Release Notes - April 4, 2025

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New features | **Enhancements** | **Resolutions** | **Coming soon**

New features

EOB view for 835 files

We created an option to access the necessary details from DrChrono without logging into a separate portal. Providers and staff can clearly explain claim adjustments, insurance coverage, and patient responsibility without needing external resources.

Knowledge base article

Product/Procedure report

The **Product/Procedure** report shows you what CPT/HCPCS/Custom codes have been billed throughout your practice and detailed patient information if you need to dig deeper. Offices use this report to identify their office's most-used procedures and custom codes.

Knowledge base article

Insurance Payer Mix report

The **Insurance Payer Mix** report details the account's revenue and allows you to drill down into certain segments, such as commercial insurance, Medicare, Medicaid, or self-pay patients. This information will enable the office to understand the proportion of income from each payer segment.

Knowledge base article

Enhancements

HCFA box 32 improvements

If the POS on the claim is 12 (home or private residence of the patient), the patient's home address appears in box 32 of the paper HCFA form or in loop 2310C in an 837 file.

Knowledge base article

Unbalanced filter on the Remittance Report screen

We added an unbalanced filter on the **Remittance Report** screen. You can use this filter to quickly find ERA/835 files where the ERA Paid amount and Check/EFT amount do not match.

Knowledge base article

Updated patient chart ID format

To prevent duplicate patient charts, any new patient chart will use the new format — first two letters of last name + first two letters of first name + 8 random alphanumeric characters. Example: LAFIX60CE29C

Knowledge base article

Support PIN workflow improvements

You no longer have to save the page when you generate a new PIN.

Knowledge base article

Name fields are not editable in the live support chat form

The live support chat form's first and last name fields are no longer editable.

Knowledge base article

Updated API terms of service

We updated the API terms of service in DrChrono to reflect our current processes. Some changes include additional language around FHIR and access to our APIs. To see the new terms and conditions, go to https://app.drchrono.com/api-terms/.

Value-add services section removed from API documentation webpage

The value-add services section was removed from the API documentation webpage because it was outdated and no longer used.

Updated terms of service on API documentation webpage

We updated the terms of service on the API documentation webpage to reflect our current processes. Some changes include additional language around FHIR and access to our APIs. To see the new terms and conditions, go to https://drchrono.com/api-docs/.

Resolutions

ERA processing and adjustment master rules

We fixed a bug where an adjustment master rule was not applied with the stated action when an ERA/835 file was received.

Error received when processing a patient payment

We fixed an issue where an undefined error message was returned when processing patient payments.

Async Appointments List API improvements

We fixed an issue where the AppointmentsList API didn't honor the show_archived flag, preventing you from getting the list of deleted appointments. All appointments are now included in the response.

Coming soon

Chart optimization enhancements

We are thrilled to announce upcoming features designed to streamline your workflow and enhance patient care.

Redesigned patient header

The patient header is now fixed and auto-collapses, making it easier to access key patient information while scrolling. New features include showing gender identity, a copy-to-clipboard function for patient names, and launching the OnPatient access screen directly from the patient header.

Customizable patient chart header

The header can now be customized, allowing you to see the most relevant patient data based on your specialty or role.

Patient chart summary

The new patient summary offers a quick, read-only view of essential patient information, with links to relevant chart sections. Future updates will include additional widgets and making the summary view interactive and customizable.

Patient chart sidebar navigation customization

You can customize the patient chart, based on your specialty or role, by showing, hiding, or reordering tabs

Optimized patient problem list

The problem list provides flexibility and clear visibility into your patients' conditions. You can easily add, edit, or remove problems, ensuring you have up-to-date, comprehensive information on all active health concerns.

Optimized patient allergy list

The allergy list is streamlined to exclude unnecessary codes with an improved **Add Allergy** feature. The system prevents you from adding non-drug allergies when medication allergies are already listed and blocks duplicate allergen entries.

Webinar

Empower Webinar

Knowledge base articles

- Patient Header
- Customize the Patient Chart Header
- Patient Chart Summary
- Patient Chart Sidebar Navigation
- Optimized Patient Problem List

- Optimized Patient Allergy List
- Chart Optimization Tutorial Videos

Linked accounts

We are pleased to introduce the new linked accounts feature for providers who manage multiple practice groups.

You can designate a primary account and link additional practice group accounts so you can effortlessly switch between them without needing to log in separately. This enhancement streamlines your workflow and boosts efficiency, ensuring a seamless experience managing multiple practices. To link your accounts, you must create a support case. You will receive notifications once your accounts are linked.

Knowledge base article

New Settings permissions

We will be offering more flexibility around **Settings** access.

- **Account Settings** permission - With this new permission AND the existing **Settings** permission turned on, you can access the **Account Settings** page.
- **Custom Fields** permission - With this new permission AND the existing **Settings** permission, you can access the **Manage Custom Data** page.
- **Office Settings** permission - With this new permission AND the existing **Settings** permission turned on, you can access the **Manage offices** page.
- **OnPatient Settings** permission - With this new permission AND the existing **Settings** permission turned on, you can access the **onpatient Settings** page.

No action is needed for users who already have the current **Settings** permission. You will automatically be granted the new permissions when they are added. Practice administrators can remove the new permission for users who need access removed to any of the new areas without impacting their other page access.

Redesigned Dashboard

We are excited to announce the redesigned **Dashboard**. This enhanced **Dashboard** will provide you with:

- Easier access to patient charts
- A user-friendly view of appointments for the day
- Improved handoff between front office and clinical staff
- Better visit status tracking
- A step forward toward a more workflow-driven, user-centric dashboard
- Simpler navigation

This feature started rolling out on March 24 and will be turned on for all users by April 14.

Knowledge base article

Tutorial video

Support PIN validation

We will fix an issue where when a Support team member validated a user's **Support PIN**, the action appeared in the Support team member's audit log instead of the user's. Support PIN validations will appear in the user's audit log.

This fix will roll out starting April 7 and be available to all users by April 10.