Adding a New Role

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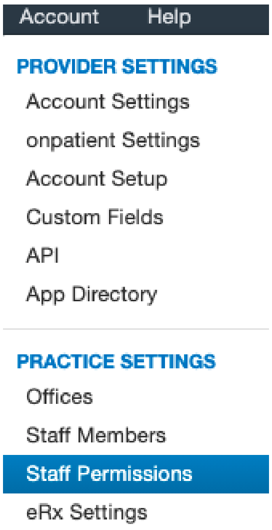
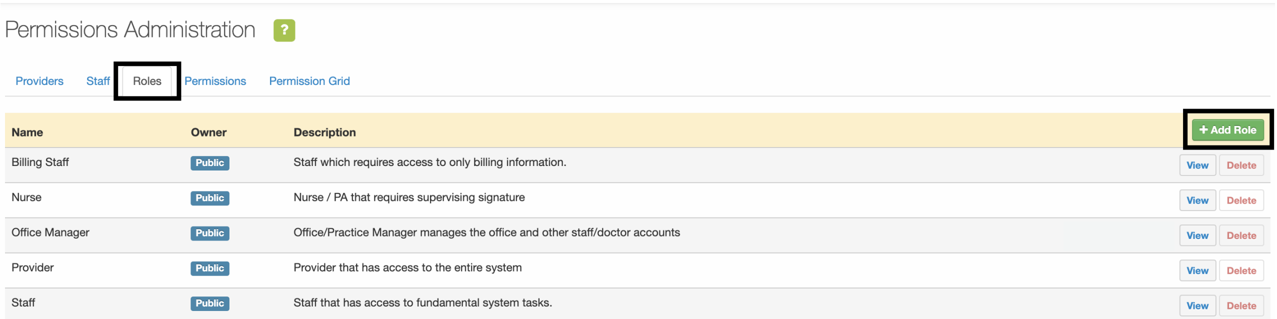
Within your practice, different staff members can have different levels of permission. With staff roles, you can easily customize which staff members have access to different permissions within the EHR. This guide will teach you how to change your staff roles and add new roles.

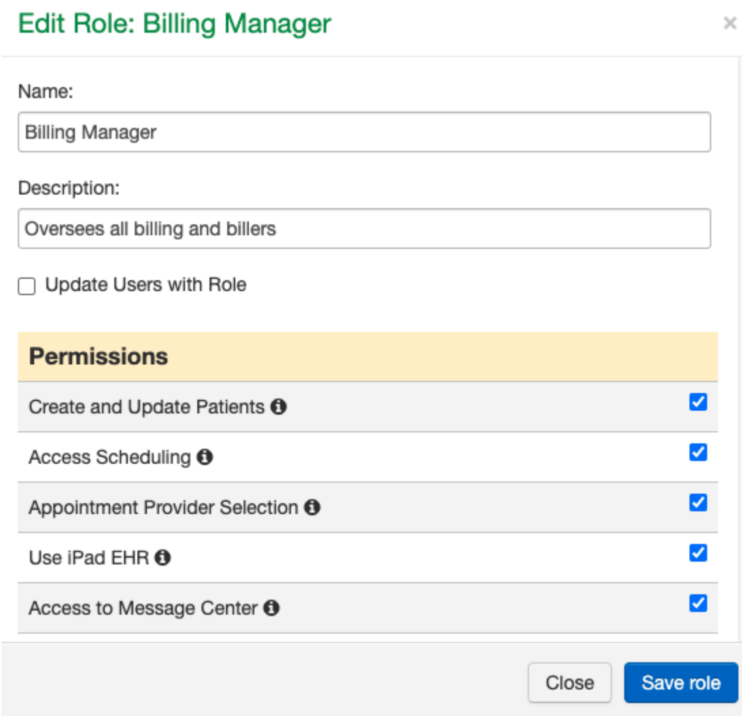
To begin, go to **Account** and select **Staff Permissions**.



To add a new role, select the **Roles** tab. Here you can view a list of active roles that can be applied to your staff members. Select the **+Add Role** button.



Enter the name and description of your new role. Select the permissions for your new role. When complete, select the **Save Role** button.



Your new role will appear at the bottom of the Roles list. Notice that instead of the 'View' button on public roles, your new role will have an **Edit** option. Public roles cannot be edited but you can adjust the individual user's permissions.

To edit your new custom role, select the **Edit** button and you'll be able to edit the permissions of the role once again by selecting and unselecting the checkboxes.