

Archiving and Changing Offices

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Practice groups change over time, and when they do, changes need to be made in order to keep your EHR updated. For example, you are moving locations. If a provider is removed from a practice group, their office will still remain. If you have any offices that are in a provider's name, you'll either need to change the provider and/or name of the office or archive the office.

Note: When an office is archived, the appointments attached to the office are also archived. If you archive an office and wish to keep the appointments, you'll need to transfer the appointments to a new office prior to archival. Archiving is not a permanent action and may be undone to retrieve archived appointments.

Archiving an Office

To archive an office, you'll need to access the Office Management page.

- To begin, go to **Account** and select **Offices**.

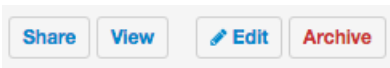
The screenshot shows a navigation menu with two main sections: 'ACCOUNT SETTINGS' and 'PRACTICE SETTINGS'. Under 'ACCOUNT SETTINGS', there are links for User Settings, Provider Settings, onpatient Settings, Account Setup, Custom Fields, Copy Dashboard (Beta), API, and App Directory. Under 'PRACTICE SETTINGS', there are links for 'Offices' (which is highlighted with a blue bar) and 'Facilities'.

- You'll be presented with the 'Manage Offices' page. Here you will see a list of your active offices, their location, phone number, facility code, number of exam rooms, and their settings for online scheduling.

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 | Share View | History | Edit Archive |
| Office 2 Dr. Jane Parks | 123 Fake Street | Baltimore | (410) 555-5555 | 11 | 4 | New And Existing Patients All Appointments | Share View | History | Edit Archive |
| Office 3 Dr. James Smith | 225 Schilling Circle | Fort Collins | (970) 555-5555 | 11 | 4 | New And Existing Patients All Appointments | Share View | History | Edit Archive |
| Office 4 Dr. James Smith | 328 Gibraltar Dr | Sunnyvale | (650) 555-5555 | 02 | 1 | New And Existing Patients All Appointments | Share View | History | Edit Archive |

- To the right of the office you wish to archive, there are four buttons: Share, View, Edit, and Archive. Select the **Archive** button and your office will be archived.



Your archived offices will then appear in the section below. You may select **Unarchive** to retrieve an office. Any existing appointments attached to an archived office will be unarchived when the office is retrieved.

Archived Offices

| Name Provider | Address | City | Phone | Facility Code | # Exam Rooms | |
|------------------|---------------|-----------|-------|------------------|-----------------|---|
| Test Office | 1 Main Street | Cupertino | | 11 | 4 | History Unarchive |

Updating an Office

To update an office's name, provider, address, exam rooms, and operating hours, select the **Edit** button to the right of the office you would like to edit.



The 'Edit Office' form will open. Here you can edit any attributes of the office using the fields provided. Once you are done, select **Save** at the bottom of the screen, and your new updated office information will be saved to the DrChrono EHR.

Edit 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

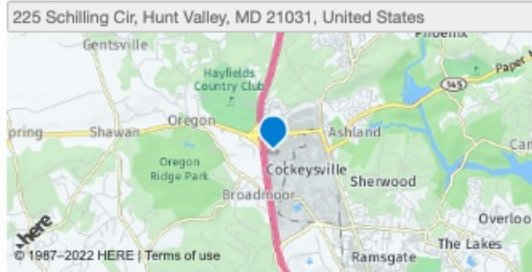
State

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

Exam Name 2 Allow Online Scheduling Excluded from Meaningful Use Archived from Calendar

Exam Name 3 Allow Online Scheduling Excluded from Meaningful Use Archived from Calendar

Office hours start

Office hours end

Require reason when deleting appointments

Save