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.
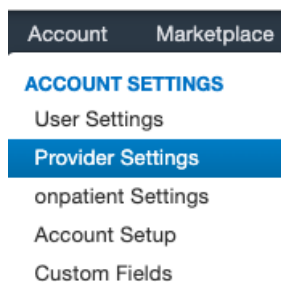

The Settings section is divided into ten tabs that handle different setting groups. In this article, you can click on the setting in the table below to jump to a specific tab.

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

General

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

Calendar Settings

Calendar Settings

Setting	Description
	Display flag icon on appointment — ☐ Display Flag icon on appointments when a patient/appointment has flag(s) associated
	Display lock icon on appointment — ☐ Display Lock icon on appointments when the clinical note is locked
	Use new dashboard homescreen — ☐ Uncheck to go straight to the calendar after logging in
	Show user satisfaction survey — ☑ Uncheck to opt out of user satisfaction 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 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

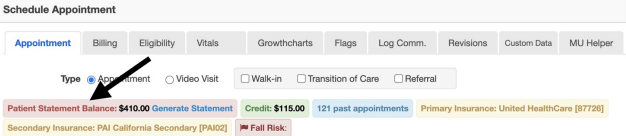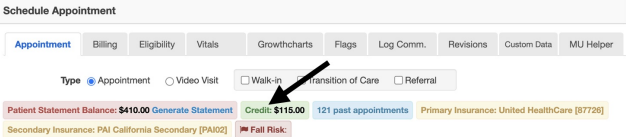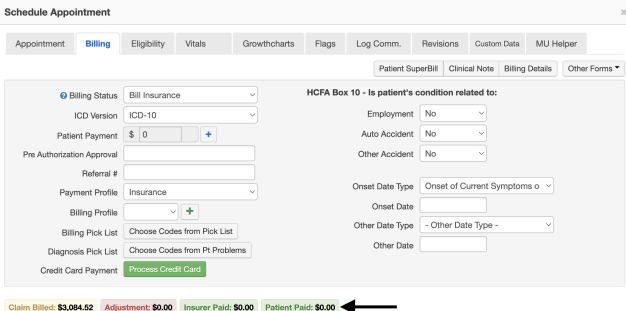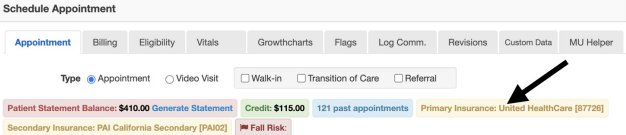| Setting	Description
Display Flag Icon on Appointment Display Lock Icon on Appointment	Displays a lock or flag icon to show when a clinical note is locked or when a patient has flags on the calendar view. What do the lock and flag icons on my appointments mean?
Use New Dashboard Homescreen	When you 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

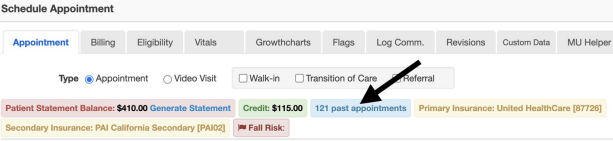|	
Allow Exam Room Overlaps	Allows you to schedule appointments in the same exam room at the same time. How do I schedule multiple appointments in the same exam room at one time?
Global Overlap Checking	This setting will not allow appointments to be double-booked in any exam room or office. If you do not want any double bookings at all, enable this setting. Enabling or Disabling Overlapping Appointments
Appointment Default Color	Sets a default appointment color of your choice for this provider's appointments How can I change the default appointment color?
Phonetic Name	Allows you to set the pronunciation of your name for reminders. How do I change the pronunciation of my name in appointment reminders?
Hide Canceled Appointments Hide Rescheduled Appointments	Enable this setting to hide canceled and rescheduled appointments from the calendar. 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

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

Setting	Description

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.
Patient's Current Balance	Allows you to display the patient's current balance as a flag in the appointment window.
Claim's Billing Information	Displays the billing information for claims in the billing tab of the appointment window.
Patient's Insurance	Shows flags in the appointment window for the patient's insurance.
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.
Matched CDS Rules	Enable this setting to view flags based on Clinical 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?
Autorun Eligibility	Allows you to enter a number of days to autorun eligibility before an appointment. Save Time with Auto Eligibility Checks

Meaningful Use

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

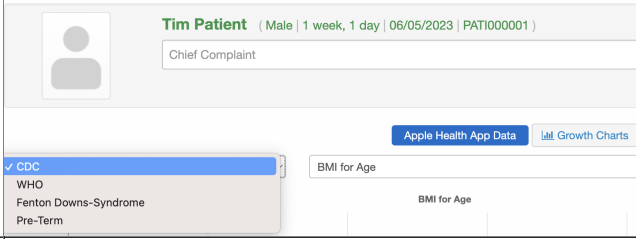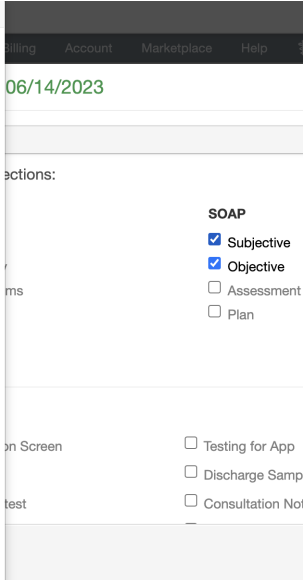| Setting	Description
Include Practice Official Name	Adds the practice name from the medical billing tab on the clinical note. (See below)
Include Business Logo	Allows you to add your business logo to the top of the clinical note. (See below)
Include Patient Chart Photo	Includes the patient's profile 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	**Sex:** F
Provider: Dr. James Smith	**Visit:** 06/09/2023 8:00AM	**Chart:** SAJA000001
Office: Office 2	**Address:** 345 Fake Street, Baltimore, MD, 12345	
Primary Payer ID: 87726	**Secondary Payer ID:** PAI02	

Clinical Note Settings Continued

Setting	Description

Include Lab Orders and Results	Allows you to show lab orders and results in the plan section of the note. **Plan:** **Lab Results:** <table><tr><td>Test</td><td>Normal Range</td><td>2023-03-28</td><td>2022-03-31</td><td>2022-02-24</td><td>2019-04-04</td></tr><tr><td>LOINC 11502-2 Laboratory report</td><td>8-12</td><td>-</td><td>14 mg/dl</td><td>10 Units</td><td>-</td></tr><tr><td>LOINC 14563-1 Hemoccult sp1 Stl Ql</td><td>5-15</td><td>10 ml</td><td>-</td><td>-</td><td>-</td></tr><tr><td>Sample Lab - 123456 Sample Test #1</td><td>-</td><td>-</td><td>-</td><td>-</td><td>Not detected</td></tr><tr><td>Sample Lab - 456789 Sample Test #4</td><td>-</td><td>-</td><td>-</td><td>-</td><td>Outlook not so good</td></tr><tr><td>Sample Lab - 678901 Sample Test #6</td><td>-</td><td>-</td><td>-</td><td>-</td><td>4.82 mL</td></tr></table>
Reduce Header and Footer Font Size	Allows you to reduce the size of the header and footer fonts. Reducing the Header and Footer Size on a Clinical Note
Move Non-SOAP Freedraws to End	Allows you to move the images used in freedraw fields to the end of the note. Detailed Clinical Note Formatting
Default to CDC Growth Charts	Enable this setting to default to the CDC's growth charts in the account. Tim Patient (Male | 1 week, 1 day | 06/05/2023 | PATI000001) Chief Complaint Apple Health App Data | Growth Charts ✓ CDC WHO Fenton Downs-Syndrome Pre-Term BMI for Age
Hide Medications and Allergies by Default	You can hide a patient's medications and allergies from the clinical note. How do I hide medications and allergies from the clinical note?
Hide CPT and ICD on Clinical Notes by Default	Allows you to hide CPT and ICD-10 diagnosis codes from the clinical note. Excluding Diagnosis and Billing codes from Clinical Notes

Allow Chief Complaint to be Persistent	With this setting enabled, the patient's chief complaint (the reason for visit in the appointment window) will automatically populate the 'chief complaint' field in the clinical note and the 'reason for visit' field in the appointment window. This information is pulled from the most recent visit.
Preview Previous Note	When enabled, a preview of the contents of the previous note will display when you hover over the form in the selection screen.

Previous note data:

HPI: Laurie T. Sample's physical exam was normal.

General: True

General [-]: no significant weight change,no weakness,no fatigue,no fever

General [+]:

Comments:

Skin: True

Skin [-]: no rash,no lumps,no sores,no itching,no dryness,no color change,no changes in hair or nails

Skin [+]:

Comments:

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,…

HEENT [+]:

Comments:

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	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	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 —————— 🔊 ⋮

🎤 Record

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. 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)".

Include Patient Problems in Referrals by Default	Allows you to include patient problems in referrals by default. With this setting disabled, the "problems" checkbox when sending a referral will be unchecked. ☑ Include 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	Enable this setting to remove the Powered by DrChrono from patient statements and clinical notes. [Page 2] Pending e-signature This page was generated at 06/14/2023 10:21AM MDT ⟶ *Powered by* **DrChrono**
Allow Patients to Confirm or Cancel Appointments from Appointment Reminder Emails	With this enabled, patients will be able to click on a link to confirm or cancel their appointment. **Appointment with James Smith** June 14, 2023 at 2:00 p.m. **Doctor** James Smith **Office** 225 Schilling Circle Hunt Valley, MD 21031 **When** June 14, 2023 at 2:00 p.m. **Website** http://www.drchrono.com **Contact** (443) 555-5555 Confirm Appointment Cancel Appointment

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

Email

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 Recipients of Billing Email	With this enabled, you can receive a daily email that details the unresolved billing claims and a list of unbilled 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 Recipients of Online Scheduling Notification	Enable this setting to receive an email when a patient schedules an appointment through the online scheduling widget. Enter the email address of those in your practice who need to receive this email. **A patient has scheduled an appointment in your office: Office 1.** ☺ ↩ ↩ ↪ **R** ○ reminders@drchrono.com <reminder... Today at 9:55 AM **To:** Sample Doctor 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: https://drchrono.com
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** ○ no-reply@drchrono.com <no-reply@... Today at 8:05 AM **To:** sample.doctor@fakepractice.com **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.
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.
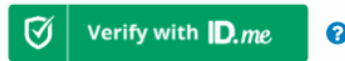
Medical Billing Account Settings

eRx Info

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.

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

The Usage tab shows you the number of faxes, SMS text messages, phone reminders, and video visits.

How do I see how many faxes, text messages, and phone calls I have sent?

Sample Data

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

Account Settings

Two Factor Authentication   [?]

Status: Disabled

Your Authy account will be tied to your email and cell phone (only one Authy account per email and cell phone).

When you enable 2-Factor Authentication, an Authy account will be created and tied to your cell phone and email address.

Please download Authy on your mobile device:

Download on the **App Store**   GET IT ON **Google Play**

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

General

Require balance	☑ Require an outstanding patient balance for credit card payments

DrChrono Payments

☐ 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 payments	☑ Allow patients with onpatient access to make payments through the onpatient portal
onpatient payment default	[DrChrono Payments ▾]
Minimum onpatient payments	[5.00] Set minimum amount for payments from onpatient

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 • Allow Patient Payments • OnPatient Payment Default • Minimum OnPatient Payments	If you are going to accept payments through OnPatient, you need to enable the settings to accept payments online, select DrChrono Payments to process, and enter a minimum payment amount. Enabling Patient Payments in OnPatient
Auto Allocations • Auto Allocate • Auto un-allocate • Use other appointment types	The auto-allocate feature allows you to automatically apply payments to line items for a patient. Patient Payments Auto Allocation FAQ