Completing the Access Request Form (EHI Export Practice Level Permission Request)

07/24/2024 1:15 pm EDT

EHI Export: Overview

Creating a New Request : EHI Export

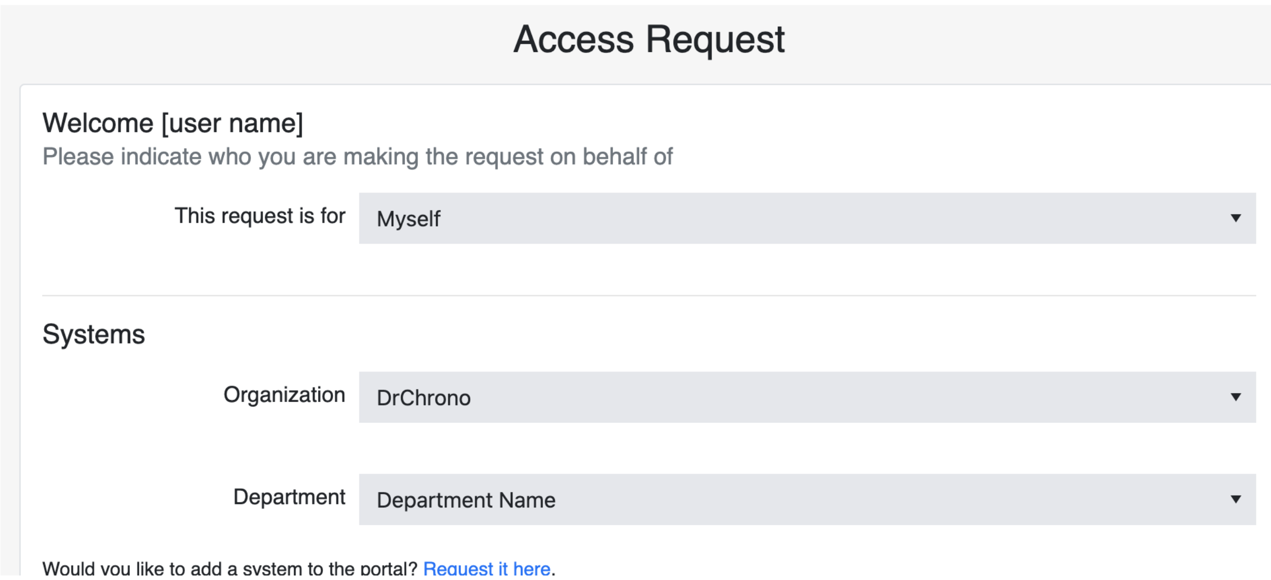
The internal workflow requires a practice level permission request to be granted.

Practice Level Permission Request

If you need permission to complete a Bulk/Practice Level export for a customer, permission will need to be requested from the Access Management Portal

From the Access Management Portal

- Indicate who you are making the request on behalf of.
- Select the organization (ie: DrChrono).
- Select the department.



- Under the System / Role columns select CRM Application: DrChrono (for system) and Data Migration- User (for role).

- Click submit request (bottom of page).
- The internal user that submitted the request via PG settings will receive an email once approved.

Note: The practice level file can be downloaded from PG Settings (internally) or the customer can download via the EHI dashboard once available.