Manage Account Settings: General

Last modified on 07/02/2026 5:25 pm EDT

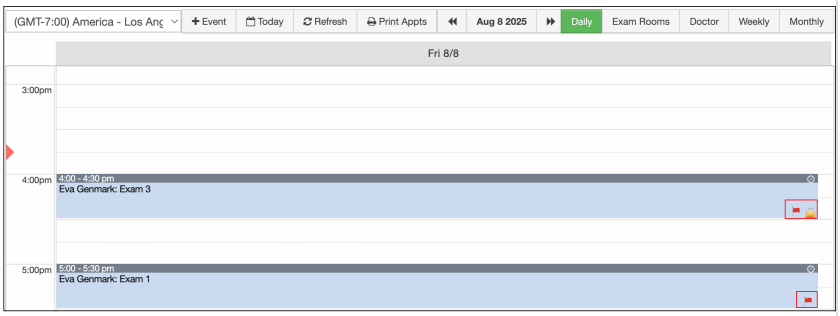
Calendar Settings | Appointment Settings | MIPS Decision Support Intervention | Clinical Notes | Patient Vitals | Communications

You can configure key areas of your DrChrono account on the **General** tab in **Account Settings**.

Go to the General tab

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

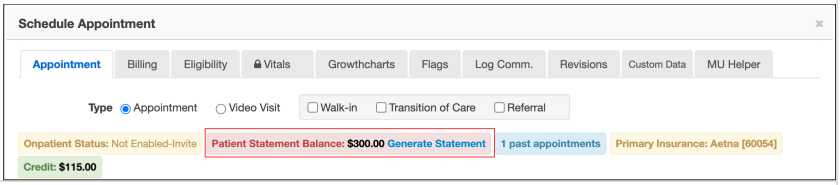
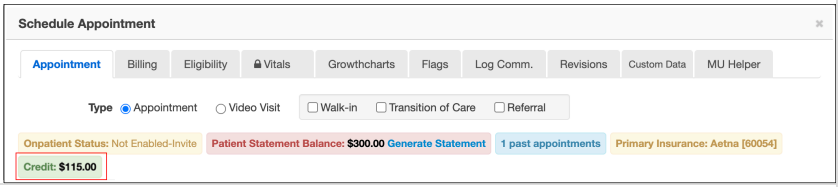
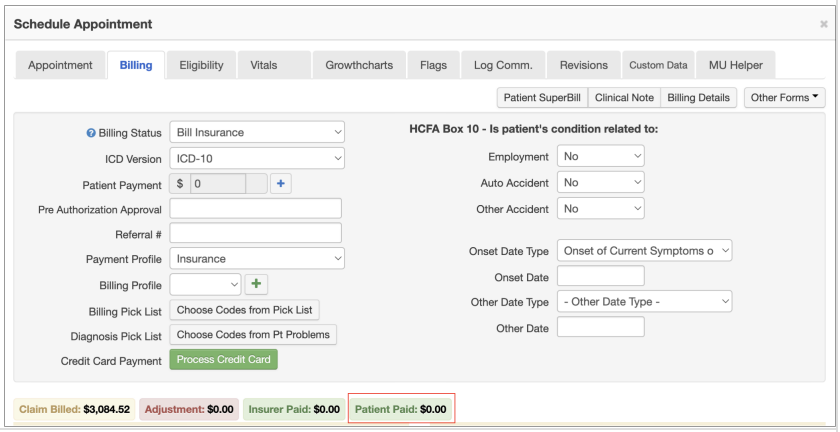
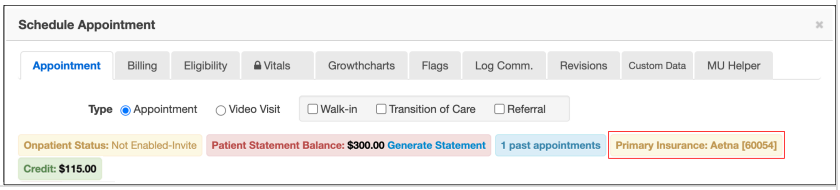
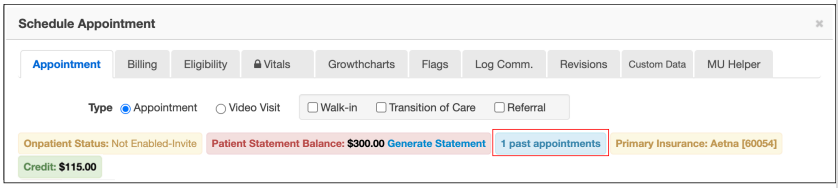
Calendar Settings

Setting	Description or Related Article
Display flag icon on appointment	Show the flag icon on **Calendar** appointments when a patient has a flag in their chart or appointment. See the image in the next row. What do the lock and flag icons on my appointments mean?
Display lock icon on appointment	Show the lock icon on the **Calendar** appointment when the clinical note is locked.  What do the lock and flag icons on my appointments mean?
Use new dashboard homescreen	Set the **Dashboard** or the **Calendar** as your default landing page. If you set the **Dashboard** as the default landing page in **Account Settings**, it's also set in **Dashboard Settings**.
Show user satisfaction survey	Opt in to receiving user satisfaction surveys.
Default Office	Set the default office in the **Calendar.** The default office determines which office location is listed in the provider's contact information on documents such as referrals and C-CDA files.

Setting	Description or Related Article
Additional Offices	Manage a provider's office associations within their practice group by adding or removing office locations. Archived offices do not appear in the dropdown. Changes are automatically reflected on the **Providers** page (under **Work Location**). **Windows users:** Press **CTRL** + select the office to select multiple offices.
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. Setting a Default Appointment Time
Date range on Appointment Template	Set a start and end date for the appointment templates on your calendar. How do I add a date range to my appointment templates?
Appointment Templates in more views	Allow appointment templates to appear in all calendar views except the monthly view. Enabling Appointment Templates in All Calendar Views
Allow Exam Room Overlaps	Allow multiple appointments to be scheduled at the same time in the same exam room, even if they overlap. How do I schedule multiple appointments in the same exam room at one time?
Global Overlap Checking	Prevent overlapping appointments to be scheduled at the same time in the same exam room. Enabling or Disabling Overlapping Appointments
Appointment Default Color	Set a default appointment color for this provider's appointments How can I change the default appointment color?
Phonetic Name	Set the pronunciation of your name for reminders. How do I change the pronunciation of my name in appointment reminders?
Hide cancelled appointments Hide rescheduled appointments	Hide canceled and rescheduled appointments from the **Calendar**. Hiding Canceled and Rescheduled Appointments from the Schedule
Duplicate appointment warning	Show a warning message when multiple appointments are scheduled for the same patient on the same day. Duplicate Appointment Warning
Enable No Show Predictor	Let the system use AI-powered insights to assign a risk score to each appointment to identify which upcoming visits are most likely to no-show. No Show Predictor

Appointment Settings

Setting	Description or Related Article
Access to online scheduling	Allow patients to schedule online through OnPatient or the scheduling widget. Enabling Online Scheduling in Your Office

Setting	Description or Related Article
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. 
Claim's Billing Information	Show the billing information for claims on the **Billing** tab of the appointment window. 
Patient's Insurance	Show flags in the appointment window for the patient's insurance. 
Patient's Flag	Show patient flags in the appointment window. Patient Flags
Appointment Count	Allows you to view the number of past appointments the patient has had as a flag in the appointment window. 
Matched DSI Rules	Turn this setting on to view flags based on Decision Support Intervention rules. CDS Rule Flags in the Appointment Window
Allow inactive deceased patient appointments	Allow creating new appointments for patients who have the **Inactive-Deceased** chart status.

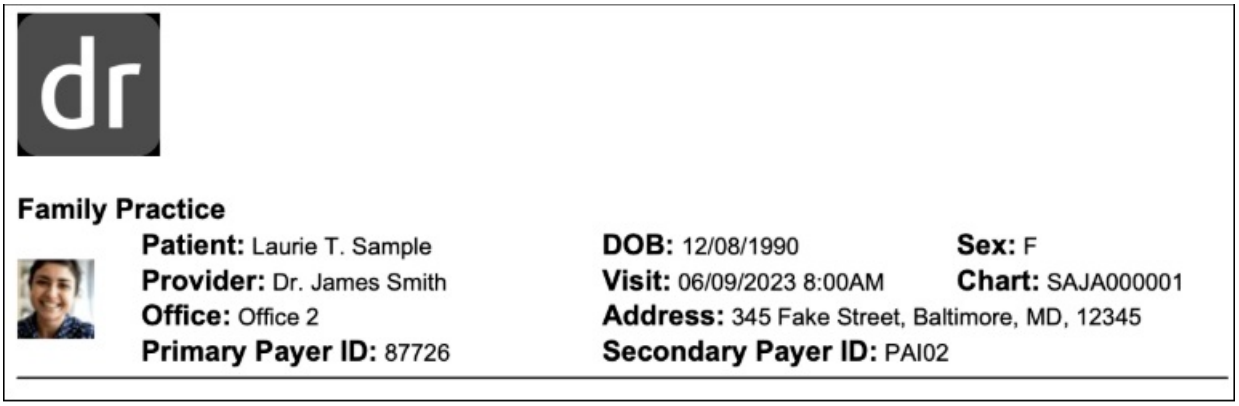
Setting	Description or Related Article
Auto Appointment Reminders	The patient's most recent reminders are automatically selected when scheduling appointments.
Limit Patient Flags to Appointment	Show only flags associated with the current appointment in the appointment window. How do I add a patient flag to an appointment?
Autorun Eligibility	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. Save Time with Auto Eligibility Checks
Gender & Identity	Hide the dropdown menus for gender and identity in the patient chart, the DrChrono OnPatient app, and the DrChrono Check-In app. Adding Gender Identity and/or Sexual Orientation to a Patient's Chart Adding Gender Identity and Sexual Orientation to the Check-In App

MIPS Decision Support Intervention

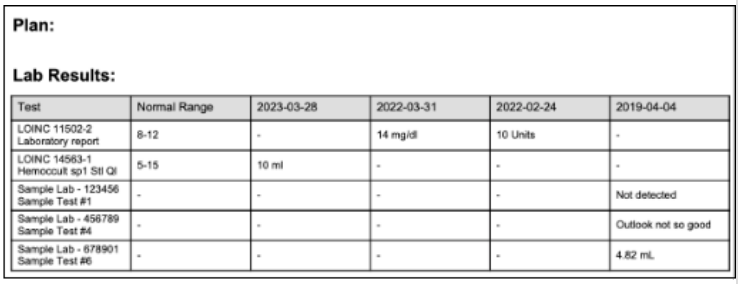
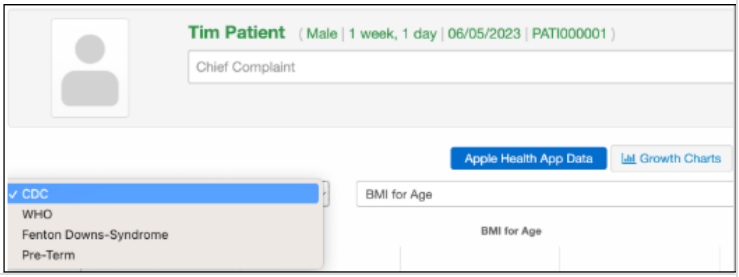
Use the **Severity Level of Interventions** setting to specify which severity levels appear for drug-to-drug and drug-to-allergy interactions.

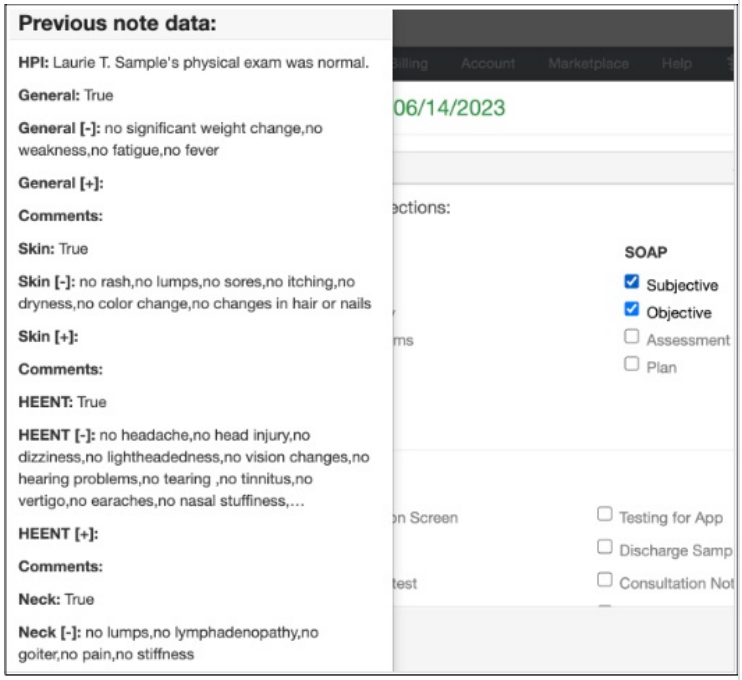
Clinical Notes

Setting	Description
Include Practice Official Name	Add the practice name from the **Medical Billing** 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 in the clinical note's header.
Include Office Information	Adds the office name and address in the clinical note's header.
Include Payer IDs	Add the patient's primary and secondary payer IDs to the clinical note's header.



Setting	Description or Related Article

Setting	Description or Related Article
Include Lab Orders and Results	Show lab orders and results in the **Plan** section of the clinical note.  **Plan:** **Lab Results:** 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 14563-1 Hemoccult sp1 Stl Ql | 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
Render H&P Physical Exam Text Before Vitals	The physical exam narrative text appears before the vitals tables in the history & physical (H&P) clinical note. Clinical Notes: Using the "Render H&P Physical Exam Text Before Vitals" Setting
Reduce Header and Footer Font Size	Reduce the clinical note's header and footer font size. Reducing the Header and Footer Size on a Clinical Note
Move Non-SOAP FreeDraws to End	Move the images used in FreeDraw fields to the end of the note. Detailed Clinical Note Formatting
Default to CDC Growth Charts	Default to the CDC's growth charts in the account.  Tim Patient (Male | 1 week, 1 day | 06/05/2023 | PATI000001) Chief Complaint Apple Health App Data Growth Charts CDC WHO Fenton Downs-Syndrome Pre-Term BMI for Age BMI for Age
Hide Medications & Allergies by Default	Hide a patient's medications and allergies from the clinical note. How do I hide medications and allergies from the clinical note?
Hide CPT & ICD on Clinical Notes by Default	Hide CPT codes and ICD-10 diagnosis codes from the clinical note. Excluding Diagnosis and Billing codes from Clinical Notes
Allow Chief Complaint to be Persistent	The patient's chief complaint (the reason for visit in the appointment window) automatically populates the **Chief Complaint** field in the clinical note and the **Reason** field in the appointment window. This information is pulled from the most recent visit.

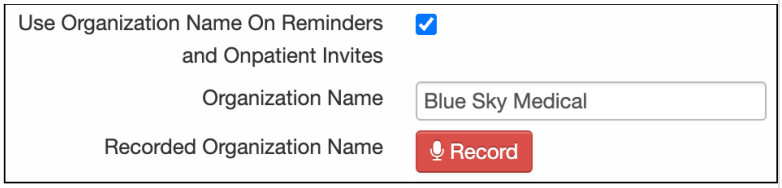
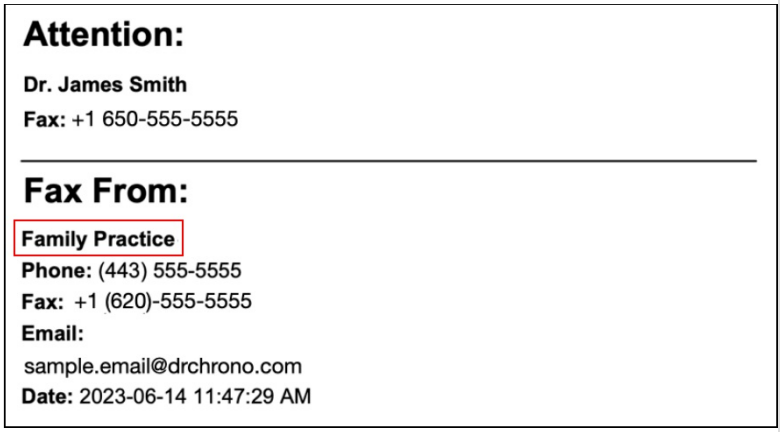
Setting	Description or Related Article
Preview Previous Note	A preview of the contents of the previous note shows when you hover over the form in the selection screen. 
Default CCDA Clinical Note Source	Select where the provider's default C-CDA note is pulled from.
Default CCDA Clinical Note Type	Select the provider's default C-CDA clinical note type.
Include Care Plan	Include care plans in the clinical note PDF. The care plan will be in a table on a new page within the PDF.

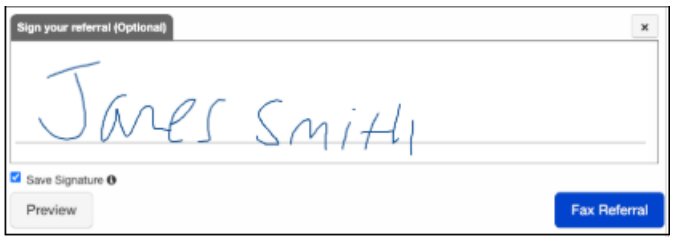
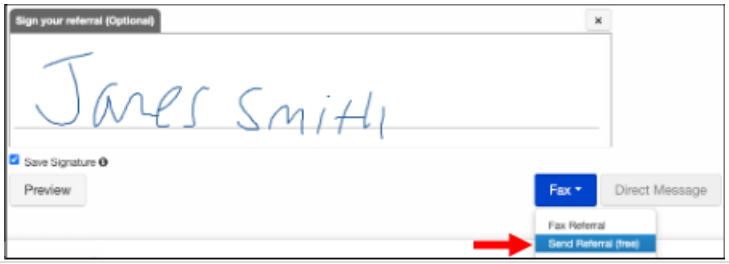
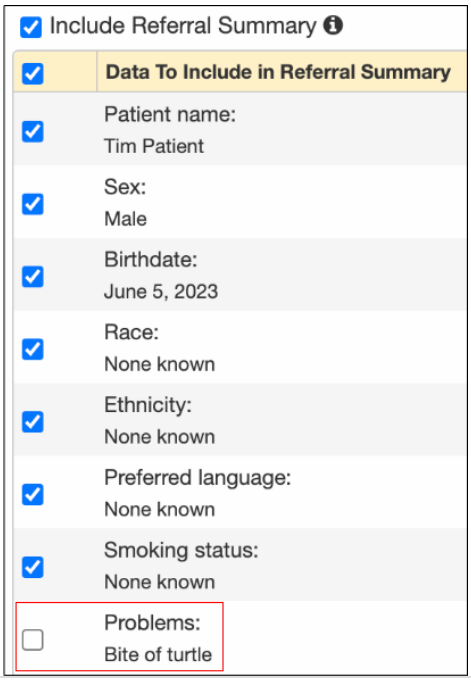
Patient Vitals

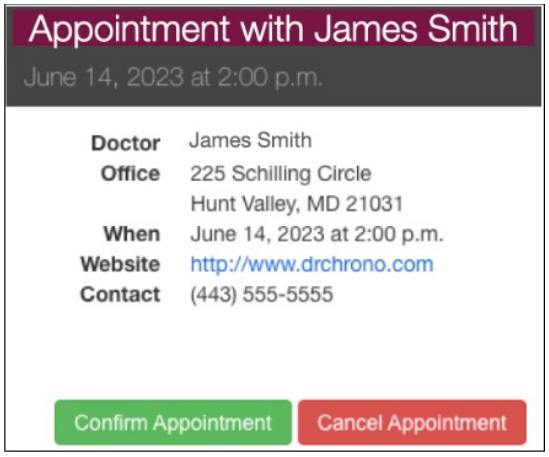
Use the **Patient Vitals** settings to choose default units—metric or customary—for weight, height, head circumference, and temperature when entering vital signs.

Communications

Setting	Description or Related Article
Reminders timezone source	Set which time zone to use for appointment reminders.

Setting	Description or Related Article
Use Organization Name On Reminders and Onpatient Invites	Show the organization name on reminders or OnPatient invites. Enter your practice/organization name in the **Organization Name** box. To turn this setting on, submit a support case to create an administrative role. When this setting is turned on, the **Organization Name** box appears, and the **Recorded Provider Name** is replaced by **Recorded Organization Name**. 
Recorded Provider Name	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	Show the practice name from the **Medical Billing** tab on the fax cover sheet instead of the provider's name. 
Include notice of confidentiality on faxes and patient emails	Add a confidentiality notice to show on the bottom of all faxes and patient emails. Enter the confidentiality notice in the **Notice to include** box.

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

Setting	Description or Related Article
Allow patients to confirm or cancel appointments from appointment reminder emails	Allow patients to select a link to confirm or cancel appointments from appointment reminder emails. 
Direct Messaging	Select **Set up your Direct Address** to set up Direct Messaging. Setting Up Direct Messaging