Front Desk & Reception — New User Guide

Last modified on 08/17/2026 1:24 pm EDT

Everything the front desk team needs to manage scheduling, patient check-in, and day-to-day office workflows in DrChrono.

Chapter 1: Managing the Schedule

> **BEFORE YOU BEGIN:**
> If you haven't already done so, check out the New User Orientation before diving in — this covers how DrChrono works at a high-level, which will make the role-specific content in this guide much easier to follow.

FRONT DESK & RECEPTION | MANAGING THE SCHEDULE | ⏰ 20-MINUTE READ

After reading this article, you will be able to create new appointments, accurately record cancellations and no-shows, and reschedule existing appointments without losing the original appointment record.

Before You Begin

> **REQUIREMENTS**
> You'll need the **Access Scheduling** and **Appointment Provider Selection** permissions enabled for your account

---

Overview

The schedule is the starting point for every patient visit in DrChrono. Managing it well means appointments are created accurately, changes are handled without losing record history, and your providers' time is reflected correctly at all times. This article covers the three most common scheduling scenarios your front desk team will encounter: creating a new appointment, handling cancellations and no-shows, and rescheduling an existing visit.

Scheduling an Appointment

DrChrono's calendar lets you schedule appointments quickly from any view in the calendar — day, week, or provider. Before scheduling, confirm the patient's insurance is on file and the correct appointment profile is selected, as this determines which intake forms, note templates, and billing codes are attached to the visit automatically.

Handling Cancellations, No-Shows & At-Risk Appointments

Keeping the schedule full is a big part of your role, and DrChrono gives you the tools to do it. There are two things

you'll do:

1. **Reach out to patients whose appointments are likely to be missed.** DrChrono flags these for you.
2. **Correctly mark the appointments that get cancelled or missed.**

This section walks through both.

Spotting appointments likely to be missed

> **NOTE:** The No Show Predictor must be enabled per provider by a Practice Administrator or Manager — if you don't see it in your account, it hasn't been turned on yet. Reach out to your Practice Manager or an administrator to discuss using it in your practice.

This is where the **No Show Predictor** comes in. It is a widget in your Dashboard that looks at each upcoming appointment and scores how likely the patient is to miss it — low, medium, or high. That score helps you spot which patients to reach out to before their visit, so more of them show up. Every patient still gets the reminders you set when the appointment was scheduled; the risk score just tells you who needs a little extra attention.

When you see a **medium-** or **high-risk** appointment:

1. Check that the patient is receiving their automated reminders (learn how **here**).
2. Call the patient to confirm their appointment — a personal touch can be more effective than an automated reminder. Record outreach details for each appointment in the **Edit Appointment Communication** side panel of the No Show Predictor.
    a. **Connected + Confirmed:** If you are able to confirm the patient's appointment, update the appointment status to "**Confirmed**" for tracking and visibility purposes.
    b. **Connected + Can't Make Appointment:** Reschedule them (this process is covered in the next section).
    c. **Unable to Connect:** If you can't reach the patient, keep trying — an unconfirmed high-risk appointment is the one most likely to become an empty slot.

> **Want to know how it all works?**: See the **No Show Predictor Best Practices guide** to learn more about the tool and why accurate documentation keeps its predictions reliable.

Recording Cancellations and No-Shows

When a patient cancels or doesn't show up, document this in their appointment. Doing this correctly keeps your schedule accurate and helps the No Show Predictor stay accurate too. Two rules matter most:

1. Choose the appointment status that matches what actually happened — **No Show, Cancelled,** or **Rescheduled.** They can look similar on a busy day, but they mean very different things.
2. When a patient doesn't show up, set the appointment status to **No Show** (do not update to **Rescheduled**). To

get them back on the schedule, book a new appointment rather than rescheduling the missed one — rescheduling removes the visit from their no-show history and makes the No Show Predictor less accurate.

Charging a No-Show Fee: DrChrono lets you bill a no-show fee directly from the appointment. Check with your Practice Administrator to confirm your practice's policy before applying any charges.

Rescheduling Appointments

When a patient needs to move their appointment, DrChrono lets you reschedule directly from the existing appointment rather than canceling and rebuilding from scratch. This preserves any attached forms, billing profiles, and notes already associated with the visit.

Good Faith Estimates

Under the No Surprises Act, practices must provide uninsured and self-pay patients with a Good Faith Estimate of expected charges before a scheduled service. If you're scheduling an appointment for a patient without insurance on file, this is the point to flag or initiate that estimate. DrChrono's built-in tool lets you create, deliver, and manage these estimates directly from the billing workflow.

More Good Faith Estimate Resources:
Good Faith Estimate Tool Overview

Good Faith Estimate: Creating a New Estimate

Good Faith Estimate: Delivering the Estimate to Your Patient

Role-Specific Notes

Front Desk: Your primary responsibility in this workflow is scheduling and managing appointments on the calendar. Before you begin scheduling, confirm with your Practice Administrator that your schedule is fully configured — including providers, locations, and appointment types. If anything is missing from a dropdown or behaving unexpectedly, flag it to your admin before proceeding.

Practice Administrator: You are responsible for the configuration that makes scheduling work for your Front Desk team — including providers, locations, and appointment types. Verify all setup is complete before your team begins scheduling, and address any process gaps you observe at the admin level.

Next: Chapter 2 — Patient Check-In

With your schedule under control, you're ready to check patients in — guiding them through intake, verifying insurance, and collecting payment.

Helpful Resources

DrChrono Knowledge Base
What Do the Lock and Flag Icons on My Appointments Mean?
Duplicate Appointment Warning
Copay on Daily Calendar View
Daily Agenda Email
How Do I Sync My DrChrono Calendar to My Google Calendar?
Will Rescheduled Appointments Show Up on the Live Claims Feed?
How Do I Bill for a No-Show Appointment?
Using the Scheduling Widget
Applying Subscription Memberships to a Patient Account

Still Need Help?
Chat with Amelia by clicking Help at the bottom of your screen in your DrChrono account — available 24/7.

Chapter 2: Patient Check-In

FRONT DESK & RECEPTION | PATIENT CHECK-IN | ⏰ 30-MINUTE READ

After reading this article, you will be able to check in patients using the DrChrono Check-In app on an iPad, guide patients through completing intake forms and updating their personal and insurance information, and collect copay payments at the point of check-in.

Before You Begin

New customer setup: Before using this workflow for the first time, confirm with your Practice Administrator that your practice's check-in method has been defined and all hardware and portal settings are configured.

REQUIREMENTS:

1. **Permissions**: Same as Managing the Schedule. Contact your Practice Administrator if you are unable to access the check-in workflow
2. **For In-Office Check-In:** An iPad with the DrChrono Check-In app installed

3. **For Patient-Initiated Check-In:** The patient must be invited to the OnPatient portal prior to their appointment
4. **Copay and Payment Collection:** DrChrono Payments hardware must be set up and connected

Use this guide when a patient arrives for their appointment or has completed pre-visit check-in through OnPatient.

Overview

Patient check-in signals to your clinical team that a patient has arrived and the visit is active. In DrChrono, check-in can happen two ways: in-office using the DrChrono Check-In app on an iPad, or in advance when a patient completes check-in through the OnPatient portal before their appointment. Either way, check-in is also the point at which patients review and update their personal and insurance information and complete any required intake forms. This article covers both methods, as well as how to handle the status updates and copay collection that are part of the in-office check-in process.

Patient Check-In

Check-In via the OnPatient Portal

The video below covers the full OnPatient experience from the patient's perspective — beyond just the check-in experience. For a walkthrough focused specifically on the check-in workflow, check out the **OnPatient Check-In Overview**.

Check-In via the iPad Check-In app

First impressions are everything. A simple check-in experience not only helps maintain patient flow but can also influence whether patients decide to return. With DrChrono's iPad Check-In app, you can empower patients to provide their information and sign consent forms with ease, while giving front desk teams embedded tools — like checking insurance eligibility and processing payments — directly in the app.

Checking Insurance Eligibility & Managing Authorizations

Managing Patient Insurance

Accurate insurance information is the foundation of a clean claim. DrChrono manages patient insurance from the patient's chart under **Demographics > Insurances**, where you can add new coverage, update existing records, and archive plans that are no longer active.

Adding insurance requires three fields at minimum: Insurance Priority (Primary, Secondary, or Tertiary), the Payer, and the patient's Insurance ID. From there you can fill in group information, plan details, effective dates, subscriber information, and HCFA claim form defaults.

> **Note:** If a payer doesn't exist in the system and you create a new one, DrChrono will route that claim as a paper claim — even if the payer has an electronic Payer ID. Always search for an existing payer before creating a new one, and check with your Practice Administrator if you can't find a match.

Editing insurance is done from the same tab — expand the payer record and click the blue pencil icon to open the edit screen.

Archiving insurance should be done when a patient's coverage ends rather than deleting the record. Archived plans move to the patient's insurance history, keeping the account audit-ready without losing the data.

> **SUCCESS TIP:**
> Learn more about this process by visiting our How to Add, Edit, and Archive Patient Insurance article.

Real-Time Eligibility (RTE)

DrChrono's Real-Time Eligibility lets you verify a patient's active coverage and benefits without calling the payer — returning deductible status, copay amounts, out-of-pocket totals, coinsurance, and active coverage in real time.

Auto-Run Eligibility is the most efficient way to manage this at scale. Rather than running checks manually for each patient, you can configure DrChrono to run them automatically a set number of days before each scheduled appointment. When the check runs, results are visible directly in the **Eligibility tab** of the Appointment Screen — no manual lookup required.

To configure Auto-Run Eligibility, navigate to **Account > Provider Settings > General > Appointment Settings** and set the number of days prior to the appointment you want checks to run. Repeat for each provider in your practice, as needed.

Running a manual check is done from the patient's chart under **Demographics > Insurances**. Click the dual cards icon on the payer record, select the benefit type you want returned, and press **Run Check**.

Viewing eligibility history — every check run for a patient is stored and accessible via the clock icon on the same screen. Filter by appointment date or date range and click **View** on any row to see the full benefit details for that check.

Eligibility Profiles let you group patients or service types and run batch checks rather than one at a time — useful as a backup for any patients Auto-Run may have missed.

> **NOTE:**
> RTE requires complete insurance information (Payer ID and patient Insurance ID) in the patient's chart in order to process.

Authorizations

If a patient's plan requires prior authorization for certain services, DrChrono lets you track authorization numbers directly on the appointment. This keeps the auth tied to the claim so it flows through correctly on submission.

Enter an Authorization Number
Entering a Pending Pre-Authorization Number
Prior Authorization Alerts

Collecting Payments

Collecting payments upfront is a critical step in maximizing cash flow and keeping your practice's operations running smoothly. This guide walks through how to process payments directly in DrChrono.

Collecting Payments via Text-to-Pay

As an alternative to paying with a card, you can send patients a text-to-pay link so they can pay directly from their mobile device. Below is a walkthrough of how to use this feature.

Role-Specific Notes

Front Desk: Your responsibility in this workflow is execution — greeting the patient, initiating or confirming check-in, handing off the iPad for intake form completion and information updates, and collecting copay at the point of check-in. If anything is missing or not functioning as expected, flag it to your Practice Administrator before proceeding.

Practice Administrator: Your responsibility is initial setup and oversight. Before your team begins using check-in, ensure the practice is registered for DrChrono Payments, your preferred check-in method is configured, intake forms are created, and payment hardware is in place. Once live, you are accountable for the accuracy and consistency of your front desk's check-in process.

You're Ready to Welcome Patients!

Great job! You've completed the Front Desk & Reception learning path.

The front desk is often a patient's first impression of the practice, and you now have the skills to confidently manage scheduling, check-ins, registration, and other daily workflows in DrChrono.

Don't worry about memorizing everything—most users become even more comfortable after just a few days of using the system.

What's next?

- Practice the workflows you'll use most often, but always remember to use a test patient.
- **Take advantage of our AI-powered Chat Assistant**, available 24/7, whenever you have a question. Whether you're looking for everyday best practices, step-by-step guidance, or help finding a feature, it's a fast and easy way to get answers on the spot.

- Bookmark the Knowledge Base for quick refreshers whenever you need them.
- Ask your Practice Administrator or trainer if you need additional support.
- Check out the Front Desk & Reception Troubleshooting Guide for how to overcome common challenges in your role

You're ready to help create a smooth experience for every patient who walks through the door!

Helpful Resources

How to Add, Edit, and Archive Patient Insurance
Copay on Daily Calendar View
Patient Receipts and Superbills
Insurance Plan Types Explained
Real-Time Eligibility Dashboard
Save Time with Auto Eligibility Checks
Creating an Eligibility Profile
Prior Authorization Alerts

Troubleshooting Common Issues

Scheduling

Q: What do the lock and flag icons on my appointments mean?

A: Lock icons indicate a note has been locked by the provider. Flag icons signal a CDS (Clinical Decision Support) rule has been triggered for that appointment. If you see either and are unsure what to do, flag it to your Practice Administrator. See: What do the lock and flag icons on my appointments mean?

Q: DrChrono is warning me about a duplicate appointment — what does that mean?

A: DrChrono will alert you if a patient already has an appointment scheduled in a close time window. Review the existing appointment before confirming a new one to avoid double-booking. See: Duplicate Appointment Warning

---

Q: How do I set a default appointment length?

A: This is a Practice Administrator setting under Account Settings. If your default appointment time doesn't match your practice's workflow, ask your admin to adjust it. See: Setting a Default Appointment Time

---

Patient Check-In

Q: What should I verify at check-in before the patient sees the provider?

A: At a minimum, confirm the patient's personal and contact information, verify their insurance is current and accurate, collect any applicable co-pay, and ensure intake forms have been completed. See: Patient Check-In

---

Q: How do I run a real-time eligibility check on a patient's insurance?

A: From the patient's Insurance and Eligibility screen, you can request an eligibility check to verify active coverage

before the visit. DrChrono can also be configured to run these automatically. See: Requesting an Eligibility Check

---

Q: How do I update a patient's insurance information at check-in?

A: Open the patient's chart, navigate to the Insurance and Eligibility screen, and edit or add the insurance details as needed. Archive old insurance rather than overwriting it to preserve history. See: How to Add, Edit, and Archive Patient Insurance

---

Q: How do I collect a copay using DrChrono Payments?

A: You can process a patient payment directly from the appointment window or from the Patient Payment screen using the connected DrChrono Payments hardware. See: Processing a Patient Payment on the iPad | Processing a Patient Payment on the Web

---

Q: A patient's card was declined — what do I do?

A: Ask the patient for an alternative payment method. Do not attempt to rerun the same card multiple times. If the issue persists, refer to the decline code displayed and escalate to your Practice Administrator if needed. See: Stripe Common Decline Codes

---

Q: How do I void or refund a payment I processed by mistake?

A: From the Patient Payment screen, locate the transaction and select the void or refund option. Voids apply to same-day transactions; refunds apply to prior-day transactions. Escalate to your Practice Administrator if you are unsure. See: Voiding or Refunding a Patient Payment

---

Patient Search & Records

Q: How do I look up a patient in DrChrono?

A: Use the patient search bar at the top of the screen on both web and iPad. You can search by name, date of birth, or chart number. See: How to Search for a Patient

---

Q: How do I add a billing note to an appointment?

A: Open the appointment window and look for the billing notes field. This is useful for flagging anything the billing team needs to be aware of for that visit. See: How to Add a Billing Note to an Appointment

---

Account & Access

Q: Why does DrChrono keep logging me out?

A: DrChrono has a session timeout feature for security. Your Practice Administrator can adjust the timeout length under Account Settings if it is interrupting your workflow. See: Why Does My Account Log Me Out Frequently?

Q: I forgot my password — how do I reset it?

A: Use the password reset link on the DrChrono login screen. If you are unable to reset it yourself, your Practice Administrator can reset it for you. See: Reset Your Forgotten DrChrono Password

---

Q: How do I log in on the iPad?

A: Open the DrChrono app and enter your credentials. If your practice uses a PIN for app access, you'll be prompted after the initial login. See: Logging into DrChrono Web and iPad

Still Need Help?
Chat with Amelia by clicking Help at the bottom of your screen in your DrChrono account — available 24/7.