Release Notes - October 23, 2025

Last modified on 10/08/2026 7:30 pm EDT

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Highlights

New Features
Patient Chart Header updates
Intelligent claim rejection messages
Enhanced Statement Delivery updates
PayConnect

Coming Soon
Improved Patient Chart Documents
Clinical Form Management Preview Mode
Enhanced Text Editor for forms
No Show Predictor
Multiple Dashboard Views
ePS real-time claim submission

New features

Patient Chart Header updates

- ⚡ **Compact and fast**: Key patient details are now easier to access.
- **Insurance information**: Hover over the primary or secondary insurance to see the insurance ID and group number.
- **Preferred pharmacy**: Manage preferred pharmacies directly from the preferred pharmacy link.
- **Easier payment collection**: Select the patient balance to send a Text to Pay or collect payment instantly.

Patient Chart Header

Intelligent claim rejection messages

We are introducing an AI-powered enhancement to make claim rejections easier to understand. For customers using the ePS Clearinghouse, rejection messages will now be displayed in clear, simplified language—helping you to quickly identify issues and take action.

Feature rollout begins on October 27, with full availability by October 31.

Intelligent Claim Rejection Messages

Enhanced Statement Delivery updates

We made it even easier for patients to view and pay their statements. **Enhanced Statement Delivery** is 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 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

Enhanced Patient Statement Delivery

PayConnect

DrChrono PayConnect simplifies the setup of **DrChrono Payments** by offering a straightforward and efficient way to activate payment processing. Your practice can accept patient payments with ease while minimizing administrative hassle. With **PayConnect**, the enrollment process is streamlined to help you quickly integrate secure payment solutions into your workflow, enhancing both operational efficiency and patient satisfaction.

DrChrono Payments: PayConnect

Enhancements

New save functionality for Calendar filters

We introduced a **Save Changes** button to improve how filters are applied in the **Calendar** (for both the provider and office filters).

Key updates include:

- The calendar no longer refreshes automatically when filter selections are made.
- A helper message—"There are unsaved selections"—appears above the button to alert users.
- Selecting **Save Changes** applies the selected filters to the calendar.
- Once saved, the helper message disappears.
- All filters continue to work as expected, but you must now manually confirm changes for them to take effect.

This update gives users more control and prevents unintentional refreshes during filter selection.



📖 Filter Calendar Views by Provider or Office

Telehealth session flexibility and continuity improvements

We extended the timeframes for joining and reconnecting to video appointments.

- **Join time window extended:** The **Start Video Visit** and **Join Video Call** buttons are available 30 minutes before the appointment's scheduled start time, and remain active for up to 150 minutes after the scheduled appointment end time.
- **Session reconnection:** If a user disconnects, they can rejoin within five minutes to continue the session uninterrupted.
- **End of session timing:** The telehealth session room remains open until five minutes after both the provider and patient have left.
- **Benefit:** Allows for additional flexibility for the practice to conduct telehealth visits and avoid having to modify or create new appointments to see a patient.

📖 Telehealth Visits FAQ

EHI export file enhancements

> Many of these fields will be rolled out before December 31, 2025 and will **not return data** until they are actively used by practices.

We made the following updates to the electronic health information (EHI) export to improve data completeness, accuracy, and standardization **across both single-patient and practice-level exports**.

New patient occupation fields

You can now add occupation details to a patient's chart, including:

- **Occupation** (required) – Select from a searchable list
- **Industry** – Select from a searchable list
- **Start Date** (required) – Job start date
- **End Date** (optional) – Job end date

These fields appear in a new drawer when you select **Add Record**.

Export updates:

- The demographics.csv file now includes these fields.
- If no occupation information is entered, the fields appear blank.
- All existing fields in the export remain unchanged.

📖 Creating a New Request: EHI Export

Care Plan data included

A new care_plan.csv file is now part of the export.

- **Single-patient export:** Includes care plan data specific to the selected patient.
- **Practice-level export:** Includes one or more numbered care_plan.csv files with care plan data for all patients in the practice. Files are automatically numbered if needed (for example, care_plan_1.csv, care_plan_2.csv) to handle larger exports.

Care Team data included

A new care_team.csv file captures patient care team information:

- **Single-patient export:** Contains only the selected patient's care team entries.
- **Practice-level export:** Includes one or more care_team.csv files, containing care team data for all patients in the export. Files are automatically numbered when needed (for example, care_team_1.csv, care_team_2.csv) to support large exports.

Added imaging order LOINC field

The patient_imaging_order.csv file now includes a LOINC code field to standardize and identify imaging order types across systems. This new field supports better consistency and interoperability of imaging order data across systems.

Added tribal affiliation data

A new CSV file includes tribal affiliation details linked to each patient—tribal code and name—when available. The file is empty if no affiliation is recorded. This data helps ensure demographic data is more complete and accurately reflects patient-reported information.

Added pronoun field

Patient pronouns, when recorded, are now included using standardized codes in the demographics data. The field is blank if no pronoun is selected. This update supports more inclusive and personalized patient records.

Updated sexual orientation codes

Sexual orientation codes now reflect the latest standards for improved accuracy and consistency in exported data.

Updated sex field codes

The sex field in the demographics.csv file now uses updated, standardized codes to ensure alignment with current data practices.

Expanded ethnicity options

New ethnicity options are now available in the demographics.csv file, ensuring more comprehensive representation of patient demographics. Existing data fields remain the same and continue to work as usual.

Expanded Problems List fields

New fields have been added to the problems.csv file, including:

- Problem status (for example, recurrence, remission)
- Verification status (for example, confirmed, provisional)
- Problem types (for example, Social Determinants of Health, Disability Status)

All existing data continue to be included and work as expected.

Added allergy verification status

The new **Verification Status** field is now included in the allergies.csv file to indicate the status of each recorded

allergy (for example, Confirmed, Refuted, Entered-in-error). These updates enhance the completeness, usability, and interoperability of patient data exports.

📖 Single Patient and Bulk Export File Folder Contents (EHI Export)

Organization NPI field added to the Organization Profile page

You'll now see a new **Organization NPI** field on the **Organization Profile** page. This number is important for **RecordSync** and is required going forward. When available, it will automatically pre-fill with your **Billing NPI**. If not, you'll need to enter it manually. The system will validate the number to ensure it's active and valid.

Customers can update this information in **Account > Organization Profile** so that **Surescripts** has the correct address and Organization NPI on file.

📖 Set Up RecordSync

COVID-19 vaccine NDC codes

We included additional NDC codes for the updated COVID-19 vaccines to DrChrono, which can be included in your fee schedule and patient claims.

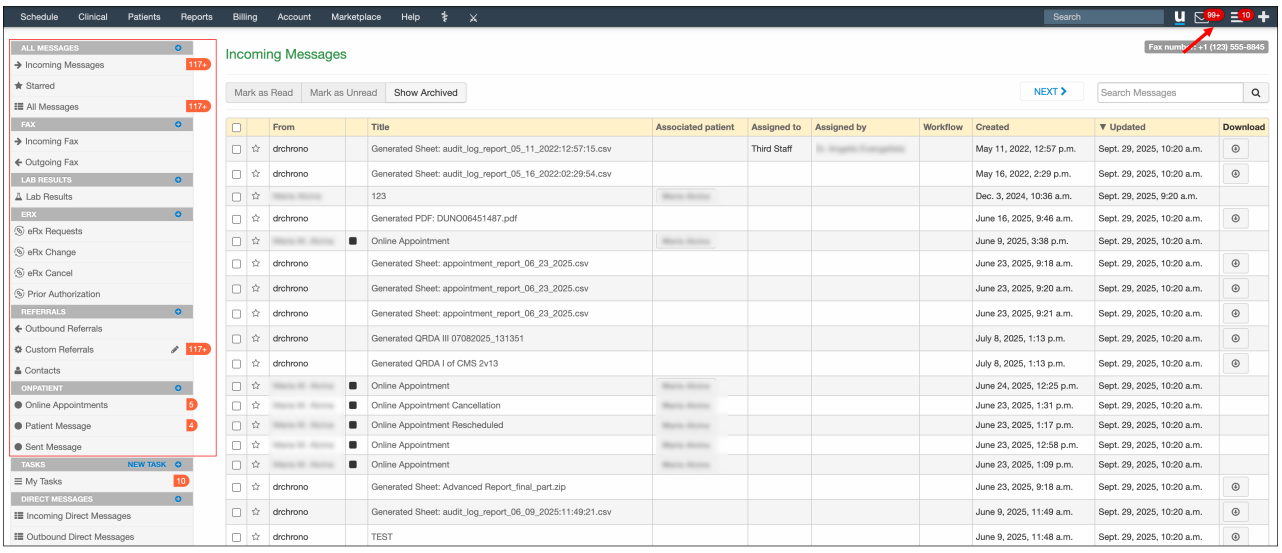
Resolutions

Telehealth video and session logging

We fixed an issue, when initiating a few telehealth sessions, that prevented patients and providers from seeing each other during video visits. The system now also logs when both participants join the session, ensuring accurate audit trails.

Message Center unread message count

Unread message counts now display correctly in both the **Message Center** notification and the side panel.



Custom appointment statuses in the Appointment Status

Dashboard dropdown

Custom appointment statuses now appear as expected in the **Appointment Status Dashboard** dropdown, alongside default statuses.

Active Medication List updates

We fixed an issue where certain prescriptions—such as Quetiapine 400 mg oral tablet—showed as successfully sent in the **Prescription Log**, but didn't appear in the patient's **Active Medication Orders**. Prescriptions now reliably appear in the patient's **Active Medication Orders** once sent.

Clearer message for large clinical notes

If a clinical note is too large to render as a PDF, the system now alerts you when a note exceeds the size limit—no more server errors.

Referral PDF procedure code sorting

Procedure codes in referral PDFs are now sorted chronologically by month and year.

Patient statements

Newly added appointments and charges now display properly in the itemized table.

🛤 Coming soon

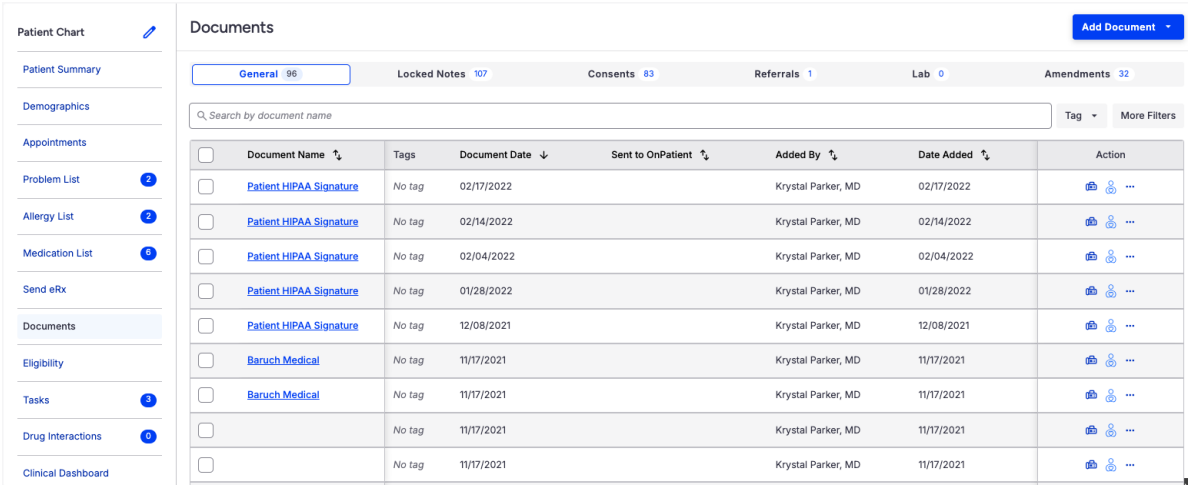
Improved Patient Chart Documents

We're updating the **Documents** section in the patient chart to help you work more efficiently.

- 🔍 Advanced sorting and filtering to quickly find documents
- 🏷 Improved tag management for better organization
- ⚡ Faster batch actions, including multi-document faxing
- 🧪 Redesigned **Labs** section for easier navigation of requisitions and results.

These enhancements make it faster to organize and access patient information—so you can stay focused on care.

📖 Patient Chart Documents



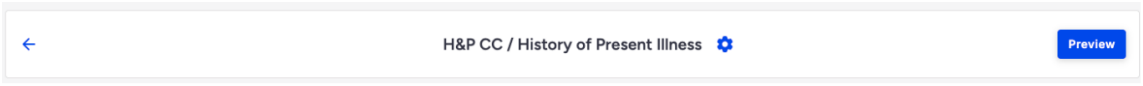
Clinical Form Management Preview Mode

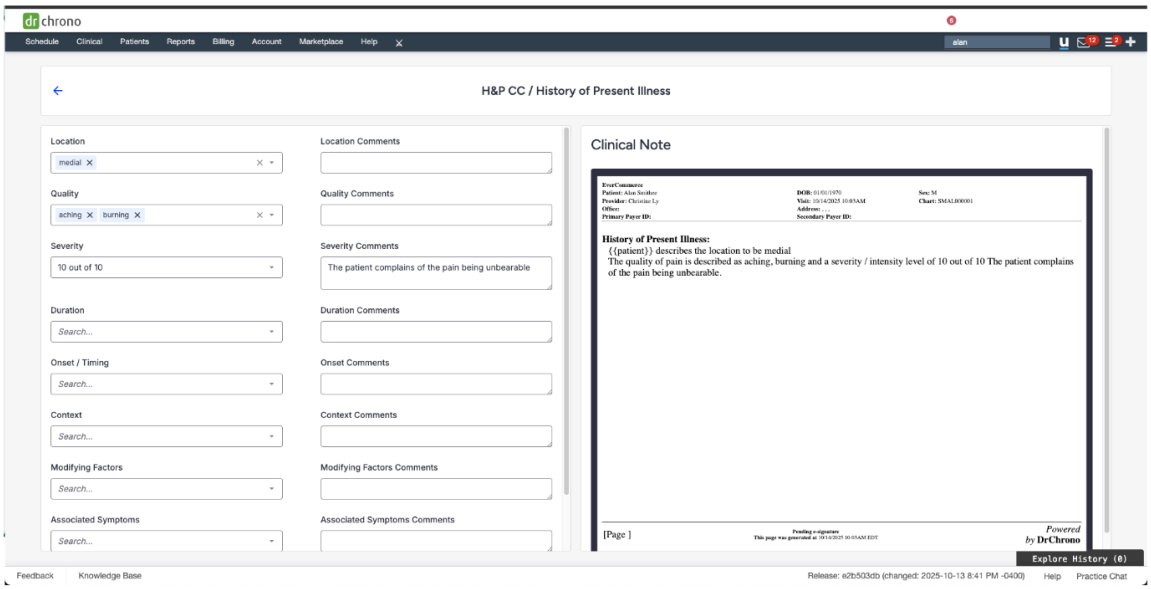
Experience a smarter way to build and review your clinical forms. The new **Preview Mode** in **Clinical Form Management** lets you interact with form elements live—seeing exactly how input values affect the form and the generated clinical note PDF in real time.

This update improves accuracy and efficiency when creating and reviewing forms.

 Feature rollout begins on October 28, with full availability by November 25.

📖 Clinical Form Management

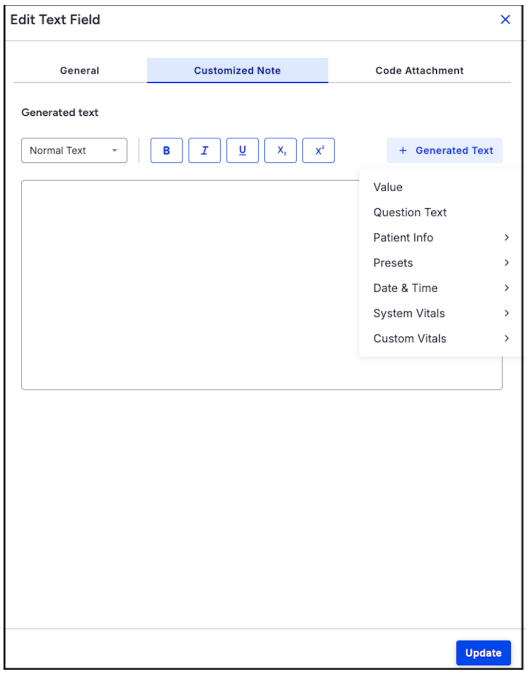




Enhanced Text Editor for Forms

We're rolling out a new, easy-to-use text editor that lets you format your notes with styles like headings, bold, italics, underline, and more.

 Feature rollout begins on October 29, with full availability by November 25.



No Show Predictor

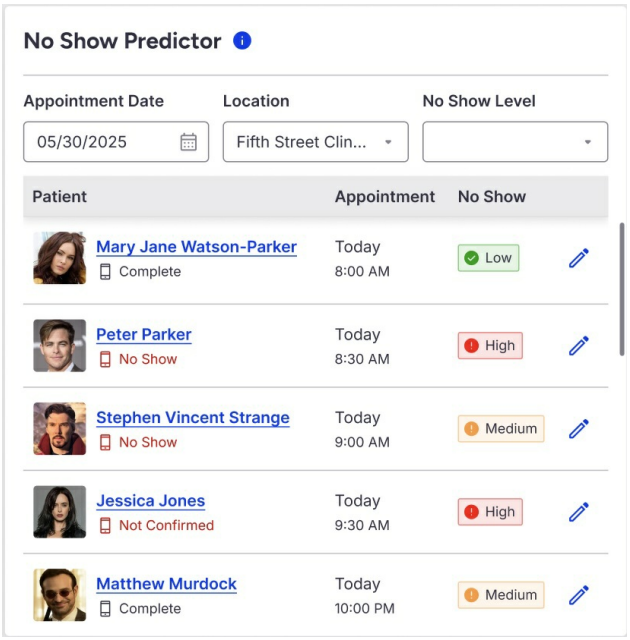
No Show Predictor uses AI to assign a risk score to each upcoming appointment, helping your practice identify which upcoming visits are most at risk of a no-show.

This score displays on the **No Show Predictor** widget on the **Dashboard**, giving your staff clear visibility into potential no-shows and allowing for proactive outreach.

Key benefits

- **Reduce lost revenue:** Minimize empty appointment slots by identifying and addressing high-risk appointments.
- **Improve care continuity:** Ensure patients receive timely care by identifying those most likely to miss visits.
- **Optimize staff efficiency:** Focus outreach where it matters most instead of calling every patient.
- **Boost patient engagement:** Use personalized reminders or rescheduling strategies for at-risk patients.

 No Show Predictor



Multiple Dashboard Views

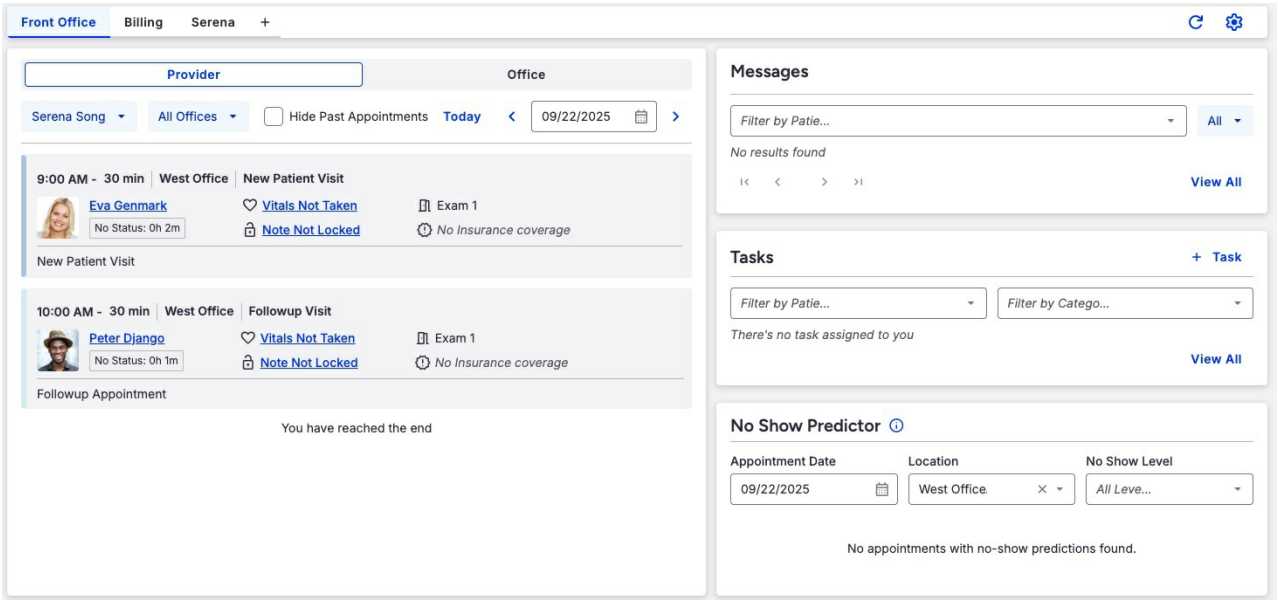
Create multiple, customized **Dashboard** tailored to different work roles, offering your team greater flexibility and focus.

- **Front office:** Daily view highlighting schedules, patient check-ins, open tasks, and unread messages to efficiently manage patient flow.
- **Billing staff:** Financial view to monitor outstanding claims, denials, and account balances—no extra navigation needed.
- **Providers:** Personalized dashboards focusing on their schedules, clinical tasks, and incoming messages, so they always have critical information at their fingertips.

Customize your **Dashboard** to match how you work and what matters most.

Multiple Dashboard Views

Feature rollout begins the first week of November, with full availability by mid-December.



Insurance Waterfall Report

The **Insurance Waterfall Report** provides a detailed view of how payments are collected over time following charge generation. This enhancement helps providers assess cash flow timing, monitor payment behavior, and identify trends in reimbursement by visualizing payments by month and quarter. With filtering, drill-down, and export capabilities, you can easily analyze payment performance across providers, offices, and payers.

Related resources

- Insurance Waterfall Report
- Insurance Waterfall Report (Video)

ePS real-time claim submission

We improved the claim submission process for eProvider Solutions (ePS) to provide faster turnaround times and greater reliability. Claims can now be submitted individually to the ePS clearinghouse through an integrated API endpoint—similar to our real-time eligibility (RTE) process.

This enhancement:

- Allows each claim to be transmitted as soon as it reaches billable status, significantly reducing submission delays.
- Ensures a smoother, more efficient claim submission process, helping your practice receive clearinghouse responses much faster.

eProviderSolutions (ePS) Claim Submission

New feature video overview

Get ready for exciting updates! This month's release is packed with powerful new features designed to elevate your workflow.

Watch our demo to see the latest enhancements in action and discover how they can boost your productivity and improve your practice experience.