Create Offices - Beta

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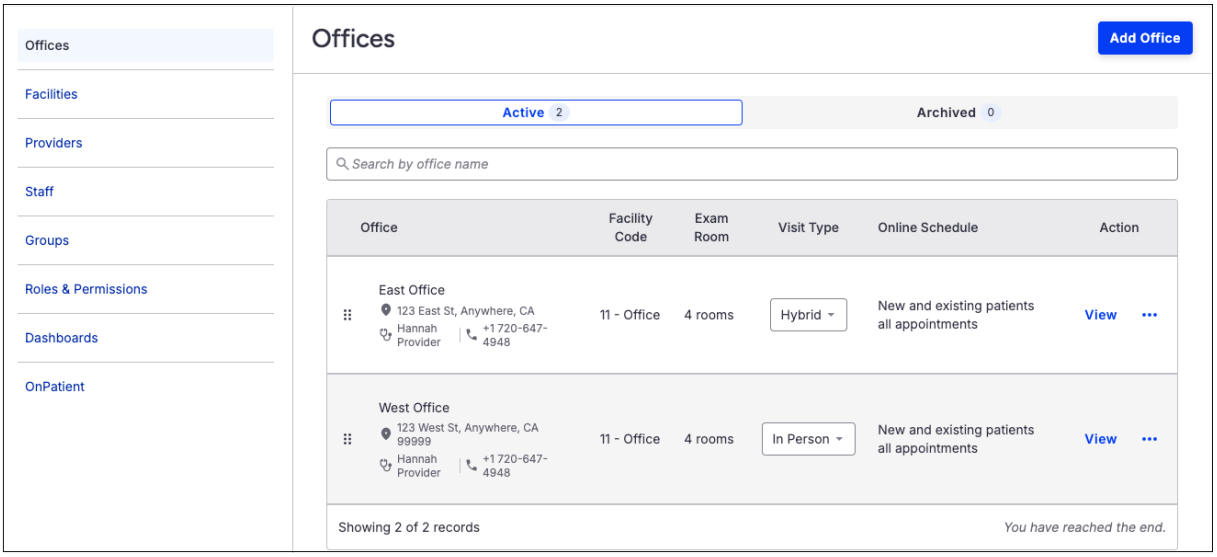
You can create and set up offices from the **Offices** page. On the initial page, enter the basic office details, including the office name, address, phone number, office hours, and exam room information. This is the minimum information required to create an office.

For related articles on additional office setup for work schedules, billing, and online scheduling, see Related articles.

Create an office

1. Select **Account** > **Practice Management** > **General Management** > **Offices**.
2. Select **Add Office** to open the **Add Office side** panel.

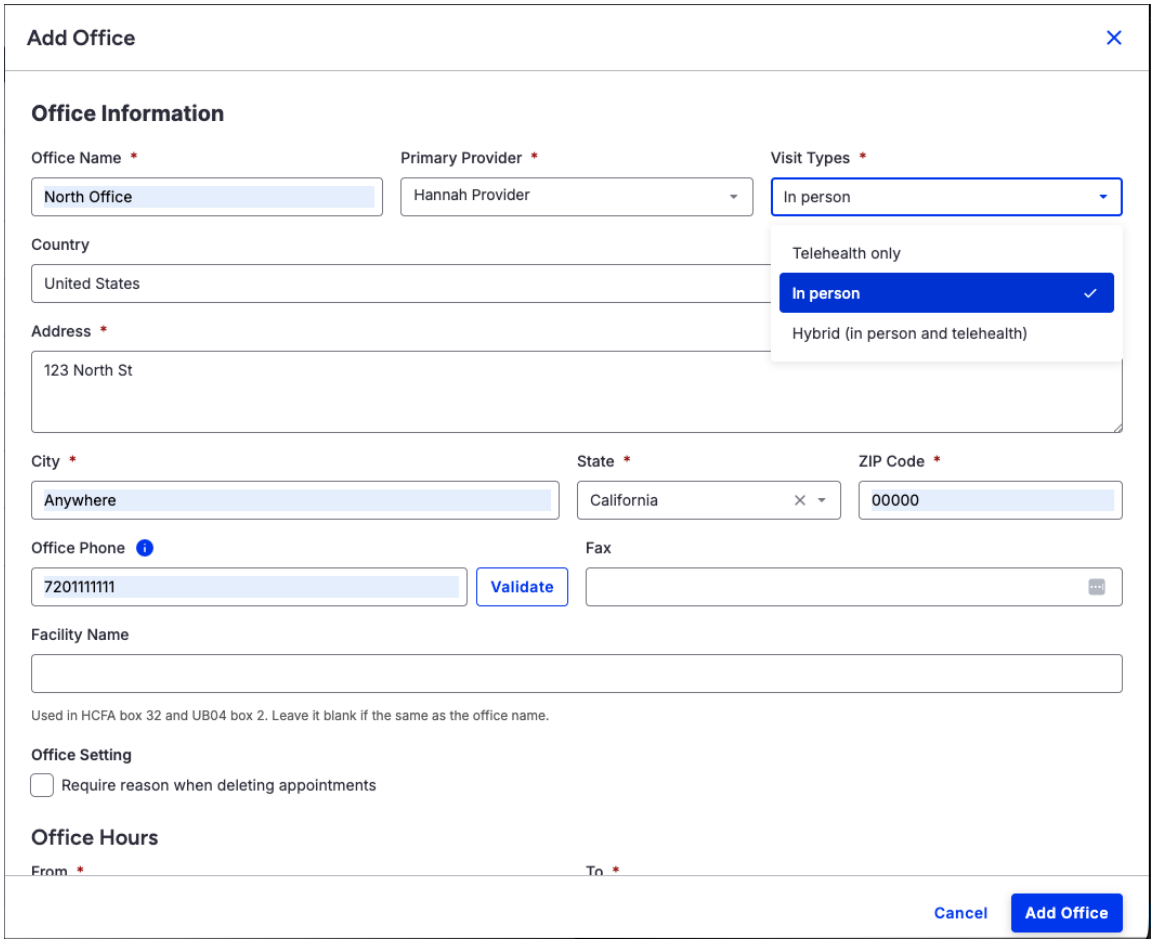


3. Enter the office name, select the primary provider, and complete the office information.

> The scheduling process always uses the provider selected in the provider dropdown, taking precedence over the primary provider set in **Offices**. For example, if Dr. A is selected in the dropdown, Dr. A will appear throughout the scheduling process—even if Dr. B is listed as the primary provider in **Offices**.

   - **Primary Provider:** The primary provider is the provider listed on the appointment when booked through the scheduling widget during online scheduling.
   - **Visit Type**: Select whether the office is in-person only, hybrid, or telehealth only. The visit type controls which appointments can be scheduled in DrChrono, the online scheduling widget, OnPatient, and the API.
     - **In person:** Only in-person appointments
     - **Hybrid:** In-person appointments and video visits
     - **Telehealth only:** Only video visits
   - **Office Phone:** Select **Validate** to validate the office phone number. The office phone number appears as the call-back number in text and email reminders to your patients.

- **Facility Name:** The facility name appears in HCFA box 32 and UB-04 box 2. If left blank, the office name appears in those form boxes.



4. Set the office hours.

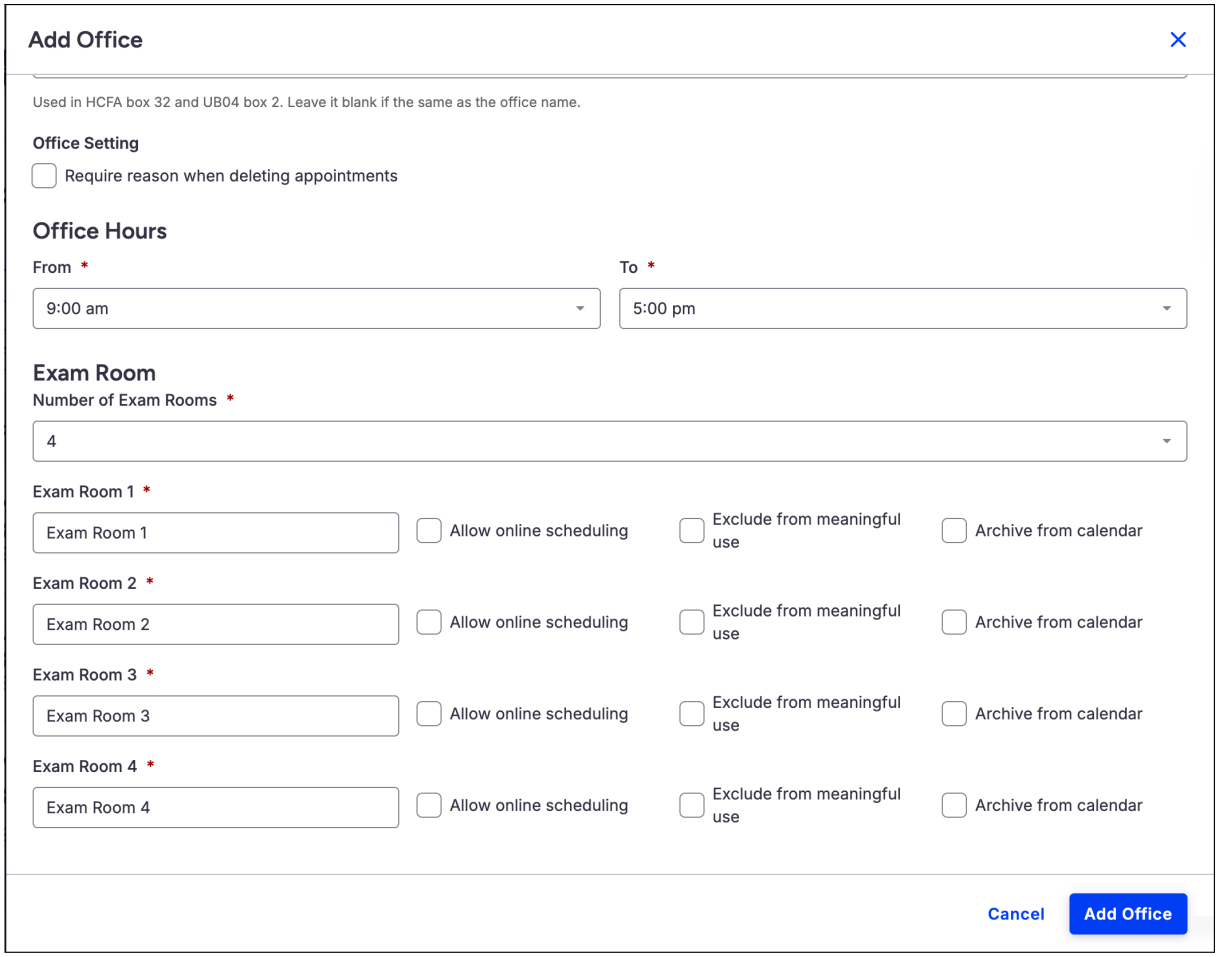
5. Enter the number of exam rooms and exam room names, and select the optional checkboxes.

    - **Allow online scheduling:** Enables online scheduling for this exam room (through OnPatient or the scheduling widget). When patients schedule appointments, they show up in DrChrono. To learn how to edit online scheduling settings, refer to Set Up Online Scheduling for Your Office.

    - **Exclude from meaningful use:** Excludes this exam room from meaningful use.

    - **Archive from calendar:** Archives this exam room from the calendar. To reactivate the room, clear the checkbox.

6. Select **Add Office**.



The newly set-up office appears in the office list.

Related articles

- Edit Basic Office Information
- Edit the Office Work Schedule
- Edit the Office Billing Information
- Set Up the Office Online Schedule