Account Settings in Detail

07/24/2024 11:59 am EDT

Your DrChrono account comes with a series of settings that allow you to adjust and customize how you interact with your DrChrono account. This article will give an overview of the settings under each tab.

Acco	ount Se	etting	S						
Profile	General	Email	Medical Billing	eRx Info	Services	Usage	Sample Data	Security	Patient Payments

The Settings section is divided into ten tabs that handle different setting groups. In this article, you can click on the setting in the table below to jump to a specific tab.

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

Account Settings can be found under Account > Provider Settings.



To save your settings changes in any of the tabs, click **Update Entire Profile** at the bottom of the page.

Profile

The profile tab is designed for providers to input basic information for the account. This information will populate different areas of DrChrono.

You can upload a profile picture and business logo. Learn more about uploading your logo and profile picture.

How to upload a Profile Image and Business Logo

Account Settings		
Profile General Email Medi	cal Billing eRx Info Services	Usage Sample Data Security Patient Payments
Doctor ID	248094	
Practice Group ID	239636	
First Name	James	Changing your name can affect drug prescriptions & clinical notes. If you need to change your name, please contact DrChrono
	support for more details.	
Last Name	Smith	
Specialty	Family Practitioner ~	
Job Title	Provider/Staff (Private Practice ~	
Timezone	US/Mountain ~	
Salutation	Dr. ~	
Suffix		
Website	http://www.drchrono.com]
Home Phone]
Office Phone	(443) 555-5555	
Cell Phone	(410) 555-5555	
Password	A Change Password	
drchrono PIN	••••	4-digit numeric pin for unlocking iPad EHR from inactivity
Current Plan	Apollo	
Profile Images		
Profile Picture	Choose File No file chosen	Will be attached to patient emails
Practice Business Logo	Choose File No file chosen	Will be attached to emails & official forms
Display logo on faxes	Display business logo on fax cover s	sheet

General

The settings under the General tab are divided into calendar, appointment, Meaningful Use, clinical notes, patient vitals, and communications.

Calendar Settings

Calendar Settings

Display flag icon on appointment	 Display Flag icon on appointments w 	hen a patient/appointment has flag(s) associated	
Display lock icon on appointment	Display Lock icon on appointments v	when the clinical note is locked	
Use new dashboard homescreen	 Uncheck to go straight to the calend 	ar after logging in	
Show user satisfaction survey	Uncheck to opt out of user satisfaction	on surveys.	
Default Office	Office 2 ~	Default Office on Calendar	
Duration of Exam	30	Default duration of an exam in minutes	
Duration of Follow-up	15	Default duration of a follow-up exam in minutes	
Examroom Calendar Increments	10 ~	Adjust minute increments on calendar	
Date range on Appointment Template	If true date range can be set for Appointment Template (starting from - ending by).		
Appointment Templates in more views	Show appointment templates in Daily View, Doctor View and Weekly View		
Allow Exam Room Overlaps	Allow appointments to overlap within	an exam room	
Global Overlap Checking	Disallow overlapping appointments in	n any office or exam room	
Appointment Default Color			
Phonetic Name		Used by automated phone system to pronounce doctor's name	
Hide cancelled appointments	Don't show cancelled appointments on appointment calendar (web only).		
Hide rescheduled appointments	 Don't show rescheduled appointments on appointment calendar (web only). 		
Duplicate appointment warning	Display a warning if a duplicate appointment is being created for a patient on the same day		

Setting	Description
Display Flag Icon on Appointment	Displays a lock or flag icon to show when a clinical note is locked or when a patient has flags on the calendar view.
Display Lock Icon on Appointment	
	What do the lock and flag icons on my appointments mean?
Use New Dashboard Homescreen	
	When you log in to DrChrono you can be taken to the
	calendar or the dashboard with this setting.
	Learn more about the dashboard here.
Show User Satisfaction Survey	Allows you to opt in or out of receiving user satisfaction
	surveys.
Default Office	The default office sets the office for the provider's
	contact information that will appear on documents like
	the referrals and CCDA.
Duration of Exam	Sets the default appointment duration when scheduling
	an appointment for the provider.
Date range on Appointment Template	
	Allows you to set a start date and end date for the
	appointment templates on your calendar.
	How do I add a date range to my appointment templates?
Appointment Templates in More Views	
	Allows you to have appointment templates appear in all
	calendar views with the exception of monthly.
	Enabling Appointment Templates in All Calendar Views

Allow Exam Room Overlaps	
Allow Exam Room Overlaps	Allows you to schedule appointments in the same exam
	room at the same time.
	i oom at the same time.
	How do I schedule multiple appointments in the same
	exam room at one time?
Global Overlap Checking	
Global Overlap Checking	This setting will not allow appointments to be double-
	booked in any exam room or office. If you do not want
	any double bookings at all, enable this setting.
	Enabling or Disabling Overlapping Appointments
	Enabling or Disabling Overlapping Appointments
Appointment Default Color	Sets a default appointment color of your choice for this
	provider's appointments
	How can be hange the default appointment color?
	How can I change the default appointment color?
Phonetic Name	Allows you to set the pronunciation of your name for
	reminders.
	reminders.
	How do I change the pronunciation of my name in
	appointment reminders?
Lide Canadad Annaintmente	Enchle this setting to hide several dand use he duled
Hide Canceled Appointments	Enable this setting to hide canceled and rescheduled
Lide Descheduled Appeintments	appointments from the calendar.
Hide Rescheduled Appointments	
	Hiding Canceled and Rescheduled Appointments from
	the Schedule
Duplicate Appointment Warning	
	With this setting enabled you will get a warning window
	for appointments being scheduled for the same patient
	on the same day.
	Duplicate Appointment Warning

Appointment Settings

Appointment Settings

Setting	Description		
Auto-Run Eligibility	How many days before the appointment an eligibility check should be run. If blank, no eligibility check will be run.		
Limit patient flags to appointment	Show relevant flags related to current appointment.		
Auto Appointment Reminders	Enable to automatically choose the patient's most recent reminders when scheduling appointments		
Matched CDS Rules	Show patient's matched CDS rules.		
Appointment Count	Show patient's appointments count.		
Patient's Flag	Z Show patient flag.		
Patient's Insurance	Show patient's insurance payer.		
Claim's Billing Information	Show claim's billing information.		
Patient's Current Balance	Show patient's current balance.		
Patient's Statement Balance	Show patient's statement balance.		
Access to online scheduling	Allows patients to self-schedule appointments via onpatient		

Access to Opling Schoduling	
Access to Online Scheduling	This setting allows patients to schedule online through OnPatient or the scheduling widget.
	Enabling Online Scheduling in Your Office
Patient's Statement Balance	Allows you to display the patient's balance as a flag in the appointment window and generate a statement if needed.
	Schedule Appointment Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper Type Appointment Video Visit Quarter in Transition of Care Referral Patient Statement Balance: Video Visit Credit: S115.00 121 past appointments Primary Insurance: United HealthCare (87726) Secondary Insurance: PAI California Secondary (PMX02) PFall Riak: Primary Insurance: Video Visit Pail Riak:
Patient's Current Balance	Allows you to display the patient's current balance as a flag in the appointment window.
	Schedule Appointment Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MUI Helper Type @ Appointment \Video Visit \Video Visit \mathrmathinon of Care Reternal Patient Statement Balance: \$110:00 Careerste Statement credit: \$115:00 121 past appointments Primary Insurance: United HealthCare [81726] Becondary Imaurance: PAI California Secondary [PAU2] P Fail Riak: Primary Insurance: United HealthCare [81726]
Claim's Billing Information	Displays the billing information for claims in the billing tab of the appointment window.
	Schedula Appointment Balling Eligibility Vials Growthcharts Flags Log Comm. Revisions Custom Data MU Helper Pattert SuperBill Olinical Note Billing Datalis Other Forms* Pattert SuperBill Olinical Note Billing Datalis Other Forms* Pattert SuperBill Olinical Note Billing Datalis Other Forms* Pattert SuperBill Inicial Note Billing Datalis Other Forms* Pattert Represet Inicial Note Billing Parties Other Acadeett Pattert Represet Inicial Note Inicial Note Inicial Note Pattert Represet Inicial Note Inicial Note Inicial Note Billing Parties Inicial Note Inicial Note Inicial Note Billing Parties Inicial Note Inicial Note Inicial Note Other Date Type Other Date Type Other Date Type Inicial Type - v Other Date Type Other Date Inicial Type - v V Other Date The Date Type Other Date Inicial Type - v V Other Date Stother Stothet Ether Stothet <
Patient's Insurance	Shows flags in the appointment window for the patient's insurance.
	Schedule Appointment Appointment Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper Type @ Appointment Video Visit Valik-in Transition of Care Referral Patient Statement Extended Statement Credit: \$115.00 121 past appointments Primary Insurance: United HealthCare [07726] Secondary Insurance: PAI California Secondary [PM02] Fail Riak: Patients Primary Insurance: United HealthCare [07726]
Patient's Flag	Allows you to display patient flags in the appointment window.
	Patient Flags

Appointment Count	
	Allows you to view the number of past appointments the
	patient has had as a flag in the appointment window.
	patient has had as a hag in the appointment window.
	Schedule Appointment
	Appointment Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper
	Type Appointment Video Visit Walk-in Transition of Care Peterral
	Patient Statement Balance: \$410.00 Generate Statement Credit: \$115.00 121 past appointments Primary Insurance: United HealthCare [87726]
Matched CDS Rules	Secondary Insurance: PAI California Secondary (PAI/02) PF Fail Risk:
	Enable this setting to view flags based on Clinical
	Decision Support rules.
	Decision Support rules.
	CDS Rule Flags in the Appointment Window
Auto Appointment Reminders	With this setting enabled the patient's most recent
	reminders will be automatically selected as the outgoing
	reminders for this appointment.
Limit Patient Flags to Appointment	
	With this setting enabled, only flags associated with the
	current appointment will be displayed in the
	appointment window.
	How do I add a patient flag to an appointment?
	now do nadu a patient hag to an appointment:
Autorun Eligibility	Allows you to enter a number of days to autorun
	eligibility before an appointment.
	Save Time with Auto Eligibility Checks

Meaningful Use

Meaningful Use	
Severity Level of Interventions All ~	Display the drug-drug, drug-allergy interaction when severity level is higher than or equal to
Gender & Identity Dender & Identity dropdowns for	DrChrono web and onpatient/check-in applications
Setting	Description
Severity Level of Interventions	Allows you to choose the severity level to display drug-
	drug and drug-allergy interactions.
Gender and Identity	
	Allows you to display or hide the dropdown menus for
	Gender and Identity in the patient chart, OnPatient
	check-in, and the check-in app.
	Adding Gender Identity and Sexual Orientation to the
	Check-In App

Clinical Notes

Clinical Notes

?

Setting	Description
Supervising Provider	* Can sign other provider's notes. Not editable by customer. Please contact support if you want to change this flag.
Preview Previous Note	Show the information that will be copied from a previous note in the selection screen.
Allow Chief Complaint to be Persistent	
Hide CPT & ICD on Clinical Notes by Default	
Hide Medications & Allergies by Default	
Default to CDC Growth Charts	
Move Non-SOAP FreeDraws to End	
Reduce Header and Footer Font Size	
Include Lab Orders and Results	Show Lab Orders and Results in the plan section of clinical notes
Include Payer IDs	Include primary and secondary payer IDs in the headers of clinical notes
Include Office Information	Include office name and address in the headers of clinical notes
Include Patient Chart Photo	
Include Business Logo	Top Left ~
Include Practice Official Name	Print practice official name in header. Name can be set in "Medical Billing" Tab

Setting	Description
Include Practice Official Name	Adds the practice name from the medical billing tab on
	the clinical note. (See below)
Include Business Logo	Allows you to add your business logo to the top of the
	clinical note. (See below)
Include Patient Chart Photo	Includes the patient's profile photo from their chart on
	the clinical note. (See below)
Include Office Information	Adds the office information to the clinical note header
	(See below)
Include Payer IDs	Add the patient's primary and secondary payer IDs to the
	clinical note. (See below)



Family Practice



 Patient: Laurie T. Sample
 DOB: 12/08/1990

 Provider: Dr. James Smith
 Visit: 06/09/2023

 Office: Office 2
 Address: 345 Fa

 Primary Payer ID: 87726
 Secondary Pay

 DOB:
 12/08/1990
 Sex:
 F

 Visit:
 06/09/2023
 8:00AM
 Chart:
 SAJA000001

 Address:
 345
 Fake
 Street,
 Baltimore,
 MD,
 12345

 Secondary Payer ID:
 PAI02
 PAI02
 PAI02
 PAI02
 PAI02

Clinical Note Settings Continued

Include Lab Orders and Results						
	Allows yo	ou to show	w lab ord	ers and r	esults in t	he plan
	section o	f the note	2.			
	Plan:					
	Lab Results:					
	Test	Normal Range	2023-03-28	2022-03-31	2022-02-24	2019-04-04
	LOINC 11502-2 Laboratory report	8-12	-	14 mg/dl	10 Units	-
	LOINC 14563-1 Hemoccult sp1 StI C Sample Lab - 12345		10 ml	-	•	- Not detected
	Sample Test #1 Sample Lab - 45678 Sample Test #4	-		-		Outlook not so good
	Sample Lab - 67890 Sample Test #6	¹¹ -		-		4.82 mL
Reduce Header and Footer Font Size						
	Allows yo fonts.	ou to redu	ice the si	ze of the	header ai	nd footer
	Reducing	g the Hea	der and F	ooter Siz	e on a Cli	nical Note
Move Non-SOAP Freedraws to End	Allows yo the end c			ages used	in freedr	aw fields to
	Detailed	Clinical N	lote Forn	natting		
Default to CDC Growth Charts	Enable th in the acc	-	g to defau	lt to the (CDC's gro	owth charts
			atient (Male ⁻ Complaint	1 week, 1 day 06	/05/2023 PATI000	0001)
	✓ CDC WHO Fenton Downs-Sy Pre-Term	rndrome		BMI for Age	Apple Health App Da	ata Ind Growth Charts
Hide Medications and Allergies by Default	You can I the clinic		ient's me	dications	and aller	rgies from
	How do I note?	hide med	lications	and aller	gies from	the clinical
Hide CPT and ICD on Clinical Notes by Default	Allows yo the clinic		CPT and	IICD-10	diagnosis	codes from
	Excluding	g Diagnos	sis and Bi	lling code	es from C	linical Notes

Allow Chief Complaint to be Persistent			
Allow Chief Complaint to be Persistent	With this setting enabled, the	pationt's chief compla	int
	•		
	(the reason for visit in the appointment window) will		
	automatically populate the 'chief complaint' field in the		
	clinical note and the 'reason f	or visit' field in the	
	appointment window. This in	formation is pulled fror	m the
	most recent visit.		
Preview Previous Note			
Preview Previous Note	M/han anablad a provinue of t	be contents of the ave	
	When enabled, a preview of t		
	note will display when you ho	over over the form in the	e
	selection screen.		
	Previous note data:		
	HPI: Laurie T. Sample's physical exam was normal.	Billing Account Marketplace F	Help
	General: True	06/14/2023	
	General [-]: no significant weight change,no weakness,no fatigue,no fever		
	General [+]:		
	Comments:	ections:	
	Skin: True	SOAP	•
	Skin [-]: no rash,no lumps,no sores,no itching,no	Sui	ubjective
	dryness,no color change,no changes in hair or nails Skin [+]:		ojective
	Comments:	ms 🗆 Ass	ssessmen an
	HEENT: True		
	HEENT [-]: no headache, no head injury, no		
	dizziness,no lightheadedness,no vision changes,no hearing problems,no tearing ,no tinnitus,no		
	vertigo,no earaches,no nasal stuffiness,	on Screen 🗍 Testing	a for App
	HEENT [+]:		
	Comments:	test Consul	
	Neck: True		
	Neck [-]: no lumps,no lymphadenopathy,no goiter,no pain,no stiffness		

Patient Vitals

The Patient Vitals settings allow you to set default metric or customary units for weight, height, head circumference, and temperature when you enter vitals.

Patient Vitals

Vitals Weight Unit	kg v	Can be overwritten for specific patient (and saved)
Vitals Height Unit	cm ~	Can be overwritten for specific patient (and saved)
Vitals Head Circumference Unit	cm v	Can be overwritten for specific patient (and saved)
Vitals Temperature Unit	c ~	Can be overwritten for specific patient (and saved)

Communications

Communications

Recorded Provider Name	▶ 0:00 / 0:00 → • •
Use official name on fax cover sheets	
Include notice of confidentiality on faxes and patient emails	
Notice to include	The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the exclusive use of the addressee(s). If you are not the addressee (or one of the addressees), you are not an intended recipient; if you are not an intended recipient, you
Enable sending non-free referral faxes	
Include Patient Problems in referrals by default	
Remove "Powered by drchrono" from Footer of Clinical Notes and Patient Statements	
Allow patients to confirm or cancel appointments from appointment reminder emails	
Direct Messaging	+ Set up your Direct Address

Update Entire Profile

Setting	Description
Recorded Provider Name	You can make a recording of your name. The recording
	will play within the voice reminder when it announces
	your name as the provider. For example, "You have an
	appointment with "RECORDED NAME" on Wednesday".
Use Official Name on Fax Cover Sheets	
	With this setting enabled the practice name will appear
	on the fax cover sheet instead of the provider's name.
	Attention:
	Dr. James Smith
	Fax: +1 650-555-5555
	Fax From:
	Family Practice
	Phone: (443) 555-5555 Fax: +1 (620)-555-5555
	Email:
	sample.email@drchrono.com
	Date: 2023-06-14 11:47:29 AM

Include Notice of Confidentiality on Faxes and Patient	
Emails	1. Enter your confidentiality notice in the text box.
	2. Enable the setting to display your confidentiality
	notice on faxes and emails.
	How do I add a confidentiality notice to the bottom of all
	outgoing faxes and emails?
Enable Sending Non-free Referral Faxes	
	With this enabled, only the "fax referral" option will
	appear when sending a referral.
	Sign your referral (Optional) X
	T
	JARES SMITH
	Save Signature 0
	Preview Fax Referral
	With this setting disabled, you are able to send a fax to
	the recipient with instructions on how to download the
	referral by selecting "Send Referral (free)".
	Sign your referral (Optional)
	JARES SMITH
	Save Signature 🖲
	Preview Fax
	Shew(n0010364)#

Include Patient Problems in Referrals by Default		u to include patient problems in referrals by
	default.	u to include patient problems in referrals by
	With this setting disabled, the "problems" checkbox when sending a referral will be unchecked.	
	🔽 Incli	ude Referral Summary ()
		Data To Include in Referral Summary
		Patient name: Tim Patient
		Sex: Male
		Birthdate: June 5, 2023
		Race: None known
		Ethnicity: None known
		Preferred language: None known
		Smoking status: None known
		Problems: Bite of turtle
Remove "Powered by DrChrono" from the Footer of Clinical Notes and Patient Statements		is setting to remove the Powered by DrChrono ent statements and clinical notes.
	[Page 2]	Pending e-signature Powered by DrChrono This page was generated at 06/14/2023 10.21AM MDT
Allow Patients to Confirm or Cancel Appointments from Appointment Reminder Emails		enabled, patients will be able to click on a link n or cancel their appointment.
		ointment with James Smith 4, 2023 at 2:00 p.m.
	ſ	Doctor James Smith Office 225 Schilling Circle Hunt Valley, MD 21031 When June 14, 2023 at 2:00 p.m.
		WhenSuffer 14, 2023 at 2.00 p.m./ebsitehttp://www.drchrono.comontact(443) 555-5555
	Co	onfirm Appointment Cancel Appointment

Click on the "+Set Up Your Direct Address" to set up Direct Messaging.

Setting Up Direct Messaging

Email

Incoming Email

Daily Agenda Emails	Z Send a HIPAA compliant daily agenda email		
Daily Billing Problems Emails	Send a daily billing problems email		
Recipients of Billing Email	sample.billing@samplepractice.com, practice.manager@samplepractice.com	Recipients of daily billing problems email, separated by comma "," or space " ". Leave blank to use default setting.	
Online Scheduling Emails	Send an email each time an appointm	nent is scheduled online	
Recipients of Online Scheduling Notification	scheduling@samplepractice.com, doctor1@samplepractice.com	Recipients of the online scheduling notifications email, separated by comma "," or space " ". Leave blank to use default setting.	
Include Notes in Emails	Reason and notes will be included in	daily emails	
Outgoing Email			

Use Alternative Email for Fax	Using alternative email address for f	ax and referral
Alternative Email for Fax		Alternative email address displayed in fax and referral
Custom Email Signature		
Recurring Reminders	Send Recurring Appointment Remin	ders

Update Entire Profile

Setting	Description
Daily Agenda Emails	
	Enable this setting to receive an email that has a schedule
	of your appointments for the day.
	Daily Agenda Email
Daily Billing Problems Emails	With this enabled, you can receive a daily email that
	details the unresolved billing claims and a list of unbilled
Recipients of Billing Email	appointments.
	Enter the email address of those in your practice who
	need to receive this email.
	Managing Your Daily Billing Problems Email

Online Scheduling Email	Enable this setting to receive an email when a patient
	schedules an appointment through the online scheduling
Recipients of Online Scheduling Notification	widget.
	Enter the email address of those in your practice who
	need to receive this email.
	A patient has scheduled an appointment in your fifice : Office 1.
	C reminders@drchrono.com <reminder< th=""> Today at 9:55 AM To: Sample Doctor</reminder<>
	Dear Dr. James Smith,
	A patient has scheduled a new appointment in your office, Office 1, through drchrono's online scheduling widget.
	The appointment has been scheduled for Friday June 16 at 08:00AM by the patient.
	You can view the appointment record here: https://drchrono.com/appointments/257344054
	This appointment scheduling powered by: <u>https://drchrono.com</u>
Include Patient Notes in Emails	
	With this setting enabled, receiving your daily agenda
	email will include any note entered into the "Note" field
	in the appointment window.
	Daily Agenda for Dr. James Smith as of 6:05AM 🛛 😳 🕤 « ,)
	N O no-reply@drchrono.com <no-reply@ 8:05="" am<br="" at="" today="">To: sample.doctor@fakepractice.com</no-reply@>
	dr chrono My Day
	Dr. James Smith: My schedule for Thu Jun, 15 2023 .
	Office 1
	07:50 AM - 08:20 AM Dr.
	Patient in Exam 1: Dolphin Bite Testing for notes James on daily agenda. Smith
	08:20 AM - 08:50 AM Dr.
	Patient in Exam 1: Followup Appointment Testing James for notes in daily agenda. Smith
	12:00 PM - 12:30 PM Dr.
	Scheduled Break: Lunch James Smith
	-

Use Alternative Email for Fax Alternative Email for Fax	By default, the email address for the provider will be included on faxes. With this setting enabled you can use an alternate email. Check the box and enter the email address in the field provided.
	Attention: Dr. James Smith Fax∺1 650-555-5555
	Fax From: Family Practice Phone: (443) 555-5555 Fax: +1 (620)-555-5555 Email: alternative.email@fakepractice.com Date: 2023-06-15 10:22:39 AM
	Total Pages: 4 Faxed from DrChrono EHR
	Notice of Confidentiality The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the exclusive use of the addressee(s). If you are not the addressee (or one of the addressees), you are not an intended recipient; if you are not an intended recipient, you hereby are notified that any use, disclosure, dissemination, distribution (other than to the addressee(s)), copying or taking of any action because of this information is strictly prohibited.

Custom Email Signature	
	With DrChrono's Send Email feature, you can send email messages to your patients. You can customize the signature that appears on the email.
	O reminders@drchrono.com <reminde 10:42="" am="" at="" fake.patient@notreal.com<="" th="" to:="" today=""></reminde>
	Dear Laurie Sample,
	Our office will be closed on Tuesday, July 4th for the Independence Day holiday.
	We will open at 8:00 a.m. on Wednesday, July 5th.
	Enjoy the holiday.
	Sample Doctor
	Check out my custom email signature.
	The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the exclusive use of the addressee(s). If you are not the addressee (or one of the addressees), you are not an intended recipient; if you are not an intended recipient, you hereby are notified that any use, disclosure, dissemination, distribution (other than to the addressee(s)), copying or taking of any action because of this information is strictly prohibited.
	Click here to unsubscribe from messages from this provider. The doctor will be notified you no longer wish to receive reminders about
Recurring Reminders	Enable this setting to send reminders for recurring
	appointments.

Medical Billing

Medical Billing is where you enter your billing information and complete your billing setup.

Medical Billing Account Settings

eRx Info

Account Settings						
Profile General Email Medi	cal Billing eRx Info	Services	Usage	Sample Data	Security	Patient Payments
Register for eRx	Verify with	h ID .me	0			
Prescriber Info						
State License Number	123456789					
DEA Number	ABC123					
Narcotics Addiction DEA Number (NADEAN)	8888888					
Prescribing Physician's Name			The prescribi	ng physician's name	displayed in el	Rx. Leave blank if the same as user's name.
Physician Date of Birth	06/14/1979					
Medicaid Provider Number	123456ABC					

To register for eRx, click on the **Verify with ID.me** button. For more information on the registration process see our articles on eRx and EPCS setup.

Under the **Prescriber Info** section, you can enter your prescriber information into the fields.

Update Entire Profile

Setting Up eRx with ID.me

Setting Up EPCS with ID.me

Services



Calendar Sync allows you to sync out (one way) your DrChrono schedule to a Google Calendar, Apple iCal, or Microsoft Outlook.

How do I sync my DrChrono calendar to my Google Calendar?

Usage

Profile General	Email	Medical Billing	eRx Info	Services	Usage	Sample Data	Security	Patient Payment
Current Usage [1	orovide	r(s)]			02/	15/2021 – 03	/14/2021	
	provide	(0)]	Users		UL/			
Description			Usage				age charge	
Fax				0 / 1,000			05 per page	
SMS				0 / 300		\$ (0.05 per text	
Phone				0 / 300		\$ 0.15 pe	r phone call	
Peer 2 peer telemedicine				0 / 0				
ne Usage tab shows ow do I see how ma	you the	number of faxe		-			0.00 per call	its.
ne Usage tab shows ow do I see how ma ample Data Account Set	you the	number of faxe		kt message				its.
ne Usage tab shows ow do I see how ma ample Data	you the	number of faxe		kt message				
ne Usage tab shows ow do I see how ma ample Data Account Set	you the ny faxes tings	number of faxe	s, and phor	kt message ne calls I ha	ve sent?	reminders, an	d video vis	
ne Usage tab shows ow do I see how ma ample Data Account Set Profile General	you the ny faxes tings Email	number of faxe	s, and phor	kt message ne calls I ha Services	ve sent?	reminders, an	d video vis	its. Patient Payments
ne Usage tab shows ow do I see how ma ample Data Account Set Profile General Sample Data	you the ny faxes tings Email	number of faxe	s, and phor	kt message ne calls I ha Services	ve sent?	reminders, an	d video vis	
ne Usage tab shows ow do I see how ma ample Data Account Set Profile General Sample Data	you the ny faxes tings Email	number of faxe s, text messages Medical Billing Int (can be easily i sample data (MU)	eRx Info	kt message ne calls I ha Services	ve sent?	reminders, an	d video vis	
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Sample Data populates your account with a series of fake patients you can work with to get to know how to use DrChrono without having to worry about using live patients.

Turning On and Turning Off Your Sample Data

Security



Email to use: sample.fake@fakepractice.com Cell phone to use: (410) 555-5555

Current password

Under the Security tab, you can set up 2-factor authentication for your account. With 2-factor authentication, you can add an additional safeguard to your account.

How do I set up 2-factor authentication in my account?

How does 2-factor authentication work in DrChrono?

Patient Payments

Account Settings

Profile General Email Med	ical Billing eRx Info Services Usage Sample Data Security Patient Payments			
General				
Require balance 🛛 Require an outstanding patient balance for credit card payments				
DrChrono Payments				
Current Default Mercha	Use individual doctor's setting (if turned off, will use practice group's defaults) Current Default Merchant Enroll Additional DrChrono Payments Merchant Account			
onpatient				
Allow onpatient paymen onpatient payment defa Minimum onpatient paymen	It DrChrono Payments			

Auto Allocations

Auto Allocate 🛛 Automatically allocate to line items when patient balance is available.

Auto un-allocate
Automatically un-allocate overpaid line items.

Use other appointment payments Use payments set aside for other appointments during allocations.

Update Entire Profile

Setting	Description
Require Balance	With this setting enabled, patients will need to have a
	balance before they can make a payment online.
DrChrono Payments	
	DrChrono's integrated payment processor allows you to
	process credit cards for patient payments.
	DrChrono Payments: How to set up your account
OnPatient	If you are going to accept payments through OnPatient,
Allow Patient Payments	you need to enable the settings to accept payments
OnPatient Payment Default	online, select DrChrono Payments to process, and enter
Minimum OnPatient Payments	a minimum payment amount.
	Enabling Patient Payments in OnPatient
Auto Allocations	The auto-allocate feature allows you to automatically
Auto Allocate	apply payments to line items for a patient.
Auto un-allocate	
Use other appointment types	Patient Payments Auto Allocation FAQ