New User Orientation — Start Learning Here

Last modified on 08/27/2026 1:43 pm EDT

Welcome! Start here for a quick overview before diving into your role-specific tutorial.

Chapter 1: A First Look at DrChrono

ALL USERS | ORIENTATION | ⏰ 10-MINUTE READ

After reading this article, you will be able to navigate the DrChrono interface and understand where key areas of the application live.

Before You Begin

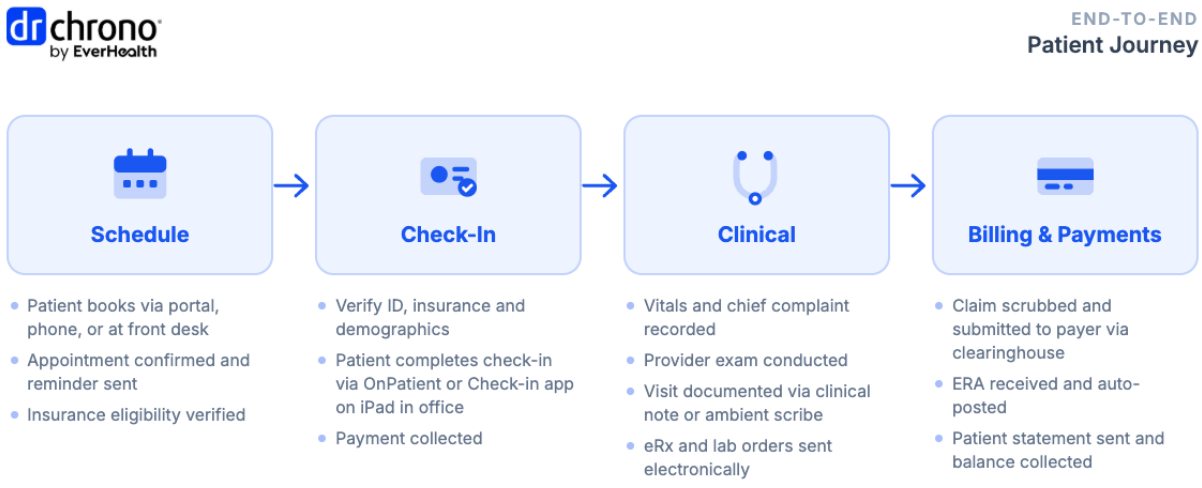
REQUIREMENTS
You'll need: Your DrChrono login credentials
When to use this: Start here — this is the first thing to read before doing anything else in DrChrono.

Welcome to DrChrono

Welcome aboard! Whether you're a provider, receptionist, biller, practice manager or part of your practice's clinical support team, this is your starting point. DrChrono is a cloud-based EHR platform — everything your practice needs to schedule patients, document visits, and manage billing lives in one place. This article gives you a quick orientation to the interface so you can find your way around with confidence from day one.

Patient Journey

DrChrono supports practices through the entire patient journey— from scheduling all the way through to collections.



A First Look at DrChrono

Let's take a brief tour of DrChrono. This walkthrough covers your login preferences, how the platform is organized, and how to navigate to key areas.

Key Areas of the EHR

The Navigation Bar: The main navigation runs along the top of your screen and is your primary way of moving between areas of DrChrono — scheduling, patients, billing, and more. What you see here may vary slightly depending on your role and permissions.

The Calendar: The calendar is the operational heartbeat of your practice. It's where appointments are created, managed, and tracked throughout the day.

The Patient Chart: Every patient in DrChrono has their own chart — a single record that holds their demographics, insurance, clinical notes, and billing history. Almost everything your team does in DrChrono is connected to a patient chart.

The Dashboard: Your dashboard gives you a at-a-glance view of your day — upcoming appointments, outstanding tasks, and any alerts that need your attention.

Next: Chapter 2 — A Full DrChrono Tour

Now that you've got the lay of the land, we'll go one level deeper next — looking at how the calendar, patient chart, and billing workflow seamlessly connect as a patient moves through their visit.

Helpful Resources

Getting Started
Logging into DrChrono Web and iPad
DrChrono App Unlock PIN
Reset Your Forgotten DrChrono Password
Compatible iOS Versions and Devices Supported by DrChrono

Account Basics
How to Upload a Profile Image and Business Logo
Why Does My DrChrono Account Log Me Out Frequently?

Security
How Does Two-Factor Authentication (2FA) Work in DrChrono?
How Does DrChrono Keep My Information Safe?

For Providers
Editing Your Name, Timezone, Personal Details, and Contact Information
Registering to e-Prescribe Medications in DrChrono
Registering to e-Prescribe Controlled Substances in DrChrono

Using ID.me in multiple EHRs for e-Prescribing

How to get Support when you need it!
Help is available for DrChrono 24/7 through our AI-powered chat support agent, Amelia.

Chapter 2: A Full DrChrono Tour

ALL USERS | ORIENTATION | ⏰ 10-MINUTE READ

After reading this article, you will be able to identify the core areas of DrChrono that are most relevant to your day-to-day workflow and understand how they connect to each other.

Overview

DrChrono is built around a simple idea: everything related to a patient visit — the appointment, the clinical note, and the claim — lives in one connected place. This article takes you one level deeper than the orientation, giving you a working understanding of the core areas of the application and how they fit together in your daily workflow.

A Closer Look at DrChrono

This tutorial walks you through the core areas of DrChrono in more detail — the calendar, the patient chart, and how information flows through the platform from scheduling through billing.

How DrChrono Is Organized

Scheduling & the Calendar: The calendar is where patient visits begin. Appointments are created here, assigned to providers and locations, and tracked through the day. The status of an appointment — scheduled, checked in, complete — signals where a patient is in their visit and keeps your whole team aligned.

The Patient Record: A patient's chart is the center of everything in DrChrono. It holds their personal and insurance information, their visit history, their clinical notes, and their billing record. Every action your team takes — from checking a patient in to submitting a claim — is connected to the patient record.

Clinical Documentation: Providers document patient visits through clinical notes inside the patient chart. Notes are created during or after the encounter and, once signed, trigger the billing workflow.

Billing & Claims: Once a clinical note is signed, the visit moves into the billing workflow. Charges are reviewed, codes are applied, and claims are submitted to insurance — all from within DrChrono.

🛤 You've Completed Your Foundation!

Congratulations! You've finished the foundational setup that every new DrChrono user should complete. At this

point, you should be able to:

Sign in securely
Set up your user account and preferences
Navigate the DrChrono interface with confidence
Know where to find help when you need it

Think of this as your starting line—now it's time to learn the workflows that power your day-to-day responsibilities.

Choose your learning path:

Practice / System Administrator Start Guide Now
Configure your practice, manage users, maintain settings, and oversee operations.

Front Desk & Reception Start Guide Now
Master scheduling, patient check-in, registration, and front-office workflows.

Providers & Clinical Staff Start Guide Now
Learn charting, documentation, prescribing, orders, and patient care workflows.

Billing & Coding Staff Start Guide Now
Learn claims, payments, coding, and revenue workflows.

Practice Manager Start Guide Now
Oversees practice operations and ensures the financial health of the business.

> **Wear more than one hat?:** No problem — this guide is organized by role, but we know many people juggle several, especially in smaller practices. Think of the roles as a menu: pick whatever fits what you do, and skip the rest. Wherever you land, we've got you covered.

Helpful Resources

> **Implementing DrChrono in your Practice?**
> Check out our Implementation Overview for more information about the process, timeline and what to expect.

The Calendar
How to Search for a Patient — Web & iPad
What Do the Lock and Flag Icons on My Appointments Mean?
Duplicate Appointment Warning

The Patient Record
How to Add, Edit, and Archive Patient Insurance
Creating Custom Patient Demographics
How Do I Backup All of My Information Within DrChrono?

Billing Basics
Getting Started with Billing Through DrChrono
Explaining Basic Billing Concepts

Getting to Know the Billing Menu

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