Practice Administrator — New User Guide

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Are you responsible for configuring your practice's DrChrono account? This is the go-to resource for setting up DrChrono.

Step 1: Applying Quick-Start Configurations

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.

PRACTICE ADMINISTRATION | QUICK-START CONFIGURATIONS | ⏰ 5-MINUTE READ

Don't Build From Scratch

Configuring a new EHR takes time — but a lot of that groundwork has already been done for you. This page collects pre-built configurations across the most common setup areas: front desk workflows, clinical documentation, and billing automation.

Each section explains what the configuration does, why it matters, and how to apply it to your account. Use what fits your practice, customize what doesn't, and skip what you don't need.

These configurations are designed to be starting points, not finished products. Review everything before using and adjust to match your practice's workflows and documentation standards.

Before You Start

To apply configurations from this page, you'll need the following permissions. If you don't have them, contact your Practice Administrator.

Configuration Area	Permission(s) Required
Reminder Profiles, Billing Profiles & Appointment Profiles	Settings
Intake Forms, Clinical Forms & Macros	Access Clinical Notes, Customize Clinical Note Format, Manage Templates, Manage Form Tags, Manage Form Packets

IMPORTANT:

1. Applied profiles, forms and other objects may be shared across your practice group and, as a result, could cause these objects to change order or be overwritten.
2. Applying any of these objects multiple times will result in duplicates, including if copied by multiple users (including providers) in the practice group when these objects are shared (or will be shared in the future).

3. Applied objects cannot be rolled back — they can only be archived individually.

Front Desk & Reception

Reminder Profiles

Reminder profiles control the automated messages sent to patients before their appointments — by SMS, email, or phone. A well-configured reminder profile reduces no-shows without any manual follow-up from your front desk.

The set of profiles below cover common reminder sequences including follow-up recalls and a standard reminder series. You can apply them as-is or use them as a baseline to adjust timing, message content, and delivery channel.

Reminder Profiles Set

Appointment Profiles

Appointment profiles define the default settings for each appointment type — duration, intake forms, clinical note templates, and billing codes — so your staff isn't making those decisions at the time of scheduling. The following set covers the most common visit types:

- New Patient
- New Issue Visit
- Annual Physical
- Follow-Up
- Procedure
- Injection
- Vaccination
- Phone Call
- Sports Physical / School Clearance

Appointment Profiles Set

Intake Forms

Intake forms are the patient-facing forms completed at check-in through DrChrono's OnPatient portal or iPad Check-in app in the office. Having the right intake forms loaded in from day one saves time collecting details during the visit. Here are some pre-built forms you can use to replace the default check-in ("onpatient") forms in your account:

General Intake
Medicare Annual Wellness Visit (AWV) Intake

Note: These will initially load into your account as custom forms. To make them load in as intake forms, open each form in Clinical Form Management, click the gear icon next to the form name, hover over Set as Workflow Form, and select the corresponding workflow form you are replacing.

We recommend:

General Intake ➔ "onpatient Reason for Visit"

Medicare Annual Wellness Visit (AWV) Intake ➡ "onpatient Additional Info"

Clinical Forms and Features

Clinical Forms

IMPORTANT: Any H&P or SOAP workflow forms that are replaced by a new form will result in any 'Copy Previous Note' or 'Persistent Form' data associated with the original forms to be unusable in any clinical notes after this change has been made.

Clinical forms determine the structure of the documentation your providers complete during or after an encounter. DrChrono includes a standard set of H&P and SOAP forms out of the box, but most practices benefit from having specialty-specific or visit-specific forms available from the start.

Workflow Forms (H&P and SOAP):

General H&P Set
General SOAP Set

NOTE: These will initially load into your account as custom forms. To make them appear in the H&P and SOAP tabs of the clinical note, open each form in **Clinical Form Management**, click the gear icon next to the form name, hover over **Set as Workflow Form**, and select the corresponding workflow form you are replacing.

Issue-based SOAP & Procedure Notes

SOAP Notes by Issue Set (designed for common Primary Care and Urgent Care use cases)
Procedure Note: IUD
Procedure Note: Suture Removal
Procedure Note: Injection
Sports Physical/School Clearance

Screening Forms & Questionnaires

PHQ-9 (Depression Screening)

Other Forms

Work/School Excuse Note (**Recommendation:** Apply "Exclude from Complete Note" rule to this form in Clinical Form Management)
Phone Call Note

NOTE: Several of these forms have Billing Profiles tied to specific fields, which auto-apply ICD-10 and CPT codes to the note and claim when activated inside the clinical note. To remove these, use Clinical Form Management to remove the billing profile from these fields (these will be Switch fields located in the Assessment and Plan sections).

Macros

Macros are pre-built blocks of text that providers or clinical staff user can insert into a clinical note with a single click. They're commonly used for charting by exception, standard care instructions, or frequently used phrases — anything clinical users apply to their notes repeatedly throughout the day. The below set includes a normal Physical Exam, normal Review of Systems, a treatment plan header, a Plan summary, a list of standard Annual Physical labs, and more.

Macro Buttons Set

Ready for Billing Review Status

The **Ready for Billing Review** status is an automation you can configure for each provider so that when the note is signed and locked, it automatically updates the Billing Status for the visit, which can be filtered by billing team members inside the Live Claims Feed.

Ready for Billing Review

More on how to configure this in Account Settings here.

Using Forms from the Form Library

The Form Library is a community-driven collection of clinical forms shared by other practices using DrChrono. You can browse the library and copy forms directly into your account as a starting point.

IMPORTANT: The Library is not moderated by DrChrono by EverHealth. Forms are contributed by other practices and have not been vetted for clinical accuracy, compliance, structural integrity, or specialty fit. **Review and test all templates before use.**

SUCCESS TIP:
All of these profiles and forms are copies for your practice to keep- you can edit or archive any of these as you see fit. We recommend duplicating the original and retain it until your build is complete — then archive it when you're done.

What's Next

Once you've applied the configurations that fit your practice:

1. **Test before you go live** — schedule an appointment with a test patient and walk through the full workflows throughly before live use
2. **Train your team** — share the relevant sections of this guide with front desk staff, providers, and your billing team
3. **Revisit and refine** — most practices adjust templates and profiles in the first few weeks; that is expected

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Suggested next: Step 2 — Creating User Accounts, Roles and Permissions

With your configurations in place, the next logical step is getting the rest of your team into the system — setting up staff accounts and making sure everyone has the right level of access.

Helpful Resources

Managing and Editing Clinical Forms
Managing and Editing Macro Buttons
Complete Note Format and Form Reorder
Using the Form Library

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

Step 2: Creating User Accounts, Roles and Permissions

PRACTICE ADMINISTRATION | CREATING & MANAGING USER ACCOUNTS | ⏰ 10-MINUTE READ

After reading this article, you will be able to distinguish between provider and staff account types, understand how roles and permissions work in DrChrono, and create and manage user accounts for your practice.

Before You Begin

> **REQUIREMENTS**
> You'll need the **Manage Permissions** and **Manage Accounts** permissions enabled for your account
> **Have the following ready for each staff user:** Full name, email address, role, and preferred username

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Overview

DrChrono uses two types of user accounts — providers and staff — each with different levels of access and clinical responsibility. Before your team can log in and begin working, each person needs their own account with the appropriate role and permissions assigned. This article walks you through the difference between account types, how roles and permissions work, and how to create staff accounts in DrChrono.

Provider Accounts vs. Staff Member Accounts

Provider accounts are for clinicians who deliver and document patient care. Providers have their own schedule in DrChrono, can sign and lock clinical notes, and must be added through the provider management workflow — not as staff accounts — to ensure their schedule and billing credentials are correctly configured.

Staff Member accounts are for everyone else — front desk, clinical support staff, billing staff, and even practice administrators. Staff accounts are created by the Practice Administrator and can be configured with varying levels of access depending on the role.

IMPORTANT:
Do not create a staff account for providers. More info about adding or replacing providers can be found here.

Managing Permissions and Roles

Roles define what each staff member can see and do in DrChrono. Rather than setting permissions individually for every user, the Roles feature lets you create and apply standardized access to users based on the nature of their work — so a front desk user sees scheduling tools while a biller sees the Live Claims Feed. Getting roles right before creating accounts saves rework and keeps staff out of areas they shouldn't access.

SUCCESS TIP:
The **Share Patients** and **Provider Dropdown** permissions are disabled by default and are critical permissions needed for users or roles that require access to all patients and providers in the practice, respectively.

Creating Staff Members

Staff accounts are created by the Practice Administrator in Practice Settings and assigned a role that controls their level of access. Each staff member receives their own login credentials, and accounts can be scoped to a specific provider or office location if needed.

Suggested next: Step 3 — Setting Up DrChrono Payments

With your team's accounts in place, you're ready to get your practice set up to collect patient payments directly within DrChrono.

Helpful Resources

Staff Accounts

- Create Staff Accounts
- Edit Staff
- Deactivate Staff
- Reset Staff Passwords
- Restrict Staff to an Office
- Change the Primary Provider for Staff

Roles & Permissions

- Account Permissions Overview
- System and Custom Roles
- Create Custom Roles
- Edit Custom Roles
- Edit Provider and Staff Permissions
- Edit Provider and Staff Roles

Providers

- Manage the Provider List
- Add Providers
- Remove or Replace Providers

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

Step 3: Setting up DrChrono Payments

PRACTICE ADMINISTRATION | SETTING UP DRCHRONO PAYMENTS | ⏰ 10-MINUTE READ

After reading this article, you will be able to register your practice for DrChrono Payments, configure your payment settings, and set up your payment hardware so your team can begin collecting patient payments directly within DrChrono.

Before You Begin

REQUIREMENTS
You'll need the **Access Patient Payments**, **Settings, Account Settings** and **Billing Administrator** permissions for your account

Have the following ready: Your practice's business information and bank account details for payment deposits

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Overview

DrChrono Payments is our recommended payment solution for a reason — it's built directly into your workflow rather than sitting alongside it. When payments are integrated into your EHR, your staff can see what a patient owes and collect payment in one place, transactions post to the correct patient account without manual entry, and all payment activity is visible across providers and locations without piecing together data from two systems. There's no end-of-day reconciliation, no margin for posting errors, and less confusion for your front desk and back office teams.

For your patients, the difference is also noticeable — check-in moves faster, receipts are issued on the spot, and the experience feels cohesive rather than pieced together. If you're currently using an external processor, we'd encourage you to make the switch before go-live — your team will feel the difference from day one.

Payment Collection Methods

DrChrono offers practices several methods for collecting patient payments. You have the choice to enable the ones that meet your practice's needs.

In-Person (Swipe, Tap, Manual Entry): Collect payments at the front desk using the M2 card reader paired with your iPad. Supports both swipe and contactless tap payments, with the transaction posting automatically to the patient's account upon completion.

Text-to-Pay: Send patients a secure payment link via text message directly from DrChrono. Patients complete payment on their own device at their convenience — useful for collecting balances after a visit without requiring a follow-up call.

OnPatient Portal: Patients can pay outstanding balances through their OnPatient portal at any time. Requires OnPatient to be enabled and the patient to have an active portal account.

Enrolling in DrChrono Payments

Before your team can collect payments, your practice needs to complete the registration process through DrChrono. This involves verifying your business identity and connecting a bank account for payment deposits.

Note: Registration is processed through Stripe, DrChrono's payment processing partner. Have your business information and bank account details ready before starting — you will not be able to save and return to complete the form later.

Configuring Payments Settings

Once registered, configure how payments are handled across your practice — including payment types, receipt settings, and how payments surface during the check-in and billing workflows.

1. Enroll with DrChrono Payments (skip this step if already completed)
2. Add Additional Merchant IDs (only needed if keeping separate accounts for providers or offices)
3. Configure Patient Payment Settings for each Provider (**Note:** The Require Balance setting must be unchecked if you plan on collecting payments before charges have been entered on the visit)
4. Configure Patient Receipt Options
5. Set up DrChrono Payments for OnPatient Portal (only use if planning to allow patients to pay via OnPatient)
6. Configure Available Payment Types

SUCCESS TIP: DrChrono Payments MUST be selected as a payment method in order to use it. It is also not necessary to select any other payment processors (e.g. Mastercard, Visa, etc.) as all of these

will be processed through DrChrono Payments. Our suggested Payment Methods for typical practices are:

- **Cash**
- **Check**
- **DrChrono Payments**

Setting Up Payment Hardware

DrChrono Payments has card readers available for in-person payment collection. This section covers setting up the reader with your iPad and confirming it's ready for use at the front desk.

1. Purchase Card Readers from our Store
2. Setting up the M2 Card Reader

Suggested next: Step 4 — Managing Billing Settings

Now that payments are configured, it's a good time to set up the billing foundation — payer enrollments, your fee schedule, and billing account settings — before your practice submits its first claim.

Helpful Resources

Processing Payments

- Processing a Patient Payment on the Web
- Processing a Patient Payment on the iPad
- Using Patient Text-to-Pay
- Saving Credit Card Information Without Processing a Payment
- Voiding or Refunding a Patient Payment
- Managing Patient Subscriptions

Reporting

- Stripe Dashboard
- Stripe Reporting
- Stripe Funding Time

Troubleshooting

- Resolving Error Messages
- Stripe Common Decline Codes
- Stripe Refunds and Reversals

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

Step 4: Managing Billing Settings

PRACTICE ADMINISTRATION | MANAGING BILLING SETTINGS | ⏰ 15-MINUTE READ

After reading this article, you will be able to initiate payer enrollments, upload your practice's fee schedule, and configure your medical billing account settings in DrChrono.

Before You Begin

Who completes this: Practice Administrator or billing team, depending on how your practice divides administrative and billing responsibilities.

When to complete this: Billing settings should be configured before your practice submits its first claim. Payer enrollments in particular has processing time associated with it — initiate it as early as possible.

REQUIREMENTS
You'll need the ePS Enrollment (Edit), Access Billing, Settings, Account Settings, and Billing Administrator permissions enabled for your account

HAVE THE FOLLOWING READY:

- List of insurance payers to which your practice bills claims with the NPI(s) and Tax ID(s) credentialed for each
- Your fee schedule in .xlsx or .csv format

Overview

Billing settings in DrChrono establish the foundation for how your practice submits claims and gets paid. This includes enrolling with insurance payers for electronic claim submission, uploading your fee schedule so charges populate correctly, and configuring your medical billing account settings. Some of these steps have external dependencies — payer enrollment in particular requires approval from the clearinghouse — so the earlier you start, the better.

Initiating Payer Enrollments

Payer enrollment is the process of registering your practice with each insurance payer to submit claims electronically. DrChrono uses eProvider Solutions (ePS) as its clearinghouse. Enrollment is initiated through DrChrono but processed externally, and approval timelines vary by payer.

Why this matters:
You cannot submit electronic claims to certain payers or receive ERAs from any payer until the enrollment with that payer is approved. If you're new to DrChrono, start enrollment on day one — not once you're ready to bill.

ERA Enrollment Timing: When a payer approves an ERA enrollment, all ERAs will be remitted to DrChrono going forward. Since DrChrono cannot export 835 files, do not complete ERA enrollments until 1–2 weeks before go-live to avoid reconciliation issues.

For Medicare and Medicaid Enrollments:

1. **Provider Transaction Access Number (PTAN)** or **Unique Provider ID (UPI)** must be entered when starting enrollments for Medicare and Medicaid.
2. The Payer ID "**MCELG**" must be enrolled in order to check eligibility for Medicare .

Submitting Your Fee Schedule

Your fee schedule indicates what your practice charges for each procedure code. Rather than entering rates manually for each code, DrChrono can upload your fee schedule as a spreadsheet so charges populate automatically when procedures are added to an appointment. Before uploading, ensure the columns in your spreadsheet match the fields in the Fee Schedule table — an incorrectly formatted file will result in import errors.

Configuring Medical Billing Account Settings

The preferences in the Medical Billing tab of Account Settings controls the default behaviors that apply across all claims for each provider's appointments — including whether codes are auto-copied in from a previous visit or the patient's chart, how provider and practice information appears on claims, how payments are posted, automating write-off rules, and more. Most of these settings are configured once and rarely revisited, but getting them right before your first claim submission is important. Errors at the settings level can affect every claim that follows.

Suggested next: Step 5 — Managing Offices

Next, set up the office locations where your practice delivers care — every scheduled appointment needs to be tied to one.

Helpful Resources

Payer Enrollment

- eProvider Solutions — How Do I Submit an Enrollment Request?
- eProvider Solutions — What Do the Different Statuses Mean?
- eProvider Solutions — How Do I Access the Portal?
- If I Have Submitted My EDI and/or ERA Paperwork, Can I Bill Claims Right Away?

- How Long Until I Am Approved to Submit Claims?

Fee Schedules

- Fee Schedule Overview
- How to Add a New Fee Schedule
- How to Inactivate an Entire Fee Schedule
- Editing an Existing Fee Schedule
- Setting up the Billing Picklist
- Creating Billing Profiles

Billing Settings

- Adding a Payer or Updating the Payer Address in DrChrono
- Entering an Additional NPI Number and Tax ID for Billing Purposes
- Setting up Claims Rules by Payer in Insurance Setup screen
- Optimizing Insurance Search Field with Search Enrolled Payers First
- Editing Billing Settings for Offices

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

Step 5: Managing Offices

PRACTICE ADMINISTRATION | MANAGING OFFICES | ⏰10-MINUTE READ

After reading this article, you will be able to create new office locations in DrChrono, configure their basic information and work schedules, and manage the offices you have set up in your account.

Before You Begin

REQUIREMENTS
You'll need the **Settings** and **Office Settings** permissions enabled for your account

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Overview

What an office record is in DrChrono, why it matters, and how it connects to scheduling, billing, and staff access.

What is an Office?

An office in DrChrono is a record for each location where your practice delivers care — whether that's a physical clinic, a telehealth visit, or an outside location like a hospital, skilled nursing facility, or ambulatory surgery center. Every appointment is tied to an office, so each location needs its own record before your team can begin scheduling.

Each office stores its own name, address, hours of operation, and—if your practice submits claims through DrChrono—the office also holds the billing credentials (NPI and Tax ID) for that location, if unique. This ensures claims are submitted with the correct information for wherever your providers are seeing patients.

Creating and Configuring an Office

In practical terms, an office record controls the following:

- **Basic information** — the name, address, phone number, and time zone that appears on patient-facing documents and claims
- **Work schedule** — the days and hours during which appointments can be scheduled at that location
- **Billing information** — the NPI, tax ID, and payer-specific details associated with that location for claim submission (the NPI and Tax ID pulls from the provider's profile by default but can be overridden by office if the credentials are unique per location)
- **Online schedule** — whether patients can self-schedule at that location and how that scheduling widget is configured
- **Exam rooms** — the physical rooms available for scheduling at that location
- **Staff access** — which staff members are restricted to or associated with that location

If your practice operates out of a single location, you will have one office. If you have multiple locations, each should have its own office record — they should never be combined into one, as doing so will cause scheduling, reporting, and billing to reflect inaccurately.

> **SUCCESS TIP:**
> Only add billing information to an Office if the credentials are specific to that location. Some common examples include:
>
> - Each office location has a unique group NPI or TIN on file with payers
> - Providers see patients at a facility and that facility's address needs to populate Box 32 / Loop 2310C on the claim

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Suggested next: Step 6 — Creating Profiles and Managing Practice Settings

With your offices in place, you're ready to set up appointment, billing, and reminder profiles — the settings that control how appointments are categorized, charged, and communicated to patients.

Helpful Resources

The following DrChrono knowledge base articles cover offices and related configuration in more detail:

Offices

- Create Offices
- Edit Basic Office Information
- Edit the Office Work Schedule
- Edit the Office Billing Information

- Set Up the Office Online Schedule
- Archive Offices

Facilities

- Create Facilities
- Edit Facilities
- Archive Facilities

Related

- Office Setup and Management
- Restrict Staff to an Office
- Where Can I Find My DrChrono Office ID?
- I'm Moving My Office Location — What Do I Need to Do?

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

Step 6: Creating Profiles and Managing Practice Settings

PRACTICE ADMINISTRATION | CREATING & MANAGING PRACTICE SETTINGS | ⏰ 15-MINUTE READ

After reading this article, you will be able to create appointment, billing, and reminder profiles, and configure calendar and appointment settings for the providers in your practice.

Before You Begin

REQUIREMENTS
You'll need the **Manage Permissions** and **Manage Accounts** permissions enabled for your account
Have the following ready for each staff user: Full name, email address, role, and preferred username

When to complete this: Create profiles and adjust settings before your team begins using DrChrono. Profiles are applied directly to appointments, so it is recommended that they are created before your schedule is fully operational.

Overview

Profiles in DrChrono control how appointments are categorized, how charges are generated, and how patients are reminded about upcoming visits. Getting these right before go-live ensures your team isn't making manual corrections on individual appointments and that your billing starts clean from day one. This article covers the four key areas of profile and settings configuration: appointment profiles, billing profiles, reminder profiles, and

calendar and appointment settings.

Setting up your Profiles

> **Already applied the Quick-Start Configurations?**
> If you imported the appointment, billing, and reminder profiles from the Quick-Start Configurations guide and don't need to add any additional profiles, you can skip this section.

Appointment Profiles

Appointment Profiles define the types of visits being scheduled — such as a new patient visit, follow-up, procedure, etc. On the calendar, they control the color and duration of the visit on your calendar. You can apply specific consent forms that patients will sign at check-in for the visit type. If the billing codes are static for this visit type, you can even associate a billing profiles with each appointment profile to default certain code(s) to the visit immediately upon applying the appointment profile to the appointment.

Billing Profiles

Billing Profiles define the default procedure codes, diagnosis codes, and fee schedule associated with a specific appointment type. When connected to an appointment profile, charges populate automatically when an appointment is created — reducing manual entry and the risk of missed charges.

> **SUCCESS TIP:**
> Billing Profiles can be connected to Appointment Profiles so codes are applied automatically at the time of scheduling. This is ideal for visits with predictable codes. They can always be overridden at the claim level. Learn how to set this up **here.**

Reminder Profiles

Reminder Profiles control how and when patients are notified about upcoming appointments, including the timing, delivery method (email, SMS, or phone call), and message content for each reminder your practice sends. Your account comes with a standard set of reminder profiles out of the box— use them as-is, edit them, or create new ones to fit your practice's workflow.

> **NOTE:** Before configuring billing profiles, consult with your billing team and/or Practice Manager on billing codes needed for each visit type. Getting this right upfront will save significant correction time at the claim-level.

Configuring Calendar and Appointment Settings

Calendar and appointment settings control how scheduling behaves across your practice. Configuring these before your team starts booking keeps your front desk moving efficiently — the right duration defaults, display preferences, and appointment fields eliminate manual decisions at the time of scheduling and keep your calendar

running smoothly.

Account Settings are Provider-Specific. If your practice has multiple providers, use the provider dropdown in the top-right corner to switch between providers and configure their settings. Settings configured for one provider will not automatically apply to others.

Setting up Online Scheduling

Making it easy for patients to schedule is directly tied to appointment volume. DrChrono supports two online scheduling options that reduce the burden on your front desk while improving access for patients.

1. OnPatient Scheduling allows patients to request or book basic appointments directly through the OnPatient portal. This is especially effective for established patients and reduces inbound scheduling calls.

2. The **Scheduling Widget** can be embedded on your practice's website, allowing new and existing patients to book appointments without calling the office.

In order to configure either of these scheduling methods, you must complete two steps to get started:

1. Set up the schedule in the office, which you can learn how to set up **here**.
2. For each provider needing online scheduling capabilities, go to Account Settings > General and:
    a. Enable "Access to online scheduling" for each provider needing online scheduling capabilities
    b. Disable "Allow Exam Room Overlaps"(not doing so will result in appointment slots still showing available after booking)

What to Know Before Implementing

There is some important nuance to be aware of when it comes to online scheduling in DrChrono:

- Scheduling Widget embed codes are by office and only factors availability for the "Primary Provider" associated with that office.
    - **What this means:** If you have multiple providers in your practice, in order to leverage online scheduling, an office would need to be created for each provider. We typically suggest that practices with multiple providers (or scaling to multiple providers) use one of our integrated online scheduling partners to power their online scheduling needs.
- OnPatient Scheduling can only support one single type of appointment and one appointment duration
    - **What this means:** If you have varying types of appointments with differing durations for each, enabling scheduling via OnPatient may not be the right approach to allowing self-scheduling.

Alternative Solutions: We highly recommend checking out our online scheduling partners available on our Partner Marketplace. Products like Holly by Nimblr specialize in online scheduling and integrate directly into DrChrono to provide a cohesive scheduling experience for your patients while not sacrificing seamlessness. Many of these integrated partners also deliver additional valuable features like an AI-powered receptionist agent, waitlisting, automated patient recall management, and more.

> **SUCCESS TIP:**
> Test online scheduling before enabling in OnPatient or embedding on your website. This ensures calendar settings are properly configured to prevent double-booking and confirms the booking experience works as expected before offering it to your patients.

Suggested next: Step 7 — Managing and Editing Clinical Forms

Once your scheduling and billing profiles are in place, take a closer look at Clinical Form Management — your hub for building and maintaining the clinical forms (templates) your providers will chart with as well as the intake forms used to capture patient information at check-in.

Helpful Resources

Appointment & Billing Profiles

- Creating Billing Profiles
- Connecting Billing and Appointment Profiles
- Billing Profiles and Fee Schedules
- Adding Billing Profiles from the Appointment Window

Calendar & Appointment Settings

- Setting a Default Appointment Time
- How Can I Change the Default Appointment Color?
- Duplicate Appointment Warning
- Creating and Using Reminder Profiles
- Creating a Custom Appointment Field

Account Settings

- Account Settings: Comprehensive Guide
- Account Settings: Profile
- Uploading Business Logo and Provider's Profile Picture
- Account Settings: General
- Set Time Zones in DrChrono
- Confirming a Provider's Identity for EPCS registration
- Setting Up PDMP with Bamboo Health

Online Scheduling

- Configuring the Online Schedule by Office
- Setting up the Online Scheduling Widget on your website
- Integrated Online Scheduling Solutions

Labs Setup

- Integrating Quest and LabCorp with DrChrono
- Quest Label Printing

- LabCorp Label Printing
- DYMO Label Printer Installation

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

Step 7: Managing and Editing Clinical Forms

Overview | Finding Your Forms | Quick Actions | Options Menu

What is Clinical Form Management?

Clinical Form Management is your central hub for creating, organizing, and maintaining the custom clinical templates used in patient notes. Think of it as your form library — everything lives in one place and **changes save automatically** as you work.

Note:
Clinical Form Management requires Google Chrome. If you're using a different browser, switch to Chrome before proceeding.

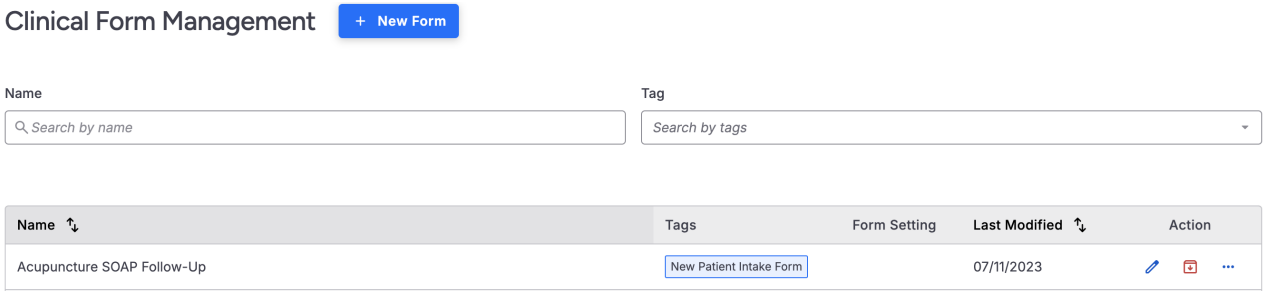
Finding Your Forms

To access your forms, navigate to:

Clinical > Form Tools > Clinical Form Management

Your forms are listed alphabetically by default. You can:

- Search by name using the search box at the top
- Filter by tags using the tag search
- Sort by name (A–Z) or by the date last edited by clicking the column headers



Quick Actions



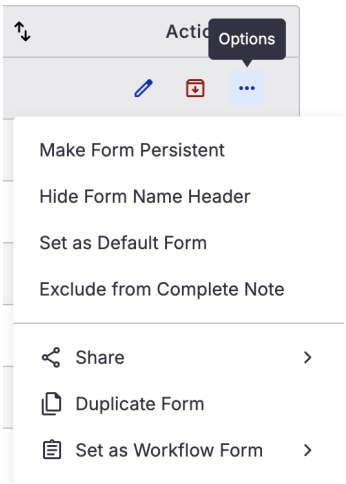
In the Action column next to each form, you'll find three options:

Edit (pencil icon): Open the form to make changes

Archive (box icon): Remove the form from active use

Options menu (three dots) : Access additional actions like sharing, duplicating, and more

Options Menu — What Each Action Does



Clicking the three-dot menu gives you these choices:

- **Make Form Persistent -** Keeps the form visible across all visits — best for long-term patient data like family history.
- **Hide Form Name Header -** Removes the form title from the top when the form is in use.
- **Set as Default Form** - This form loads automatically when creating a new entry. Only one form can be set as default at a time. Setting a new default will replace the previous one.
- **Exclude from Complete Note** - Keeps this form's data out of the compiled note.
- **Share** - Share the form with others via the Form Library or by email.
- **Duplicate Form** - Creates an exact copy — great for making variations without starting from scratch.
- **Set as Workflow Form** - Links this form to an automated workflow.

Automating Your Practice

PRACTICE ADMINISTRATION | AUTOMATING YOUR PRACTICE | ⏰10-MINUTE READ

Now that your practice is configured, it is time to double-check that it is optimized to work smarter for your practice. DrChrono includes automation features across every stage of the patient journey, from scheduling and intake to billing and collections. These features are designed to reduce manual work, minimize errors, and create a more consistent patient experience.

The list below organizes every available automation by workflow stage. Use it to identify where your practice is already optimized and where there's still opportunity to reduce manual effort.

Before the Visit

	Feature	What it does	Configured by
☐	Online Scheduling	Allows patients to book appointments through the OnPatient portal or through a widget embedded on your website, reducing front desk phone volume.	Practice Administrator
☐	Reminder Profiles	Automatically sends patients appointment reminders via SMS, email, or phone at configured intervals before their visit.	Practice Administrator
☐	Follow-up Reminders	Automatically prompts patients to schedule follow-up appointments on a provider-recommended date — set up in advance and customized to fit your recall workflow.	Practice Administrator
☐	Auto Eligibility Checks	Automatically runs insurance eligibility verification for upcoming appointments without manual intervention.	Practice Administrator
☐	Eligibility Groups	Runs eligibility checks for a defined group of upcoming appointments in bulk.	Practice Administrator / Billing Manager
☐	No-Show Predictor	AI-powered insights to assign a risk score to each appointment, helping your practice identify which upcoming visits are most likely to no-show.	Practice Administrator

During the Visit

	Feature	What it does	Configured by
☐	EverHealth Scribe	Listens to the patient encounter and automatically generates clinical note content, reducing provider documentation time.	Provider
☐	Auto-start ePrior Authorization	Automates prior authorization requests when a pharmacy determines that a medication requires a PA— allowing providers to on patient care, not paperwork.	Practice Administrator
☐	Copy Previous Note / Persistent Forms	Automatically carries forward content from a patient's previous note into the current encounter.	Provider

After the Visit — Charge Capture & Billing Status

	Feature	What it does	Configured by
☐	Automate Billing Status via Clinical Note	Automatically updates billing status when a provider signs and locks a note, signaling your billing team that a visit is ready to work.	Practice Administrator
☐	Automate Billing Status via Balance	Configure additional billing status triggers — for example, automatically marking a claim "Paid in Full" when the balance reaches zero.	Practice Administrator / Billing Manager
☐	Bulk Submit Claims	Allows for submitting initial claims to a payer in bulk, saving time over submitting one claim at a time.	No Configuration Needed
☐	Daily Billing Problem Email	Automatically sends a daily email summary of claims with errors, rejections, or issues requiring attention.	Billing Manager

Payment Posting & Collections

	Feature	What it does	Configured by

	Feature	What it does	Configured by
☐	Auto Payment Allocation	Automatically allocates patient payments to open balances based on configured rules, eliminating manual allocation decisions.	Practice Administrator / Billing Manager
☐	Automated Balance Write-Off Rules	Automatically writes off small patient balances that fall below a defined threshold, reducing time spent on low-value collection efforts.	Practice Administrator / Billing Manager
☐	Automate Claim Adjustment	Define custom rules for how adjustment reason codes are handled during payment posting (e.g. route CO45 to a billing status for review instead of auto-adjusting it off).	Practice Administrator / Billing Manager
☐	Text-to-Pay	Sends patients a secure payment link via SMS after their visit, enabling payment without a phone call or mailed statement.	Practice Administrator
☐	OnPatient Patient Payments	Allows patients to view and pay outstanding balances through the OnPatient portal at any time.	Practice Administrator
☐	Enhanced Patient Statement Delivery	Automatically delivers patient statements via email or mail based on configured preferences, eliminating manual generation.	Practice Administrator / Billing Manager

🛤️ You're Ready to Be Your Practice's DrChrono Expert!

Congratulations! You've completed the Practice Administrator learning path.

By now, your DrChrono system should be fully configured and ready to support your practice. You now have the foundational knowledge to confidently manage users, maintain system settings, and keep your practice running smoothly as your needs evolve.

As your practice grows, you'll continue discovering new features and configuration options that can improve efficiency.

What's next?

- Continue exploring advanced features and configuration options as your practice's needs evolve.
- **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 as your go-to resource for system administration, best practices, and new features.
- As new employees join your practice, direct them to the learning path designed for their role to help them get up and running quickly.

You're now equipped to help your practice get the most out of DrChrono!

Data Migration Overview

PRACTICE ADMINISTRATION | DATA MIGRATION | ⏰ 15-MINUTE READ

After reading this article, you will know what data we migrate, when we need each file, how to send us your files securely, and what to do in your previous system while the migration is underway.

BEFORE YOU BEGIN

- If you plan to migrate documents, images and clinical notes, confirm that the data migration is

included on your order form.
- Know who in your practice can request and download data exports from your previous EHR. If that isn't you, identify that person now — every step below will require their help.
- Confirm your go-live date with your Implementation Specialist. Several deadlines below will be tied to when you launch DrChrono in your practice.

Overview

Your migration is delivered in three steps rather than one large import. This is deliberate: it gets your patient list, demographics, appointments, and discrete clinical data into DrChrono early so you can learn and build in a live environment, it keeps your go-live date from being held up waiting on a full historical import, and it means your records come over current and complete instead of as several outdated snapshots.

You provide the files. Our migration team handles the import.

Your Migration Timeline

Step 1 · Initial Import

Your patient list and C-CDA data load into DrChrono early, so you have a real, working environment to build in while you implement and train.

Step 2 · Pre-Go-Live Refresh + Appointments

Refreshed demographics, C-CDAs, and your full schedule are imported right before launch. DrChrono becomes your source of truth from day one.

Step 3 · Documents, Images & Clinical Notes (Post-Go-Live)

Documents, images, and clinical notes move over in a single pass after launch. Use your previous EHR as a read-only reference in the meantime.

Step	What you send	When	Estimated Delivery
Initial Import	Patient demographics, bulk C-CDA, and a sample file containing 1 week* of appointments	Week 0–1	1–3 business days from receipt of correctly formatted files
Pre-Go-Live Dataset	Refreshed demographics, refreshed C-CDA, full appointments file	By 12:00 PM EST the day before go-live	Completed before your go-live (if delivered by 12:00 PM EST deadline)
Documents, Images & Clinical Notes	Complete EHI or documents export from your previous EHR	Immediately after go-live	4–8 weeks from receiving your files

** One week of appointments is what we prefer, but don't get stuck here. If your EHR will only export your entire appointment dataset at once, send that instead — it will work. If you're comfortable deleting rows in a spreadsheet, trimming the file down to a single week helps us review the format faster*

Why do documents come over after go-live?

This approach allows you to go live sooner and with less risk of data gaps or duplicates. When documents are provided before go-live, they have to be provided weeks in advance — which means they are an outdated snapshot in time, and your providers and staff still have to refer back to your previous EHR until we complete a final gap migration after go-live. To keep this simple, our standard approach is to defer documents and clinical notes until after go-live and complete one single migration of these files once you've transitioned.

Want everything imported before go-live?

This is possible, but it comes with trade-offs. Your go-live will be delayed by up to 4–8 weeks from the date we receive your data, additional fees may apply, and because your documents will need to be exported weeks before you transition, anything added or changed in your previous EHR after that export has to be sent again later — which increases the chance of duplicate records in your chart. Talk to your Implementation Specialist before choosing this path.

What Can Be Migrated

DrChrono supports import of the following data types:

- **Patient Demographics** — name, date of birth, contact information, insurance details
- **C-CDA Records** — Continuity of Care Documents from your previous EHR, which typically include medications, problems, and allergies
- **Appointments** — past and future appointments
- **Documents, Images & Clinical Notes** — available when a documents migration is included in your signed order form. These are migrated after go-live. Clinical Notes are uploaded as chart documents and are not imported to the structured Clinical Notes area of each appointment.
- **Available Upon Request** (requires data transfer add-on; imported after go-live): Patient Flags, Immunization Logs

What Cannot Be Migrated

Some information can't come over from your previous EHR. Plan to enter it manually, rebuild it in DrChrono, or keep a read-only reference.

- **Billing and financial data** — claims, patient payments, ERAs/EOBs, credits, and outstanding balances cannot be transferred from any outside system. Plan to keep access to your previous system for accounts receivable follow-up.
- **Stored credit card information** — payment card data on file cannot be migrated. Patients will need to have their card information re-entered in DrChrono.
- **Recurring appointment series** — recurring appointments do not come over as a linked series. Individual appointments in your appointments file will import, but the recurrence itself has to be rebuilt in DrChrono.
- **Blocked or "break" time on your schedule** — lunch breaks, admin time, and other blocked-off time are not migrated. Set these up in DrChrono before go-live.
- **Clinical forms and note templates** — H&P, SOAP, and intake forms must be rebuilt in DrChrono. Standard forms are provided and can be modified.
- **Combined PDFs containing more than one patient** — we can import multiple files per patient, but a single file cannot contain multiple patients, and we cannot split a combined PDF into individual charts. Ask your vendor for one file per patient.

- **Data your previous EHR won't release** — we can only import what your previous vendor provides. We cannot log into your old system, extract data on your behalf, or facilitate the data export.
- **Database copies and backup files** — we cannot accept a copy of your database or a `.bak` file.
- **Anything not listed in *What Can Be Migrated*** — if a data type isn't named there, it isn't part of your migration. If you're unsure whether something is included, ask your Implementation Specialist before you plan around it.

Before You Send Us Anything: Merge Your Duplicates

Look at your patient demographics file before you send it. If the same patient appears on more than one row, that patient will be created twice in DrChrono. Merge duplicate patients in your previous system before you export, or consolidate the data in these rows in the demographics spreadsheet itself, so each patient appears only once.

Data Migration Process

Pre-Work: Set Up Your Box.com Account

We use Box.com to exchange files with you securely. Shortly after your implementation kicks off, you'll receive an email invitation to collaborate on a shared Box folder. Every file in this migration is uploaded to that folder, so set this up before your first export is ready.

Our Providing Clinical Data through Box.com article walks you through creating your free Box account, enabling the two-factor authentication we're required to have in place, and uploading your files to the folder.

> Always upload patient data to the Box folder we invited you to. Do not email patient data, and do not send it through any other file-sharing service.

Step 1: Initial Data Import

This first import gives you a real, working DrChrono environment — your actual patients, their demographics, and their clinical data — so you can build, configure, and train against your own information instead of sample data. Export the following files from your previous EHR and upload them to your Box folder.

Patient Demographics — CSV or XLSX

Export your patient demographics, including available patient details such as name, date of birth, address, insurance information, emergency contacts, referring providers, and other demographic information.

Clinical Data — Bulk C-CDA

Export your clinical data in C-CDA format in bulk. C-CDA files may include medications, problems, allergies, and other clinical information. The specific information included will vary based on your previous EHR's export.

Sample Appointments — CSV or XLSX

Export a sample file containing 1 week of appointments. We use this sample to review the format of your EHR's appointment data before your final appointment migration. This gives us time to identify any formatting issues and work with you on alternatives before your go-live.

Not sure how to pull these files? Most EHRs allow you to export this information directly, and instructions are usually in your EHR's knowledge base or support site. Our Extracting Your Basic Data guide links to export instructions for common EHRs. If you can't find an export, ask your Implementation Specialist for help.

Do not send a full EHI or complete system export at this stage. We need the specific files and formats listed above for your initial migration. Full exports come later, in Step 3.

Using custom patient fields?

If you have custom patient information that isn't stored in standard demographic fields, we may be able to import it if it is included as a column in your demographics file. Before you upload:

1. Create the matching Custom Demographics field in DrChrono under Account → Custom Fields.
2. Make sure the field name in DrChrono matches the column name in your file exactly.
3. Let your Implementation Specialist know your file contains custom fields so our migration team can account for them.

Step 2: Pre-Go-Live Dataset

It's time to provide your final pre-go-live export. Upload these files to your Box folder no later than 12:00 PM EST the day before your planned transition to DrChrono.

Patient Demographics — CSV or XLSX

Export your patient demographics, including available patient details such as name, date of birth, address, insurance information, emergency contacts, referring providers, and other demographic information.

Clinical Data — Bulk C-CDA

Export your clinical data in C-CDA format in bulk. C-CDA files may include medications, problems, allergies, and other clinical information. The specific information included will vary based on your previous EHR's export.

Appointments — CSV or XLSX

We can import both past and future appointments in a single file. You may choose how much appointments data to include, or choose not to migrate appointments at all.

IMPORTANT — this export is your cutover point. Stop working in your previous EHR.

- The moment you finish this export, your previous EHR should become read-only for your practice. **Anything entered or changed there afterward will not be in the migration**, and someone on your team will have to re-enter it into DrChrono by hand after go-live.
- From the moment your export is complete — **even before go-live day** — do all of the following in DrChrono only:
    - Booking new appointments
    - Changing or cancelling appointments
    - Adding new patients or updating patient information

    - Updating patient charts or clinical information
- Practices that follow this have a clean, quiet go-live. Practices that keep working in both systems spend their first weeks on DrChrono re-typing information and chasing down discrepancies. Tell your whole team the cutover date and time before you run the export.
- If something truly cannot wait and has to be entered in your previous EHR, write it down on a shared list so your team can enter it into DrChrono after go-live.
- **Do not send a full EHI or complete system export at this stage.** We need the specific files and formats listed above.

Step 3: Documents, Images and Clinical Notes

This step applies only if a **documents migration is included in your signed order form.** If you're not sure whether yours is, ask your Implementation Specialist.

Complete this step **after** you have fully transitioned to DrChrono. Do not request your final export before your go-live.

1. Contact your previous EHR vendor and request a **complete EHI export or documents export** of your patient records. Export options and terminology vary by EHR, so your vendor can help you identify the right export for your system.

2. If available, request an **EHI (Electronic Health Information) export** that includes patient documents, images, and clinical notes. Most ONC-certified EHRs offer an EHI export, typically at no charge.

3. When you receive the export, upload it to your Box folder without changing it.

Request the export only after you've transitioned to DrChrono — an export completed prior to your transition could result in missing your most recent patient information. When you receive the export, **do not modify, rename, reorganize, or remove any files.**

We use this export to bring additional historical information into DrChrono, including:

- Uploaded chart documents
- Image files
- Clinical notes

Clinical notes from your previous EHR are imported into DrChrono as **uploaded documents within the patient chart**, not as native DrChrono clinical notes. They are viewable in the chart, but they are not editable notes.

Available Upon Request: Patient Flags and Immunization logs can be imported, post-go-live, along with documents, images and clinical notes. Please let your Implementation Specialist know ahead of time if you plan to provide this data to be imported.

This step of the migration is completed within 4–8 weeks of receiving your files. Refer to your previous EHR as a read-only reference for chart documents during this time.

What's Next

1. Accept your Box.com invitation and enable two-factor authentication — nothing else can move until this is done.
2. Merge duplicate patient records in your previous system before you export.
3. Export and upload your initial dataset to your Box.com folderfor us to import, so your DrChrono environment has your production data ahead of launch.
4. Plan your cutover — decide with your team which day and time you stop entering new information in your previous EHR.

ALWAYS PRACTICE WITH A TEST PATIENT: Once your initial import is complete, the patients in your account are real, live production data — not test data. Do not use a real patient chart for testing or learning purposes. Create a test patient (for example, "Test Patient") and use that chart for all practicing, training and testing needs.

Helpful Resources

Providing Clinical Data through Box.com — Data Migrations

Data Formatting Requirements for Migration

Importing Data into DrChrono — Official FAQ

Extracting Your Basic Data

Caveats in Data Migrations by EMR Vendor

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