How do I edit user/staff account permissions?

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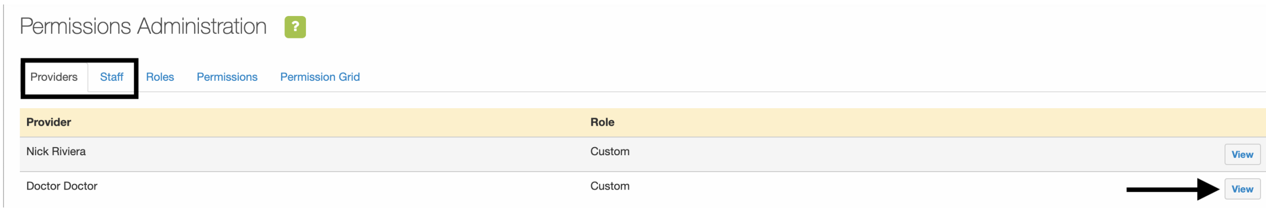
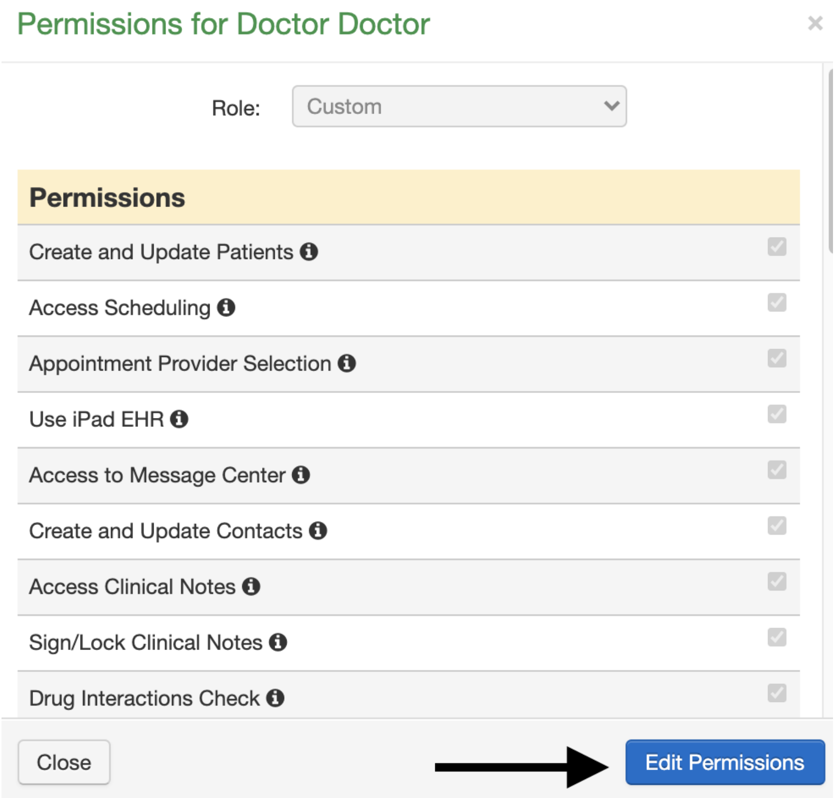
DrChrono allows you to customize what users are able to access. You can restrict/allow access to certain aspects of the software through the staff permissions function under **Account** > **Staff Permissions**.

First, go to **Account** > **Staff Permissions**.

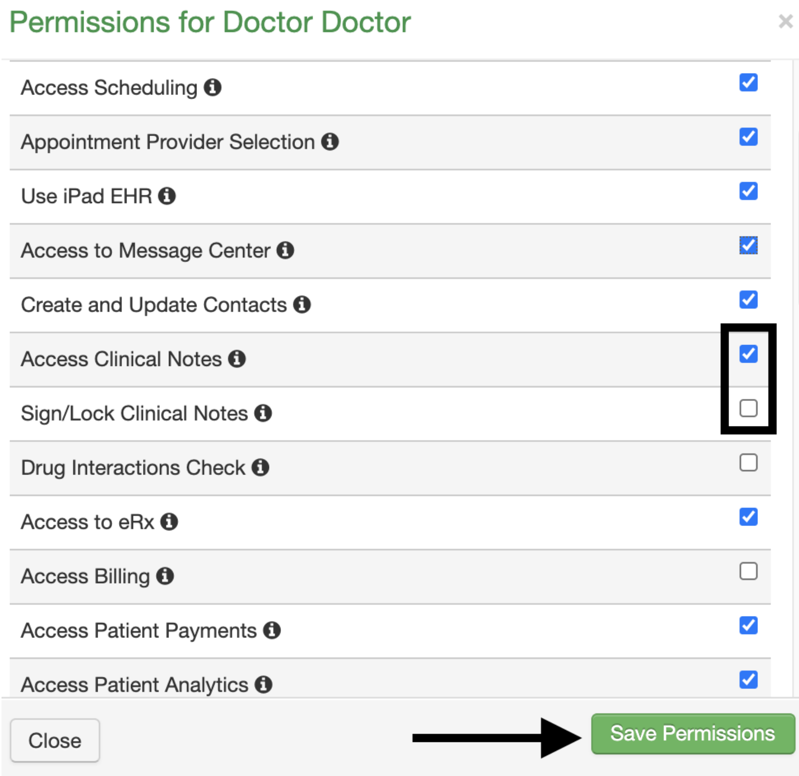


To edit permissions for any user, click **View** to the right of their name. If you need to edit staff permissions, be sure the **Staff** tab is selected.

Once you have selected the user and clicked **View**, click **Edit Permissions**.

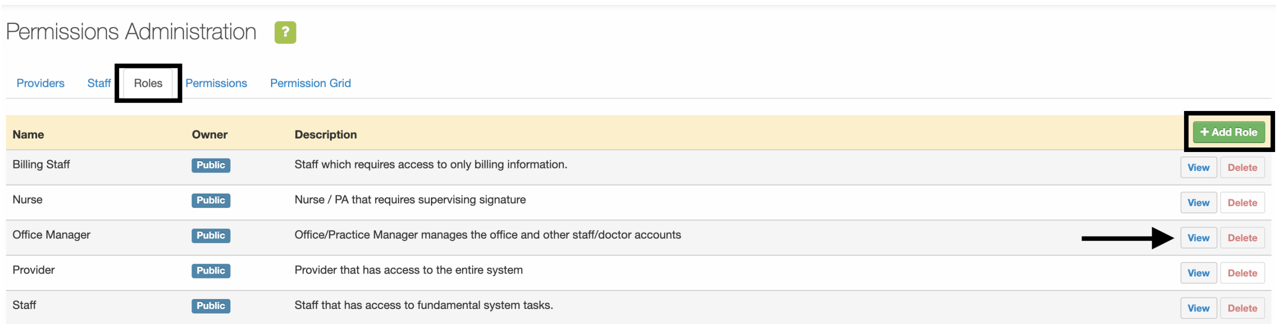


After clicking **Edit Permissions**, check or uncheck the permissions you would like to add or remove. If you hover over **"i"** you can see a short description of what the permission allows access to. You can also find this information under the **Permissions** tab. Once you have completed the process, click **Save Permissions**.



Permissions can also be assigned based on **Roles**. **Roles** are preassigned permissions based on the day-to-day functions of a staff member.

Click on the **Roles** tab. Click **View** to see the permissions associated with a role. If you would like to create your own set of permissions for a role, click **+ Add Role**. This will allow you to assign custom roles to users in your account.



You can always edit a user's permissions using the first steps in this article. Once a user's role is changed, their role will be '**custom**'.

The **Permission Grid** tab gives you a quick overview of the permissions users have or do not have. You can then follow the steps at the beginning to add or remove permissions.