

Create Staff Accounts

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Staff 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

Requirements

To create staff accounts, you must enable the **Manage Accounts** permission on the **Roles & Permissions** page (**Account > Practice Management > General Management > Roles & Permissions**).

Create a staff member account

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

1. Select **Account > Practice Management > General Management > Staff**.
2. Select **Add Staff** to open the **Staff Information** drawer.

The screenshot shows the 'Staff' management interface. At the top right is an 'Add Staff' button. Below it are filters for 'Active' (2), 'Pending' (0), and 'Inactive' (0). There are also search and filter dropdowns for 'Search by staff name, username', 'Role', and '2-Factor Auth'. The main table lists two staff members: Camille Nurse and Marcus Staff, both with 'Nurse (System)' roles. Each entry includes their username, email, cell phone, and primary provider, along with '2-Factor Auth' status and 'View'/'Deactivate' actions.

Staff	2-Factor Auth	Action
Camille Nurse <small>Nurse (System)</small> Username: camilles Email: hbenavente+camille@everhealthsoftware.com Cell Phone: 111-222-3333 Primary Provider: Hannah Provider	✘	View Deactivate
Marcus Staff <small>Nurse (System)</small> Username: marcusstaff Email: mstnavente+marcus@everhealthsoftware.com Primary Provider: Hannah Provider	✘	View Deactivate

3. Complete the staff information fields.
 - Enter the first and last name.
 - Select the primary provider this staff member is assigned to.
 - Select a role.
 - **(Optional)** Select a care team role (populates the staff providers in the patient chart within the

Demographics section under **Care Team**).

- **(Optional)** Enter the care team identifier - provider NPI or NCSBN ID.
- Enter a username, email address, and password.
- **(Optional)** Enter cell and home phone numbers.



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

4. Enter or turn on the staff settings.

- Enter a four-digit **DrChrono App Unlock PIN** (used to access the DrChrono EHR app after a period of inactivity).
- **(Optional) Enable email update** is turned on by default, and allows staff members to update their email address.
- **(Optional)** Turn the **Restrict Offices** setting on to restrict a staff member to specific offices. Search and select the offices from the **Office** menu.
- **(Optional)** Turn the **Send daily billing report** setting on to allow staff members to receive a daily billing report by email.

5. Select **Add Staff**.

Add Staff
✕

Staff Information

📘 New staff accounts must be activated via an email that will be sent after creating the account. Activation link will only be valid for 3 days.

First Name *	Last Name *
<input type="text" value="Annalise"/>	<input type="text" value="Staff"/>
Primary Provider *	Role *
<input style="width: 90%;" type="text" value="Hannah Provider"/>	<input type="text" value="Nurse (System)"/>
Care Team Role	Care Team Identifier
<input type="text" value="Chronic care nurse (occupation)"/>	<input style="width: 40%;" type="text" value="NCSBN ID"/> <input style="width: 40%;" type="text" value="11223344"/>
Username *	Email *
<input type="text" value="anursedemo"/>	<input type="text" value="anurse@email.xyz"/>
Password *	Confirm Password *
<input type="password" value="....."/>	<input type="password" value="....."/>
Cell Phone	Home Phone
<input type="text" value="212-222-2222"/>	<input type="text" value="212-333-3333"/>

Staff Setting

DrChrono App Unlock PIN *

Enable email update
Allow the staff to update their email

Restrict Offices

Office *

Send daily billing report

Cancel
Add Staff

An activation email is sent to the staff member's email address. The staff member will appear as pending until they activate their account using the email activation link. The activation link is only valid for 72 hours.

Staff
Add Staff

Active 5
Pending 1
Inactive 0

Staff	2-Factor Auth	Action
test staff Staff (System) Username: rmacmillan1 Email: rmacmillan+test@updox.com Primary Provider: Ryan MacMillan	✕	Resend Cancel

Showing 1 of 1 record
You have reached the end.

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

Once the staff member logs into their new account, they move from the pending staff list to the active staff list.

Staff statuses

- **Active:** Active staff accounts
 - **Pending:** Staff accounts that are pending email verification. To resend the email with the activation link, select **Resend**. To cancel staff verification, select **Cancel** and then select **Cancel Verification** to confirm. The staff member moves to the inactive list.
 - **Inactive:** Staff who have been deactivated. To reactivate their account, select **Reactivate**.
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