

# Create Staff Member Accounts

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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**.

Login	Name	Email	Primary Provider	Cell	Home	Emer Acs	2-Fac Sec*
camilles	Camille Staff	camilles@email.xyz	Kate Provider	111-222-3333		✓	Inactive <a href="#">Setup</a>

[Show inactive](#) [+ Add Staff Member](#)

3. Enter the staff member's first and last name.
4. Select the provider this staff member is assigned to.
5. Select a role.
6. **(Optional)** Select a care team role (populates the staff providers in the patient chart within the **Demographics** section under **Care Team**).
7. **(Optional)** Enter the care team identifier - provider NPI or NCSBN ID.
8. Enter a username and password.

9. **(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.

10. 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.

## New Office Staff

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

First name   
 Last name   
 Primary Provider   
 Role

Care Team Role   
 Care Team Identifier

Email address   
 Username   
 Password   
 Confirm Password   
 Home phone   
 Cell phone

Send daily billing report?   
 DrChrono App Unlock PIN   
 Support PIN The Support PIN will be auto generated.  
 Restrict offices?   
 Use new dashboard?   
 Enable Email Update  Enables/Disables the ability for the user to update their email address in the staff's Account Settings.

[+ Create new staff account](#)

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.

11. 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's account

1. Select **Account > Staff Members > Staff** tab.
2. Select **Edit** (for the specific staff member).

Providers **Staff** Groups

### Staff

Login	Name	Email	Primary Provider	Cell	Home	Emer Acs	2-Fac Sec*
camilles	<b>Camille Staff</b>	camilles@email.xyz	Kate Provider	111-222-3333		✓	Inactive <a href="#">Setup</a> <a href="#">Edit</a> <a href="#">Delete</a>

Show inactive [+ Add Staff Member](#)

3. Make your changes. To reset a staff member's password, [use the reset password procedure](#).

4. Select **Save staff account**.

### Edit Office Staff

First name	<input type="text" value="Camille"/>
Last name	<input type="text" value="Staff"/>
Primary Provider	<input type="text" value="Kate Provider"/>
Care Team Role	<input type="text" value="General nurse (occupation)"/>
Care Team Identifier	<input type="text" value="NCSBN ID"/> <input type="text" value="12345678"/>
Email Address	<input type="text" value="...@..."/> <input type="button" value="Change Email"/>
Username	<input type="text" value="camilles"/>
Password	<input type="button" value="Reset Password"/>
Home phone	<input type="text" value="( ) - -"/>
Cell phone	<input type="text" value="(111) 222-3333"/>
Send daily billing report?	<input checked="" type="checkbox"/>
DrChrono App Unlock PIN	<input type="text" value="8453"/>
Support PIN	The Support PIN will be auto generated.
Restrict offices?	<input type="checkbox"/>
Use new dashboard?	<input checked="" type="checkbox"/>
Enable Email Update	<input checked="" type="checkbox"/> Enables/Disables the ability for the user to update their email address in the staff's Account Settings.

## Reset a staff member's password

1. From the **Edit Office Staff** page, select **Reset Password**.

## Edit Office Staff

First name	<input type="text" value="Camille"/>
Last name	<input type="text" value="Staff"/>
Primary Provider	<input type="text" value="Kate Provider"/>
Care Team Role	<input type="text" value="General nurse (occupation)"/>
Care Team Identifier	<input type="text" value="NCSBN ID"/> <input type="text" value="12345678"/>
Email Address	<input type="text" value="...@... .com"/> <input type="button" value="Change Email"/>
Username	<input type="text" value="camilles"/>
Password	<input type="button" value="Reset Password"/> 
Home phone	<input type="text" value="( ) - -"/>
Cell phone	<input type="text" value="(111) 222-3333"/>
Send daily billing report?	<input checked="" type="checkbox"/>
DrChrono App Unlock PIN	<input type="text" value="8453"/>
Support PIN	The Support PIN will be auto generated.
Restrict offices?	<input type="checkbox"/>
Use new dashboard?	<input checked="" type="checkbox"/>
Enable Email Update	<input checked="" type="checkbox"/> Enables/Disables the ability for the user to update their email address in the staff's Account Settings.

A password reset link is sent to the staff member's email address, and remains valid for 72 hours.

2. The staff member selects the reset password link in their email.
3. After they are done resetting their password, the staff member must log in again with their new credentials.