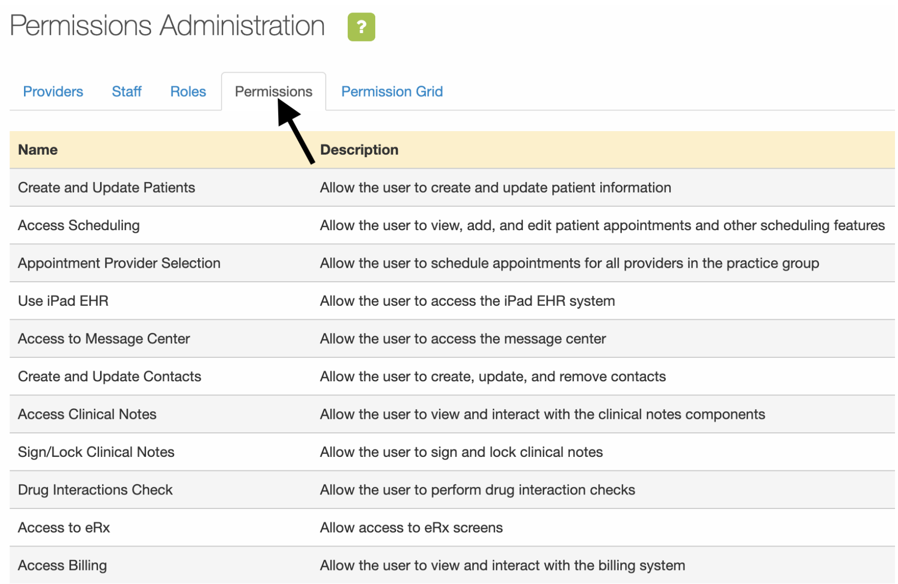
Staff and Provider Permissions

09/18/2024 10:44 am EDT

DrChrono has a variety of permissions that can grant or restrict access to different areas of the system.

Permissions can be found under **Account** > **Staff Permissions** > **Permissions** tab.


Permissions Administration

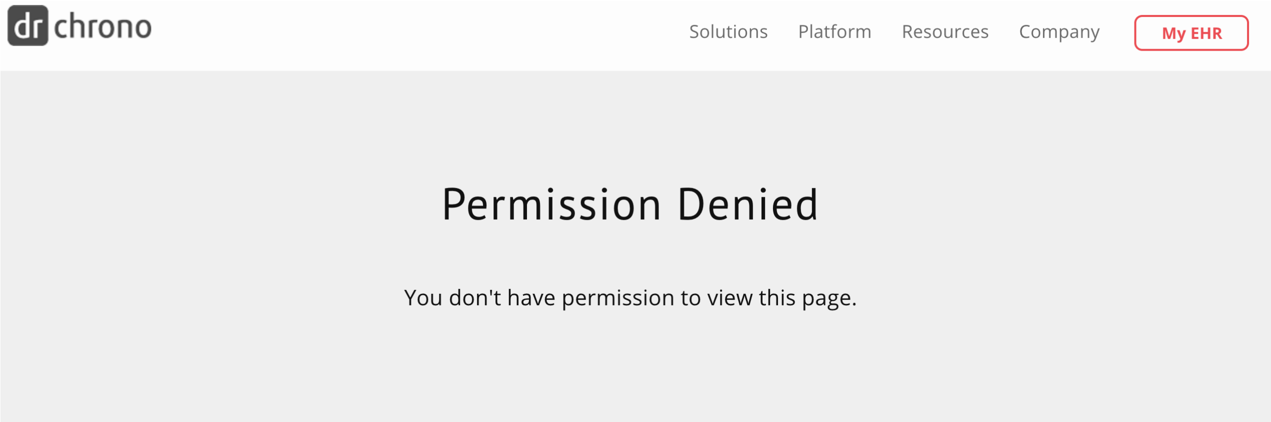
Providers | Staff | Roles | Permissions | Permission Grid

Name	Description
Create and Update Patients	Allow the user to create and update patient information
Access Scheduling	Allow the user to view, add, and edit patient appointments and other scheduling features
Appointment Provider Selection	Allow the user to schedule appointments for all providers in the practice group
Use iPad EHR	Allow the user to access the iPad EHR system
Access to Message Center	Allow the user to access the message center
Create and Update Contacts	Allow the user to create, update, and remove contacts
Access Clinical Notes	Allow the user to view and interact with the clinical notes components
Sign/Lock Clinical Notes	Allow the user to sign and lock clinical notes
Drug Interactions Check	Allow the user to perform drug interaction checks
Access to eRx	Allow access to eRx screens
Access Billing	Allow the user to view and interact with the billing system

This article describes the permissions. Click on a permission in the table below to jump to that specific permission.

Create and Update Patients	Access Scheduling	Appointment Provider Selection	Use iPad EHR	Access to Message Center
Create and Update Contacts	Access Clinical Notes	Sign/Lock Clinical Notes	Archived Signed Consent Forms	Drug Interactions Check
Access to eRx	Access Billing	Access Patient Payments	Access Patient Analytics	Provider Dropdown
View Practice Group	Share Patients	Access Reports	Settings	Export Patients
Manage Permissions	Manage Templates	Manage Accounts	Show Patient Balance	Show Billing Tab
Show Billing Summary	Add new referring sources	Access Institutional Billing	Access All Messages for Practice Group	Billing Administrator
Access Balance/Ledger	Access Patient Statements	Emergency Access	EHI Export	Break the Glass Review
SAML SSO Admin Dashboard	ePS Enrollment (Edit)	ePS Enrollment (Read Only)	Manage Form Tags	Disable Send to All Patients Option

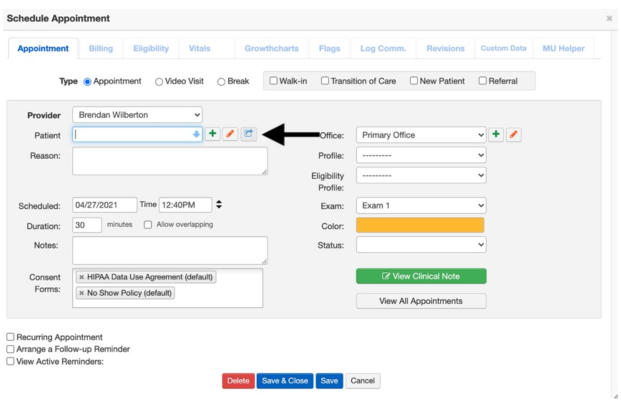
In most cases, when permission is not enabled for a user, they will receive a **Permission Denied** message when trying to access something they do not have permission to interact with.



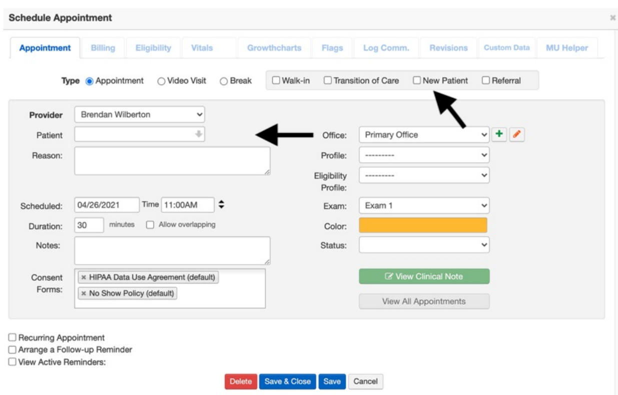
Create and Update Patients

When Enabled	When Disabled
Allows users to create patients and grant access to patient charts. Without this permission, users will not be able to access ANY patient charts or add patients in the appointment window.	A user that does not have this permission will not see the add new patient, edit patient or send OnPatient invite icons () in the appointment window. While the **New Patient** check box is visible, if a user, without this permission enabled, tries to add a patient, they will receive an error message. They will also receive a permission denied message if they try to click on a patient's name in the message center, nor will they be able to attach documents to a patient chart.

With create and update patients permission enabled



Without create and update patients permission enabled



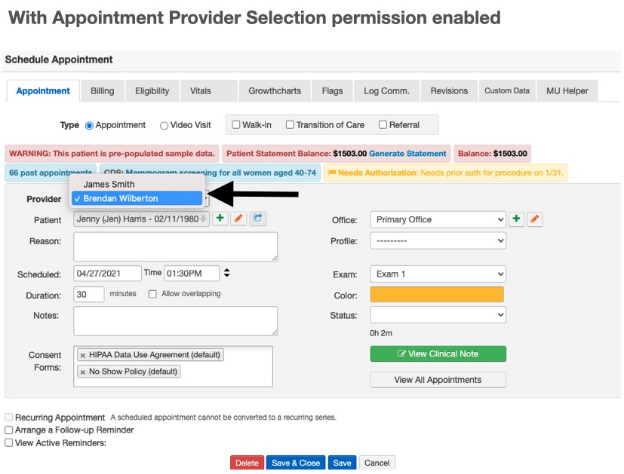
Access Scheduling

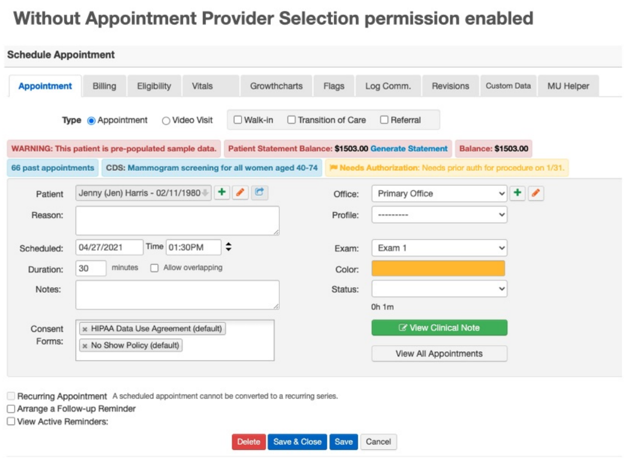
When Enabled	When Disabled

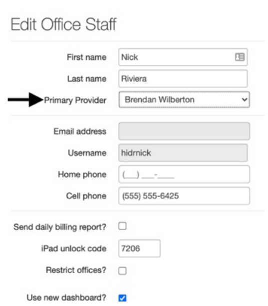
Allows users to access the schedule as well as view and schedule appointments.	If this permission is disabled for a user, they will not be able to see or access any appointments for the patient. Note: Staff accounts will need to land on the **Dashboard** screen when they log in. Otherwise, the user will not be able to access DrChrono after logging in because they are unable to access the schedule. To set this up, navigate to **Account** > **Account Settings** > **General** tab and make sure the **Use new dashboard home screen** is checked.

Appointment Provider Selection

When Enabled	When Disabled
Allows users to schedule for all providers in the practice group.	If this permission is disabled, the user will ONLY be able to schedule for the **Primary Provider** listed on their staff account settings.

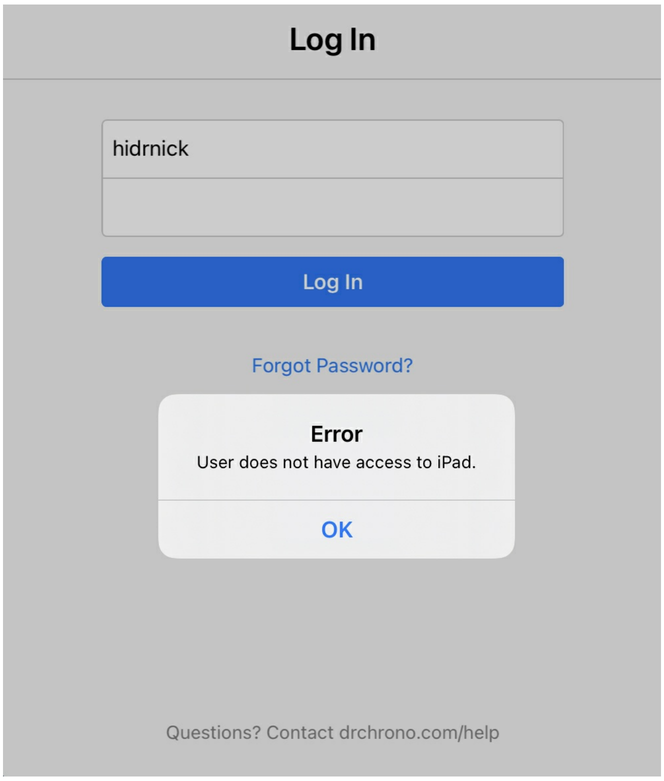






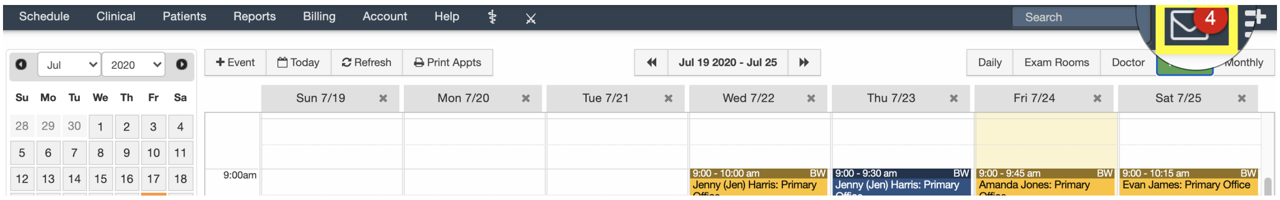
Use iPad EHR

When Enabled	When Disabled
Allows users to log in and use the EHR App for iPhone and iPad.	Without this permission enabled, users will receive an error message when attempting to log in to the app.



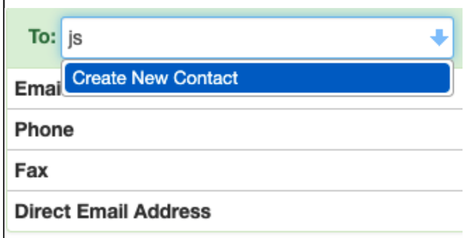
Access to Message Center

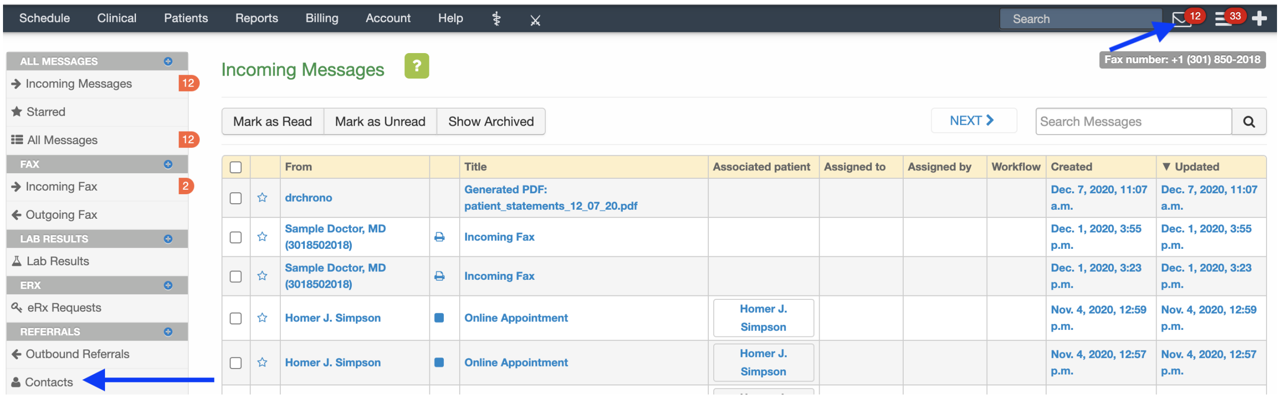
When Enabled	When Disabled
Grants the user access to the **Message Center** ( ) along with faxing/messaging capabilities from the patient chart and clinical note, allowing them to: • view messages • fax documents • send referrals	If this permission is disabled for the user, they will not be able to access the **Message Center** ( ) or complete any of the tasks mentioned in the **Enabled** description while in the message and/or the patient's chart.



Create and Update Contacts

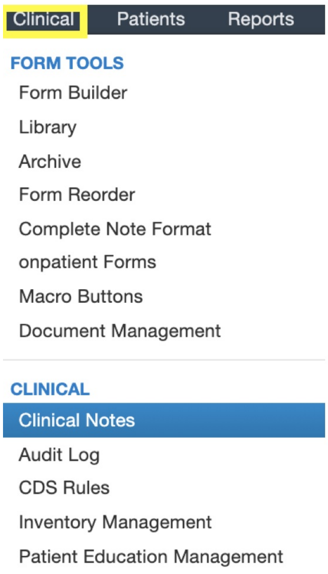
When Enabled	When Disabled

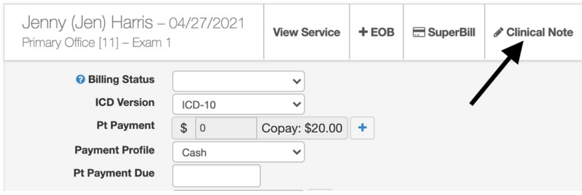
Allows the user to add contacts to the account in the **Message Center** ( ) > **Contacts** and the **Create New Contact** option when sending a referral. 	Users will not be able to access the **Contacts** section in the account and will receive a **Permission Denied** error message. The user is also unable to add contacts when sending a referral through the **Create New Contact** option. The window to enter contact information will not open for the user.

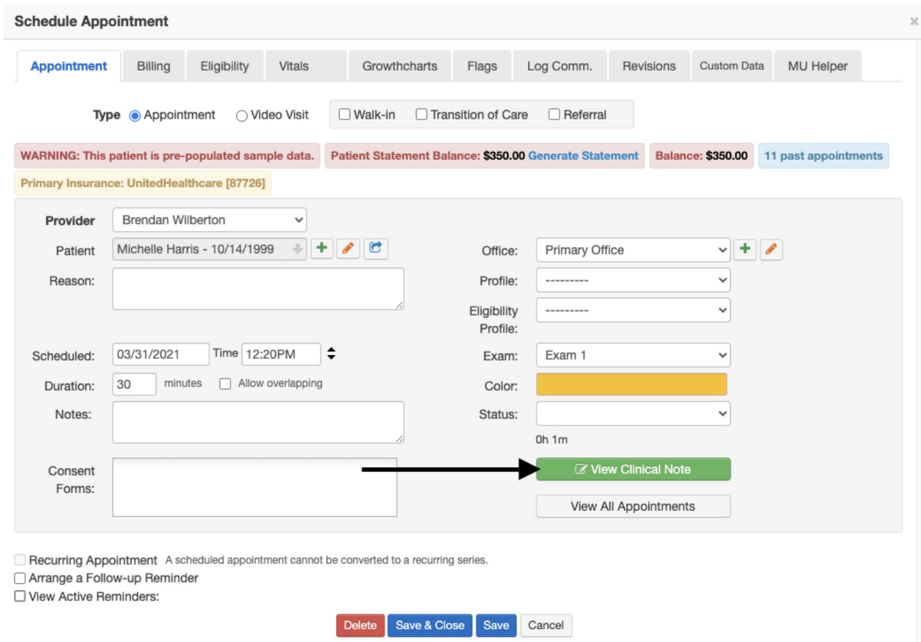


Access Clinical Notes

When Enabled	When Disabled
Allows the user to access and view clinical notes in various areas of DrChrono.	Users will receive a **Permission Denied** message when trying to view clinical notes in: • The appointment window (both on the schedule and in the patient's chart) • Clinical > Clinical Notes • Live Claims Feed



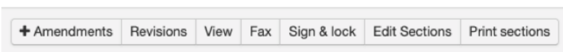




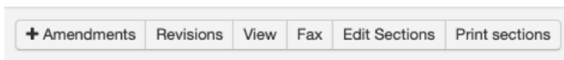
Sign/Lock Clinical Notes

When Enabled	When Disabled
Allows the user to sign and lock clinical notes. The **Sign & Lock** button will appear when the note is previewed. Note: If Sign/Lock Clinical Notes is enabled for a staff user, they are able to sign and lock clinical notes. However, ONLY the provider's name will appear on the note, not the user's.	The user will not have a **Sign & Lock** button available to them when they preview a note.

With Sign/Lock Clinical Notes Permission Enabled



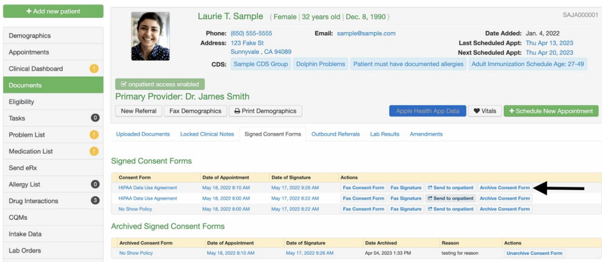
Without Sign/Lock Clinical Notes Permission Enabled



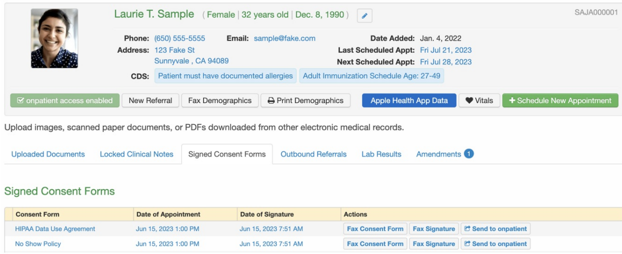
Archived Signed Consent Forms

When Enabled	When Disabled
Allows access to the user to archive signed consent forms. Archiving Signed Consent Forms	The user will not be able to archive signed consent forms.

With Archive Signed Consent Forms Enabled

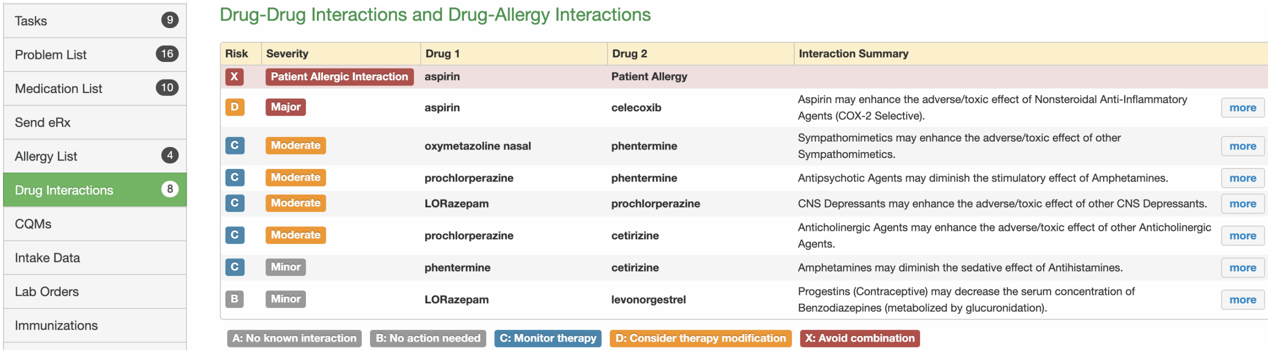


Without Archive Signed Consent Forms Enabled



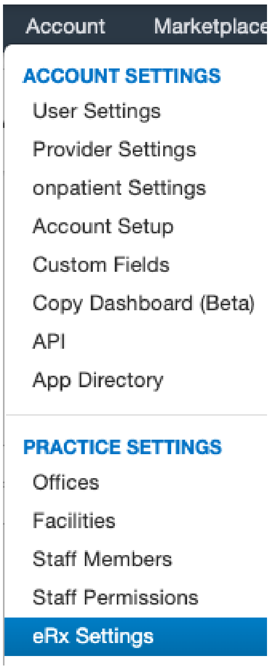
Drug Interactions Check

When Enabled	When Disabled
Allows access to the **Drug Interactions** section in the patient's chart or clinical note.	N/A



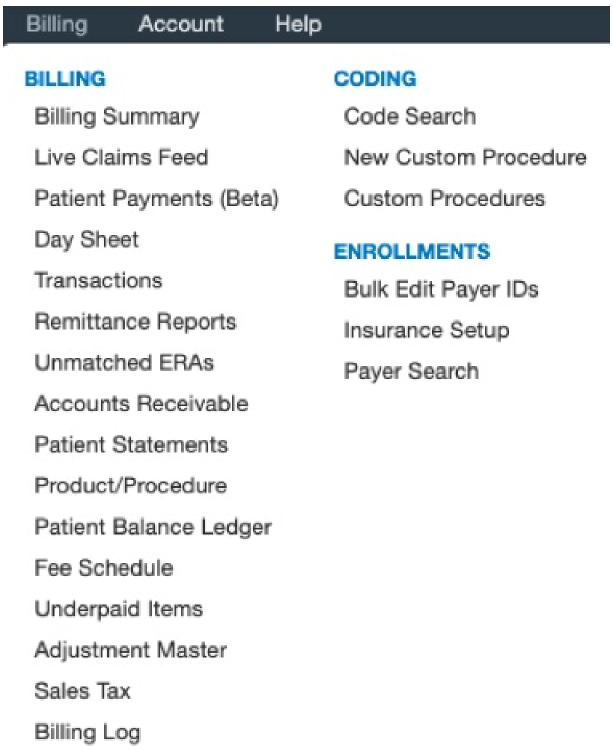
Access to eRx

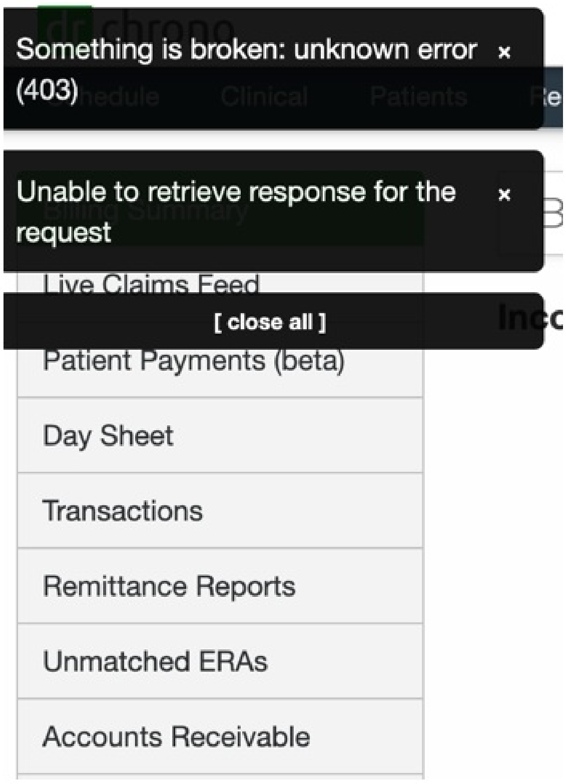
When Enabled	When Disabled
Allows access to the **Send eRx** function in the patient's chart. Grants the ability to prescribe medications. Note: If **Send eRx** is enabled for a staff user, they are able to send prescriptions. However, ONLY the provider's name will appear on the prescription, not the user's. This setting also provides access to the **eRx Settings** under the account menu.	Access to the **Send eRx** and **eRx Settings** feature is restricted, and a **Permission Denied** message will be displayed.



Access Billing

When Enabled	When Disabled
Allows access to billing information **Billing** menu.	Access to the **Billing** menu will result in error messages, and the options will not load. Users can still enter codes under the **Billing** tab in the appointment window and clinical notes.

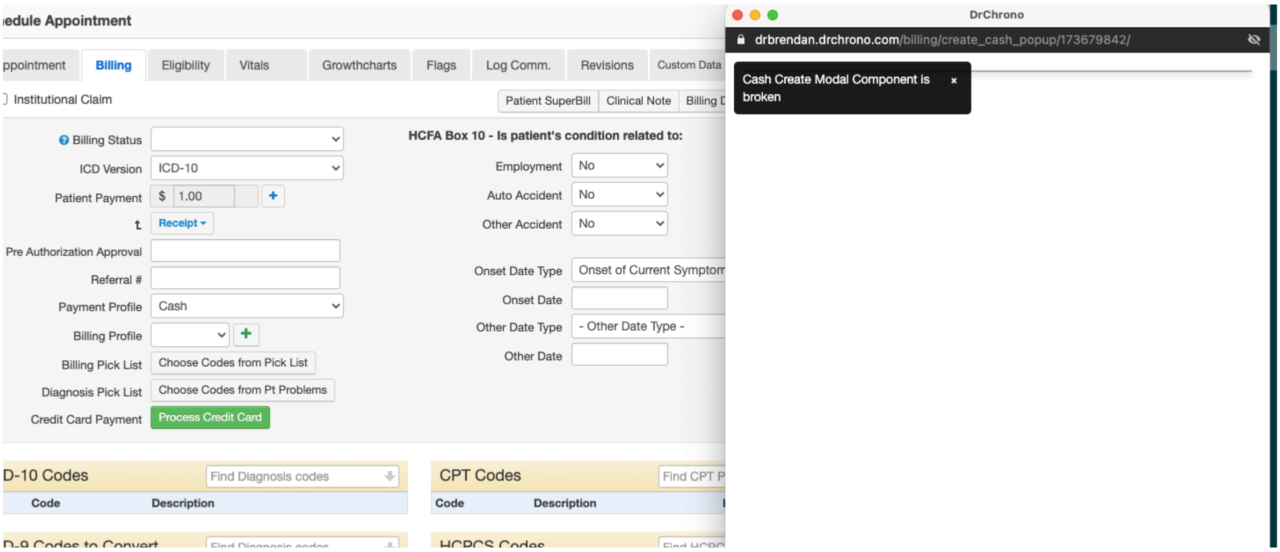




Access Patient Payments

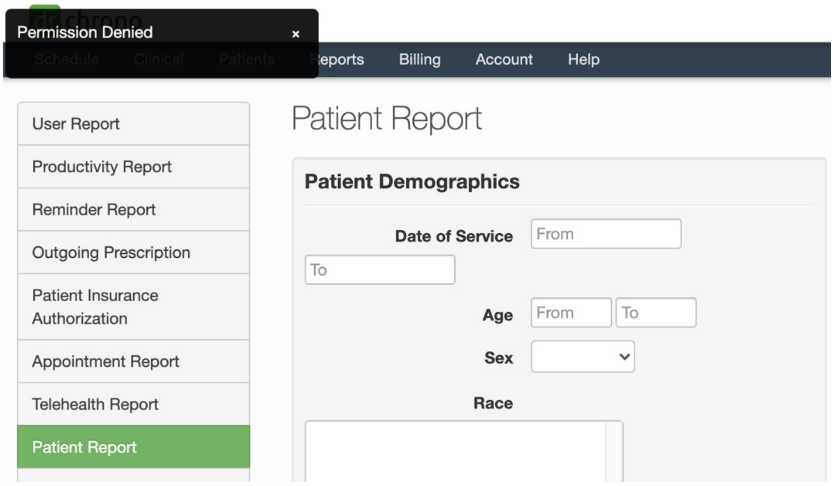
When Enabled	When Disabled

Allows the user to enter and process payments in the appointment window, patient's chart/patient payments, the Live Claims Feed, and the EHR app.	Access to **Patient Payments** is denied when both **Access Billing** and **Access Patient Payments** are BOTH disabled. Users will receive a **Permission Denied** message or an error that states **Cash Create Modal Component is Broken** (see below).



Access Patient Analytics

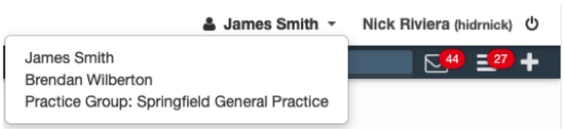
When Enabled	When Disabled
Allows the user to access the **Patient Report** under the **Reports** menu.	Access to the **Patient Report** under the **Reports** menu is restricted and a permission denied message is displayed.



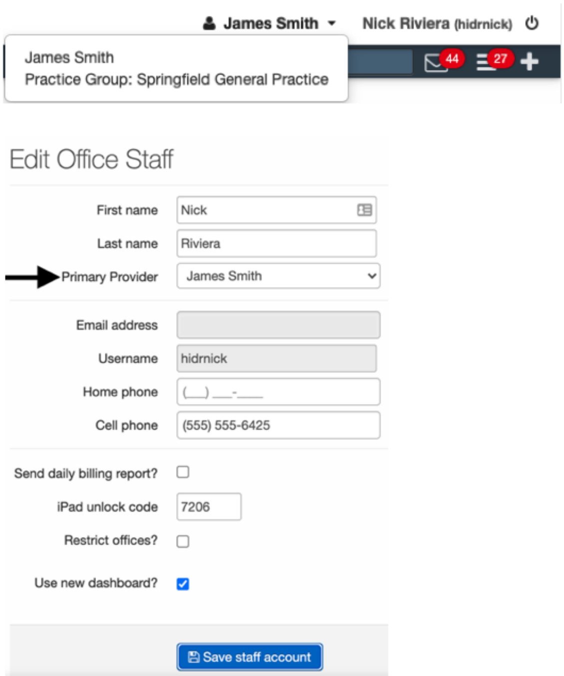
Provider Dropdown

When Enabled	When Disabled
Allows the user access to multiple providers in a practice group. The user can easily navigate between provider accounts with this permission enabled.	If this permission is disabled, the user will ONLY be able to access information for the **Primary Provider** listed on their staff account settings.

With Provider Dropdown Permission Enabled



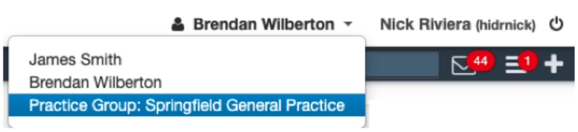
Without Provider Dropdown Permission Enabled



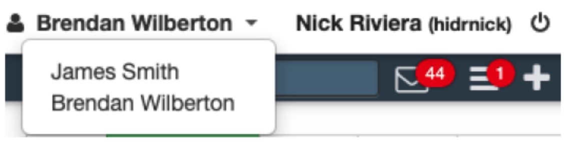
View Practice Group

When Enabled	When Disabled
The practice group dropdown allows you to view the collective information of the practice when the **Practice Group** option is selected. For more information on the practice group dropdown, see our article.	If this permission is disabled, you will only be able to see the information for the individual providers you have access to.

With View Practice Group Permission Enabled

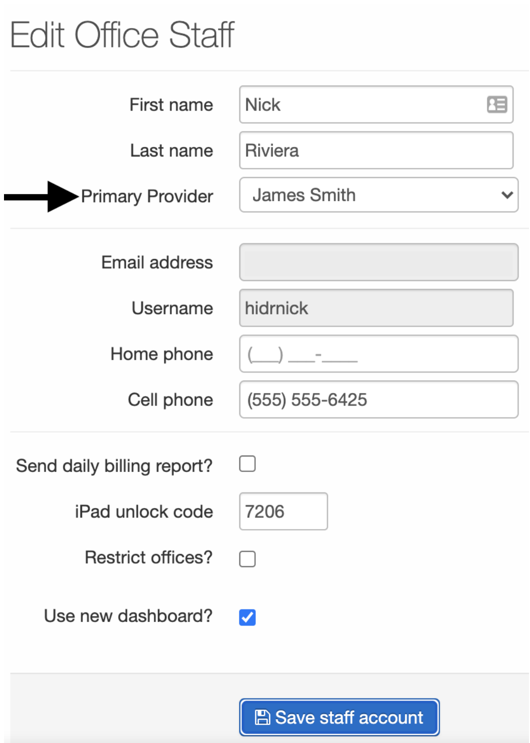


Without View Practice Group Permission Enabled



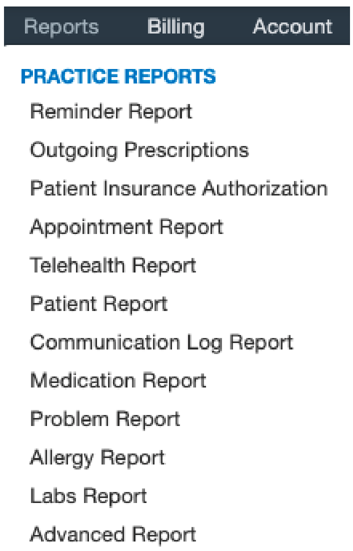
Share Patients

When Enabled	When Disabled
Share patients allows users to view and interact with patients in the practice group whose primary provider is different from the primary provider selected on their staff account settings.	Users can only view and interact with patients whose provider is the same as the primary provider selected in their staff account settings.



Access Reports

When Enabled	When Disabled
Allows users to access the **Practice Reports** under the **Reports** menu.	Restricts users from accessing the **Practice Reports** under the **Reports** menu. A permission denied message is displayed.



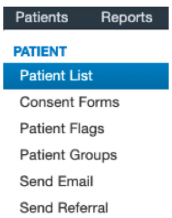
Settings

When Enabled	When Disabled

Allows access to the **Provider Settings** and **Offices** under **Practice Settings** under the **Account** menu in addition to **Patient Flags** under the **Patients** menu. Note: **eRx Settings** is controlled by the **Access to eRx** permission.	Does not allow users to access **Provider Settings** and **Offices** under **Practice Settings** under the **Account** menu. Restricts access to **Patient Flags** under the **Patients** menu.

Export Patients

When Enabled	When Disabled
Allows the user to export patient data in bulk in a CSV or bulk export C-CDA files under **Patients** > **Patients List.**	The user will not have access to the **Export (CSV)** or the **Export (C-CDA XML)** buttons under **Patients** > **Patients List.**

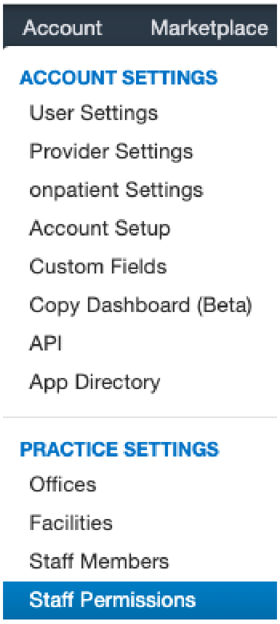


With Export Permission Enabled

Without Export Permission Enabled

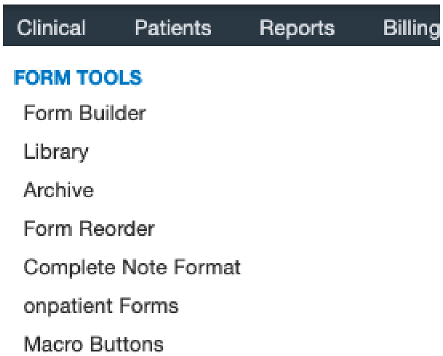
Manage Permissions

When Enabled	When Disabled
Allows the user to add or remove permissions to staff or provider accounts under **Account** > **Staff Permissions**.	The user will not have access to **Account** > **Staff Permissions** and will receive a permission denied message.



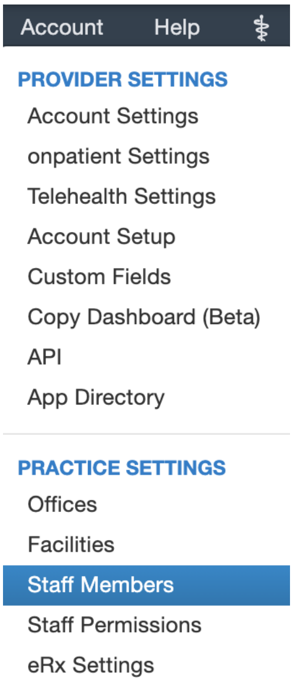
Manage Templates

When Enabled	When Disabled
Allows the user to access the **Form Tools** to create and edit clinical forms under the **Clinical** menu.	The user will not have access to any of the **Form Tools** and will receive a permission denied message.



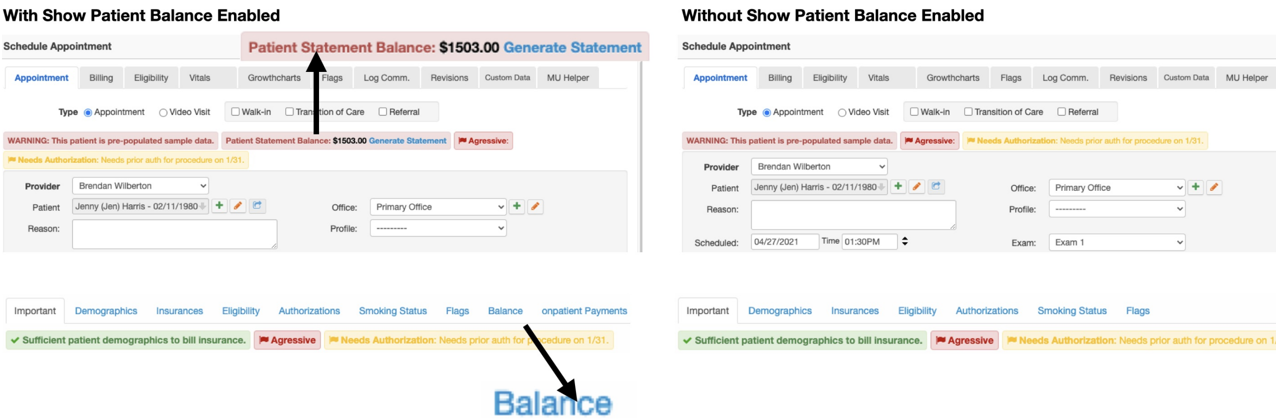
Manage Accounts

When Enabled	When Disabled
Allows the user access to **Account** > **Staff Members:** giving the user the ability to create, edit, and inactivate accounts for staff members.	The user will not have access to **Accounts** > **Staff Members** and will receive a permission denied message.



Show Patient Balance

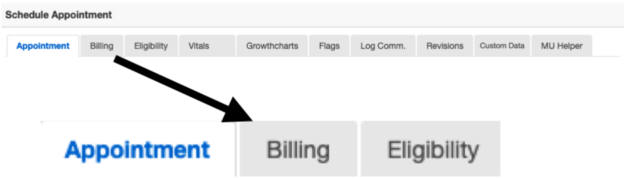
When Enabled	When Disabled
Displays the patient's balance in the appointment window and provides access to the **Balance** tab in the patient's chart.	The patient's balance in the appointment window and the **Balance** tab in the patient's chart will not be visible.



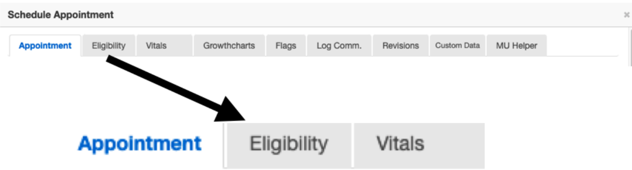
Show Billing Tab

When Enabled	When Disabled
Allows the user to access the **Billing** tab in the Appointment window and Clinical Note.	The user will not see the **Billing** tab in the Appointment window or Clinical Note.

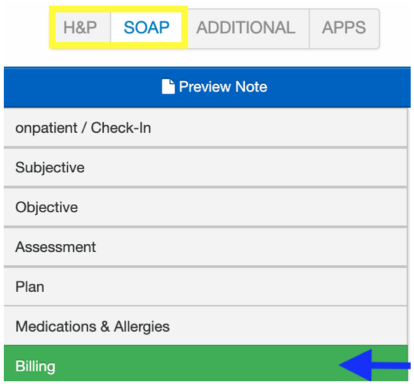
With Show Billing Tab Enabled In the Appointment Window



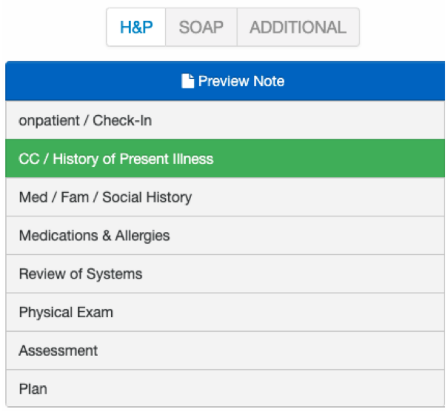
Without Show Billing Tab Enabled In the Appointment Window



With Show Billing Tab Enabled In the Clinical Note



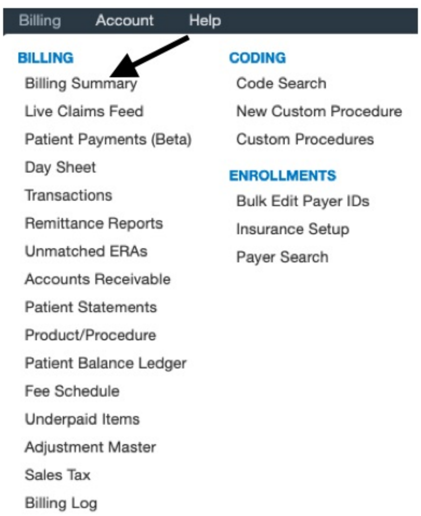
Without Show Billing Tab Enabled In the Clinical Note



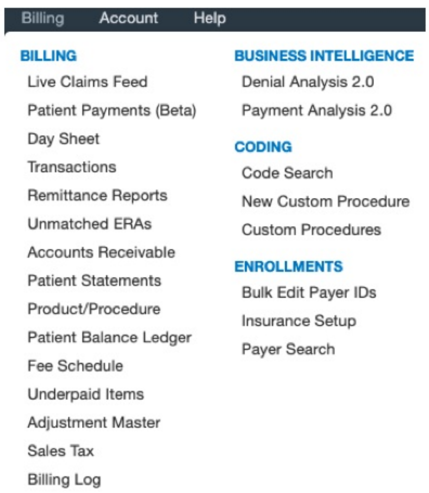
Show Billing Summary

When Enabled	When Disabled
Allows the user to access the **Billing Summary** report in the **Billing** menu.	The user will not see the **Billing Summary** report in the **Billing** menu.

With Show Billing Summary Permission Enabled

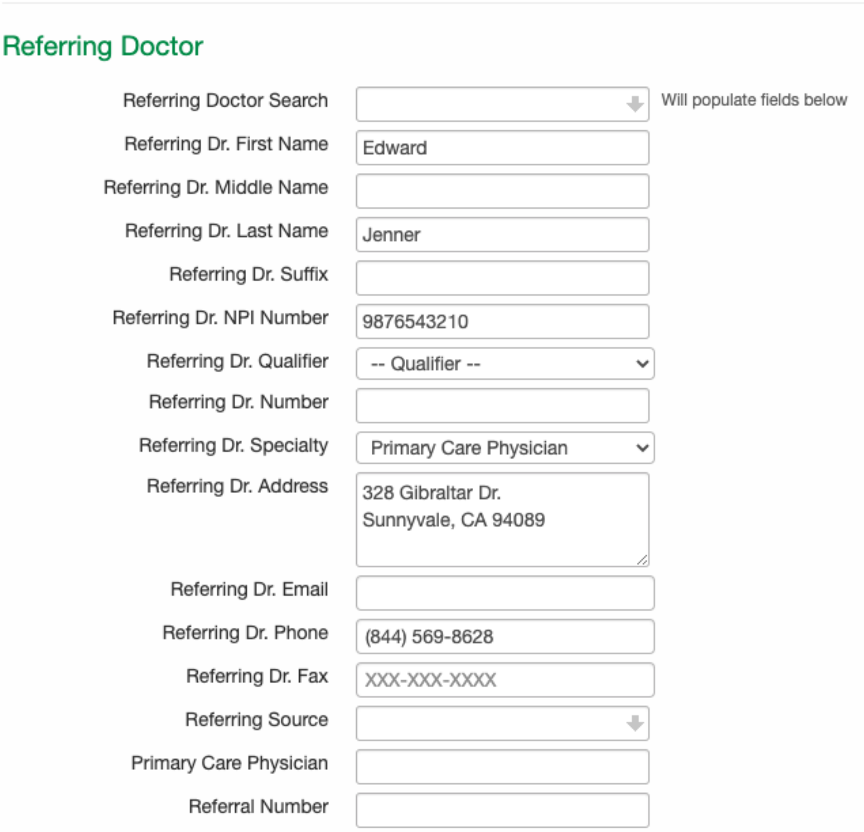


Without Show Billing Summary Permission Enabled



Add new referring sources

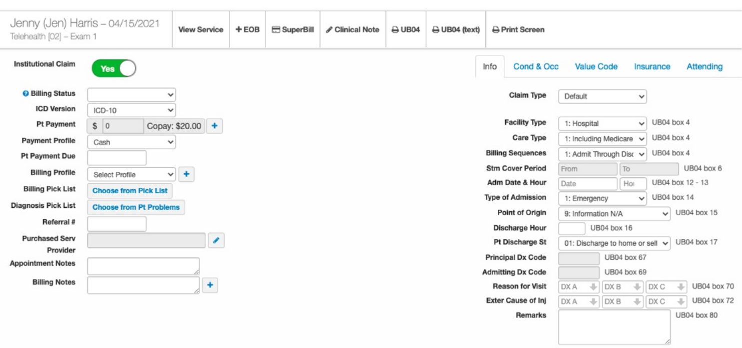
When Enabled	When Disabled
Allows the user to add referring/ordering provider information to a patient's chart.	N/A



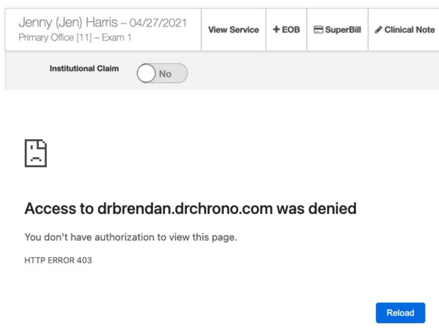
Access Institutional Billing

When Enabled	When Disabled
If your account has **Institutional Billing** enabled, this permission allows you to enter information for institutional UB04 forms.	The user is unable to enter information for UB04 forms. They will still see the switch for **Institutional Claims** on the Billing Details screen. However, if they try to activate the Institutional Claim switch, they will receive an **Access Denied** message.

With Access Institutional Billing Permission Enabled



Without Access Institutional Billing Permission Enabled

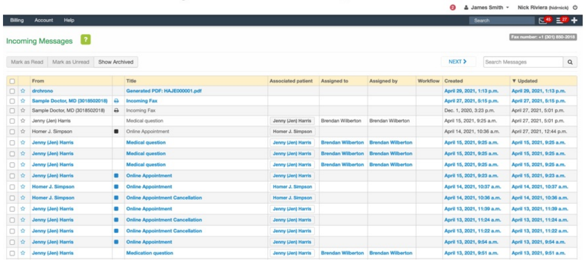


Access All Messages for Practice Group

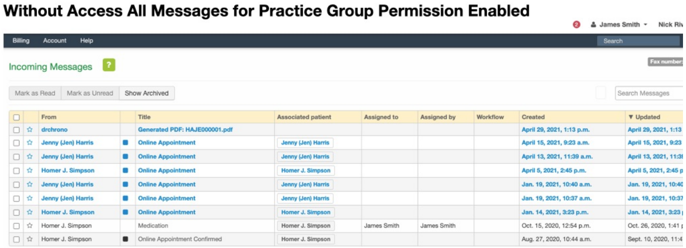
When Enabled	When Disabled

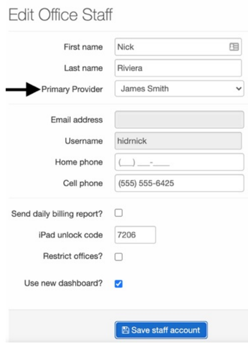
Allows users to view and interact with messages in the practice group whose primary provider is different from the primary provider selected on their staff account settings.	Users can only view and interact with messages whose provider is the same as the primary provider selected in their staff account settings.

With Access All Messages for Practice Group Permission Enabled

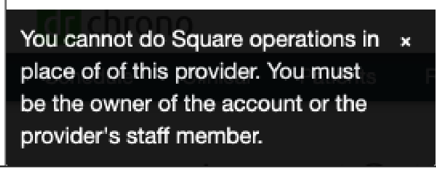


Without Access All Messages for Practice Group Permission Enabled

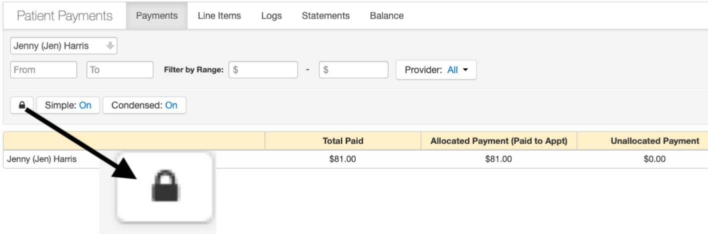




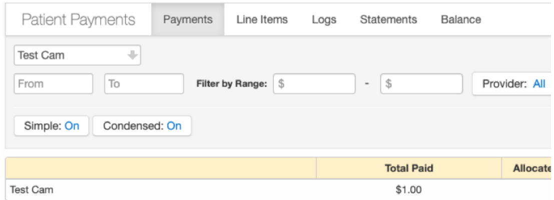
Billing Administrator

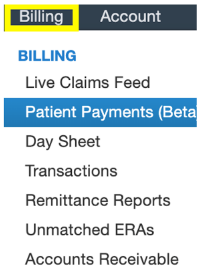
When Enabled	When Disabled
Allows the user to delete patient payments and unallocate line item payments in the **Patient Payments** section by selecting the lock icon (). Additionally, the Billing Administrator permission allows the user to access Square setup and settings under **Account** > **Account Settings** > **Patient Payments**.	The user will not have the ability to delete payments or unallocate line item payments. The lock icon () will not appear on their screen when they are in the **Patient Payments** menu. Users will be unable to complete any Square functions under **Account** > **Account Settings** > **Patient Payments**. They will receive an error message. 

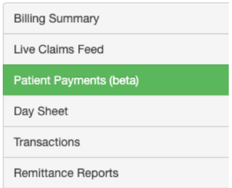
With Billing Administrator Permission Enabled



Without Billing Administrator Permission Enabled

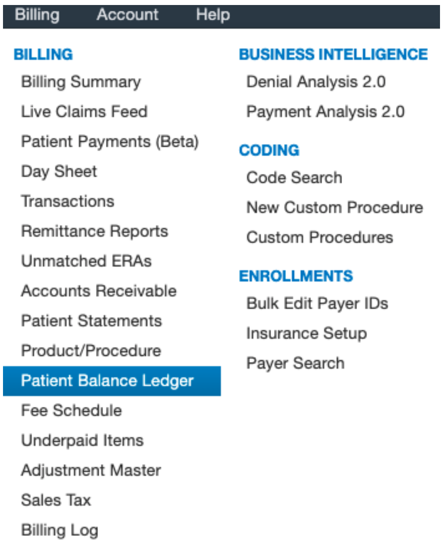






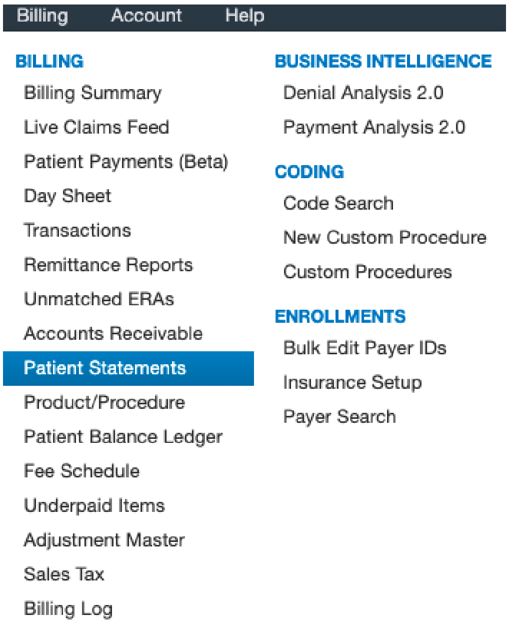
Access Balance/Ledger

When Enabled	When Disabled
Allows the user to access the **Patient Balance Ledger** report under the **Billing** menu.	N/A



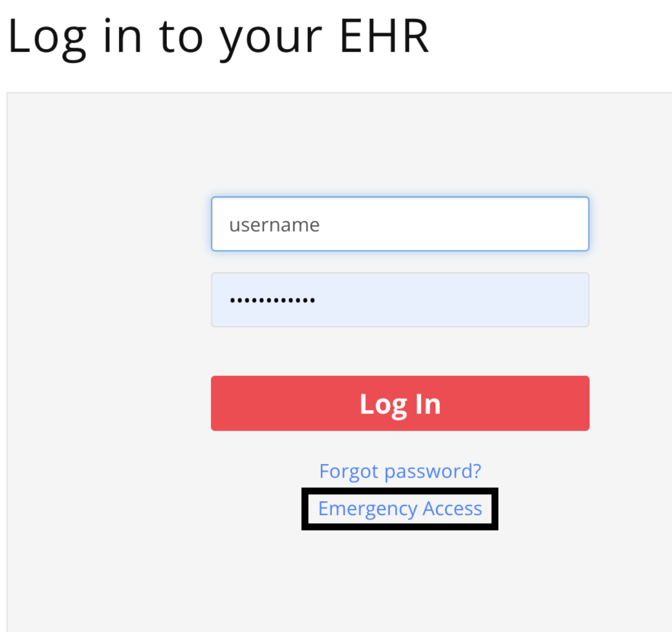
Access Patient Statements

When Enabled	When Disabled
Allows the user to access the **Patient Statements** section under the **Billing** menu.	N/A



Emergency Access

When Enabled	When Disabled
Allow the user to temporarily request emergency access to Create and Update Patients, Access Scheduling, and Access Clinical Notes system permissions.	The user would not be able to request emergency access. Permission denied.



Break the Glass Review

*Please note this permission is part of a larger feature enhancement that is not yet available to users. We will have more information in the future about how to use this permission and best practices once it's made available.

When Enabled	When Disabled

Allows the user to review and approve Break the Glass Requests.	The user would not be able to view or approve Break the Glass Requests.

"EHR 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 situation, similar to breaking the glass to access a fire extinguisher in case of fire. In the context of EHR systems, it means that 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.

SAML SSO Admin Dashboard

When Enabled	When Disabled
Allows the user to view the SAML SSO Dashboard to review and approve SSO Requests.	The user would not be able to view the SAML SSO Dashboard to review and approve SSO requests.

ePS Enrollment (Edit)

When Enabled	When Disabled
The user can access Billing > Enrollment to see, modify, submit, and/or delete EDI, ERA, and RTE, requests with ePS.	The user cannot access Billing > Enrollment to see, modify, submit, and/or delete EDI, ERA, and RTE requests with ePS.

ePS Enrollment (Read Only)

When Enabled	When Disabled
The user can access Billing > Enrollment to see EDI, ERA, and RTE requests with ePS and their current status, but cannot make any changes or updates.	The user cannot access Billing > Enrollment to see EDI, ERA, and RTE requests with ePS and their current statuses.