

# Practice Settings: Office Setup and Management

07/24/2024 7:30 pm EDT

To manage your offices, from your DrChrono navigation bar, mouse over the **Account** tab and select **Offices**.

Account Marketplace

**ACCOUNT SETTINGS**

- User Settings
- Provider Settings
- onpatient Settings
- Account Setup
- Custom Fields
- Copy Dashboard (Beta)
- API
- App Directory

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**PRACTICE SETTINGS**

- Offices**
- Facilities

This will bring you to the 'Manage Offices' page which lets you view and edit your offices. From here you can create a new office, edit existing offices, and share that office's appointment link with your patients.

Manage offices ?

Active Offices Page 1 of 1 [+ Add New Office](#)

| Name     | Provider        | Address              | City         | Phone          | Facility Code | # Exam Rooms | Online Schedule                            | Sharing   |
|----------|-----------------|----------------------|--------------|----------------|---------------|--------------|--|---|
| Office 1 | Dr. Jane Parks  | 225 Schilling Circle | Hunt Valley  | (443) 555-5555 | 11            | 3            | New And Existing Patients All Appointments | <a href="#">Share</a> <a href="#">View</a> <a href="#">History</a> <a href="#">Edit</a> <a href="#">Archive</a> |
| Office 2 | Dr. Jane Parks  | 123 Fake Street      | Baltimore    | (410) 555-5555 | 11            | 4            | New And Existing Patients All Appointments | <a href="#">Share</a> <a href="#">View</a> <a href="#">History</a> <a href="#">Edit</a> <a href="#">Archive</a> |
| Office 3 | Dr. James Smith | 225 Schilling Circle | Fort Collins | (970) 555-5555 | 11            | 4            | New And Existing Patients All Appointments | <a href="#">Share</a> <a href="#">View</a> <a href="#">History</a> <a href="#">Edit</a> <a href="#">Archive</a> |
| Office 4 | Dr. James Smith | 328 Gibraltar Dr     | Sunnyvale    | (650) 555-5555 | 02            | 1            | New And Existing Patients All Appointments | <a href="#">Share</a> <a href="#">View</a> <a href="#">History</a> <a href="#">Edit</a> <a href="#">Archive</a> |

## Creating a New Office

To create a new office, select the **+Add New Office** button in the upper right-hand corner of the 'Manage Offices' page. To create a new office, there are three tabs (Basic, Billing, and Online Schedule) that you may use to fill out your office information.

### 1. The Basics Tab

The basics tab is the only tab that is required to be filled out to create an office. Here you will find the name, provider, and location fields to identify your office. The phone number you enter here is the number that will appear as the call-back number in the text and email reminders for this office. You may also select the number of exam rooms the office has and assign a name to each room. These rooms are important for scheduling purposes while creating an appointment.

# New Office

Basic **Billing** Online Schedule

**Warning:** Changing the address of an office affects all previous appointments in that office.

Office name (scheduling)

Facility name  Used in HCFA box#32 and UB04 box#2. Leave it blank if same to Office name (Scheduling)

Primary Provider

Country

Address

Zip Code

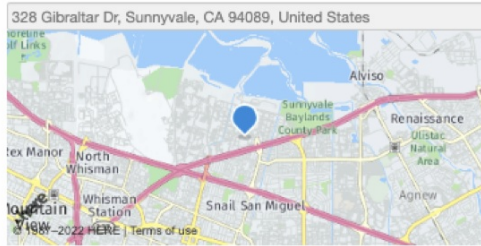
State

City

Office Phone  Not validated. [Click here to verify with a test call.](#)

Fax

Formatted Address  Not editable. Only valid for US addresses.



Number of Exam Rooms

Exam Name 1   Allow Online Scheduling  Excluded from Meaningful Use  Archived from Calendar

Office hours start

Office hours end

Require reason when deleting appointments

Save

## 2. The Billing Tab

The billing tab allows you to fill out essential billing information associated with your office. Here you will find fields for the billing name, facility code, provider office, office NPI number, office provider number, tax ID, billing NPI number, CLIA number, and CLIA expiration fields.

Basic

Billing

Online Schedule

|   |                             |  |
|---|-----------------------------|--|
| Billing name                                      | <input type="text"/>        | Leave it blank if same to account settings.                      |
| Facility Code                                     | 81 - Independent Laboratory |  |
| Billing Provider Office                           | -----                       | Professional medical billing only.                               |
| Use facility NPI number in box 32a of HCFA form   | <input type="checkbox"/>    |  |
| Facility NPI number                               | 8593958583                  | Used in HCFA box#32a and UB04 box#56                             |
| Facility provider number                          | 4576389238                  |  |
| Billing Tax ID # (professional)                   | <input type="text"/>        | Leave it blank if same to account settings.                      |
| Billing NPI number                                | <input type="text"/>        | Leave it blank if same to account settings.                      |
| CLIA Number                                       | <input type="text"/>        | CLIA # for billing. Leave it blank if same to account setting.   |
| CLIA Expiration Date                              | 09/12/2017                  | Expiration date for CLIA number.                                 |
| Use alternate pay to address for EDI              | <input type="checkbox"/>    | use alternate "pay to" address in EDI billing if checked.        |
| Use alternate pay to address for HCFA             | <input type="checkbox"/>    | use alternate "pay to" address in HCFA form block 33 if checked. |
| Use alternate pay to address in Patient Statement | <input type="checkbox"/>    | use alternate "pay to" address in patient statement if checked.  |

Save

### 3. Online Scheduling Tab

The online scheduling tab allows you to select what hours are available for your patients to schedule online. You can enable or disable online scheduling with the **Show this office information online** and **Allow Online Scheduling** checkboxes. Upon checking the 'Allow Online Scheduling' check box, a time selection box will appear for you to select all periods to allow online scheduling.

## Edit Office

Basic **Billing** Online Schedule

Show this office information online

Allow online scheduling in this office

Allow existing patients follow ups

Allow existing patient new appointments

Allow new patient appointments

Allow patients to cancel appointments online

No confirmation emails

Optional Google Analytics code to track the online appointment scheduler (e.g. UA-46121010-1)

Cutoff time for appointments made with the online scheduler.

Highlight the hours for which you want to allow online scheduling of appointments. Click the name of a day to select the entire day.

| Sunday    | Monday    | Tuesday   | Wednesday | Thursday  | Friday    | Saturday  |   |   |
|-----------|-----------|-----------|-----------|-----------|-----------|-----------|---|---|
| 6:00 a.m. | 6:00 a.m. | 6:00 a.m. | 6:00 a.m. | 6:00 a.m. | 6:00 a.m. | 6:00 a.m. | ↑ | ↓ |
| 6:15 a.m. | 6:15 a.m. | 6:15 a.m. | 6:15 a.m. | 6:15 a.m. | 6:15 a.m. | 6:15 a.m. |   |   |
| 6:30 a.m. | 6:30 a.m. | 6:30 a.m. | 6:30 a.m. | 6:30 a.m. | 6:30 a.m. | 6:30 a.m. |   |   |
| 6:45 a.m. | 6:45 a.m. | 6:45 a.m. | 6:45 a.m. | 6:45 a.m. | 6:45 a.m. | 6:45 a.m. |   |   |
| 7:00 a.m. | 7:00 a.m. | 7:00 a.m. | 7:00 a.m. | 7:00 a.m. | 7:00 a.m. | 7:00 a.m. |   |   |
| 7:15 a.m. | 7:15 a.m. | 7:15 a.m. | 7:15 a.m. | 7:15 a.m. | 7:15 a.m. | 7:15 a.m. |   |   |
| 7:30 a.m. | 7:30 a.m. | 7:30 a.m. | 7:30 a.m. | 7:30 a.m. | 7:30 a.m. | 7:30 a.m. |   |   |
| 7:45 a.m. | 7:45 a.m. | 7:45 a.m. | 7:45 a.m. | 7:45 a.m. | 7:45 a.m. | 7:45 a.m. |   |   |
| 8:00 a.m. | 8:00 a.m. | 8:00 a.m. | 8:00 a.m. | 8:00 a.m. | 8:00 a.m. | 8:00 a.m. |   |   |
| 8:15 a.m. | 8:15 a.m. | 8:15 a.m. | 8:15 a.m. | 8:15 a.m. | 8:15 a.m. | 8:15 a.m. |   |   |
| 8:30 a.m. | 8:30 a.m. | 8:30 a.m. | 8:30 a.m. | 8:30 a.m. | 8:30 a.m. | 8:30 a.m. |   |   |
| 8:45 a.m. | 8:45 a.m. | 8:45 a.m. | 8:45 a.m. | 8:45 a.m. | 8:45 a.m. | 8:45 a.m. |   |   |
| 9:00 a.m. | 9:00 a.m. | 9:00 a.m. | 9:00 a.m. | 9:00 a.m. | 9:00 a.m. | 9:00 a.m. |   |   |
| 9:15 a.m. | 9:15 a.m. | 9:15 a.m. | 9:15 a.m. | 9:15 a.m. | 9:15 a.m. | 9:15 a.m. |   |   |

**Note:** Confirmation emails will be sent to the patient, who schedules using the scheduling widget, automatically to confirm their appointment. You can disable this process by checking the **No confirmation emails** box.

## Organizing Your Offices

### 1. Reordering your offices

To reorder your offices, click and hold down on the icon shown below.



After clicking and holding down on the icon, drag and drop the office to the desired position.

If you have more than 25 offices, your offices will be displayed on two pages. To reorder offices to another page, select the **Show All Offices** switch on top of your office list. This switch will only appear if you have more than 25 offices.

## Manage offices

Active Offices **Show All Offices**

## 2. Archiving/Unarchiving Your Offices

To archive an unused office, select the **Archive** button next to the corresponding office. Once an office is archived, all appointments associated with the office will also be archived.

A rectangular button with a light gray border and a light gray background. The word "Archive" is written in a bold, red, sans-serif font in the center.

Your archived offices will appear in a section titled 'Archived Offices' below. To unarchive an office, select the **Unarchive** button. Once an office is unarchived, the appointments associated with that office will also become unarchived.

### Archived Offices

| Name<br>Provider | Address       | City      | Phone | Facility Code | # Exam Rooms |                           |
|------------------|---------------|-----------|-------|---------------|--------------|---------------------------|
| Test Office      | 1 Main Street | Cupertino |       | 11            | 4            | <a href="#">Unarchive</a> |