INTERNAL- Practice Group Settings

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Add Doctor - used when adding a provider to a practice group/account

Add Admin - used when adding an admin to a practice group/account

Primary Practice Group Settings

Light Suspended - Providers cannot create appointments, but retain all other access to the account

Organization name - Official name of the practice group/account

Organization name recording - Custom recording of practice name to be used in phone reminders

Share custom clinical templates - will allow the sharing of a custom template between providers of the same practice group. These are the forms under the **Additional** tab.

Share clinical templates - will allow the sharing of clinical templates between providers of the same practice group. These are the forms under the **Presets** in the form builder or **(H&P and SOAP)** tabs in the clinical note
Note: If a practice group is sharing clinical templates, please ensure that both the Custom and Clinical boxes are checked so that all forms are covered.

Doctor sharing clinical templates - identifies the provider where the template to be shared is stored

Share consent forms - allows the sharing of consent forms between providers of the same practice group

Share appointment profiles - allows the sharing of appointment profiles between providers of the same practice group

Share billing profiles - allows the sharing of billing profiles between providers of the same practice group

Share reminder profiles - allows the sharing of reminder profiles between providers of the same practice group

Share fee schedules - allows the sharing of fee schedules between providers of the same practice group

Share adjustment master - allows the sharing of the adjustment master between providers of the same practice group

Share custom procedures - allows the sharing of custom procedures between providers of the same practice group

Share inventory - allows the sharing of inventory between providers of the same practice group

Share macros - allows the sharing of macros between providers of the same practice group

Share communications - allows the sharing of communications between providers of the same practice group. Includes:

Incoming/Outgoing Faxes -
Incoming/Outgoing Direct Messaging
Incoming Lab Results
Incoming eRx Requests (Refills)

Incoming Referrals
Tasks (Legacy Version)
onpatient Patient Messages
onpatient Confirm/Cancel Appointment Messages
Audit Log Reports
Advanced Reports
Clinical Notes Reports
Patient Statement Reports
Live Claims Feed Reports
Patient Phone Log Export
Patient Growth Chart Export (CDC/WHO)
Patient Payments (Payment Processed/Charged)
Stripe Transaction Export
837P Export
C-CDA Exports
QRDA Exports
EPCS Setup Confirmation
Box Connection/Disconnection Status
Exceeded Usage Limits (Fax)

Share contact list - allows the sharing of the contact list between providers of the same practice group if they are not sharing the same fax line

Share edi enrollments - allows the sharing of edi enrollments between providers of the same practice group who are billing under the same TIN and NPI

Use appointment profiles from appointment - shows appointment profiles based on the appointment's provider setting in the appointment. If this setting is disabled, when you select an appointment profile for an appointment, and then select a provider, the profile will not remain. With this setting enabled, the profile will remain when the provider is changed.

Sales liaison email - email of the sales rep to send daily site status

Default exam room time step - Default time step in minutes of visible cells in exam room view

Default exam room time row - Default time step in minutes of visible row headings in exam room view

Monthly backup password key - Password to protect the provider's monthly backup zip files

Billing NPI - Providers individual NPI number; used if credentialing was done under the providers individual (type 1) NPI number

Eps enrollment npi - NPI used to initiate enrollment with clearinghouse ePS

Organizational tax id - NPI of the practice group; used if credentialing was done under the practice group (type 2) NPI number

Billing signup fee - Initial signup fee (check contract - is often waived)

Billing srb rate - Success Rate Billing Rate of ERA charges (check contract)

Billing monthly minimum - Client's monthly minimum fee to cover DrChrono costs to service account (check contract)

Billing monthly maximum - Client's monthly maximum fee; not often used (check contract)

Billing notes - Internal notes for DrChrono. Can be used to document # of iPads received, etc

Does dr balance bill - If selected, the provider will charge patients unpaid insurance amounts by default

Official office address - Official office address (if used, all 5 "official" fields must be filled out)

Official office city -

Official office zip code -

Official office state -

Official office phone -

Appointment default primary - if selected, any appointment scheduled for this doctor will automatically be set to the patient's primary provider

Hide doctor change - If selected, it will hide the doctor change dropdown and prevents users in the practice group from accessing the provider's account

Hide patient export - If selected, only the office admin can export patient data. (prevents providers who are not admins from exporting patient data - sometimes happens when providers leave the practice group)

Sort offices by name - list offices in alphabetical order by office name

Share to all patients - Enable/disable the “Send to all patients“ option on the Send Email page for doctors in the practice group.

Is Paysimple enabled - to enable practice group to use PS/DrChrono Payments processor

Require new user email verification - require new users to verify their email address to unlock their accounts

Enable Attachment Type Indicator (Only for Medicaid of Alaska) - enable/disable the attachment type indicator field on the billing details page

Is invalid appointment purging enabled - enables purging of invalid appointments

Patient Group Options

Allow all OnPatient payment refunds - will allow refunds after OnPatient payments are made

Auto appointment reminders - if selected, will automatically assign the appointment reminders from the patient's last appointment to future appointments.

Box appointment folder id - The id of the appointment folder in the providers box.com account

Box DrChrono folder id - The id of the DrChrono root folder in providers box.com account

Box patient folder id - The id of the DrChrono patient folder in providers box.com account

Box store backup - Select to store the monthly doctor backup to their box.com account

Box sync clinical notes - Select to store a daily appointment list to their box.com account

Box sync strategy - Select to sync locked clinical notes to their box.com account

Default appt provider for staff - The default provider for appointments scheduled by staff

Default no clinical summary on referral - If selected, this will remove the patient's clinical summary on outgoing referral documents.

Enable billing facilities -This allows the provider to change the billing facility from the billing detail screen. Helpful when a provider is seeing patients in various settings where the facility code is different (example: hospital ER vs hospital inpatient vs hospital OR)

Enable billing provider - Allows provider to be listed as a billing provider

Enable Custom Insurance Plan Names - Allows practice groups to create custom insurance plan names

Enable custom vital signs - Allows custom vital signs (automatically enabled for plans Hippocrates and above)

Enable eCR - Enables automatic generation and transmission of case reports (a.k.a. electronic case reporting)

Enable institutional claim - Allows providers to bill institutional claims

Enable multi-primary insurance - This allows a practice group to have multiple primary insurances for patients. (used primarily by orthos, chiros, etc when a patient might be seen as part of an auto or work comp accident, but also for a non-accident related condition. Also useful with chiro claims where the benefits come from the payer, but the claim is processed by a third party such as American Speciality Health (ASH)

Enable note field defaults - Enables default fields in clinical note templates (aka - charting by exception)

Enable paper eobs - Enables transmitting of paper EOBs. Useful when a patient has dual insurance coverage

Enable standalone task creation - Need to enable in FRT, will create a separate tax for each lab result, eRx request, or OnPatient received.

Show/hide supervising provider dropdown - If checked, will hide provider dropdown. Can be overridden in doctor settings.

Enable updox - Will allow the use of Updox integration for the practice group. This setting also enables Direct Messaging to be set up by the practice group.

Enable user groups - Will allow user groups for practice group

Fax cover confidential - Check to include notice of confidentiality on outgoing fax cover sheets

Fax cover confidential text - To be used in conjunction with ^. This is the text that will show as the notice of confidentiality on outgoing fax cover sheets

Office for lab results - Select the office for lab results

OnPatient white label - will allow white labeling of OnPatient

Overlap check all calendar - Will prevent overlapping appointments on a per doctor basis

Patient payments transaction fee base - a flat per-transaction fee charged by DrChrono, in dollars

Patient payments transaction fee percentage - a percentage fee for transactions charged by DrChrono, by percentage

Patient statement billing phone - Phone number listed on patient statements for patients to use with questions regarding their invoice

Pg name reminder descriptor - If selected, will use the practice group name, instead of the individual provider name on OnPatient invites and reminders

Pg name statement descriptor - If selected, will use the practice group name, instead of the individual provider name on patient credit card statements

Force Patient Payments to Primary Provider - If selected, will force any patient payments posted to the primary provider listed on their account

Send statements on OnPatient - If selected, will send generated patient statements to OnPatient

Show all appointments credit card payments - If selected, will show all appointments in the dropdown for processing credit card payments

Show custom clinical template author - If selected, will show shared custom template author names

Task system version - Allows the selection of task system versions

TriZetto site id - Practice group's TriZetto site id. Required for claim submission and return ERA files.

Update patient group name number by rte - If selected, will update the patient's insurance information when a real-time eligibility is requested.

Update patient plan name by rte - If selected, will update the patient's plan name when a real-time eligibility is requested

Updox practice country - Country where the practice is located

Updox practice timezone - Timezone where the practice is located

Verify era before post - Providers in this PG should verify era $$ is received before posting (moved July 2023 from doc settings)

Vaccine threshold date -

Auto update crossover payer - Will automatically update the patient's secondary insurance after Medicare if it is listed on the Medicare EOB and not listed in the patient's account.

Enable manual follow up date -

Enable reminders - Will allow reminders

Stripe sync - Will sync Stripe accounts across the practice group

FigMD- Used to configure FigMD registries

Practice Group RCM Options

Tier level - Used by RCM team.. designates tier level based on MRR

Clearinghouse Enrollment

eProvider Solutions Enrollment - initiates enrollment with eProvider Solutions (ePS) clearinghouse