

# Account Permissions Overview

Last modified on 05/21/2025 7:22 pm EDT

[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 not turned on, 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
Staff can view and manage messages for multiple providers in the practice group.	Staff can only view and manage messages for their associated primary provider selected on the <b>Edit Office Staff</b> page. ( <b>Account &gt; Staff Members &gt; Staff</b> tab > select <b>Edit &gt; Primary Provider</b> box).

### Access Balance/Ledger

Turned on	Turned off
Access <b>Billing &gt; Patient Balance Ledger</b>	No access to <b>Billing &gt; Patient Balance Ledger</b>

## Access Billing

Turned on	Turned off
Access the <b>Billing</b> menu	<ul style="list-style-type: none"><li>No access to the <b>Billing</b> menu.</li><li>You can still enter codes in appointments and clinical notes on the <b>Billing</b> tab.</li></ul>

## Access Clinical Notes

Turned on	Turned off
Access and view clinical notes in various areas of DrChrono	Receive a "permission denied" message when trying to view clinical notes in: <ul style="list-style-type: none"><li>The appointment (both on the schedule and in the patient chart)</li><li><b>Clinical &gt; Clinical Notes</b></li><li><b>Live Claims Feed</b></li></ul>

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		<a href="#">Edit Appointment</a> <a href="#">Edit Note</a>

## 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 Version   
Pt Payment \$ 0 Copay: \$20.00  
Payment Profile   
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: A scheduled appointment cannot be converted to a recurring series.  
☐ Arrange a Follow-up Reminder  
☐ View Active Reminders:

[Delete](#) [Save & Close](#) [Save](#) [Cancel](#)

## Access Institutional Billing>

### Turned on

Enter information for institutional UB04 forms.

### Turned off

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 toggle switch on, you receive an "access denied" message.

### With Access Institutional Billing Permission Enabled

Jenny (Jen) Harris - 04/15/2021  
Telehealth [33] - Exam 1

[View Service](#) [+ EOB](#) [SuperBill](#) [Clinical Note](#) [UB04](#) [UB04 \(text\)](#) [Print Screen](#)

**Institutional Claim** ☒

**Billing Status**   
ICD Version   
Pt Payment \$ 0 Copay: \$20.00  
Payment Profile   
Pt Payment Due   
Billing Profile   
Billing Pick List   
Diagnosis Pick List   
Referral #   
Purchased Serv   
Appointment Notes   
Billing Notes

**Info** **Cond & Occ** **Value Code** **Insurance** **Attending**

**Claim Type**   
**Facility Type**   
**Care Type**   
**Billing Sequences**   
**Stm Cover Period**   
**Adm Date & Hour**   
**Type of Admission**   
**Point of Origin**   
**Discharge Hour**   
**Pl Discharge St**   
**Principal Dx Code**   
**Admitting Dx Code**   
**Reason for Visit**   
**Enter Cause of Inj**   
**Remarks**

### 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** ☐

**Access to drbrendan.drchrono.com was denied**  
You don't have authorization to view this page.  
HTTP ERROR 403

[Reload](#)

## Access Patient Analytics

### Turned on

### Turned off

Turned on	Turned off
Access to <b>Reports &gt; Patient Report</b>	No access to <b>Reports &gt; Patient Report</b>

## Access Patient Payments

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

The screenshot shows the DrChrono Billing interface. A modal error message is displayed: "Cash Create Modal Component is broken". The background interface includes tabs for Appointment, Billing, Eligibility, Vitals, Growthcharts, Flags, Log Comm., Revisions, and Custom Data. The Billing tab is active, showing fields for Billing Status, ICD Version, Patient Payment, Pre Authorization Approval, Referral #, Payment Profile, Billing Profile, Billing Pick List, Diagnosis Pick List, and Credit Card Payment. There are also sections for D-10 Codes, CPT Codes, and HCPCS Codes.

## Access Patient Statements

Turned on	Turned off
Access <b>Billing &gt; Patient Statements</b>	No access to <b>Billing &gt; Patient Statements</b>

## Access Reports

Turned on	Turned off
Access <b>Reports &gt; Practice Reports</b>	No access to <b>Reports &gt; Practice Reports</b>

## Access Scheduling

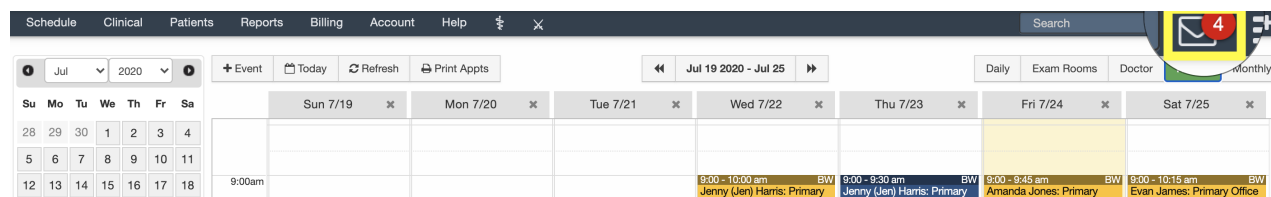
Turned on	Turned off
Access the schedule as well as view and schedule appointments	<p>Can't see or access any of the patient's appointments.  <b>Note:</b> Staff accounts must land on the <b>Dashboard</b> when they log in; otherwise, they won't be able to access DrChrono after logging in because they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

## Access to eRx

Turned on	Turned off
<ul style="list-style-type: none"> <li>Access to the <b>Send eRx</b> function in the patient's chart.</li> <li>You can prescribe medications.</li> </ul> <p>If <b>Send eRx</b> 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.</p> <ul style="list-style-type: none"> <li>Access to <b>Account &gt; eRxSettings</b></li> </ul>	No access to the <b>Send eRx</b> and <b>eRx Settings</b> features.

## Access to Message Center

Turned on	Turned off
<p>Access the <b>Message Center</b> along with faxing/messaging capabilities from the patient chart and clinical note, allowing you to:</p> <ul style="list-style-type: none"> <li>View messages</li> <li>Fax documents</li> <li>Send referrals</li> </ul>	Can't access the <b>Message Center</b> or perform any tasks in the <b>Turned on</b> description while in the message and/or the patient chart.



## Access Patient Statements

Turned on	Turned off
Access <b>Billing &gt; Patient Statements</b>	No access to <b>Billing &gt; Patient Statements</b>

## Add New Referring Sources

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

## 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.&lt;br/&gt;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"/>	

## Appointment Provider Selection

Turned on	Turned off
Staff can schedule appointments for all providers in the practice group.	Staff can only schedule appointments for their associated primary provider selected on the <b>Edit Office Staff</b> page. ( <b>Account &gt; Staff Members &gt; Staff</b> tab > select <b>Edit &gt; Primary Provider</b> box).

## With Appointment Provider Selection permission enabled

**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: \$1503.00 Generate Statement Balance: \$1503.00

66 past appointments CDS: Mammogram screening for all women aged 40-74 Needs Authorization: Needs prior auth for procedure on 1/31.

Provider: **James Smith** (selected) ←

Patient: Jenny (Jen) Harris - 02/11/1980 Office: Primary Office

Reason: Profile: -----

Scheduled: 04/27/2021 Time: 01:30PM Exam: Exam 1

Duration: 30 minutes Allow overlapping Color: Status: 0h 2m

Notes: View Clinical Note

Consent Forms: View All Appointments

Recurring Appointment: A scheduled appointment cannot be converted to a recurring series.

Arrange a Follow-up Reminder

View Active Reminders:

Delete Save & Close Save Cancel

## Without Appointment Provider Selection permission enabled

**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: \$1503.00 Generate Statement Balance: \$1503.00

66 past appointments CDS: Mammogram screening for all women aged 40-74 Needs Authorization: Needs prior auth for procedure on 1/31.

Patient: Jenny (Jen) Harris - 02/11/1980 Office: Primary Office

Reason: Profile: -----

Scheduled: 04/27/2021 Time: 01:30PM Exam: Exam 1

Duration: 30 minutes Allow overlapping Color: Status: 0h 1m

Notes: View Clinical Note

Consent Forms: View All Appointments

Recurring Appointment: A scheduled appointment cannot be converted to a recurring series.

Arrange a Follow-up Reminder

View Active Reminders:

Delete Save & Close Save Cancel

## Edit Office Staff

First name: Nick

Last name: Rivera

Primary Provider: **Brendan Wilberton** (selected) →

Email address: Username: hdmick Home phone: Cell phone: (555) 555-6425

Send daily billing report? iPad unlock code: 7206 Restrict offices? Use new dashboard? ☒

# Archive Signed Consent Forms

## Turned on

Archive signed consent forms.

In a patient chart > **Documents** section > **Signed Consent Forms** tab, the **Archive Consent Form** button appears.

Refer to [Archiving Signed Consent Forms](#).

## Turned off

Can't archive signed consent forms.

## With Archive Signed Consent Forms Enabled

SAJ000001

Laurie T. Sample (Female | 32 years old | Dec. 8, 1990)

Phone: (555) 555-5555 Email: sample@fakes.com Date Added: Jan. 4, 2022

Address: 123 Fake St Sunnyvale, CA 94089 Last Scheduled Appt: Thu Apr 13, 2023 Next Scheduled Appt: Thu Apr 20, 2023

CDS: Sample CDS Group Dolphin Problems Patient must have documented allergies Adult Immunization Schedule Age: 27-49

Primary Provider: Dr. James Smith

Consent Forms: **Archive Consent Form** (selected) ←

Archived Signed Consent Forms

Consent Form	Date of Appointment	Date of Signature	Actions
HIPAA Data Use Agreement	May 16, 2023 9:10 AM	May 17, 2023 9:10 AM	Fax Consent Form Fax Signature <a href="#">Send to onpatient</a> <b>Archive Consent Form</b>
No Show Policy	May 16, 2023 9:10 AM	May 17, 2023 9:10 AM	Fax Consent Form Fax Signature <a href="#">Send to onpatient</a> <b>Archive Consent Form</b>

## Without Archive Signed Consent Forms Enabled

SAJ000001

Laurie T. Sample (Female | 32 years old | Dec. 8, 1990)

Phone: (555) 555-5555 Email: sample@fakes.com Date Added: Jan. 4, 2022

Address: 123 Fake St Sunnyvale, CA 94089 Last Scheduled Appt: Fri Jul 21, 2023 Next Scheduled Appt: Fri Jul 28, 2023

CDS: Patient must have documented allergies Adult Immunization Schedule Age: 27-49



Signed Consent Forms

Consent Form	Date of Appointment	Date of Signature	Actions
HIPAA Data Use Agreement	Jun 15, 2023 1:00 PM	Jun 15, 2023 7:51 AM	Fax Consent Form Fax Signature <a href="#">Send to onpatient</a>
No Show Policy	Jun 15, 2023 1:00 PM	Jun 15, 2023 7:51 AM	Fax Consent Form Fax Signature <a href="#">Send to onpatient</a>

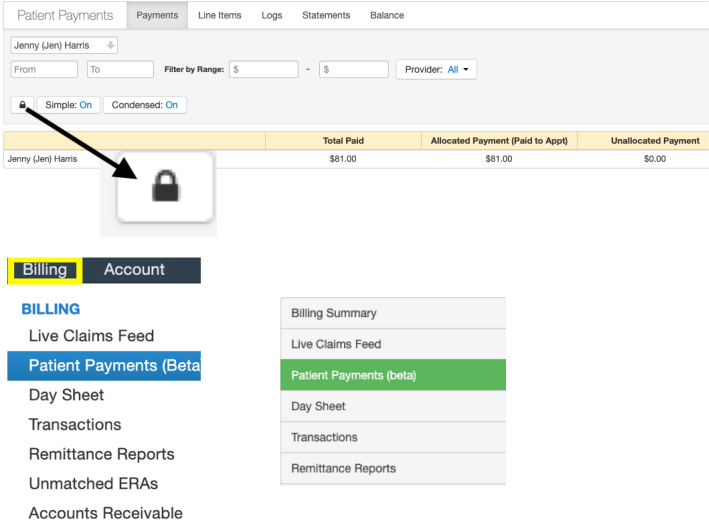
# Billing Administrator

## Turned on

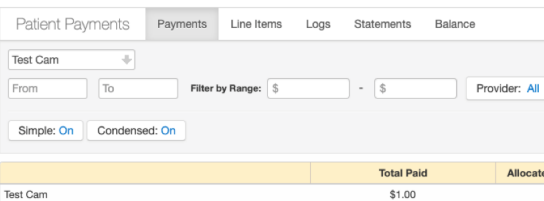
## Turned off

Turned on	Turned off
<ul style="list-style-type: none"> <li>• <b>Delete patient payments</b> and <b>unallocate</b> line item payments in the <b>Patient Payments</b> section by selecting the lock icon  .</li> <li>• Access Square setup and settings in <b>Account</b> &gt; <b>Account Settings</b> &gt; <b>Patient Payments</b> tab.</li> </ul>	<ul style="list-style-type: none"> <li>• Can't delete payments or unallocate line item payments. The lock icon  doesn't appear on the <b>Patient Payments</b> tab.</li> <li>• Can't access Square setup and settings. You receive an error message.</li> </ul>


#### With Billing Administrator Permission Enabled



#### Without Billing Administrator Permission Enabled



## 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.

## Create and Update Contacts

Turned on	Turned off
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## Turned on

Add contacts to the account in the **Message Center** > **Contacts** and the **Create New Contact** option when sending a referral.

## Turned off


- No access to the **Contacts** section in **Message Center**, and receives a Permission Denied error message.
- 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

Create patients and grant access to patient charts.

## Turned off

- 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  in the **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.



With create and update patients permission enabled

Schedule Appointment

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

Type Appointment Video Visit Break Walk-in Transition of Care New Patient Referral

Provider: Brendan Wilberton

Patient: [Patient Selection] Office: Primary Office

Reason: [Text Box]

Scheduled: 04/27/2021 Time: 12:40PM

Duration: 30 minutes Allow overlapping

Notes: [Text Box]

Exam: Exam 1

Color: [Color Selection]

Status: [Status Selection]

Consent Forms: [HIPAA Data Use Agreement (default)] [No Show Policy (default)]

[View Clinical Note]

[View All Appointments]

[Recurring Appointment] [Arrange a Follow-up Reminder] [View Active Reminders]

[Delete] [Save & Close] [Save] [Cancel]

Without create and update patients permission enabled

Schedule Appointment

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

Type Appointment Video Visit Break Walk-in Transition of Care New Patient Referral

Provider: Brendan Wilberton

Patient: [Patient Selection] Office: Primary Office

Reason: [Text Box]

Scheduled: 04/26/2021 Time: 11:00AM

Duration: 30 minutes Allow overlapping

Notes: [Text Box]

Exam: Exam 1

Color: [Color Selection]

Status: [Status Selection]

Consent Forms: [HIPAA Data Use Agreement (default)] [No Show Policy (default)]

[View Clinical Note]

[View All Appointments]

[Recurring Appointment] [Arrange a Follow-up Reminder] [View Active Reminders]

[Delete] [Save & Close] [Save] [Cancel]

# Drug Interactions Check

Turned on	Turned off
Access the <b>Drug Interactions</b> section in the patient chart or clinical note.	No access to the <b>Drug Interactions</b> section in the patient chart or clinical note.

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). <a href="#">more</a>
C	Moderate	oxymetazoline nasal	phenTermine	Sympathomimetics may enhance the adverse/toxic effect of other Sympathomimetics. <a href="#">more</a>
C	Moderate	prochlorperazine	phenTermine	Antipsychotic Agents may diminish the stimulatory effect of Amphetamines. <a href="#">more</a>
C	Moderate	LORazepam	prochlorperazine	CNS Depressants may enhance the adverse/toxic effect of other CNS Depressants. <a href="#">more</a>
C	Moderate	prochlorperazine	cetirizine	Anticholinergic Agents may enhance the adverse/toxic effect of other Anticholinergic Agents. <a href="#">more</a>
C	Minor	phenTermine	cetirizine	Amphetamines may diminish the sedative effect of Antihistamines. <a href="#">more</a>
B	Minor	LORazepam	levonorgestrel	Progestins (Contraceptive) may decrease the serum concentration of Benzodiazepines (metabolized by glucuronidation). <a href="#">more</a>

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

# Emergency Access

Turned on	Turned off
Select <b>Emergency Access</b> on the login page to temporarily request the <b>Create and Update Patients</b> , <b>Access Scheduling</b> , and <b>Access Clinical Notes</b> system permissions.	Can't request emergency access.

# ePS Enrollment (Edit)

Turned on	Turned off
Access <b>Billing &gt; Enrollment</b> to see, modify, submit, and/or delete EDI, ERA, and RTE requests with ePS	No access to <b>Billing &gt; Enrollment</b>

# ePS Enrollment (Read Only)

Turned on	Turned off
Access <b>Billing &gt; Enrollment</b> to see EDI, ERA, and RTE requests with ePS and their current status, but can't make any changes or updates	No access to <b>Billing &gt; Enrollment</b>

## Export Patients

Turned on	Turned off
Export patient data in bulk in a CSV or bulk export C-CDA files from the <b>Patient List</b> page.	No <b>Export (CSV)</b> or <b>Export (C-CDA XML)</b> buttons appear on the <b>Patient List</b> page.

Patients Reports

PATIENT

Patient List

Consent Forms

Patient Flags

Patient Groups

Send Email

Send Referral

**With Export Permission Enabled**

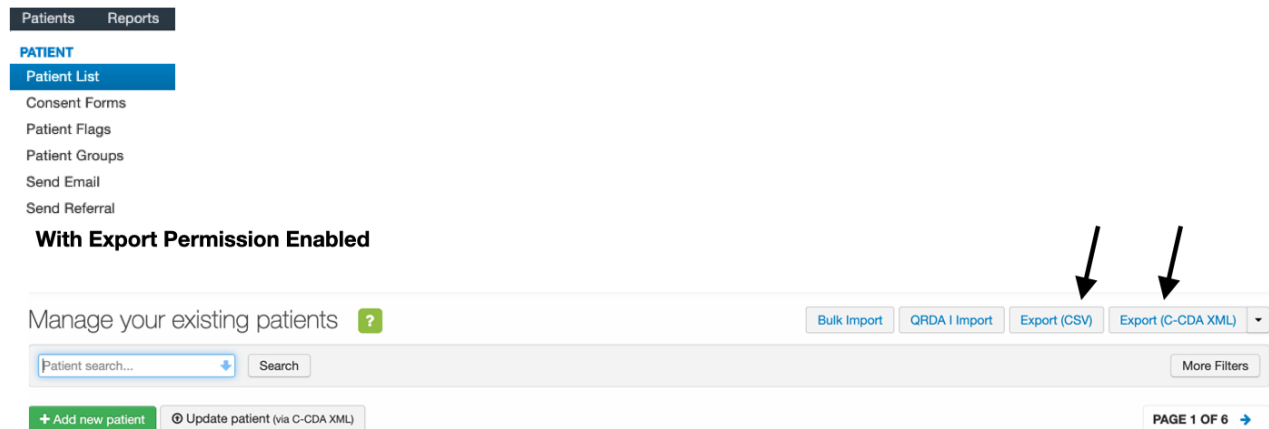
Manage your existing patients ?

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 →

A screenshot of the 'Patient List' page in a healthcare system. The page has a sidebar with navigation links: Patients, Reports, PATIENT, Patient List, Consent Forms, Patient Flags, Patient Groups, Send Email, and Send Referral. The main content area is titled 'With Export Permission Enabled'. It shows a header 'Manage your existing patients' with a help icon. Below this is a search bar with 'Patient search...' and a 'Search' button, and a 'More Filters' button. There are two buttons: '+ Add new patient' and 'Update patient (via C-CDA XML)'. At the bottom right, it says 'PAGE 1 OF 6'. In the top right corner, there are four buttons: 'Bulk Import', 'QRDA I Import', 'Export (CSV)', and 'Export (C-CDA XML)'. Two black arrows point to the 'Export (CSV)' and 'Export (C-CDA XML)' buttons.

### Without Export Permission Enabled

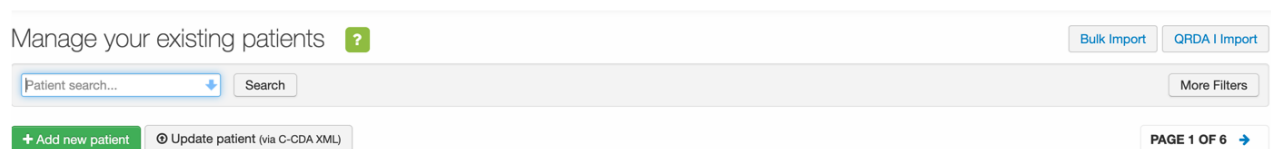
Manage your existing patients ?

Bulk Import QRDA I Import

Patient search... Search More Filters

+ Add new patient Update patient (via C-CDA XML)

PAGE 1 OF 6 →

A screenshot of the 'Patient List' page, similar to the one above but without the export buttons. The 'Export (CSV)' and 'Export (C-CDA XML)' buttons are missing from the top right corner.

## Manage Accounts

Turned on	Turned off
Access <b>Account &gt; Staff Members</b> to create, edit, and deactivate accounts for staff members	No access to <b>Account &gt; Staff Members</b> and receives a "permission denied" message

## Manage Permissions

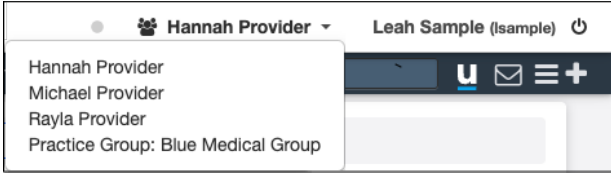
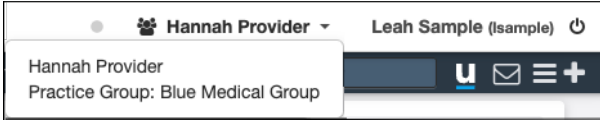
Turned on	Turned off
Access <b>Account &gt; Staff Permissions</b> to add or remove permissions to staff or provider accounts.	No access to <b>Account &gt; Staff Permissions</b> .

## Manage Templates

Turned on	Turned off
Access <b>Clinical &gt; Form Tools</b> to create and edit clinical forms.	No access to <b>Clinical &gt; Form Tools</b> to create and edit clinical forms.

## Provider Dropdown

Turned on	Turned off
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Turned on	Turned off
Can access multiple providers in a practice group.	Can only access information for their associated primary provider selected on the <b>Edit Office Staff</b> page. ( <b>Account &gt; Staff Members &gt; Staff tab &gt; select Edit &gt; Primary Provider box</b> ).
	

## SAML SSO Admin Dashboard

Turned on	Turned off
View the <b>SAML SSO Dashboard</b> to review and approve SSO requests.	Can't view the <b>SAML SSO Dashboard</b> to review and 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 <b>Account Settings</b> page. <b>Required: Settings permissions turned on.</b>	Can't access the <b>Account Settings</b> page.

## Custom Field Settings

Turned on + Settings Turned on	Turned off
Access the <b>Custom Manage Data</b> page. <b>Required: Settings permissions turned on.</b>	Can't access the <b>Custom Manage Data</b> page.

## Office Settings

Turned on + Settings Turned on	Turned off
Access the <b>Manage offices</b> page. <b>Required: Settings permissions turned on.</b>	Can't access the <b>Manage offices</b> page.

## OnPatient Settings

Turned on + Settings Turned on	Turned off
Access the <b>onpatient Settings</b> page. <b>Required: Settings permissions turned on.</b>	Can't access the <b>onpatient Settings</b> page.

## Share Patients

Turned on	Turned off
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Turned on	Turned off
View and interact with patients in the practice group whose primary provider differs from the primary provider selected on their staff account settings.	Only view and interact with patients whose provider is the same as the primary provider selected in their staff account settings.

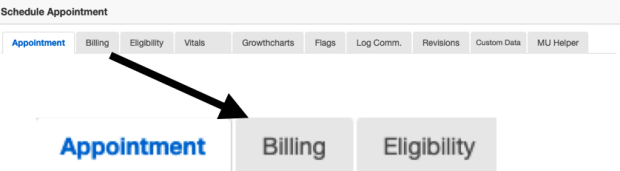
## Show Billing Summary

Turned on	Turned off
Access <b>Billing &gt; Billing Summary</b>	No access to <b>Billing &gt; Billing Summary</b>

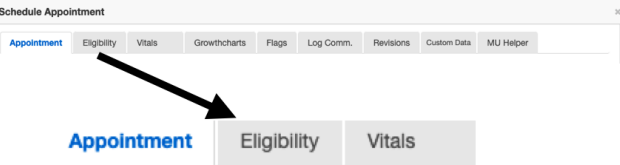
## Show Billing Tab

Turned on	Turned off
Access the <b>Billing</b> tab in the appointment window and clinical note.	No access to the <b>Billing</b> tab in the appointment and clinical note.

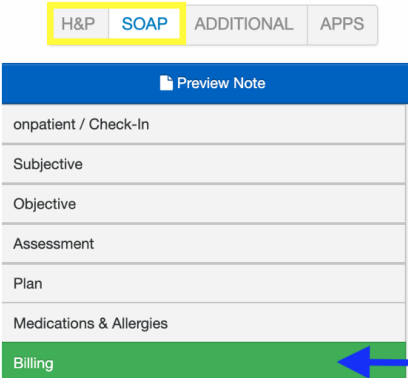
With Show Billing Tab Enabled In the Appointment Window



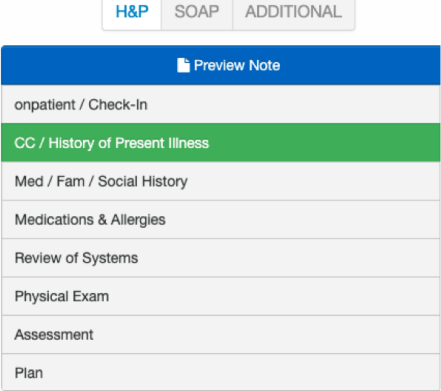
Without Show Billing Tab Enabled In the Appointment Window



With Show Billing Tab Enabled In the Clinical Note



Without Show Billing Tab Enabled In the Clinical Note



## Show Patient Balance

Turned on	Turned off
<ul style="list-style-type: none"> <li>The patient's balance is shown in the appointment.</li> <li>Provides access to the <b>Balance</b> tab in the patient chart.</li> </ul>	<ul style="list-style-type: none"> <li>The patient's balance doesn't appear in the appointment.</li> <li>The <b>Balance</b> tab isn't available in the patient chart.</li> </ul>

### With Show Patient Balance Enabled

Screenshot of the patient record interface with "Show Patient Balance Enabled". The "Patient Statement Balance: \$1503.00" is displayed in a red box at the top. A blue arrow points to the "Balance" tab in the bottom navigation bar.

### Without Show Patient Balance Enabled

Screenshot of the patient record interface with "Show Patient Balance Disabled". The "Patient Statement Balance" is not visible. The "Balance" tab is still present in the bottom navigation bar.

## Sign/Lock Clinical Notes

### Turned on

Sign and lock clinical notes. The **Sign & Lock** button 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.

### Turned off

No **Sign & Lock** button when you preview a note.

### With Sign/Lock Clinical Notes Permission Enabled

Screenshot of the clinical notes toolbar with "Sign & Lock" permission enabled. The "Sign & lock" button is visible.

### Without Sign/Lock Clinical Notes Permission Enabled

Screenshot of the clinical notes toolbar with "Sign & Lock" permission disabled. The "Sign & lock" button is not visible.

## Use iPad EHR

### Turned on

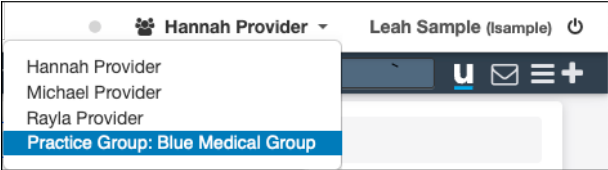
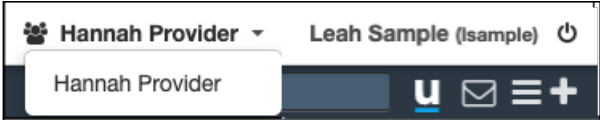
You can log in and use the DrChrono EHR app for iPhone and iPad.

### Turned off

You receive an error when you try to log in to the DrChrono EHR app.

Screenshot of the DrChrono EHR app login screen showing an error message: "User does not have access to iPad."

## View Practice Group

Turned on	Turned off
<p>View the collective information for all providers in the practice.</p>  <p>The screenshot shows a user interface with a dark header. On the left, there is a dropdown menu labeled 'Hannah Provider' with a list of options: 'Hannah Provider', 'Michael Provider', 'Rayla Provider', and 'Practice Group: Blue Medical Group'. The 'Practice Group: Blue Medical Group' option is highlighted in blue. To the right of the dropdown, the text 'Leah Sample (Isample)' is visible, followed by a power icon. Below the header, there are icons for a user profile, a document, a mail icon, and a plus sign.</p>	<p>Can only see the information for the individual providers you have access to.</p>  <p>The screenshot shows a user interface with a dark header. On the left, there is a dropdown menu labeled 'Hannah Provider' with a single option: 'Hannah Provider'. To the right of the dropdown, the text 'Leah Sample (Isample)' is visible, followed by a power icon. Below the header, there are icons for a user profile, a document, a mail icon, and a plus sign.</p>