

Create Custom Roles

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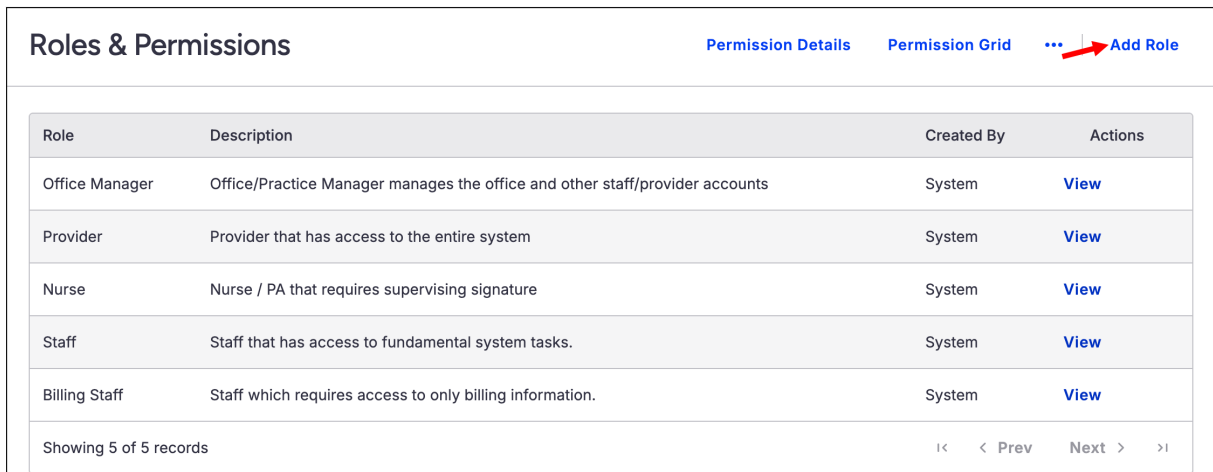
Your practice can have staff members with different permission levels. Use roles to customize which staff members have access to different permissions. You can create custom roles on the **Roles & Permissions** page.

When modifying 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

Create a custom role

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



The screenshot shows the 'Roles & Permissions' page. At the top right, there are three tabs: 'Permission Details', 'Permission Grid', and 'Add Role'. The 'Add Role' tab is highlighted with a red arrow. Below the tabs is a table with the following columns: Role, Description, Created By, and Actions. The table contains five rows of roles: Office Manager, Provider, Nurse, Staff, and Billing Staff. Each row has a 'View' link in the Actions column. At the bottom of the table, it says 'Showing 5 of 5 records' and has navigation arrows for 'Prev' and 'Next'.

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

Showing 5 of 5 records

3. Enter the name and description of your new custom role.
4. Select the permissions and then select **Add Role**.



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

Add Role ✕

Role *

Description

Permission 🔍 Search permission All ▾

Appointment scheduling Enable All

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 Disable All

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	🔘
Access to eRx	Allow access to eRx screens	🔘
Share Patients	Allow access to all patients in a practice group	🔘

Cancel
Add Role

Your new role appears at the bottom of the role list. Unlike system roles, you can edit and delete the custom roles you've created.

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
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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	Anna Admin	Edit Delete

Showing 6 of 6 records
⏪ < Prev Next > ⏩