

# DrCloudEHR™ July Release Notes

Release to Staging Site – June 26, 2022 Release to Production Site – July 3, 2022



# Table of Contents

Overview
Release Dates
Clients
Generate MOTS Status Record for Submission4
Include Lived Name & Pronouns on the MDTP4
Create Encounter Forms per the Workflow when Uploading Documents4
Improvements to Emergency Access by Staff5
Notify Care Team Members when MDTP is Modified5
Include MDTP Review in Supervisory Review Workflow6
Option to Include only Active or All Medications in Form Builder Forms7
Option to Select Patient Position when Recording Blood Pressure8
Option to Capture Referral Status9
Improvements to Medications10
Practice11
Use Custom Templates to Notify Users via Email11
Patient Portal
Option to Configure Incoming Messages from Patient Portal12
Billing13
Filter Results in the Denials Manager using Service Code13
Filter Results in the Denials Manager using Cleared Status13
Option to Generate Client Statements Filtered by Payer14
Display the User who Initiated the Real-Time Eligibility Check15
Reports16
Option to Display Claim Numbers in the Encounters Report16
Option to Display Encounter Supervising Provider in the Provider Service Report16
Option to Display Insurance Type17
Option to Filter Based on Location of Service in Multiple Reports18



# Overview

This document contains the Release Notes for July 2022. Upon receipt, please review and test the 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



Dependent on the activation of other feature(s)



Some setup is required after release



Requires purchase and additional setup

If you have any questions regarding Staging Sites or this Release, don't hesitate to contact our support team at <a href="mailto:support@drcloudemr.com">support@drcloudemr.com</a>.

### Release Dates

- Updates available in Staging Sites: June 26, 2022
- Updates available in Production Sites: July 3, 2022



# Clients

### Generate MOTS Status Record for Submission

### Core 🎝 Setup

Once a user saves the **Date of Death** in demographics, the system will now automatically create a MOTS discharge record for submission with the client treatment status marked as **Death**.

### Include Lived Name & Pronouns on the MDTP

#### Core

Users can now see the Lived Name and Pronouns of a client in the MDTP.

Plan Header				
ter all required data.				
me:	Name For Plan:	Start Date:	End Date:	Date Last Reviewed:
allile 3F10 (1002497)	PLAN NEED/CONDITION	06/14/2022	06/30/2022	06/13/2022
eferred For Testing Preferred Fo	r Testing			

# Create Encounter Forms per the Workflow when Uploading Documents

### Core

When authorized users upload documents and create a new encounter to attach those documents, the system will now create all encounter forms configured to the encounter category.



### Improvements to Emergency Access by Staff

### Core 🏟 Setup

When users are authorized for Emergency Login access, they will now be able to see excluded clients in the main client search results. Excluded clients are highlighted with the **Lock** icon and authorized users can click the **Lock** icon to initiate access to these records. Once finished accessing, click the **Lock** icon to re-lock the record.

	2.51 51 500	aron resource of	at match the p		oou.on o	incornol.									1 - 1 OF 1	1
Filter Options:	Actions	Name	Client DOB	Client Sex	Home Phone	Mobile Phone	Work Phone	S.S.	External ID	PID	Payer Code	Admit Facility(s)	Insurance	# Enc(s)	Issues	[Date (Days) of Last Encounter]
Search	Click	LAPTOPP	04/01/2022 ndividual	Male					1002511	1002511		KYR multiple Super Specialty Hospital	<u>CIGNA</u> (WESTERN GR	9		06/09/2022 (1)

### Notify Care Team Members when MDTP is Modified

### Core 🗱 Setup

There is now an option to alert the Care Team when **Multidisciplinary Treatment Plan (MDTP**) data is edited.

essages       Image: Search By: Select type of reminder(s)       Image: Search By: Select type of reminder(s)       Search By: Set type of reminder(s)       Set type of
Neminders     Porms Reviews     Upcoming Appointments     DrFirst Notifications     Messages     Prior Authorization(s)     Contract Expiry       unselor shboard     Reminders(collapse)     Image: Contract Expiry     Image: Contract Expiry     Image: Contract Expiry       ms Reviews     View Log     Send Reminder     Image: Contract Expiry     Image: Contract Expiry       Search By:     Send Reminder(s)     Search By:     Search By:     Search Search Search       Sort By:     Individual Oue Date OPriority     Image: Contract Expiry     Image: Contract Expiry
Insector Inhooard     Reminders(collapse)       ms Reviews     View Log       Search By:     Search By:       Search By:     Search By:       Sort By:     Individual       Oue Date     Priority
ssecond       Reminders(collapse)         ss Reviews       View Log         Search By:       Select type of reminder(s)         Sort By:       Individual         Output       Output         Sort By:       Individual         Output       Output         Sort By:       Individual         Output       Output
Is Reviews View Log Send Reminder <3 of 3 >> Search By: Select type of reminder(s) Sort By: O individual O bue Date O Priority Set All (3) As Completed Set All (3) As Completed
Is Reviews Search By: Select type of reminder(s) Sort By: O Individual O Due Date O Priority Set All (3) As Completed Set All (3) As Completed
Search By:       Select type of reminder(s)       Search       Set Selected As Complete         Sort By:       Individual       Due Date       Priority       Set All (3) As Completed
Sort By: O Individual O Due Date O Priority Set All (3) As Completed
Show All
Priority     From     From     Constant     Constant
🗋 High Administrator, Ensoftek 📝 06/01/2022 (Overdue) Test Patient (100182) There exists a waitiist for this slot. For information, visit the Waitiist Dashboard.
🗖 High Administrator Excellent 🔽 TODAY. Jack Test (2004) Light Test (2004) has been undered. Places review for all
G High Administrator, Ensotek 2 TODAT Sack lest (10061) Initial plan for Sack lest (10061) has been opdated. Please review for ch



# Include MDTP Review in Supervisory Review Workflow

### Core 🏠 Setup

There is now the option for supervisors to review the **Multidisciplinary Treatment Plan (MDTP)** on the following screens:

Treatment Plan Reviews screen, under the Inbox tab

			L TIME SHEET		SCHEDULE		PRACTICE	BILLING			
Search Menu Clear I+ Messages	- Treatment Plan Review		Individu	alı				Res	ults per page	: 25 🗸	
Group Log	Service i tovidei.		maividu	ai.							Search
Patient Messages +	Patient Name:	Created By:		Created O	n:						
Counselor Dashboard	MDTP Review	reddy, yena		2022-00-10	5 TT.45 F W						
Forms Reviews											
Transactions Reviews	Plan Header Enter all required data.										
Treatment Plan Reviews	Name: MDTP Review (1002572)	Name For Plan: Community Living	ŋ	Date: 2022-06-17		Date:			Date Last Rev	riewed:	

Messages screen, under the Inbox tab

	TIMESHEET IN TAKE SCHEDULE INDIVIDUALS PRACTICE BILLING REPORTS ADMINISTRATION
Menu Clear I+	Message and Reminder Center = .
Log	Reviews(collapse) There are no encounter forms for review.
t Messages +	There are no transactions for review You have 1 Treatment Plan(s) waiting for your review
u Clear I+	TIMESHEET IN TAKE SCHEDULE INDOVIDUALS PRACTICE BILLING REPORTS ADMINISTRATION INDOX SETTINGS ADL UNPLUGISSERVER
Remi	e server Pornes Review Transactions Review Transactions Review Durpersonners Durban Review Durbers Durban Review Durbers Durban Review
ssages +	nt Plan Review-
Servic	Provider:  Provider:  Results per page: 25  Search
ns Patient	Anne: Created By: Created On: Name: 2010/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10/11/10
Plan	Letter Teuluy, yena 2022/00-10 11,40 Fm
	Save Back
iews	
iews	i Header
iews	I Header regulard data.
iews	I Header required data. Review (1002672) Community Living : 2022-06-17 () () Cate: () Community Living : 2022-06-17 () () Cate: (



#### Multidisciplinary Treatment Plan Lists screen

										Plan Strang
Add Plan										
de Inactive Plans 🗹										
Settings Changes										
19:	Start Date:	End Date:	Active	Visits:		Created Date:	Actions Available:			Supervisor Review Details
tient (Conditions 0 Objectives 0 Measures 0 Interventions:0)	0011700000					0011710000	Edit Plan	Add Progress	Deactivate Plan	A
ntified Needs 0 Objectives 0 Measures 0 Interventions 0)	06/17/2022		res		Ŷ	06/17/2022	Duplicate	Print Plan	Request Signature	Awaiting Supervisor Review

# Option to Include only Active or All Medications in Form Builder Forms

### Core

Using the **Form Builder** tool, users now have the option to choose whether to show only active medications or to show all medications (default will only show active medications).

Fax Center       Kind of data that will be entered e.g. Date.         Form Builder       Client Medications         Form Templates       Field Name         Medication       Short Name To Be Displayed on Form. Will not display for 'Static Text' fields.         Forms Settings       Show Field Title:         Forms Workflow       Checking this box will make the field title         Group Session       Makes a field mandatory.         Field Size:       Standard(single)	Facilities	Save Cancel
Form Builder       Client Medications         Form Templates       Field Name         Locations       Short Name To Be Displayed on Form. Will not display for 'Static Text' fields.         Forms Settings       Show Field Title: Checking this box will make the field title and description display on the form.         Forms Workflow       Checking this box will make the field title Makes a field mandatory.         Group Session Docs       Field Size:         Group Session       Standard(single)	Fax Center	Kind of data that will be entered e.g. Date.
Form Templates       Field Name         Locations       Medication         Short Name To Be Displayed on Form. Will not display for 'Static Text' fields.         Forms Settings       Show Field Title: Checking this box will make the field title and description display on the form.         Forms Workflow       Required: Makes a field mandatory.         Group Session Docs       Makes a field mandatory.         Field Size:       Standard(single)	Form Builder	Client Medications ~
Locations       Short Name To Be Displayed on Form. Will not display for 'Static Text' fields.         Forms Settings       Show Field Title: Checking this box will make the field title and description display on the form.         Forms Workflow       Required: Makes a field mandatory.       Read Only: Displays static text for existing data columns.         Group Session Docs       Field Size: Standard(single)       Image: Standard(single)	Form Templates	Field Name
Forms Settings       Show Field Title: Checking this box will make the field title and description display on the form.         Forms Workflow       Required: Makes a field mandatory.       Read Only: Displays static text for existing data columns.       Image: Checking this box will make the field title         Group Session Docs       Field Size:       Standard(single)	Locations	Short Name To Be Displayed on Form. Will not display for 'Static Text' fields.
Forms Workflow       Image: and description display on the form.         Group Session Docs       Image: Makes a field mandatory.         Field Size:       Image: Displays static text for existing data columns.         Group Session       Image: Displays static text for existing data columns.	Forms Settings	Show Field Title:
Group Session Docs Field Size: Group Session Group Session Field Size: Standard(single)	Forms Workflow	and description display on the form.      Read Only:      Eatch All Medications
Group Session Standard(single)	Group Session Docs	Makes a field mandatory. Displays static text for existing data columns.
Attendance     O     Medium       Status     O     Large       Select how large/how much space you would like	Group Session Attendance Status	<ul> <li>Field Size:</li> <li>Standard(single)</li> <li>Medium</li> <li>Large Select how large/how much space you would like</li> </ul>
Manage Goals this field to take up on the form page	Manage Goals	this field to take up on the form page



# Option to Select Patient Position when Recording Blood Pressure

Core 🔹 🔯 Setup

Authorized users can now select **Patient Position** (Lying Down, Sitting, Standing, etc.) options at **Vitals Form** when configured.

Vitals		
Name	Unit	2022-06-17 6:31 PM
Weight	lbs	
Weight	kg	
Height	in	
Height	cm	
Height	ft	
Patient Position		-Select- V
BP Systolic	mmHg	-Select-
BP Diastolic	mmHg	Sitting
Pulse	per min	Standing



# Option to Capture Referral Status

### Core

Authorized users can now choose from a list of referral status options when creating a new referral. The following options are provided:

- Received
- Sent
- Assigned
- Admitted
- Intake Complete
- Cancelled
- Inactive

dd/Edit Patient	Transaction	Save	Cancel		
Transaction Type:	Referral	~			
OUNTER-REFERRAL	REFERRAL				
Referral Date:*	14/06/2022	500 000 000	Refer By:*	Administrator, Ensoftek	~
External Referral:	Yes 🗸		Refer To:*	ARJUN, HERO	~
Reason:*	123456		<i>"</i> Program:	AFRH @ 2020	~
Referrer Diagnosis:			Risk Level:	Medium ~	
Include Vitals:	No 🗸		Requested Service:		Clear
Referral Status:	Admitted Unassigned Received Sent Assigned Admitted Intake Complete Cancelled Inactive	×			



### Improvements to Medications

### Core

Added **History** hyperlink at the Client Chart to display the medication history in a popup window.

Patient _	Print Active	e Medications				1	Deleted Me	dication His
	Title	Formula	Drug(Units)	Dose(Refill)	Begin Date	End Date	Status	Notes His
da -	lurasidone (Latuda)	20 mg tablet	lurasidone ( 20 mg)	Take 1 tablet by mouth once a day as needed ( 0 of tablets 3)	06/20/2022		Active	e
· · · · · · · · · · · · · · · · · · ·	simvastatin	80 mg tablet	simvastatin ( 80 mg)	Take 2 tablet by mouth twice a day as needed ( 0 of tablets :20)	06/20/2022		Active	
Jucation -								

Added Deleted Medication History at the Medication Edit/Preview screen to view Deleted medications.

ummary Chart	A Print	Active Medications						Deleted Medi	cation History
ssage Patient	Title	Formula		Drug(Units)	Dose(Refill)	Begin Date	End Date	Status N	lotes History
	simvastatin		80 mg tablet	simvastatin ( 80 mg)	Take 2 tablet by mouth twice a day as needed ( 0 of tablets :20)	06/20/2022		Active	e
arch/Add									
	-								

Deleted Medication History link popup window

litle	Formula	Drug(Units)	Dose(Refill)	Quantity	Duration(days)	Begin Date	End Date	NDCID	Occurrence	Outcome	Comments	Notes	Deleted On	Deleted By
irasidone .atuda)	20 mg tablet	lurasidone ( 20 mg)	Take 1 tablet by mouth once a day as needed ( 0 of tablets :3)	3 tablet	3	06/20/2022	06/20/2022	63402030230	Unknown or N/A	Unassigned			06/20/2022 13:21:17	Administrator, Ensoftek

Added a new report named **Medication History Report** to display medication changes for one or more clients.





# Practice

### Use Custom Templates to Notify Users via Email

### Core 🏟 Setup

Users can now set up custom templates to notify users via email such as when an offline report is ready.

Jeneral MOTS	++	•				USERNAME: {username} NOTE: Please to inform you that, your password to access the portal will be sent you in separate email	
BHDS Quick DB	+		Portal Welcome Email		Email	Dear (patientname), Patient Portal Web Address: (webaddress) USERNAME: (username) NOTE: Please to inform you that, your password to access the portal will be sent you in separate email.	
DrFirst XML Requests	+		Portal Registration Welcome Email		Email	Dear (patientname), You have successfully registered with our site. For future reference, here are the details you entered: Patient Portal Web Address; (webaddress) USERNAME: (usemame) PASSWORD: (password)	R
			Portal Documents	portal_documents	Email	Portal document is uploaded to the patient {patientname}, by user {providername}	
Billing	+		Portal Credentials		Sms	Dear {patientname}, Patient Portal Web Address: {webaddress} Your Portal Username: {username} Portal Password; {password}	8
Notification	_		ОТР		Sms	Dear {username}, You OTP for login is: {otp} Sincerely, DrCloudFHR Team	
Email	+		Offline Report Email		Email	<html><body>Dear (providermame),  otr&gt; br&gt;The Request you made at " (report name)" on (date_time) is complete and ready to download. Please login to DrCloudEHR and go to</br></body></html>	
Notification Templates	++					(report_path), 4br-2br-This is a system penerated email. If you encounter any issues accessing the report please reach out to DrCloudEHR support@drcloudemr.combr-  con-Regrards.4br-DrCloudEHR Client Servicesbr>/body-	



# Patient Portal

Option to Configure Incoming Messages from Patient Portal

Core 🔅 Setup

When enabled, the **New Message** button at **Inbox** will be unavailable in the **Patient Portal**.



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# Billing

Filter Results in the Denials Manager using Service Code

### Core

In the **Denials Manager**, users can now use the **Service Code** field to filter their search.

	TIMESHEET IN TAKE SCHE	DULE PATIENTS PRACTICE BILLING REPORTS ADMINIST	RATION INDOX SETTINGS ADL UNPLUG:SERVER
arch Menu Clear +	Denials Manager - Search		
ing Dashboard	1. Available Search Criteria	2. Value	3. Review Current Criteria
	Select a column/field name to begin adding it to filter list.	Select a value(s) to add to filter list.	Review "criteria = value" pairs. Select and remove unwanted filter criteria.
asters +	Patient ID	Service Code	Claim date = Last 30 Days
ling Managar	Patient Name Payer Level	CP14:90834	Service Code = CPT4:90834
ming manager	Remark Code	Ciear	
aims Manager	Service Date		
_			Remove Selected
enials	4. Sent Dir	E Apply and Defreeh	
anager	4. SOIT By	5. Apply and Reliesh	
no Shoot	Encounter Id		
ee Sheet	Patient Last Name	Print CSV Export	
	Fatient First Name		

### Filter Results in the Denials Manager using Cleared Status

### Core

In the **Denials Manager**, users can now use the **Cleared Denials** field to filter between **Cleared Denials** and **Non-Cleared Denials**.

	TIMESHEET IN	TAKE SCHEDULE	PATIENTS PRACTICE BILLING	REPORTS ADMINISTRATION	INBOX SETTINGS ADL UNPLUG:SERVER	
arch Menu Clear  + ^	Denials Manager - Search					
ling Dashboard	1. Available Search Criteria		2. Value		3. Review Current Criteria	
asters +	Select a column/field name to begin adding it to Claim Date	o filter list.	Select a value(s) to add to filter list. Cleared Denials		Review "criteria = value" pairs. Select and remove unwante	d filter criteri
ling Manager	Claim Status		All     Non-Cleared Denials Only     Cleared Denials Only		Cleared Denials = Non-Cleared Denials Only	
aims Manager	Cleared Denials	•			* Remove Selected	
enials Inager	4. Sort By		5. Apply and Refresh			
ae Sheet	Encounter Date Encounter Id Patient Last Name Patient First Name		Search Prin	t CSV Export		
heckout	<ul> <li>Oldest First</li> <li>Newest First</li> </ul>					



# Option to Generate Client Statements Filtered by Payer

### Core 🎄 Setup

Authorized users can now set the **Display Client Statements based on the Payer at Statement Manager** option to **Yes**, displaying the insurance filter when generating new statements.

Note: The default value will be set to No.

		TIME SHEET IN TAKE SCHEDULE PATIENTS PRACTICE BILLING REPORTS AD	
BHDS	+	Statement Manager Settings Below are the current statement manager settings.	
Quick DB Queries		Last modified: 06/16/2022 6:08 PM by Administrator, Ensoftek Setting Value	
		Statement Format Version 2 v	
Requests		Item Format (Version 2 only) Detail View *	
		Statement includes services received at Service Facility +	
EDI	+	Facility address on Statement Primary Business Entity Address *	
Feature Settings	_	Download link expires in 30 Days *	
outure cottinge		Print followup notes No *	
Billing	-	Notify the user when statement is available No *	
		Limit number of patients per PDF to 100 v	
Prior Authorization		Include only Closed encounters No *	
		Add to scheduler if patient count is more than 100 •	
ERA Processing Options		Display diagnosis details No +	
- F		Display provider details Provider Name *	
Statement		Include Non Billable services on the last page of the patient Statements (Version 2 only) No *	
Settings		Display Thank you message on Statements (Version 2 only) No *	
		Show payment due date on Statement (Version 2 only).	
Notification Center	+	Days from the Statement generation date to be the payment due date(Version 2 only). No	
		Display Patient Statements based on the Payer at Statement Manager. Yes 🗸	
Interfaces	+		

	TIMESHEET IN TAKE SCHEDULE	PATIENTS PRACTICE BILLING REPORTS ADMINIS	STRATION INBOX SETTINGS ADL UNPLUG:SERVER
▲ Generate Patient	Statements		
Patient-wise Patient: Entern	name or ID here	Facility: - All Facilities 💌	Insurance:
From: 12/17/	/2021 To: 06/17/2022	Include: Only Patient(s) with balance due 🗸	Display overall balance
Che	eck to generate from the first encounter	Include only Closed encounters	Collection Status: All
Payments			
EPA Process			
Report			
Statement			
Manager -			
New			



When configured, the system splits payments into **Client Paid** and **Insurance Paid** columns.

	× 00	nierate r	attern Statering	100												
Patient-wise Payments	P	atient:	N				Facil	ity: - All Facilitie	05	~	Insurance:					
ana Danada d	Fr	rom:	12/17/2021	— То: 🕻	6/17/2022		Inclu	de: Only Patien	t(s) with balance	due 🛩	🗌 Display o	werall balance				Submit
Tor Reports 1			Check to gen	rate from the first	encounter		🗆 In	clude only Closed	encounters		Collection S	tatus: All	*			
syments						-										
DA Desesso	Na	lame:				30 D	nload link e Days	expires in:	Version 2	mat.						
AA PIOCess	_															
eport	G	Froup Stat	ements by servic icility	s received at:	Facility address Primary Busine	on Statement:	Limit I	number of patien	ts per PDF to: 1	Print followup reason:				If more than 100 pati you can view the stat	ents are select lements next di	id, it will be queued to sche y under Statement Manage
tatement lanager	- M	Froup Stat Service F lessage ti	ements by servic icility i be printed on th	e statement:	Facility address Primary Busine	on Statement: ss Entity Ad V	<ul> <li>Limit r</li> <li>100</li> </ul>	number of patien	v v	Print followup reason:				If more than 100 pati you can view the stat	ents are select lements next d lownload	id, it will be queued to sche y under Statement Manage
itatement fanager	- M	Froup Stat Service F. Iessage ti	ements by servic icility be printed on th	e statement:	Facility address Primary Busine	on Statement: ss Entity Ad V	✓ Limit : ✓ 100	number of patien	v	Print followup reason:				If more than 100 pati you can view the stat	ents are select lements next di ownload	id, it will be queued to sche y under Statement Manage
eport	- M	Proup Stat Service F lessage to al Patient	ements by servic icility be printed on the (s): 1 Total Amo	es received at:	Facility address Primary Busine	on Statement: Iss Entity Ad V	<ul> <li>Limit r</li> <li>100</li> <li>unt in collect</li> </ul>	number of patien	not in collection: 2	Print followup reason:				If more than 100 pati you can view the stat	ents are select lements next d ownload	id, it will be queued to sche y under Statement Manage
eport atement anager ew sport	- M	Froup Stat Service F lessage to al Patient	ements by servic icility be printed on th (s): 1 Total Amo	e statement.	Facility address Primary Busine	on Statement: ss Entity Ad v	<ul> <li>Limit r</li> <li>100</li> <li>unt in collect</li> </ul>	tion: 0, Amount r	not in collection: 3	Print followup reason:		Patient Paid	Insu	t more than 100 pail you can view the stat	ents are select lements next d ownload Bal	d, it will be queued to sche y under Statement Manage ance for the reporting p
eport anager ew eport 304 Pre	- Mi	Proup Stat Service F lessage to al Patient	(s): 1 Total Ame	e statement:	Eacility address Primary Busine	on Statement: ss Entity Ad v	<ul> <li>Limit : 100         <ul> <li>100</li> <li>unt in collect</li> </ul> </li> </ul>	tion: 0, Amount r Ch	not in collection: 3 arge 80.00	Print followup reason: 20) Adjustment 10.00		Patient Paid	Insu	t more than 100 pail you can view the stat Notify me	ents are select lements next d ownload Bal	d, it will be queued to sche y under Statement Manage ance for the reporting p
eport anager ew eport 804 Pre rocess	- Mi	Roup Stat Service F. Iessage to	(s): 1 Total Ame	estatement:	Facility address. Primary Busine	on Statement: Iss Entity Ad V	<ul> <li>Limit r</li> <li>100</li> <li>Int in collect</li> <li>Charge</li> </ul>	tion: 0, Amount r Ch 31 Adjustment	not in collection: 3 arge 80.00 Patient Paid	20) Adjustment 10.00 Insurance Pad	Balance Folio	Patient Paid 0.00 w-up Reason	Insu	r more than 100 path ou can view the stat Notify me	ents are select lements next di ownload Bal	d, it will be queued to sche y under Statement Manage ance for the reporting p
tatement lanager lew teport B04 Pre tocess 4 ligibility &	- Mi	Roup Stat Service F. Iessage tr	s): 1 Total Amo	is received at:	Facility address. Primary Busine the reporting period the reporting period the reporting period the reporting period the reporting period the reporting period the reporting period	on Statement: Iss Entity Ad V	Limit (100     100     100     100     Charge     150.00     30.00	tion: 0, Amount r Ch 31 Adjustment 10.00 0.00	not in collection: 3 arge 80.00 Patient Paid 0.00 0.00	20) Adjustment Insurance Pad 50.00	Balance Follo 90.00 30.00	Patient Paid 0.00 w-up Reason	Insu	If more than 100 pair out an view the stat Notify me	ents are select lements next d ownload Bal	d, it will be queued to sche y under Statement Manage
keport	Tota	al Patient	s): 1 Total Amo	e statement: int to collect for stient 11 AM(1002250 PM(10022511)	Facility address. Primary Busine the reporting period 28) History 28) History 0) History	on Statement: Iss Entity Ad V	✓ Int in collect Charge 150.00 30.00 200.00	tion: 0, Amount r Ch Adjustment 10.00 0.00	not in collection: 3 arge 80 00 Patient Paid 0.00 0.00 0.00	20) Adjustment 10.00 Insurance Paid 50.00	Balance Follo 90.00 30.00 200.00	Patient Paid 0.00 w-up Reason	Insu	If more than 100 paid ou can view the stat Notify me	ents are select lements next d ownload Bal	d, it will be queued to sche y under Statement Manage

# Display the User who Initiated the Real-Time Eligibility Check

### Core

Real-Time eligibility requests history now includes the user who initiated the eligibility check.

Payer	Individual	DOB	Gender	Insurance Id	Provider	Request Date	Request By	Report	Status
Health Share OHP	test1 Applicants	07/26/2000	Female	12345	Administrator, Ensoftek	06/14/2022 01:35:17	Administrator, Ensoftek		Submitted

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# Reports

### Option to Display Claim Numbers in the Encounters Report

### Core

Authorized users can now view the **Claim Numbers** column by checking the **Show Claim Numbers** checkbox from the **Manage Columns** list in the **Encounter Report**.

PAN Usage Report	Select Facility(s) Billing Status	: All	~	• In	surance: A	I v		- C	Include Inactive users	\$		
Patient Hospitalization Report	Encounter No Patient: First	st,Last(PID/HRN)		E	ncounter Ty	pe: All	~	в	uilding:All		~	CSV
/iew Deleted Encounter Forms	☐ Show en ☐ Show En <u>Records</u> : 7	counters that o	lo not hav do not hav	/e form ve Fees	s C sheet C	□ New 2 Details		L	Show Claim Numbe	er(s)		
ppointments and	Provider	Date	Duration (Mins)	Unit(s)	Patient	External ID	PID	Category	Claim(s)	Billing Status	Encounter Status	Enc No
ppointments and	Administrator, Ensoftek	06/20/2022 12:48 PM	60	1	HPP, Laptopp	1002511	1002511	Adolescer A&D Residentia Treatment	P-1002511- 1002412620(TEST)	Open	Open	10022521
Patients	Administrator, Ensoftek	06/20/2022 12:53 PM	15	1	Hotspot, Raj Test	1002521	1002521	File Note		Open	Open	10022521
										-		

# Option to Display Encounter Supervising Provider in the Provider Service Report

### Core

Authorized users can now view the **Supervisor** column by checking the **Supervisor** checkbox from the **Manage Columns** list in the **Provider Service Report**.

Clear + *	All Service Type: Billable Service	× 5 ×	All	r No:		Encoun All	ter Type:	✓ All	~				CSV Ex	port			
thly Services ort	Show enc	ounters that de	o not have	forms								L		<u> </u>			
uider/Counselor	Show only	Encounters w	ith Incom	plete For	rms												
ductivity	Show Enc	ounters that d	o not have	Feeshe	et												
vider Service	Manage Column(	s)															-
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vider Service Sort	Manage Column( Display columns Provider Da Encounter Facil	s) te <sup>22</sup> Duration (Mi ity 2 Building 2	ns) 🗹 Units Form(s) 🗍	Patient Bill-To	t DX Code(s	nt Status s) 🗹 Ser	DOB Age (	External II	D 🗳 PID 🗆 Schoo Jescription 🗳 Contra	I Name	ETO ID	Category	Billing SI	atus 🗍 En	counter Status vice payment (C	Supervisor	- Enc# □ wrance ☑
vider Service port vices vider videtivity port V2	Manage Column( Display columns Provider Da Encounter Faci Telehealth Locat Total Number of En	s) te <sup>2</sup> Duration (Mi tity Building tion <sup>2</sup> Insurance T <u>ncounter(s)</u> : 2	ns) <mark>⊠</mark> Units Form(s) ⊡i γpe	Patient Bill-To	t	nt Status s) 🗹 Ser	DOB Age ( vice Code(s) Se	External II rvice Code E	D PID Schoo Description Contra	I Name	ETO ID Charge	Category Adjust	☑ Billing St ☑ Paid 〔	atus 🗍 En	counter Status vice payment (C	Supervisor o-Pay) Ins	Enc # 🗌
vider Service port	Manage Column( Display columns: Provider © Da Encounter © Facil Telehealth □ Locat Total Number of El Provider	s) te ② Duration (Mi tity	ns) <b>U</b> Units Form(s) ppe Duration (Mins)	Patient Bill-To Units F	t D Patier DX Code(s Patient	nt Status s) Sen	DOB Age ( vice Code(s) Se	External II rvice Code E Billing Status	D PID Schoo Description Contra Supervisor	I Name	ETO ID Charge	Category Adjust	Billing St Paid	atus C En Time of ser	counter Status vice payment (C	Supervisor Io-Pay) Ins Insurance Type	Enc # C
vider Service port vices wider wider vider vives clice – es Completion mpliance ph	Manage Column( Display columns Provider Da Encounter Factor Teteheath Locat Total Number of Er Provider Administrator, Ensoftek	s) te ☑ Duration (Mi ty □ Building □ tion ☑ Insurance T ncounter(s): 2 Date 13/06/202 14:30:27	Duration (Mins)	Patient Bill-To Units F	t Patien DX Code(s Patient Alle 1, Vaishali 1	nt Status s) Ser PID 28686	Category 1-ABH Commercial - No Show Doctor Visit	External II rvice Code I Billing Status Closed	D PID Schoo Description Contra Supervisor Administrator, Ensoftek	Facility AFRH 2020	Service Code(s)	Contract Adjust	<ul> <li>✓ Billing Si</li> <li>✓ Paid</li> <li>✓</li> <li>Charge</li> <li>0.00</li> </ul>	atus En	ounter Status vice payment (C	Supervisor ici-Pay) Ins Insurance Type	Enc #



# Option to Display Insurance Type

### Core

Authorized users can now view the **Insurance Type** column by checking the **Insurance Type** checkbox from the **Manage Columns** list in the following reports:

#### Provider Service Report

Brow encounters that do not have forms     enclose     Brow encounters with incomplete Forms     Browder     Browder	rovider Service	Billable Services	~				All		*						Offline F	Reports					
Show only encounters with incomplete Porms     Show and encounters with incomplete Porms     Provider     Provider     Provider     Date     Data     Data	ervices	Show encour	iters that do	not hav	e form	s								Å.							
Instruction               Show Encounters that do not have Feesheet         Instruction              Show Encounters that do not have Feesheet         Instruction              Disalay.columns        Instruction		Show only Er	icounters w	ith incon	npiete	Forms															
Bit     Display columns       Comparison     Provider Grade Duration (Mrs) Links Pratent Status DOB Age Extend to PPD School Name ETO D Collegory Billing Status S Encounter Status Supervisor Enc #       Extend Comparison     Provider Grade Duration (Mrs) Links Pratent Status DDB Age Extend to PPD School Name ETO D Collegory Billing Status S Encounter Status Supervisor Enc #       Extend Comparison     Provider Grade Duration (Mrs) Links Pratent Status DDB Age Extend to PPD School Name ETO D Collegory Billing Status S Encounter Status Supervisor Enc #       Estend Comparison     Bit-To Dx Code(s) Service Code(s) Service Code Description Contract Amount Code(s) Amount Code(s) Amount (Code(s) Amount (Code(	rovider roductivity leport V2	Show Encourt	nters that do	not hav	e Fees	sheet															
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Ni School     Ni School     Date     Duration for Administrator, 15     1     2022, 22189     Individual     Closed Open     852214     Yellow 9034:1     67.90     100.00     Primary: Primary: Release     Counter of Primary: Primary: Release     0     2     2     2     2     1     2     2     2     2     1     2     2     2     1     1     2     2     2     1     0     1     0	ractice -	Display columns																			
Provider     Date	totes Completion	Provider Date	Duration (Min	s) Units	Bill-To	tient Pa	itient Statu	us DOB Age Service Code(s)	Service Ci	nal ID Più	n Cont	ract Amount	Charge	Adjust	Paid	Time of s	ervice pa	Status	Co-Pav)	sor Enc#	2
Vogram Report         Administrator, Easofice         2006/2022         1         2022, 29189         Individual July Release         Closed Open         852214         Yellow 9084:1         67.90         100.00         Primary: Hailth           Instruction Immary By Immary By         Total Duration for Administrator, 16         1         67.90         100.00         0.00	lotes Completion Compliance Graph BS Report	Provider Date Encounter Facility Telehealth Location Total Number of Enco	Duration (Min Building Insurance Ty unter(s): 1	s) Units Eorm(s) C	s 🗹 Pa Bill-To	tient Pa	itient Statu le(s)	us DOB DAge Service Code(s)	Service Co	ode Descriptio	n Cont	ract Amount	Charge	Adjust	Paid C	Time of s	ervice pa	Status yment (	Co-Pay)	sor C Enc #	1
Total Duration for Administrator, 15 1 67.90 100.00 0.00 0.00 0.00 0.00 0.00 0.00	lotes Completion compliance sraph iBS Report	Provider Clate Encounter Facility Telehealth Location Total Number of Encou	Duration (Min Building Insurance Ty unter(s): 1	s) Units Eorm(s) pe Duration (Mins)	Bill-To Units	tient Pa DX Cod	elient Statu le(s)	US DOB Age Service Code(s) C	Billing Status	Encounter Status	Enc #	Encounter	Charge Facility	Service Code(s)	Contract Amount	Time of s	Adjust	Status yment ( Paid	Co-Pay)	Insurance Insurance	Fele
Jannal Ensofiek 1 br/30 1000 000 000 000	kotes Completion Sompliance sraph BS Report NI School rrogram Report	Provider Date Encounter Pacity Telehealth Location Total Number of Encou Provider Administrator, Date Ensoftek	Duration (Min Building Insurance Ty unter(s): 1 Date 20/06/2022 16:29:00	s) Vunit Eorm(s) Duration (Mins) 15	Pa Bill-To Units	Patient Pa DX Cod Patient 2022, July Release	PID 29189	us DOB Age Service Code(s) Category Individual Psychotherapy (40 mins)	Billing Status Closed	Encounter Status Open	Enc #	Encounter	Facility Yellow Bricks	Service Code(s) 90834:1	Contract Amount 67.90	Charge 100.00	Adjust	Status yment ( Paid	Insurance Primary: UMR	Insurance Group Health	Felc
ummary By	Inters Completion Compliance Interplance IBS Report III School rrogram Report Inancial -	Provider Date Encounter Pacity Telehealth Location Total Number of Encou Provider Administrator, Ensoftek Total Duration for A	Duration (Min Building Insurance Ty unter(s): 1 Date 20/06/2022 16:29:00	s) Vunit Eormis) D pe Duration (Mins) 15	Units	Patient Pa DX Cod Patient 2022, July Release	PID 29189	us DOB Age Service Code(s) Category Individual Psychotherapy (40 mins)	Billing Status Closed	Encounter Status Open	Enc #	Encounter	Facility Yellow Bricks	Service Code(s) 90834:1	Contract Amount 67.90	Charge 100.00	Adjust	Paid	Co-Pay)	Insurance Insurance Group Health	Fele
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#### Net Revenue Report

Clear  +	Report - Net Revenue								
ancial –	Encounter Facility Select Facility(s)	7: *	Encounter Provide	r: v	Insurance:		Ŧ	Patient	First,Las
	By: Date of Service	From: 02/06/2	2022 🚟 *	To: 20/06/2022	*	Service Coo	de:		
	Service Type: Billable Services	• De	tails $\bigcirc$ Summary	Display Subto	tals				
	Records: 55								
	Facility	Insurance	Insurance Type	Provider	Patient	Invoice	DOS	Service Code	Charges 4
	Purple Facility								
	Purple Facility	zzzValue Options (Medicaid)	Public	Administrator, Ensoftek					
				Vaishali S Alle	32.851943	10/06/2022	101:TM	500.00	-
				Pro	ovider (Administr	ator, Ensoftek	) Total(s)	500.00	0.00
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	Greater Washington F	sychiatry & Couns	ling						
	Greater Washington Psychiatry & Counseling	WELLNET HEALTHCARE- AETNA	Public	reddy, yellas					
					20186 85211	8 03/06/2022	KVD-123	1.00	

# ensoftek

### Receipts Summary Report

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volder's dividual mesheet sport manary m Builder ports - tive Reports - smale Health are Record	Mange Column(s) Disalay.columns Elitento Date of Service I Records:33 Method BEACON HEALTH OPTIONSVALUE OPTIONS	Invoice Posted By Invoice 29168.851403 29168.851083	Posted by yellas reddy	Patient Patient ACCESS, SUZUKI ACCESS, SUZUKI	der Pro Policy 123	Cedure Char DOS 27/05/2022 25/05/2022	pes ZAdjustment Provider yellas reddy yellas reddy	Procedure 90785 90791	Charges	Adjustments 0.00 2.00	Check# ☑ Paymer t: 10.00	Copay Insurance Type Medicaid Medicaid	2) eck#	- Сорау 0.00 0.00

# Option to Filter Based on Location of Service in Multiple Reports

### Core

Authorized users can now filter using the **Place of Service (POS)** and **Location** filters in the following reports:

#### **Collections Report**

ol Clear (+	Date Of Service	·	12/01/2021	00/20/2022		P							
nancial –	Facility: Mental Health		Provider:		▼ First	e <b>nt:</b> ,Last(PID/HRN)							
collections / .ging	Whether Insured: All	~	Insurance:	Report Type Open		v Billable	e Type: Services	v D	oice Det	ails:			
Outstanding Revenue By Age	Age By: Service Date	~	Group By: ○Days <sup>●</sup> Months	Aging Columns: 3									
orm Builder _	Location: All	~	POS:	×									
Active Reports -	Manage Column(s)	_											
CSSRS - Since Last Visit.	Submit		Print										
nactive Report –	Vithout Update	Select All	Clear All	Export Selected as CSV	Expor	t Selected to C	ollections						
CSSRS	Name	Location	POS	SSN	Phone	Follow Up Reason	Invoice Sv Da	/c Charge	Adjust	Paid	Balance	Jun 22	May 22
CSSRS - Initial	5Pro, Realme 5		11:Office	XXX-XX- 1111				210.00	0.00	0.00	210.00	0.00	0.0
sor oor mig.	5Pro, Relame F	Mental Health	55:Residential Subs Treatment Facility	ance Abuse				120.00	0.00	0.00	120.00	120.00	0.0
	ABH, Test K	Mental	03:School		111-111-			40.00	0.00	0.00	40.00	40.00	0.0



### Provider Service Report

	Insurance:		Building:		Bill-To:	_	Serv	се Туре:						1			
thly Visit	All		All	v	All POS <sup>+</sup>	~	Billat	le Services	~				Print	ļ			
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ess Note	Manage Column(s)																
	Display columns:																
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der Service rt	Building Form(s)	Bill-To D	Code(s)														
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#### Net Revenue Report

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t Revenue port		Location Mental H	n: ealth (Facility)	YOS:			×									
		Necorda, 2														Transactie
		Facility	Insurance	Insurance Type	Provider	Patient	Invoice	DOS	Service Code	Location	POS	Charges	Contract Amount	Expected Contractual Adjustment	Payments	Adjustmen
		Mental He	alth													
		Mental Health	CIGNA (WESTERN GROCERS)	Commercial	Administrator, Ensoftek											
						LAPTOPP HPP	1002511.100225213	06/20/2022	90834:GT	Mental Health	55:Residential Substance Abuse Treatment Facility	120.00	-	0.00	0.00	0.0
								Provider	(Administr	ator, Ens	oftek ) Total(s)	120.00	0.00	0.00	0.00	0.0
							Insi	urance (CIGI	NA (WESTE	RN GRO	CERS))Total(s)	120.00	0.00	0.00	0.00	0.0
		Mental Health			Administrator, Ensoftek											
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### **Receipts Summary Report**

	Enco	unter Facility	:			Paying E	ntity:						s	earch			
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cial -	Locat	ion: iond Oupatient	(Locati 🗸	POS:	,		Ŧ										
/ider's	Deta	ils															
esheet ort	Manage	Column(s)															
ointe	Records:	1															
imary	Method	Date of Service	Invoice		Posted by	Patient	Policy	DOS	Provider	Procedure	Charges	Adjustments	Payment	Location	POS	Insurance Type	Check#
Builder -	Aetna	06/20/2022	1002521.1	00225214	Ensoftek Administrator	Hotspot, Raj Test		06/20/2022	Ensoftek Administrator	90791	300.00	0.00	15.00	Redmond Oupatient	11:Office	Medicare	121212
e Reports -	Total for Aetna												15.00				
lication	Grand												15.00				