

Using the Practice Group Dropdown

07/08/2024 7:43 pm EDT

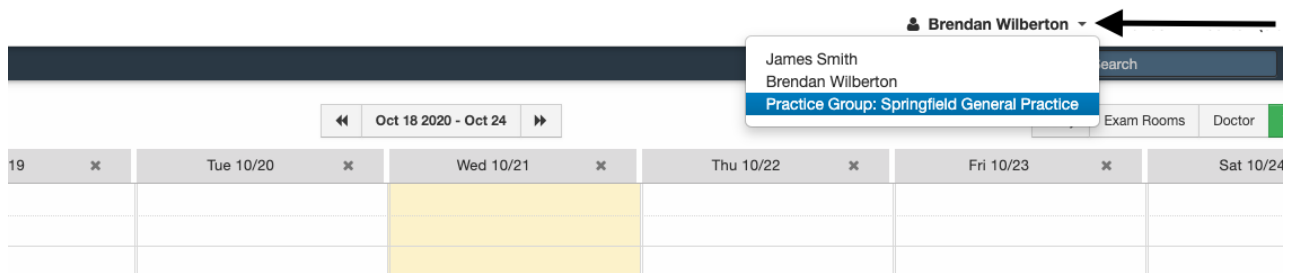
The practice group dropdown allows you to view the collective information of the practice, from all providers, when the **Practice Group** option is selected.

Accessing the Practice Group Dropdown

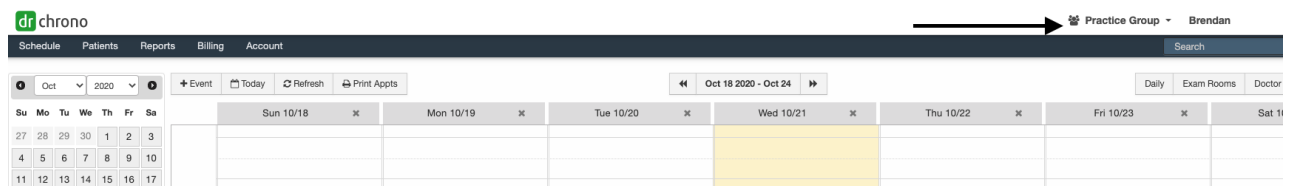
1. To access the practice group, click on the (



) icon next to the provider's name at the top of the screen and select the **Practice Group**.



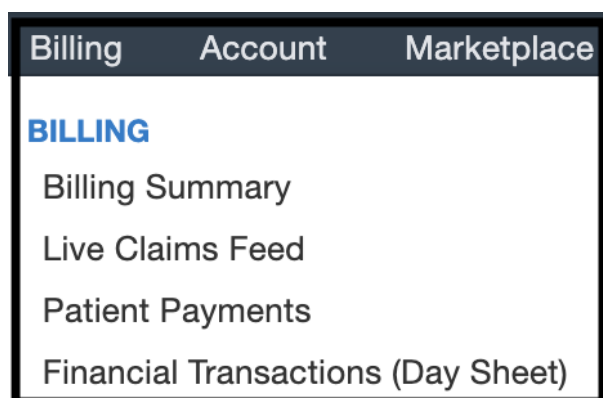
2. Once the **Practice Group** is selected, you will be able to see all of the information for the practice group instead of an individual provider.



Note: While the Practice Group is selected, individual provider settings will not be available.

One of the primary uses of the Practice Group is viewing reports.

Let's look at an example under **Billing > Financial Transaction (Day Sheet)**.



With one provider selected **only** the totals for the selected provider are displayed.

The screenshot shows the DrChrono interface with the 'Day Sheet' tab selected. The 'Practice Group' dropdown is visible in the top right. The 'Grand Totals' section displays the following values:

Category	Amount
DEBIT	\$225.00
CREDIT	\$0.00
ADJUSTMENT	\$0.00
PATIENT PAYMENT	\$20.00

With the Practice Group selected the totals for all providers within the group are displayed.

The screenshot shows the DrChrono interface with the 'Practice Group' dropdown selected. The 'Grand Totals' section displays the following values:

Category	Amount
DEBIT	\$500.00
CREDIT	\$0.00
ADJUSTMENT	\$0.00
PATIENT PAYMENT	\$40.00

Permissions for the Practice Group Dropdown

By default, all roles in DrChrono come with access to the practice group, but it can be found in the permissions menu as **View Practice Group**.

Permissions for James Smith

The screenshot shows a permissions configuration window for 'James Smith'. The 'View Practice Group' permission is highlighted with a yellow border and has a checked checkbox.

Permission	Status
Access to eRx	<input checked="" type="checkbox"/>
Access Billing	<input checked="" type="checkbox"/>
Access Patient Payments	<input checked="" type="checkbox"/>
Access Patient Analytics	<input checked="" type="checkbox"/>
Provider Dropdown	<input checked="" type="checkbox"/>
View Practice Group	<input checked="" type="checkbox"/>
Share Patients	<input checked="" type="checkbox"/>
Access Reports	<input checked="" type="checkbox"/>
Settings	<input checked="" type="checkbox"/>
Export Patients	<input checked="" type="checkbox"/>
Manage Permissions	<input checked="" type="checkbox"/>

Buttons: Close, Save Permissions

If the **View Practice Group** permission is not enabled it will not appear in the menu as seen below.

Permissions Administration

Providers Staff Roles Permissions **Permission Grid**

Provider	Role
James Smith	Custom
Brendan Wilberton	Custom

Another useful, but not required, setting that can be helpful in multi-provider accounts is the **Provider Dropdown**.

Permissions for James Smith

Sign/Lock Clinical Notes	<input checked="" type="checkbox"/>
Drug Interactions Check	<input checked="" type="checkbox"/>
Access to eRx	<input checked="" type="checkbox"/>
Access Billing	<input checked="" type="checkbox"/>
Access Patient Payments	<input checked="" type="checkbox"/>
Access Patient Analytics	<input checked="" type="checkbox"/>
Provider Dropdown	<input checked="" type="checkbox"/>
View Practice Group	<input checked="" type="checkbox"/>
Share Patients	<input checked="" type="checkbox"/>
Access Reports	<input checked="" type="checkbox"/>
Settings	<input checked="" type="checkbox"/>

Close Save Permissions

With this permission enabled, multiple providers will appear in the dropdown menu. If it is not enabled it will only display one provider.

Permissions Administration

Providers Staff Roles Permissions **Permission Grid**

Provider	Role
James Smith	Custom
Brendan Wilberton	Custom