

DrCloudEHR™ April Release Notes

Release to Staging Site – March 26, 2023 Release to Production Site – April 02, 2023

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Overview

This document contains the Release Notes for April 2023. Upon receipt, please review and test these changes in your Staging Site as soon as possible. The updates may have different effects, depending on your configuration. Use the following tags to understand the impact of the updates on your site:



Available to all users when released



Some setup is required after the release



Dependent on the activation of other feature(s)



Requires purchase and additional setup

Please note, the terms *client*, *patient*, and *individual* are used interchangeably throughout this document depending on the nature of the feature.

If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at <u>support@drcloudemr.com</u>.

Practice

Added support for multiple diagnoses to Claim rules

Core

Now Authorized users can configure Claim rules for multiple diagnoses and alert the user when a claim is generated and submitted when the CMS-1500 claim form is missing the number of diagnoses captured in the rule.

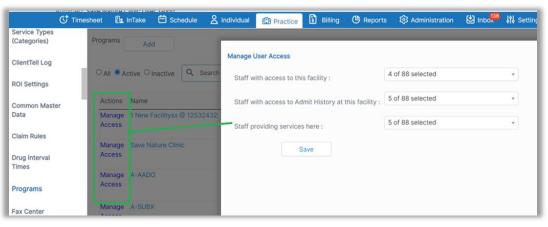
Billing Rules	Provider PIN#	Provider PIN#	Provider ID Ignore, Generate Clai	m 🗸	Missing Provider PIN
Settings	Supervisor LName	Supervisor Last Name	Supervisor Last Name Generate Clai		Missing Supervisor Pr
	Supervisor FName	Supervisor East Name	Supervisor First Name Ignore, Generate Clai		Missing Supervisor Pro
Batch Closing/Reopening	Supervisor MiddleInitial	Supervisor Middle Initial Name	Supervisor Middle Initial Ignore, Generate Clair		Missing Supervisor Pr
Encounters	Supervisor NPI	Supervisor NPI	(Supervisor NPI) (Ignore, Generate Clair	m 🗸	Missing Supervisor Pr
Service Types	Supervisor UPIN	Supervisor UPIN	Supervisor UPIN Ignore, Generate Clai	.m 🗸	Missing Supervisor Pr
(Categories)	CLIA Code	CLIA Code	Facility Domain Identifier Ignore, Generate Clai	.m 🗸	Missing CLIA Code
	OTHER CHECKS	Is Service Location a Billing Location	(ser) Ignore, Generate Clai	m 🗸	Invalid Billing Facility
ClientTell Log	OTHER CHECKS	Does it have non billable services?	Check Non Billable Services Notify Staff, Generate	e Claim 🗸	Encounter has non bi
ROI Settings	24J1	Rendering Physician Taxonomy	Rendering Physician Taxonomy Notify Staff, Generate	e Claim 👻	Missing Rendering Ph
	NA	Compare Renderring Provider NPI(24J) And Billing Provider NPI(33a)	(Ignore, Generate Clair	m 🗸	Missing Comparision
Common Master Data	NA	Compare Renderring Provider NPI(24J) And Provider PIN#	Ignore, Generate Clai	m 🗸	Missing Comparision
Data	NA	Compare Provider PIN# And Supervisor NPI	(Y) Ignore, Generate Clai	.m 🗸	(Missing Comparision
Claim Rules	NA	Billing Rules	CPT4:92507(Telehealth Mod 95) Edit	m 🗸	(Missing HCFA Billing
Drug Interval	24D	Apply Billing Rules	Apply Billing Rules Ignore, Generate Clai	m 🗸	Missing applying billing
Times	21	Minimum Diagnoses Per Service	2 Notify Staff, Do Not C	enerate Claim 🗸	(Missing Diagnosis C
Programs	24E	Diagnosis Count	Diagnosis Count Ignore, Generate Clai	m 🗸	Not Sufficient Diagn

Note: The system checks for all the service codes, if a service code doesn't have sufficient diagnosis codes (justification), then it will not create the claim for that encounter.

Ability to assign admit history, access, and service facilities in one interface when adding new facilities

Core 🌼 Setup

DrCloudEHR now includes a **"Manage Access"** link on the Facility/Programs administration page to easily assign staff access to admit history, facility, and services for multiple users at the same time.



Billing

Added the ability to review/edit/submit claims from the denials manager

Core

Authorized users can now **"Save & Submit"** the claim from the Denials Manager itself. Also includes a **"Clear Claim"** option to remove the claim from the denials queue.

24. A.		в.	с.	D. PROCEDURES	, SERVIC	ES, OR SUPP	LIES	E.	F.	G.	н.	I.	J.
DATE(S) OF SERVICE From: To:	I	Place Of Service	EMG	CPT/HCPCS	A	MODIFIE B C		DIAGNOSIS POINTER	\$ CHARGES	Days Or Units	EPSDT Family Plan	ID QUAL	RENDERIN PROVIDER 1 #
DC Qual: N4 NDC Code: NDC Qty: NDC Meas:													
2023-02-01													
5. FEDERAL TAX I.D. NUMBER SSN EIN O C PATIENT'S ACCOUNT 27. ACCEPT 28. TOTAL CHARGE 29. AMOUNT PAID 30. Rsvd for NUC ASSIGNMENT? SO C PATIENT'S ACCOUNT ASSIGNMENT? SO C PATIENT'S ACCOUNT ASSIGNMENT? SO C C PATIENT'S ACCOUNT ASSIGNMENT? SO SO C													
Date Of Initial Treatment:	2023-02-01			32. SE	RVICE FAC	CILITY LOCA	TION AND I	VFORMATION	33. BILLING PRO	VIDER IN	FO. & PHC	ONE #	
Date Last Seen:	2023-02-01	128		Progra	im Name	A-SUBX			Billing Pro	vider: 🔟	NEW FACILI	TYSS 12	5324
Supervising Physician: (Last, First, MI)					City	CANOGA PA	RK			City: M			
Supervising Physician NPI:					State	CA Zip:	91303			State: CA	Zip: 1	2123	
Supervising Physician ID:	pervising Physician ID: Billing Contact												
Pay-To Address: PLOT NO 2-0-4 Name: Telephone: Telephone: Seecially (MITHEU Seecial													
Ordering Physician NPI:					State	: CA Zip:	12123						
Ordering Physician ID: CLIA:			_						Rendering Pro		DDY	BALAKI	SHOF
Accident Date:									(Last, Firs Provider Spe	cialty: 20	TASQWEQ		
Mammography Certificate:									Provider	DTN # . 98	76543210	(please see bo
Fighting aprily certificate.									Provider	24	J)		
a. NP1: b. Facility ID: a. Billing/Group NP1: b. Billing/Group No.: [12345													
				12340						μ	QUAL:		
				Close	eview X12	2 Save	Submit Cl	ear Claim					

Billed Payer type details are included in the encounter and fee sheet.

Core 🏟 Setup

DrCloudEHR now shows the Billed Payer type e.g., "Billed to Ins1" for primary insurance and "Billed to Ins2" for secondary insurance in the encounter and fee sheet.

Encounte Funding P Type: Com	egal guardianship: 2023-01-03 (100173843) Ht: in Resp: per min Community WPAP Servi Wt: lbs Temp: () °F
	🕔 Timesheet 🗈 InTake 🛱 Schedule 🙎 Individual 🖽 Practice 🚯 Billing
Search Menu 🗶 🞼	2023-01-03 Encounter Finalize Encounter Print Encounter Details Refresh Billed to Ins1
Client Summary Chart	for Think Pad Expand All Collapse All Delete Go to Fee Sheet Log Treatment Time
Client	Client Portal Forms After Visit Summary
Search/Add	Upload Document: Choose Files No file chosen Upload
Administer	Documents attached to this encounter:

Patients

Option to add/configure additional fields to the "Main Search".

Core

DrCloudEHR now provides the option to add/configure up to 10 additional fields for the "Main Search".

Se	arch by: First L	ast Address Ali	as Name PID DO	B Gender			Ø x
•							
dit layou	It: Demographics V						
Add Gi	roup						
Vho		ame Group Delete		Move Down	. Backup	Label Data	Main
Order	ID (?)	Label (?)	UOR Data Type	Size Li	st List	Cols Cols	Search Options
□[1	title	Name	Optional V	~		(1(3	NRB
□(2	fname	First	Required V Textbox	◄ (10		0 0	CDR
](3	mname	Middle	Unused V Textbox	♥ 2		0 0	CR
4	Iname	Last	Required V Textbox	♥ 10		0 0	CDR
4	suffix	Suffix	Unused V Textbox	♥ 30		1 1	
4	alias	Alias Name	Optional V Textbox	✔ 20		1 1	
5	pubpid	External ID	Optional V Textbox	▶(10		(1)(1	
5	previousName	Previous Name	Optional V Textbox	♥ 10		1 1	
6	DOB	DOB	Required V Text-date	~		1 1	DR
	sex	Gender	Required V List box	✓ (st	Y	1 1	NR

Note: At present this functionality is integrated for only existing and new text box fields only.

Ability to re-order ROI Dashboard headers

Core 🏟 Setup

You can now reorder the ROI Dashboard headers to your agency's preference. A new column has been added to assist with identifying the ROI for a program/encounter facility.

* Records in red are revoked and expired ROI's * Records in Client ROI	Identity, dates, diagnoses, prognoses, recommendations, treatment rendered,	Dis	Medical Services, to								
Facility Organization Name/Title Date	assessments, locations, progress notes, treatment status	Treatment, to include Psychiatric/Medication History (past and present)	Medication History and	Family (past and present)	Employment (past and present)	(past and	Legal Involvement (past and present)	Alcohol and Drug Treatment(past and present)	Other	Expired	Revoked
Q 🚔 🐲 🖛 🛛 🜮 10/13/2022	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	<u>Yes</u>	No
۹ کی این این این این این این این این این ای	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No

Ability to close a billed encounter when the accounting period is closed

Core 🏟 Setup

DrCloudEHR now supports closing a billed encounter even when the accounting period is closed. This is configured using a global flag to enable the **"Mark as Closed"** button in batch open/close encounters.

edir dan berlanda kala	ed Search Search with Encounter Number			×
0				Search
Client:	Rendering Provider:		Inactive users	Offline Reports
From Date:	03/09/2023 To Date: 03/14/2023 Erear Funding Source:		•	Mark as Cleared
Facility:	Select Program(s)	(•	Close Encounters
Billing Types:	Billable Billed Status: All	✓ Status : Open	•	Reset Encounters
Service Code:	Clear Service Code Type:	All		Update Contract Amou
	Show Only Re-Opened Encounters			Mark As Closed
	Show only incomplete encounters that are older than 1 hour(s)			
	Show only encounters with '0' contract rates			CSV Export
;+	asheet 🖳 InTake 🛱 Schedule 🙎 Individual 🕮 Practice	Billing 🕒 Reports	ស៊្វ Adm	inistration 🕑 Int
S Time		ariad Only aliniaal inform	ation can b	e edited in the form
	01/30/2023 Encounter (This encounter is of closed accounting)	enou. Only clinical informa	ation can b	
x 💌		illed to Ins1		

Multi-select dropdown for the Provider field in the Service Categories section of MDTP

Core 🎝 Setup

DrCloudEHR now provides two multi-select dropdowns for the Provider field in the Service Categories section of MDTP.

- 1) Administration > Lists > Responsible Roles
- 2) Practice > Administration > User Certification List

bjecti	ive								Remove C
	Obtaile							4	
5	Service Service Types								
	+ Add								
	Name	Service Codes	Provider	Minutes	From		Frequency		Act
	1Good/Best Sessions	y 90281- bg	×BHMP	59	to	22	Per 3 months *	59miuts duration	
			× Case Management	S					11
			× Community/Family						
	1Good/Best Sessions	• 90281-	×BHMP	59	[11] to	22	Per 3 months *	59miuts duration	
		hg	(())						le

Note: The new global flag "Show User Certification List at MDTP - Service Categories - Provider" must be enabled to see the User Certification List.



+ Add Ol Object	tive						Remove Objective
Guide	Objective2					4	
	Service Service Types						
	+ Add						
	Name	Service Codes	Provider	linutes From	Frequency		Actions
	1Good/Best Sessions	90281-hg	×CADC ×Masters ×NPCC	59 11 to	22 Per 3 months *	59miuts duration	<i>≰</i> 2 <i>∡</i>
	1Good/Best Sessions	y 90281-hg	APRN Bachelors	59 11 to	22 Per 3 months *	59miuts duration	20
	ire List:		CAC				
	ures are anything you can track in support of the objective. e.g. Num d Measure	ber of Meetings .	CADC				
	easure Name:	Initial Meas	IND-BHP				Remove Measure

Multi-Disciplinary Treatment Plans (MDTP) visibility based on selected programs and the user's accessible facilities

Core 🏚 Setup

DrCloudEHR now includes an option to configure MDTP access based on selected programs and accessible facilities.

Edit User Save	Cancel		
Profile Access	Settings HR Other Settings	TeleHealth Power BI	Chartmeds
Username: *	yella	Reset Password	Active: 🗹
Stop Prior Author	endar: ☑ Reset Signature ID: □ Enabl ization Notifications: □ Pause the Golden T I Thread Email Notifications: □		
Access Control:	Admit Discharge, Clinic Admin 🔹		
	Available Facilities		Selected Facilities
	1 New Facilityss @ 12S32432		KYR Superspeciality Hospital
	111Best/Great-Clinic	>>	NIMS
	A-AADO		
Accessible	A-SUBX	>	

Under a le Encounter Funding Pi Type: Com	(10028) DOB: 03/05/200 gal guardianship: YES History Chart ovider: ANTHEM BLUE CRO mercial Insurance Co.	New Encounter Develops OF CA ⁶⁹ Code	ent Encounter: 9/2023 (10017502 reat/Good Ind Ap lopmental Evalua. status: ppointment	1) Ht	: / mmHg Pulse: per min ③ : in Resp: per min : ibs Temp: 0 *F BM: 0 kg/m ² BAC: %								
		C Timesheet	inTake 🗎	Schedule 2	Individual 🚯 Practice	Billing	C Reports	8 Administration	🔛 Inbox 🙆	👪 Settings	🚇 ADL	Unplug:Server	
<u>(x)</u> (+)	Multidisciplinary Treatm Select a Plan or create a r Add Plan	new plan.											
	Plans	Program(s)	Start Date	End Date Active	Visits	Created Da	te Actions Ava	lable					Supervisor Review Details
et		Developmental Evaluation KYR Superspeciality Hosp		3 Yes		• 03/09/202	3 Edit Plan	Add Progress	Deactivate Plan	Duplicate	Print Plan	Request Client Signature	Awaiting Supervisor Review
	Inpatient	NIMS	03/09/202	3 Yes		• 03/09/202	3 Edit Plan	Add Progress	Deactivate Plan	Duplicate	Print Plan	Request Client Signature	Awaiting Supervisor Review
	Inpatient	KYR Superspeciality Hosp	ital 03/07/202:	Yes		• 03/07/202	3 Edit Plan	Add Progress	Deactivate Plan	Duplicate	Print Plan	Request Client Signature	Awaiting Supervisor Review
	Clinical - in office	KYR Superspeciality Hosp	ital 11/28/2022	Yes	Select Previous Progress	• 11/29/2022	Edit Plan	Add Progress	Deactivate Plan	Duplicate	Print Plan	Request Client Signature	Awaiting Supervisor Review



Reports

Added support to clear amounts due when billed to primary, if secondary billing is not needed.

Core 🏟 Setup

Authorized users can now clear the amount due once primary payer is billed and billing to secondary payer is not needed.

visits -	Mar	nage Column(s	;)												
Appointments	Tota	Total Number of Encounter(s): 11													
and Encounters		Date	Client	DOB	PID	Enc #	Facility	Service Code(s)	Funding Source	Funding Source Type	Encounter Typ	Billed To			
By Provider	Q	01/02/2023 10:38 PM	Pad, Think	05/03/2004	10028	100173820	Save Nature Clinic	90283	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable				
Provider Productivity Report V2	9	01/02/2023 10:45 PM	Pad, Think	05/03/2004	10028	100173823	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins3			
Encounters	Q	01/02/2023 11:08 PM	Pad, Think	05/03/2004	10028	100173831	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1			
Provider/Counselor	Q	01/03/2023 1:23 AM	Pad, Think	05/03/2004	10028	100173835	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1			
Productivity report	Q	01/03/2023 1:31 AM	Pad, Think	05/03/2004	10028	100173836	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins2			
Progress Note	Q	01/03/2023 2:42 AM	Pad, Think	05/03/2004	10028	100173843	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1			
Provider Service Report	Q	01/03/2023 3:07 AM	Pad, Think	05/03/2004	10028	100173849	CDS/Floortime	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1			
ractice -	Q	01/03/2023 3:16 AM	Pad, Think	05/03/2004	10028	100173853	APOLLO	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1			
	100	01/03/2023	Pad, Think	05/03/2004	10028	100173854	APOLLO	90283	Primary:	Commercial	Billable	Ins2			

Patient Information Banner

Added support to display Patient preferred name in Patient Info Banner

Core 🏚 Setup

Authorized users can now configure the preferred name displayed for a patient in the **Info Banner**. This setting applies to all patients in the system. Following options are available, Name, Middle Name and Last Name. You can submit a ticket to have these options configured.

	Display Preferred Language	
HEADER BANNER	Display Preferred Name	
FEATURES	Display Preferred Name under Encounter History	0
FORM SPECIFIC	Set Patient Preferred Pronouns table column	Pronouns
PORTAL	Set Patient Preferred Name table column	Lived_First_Name
CLIENTTELL	Set Patient Preferred Middle Name table column	
CHARTMEDS EMAR	Set Patient Preferred Last Name table column	

New ACL to hide the "Add" button on the Address Book.

Core 🎝 Setup

Authorized users can restrict who can **Add** addresses to the **Address Book** by adding the ACL 'Restrict user from adding new address at Address Selection page' to identified staff. When enabled the Add button is not available on the address book at Encounter, Schedule, ROI, and Send Fax.



Ability to add/update a Contact Record in Form Builder

Core

DrCloudEHR Form Builder now includes a new **Field Type** to update other contacts for a patient tied to the option in the Patient Demographics page. This will update the list of all existing other contacts of a particular patient.

ontact Record orm Description			
ient Information			
Name	RelationShip		
write your answers here	Select 🗸		
Email	DOB		
write your answers here	write your answers here		
Address			
write your answers here	6 Select Address		
City	County		
write your answers here	write your answers here		
State	Zip Code		
California 🗸	write your answers here		
Home#	Cell#		
write your answers here	write your answers here		
Work#	Other#		
write your answers here	write your answers here		

Users can choose the other contact from the lookup window, and the address details of the selected other contact will **auto-populate** on the form fields. Additionally, a new contact can also be added from the lookup window.

Add	Cance	Q Search Organiza	tion here		Clear Text							ו(
ather	-											
Name/Title	Relationship	Email	DOB	Address	City	County	State	Zip Code	Home #	Cell #	Other #	Work #
Deserve to at		testPran@gmail.com	0000-00- 00									65565656
		vaishalialle@gmail.com	0000-00-	EDEN-A-709, Casa Paradiso	Hyderabad	Telangana	CA	500018	541-535- 6239	111- 111-11	222-222- 2222	333-333- 3333
	Father	Test@mail.com	2022-02- 01	1307 W Main St	Medford	Oregon	OR	97501	541-535- 6239	111- 111-11	222-222- 2222	333-333- 3333
		sreedhark@drcloudemr.com	0000-00-									WEWEW

ROI Form Builder

Added an "Address Book" to ROI Form Builder and Fax Center

Core

DrCloudEHR now provides access to the Address Book on the ROI type forms and the fax center.

ROI Form Builder:

Release to (entity name)			
write your answers here	6	Select Address	
Contact person	Phone number	Click to select Address	
write your answers here	write your answers here		
Address, City, State, and ZIP			
write your answers here			6
Email address	Fax number		
write your answers here	write your answers here		

Inter Fax:

Send Fax	
	Select Address
Fax number(s)*:	eg:+12323454567;+12323454568
Contact*:	
	(eg:Rachel Burns;Albie Eins)
Subject*:	
	(This is what will appear on the subject of the fax cover sheet.)
Cover Note :	
	(This is what will appear on the message area of the fax cover sheet.)
Reply to email*:	
Attach File*:	Choose File No file chosen (Supported File Types: jpg, jpeg, png, pdf, doc, docx)
	Send Cancel

Patient Portal

Ability to view and print Multi-Disciplinary Treatment Plans (MDTP) in the Patient Portal

Core

Multi-Disciplinary Treatment Plans can now be viewed/printed from the **DrCloudEHR Patient Portal** under Clinical Forms/Visit Forms. The Patient Portal also provides the ability for the Patient or guardian to sign the MDTP.

Multidisciplinary Treatment Plan	All Clear					
➡ Clinical – in office	▼ Others Present					
(2023-01-18 - 2023-01-31)	Others Present:					
Clinical – out of office (2023-02-22)	Others Present:					
Community Living	4					
(2023-02-24)	▼ Client Agreement					
Clinical Forms						
Session Note fb_v 3						
Client Intake (Under 3)						
	Guardian Signature: Client Signature:					
24 Hour Incident Report (1)	2023-02-24 15:21 2023-02-24 15:24					
Youth Chemical Dependency Assessment						
Clinician Psychotherapy Note						
🔿 Physician Note						
Youth Substance Use Disorder Assessment	clear clear					
Physician's Orders Latest One	Guardian Name:					
🔿 14-Day Treatment Plan	billing for testing 123					
Client Intake - Over 3 years old Revised						
Child MH Intake Revised	+ Outside Agency Signature					
Survey A						
➡ LAUSD Financial Responsibility	▼ Care Team Signatures					
Consent Forms	To view updated signatures from modified care team, save and reopen plan.					
Endovascular Laser Venous (1)	Admin Encoffedy Deckelory ADDN					
Privacy / Treatment Consent	Admin, Ensoftek - Bachelors - APRN					
Client Electronic Communication Policy-1	adme					
Alternate Caregiver	Ensoftek Admin LCSM					