

INTERNAL: Customer Support PIN

07/24/2024 5:40 pm EDT

Note: A support PIN will be automatically generated for the customer.

Support PIN: CRM

A new item has been added to the 2nd column of the DrChrono Sales CRM called **Support PIN**. The Support PIN will be displayed here so customer support can use this info to verify the user's identity by clicking the blue **Validate** button to the right of the Support PIN.

If the PIN matches, green text will be displayed below the Support PIN field: **The Support PIN matched.**

The screenshot displays the DrChrono CRM interface for a user profile. The user's name is Dr. Hong Li. The interface is divided into several sections:

- User Information:** Username: hongtest12345, Doctor ID: 77720, Practice Group ID: 1549, Date Joined: 08/19/2015, Last Logged in: 08/19/2015 03:46:32 p.m., Time Zone: US/Eastern, Office State: NY, Cell Phone: (917) 213-1245, Office Phone: (917) 213-1245, Email: hong+1009@drchrono.com.
- Resources:** Usage Report, Billable Entity, Process Payment/Change Plan.
- 2-Factor Security:** Inactive, Setup 2-Factor.
- Free Draw:** Inactive.
- Mayo Data:** Disabled.
- Total patients:** 0.
- Past 30 days:** 0 Faxes sent and 0 Faxes received, Doctor limit: 0 faxes, Practice group usages.
- Past 7 days:** 0 appointments created, 0 patients created.
- Past 30 days:** 0 appointments created, 0 patients created.
- All time stats:** 0 appointments, 0 patients.
- EDI Enrollments:** EDI Panel.
- Features:** Active Patient Payment [Aug. 23, 2018].
- API Usage:** API Dashboard.
- Support PIN:** Enter Customer PIN, Validate. Below the field, it says "The Support PIN matched".

On the right side, there is a "Salesforce Sync Beta" section with an "Account ID" field showing "No Salesforce account found" and a "Send to Salesforce" button.

If the PIN does not match, red text will be displayed below the Support PIN field: **The Support PIN did not match.**

dr chrono Dr. Hong Li Dr. Hong Li (hong)

Schedule Clinical Patients Reports Billing Account Marketplace Help

Search 129 +

Account ID
No Salesforce account found
[Send to Salesforce](#)

Username: hongtest12345
Doctor ID: 77720
Practice Group ID: 1549
Date Joined: 08/19/2015
Last Logged in: 08/19/2015 03:46:32 p.m.

Time Zone: US/Eastern
Office State: NY
Cell Phone: (917) 213-1245
Office Phone: (917) 213-1245
Email: hong+1009@drchrono.com

iOS beta: No
Specialty: Advanced Practice Midwife
Paid User: No
Plan Type: [Asclepius](#) (\$0.00/mo) [Upsell](#)

Fax number: [manage fax number](#)
Mmodal User: No [setup speech-to-text](#)
eRx User: Yes
EPCS User: No [setup EPCS](#)
RTE user: No [Check MU](#)
Patient Payments user: No
Premium Support: No
Free Trial: Inactive [Manage](#)

Kickoff Date:
Go-Live Date:
of Patients/week:
[Save](#)

NPS Rating:
NPS Comments:
Account balance already reviewed? No

Resources: [Usage Report](#)
[Billable Entity](#)
[Process Payment/Change Plan](#)

2-Factor Security: Inactive [Setup 2-Factor](#)
Free Draw: Inactive
Mayo Data: Disabled

Total patients: 0

Past 30 days: Faxes sent and Faxes received
Doctor limit: faxes
[Practice group usages](#)

Past 7 days: appointments created
 patients created

Past 30 days: appointments created
 patients created

All time stats: appointments
 patients

EDI Enrollments: [EDI Panel](#)

Features: Active Patient Payment [Aug. 23, 2018]

API Usage: [API Dashboard](#)

Support PIN: [Validate](#)
The Support PIN did not match

The screenshots above demonstrate how to validate for a **provider** on the CRM page, but the validation screen for **staff members** is a little different and appears as follows (scroll down to **Staff Members** section):

► **Practice Group: Hong's Practice**

▼ **Staff Members:**

Name	Username	Email	Cell Phone	Active	Last Login	2-Factor Security	Support PIN
Sam Harrington	HongTen			✓ Active	Dec. 16, 2011, 3:57 p.m.	<input type="checkbox"/> Inactive Setup 2-Factor	<input type="text"/> Validate
Michael Grouper	hong50			✓ Active	Dec. 9, 2021, 2:41 p.m.	<input type="checkbox"/> Inactive Setup 2-Factor	<input type="text" value="5555"/> Validate The PIN did not match

► **Zendesk Requests:**

Support PIN: Account Settings (Web)

A new item has been added to the **Profile** section of the Account Settings called **Support PIN**, with the subtitle: *4-digit numeric PIN for account identity verification when you contact customer support.*

The existing **DrChrono PIN** has been changed to **DrChrono App Unlock PIN** to avoid any confusion between the 2 PIN codes with the subtitle: *4-digit numeric PIN for unlocking the mobile EHR app from inactivity.*

The **Support PIN** and **DrChrono App Unlock PIN** will be obfuscated and disabled when the user enters the page.

Account Settings

Profile | General | Email | Medical Billing | eRx Info | Services | Usage | Sample Data | Security | Patient Payments

Doctor ID 415
 Practice Group ID 5085
 First Name Hong
 Last Name Li
 Specialty Family Practitioner
 Job Title
 Timezone US/Eastern
 Salutation Dr.
 Suffix
 Website
 Home Phone
 Office Phone
 Cell Phone
 Password Change Password
 DrChrono App Unlock PIN View/Edit 4-digit numeric PIN for unlocking the mobile EHR app from inactivity
 Support PIN View/Edit 4-digit numeric PIN for account identity verification when you contact customer support
 Current Plan Custom

View/Edit Button

A **View/Edit** button has been added next to each PIN code. When the user clicks on the **View/Edit** button, a modal opens and asks them to enter their password.

The PINs will not be visible if they cannot confirm their password. If they enter the correct password, this window will close and then display the PIN numbers and enable the fields on the page until they leave the page.

Account Settings

Profile | General | Email | Medical Billing | eRx Info | Services | Usage | Sample Data | Security | Patient Payments

Doctor ID 415
 Practice Group ID 5085
 First Name Hong
 Last Name Li
 Specialty Family
 Job Title
 Timezone US/Ea
 Salutation Dr.
 Suffix
 Website
 Home Phone
 Office Phone
 Cell Phone
 Password Change Password
 DrChrono App Unlock PIN View/Edit 4-digit numeric PIN for unlocking the mobile EHR app from inactivity
 Support PIN View/Edit 4-digit numeric PIN for account identity verification when you contact customer support
 Current Plan Custom

Enter Your Password

To view your PIN codes, please enter your password.

Incorrect password. Please try again.

Support PIN: Add Staff

Under **Account > Staff Account Information** a field called “Support PIN” has been added. This support PIN will be displayed in the staff list of the CRM.

Edit Office Staff

First name	Michael
Last name	Grouper
Primary Provider	Dr. Hong Li
Email address	hong+50@dr
Username	hong50
Home phone	() --
Cell phone	() --

Send daily billing report?

iPad unlock code

Restrict offices?

Use new dashboard?

[Save staff account](#)

- PROVIDER SETTINGS**
- Account Settings
- Staff Account Information
- onpatient Settings
- Custom Fields
- Copy Dashboard (Beta)
- API
- App Directory
- PRACTICE SETTINGS**
- Offices
- Facilities
- Staff Members
- Staff Permissions
- eRx Settings

Staff Account Information

First name	Michael
Last name	Grouper
Primary Provider	Martin Washington
Email address	Michael@yahoo.com
Username	mgrouper777
Home phone	555-555-5555
Cell phone	777-777-7777
DrChrono App Unlock PIN	<input type="text" value="5555"/> View/Edit
Support PIN	<input type="text" value="5555"/> View/Edit

[Save Changes](#)