Manage Roles in Permissions Administration

Last modified on 05/16/2025 12:35 pm EDT

Public roles Custom roles Manage public and custom roles

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.

Permissions A	Administration		
Providers Staff	Roles Internal Roles	Permissions Permission Grid	
Name	Owner	Description	+ Add Role
Billing Staff	Public	Staff which requires access to only billing information.	View Delete
BTG Admin	Public	Practice group admin responsible for reviewing BTG requests	View Delete
Nurse	Public	Nurse / PA that requires supervising signature	View Delete
Office Manager	Public	Office/Practice Manager manages the office and other staff/doctor accounts	View Delete
Provider	Public	Provider that has access to the entire system	View Delete
Staff	Public	Staff that has access to fundamental system tasks.	View Delete

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**.

New Role		×
Name:		
IT Admin		
Description:		
Technical staff who needs access to the entire system		
Permissions		
Create and Update Patients 0		
Access Scheduling 0		✓
Appointment Provider Selection ()		
Use iPad EHR 0		✓
Access to Message Center 1		
Create and Update Contacts 0		✓
	Close Save rol	e

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.

Permissions A	Administration		
Providers Staff	Roles Internal R	oles Permissions Permission Grid	
Name	Owner	Description	+ Add Role
Billing Staff	Public	Staff which requires access to only billing information.	View Delete
BTG Admin	Public	Practice group admin responsible for reviewing BTG requests	View Delete
Nurse	Public	Nurse / PA that requires supervising signature	View Delete
Office Manager	Public	Office/Practice Manager manages the office and other staff/doctor accounts	View Delete
Provider	Public	Provider that has access to the entire system	View Delete
Staff	Public	Staff that has access to fundamental system tasks.	View Delete
IT Admin	Olivia Admin	Technical staff who needs access to the entire system	Edit Delete

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**.

Edit Role: IT Admin	×
Name:	
IT Admin	
Description:	
Technical staff who needs access to the entire system	
✓ Update Users with Role	
Permissions	
Create and Update Patients ()	
Access Scheduling 0	<
Appointment Provider Selection ()	<
Use iPad EHR 0	✓
Access to Message Center ()	<
Close Sav	e 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.

Permissions for Camille Staff	×
Role: Staff	~
Permissions	
Create and Update Patients ()	
Access Scheduling 1	2
Appointment Provider Selection ()	2
Use iPad EHR 0	2
Access to Message Center 1	2
Create and Update Contacts 0	<
Access Clinical Notes 0	
Archive Signed Consent Forms ()	
Configure Decision Support Intervention 0	2
Close	Save Permissions

The role changes from public to custom.

Permissi	ons A	dmini	stration					
Providers	Staff	Roles	Internal Roles	Permissions	Permission Grid			
Staff					Role			
Camille Staff					Custom			C View

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.

Permissions for Ca	mille Staff	×
Role:	✓ Custom Billing Staff [public]	1
Permissions	BTG Admin [public] Nurse [public]	
Create and Update Patien	Office Manager [public]	
Access Scheduling 0	Staff [public]	
Appointment Provider Sel	IT Admin	
Use iPad EHR ()		
Access to Message Center	er 🔁	
Create and Update Conta	cts 0	
Access Clinical Notes ()		
Archive Signed Consent F	forms	
Configure Decision Suppo	ort Intervention ()	
Close		Save Permissions

The role changes from custom to public.

Permissi	ions A	\dmini	stration			
Providers	Staff	Roles	Internal Roles	Permissions	Permission Grid	
Staff					Role	
Camille Staf	ť				Public	;