Create Custom Roles

Last modified on 05/19/2026 2:03 pm EDT

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.

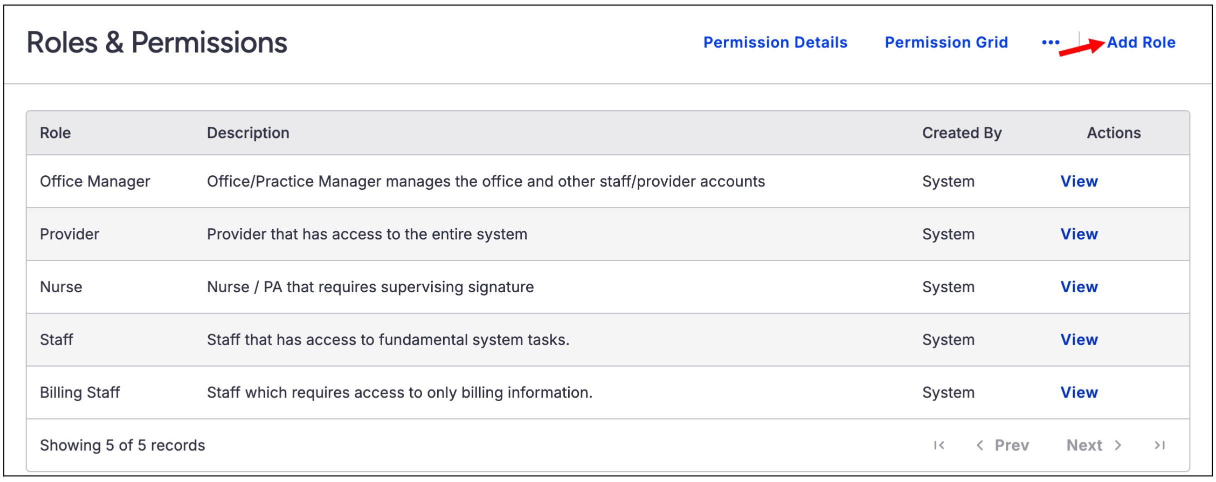
When modifying permissions and settings, the system follows a hierarchical order.

- 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**.



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
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

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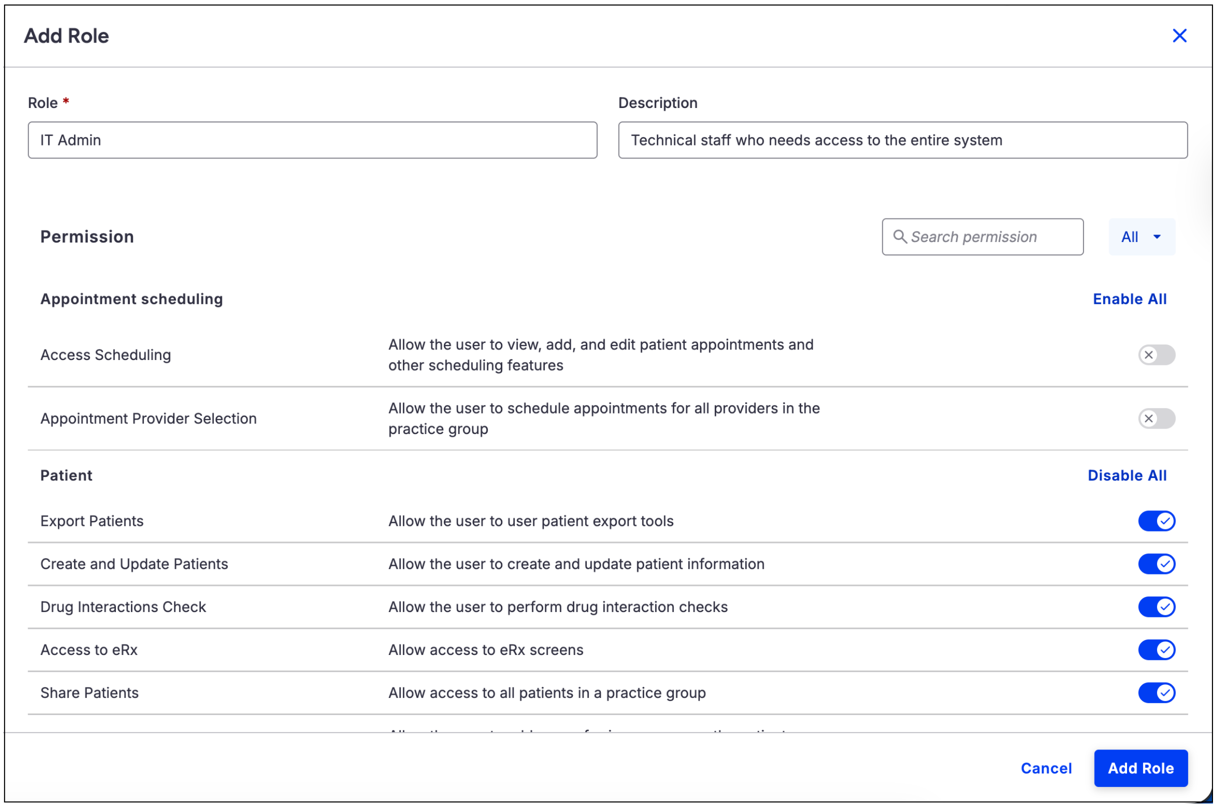
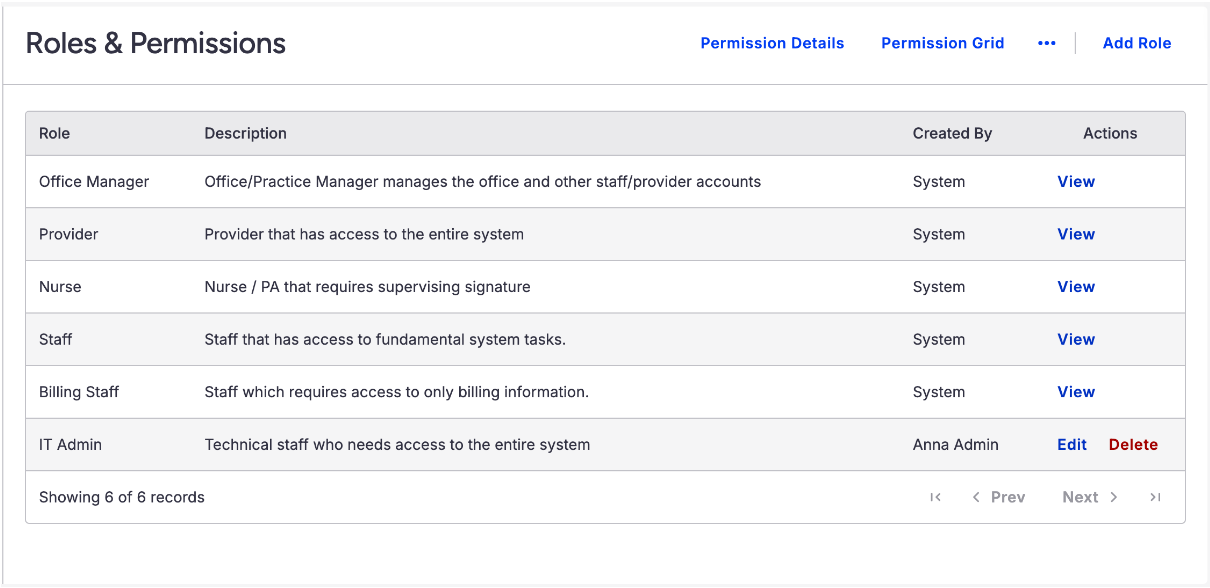
3. Enter the name and description of your new custom role.

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.



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.



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IT Admin	Technical staff who needs access to the entire system	Anna Admin	Edit Delete

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