Account Permissions Overview

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A | B | C | D | E | M | P | S | U | V

DrChrono has permissions that can grant or restrict access to different areas of the system. Permissions and their descriptions are listed on the **Permissions Administration** page (**Account > Staff Permissions > Permissions** tab).

When the permission is turned off, you often receive a "permission denied" message when trying to access a page or feature for which you don't have the permission.

Access All Messages for Practice Group

Turned On	Turned Off
View and manage messages and tasks for all providers	• Providers can only view and manage their own
in the practice group.	and assigned messages and tasks.
	Staff can only view and manage messages for
	their associated primary provider selected on
	the Edit Office Staff page (Account > Staff
	Members > Staff tab > select Edit > Primary
	Provider dropdown).

The practice group (PG) level setting (Share Communications > Share among all providers in the PG) must be turned on for the Access All Messages for Practice Group user permission to allow message sharing.



- If the PG setting is turned off (Share Communications > Do not share communication data), message sharing is turned off for the practice group regardless of the user's permission.
- If the PG setting is turned on (Share Communications > Share among all providers in the PG), the user setting dictates whether that user can see messages for the entire practice or just for themselves (plus their primary provider in the case of a staff user).
 - The staff member's unread message count is tied to their primary provider's access.
 - If the primary provider has access to all messages, and the staff member doesn't, the staff member still sees the primary provider's message count.

Scenarios

User	Share Among All Providers in the PG (PG Setting)	Access All Messages for Practice Group (User Permission)	Message Visibility and Count
Provider	On	On	All messages and tasks in Message Center

User	Share Among All Providers in the PG (PG Setting)	Access All Messages for Practice Group (User Permission)	Message Visibility and Count
Staff	On	On	All messages and tasks in Message Center
Provider	On	Off	Own + assigned messages and tasks
Staff	On	Off	Own + assigned + primary provider's messages and tasks
Provider	On	On	All messages and tasks
Staff	On	Off	All messages and tasks
Provider	On	Off	Own + assigned messages and tasks
Staff	On	On	All messages and tasks
Provider	Off	On	Own + assigned messages and tasks
Staff	Off	On	Own + assigned + primary provider's messages and tasks
Provider	Off	Off	Own + assigned messages and tasks
Staff	Off	Off	Own + assigned + primary provider's messages and tasks

Access Balance/Ledger

Turned On	Turned Off
Access Billing > Patient Balance Ledger.	No access to Billing > Patient Balance Ledger.

Access Billing

Turned On	Turned Off
Access the Billing menu.	 No access to the Billing menu. You can still enter codes in appointments and clinical notes on the Billing tab.

Access Clinical Notes

Turned On	Turned Off
Access and view clinical notes in various areas of	Receive a "permission denied" message when trying to
DrChrono.	view clinical notes in:
	• The appointment (both on the schedule and in
	the patient chart)
	Clinical > Clinical Notes
	Live Claims Feed

Access Institutional Billing

Turned On	Turned Off
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Turned On	Turned Off
Enter information for institutional UB04 forms.	Can't enter information for institutional UB04 forms. You see the Institutional Claim toggle switch on the Billing Details screen; however, if you try to turn the
	message.

Access Patient Analytics

Turned On	Turned Off
Access to Reports > Patient Report.	No access to Reports > Patient Report .

Access Patient Payments

Turned On	Turned Off
Enter and process payments in the appointment,	Access to Patient Payments is denied when Access
patient's chart/patient payments, the Live Claims	Billing and Access Patient Payments permissions are
Feed, and the DrChrono EHR app.	turned off. You receive the "permission
	denied" message or the "Cash create modal
	component is broken" error.

Access Patient Statements

Turned on	Turned Off
Access Billing > Patient Statements.	No access to Billing > Patient Statements.

Access RecordSync

Turned On	Turned Off
Access to the RecordSync feature.	No access to the RecordSync feature.

Access Reports

Turned On	Turned oOf
Access Reports > Practice Reports.	No access to Reports > Practice Reports .

Access Scheduling

Turned On	Turned Off
Access the schedule as well as view and schedule	Can't see or access any of the patient's appointments.
appointments.	Note: Staff accounts must land on the Dashboard
	when they log in; otherwise, they won't be able to
	access DrChrono after logging in because they cannot
	access the schedule.
	To set this up, go to Account > Account Settings >
	General tab and select the Use new dashboard home
	screen checkbox.

Access to eRx

Turned On	Turned Off
 Access to the Send eRx function in the patient's chart. You can prescribe medications. 	No access to the Send eRx and eRx Settings features.
 If Send eRx is turned on for a staff user, they can send prescriptions; however, only the provider's name appears on the prescription, not the user's. Access to Account > eRxSettings. 	

Access to Message Center

Turned On	Turned Off
Access the Message Center along with faxing/messaging capabilities from the patient chart and clinical note, allowing you to: • View messages	Can't access the Message Center or perform any tasks in the Turned on description while in the message and/or the patient chart.
Fax documentsSend referrals	

Add New Referring Sources

Turned On	Turned Off
Add referring/ordering provider information to a	Can't add referring/ordering provider information to a
patient chart.	patient chart.

Appointment Provider Selection

Turned On	Turned Off
Staff can schedule appointments for all providers in	Staff can only schedule appointments for their
the practice group.	associated primary provider selected on the Edit
	Office Staff page (Account > Staff Members > Staff tab
	> select Edit > Primary Provider dropdown).

Archive Signed Consent Forms

Turned On	Turned Off
Archive signed consent forms.	Can't archive signed consent forms.
In a patient chart > Documents section > Signed	
Consent Forms tab, the Archive Consent Form button	
appears.	

Related article

Archiving Signed Consent Forms

Billing Administrator

Turned On

Turned On	Turned Off
Delete patient payments and unallocate line item	Can't delete payments or unallocate line item
payments in the Patient Payments section by	payments. The lock icon 🕒 doesn't appear on
selecting the lock icon 🔒 .	the Patient Payments tab.
 Access Square setup and settings in Account > 	 Can't access Square setup and settings.
Account Settings > Patient Payments tab.	

Related articles

- Deleting a payment in the Patient Payments system
- How Do I Unallocate a Payment if it is Posted to a Wrong Appointment?

Break the Glass Review

This permission is part of a significant feature enhancement not yet available to users. We will have more information about how to use this permission and the best practices when it is released.

Turned On	Turned Off
Review and approve break-the-glass requests	Can't view or approve break-the-glass requests

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, similar to breaking the glass to access a fire extinguisher in case of fire. In the context of EHR systems, 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.

Bulk Patient EHI Export

Turned On	Turned Off
Export data for all patients in the practice or for one	Can't export data for all patients in the practice or for
patient.	one patient.

Related article

Creating a New Request: EHI Export

Configure Decision Support Intervention

Turned On	Turned Off
View, create, edit, or deactivate decision support	Can't view, create, edit, or deactivate DSI rules.
intervention (DSI) rules.	

Create and Update Contacts

Turned On	Turned Off

Turned On	Turned Off
Add contacts to the account in the Message Center >	• No access to the Contacts section in Message
Contacts > Create New Contact option when sending	Center.
a referral.	Can't add contacts when sending a referral using
	the Create New Contact option. The window to
	enter contact information doesn't open.

Create and Update Patients

Turned On	Turned Off
Create patients and grant access to patient charts.	 Can't access patient charts or add patients to appointments. Can't see the Add a New Patient, Edit Patient, or Invite to OnPatient icons Invite to OnPatient icons Invite Schedule Appointment window. The New Patient checkbox appears, but if you try to add a patient, you receive an error message. If you try to select a patient's name in the Message Center, you receive a "permission denied" message. Can't attach documents to a patient chart.

Disable Send to All Patients Option

Turned On	Turned Off
The option to send to all patients on the Email your	The option to send to all patients on the Email your
<pre>patients page (Patients > Send Email) is turned off.</pre>	<pre>patients page (Patients > Send Email) is turned on.</pre>

Drug Interactions Check

Turned On	Turned Off
Access the Drug Interactions section in the patient	No access to the Drug Interactions section in the
chart or clinical note.	patient chart or clinical note.

Emergency Access

Turned On	Turned Off
Select Emergency Access on the login page to	Can't request emergency access.
temporarily request the Create and Update Patients,	
Access Scheduling, and Access Clinical Notes system	
permissions.	

ePS Enrollment (Edit)

Turned On	Turned Off
Access Billing > Enrollment to see, modify, submit, or	No access to Billing > Enrollment .
delete EDI, ERA, and RTE requests with ePS.	

Turned Off

ePS Enrollment (Read Only)

Turned On	Turned Off
Access Billing > Enrollment to see EDI, ERA, and RTE	No access to Billing > Enrollment.
requests with ePS and their current status, but can't	
make any changes or updates.	

Export Patients

Turned On	Turned Off
Export patient data in bulk in a CSV or bulk export C-	No Export (CSV) or Export (C-CDA XML) buttons
CDA files from the Patient List page.	appear on the Patient List page.

Manage Accounts

Turned On	Turned Off
Access Account > Staff Members to create, edit, or	No access to Account > Staff Members.
deactivate accounts for staff members	

Manage App Directory

Turned On	Turned Off
Manage authorized apps in the App Directory.	Can't manage authorized apps in the App Directory .

Manage Permissions

Turned On	Turned Off
Access Account > Staff Permissions to add or remove	No access to Account > Staff Permissions.
permissions to staff or provider accounts.	

Manage Templates

Turned On	Turned Off
Access Clinical > Form Tools to create and edit clinical	No access to Clinical > Form Tools to create and edit
forms.	clinical forms.

MIPS Decision Support Intervention

Turned On	Turned Off
Manage MIPS decision support intervention.	Can't manage MIPS decision support intervention.

Practice Patient Chart Header Settings

Turned On	Turned Off
Customize the patient chart header settings for the	Can't customize the patient chart header settings for
practice at the administrative level.	the practice at the administrative level.

Practice Patient Chart Sidebar Nav Settings

Turned On	Turned Off
Customize the patient chart sidebar settings for the	Can't customize the patient chart sidebar settings for
practice at the administrative level.	the practice at the administrative level.

Provider Dropdown

Turned On		Turned Off
Can access multiple providers in	a practice group.	Can only access information for their associated primary provider selected on the Edit Office Staff
Hannah Provider	Leah Sample (Isample) ひ	page (Account > Staff Members > Staff tab > select Edit > Primary Provider dropdown).
Michael Provider Rayla Provider Practice Group: Blue Medical Group	<u>u</u> 🗆 = t	
		Hannah Provider Practice Group: Blue Medical Group

SAML SSO Admin Dashboard

Turned On	Turned Off
View the SAML SSO Dashboard to review and	Can't view the SAML SSO Dashboard.
approve SSO requests.	

Settings

Turned On	Turned Off
View and edit multiple setting profiles as well as APIs.	Can't view and edit multiple setting profiles or APIs.

Account Settings

Turned on + Settings Turned On	Turned Off
Access the Account Settings page.	No access to the Account Settings page.
Required: Settings permissions turned on.	

Custom Field Settings

Turned on + Settings Turned On	Turned Off
Access the Custom Manage Data page.	No access to the Custom Manage Data page.
Required: Settings permissions turned on.	

Office Settings

Turned on + Settings Turned On	Turned Off
Access the Manage offices page.	No access to the Manage offices page.
Required: Settings permissions turned on.	

OnPatient Settings

Turned on + Settings Turned On	Turned Off
Access the onpatient Settings page.	No access to the onpatient Settings page.
Required: Settings permissions turned on.	

Share Patients

If your practice has more than one provider, you can turn on the **Share Patients** permission so that patients can be seen by different providers in the practice group other than their primary provider.

Turned On	Turned Off
View and interact with all patients in the practice	Only view and interact with patients whose provider is
group whose primary provider differs from the primary	the same as the primary provider selected on the Edit
provider selected on their staff account settings.	Office Staff page (Account > Staff Members > Staff
	tab > select Edit > Primary Provider dropdown).

Staff members' permissions are independent of their linked provider.

Scenarios

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User	Share Patients Permission	Patient Visibility
Provider A	Off	Can only see their own patients
Drovidor D	On	they can see A, B, C or all patients in the PG
Provider B	OII	Can all patients in the practice group
Provider C	On	Can see all patients in the practice group
(taff A //induction and iden A)	Off	Can only see provider A's patients regardless if
Stall A (Illiked to provider A)	OII	provider A has the permission on or off.
Staff A (linked to provider A)	On	Can see all patients in the practice group
Staff B (linked to provider B) Off	Can only see provider B's patients regardless if	
	provider B has the permission on or off.	
Staff B (linked to provider B)	On	Can see all patients in the practice group

Show Billing Summary

Turned On	Turned Off
Access Billing > Billing Summary.	No access to Billing > Billing Summary.

Show Billing Tab

Turned On	Turned Off
Access the Billing tab in the appointment window and	No access to the Billing tab in the appointment and
clinical note.	clinical note.

Show Patient Balance

Turned On	Turned Off

Turned On	Turned Off
• The patient's balance is shown in the	• The patient's balance doesn't appear in the
appointment.	appointment.
• Provides access to the Balance tab in the patient	• The Balance tab isn't available in the patient
chart.	chart.

Sign/Lock Clinical Notes

Turned On	Turned Off
Sign and lock clinical notes. The Sign & Lock button	No Sign & Lock button when you preview a note.
appears when the note is previewed.	
If turned on for a staff user, they can sign and lock	
clinical notes; however, the provider's name will	
appear on the note, not the user's.	

Single Patient EHI Export

Turned On	Turned Off
Export data for a single patient.	Can't export data for a single patient.

Use iPad EHR

Turned On	Turned Off
Log in and use the DrChrono EHR app for iPhone and iPad.	The DrChrono EHR app shows an error when you attempt to log in to the app. If this permission is turned off while you're logged in, an error message appears, and you are logged out of
	the EHR app. When you try to log in again, you're alerted that you don't have access to the EHR app.

User Patient Chart Header Settings

Turned On	Turned Off
Customize the patient chart header settings at the user	Can't customize the patient chart header settings at
level.	the user level.

User Patient Chart Sidebar Nav Settings

Turned On	Turned Off
Customize the patient chart sidebar settings at the	Can't customize the patient chart sidebar settings at
user level.	the user level.

View Practice Group

Turned On	Turned Off

Turned On	Turned Off
View the collective information for all providers in the practice.	Can only see the information for the individual providers you have access to.
	Hannah Provider → Leah Sample (Isample) じ Hannah Provider U ⊡ = +

Related articles

Practice Group Dropdown