



ensoftek[®]

DrCloudEHR[™]
August Release Notes

Release to Staging Site – July 23, 2023

Release to Production Site – July 30, 2023

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Overview

This document contains the Release Notes for August 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:



Core

Available to all users when released



Add-on

Dependent on the activation of other feature(s)



Setup

Some setup is required after the release



Add-on

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.

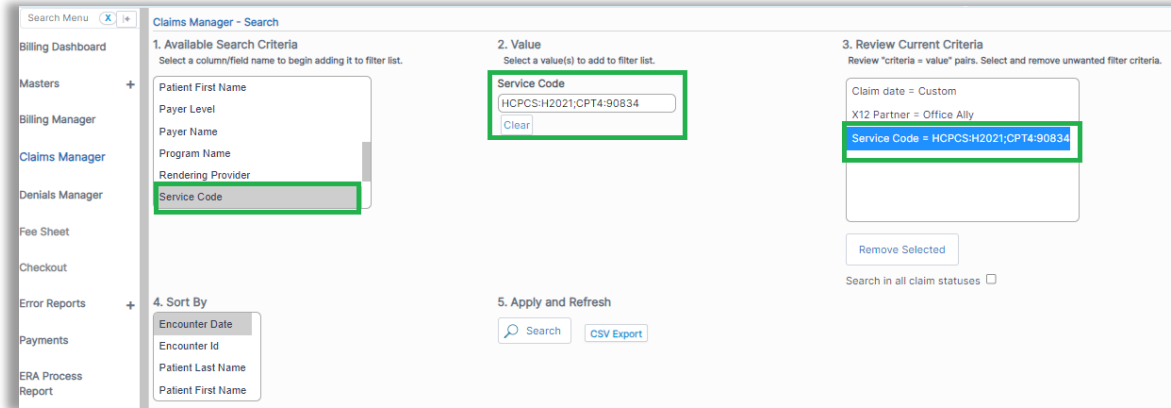
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Billing

New filter – Service Code – added to Claims Manager

Core Setup

Authorized users can search for claims using one or multiple service codes.

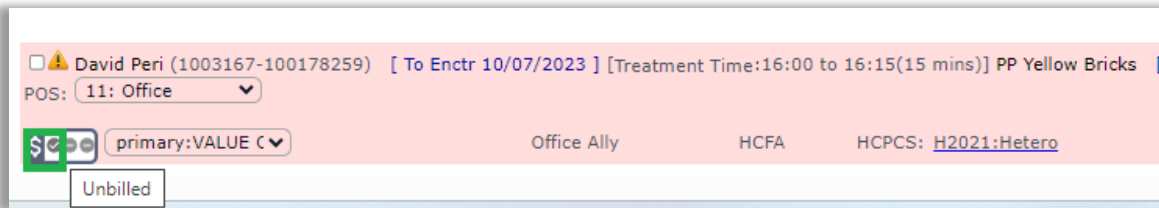


New visual cues to indicate the Last Level Billed in Billing Manager

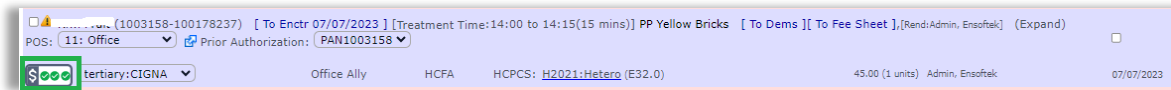
Core Setup

Updated the Billing Manager with an Icon for each service line in the results which denotes the billing status of each insurance level. The icon will change based on the Billing status of the encounter.

→ When Primary insurance is billed



→ When all three levels of insurances are billed



Statement Manager: Generate statements only for certain Payors

Core Setup

Authorized users can use the new Insurance filter on the Statement Manager to search and generate statements for patients based on insurance.

The screenshot shows the 'Generate Client Statements' interface. At the top, there is a navigation bar with icons for Timesheet, InTake, Schedule, Patients, Practice, Billing, Reports, Administration, Inboxes, Settings, ADL, and Unplug:Server. Below this, the main form is titled 'Generate Client Statements'. It includes a 'Patient' field with a placeholder 'Enter name or ID here'. The 'Facility' dropdown is open, showing options: A-SUBX, APOLLO123 (highlighted in red), and B-ACTS. The 'Insurance' dropdown is highlighted with a green box and shows options: ASSURANT HEALTH ASA, BEACON, BEN-E-LECT, and BLUE SHIELD OF CA. Below these are date pickers for 'From' (11/01/2023) and 'To' (11/07/2023), an 'Include' dropdown set to 'Only Client(s) with balance due', and checkboxes for 'Check to generate from the first encounter' and 'Include only Closed encounters'. There are also checkboxes for 'Display overall balance' and a 'Collection Status' dropdown set to 'All'. At the bottom, there are fields for 'Name', 'Download link expires in' (30 Days), 'Statement Format' (Version 2), and 'Post Actions' (Create Print Version). There are also dropdowns for 'Group Statements by services received at' (Service Facility), 'Facility address on Statement' (Primary Business Entity A), and 'Limit number of patients per PDF to' (100). A 'Print followup reason' checkbox is checked. A text area for 'Message to be printed on the statement' is empty. A 'Generate' button is at the bottom right, with a note: 'If more than 100 patients are seen scheduler and you can view the Statement Manager Report.' and a 'Notify me' checkbox.

Billing Manager - Generate a single claim for the total Admit Duration

Core Setup

Authorized users can generate UB04 claims on a monthly basis (default) or for the entire episode of care (Admit-Discharge). Please contact DrCloudEHR Client Services team to get your agency site configured.

Claim rules now support using service codes to determine what should go on the Claim

Core **Setup**

A new field "**Services**" is now available to authorized users in Claim Rules. Using this filter, they can configure a separate set of rules to use when generating a claim.

Note:

- *By adding the service codes as a filter, multiple claims may be created from a single encounter.*
- *Authorized users can create a claim rule set with a particular service code, but it is always good to have another claim rule set with the same filters and no service codes selected.*

Reports

Collections/Aging Report: New columns added - Secondary, Tertiary Insurance

Core Setup

Collections Report now includes two new columns i.e., Current Insurance and an Insurance column which displays Primary, secondary tertiary insurances.

Report - Collections/Aging

The Collections report displays collections details based on the facility, patient, report category, and aging parameters. This reports on billable encounters only. You can customize the results by selecting the checkboxes in Manage Columns.

Report By: Service Date From: Service Date To:

Facility: Provider: Client: PID: External ID: Whether Insured: Insurance:

Report Type: Service Type: Invoice Details:

Age By: Group By: Days Months Aging Columns:

Service Location: POS:

Manage Column(s)

Without Update

Name	Current Ins	Insurance	Follow Up Reason	Invoice	Svc Date	Charge	Adjust	Paid	Balance	Jul 23	Jun 23	May 23+	Prv	Sel	Level	Billed
KakINS, Raj	BEACON(\$15,375.00)	(P): CCRC (S): CIGNA (T): BEACON				15,375.00	0.00	5.00	15,370.00	0.00	15,370.00	0.00		<input type="checkbox"/>		
Total number of patients : 1				Report Totals:				15,375.00	0.00	5.00	15,370.00	0.00	15,370.00	0.00		

Without Update

eTAR

Updated the "Administered At" times to match the "Scheduled Time"

Core  Setup

DrCloudEHR now includes a new global flag to enable auto-populate "**Administered At**" times to match the "**Scheduled Time**".

ETAR
Add
Print
Back To Patient

Start Date:

Start Date	End Date
10/07/2023 2:28 PM	20/07/2023 2:28 PM

From Date: 10/07/2023 2:28 PM To Date: 20/07/2023 2:28 PM Treatment/Medication: ICD10:F09(Unspecified mental disorder due to known physiological condition)

Drug: PlusPharma Extra Strength PAIN RELIEVER,FEVER REDU Dose: 4 100mg (3 mg)

Treatment Date	Scheduled Time	Administered At	Status	Qty	CIWA	COWS	Notes
<input type="text" value="13/07/2023"/>	<input type="text" value="1:00 PM"/>	<input style="border: 2px solid green;" type="text" value="1:00 PM"/>	<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="14/07/2023"/>	<input type="text" value="1:00 PM"/>	<input style="border: 2px solid green;" type="text" value="1:00 PM"/>	<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Intrado

Updates to Intrado Appointment reminders file

 **Core**  **Setup**

Two new settings available for the Appointment reminders File. **Please contact DrCloudEHR Client Services to get these settings configured for your agency.**

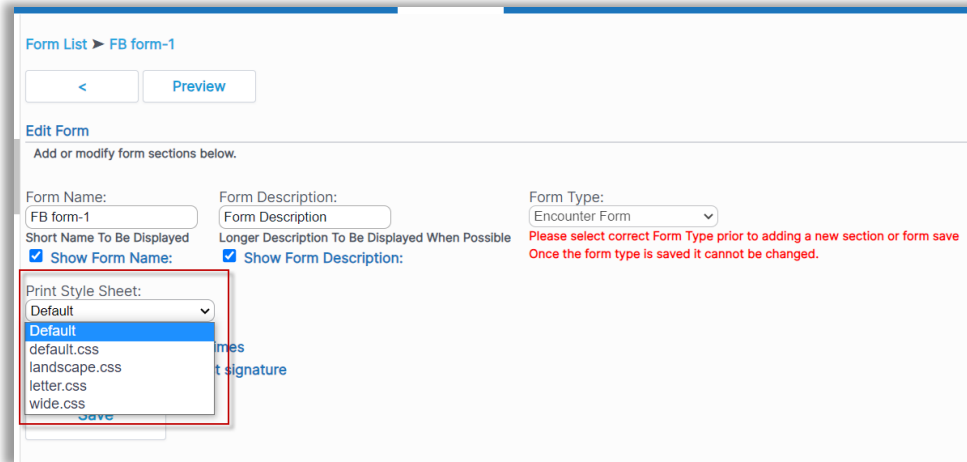
1. Send Provider Username instead of Name in Clienttell File.
2. Send Telehealth link instead of Location Address in Clienttell File.

Form Builder

New custom Print Settings for Form Builder Forms

Core Setup

Authorized users can now assign custom templates to be used when printing a form builder form. These templates provide improved printouts for forms with a lot of content or fields.



Options include:

- Default.css – Portrait mode
- Landscape.css – Landscape mode
- Letter.css – Letter Mode
- Wide.css – Wide Letter mode

What setting should I pick?

- Pick landscape.css and wide.css for forms that have the matrix, add rows, field types.
- Pick letter.css for forms with a lot of text - paragraph style printing.
- Pick wide.css when the form has fields that are laid out left to right most of the time.

Form Builder – IM+CANS Objectives

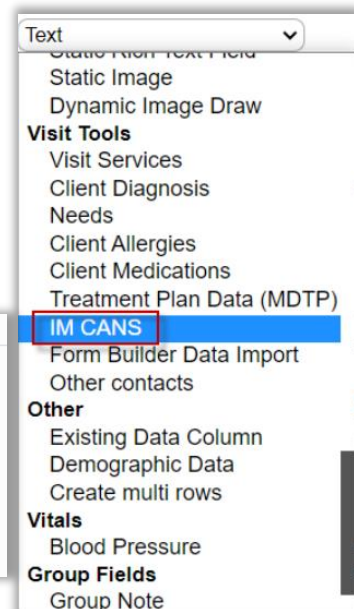
Core Setup

Authorized users can now pull the goals and objectives from the class-based form, IM+CANS.

Note: IM+CANS class-based form should be added to an encounter with data at the Goals and Objectives.

Active Forms
Choose which plan data you would like to insert into your form to indicate what you will be covering in this session.

Form Name	Date	Encounter
IM + CANS Assessment and Reporting form	2023-07-10 07:46:56	776



Practice

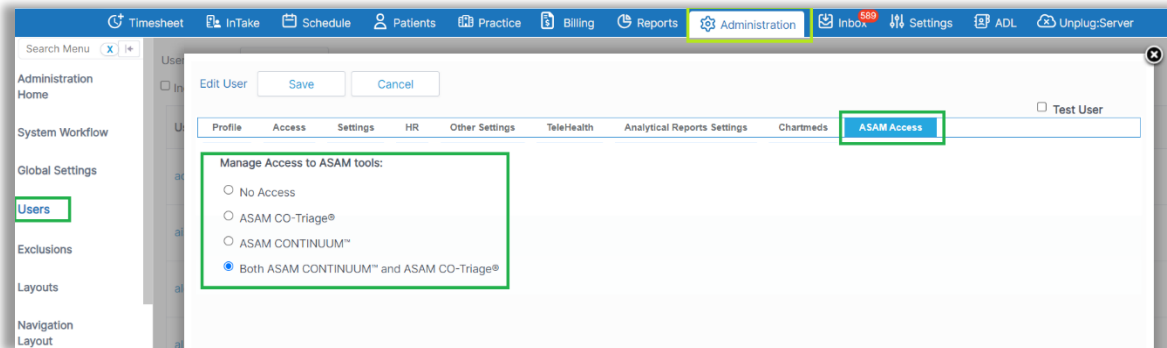
New Outcomes Measurement Tools - ASAM Continuum & Co-Triage

Core Setup Add-on

EnSoftek became an American Society of Addiction Medicine (ASAM) Channel Partner to help Behavioral Health agencies Create Quality Care Solutions for Addiction Treatment. This collaboration resulted in the integration of ASAM’s CONTINUUM software into the DrCloudEHR platform, providing providers with access to gold-standard quality care solutions for assessing, placing, and treating individuals living with addictions.

In addition to the CONTINUUM software package, EnSoftek has also integrated ASAM CO-Triage into DrCloudEHR. CO-Triage provides a brief assessment of individuals for substance use problems across each dimension of the ASAM Criteria to determine the provisional level of care placement and identify any immediate medical needs.

Authorized users can now use the ASAM CONTINUUM & Co-Triage tools in DrCloudEHR. **Please contact DrCloudEHR Client Services to purchase licenses and get your agency configured with ASAM tools.**

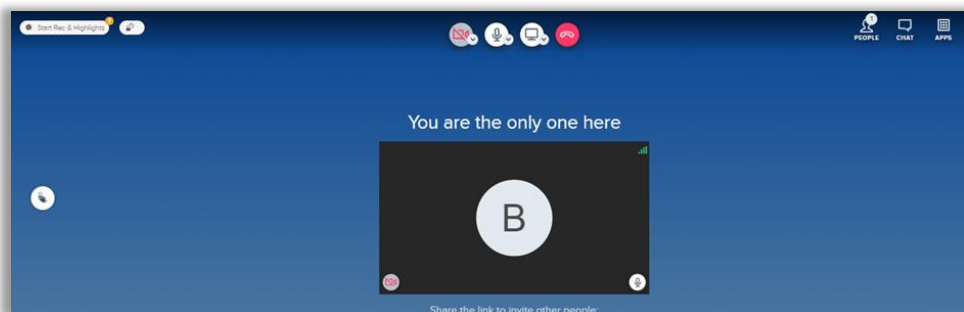


BlueJeans – New Telehealth Platform

Core Setup Add-on

DrCloudEHR has integrated BlueJeans, a new telehealth platform for behavioral health providers to meet with patients over video. By mapping the user experience to clinical team workflows, BlueJeans helps replicate the experience of onsite encounters and patient interactions while also providing the flexibility of virtual health care.

Please contact DrCloudEHR Client Services to purchase licenses and get your agency settings for BlueJeans.



Fax Center – Delete All Option

Core Setup

Authorized users can now delete multiple Faxes at the same time.

The screenshot shows the 'Incoming Faxes' section of the Ensoftek Fax Center. The interface includes a navigation bar at the top with various menu items like 'Timesheet', 'Intake', 'Schedule', 'Patients', 'Practice', 'Billing', 'Reports', 'Administration', 'Inbox', 'Settings', 'ADL', and 'Unplug-Server'. Below the navigation bar, there are two tabs: 'Incoming Faxes' (active) and 'Outgoing Faxes'. The 'Incoming Faxes' tab contains a table with columns for 'Message ID', 'To Fax Number', 'Pages', 'Received Time', 'PID', 'Client Name', and 'Action'. The 'Delete Selected' button is highlighted with a green box. The table contains five rows of fax data.

Message ID	To Fax Number	Pages	Received Time	PID	Client Name	Action
437654872	8553787418	2	2023-01-19 13:35:28			<input type="checkbox"/>
437654043	8553787418	2	2023-01-19 13:12:03			<input type="checkbox"/>
437652028	8553787418	2	2023-01-19 12:08:54			<input type="checkbox"/>
437511888	8553787418	1	2023-01-18 13:20:52			<input type="checkbox"/>
437511835	8553787418	1	2023-01-18 13:19:10			<input type="checkbox"/>