Account Settings in Detail

Last modified on 10/22/2024 6:01 pm EDT

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.

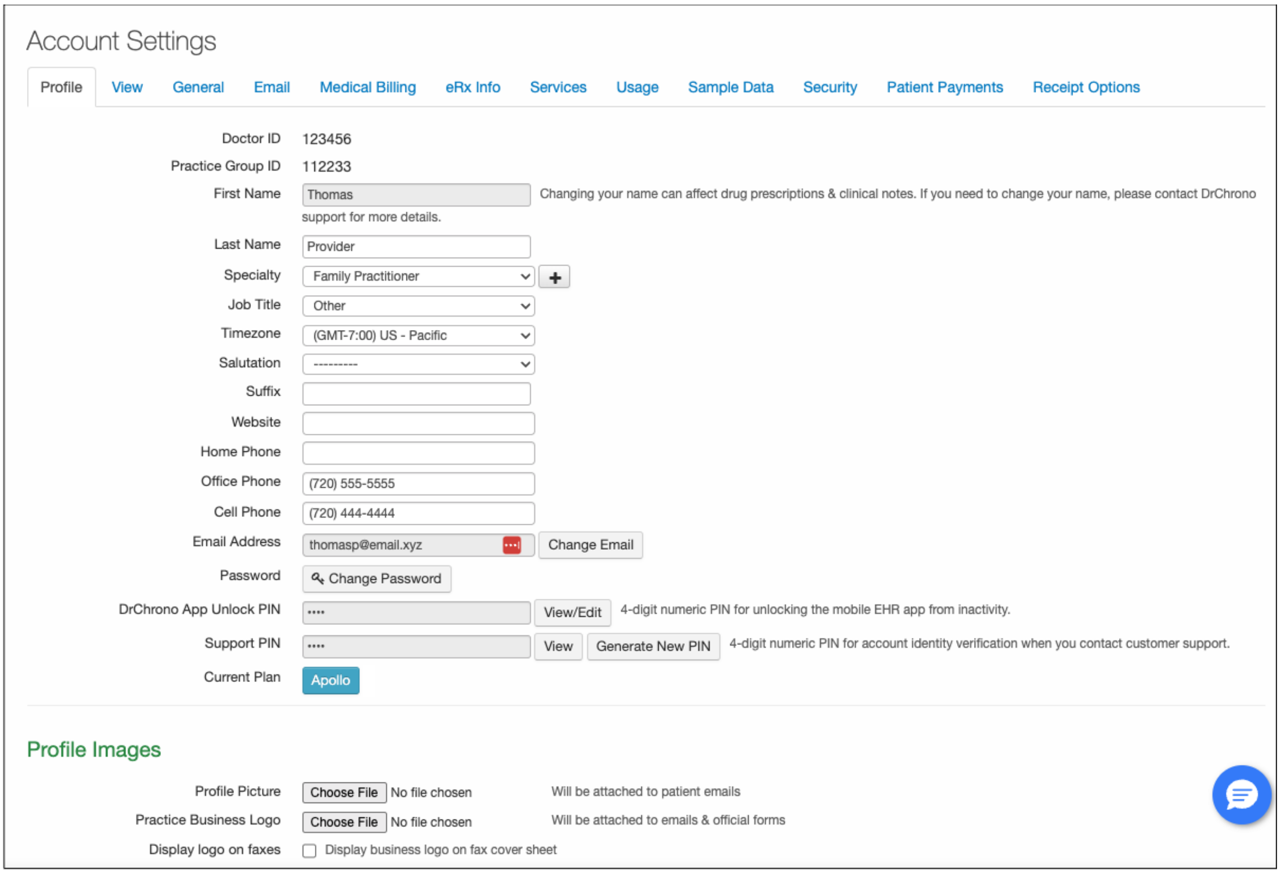
This article contains sections for each tab. Select the link below to go to the appropriate section.

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

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

Profile

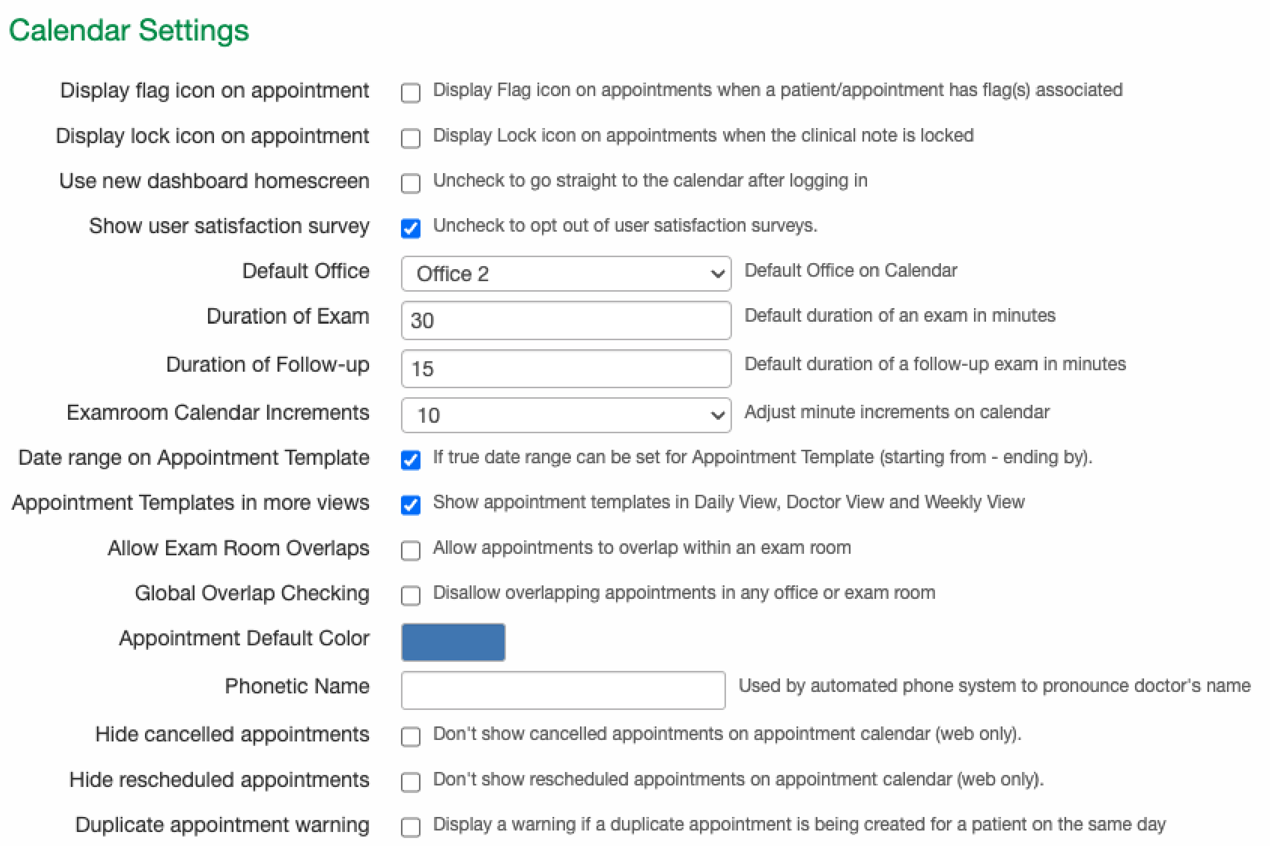
- Providers can enter basic information for their account on the **Profile** tab. This information populates in different areas of DrChrono.
- **Doctor ID:** Unique ID for the provider
- **Practice Group ID:** Unique ID for the practice. Multiple providers in the same practice have the same Practice 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.



General

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

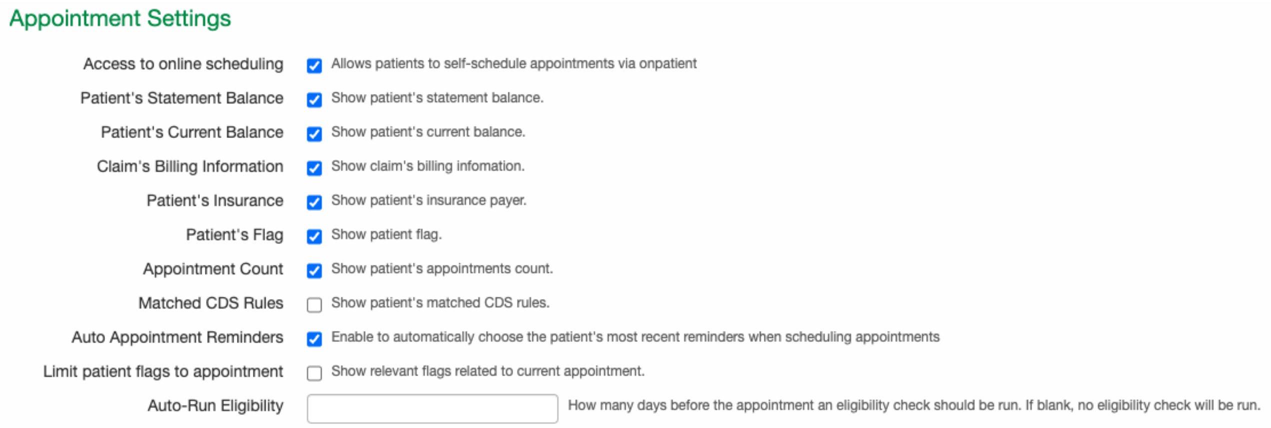
Calendar Settings

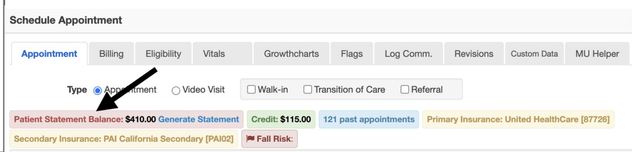
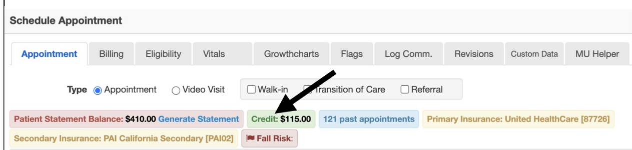
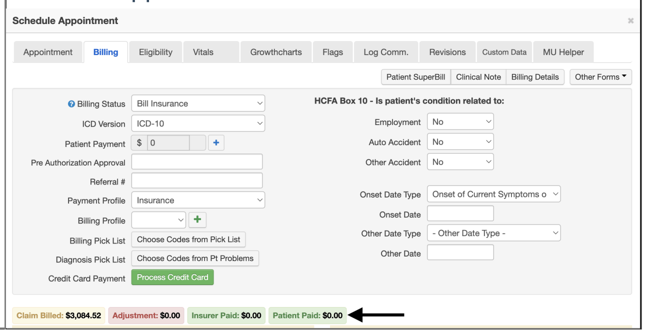


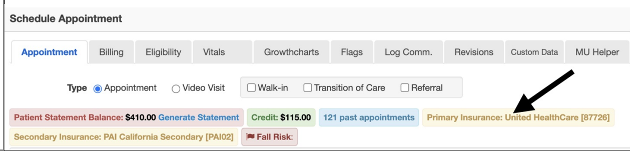
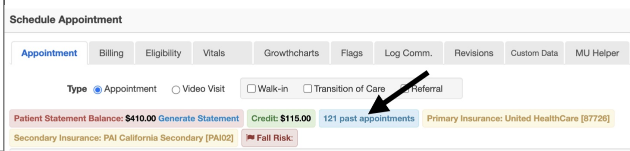
Setting	Description
Display Flag Icon on Appointment Display Lock Icon on Appointment	Displays a lock or flag icon to show when a clinical note is locked or when a patient has flags on the calendar view. What do the lock and flag icons on my appointments mean?
Use New Dashboard Homescreen	When you log 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	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. Enabling or Disabling Overlapping Appointments
Appointment Default Color	Sets a default appointment color of your choice for this provider's appointments How can I change the default appointment color?
Phonetic Name	Allows you to set the pronunciation of your name for reminders. How do I change the pronunciation of my name in appointment reminders?
Hide Canceled Appointments Hide Rescheduled Appointments	Enable this setting to hide canceled and rescheduled appointments from the calendar. Hiding Canceled and Rescheduled Appointments from the Schedule
Duplicate Appointment Warning	With this setting enabled you will get a warning window for appointments being scheduled for the same patient on the same day. Duplicate Appointment Warning

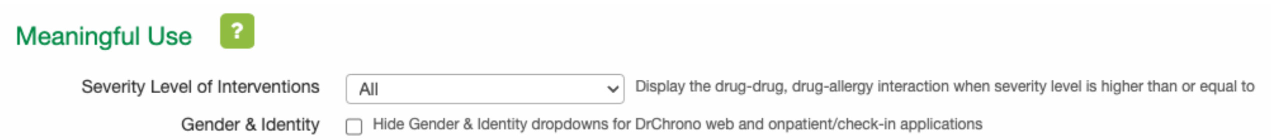
Appointment Settings



Setting	Description
Access to Online Scheduling	This setting allows patients to schedule online through OnPatient or the scheduling widget. Enabling Online Scheduling in Your Office
Patient's Statement Balance	Allows you to display the patient's balance as a flag in the appointment window and generate a statement if needed. 
Patient's Current Balance	Allows you to display the patient's current balance as a flag in the appointment window. 
Claim's Billing Information	Displays the billing information for claims in the billing tab of the appointment window. 

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

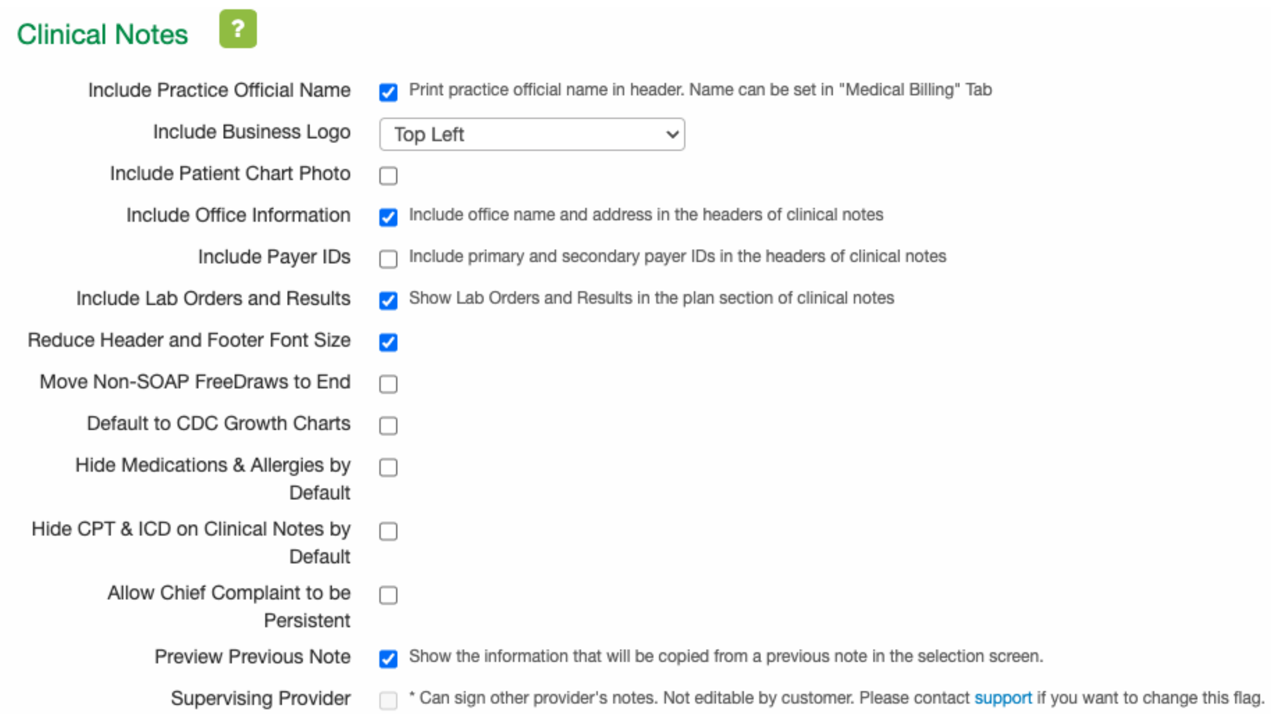
Meaningful Use



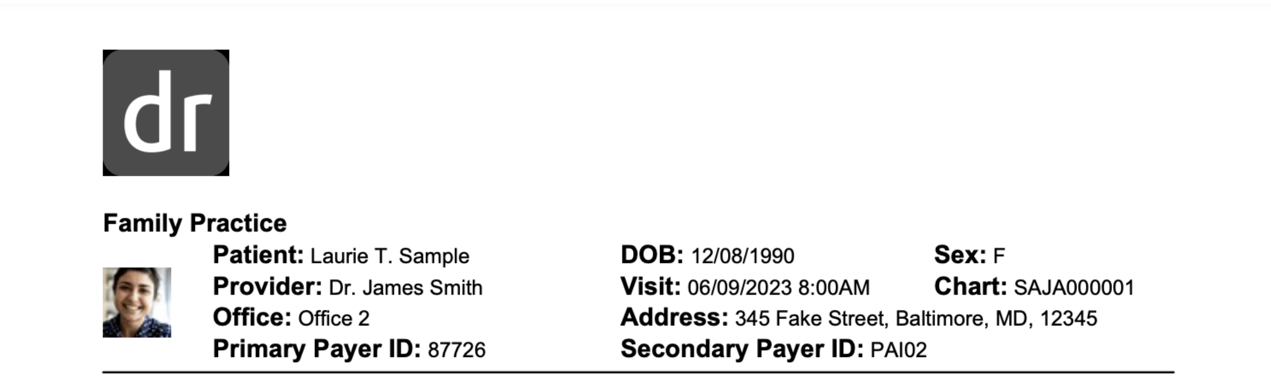
Setting	Description
Severity Level of Interventions	Select the severity level to display drug-drug and drug-allergy interactions.

Gender and Identity	Show or hide the dropdown menus for gender and identity in the patient chart, OnPatient check-in, and the check-in app. Adding Gender Identity and Sexual Orientation to the Check-In App

Clinical Notes

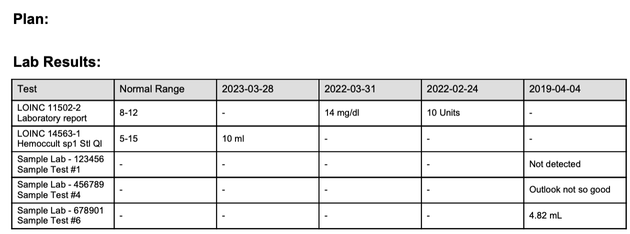


Setting	Description
Include Practice Official Name	Adds the practice name from the medical billing tab on the clinical note. (See below)
Include Business Logo	Allows you to add your business logo to the top of the clinical note. (See below)
Include Patient Chart Photo	Includes the patient's profile photo 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)



Clinical Note Settings Continued

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Include Lab Orders and Results</td><td>Allows you to show lab orders and results in the plan section of the note.



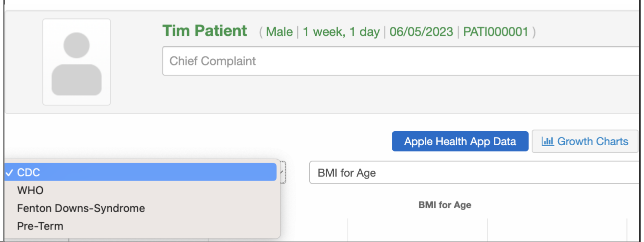
Plan:

Lab Results:

<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 Hemoccult sp1 Stl Ql</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></td></tr>
<tr><td>Reduce Header and Footer Font Size</td><td>Allows you to reduce the size of the header and footer fonts.

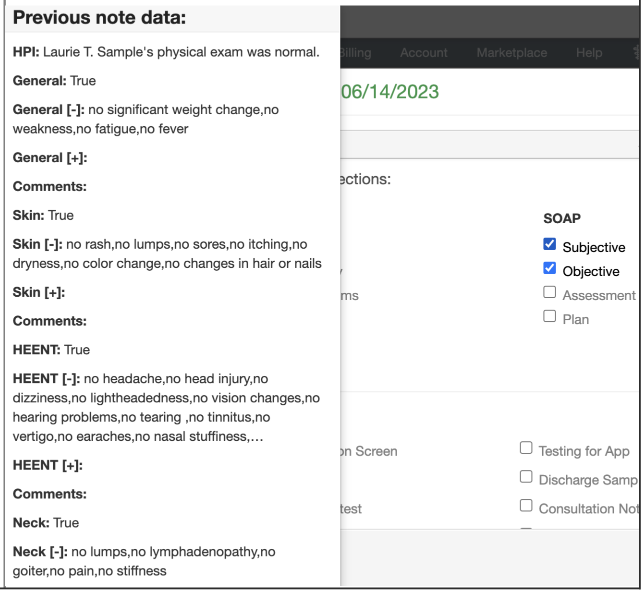
Reducing the Header and Footer Size on a Clinical Note</td></tr>
<tr><td>Move Non-SOAP Freedraws to End</td><td>Allows you to move the images used in freedraw fields to the end of the note.

Detailed Clinical Note Formatting</td></tr>
<tr><td>Default to CDC Growth Charts</td><td>Enable this setting to default to the CDC's growth charts in the account.


</td></tr>
<tr><td>Hide Medications and Allergies by Default</td><td>You can hide a patient's medications and allergies from the clinical note.

How do I hide medications and allergies from the clinical note?</td></tr>
<tr><td>Hide CPT and ICD on Clinical Notes by Default</td><td>Allows you to hide CPT and ICD-10 diagnosis codes from the clinical note.

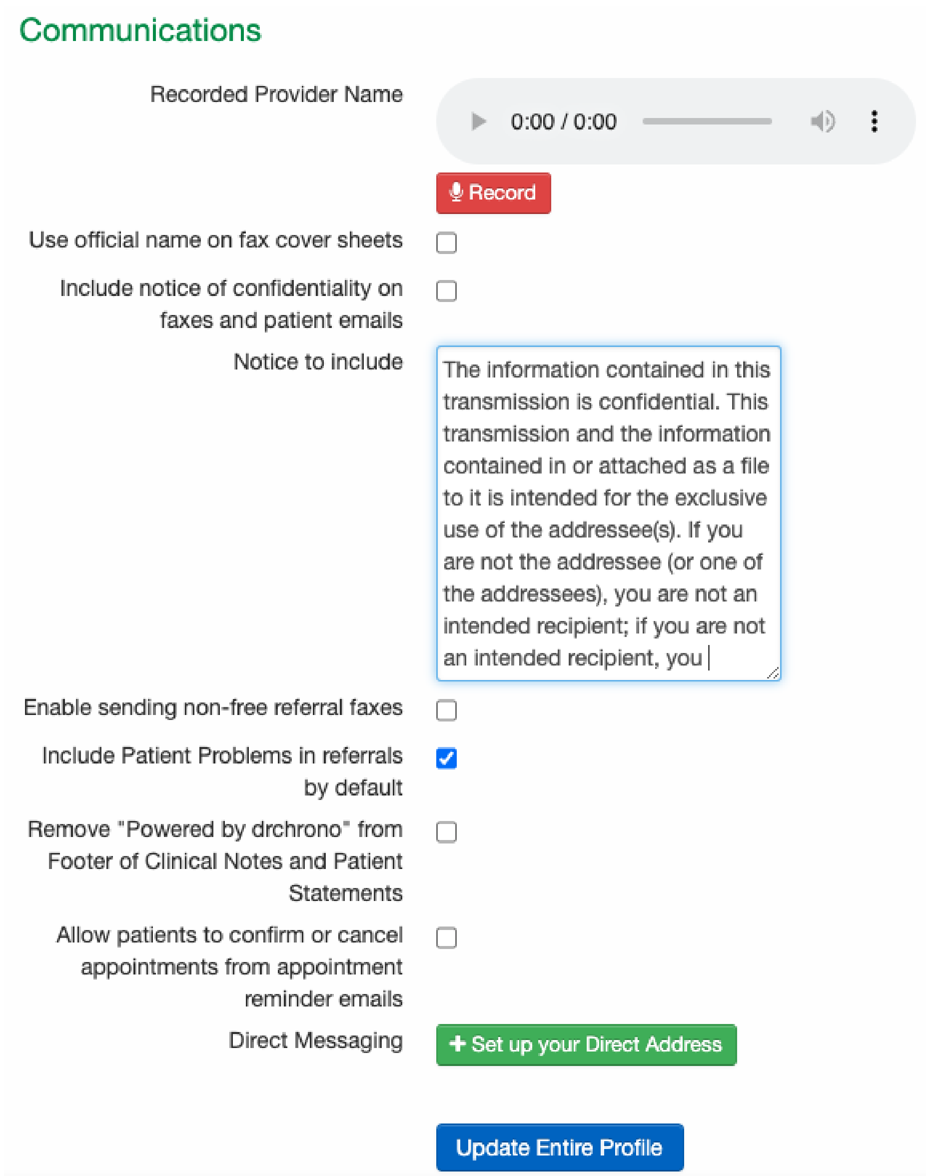
Excluding Diagnosis and Billing codes from Clinical Notes</td></tr>
<tr><td>Allow Chief Complaint to be Persistent</td><td>With this setting enabled, the patient's chief complaint (the reason for visit in the appointment window) will automatically populate the 'chief complaint' field in the clinical note and the 'reason for visit' field in the appointment window. This information is pulled from the most recent visit.</td></tr>
</table>

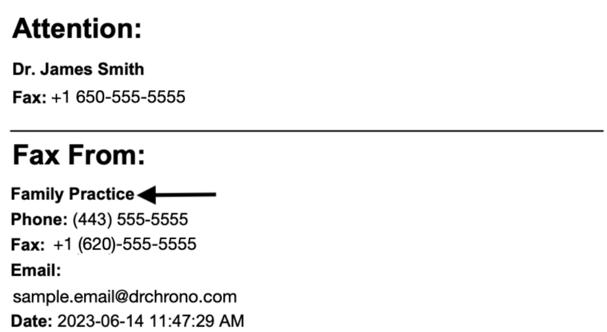
Preview Previous Note	When enabled, a preview of the contents of the previous note will display when you hover over the form in the selection screen. 

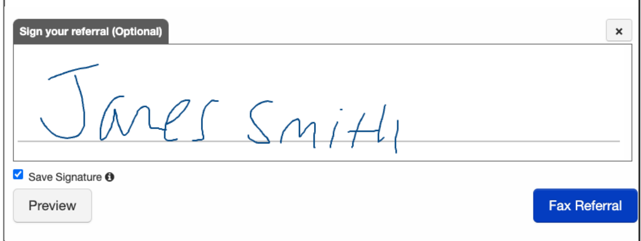
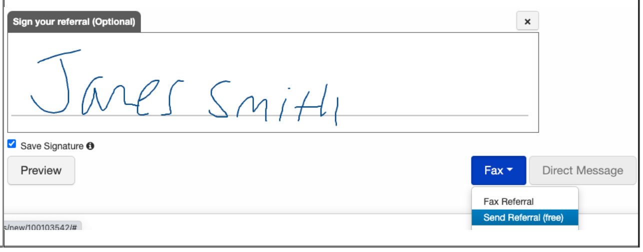
Patient Vitals

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

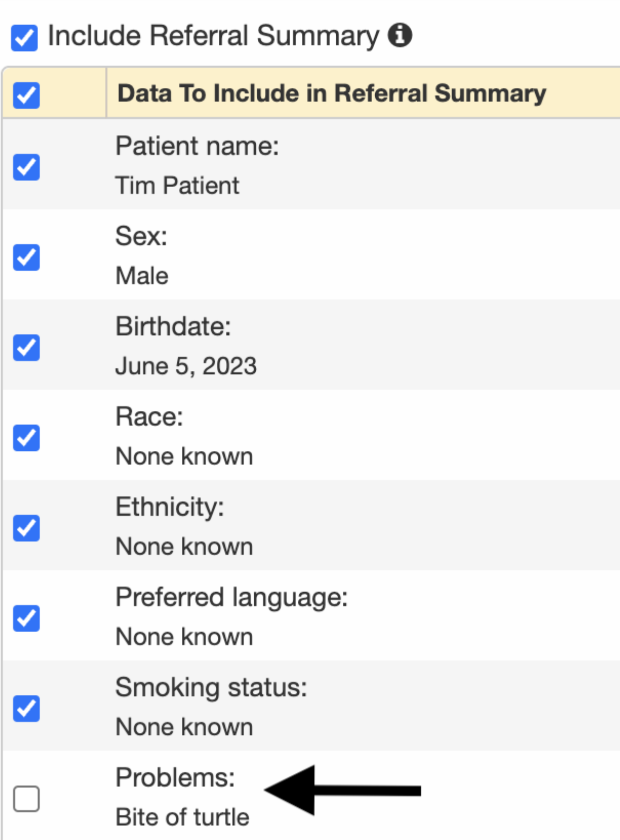
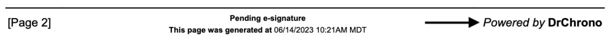
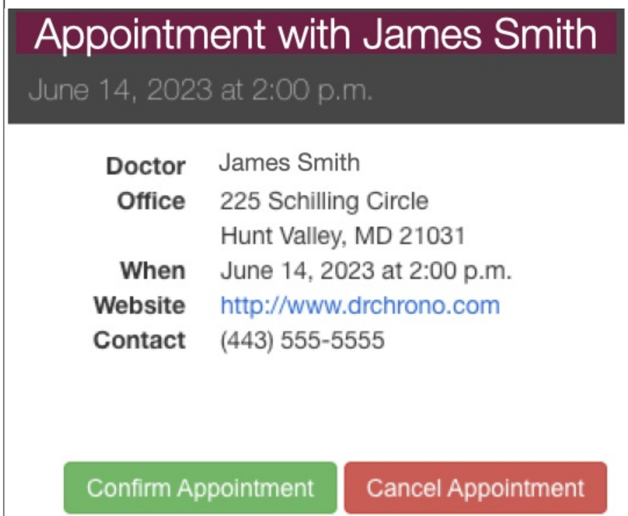
Communications



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 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. 

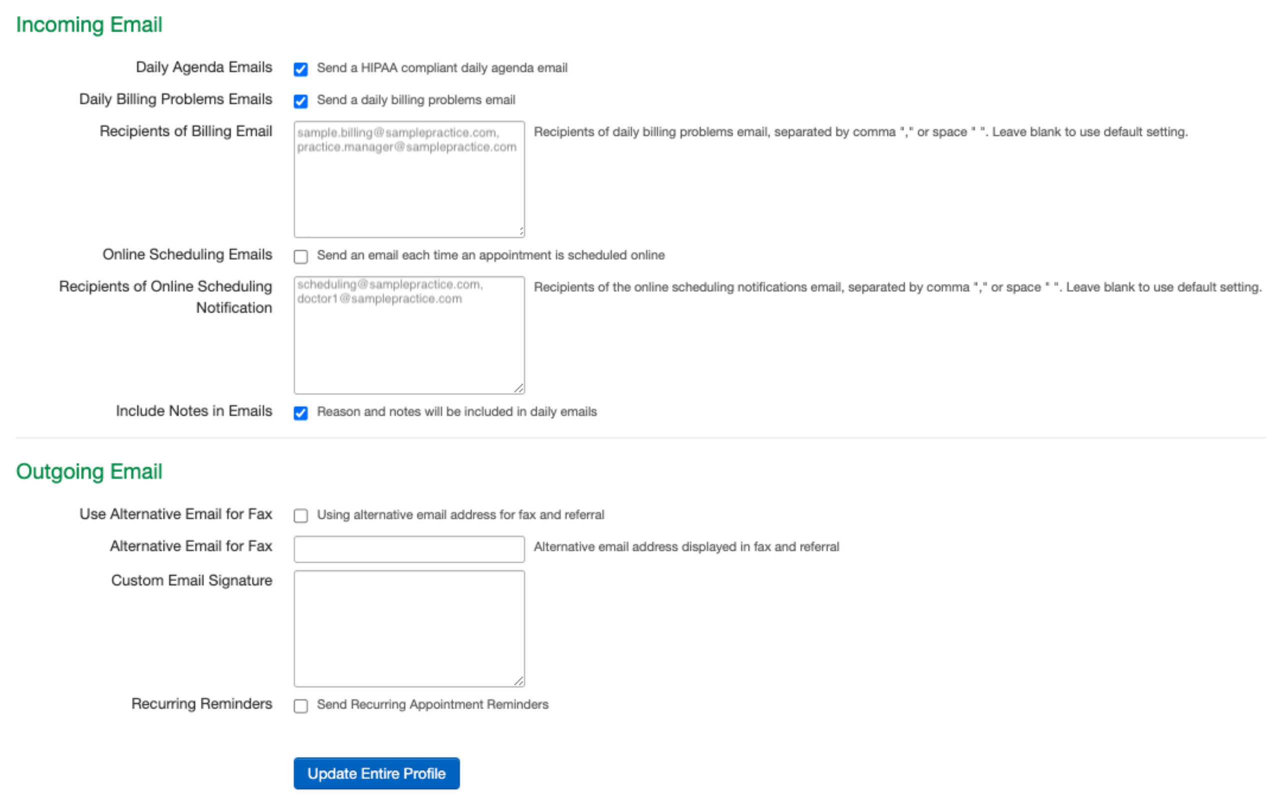
Include Notice of Confidentiality on Faxes and Patient Emails	1. Enter your confidentiality notice in the text box. 2. Enable the setting to display your confidentiality notice on faxes and emails. How do I add a confidentiality notice to the bottom of all outgoing faxes and emails?
Enable Sending Non-free Referral Faxes	With this enabled, only the "fax referral" option will appear when sending a referral.  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)". 

<table>
<tr><td>Include Patient Problems in Referrals by Default</td><td>Allows you to include patient problems in referrals by default.

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

</td></tr>
<tr><td>Remove "Powered by DrChrono" from the Footer of Clinical Notes and Patient Statements</td><td>Enable this setting to remove the Powered by DrChrono from patient statements and clinical notes.

</td></tr>
<tr><td>Allow Patients to Confirm or Cancel Appointments from Appointment Reminder Emails</td><td>With this enabled, patients will be able to click on a link to confirm or cancel their appointment.

</td></tr>
</table>

Direct Messaging	Click on the "+Set Up Your Direct Address" to set up Direct Messaging. Setting Up Direct Messaging

Email

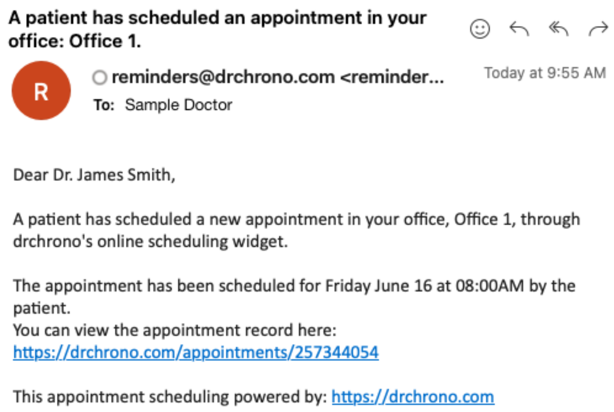


Setting	Description
Daily Agenda Emails	Enable this setting to receive an email that has a schedule of your appointments for the day. Daily Agenda Email
Daily Billing Problems Emails Recipients of Billing Email	With this enabled, you can receive a daily email that details the unresolved billing claims 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

<table>
<tr>
<td>Online Scheduling Email

Recipients of Online Scheduling Notification</td>
<td>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.

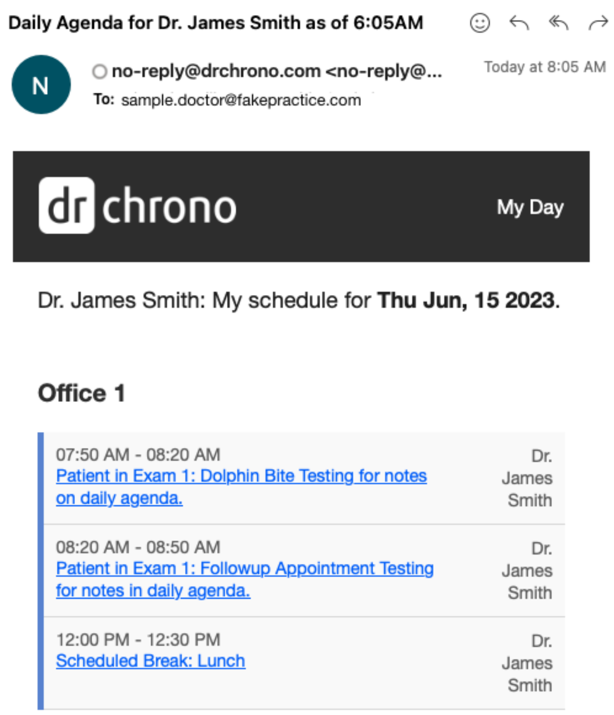

A patient has scheduled an appointment in your office: Office 1.
reminders@drchrono.com <reminder... Today at 9:55 AM
To: Sample Doctor

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</td>
</tr>
<tr>
<td>Include Patient Notes in Emails</td>
<td>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

dr chrono My Day

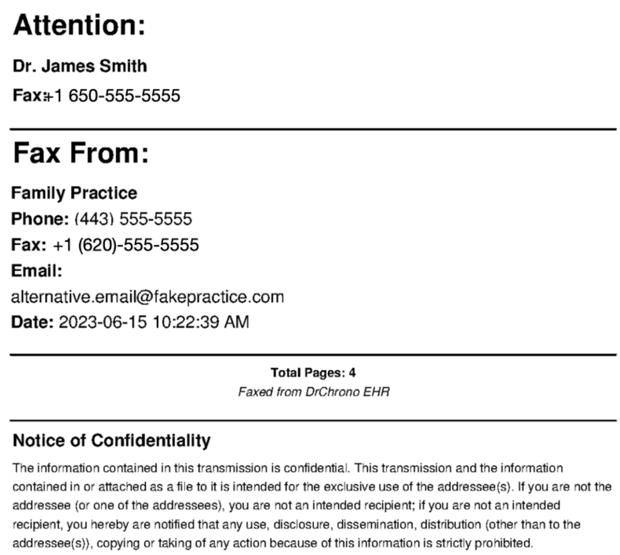
Dr. James Smith: My schedule for Thu Jun, 15 2023.

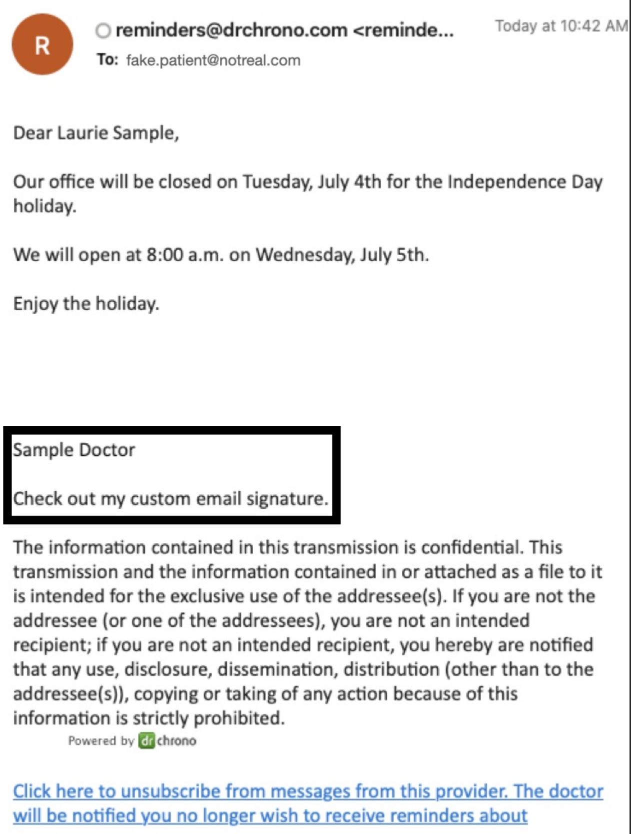
Office 1

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</td>
</tr>
</table>

Use Alternative Email for Fax Alternative Email for Fax	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.  **Attention:** **Dr. James Smith** **Fax:**+1 650-555-5555 **Fax From:** **Family Practice** **Phone:** (443) 555-5555 **Fax:** +1 (620)-555-5555 **Email:** alternative.email@fakepractice.com **Date:** 2023-06-15 10:22:39 AM **Total Pages: 4** *Faxed from DrChrono EHR* **Notice of Confidentiality** 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.

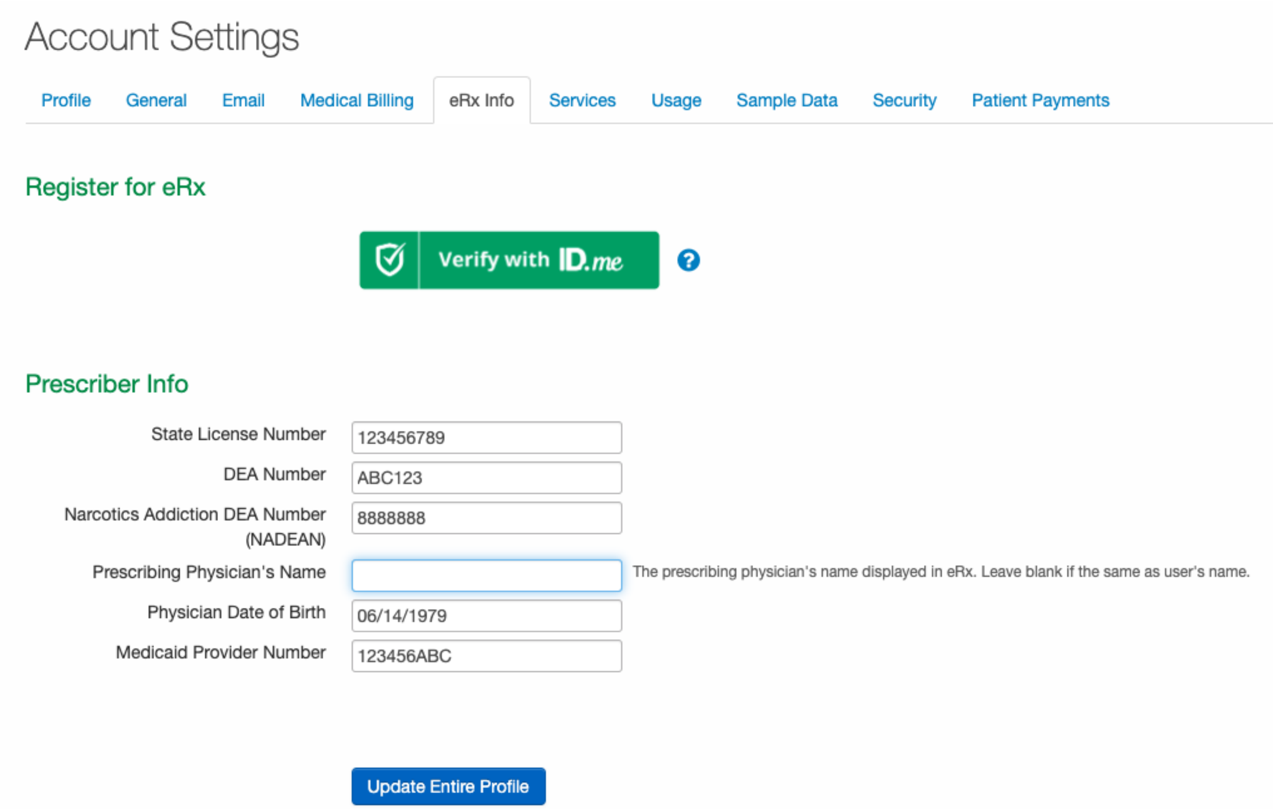
Custom Email Signature	With DrChrono's Send Email feature, you can send email messages to your patients. You can customize the signature that appears on the email.  reminders@drchrono.com <reminde... Today at 10:42 AM To: fake.patient@notreal.com Dear Laurie Sample, Our office will be closed on Tuesday, July 4th for the Independence Day holiday. We will open at 8:00 a.m. on Wednesday, July 5th. Enjoy the holiday. Sample Doctor Check out my custom email signature. 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. Powered by drchrono Click here to unsubscribe from messages from this provider. The doctor will be notified you no longer wish to receive reminders about
Recurring Reminders	Enable this setting to send reminders for recurring appointments.

Medical Billing

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

Medical Billing Account Settings

eRx Info



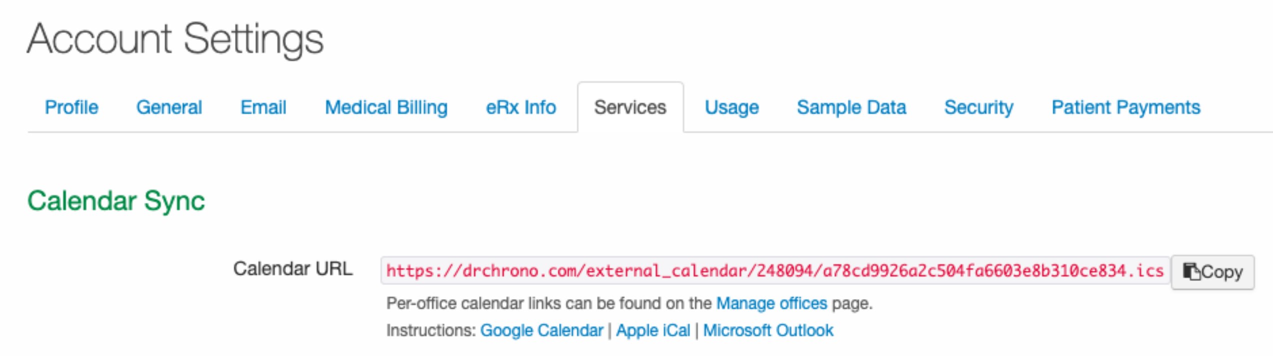
To register for eRx, click on the **Verify with ID.me** button. For more information on the registration process see our articles on eRx and EPCS setup.

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

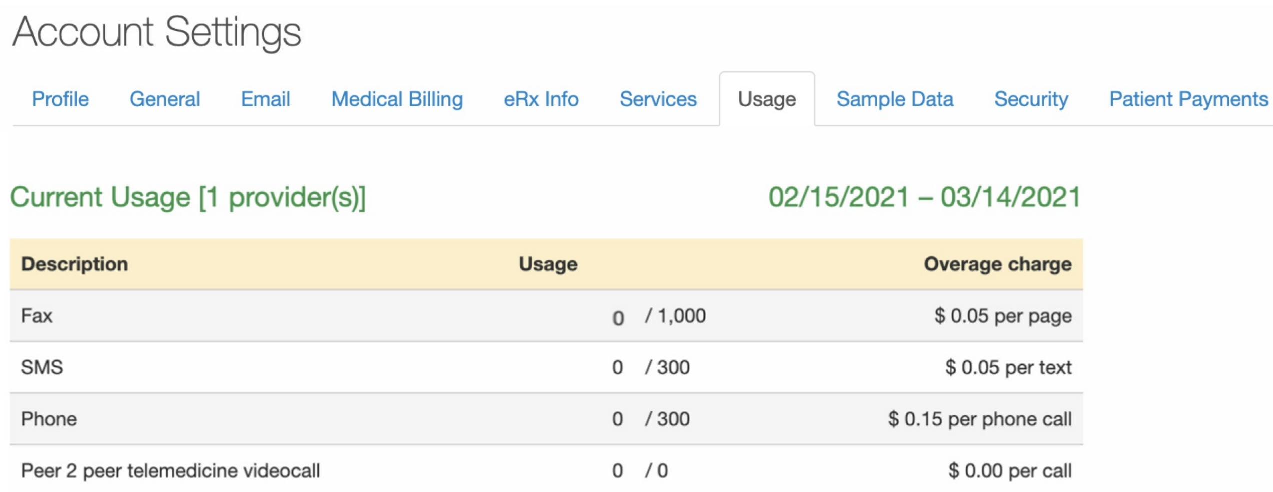
Services



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?

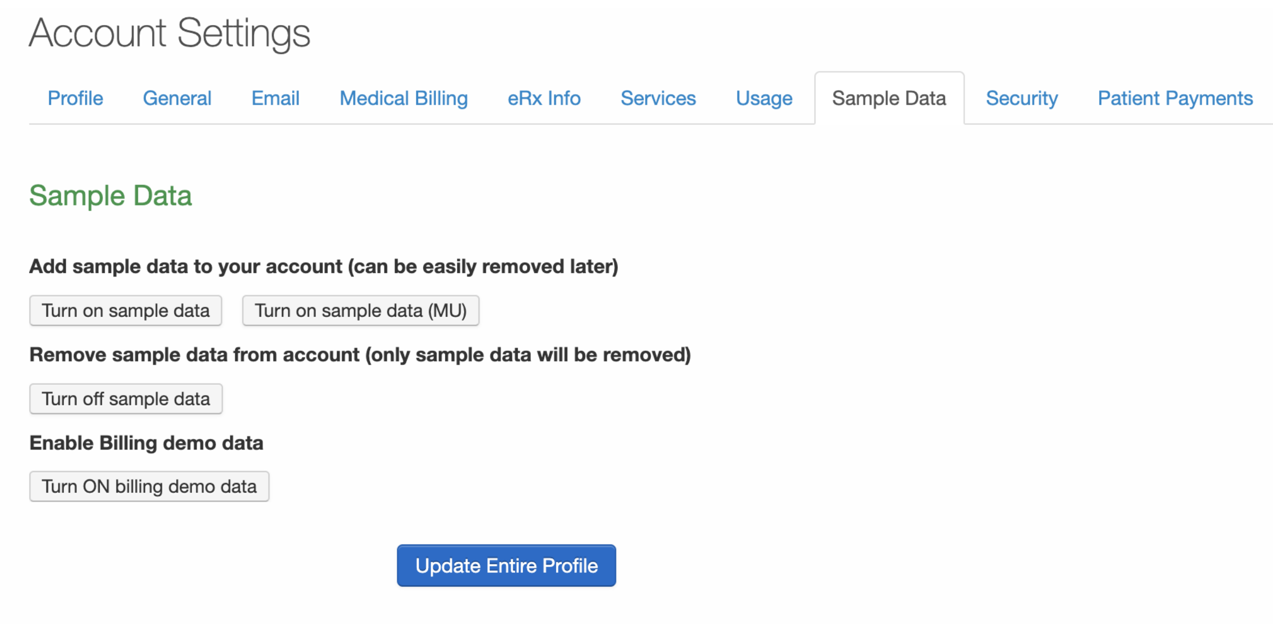
Usage



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?

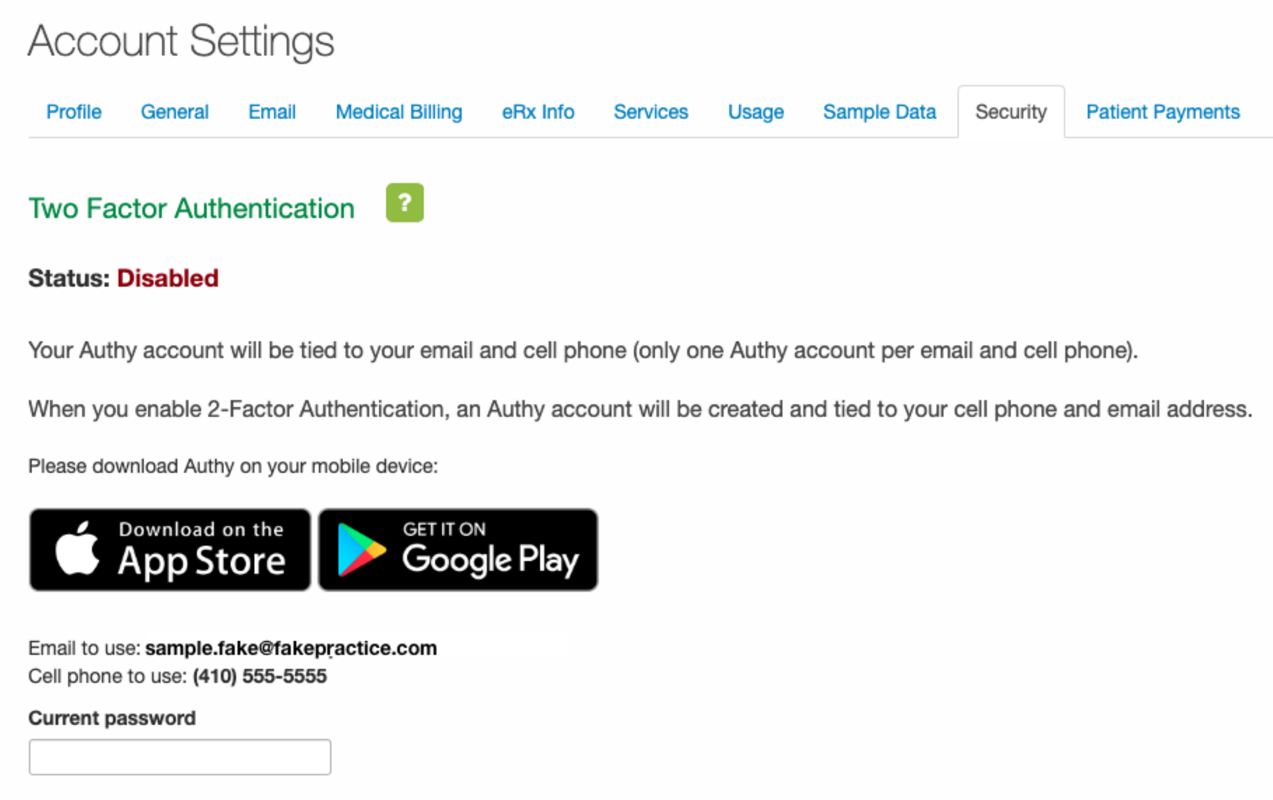
Sample Data



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

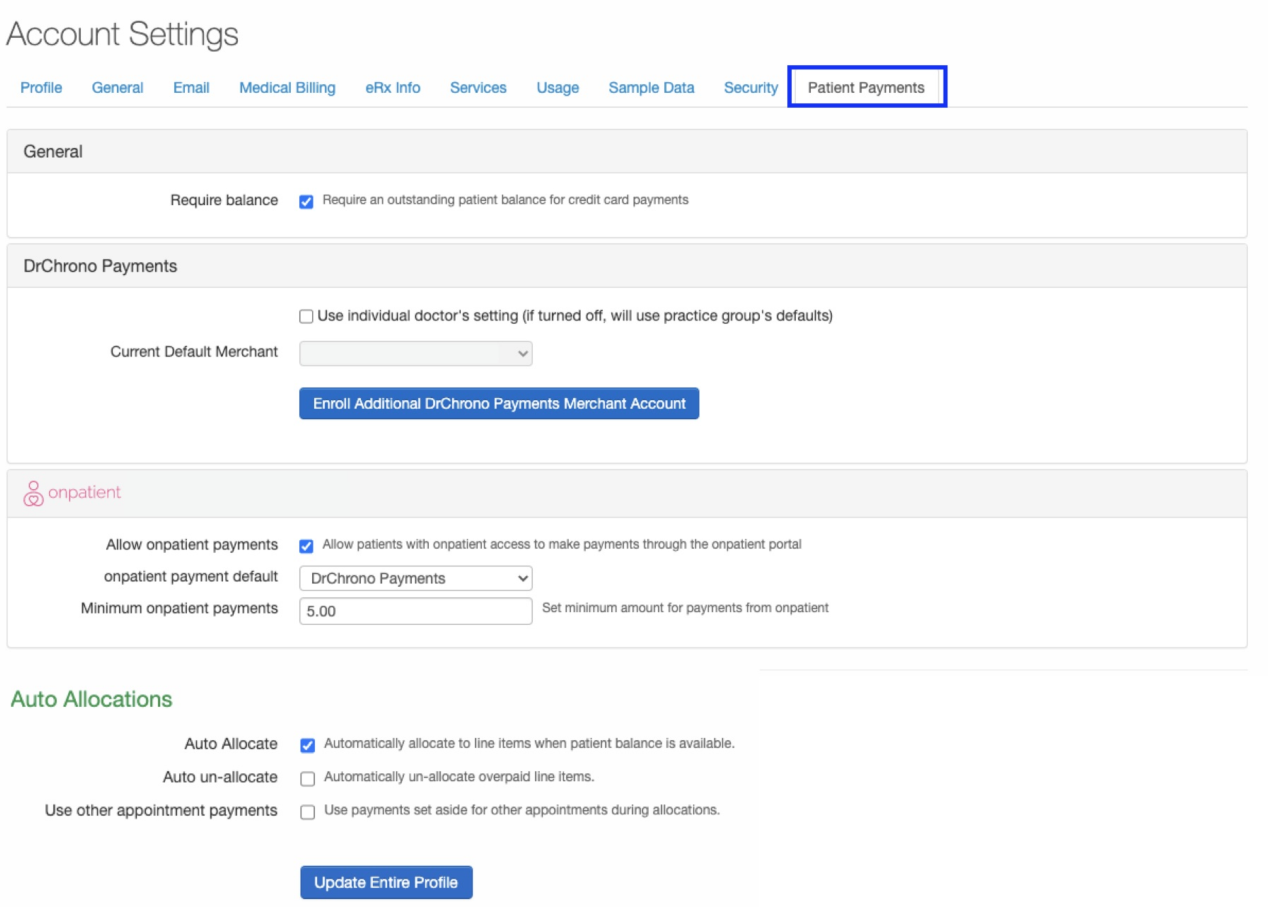


Under the Security tab, you can set up 2-factor authentication for your account. With 2-factor authentication, you can add an additional safeguard to your account.

How do I set up 2-factor authentication in my account?

How does 2-factor authentication work in DrChrono?

Patient Payments



Setting	Description
Require Balance	With this setting enabled, patients will need to have a balance before they can make a payment online.
DrChrono Payments	DrChrono's integrated payment processor allows you to process credit cards for patient payments. DrChrono Payments: How to set up your account
OnPatient • Allow Patient Payments • OnPatient Payment Default • Minimum OnPatient Payments	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. Enabling Patient Payments in OnPatient
Auto Allocations • Auto Allocate • Auto un-allocate • Use other appointment types	The auto-allocate feature allows you to automatically apply payments to line items for a patient. Patient Payments Auto Allocation FAQ