Release Notes - August 27, 2025

Last modified on 08/27/2025 9:07 am EDT

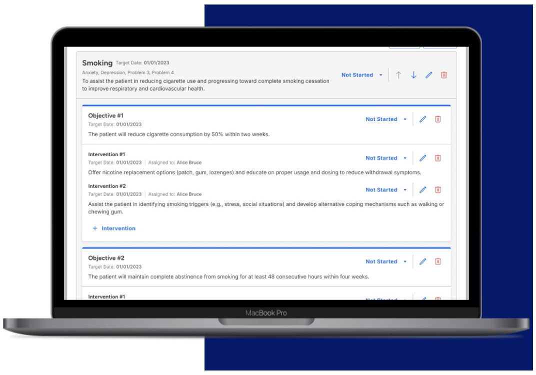
New features | Enhancements | Resolutions | Coming soon

Highlights

New Features	Coming Soon
Patient Care Plan Summary Widget	Patient Chart Demographics

New features

Patient Care Plan Summary Widget



Managing care plans just got a whole lot easier with our new Care Plan Widget, now available right in the Patient Chart for quick, organized access.

Quick and easy Care Plan access

- Instantly view care plans from the Patient Summary
- Editable fields: goals, problems, objectives, interventions, target date, status, and descriptions
- Advanced View features: access to both current and past plans with an audit log to track all changes

Want to be a beta user?

Simply head over to the DrChrono Roadmap Portal and leave a comment to submit your request.

Knowledge base article

Enhancements

Enhanced Statement Delivery Now Enabled by Default

We've made it even easier to manage patient communications! **Enhanced Statement Delivery** is now **enabled by default** for all customers.

This update ensures that patient statements are delivered seamlessly using your configured delivery methods, without requiring additional setup. You'll continue to have full control over your statement preferences in **Settings → Patient Statements** if you'd like to make changes.

Benefits:
- Automatic activation — no manual setup required
- Faster, more reliable patient statement delivery
- Consistent communication aligned with your existing configurations

No action is needed on your part — you're all set!

Enhanced Financial Transaction Screen

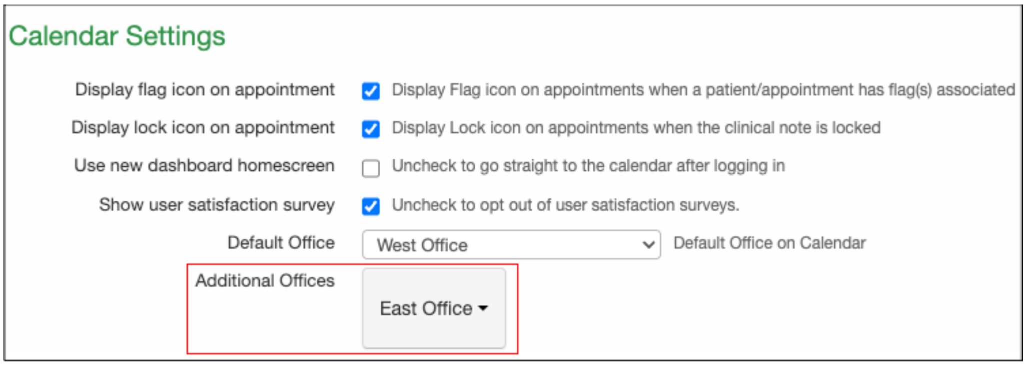
We've improved the **Financial Transaction screen** to give you greater visibility into your billing activity. Instead of displaying transactions under broad categories, the screen now breaks them down into more detailed views, making it easier to distinguish between insurance- and patient-related activity.

What's new:
- **Clear categorization** of self-pay vs. insurance charges, payments, and adjustments.
- **New "Transfer" category** to track balance movements to secondary payers or patients.
- **Reduced manual effort** by eliminating the need to cross-check multiple reports for reconciliation.

New Additional Offices dropdown in Account Settings

Providers can now add or remove the offices they are associated with using the new **Additional Offices** dropdown in **Account Settings** > **General**. Archived offices do not appear in the dropdown. Any changes made here is automatically reflected on the **Offices** page (**Account** > **Offices** > **Edit** (for a specific office) > **Providers** tab).

While this update is currently focused on allowing providers to indicate their office affiliations, it also lays the groundwork for the future ability to limit provider availability by office. At this stage, it's purely a UI update to give providers the opportunity to set their preferences ahead of that transition.

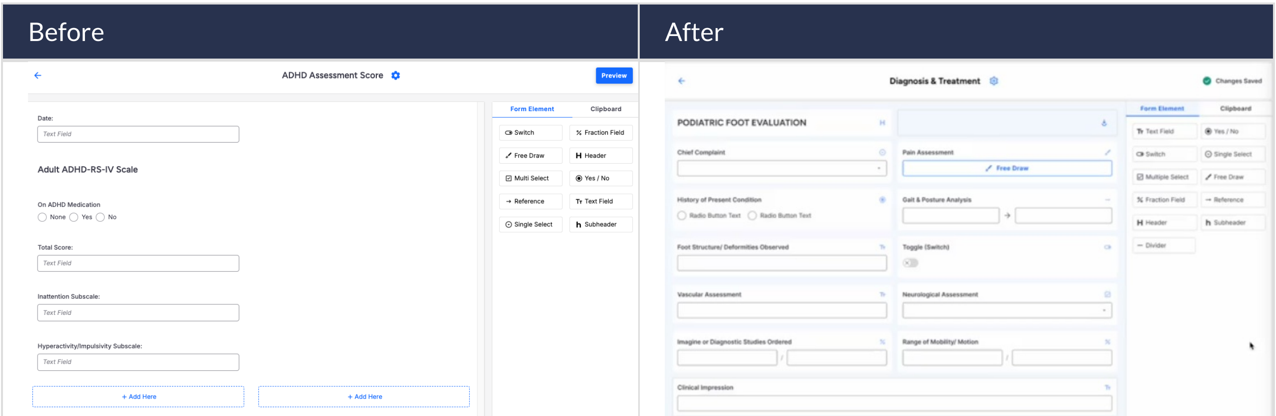


Audit Log timestamp improvements

The **Audit Log** timestamp reflects the time zone of the logged-in user.

Clinical Form Management update

We've updated the Clinical Form Management feature to reduce excess white space and improve the overall layout. The new design includes added color and visual contrast to better distinguish between different form elements, making the editor easier to navigate and use.



New image size options for Free Draw in Clinical Notes

You can now resize free draw images in clinical notes to better fit your PDFs. Choose from preset sizes—Actual, Extra Small, Small, Medium, Large, or Extra Large. Images set to Actual size will appear as originally uploaded but will automatically scale down if too large for the page. These size options are set in the form builder and apply to all images in the free draw field. The feature will gradually roll out beginning 9/2/25, and will be available to all users by 9/23/25.

Knowledge base article

Resolutions

OnPatient password reset emails weren't sent to patients

We fixed an issue where OnPatient password reset emails failed to send to patients. Patients now successfully receive password reset emails.

DSM codes on all three billing screens

We fixed an issue on the Billing Details screen where the reordering option disappeared whenever a DSM code was added, either by itself or alongside an ICD-10 code. The reordering option now remains available as expected.

Missing name and card information on receipts

We resolved an issue where receipts for Stripe payments were missing the "Name on Card" and card number details. Receipts now display this information correctly.

Timely Filing Letter not generating as expected

We have fixed an issue that previously prevented Providers from creating Timely Filing Letters due to an error. This has now been resolved, and the Timely Filing Letter can be generated successfully to support appeals for claims denied due to exceeding the timely filing limits.

Knowledge base article

Dropdown label in Post Widget

We resolved an issue with the Post Widget dropdown on the Dashboard. Previously, when selecting “90 days” or “120 days,” the data filtered correctly, but the dropdown label continued to display “30 days,” creating confusion. The dropdown label now updates properly to reflect the selected date range.

Payment Membership plans not listed

We resolved an issue where membership plans added to a patient’s chart did not appear in the patient’s demographics under the Membership section, causing confusion. Membership details now display correctly in the demographics section, in addition to being reflected in Reports > Patient Payment Plan.

Start Video Visit button showed as active two to three hours before appointment time

We fixed an issue where the **Start Video Visit** button appeared active two to three hours before the scheduled appointment time. The button now becomes active 30 minutes before the appointment and is disabled 30 minutes after the appointment.

Appointments added to provider's calendar not syncing to Google Calendar

We addressed an issue where new appointments added to the provider's calendar didn't sync promptly or reliably with their Google Calendar. The sync delay ranges from 10 minutes to several hours, which is due to Google Calendar API limitations, not a DrChrono issue.

Duplicate lab test names in patient chart

We fixed an issue in the patient chart where duplicate lab test names appeared in the**Lab Results** tab of the **Documents** section, causing confusion. Now, only one row per lab panel/test is shown, rather than one per individual value.

Task created from patient chart didn't appear in patient chart

We fixed an issue where tasks created from a patient's chart didn't include the patient’s name, causing them not to appear in the patient chart **Tasks** section. Now, when a task is created from within an open patient chart—regardless of which tab is active—the patient is correctly linked, and the task appears in their **Tasks** section.

Audit Log page navigation improvements

We fixed an issue where the bottom page navigation incorrectly routed users to page one instead of moving forward or backward by one page. Pagination now works as expected.

Audit Log filter improvements

We fixed an issue where applying Audit Log filters would reset the date picker and other filters. Filters now retain their values as expected.

Only first preferred pharmacy was saved in API POST request

We fixed an issue where only the first preferred pharmacy ID is saved when adding multiple preferred pharmacies using the API. All pharmacies in the POST request are now retained.

Appointment time in Calendar didn't match the time in the patient chart

We fixed an issue where appointment times on the **Calendar** differed by one hour from those in the patient's chart under the **Appointments** section. The **Calendar** now correctly displays appointment times based on the provider's time zone.

Sorting Clinical Notes by Date

We've resolved an issue that prevented sorting clinical notes by date in ascending order. Now, when you click the "Date" column header, your clinical notes (SOAP reports) will reorder correctly.

Patient Chart Problem List

We fixed an issue where new problems were added in the middle or bottom of the problem list. Now, new problems that are added will show up at the top of the list for easier access.

Related resources

Patient Chart Problem List

Patient Chart Problem List (Video)

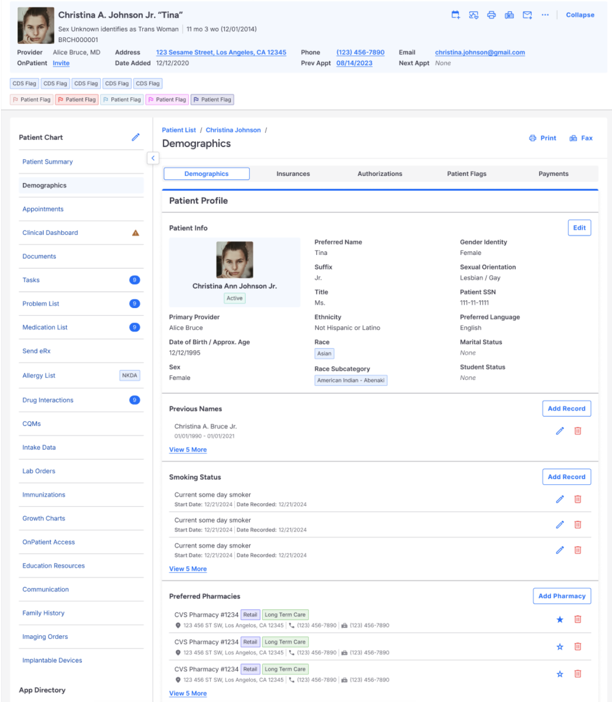
Copy Previous Note Function

We resolved an issue where the **Copy Previous Note** feature displayed an error instead of copying the note. It now correctly copies all data from the selected previous note as expected.

Additionally, if the clinical note is for an appointment within the month-end closing timeframe and the user chooses to copy forward the billing section, any billing codes already appended to that appointment before the month-end closing date will be preserved. These existing billing codes will not be overwritten.

Coming soon

Patient Chart Demographics



We're excited to announce improvements to Patient Chart Demographics will be rolling out soon. These improvements are designed to boost user efficiency and data accuracy.

Here’s what you can expect:

- **Fewer Clicks**: Quickly access the information you need with a more streamlined workflow.
- **Smarter Layout**: A more compact, efficient design means you’ll see more at a glance.
- **Refreshed look and feel**: A cleaner, more intuitive interface makes navigating easier than ever.

Related resources

- Patient Chart Demographics
- Patient Chart Demographics (Video)