Using the Practice Group Dropdown

07/24/2024 10:11 pm EDT

The practice group dropdown allows you to view the collective information of the practice, from all providers, when the **Practice Group** option is selected.

Accessing the Practice Group Dropdown

1. To access the practice group, click on the (

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) icon next to the provider's name at the top of the screen and select the Practice Group.

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2. Once the **Practice Group** is selected, you will be able to see all of the information for the practice group instead of an individual provider.

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27	28	29	30	1	2	3																
4	5	6	7	8	9	10																
11	12	13	14	15	16	17																

Note: While the Practice Group is selected, individual provider settings will not be available.

One of the primary uses of the Practice Group is viewing reports.

BillingAccountMarketplaceBILLINGBilling SummaryLive Claims FeedPatient PaymentsFinancial Transactions (Day Sheet)

Let's look at an example under Billing > Financial Transaction (Day Sheet).

With one provider selected **only** the totals for the selected provider are displayed.

dr chrono			Brendan Wilberton	- Brendan Wilberton (brendanwilberton)							
Schedule Clinical Patients	s Reports Billing Account Help	≹ X		Search 🔽 🧐 💶 🕇							
Billing Summary	Day Sheet Default Reimburs	ement Analysis									
Live Claims Feed	10/21/2020 (Max 31 days) Patient All Office V All Room V All Reasc V										
Patient Payments (beta)											
Day Sheet	Day Sheet Display Credits & Adjmt by Posted Date V Display Charges by Posted Date V Include Moved Cash Yes V C Update										
Transactions											
Remittance Reports	Grand Totals Credits & Adjustments Patient Payments Charges										
Unmatched ERAs	\$225.00	\$0.00	\$0.00	\$20.00							
Accounts Receivable	ΨΖΖΟ.00	ψυ,υυ	ψ0.00	ΨΖ0,00							
Patient Statements	DEBIT	CREDIT	ADJUSTMENT	PATIENT PAYMENT							

With the Practice Group selected the totals for **all** providers within the group are displayed.

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Schedule Patients Report	ts Billing Account	Search 20 = 27 +								
Billing Summary	Day Sheet Default Reimbursement Analysis									
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Patient Payments (beta)										
Day Sheet Display Credits & Adjmt by Posted Date Display Charges by Posted Date Include Moved Cash Yes V										
Transactions		Action -								
Remittance Reports	Grand Totals Credits & Adjustments Patient Payments Charges									
Unmatched ERAs	\$500.00 \$0.00 \$0.00	\$40.00								
Accounts Receivable	φ0:00 φ0:00	ψ=0.00								
Patient Statements	DEBIT CREDIT ADJUSTMENT	PATIENT PAYMENT								

Permissions for the Practice Group Dropdown

By default, all roles in DrChrono come with access to the practice group, but it can be found in the permissions menu as **View Practice Group**.

Permissions for James Smith	×
Access to eRx 0	
Access Billing 1	2
Access Patient Payments 1	 ✓
Access Patient Analytics ()	
Provider Dropdown	2
View Practice Group 1	
Share Patients	
Access Reports 1	
Settings 🔁	Z
Export Patients 1	
Manage Permissions ()	
Close	Save Permissions

If the View Practice Group permission is not enabled it will not appear in the menu as seen below.

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Schedule	Clinical	Patients	s Reports	Billing	Account	Help	.	×				James Smith Brendan Wilberton
Permiss	sions	Admir	istration	?							l	
Providers	Staff	Roles	Permissions	Permissi	on Grid							
Provider										Role		
James Smit	ı									Custom		
Brendan Wil	berton									Custom		

Another useful, but not required, setting that can be helpful in multi-provider accounts is the **Provider Dropdown**.

Permissions for James Smith × ✓ Sign/Lock Clinical Notes 1 Drug Interactions Check 1 Access to eRx **1** Access Billing () ✓ Access Patient Payments () Access Patient Analytics 0 ✓ Provider Dropdown () View Practice Group () Share Patients () \checkmark Access Reports 1 ✓ Settings **1** Close

With this permission enabled, multiple providers will appear in the dropdown menu. If it is not enabled it will only display one provider.

dr chror	10		👗 Brendan Wilberton 👻							
Schedule	Clinical	Patients	Reports	Billing	Account	Help	₩	×		Brendan Wilberton Practice Group: Springfield General Practice
Permiss	ions A	Adminis	stration	?						
Providers	Staff	Roles Pe	ermissions	Permissio	on Grid					
Provider									Role	
James Smith									Custom	
Brendan Wilk	perton								Custom	