

# 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.
  - Billing Staff
  - BTG Admin
  - Nurse
  - Office Manager
  - Provider
  - Staff
- Select **View** to see the role's permissions.
- You cannot edit or delete public roles.

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

## 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

Access Scheduling

Appointment Provider Selection

Use iPad EHR

Access to Message Center

Create and Update Contacts

Close

Save role

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

Permissions 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
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:

Description:

☒ Update Users with Role

**Permissions**

Create and Update Patients ⓘ	<input checked="" type="checkbox"/>
Access Scheduling ⓘ	<input checked="" type="checkbox"/>
Appointment Provider Selection ⓘ	<input checked="" type="checkbox"/>
Use iPad EHR ⓘ	<input checked="" type="checkbox"/>
Access to Message Center ⓘ	<input checked="" type="checkbox"/>

Close 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.

**Permissions for Camille Staff** ×

Role:

**Permissions**

Create and Update Patients ⓘ	<input checked="" type="checkbox"/>
Access Scheduling ⓘ	<input checked="" type="checkbox"/>
Appointment Provider Selection ⓘ	<input checked="" type="checkbox"/>
Use iPad EHR ⓘ	<input checked="" type="checkbox"/>
Access to Message Center ⓘ	<input checked="" type="checkbox"/>
Create and Update Contacts ⓘ	<input checked="" type="checkbox"/>
Access Clinical Notes ⓘ	<input checked="" type="checkbox"/>
Archive Signed Consent Forms ⓘ	<input type="checkbox"/>
Configure Decision Support Intervention ⓘ	<input checked="" type="checkbox"/>

Close Save Permissions

The role changes from public to custom.

Permissions Administration		
Providers	Staff	Roles Internal Roles Permissions Permission Grid
Staff		Role
Camille Staff	Custom	<a href="#">View</a>

## Revert a staff member's role from custom to public

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

Permissions for Camille Staff

Role:

Custom

Billing Staff [public]

BTG Admin [public]

Nurse [public]

Office Manager [public]

Provider [public]

Staff [public]

IT Admin

Permissions	
Create and Update Patient	<input checked="" type="checkbox"/>
Access Scheduling <span>?</span>	<input checked="" type="checkbox"/>
Appointment Provider Sel	<input checked="" type="checkbox"/>
Use iPad EHR <span>?</span>	<input checked="" type="checkbox"/>
Access to Message Center <span>?</span>	<input checked="" type="checkbox"/>
Create and Update Contacts <span>?</span>	<input checked="" type="checkbox"/>
Access Clinical Notes <span>?</span>	<input checked="" type="checkbox"/>
Archive Signed Consent Forms <span>?</span>	<input type="checkbox"/>
Configure Decision Support Intervention <span>?</span>	<input checked="" type="checkbox"/>

Close

Save Permissions

The role changes from custom to public.

Permissions Administration		
Providers	Staff	Roles Internal Roles Permissions Permission Grid
Staff		Role
Camille Staff	Public	<a href="#">View</a>