Patient Chart Permissions

Last modified on 05/30/2025 1:48 pm EDT

Turn on the Patient Header permissions | Turn on the patient chart sidebar permissions

When adjusting 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

If any users in your practice are assigned to a custom role, it may impact your ability to use the**Patient Header** and patient chart sidebar.

- When permissions are adjusted at the user level, the user's role automatically switches to custom when you save the **Permissions Administration** page (**Account** > **Staff Permissions** > **Providers** or **Staff** tab).
- To revert a staff member's role from custom to public, select an option from the **Role** dropdown and then select **Save Permissions**.
- The best practice is to create a new role on the **Roles** tab on the **Permissions Administration** page to customize permissions and assign staff members (as a group) to a specific role to prevent possible workflow disruptions.

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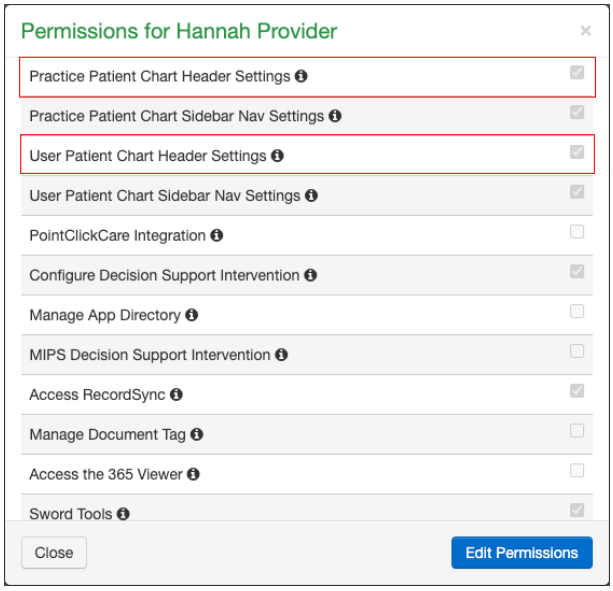
Turn on the Patient Header permissions

Turn on the permissions to the **Patient Header** at the administrative or user level on the **Permissions Administration** page.

1. Select **Account** > **Staff Permissions** > **Providers** or **Staff** tab.
2. Select **View**.

   The permissions window opens
3. Select **Edit Permissions**.
4. Do one or both of the following:
   - Select the **Practice Patient Chart Header Settings** checkbox to customize the patient chart header settings for the practice at the administrative level.
   - Select the **User Patient Chart Header Settings** checkbox to customize the patient chart header settings at the user level.
5. Select **Save Permissions**.

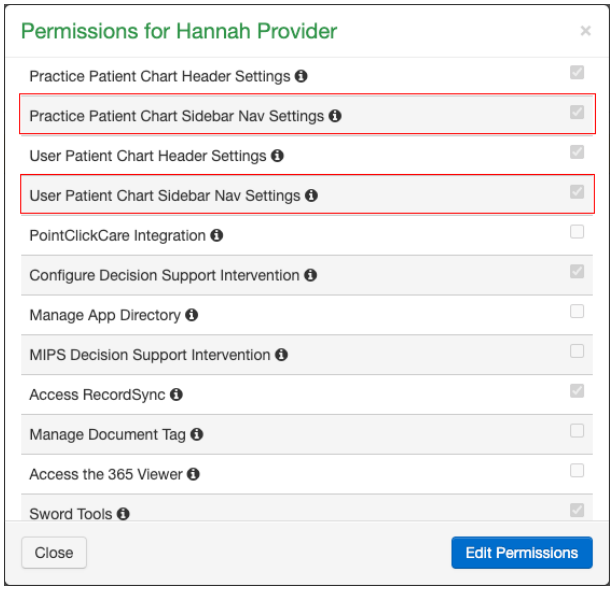


Turn on the patient chart sidebar permissions

You can turn on the permissions to the patient chart sidebar at the administrative or user level on the **Permissions Administration** page.

1. Select **Account** > **Staff Permissions** > **Providers** or **Staff** tab.
2. Select **View**.

   The permissions window opens
3. Select **Edit Permissions**.
4. Do one or both of the following:
   - Select the **Practice Patient Chart Sidebar Nav Settings** checkbox to customize the patient chart sidebar settings for the practice at the administrative level.
   - Select the **User Patient Chart Sidebar Nav Settings** checkbox to customize the patient chart sidebar settings at the user level.
5. Select **Save Permissions**.


Permissions for Hannah Provider
Practice Patient Chart Header Settings
Practice Patient Chart Sidebar Nav Settings
User Patient Chart Header Settings
User Patient Chart Sidebar Nav Settings
PointClickCare Integration
Configure Decision Support Intervention
Manage App Directory
MIPS Decision Support Intervention
Access RecordSync
Manage Document Tag
Access the 365 Viewer
Sword Tools
Close
Edit Permissions