

Edit Provider and Staff Roles

Last modified on 05/19/2026 9:36 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 instructions for provider workflows are 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.

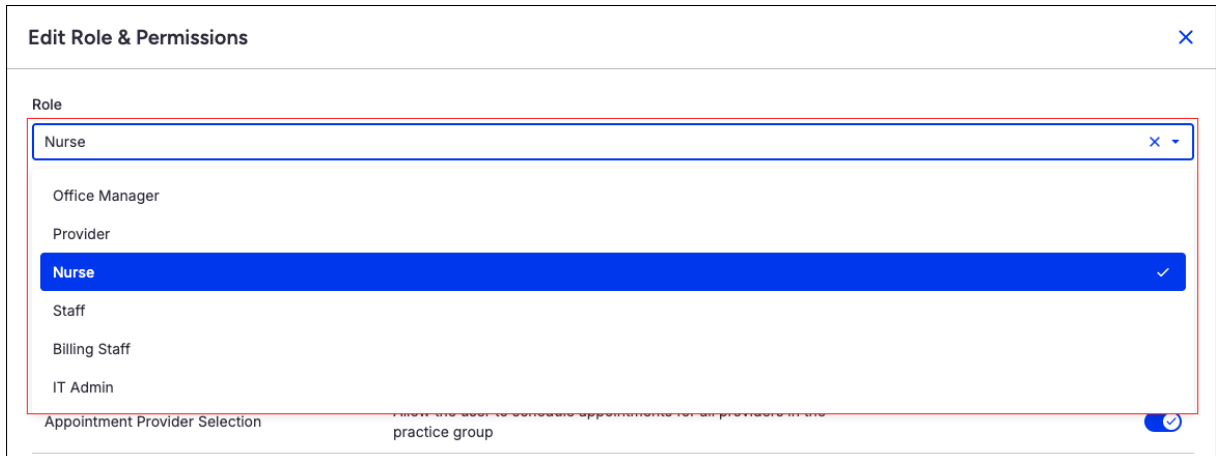
Staff	2-Factor Auth	Action
Camille Nurse Nurse (System) Username: camilles Email: cnurse@email.xyz Cell Phone: 111-222-3333 Primary Provider: Hannah Provider		View Deactivate
Marcus Staff Nurse (System) Username: marcusstaff Email: mstaff@email.xyz Primary Provider: Hannah Provider		View Deactivate
Showing 2 of 2 records		<i>You have reached the end.</i>

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

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

Permissions		Edit
Role	Description	
Nurse	Nurse / PA that requires supervising signature	
<input type="text" value="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 user 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. Select the new role from the **Role** menu and then select **Save Changes**.

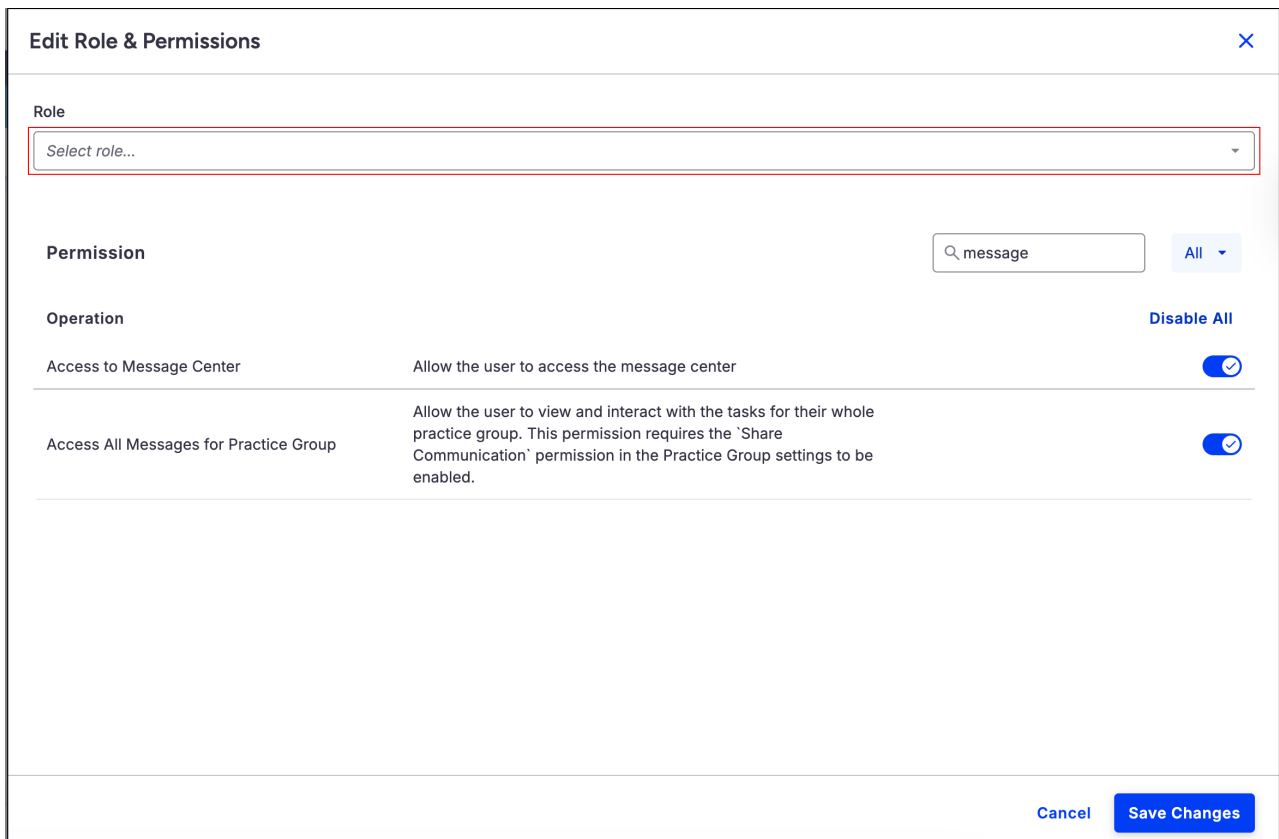


Edit a provider's or staff member's role

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.

Permissions ✎ Edit	
Role Custom	Description Custom permissions assigned to this user

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

Staff	2-Factor Auth	Action
Camille Nurse Custom Username: camilles Email: cnurse@email.xyz Cell Phone: 111-222-3333 Primary Provider: Hannah Provider	⊗	View Deactivate

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**.

Edit Role & Permissions ✕

Role

Nurse ✕ ▾

Office Manager

Provider

Nurse ✓

Staff

Billing Staff

IT Admin

Appointment Provider Selection ✔

With this user, you generate appointments for all providers in the practice group

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

Permissions ✎ Edit	
Role Nurse	Description Nurse / PA that requires supervising signature

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

