# Release Notes - July 16, 2025

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## Highlights



DrChrono has transitioned from biweekly to monthly releases to minimize workflow interruptions, enhance code quality, and reduce defects. This change enables us to provide more stable and thoroughly tested updates, while also giving you additional time to adjust to new features. Thank you for your continued trust in DrChrono.

# New features

## 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.

This feature was turned on for all users on June 12.

Now integrated with DrChrono, this powerful tool offers:

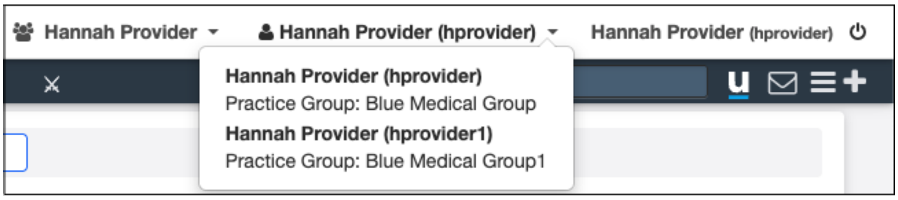
- **Real-time access** to comprehensive patient records from multiple facilities
- **Streamlined workflows** that minimize manual data entry and let you focus on patient care
- **No added cost**—these features are included in your current subscription

Knowledge base article

## Linked accounts in multiple practice groups

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.

Create a support case to turn this feature on for your practice. Notifications are sent to confirm accounts have been successfully linked.




Knowledge base article

# Enhancements

## Access to drug interactions for primary providers

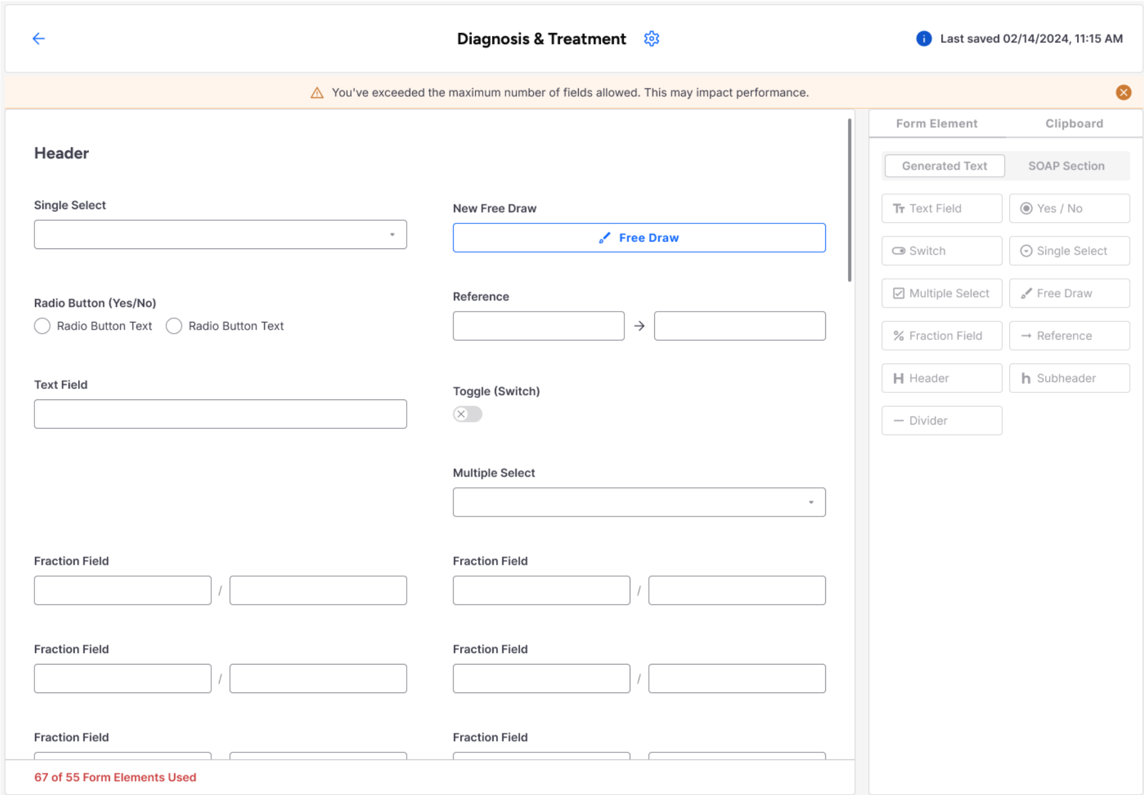
Primary providers have full access to the **Drug Interactions** tab within the patient chart. If you are the primary provider—or a staff member associated to the primary provider—you can view all entered and saved drug interaction data for your patients.

- **Access to comprehensive drug interactions:** Primary providers and their associated staff can see all values inputted in the **Drug Interactions** tab of the patient chart.
- **Supports shared patients:** When the **Share Patients** permission is turned on, providers and staff can view drug interaction data for shared patients.
- **Restricts access:** When the **Share Patients** permission is turned off, providers and staff only have access to drug interaction information for patients for whom they are the primary provider.

## Large forms in Clinical Form Management

To improve performance and usability, the **Clinical Form Management** tool includes warnings for large forms, similar to the legacy form builder.

- **Field count display:** You see a live field count at the bottom of the form, showing the number of form elements used out of the recommended maximum (55 fields).
- **Performance warning banner:** When a form exceeds 55 fields, a warning banner appears at the top of the form alerting users about potential performance impacts.
- **Legacy large forms:** Forms already exceeding the recommended limit show the warning to inform users that they may not load as expected.

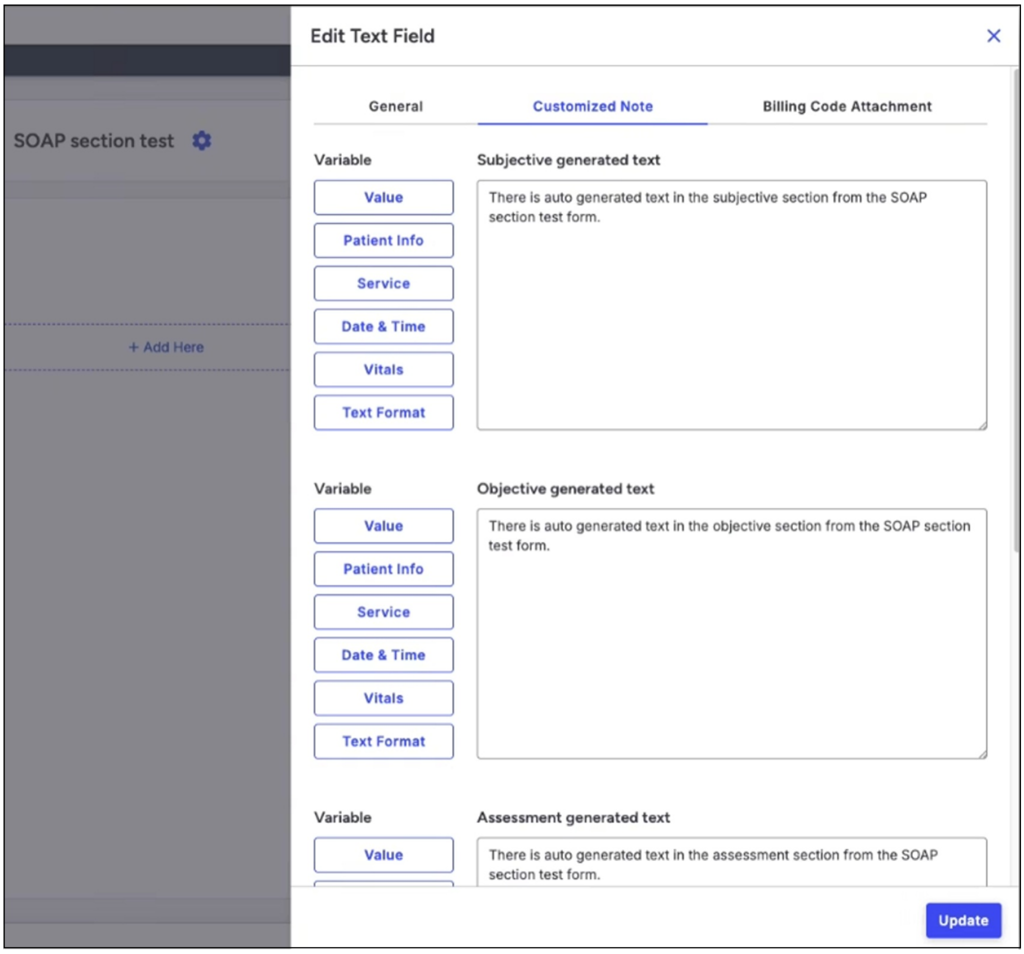



## Set fields as SOAP section items in Clinical Form Management

To ensure full feature parity with the original form builder, we added a **Section Type** toggle button above the text and variable controls to **Clinical Form Management**. You can choose between **New Section** (default) and **SOAP Section** when you create or edit clinical forms.

Based on your selection, the customized note dynamically shows:

- **New Section** > One generated text field
- **SOAP Section** > Four generated text fields: Subjective, Objective, Assessment, and Plan




In the **Form Setting** window, we added the new **Set all Sections to SOAP** toggle switch.

| Set all Sections to SOAP Toggle Switch | Result |
|---|---|
| On | • All form elements in the form act as SOAP section fields.<br>• The **Customized Note** tab includes the full SOAP layout for each section. |
| Off | All elements revert to **New Section** behavior with a single generated text field, but SOAP data is hidden. Previously entered SOAP-generated text appears when you turn the toggle switch on. |

Knowledge base article

## Redirect users to Clinical Form Management from Form Library

You are redirected to **Clinical Form Management** (instead of the legacy **Form Builder**) when you customize templates from the **Form Library** using one of the following workflows:

- **Clinical** > **Library** > **Customize form** > **Accept**
- **Clinical** > **Library** > **Preview** > **Use this Form** > **Accept**

Knowledge base article

## Insurance Payer Mix report enhancements

We enhanced the **Insurance Payer Mix** report with new summary and detail views to provide clearer insights into your insurance revenue. The updated report includes **Summary - By Charges** and **Summary - By Payment** sections, so you can view data by charge or payment activity. You also benefit from improved filtering and breakdowns, including a new **Report Type** selector and more accurate average calculations based on claim count. These enhancements make it easier to analyze payer mix performance across primary and secondary insurance sources.

## New API - Expose signed consent forms from patient charts

We added a new api/signed_consent_forms endpoint to create, update, archive, retrieve, and list signed consent forms by the patient.

## Carisk Partners payer ID E4443

Carisk Partners payer ID E4443 for Securis is available in the DrChrono system. This payer ID can be used for submission of Workers' Compensation and motor vehicle collision claims.

# Resolutions

## Updated message sharing permissions

The PG level permission (**Share Communications** > **Share among all providers in the PG**) must be turned on for the **Access All Messages for Practice Group** permission to allow message sharing.

- If the PG setting is turned off (**Share Communications** > **Do not share communication data**), message sharing is turned off for the practice group regardless of the user's permission.
- If the PG setting is turned on (**Share Communications** > **Share among all providers in the PG**), the user setting dictates whether that user can see messages for the entire practice or just for themselves (plus their primary provider in the case of a staff user).
    - The staff member's unread message count is tied to their primary provider's access.
    - If the primary provider has access to all messages, and the staff member doesn't, the staff member will still see the primary provider's message count.

Knowledge base article

## Password reset improvements

We resolved an issue where an error message appeared during password resets. You can now reset your password and log in without an issue.

## Appointment profile improvements

When scheduling an appointment from the **Doctor** view in the **Calendar**, the appointment profile correctly populates the reason for visit and the color in the **Schedule Appointment** window, regardless of whether the appointment is scheduled for the primary provider or a different provider.

## OnPatient onboarding failed to save

Patients onboarding through the OnPatient portal no longer see the "value not valid" error and can now successfully save their information.

## New providers without an assigned default office couldn't use the Dashboard

Providers can use the **Dashboard** even if they don't  have an office assigned by default.

## Required field indicators were missing in the OnPatient portal on iOS Safari and Chrome

All required fields in the OnPatient portal are marked with an asterisk across all browsers and platforms. If a required field is left blank, the corresponding label and form element are highlighted in red, and the user receives an appropriate error message.

## Clinical note improvements on iPad browsers

We addressed an issue where only the first page of clinical notes was visible when previewing on an iPad browser. You can now see all pages associated with the clinical note.

## Missing OnPatient invitation link in online confirmation emails

The **Sign up for OnPatient** invitation link appears in online confirmation emails.

## Patient Payment Plan report improvements

We fixed an issue that caused complete payment plans to still show when running the **Patient Payment Plan** report with the **Show only Active Plans** filter selected. The report now correctly shows only active plans, excluding any completed payments.

## Text to Pay improvements

We resolved an issue where the **Text to Pay** feature failed to generate or resend a valid payment link in patient text messages.

## Dispute Details tab loading issue

We fixed an issue that caused an error when loading the **Dispute Details** tab in **OnPatient Payments**, impacting your ability to submit dispute evidence.

## Pagination improvements in Messages widget on Dashboard

The pagination for the **Messages** widget doesn't overlap the container boundary when you resize the browser.

## Missing APPS tab from the clinical note

We resolved an issue where the **APPS** tab was missing from the clinical note edit page even when the staff member's primary provider had access to third-party apps.

## Appointment API improvements

Previously, when you changed an appointment status between custom and default appointment status using the API, only the default statuses appeared on the UI. Updates now appear on the UI when you update the status/custom_status.

## Unable to update preferred pharmacies using API

If the NCPDP is valid, the preferred pharmacy reflects what is inputted from the API.

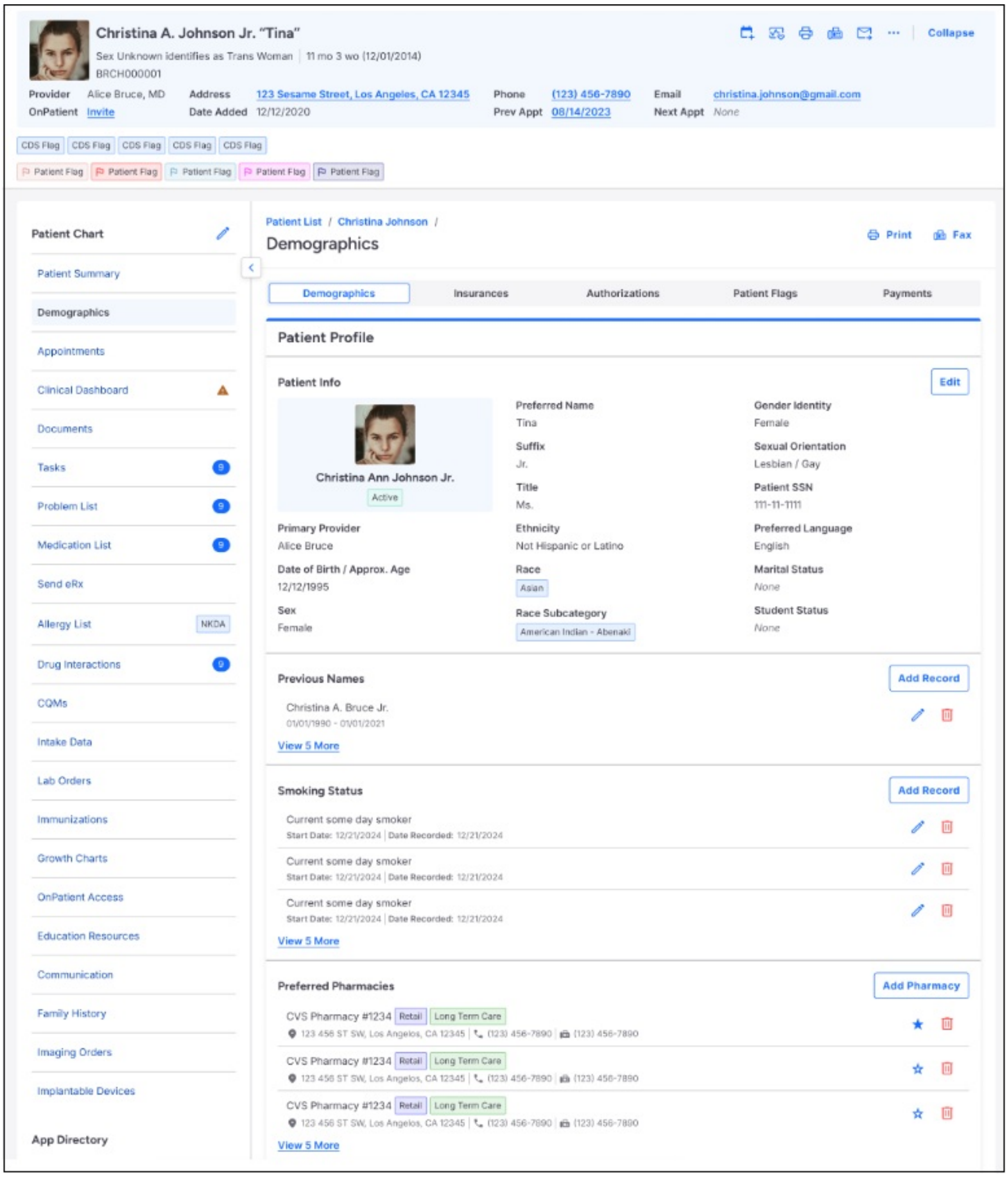
## Updated Billing Log

You no longer receive an error when expanding the **Billing Log** report.

# Coming soon

## Enhanced patient chart demographics

DrChrono has significantly enhanced the **Demographics** experience in the patient chart, boosting user efficiency and data accuracy. With fewer clicks, improved use of screen space, and enhanced visuals, the workflow is faster and more intuitive for providers and front office staff.




## Related resources

- Patient Chart Demographics
- Patient Chart Demographics (Video)

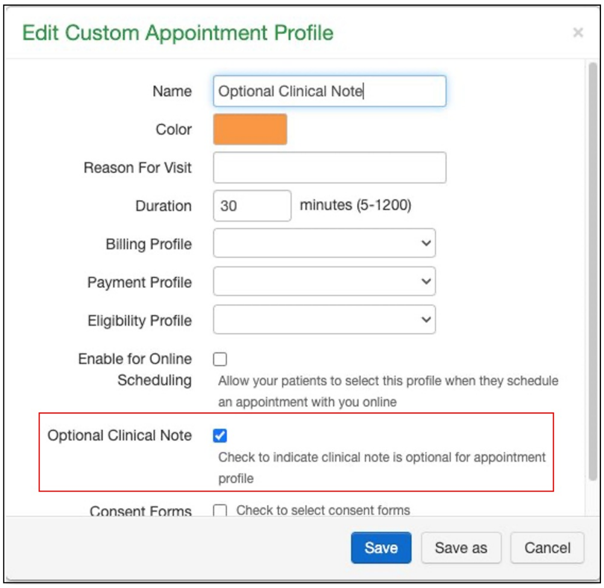
# Exclude clinical notes from an appointment

We're excited to announce a new enhancement designed to give your practice more flexibility and control over billing workflows. You can now exclude clinical notes from an appointment!

This feature allows you to distinguish which appointments have an optional clinical note linked to them using appointment profiles. Providers no longer need to have a mandatory clinical note linked to their appointments.

- Finalize billing and coding without needing completed clinical notes
- Prevent billing delays due to pending documentation
- Accelerate reimbursement and streamline operations

Update any of your practice groups' appointment profiles with the **Optional Clinical Note** checkbox to leverage this new feature, which will begin rolling out to users starting July 21, and be available to all users by August 15.




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.