

# Roles

Last Modified on 04/28/2026 10:46 pm EDT

## Overview of Roles

Roles in the application dictate exactly what access each individual user has to a given screen. Ensure roles are properly assigned ensure security within your application. Roles are often only accessible by administrative users and should be reviewed regularly.

Roles have two key components to consider

1. **Assigning a screen to a role:** This determines, in a generic way, what can be accessed by users that are granted that role.
2. **Assigning a role to a user:** Once the screens have been assigned to the role, each user may be assigned this role.

### Warning

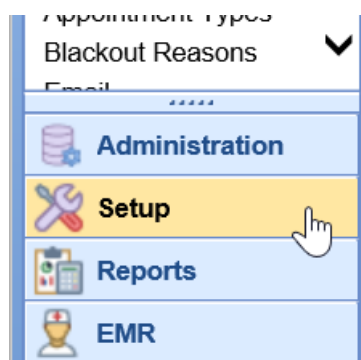
It is important to note, that one user can be assigned to more than one role. When this happens, the highest level of security granted to a screen across all the roles assigned will decide what access the user is ultimately provided.

## Assign a screen to a role

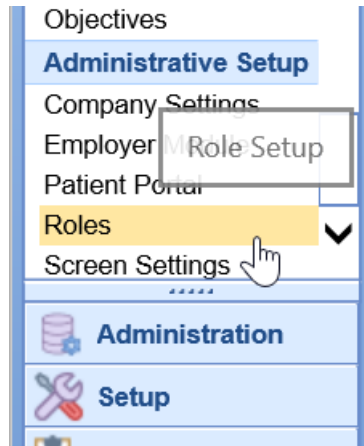
The first step in managing roles is assigning a screen to a role and granting that role a specific access level for that screen

## Steps

1. **Login** to OfficeEMR as an administrator.
2. Navigate to **Setup**.



3. Select **Roles**.



4. Search for or select a **group** and **screen** from the list.

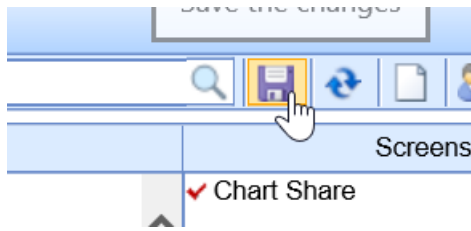
Setup: Roles		Choice				
Groups	Screens	Roles	Off	Read	Update	Write
EMR - ChartShareMD	✓ Chart Share	IGenericVARAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
✓ Chart Tabs		!Internal-IsalusHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Processing		!iSalusAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Setup		!iSALUSHealthcare-TMedAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
EMR - EMCoding		!iSALUSHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Processing		!MarketingTest-IReferralAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Setup		!VarAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
EMR - General		*Administrator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chart Tabs		*Ancillary Medical Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General		*Billing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient Setup		*Front Office	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient SOAP		*Provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Processing		Analytics Cube	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reporting		AnywhereCare Standalone	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Setup		Basic	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting		Billor	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Template Setup						
ToDo						
User Setup						

5. **Assign** the role a level of access. Please note, your list of 'Roles' may vary. You can add new roles as needed for your practice.

- Off = No access to the screen at all.
- Read = Screen can usually be seen, but not edited.
- Update = Items on the screen can usually be changed, but no new items can be added.
- Write = Full access to the screen and all features.

Roles	Off	Read	Update	Write
IGenericVARAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
!Internal-IsalusHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
!iSalusAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
!iSALUSHealthcare-TMedAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
!iSALUSHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
!MarketingTest-IReferralAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
!VarAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
*Administrator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
*Ancillary Medical Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
*Billing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*Front Office	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
*Provider	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Analytics Cube	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Click **Save**.

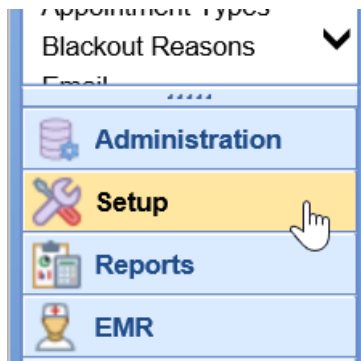


## Assign a Role to a User

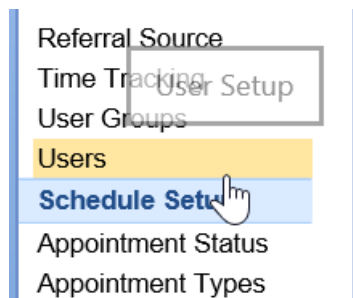
The second step in managing roles is assigning a role or roles to a user.

### Steps

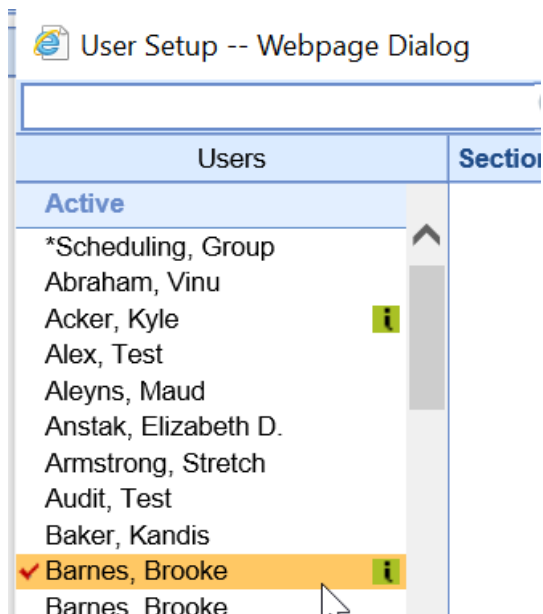
1. **Login** to OfficeEMR as an administrator.
2. Navigate to **Setup**.



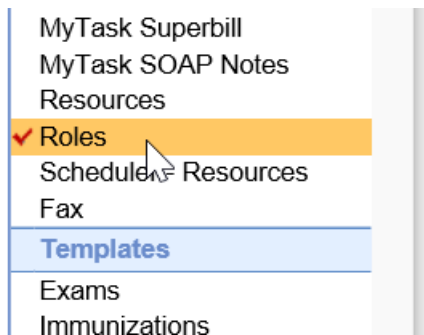
3. Select **Users**.



4. **Select the user** you want to add roles to from the list on the left.

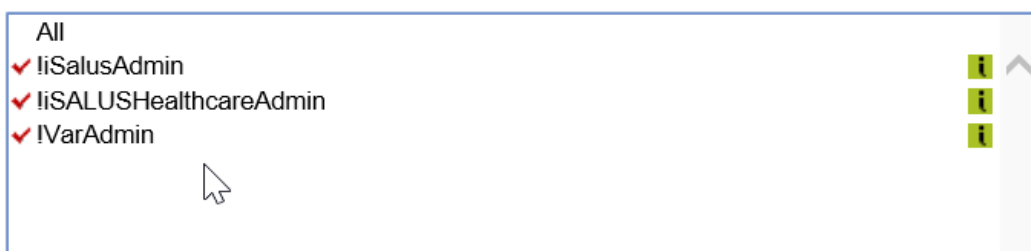


5. Select **Roles** from the list on the right.



6. **Add roles** by placing a check mark next to the name of the role. Remove roles by unchecking the role. Users can be assigned more than one role. If a user has more than one role, the highest access granted to the various roles takes precedence.

**Roles - Barnes, Brooke (!lbarnes)**



7. Click **Save**.



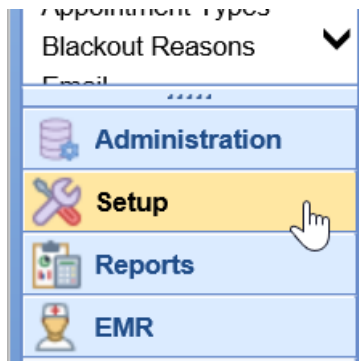
# Add a new role

Roles can often be thought of as 'access groups'. Different groups of people at the practice will have different levels of access.

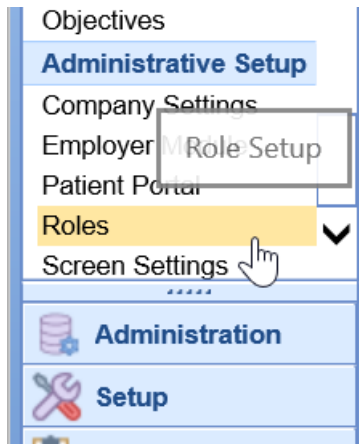
Many practices will create roles in the application that closely align with job duties assigned at the practice. For example, you may have a role for a provider, a nurse, and a phlebotomist. Each of these roles require different access levels throughout the application. You can add these new roles, assign access to the role, then assign the role to the user. In the event that users perform more than one job, they can be assigned more than one role and are ensured that they have the access necessary to complete their work.

## Steps

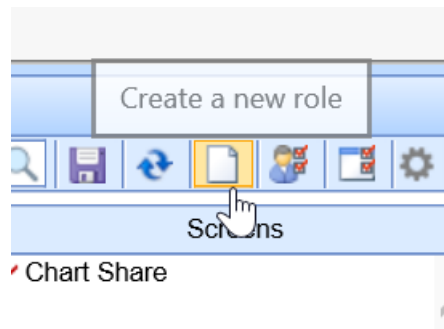
1. **Login** to OfficeEMR as an administrator.
2. Navigate to **Setup**.



3. Select **Roles**.



4. Click the **New** button to add a new role



5. Enter the **description** and click **OK**

**Pro Tip:**

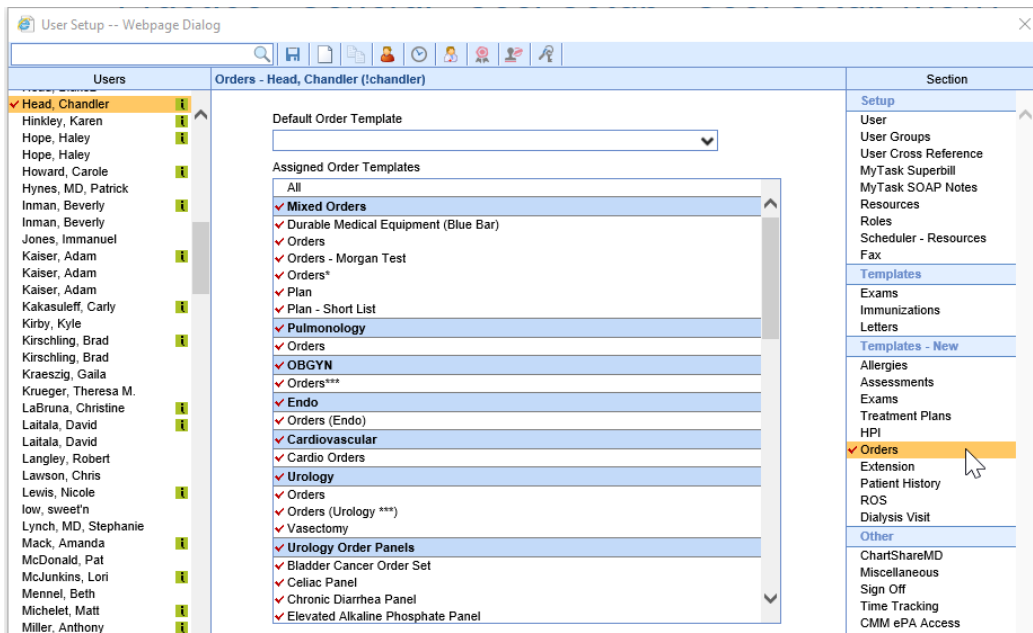
Now that the role is added, don't forget to [Assign a screen to a role](#) and [Assign a Role to a User](#).

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## EMR - General - User Setup - Templates New Tab - Orders

This role will give access to users wanting to add/remove orders templates from their drop-down in the respective chart tab. It will also allow the user to set a default order entry template so it does not need to be selected each time. This role works in conjunction with [User Setup \(new\)](#).

This screen is accessible from Setup > Basic Setup - Users > Templates - New | Orders



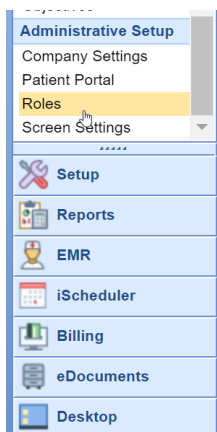
## Setup the Templates New Tab - Orders Role

### Setup the User Setup (new) Role

1. Click on the **Setup** portal.



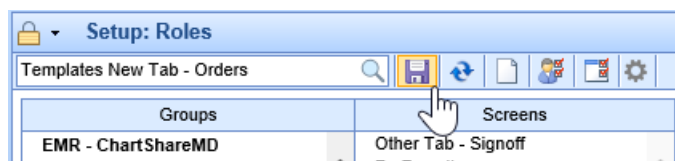
2. Select **Roles** under Administrative Setup.



3. Type "Templates New Tab - Orders" into the search box and hit the **Magnifying Glass** button.
4. Select the **Practice - General - User Setup - User Setup (new)** screen. Assign **Write** access to the desired Roles.

Groups	Screens	Roles	Off	Read	Update	Write	
EMR - ChartShareMD	Other Tab - Signoff	!GenericVARAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
Chart Tabs	Rx Favorites	!Internal-IsalusHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
Processing	Setup Tab - User MyTasks	!SalusAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	i
User Setup	Setup Tab - User MyTasks	!iSALUSHealthcare-TMedAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
EMR - EMCoding	Template Tab - Dialysis Visit	!iSALUSHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	i
Processing	Templates New Tab - Allergies	!MarketingTest-IReferralAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
Setup	Templates New Tab -	!VarAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	i
EMR - General	Templates New Tab - Exams	*Administrator	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Chart Tabs	Templates New Tab - History	*Ancillary Medical Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
General	Templates New Tab - HPI	*Billing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Patient Setup	✓ Templates New Tab - Orders	*Front Office	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Patient SOAP	Templates New Tab - Plans	*Provider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Processing	Templates New Tab - ROS	*Analytics Cube	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Reporting	Templates Tab - Exams						
Setup	Templates Tab -						
Supervision	User Rx Settings						

5. Press the **Save** button to save your changes.



## External - MyMedicalLocker - ToDo - Task - Patient Portal Role

### External - MyMedicalLocker - ToDo - Task Patient Portal Role

(Enhanced 4/28/2026)

Practices now have options allowing more granular control over how their users access communications from My Medical Locker. Access to Patient Portal messaging is controlled by two roles.

- **Task - Patient Portal - List**

Grants access to the My Tasks > Patient Portal queue (task list)

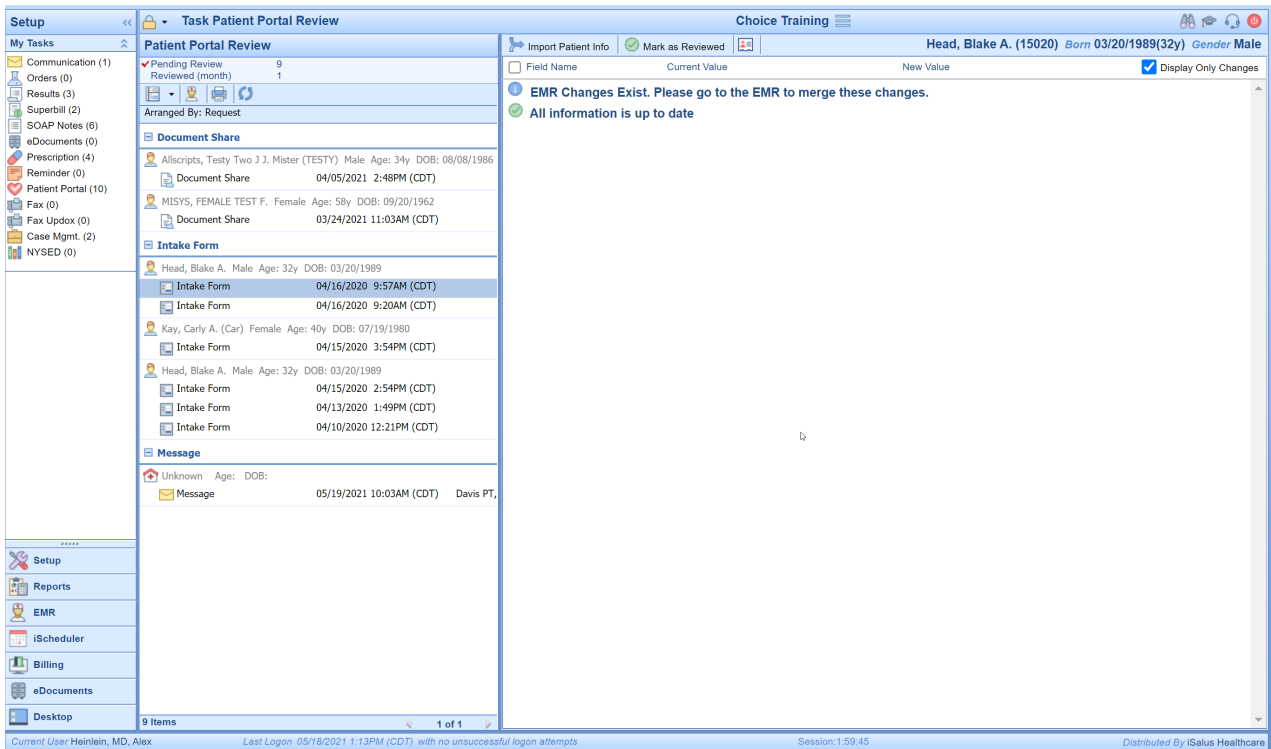
- **Task - Patient Portal**

Grants access to open and respond to Patient Portal messages received via Communication where the forwarded Patient Portal message contains a My Medical Locker Message link that users click to read/respond to the portal message

For practices that have users already set up with access to My Task > Patient Portal, their user accounts should be automatically set to write for both of these roles to ensure they do not have disruption to accessing their Patient Portal Messages. For practices wishing to add limited users, this article explains how to do so.

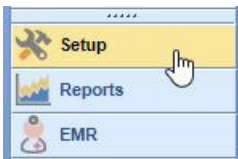
All communications from MyMedicalLocker will display in this To Do list including secure communications, Patient Intake submissions, shared documents, and appointment requests.

This screen is accessible from the My Tasks section of the application.

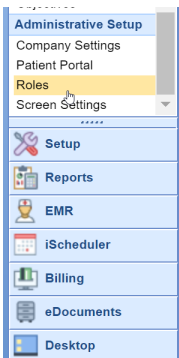


## Setup the Task Patient Portal Role

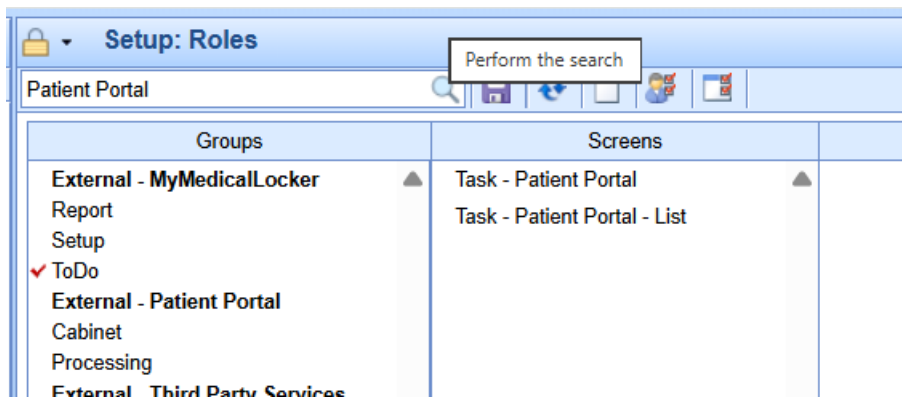
1. Click on the **Setup** portal.



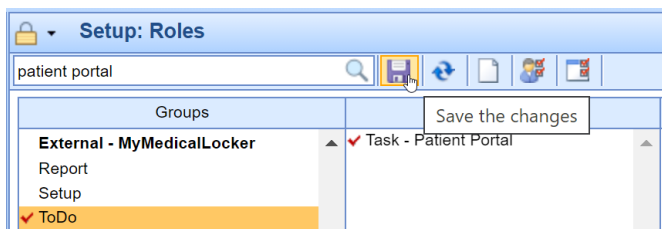
2. Select **Roles** under Administrative Setup.



3. Type in **Patient Portal** into the search box and hit the **Magnifying Glass** button and you should notice that the roles **Task - Patient Portal** and **Task - Patient Portal - List** are accessible:



4. Practice users with role setup permissions can control access to Patient Portal messages. **Full Access** allows users to view the Patient Portal queue and respond to messages directly. **Limited Access** prevents users from opening the queue; they will see "Patient Portal" in My Tasks but will receive a security message if they attempt to access it. These users can still respond to messages when they are forwarded through the Communications queue.
  - **Grant Full Access** by assigning **Write** privileges to **Task - Patient Portal - List** and **Task - Patient Portal**. In this scenario, the user:
    - Will have full Patient Portal message access without restrictions
  - **Grant Limited Access (response only)** by assigning **Write** privileges to **Task - Patient Portal**. In this scenario, the user:
    - Receives a security message if they attempt to open it
    - Can respond to forwarded Patient Portal messages via the Communications queue
5. Press the **Save** button to save your changes.



**Pro Tip:** Frequently a new individual role is created to assign this security access to. For example, you could create a role for Patient Portal Communications Only and then you can add in users you wish to have that limited Patient Portal Message access.

## Permission Behavior

- Access is role-based only
- Off = no access
- Write = full access to view and respond
- **Read/Update do not restrict functionality but instead behave as Write access**

# Practice - Patient Intake - Setup - Intake Assignment Role

## Practice - Patient Intake - Setup - Intake Assignment Role

This role grants users access to the Patient Intake Assignment screen.

This screen is accessible via the Patient Setup > More menu; the Patient Index card menu in the iScheduler and EMR; and the quick pay screen for an appointment in the iScheduler.

This screen allows users to manually assign new intake forms, view Active/Historically assigned intake forms, and merge the completed form data into the patient's chart.

Intake Assignment - Google Chrome

qatest.isalushealthcare.com/officemd/screens/IntakeAssign.htm?PID=23254&timestmp=1621456378663&u1=pdos...

**Kay, Carly A. 07/19/1980(40y) Female** ✔ Connected to MyMedicalLocker

**Next 5 Appointments**

Date	Type	Scheduled Width	Location	Inake Name	Status
05/20/2021 12:00PM	Allergy Shot	Alex Heinlein, MD	EverHealth Medical Center Follow-up Patient Intake		Completed

Active  Historical

**Intakes Assigned**

ID	Intake Name	Type	Due Date	Status	User	Created	Updated
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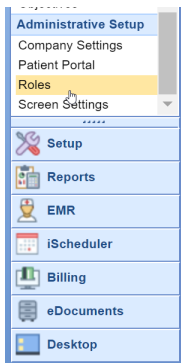
New Edit Delete Fill out in Office Merge Response

## Setup the Intake Assignment Role

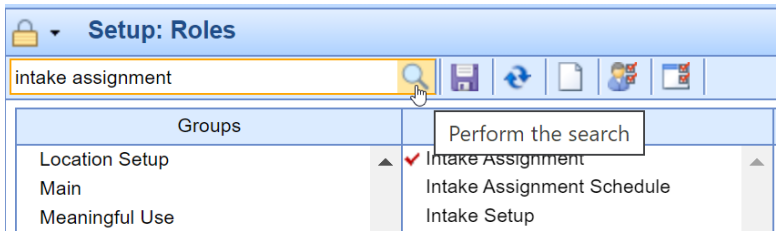
1. Click on the **Setup** portal.



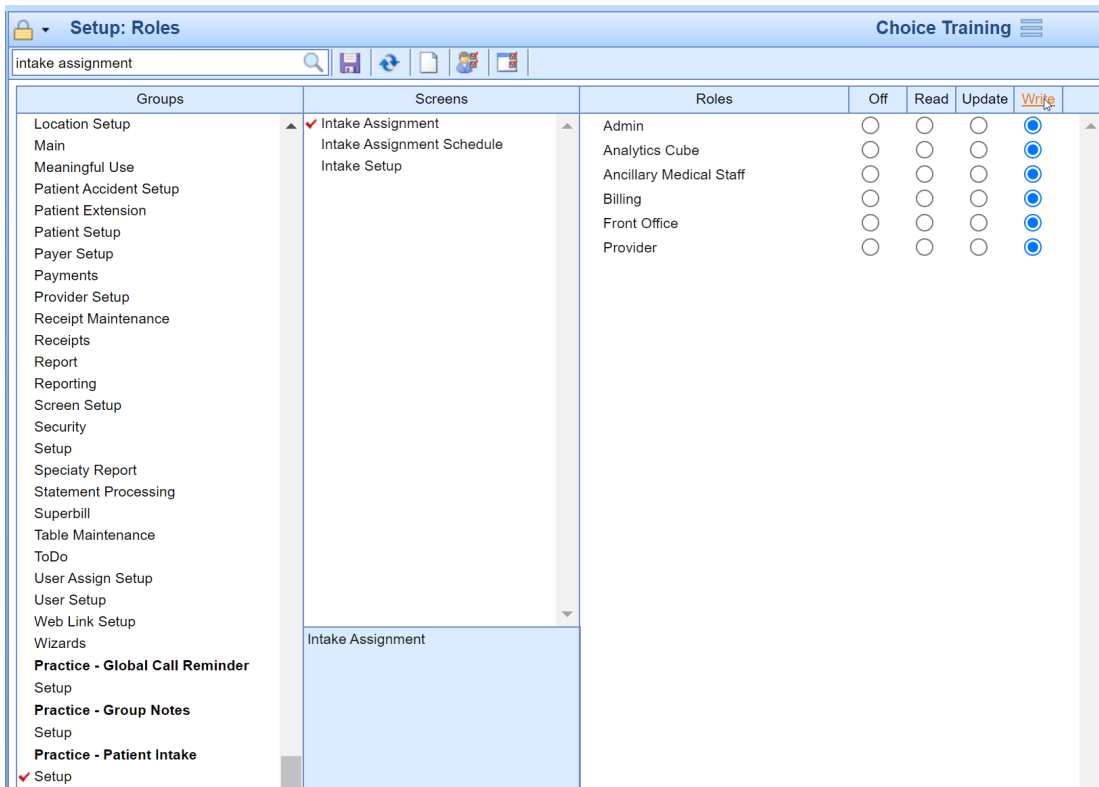
2. Select **Roles** under Administrative Setup.



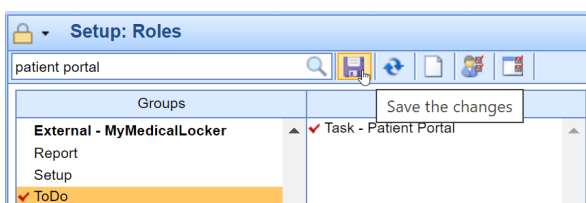
3. Type Intake Assignment into the search box and hit the **Magnifying Glass** button.



4. The **Practice - Patient Intake - Setup - Intake Assignment** role should return and be selected. Assign **Write** access to the appropriate roles. Best practice is to assign Write access to all roles.



5. Press the **Save** button to save your changes.



# Practice - Patient Intake - Setup - Intake Assignment Schedule Role

## Practice - Patient Intake - Setup - Intake Assignment Schedule Role

This role grants users access to the Patient Intake Assignment Schedule screen.

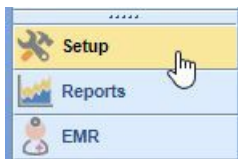
This screen is accessible via the iScheduler > Intake Schedule button.

This screen allows users to view Active/Completed assigned intake forms for the entire practice, and merge the completed form data into the patient's chart.

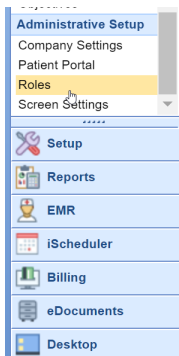
Appointment (2)		Forms to Merge (0)		Completed (0)							
Action	Office	Time	Patient	Device	Resource	Intake Name	Intake	Required	CoPay	Paid	Elig.
Assign Intake		1:15 AM	Lotesto, Louis 02/02/1953(68y) Unknown		Smith MD, Lane C.				\$0.00	\$0.00	
Assign Intake		11:00 AM	Glaum TEST PT, Ron-test no D. 05/18/195...		Smith MD, Lane C.				\$0.00	\$0.00	

## Setup the Intake Assignment Schedule Role

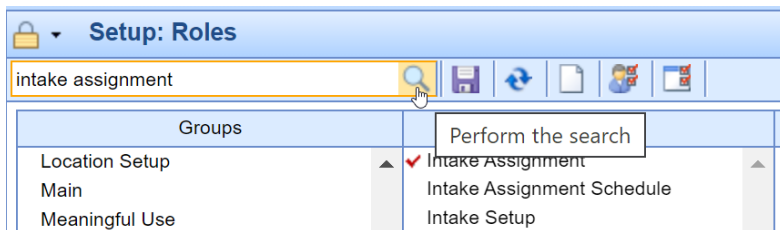
1. Click on the **Setup** portal.



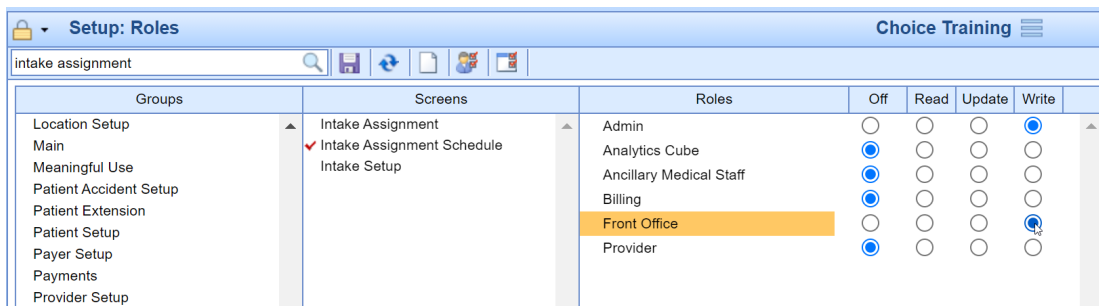
2. Select **Roles** under Administrative Setup.



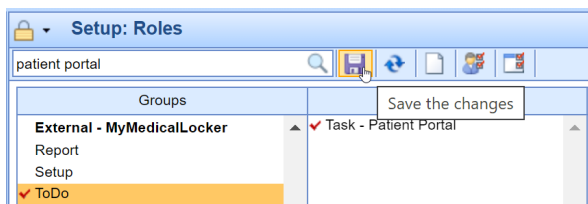
3. Type Intake Assignment into the search box and hit the **Magnifying Glass** button.



4. Click on the **Practice - Patient Intake - Setup - Intake Assignment Schedule Role** screen. Assign **Write** access to the appropriate Admin, Front Office and Call Room Roles.



5. Press the **Save** button to save your changes.

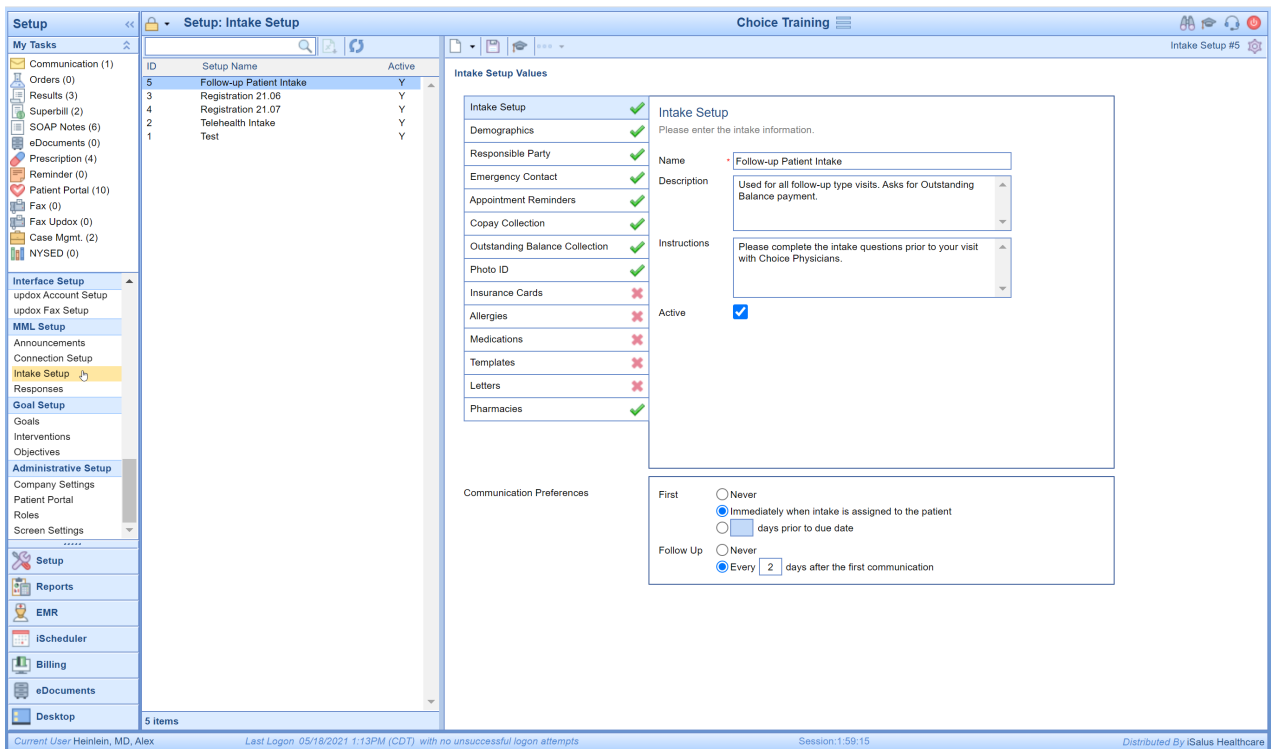


## Practice - Patient Intake - Setup - Intake Setup Role

### Practice - Patient Intake - Setup - Intake Setup Role

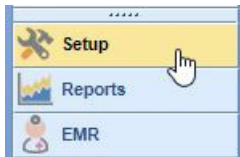
This role grants users access to view, modify and create net intelligent intake forms.

This screen is accessible from the Setup portal > MML Setup menu.

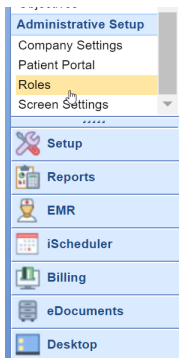


## Setup the Intake Setup Role

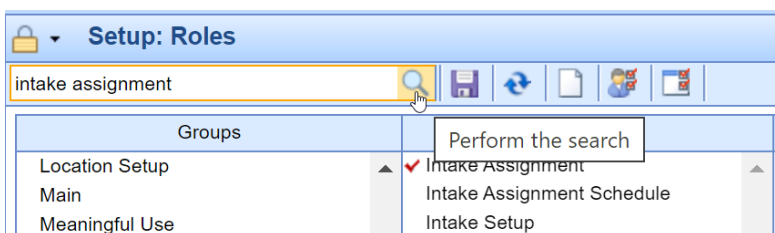
1. Click on the **Setup** portal.



2. Select **Roles** under Administrative Setup.



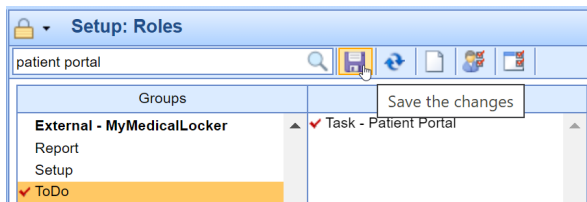
3. Type Intake Assignment into the search box and hit the **Magnifying Glass** button.



4. Select the **Practice - Patient Intake - Setup - Intake Setup Role** screen. Assign **Write** access to the appropriate Admin and Intake Coordinator Roles.

Setup: Roles		Choice Training				
Groups	Screens	Roles	Off	Read	Update	Write
Location Setup	Intake Assignment	Admin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Main	Intake Assignment Schedule	Analytics Cube	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meaningful Use	Intake Setup	Ancillary Medical Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient Accident Setup		Billing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient Extension		Front Office	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Patient Setup		Provider	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Payer Setup						
Payments						
Provider Setup						

5. Press the **Save** button to save your changes.



## Practice - General - User Setup - User Setup (new)

This role gives access to the user setup screen. The user setup screen will allow the user to change many items related to their experience within the application. Many of the individual items within this screen have their own roles to further control the user's ability to modify their settings.

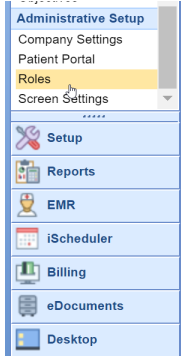
This screen is accessible from Setup > Basic Setup - Users.

## Setup the User Setup (new) Role

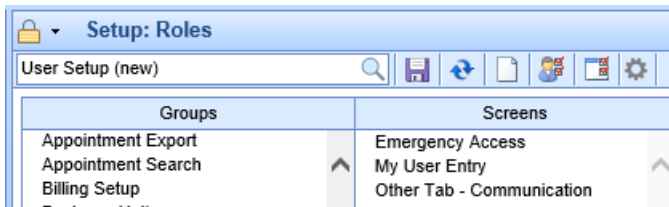
1. Click on the **Setup** portal.



2. Select **Roles** under Administrative Setup.



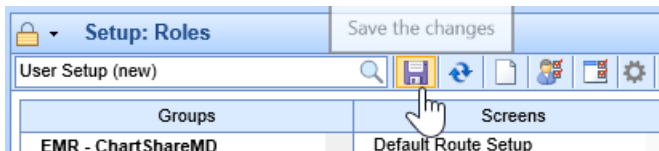
3. Type "User Setup (new)" into the search box and hit the **Magnifying Glass** button.



4. Select the **Practice - General - User Setup - User Setup (new)** screen. Assign **Write** access to the desired Roles.

Roles	Off	Read	Update	Write	
!GenericVARAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
!Internal-IsalusHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
!iSalusAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
!iSALUSHealthcare-TMedAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
!iSALUSHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
!MarketingTest-!ReferralAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
!VarAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
<b>*Administrator</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>

5. Press the **Save** button to save your changes.



## Practice - Patient Intake - ToDo - Task - Intelligent Intake

This role grants access to the My Tasks - Intake menu item in the top left section of the screen. This section is used to review non-clinical information associated with a submitted Intelligent Intake form. Clinical information

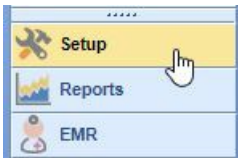
remains within the EMR only.

The screenshot shows the 'Task Intelligent Intake' window. On the left is a 'My Tasks' sidebar with categories like Communication (70), Orders (129), Results (5), etc. The main area displays a table of tasks with columns for #, Patient, and Date/Time (EDT). A task is selected, and a panel on the right titled 'Please review the following changes' shows demographic information for two patients, comparing 'Current Value' and 'New Value' for fields like First Name, Address, and City.

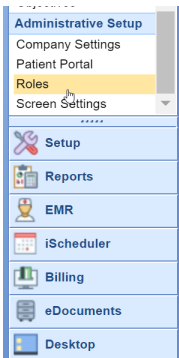
Field Name	Current Value	New Value
Demographics		
<input type="checkbox"/> First Name	Cliff	Test Three
<input type="checkbox"/> Apartment/Suite #	Sidestreet	
<input type="checkbox"/> Zip Code	60076	46143
<input type="checkbox"/> City	Skokie	Greenwood
<input type="checkbox"/> State	Illinois	Indiana
<input type="checkbox"/> First Name	Cliff	Test Three
<input type="checkbox"/> Apartment/Suite #	Sidestreet	
<input type="checkbox"/> Zip Code	60076	46143
<input type="checkbox"/> City	Skokie	Greenwood
<input type="checkbox"/> State	Illinois	Indiana
Demographics		
<input type="checkbox"/> First Name	Cliff	Test Three

## Setup the Task - Intelligent Intake Role

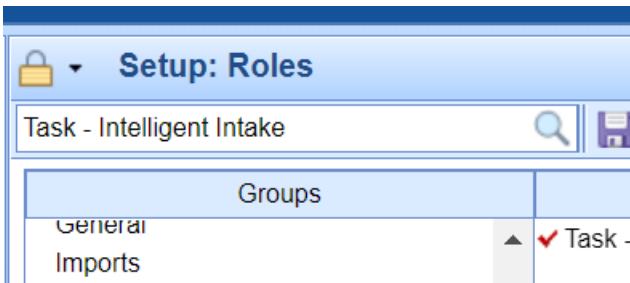
1. Click on the **Setup** portal.



2. Select **Roles** under Administrative Setup.



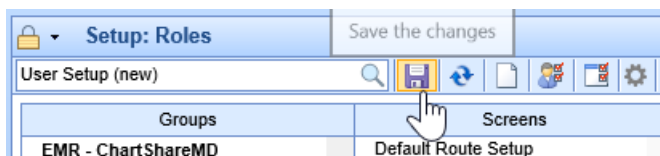
3. Type "Task - Intelligent Intake" into the search box and hit the **Magnifying Glass** button.



4. Select the **Practice - General - User Setup - User Setup (new)** screen. Assign **Write** access to the desired Roles.

Screens	Roles	Off	Read	Update	Write	
Task - Intelligent Intake	IAllmedsIncAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
	IBillnetSolutionsAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
	IInternal-IsalusHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	V
	IiSalusAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	i
	IiSALUSHealthcareAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	i
	IvarAdmin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	i
	Admin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
	Analytics Cube	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Ancillary Medical Staff	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Billing	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Front Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
	Provider	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

5. Press the **Save** button to save your changes.

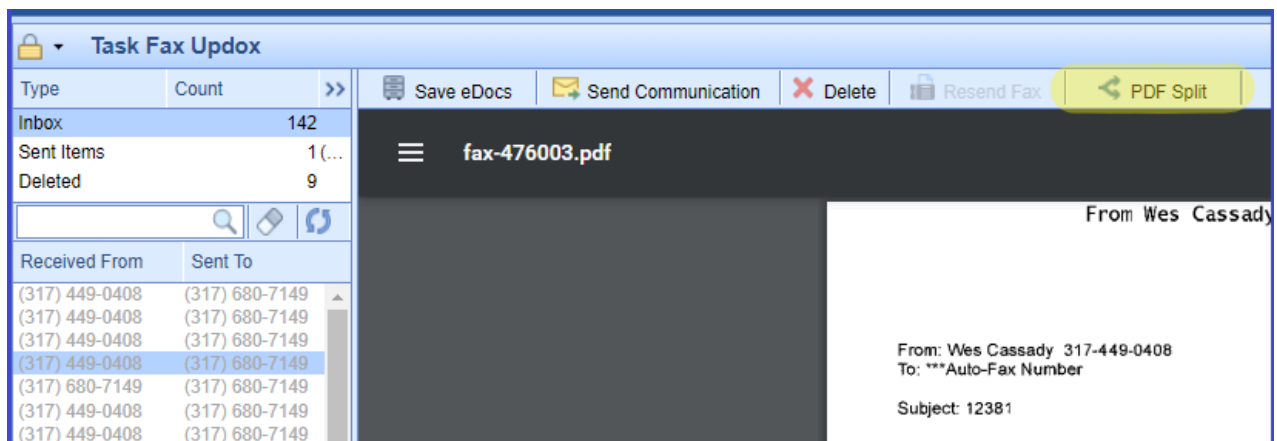


## Practice eDocuments - Processing - PDF Split Role

### Practice eDocuments - Processing - PDF Split Role

This role grants users access to utilize the PDF Split feature within the fax inbox in My Tasks.

This screen is accessible from My Tasks - Fax Updax > Inbox

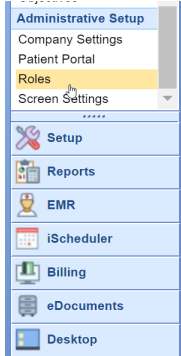


## Setup the Intake Setup Role

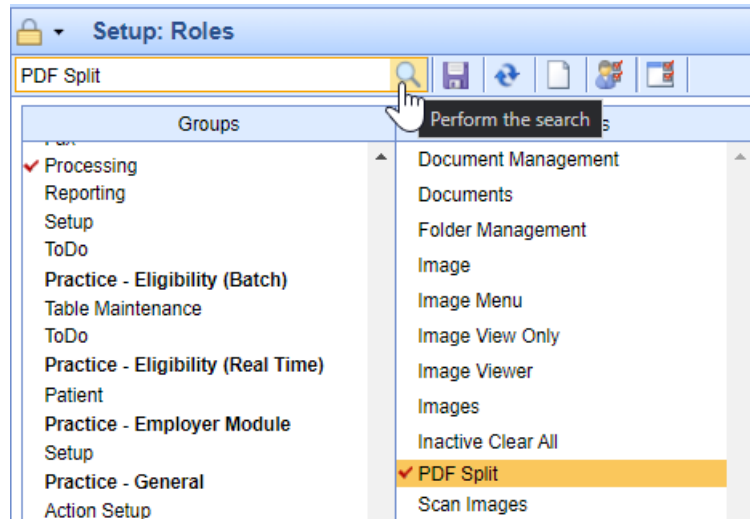
1. Click on the **Setup** portal.



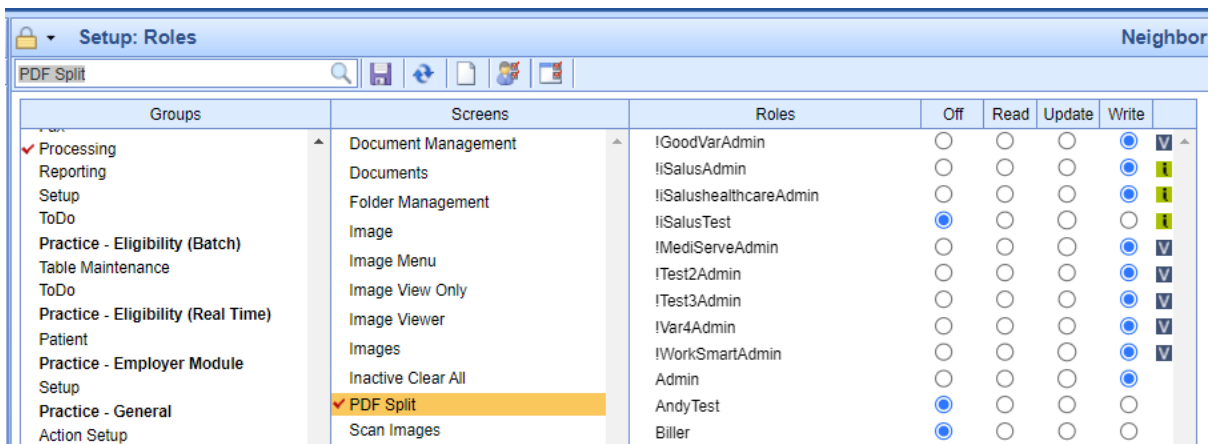
2. Select **Roles** under Administrative Setup.



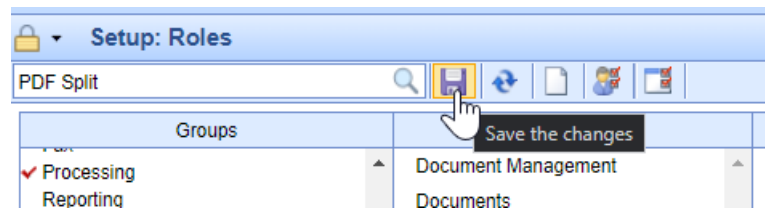
3. Type 'PDF Split' into the search box and hit the **Magnifying Glass** button.



4. Assign **Write** access to the appropriate document indexing staff & any other desired role.

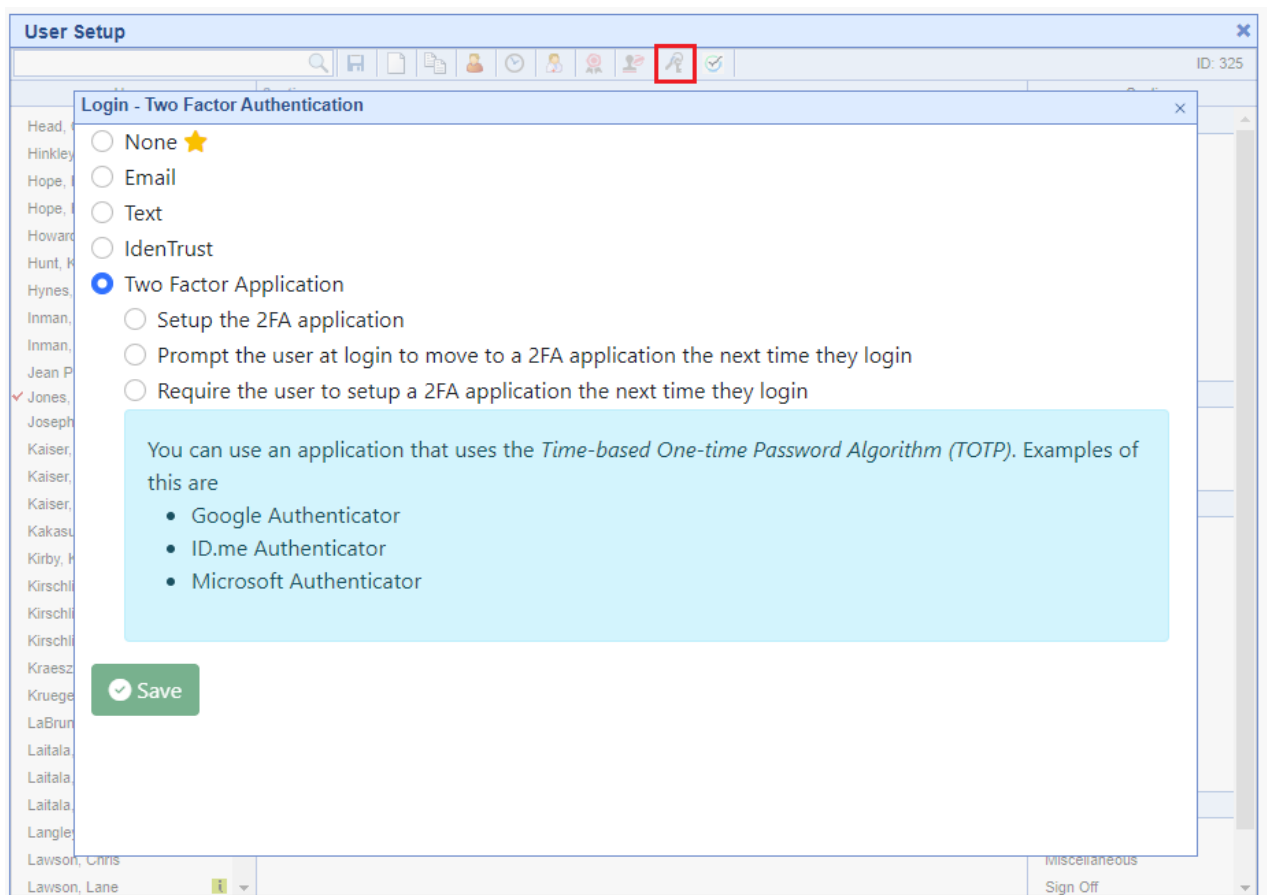


5. Press the **Save** button to save your changes.



## Practice - General - Security - User Two Factor Authentication

This article describes the enablement of access to the **Two Factor Authentication** setup screen that determines the method of authentication for the login process for an individual user. This screen is affected by the company setting **Default 2FA Setting for users**.

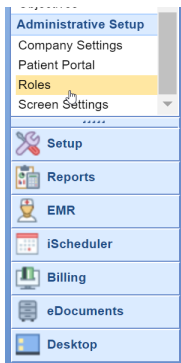


## Setup the User Two Factor Authentication Role

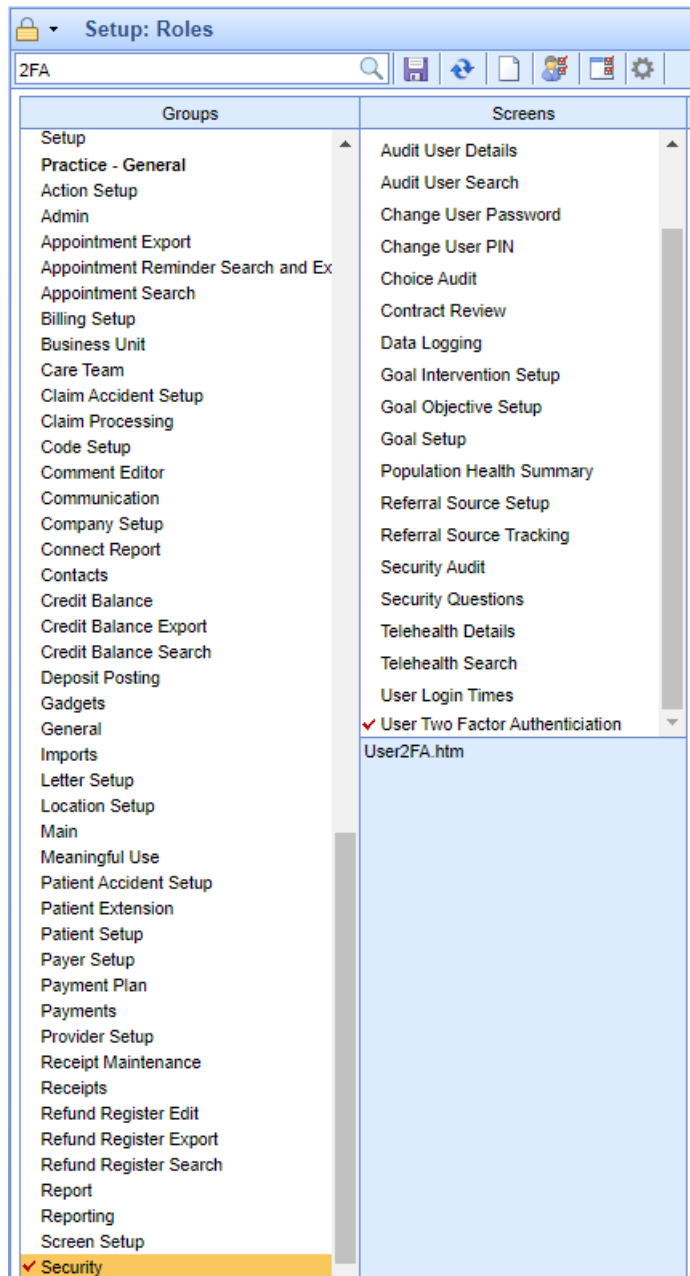
1. Click on the **Setup** portal.



2. Select **Roles** under Administrative Setup.



3. Type 2FA into the search box and hit the **Magnifying Glass** button.



4. Select the **Practice - General > Security > User Two Factor Authentication** screen. Assign **Write** access to the appropriate roles.
5. Press the **Save** button to save your changes.

2FA

Groups

EMR - ChartShareMD	Audit User Details
Chart Tabs	Audit User Search
Processing	

Save the changes

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