

Edit Custom Roles

Last modified on 06/16/2026 7:56 pm EDT

Edit a custom role

1. Select **Account > Practice Management > General Management > Roles & Permissions**.
2. Select **Edit** for the specific role to open the **Edit Role** drawer.

Roles & Permissions					
		Permission Details	Permission Grid	...	Add Role
Role	Description	Created By	Actions		
Office Manager	Office/Practice Manager manages the office and other staff/provider accounts	System	View		
Provider	Provider that has access to the entire system	System	View		
Nurse	Nurse / PA that requires supervising signature	System	View		
Staff	Staff that has access to fundamental system tasks.	System	View		
Billing Staff	Staff which requires access to only billing information.	System	View		
IT Admin	Technical staff who needs access to the entire system	Anna Admin	Edit	Delete	
Showing 6 of 6 records		< < Prev Next > >			

3. Edit the permissions and select **Save Changes**.



Permissions are organized by category, and you can enable or disable them individually or by group.

Edit Role
✕

Role *

Description

Permission

All ▾

Appointment scheduling

Disable All

Access Scheduling	Allow the user to view, add, and edit patient appointments and other scheduling features	<input checked="" type="checkbox"/>
Appointment Provider Selection	Allow the user to schedule appointments for all providers in the practice group	<input checked="" type="checkbox"/>

Patient

Enable All

Export Patients	Allow the user to use patient export tools	<input type="checkbox"/>
Create and Update Patients	Allow the user to create and update patient information	<input checked="" type="checkbox"/>
Drug Interactions Check	Allow the user to perform drug interaction checks	<input type="checkbox"/>
Access to eRx	Allow access to eRx screens	<input type="checkbox"/>
Share Patients	Allow access to all patients in a practice group	<input type="checkbox"/>

Cancel
Save Changes