Practice Management: Everything in One Place

Last modified on 09/22/2026 1:36 pm EDT

DrChrono streamlined how you manage your practice by consolidating offices, facilities, groups, providers, staff, permissions, roles, and role-based dashboards into a single **Practice Management** menu (accessed from the **Account** menu). All of the features below are found under the **General Management** tab, which is the default tab when you open **Practice Management**.

> Large practice groups with 25 or more providers don't have the **Practice Management** menu yet. This will be available in a future release. See What's changed for details on updated navigation paths.

Everything related to practice configuration is centralized in a single menu, making it faster and easier to manage your entire practice setup without jumping between different areas of the system.

> For detailed guidance, refer to Manage Practice Settings for links to all related articles.
> Watch this video for an overview.

Here's what you can do from one place.

- **Manage offices** — View and manage all your office details, including open hours (**Work Schedule**) and billing settings, organized in easy-to-navigate collapsible sections.

- **Manage providers and staff** — View and edit provider and staff details from dedicated pages. The **Staff** page includes search, filters, and status categories (active, inactive, and pending), making it easier to track staff who haven't yet activated their accounts.

- **Manage facilities and groups** — View and edit facility and group details.

- **Roles & Permissions** — View both system-created and custom roles. You can enable or disable permissions individually or by group, and search for specific permissions to make quick changes. The same permission management applies to individual staff members and providers.

- **Permission Grid** — A side-by-side comparison tool lets you select specific users and compare their permissions at a glance, with the ability to search for particular permissions within the grid.

- **Role-based dashboards** — You can assign dashboards to specific roles, giving you a tailored dashboard experience based on your role while still allowing individuals to create their own personal dashboards.

What's changed

New Practice Settings	Old Practice Settings	Changes

New Practice Settings	Old Practice Settings	Changes

PRACTICE SETTINGS
Practice Management
Organization Profile
eRx Settings
SAML SSO
	PRACTICE SETTINGS
	Offices
	Facilities
	Staff Members
	Staff Permissions
	Tag Management
	Patient Chart Settings
	Organization Profile
	eRx Settings
	SAML SSO
		• **Patient Chart Settings** and **Tag Management** are tabs under **Practice Management**.
		• The following pages are sections under **Practice Management** > **General Management**:
		  ◦ Offices
		  ◦ Facilities
		• The following pages were removed and are sections under **Practice Management** > **General Management**:
		  ◦ Staff Members previously had tabs for **Providers**, **Staff**, and **Groups**. They are now separate sections.
		  ◦ Staff Permissions is now **Roles & Permissions**.

