DrChrono Implementation Overview

Last modified on 06/26/2026 12:58 pm EDT

All new DrChrono by EverHealth customers are supported through our implementation program with a structured, dedicated engagement designed to get your practice live and confident on DrChrono as quickly as possible. Your Implementation Specialist will manage the timeline, coordinate training, and serve as your primary point of contact from kickoff through go-live and beyond.

Implementation Stakeholders

Your practice will be supported by a dedicated team throughout the engagement.

Role	Responsibilities
Implementation Specialist (IS)	Your primary point of contact throughout the project. Manages the overall timeline, coordinates tasks, delivers training, monitors progress, and ensures a successful go-live. Assigned to all active Guided implementations.
Billing Consultant (BC)	Responsible for billing best practices within DrChrono, including claims, A/R management, statements, and reporting. Engaged if you plan to bill through DrChrono or utilize RCM Services.
Your Main Contact (Customer Team)	Your organization's designated point of contact during implementation. Responsible for attending scheduled sessions, completing onboarding tasks (account setup, billing enrollments, etc.), and providing data needed to advance the project.

Implementation Timeline

Your implementation follows a structured, IS-led engagement with dedicated training sessions and post-go-live support. Target go-live is within 3–5 weeks of kickoff, though we work to accelerate this wherever possible.

Week	DrChrono by EverHealth Team	Customer
Week 0	• Assign Implementation Specialist • Send kickoff email with IS contact information • Schedule Kickoff Call	• Review Getting Started module • Complete Intake Form • *Provide initial patient data for import (demographics, CCDA, sample appointments)
Week 1	• Kickoff Call • Schedule training sessions • Account Settings Training • ^Enrollments Overview Session	• Attend Kickoff Call • Configure account settings • ^Initiate payer enrollments
Week 2	• Front Office Training (scheduling, check-in, payments) • Clinical Form Management Training • ^Billing or RCM Overview Session	• Build clinical forms (if applicable) • Continue account configuration
Week 3	• Clinician Trainings (Charting, iPad EHR, Message Center, Task Center) • Administrator Training (Reporting)	• Ensure all clinical staff complete relevant training sessions

Week	DrChrono by EverHealth Team	Customer
Week 4	• Pre-Go-Live Q&A • Coordinate Go-Live Day	• *Provide updated pre-go-live data by 12:00 PM ET the day prior to go-live • **Go Live** 🎉
Weeks 5–12	• Host Post-Go-Live Working Sessions (as needed) • ^Billing & A/R Sessions • *Data Import Completed (within 4–8 weeks of file receipt)	• *Send documents, images, and clinical notes for import • Attend working sessions (as needed) • Transition to Customer Support & Customer Success

^RCM and Billing customers only

** Data import customers only & Comprehensive data import customers only*

Training & Learning Resources

DrChrono provides a combination of live, IS-led sessions and on-demand support resources to ensure your team is confident using the platform. Training is scoped to your plan features based on notes from your Account Executive and your Kickoff Call.

📖 **On-Demand Training Library**
Video tutorials and guides available anytime in the DrChrono knowledge base.

🎥 **Live Q&A Sessions**
Customers receive scheduled live training sessions and post-go-live office hours. All customers can access working sessions as needed.

❔ **24/7 AI Chat Support**
Available directly in the DrChrono application around the clock. Get instant answers to setup and workflow questions without waiting for a scheduled session.

Training Coverage

Most implementations involve **6–14 hours of sessions** depending on the features and services used — though many practices need less. If billing or RCM services are included, additional sessions will be planned accordingly. Your IS will establish the training plan at kickoff.

Sessions are role-based and completed once. Repeated or additional sessions beyond the agreed scope may be subject to additional fees. On-demand resources and the 24/7 AI chat assistant are available for reference after any session.

Data Migration

What Can Be Migrated

DrChrono supports import of the following data types. Details on scope and format requirements are available in the Data Migrations section of our knowledge base.

- Patient Demographics — Name, date of birth, contact information, insurance details
- CCDA Records — Continuity of Care Documents from your previous EHR
- Appointment History — Past and future appointments
- Documents, Images & Clinical Notes — Available as part of a comprehensive data migration (post-go-live)

Forms cannot be migrated from another EHR. Clinical and intake forms must be rebuilt in DrChrono. Stock forms are provided and can be modified, and self-paced learning content is available on form building.

Migration Timeline

Data migration is delivered in phases to minimize disruption and support an earlier go-live:

- **Phase 1 (Week 0–1):** Provide initial patient demographics, CCDA, and a sample appointments file for format validation.
- **Phase 2 (Pre-Go-Live):** Provide an updated demographics, CCDA, and full appointments file no later than 12:00 PM ET the day before your scheduled go-live.
- **Phase 3 (Post-Go-Live, Comprehensive Only):** Send documents, images, and clinical notes immediately after go-live. Completed within 4–8 weeks of receipt. Use your previous EHR as a read-only reference in the interim.

Want all data imported before go-live? This is possible but will delay your go-live by up to 4–8 weeks from data receipt. Additional fees may apply.

Data Quality Requirements

- **Duplicate Records:** Patient records with duplicates must be merged prior to providing data. DrChrono cannot merge records after import. Merging should be completed in the source system or the dataset directly.
- **Timing:** Once you export your pre-go-live batch, all new chart and schedule updates (excluding clinical documentation on existing patients) should be made directly in DrChrono — even before go-live day.

Interface Setup

Third-party interface timelines vary by vendor. Below are typical setup windows:

Vendor	Typical Setup Time
Quest Diagnostics	Up to 3 weeks
Labcorp	Up to 6 weeks *(coordinating with your Labcorp rep early can significantly reduce this)*
Immunization Registries (via Ironbridge)	Varies — a few days to several weeks; contact your registry for details

Hours of Operation

DrChrono by EverHealth Implementation Team	DrChrono Support

DrChrono by EverHealth Implementation Team	DrChrono Support
Hours: Monday – Friday, 8:00 AM – 5:00 PM ET *Your assigned Implementation Specialist's name and contact information will be included in your kickoff email.*	**24/7** AI-powered Chat Assistant (in-app) **Live Phone Support:** Monday – Friday, 8:30 AM – 5:00 PM ET **Knowledge Base:** support.drchrono.com

Frequently Asked Questions

What data can and cannot be migrated?

Patient demographics, CCDA records, appointments, documents, and clinical notes can be migrated. Data that **cannot** be migrated includes clinical templates, billing/ledger/payments, recurring appointments, and credit card information. See the Data Migrations section of our knowledge base for full details.

How long does data migration take?

Migration is delivered in phases to support an earlier go-live. Initial demographics and CCDA are imported in the first week. A pre-go-live batch is imported the day before go-live. For comprehensive imports (documents, images, clinical notes), provide data immediately after go-live; import is typically completed within 4–8 weeks of receipt. Importing all data before go-live is possible but will delay your go-live by up to 4–8 weeks.

How much time should I expect to spend each week?

This varies based on your features, services, and team size. Generally, plan for **2–6 hours per week** across working sessions and account setup. Weeks with heavy training or go-live preparation may require more time, particularly for practices with multiple locations or more than 10 users.

How soon can I go live with DrChrono?

Most customers go live within **2–4 weeks of kickoff**. Data migrations and payer enrollments can be variables — let your IS know your priorities so we can sequence accordingly.

Do I need to start implementation immediately after signing up?

We strongly recommend starting as soon as possible to get maximum value from your implementation window. Delayed starts are generally honored up to 1 month, unless special terms apply. Note that software fees are invoiced upon signing and continue per your agreement terms regardless of implementation start date.

Can I pause my implementation?

Brief pauses of up to 2 weeks are accommodated. Longer pauses can reduce momentum and diminish the effectiveness of training, as learnings are best reinforced through active use.

What if an external factor delays my implementation (e.g., licensing, construction, hiring)?

We understand delays happen and will do our best to accommodate. We'll work with you to determine if there's anything we can advance in the meantime. Note that recurring software and service fees continue per your agreement terms during delay periods.

What happens if a new user joins our team during implementation?

Our implementation plan is designed for structured, group-based learning. We generally do not repeat sessions for new users during the engagement. New team members should be directed to the DrChrono knowledge base. Unused office hours after go-live can be used to onboard new users. After implementation closes, any unused hours expire; additional hours are available for purchase.

Should I expect every user to be fully proficient on DrChrono when we go live?

Not on day one — and that is completely normal. Becoming proficient with any new software or tool takes time and real-world repetition. Working sessions are designed as group sessions by role and function to reinforce the content your team reviews ahead of go-live, but true confidence builds through daily use. It is perfectly normal for users to still be finding their way around on go-live day, and it is acceptable to expect best practices to continue developing in the weeks that follow.

This is exactly why DrChrono includes a 24/7 AI-powered chat assistant built directly into the application — so your team always has support in the moments they need it, whether it is go-live day or three months later. The DrChrono knowledge base is also available to support continued learning at every stage.

Who is responsible for account setup?

Account setup is the customer's responsibility. DrChrono provides knowledge base guides covering account setup, clinical and intake form building, and billing enrollments. Your IS and the 24/7 chat assistant are also available to provide guidance throughout.

Can clinical or intake forms be migrated from my current EHR?

No. Forms cannot be migrated from another EHR. Stock forms are provided and can be modified to meet your needs. Knowledge base guides on form building are available, and customers will receive a form-building working session during implementation if needed.

Do you offer onsite implementation services?

Yes, onsite engagements are available (additional per-day fees plus travel expenses apply). We require a minimum 2-day commitment for onsite work. That said, our remote implementation services are highly effective, and the majority of customers complete implementation entirely remotely.

Do you provide credentialing services?

DrChrono by EverHealth does not provide credentialing services.

Can you accommodate unique or custom workflows?

For specific or highly customized workflows, we recommend discussing this with your Account Executive prior to signing up. We want to ensure DrChrono can meet your needs before you commit.