



DrCloudEHR™ August Release Notes

Release to Staging Site – July 23, 2023

Release to Production Site – July 30, 2023

Table of Contents

Billing	4
New filter – Service Code – added to Claims Manager.....	4
New visual cues to indicate the Last Level Billed in Billing Manager.....	4
Statement Manager: Generate statements only for certain Payors	5
Billing Manager - Generate a single claim for the total Admit Duration	5
Claim rules now support using service codes to determine what should go on the Claim.....	6
Reports	7
Collections/Aging Report: New columns added - Secondary, Tertiary Insurance	7
eTAR	8
Updated the "Administered At" times to match the "Scheduled Time"	8
Intrado	9
Updates to Intrado Appointment reminders file	9
Form Builder	10
New custom Print Settings for Form Builder Forms	10

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.

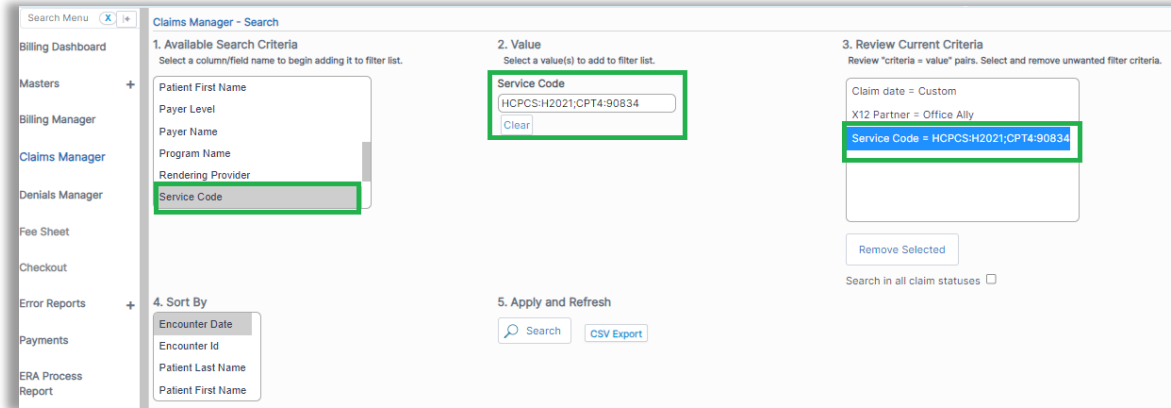
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Billing

New filter – Service Code – added to Claims Manager

Core Setup

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

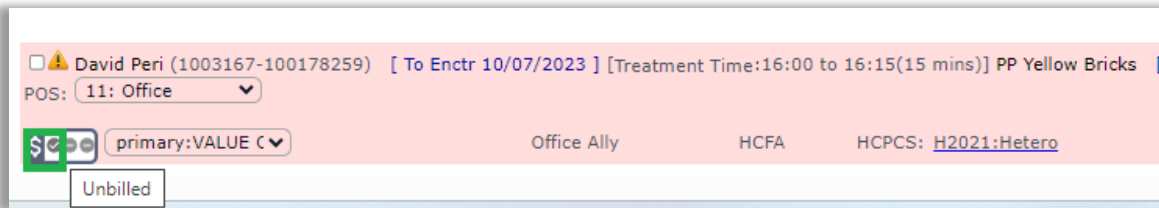


New visual cues to indicate the Last Level Billed in Billing Manager

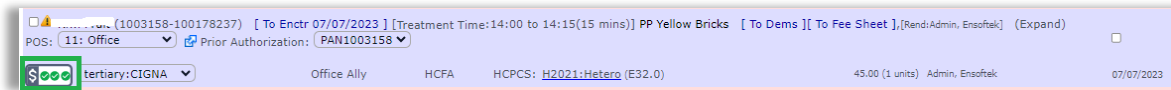
Core Setup

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' form. The 'Insurance' dropdown is highlighted with a green box and contains the following options: ASSURANT HEALTH ASA, BEACON, BEN-E-LECT, and BLUE SHIELD OF CA. Other visible fields include:

- Patient: Enter name or ID here
- Facility: A-SUBX, APOLLO123, B-ACTS
- From: 11/01/2023 To: 11/07/2023
- Include: Only Client(s) with balance due
- Checkboxes: Check to generate from the first encounter, Include only Closed encounters, Display overall balance
- Collection Status: All
- Name: [empty]
- Download link expires in: 30 Days
- Statement Format: Version 2
- Post Actions: Create Print Version
- Group Statements by services received at: Service Facility
- Facility address on Statement: Primary Business Entity A
- Limit number of patients per PDF to: 100
- Print followup reason: [checked]
- Message to be printed on the statement: [empty text area]
- Footer: If more than 100 patients are seen in scheduler and you can view the Statement Manager Report. [Notify me] [Generate]

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.

The screenshot shows the 'Add Claim Rule Set' configuration page. At the top left, there is a '<< Back To Claim Rules' button. Below it is a 'Save' button. The form contains several dropdown menus: 'Claim Type' (Select Claim Type), 'Funding Source Type' (Any Funding Source Type), 'Insurance' (Any Funding Source), 'Insurance Level' (Any Funding Source Level), 'Facility' (Any Program), and 'Service Code' (Any Service). The 'Service Code' dropdown is highlighted with a green border. Below these is a 'Source Claim Rule Set' dropdown (Select Claim Rule Set). At the bottom, there is a 'Notification method' section with checkboxes for 'Reminder' and 'Message'. To the right is a 'Who should be notified?' section with radio buttons for 'Group(s)' (selected) and 'User(s)'. Below this is a group selection interface with 'Available Group(s)' (ASAM Subscribers, Accounting, Admit Discharge, Analytical Reports Ad) and 'Selected Group(s)' (empty), with '>>' and '<<' buttons between them.

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: 3147 External ID: 3147 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		

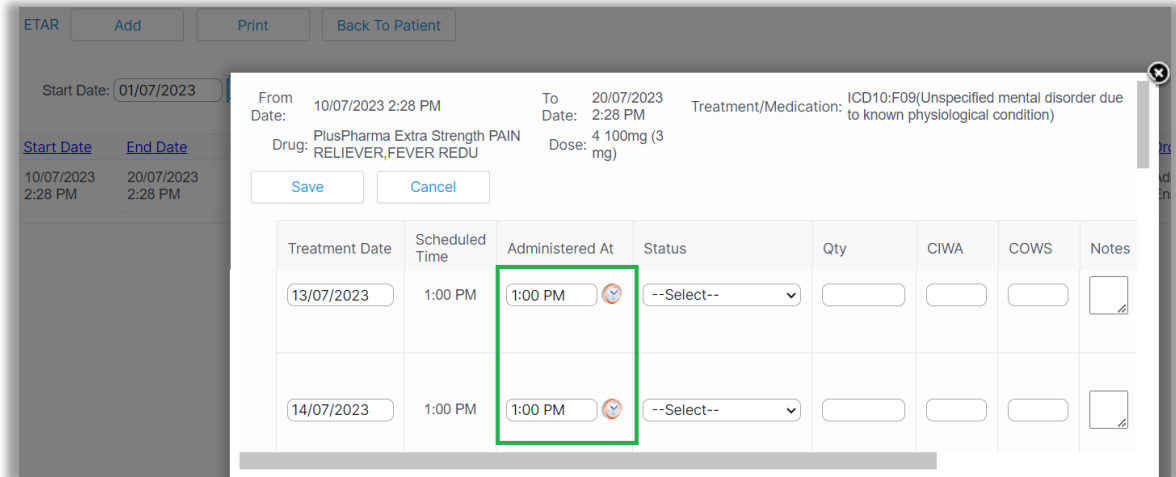
Without Update

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**".



The screenshot shows the eTAR interface with a table of treatment records. The table has the following columns: Treatment Date, Scheduled Time, Administered At, Status, Qty, CIWA, COWS, and Notes. Two rows are visible, both with a scheduled time of 1:00 PM. The 'Administered At' field for both rows is set to 1:00 PM and is highlighted with a green box. The 'Status' field is a dropdown menu with '--Select--' selected. The 'Qty', 'CIWA', and 'COWS' fields are empty. The 'Notes' field has a small icon in the bottom right corner.

Treatment Date	Scheduled Time	Administered At	Status	Qty	CIWA	COWS	Notes
13/07/2023	1:00 PM	1:00 PM	--Select--				
14/07/2023	1:00 PM	1:00 PM	--Select--				

Intrado

Updates to Intrado Appointment reminders file

 **Core**  **Setup**

Introduced two new Global flags for the Appointment reminders File.

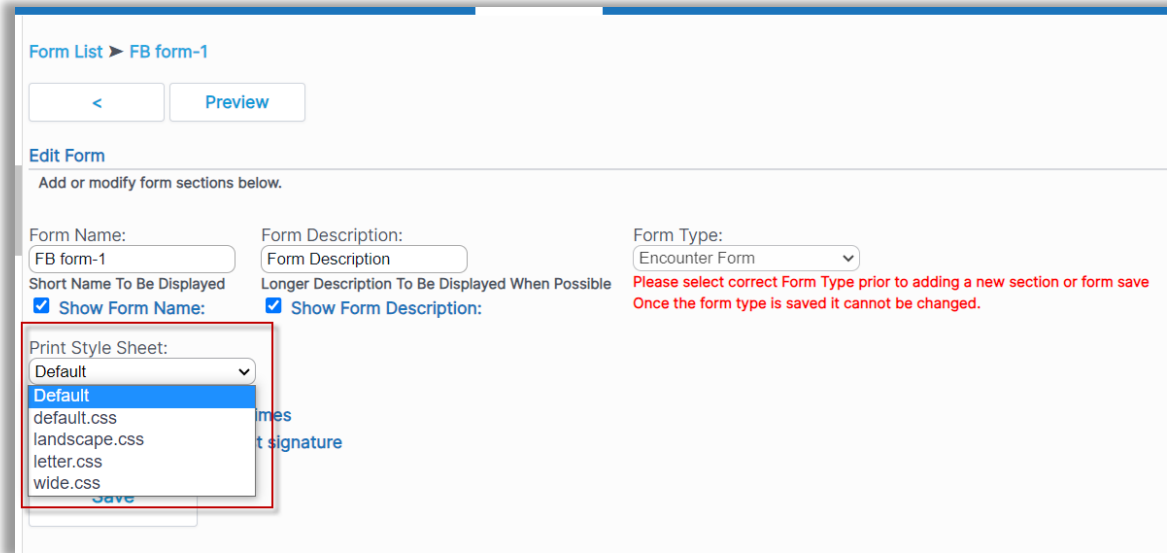
1. Send Provider Username instead of Name in Clienttell File.
2. Send Telehealth link instead of Location Address in Clienttell File.

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.