

Edit Provider and Staff Permissions

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

The procedure below shows images from the **Staff** page, but the instructions for the provider workflow is the same.

Edit a provider's or staff member's permissions

1. Select **Account > Practice Management > General Management > Providers or Staff**.
2. Select **View** and scroll down to the **Permissions** section.

Staff	2-Factor Auth	Action
Camille Nurse <small>Nurse (System)</small> Username: camilles Email: cnurse@email.xyz Cell Phone: 111-222-3333 Primary Provider: Hannah Provider		View Deactivate
Marcus Staff <small>Nurse (System)</small> Username: marcusstaff Email: mstaff@email.xyz Primary Provider: Hannah Provider		View Deactivate

Showing 2 of 2 records You have reached the end.

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 provider or staff member, or filter by enabled or disabled permissions.

Permissions		Edit
Role Nurse	Description Nurse / PA that requires supervising signature	
<input type="text" value="message"/>		All
Operation		All ✓ Enabled Disabled
Access to Message Center	Allow the user to access the message center	
Access All Messages for Practice Group	Allow the user to view and interact with the tasks for their whole practice group. This permission requires the 'Share Communication' permission in the Practice Group settings to be enabled.	

3. Select **Edit** to open the **Edit Role & Permissions** side panel.

Permissions → Edit

Role	Description
Nurse	Nurse / PA that requires supervising signature

Search permission All ▾

Permission	Description	Status
Appointment scheduling		
Access Scheduling	Allow the user to view, add, and edit patient appointments and other scheduling features	✓
Appointment Provider Selection	Allow the user to schedule appointments for all providers in the practice group	✓
Patient		
Export Patients	Allow the user to use patient export tools	✓
Create and Update Patients	Allow the user to create and update patient information	✓
Drug Interactions Check	Allow the user to perform drug interaction checks	✓

4. Add or remove permissions by turning toggle switches on or off, and select **Save Changes**.

Permissions are organized by category, and you can enable or disable them individually or by group. You can also use the **Permission Grid** to select user permissions you'd like to compare side by side.

Edit Role & Permissions ✕

Search permission All ▾

Appointment scheduling Disable All

Access Scheduling	Allow the user to view, add, and edit patient appointments and other scheduling features	<input checked="" type="checkbox"/>
Appointment Provider Selection	Allow the user to schedule appointments for all providers in the practice group	<input checked="" type="checkbox"/>
Patient Enable All		
Export Patients	Allow the user to use patient export tools	<input checked="" type="checkbox"/>
Create and Update Patients	Allow the user to create and update patient information	<input checked="" type="checkbox"/>
Drug Interactions Check	Allow the user to perform drug interaction checks	<input checked="" type="checkbox"/>
Access to eRx	Allow access to eRx screens	<input checked="" type="checkbox"/>
Share Patients	Allow access to all patients in a practice group	<input type="checkbox"/>
Add new referring sources	Allow the user to add new referring sources on the patient demographics screen	<input type="checkbox"/>
Archive Signed Consent Forms	Allow the user to archive and unarchive signed consent forms	<input checked="" type="checkbox"/>
Disable Send to All Patients Option	Disable option "send to all patients" within the Patients > Send Email section of DrChrono.	<input type="checkbox"/>

[Cancel](#) [Save Changes](#)

Permission Grid

The **Permission Grid** provides a quick overview of users' permissions. Hover over the **i** icon to view the permission description.

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

2. Select **Permission Grid**.

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	Hannah Provider	Edit Delete
Showing 6 of 6 records		< < Prev Next > >	

3. Select the users whose permissions you'd like to compare side by side. You can also search for specific permissions to compare side by side.

Permission Grid		
Camille Nurse X Marcus Staff X	X	Search Permission
Permission / User	Camille Nurse	Marcus Staff
Appointment scheduling		
Access Scheduling ⓘ	✓	✓
Appointment Provider Selection ⓘ	✓	✓
Patient		
Export Patients ⓘ	✓	✓
Create and Update Patients ⓘ	✓	✓
Drug Interactions Check ⓘ	✓	✓
Access to eRx ⓘ	✓	✓
Share Patients ⓘ		
Add new referring sources ⓘ		
Archive Signed Consent Forms ⓘ		
Disable Send to All Patients Option ⓘ		
Bulk Patient EHI Export ⓘ		
Single Patient EHI Export ⓘ		
Practice Patient Chart Header Settings ⓘ		
Practice Patient Chart Sidebar Nav Settings ⓘ		