Manage Roles in Permissions Administration

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Your practice can have staff members with different levels of permissions. Use roles to customize which staff members have access to different permissions.

When modifying permissions and settings, the system follows a hierarchical order.

- The system initially looks for any user-level settings to show
- If there's no user setting, the system looks for any role-level settings
- If there's no role-level setting, the system looks for any practice-level setting
- If there's no practice-level setting, the system shows the DrChrono default settings

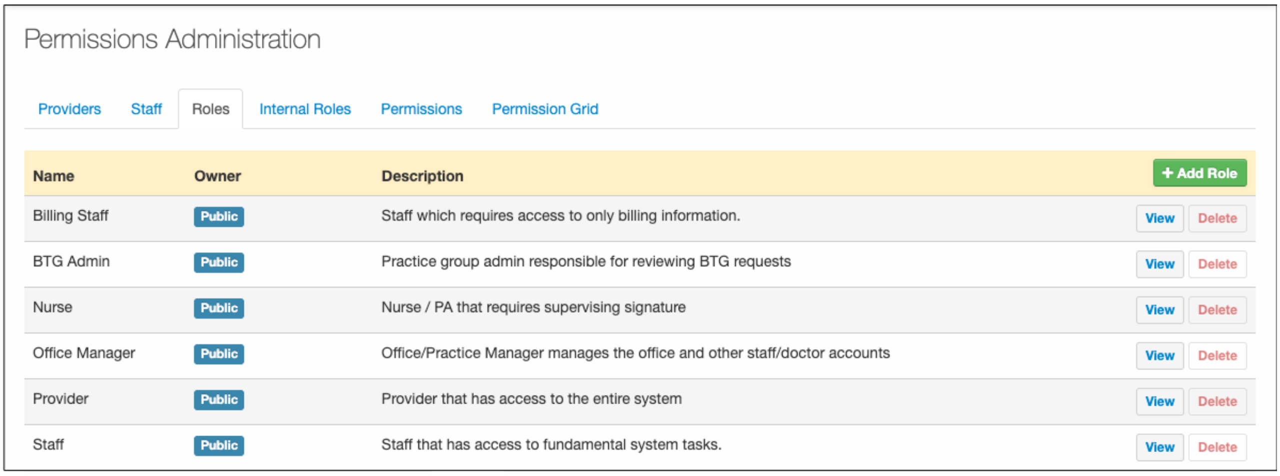
Public roles

Public roles are the DrChrono system roles.

- Select **Account** > **Staff Permissions** > **Roles** tab to view the six public roles.

Public Role	Description
Billing Staff	Staff who require access to only billing information
BTG Admin	This is future functionality and not live
Nurse	A nurse or physician assistant (PA) who requires a supervising signature
Office Manager	An office or practice manager who manages the office and other staff/doctor accounts
Provider	A provider who has access to the entire system
Staff	Staff who have access to fundamental system tasks.

- Select **View** to see the role's permissions.
- You cannot edit or delete public roles.



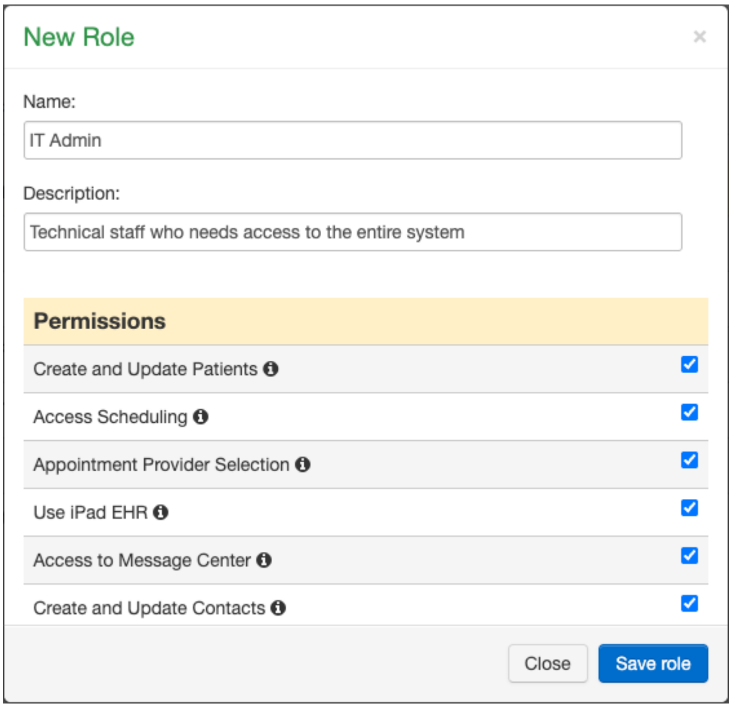
Custom roles

- When you modify permissions at the user level, the user's role changes from public to custom. See Edit a staff member's role from public to custom.
- You can revert a staff member's role from custom to public.
- The best practice is to create a new role on the **Roles** tab to customize permissions and assign staff members

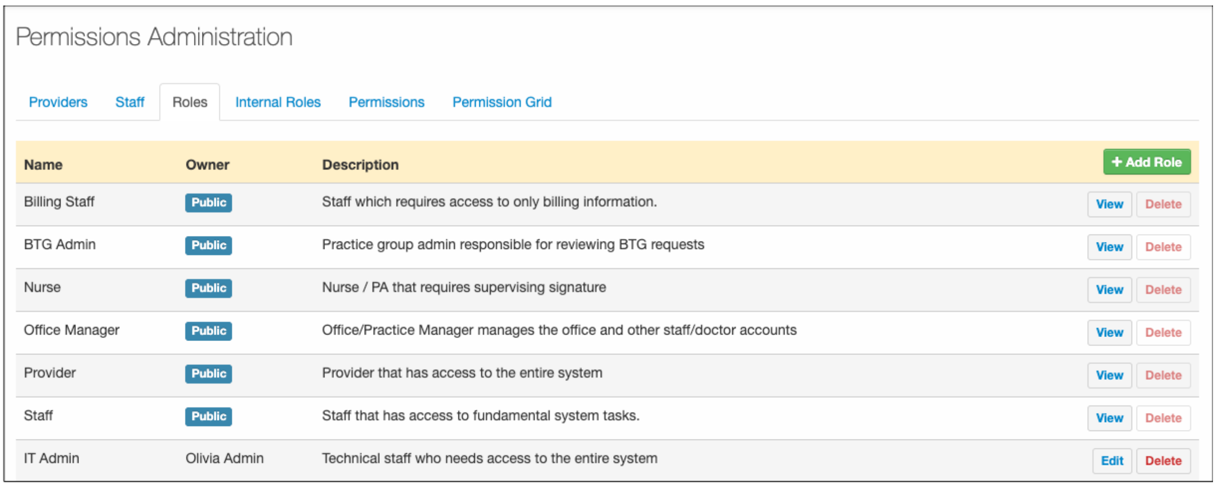
(as a group) to a specific role to prevent possible workflow disruptions.

Create a new custom role

1. Select **Account** > **Staff Permissions** > **Roles** tab.
2. Select **Add Role**.
3. Enter the name and description of your new role.
4. Select the permissions and then select **Save Role**.



Your new role appears at the bottom of the role list. Unlike public roles, you can edit and delete the custom roles you've created.



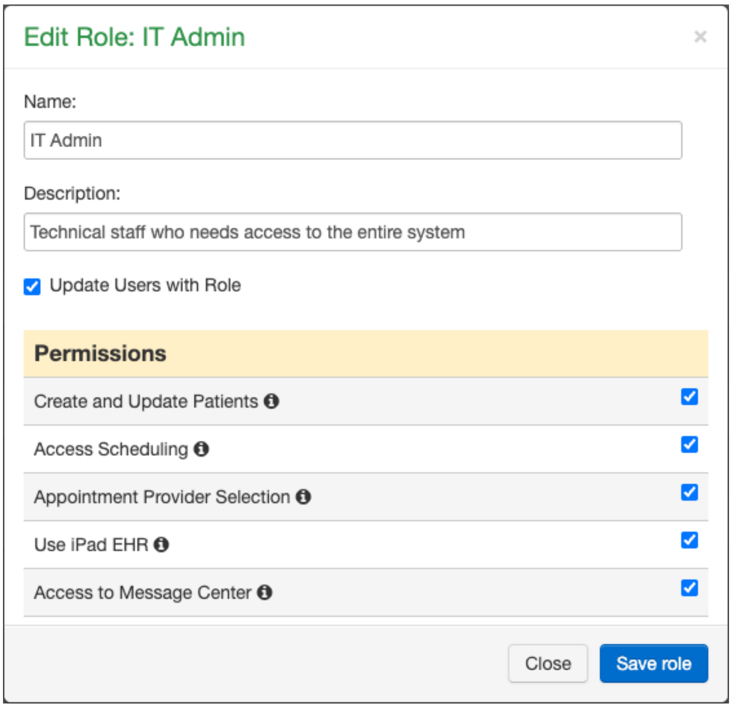
Edit custom roles

1. Select **Account** > **Staff Permissions** > **Roles** tab.

2. Select **Edit**.

3. **(Optional)** To update the permissions for all users with this role, select the **Update Users with Role** checkbox.

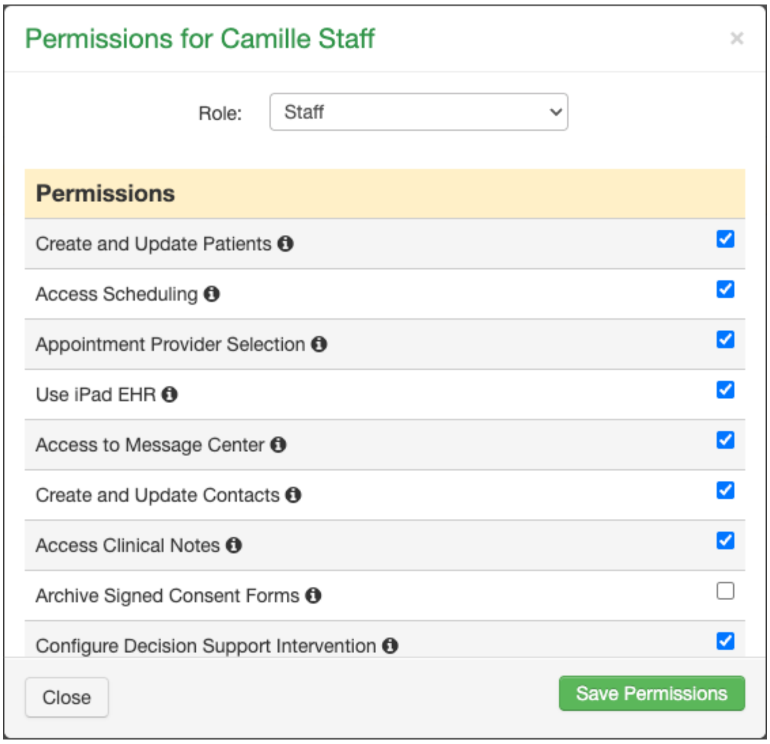
4. Edit the permissions and then select **Save role**.



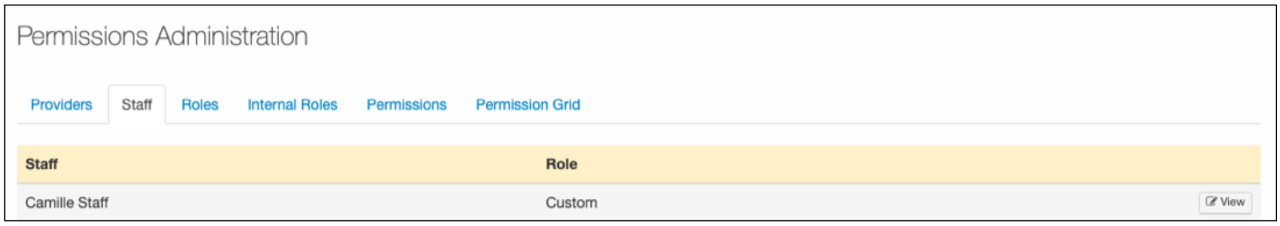
Manage public and custom roles

Edit a staff member's role from public to custom

From the permissions window, edit the permissions and then select **Save Permissions**. In this example, we selected the **Access to Message Center** checkbox.

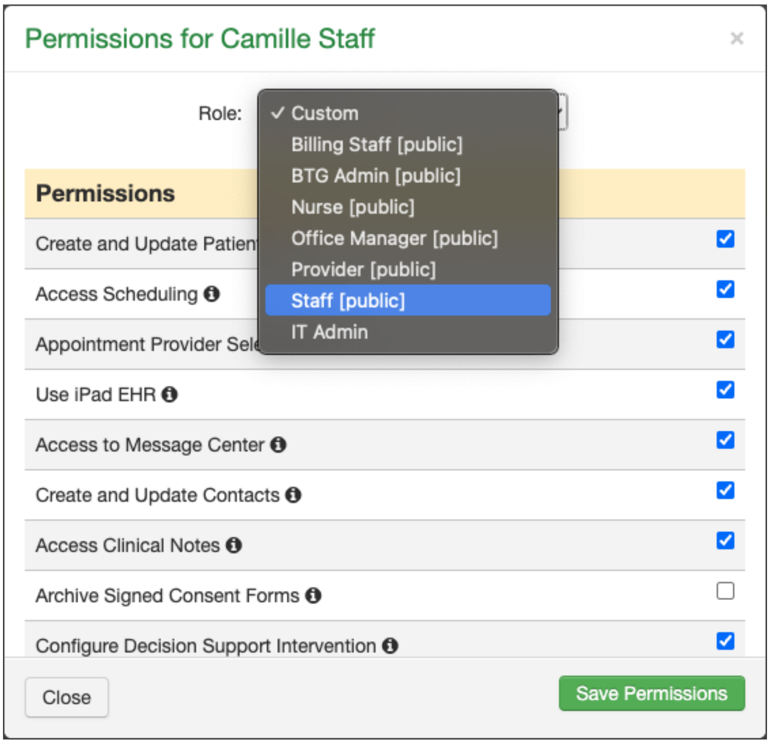


The role changes from public to custom.



Revert a staff member's role from custom to public

In the permissions window, select an option from the **Role** dropdown and then select **Save Permissions**.



The role changes from custom to public.