A Style Guide for Creating Content in DrChrono

07/24/2024 11:49 am EDT

The title and first 70 words of the article are very important for our search tools. Therefore, it is important to have keywords and synonyms at the beginning of the article. For example, if you are writing about forms, it is good to also use word templates.

This article will describe the format to follow for writing an article for our Knowledge Base.

Titles

Titles should reflect the main topic of the article and include key terms. Titles can be in the form of questions or statements.

1. Questions:

How do I add a patient?

Question titles should be in the correct format; not every word should be capitalized unless it is a proper noun.

Correct: How do I post a payment?

Incorrect: How Do I Post A Payment?

2. Statements:

Adding a New Patient to DrChrono

Statement titles should have capitalized words with the exception of:

- Articles - a, an, the **unless they are the first word**
- Prepositions - of, for, to, from, etc.

Correct: Posting a Payment to a Patient Account

Incorrect: Posting A Payment To A Patient Account

Section Titles

Section titles should be **bolded** and use Heading 3 or Heading 4 so they stand out. By using the headings, you can also link to them so that a user can skip right to the section they may need.

Paragraph ⌄   AA ⌄

Paragraph

Heading 1

Heading 2

Heading 3

Heading 4

To link to a section title, click on the link icon.

Paragraph ⌄   AA ⌄   A ⌄   B   *i*   U   ⅀   ⅀   ⦂   ≡ ⌄   🔗   🖾   ▶   ⊞ ⌄   </>

Pick the heading you need and the blue **Link** button.

Insert/edit link ✕

URL   **Heading**   Help Center article

Titles
Heading 4

Section Titles
Heading 4

Font and Paragraph
Heading 4

Numbering for Steps
Heading 4

Videos and Images
Heading 4

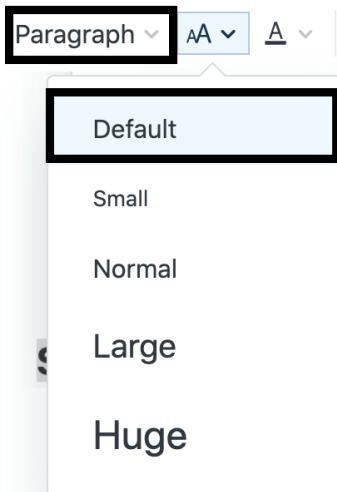**Spellings and Abbreviations**

Text on link

Section Titles

Cancel   Link

Font and Paragraph

The font and paragraph default settings are the ones that should be used to write articles. If you are editing an article, please be sure the set these so that our articles are easier to read.

When telling users where to go and for keywords, please **Bold** and **Capitalize** the terms. For example:

1. Go to **Clinical** > **Form Builder**.

2. Click on the **Additional** tab.

3. Once you have chosen the form, go to **Options** > **Set as Workflow Form**.

Numbering for Steps

When outlining steps in a process in the article, format your numbers as follows:

1. Use the number and a period after it.

2. Use 1 space after the period.

Videos and Images

1. Videos should be embedded at the beginning of the article after the intro, as in the example here.

The first 70 words or so should go here before the video. The key terms should be here first for an optimized search.
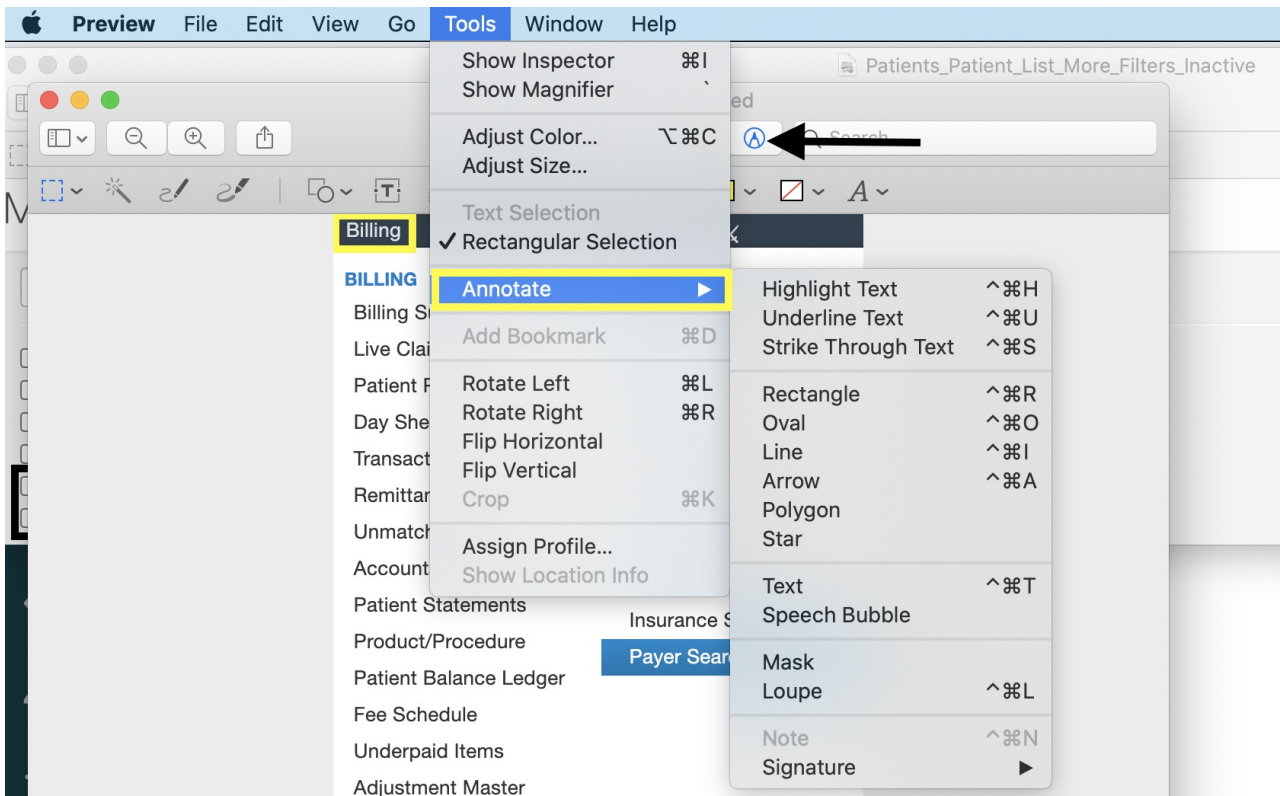
2. Images, like screenshots, should be used to show users where to go and what to do in DrChrono to accomplish the task. You can use the Preview tool to view and edit images.

Use the **Tools** to annotate the screenshot to direct users where to go.

To get to the tools, go to **Tools** > **Annotate** or click on the (

) icon.

- Use arrows, rectangles, or other shapes to point out elements on the screen.
- Please try not to use text on the screenshots.
- Use colors that stand out from the background.
- After inserting a video or image, please use 1 space (hit return twice) for the next line.
-

Spellings and Abbreviations

Both DrChrono and OnPatient should reflect the appropriate branding. If you need to use the Health Insurance Portability and Accountability Act abbreviation, please ensure it is **HIPAA**. Please use the correct formatting when creating a new article. Also, if you are editing an old article, please make sure all mentions of DrChrono and OnPatient are correct.

Correct: DrChrono, OnPatient, HIPAA, eRx, EPCS

Incorrect: drchrono onpatient HIPPA/HIPA, ERx/e-Rx, epcs, ePCS

When referring to a tab, for example, the Billing tab, tab should not be capitalized or bolded.

Adding Notes to an Article

You can add a make-a-note standout in an article by clicking on the (
 </>
) icon in the toolbar. You can use the code below and replace "Put your note info here." with the note information.

```
<div class="callout">Put your note info here.</div>
```

Here is an example:

> **Note:** The video visit link is valid 30 minutes **BEFORE** and 30 minutes **AFTER** the scheduled appointment.

  2. **During the video visit, the screen goes blank.**

Once the video visit has been joined by either party, it is best practice to wait for the either the patient or provider to wait for

Here is the code used in the example above. The text between the Text is coded for bold.

```
<div class="callout">
<strong>Note:</strong> The video visit link is valid 30 minutes <strong>BEFORE</strong>
and 30 minutes <strong>AFTER</strong> the scheduled appointment. 
</div>
```

Spacing

Please use one space between the lines (usually hitting the return button once). Two spaces are okay if it will improve the presentation. You can always click the **In progress, preview** button on the left to view the article and then make adjustments as necessary. Keep in mind the spacing will look different in the editor vs. the published viewer.

Make sure to leave a little white space between paragraphs of text and screenshots. Once you have published the article, go take a look at it in the knowledge base. Is it easy to read? Is it pleasing to the eye and not too busy?

Once you have completed your article, you can publish or submit it for review.

Zendesk Resources

Labels

Optimizing