INTERNAL: Using the Access Management Portal (AMP)

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DrChrono recently made updates to its provisioning process for DrChrono internal permissions. Previously, you would request an EC-IT ticket and specify what access in DrChrono to grant yourself or your employees, e.g., swords access, BTG, etc. You will now go through EC's Application Management Portal (AMP) to request access to internal permissions.

We've also modified our system to be a role-based provisioning system, so instead of requesting specific permissions you will request roles based on your or your employee's position/department in the company, e.g., the sales team would request the "Sales - User" and/or "Sales - Admin" roles.

Below is a list of roles for each department and what they grant:

- **Account Managers and Sales Teams:**
  - Sales - User: Sword Tools, Account Receivables Access
  - Sales - Admin: Sword Tools, View Escalations Dashboard, Unsuspend Account, Accounts Receivable Access
- **Accounting/Finance Team:**
  - Accounting/Finance: Sword Tools
- **BizDev Team:**
  - Business Development: Sword Tools, BizDev Permissions, API Access
- **Customer Support / Customer Experience Teams:**
  - CS/CX - User: Sword Tools
  - CS/CX - Admin: Sword Tools, Biller BTG
- **Data Analytics Team:**
  - Analytics - User: Sword Tools
  - Analytics - Admin: Sword Tools
- **Data Migrations Team:**
  - Data Migrations - User: Sword Tools, Modify Staff in BTG
- **Developer/Engineering Teams:**
  - Developer - User: Sword Tools, View Escalations Dashboard, Bizdev Permissions
  - Developer - Admin: Sword Tools, View Escalations Dashboard, Bizdev Permissions
- **Implementation Team:**
  - Implementation - User: Sword Tools
  - Implementation - Admin: Sword Tools, View Escalations Dashboard, Account Receivables Access
- **Product Team:**
  - Operations: Sword Tools
- **RCM Team:**
  - RCM - User: Sword Tools
  - RCM - Admin: Sword Tools, Biller BTG, View Escalations Dashboard

The **Break The Glass** permission is separated into its own role.
- **BTG Permission:**
  - BTG - DRC: Break The Glass
- Users are able to request multiple roles as needed, e.g., implementation employee needs both "Implementation - User" and "BTG - DRC."

AMP Process

You will navigate to AMP via the link provided here: https://portal.evercommerce-itgc.com/access-request.

1. You will be asked to specify who you are making the request on behalf of, the organization (DrChrono), and the Department.

2. You will then select which system and role you are requesting access to. For DrChrono this will be **CRM Application: DrChrono**, and if you also need DrChrono staging access you will select **CRM Application: DrChrono (Staging)**.

3. Select the role(s) that are relevant to you or your employee, then click 'Submit Request'. (See screenshot below)