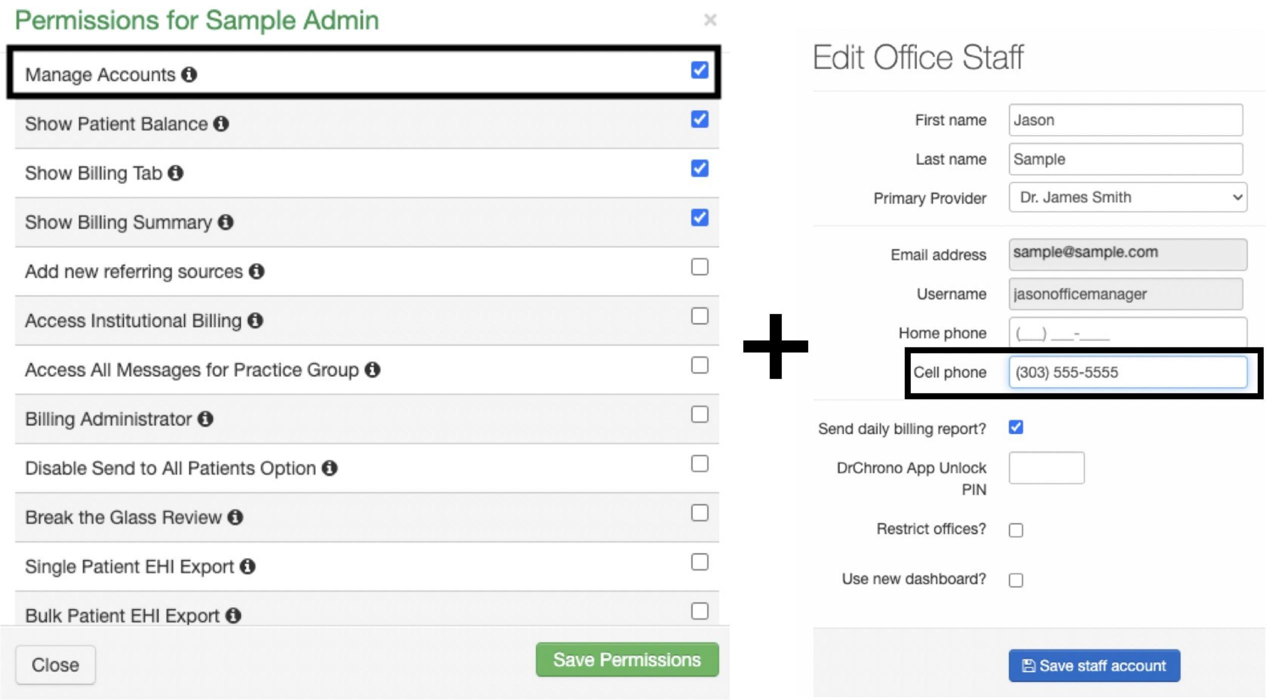
How do I set up Two-Factor Authentication (2FA) for a staff member?

07/24/2024 4:25 pm EDT

You can set up a Two-Factor Authentication (2FA) requirement for staff on your account.

As prerequisites to enable 2FA for a staff member, you must have the Manage Accounts permission enabled with your permission set, **and** the staff member for whom you are setting up 2FA must have a cell phone number under their account set up.



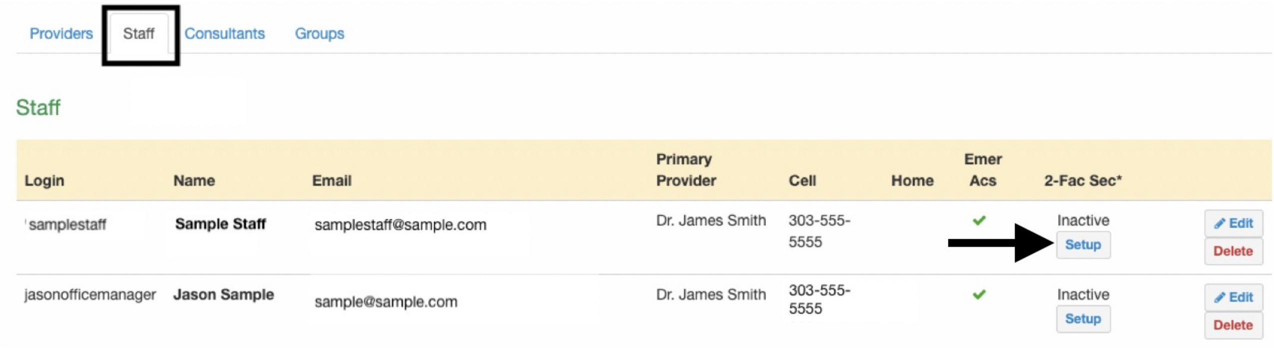
Permissions for Sample Admin

Manage Accounts	☑
Show Patient Balance	☑
Show Billing Tab	☑
Show Billing Summary	☑
Add new referring sources	□
Access Institutional Billing	□
Access All Messages for Practice Group	□
Billing Administrator	□
Disable Send to All Patients Option	□
Break the Glass Review	□
Single Patient EHI Export	□
Bulk Patient EHI Export	□

Edit Office Staff

First name	Jason
Last name	Sample
Primary Provider	Dr. James Smith
Email address	sample@sample.com
Username	jasonofficemanager
Home phone	(__) ___-____
Cell phone	(303) 555-5555
Send daily billing report?	☑
DrChrono App Unlock PIN	
Restrict offices?	□
Use new dashboard?	□

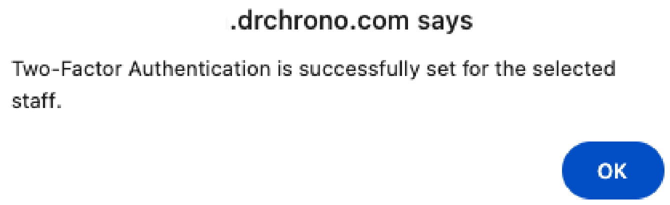
To set up 2FA for a staff member, go to **Account** > **Staff Members** and select the **Staff** tab. Click Set Up next to the staff member to set up 2FA.



Staff

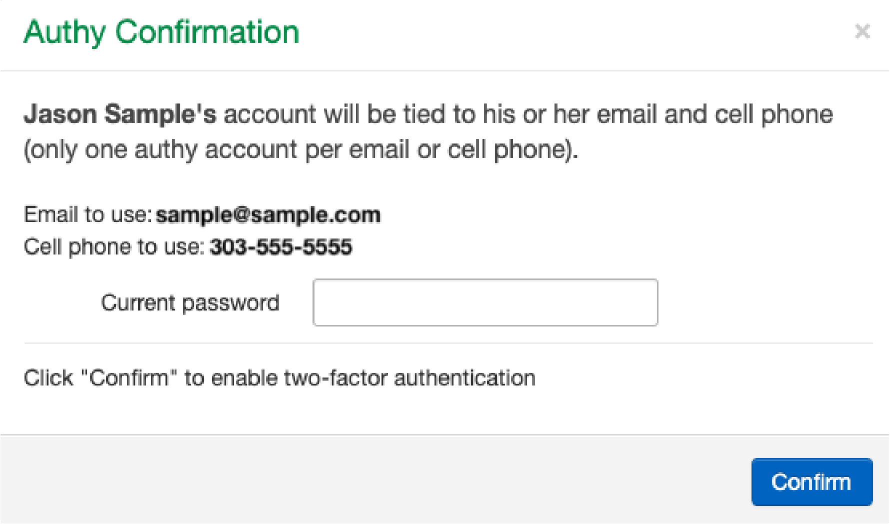
Login	Name	Email	Primary Provider	Cell	Home	Emer Acs	2-Fac Sec*	
samplestaff	**Sample Staff**	samplestaff@sample.com	Dr. James Smith	303-555-5555		✓	Inactive Setup	Edit Delete
jasonofficemanager	**Jason Sample**	sample@sample.com	Dr. James Smith	303-555-5555		✓	Inactive Setup	Edit Delete

Next, enter your password (not the password of the staff member) and click **Confirm**.


.drchrono.com says

Two-Factor Authentication is successfully set for the selected staff.

You will see a success message at the top of the screen.


Authy Confirmation

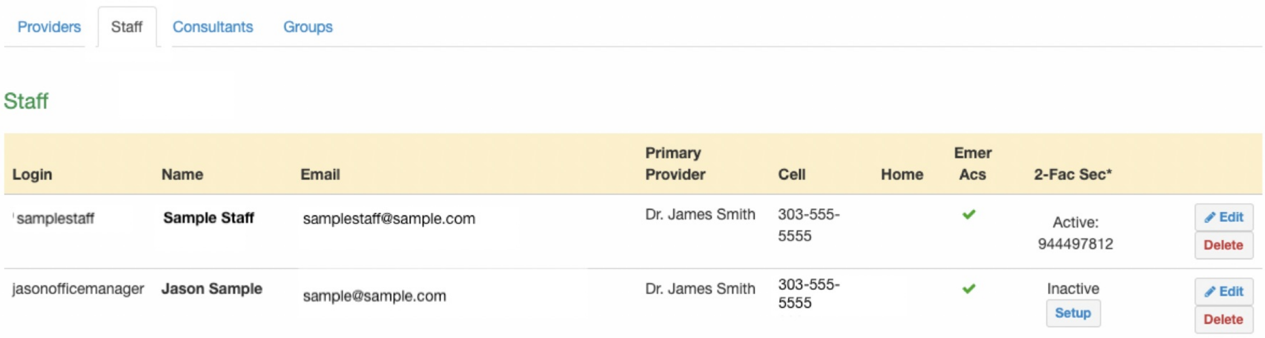
Jason Sample's account will be tied to his or her email and cell phone (only one authy account per email or cell phone).

Email to use: **sample@sample.com**
Cell phone to use: **303-555-5555**

Current password

Click "Confirm" to enable two-factor authentication

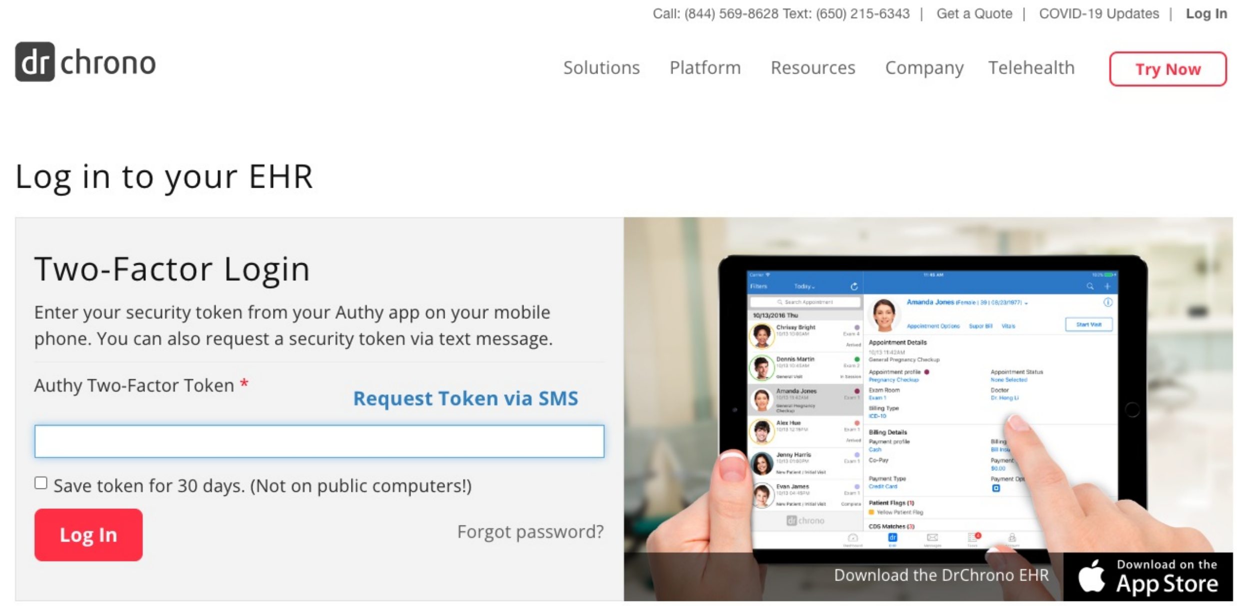
Under the **2-Fac Sec** column, you will see **Active**.



Staff

Login	Name	Email	Primary Provider	Cell	Home	Emer Acs	2-Fac Sec*	
samplestaff	**Sample Staff**	samplestaff@sample.com	Dr. James Smith	303-555-5555		✓	Active: 944497812	Edit Delete
jasonofficemanager	**Jason Sample**	sample@sample.com	Dr. James Smith	303-555-5555		✓	Inactive Setup	Edit Delete

When the user logs in, they will be prompted to enter a security code. The staff member can click **Request Token via SMS** and the code will be sent to the cell phone listed in the staff profile. Or they can set up the Authy app described in our article How do I set up 2-factor authentication in my account?



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Log in to your EHR

Two-Factor Login

Enter your security token from your Authy app on your mobile phone. You can also request a security token via text message.

Authy Two-Factor Token *

Request Token via SMS

□ Save token for 30 days. (Not on public computers!)

Log In

Forgot password?

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