# **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 Administratio	n ?
Providers Staff Roles Permissions	Permission Grid
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	A access Cabaduling	Appointment Provider		Access to Message		
Patients	Access Scheduling	Selection	USEIPAUERK	Center		
Create and Update	Access Clinical Notes	Sign/Lock Clinical	Archived Signed	Drug Interactions		
Contacts	Access Children Notes	Notes	Consent Forms	Check		
Access to oDy	Access Dilling	Access Patient	Access Patient	Drovidor Drondown		
ACCESS LO EKX	Access billing	Payments	Analytics			
View Practice Group	ce Group Share Patients Access Reports Settings		Settings	Export Patients		
Manage Permissions	Manage Templates	Manage Accounts	Show Patient Balance	Show Billing Tab		
Show Pilling Summary	Add new referring	Access Institutional	Access All Messages	Pilling Administrator		
Show billing Sulfilliary	sources	Billing	for Practice Group	Dining Autoinisti atoi		
Access	Access Patient	Emorgoneu Accoss	ELII Export	Break the Glass		
Balance/Ledger	Statements	Emergency Access	Enrexport	Review		
SAML SSO Admin	oDS Enrollmont (Edit)	ePS Enrollment (Read	Managa Form Taga	Disable Send to All		
Dashboard	ers en onnent (Eur)	Only)	Manage FUTIT Tags	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.

Without create and update patients permission enabled

My EHR

# Permission Denied

You don't have permission to view this page.

# **Create and Update Patients**

When Enabled	When Disabled
Allows users to create patients and grant access to	
patient charts. Without this permission, users will not be	A user that does not have this permission will not see the
able to access ANY patient charts or add patients in the	add new patient, edit patient or send OnPatient invite
appointment window.	icons (
	+ 🖉 🖻
	) in the appointment window.
	While the <b>New Detiont</b> shock how is visible, if a user
	while the <b>New Patient</b> 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.

#### With create and update patients permission enabled

Schedule Appointment Schedule Appointment ment Billing Eligibility Vitals ent Billing Elig App Type 
Appointment 
Video Visit 
Break 
Walk-in 
Transition of Care 
New Patient 
Referral Type 
Appointment 
Video Visit 
Break Walk-in Transition of Care New Patient Referral ++/ Patient -+/ - + / Primary Of Reason Profile Profile: Time 12:40PM \$ Time 11:00AM 🗘 021 04/26/2021 minutes Allow overlag 30 min. tes Allow overlap Duratio Duration Notes: Notes: × HIPAA Data Use Agreement (default) × No Show Policy (default) × HIPAA Data Use Agreement ( × No Show Policy (default) Consent Forms: Consent Forms: Arrange a Follow-up Re w-up Re Save & Close Save Cancel Delete Save & Close Save Cancel

# 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 <b>Dashboard</b> 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 <b>Account &gt; Account Settings &gt;</b> <b>General</b> tab and make sure the <b>Use new dashboard</b> <b>home screen</b> is checked.

# **Appointment Provider Selection**

With Appointment Provider Selection permission enabled

When Enabled	When Disabled
Allows users to schedule for all providers in the practice	If this permission is disabled, the user will ONLY be able
group.	to schedule for the <b>Primary Provider</b> listed on their staff
	account settings.

#### 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 ARNING: This patient is pre-populated sample data. Patient Statement Balance: \$1503.00 Generate Statement Balance: \$1503.00 women aged 40-74 And the second s v + 🥖 Office: Primary Office Profile: Reason: Scheduled: 04/27/2021 Time 01:30PM Duration: 30 minutes Allow overlapping Exam: Exam 1 Color: Notes: Status 0h 2m 1 View All Ap Recurring Appointment A schere Arrange a Follow-up Reminder View Active Reminders: Delete Save & Close Save Cancel

#### Without Appointment Provider Selection permission enabled

	ointment							
Appointment	Billing Eligibi	lity Vitals	Growthch	narts Flags	Log Comm.	Revisions	Custom Data	MU Helper
Ту	pe 💿 Appointment	O Video Visit	UWalk-In	Transition of C	are 🗌 Referra			
ARNING: This	patient is pre-populate	d sample data.	Patient Statem	ent Balance: \$150	3.00 Generate Sta	tement Bala	nce: \$1503.00	
6 past appoint	ments CDS: Mammo	gram screening fo	r all women age	ed 40-74 🏴 Nee	ds Authorization:	Needs prior au	th for procedure of	in 1/31.
Patient	Jenny (Jen) Harris - 0	12/11/1980 + +	/	Office	r: Primary Of	fice	- + 🥖	
Reason:				Profile	E		~	
Scheduled:	04/27/2021 Tim	e 01:30PM :	•	Exam	: Exam 1		~	
Duration:	30 minutes	Allow overlapping		Colo	r:			
Notes:				Status	8:		~	
			- lê		0h 1m			
Consent	× HIPAA Data Use Ag	reement (default)			@ Vie	w Clinical Not	Ð	
Forms:	× No Show Policy (de	efault)			View A	I Appointmen	ts	
View Active R	eminders:		Delete	re & Close Save	Cancel			
	Edit Offic	e Staff						
	Edit Offic	e Staff irst name Nick		13				
	Edit Offic	e Staff irst name Nick ast name Rivie	ra	13				
	Edit Offic	e Staff irst name Nick ast name Rivie Provider Bret	ra ndan Wilberton					
	Edit Offic F L Primary Emai	e Staff irst name Nick ast name Rivie Provider Brei I address	ra ndan Wilberton					
	Edit Offic F Primary Email	e Staff irst name Nick ast name Rivie Provider Brev I address J Jsername hidm	ra Idan Wilberton					
	Edit Offic F L Primary Email	e Staff irst name Nick ast name Rivie Provider Bree I address J Jsername hidrm	ra ndan Wilberton ick	•				

end daily billing report? 
iPad unlock code 7206
Restrict offices?
Use new dashboard?

#### Use iPad EHR

When Enabled	When Disabled
Allows users to log in and use the EHR App for iPhone	Without this permission enabled, users will receive an
and iPad.	error message when attempting to log in to the app.

Log In
hidrnick
Log In
Forgot Password?
<b>Error</b> User does not have access to iPad.
ОК
Questions? Contact drchrono.com/help

# Access to Message Center

When Enabled	When Disabled
	If this permission is disabled for the user, they will not be
Grants the user access to the Message Center (	able to access the <b>Message Center</b> (
) along with faxing/messaging capabilities from the	) or complete any of the tasks mentioned in the <b>Enabled</b>
patient chart and clinical note, allowing them to:	description while in the message and/or the patient's
view messages	chart.
fax documents	
send referrals	

So	hedu	le	Cli	nical	F	Patien	ts Repo	orts Billing	g Accou	nt Help 🛊	×							Search			$\nabla^4$	<b>;</b> +
0	Ju		•	2020	~	0	+ Event	🗂 Today	${oldsymbol{\mathcal{C}}}$ Refresh	🔒 Print Appts			•	lul 19 2020 - Jul 25	₩		Daily	Exam Room	ms [	Doctor		Monthly
Su	Мо	Tu	We	Th	Fr	Sa		Sun 7/	'19 ×	Mon 7/20	×	Tue 7/21	×	Wed 7/22	х	Thu 7/23 🛛 🕷		Fri 7/24	х	Sa	t 7/25	×
28	29	30	1	2	3	4																
5	6	7	8	9	10	11																
12	13	14	15	16	17	18	9:00am							9:00 - 10:00 am Jenny (Jen) Harris: P	BW rimary	9:00 - 9:30 am B' Jenny (Jen) Harris: Primary	V 9:00	9:45 am nda Jones: Prim	BW ary	9:00 - 10:13 Evan Jam	5 am es: Primary C	BW Office

# **Create and Update Contacts**

When Enabled When Disabled
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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 <b>Contacts</b> section in the account and will receive a <b>Permission Denied</b> error message. The user is also unable to add contacts when sending a referral through the <b>Create New Contact</b> option. The window to enter contact information will not open for the user.
To: js Emai Create New Contact Phone Fax Direct Email Address	
Schedule Clinical Patients Reports Billing Account Help 🕏 🗙	Search 💦 12 = 33 🕂

ALL MESSAGES	o 12	Inc	omi	ng Messages ?							Fax numb	er: +1 (301) 850-20
* Starred		Ma	ark as	Read Mark as Unread	S	how Archived			NEXT	>	Search Messages	c
III All Messages	12										0	
FAX	0			From		Title	Associated patient	Assigned to	Assigned by	Workflow	Created	▼ Updated
➔ Incoming Fax	2		☆	drchrono		Generated PDF:					Dec. 7, 2020, 11:07	Dec. 7, 2020, 11:0
← Outgoing Fax						patient_statements_12_07_20.pdf					a.m.	a.m.
LAB RESULTS	•		☆	Sample Doctor, MD (3018502018)	₽	Incoming Fax					Dec. 1, 2020, 3:55 p.m.	Dec. 1, 2020, 3:55 p.m.
A Lab Results		_		Sample Doctor, MD	-						Dec. 1, 2020, 3:23	Dec. 1, 2020, 3:23
ERX	0		12	(3018502018)	θ.	Incoming Fax					p.m.	p.m.
ペ eRx Requests		_	~	Homer I Cimpson	_	Online Anneintment	Homer J.				Nov. 4, 2020, 12:59	Nov. 4, 2020, 12:5
REFERRALS	0		м	Homer J. Simpson	•	Online Appointment	Simpson				p.m.	p.m.
← Outbound Referrals			~	Homor I Simpson	-	Online Appointment	Homer J.				Nov. 4, 2020, 12:57	Nov. 4, 2020, 12:5
A Contacts			ы М	Homer J. Simpson	•	Online Appointment	Simpson				p.m.	p.m.
- Contaoto												

# Access Clinical Notes

When Enabled	When Disabled
Allows the user to access and view clinical notes in various areas of DrChrono.	Users will receive a <b>Permission Denied</b> message when trying to view clinical notes in:
	<ul> <li>The appointment window (both on the schedule and in the patient's chart)</li> <li>Clinical &gt; Clinical Notes</li> <li>Live Claims Feed</li> </ul>

Scheduled Time	Provider	Reason	Notes	Office	Exam Re	oom Appo	pintment Status	Billing St	atus # Rem	ninders	Profile A	Actions			
Tue Apr 27, 2021 1:30p.m.	Brendan Wilberton			Primary Office	Exam 1				0			Edit Appoin	tment C Ed	it Note	
Clinical Patier	nts Repo	orts	Je	enny (Jen) F mary Office [11	Harris – 04 ] – Exam 1	/27/2021	View Service	+ EOB	E SuperBill	ø* Clini	ical Note				
Form Builder				🛛 Billing	Status					7					
Form Builder				ICD	Version	CD-10	~								
Library				Pt P	ayment	<b>0</b>	Copay: \$20.00	+							
Archive				Paymen	t Profile	Cash	<b>v</b>								
Form Reorder				Pt Paym	ent Due										
Complete Note Fo	ormat		Sche	dule Appoir	ntment										
Maara Buttana			Ар	pointment	Billing	Eligibility	Vitals	Growthch	harts Fla	gs Lo	og Comm.	Revisions	Custom Data	MU Helper	
Macro Buttons															
Document Manag	lement			Туре	Appointn	nent OV	/ideo Visit	Walk-in	Transition	of Care	Refer	ral			
			WAR	NING: This pat	tient is pre-p	opulated sa	mple data. Pat	ient Statem	ent Balance:	\$350.00 <mark>G</mark>	ienerate St	atement Balar	nce: \$350.00	1 past appointme	ents
			Prim	ary Insurance:	UnitedHealt	hcare [8772	6]								
Clinical Notes				Provider	Brendan Will	perton	~								
Audit Log				Patient N	lichelle Harri	s - 10/14/19	99 🔸 🕇 🥖	•	(	Office:	Primary	Office	~ <b>+</b> ,		
CDS Rules				Reason:					F	Profile:			~		
Inventory Manage	ement							10	Elig	gibility			~		
Patient Education	Manageme	nt							F	Profile:					
			Sc	heduled: 0	3/31/2021	Time 12	2:20PM 🗘		1	Exam:	Exam 1		~		
				Duration: 3	0 minut	es 🗌 Allo	w overlapping			Color:					
				Notes:					S	Status:	01- 4		~		
								~~~~~			Un 1m	fam Oliaiaal Nat			
				Forms:								view Clinical No	(e		
											Viev	All Appointmer	nts		
			Re	curring Appoin ange a Follow	tment Asch	eduled appoir Ir	ntment cannot be co	onverted to a	recurring series	l.					
			🗌 Vie	w Active Remi	nders:		_								

# Sign/Lock Clinical Notes

When Enabled	When Disabled
Allows the user to sign and lock clinical notes. The <b>Sign &amp;</b> <b>Lock</b> button will appear when the note is previewed. 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.	The user will not have a <b>Sign &amp; Lock</b> button available to them when they preview a note.

With Sign/Lock Clinical Notes Permission Enabled

Without Sign/Lock Clinical Notes Permission Enabled

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

+Amendments Revisions View Fax Edit Sections Print sections

# **Archived Signed Consent Forms**

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

#### With Archive Signed Consent Forms Enabled

+ Add new patien	4		Laurie T	Sample (Fem	ale   32 years old	Dec. 8, 1990				SAJA000001
Demographics		25	Phone: Address:	(650) 555-5555 123 Fake St	Email: sa	mple@sample.o	:om	Leat	Date Added: Jan.	4, 2022 for 13, 2023
Appointments				Sunnyvale , CA 9408	9			Next	Scheduled Appt: Thu /	pr 20, 2023
Clinical Dashboard	0		CDS:	Sample CDS Group	Dolphin Problem	s Patient mus	t have docume	rnted allergies	Adult Immunization Sche	dule Age: 27-49
Documents		enpatient access enab	bok							
Eigbilty		Primary Provider: D	Dr. James S	Smith						
Tasks	0	New Referral Fax De	mographics	Print Demograph	tica		Apple Heat	th App Data	♥ Wtals + Schedule	New Appointment
Problem List	0	Uploaded Documents Loc	ked Clinical Not	signed Consent I	orms Outbound R	eferrals Lab R	eaults Amend	Imenta		
Medication List	0									
Send eRx		Signed Consent Form	В							
Allergy List	0	Consent Form	Date of App	continent Date of	Signature J	tations	For Develope	P Read to consider	Landau Connect From	
Doug Interactions	0	HEPAA Data Lise Agreement	May 16, 202	2 8:00 AM May 17	2022 8:22 AM	Fax Consett Form	Fax Signature	E Send to onpatien	Archive Consent Form	
		No Show Policy	May 10, 202	2 8:00 AM May 17	2022 8:22 AM	Fax Consent Form	Fax Signature	E Send to organism	t Archive Consent Form	
GUMS		Archived Signed Cons	ent Forms							
Intake Data										
Lab Ordare		Archived Consent Form	Date of A	ppointment I	Date of Eignature	Oate Arc	hived	Reason	Actions	

#### Without Archive Signed Consent Forms Enabled

	Laurie T	. Samp	SAJA000001						
	Phone: Address:	(650) 555 123 Fake Sunnyval	-5555 Email St e , CA 94089	sample@fak	e.com Las Nex	Date Adde t Scheduled App t Scheduled App	2 023 023		
	CDS:	Patient r	must have docume	nted allergies	Adult Immunia	ation Schedule A	ge: 27-49		
𝔅 onpatient access enabled	New B	eferral	Fax Demographic	s 🔒 Print	Demographics	Apple Healt	h App Data	Vitals	+ Schedule New Appointment
lpload images, scanned par	per docum	nents, or l	PDFs download	ed from othe	r electronic m	dical records.			
Uploaded Documents Loci	ed Clinical	Notes	Signed Consent F	forms Out	oound Referrals	Lab Results	Amendments	0	
igned Consent Forms									
Consent Form	Date	of Appoints	ment De	te of Signature	~	tions			
HIPAA Data Use Agreement	Jun 1	5, 2023 1:00	DPM Ju	n 15, 2023 7:51 /	M I	ax Consent Form	Fax Signature	2ª Send to	onpatient
No Show Policy	Jun 1	5, 2023 1:00	DPM Ju	n 15, 2023 7:51 J	M I	ax Consent Form	Fax Signature	27 Send to	onpatient

# **Drug Interactions Check**

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

Tasks	9	Drug	-Drug Interactions	and Drug-Allergy Intera	ctions		
Problem List	16	Risk	Severity	Drug 1	Drug 2	Interaction Summary	
Mediaation List	<b>m</b>	X	Patient Allergic Interaction	aspirin	Patient Allergy		
Send eRx		D	Major	aspirin	celecoxib	Aspirin may enhance the adverse/toxic effect of Nonsteroidal Anti-Inflammatory Agents (COX-2 Selective).	more
Allergy List	4	С	Moderate	oxymetazoline nasal	phentermine	Sympathomimetics may enhance the adverse/toxic effect of other Sympathomimetics.	more
Drug Interactions		C	Moderate	prochlorperazine	phentermine	Antipsychotic Agents may diminish the stimulatory effect of Amphetamines.	more
Drug Interactions		С	Moderate	LORazepam	prochlorperazine	CNS Depressants may enhance the adverse/toxic effect of other CNS Depressants.	more
CQMs		С	Moderate	prochlorperazine	cetirizine	Anticholinergic Agents may enhance the adverse/toxic effect of other Anticholinergic Agents.	more
Intake Data		С	Minor	phentermine	cetirizine	Amphetamines may diminish the sedative effect of Antihistamines.	more
Lab Orders		в	Minor	LORazepam	levonorgestrel	Progestins (Contraceptive) may decrease the serum concentration of Benzodiazepines (metabolized by glucuronidation).	more
Immunizations		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 <b>Send eRx</b> function in the patient's chart. Grants the ability to prescribe medications. Note: If <b>Send eRx</b> 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.	Access to the <b>Send eRx</b> and <b>eRx Settings</b> feature is restricted, and a <b>Permission Denied</b> message will be displayed.
This setting also provides access to the <b>eRx Settings</b> under the account menu.	

Account	Marketplace	
ACCOUNT SE	TTINGS	
User Setting	IS	
Provider Set	tings	
onpatient Se	ettings	
Account Set	up	
Custom Fiel	ds	
Copy Dashb	oard (Beta)	
API		
App Director	ry	
PRACTICE SE	TTINGS	
Offices		
Facilities		
Staff Membe	ers	
Staff Permis	sions	
eRx Settings	5	

# Access Billing

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

Billing Account	Help	chrono
BILLING Billing Summary	CODING Code Search	Something is broken: unknown error ×(403)Clinical Patients Re
Live Claims Feed	New Custom Procedure	
Patient Payments (Beta	a) Custom Procedures	Unable to retrieve response for the x
Day Sheet	ENROLLMENTS	request
Transactions	Bulk Edit Payer IDs	Live Claims Feed
Remittance Reports	Insurance Setup	[ close all ]
Unmatched ERAs	Payer Search	Patient Payments (beta)
Accounts Receivable		
Patient Statements		Day Sheet
Product/Procedure		
Patient Balance Ledge	r	Transactions
Fee Schedule		Descrittance Describe
Underpaid Items		Remittance Reports
Adjustment Master		I Inmatched EBAs
Sales Tax		
Billing Log		Accounts Receivable

# **Access Patient Payments**

When Enabled	When Disabled

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

edule Appointment								•••	DrChrono
							_	drbrendan.drchrono.com/billing/cre	eate_cash_popup/173679842/ 🗞
ppointment Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revisions	Custom Data	Cash Create Modal Component is	
] Institutional Claim					Patient Sup	erBill Clinical	Note Billing E	broken	
<ul> <li>Billing Status</li> </ul>			~	HCFA Box	10 - Is patient's	condition rela	ted to:		
ICD Version	ICD-10		~		Employment	No	~		
Patient Payment	\$ 1.00	+			Auto Accident	No	~		
t	Receipt -				Other Accident	No	~		
Pre Authorization Approval									
Referral #					Onset Date Type	Onset of Cu	rrent Symptom		
Payment Profile	Cash		~		Onset Date				
Billing Profile		+			Other Date Type	- Other Date	Туре -		
Billing Pick List	Choose Cod	es from Pick List			Other Date				
Diagnosis Pick List	Choose Cod	es from Pt Proble	ems						
Credit Card Payment	Process Cre	dit Card							
D-10 Codes	Fi	nd Diagnosis co	des 🔸	CPT	Codes		Find CPT P		
Code	Description			Code	Descr	iption			
D-9 Codes to Conve	et Ei	ad Diagnosis os	don	HCE	Codes		Eind HOBO		

# **Access Patient Analytics**

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

eports Billing Account	Permission Denied	×
RACTICE REPORTS	Schedule Clinical	Patients Billing Account
eminder Report	User Report	Patient Report
utgoing Prescriptions	Productivity Report	Datiant Damamanhias
atient Insurance Authorization	Reminder Report	Patient Demographics
elebealth Report	Outgoing Prescription	Date of Service From
atient Report	Patient Insurance	
mmunication Log Report	Authorization	Age
edication Report	Appointment Report	Sex
oblem Report	Telehealth Report	Race
ergy Report	Patient Report	

# Provider Dropdown

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

#### With Provider Dropdown Permission Enabled

#### Without Provider Dropdown Permission Enabled



	🛔 James Smith 👻	Nick Riviera (hidrnick) ひ
James Smith Practice Group: Sprir	ngfield General Practice	<mark>∠44) =27) +</mark>
Edit Office Staf	f	
First name	Nick	83
Last name	Riviera	
Primary Provider	James Smith	~
Email address		
Username	hidrnick	
Home phone	()	
Cell phone	(555) 555-6425	
Send daily billing report?		
iPad unlock code	7206	
Restrict offices?		
Use new dashboard?	2	
	B Save staff account	

# **View Practice Group**

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

#### 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	Users can only view and interact with patients whose
patients in the practice group whose primary provider is	provider is the same as the primary provider selected in
different from the primary provider selected on their	their staff account settings.
staff account settings.	

# Edit Office Staff

First name	Nick
Last name	Riviera
Primary Provider	James Smith 🗸
Email address	
Username	hidrnick
Home phone	()
Cell phone	(555) 555-6425
Send daily billing report?	
iPad unlock code	7206
Restrict offices?	
Use new dashboard?	
	Save staff account

# **Access Reports**

When Enabled	When Disabled
Allows users to access the <b>Practice Reports</b> under the	
Reports menu.	Restricts users from accessing the <b>Practice Reports</b>
	under the <b>Reports</b> 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
S	Settings

When Enabled	When Disabled

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

# **Export Patients**

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

Patients Reports				
PATIENT				
Patient List				
Consent Forms				
Patient Flags				
Patient Groups				
Send Email				
Send Referral				
With Export Permission Enabled			1	1
			4	4
Manage your existing patients ?	Bulk Import	QRDA I Import	Export (CSV)	Export (C-CDA XML)
Patient search Search				More Filters
+ Add new 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 (via C-CDA XML)	PAGE 1 OF 6 🔶

# Manage Permissions

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

# Account Marketplace 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 Disabled
The user will not have access to any of the <b>Form Tools</b> and will receive a permission denied message.

Clinical	Patients	Reports	Billing
FORM TO	OLS		
Form Bui	lder		

#### Form Builder Library Archive

Form Reorder Complete Note Format onpatient Forms Macro Buttons

### Manage Accounts

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

Account Help

₿

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
	The patient's balance in the appointment window and the
Displays the patient's balance in the appointment	Balance tab in the patient's chart will not be visible.
window and provides access to the <b>Balance</b> tab in the	
patient's chart.	

#### With Show Patient Balance Enabled



#### Without Show Patient Balance Enabled

Appointment	Billing	Eligibilit	/ Vitals	Growtho	harts Flags	Log Comm.	Revisions	Custom	Data	MU Help
Ту	pe 💿 Appointme	nt C	Video Visit	UWalk-in	Transition of Ca	are 🗌 Referral				
ARNING: This	patient is pre-pop	oulated	sample data	Agressive:	Meeds Authori	zation: Needs pric	r auth for proce	dure on 1/		
Provider	Brendan Wilbe	rton	~							
Patient	Jenny (Jen) Har	ris - 02/	11/1980+	+ 🥒 😁	Office	: Primary Of	fice	~	+ 🥖	
Reason:					Profile	· ·····		*		
Scheduled:	04/27/2021	Time	01:30PM	•	Exam	Exam 1		~		

✓ Sufficient patient demographics to bill insurance.
 ✓ Agressive 
 ✓ Needs Authorization: Needs prior auth for procedure on 1

#### **Show Billing Tab**

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

#### With Show Billing Tab Enabled In the Appointment Window



#### With Show Billing Tab Enabled In the Clinical Note

	H&P	SOAP	ADDITIONAL	APPS
		E F	Preview Note	
onpa	tient / Ch	eck-In		
Subje	ective			
Obje	ctive			
Asse	ssment			
Plan				
Medi	cations &	Allergies		
Billin	9			-

#### Without Show Billing Tab Enabled In the Clinical Note

	H&P	SOAP	ADDITIONAL	
		Previe	w Note	
onpatient / Cl	heck-In			
CC / History	of Presen	t Illness		
Med / Fam / S	Social His	tory		
Medications &	& Allergie	5		
Review of Sys	stems			
Physical Exar	n			
Assessment				
Plan				

# **Show Billing Summary**

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

#### With Show Billing Summary Permission Enabled Without Show Billing Summary Permission Enabled

Billing Account	Help
BILLING	CODING
Billing Summary	Code Search
Live Claims Feed	New Custom Procedure
Patient Payments (Bet	a) Custom Procedures
Day Sheet	ENROLLMENTS
Transactions	Bulk Edit Payer IDs
Remittance Reports	Insurance Setup
Unmatched ERAs	Payer Search
Accounts Receivable	
Patient Statements	
Product/Procedure	
Patient Balance Ledge	r
Fee Schedule	
Underpaid Items	
Adjustment Master	
Sales Tax	
Billing Log	

# Add new referring sources

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

### **Referring Doctor**

+	Will populate fields below
Edward	
Jenner	
9876543210	
Qualifier 🗸	)
Primary Care Physician	)
328 Gibraltar Dr.	
Sunnyvale, CA 94089	
	)
(844) 569-8628	)
XXX-XXX-XXXX	]
+	
	Edward  Edward  Jenner  9876543210  Qualifier   Primary Care Physician  Primary Care Physician  (844) 569-8628  XXX-XXX-XXXX

# **Access Institutional Billing**

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

#### 

# 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.

W	it	h Access /	41	Messages for	Practice G	iroup P	ermiss	sion	Enable	d		Wi	ith	10
Oliv	9	Account Help							Ø & James Smith Search	h - Nick Riviera p	amich) ()	Bill	ling	A
nco	mi	ng Messages 🛛 💈								Fax number: +1 (0)	0 808-2018	Inc	om	ina
Mar	% as	Read Mark as Unread Show	n Arc	hived					NEXT > Search	h Messages	Q,			
		Press		710.	ferminand entired	Assistant to	Reviewed by	Westfree	Constant	Withouted		M	ark a	as Ro
	0	drohrono		Generated PDF: HAJE000001.pdf		Printigeneo 10	Antipart by		April 29, 2021, 1:13 p.m.	April 29, 2021, 1:1	len.			
	2	Sample Doctor, MD (3018502018)		Incoming Fax					April 27, 2021, 5:15 p.m.	April 27, 2021, 5:1	Sp.m.			Fr
	Ŕ	Sample Doctor, MD (3018502018)	æ	Incoming Fax					Dec. 1, 2020, 3:23 p.m.	April 27, 2021, 5:01	p.m.		\$	dri
	ŵ	Jenny (Jen) Hanis		Medical question	Jenny (Jen) Harris	Brendan Wilberton	Brendan Wilberton		April 15, 2021, 9:25 a.m.	April 27, 2021, 5:01	p.m.		\$	30
	ģ	Homer J. Simpson		Online Appointment	Homer J. Simpson				April 14, 2021, 10:36 a.m.	April 27, 2021, 12.4	14 p.m.			
	ġ.	Jenny (Jen) Harris		Medical question	Jenny (Jen) Harris	Brendan Wilberton	Brendan Wilberton		April 15, 2021, 9:25 a.m.	April 15, 2021, 9:2	Sam.		ਸ	
	\$	Jenny (Jen) Harris		Medical question	Jenny (Jen) Harris	Brendan Wilberton	Brandan Wilberton		April 15, 2021, 9:25 a.m.	April 15, 2021, 8:2	Sam.		\$	Ho
	ġ.	Jenny (Jen) Harris		Medical guestion	Jenny (Jer) Harris	Brendan Wilberton	Brendan Wilberton		April 15, 2021, 9:25 a.m.	April 15, 2021, 9-2	Sam.		\$	30
	ġ.	Jenny (Jen) Harris		Online Appointment	Jenny (Jen) Harris				April 15, 2021, 9:23 a.m.	April 16, 2021, 9:2	Jam.		0	
	¢.	Homer J. Simpson	٠	Online Appointment	Homer J. Simpson				April 14, 2021, 10:07 a.m	April 14, 2021, 12	37 a.m.	-		
	ġ.	Homer J. Simpson		Online Appointment Cancellation	Homer J. Simpson				April 14, 2021, 19:06 a.m	April 14, 2021, 12	36 a.m.		8	Ho
	¢.	Jenny (Jen) Harris		Online Appointment	Jenny (Jer) Harris				April 13, 2021, 11:09 a.m	April 13, 2021, 11:	39 a.m.		Ŷ	Ho
	¢.	Jenny (Jen) Harris		Online Appointment Cancellation	Jenny (Jen) Harris				April 10, 2021, 11:24 a.m	April 13, 2021, 11:	24 a.m.		Ŷ	Ho
	2	Jenny (Jen) Harris		Online Appointment Cancellation	Jenny (Jer) Harris				April 13, 2021, 11:22 a.m	April 13, 2021, 11:	22 a.m.			
	÷	Jenny (Jen) Harris		Online Appointment	Jenny (Jen) Harris				April 13, 2021, 9:54 a.m.	April 10, 2021, 8:5	iam.			
	•	Jenny (Jen) Harris		Medication question	Jenny (Jer) Harris	Brendan Wilberton	Brendan Wilberton		April 13, 2021, 9:51 a.m.	April 13, 2021, 9:5	1am			

	ccount Help						S	earch
Icoming	Messages 4	Show Amblund						Count Messages
INSUES, BUILTING	au mark as 011080							Concernation and Concernation
- Fn	om	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	▼ Updated
]☆ dn	chrono	Generated PDF: HAJE000001.pdf					April 29, 2021, 1:13 p.m.	April 29, 2021, 1:
30	nny (Jes) Harris	Online Appointment	Jenny (Jen) Harris				April 15, 2021, 9:23 a.m.	April 15, 2021, 9:
) Ω Je	nny (Jen) Harris	Online Appointment	Jenny (Jen) Harris				April 13, 2021, 11:39 a.m.	April 13, 2021, 11
jΩ He	emer J. Simpson	Online Appointment	Homer J. Simpson				April 5, 2021, 2:45 p.m.	April 5, 2021, 254
1 12 30	nny (Jen) nams	Contract Appointment	Jenny (Jen) Hams				Jan. 19, 2021, 10:40 a.m.	386. 19, 2021, 10
17 30	nny (Jen) nams	Online Appointment	Jenny (Jen) Hama				Jun. 19, 2021, 10:37 a.m.	Jan. 19, 2021, 10
) <u>1</u> 190	ener J. Simpson	Online Appointment	Homer J. Simpson	James Coult	Income Parish		out. 14, 2021, 2023 p.m.	Get 05 2021, 20
1 10 100	mer J. Ompson	Online transitioners Operations of	Homer J. Ompson	James James	James James		001. 10, 2020, 12:04 p.m.	011.20,2020,1
		Primary Provide	r James Smith	~				
		Email address	3					
		Username	hidmick					
		Home phone	ə [()					
		Cell phone	(555) 555-6425					
		Send daily billing report						
		Send daily billing report	7206					
		Send daily billing report iPad unlock code Restrict offices	7 D 77206					
		Send daily billing report iPad unlock code Restrict offices Use new dashboard	7 06 7206 7207 7207					

# **Billing Administrator**

When Enabled	When Disabled
Allows the user to delete patient payments and unallocate line item payments in the <b>Patient Payments</b> section by selecting the lock icon ( ).	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.
Additionally, the Billing Administrator permission allows the user to access Square setup and settings under <b>Account &gt; Account Settings &gt; Patient Payments</b> .	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.

Patient Payments	Payments	Line Items	Logs State	ements E	Balance			
Jenny (Jen) Harris	Filter b	y Range: \$	-	\$	Pro	vider: All -		
Simple: On Co	ndensed: On							
				Total Paid		Allocated Paymen	nt (Paid to Appt)	Unallocated Payment
nny (Jen) Harris				\$81.00		\$81.0	00	\$0.00
Dilling As								
Billing Act	count							
Billing Aca BILLING	count		Billing	g Summary	ý			
Billing Act BILLING Live Claims F	count <sup>-</sup> eed		Billing Live C	9 Summary Claims Fee	y ed			
Billing Ac BILLING Live Claims F Patient Paym	count <sup>-</sup> eed nents (Bet	a	Billing Live C	) Summary Claims Fee nt Paymen	y ed its (beta)			
Billing Ac BILLING Live Claims F Patient Paym Day Sheet	count Feed lients (Bet	a	Billing Live C Patier	g Summary Claims Fee nt Paymen	y od its (beta)			
Billing Act BILLING Live Claims F Patient Paym Day Sheet Transactions	count Feed tents (Bet	a	Billing Live C Patien Day S	g Summary Claims Fee ht Paymen Sheet	y ed its (beta)			
Billing Ac BILLING Live Claims F Patient Paym Day Sheet Transactions Remittance F	count Feed Teents (Bet	a	Billing Live C Patier Day S Trans	g Summary Claims Fee ht Payment Sheet actions	y xd ts (beta)			

#### Without Billing Administrator Permission Enabled

Patient Pa	yments	Payments	Line Items	Logs	Statements	Balance	
Test Cam	+						
From	То	Filter	by Range: \$		- \$	Prov	ider: All
Simple: On	Condense	ed: On					
					Total Paid	d	Allocate
Test Cam					\$1.00		

# Access Balance/Ledger

Unmatched ERAs Accounts Receivable

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

Billing	Account	Help	
BILLING			BUSINESS INTELLIGENCE
Billing S	ummary		Denial Analysis 2.0
Live Cla	ims Feed		Payment Analysis 2.0
Patient	Payments (Beta	a)	CODING
Day She	et		Code Search
Transac	tions		New Custom Procedure
Remitta	nce Reports		Custom Procedures
Unmatc Account Patient S Product	hed ERAs ts Receivable Statements /Procedure		ENROLLMENTS Bulk Edit Payer IDs Insurance Setup
Patient	Balance Ledge	r	Payer Search
Fee Sch	edule		
Underpa	aid Items		
Adjustm	ent Master		
Sales Ta	X		
Billing L	og		

# **Access Patient Statements**

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

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

# **BUSINESS INTELLIGENCE** Denial Analysis 2.0

New Custom Procedure **Custom Procedures** 

# **Emergency Access**

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

# 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

	The user would not be able to view or approve Break the
Allows the user to review and approve Break the Glass	Glass Requests.
Requests.	

"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
	The user would not be able to view the SAML SSO
Allows the user to view the SAML SSO Dashboard to	Dashboard to review and approve SSO requests.
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	The user cannot access Billing > Enrollment to see,
ePS.	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,	The user cannot access Billing > Enrollment to see EDI,
and RTE requests with ePS and their current status, but	ERA, and RTE requests with ePS and their current
cannot make any changes or updates.	statuses.