

Account Permissions Overview

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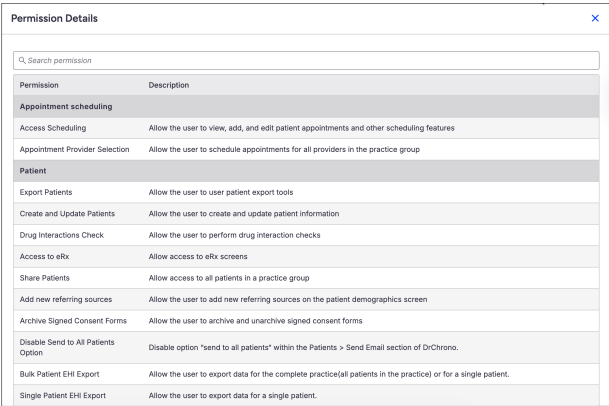
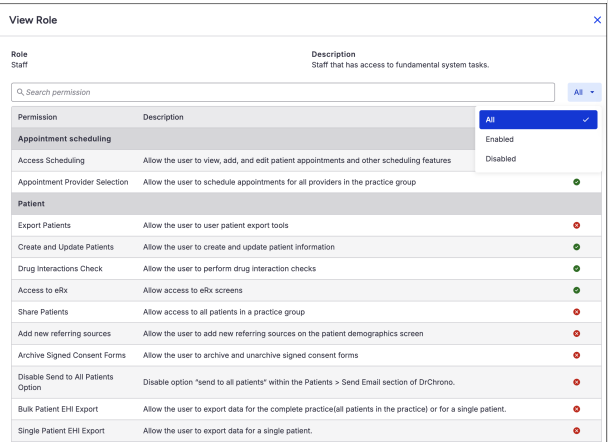
[View permission details](#) | **Permissions by letter: A | B | C | D | E | M | P | S | U | V**

DrChrono has permissions that can grant or restrict access to different areas of the system. Permissions and their descriptions are listed on the [Roles & Permissions](#) page.



When the permission is disabled, you typically see a “permission denied” message if you try to access a page or feature you’re not authorized to use.

View permission details

| All Permissions | System Role Permissions |
|--|---|
| <ol style="list-style-type: none"> Select Account > Practice Management > General Management > Roles & Permissions. Select Permission Details to open the Permission Details drawer. | <ol style="list-style-type: none"> Select Account > Practice Management > General Management > Roles & Permissions. Select View for a specific role to open the View Role drawer. |
| <p>Permissions are organized by category. You can also search for specific permissions.</p>  | <p>Permissions are organized by category. You can also search for specific permissions or filter by enabled or disabled permissions.</p>  |

Access All Messages for Practice Group

| Turned On | Turned Off |
|--|---|
| <p>View and manage messages and tasks for all providers in the practice group.</p> | <ul style="list-style-type: none"> Providers can only view and manage their own and assigned messages and tasks. Staff can only view and manage messages for their associated primary provider selected on the Staff page. |



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.



The DrChrono Support team manages PG settings. [Create a support case](#) to have the **Share Communications** PG setting turned on or off.

This permission controls whether a user can view and manage messages for all providers in the practice group—but it only takes effect when the **Share Communications** PG-level setting is set to **Share among all providers in the PG**. If that setting is off, message sharing is disabled for everyone regardless of this permission.



A staff member's unread message count reflects their primary provider's access level. If the primary provider has access to all messages, the staff member's count will include those messages even if the staff member's own permission is off.

| Permission State | What Provider Sees | What Staff Sees |
|------------------|---|--|
| On | All messages and tasks in Message Center | All messages and tasks in Message Center |
| Off | Own + assigned messages and tasks | 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. | <ul style="list-style-type: none"> 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 DrChrono. | Receive a "permission denied" message when trying to view clinical notes in: <ul style="list-style-type: none"> The appointment (both on the schedule and in the patient chart) Clinical > Clinical Notes Live Claims Feed |

Access Institutional Billing

| Turned On | Turned Off |
|-----------|------------|
|-----------|------------|

| 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 toggle switch on, you receive an "access denied" 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, patient's chart/patient payments, the Live Claims Feed , and the DrChrono EHR app. | Access to Patient Payments is denied when Access Billing and Access Patient Payments permissions are 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 appointments. | Can't see or access any of the patient's 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 |
|---|---|
| <ul style="list-style-type: none"> • Access to the Send eRx function in the patient's chart. • You can prescribe medications. <p>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.</p> <ul style="list-style-type: none"> • Access to Account > eRx Settings. | <p>No access to the Send eRx and eRx Settings features.</p> |

Access to Message Center

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

Add New Referring Sources

| Turned On | Turned Off |
|--|--|
| <p>Add referring/ordering provider information to a patient chart.</p> | <p>Can't add referring/ordering provider information to a patient chart.</p> |

Appointment Provider Selection

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

Archive Signed Consent Forms



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

Related article

[Archiving Signed Consent Forms](#)

Billing Administrator

| Turned On | Turned Off |
|-----------|------------|
|-----------|------------|

| Turned On | Turned Off |
|--|---|
| <ul style="list-style-type: none"> • Delete patient payments and unallocate line item payments in the Patient Payments section by selecting the lock icon  . • Access Square setup and settings in Account > Account Settings > Patient Payments tab. | <ul style="list-style-type: none"> • Can't delete payments or unallocate line item payments. The lock icon  doesn't appear on the Patient Payments tab. • Can't access Square setup and |

Related articles

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

Bulk Patient EHI Export

| Turned On | Turned Off |
|--|--|
| Export data for all patients in the practice or for one patient. | Can't export data for all patients in the practice or for 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 intervention (DSI) rules. | Can't view, create, edit, or deactivate DSI rules. |

Create and Update Contacts

| Turned On | Turned Off |
|--|--|
| Add contacts to the account in the Message Center > Contacts > Create New Contact option when sending a referral. | <ul style="list-style-type: none"> • No access to the Contacts section in Message Center. • 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 |
|-----------|------------|
|-----------|------------|

| Turned On | Turned Off |
|---|--|
| Create patients and grant access to patient charts. | <ul style="list-style-type: none"> • 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. |

Customize Clinical Notes Format

| Turned On | Turned Off |
|---|--|
| Turned on by default for providers. <ul style="list-style-type: none"> • Reorder forms in the clinical notes. • Add forms to clinical notes. • Delete forms from clinical notes. • Add page breaks to clinical notes. | Can view clinical note forms, but can't add, edit, or delete them. |

Disable Send to All Patients Option

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

Drug Interactions Check

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

Emergency Access

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

ePS Enrollment (Edit)

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

ePS Enrollment (Read Only)

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

Export Patients

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

Manage Accounts

| Turned On | Turned Off |
|--|-------------------------------------|
| Access the Staff page to create, edit, or deactivate accounts for staff members | No access to the Staff page. |

Manage App Directory

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

Manage Care Plans

| Turned On | Turned Off |
|-----------------------------|------------------|
| Create and edit care plans. | View care plans. |

Manage Care Plans and Show Care Plans permissions logic

The **Manage Care Plans** permission setting overrides the **Show Care Plans** setting. If **Manage Care Plans** = on, you can view and edit care plans regardless of the **Show Care Plans** permission setting.

- **Manage Care Plans** = on
 - Create or edit care plans.
- **Manage Care Plans** = off and **Show Care Plans** = on
 - View care plans
- Both permissions = off
 - Care Plans sections and fields are hidden

Related article

[Create a Patient Care Plan](#)

Manage Document Tag

| Turned On | Turned Off |
|---|--|
| Manage authorized apps in the App Directory . | Can't manage authorized apps in the App Directory . |
| Turned On | Turned Off |
| Create, edit, delete, and manage document tags in Tag Management . | Can't create, edit, delete, or manage document tags in Tag Management . |

Manage Form Tags

| Turned On | Turned Off |
|---|---|
| Create new or delete existing clinical form tags. | Can't create new or delete existing clinical form tags. |

Manage Permissions

| Turned On | Turned Off |
|--|---|
| Access the Roles & Permissions page to add or remove permissions to staff or provider accounts. | No access to the Roles & Permissions page. |

Manage Templates

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

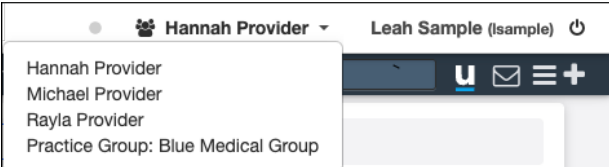
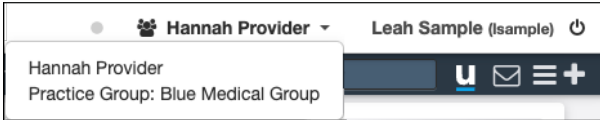
| Turned On | Turned Off |
|---|---|
| Customize the patient chart header settings for the practice at the administrative level. | Can't customize the patient chart header settings for the practice at the administrative level. |

Practice Patient Chart Sidebar Nav Settings

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

Provider Dropdown

| Turned On | Turned Off |
|--|--|
| Access multiple providers in a practice group. | Can only access information for their associated primary provider selected on the Staff page. |

SAML SSO Admin Dashboard

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

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. Required: Settings permissions turned on. | No access to the Account Settings page. |

Custom Field Settings

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

Office Settings

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

OnPatient Settings

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

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 group whose primary provider differs from the primary provider selected on the Staff page. | Only view and interact with patients whose provider is the same as the primary provider selected on the Staff page. |



Staff members' permissions are independent of their linked provider.

Scenarios

| User | Share Patients Permission | Patient Visibility |
|--------------------------------|---------------------------|---|
| Provider A | Off | Can only see their own patients |
| Provider B | On | Can see A, B, C, or all patients in the PG Can all patients in the practice group |
| Provider C | On | Can see all patients in the practice group |
| Staff A (linked to provider A) | Off | Can only see provider A's patients regardless of whether provider A has the permission on or off. |

| User | Share Patients Permission | Patient Visibility |
|--------------------------------|---------------------------|---|
| 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 of whether 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 clinical note. | No access to the Billing tab in the appointment and clinical note. |

Show Care Plans

To understand how the **Manage Care Plans** and **Show Care Plans** permissions work together, see [Manage Care Plans and Show Care Plans permissions logic](#).

| Turned On | Turned Off |
|------------------|------------------------|
| View care plans. | Can't view care plans. |

Show Patient Balance

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

Sign/Lock Clinical Notes

| Turned On | Turned Off |
|---|---|
| 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. | No Sign & Lock button when you preview a note. |

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. |

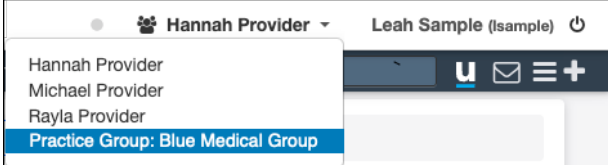
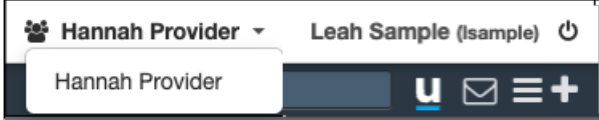
User Patient Chart Header Settings

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

User Patient Chart Sidebar Nav Settings

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

View Practice Group

| 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. |
|  |  |

Related article

[Practice Group Dropdown](#)