Office Setup and Management

Last modified on 11/05/2026 12:45 pm EST

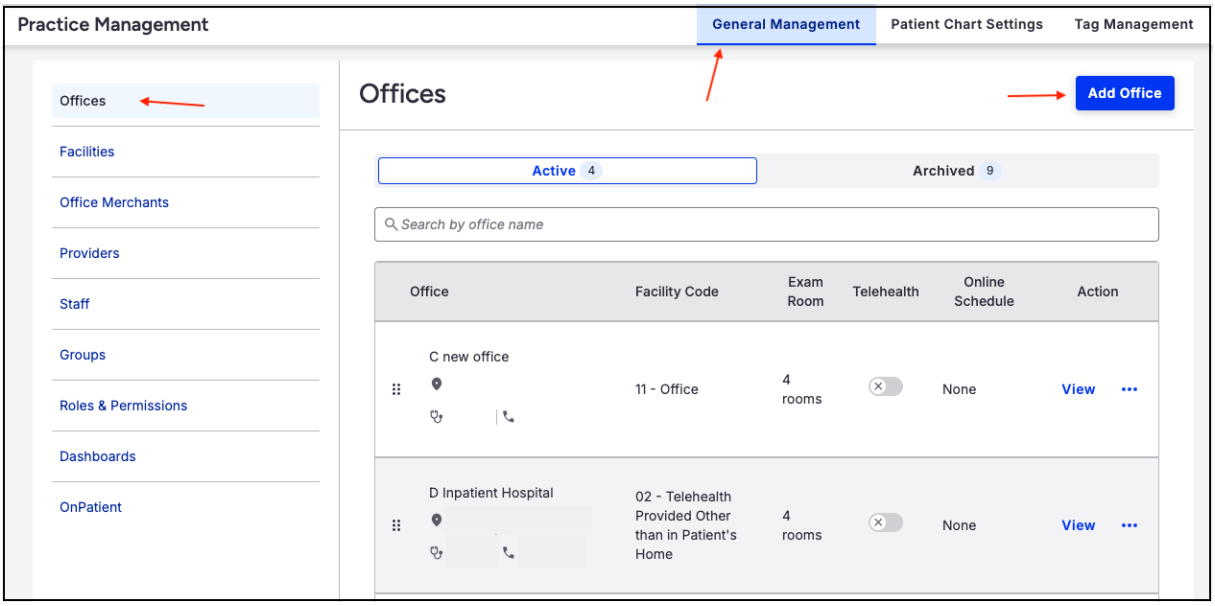
Creating single or multiple offices within your DrChrono account will keep your appointments organized and the billing information for each office correct on claims.

Creating an Office | Reordering Offices | Archiving & Unarchiving Offices

Creating an Office

To create an office:

1. Hover over the **Account** and Select Practice Management.
2. Under the General Management tab > Offices Section, press **+ Add Office** on the right side of the screen.

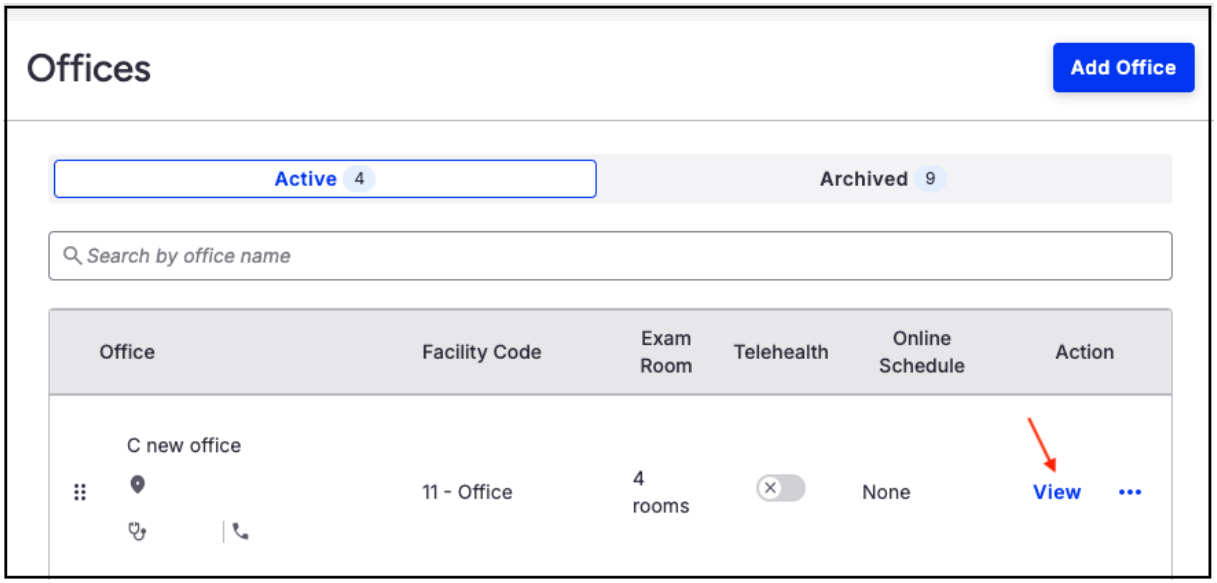


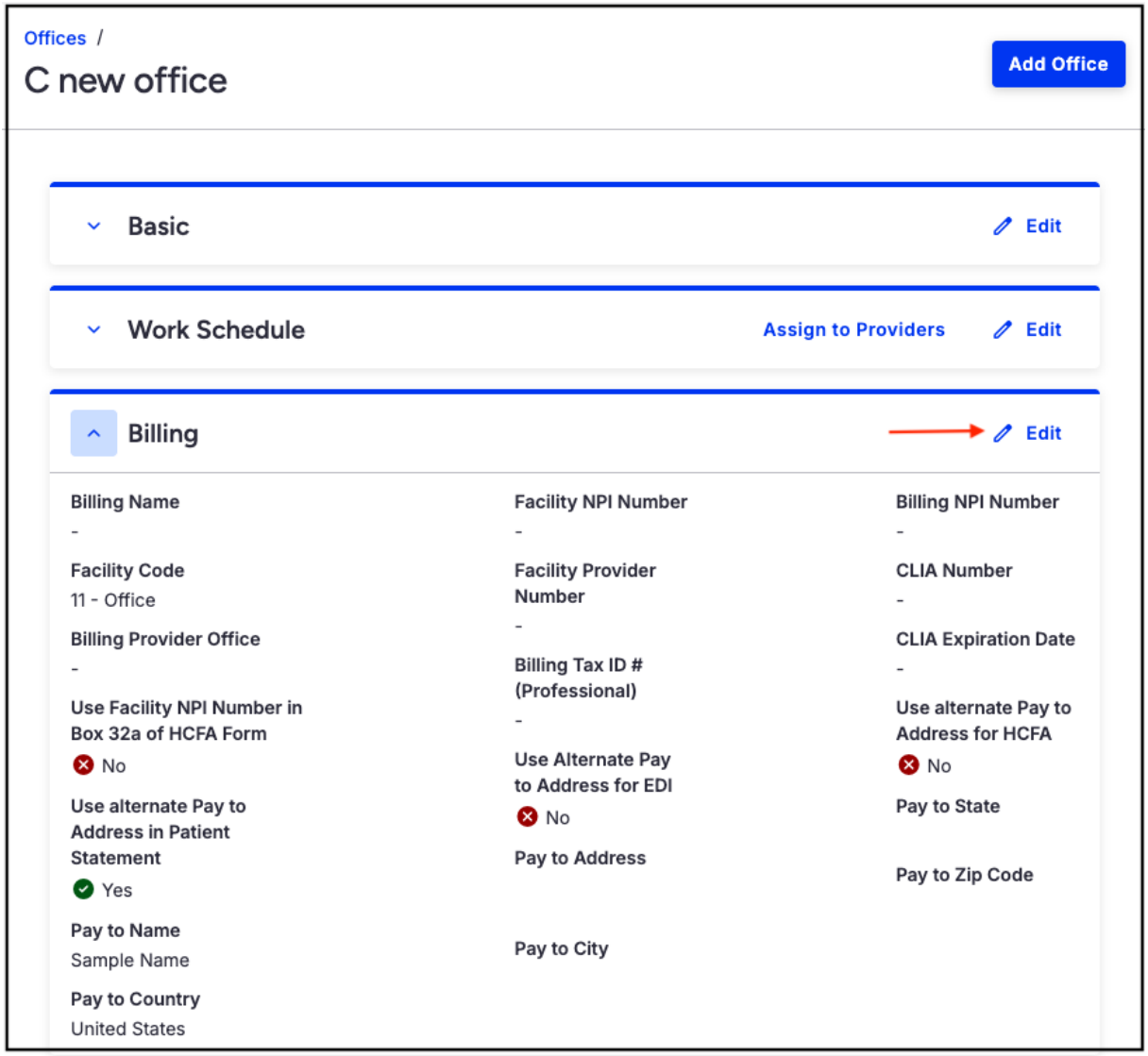
3. The **Basic** tab will allow you to enter the demographic information for the office location. Please note:
    a. The information listed under **FacilityName** will appear in HCFA Box #32 and on the UB04 in Box #2. The information entered under **Office name (scheduling)** will appear if the field 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 is also entered on this screen. The rooms are named, start and end hours are listed, and they 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 is also entered on this screen. The rooms are named, start and end hours are listed, and they are important for scheduling purposes. You can also allow online scheduling, exclude the exam room from Meaningful Use, or archive it from your calendar.

The primary provider listed would be the provider listed on the appointment when booked through the scheduling widget.

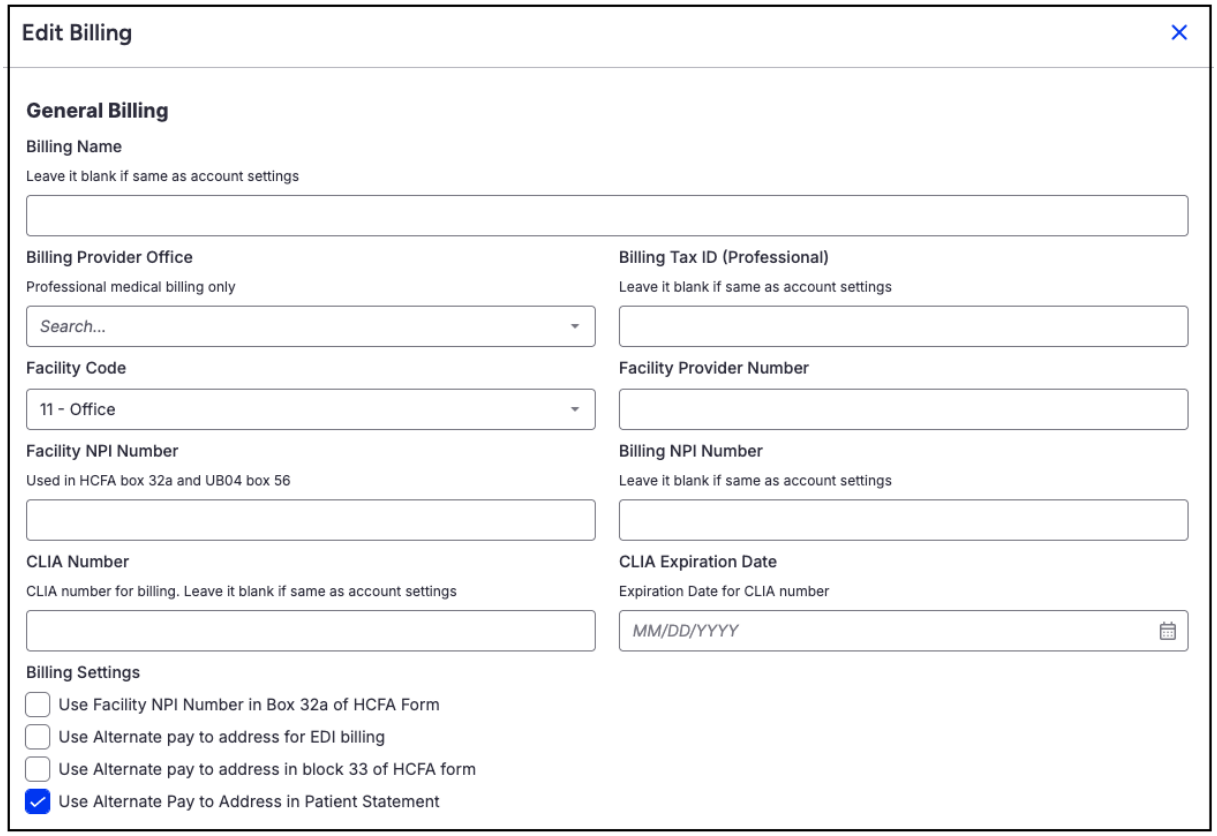
To add specific Billing information

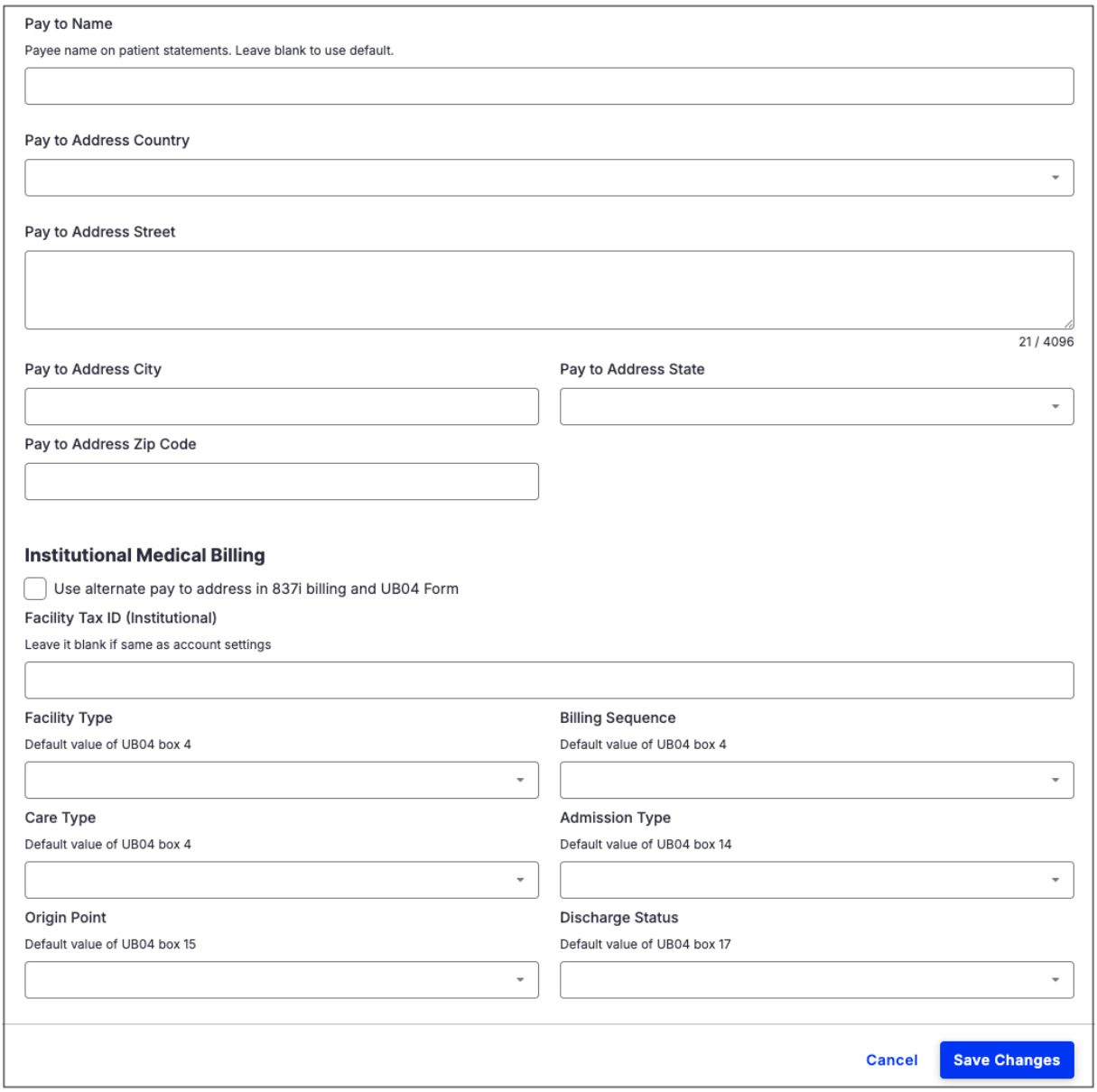
1. Navigate to **View** > **Billing** section





2. Pressing Edit will open a screen to enter office-specific billing information. Once entered, press **Save Changes**.

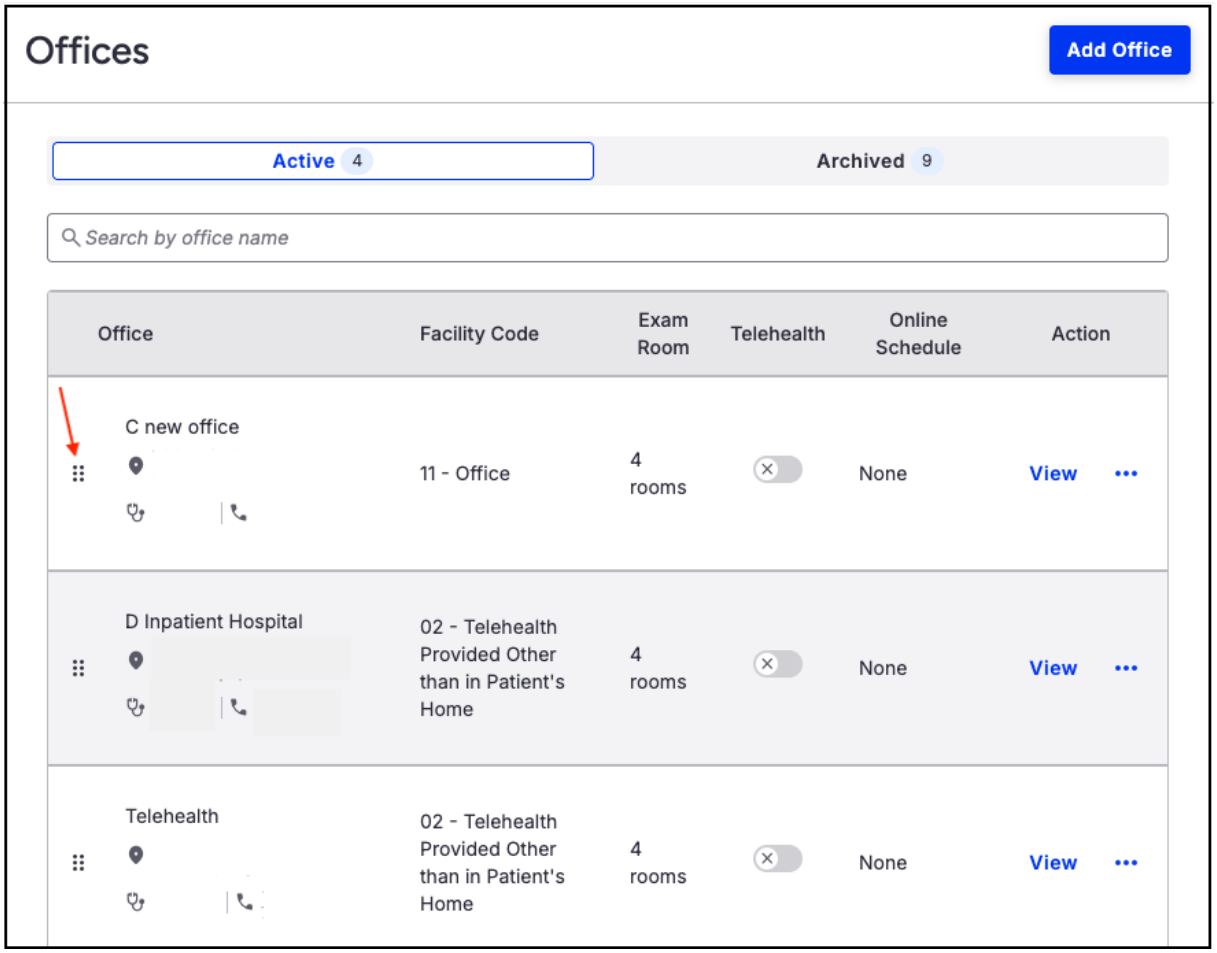

Edit Billing
General Billing
Billing Name
Leave it blank if same as account settings
Billing Provider Office
Professional medical billing only
Search...
Billing Tax ID (Professional)
Leave it blank if same as account settings
Facility Code
11 - Office
Facility Provider Number
Facility NPI Number
Used in HCFA box 32a and UB04 box 56
Billing NPI Number
Leave it blank if same as account settings
CLIA Number
CLIA number for billing. Leave it blank if same as account settings
CLIA Expiration Date
Expiration Date for CLIA number
MM/DD/YYYY
Billing Settings
Use Facility NPI Number in Box 32a of HCFA Form
Use Alternate pay to address for EDI billing
Use Alternate pay to address in block 33 of HCFA form
Use Alternate Pay to Address in Patient Statement



Organizing Your Offices

Reordering offices

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

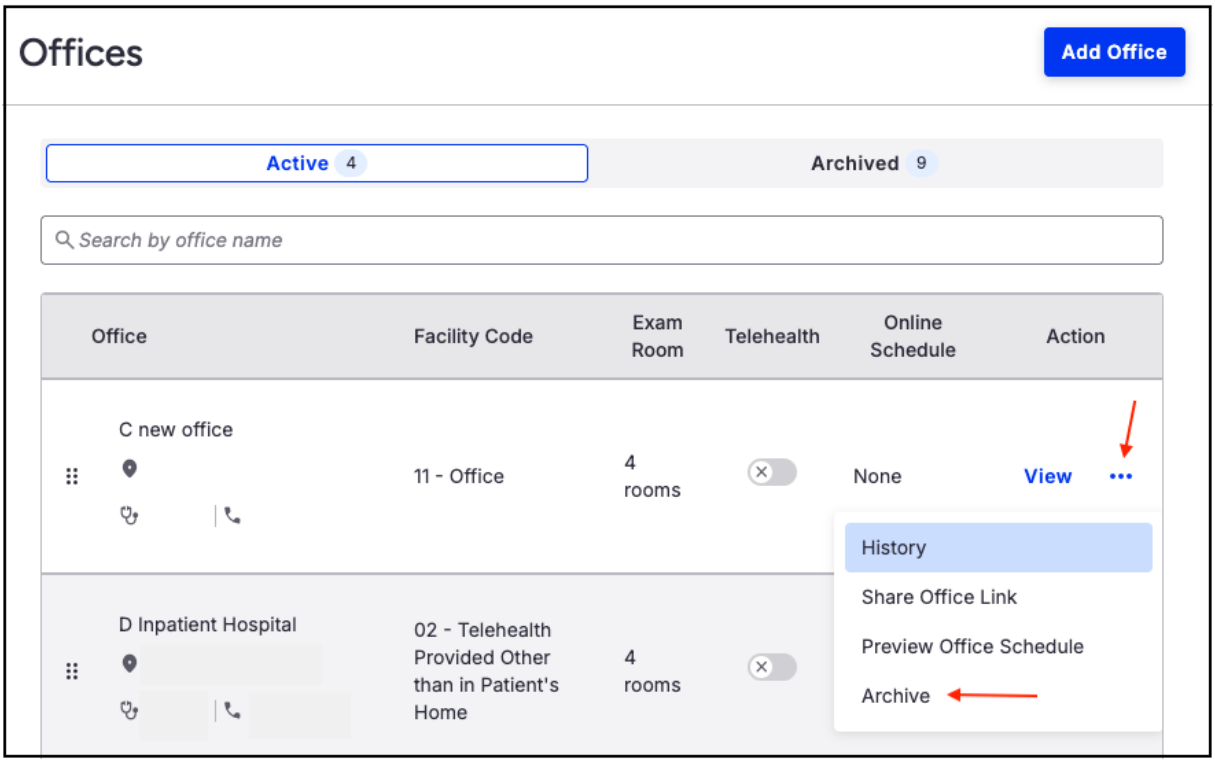


2. Drag and drop the entry in the desired position.

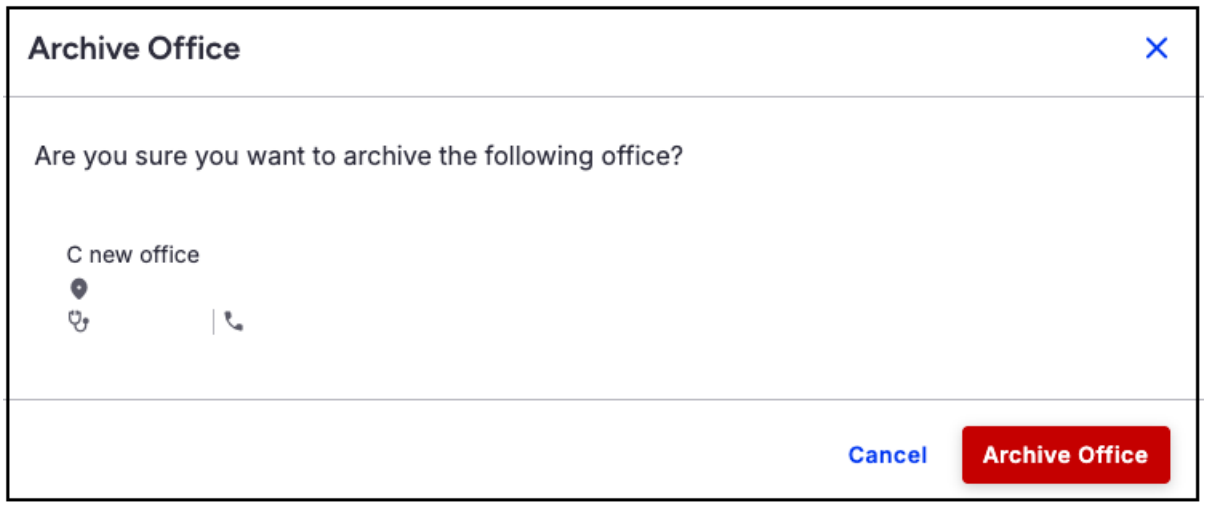
Archiving / Unarchiving Offices

To archive an unused office:

1. Select the three horizontal dots on the right and select **Archive**.

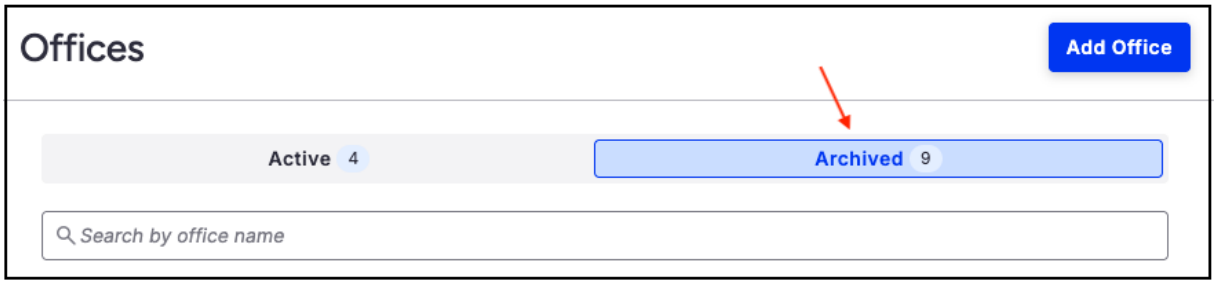


2. A pop-up screen will appear to confirm the action.

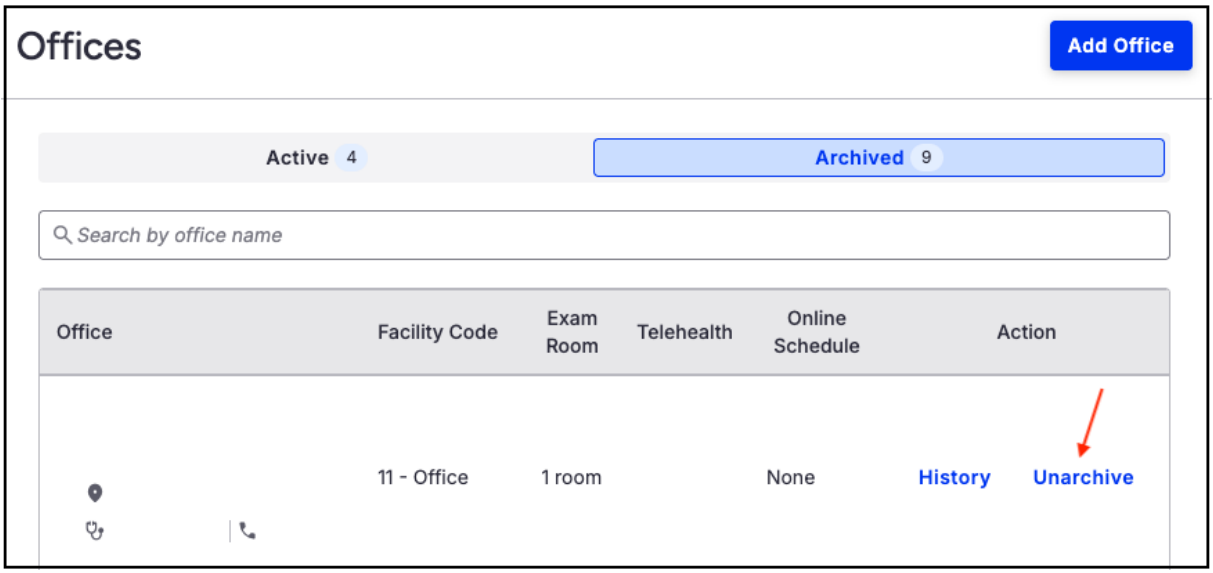


3. Once an office is archived, all appointments associated with the office will also be archived.

4. Your archived offices will appear under **Archived Offices**.



5. To unarchive an office, select the **Unarchive** button.



6. Once an office is unarchived, the appointments associated with that office will also become unarchived.