

How do I backup all of my information within DrChrono?

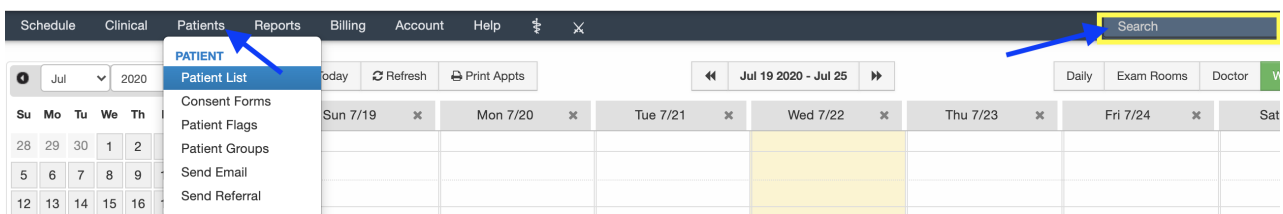
Last modified on 12/09/2024 1:42 pm EST

DrChrono offers a number of ways to backup your information. You can learn how to export your patient demographics by going [here](#). There are a lot of other things that you can export and you will learn through this article.

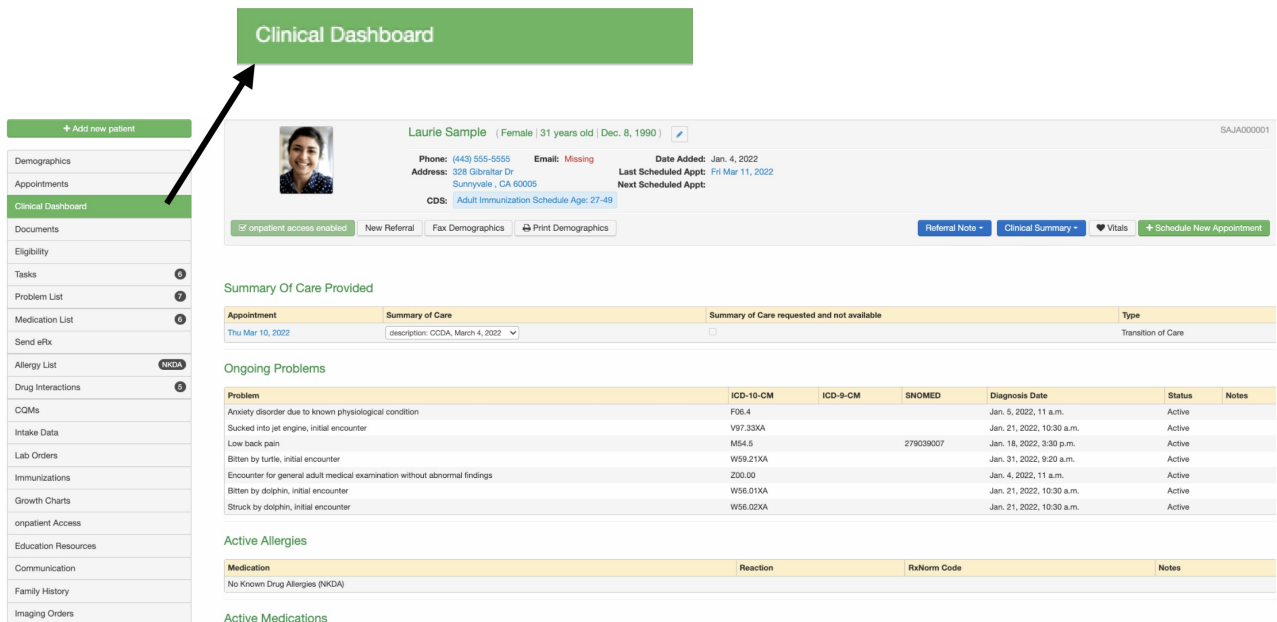
Additional Patient Information

A patient's medications, allergies, immunizations, and problem lists will have to be manually exported for each patient. Please follow the steps below to learn how to do this.

1. From the **Patients** drop-down, please click on **Patient List** and select the patient whose record you would like to export. Or you can use the **Search** box to look up the patient.



2. Once in the patient's file please choose **Clinical Dashboard** from the side menu.



3. At the top right of the page click on **Clinical Summary** and choose **Download PDF** from the drop-down menu.

Laurie Sample (Female | 31 years old | Dec. 8, 1990) SAJA00001

Phone: (443) 555-5555 Email: Missing Date Added: Jan. 4, 2022
 Address: 328 Gibraltar Dr Last Scheduled Appt: Fri Mar 11, 2022
 Sunnyvale, CA 60005 Next Scheduled Appt:
 CDS: Adult Immunization Schedule Age: 27-49

onpatient access enabled

Download PDF (will appear in Message Center)

- Download C-CDA XML
- Display C-CDA XML
- Customize Clinical Summary (XML or PDF)
- Send to Onpatient
- Send Direct Message

Last generated at March 11, 2022, 4:08 p.m.

Summary Of Care Provided

Appointment	Summary of Care	Summary of Care requested an	Type
Thu Mar 10, 2022	description: CCDA, March 4, 2022	<input type="checkbox"/>	Transition of Care

Ongoing Problems

Problem	ICD-10-CM	ICD-9-CM	SNOMED	Diagnosis Date	Status	Notes
Anxiety disorder due to known physiological condition	F06.4			Jan. 5, 2022, 11 a.m.	Active	
Sucked into jet engine, initial encounter	V97.33XA			Jan. 21, 2022, 10:30 a.m.	Active	
Low back pain	M54.5		279039007	Jan. 18, 2022, 3:30 p.m.	Active	
Bitten by turtle, initial encounter	W59.21XA			Jan. 31, 2022, 9:20 a.m.	Active	
Encounter for general adult medical examination without abnormal findings	Z00.00			Jan. 4, 2022, 11 a.m.	Active	
Bitten by dolphin, initial encounter	W56.01XA			Jan. 21, 2022, 10:30 a.m.	Active	
Struck by dolphin, initial encounter	W56.02XA			Jan. 21, 2022, 10:30 a.m.	Active	

Active Allergies

The export will include:

- Demographics
- Allergies, Adverse Reactions, Alerts
- Encounters
- Family History
- Immunizations
- Instructions
- Medications Administered
- Medications
- Insurance Providers
- Plan of Care
- Problems
- Procedures
- Lab Tests
- Results
- Social History
- Vital Signs

The contents of the PDF are the same as a C-CDA export and the information is pulled from the same sources in DrChrono. For more information see our article [here](#).

The file will be in your Message Center (



) when complete.

Schedule Clinical Patients Reports Billing Account Marketplace Help Search

ALL MESSAGES

- Incoming Messages
- ★ Starred
- ☰ All Messages

FAX

- Incoming Fax
- ← Outgoing Fax

Incoming Messages ?

Mark as Read Mark as Unread Show Archived Search Messages

	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated PDF: SAJA000001.pdf					March 24, 2022, 1:53 p.m.	March 24, 2022, 2:39 p.m.

Click on the file to view it. From here you can print or download the file.

Patient Health Summary			
Patient	Laurie Sample		
Date of birth	December 8, 1990	Sex	Female
Race	Unknown Unknown	Ethnicity	Unknown
Contact info	Primary Home: 328 Gibraltar Dr Sunnyvale, CA 60005, US Tel (Cell): (443) 555-5555	Preferred Language	Information not available
		Patient IDs	SAJA000001 2.16.840.1.113883.3.7621
Document Created	March 24, 2022, 13:53:10, EST		
Care provision	from January 4, 2022, 09:37:00, EST to March 24, 2022, 13:53:10, EST		
Performer (primary care provider)			
Author			
Contact info	225 Schilling Circle Hunt Valley, MD 21031, US Tel (Work Place): 410-555-5555		
Document maintained by			
Contact info	Work Place:		

If you needed to export Immunizations separately, go to the **Immunizations** section of the patient's chart. Click on **Print Immunization Record**.

+ Add new patient

- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 6
- Problem List 7
- Medication List 6
- Send eRx
- Allergy List NKDA
- Drug Interactions 5
- CQMs
- Intake Data
- Lab Orders
- Immunizations

Laurie Sample (Female | 31 years old | Dec. 8, 1990) ✎

Phone: (443) 555-5555 **Email:** Missing **Date Added:** Jan. 4, 2022

Address: 328 Gibraltar Dr
Sunnyvale, CA 60005 **Last Scheduled Appt:** Fri Mar 11, 2022

Next Scheduled Appt:

CDS: Adult Immunization Schedule Age: 27-49

onpatient access enabled
New Referral
Fax Demographics
Print Demographics
Download HL7 Immunization Record
Print Immunization Record

Immunizations

Step 1: Select Vaccines Step 2: Review and Sign Step 3: Record Vaccinations

Print Immunization Record

Step 1. Select Vaccines

Birth - 2 years 2 - 18 years Adult Other

Schedule	Vaccine	Cvx Code	Consent Form	VIS	Administ On
Recurring	FLU	Influenza, high dose seasonal <input type="text"/>	View		3/24/22
Recurring	Td	<input type="text"/>			

From here you can print or download the Immunization Record.

Immunization Records | DrChrono 1 / 1 | - 100% + | [] [] [] []

Immunization Records

Primary Provider: **Provider's Phone:** (443) 555-5555 **Date:** 03/24/2022
Patient Name: Laurie Sample **Date of Birth:** December 8, 1990 **Patient ID:** SAJA000001

Influenza (yearly)								
Type	Manufacturer	CVX	Amount	Date Given	Administered By	Next Dose Date	Lot	Site
Influenza, high dose seasonal	None	135	unknown	03/24/2022	Ordered by: Dr. James Smith		#: None Expiry:	LA
Other								
Type	Manufacturer	CVX	Amount	Date Given	Administered By	Next Dose Date	Lot	Site
COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose	None	208	unknown	03/24/2022	Ordered by: Brendan Wilberton		#: None Expiry:	LA

Powered by drchrono

Billing

You are able to export your HCFA forms as a PDF for each patient, or all at once. It is recommended you do one patient at a time, so it makes it easier to attach it to a patient's file. The exported HCFA forms will appear in your message center.

Please go to the **Billing** drop-down and click on **Lives Claims Feed**.

Billing
Account
Help
⚕️
✕

BILLING

- Billing Summary
- Live Claims Feed
- Patient Payments (Beta)
- Day Sheet
- Transactions
- Remittance Reports
- Unmatched ERAs
- Accounts Receivable
- Patient Statements
- Product/Procedure
- Patient Balance Ledger
- Fee Schedule
- Underpaid Items
- Adjustment Master
- Sales Tax
- Billing Log

BUSINESS INTELLIGENCE

- Denial Analysis 2.0
- Payment Analysis 2.0

CODING

- Code Search
- New Custom Procedure
- Custom Procedures

ENROLLMENTS

- Bulk Edit Payer IDs
- Insurance Setup
- Payer Search

Note: You are only able to select 50 appointments at a time. For example, if you have 5000 appointments you will need to export them 100 times and change the filter criteria each time.

Here, please enter your search criteria, and select **Update Filter**. You have multiple options to print under the **Export to File** menu when you click on the (



) icon next to the **Export to File** button.

Note: Clicking directly on the **Export to File** button to the left of the (



) Print HCFA options will only export the details of the claim in a CSV file, and not the line items that you would get when you print out the entire form.

Live Claims Feed

Select All Offices | Select None | Office 1 All | Office 2 All | Office 3 All | Office 4 All

Claim St: All | Billing St: All | Appt Profiles: All | Calculate Counts | What's this? | TFL Warning

Promo Code

Patient: [dropdown] | Payer Name: [dropdown] | Payer ID: [input] | drc claim #: [input] | 02/01/2021 - 03/24/2022 | Clinical Note: [dropdown]

Open window in new tab | Check All | Clear | Update Filter

Batch Status Change | Export to File | Custom Export | Display | Schedule | Internal

Info	Claim ID	Patient	Supervising Provider	Billed	Allowed	Adjmt	Ins 1 Paid	Ins 2 Paid	Pt Paid	Ins Bal	Pt Line Item Bal	Claim Bal	Exp Reimbr	Ins 1	Ins 1 Status	Ins 2	Ins 2 Status
Totals:				\$1,210.00	\$1,210.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,210.00	\$0.00	\$1,210.00	\$50.00				
<input checked="" type="checkbox"/>	204685548	Laurie Sample 3/11/2022 08:10AM	Office 1	\$146.00	\$146.00	\$0.00	\$0.00	\$0.00	\$0.00	\$146.00	\$0.00	\$146.00	\$0.00	United HealthCare	Not Submitted		
<input checked="" type="checkbox"/>	204980904	Laurie Sample 3/10/2022 03:15PM	Office 1	\$276.00	\$276.00	\$0.00	\$0.00	\$0.00	\$0.00	\$276.00	\$0.00	\$276.00	\$0.00	United HealthCare	Not Submitted		

You can change the billing status if needed. Select **Print**. You will see a message in the top left corner.

Print HCFA

And change billing status to: -- Not Changed --

Print

Exporting... When complete, you will see exported data in Message Center.

Billing Summary | Live Claims Feed

Once the forms are generated they will show up in your Message Center (



), and from there you will be able to attach them to a patient file or view the document. If you choose to view the document, you will be able to print it out or save it to a file without having to assign it to a specific patient file.

Billing | Account | Marketplace | Help | Search | Message Center icon

Back to Messages | Mark as Unread | Archive Message | Print | Fax

Generated PDF: hcfa_forms_03_24_2022.pdf | Create task

From: drchrono | Thursday, March 24, 2022 3:19 PM

Save Attachment to Patient Chart | View Document | Audit Log

Notes

Rotate all pages | Clockwise | Counter Clockwise

205858_b0d4590e-d239-4631-9574-d0d5ebb8eccf.pdf | 1 / 13 | 100%

HEALTH INSURANCE CLAIM FORM

UNITED HEALTHCARE
FO BOX 30555
SALT LAKE CITY, UT 84130-0975

1. MEDICARE MEDICAID TRICARE CHAMPVA GROUP HEALTH PLAN OTHER 123456789

2. PATIENT'S NAME (Last Name, First Name, Middle Initial) Sample, Laurie

3. PATIENT'S BIRTH DATE 12/08/1990 M

4. INSURED'S NAME (Last Name, First Name, Middle Initial) Sample, Laurie

5. PATIENT'S ADDRESS (No. Street) 328 Gibraltar Dr

6. PATIENT RELATIONSHIP TO INSURED Spouse

7. INSURED'S ADDRESS (No. Street) 328 Gibraltar Dr

8. RESERVED FOR NUCC USE

CITY Sunnyvale STATE CA ZIP CODE

You are also able to export all appointments with CPT and ICD-10 details.

Please go to **Reports > Advanced Report** and select **Custom Export**. Please ensure the **Appointments** tab is selected.

Advanced Report

Appointments Patients

Saved Filters Patient Filters Appointment Filters Appointment Status Billing Status Copay Method Insurance Status

No filters selected

Filter by patient only | Archived exam rooms Include | Breaks Excluded | Show 50 per page Update Filter Save Filter

Send Email Create Patient Group Export to File

Date of Service	Provider	Office	Examroom	Appt Status
Mar 17, 2022 1:50:00 PM	Dr. James Smith	Office 1	Exam 1	

Quick Export
Custom Export

Select the data you would like to include in your report under both the **Patient** and **Appointment** tabs. Codes are under the Appointment Filters. You can also use the **Check All** option to include all of the filters. You can name your report if needed. Click **Export** when finished.

Custom Export

Report Name Advanced Report

Patient (17) Appointment (23) Clinical Note Doctor

Check All Uncheck All

Full Name Mailing Zip Code Emerg Contact Phone
 First Name Date of First Appointment Emerg Contact Relation
 Last Name Date of Last Appointment Referring Doctor
 Chart ID Date of Next Appointment Ref Dr. Email
 Date of Birth Primary Ins Payer Ref Dr. Phone
 Primary Provider Primary Ins Payer ID Ref Dr. Fax
 Home Phone Primary Member ID Ref Source
 Cell Phone Primary Ins Plan Name Employer
 Office Phone Primary Ins Group # Employer Zip Code
 Email Secondary Ins Payer Employer Address

Close Export

Custom Export

Report Name Advanced Report

Patient (17) Appointment (23) Clinical Note Doctor

Check All Uncheck All

Claim ID Primary Insurer Paid Created Time
 Date of Service Secondary Insurer Paid Appointment Flags
 Office Primary Insurer Status Temperature
 Examroom Secondary Insurer Status Pulse
 Provider Patient Paid Blood Pressure Systolic
 Appt Profile Insurance Balance Blood Pressure Diastolic
 Appt Status Patient Balance Respiratory Rate
 Reason Expected Reimbursement Oxygen Saturation
 Billed Time First EDI Date Height
 Billing Status Last EDI Date Weight

Close Export

The report will generate in your Message Center (



).

Billing Account Marketplace Help Search

Back to Messages Mark as Unread Archive Message Search Messages

Generated Sheet: Advanced Report.zip

From: drchrono Thursday, March 24, 2022

Save Attachment to Patient Chart Download Document Audit Log

If you would like to search for non-specific ICD-10 and CPT/HCPCS appointment information you are able to do that by going to **Reports > Appointment Report**.

PRACTICE REPORTS

- Account / User Report
- Productivity Report
- Reminder Report
- Outgoing Prescriptions
- Patient Insurance Authorization
- Appointment Report**

Enter the search criteria to find what you are looking for. When you have entered in your search criteria select **Update Filters**.

Appointment Report

Appointment Status Check All Uncheck All

- Arrived
- Auto Accident
- Cancelled
- Checked In
- Checked In Online
- Checked Out
- Complete
- Confirmed
- In Room
- Needs Supervising
- No Show
- Not Confirmed
- Read for Clinician
- Ready for Dictation
- Home
- In Session
- Rescheduled
- Televisit
- Transfer
- Waiting for lab results
- DND
- None


Billing Status Check All Uncheck All

- Paid In Full
- Settled
- Bill Insurance
- Bill Secondary Insurance
- Worker's Comp Claim
- Auto Accident Claim
- Durable Medical Equipment Claim
- Analyst Review
- Ready To Bill
- Write off
- Balance Due
- Internal Review
- Authorization Requested
- Don't submit to insurance
- Authorization Received
- Mailed Claim
- Eligibility Confirmed
- Chrono Appeal
- Chrono Audit
- Coding Clarification
- Coding Clarified
- Coding Completed
- Insurance Payment
- Faxed/Mailed Claim or Appeal
- Internal Coding Review
- Patient Contact
- Pending Info Practice
- Pending Statement Approval
- Ready To Code
- Ready for Statement
- Specialist Review
- In Process w Payer
- Paid not Posted

Patient Search All Offices All Rooms 03/17/2022 - 03/24/2022 **Update Filters**

Show ICD9/ICD10 and CPT/HCPCS information

Export to File

Once you have successfully found the information you are looking for, choose the **Export to File** button. The report will then be sent to your Message Center () as a .CSV file for you to save how you see fit.

Billing Account Marketplace Help Search

[Back to Messages](#) Mark as Unread Archive Message

Generated Sheet: appointment_report_03_24_2022.csv Create

From: drchrono Thursday, March 24, 2022

[Save Attachment to Patient Chart](#) [Download Document](#) [Audit Log](#)

Notes

+ Add

Date of Service	Doctor	Patient	Cell Phone #	Home Phone #	Office Phone #	Email	Office	Examroom	Appointment Status	Billing Status
2022-03-17 13:50:00	Dr. James Smith	Jenny (Jen) Harris	(650) 215-8343	(844) 569-8628			Office	Exam 1		