

Account Settings in Detail

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In **Account Settings**, you can adjust and customize how you interact with your DrChrono account. The **Account Settings** page is divided into 10 tabs that handle different setting groups.

This article contains sections for each tab. Select the link below to go to the appropriate section.

Profile	General	Email	Medical Billing	eRx Info
Services	Usage	Sample Data	Security	Patient Payments

- To open the **Account Settings** page, select **Account > Account Settings**.
- To save your settings changes on any tab, select **Update Entire Profile** at the bottom of the page.

Profile

- Providers can enter basic information for their account on the **Profile** tab. This information populates in different areas of DrChrono.
- **Doctor ID**: Unique ID for the provider
- **Practice Group ID**: Unique ID for the practice. Multiple providers in the same practice have the same Practice Group ID.
- **DrChrono App Unlock PIN**: Used to unlock your iOS devices.
- **Support PIN**: When you contact the [DrChrono Support team](#), you must provide this four-digit PIN to verify your account identity.
- [Upload a profile picture and business logo](#) in the **Profile Images** section.

Account Settings

Profile

View

General

Email

Medical Billing

eRx Info

Services

Usage

Sample Data

Security

Patient Payments

Receipt Options

Doctor ID

123456

Practice Group ID

112233

First Name

Thomas

Changing your name can affect drug prescriptions & clinical notes. If you need to change your name, please contact DrChrono support for more details.

Last Name

Provider

Specialty

Family Practitioner

Job Title

Other

Timezone

(GMT-7:00) US - Pacific

Salutation

Suffix

Website

Home Phone

Office Phone

(720) 555-5555

Cell Phone

(720) 444-4444

Email Address

thomasp@email.xyz

Change Email

Password

Change Password

DrChrono App Unlock PIN

....

View/Edit

4-digit numeric PIN for unlocking the mobile EHR app from inactivity.

Support PIN

....

View

Generate New PIN

4-digit numeric PIN for account identity verification when you contact customer support.

Current Plan

Apollo

Profile Images

Profile Picture

Choose File

No file chosen

Will be attached to patient emails

Practice Business Logo

Choose File

No file chosen

Will be attached to emails & official forms

Display logo on faxes

☐

Display business logo on fax cover sheet

General

The settings under the General tab are divided into [Calendar Settings](#), [Appointment Settings](#), [Meaningful Use](#), [Clinical Notes](#), [Patient Vitals](#), and [Communications](#).

Calendar Settings

Calendar Settings

Display flag icon on appointment ☐ Display Flag icon on appointments when a patient/appointment has flag(s) associated

Display lock icon on appointment ☐ Display Lock icon on appointments when the clinical note is locked

Use new dashboard homescreen ☐ Uncheck to go straight to the calendar after logging in

Show user satisfaction survey ☒ Uncheck to opt out of user satisfaction surveys.

Default Office Default Office on Calendar

Duration of Exam Default duration of an exam in minutes

Duration of Follow-up Default duration of a follow-up exam in minutes

Examroom Calendar Increments Adjust minute increments on calendar

Date range on Appointment Template ☒ If true date range can be set for Appointment Template (starting from - ending by).

Appointment Templates in more views ☒ Show appointment templates in Daily View, Doctor View and Weekly View

Allow Exam Room Overlaps ☐ Allow appointments to overlap within an exam room

Global Overlap Checking ☐ Disallow overlapping appointments in any office or exam room

Appointment Default Color

Phonetic Name Used by automated phone system to pronounce doctor's name

Hide cancelled appointments ☐ Don't show cancelled appointments on appointment calendar (web only).

Hide rescheduled appointments ☐ Don't show rescheduled appointments on appointment calendar (web only).

Duplicate appointment warning ☐ Display a warning if a duplicate appointment is being created for a patient on the same day

Setting	Description
Display Flag Icon on Appointment Display Lock Icon on Appointment	Displays a lock or flag icon to show when a clinical note is locked or when a patient has flags on the calendar view. What do the lock and flag icons on my appointments mean?
Use New Dashboard Homescreen	When you log in to DrChrono you can be taken to the calendar or the dashboard with this setting. Learn more about the dashboard here .
Show User Satisfaction Survey	Allows you to opt in or out of receiving user satisfaction surveys.
Default Office	The default office sets the office for the provider's contact information that will appear on documents like the referrals and CCDA.
Duration of Exam	Sets the default appointment duration when scheduling an appointment for the provider.
Date range on Appointment Template	Allows you to set a start date and end date for the appointment templates on your calendar. How do I add a date range to my appointment templates?
Appointment Templates in More Views	Allows you to have appointment templates appear in all calendar views with the exception of monthly. Enabling Appointment Templates in All Calendar Views
Allow Exam Room Overlaps	Allows you to schedule appointments in the same exam room at the same time. How do I schedule multiple appointments in the same exam room at one time?

Global Overlap Checking	<p>This setting will not allow appointments to be double-booked in any exam room or office. If you do not want any double bookings at all, enable this setting.</p> <p>Enabling or Disabling Overlapping Appointments</p>
Appointment Default Color	<p>Sets a default appointment color of your choice for this provider's appointments</p> <p>How can I change the default appointment color?</p>
Phonetic Name	<p>Allows you to set the pronunciation of your name for reminders.</p> <p>How do I change the pronunciation of my name in appointment reminders?</p>
Hide Canceled Appointments Hide Rescheduled Appointments	<p>Enable this setting to hide canceled and rescheduled appointments from the calendar.</p> <p>Hiding Canceled and Rescheduled Appointments from the Schedule</p>
Duplicate Appointment Warning	<p>With this setting enabled you will get a warning window for appointments being scheduled for the same patient on the same day.</p> <p>Duplicate Appointment Warning</p>

Appointment Settings

Appointment Settings

Access to online scheduling	<input checked="" type="checkbox"/>	Allows patients to self-schedule appointments via onpatient
Patient's Statement Balance	<input checked="" type="checkbox"/>	Show patient's statement balance.
Patient's Current Balance	<input checked="" type="checkbox"/>	Show patient's current balance.
Claim's Billing Information	<input checked="" type="checkbox"/>	Show claim's billing information.
Patient's Insurance	<input checked="" type="checkbox"/>	Show patient's insurance payer.
Patient's Flag	<input checked="" type="checkbox"/>	Show patient flag.
Appointment Count	<input checked="" type="checkbox"/>	Show patient's appointments count.
Matched CDS Rules	<input type="checkbox"/>	Show patient's matched CDS rules.
Auto Appointment Reminders	<input checked="" type="checkbox"/>	Enable to automatically choose the patient's most recent reminders when scheduling appointments
Limit patient flags to appointment	<input type="checkbox"/>	Show relevant flags related to current appointment.
Auto-Run Eligibility	<input type="text"/>	How many days before the appointment an eligibility check should be run. If blank, no eligibility check will be run.

Setting	Description
Access to Online Scheduling	<p>This setting allows patients to schedule online through OnPatient or the scheduling widget.</p> <p>Enabling Online Scheduling in Your Office</p>

Patient's Statement Balance	<p>Allows you to display the patient's balance as a flag in the appointment window and generate a statement if needed.</p>  <p>Screenshot of the 'Schedule Appointment' window. The 'Appointment' tab is selected. The 'Type' dropdown is set to 'Appointment'. The 'Patient Statement Balance' is displayed as a flag: Patient Statement Balance: \$410.00 Generate Statement. Other flags include Credit: \$115.00, 121 past appointments, Primary Insurance: United HealthCare [87726], Secondary Insurance: PAI California Secondary [PAI02], and Fall Risk.</p>
Patient's Current Balance	<p>Allows you to display the patient's current balance as a flag in the appointment window.</p>  <p>Screenshot of the 'Schedule Appointment' window. The 'Appointment' tab is selected. The 'Type' dropdown is set to 'Appointment'. The 'Credit' is displayed as a flag: Credit: \$115.00. Other flags include 121 past appointments, Primary Insurance: United HealthCare [87726], Secondary Insurance: PAI California Secondary [PAI02], and Fall Risk.</p>
Claim's Billing Information	<p>Displays the billing information for claims in the billing tab of the appointment window.</p>  <p>Screenshot of the 'Schedule Appointment' window. The 'Billing' tab is selected. The 'Billing Status' is set to 'Bill Insurance'. The 'Patient Payment' is \$0.00. The 'Pre Authorization Approval' is 'Referral #'. The 'Payment Profile' is 'Insurance'. The 'Billing Pick List' is 'Choose Codes from Pick List'. The 'Diagnosis Pick List' is 'Choose Codes from PT Problems'. The 'Credit Card Payment' is 'Process Credit Card'. The 'HCFA Box 10 - Is patient's condition related to:' section includes 'Employment', 'Auto Accident', 'Other Accident', 'Onset Date Type', 'Onset Date', 'Other Date Type', and 'Other Date'. The 'Claim Billed' is \$3,084.52, 'Adjustment' is \$0.00, 'Insurer Paid' is \$0.00, and 'Patient Paid' is \$0.00.</p>
Patient's Insurance	<p>Shows flags in the appointment window for the patient's insurance.</p>  <p>Screenshot of the 'Schedule Appointment' window. The 'Appointment' tab is selected. The 'Type' dropdown is set to 'Appointment'. The 'Patient Statement Balance' is displayed as a flag: Patient Statement Balance: \$410.00 Generate Statement. Other flags include Credit: \$115.00, 121 past appointments, Primary Insurance: United HealthCare [87726], Secondary Insurance: PAI California Secondary [PAI02], and Fall Risk.</p>
Patient's Flag	<p>Allows you to display patient flags in the appointment window.</p> <p>Patient Flags</p>
Appointment Count	<p>Allows you to view the number of past appointments the patient has had as a flag in the appointment window.</p>  <p>Screenshot of the 'Schedule Appointment' window. The 'Appointment' tab is selected. The 'Type' dropdown is set to 'Appointment'. The '121 past appointments' is displayed as a flag. Other flags include Patient Statement Balance: \$410.00 Generate Statement, Credit: \$115.00, Primary Insurance: United HealthCare [87726], Secondary Insurance: PAI California Secondary [PAI02], and Fall Risk.</p>

Matched CDS Rules	<p>Enable this setting to view flags based on Clinical Decision Support rules.</p> <p>CDS Rule Flags in the Appointment Window</p>
Auto Appointment Reminders	<p>With this setting enabled the patient's most recent reminders will be automatically selected as the outgoing reminders for this appointment.</p>
Limit Patient Flags to Appointment	<p>With this setting enabled, only flags associated with the current appointment will be displayed in the appointment window.</p> <p>How do I add a patient flag to an appointment?</p>
Autorun Eligibility	<p>Allows you to enter a number of days to autorun eligibility before an appointment.</p> <p>Save Time with Auto Eligibility Checks</p>

Meaningful Use

Meaningful Use



Severity Level of Interventions

All



Display the drug-drug, drug-allergy interaction when severity level is higher than or equal to

Gender & Identity



Hide Gender & Identity dropdowns for DrChrono web and onpatient/check-in applications

Setting	Description
Severity Level of Interventions	Select the severity level to display drug-drug and drug-allergy interactions.
Gender and Identity	<p>Show or hide the dropdown menus for gender and identity in the patient chart, OnPatient check-in, and the check-in app.</p> <p>Adding Gender Identity and Sexual Orientation to the Check-In App</p>

Clinical Notes

Clinical Notes ?

- ☒ Include Practice Official Name ☒ Print practice official name in header. Name can be set in "Medical Billing" Tab
- Include Business Logo Top Left
- ☐ Include Patient Chart Photo
- ☒ Include Office Information ☒ Include office name and address in the headers of clinical notes
- ☐ Include Payer IDs ☐ Include primary and secondary payer IDs in the headers of clinical notes
- ☒ Include Lab Orders and Results ☒ Show Lab Orders and Results in the plan section of clinical notes
- ☒ Reduce Header and Footer Font Size
- ☐ Move Non-SOAP FreeDraws to End
- ☐ Default to CDC Growth Charts
- ☐ Hide Medications & Allergies by Default
- ☐ Hide CPT & ICD on Clinical Notes by Default
- ☐ Allow Chief Complaint to be Persistent
- ☒ Preview Previous Note ☒ Show the information that will be copied from a previous note in the selection screen.
- ☐ Supervising Provider ☐ * Can sign other provider's notes. Not editable by customer. Please contact [support](#) if you want to change this flag.

Setting	Description
Include Practice Official Name	Adds the practice name from the medical billing tab on the clinical note. (See below)
Include Business Logo	Allows you to add your business logo to the top of the clinical note. (See below)
Include Patient Chart Photo	Includes the patient's profile photo from their chart on the clinical note. (See below)
Include Office Information	Adds the office information to the clinical note header (See below)
Include Payer IDs	Add the patient's primary and secondary payer IDs to the clinical note. (See below)



Family Practice



Patient: Laurie T. Sample
Provider: Dr. James Smith
Office: Office 2
Primary Payer ID: 87726

DOB: 12/08/1990 **Sex:** F
Visit: 06/09/2023 8:00AM **Chart:** SAJA000001
Address: 345 Fake Street, Baltimore, MD, 12345
Secondary Payer ID: PAI02

Clinical Note Settings Continued

Setting	Description
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Include Lab Orders and Results	<p>Allows you to show lab orders and results in the plan section of the note.</p> <p>Plan:</p> <p>Lab Results:</p> <table><tr><th>Test</th><th>Normal Range</th><th>2023-03-28</th><th>2022-03-31</th><th>2022-02-24</th><th>2019-04-04</th></tr><tr><td>LOINC 11502-2 Laboratory report</td><td>8-12</td><td>-</td><td>14 mg/dl</td><td>10 Units</td><td>-</td></tr><tr><td>LOINC 14563-1 Hemocult sp1 SII Qi</td><td>5-15</td><td>10 ml</td><td>-</td><td>-</td><td>-</td></tr><tr><td>Sample Lab - 123456 Sample Test #1</td><td>-</td><td>-</td><td>-</td><td>-</td><td>Not detected</td></tr><tr><td>Sample Lab - 456789 Sample Test #4</td><td>-</td><td>-</td><td>-</td><td>-</td><td>Outlook not so good</td></tr><tr><td>Sample Lab - 678901 Sample Test #6</td><td>-</td><td>-</td><td>-</td><td>-</td><td>4.82 mL</td></tr></table>	Test	Normal Range	2023-03-28	2022-03-31	2022-02-24	2019-04-04	LOINC 11502-2 Laboratory report	8-12	-	14 mg/dl	10 Units	-	LOINC 14563-1 Hemocult sp1 SII Qi	5-15	10 ml	-	-	-	Sample Lab - 123456 Sample Test #1	-	-	-	-	Not detected	Sample Lab - 456789 Sample Test #4	-	-	-	-	Outlook not so good	Sample Lab - 678901 Sample Test #6	-	-	-	-	4.82 mL
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Reduce Header and Footer Font Size	<p>Allows you to reduce the size of the header and footer fonts.</p> <p>Reducing the Header and Footer Size on a Clinical Note</p>																																				
Move Non-SOAP Freedraws to End	<p>Allows you to move the images used in freedraw fields to the end of the note.</p> <p>Detailed Clinical Note Formatting</p>																																				
Default to CDC Growth Charts	<p>Enable this setting to default to the CDC's growth charts in the account.</p> <div><div><div><div></div></div><div>Tim Patient (Male 1 week, 1 day 06/05/2023 PATI000001)</div><div>Chief Complaint</div></div><div><div><div>Apple Health App Data</div><div>Growth Charts</div></div><div><div><div>✓ CDC</div><div>WHO</div><div>Fenton Downs-Syndrome</div><div>Pre-Term</div></div><div><div>BMI for Age</div><div>BMI for Age</div></div></div></div></div>																																				
Hide Medications and Allergies by Default	<p>You can hide a patient's medications and allergies from the clinical note.</p> <p>How do I hide medications and allergies from the clinical note?</p>																																				
Hide CPT and ICD on Clinical Notes by Default	<p>Allows you to hide CPT and ICD-10 diagnosis codes from the clinical note.</p> <p>Excluding Diagnosis and Billing codes from Clinical Notes</p>																																				

Allow Chief Complaint to be Persistent	<p>With this setting enabled, the patient's chief complaint (the reason for visit in the appointment window) will automatically populate the 'chief complaint' field in the clinical note and the 'reason for visit' field in the appointment window. This information is pulled from the most recent visit.</p>
Preview Previous Note	<p>When enabled, a preview of the contents of the previous note will display when you hover over the form in the selection screen.</p> <div> <div> <p>Previous note data:</p> <p>HPI: Laurie T. Sample's physical exam was normal.</p> <p>General: True</p> <p>General [-]: no significant weight change,no weakness,no fatigue,no fever</p> <p>General [+]:</p> <p>Comments:</p> <p>Skin: True</p> <p>Skin [-]: no rash,no lumps,no sores,no itching,no dryness,no color change,no changes in hair or nails</p> <p>Skin [+]:</p> <p>Comments:</p> <p>HEENT: True</p> <p>HEENT [-]: no headache,no head injury,no dizziness,no lightheadedness,no vision changes,no hearing problems,no tearing ,no tinnitus,no vertigo,no earaches,no nasal stuffiness,...</p> <p>HEENT [+]:</p> <p>Comments:</p> <p>Neck: True</p> <p>Neck [-]: no lumps,no lymphadenopathy,no goiter,no pain,no stiffness</p> </div> <div> <p>06/14/2023</p> <p>Sections:</p> <p>SOAP</p> <p><input checked="" type="checkbox"/> Subjective</p> <p><input checked="" type="checkbox"/> Objective</p> <p><input type="checkbox"/> Assessment</p> <p><input type="checkbox"/> Plan</p> <p>on Screen <input type="checkbox"/> Testing for App</p> <p><input type="checkbox"/> Discharge Samp</p> <p>test <input type="checkbox"/> Consultation Not</p> </div> </div>

Patient Vitals

The Patient Vitals settings allow you to set default metric or customary units for weight, height, head circumference, and temperature when you enter vitals.

Patient Vitals

Vitals Weight Unit	kg	Can be overwritten for specific patient (and saved)
Vitals Height Unit	cm	Can be overwritten for specific patient (and saved)
Vitals Head Circumference Unit	cm	Can be overwritten for specific patient (and saved)
Vitals Temperature Unit	c	Can be overwritten for specific patient (and saved)

Communications

Record Provider Name: By default, users can record the name of the provider when appointment reminder calls are sent to patients.

Communications

Recorded Provider Name

▶ 0:00 / 0:00

Record

Use official name on fax cover sheets
☐

Include notice of confidentiality on faxes and patient emails
☐

Notice to include

The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the exclusive use of the addressee(s). If you are not the addressee (or one of the addressees), you are not an intended recipient; if you are not an intended recipient, you

Enable sending non-free referral faxes
☐

Include Patient Problems in referrals by default
☒

Remove "Powered by drcrono" from Footer of Clinical Notes and Patient Statements
☐

Allow patients to confirm or cancel appointments from appointment reminder emails
☐

Direct Messaging

+ Set up your Direct Address

Update Entire Profile

Use Organization Name On Reminder: Users must contact support to create an administrative role to enable the option to display the organization name on reminders and patient invitations.

If users do not want the organization name to display or be included in onpatient invites, they will need to uncheck the box to Use Organization Name On Reminders and Onpatient Invites

Communications

Use Organization Name On Reminders and Onpatient Invites
☒

Organization Name
Cunningham Family Practice

Recorded Organization Name

▶ 0:00 / 0:00

Record

Use official name on fax cover sheets
☐

Include notice of confidentiality on faxes and patient emails
☐

Notice to include

Recording the

Setting	Description
Recorded Provider Name	You can make a recording of your name. The recording will play within the voice reminder when it announces your name as the provider. For example, "You have an appointment with "RECORDED NAME" on Wednesday".
Use Organization Name On Reminder	<p>Users must contact support to create an administrative role to enable the option to display the organization name on reminders and patient invitations.</p> <p>If users do not want the organization name to display or be included in onpatient invites, they will need to uncheck the box to Use Organization Name On Reminders and Onpatient Invites</p>

Use Official Name on Fax Cover Sheets

With this setting enabled the practice name will appear on the fax cover sheet instead of the provider's name.

Attention:

Dr. James Smith

Fax: +1 650-555-5555

Fax From:

Family Practice ←

Phone: (443) 555-5555

Fax: +1 (620)-555-5555

Email:

sample.email@drchrono.com

Date: 2023-06-14 11:47:29 AM

Include Notice of Confidentiality on Faxes and Patient Emails

1. Enter your confidentiality notice in the text box.


2. Enable the setting to display your confidentiality notice on faxes and emails.


[How do I add a confidentiality notice to the bottom of all outgoing faxes and emails?](#)

Enable Sending Non-free Referral Faxes

With this enabled, only the "fax referral" option will appear when sending a referral.

Sign your referral (Optional)




☒ Save Signature 


Preview

Fax Referral


With this setting disabled, you are able to send a fax to the recipient with instructions on how to download the referral by selecting "Send Referral (free)".

Sign your referral (Optional)



☒ Save Signature 

Preview

Fax 

Direct Message

Fax Referral

Send Referral (free)


show001013542#

Include Patient Problems in Referrals by Default

Allows you to include patient problems in referrals by default.

With this setting disabled, the "problems" checkbox when sending a referral will be unchecked.

☒ Include Referral Summary ⓘ

<input checked="" type="checkbox"/>	Data To Include in Referral Summary
<input checked="" type="checkbox"/>	Patient name: Tim Patient
<input checked="" type="checkbox"/>	Sex: Male
<input checked="" type="checkbox"/>	Birthdate: June 5, 2023
<input checked="" type="checkbox"/>	Race: None known
<input checked="" type="checkbox"/>	Ethnicity: None known
<input checked="" type="checkbox"/>	Preferred language: None known
<input checked="" type="checkbox"/>	Smoking status: None known
<input type="checkbox"/>	Problems:  Bite of turtle

Remove "Powered by DrChrono" from the Footer of Clinical Notes and Patient Statements

Enable this setting to remove the Powered by DrChrono from patient statements and clinical notes.

Allow Patients to Confirm or Cancel Appointments from Appointment Reminder Emails	<p>With this enabled, patients will be able to click on a link to confirm or cancel their appointment.</p> <div> <div>Appointment with James Smith</div> <div>June 14, 2023 at 2:00 p.m.</div> <div> <div> Doctor James Smith Office 225 Schilling Circle Hunt Valley, MD 21031 When June 14, 2023 at 2:00 p.m. Website http://www.drchrono.com Contact (443) 555-5555 </div> <div> <div>Confirm Appointment</div> <div>Cancel Appointment</div> </div> </div> </div>
Direct Messaging	<p>Click on the "+Set Up Your Direct Address" to set up Direct Messaging.</p> <p>Setting Up Direct Messaging</p>

Email

Incoming Email

Daily Agenda Emails	<input checked="" type="checkbox"/> Send a HIPAA compliant daily agenda email	
Daily Billing Problems Emails	<input checked="" type="checkbox"/> Send a daily billing problems email	
Recipients of Billing Email	<div>sample.billing@samplepractice.com, practice.manager@samplepractice.com</div>	Recipients of daily billing problems email, separated by comma ",", or space " ". Leave blank to use default setting.
Online Scheduling Emails	<input type="checkbox"/> Send an email each time an appointment is scheduled online	
Recipients of Online Scheduling Notification	<div>scheduling@samplepractice.com, doctor1@samplepractice.com</div>	Recipients of the online scheduling notifications email, separated by comma ",", or space " ". Leave blank to use default setting.
Include Notes in Emails	<input checked="" type="checkbox"/> Reason and notes will be included in daily emails	

Outgoing Email

Use Alternative Email for Fax	<input type="checkbox"/> Using alternative email address for fax and referral	
Alternative Email for Fax	<div></div>	Alternative email address displayed in fax and referral
Custom Email Signature	<div></div>	
Recurring Reminders	<input type="checkbox"/> Send Recurring Appointment Reminders	

Update Entire Profile

Setting	Description
Daily Agenda Emails	Enable this setting to receive an email that has a schedule of your appointments for the day. Daily Agenda Email
Daily Billing Problems Emails Recipients of Billing Email	With this enabled, you can receive a daily email that details the unresolved billing claims and a list of unbilled appointments. Enter the email address of those in your practice who need to receive this email. Managing Your Daily Billing Problems Email


Online Scheduling Email

Recipients of Online Scheduling Notification

Enable this setting to receive an email when a patient schedules an appointment through the online scheduling widget.





Enter the email address of those in your practice who need to receive this email.

A patient has scheduled an appointment in your office: Office 1.



reminders@drchrono.com <reminder...>

To: Sample Doctor



Today at 9:55 AM

Dear Dr. James Smith,

A patient has scheduled a new appointment in your office, Office 1, through drchrono's online scheduling widget.

The appointment has been scheduled for Friday June 16 at 08:00AM by the patient.

You can view the appointment record here:
<https://drchrono.com/appointments/257344054>

This appointment scheduling powered by: <https://drchrono.com>

Include Patient Notes in Emails

With this setting enabled, receiving your daily agenda email will include any note entered into the "Note" field in the appointment window.

Daily Agenda for Dr. James Smith as of 6:05AM



no-reply@drchrono.com <no-reply@...

Today at 8:05 AM


To: sample.doctor@fakepractice.com

My Day

Dr. James Smith: My schedule for **Thu Jun, 15 2023**.

Office 1

07:50 AM - 08:20 AM Patient in Exam 1: Dolphin Bite Testing for notes on daily agenda.	Dr. James Smith
08:20 AM - 08:50 AM Patient in Exam 1: Followup Appointment Testing for notes in daily agenda.	Dr. James Smith
12:00 PM - 12:30 PM Scheduled Break: Lunch	Dr. James Smith

<p>Use Alternative Email for Fax</p> <p>Alternative Email for Fax</p>	<p>By default, the email address for the provider will be included on faxes. With this setting enabled you can use an alternate email. Check the box and enter the email address in the field provided.</p> <p>Attention:</p> <p>Dr. James Smith Fax# +1 650-555-5555</p> <hr/> <p>Fax From:</p> <p>Family Practice Phone: (443) 555-5555 Fax: +1 (620)-555-5555 Email: alternative.email@fakepractice.com Date: 2023-06-15 10:22:39 AM</p> <hr/> <p>Total Pages: 4 <i>Faxed from DrChrono EHR</i></p> <hr/> <p>Notice of Confidentiality</p> <p>The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the exclusive use of the addressee(s). If you are not the addressee (or one of the addressees), you are not an intended recipient; if you are not an intended recipient, you hereby are notified that any use, disclosure, dissemination, distribution (other than to the addressee(s)), copying or taking of any action because of this information is strictly prohibited.</p>
<p>Custom Email Signature</p>	<p>With DrChrono's Send Email feature, you can send email messages to your patients. You can customize the signature that appears on the email.</p> <div data-bbox="810 1115 1439 1182">  <div> reminders@drchrono.com <reminde... Today at 10:42 AM </div> <div> To: fake.patient@notreal.com </div> </div> <p>Dear Laurie Sample,</p> <p>Our office will be closed on Tuesday, July 4th for the Independence Day holiday.</p> <p>We will open at 8:00 a.m. on Wednesday, July 5th.</p> <p>Enjoy the holiday.</p> <div data-bbox="810 1534 1147 1630"> <div>Sample Doctor</div> <div>Check out my custom email signature.</div> </div> <p>The information contained in this transmission is confidential. This transmission and the information contained in or attached as a file to it is intended for the exclusive use of the addressee(s). If you are not the addressee (or one of the addressees), you are not an intended recipient; if you are not an intended recipient, you hereby are notified that any use, disclosure, dissemination, distribution (other than to the addressee(s)), copying or taking of any action because of this information is strictly prohibited.</p> <p>Powered by  drchrono</p> <p>Click here to unsubscribe from messages from this provider. The doctor will be notified you no longer wish to receive reminders about</p>
<p>Recurring Reminders</p>	<p>Enable this setting to send reminders for recurring appointments.</p>

Medical Billing

Medical Billing is where you enter your billing information and complete your billing setup.

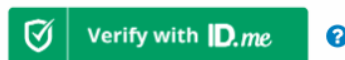
[Medical Billing Account Settings](#)

eRx Info

Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) [Sample Data](#) [Security](#) [Patient Payments](#)

Register for eRx



Prescriber Info

State License Number	<input type="text" value="123456789"/>
DEA Number	<input type="text" value="ABC123"/>
Narcotics Addiction DEA Number (NADEAN)	<input type="text" value="8888888"/>
Prescribing Physician's Name	<input type="text"/> <small>The prescribing physician's name displayed in eRx. Leave blank if the same as user's name.</small>
Physician Date of Birth	<input type="text" value="06/14/1979"/>
Medicaid Provider Number	<input type="text" value="123456ABC"/>

[Update Entire Profile](#)

To register for eRx, click on the **Verify with ID.me** button. For more information on the registration process see our articles on eRx and EPCS setup.

Under the **Prescriber Info** section, you can enter your prescriber information into the fields.

[Setting Up eRx with ID.me](#)

[Setting Up EPCS with ID.me](#)

Services

Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) [Sample Data](#) [Security](#) [Patient Payments](#)

Calendar Sync

Calendar URL https://drchrono.com/external_calendar/248094/a78cd9926a2c504fa6603e8b310ce834.ics [Copy](#)

Per-office calendar links can be found on the [Manage offices](#) page.

Instructions: [Google Calendar](#) | [Apple iCal](#) | [Microsoft Outlook](#)

Calendar Sync allows you to sync out (one way) your DrChrono schedule to a Google Calendar, Apple iCal, or Microsoft Outlook.

[How do I sync my DrChrono calendar to my Google Calendar?](#)

Usage

Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) [Sample Data](#) [Security](#) [Patient Payments](#)

Current Usage [1 provider(s)]

02/15/2021 – 03/14/2021

Description	Usage	Overage charge
Fax	0 / 1,000	\$ 0.05 per page
SMS	0 / 300	\$ 0.05 per text
Phone	0 / 300	\$ 0.15 per phone call
Peer 2 peer telemedicine videocall	0 / 0	\$ 0.00 per call

The Usage tab shows you the number of faxes, SMS text messages, phone reminders, and video visits.

[How do I see how many faxes, text messages, and phone calls I have sent?](#)

Sample Data

Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) **Sample Data** [Security](#) [Patient Payments](#)

Sample Data

Add sample data to your account (can be easily removed later)

Turn on sample data

Turn on sample data (MU)

Remove sample data from account (only sample data will be removed)

Turn off sample data

Enable Billing demo data

Turn ON billing demo data

Update Entire Profile

Sample Data populates your account with a series of fake patients you can work with to get to know how to use DrChrono without having to worry about using live patients.

[Turning On and Turning Off Your Sample Data](#)

Security

Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) [Sample Data](#) **Security** [Patient Payments](#)

Two Factor Authentication

Status: Disabled

Your Authy account will be tied to your email and cell phone (only one Authy account per email and cell phone).

When you enable 2-Factor Authentication, an Authy account will be created and tied to your cell phone and email address.

Please download Authy on your mobile device:



Email to use: **sample.fake@fakepractice.com**

Cell phone to use: **(410) 555-5555**

Current password

Under the Security tab, you can set up 2-factor authentication for your account. With 2-factor authentication, you can add an additional safeguard to your account.

[How do I set up 2-factor authentication in my account?](#)

Patient Payments

Account Settings

[Profile](#) [General](#) [Email](#) [Medical Billing](#) [eRx Info](#) [Services](#) [Usage](#) [Sample Data](#) [Security](#) [Patient Payments](#)

General

Require balance


☒ Require an outstanding patient balance for credit card payments

DrChrono Payments

☐ Use individual doctor's setting (if turned off, will use practice group's defaults)

Current Default Merchant

Enroll Additional DrChrono Payments Merchant Account



Allow onpatient payments

☒ Allow patients with onpatient access to make payments through the onpatient portal

onpatient payment default

DrChrono Payments

Minimum onpatient payments

5.00

Set minimum amount for payments from onpatient

Auto Allocations

Auto Allocate

☒ Automatically allocate to line items when patient balance is available.

Auto un-allocate

☐ Automatically un-allocate overpaid line items.

Use other appointment payments

☐ Use payments set aside for other appointments during allocations.

Update Entire Profile

Setting	Description
Require Balance	With this setting enabled, patients will need to have a balance before they can make a payment online.
DrChrono Payments	<p>DrChrono's integrated payment processor allows you to process credit cards for patient payments.</p> <p>DrChrono Payments: How to set up your account</p>
OnPatient <ul style="list-style-type: none">Allow Patient PaymentsOnPatient Payment DefaultMinimum OnPatient Payments	<p>If you are going to accept payments through OnPatient, you need to enable the settings to accept payments online, select DrChrono Payments to process, and enter a minimum payment amount.</p> <p>Enabling Patient Payments in OnPatient</p>
Auto Allocations <ul style="list-style-type: none">Auto AllocateAuto un-allocateUse other appointment types	<p>The auto-allocate feature allows you to automatically apply payments to line items for a patient.</p> <p>Patient Payments Auto Allocation FAQ</p>

