Patient Chart Permissions

Last modified on 03/31/2025 10:59 am EDT

Set Patient Header Permissions | Set patient chart sidebar navigation permissions

When adjusting patient chart 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, this may impact your ability to leverage this new functionality.

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 to a standard public role, the user must select an option from the dropdown for role types and then save the changes. The best practice is to create a new role on the **Roles** tab on the **Permissions Administration** page (**Account** > **Staff Permissions**) to customize permissions and assign staff members (as a group) to a specific role to prevent possible workflow disruptions.

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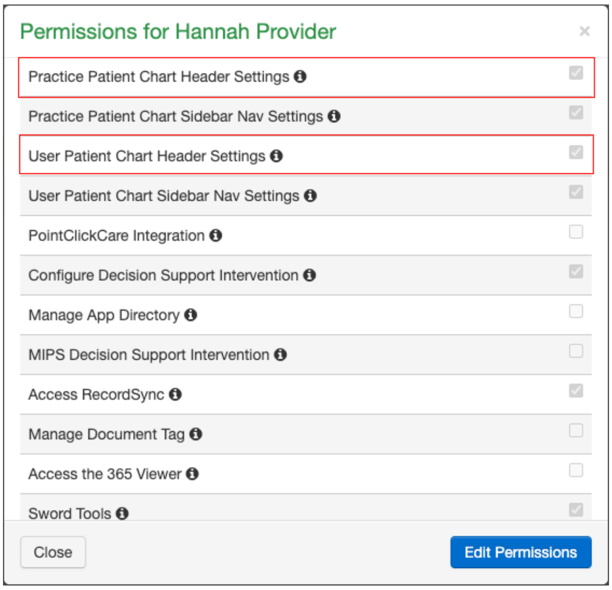
Set Patient Header permissions

To view the updated **Patient Header**, you can turn on the permission 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**.

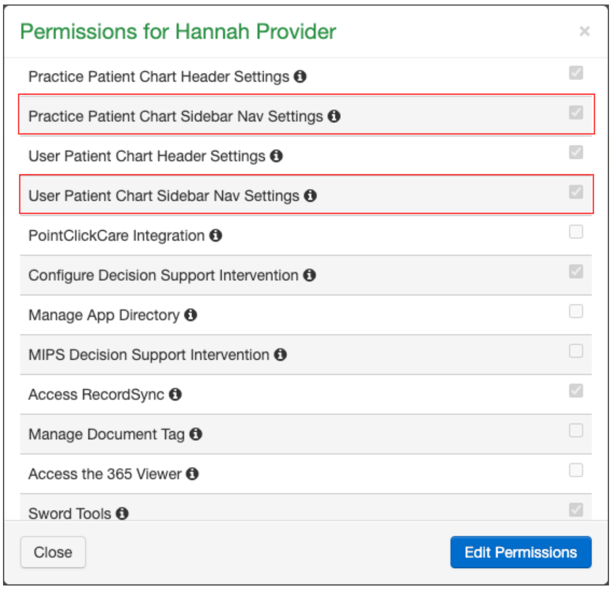


Set patient chart sidebar navigation permissions

To access the patient chart sidebar navigation view, you can turn on permissions 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**.



Click the link to watch a tutorial about Administrative Customization.