

Office Setup and Management

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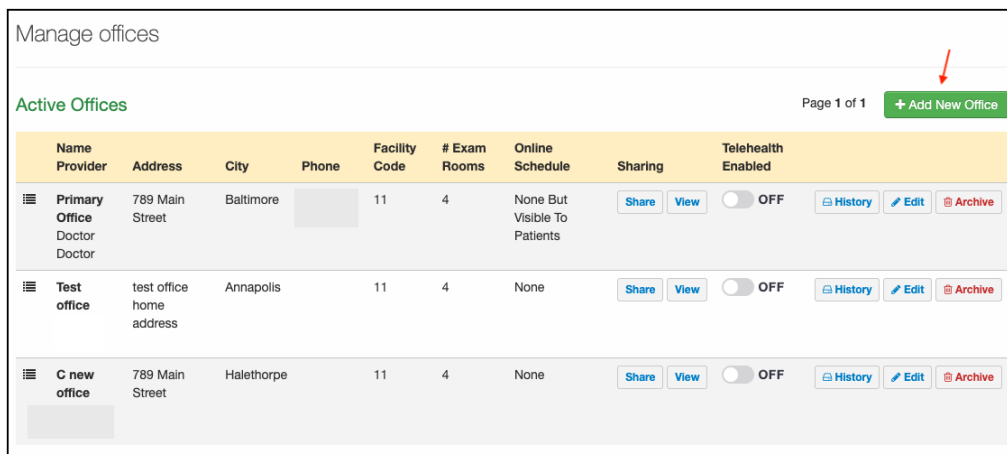
Creating single or multiple offices within your DrChrono account will keep your appointments organized and the billing information for each office correct on claims.

Creating an Office | Reordering Offices | Archiving & Unarchiving Offices

Creating an Office

To create an office:

1. Hover over the **Account** and Select **Offices**.
2. Press **+ Add New Office** on the right side of the screen.



Manage offices

Active Offices Page 1 of 1 [+ Add New Office](#)

	Name Provider	Address	City	Phone	Facility Code	# Exam Rooms	Online Schedule	Sharing	Telehealth Enabled	
☰	Primary Office Doctor Doctor	789 Main Street	Baltimore		11	4	None But Visible To Patients	Share View	<input type="checkbox"/> OFF	History Edit Archive
☰	Test office	test office home address	Annapolis		11	4	None	Share View	<input type="checkbox"/> OFF	History Edit Archive
☰	C new office	789 Main Street	Halethorpe		11	4	None	Share View	<input type="checkbox"/> OFF	History Edit Archive

3. The **Basic** tab will allow you to enter the demographic information for the office location. Please note:
 - a. The information listed under **FacilityName** will appear in HCFA Box #32 and on the UB04 in Box #2. The information entered under **Office name (scheduling)** will appear if the field is blank.
 - b. The phone number listed under Office Phone will appear as the call-back number in the text and email reminders to your patients with appointments in this office.
 - c. The number of exam rooms for each office are also entered on this screen. The rooms are named, start and end hours listed, and are important for scheduling purposes. You can also allow online scheduling, exclude the exam room from Meaningful Use, or archive it from your calendar.
 - d. The number of exam rooms for each office are also entered on this screen. The rooms are named, start and end hours listed, and are important for scheduling purposes. You can also allow online scheduling, exclude the exam room from Meaningful Use, or archive it from your calendar.
 - e. The primary provider listed on the Basic tab would be the provider listed on the appointment when booked through the scheduling widget.

New Office

Basic

Billing

Online Schedule

Providers

eRx

Warning:

Changing the address of an office affects all previous appointments in that office.

Office name (scheduling)

Facility name

Primary Provider

Country

Address

Zip Code

State

Canadian postal code

Canadian province

City

Office Phone

Fax

Formatted Address

Used in HCFA box#32 and UB04 box#2. Leave it blank if same to Office name (Scheduling)

Not validated. [Click here to verify with a test call.](#)

Not editable. Only valid for US addresses.

Number of Exam Rooms

Exam Name 1

Office hours start

Office hours end

Require reason when deleting appointments

Allow Online Scheduling

Excluded from Meaningful Use

Archived from Calendar

Save

4. The **Billing** tab allows you to enter billing-specific information for the office such as Place of Service, NPI, TIN, CLIA Number, Expiration Date (if applicable), and an alternative pay-to-address.
 - a. Please note, that the options for Institutional Medical Billing will only show if your account is set to bill institutional claims.
 - b. If you provide services outside of your medical office and away from where you would receive your reimbursements, ensure the **Billing Provider Office** section is completed. This will control what information (office/address) appears in box #33 of the HCFA-1500 form, and which address payments or correspondence could be sent.
 - c. The hierarchy of populating TIN/NPI information on claims is:
 - i. Account Settings (above)
 - ii. [Insurance Set-Up](#)
 - i. If there is an entry for specific insurances under Insurance Set Up, that entry will override the information listed under account settings for that payer.

New Office

Basic Billing Online Schedule Providers eRx

Billing name Leave it blank if same to account settings.

Facility Code

Billing Provider Office Professional medical billing only.

Use facility NPI number in box 32a of HCFA form ☐

Facility NPI number Used in HCFA box#32a and UB04 box#56

Facility provider number

Billing Tax ID # (professional) Leave it blank if same to account settings.

Billing NPI number Leave it blank if same to account settings.

CLIA Number CLIA # for billing. Leave it blank if same to account setting.

CLIA Expiration Date Expiration date for CLIA number.

Use alternate pay to address for EDI ☐ use alternate "pay to" address in EDI billing if checked.

Use alternate pay to address for HCFA ☐ use alternate "pay to" address in HCFA form block 33 if checked.

Use alternate pay to address in Patient Statement ☐ use alternate "pay to" address in patient statement if checked.

Institutional Medical Billing

Use alternate pay to address in Hospital Claim ☐ use alternate "pay to" address in 837i billing and UB-04 form if checked.

Facility Tax ID # (institutional) Leave it blank if same to account settings.

Facility Type default value for UB04 box 4

Care Type default value for UB04 box 4

Billing Sequence default value for UB04 box 4

Admission Type default value for UB04 box 14

Origin Point default value for UB04 box 15

Discharge Status default value for UB04 box 17

Save

5. The **Online Schedule** tab allows you to select what hours are available for your patients to schedule appointments online. You can enable or disable online scheduling with the **Show this office information online** and **Allow Online Scheduling** checkboxes. After checking **Allow online scheduling in this office** box is selected, a time selection box will appear for you to select the hours to allow for online scheduling. Confirmation emails will be sent to the patient who schedules an appointment using the scheduling widget. You can disable the emails by selecting **No confirmation emails** box.

New Office

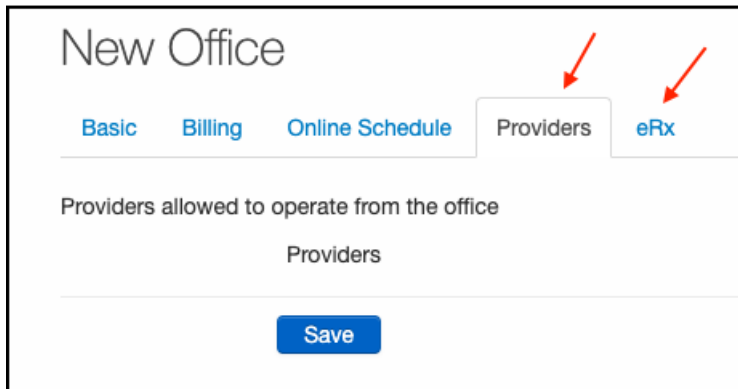
Basic Billing Online Schedule Providers eRx

Show this office information online ☐

Allow online scheduling in this office ☐

Save

6. 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](#).

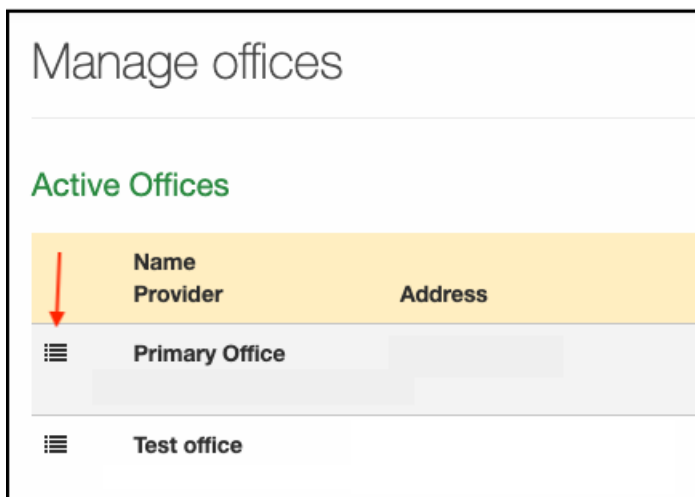


The screenshot shows a 'New Office' form with five tabs: 'Basic', 'Billing', 'Online Schedule', 'Providers', and 'eRx'. Red arrows point to the 'Providers' and 'eRx' tabs. Below the tabs, the text 'Providers allowed to operate from the office' is followed by a label 'Providers' and a 'Save' button.

Organizing Your Offices

Reordering offices

1. Press and hold the hamburger icon on the left of the screen.



The screenshot shows the 'Manage offices' screen. Under the heading 'Active Offices', there is a table with columns 'Name', 'Provider', and 'Address'. A red arrow points to the hamburger icon on the left of the first row, 'Primary Office'. Below it is another row labeled 'Test office'.

	Name	Provider	Address
☰	Primary Office		
☰	Test office		

2. Drag and drop the entry in the desired position.
3. If you have more than 25 offices, they will be displayed on two pages. To reorder, select **Show All Offices** at the top of your office list. This will allow you to see all offices so you can drag/drop them in the order you select. The switch will only be visible if you have more than 25 offices.

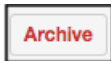
Manage offices ?

Active Offices Show All Offices Yes

Archiving / Unarchiving Offices

To archive an unused office:

1. Select the **Archive** button next to the corresponding office.



2. Once an office is archived, all appointments associated with the office will also be archived.
3. Your archived offices will appear under **Archived Offices**.
4. To unarchive an office, select the **Unarchive** button.
5. Once an office is unarchived, the appointments associated with that office will also become unarchived.

Archived Offices					
Name	Address	City	Phone	Facility Code	# Exam Rooms
Provider					
Test Office				11	4
					Unarchive