Archiving and Changing Offices

07/08/2024 7:49 pm EDT

Practice groups change over time, and when they do, changes need to be made in order to keep your EHR updated. For example, you are moving locations. If a provider is removed from a practice group, their office will still remain. If you have any offices that are in a provider's name, you'll either need to change the provider and/or name of the office or archive the office.

Note: When an office is archived, the appointments attached to the office are also archived. If you archive an office and wish to keep the appointments, you'll need to transfer the appointments to a new office prior to archival. Archiving is not a permanent action and may be undone to retrieve archived appointments.

Archiving an Office

To archive an office, you'll need to access the Office Management page.

- To begin, go to **Account** and select **Offices**.

- You'll be presented with the 'Manage Offices' page. Here you will see a list of your active offices, their location, phone number, facility code, number of exam rooms, and their settings for online scheduling.

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

- To the right of the office you wish to archive, there are four buttons: Share, View, Edit, and Archive. Select the **Archive** button and your office will be archived.

Your archived offices will then appear in the section below. You may select **Unarchive** to retrieve an office. Any existing appointments attached to an archived office will be unarchived when the office is retrieved.

Updating an Office

To update an office's name, provider, address, exam rooms, and operating hours, select the **Edit** button to the right of the office you would like to edit.

The 'Edit Office' form will open. Here you can edit any attributes of the office using the fields provided. Once you are done, select **Save** at the bottom of the screen, and your new updated office information will be saved to the DrChrono EHR.

Edit Office

Basic Billing Online Schedule

⚠ **Warning:** Changing the address of an office affects all previous appointments in that office.

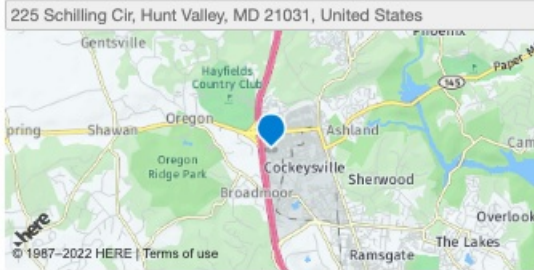|		
Office name (scheduling)	Office 1	
Facility name		Used in HCFA box#32 and UB04 box#2. Leave it blank if same to Office name (Scheduling)
Primary Provider	Dr. James Smith ▾	
Country	UNITED STATES ▾	
Address	225 Schilling Circle	
Zip Code	21031	
State	Maryland ▾	
City	Hunt Valley	
Office Phone	(443) 555-5555	Not validated. Click here to verify with a test call.
Fax	301-850-2018	
Formatted Address	225 Schilling Cir, Hunt Valley, MD 21031, United States	Not editable. Only valid for US addresses.

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Number of Exam Rooms	3 ▾			
Exam Name 1	Exam 1	☑ Allow Online Scheduling	☐ Excluded from Meaningful Use	☐ Archived from Calendar
Exam Name 2	Exam 2	☑ Allow Online Scheduling	☐ Excluded from Meaningful Use	☐ Archived from Calendar
Exam Name 3	Exam 3	☑ Allow Online Scheduling	☐ Excluded from Meaningful Use	☐ Archived from Calendar
Office hours start	7:00 am ▾			
Office hours end	5:00 pm ▾			
Require reason when deleting appointments	☐			

Save