code:

Restrict offices?

Use new dashboard?

Billing Administrator

When Enabled

Allows the user to delete patient payments and unallocate line item payments in the Patient Payments section by selecting the lock icon (



). Additionally, the Billing Administrator permission allows the user to access Square setup and settings under Account > Account Settings > Patient Payments.

When Disabled

The user will not have the ability to delete payments or unallocate line item payments. The lock icon (



) will not appear on their screen when they are in the Patient Payments menu.

Users will be unable to complete any Square functions under Account > Account Settings > Patient Payments. They will receive an error message.

You cannot do Square operations in place of of this provider. You must be the owner of the account or the provider's staff member.

With Billing Administrator Permission Enabled

Without Billing Administrator Permission Enabled

Billing Account

- BILLING
- Live Claims Feed
- Patient Payments (Beta)**
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Accounts Receivable

- Billing Summary
- Live Claims Feed
- Patient Payments (beta)**
- Day Sheet
- Transactions
- Remittance Reports

Access Balance/Ledger

When Enabled	When Disabled
Allows the user to access the Patient Balance Ledger report under the Billing menu.	N/A

Billing Account Help

- BILLING**
 - Billing Summary
 - Live Claims Feed
 - Patient Payments (Beta)
 - Day Sheet
 - Transactions
 - Remittance Reports
 - Unmatched ERAs
 - Accounts Receivable
 - Patient Statements
 - Product/Procedure
 - Patient Balance Ledger**
 - Fee Schedule
 - Underpaid Items
 - Adjustment Master
 - Sales Tax
 - Billing Log
- BUSINESS INTELLIGENCE**
 - Denial Analysis 2.0
 - Payment Analysis 2.0
- CODING**
 - Code Search
 - New Custom Procedure
 - Custom Procedures
- ENROLLMENTS**
 - Bulk Edit Payer IDs
 - Insurance Setup
 - Payer Search

Access Patient Statements

When Enabled	When Disabled
Allows the user to access the Patient Statements section under the Billing menu.	N/A

BILLING

- Billing Summary
- Live Claims Feed
- Patient Payments (Beta)
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Accounts Receivable
- Patient Statements**
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

BUSINESS INTELLIGENCE

- Denial Analysis 2.0
- Payment Analysis 2.0

CODING

- Code Search
- New Custom Procedure
- Custom Procedures

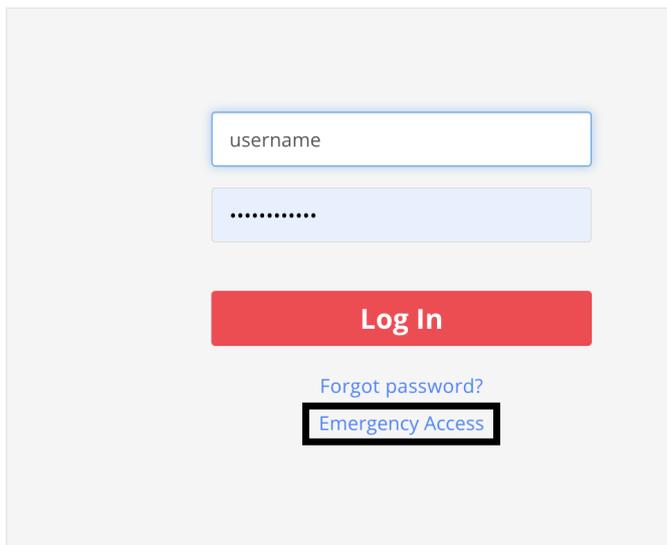
ENROLLMENTS

- Bulk Edit Payer IDs
- Insurance Setup
- Payer Search

Emergency Access

When Enabled	When Disabled
Allow the user to temporarily request emergency access to Create and Update Patients, Access Scheduling, and Access Clinical Notes system permissions.	The user would not be able to request emergency access. Permission denied.

Log in to your EHR



Break the Glass Review

*Please note this permission is part of a larger feature enhancement that is not yet available to users. We will have more information in the future about how to use this permission and best practices once it's made available.

When Enabled	When Disabled
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Allows the user to review and approve Break the Glass Requests.	The user would not be able to view or approve Break the Glass Requests.
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"EHR Break the Glass" refers to a security feature implemented in Electronic Health Record (EHR) systems. This feature is designed to protect sensitive patient information by requiring additional authentication steps before access is granted to certain highly confidential or restricted parts of a patient's medical records. The term "break the glass" metaphorically represents an emergency situation, similar to breaking the glass to access a fire extinguisher in case of fire. In the context of EHR systems, it means that a user (usually a healthcare provider) must take extra, deliberate actions to access the information, acknowledging the sensitivity and agreeing to the terms of accessing such data.

SAML SSO Admin Dashboard

When Enabled	When Disabled
Allows the user to view the SAML SSO Dashboard to review and approve SSO Requests.	The user would not be able to view the SAML SSO Dashboard to review and approve SSO requests.

ePS Enrollment (Edit)

When Enabled	When Disabled
The user can access Billing > Enrollment to see, modify, submit, and/or delete EDI, ERA, and RTE, requests with ePS.	The user cannot access Billing > Enrollment to see, modify, submit, and/or delete EDI, ERA, and RTE requests with ePS.

ePS Enrollment (Read Only)

When Enabled	When Disabled
The user can access Billing > Enrollment to see EDI, ERA, and RTE requests with ePS and their current status, but cannot make any changes or updates.	The user cannot access Billing > Enrollment to see EDI, ERA, and RTE requests with ePS and their current statuses.