

Practice Management

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The Practice Management page comprises three tabs—General Management, Patient Chart Settings, and Tag Management.

General Management

Manage offices, facilities, providers, staff, groups, roles, permissions, and practice dashboards from one structured workspace.

The screenshot shows the 'Practice Management' interface with the 'General Management' tab selected. On the left is a sidebar menu with options: Offices, Facilities, Providers, Staff, Groups, Roles & Permissions, and Dashboards. The main content area is titled 'Offices' and includes an 'Add Office' button. It features a filter for 'Active' (2) and 'Archived' (0). A blue information banner states: 'Before you can use our Telehealth service, please agree to our updated Terms of Service, Privacy Policy and contract addendum.' with a 'View Documents' link. Below this is a search bar labeled 'Search by office name'. A table lists two offices:

Office	Facility Code	Exam Room	Telehealth	Online Schedule	Action
West Office 123 West St, Anywhere, CA 90010 Hannah Provider +1 720-647-4948	11 - Office	4 rooms	<input checked="" type="checkbox"/>	None but visible to patients	View ...
East Office 123 East St, Anywhere, CA 90010 Hannah Provider +1 720-647-4948	11 - Office	4 rooms	<input type="checkbox"/>	None	View ...

Patient Chart Settings

Manage the settings for the patient chart header, patient chart sidebar, and C-CDA version.

Practice Management General Management **Patient Chart Settings** Tag Management

Patient Header

Patient Chart Side Navigation

CCDA Version

Patient Header

Customize patient header based on roles. Select up to 10 information to display in patient header and reorder as you need.

Default Settings

Role	Action
▼ System Default	View
▼ Practice Default	Edit

User Roles Settings [+ Role Settings](#)

Role	Action
No results	

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Tag Management

Manage clinical form and patient document tags.

Clinical Form Tag

Patient Document Tag

Tag Management [+ New Tag](#)

You can create, edit or archive tags. You can also check which forms are currently associated with a specific tag.

Current Archived

Name

Name	Form Usage	Creator	Last Modified	Action
New Patient	0 forms	Hannah Provider	08/28/2024	✎ 🗑

Showing 1 of 1 records |< < Prev Next > >|

Related resources

- [Manage Practice Settings](#)
- [Manage Practice Settings \(Video\)](#)
- [Customize the Patient Chart Header](#)
- [Customize the Patient Chart Sidebar](#)
- [Understanding C-CDA Export Data in DrChrono](#)
- [Document Tag Management](#)