How do I edit user/staff account permissions?

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DrChrono allows you to customize what users are able to access. You can restrict/allow access to certain aspects of the software through the staff permissions function under **Account** > **Staff Permissions**.

First, go to Account > Staff Permissions.

Permissions Administration ?		
Providers Staff Roles Permissions Permission Grid		
Provider	Role	
Nick Riviera	Custom	View
Doctor Doctor	Custom	View

To edit permissions for any user, click **View** to the right of their name. If you need to edit staff permissions, be sure the **Staff** tab is selected.

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Once you have selected the user and clicked View, click Edit Permissions.

Permissions for Doctor Doctor

Role: Custom	
Permissions	
Create and Update Patients ()	
Access Scheduling 1	
Appointment Provider Selection 1	
Use iPad EHR ()	
Access to Message Center 1	
Create and Update Contacts 0	
Access Clinical Notes 1	
Sign/Lock Clinical Notes 0	
Drug Interactions Check ()	
Close	Permissions

After clicking **Edit Permissions**, check or uncheck the permissions you would like to add or remove. If you hover over "i" you can see a short description of what the permission allows access to. You can also find this information under the **Permissions** tab. Once you have completed the process, click **Save Permissions**.

Permissions for Doctor Doctor

Access Scheduling 1	
Appointment Provider Selection ()	
Use iPad EHR 1	
Access to Message Center ()	
Create and Update Contacts 0	
Access Clinical Notes 1	
Sign/Lock Clinical Notes 1	
Drug Interactions Check ()	
Access to eRx ()	
Access Billing 1	
Access Patient Payments ()	
Access Patient Analytics 1	
Close	Save Permissions

Permissions can also be assigned based on **Roles**. **Roles** are preassigned permissions based on the day-to-day functions of a staff member.

Click on the **Roles** tab. Click **View** to see the permissions associated with a role. If you would like to create your own set of permissions for a role, click **+ Add Role**. This will allow you to assign custom roles to users in your account.

Permissions Admi	nistration	2		
Providers Staff Roles	Permissions P	Permission Grid		
Name	Owner	Description	+ 4	dd Role
Billing Staff	Public	Staff which requires access to only billing information.	View	Delete
Nurse	Public	Nurse / PA that requires supervising signature	View	Delete
Office Manager	Public	Office/Practice Manager manages the office and other staff/doctor accounts	View	Delete
Provider	Public	Provider that has access to the entire system	View	Delete
Staff	Public	Staff that has access to fundamental system tasks.	View	Delete

You can always edit a user's permissions using the first steps in this article. Once a user's role is changed, their role will be '**custom'**.

The **Permission Grid** tab gives you a quick overview of the permissions users have or do not have. You can then follow the steps at the beginning to add or remove permissions.

Perm	Permissions Administration 🕐																									
Provide	Providers Staff Roles Permission Grid																									
	Create and Update Patients	Access Scheduling	Appointment Provider Selection	iPad	Access to Message Center	Create and Update Contacts	Access Clinical Notes	Sign/Lock Clinical Notes	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
Doctor Doctor	*	*	~	~	*	*	*	*	~	~	*	*	*	*	~	~	*	*	*	*	*	*	*	*	×	*
Nick Riviera	*	*	*	*	*	*	*	*	*	*	*	*	*	*	× .	*	*	*	*	×	×	×	*	*	*	×
Nick Riviera	*	*	~	*	*	× .	*	*	*	*	*	*	*	× .	× .	× .	*	*	× .	*	*	*	1	*	*	*

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