Create Staff Member Accounts

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Create a staff member account | Edit a staff member account

Staff member accounts have the following capabilities, which can be customized based on practice needs:

- Full access to DrChrono
- Scheduling, charting, patient information, settings, profiles, and reporting
- Signing or locking clinical notes and submitting electronic prescriptions. Staff members perform these tasks on behalf of the provider to which they are assigned. Staff members cannot sign or lock clinical notes or e-prescribe using their names.
- Billing information, access to all business intelligence tools, and submitting claims



To create staff member accounts, you must have the **Manage Accounts** permissions turned on in **Permissions Administration** (**Account > Staff Permissions > Permissions** tab).

Create a staff member account



Non-invoiced and Asclepius plan users can add three staff member accounts.

- 1. Select Account > Staff Members > Staff tab.
- 2. Select Add Staff Member.



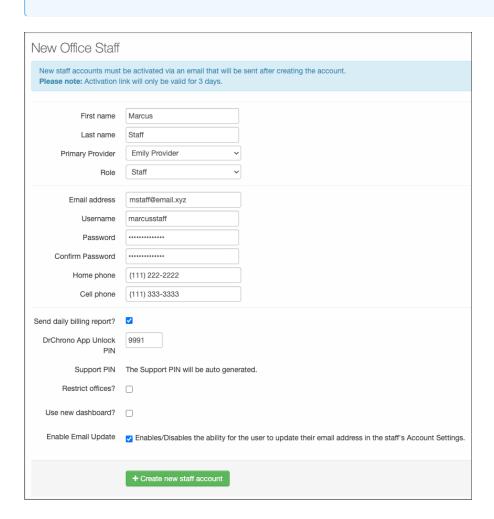
- 3. Fill out the text boxes.
- 4. Select the provider this staff member is assigned to.
- 5. Select a role.
- 6. Enter a username and password.
- 7. (Optional) Select the corresponding checkbox to turn on one of the following features (not applicable to DrChrono App Unlock PIN):

- Send daily billing report: Staff members can receive a daily billing report by email. This option is selected by default.
- **DrChrono App Unlock PIN:** A four-digit PIN is automatically generated to log in to the DrChrono EHR and Check-In apps. You can change this PIN.
- Restrict offices?: Restricts a staff member to specific offices.
- Use new dashboard?: Staff members land on the Dashboard after they log in.
- **Enable Email Update:** Staff members can update their email address in **Staff Account Information**. This option is selected by default.

8. Select Create new staff account.



Each unique username must be associated with a unique email address. Duplicate emails can't be used for login credentials.



A verification email is sent to the staff member's email address. The staff member will be shown as inactive until they activate their account using the email verification link.

9. Have your staff member select the email verification link to log in to their new account using the username and password you created for them.

Edit a staff member account

- 1. Select Account > Staff Members > Staff tab.
- 2. Select Edit.



- 3. Make your changes.
- 4. Select Save staff account.