Create Staff Accounts

Last modified on 10/14/2026 2:27 pm EDT

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

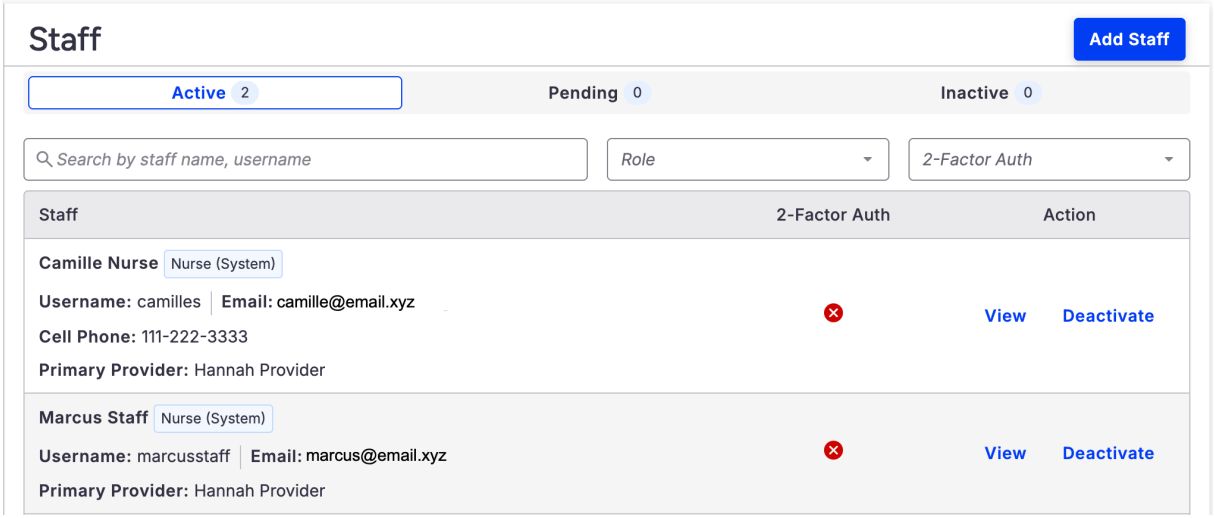
- Full access to DrChrono
- Scheduling, charting, patient information, settings, profiles, and reporting
- Signing or locking clinical notes and submitting electronic prescriptions. Staff perform these tasks on behalf of the provider to which they are assigned. Staff cannot sign or lock clinical notes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

Requirement

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

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

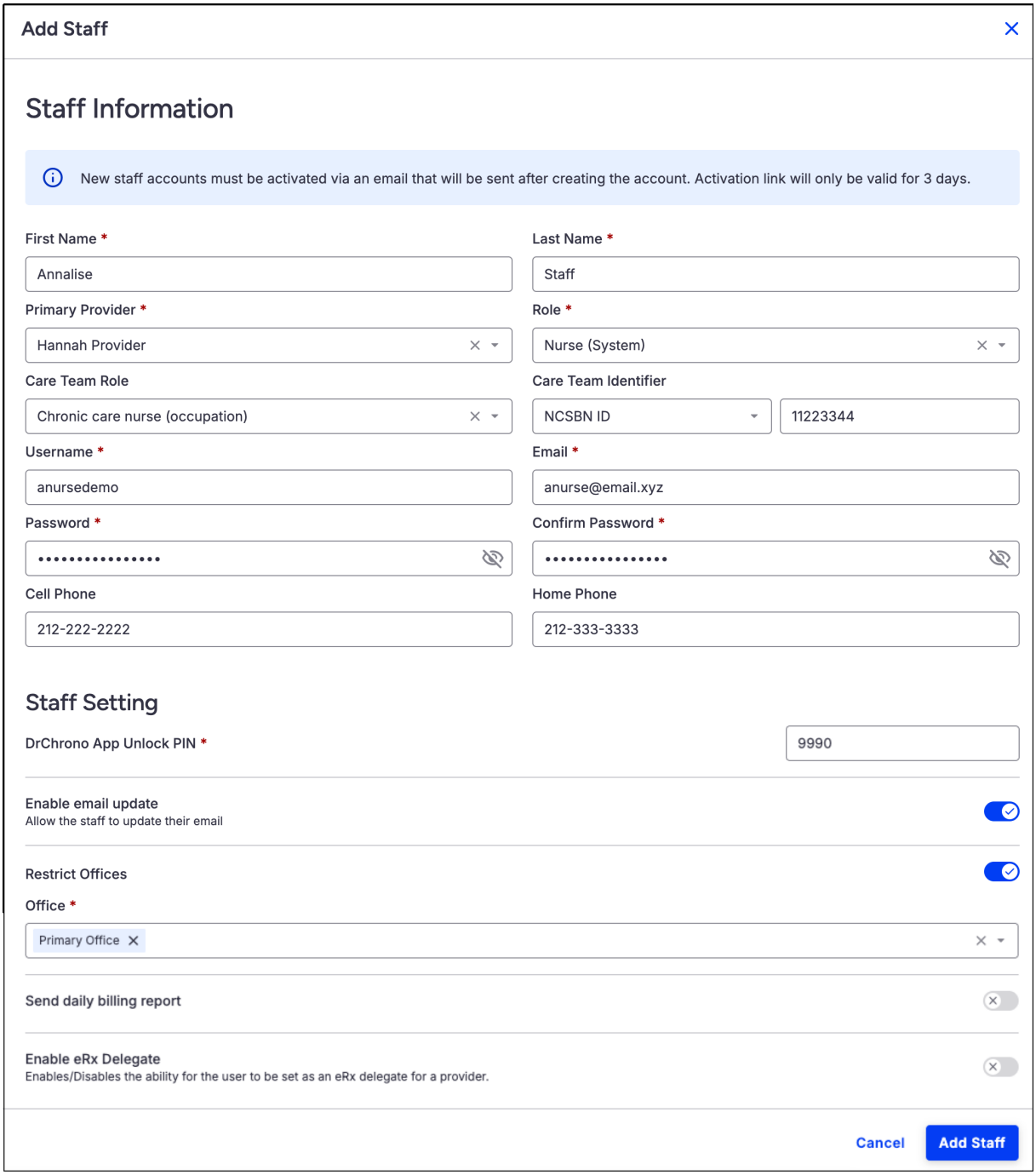


3. Complete the staff information fields.
    - Enter the first and last name.
    - Select the primary provider this staff member is assigned to.
    - Select a role.
    - **(Optional)** Select a care team role (populates the staff providers in the patient chart within the **Demographics** section under **Care Team**).
    - **(Optional)** Enter the care team identifier — provider NPI or NCSBN ID.
    - Enter a username, email address, and password.

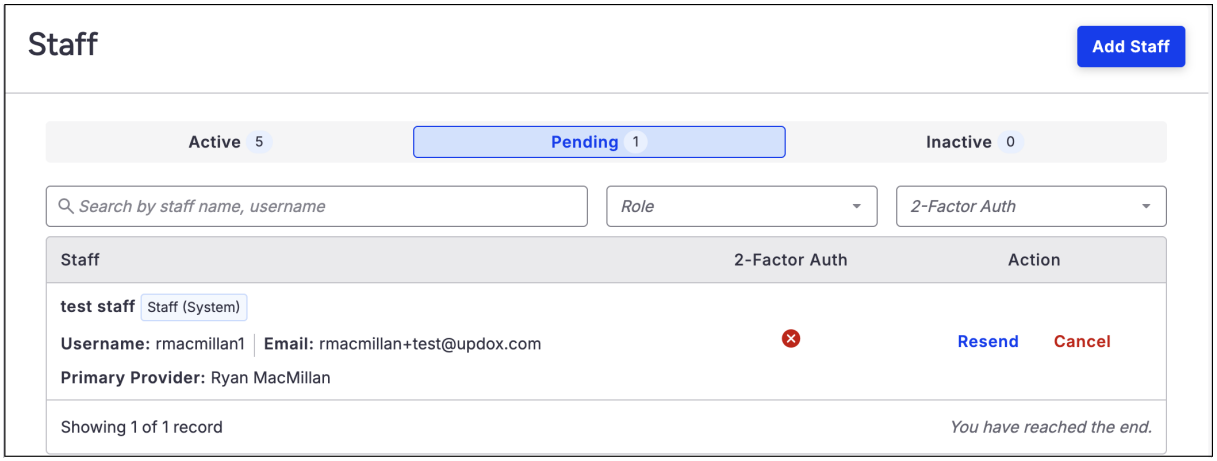
- **(Optional)** Enter cell and home phone numbers.

> 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 to update their email address.
    - **(Optional)** Turn the **Restrict Offices** setting on to restrict staff to specific offices. Search and select the offices from the **Office** menu.
    - **(Optional)** Turn the **Send daily billing report** setting on to allow staff to receive a daily billing report by email.
    - **(Optional)** Turn the **Enable eRx Delegate** setting on to allow staff to be an eRx delegate for a provider.
5. Select **Add Staff**.



The system sends an activation email to the staff member. 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.



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 in to the new account, they move from the pending staff list to the active staff list.

   Users who have the **Manage Staff** permission are notified in **Message Center** once the staff member is successfully created. If no one has the **Manage Staff** permission, the primary provider receives the alert.

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**.