

# Account Settings: General

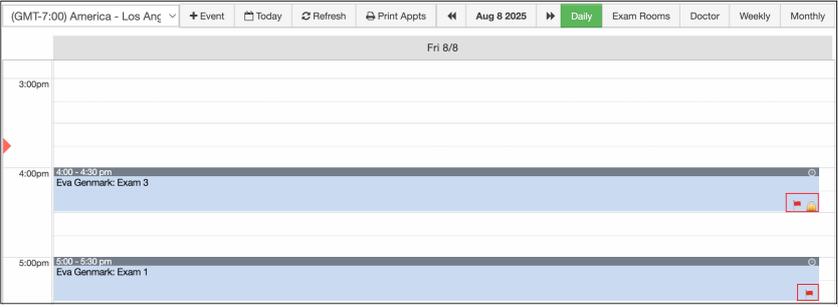
Last modified on 03/06/2026 6:50 pm EST

[Calendar Settings](#) | [Appointment Settings](#) | [MIPS Decision Support Intervention](#) | [Clinical Notes](#) | [Patient Vitals](#) | [Communications](#)

## Open the General tab

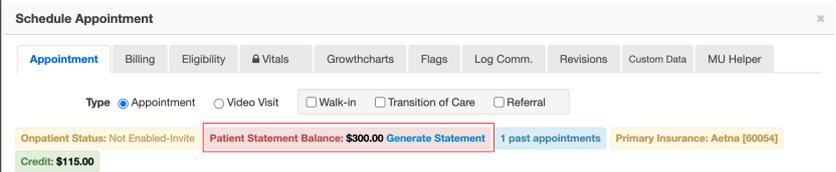
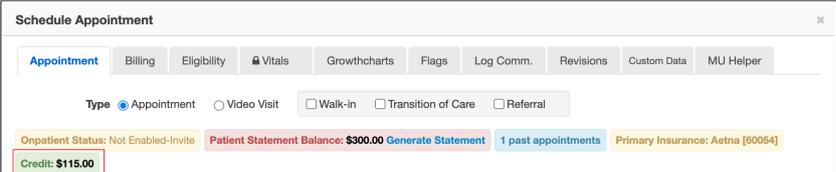
Select **Account** > **Account Settings** > **General** tab.

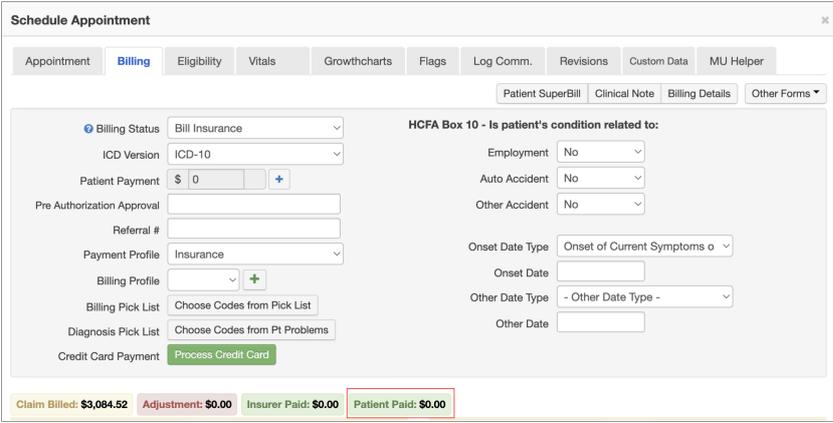
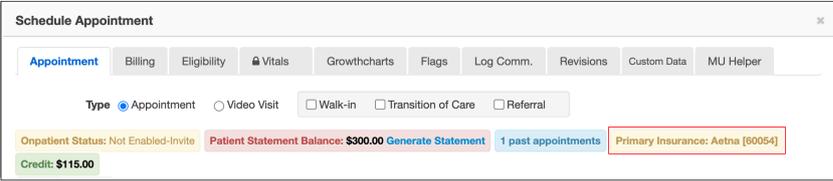
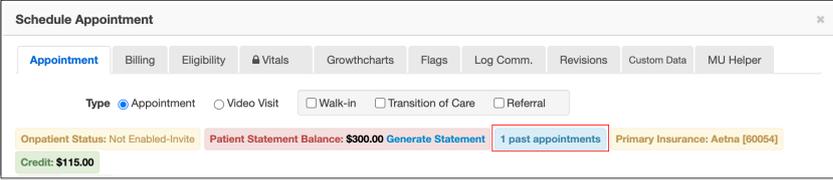
## Calendar Settings

Setting	Description
Display flag icon on appointment	Show the flag  icon on <b>Calendar</b> appointments when a patient has a flag in their chart or appointment. See the image in the next row. <a href="#">What do the lock and flag icons on my appointments mean?</a>
Display lock icon on appointment	Show the lock  icon on the <b>Calendar</b> appointment when the clinical note is locked.  <a href="#">What do the lock and flag icons on my appointments mean?</a>
Use new dashboard homescreen	Set the <b>Dashboard</b> or the <b>Calendar</b> as your default landing page. If you set the <b>Dashboard</b> as the default landing page in <b>Account Settings</b> , it's also set in <b>Dashboard Settings</b> .
Show user satisfaction survey	Opt in to receiving user satisfaction surveys.
Default Office	Set the default office in the <b>Calendar</b> . The default office determines which office location is listed in the provider's contact information on documents such as referrals and C-CDA files.
Additional Offices	Providers can manage their office associations in their practice group by adding or removing offices. Archived offices do not appear in the dropdown. Any changes made here are automatically reflected on the <b>Offices</b> page ( <b>Account</b> > <b>Offices</b> > <b>Edit</b> (for a specific office) > <b>Providers</b> tab). <div style="border: 1px solid #add8e6; padding: 10px; margin-top: 10px;"><p> While this update is currently focused on allowing providers to indicate their office affiliations, it also lays the groundwork for the future ability to limit provider availability by office. At this stage, it's purely a UI update to allow providers to set their preferences ahead of that transition.</p></div>

Setting	Description
Duration of Exam Duration of Follow-up Examroom Calendar Increments	Set the default duration for exams, follow-ups, and calendar time increments when scheduling appointments for the provider. <a href="#">📖 Setting a Default Appointment Time</a>
Date range on Appointment Template	Set a start and end date for the appointment templates on your calendar. <a href="#">📖 How do I add a date range to my appointment templates?</a>
Appointment Templates in more views	Allow appointment templates to appear in all calendar views except monthly. <a href="#">📖 Enabling Appointment Templates in All Calendar Views</a>
Allow Exam Room Overlaps	Allow multiple appointments to be scheduled at the same time in the same exam room, even if they overlap. <a href="#">📖 How do I schedule multiple appointments in the same exam room at one time?</a>
Global Overlap Checking	Prevent overlapping appointments to be scheduled at the same time in the same exam room. <a href="#">📖 Enabling or Disabling Overlapping Appointments</a>
Appointment Default Color	Set a default appointment color for this provider's appointments <a href="#">📖 How can I change the default appointment color?</a>
Phonetic Name	Set the pronunciation of your name for reminders. <a href="#">📖 How do I change the pronunciation of my name in appointment reminders?</a>
Hide cancelled appointments Hide rescheduled appointments	Hide canceled and rescheduled appointments from the <b>Calendar</b> . <a href="#">📖 Hiding Canceled and Rescheduled Appointments from the Schedule</a>
Duplicate appointment warning	Show a warning message when multiple appointments are scheduled for the same patient on the same day. <a href="#">📖 Duplicate Appointment Warning</a>

## Appointment Settings

Setting	Description
Access to online scheduling	Allow patients to schedule online through OnPatient or the scheduling widget. <a href="#">📖 Enabling Online Scheduling in Your Office</a>
Patient's Statement Balance	Show the patient's statement balance as a flag in the appointment window and generate a statement if needed. 
Patient's Current Balance	Show the patient's current balance as a flag in the appointment window. 

Setting	Description
Claim's Billing Information	<p>Show the billing information for claims on the <b>Billing</b> tab of the appointment window.</p> 
Patient's Insurance	<p>Show flags in the appointment window for the patient's insurance.</p> 
Patient's Flag	<p>Show patient flags in the appointment window.  <a href="#">📖 Patient Flags</a></p>
Appointment Count	<p>Allows you to view the number of past appointments the patient has had as a flag in the appointment window.</p> 
Matched DSI Rules	<p>Turn this setting on to view flags based on Decision Support Intervention rules. <a href="#">📖 CDS Rule Flags in the Appointment Window</a></p>
Allow inactive deceased patient appointments	<p>Allow creating new appointments for patients who have the <b>Inactive-Deceased</b> chart status.</p>
Auto Appointment Reminders	<p>The patient's most recent reminders are automatically selected when scheduling appointments.</p>
Limit Patient Flags to Appointment	<p>Show only flags associated with the current appointment in the appointment window.  <a href="#">📖 How do I add a patient flag to an appointment?</a></p>
Autorun Eligibility	<p>You can enter the number of days before the appointment to auto-run an eligibility check. If left blank, eligibility check won't be run.  <a href="#">📖 Save Time with Auto Eligibility Checks</a></p>
Gender & Identity	<p>Hide the dropdown menus for gender and identity in the patient chart, the DrChrono OnPatient app, and the DrChrono Check-In app.  <a href="#">📖 Adding Gender Identity and/or Sexual Orientation to a Patient's Chart</a>  <a href="#">📖 Adding Gender Identity and Sexual Orientation to the Check-In App</a></p>

## MIPS Decision Support Intervention

Use the **Severity Level of Interventions** setting to specify which severity levels appear for drug-to-drug and drug-to-allergy interactions.

### Clinical Notes

Setting	Description
Include Practice Official Name	Add the practice name from the <b>Medical Billing</b> tab to the clinical note's header.
Include Business Logo	Select the business logo's location—top left or top center—on the clinical note's header.
Include Patient Chart Photo	Includes the patient chart photo to the clinical note's header.
Include Office Information	Adds the office name and address to the information to the clinical note's header.
Include Payer IDs	Add the patient's primary and secondary payer IDs to the clinical note's header.



**Family Practice**

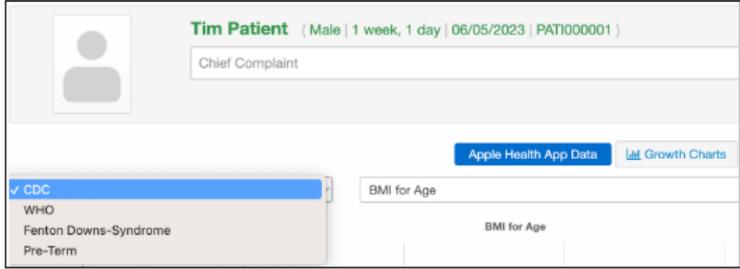
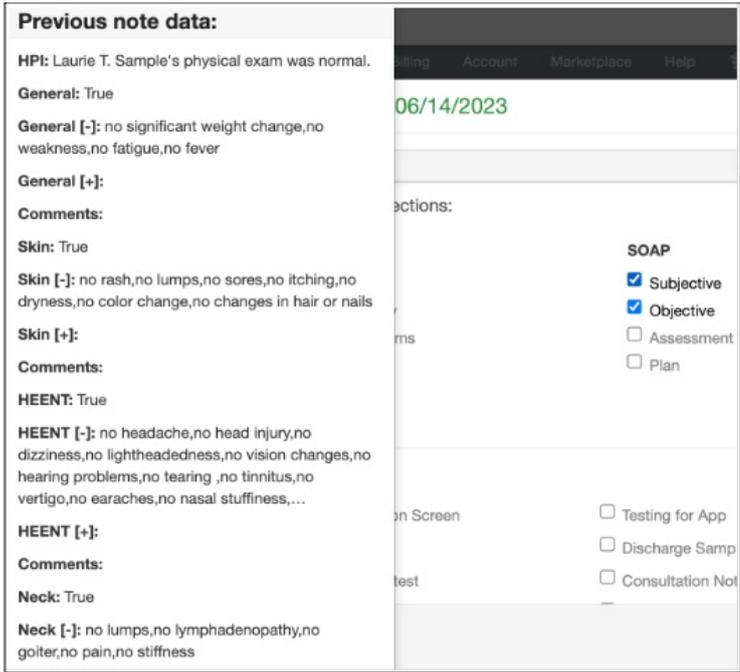


**Patient:** Laurie T. Sample  
**Provider:** Dr. James Smith  
**Office:** Office 2  
**Primary Payer ID:** 87726

**DOB:** 12/08/1990  
**Visit:** 06/09/2023 8:00AM  
**Address:** 345 Fake Street, Baltimore, MD, 12345  
**Secondary Payer ID:** PAI02

**Sex:** F  
**Chart:** SAJA000001

Setting	Description																																				
Include Lab Orders and Results	<p>Show lab orders and results in the <b>Plan</b> section of the clinical note.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Plan:</b></p> <p><b>Lab Results:</b></p> <table border="1"> <thead> <tr> <th>Test</th> <th>Normal Range</th> <th>2023-03-28</th> <th>2022-03-31</th> <th>2022-02-24</th> <th>2019-04-04</th> </tr> </thead> <tbody> <tr> <td>LOINC 11502-2 Laboratory report</td> <td>8-12</td> <td>-</td> <td>14 mg/dl</td> <td>10 Units</td> <td>-</td> </tr> <tr> <td>LOINC 14583-1 Hemoccut sp1 SII QI</td> <td>5-15</td> <td>10 ml</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Sample Lab - 123456 Sample Test #1</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>Not detected</td> </tr> <tr> <td>Sample Lab - 456789 Sample Test #4</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>Outlook not so good</td> </tr> <tr> <td>Sample Lab - 678901 Sample Test #6</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>4.82 mL</td> </tr> </tbody> </table> </div>	Test	Normal Range	2023-03-28	2022-03-31	2022-02-24	2019-04-04	LOINC 11502-2 Laboratory report	8-12	-	14 mg/dl	10 Units	-	LOINC 14583-1 Hemoccut sp1 SII QI	5-15	10 ml	-	-	-	Sample Lab - 123456 Sample Test #1	-	-	-	-	Not detected	Sample Lab - 456789 Sample Test #4	-	-	-	-	Outlook not so good	Sample Lab - 678901 Sample Test #6	-	-	-	-	4.82 mL
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Render H&P Physical Exam Text Before Vitals	<p>The physical exam narrative text appears before the vitals tables in the history &amp; physical (H&amp;P) clinical note.</p> <p><a href="#">Clinical Notes: Using the "Render H&amp;P Physical Exam Text Before Vitals" Setting</a></p>																																				
Reduce Header and Footer Font Size	<p>Reduce the clinical note's header and footer font size.</p> <p><a href="#">Reducing the Header and Footer Size on a Clinical Note</a></p>																																				
Move Non-SOAP FreeDraws to End	<p>Move the images used in FreeDraw fields to the end of the note.</p> <p><a href="#">Detailed Clinical Note Formatting</a></p>																																				

Setting	Description
Default to CDC Growth Charts	<p>Default to the CDC's growth charts in the account.</p> 
Hide Medications & Allergies by Default	<p>Hide a patient's medications and allergies from the clinical note. <a href="#">How do I hide medications and allergies from the clinical note?</a></p>
Hide CPT & ICD on Clinical Notes by Default	<p>Hide CPT codes and ICD-10 diagnosis codes from the clinical note. <a href="#">Excluding Diagnosis and Billing codes from Clinical Notes</a></p>
Allow Chief Complaint to be Persistent	<p>The patient's chief complaint (the reason for visit in the appointment window) automatically populates the <b>Chief Complaint</b> field in the clinical note and the <b>Reason</b> field in the appointment window. This information is pulled from the most recent visit.</p>
Preview Previous Note	<p>A preview of the contents of the previous note shows when you hover over the form in the selection screen.</p> 
Default CCDA Clinical Note Source	<p>Select where the provider's default CCDA note is pulled from.</p>
Default CCDA Clinical Note Type	<p>Select the provider's default CCDA clinical note type.</p>
Include Care Plan	<p>Include care plans in the clinical note PDF. The care plan will be in a table on a new page within the PDF.</p>

## Patient Vitals

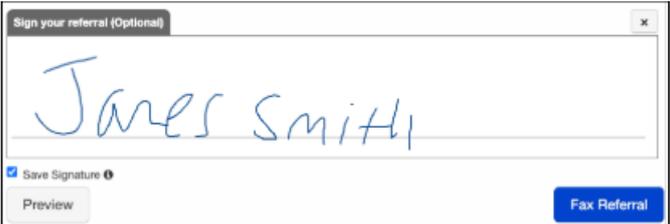
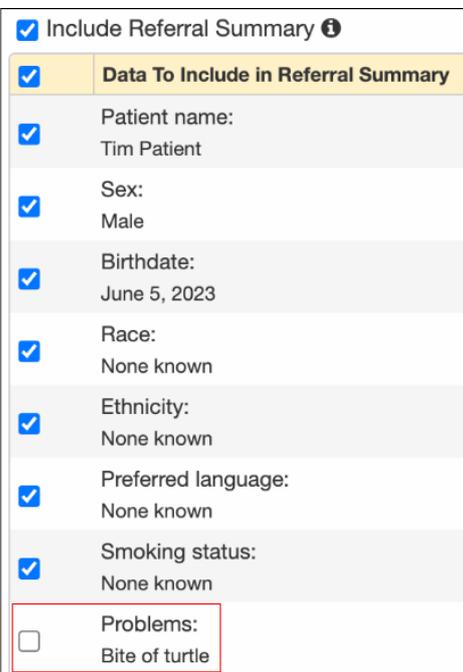
Use the **Patient Vitals** settings to choose default units—metric or customary—for weight, height, head circumference, and temperature when entering vital signs.

## Patient Vitals

Vitals Weight Unit	<input type="text" value="lbs"/>	Can be overwritten for specific patient (and saved)
Vitals Height Unit	<input type="text" value="in"/>	Can be overwritten for specific patient (and saved)
Vitals Head Circumference Unit	<input type="text" value="in"/>	Can be overwritten for specific patient (and saved)
Vitals Temperature Unit	<input type="text" value="f"/>	Can be overwritten for specific patient (and saved)

## Communications

Setting	Description
Use Organization Name On Reminders and Onpatient Invites	<p>Show the organization name on reminders or OnPatient invites. Enter your practice/organization name in the <b>Organization Name</b> box.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;">  To turn this setting on, submit a support case to create an administrative role.         </div> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0; background-color: #e6f2ff;">  When this setting is turned on, the <b>Organization Name</b> box appears, and the <b>Recorded Provider Name</b> is replaced by <b>Recorded Organization Name</b>.         </div> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>Use Organization Name On Reminders and Onpatient Invites <input checked="" type="checkbox"/></p> <p>Organization Name <input type="text" value="Blue Sky Medical"/></p> <p>Recorded Organization Name <input type="button" value="Record"/></p> </div>
Recorded Provider Name	You can record your name, which is played during the voice reminder when announcing you as the provider. For example: "You have an appointment with [recorded name] on Wednesday."
Use official name on fax cover sheets	<p>Show the practice name from the <b>Medical Billing</b> tab on the fax cover sheet instead of the provider's name.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 5px 0;"> <p><b>Attention:</b></p> <p><b>Dr. James Smith</b>  <b>Fax:</b> +1 650-555-5555</p> <hr/> <p><b>Fax From:</b></p> <p><b>Family Practice</b>  <b>Phone:</b> (443) 555-5555  <b>Fax:</b> +1 (620)-555-5555  <b>Email:</b>            sample.email@drchrono.com  <b>Date:</b> 2023-06-14 11:47:29 AM</p> </div>
Include notice of confidentiality on faxes and patient emails	<p>Add a notice of confidentiality to faxes and patient emails. Enter the notice of confidentiality in the <b>Notice to include</b> box.</p> <p><a href="#">How do I add a confidentiality notice to the bottom of all outgoing faxes and emails?</a></p>

Setting	Description
<p>Enable sending non-free referral faxes</p>	<p><b>Turned on:</b> Only the <b>Fax Referral</b> option is available when sending a referral.</p>  <p><b>Turned off:</b> You can send a fax to the recipient with instructions on how to download the referral by selecting <b>Fax &gt; Send Referral (free)</b>.</p> 
<p>Include Patient Problems in referrals by default</p>	<p><b>Turned on:</b> Allows you to include patient problems in referrals by default.</p> <p><b>Turned off:</b> When sending a referral, the <b>Problems</b> checkbox is cleared.</p> 
<p>Practice Chat Notification</p>	<p>Allow practice chat notifications when receiving messages.</p>
<p>Remove "Powered by DrChrono" from Footer of Clinical Notes and Patient Statements</p>	<p>Remove "Powered by DrChrono" from clinical notes and patient statements.</p> 

Setting	Description										
<p>Allow patients to confirm or cancel appointments from appointment reminder emails</p>	<p>Allow patients to select a link to confirm or cancel appointments from appointment reminder emails.</p> <div data-bbox="660 304 1203 748" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><b>Appointment with James Smith</b></p> <p style="text-align: center;">June 14, 2023 at 2:00 p.m.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"><b>Doctor</b></td> <td>James Smith</td> </tr> <tr> <td><b>Office</b></td> <td>225 Schilling Circle Hunt Valley, MD 21031</td> </tr> <tr> <td><b>When</b></td> <td>June 14, 2023 at 2:00 p.m.</td> </tr> <tr> <td><b>Website</b></td> <td><a href="http://www.drchrono.com">http://www.drchrono.com</a></td> </tr> <tr> <td><b>Contact</b></td> <td>(443) 555-5555</td> </tr> </table> <div style="text-align: center; margin-top: 10px;"> <span style="background-color: #4CAF50; color: white; padding: 5px 15px; border-radius: 5px;">Confirm Appointment</span> <span style="background-color: #F44336; color: white; padding: 5px 15px; border-radius: 5px; margin-left: 10px;">Cancel Appointment</span> </div> </div>	<b>Doctor</b>	James Smith	<b>Office</b>	225 Schilling Circle Hunt Valley, MD 21031	<b>When</b>	June 14, 2023 at 2:00 p.m.	<b>Website</b>	<a href="http://www.drchrono.com">http://www.drchrono.com</a>	<b>Contact</b>	(443) 555-5555
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<p>Direct Messaging</p>	<p>Select <b>Set up your Direct Address</b> to set up Direct Messaging.  <a href="#">📖 Setting Up Direct Messaging</a></p>										