Release Notes - May 1, 2025

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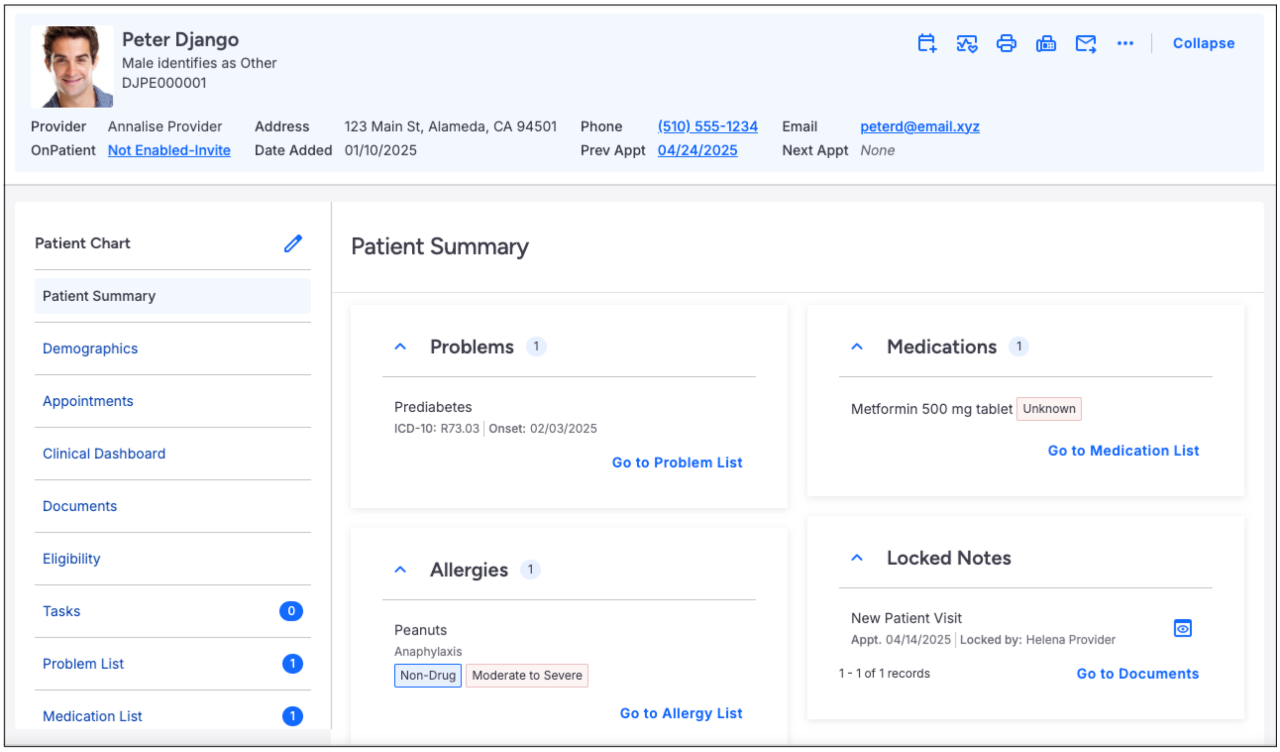
New features

New and improved patient chart experience

We are thrilled to announce the complete optimization of the patient chart, streamlining your workflow and enhancing patient care.

> Following a gradual rollout beginning April 17, the new patient chart experience is now available to all users.



Redesigned Patient Header

The **Patient Header** is fixed, making it easier to access key patient information while scrolling. New features include:

- Showing gender identity
- A copy-to-clipboard function for patient names
- Direct access to invite patients to OnPatient from the **Patient Header**.

Customizable Patient Header

Customize the **Patient Header** to highlight the patient data most relevant to your specialty or role. Add new fields (for example, Patient Balance, Preferred Pharmacy) to the header.

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 interactive, customizable options.

Customizable Patient Chart Sidebar

Customize the patient chart by showing, hiding, or reordering tabs based on your specialty or role.

Optimized Problem List

The **Problem List** provides flexibility and clear visibility into your patients' conditions. Easily add, edit, or remove problems to maintain an up-to-date, comprehensive health record.

Optimized Allergy List

The **Allergy List** is now more streamlined:

- 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

Related resources

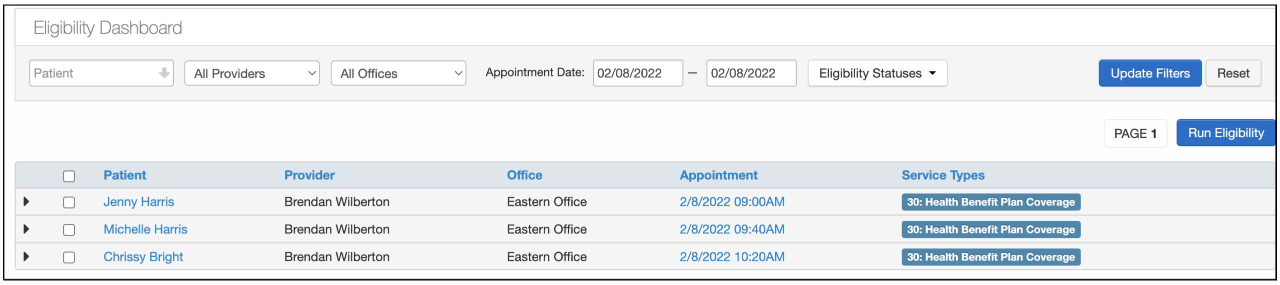
- Empower Webinar
- Customize the Patient Chart Header
- Customize the Patient Chart Sidebar
- Patient Chart Allergy List
- Patient Chart Header
- Patient Chart Permissions
- Patient Chart Problem List
- Patient Chart Sidebar Navigation
- Patient Chart Summary
- Patient Chart Tutorial Videos

Enhancements

Enhanced Eligibility Dashboard

We are excited to announce a redesigned and optimized real-time **Eligibility Dashboard**. You can now:

- Create eligibility groups
- Check eligibility and benefits for a specific specialty



Related articles

- Create and Use Eligibility Groups
- Real-Time Eligibility Verification from a Patient's Chart
- Specialty Specific Eligibility

Visibility of the patient's allergy and problem record

Primary providers have full access to their patients' medical records, including all entries in the **Allergy List** and **Problem List** within the patient chart. Staff members associated with a primary provider can also view the patient's **Medication List**. When adding new staff, you must assign a primary provider to ensure appropriate access permissions.

Visibility of the patient's medication record

Primary providers now have full access to their patients' charts, including complete visibility of the **Medication List**. Staff members linked to a primary provider also gain access to view this list.

Key updates:

- Primary providers can view all medications prescribed to their patients.
- Staff must be linked to a primary provider during setup to receive appropriate access.
- Medication ownership is now assigned to the patient’s primary provider, not the prescribing physician.

Membership subscription updates

You can now manage patient membership plans directly from the patient account. Similar to payment plans, you can skip a payment, cancel a plan, and send receipts after a payment is processed.

New terms and conditions on the API Management page

You are prompted to accept new terms and conditions the next time you use the API Management page.

Resolutions

Updated chart ID logic for names with apostrophes

Apostrophes are now skipped during chart ID creation.

Direct messaging improvements

We fixed an issue that prevented some users from successfully transmitting patient clinical summaries through the direct messaging system.

Custom vital dropdown selection improvements

We fixed an issue where the blank option was missing after you selected a dropdown for a custom vital in a patient's record.

Outgoing electronic prescriptions improvements

We fixed an issue where a red error icon incorrectly appeared in the **Outgoing Prescriptions** report, even though prescriptions were successfully sent to pharmacies that accept electronic scripts through DrChrono.

Bulk locking clinical notes

Clinical notes with missing values in required fields cannot be bulk locked. Some notes with incomplete required fields may still appear in the initial window for selecting notes to bulk lock. Any notes that couldn't be locked—due to missing required information or being completely blank—are listed in a message sent to the doctor's inbox in the **Message Center**.

Editing restrictions for shared clinical forms

Editing restrictions set by a shared form owner are applied in **Clinical Form Management**.

Patient payment plans on patient statements

Future payment plan payments no longer incorrectly appear on patient statements.

Support PIN generation

We fixed an issue where a new PIN wasn't generated for users after two successful validations. A new PIN is now generated after every successful validation.

Patient flag log type in the Audit Log

Patient flags now appear as a filterable log type in the **Audit Log**.

Advanced Report saved filters

We fixed an issue where adding or removing saved filters in the **Advanced Report** was not recorded in the **Audit Log**. These actions are now properly tracked, and saved filters remain in place unless manually deleted.

Access to the Tutorial and Documentation pages of previous API versions

We fixed an issue on the DrChrono API page so users can access previous versions of the Documentation and Tutorial pages.

Upgrade Account page links

We fixed the broken links on the **Upgrade Account** page.

Coming soon

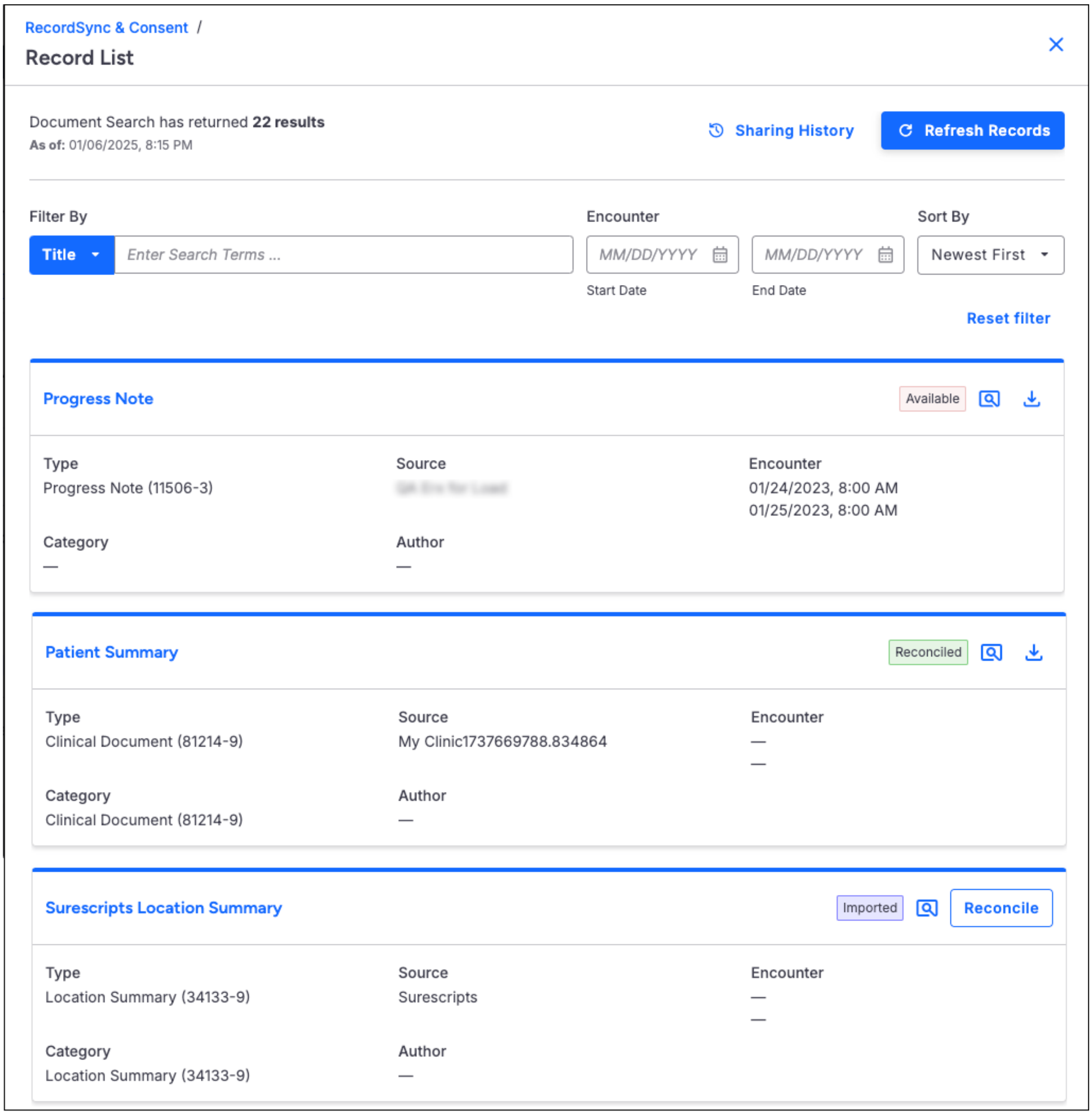
RecordSync

RecordSync bridges critical interoperability gaps by giving providers nationwide access to patient visit histories and clinical documents. With a complete view of a patient's care across different settings, providers can deliver higher-quality care, improve outcomes, lower costs, and increase efficiency.

Now integrated with DrChrono, this powerful tool offers:

- **Real-time access** to comprehensive patient records from multiple facilities
- **Streamlined workflows** that minimize manual data entry and let you focus on patient care
- **No added cost**—these features are included in your current subscription

Knowledge base article

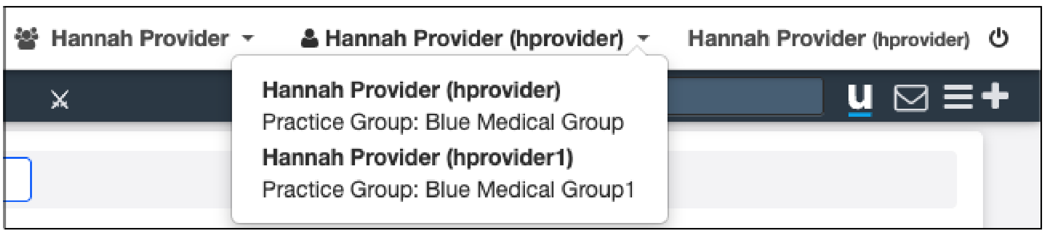


Linked accounts

We are pleased to introduce the new linked accounts feature for providers managing multiple practice groups. Designate a primary account and link additional practice group accounts for effortless switching without separate logins.

To link your accounts, create a support case. Notifications are sent to confirm successful account linking.

Knowledge base article

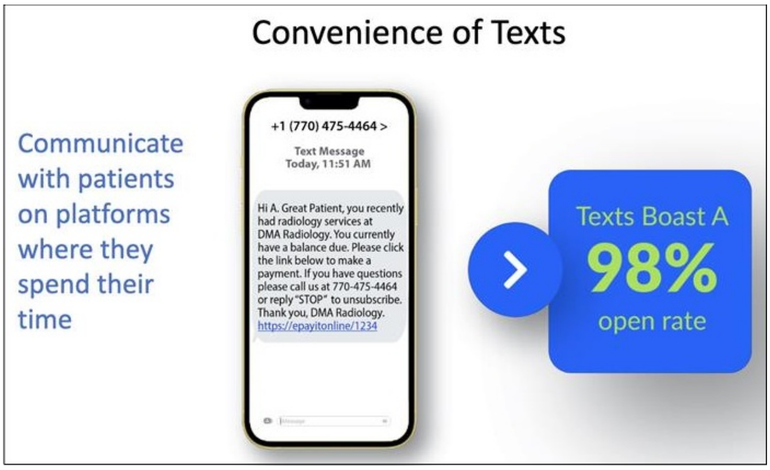


Enhanced delivery of patient statements

We're excited to announce that patient statements can now be sent via:

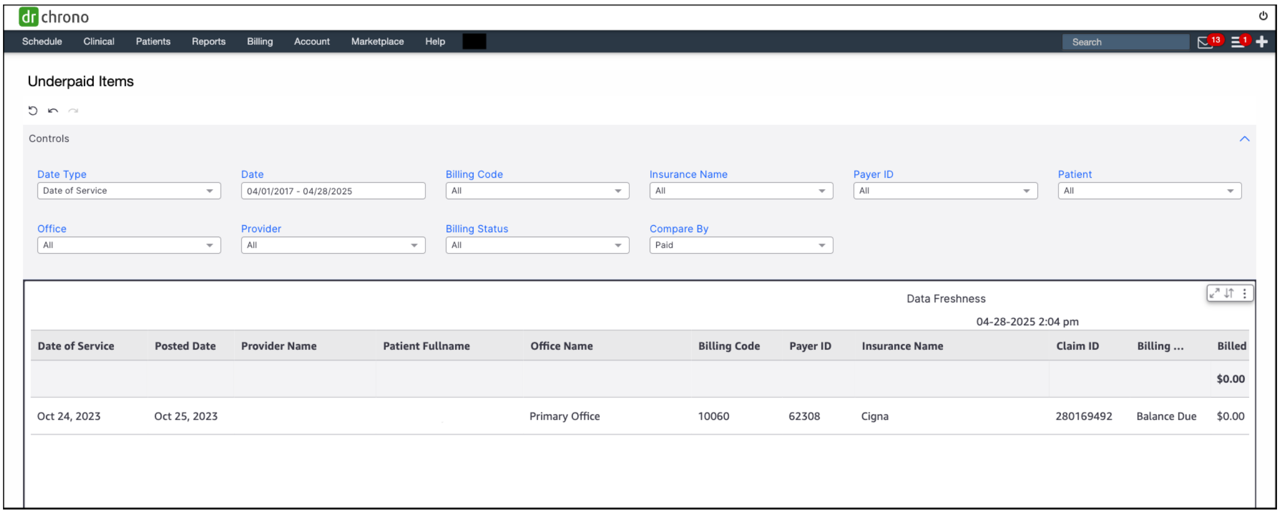
- Text message
- Email
- Traditional mail

These new options are designed to streamline your workflow, boost efficiency, and accelerate patient payments. Ensure patient profiles have updated phone numbers and email addresses to take full advantage of this feature.



Underpaid Items Report

The **Underpaid Items Report** helps you identify claims the insurance payer didn't process at the expected, contracted-allowable amount.



Related resources

- Underpaid Items Report: Overview
- Underpaid Items Report: Running the report
- Underpaid Items Report: Set Up
- Underpaid Items Report: Video

New Settings permissions

We are 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

Practice administrators can remove the new permission for users who need access removed to any of the new areas without impacting their access to other pages.