

Locations (Offices) Configuration Guide

Last modified on 10/22/2026 9:20 pm EDT

Key configuration options | Example | Before going live

The **Locations (Offices)** section under **Self-Scheduling** lets practices configure the locations patients can book through the Web Scheduler. Each location entry has its own label, hashtag, and scheduling link, along with settings for the offices, appointment profiles, providers, and insurance information used in that booking flow.

Key configuration options

Main location settings

- **Label:** Enter a clear name for the location, such as "Downtown Clinic." Use a name patients can easily recognize when booking.
- **Hashtag:** Set a unique identifier for the location, such as "DowntownClinic." Use a different hashtag for each location entry.
- **Active:** Turn on the location to make it available for self-scheduling. Turn it off when patients should no longer book through this location entry. You can only turn this on once **Additional Settings** are configured.
- **Web Scheduling:** Select **Copy link** to copy the scheduling URL for this location. Share the link with patients or use it on the practice's website.
- **Additional Settings:** Select **Show** to expand the settings for that location. Select **Hide** to collapse them.

Additional booking settings

- **Logo:** Select **Upload** to add the logo associated with this location. Review how it appears in the Web Scheduler.
- **Select Office:** Select the office or offices associated with this location entry. Confirm that each selected office is the intended destination for bookings.
- **Appointment Profiles:** Select the appointment profiles patients can book through this location, such as Consultation or Telehealth.
- **Providers:** Select the providers patients can book with through this location. Confirm that they're available in the selected offices and offer the selected appointment profiles.
- **Gather Insurance Card Photo:** Turn this on to request a photo of the patient's insurance card during booking.
- **Gather Extended Insurance Information:** Turn this on to request additional insurance details during booking.

Manage the location list

- **Add:** Select **Add** to create another location entry, and then configure its label, hashtag, offices, appointment profiles, providers, and insurance settings.
- **Search and page controls:** Use the search box to find a location and the arrows to move between pages.
- **Delete:** Use the trash icon to remove a location entry from this configuration. Review the entry carefully before removing it.

Example

- **Scenario:** A practice wants a dedicated booking link for consultations at its downtown office.
- **Setup:** Add a location labeled "Downtown Clinic" with the hashtag "DowntownClinic." Under **Additional Settings**, select the downtown office, the Consultation appointment profile, and the providers who offer consultations there. Upload the clinic logo and turn on the insurance collection options the practice needs.

Turn on **Active** and select **Copy link** to share the location's scheduling URL.

- **Outcome:** Patients use the dedicated link to book consultations with the selected providers at the downtown location, based on available schedules and the configured booking rules.

Before going live

Confirm:

- **Location identity:** The label is clear, the hashtag is unique, and the active status and logo are correct.
- **Booking coverage:** The selected offices, appointment profiles, and providers match the services offered at this location.
- **Insurance requirements:** The location's insurance collection settings match the practice's needs. Review profile-level **Insurance Settings** as well; profiles set to **Location Default** use the location's configuration.
- **Availability: Scheduling Templates** and other availability settings support the intended booking times for the selected offices, profiles, and providers.
- **Patient experience:** Open the copied scheduling link and complete a test booking. Check the location branding, appointment profiles, providers, available slots, and insurance requests.



If you require further assistance, contact our Customer Support team via in-app chat, email us at support@drchrono.com, or call us at (844) 569-8628.