Practice Settings: Office Setup and Management

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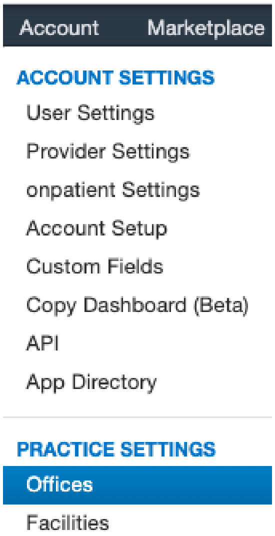
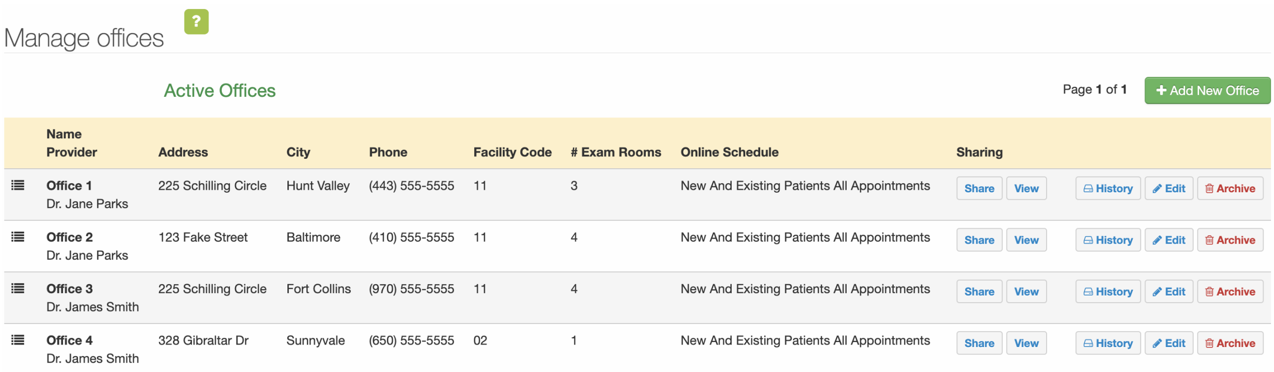
To manage your offices, from your DrChrono navigation bar, mouse over the Account tab > Practice Settings and select Offices.



This will bring you to the 'Manage Offices' page which lets you view and edit your offices. You can create a new office, edit existing offices, and share that office's appointment link with your patients.



	Name Provider	Address	City	Phone	Facility Code	# Exam Rooms	Online Schedule	Sharing	
	Office 1 Dr. Jane Parks	225 Schilling Circle	Hunt Valley	(443) 555-5555	11	3	New And Existing Patients All Appointments	Share View	History Edit Archive
	Office 2 Dr. Jane Parks	123 Fake Street	Baltimore	(410) 555-5555	11	4	New And Existing Patients All Appointments	Share View	History Edit Archive
	Office 3 Dr. James Smith	225 Schilling Circle	Fort Collins	(970) 555-5555	11	4	New And Existing Patients All Appointments	Share View	History Edit Archive
	Office 4 Dr. James Smith	328 Gibraltar Dr	Sunnyvale	(650) 555-5555	02	1	New And Existing Patients All Appointments	Share View	History Edit Archive

Creating a New Office

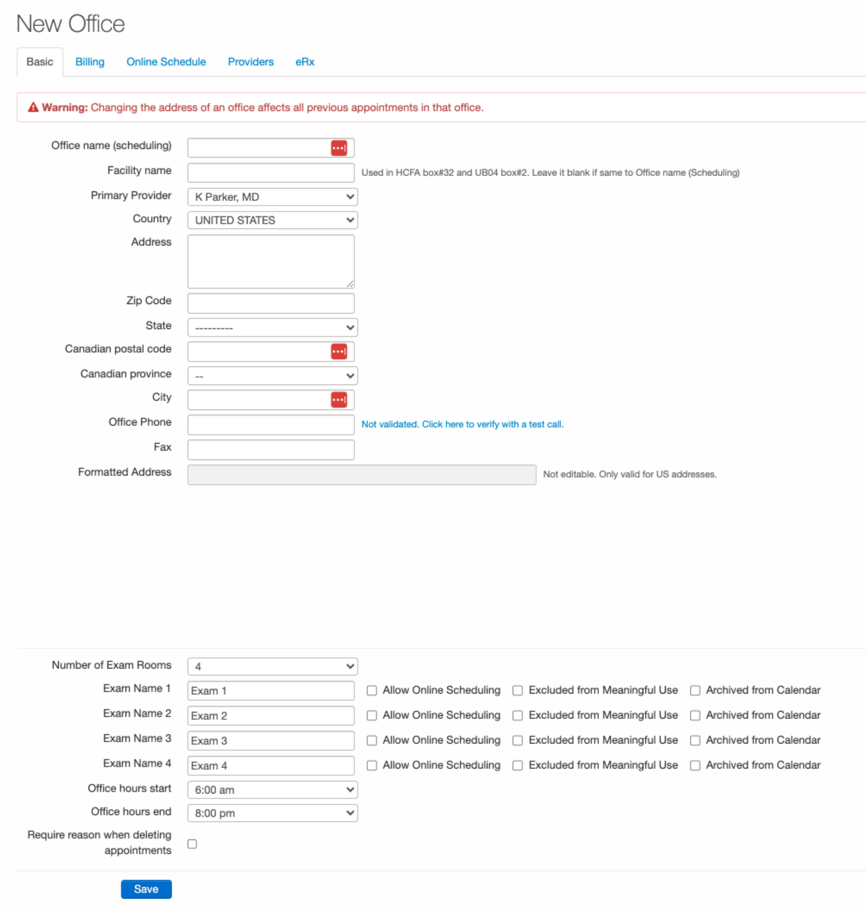
To create a new office, select the +Add New Office button in the upper right-hand corner of the 'Manage Offices' page. To create a new office, there are three tabs (Basic, Billing, and Online Schedule) that you may use to fill out your office information.

1. Basics Tab

The basics tab is the only one that must be filled out to create an office. Here you will find the name, provider, and location fields to identify your office. The phone number you enter here is the number that will appear as the call-back number in the text and email reminders for this office. You may also select the number of exam rooms the office has and assign a name to each room. These rooms are important for scheduling purposes while creating an appointment.

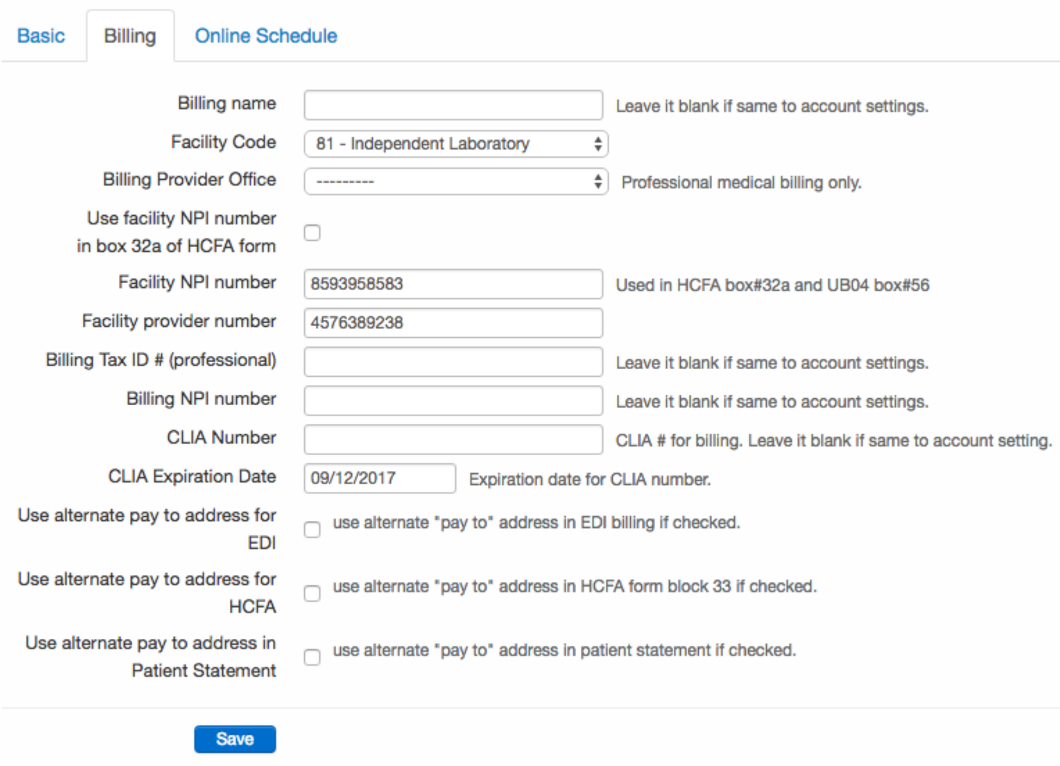
The appointment scheduling process defaults to the provider selected in the top-right dropdown, regardless of the primary provider set in the office settings. For instance, if Dr. Smith is selected in the dropdown, that's the provider shown during the scheduling process, even if Dr. Johnson is listed as the primary provider in the office setting.

An example of when the primary provider is used would be for online scheduling. When an appointment is booked through the scheduling widget, the system will default to the provider assigned to that office. For instance, if the office is configured for Dr. Johnson, they will be the default provider when patients schedule through the widget.



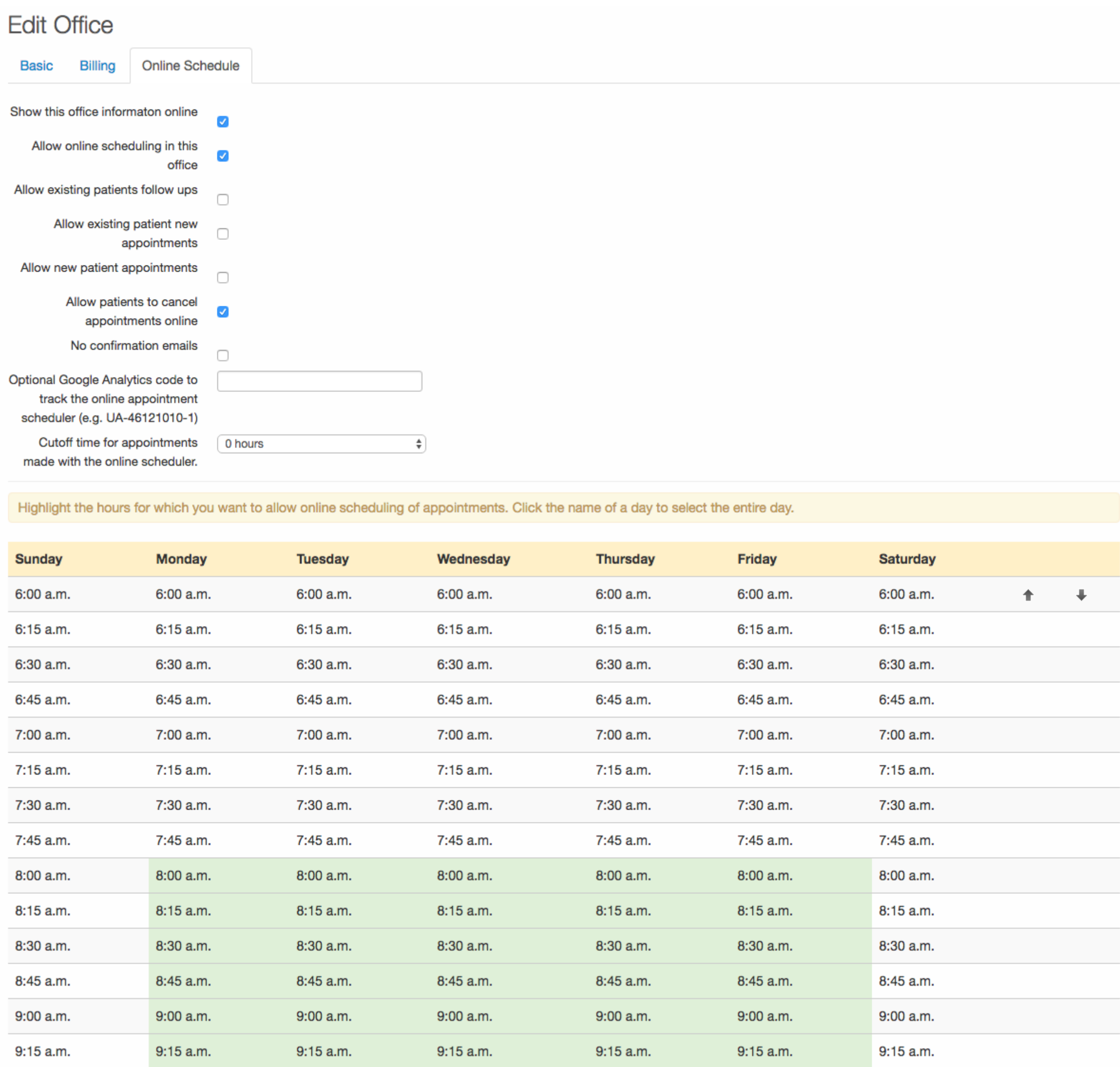
2. Billing Tab

The billing tab allows you to fill out essential billing information associated with your office. Here you will find fields for the billing name, facility code, provider office, office NPI number, office provider number, tax ID, billing NPI number, CLIA number, and CLIA expiration fields.



3. Online Scheduling Tab

The online scheduling tab allows you to select what hours are available for your patients to schedule online. You can enable or disable online scheduling with the **Show this office information online** and **Allow Online Scheduling** checkboxes. Upon checking the 'Allow Online Scheduling' check box, a time selection box will appear for you to select all periods to allow online scheduling.



Confirmation emails will be sent to the patient, who schedules using the scheduling widget, automatically to confirm their appointment. You can disable this process by checking the **No confirmation emails** box.

4. Providers and eRx Tabs
The providers and eRx tabs do not limit a provider's access to a single office. It is used for MIPS reporting on prescribing measures and is required by Surescripts. The Surescripts Prescriber ID (SPI) is assigned based on specific details and must be configured for each office.
Learn more about Adding Prescriber Information to an Office.

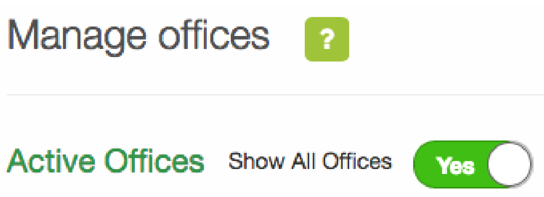
Organizing Your Offices

1. Reordering your offices

To reorder your offices, click and hold down on the icon shown below.

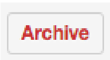
After clicking and holding down on the icon, drag and drop the office to the desired position.

If you have more than 25 offices, your offices will be displayed on two pages. To reorder offices to another page, select the **Show All Offices** switch on top of your office list. This switch will only appear if you have more than 25 offices.



2. Archiving/Unarchiving Your Offices

To archive an unused office, select the **Archive** button next to the corresponding office. Once an office is archived, all appointments associated with the office will also be archived.



Your archived offices will appear in a section titled 'Archived Offices' below. To unarchive an office, select the **Unarchive** button. Once an office is unarchived, the appointments associated with that office will also become unarchived.


Archived Offices

Name Provider	Address	City	Phone	Facility Code	# Exam Rooms	
Test Office	1 Main Street	Cupertino		11	4	Unarchive