

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.

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 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

Specialty +

Job Title

Timezone

Salutation

Suffix

Website

Home Phone

Office Phone

Cell Phone

Email Address

Password

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

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

Current Plan

Profile Images

Profile Picture No file chosen Will be attached to patient emails

Practice Business Logo 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

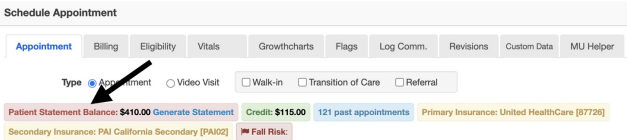
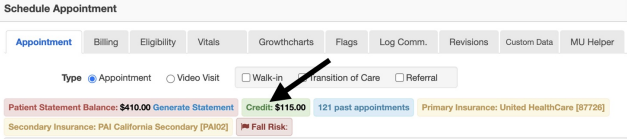
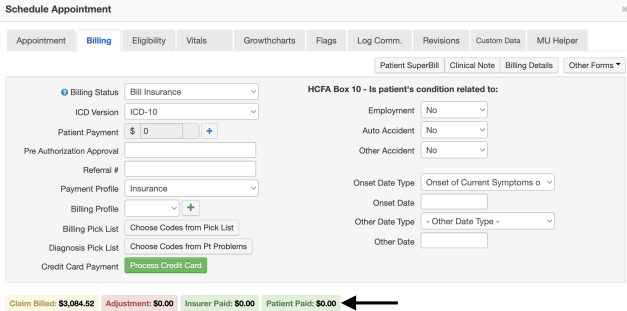
Setting	Description
Display Flag Icon on Appointment Display Lock Icon on Appointment	Displays a lock or flag icon to show when a clinical note is locked or when a patient has flags on the calendar view. What do the lock and flag icons on my appointments mean?
Use New Dashboard Homescreen	When you log 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.

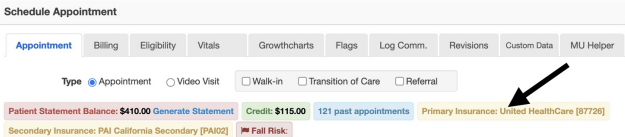
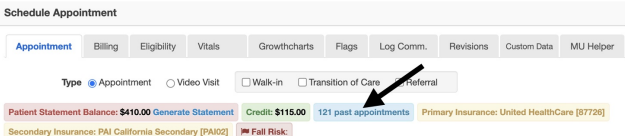
Date range on Appointment Template	<p>Allows you to set a start date and end date for the appointment templates on your calendar.</p> <p>How do I add a date range to my appointment templates?</p>
Appointment Templates in More Views	<p>Allows you to have appointment templates appear in all calendar views with the exception of monthly.</p> <p>Enabling Appointment Templates in All Calendar Views</p>
Allow Exam Room Overlaps	<p>Allows you to schedule appointments in the same exam room at the same time.</p> <p>How do I schedule multiple appointments in the same exam room at one time?</p>
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>
<p>Hide Canceled Appointments</p> <p>Hide Rescheduled Appointments</p>	<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 Allows patients to self-schedule appointments via onpatient
- Patient's Statement Balance Show patient's statement balance.
- Patient's Current Balance Show patient's current balance.
- Claim's Billing Information Show claim's billing information.
- Patient's Insurance Show patient's insurance payer.
- Patient's Flag Show patient flag.
- Appointment Count Show patient's appointments count.
- Matched CDS Rules Show patient's matched CDS rules.
- Auto Appointment Reminders Enable to automatically choose the patient's most recent reminders when scheduling appointments
- Limit patient flags to appointment Show relevant flags related to current appointment.
- Auto-Run Eligibility 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> 
Patient's Current Balance	<p>Allows you to display the patient's current balance as a flag in the appointment window.</p> 
Claim's Billing Information	<p>Displays the billing information for claims in the billing tab of the appointment window.</p> 

Patient's Insurance	<p>Shows flags in the appointment window for the patient's insurance.</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> 
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 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>
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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																																				
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 border="1" data-bbox="815 450 1433 600"> <thead> <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> </thead> <tbody> <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 S9 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 #0</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>4.82 mL</td> </tr> </tbody> </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 S9 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 #0	-	-	-	-	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> 																																				
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

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

Previous note data:

HPI: Laurie T. Sample's physical exam was normal.

General: True

General [-]: no significant weight change, no weakness, no fatigue, no fever

General [+]:

Comments:

Skin: True

Skin [-]: no rash, no lumps, no sores, no itching, no dryness, no color change, no changes in hair or nails

Skin [+]:

Comments:

HEENT: True

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,...

HEENT [+]:

Comments:

Neck: True

Neck [-]: no lumps, no lymphadenopathy, no goiter, no pain, no stiffness

The screenshot shows a patient record interface. At the top, there are navigation links: Billing, Account, Marketplace, and Help. Below this, the date 06/14/2023 is displayed. The main content area is titled 'SOAP' and contains a form with several sections: 'Subjective' (checked), 'Objective' (checked), 'Assessment' (unchecked), and 'Plan' (unchecked). There are also checkboxes for 'Testing for App', 'Discharge Samp', and 'Consultation Not'.

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	<input type="text" value="kg"/>	Can be overwritten for specific patient (and saved)
Vitals Height Unit	<input type="text" value="cm"/>	Can be overwritten for specific patient (and saved)
Vitals Head Circumference Unit	<input type="text" value="cm"/>	Can be overwritten for specific patient (and saved)
Vitals Temperature Unit	<input type="text" value="c"/>	Can be overwritten for specific patient (and saved)

Communications

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 drchrono" 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](#)

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	<p>With this setting enabled the practice name will appear on the fax cover sheet instead of the provider's name.</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: sample.email@drchrono.com Date: 2023-06-14 11:47:29 AM</p>

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.

A screenshot of a web form titled "Sign your referral (Optional)". It features a text input field containing the handwritten signature "James Smith". Below the field is a checked checkbox labeled "Save Signature" and a "Preview" button. To the right of the "Preview" button is a blue button labeled "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)".

A screenshot of a web form titled "Sign your referral (Optional)". It features a text input field containing the handwritten signature "James Smith". Below the field is a checked checkbox labeled "Save Signature" and a "Preview" button. To the right of the "Preview" button is a dropdown menu labeled "Fax" with a downward arrow, and a "Direct Message" button. The "Fax" dropdown is open, showing two options: "Fax Referral" and "Send Referral (free)".

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 ⓘ

Data To Include in Referral Summary

Patient name:
Tim Patient

Sex:
Male

Birthdate:
June 5, 2023

Race:
None known

Ethnicity:
None known

Preferred language:
None known

Smoking status:
None known

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.

[Page 2]

Pending e-signature
This page was generated at 06/14/2023 10:21AM MDT

→ Powered by DrChrono

Allow Patients to Confirm or Cancel Appointments from Appointment Reminder Emails

With this enabled, patients will be able to click on a link to confirm or cancel their appointment.

Appointment with James Smith

June 14, 2023 at 2:00 p.m.

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

Confirm Appointment

Cancel Appointment

Direct Messaging	<p>Click on the "+Set Up Your Direct Address" to set up Direct Messaging.</p> <p>Setting Up Direct Messaging</p>
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Email

Incoming Email

Daily Agenda Emails Send a HIPAA compliant daily agenda email

Daily Billing Problems Emails Send a daily billing problems email

Recipients of Billing Email Recipients of daily billing problems email, separated by comma ",", or space " ". Leave blank to use default setting.

Online Scheduling Emails Send an email each time an appointment is scheduled online

Recipients of Online Scheduling Notification Recipients of the online scheduling notifications email, separated by comma ",", or space " ". Leave blank to use default setting.

Include Notes in Emails Reason and notes will be included in daily emails

Outgoing Email

Use Alternative Email for Fax Using alternative email address for fax and referral

Alternative Email for Fax Alternative email address displayed in fax and referral

Custom Email Signature

Recurring Reminders Send Recurring Appointment Reminders

[Update Entire Profile](#)

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

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@...>
To: sample.doctor@fakepractice.com



Today at 8:05 AM



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

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.

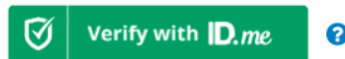
[Medical Billing Account Settings](#)

eRx Info

Account Settings

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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"/>



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 

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?](#)

[How does 2-factor authentication work in DrChrono?](#)

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](#)

onpatient

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

onpatient payment default

Minimum onpatient payments 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	DrChrono's integrated payment processor allows you to process credit cards for patient payments. DrChrono Payments: How to set up your account
OnPatient <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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