Edit Provider and Staff Roles

Last modified on 09/22/2026 3:19 pm EDT

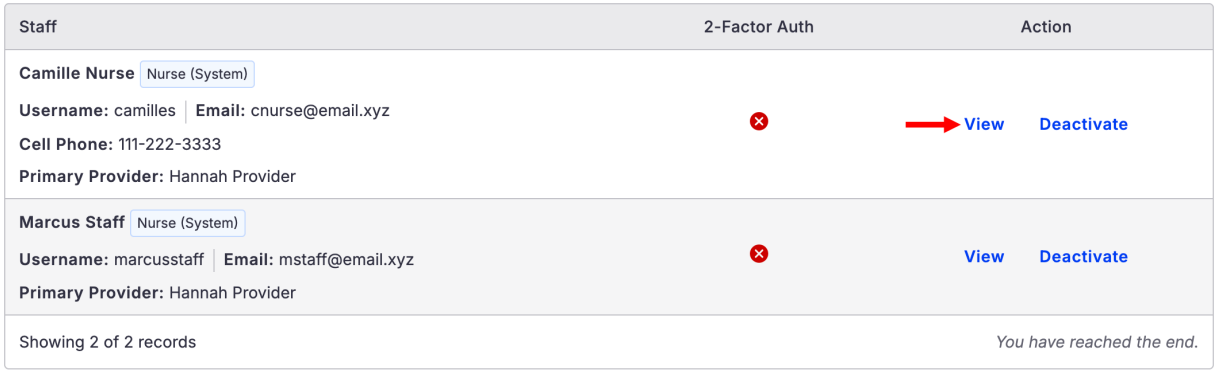
Change a provider or staff member's role | Edit a provider's or staff member's role | Change a provider's or staff member's role from custom to system

Your practice can have staff members with different permission levels. Use roles to customize which staff members have access to different permissions. You can edit or change provider or staff roles on the **Providers** or **Staff** page.

> The procedures below show images from the **Staff** page, but the provider workflow is the same.

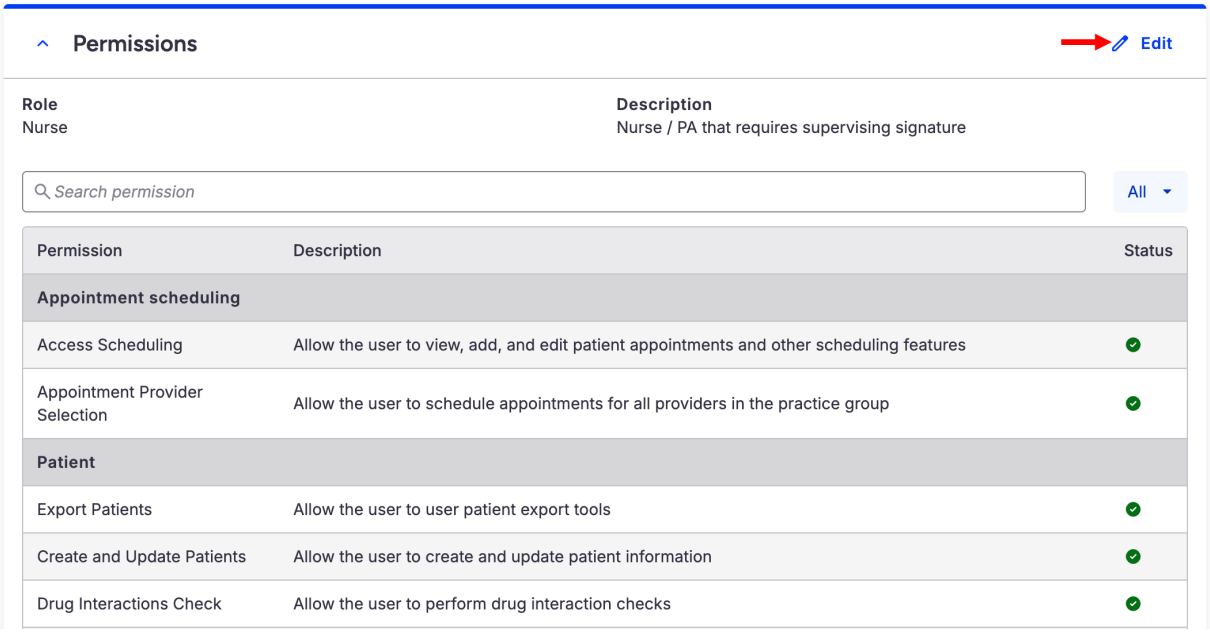
Change a provider's or staff member's role

1. Select **Account** > **Practice Management** > **General Management** > **Providers** or **Staff**.
2. Select **View** for a specific provider or staff member and scroll down to the **Permissions** section.

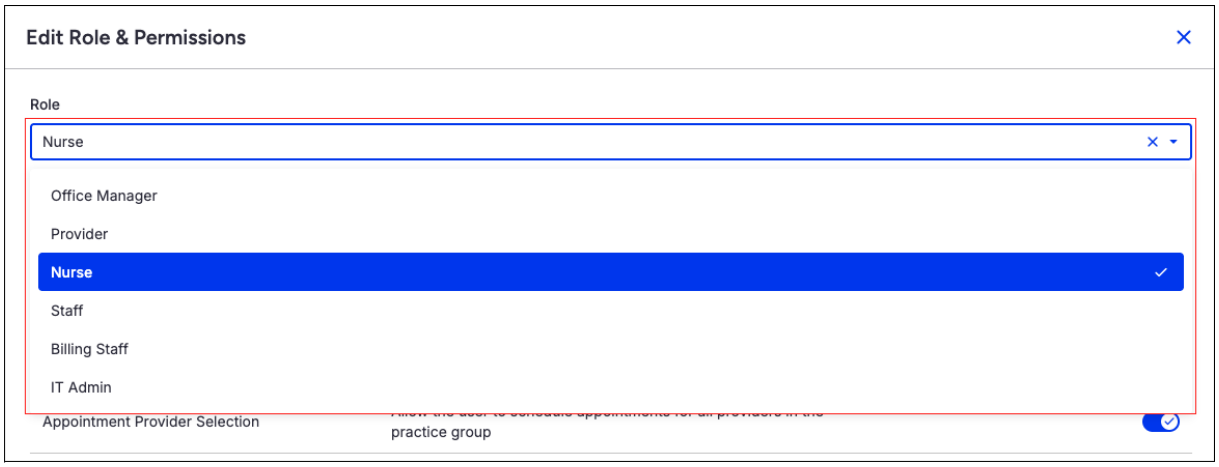


The assigned role and description appear at the top of the section.

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



4. Select the new role from the **Role** menu and then select **Save Changes**.

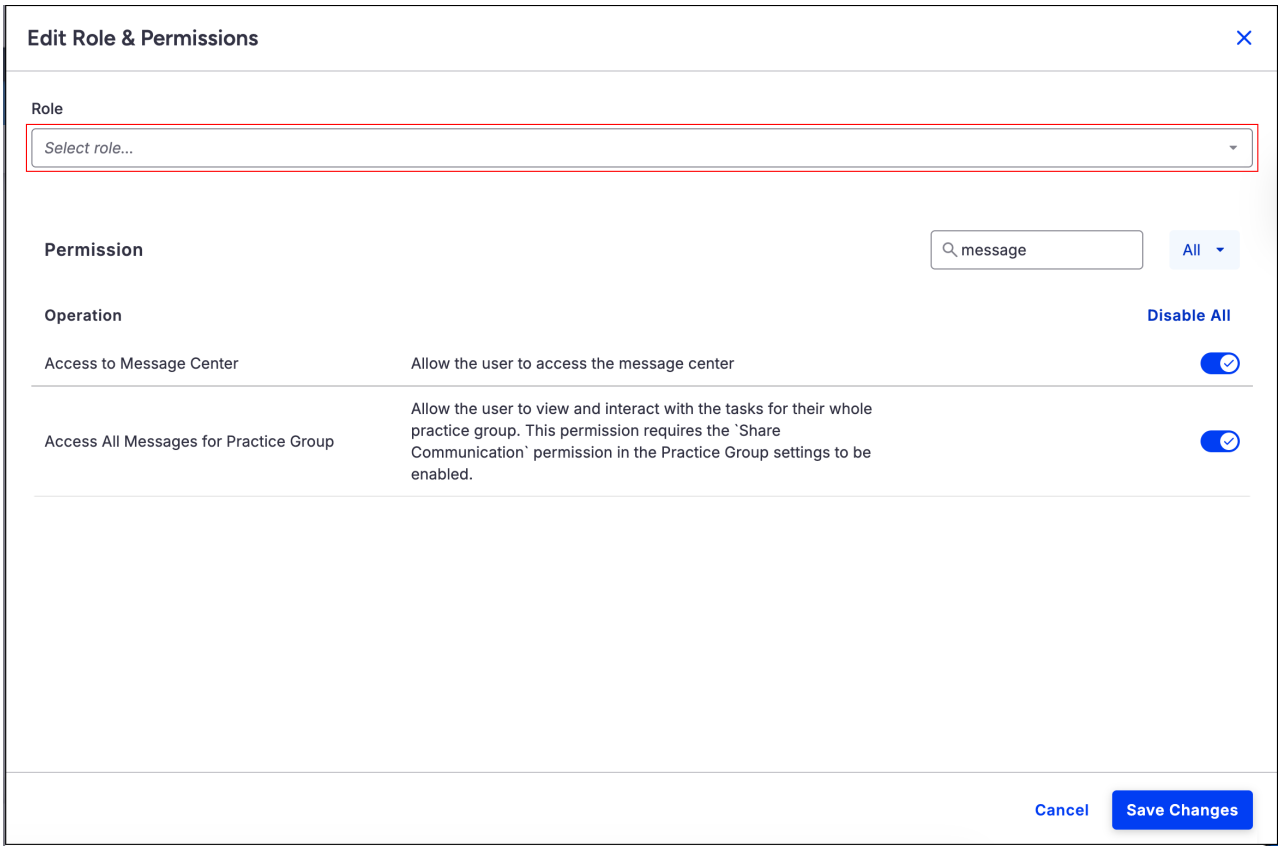


Edit a provider's or staff member's role

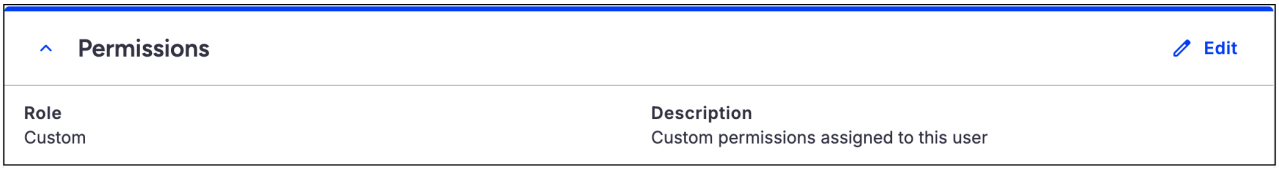
From the **Edit Role & Permissions** drawer, update the permissions and select **Save Changes**.

> Permissions are organized by category, and you can enable or disable them individually or by group.

In the example below, we searched for message permissions for a staff member with the **Nurse** role and enabled the **Access All Messages for Practice Group** permission. Once you modify a system role, the **Role** dropdown no longer shows a system role selection.



In the **Permissions** section, our staff member's role is now listed as a custom role.

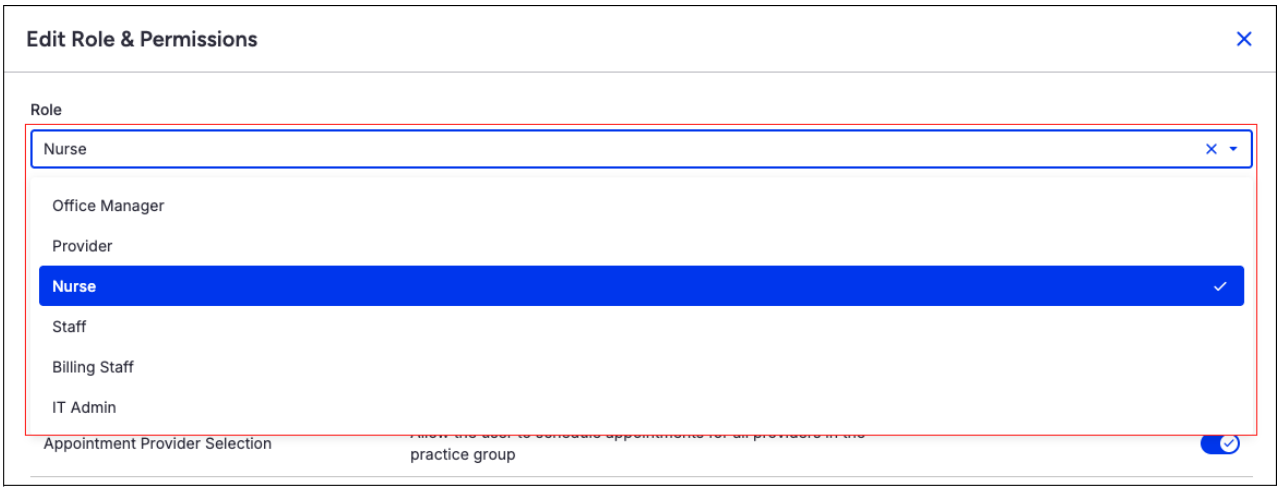


On the **Staff** page, our staff member's role is also listed as a custom role.

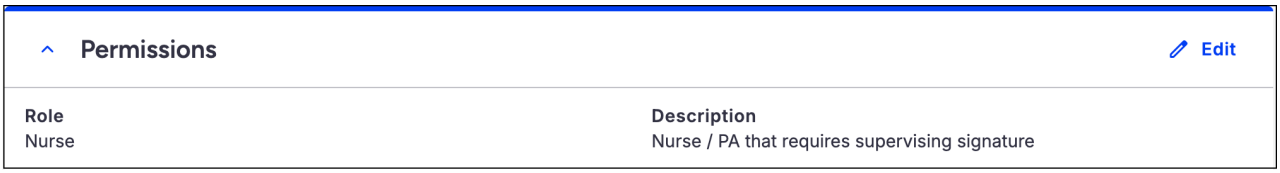


Change a provider's or staff member's role from custom to system

From the **Edit Role & Permissions** drawer, select an option from the **Role** dropdown and select **Save Changes**.



In the **Permissions** section, our staff member now has the nurse system role.



On the **Staff** page, our staff member's role is also listed as a system role.

Staff	2-Factor Auth	Action
Camille Nurse Nurse (System) **Username:** camilles | **Email:** cnurse@email.xyz **Cell Phone:** 111-222-3333 **Primary Provider:** Hannah Provider		View Deactivate