Account Permissions Overview

Last modified on 02/01/2026 9:22 pm EST

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** tab of 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 in the practice group.	• 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 **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.

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

- 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 DrChrono.	Receive a "permission denied" message when trying to 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

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

Turned On	Turned Off
• Access to the **Send eRx** function in the patient's chart. • You can prescribe medications. 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**.	No access to the **Send eRx** and **eRx Settings** features.

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 • Fax documents • Send referrals	Can't access the **Message Center** or perform any tasks in the **Turned on** description while in the message and/or the patient chart.

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.

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

Related article

Archiving Signed Consent Forms

Billing Administrator

Turned On	Turned Off

Turned On	Turned Off
• 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.	• 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 settings.

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.	• 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.	• 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.

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 **Account** > **Staff Members** to create, edit, or deactivate accounts for staff members	No access to **Account** > **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 Care Plan

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

Manage Document Tag

Turned On	Turned Off
Create, edit, delete, and manage document tags in **Tag Management**.	Can't create, edit, delete, and 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 **Account** > **Staff Permissions** to add or remove permissions to staff or provider accounts.	No access to **Account** > **Staff Permissions**.

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

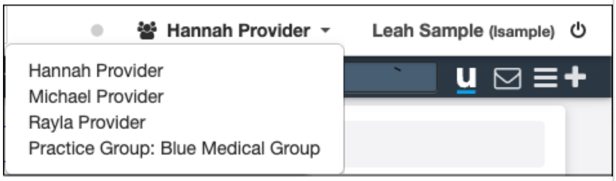
Turned On	Turned Off
Customize the patient chart header settings for the practice at the administrative level.	Can't customize the patient chart header settings for the practice at the administrative level.

Practice Patient Chart Sidebar Nav Settings

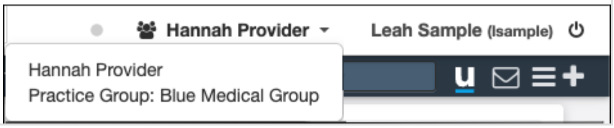
Turned On	Turned Off
Customize the patient chart sidebar settings for the practice at the administrative level.	Can't customize the patient chart sidebar settings for the practice at the administrative level.

Provider Dropdown

<table>
<tr><th>Turned On</th><th>Turned Off</th></tr>
<tr><td>Access multiple providers in a practice group.



</td><td>Can only access information for their associated primary provider selected on the **Edit Office Staff** page (**Account** > **Staff Members** > **Staff** tab > select **Edit** > **Primary Provider** dropdown).



</td></tr>
</table>

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 their staff account settings.	Only view and interact with patients whose provider is the same as the primary provider selected on the **Edit Office Staff** page (**Account** > **Staff Members** > **Staff** tab > select **Edit** > **Primary Provider** dropdown).

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	they 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 if 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 clinical note.	No access to the **Billing** tab in the appointment and clinical note.

Show Patient Balance

Turned On	Turned Off

Turned On	Turned Off
• The patient's balance is shown in the appointment. • Provides access to the **Balance** tab in the patient chart.	• 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

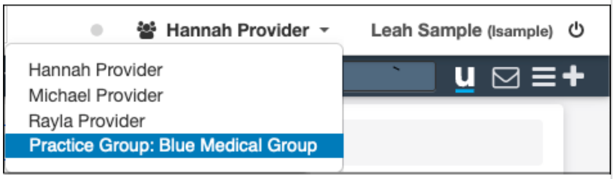
Turned On	Turned Off
Customize the patient chart header settings at the user level.	Can't customize the patient chart header settings at the user level.

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

<table>
<tr><th>Turned On</th><th>Turned Off</th></tr>
<tr><td>View the collective information for all providers in the practice.

</td><td>Can only see the information for the individual providers you have access to.

</td></tr>
</table>

Related articles

Practice Group Dropdown