

Office Setup and Management

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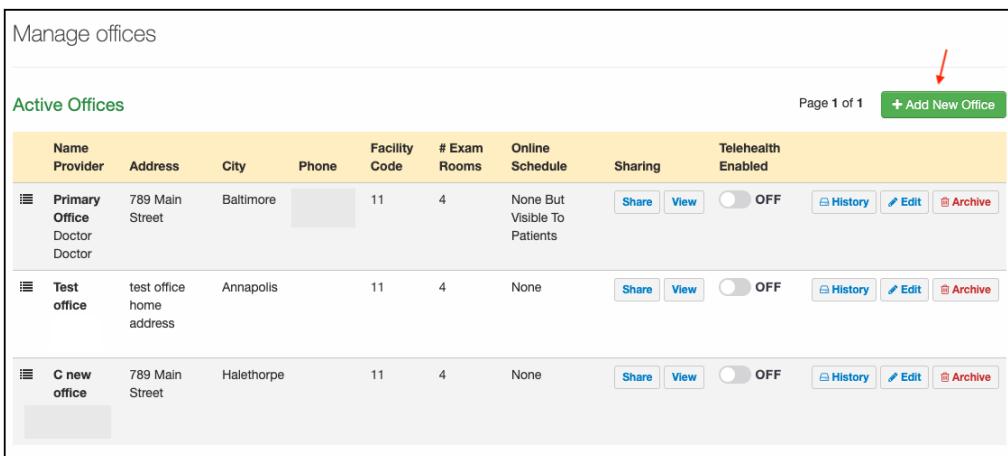
Creating single or multiple offices within your DrChrono account will keep your appointments organized and the billing information for each office correct on claims.

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.



The screenshot shows a table titled 'Manage offices' with a header 'Active Offices'. The table has columns: Name, Provider, Address, City, Phone, Facility Code, # Exam Rooms, Online Schedule, Sharing, and Telehealth Enabled. There are three rows of data:

Name	Provider	Address	City	Phone	Facility Code	# Exam Rooms	Online Schedule	Sharing	Telehealth Enabled
Primary Office	Doctor	789 Main Street	Baltimore	[redacted]	11	4	None But Visible To Patients	Share View <input type="checkbox"/> OFF History Edit Archive	
Test office		test office home address	Annapolis	[redacted]	11	4	None	Share View <input type="checkbox"/> OFF History Edit Archive	
C new office		789 Main Street	Halethorpe	[redacted]	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)	<input type="text"/>	Used in HCFA box#32 and UB04 box#2. Leave it blank if same to Office name (Scheduling)
Facility name	<input type="text"/>	
Primary Provider	<input type="text"/>	
Country	<input type="text"/>	
Address	<input type="text"/>	
Zip Code	<input type="text"/>	
State	<input type="text"/>	
Canadian postal code	<input type="text"/>	
Canadian province	<input type="text"/>	
City	<input type="text"/>	
Office Phone	<input type="text"/>	Not validated. Click here to verify with a test call.
Fax	<input type="text"/>	
Formatted Address	<input type="text"/>	Not editable. Only valid for US addresses.

Number of Exam Rooms	<input type="text" value="1"/>	
Exam Name 1	<input type="text"/>	<input type="checkbox"/> Allow Online Scheduling <input type="checkbox"/> Excluded from Meaningful Use <input type="checkbox"/> Archived from Calendar
Office hours start	<input type="text" value="6:00 am"/>	
Office hours end	<input type="text" value="8:00 pm"/>	
Require reason when deleting appointments	<input type="checkbox"/>	

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

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Billing name	<input type="text"/>	Leave it blank if same to account settings.
Facility Code	<input type="text"/> 11 - Office	
Billing Provider Office	<input type="text"/>	Professional medical billing only.
Use facility NPI number in box 32a of HCFA form	<input type="checkbox"/>	
Facility NPI number	<input type="text"/>	Used in HCFA box#32a and UB04 box#56
Facility provider number	<input type="text"/>	
Billing Tax ID # (professional)	<input type="text"/>	Leave it blank if same to account settings.
Billing NPI number	<input type="text"/>	Leave it blank if same to account settings.
CLIA Number	<input type="text"/>	CLIA # for billing. Leave it blank if same to account setting.
CLIA Expiration Date	<input type="text"/>	Expiration date for CLIA number.
Use alternate pay to address for EDI	<input type="checkbox"/>	use alternate "pay to" address in EDI billing if checked.
Use alternate pay to address for HCFA	<input type="checkbox"/>	use alternate "pay to" address in HCFA form block 33 if checked.
Use alternate pay to address in Patient Statement	<input type="checkbox"/>	use alternate "pay to" address in patient statement if checked.

Institutional Medical Billing 

Use alternate pay to address in Hospital Claim	<input type="checkbox"/>	use alternate "pay to" address in 837I billing and UB-04 form if checked.
Facility Tax ID # (institutional)	<input type="text"/>	Leave it blank if same to account settings.
Facility Type	<input type="text"/> -----	default value for UB04 box 4
Care Type	<input type="text"/> -----	default value for UB04 box 4
Billing Sequence	<input type="text"/> -----	default value for UB04 box 4
Admission Type	<input type="text"/> -----	default value for UB04 box 14
Origin Point	<input type="text"/> -----	default value for UB04 box 15
Discharge Status	<input type="text"/> -----	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.

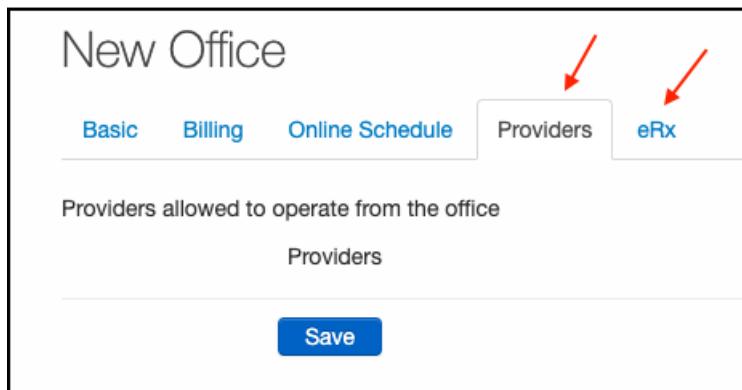
New Office

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Show this office information online	<input type="checkbox"/>
Allow online scheduling in this office	<input type="checkbox"/>

[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](#).



New Office

Basic Billing Online Schedule Providers eRx

Providers allowed to operate from the office

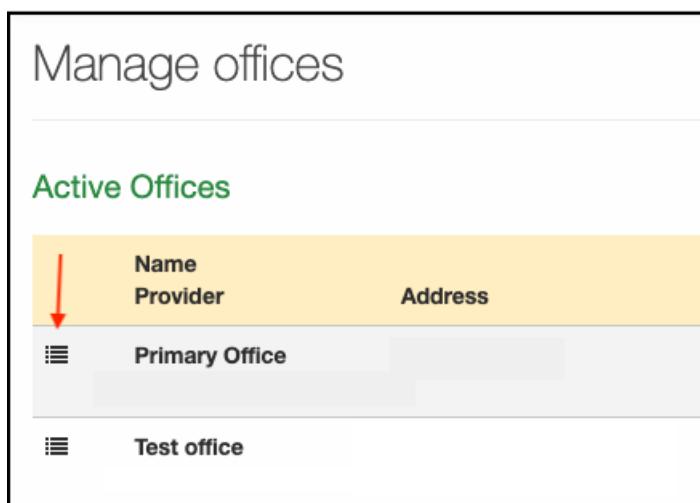
Providers

Save

Organizing Your Offices

Reordering offices

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



Manage offices

Active Offices

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