

System and Custom Roles

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System roles | Custom roles | Manage system and custom roles

Your practice can have staff members with different permission levels. You can use roles to customize which staff members have access to different permissions.

You can manage:

- Roles on the **Roles & Permissions** page.
- User-level roles on the **Providers** and **Staff** pages.

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

System roles

Select **Account > Practice Management > General Management > Roles & Permissions** to view the DrChrono system roles or any custom roles you've created.

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

| 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 | | | | |
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The assigned role and description appear at the top of the section. You can search for permissions to see whether they're enabled for the role, or filter by enabled or disabled permissions.

View Role ✕

Role
Billing Staff

Description
Staff which requires access to only billing information.

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| Permission | Description | |
|------------------------------|--|---|
| Billing | | |
| Access Billing | Allow the user to view and interact with the billing system | |
| Show Billing Tab | Allow the user to view and edit information in the billing tab in the appointment view | ✓ |
| Show Billing Summary | Allow the user to view and edit information in the billing summary screen | ✓ |
| Access Institutional Billing | Allow the user to view and interact with the institutional claims | ✓ |
| Billing Administrator | Allow the user to manage sensitive billing data. | ✗ |
| Operation | | |
| Billing Intelligence | Allows the user to access the Billing Intelligence pages. | ✓ |

Custom roles

- When you modify permissions at the user level, the [user's role changes from system to custom](#).
- You can [revert a staff member's role from custom to system](#).
- 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.
- Select **Edit** to open the drawer to view the permissions attributed to that role.

Create a custom role

1. Select **Account > Practice Management > General Management > Roles & Permissions**.
2. Select **Add Role**.

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 |

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3. Enter the name and description of your new custom role.
4. Select the permissions and then select **Add Role**.



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

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

| 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 | | | | |
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Edit a custom role

1. Select **Account > Practice Management > General Management > Roles & Permissions**.
2. Select **Edit** for the specific role.
3. Edit the permissions and select **Save Changes**.