

# How do I backup all of my information within DrChrono?

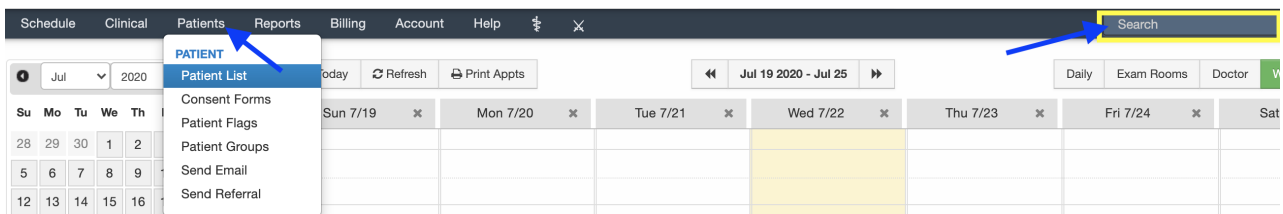
07/24/2024 3:45 pm EDT

DrChrono offers a number of ways to back up your information. You can learn how to export your patient demographics by going [here](#). There are a lot of other things that you can export and you will learn through this article.

## Additional Patient Information

A patient's medications, allergies, immunizations, and problem lists will have to be manually exported for each patient. Please follow the steps below to learn how to do this.

1. From the **Patients** drop-down, please click on **Patient List** and select the patient whose record you would like to export. Or you can use the **Search** box to look up the patient.



2. Once in the patient's file please choose **Clinical Dashboard** from the side menu.

A screenshot of a patient's Clinical Dashboard in DrChrono. The dashboard is for a patient named Laurie Sample, a 31-year-old female born on Dec 8, 1990. The dashboard includes a side menu on the left with various options like 'Demographics', 'Appointments', 'Clinical Dashboard', 'Documents', 'Eligibility', 'Tasks', 'Problem List', 'Medication List', 'Send eRx', 'Allergy List', 'Drug Interactions', 'CQMs', 'Intake Data', 'Lab Orders', 'Immunizations', 'Growth Charts', 'onpatient Access', 'Education Resources', 'Communication', 'Family History', and 'Imaging Orders'. The main content area shows patient information, including phone, address, and date added. Below this is a 'Summary of Care Provided' table with columns for Appointment, Summary of Care, Summary of Care requested and not available, and Type. The table shows an appointment on Thu Mar 10, 2022 with a description of 'CCDA, March 4, 2022' and a type of 'Transition of Care'. There is also an 'Ongoing Problems' table with columns for Problem, ICD-10-CM, ICD-9-CM, SNOMED, Diagnosis Date, Status, and Notes. The table lists several problems, including 'Anxiety disorder due to known physiological condition', 'Sucked into jet engine, initial encounter', 'Low back pain', 'Bitten by turtle, initial encounter', 'Encounter for general adult medical examination without abnormal findings', 'Bitten by dolphin, initial encounter', and 'Struck by dolphin, initial encounter'. At the bottom, there are sections for 'Active Allergies' and 'Active Medications'.

3. At the top right of the page click on **Clinical Summary** and choose **Download PDF** from the drop-down menu.

**Laurie Sample** (Female | 31 years old | Dec. 8, 1990) SAJA000001

Phone: (443) 555-5555    Email: Missing    Date Added: Jan. 4, 2022  
 Address: 328 Gibraltar Dr    Last Scheduled Appt: Fri Mar 11, 2022  
 Sunnyvale, CA 60005    Next Scheduled Appt:  
 CDS: Adult Immunization Schedule Age: 27-49

onpatient access enabled                           

Download PDF (will appear in Message Center)

- Download C-CDA XML
- Display C-CDA XML
- Customize Clinical Summary (XML or PDF)
- Send to Onpatient
- Send Direct Message

Last generated at March 11, 2022, 4:08 p.m.

**Summary Of Care Provided**

Appointment	Summary of Care	Summary of Care requested an	Type
Thu Mar 10, 2022	description: CCDA, March 4, 2022	<input type="checkbox"/>	Transition of Care

**Ongoing Problems**

Problem	ICD-10-CM	ICD-9-CM	SNOMED	Diagnosis Date	Status	Notes
Anxiety disorder due to known physiological condition	F06.4			Jan. 5, 2022, 11 a.m.	Active	
Sucked into jet engine, initial encounter	V97.33XA			Jan. 21, 2022, 10:30 a.m.	Active	
Low back pain	M54.5		279039007	Jan. 18, 2022, 3:30 p.m.	Active	
Bitten by turtle, initial encounter	W59.21XA			Jan. 31, 2022, 9:20 a.m.	Active	
Encounter for general adult medical examination without abnormal findings	Z00.00			Jan. 4, 2022, 11 a.m.	Active	
Bitten by dolphin, initial encounter	W56.01XA			Jan. 21, 2022, 10:30 a.m.	Active	
Struck by dolphin, initial encounter	W56.02XA			Jan. 21, 2022, 10:30 a.m.	Active	

**Active Allergies**

The export will include:

- Demographics
- Allergies, Adverse Reactions, Alerts
- Encounters
- Family History
- Immunizations
- Instructions
- Medications Administered
- Medications
- Insurance Providers
- Plan of Care
- Problems
- Procedures
- Lab Tests
- Results
- Social History
- Vital Signs

The contents of the PDF are the same as a C-CDA export and the information is pulled from the same sources in DrChrono. For more information see our article [here](#).

The file will be in your Message Center (



) when complete.

Schedule   Clinical   Patients   Reports   Billing   Account   Marketplace   Help   Search  

**ALL MESSAGES**

- Incoming Messages
- ★ Starred
- ☰ All Messages

**FAX**

- Incoming Fax
- ← Outgoing Fax

**Incoming Messages** ?

Mark as Read   Mark as Unread   Show Archived      Search Messages

	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated PDF: SAJA000001.pdf					March 24, 2022, 1:53 p.m.	March 24, 2022, 2:39 p.m.

Click on the file to view it. From here you can print or download the file.

Reports Billing Account Marketplace Help 1 / 12 100% Patient Health Summary

### Patient Health Summary

<b>Patient</b>	Laurie Sample		
<b>Date of birth</b>	December 8, 1990	<b>Sex</b>	Female
<b>Race</b>	Unknown Unknown	<b>Ethnicity</b>	Unknown
<b>Contact info</b>	Primary Home: 328 Gibraltar Dr Sunnyvale, CA 60005, US Tel (Cell): (443) 555-5555	<b>Preferred Language</b>	Information not available
		<b>Patient IDs</b>	SAJA000001 2.16.840.1.113883.3.7621
<b>Document Created</b>	March 24, 2022, 13:53:10, EST		
<b>Care provision</b>	from January 4, 2022, 09:37:00, EST to March 24, 2022, 13:53:10, EST		
<b>Performer (primary care provider)</b>			
<b>Author</b>			
<b>Contact info</b>	225 Schilling Circle Hunt Valley, MD 21031, US Tel (Work Place): 410-555-5555		
<b>Document maintained by</b>			
<b>Contact info</b>	Work Place:		

If you needed to export Immunizations separately, go to the **Immunizations** section of the patient's chart. Click on **Print Immunization Record**.

+ Add new patient

- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 6
- Problem List 7
- Medication List 6
- Send eRx
- Allergy List NKDA
- Drug Interactions 5
- CQMs
- Intake Data
- Lab Orders
- Immunizations

**Laurie Sample** (Female | 31 years old | Dec. 8, 1990)

Phone: (443) 555-5555    Email: Missing    Date Added: Jan. 4, 2022

Address: 328 Gibraltar Dr, Sunnyvale, CA 60005    Last Scheduled Appt: Fri Mar 11, 2022

Next Scheduled Appt:

CDS: [Adult Immunization Schedule Age: 27-49](#)

onpatient access enabled
New Referral
Fax Demographics
Print Demographics
Download HL7 Immunization Record
Print Immunization Record

#### Immunizations

Step 1: Select Vaccines    Step 2: Review and Sign    Step 3: Record Vaccinations

Print Immunization Record

##### Step 1. Select Vaccines

Birth - 2 years
2 - 18 years
Adult
Other

Schedule	Vaccine	Cvx Code	Consent Form	VIS	Administ On
Recurring	FLU	Influenza, high dose seasonal	<a href="#">View</a>		3/24/22
Recurring	Td				

From here you can print or download the Immunization Record.

Immunization Records | DrChrono 1 / 1 | 100% + | [Print] [Share]

### Immunization Records

Primary Provider:      Provider's Phone: (443) 555-5555      Date: 03/24/2022  
 Patient Name: Laurie Sample      Date of Birth: December 8, 1990      Patient ID: SAJA000001

Influenza (yearly)								
Type	Manufacturer	CVX	Amount	Date Given	Administered By	Next Dose Date	Lot	Site
Influenza, high dose seasonal	None	135	unknown	03/24/2022	Ordered by: Dr. James Smith		#: None Expiry:	LA
Other								
Type	Manufacturer	CVX	Amount	Date Given	Administered By	Next Dose Date	Lot	Site
COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose	None	208	unknown	03/24/2022	Ordered by: Brendan Wilberton		#: None Expiry:	LA

Powered by drchrono

## Billing

You are able to export your HCFA forms as a PDF for each patient, or all at once. It is recommended you do one patient at a time, so it makes it easier to attach it to a patient's file. The exported HCFA forms will appear in your message center.

Please go to the **Billing** drop-down and click on **Lives Claims Feed**.

**Billing** Account Help [Rx] [X]

- BILLING**
  - Billing Summary
  - Live Claims Feed**
  - Patient Payments (Beta)
  - Day Sheet
  - Transactions
  - Remittance Reports
  - Unmatched ERAs
  - Accounts Receivable
  - Patient Statements
  - Product/Procedure
  - Patient Balance Ledger
  - Fee Schedule
  - Underpaid Items
  - Adjustment Master
  - Sales Tax
  - Billing Log
- BUSINESS INTELLIGENCE**
  - Denial Analysis 2.0
  - Payment Analysis 2.0
- CODING**
  - Code Search
  - New Custom Procedure
  - Custom Procedures
- ENROLLMENTS**
  - Bulk Edit Payer IDs
  - Insurance Setup
  - Payer Search

**Note:** You are only able to select 50 appointments at a time. For example, if you have 5000 appointments you will need to export them 100 times and change the filter criteria each time.

Here, please enter your search criteria, and select **Update Filter**. You have multiple options to print under the **Export to File** menu when you click on the (



) icon next to the **Export to File** button.

Note: Clicking directly on the **Export to File** button to the left of the (



) Print HCFA options will only export out the details of the claim in a CSV file, and not the line items that you would get when you print out the entire form.

Live Claims Feed

Select All Offices | Select None | Office 1 All | Office 2 All | Office 3 All | Office 4 All

Claim St: All | Billing St: All | Appt Profiles: All | Calculate Counts | What's this? | TFL Warning

Promo Code

Patient: [dropdown] | Payer Name: [dropdown] | Payer ID: [input] | drc claim #: [input] | 02/01/2021 - 03/24/2022 | Clinical Note: [dropdown]

Open window in new tab  | Check All | Clear | **Update Filter**

Batch Status Change | **Export to File** | Custom Export | Display | Schedule | Internal

Info	Claim ID	Patient	Supervising Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status
<b>Totals:</b>				\$1,210.00	\$1,210.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,210.00	\$0.00	\$1,210.00	\$50.00				
<input checked="" type="checkbox"/>	204685548	Laurie Sample 3/11/2022 08:10AM	Office 1	\$146.00	\$146.00	\$0.00	\$0.00	\$0.00	\$0.00	\$146.00	\$0.00	\$146.00	\$0.00	United HealthCare	Not Submitted		
<input checked="" type="checkbox"/>	204980904	Laurie Sample 3/10/2022 03:15PM	Office 1	\$276.00	\$276.00	\$0.00	\$0.00	\$0.00	\$0.00	\$276.00	\$0.00	\$276.00	\$0.00	United HealthCare	Not Submitted		

You can change the billing status if needed. Select **Print**. You will see a message in the top left corner.

**Print HCFA**

And change billing status to: -- Not Changed --

**Print**

Exporting... When complete, you will see exported data in Message Center.

Billing Summary | Live Claims Feed

Once the forms are generated they will show up in your Message Center (



), and from there you will be able to attach them to a patient file or view the document. If you choose to view the document, you will be able to print it out or save it to a file without having to assign it to a specific patient file.

Billing | Account | Marketplace | Help | Search |

Back to Messages | Mark as Unread | Archive Message | Print | Fax | Search Messages

**Generated PDF: hcfa\_forms\_03\_24\_2022.pdf** | Create task

From: drchrono | Thursday, March 24, 2022 3:19 PM

Save Attachment to Patient Chart | View Document | Audit Log

Notes

Rotate all pages | Clockwise | Counter Clockwise

205858\_b0d4590e-d239-4631-9574-d0d5ebb8eccf.pdf | 1 / 13 | 100%

**HEALTH INSURANCE CLAIM FORM**

UNITED HEALTHCARE  
FO BOX 30555  
SALT LAKE CITY, UT 84130-0975

1. MEDICARE MEDICAID TRICARE CHAMPVA GROUP HEALTH PLAN OTHER 123456789

2. PATIENT'S NAME (Last Name, First Name, Middle Initial) Sample, Laurie

3. PATIENT'S BIRTH DATE 12/08/1990 M

4. INSURED'S NAME (Last Name, First Name, Middle Initial) Sample, Laurie

5. PATIENT'S ADDRESS (No., Street) 328 Gibraltar Dr

6. PATIENT RELATIONSHIP TO INSURED Spouse

7. INSURED'S ADDRESS (No., Street) 328 Gibraltar Dr

8. RESERVED FOR NUCC USE

CITY Sunnyvale STATE CA ZIP CODE

You are also able to export all appointments with CPT and ICD-10 details.

Please go to **Reports > Advanced Report** and select **Custom Export**. Please ensure the **Appointments** tab is selected.

## Advanced Report

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

No filters selected

Filter by patient only | Archived exam rooms Include | Breaks Excluded | Show 50 per page Update Filter Save Filter

Send Email Create Patient Group Export to File

Date of Service	Quick Export	Provider	Office	Examroom	Appt Status
Mar 17, 2022 1:50:00 PM	Custom Export	Dr. James Smith	Office 1	Exam 1	

Select the data you would like to include in your report under both the **Patient** and **Appointment** tabs. Codes are under the Appointment Filters. You can also use the **Check All** option to include all of the filters. You can name your report if needed. Click **Export** when finished.

Custom Export

Report Name: Advanced Report

Patient (17) Appointment (23) Clinical Note Doctor

Check All Uncheck All

Full Name  Mailing Zip Code  Emerg Contact Phone

First Name  Date of First Appointment  Emerg Contact Relation

Last Name  Date of Last Appointment  Referring Doctor

Chart ID  Date of Next Appointment  Ref Dr. Email

Date of Birth  Primary Ins Payer  Ref Dr. Phone

Primary Provider  Primary Ins Payer ID  Ref Dr. Fax

Home Phone  Primary Member ID  Ref Source

Cell Phone  Primary Ins Plan Name  Employer

Office Phone  Primary Ins Group #  Employer Zip Code

Email  Secondary Ins Payer  Employer Address

Close Export

Custom Export

Report Name: Advanced Report

Patient (17) Appointment (23) Clinical Note Doctor

Check All Uncheck All

Claim ID  Primary Insurer Paid  Created Time

Date of Service  Secondary Insurer Paid  Appointment Flags

Office  Primary Insurer Status  Temperature

Examroom  Secondary Insurer Status  Pulse

Provider  Patient Paid  Blood Pressure Systolic

Appt Profile  Insurance Balance  Blood Pressure Diastolic

Appt Status  Patient Balance  Respiratory Rate

Reason  Expected Reimbursement  Oxygen Saturation

Billed Time  First EDI Date  Height

Billing Status  Last EDI Date  Weight

Close Export

The report will generate in your Message Center (



).

Billing Account Marketplace Help Search

Back to Messages Mark as Unread Archive Message Search Messages

Generated Sheet: Advanced Report.zip

From: drchronon Thursday, March 24, 2022

Save Attachment to Patient Chart Download Document Audit Log

If you would like to search for non-specific ICD-10 and CPT/HCPCS appointment information you are able to do that by going to **Reports > Appointment Report**.

**PRACTICE REPORTS**

- Account / User Report
- Productivity Report
- Reminder Report
- Outgoing Prescriptions
- Patient Insurance Authorization
- Appointment Report**

Enter the search criteria to find what you are looking for. When you have entered in your search criteria select **Update Filters**.

Appointment Report

**Appointment Status** Check All Uncheck All

- Arrived
- Auto Accident
- Cancelled
- Checked In
- Checked In Online
- Checked Out
- Complete
- Confirmed
- In Room
- Needs Supervising
- No Show
- Not Confirmed
- Read for Clinician
- Ready for Dictation
- Home
- In Session
- Rescheduled
- Televisit
- Transfer
- Waiting for lab results
- DND
- None


**Billing Status** Check All Uncheck All

- Paid In Full
- Settled
- Bill Insurance
- Bill Secondary Insurance
- Worker's Comp Claim
- Auto Accident Claim
- Durable Medical Equipment Claim
- Analyst Review
- Ready To Bill
- Write off
- Balance Due
- Internal Review
- Authorization Requested
- Don't submit to insurance
- Authorization Received
- Mailed Claim
- Eligibility Confirmed
- Chrono Appeal
- Chrono Audit
- Coding Clarification
- Coding Clarified
- Coding Completed
- Insurance Payment
- Faxed/Mailed Claim or Appeal
- Internal Coding Review
- Patient Contact
- Pending Info Practice
- Pending Statement Approval
- Ready To Code
- Ready for Statement
- Specialist Review
- In Process w Payer
- Paid not Posted

Patient Search  All Offices  All Rooms  03/17/2022 - 03/24/2022 **Update Filters**


Show ICD9/ICD10 and CPT/HCPCS information

Export to File

Once you have successfully found the information you are looking for, choose the **Export to File** button. The report will then be sent to your Message Center (  ) as a .CSV file for you to save how you see fit.

Billing Account Marketplace Help Search

[Back to Messages](#) Mark as Unread Archive Message Search Messages

 **Generated Sheet: appointment\_report\_03\_24\_2022.csv** Create

**From:** drchronon **Thursday, March 24, 2022**

[Save Attachment to Patient Chart](#) [Download Document](#) [Audit Log](#)

Notes

+ Add

Date of Service	Doctor	Patient	Cell Phone #	Home Phone #	Office Phone #	Email	Office	Examroom	Appointment Status	Billing Status
2022-03-17 13:50:00	Dr. James Smith	Jenny (Jen) Harris	(650) 215-8343	(844) 569-8628			Office	Exam 1		