

Account Permissions Overview

Last modified on 06/11/2025 4:47 pm EDT

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

DrChrono has permissions that can grant or restrict access to different areas of the system. Permissions and their descriptions are listed on the **Permissions Administration** page (**Account > Staff Permissions > Permissions** tab).

When the permission is 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
Staff can view and manage messages for multiple providers in the practice group.	Staff can only view and manage messages for their associated primary provider selected on the Edit Office Staff page (Account > Staff Members > Staff tab > select Edit > Primary Provider dropdown).

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 NotesLive Claims Feed

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: ICD-10
Pt Payment: \$ 0 Copay: \$20.00
Payment Profile: Cash
Pt Payment Due:

Schedule Appointment

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

Type: Appointment
Video Visit
Walk-in
Transition of Care
Referral

WARNING: This patient is pre-populated sample data.
Patient Statement Balance: \$350.00
Generate Statement
Balance: \$350.00
11 past appointments

Primary Insurance: UnitedHealthcare [87726]

Provider: Brendan Wilberton
Patient: Michelle Harris - 10/14/1999
Reason:

Office: Primary Office
Profile:
Eligibility Profile:
Exam: Exam 1
Color:
Status:

Scheduled: 03/31/2021 Time 12:20PM
Duration: 30 minutes
Allow overlapping
Notes:
Consent Forms:

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 [32] - Exam 1

View Service
+ EOB
SuperBill
Clinical Note
UB04
UB04 box
Print Screen

Institutional Claim: ☒ Yes

Billing Status:
ICD Version: ICD-10
Pt Payment: \$ 0 Copay: \$20.00
Payment Profile: Cash
Pt Payment Due:

Billing Profile:
Billing Pick List:
Diagnosis Pick List:
Referral #:
Purchased Serv:
Provider:
Appointment Notes:
Billing Notes:

Info
Cond & Occ
Value Code
Insurance
Attending

Claim Type: Default

Facility Type: 1: Hospital UB04 box 4

Care Type: 1: Including Medicare UB04 box 4

Billing Sequences: 1: Admit Through Dis UB04 box 4

Stm Cover Period: From To UB04 box 6

Adm Date & Hour: Date Hrs UB04 box 12 - 13

Type of Admission: 1: Emergency UB04 box 14

Point of Origin: Information N/A UB04 box 15

Discharge Hour: UB04 box 16

Pt Discharge St: G1: Discharge to home or self UB04 box 17

Principal Dx Code: UB04 box 67

Admitting Dx Code: UB04 box 69

Reason for Visit: DX A DX B DX C UB04 box 70

Enter Cause of Inj: DX A DX B DX C DX D UB04 box 72

Remarks: UB04 box 80

Without Access Institutional Billing Permission Enabled

Jenny (Jen) Harris - 04/27/2021
Primary Office [11] - Exam 1

View Service
+ EOB
SuperBill
Clinical Note

Institutional Claim: ☐ 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
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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.	<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>

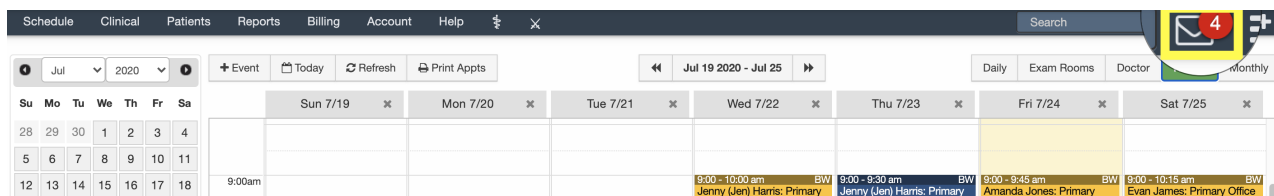
Access to eRx

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
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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>



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

Referring Dr. Middle Name

Referring Dr. Last Name

Referring Dr. Suffix

Referring Dr. NPI Number

Referring Dr. Qualifier

Referring Dr. Number

Referring Dr. Specialty

Referring Dr. Address

Referring Dr. Email

Referring Dr. Phone

Referring Dr. Fax

Referring Source

Primary Care Physician

Referral Number

Appointment Provider Selection

Turned On	Turned Off
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Turned On

Staff can schedule appointments for all providers in the practice group.

Turned Off

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).

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 PM Needs Authorization: Needs prior auth for procedure on 1/31.

James Smith

Provider: **Brendan Wilberton**

Patient: Jenny (Lien) Harris - 02/11/1980

Reason:

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

Duration: 30 minutes Allow overlapping

Notes:

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

Office: Primary Office

Profile:

Exam: Exam 1

Color:

Status:

0h 2m

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

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 PM Needs Authorization: Needs prior auth for procedure on 1/31.

Jenny (Lien) Harris - 02/11/1980

Reason:

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

Duration: 30 minutes Allow overlapping

Notes:

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

Office: Primary Office

Profile:

Exam: Exam 1

Color:

Status:

0h 1m

View Clinical Note

View All Appointments

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

Arrange a Follow-up Reminder

View Active Reminders:

Delete Save & Close Save Cancel

Edit Office Staff

First name: Nick

Last name: Riviera

Primary Provider: **Brendan Wilberton**

Email address:

Username: hidmick

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. [Archiving Signed Consent Forms](#)

Turned Off


Can't archive signed consent forms.

Billing Administrator

Turned On

- 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.

Turned Off

- 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.

With Billing Administrator Permission Enabled


Patient Payments Payments Line Items Logs Statements Balance

Jenny (Jen) Harris

From To Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment
Jenny (Jen) Harris	\$81.00	\$81.00	\$0.00



Without Billing Administrator Permission Enabled

Patient Payments Payments Line Items Logs Statements Balance

Test Cam

From To Filter by Range: \$ - \$ Provider: All

Simple: On Condensed: On

	Total Paid	Allocated Payment (Paid to Appt)	Unallocated Payment
Test Cam	\$1.00		

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

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.

Bulk Patient EHI Export

Turned On	Turned Off
Export data for all patients in the practice or for one patient. Creating a New Request: EHI Export	Can't export data for all patients in the practice or for one patient.

Configure Decision Support Intervention

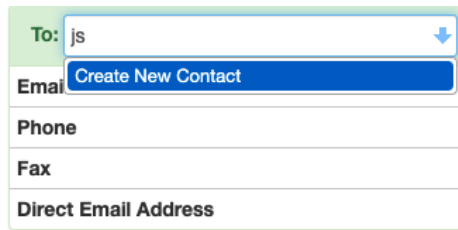
Turned On	Turned Off
View, create, edit, or deactivate decision support intervention (DSI) rules.	Can't view, create, edit, or deactivate DSI rules.

Create and Update Contacts

Turned On	Turned Off
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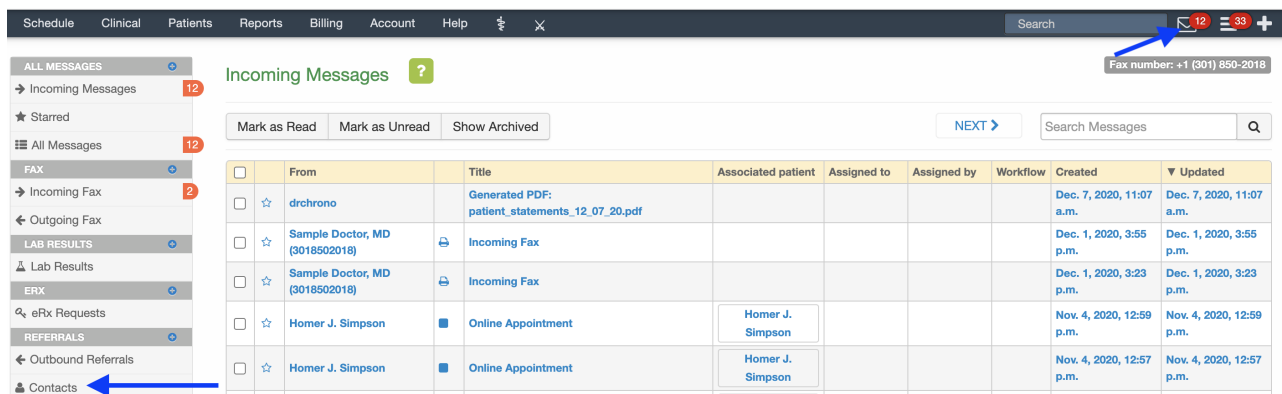
Turned On

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



Turned Off

- 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

Create patients and grant access to patient charts.

Turned Off

- Can't access patient charts or add patients to appointments.
- Can't see the **Add a New Patient**, **Edit Patient**, or **Invite to OnPatient** icons  in the **Schedule Appointment** window.
- The **New Patient** checkbox appears, but if you try to add a patient, you receive an error message.
- If you try to select a patient's name in the **Message Center**, you receive a "permission denied" message.
- Can't attach documents to a patient chart.

With create and update patients permission enabled

Schedule Appointment

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

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

Provider: Brendan Wilberton

Patient: [Dropdown] **←**

Reason: [Text Field]

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

Duration: 30 minutes ☐ Allow overlapping

Notes: [Text Field]

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

☒ View Clinical Note

View All Appointments

☐ Recurring Appointment
☐ Arrange a Follow-up Reminder
☐ View Active Reminders:

Delete Save & Close Save Cancel

Without create and update patients permission enabled

Schedule Appointment

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

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

Provider: Brendan Wilberton

Patient: [Disabled Dropdown]

Reason: [Text Field]

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

Duration: 30 minutes ☐ Allow overlapping

Notes: [Text Field]

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

☒ View Clinical Note

View All Appointments

☐ Recurring Appointment
☐ Arrange a Follow-up Reminder
☐ View Active Reminders:

Delete Save & Close Save Cancel

Disable Send to All Patients Option

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
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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, 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 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.

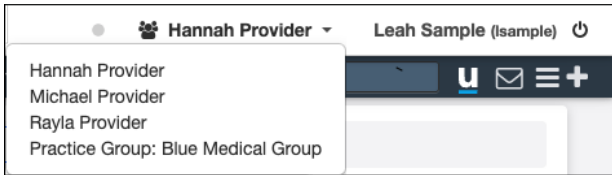
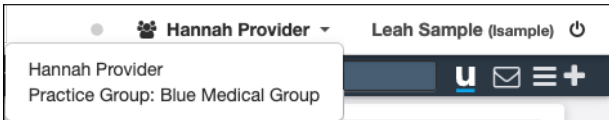
Practice Patient Chart Header Settings

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

Turned On	Turned Off
Can access multiple providers in a practice group. 	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). 

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
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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

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 on the Edit Office Staff page (Account > Staff Members > Staff tab > select Edit > Primary Provider dropdown).

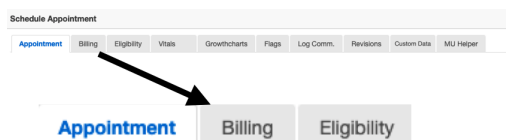
Show Billing Summary

Turned On	Turned Off
Access Billing > Billing Summary .	No access to Billing > Billing Summary .

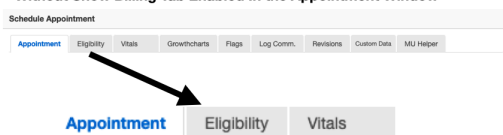
Show Billing Tab

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.

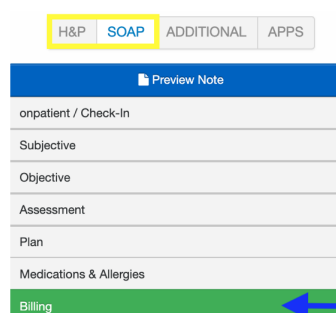
With Show Billing Tab Enabled In the Appointment Window



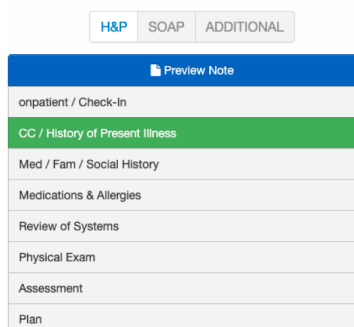
Without Show Billing Tab Enabled In the Appointment Window



With Show Billing Tab Enabled In the Clinical Note



Without Show Billing Tab Enabled In the Clinical Note



Show Patient Balance

Turned On	Turned Off
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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.

With Show Patient Balance Enabled

Screenshot of the patient appointment form with 'Show Patient Balance' enabled. The 'Patient Statement Balance: \$1503.00' is displayed in red at the top. A blue arrow points to the 'Balance' tab in the bottom navigation bar.

Without Show Patient Balance Enabled

Screenshot of the patient appointment form with 'Show Patient Balance' disabled. The balance information is not visible, and the 'Balance' tab is missing from the bottom navigation bar.

Sign/Lock Clinical Notes

Turned On	Turned Off
<p>Sign and lock clinical notes. The Sign & Lock button appears when the note is previewed.</p> <p>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.</p>	<p>No Sign & Lock button when you preview a note.</p>

With Sign/Lock Clinical Notes Permission Enabled

Screenshot of the clinical notes toolbar with the 'Sign & lock' button visible.

Without Sign/Lock Clinical Notes Permission Enabled

Screenshot of the clinical notes toolbar with the 'Sign & lock' button missing.

Single Patient EHI Export

Turned On	Turned Off
<p>Export data for a single patient.</p> <p>Creating a New Request: EHI Export</p>	<p>Can't export data for a single patient.</p>

Use iPad EHR

Turned On	Turned Off
<p>Log in and use the DrChrono EHR app for iPhone and iPad.</p>	<p>The DrChrono EHR app shows an error when you attempt to log in to the app.</p> <p>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.</p>

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
<p>View the collective information for all providers in the practice.</p>	<p>Can only see the information for the individual providers you have access to.</p>
<div><div><div><div><div></div><div>Hannah Provider</div></div><div><div>Hannah Provider</div><div>Michael Provider</div><div>Rayla Provider</div><div>Practice Group: Blue Medical Group</div></div></div><div><div>Leah Sample (lsample)</div><div><div>u</div><div>✉</div><div>☰</div><div>+</div></div></div></div></div>	<div><div><div><div><div></div><div>Hannah Provider</div></div><div><div>Hannah Provider</div></div></div><div><div>Leah Sample (lsample)</div><div><div>u</div><div>✉</div><div>☰</div><div>+</div></div></div></div></div>