



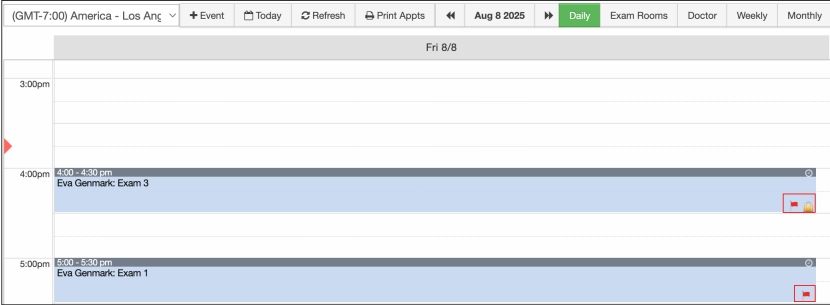
Account Settings: General

Last modified on 08/25/2025 7:52 pm EDT

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

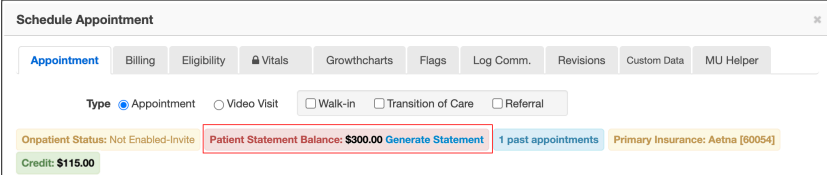
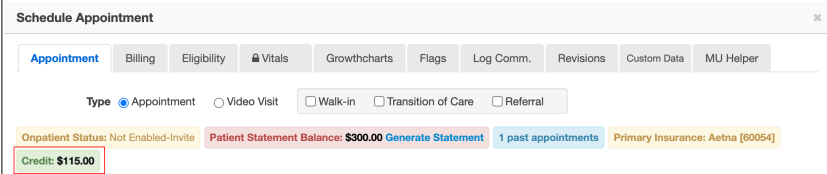
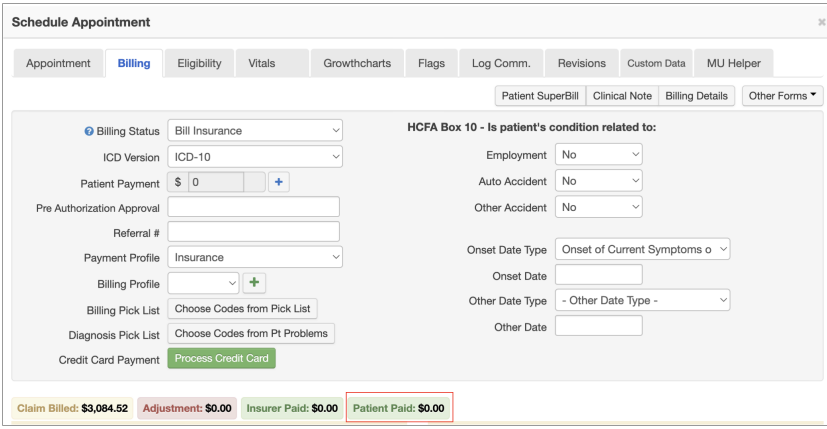
To open the **General** tab, select **Account** > **Account Settings** > **General** tab.

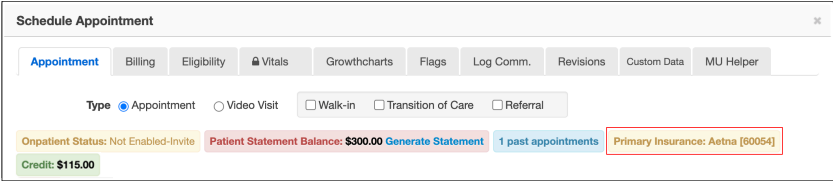
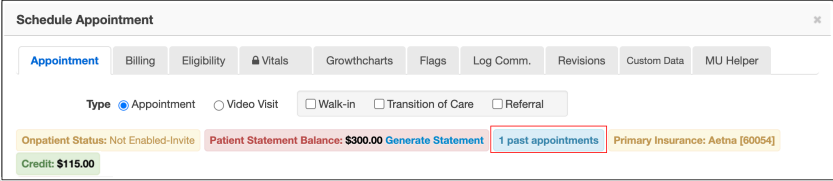
Calendar Settings

Setting	Description
Display flag icon on appointment	Show the flag  icon on Calendar appointments when a patient has a flag in their chart or appointment. Go to Patients > Patient Flags to create and edit patient flags. 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.
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 monthly. 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

Setting	Description
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

Appointment Settings

Setting	Description
Access to online scheduling	Allow patients to schedule online through OnPatient or the scheduling widget. Enabling Online Scheduling in Your Office
Patient's Statement Balance	<p>Show the patient's statement balance as a flag in the appointment window and generate a statement if needed.</p> 
Patient's Current Balance	<p>Show the patient's current balance as a flag in the appointment window.</p> 
Claim's Billing Information	<p>Show the billing information for claims on the Billing tab of the appointment window.</p> 

Setting	Description
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.</p> <p>Patient Flags</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.</p> <p>CDS Rule Flags in the Appointment Window</p>
Allow inactive deceased patient appointments	<p>Allow creating new appointments for patients who have the Inactive-Deceased 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.</p> <p>How do I add a patient flag to an appointment?</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.</p> <p>Save Time with Auto Eligibility Checks</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.</p> <p>Adding Gender Identity and/or Sexual Orientation to a Patient's Chart</p> <p>Adding Gender Identity and Sexual Orientation to the Check-In App</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 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 to the clinical note's header.
Include Office Information	Adds the office name and address to the information to the clinical note's header.

Setting	Description
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 Plan section of the clinical note.</p> <p>Plan:</p> <p>Lab Results:</p> <table><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><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 14563-1 Hemocult sp1 Stl Ql</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></table>	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 Hemocult 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
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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 & physical (H&P) clinical note.</p> <p>Clinical Notes: Using the "Render H&P Physical Exam Text Before Vitals" Setting</p>																																				
Reduce Header and Footer Font Size	<p>Reduce the clinical note's header and footer font size.</p> <p>Reducing the Header and Footer Size on a Clinical Note</p>																																				
Move Non-SOAP FreeDraws to End	<p>Move the images used in FreeDraw fields to the end of the note.</p> <p>Detailed Clinical Note Formatting</p>																																				
Default to CDC Growth Charts	<p>Default to the CDC's growth charts in the account.</p> <div><div><div><div><div></div></div><div><div>Tim Patient</div><div>(Male 1 week, 1 day 06/05/2023 PATI000001)</div></div><div><div>Chief Complaint</div></div></div></div><div><div><div><div>✓ CDC</div><div>WHO</div><div>Fenton Downs-Syndrome</div><div>Pre-Term</div></div><div>BMI for Age</div><div>BMI for Age</div></div><div><div>Apple Health App Data</div><div>Growth Charts</div></div></div></div>																																				
Hide Medications & Allergies by Default	<p>Hide a patient's medications and allergies from the clinical note.</p> <p>How do I hide medications and allergies from the clinical note?</p>																																				
Hide CPT & ICD on Clinical Notes by Default	<p>Hide CPT codes and ICD-10 diagnosis codes from the clinical note.</p> <p>Excluding Diagnosis and Billing codes from Clinical Notes</p>																																				

Setting	Description
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.
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> <div> <div> <p>Previous note data:</p> <p>HPI: Laurie T. Sample's physical exam was normal.</p> <p>General: True</p> <p>General [-]: no significant weight change,no weakness,no fatigue,no fever</p> <p>General [+]:</p> <p>Comments:</p> <p>Skin: True</p> <p>Skin [-]: no rash,no lumps,no sores,no itching,no dryness,no color change,no changes in hair or nails</p> <p>Skin [+]:</p> <p>Comments:</p> <p>HEENT: True</p> <p>HEENT [-]: no headache,no head injury,no dizziness,no lightheadedness,no vision changes,no hearing problems,no tearing ,no tinnitus,no vertigo,no earaches,no nasal stuffiness,...</p> <p>HEENT [+]:</p> <p>Comments:</p> <p>Neck: True</p> <p>Neck [-]: no lumps,no lymphadenopathy,no goiter,no pain,no stiffness</p> </div> <div> <p>06/14/2023</p> <p>Sections:</p> <p>SOAP</p> <p><input checked="" type="checkbox"/> Subjective</p> <p><input checked="" type="checkbox"/> Objective</p> <p><input type="checkbox"/> Assessment</p> <p><input type="checkbox"/> Plan</p> <p>on Screen <input type="checkbox"/> Testing for App</p> <p><input type="checkbox"/> Discharge Samp</p> <p>test <input type="checkbox"/> Consultation Not</p> </div> </div>

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.

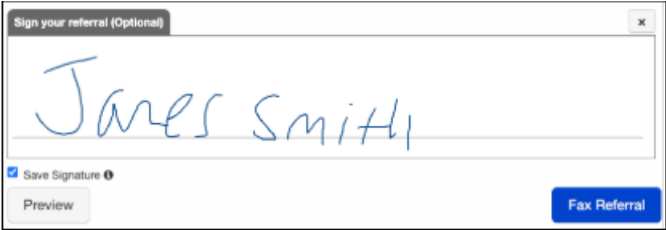

Patient Vitals

Vitals Weight Unit	lbs	Can be overwritten for specific patient (and saved)
Vitals Height Unit	in	Can be overwritten for specific patient (and saved)
Vitals Head Circumference Unit	in	Can be overwritten for specific patient (and saved)
Vitals Temperature Unit	f	Can be overwritten for specific patient (and saved)


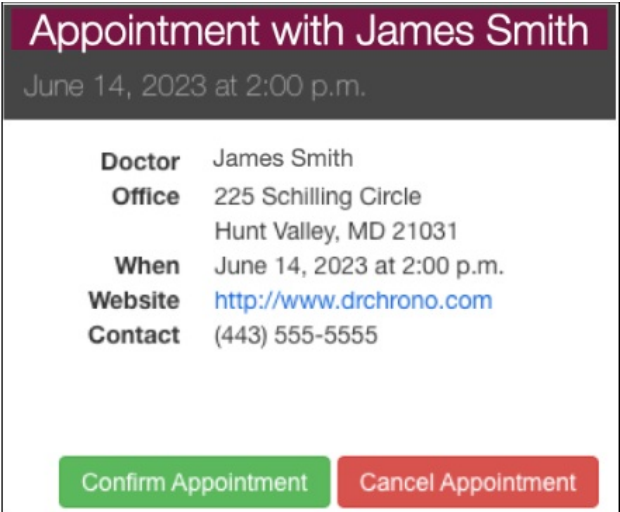
Communications

Setting	Description
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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 Organization Name box.</p> <div>  To turn this setting on, create a support case to create an administrative role. </div> <div> <p>When this setting is turned on, the Organization Name box appears and the Recorded Provider Name is replaced by Recorded Organization Name.</p> </div> <div> <div> Use Organization Name On Reminders and Onpatient Invites <input checked="" type="checkbox"/> </div> <div> Organization Name <input type="text" value="Blue Sky Medical"/> </div> <div> Recorded Organization Name <input type="button" value="Record"/> </div> </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 Medical Billing tab on the fax cover sheet instead of the provider's name.</p> <div> <p>Attention:</p> <p>Dr. James Smith Fax: +1 650-555-5555</p> <hr/> <p>Fax From:</p> <p>Family Practice Phone: (443) 555-5555 Fax: +1 (620)-555-5555 Email: sample.email@drchrono.com Date: 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 Notice to include box.</p> <p>How do I add a confidentiality notice to the bottom of all outgoing faxes and emails?</p>

Setting	Description
Enable sending non-free referral faxes	<p>Turned on: Only the Fax Referral option is available when sending a referral.</p>  <p>Turned off: You can send a fax to the recipient with instructions on how to download the referral by selecting Fax > Send Referral (free).</p> 

Setting	Description																		
Include Patient Problems in referrals by default	<p>Turned on: Allows you to include patient problems in referrals by default.</p> <p>Turned off: When sending a referral, the Problems checkbox is cleared.</p> <div><div><input checked="" type="checkbox"/> Include Referral Summary ⓘ</div><table><tr><td><input checked="" type="checkbox"/></td><td>Data To Include in Referral Summary</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Patient name: Tim Patient</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Sex: Male</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Birthdate: June 5, 2023</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Race: None known</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Ethnicity: None known</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Preferred language: None known</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Smoking status: None known</td></tr><tr><td><input type="checkbox"/></td><td>Problems: Bite of turtle</td></tr></table></div>	<input checked="" type="checkbox"/>	Data To Include in Referral Summary	<input checked="" type="checkbox"/>	Patient name: Tim Patient	<input checked="" type="checkbox"/>	Sex: Male	<input checked="" type="checkbox"/>	Birthdate: June 5, 2023	<input checked="" type="checkbox"/>	Race: None known	<input checked="" type="checkbox"/>	Ethnicity: None known	<input checked="" type="checkbox"/>	Preferred language: None known	<input checked="" type="checkbox"/>	Smoking status: None known	<input type="checkbox"/>	Problems: Bite of turtle
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Practice Chat Notification	Allow practice chat notifications when receiving messages.																		

Setting	Description
Remove "Powered by DrChrono" from Footer of Clinical Notes and Patient Statements	<p>Remove "Powered by DrChrono" from clinical notes and patient statements.</p> 
Allow patients to confirm or cancel appointments from appointment reminder emails	<p>Allow patients to select a link to confirm or cancel appointments from appointment reminder emails.</p> 
Direct Messaging	<p>Select Set up your Direct Address to set up Direct Messaging. Setting Up Direct Messaging</p>