

# Adding a New Role

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Within your practice, different staff members can have different levels of permission. With staff roles, you can easily customize which staff members have access to different permissions within the EHR. This guide will teach you how to change your staff roles and add new roles.

To begin, go to **Account** and select **Staff Permissions**.

The screenshot shows a navigation menu with two main sections: PROVIDER SETTINGS and PRACTICE SETTINGS. Under PROVIDER SETTINGS, there are links for Account Settings, onpatient Settings, Account Setup, Custom Fields, API, and App Directory. Under PRACTICE SETTINGS, there are links for Offices, Staff Members, Staff Permissions (which is highlighted with a blue bar), and eRx Settings.

To add a new role, select the **Roles** tab. Here you can view a list of active roles that can be applied to your staff members. Select the **+Add Role** button.

The screenshot shows the 'Roles' tab selected in the 'Permissions Administration' section. A table lists existing roles with columns for Name, Owner, and Description. Each row has 'View' and 'Delete' buttons. A '+ Add Role' button is located at the top right of the table.

Name	Owner	Description	
Billing Staff	Public	Staff which requires access to only billing information.	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

Enter the name and description of your new role. Select the permissions for your new role. When complete, select the **Save Role** button.

## Edit Role: Billing Manager

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Name:

Billing Manager

Description:

Oversees all billing and billers

Update Users with Role

### Permissions

Create and Update Patients ⓘ



Access Scheduling ⓘ



Appointment Provider Selection ⓘ



Use iPad EHR ⓘ



Access to Message Center ⓘ



Close

Save role

Your new role will appear at the bottom of the Roles list. Notice that instead of the 'View' button on public roles, your new role will have an **Edit** option. Public roles cannot be edited but you can adjust the individual user's permissions.

To edit your new custom role, select the **Edit** button and you'll be able to edit the permissions of the role once again by selecting and unselecting the checkboxes.

Provider	Public	Provider that has access to the entire system	View	Delete
Staff	Public	Staff that has access to fundamental system tasks.	View	Delete
Billing Manager	Brendan	Oversees all billing and billers	Edit	Delete

Edit

Delete