

Account Permissions Overview

Last modified on 05/06/2025 12:29 pm EDT

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.

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

Access All Messages for Practice Group

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

With Access All Messages for Practice Group Permission Enabled

[illegible]

Without Access All Messages for Practice Group Permission Enabled

BillingAccountHelp

James SmithNick Rick

Incoming Messages

Mark as ReadMark as UnreadShow Archived

Search

Show number

	From	Title	Associated patient	Assigned to	Workflow	Created	Updated
<input type="checkbox"/>	edwinbo	Generated PDF: HAJE000001.pdf				April 28, 2021, 1:13 pm	April 28, 2021, 1:13
<input type="checkbox"/>	Jenny [Last] Harris	Online Appointment	Jenny [Last] Harris			April 15, 2021, 9:23 am	April 15, 2021, 9:23
<input type="checkbox"/>	Jenny [Last] Harris	Online Appointment	Jenny [Last] Harris			April 13, 2021, 11:39 am	April 13, 2021, 11:39
<input type="checkbox"/>	Homar J. Simpson	Online Appointment	Homar J. Simpson			April 5, 2021, 1:45 pm	April 5, 2021, 1:45 p
<input type="checkbox"/>	Jenny [Last] Harris	Online Appointment	Jenny [Last] Harris			Jan. 19, 2021, 10:40 am	Jan. 19, 2021, 10:40
<input type="checkbox"/>	Jenny [Last] Harris	Online Appointment	Jenny [Last] Harris			Jan. 19, 2021, 10:37 am	Jan. 19, 2021, 10:37
<input type="checkbox"/>	Homar J. Simpson	Online Appointment	Homar J. Simpson			Jan. 14, 2021, 5:57 pm	Jan. 14, 2021, 5:57 p
<input type="checkbox"/>	Homar J. Simpson	Medication	Homar J. Simpson	James Smith	James Smith	Oct. 15, 2020, 12:24 pm	Oct. 26, 2020, 14:11
<input type="checkbox"/>	Homar J. Simpson	Online Appointment Confirmed	Homar J. Simpson			Aug. 27, 2020, 10:24 am	Sept. 10, 2020, 11:14

Edit Office Staff

First name	<input type="text" value="Nick"/>
Last name	<input type="text" value="Riviera"/>
Primary Provider	<input type="text" value="James Smith"/>
Email address	<input type="text"/>
Username	<input type="text" value="hidnick"/>
Home phone	<input type="text" value="() - - -"/>
Cell phone	<input type="text" value="(555) 555-6425"/>
Send daily billing report?	<input type="checkbox"/>
iPad unlock code	<input type="text" value="7208"/>
Restrict offices?	<input type="checkbox"/>
Use new dashboard?	<input checked="" type="checkbox"/>

[Save staff account](#)

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

The screenshot shows the DrChrono interface with the 'Clinical' tab selected. The top navigation bar includes 'Clinical', 'Patients', and 'Reports'. The left sidebar lists various tools and clinical management options. The main content area displays patient information for Jenny (Jen) Harris, including appointment details and a 'Clinical Note' button. A red arrow points to the 'Clinical Note' button in the top right corner of the patient information section. Another red arrow points to the 'View Clinical Note' button in the bottom right corner of the appointment details section.

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 | | [Edit Appointment](#) | [Edit Note](#)

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** | **Copay** | **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 | **Patient** | **Reason** | **Scheduled** | **Time** | **Duration** | **Notes** | **Consent** | **Forms**

Brendan Wilberton | Michelle Harris - 10/14/1999 | | 03/31/2021 | 12:20PM | 30 minutes | | | |

[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	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.

With Access Institutional Billing Permission Enabled

Jenny (Jen) Harris - 04/15/2021
Telehealth [2] - Exam 1

View Service + EOB SuperBill Clinical Note UB04 UB04 (ext) Print Screen

Institutional Claim ☒ Yes

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

Claim Type
Facility Type
Care Type
Billing Sequences
Sim Cover Period
Adm Date & Hour
Type of Admission
Point of Origin
Discharge Hour
PI 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 [1] - Exam 1

View Service + EOB SuperBill Clinical Note

Institutional Claim ☐ No

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
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.

Schedule Appointment

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

Institutional Claim Patient SuperBill Clinical Note Billing C

Billing Status
ICD Version
Patient Payment \$ 1.00 +
Receipt
Pre Authorization Approval
Referral #
Payment Profile
Billing Profile
Billing Pick List
Diagnosis Pick List
Credit Card Payment

HCFA Box 10 - Is patient's condition related to:

Employment
Auto Accident
Other Accident
Onset Date Type
Onset Date
Other Date Type
Other Date

D-10 Codes
Code Description
D-9 Codes to Convert
Code Description
CPT Codes
Code Description
HCPCS Codes
Code Description

DrChrono

drbrendan.drchrono.com/billing/create_cash_popup/173679842/

Cash Create Modal Component is broken

Access Patient Statements

Turned on	Turned off
Access Billing > Patient Statements	No access to Billing > Patient Statements

Access Reports

Turned on	Turned off
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	<p>Can't see or access any of the patient's appointments.</p> <p>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.</p> <p>To set this up, go to Account > Account Settings > General tab and select the Use new dashboard home screen checkbox.</p>

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 > eRxSettings 	No access to the Send eRx and eRx Settings features.

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 	Can't access the Message Center or perform any tasks in the Turned on description while in the message and/or the patient chart.

Access Patient Statements

Turned on	Turned off
Access Billing > Patient Statements	No access to Billing > Patient Statements

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

↓

Will populate fields below

Referring Dr. First Name

Edward

Referring Dr. Middle Name

Referring Dr. Last Name

Jenner

Referring Dr. Suffix

Referring Dr. NPI Number

9876543210

Referring Dr. Qualifier

-- Qualifier --

▼

Referring Dr. Number

Referring Dr. Specialty

Primary Care Physician

▼

Referring Dr. Address

328 Gibraltar Dr.
Sunnyvale, CA 94089

Referring Dr. Email

Referring Dr. Phone

(844) 569-8628

Referring Dr. Fax

XXX-XXX-XXXX

Referring Source

↓

Primary Care Physician

Referral Number

Appointment Provider Selection

Turned on	Turned off
Schedule appointments for all providers in the practice group.	Can only schedule appointments for the primary provider listed on their staff account settings.

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: (850) 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 8:13 AM	May 17, 2023 9:08 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form
HIPAA Data Use Agreement	May 16, 2023 8:00 AM	May 17, 2023 8:00 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form
No Show Policy	May 16, 2023 8:00 AM	May 17, 2023 8:00 AM	Fax Consent Form Fax Signature Send to onpatient Archive Consent Form

Without Archive Signed Consent Forms Enabled

SAJ000001

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

Phone: (850) 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

Consent Forms: **Archive Consent Form** (disabled)



Archived 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 Send to onpatient
No Show Policy	Jun 15, 2023 1:00 PM	Jun 15, 2023 7:51 AM	Fax Consent Form Fax Signature Send to onpatient

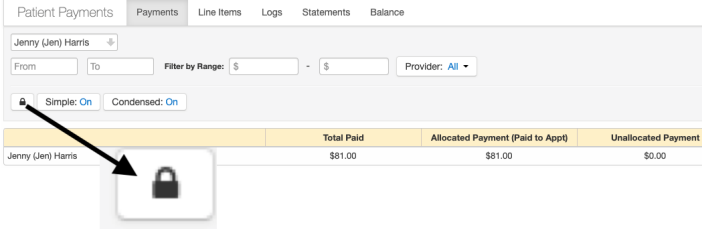
Billing Administrator

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 settings. You receive an error message.

With Billing Administrator Permission Enabled



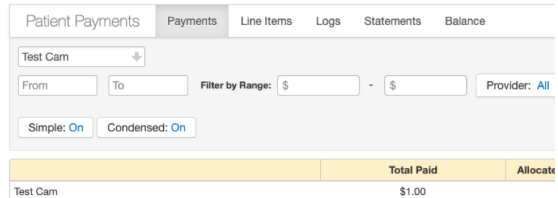
Billing Account

BILLING

Live Claims Feed
Patient Payments (Beta)
 Day Sheet
 Transactions
 Remittance Reports
 Unmatched ERAs
 Accounts Receivable

Billing Summary
Live Claims Feed
Patient Payments (beta)
Day Sheet
Transactions
Remittance Reports

Without Billing Administrator Permission Enabled



Break the Glass Review



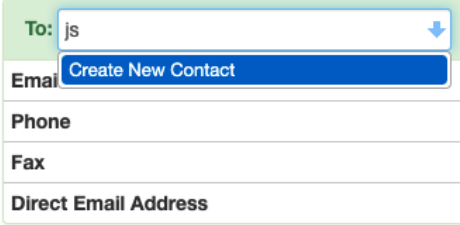
This permission is part of a significant feature enhancement not yet available to users. We will have more information about how to use this permission and the best practices when it is released.

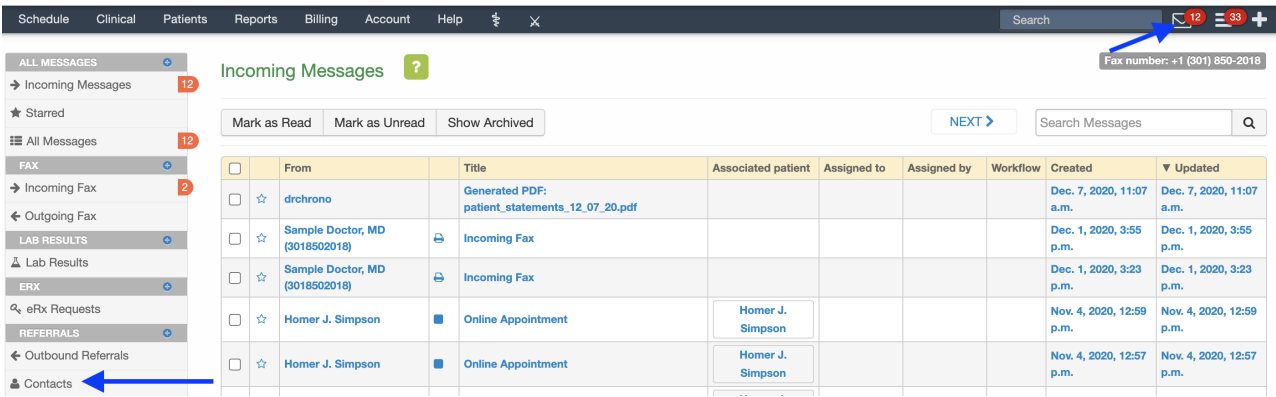
Turned on	Turned off
Review and approve break-the-glass requests	Can't view or approve break-the-glass requests

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	Turned off
<p>Add contacts to the account in the Message Center > Contacts and the Create New Contact option when sending a referral.</p> 	<ul style="list-style-type: none"> 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.



The screenshot shows the OnPatient web application interface. The top navigation bar includes links for Schedule, Clinical, Patients, Reports, Billing, Account, and Help. The left sidebar shows a list of messages and contacts. The main area displays 'Incoming Messages' with a table of messages. A blue arrow points to the 'Contacts' link in the left sidebar.

	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated PDF: patient_statements_12_07_20.pdf					Dec. 7, 2020, 11:07 a.m.	Dec. 7, 2020, 11:07 a.m.
<input type="checkbox"/>	Sample Doctor, MD (3018502018)	Incoming Fax					Dec. 1, 2020, 3:55 p.m.	Dec. 1, 2020, 3:55 p.m.
<input type="checkbox"/>	Sample Doctor, MD (3018502018)	Incoming Fax					Dec. 1, 2020, 3:23 p.m.	Dec. 1, 2020, 3:23 p.m.
<input type="checkbox"/>	Homer J. Simpson	Online Appointment	Homer J. Simpson				Nov. 4, 2020, 12:59 p.m.	Nov. 4, 2020, 12:59 p.m.
<input type="checkbox"/>	Homer J. Simpson	Online Appointment	Homer J. Simpson				Nov. 4, 2020, 12:57 p.m.	Nov. 4, 2020, 12:57 p.m.

Create and Update Patients

Turned on	Turned off
<p>Create patients and grant access to patient charts.</p>	<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.

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: [Reason Selection]

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

Duration: 30 minutes Allow overlapping

Notes: [Notes Text Area]

Exam: Exam 1

Color: [Color Selection]

Status: [Status Selection]

Consent Forms: [Consent Forms Selection]

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: [Reason Selection]

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

Duration: 30 minutes Allow overlapping

Notes: [Notes Text Area]

Exam: Exam 1

Color: [Color Selection]

Status: [Status Selection]

Consent Forms: [Consent Forms Selection]

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 Drug Interactions section in the patient chart or clinical note.	No access to the Drug Interactions 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). more
C	Moderate	oxymetazoline nasal	phenentermine	Sympathomimetics may enhance the adverse/toxic effect of other Sympathomimetics. more
C	Moderate	prochlorperazine	phenentermine	Antipsychotic Agents may diminish the stimulatory effect of Amphetamines. more
C	Moderate	LORazepam	prochlorperazine	CNS Depressants may enhance the adverse/toxic effect of other CNS Depressants. more
C	Moderate	prochlorperazine	cetirizine	Anticholinergic Agents may enhance the adverse/toxic effect of other Anticholinergic Agents. more
C	Minor	phenentermine	cetirizine	Amphetamines may diminish the sedative effect of Antihistamines. more
B	Minor	LORazepam	levonorgestrel	Progestins (Contraceptive) may decrease the serum concentration of Benzodiazepines (metabolized by glucuronidation). more

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 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, and/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.

Patients Reports

PATIENT

Patient List

Consent Forms

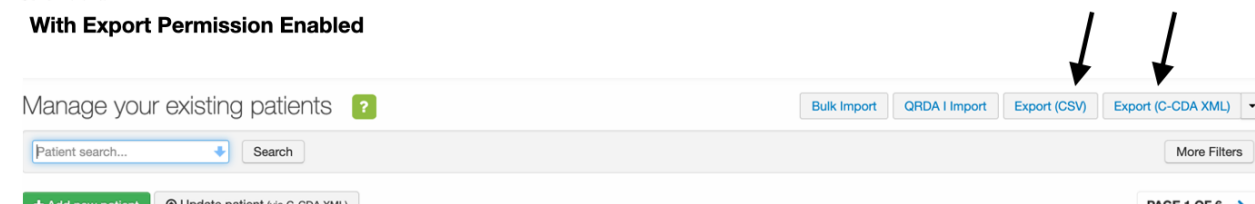
Patient Flags

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 →

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 →

Manage Accounts

Turned on	Turned off
Access Account > Staff Members to create, edit, and deactivate accounts for staff members	No access to Account > Staff Members and receives a Permission Denied message

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 .

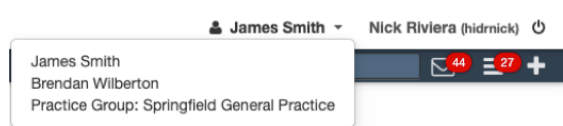
Manage Templates

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.

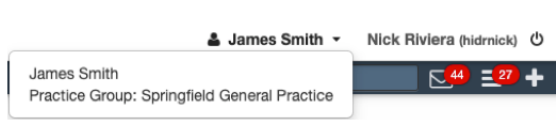
Provider Dropdown

Access multiple providers in a practice group.	Only access information for the primary provider selected on the user's staff account settings.

With Provider Dropdown Permission Enabled



Without Provider Dropdown Permission Enabled



Edit Office Staff

First name

Last name

Primary Provider

Email address

Username

Home phone

Cell phone

Send daily billing report? ☐

iPad unlock code

Restrict offices? ☐

Use new dashboard? ☒

[Save staff account](#)

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 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

Share Patients

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.

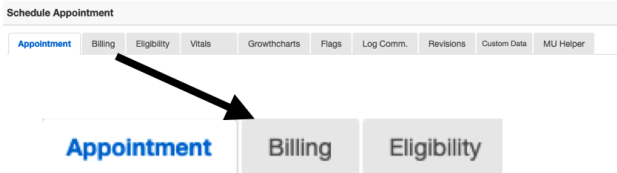
Show Billing Summary

Turned on	Turned off
Access Billing > Billing Summary	No access to Billing > Billing Summary

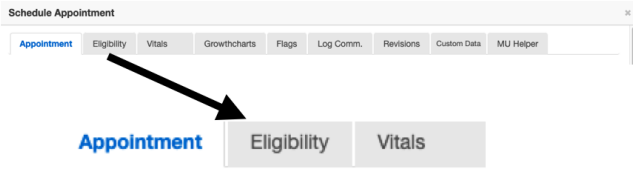
Show Billing Tab

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.

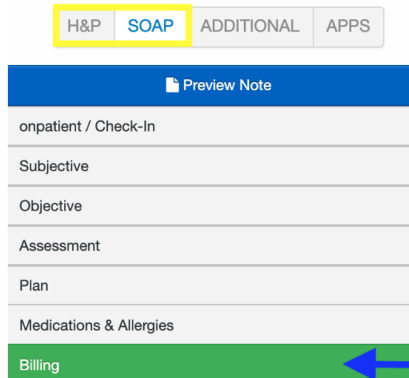
With Show Billing Tab Enabled In the Appointment Window



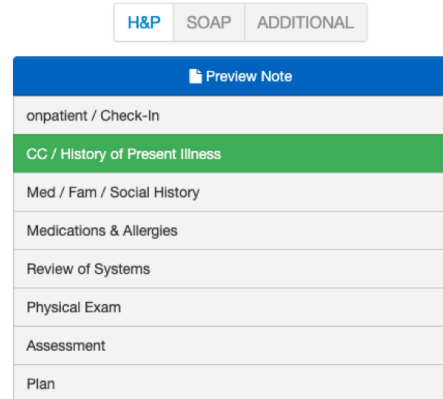
Without Show Billing Tab Enabled In the Appointment Window



With Show Billing Tab Enabled In the Clinical Note



Without Show Billing Tab Enabled In the Clinical Note



Show Patient Balance

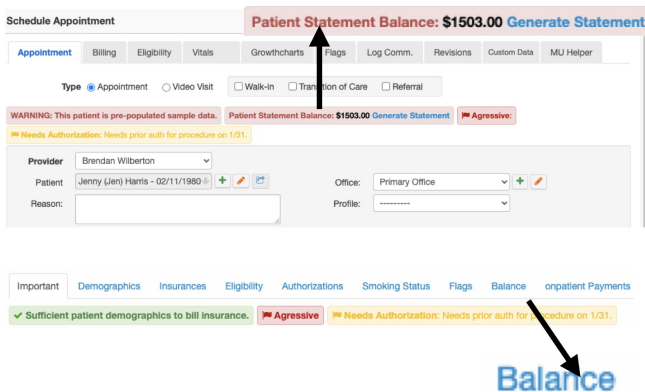
Turned on

- The patient's balance is shown in the appointment.
- Provides access to the **Balance** tab in the patient chart.

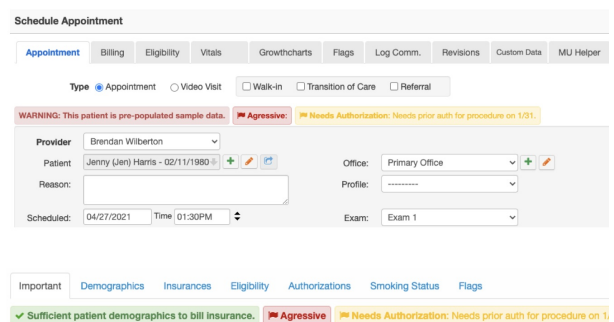
Turned off

- The patient's balance doesn't appear in the appointment.
- The **Balance** tab isn't available in the patient chart.

With Show Patient Balance Enabled



Without Show Patient Balance Enabled



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.

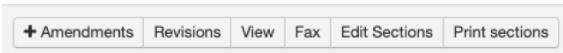
Turned off

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

With Sign/Lock Clinical Notes Permission Enabled

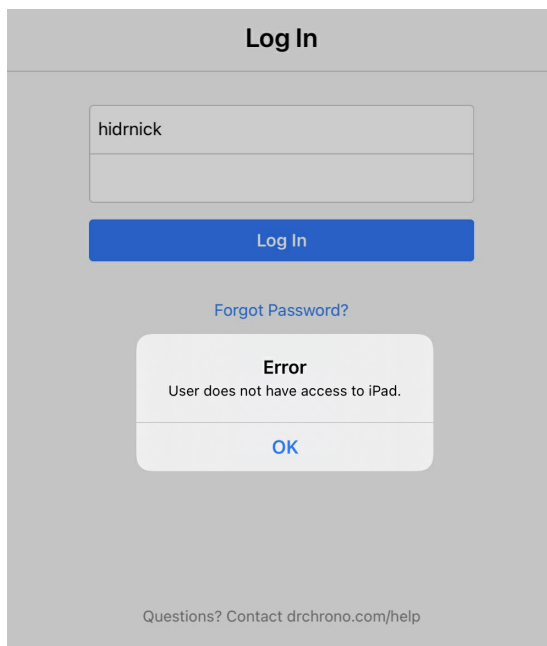


Without Sign/Lock Clinical Notes Permission Enabled



Use iPad EHR

Turned on	Turned off
You can log in and use the DrChrono EHR app for iPhone and iPad.	You receive an error when you try to log in to the DrChrono EHR app.



View Practice Group

Turned on	Turned off
View information for all providers in the practice. Learn more about the practice group dropdown.	You can only see the information for the individual providers you have access to.

View Practice Group Turned on

