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# DrCloudEHR™ May Release Notes

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May 1, 2022

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# Overview

This document contains the Release Notes for May 1, 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, please contact our support team at [support@drcloudemr.com](mailto:support@drcloudemr.com).

**Updates available on Staging Sites: April 24, 2022**

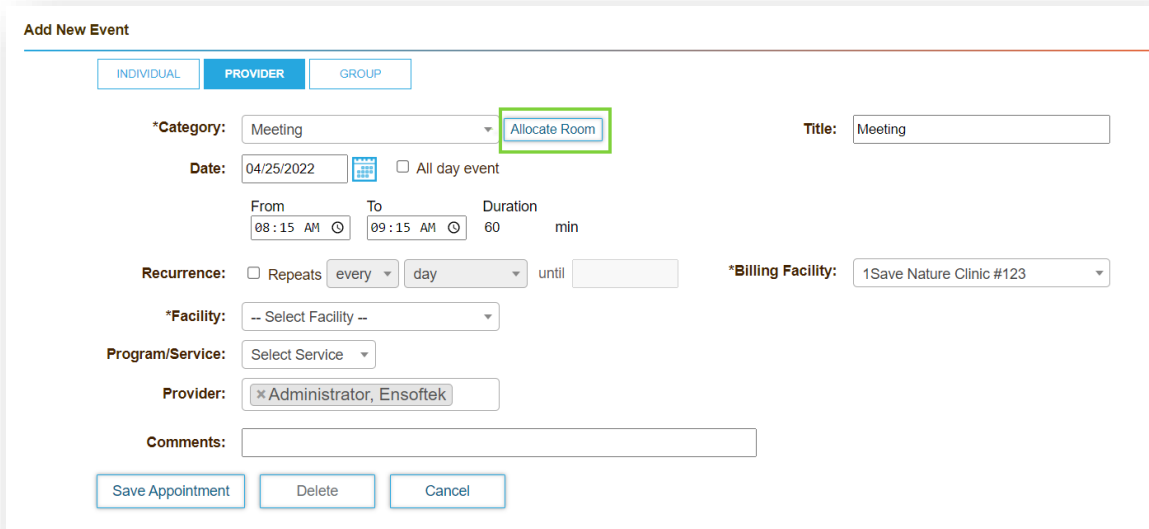
**Updates in Production: May 1, 2022**

# Schedule

## Add Option to Allocate a Room for Provider Appointments

Core  Setup

When creating a new provider **Event**, users now have the option to allocate a room. Once activated, the option will appear as a button next to the **Category** field.



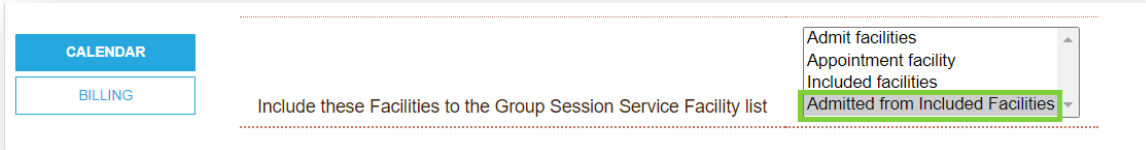
The screenshot shows the 'Add New Event' form with the following fields and options:

- Event Type: INDIVIDUAL (selected), PROVIDER, GROUP
- \*Category: Meeting (dropdown), with an 'Allocate Room' button highlighted in a green box.
- Title: Meeting (text input)
- Date: 04/25/2022 (calendar icon), with an 'All day event' checkbox.
- Time: From 08:15 AM (clock icon), To 09:15 AM (clock icon), Duration 60 min.
- Recurrence:  Repeats every day until (dropdowns).
- \*Billing Facility: 1Save Nature Clinic #123 (dropdown)
- \*Facility: -- Select Facility -- (dropdown)
- Program/Service: Select Service (dropdown)
- Provider: \* Administrator, Ensoftek (dropdown)
- Comments: (text input)
- Buttons: Save Appointment, Delete, Cancel

## Add Option to Display Admitted Facilities in Group Events

 Core Setup

Users can now change the chosen facility within a **Group Event** before the client has been checked in. After this option is enabled, it will appear in the **Service Facility** dropdown list as **Admitted Facilities from Included Facilities** when creating/viewing a **Group Event**. Once the client has been checked in, the selected facility cannot be changed.

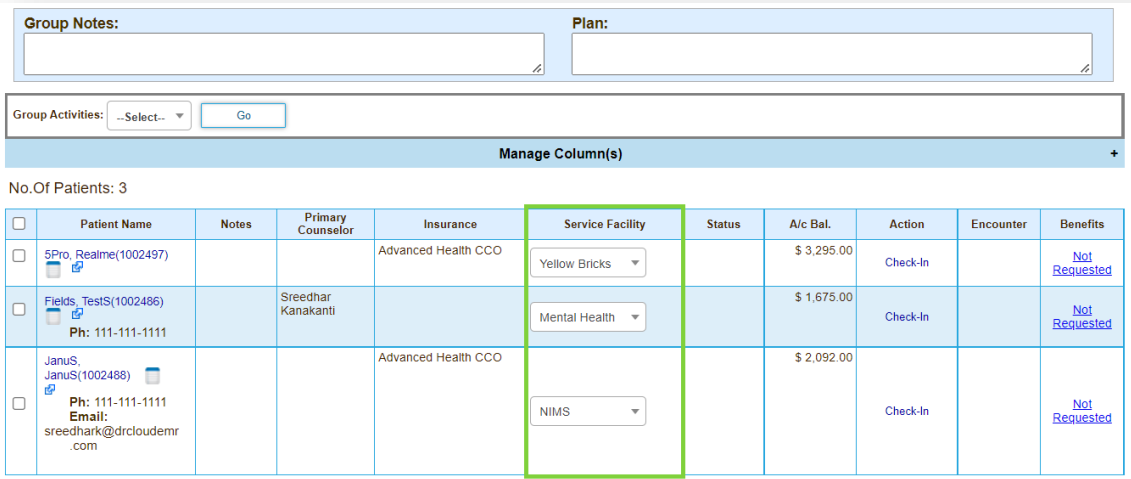


CALENDAR

BILLING

Include these Facilities to the Group Session Service Facility list

- Admit facilities
- Appointment facility
- Included facilities
- Admitted from Included Facilities



Group Notes:

Plan:

Group Activities:  --Select--

Manage Column(s) +

No.Of Patients: 3

<input type="checkbox"/>	Patient Name	Notes	Primary Counselor	Insurance	Service Facility	Status	A/c Bal.	Action	Encounter	Benefits
<input type="checkbox"/>	5Pro, Realme(1002497)			Advanced Health CCO	Yellow Bricks		\$ 3,295.00	Check-In		Not Requested
<input type="checkbox"/>	Fields, TestS(1002486) Ph: 111-111-1111		Sreedhar Kanakanti		Mental Health		\$ 1,675.00	Check-In		Not Requested
<input type="checkbox"/>	Janus, Janus(1002488) Ph: 111-111-1111 Email: sreedhark@drcloudemr.com			Advanced Health CCO	NIMS		\$ 2,092.00	Check-In		Not Requested

## Removed 'Excused Absence' Status Option in a Group Event

Core

When viewing a **Group Session**, the option to change the status of the attendees to **Excused Absence** has been removed to prevent accidental selection.

**To Manage Group Session Attendance Status:** Practice → Administrative → Group Session Attendance Status page

**Group Session Attendance Status**

Status Name	Create Encounter	Create Forms	Not Billable	Active	
Attended	Yes	Yes	No	Yes	<input type="button" value="Edit"/>
Absent	No	No	No	Yes	<input type="button" value="Edit"/>
Excused Absence	No	No	Yes	No	<input type="button" value="Edit"/>
CBT Coping Skills	Yes	Yes	No	No	<input type="button" value="Edit"/>

**Attendance**    Print Receipt  Email Receipt

Individual: 5Pro, Realm Balance Due:\$ 3,295.00 Create Encounter with Start Time As:  Appt Time  Check-in Time

CoPay:\$ 50.00

Attendance Status:

Payment Type:  Fee Paid:  Payment Method:  Check/Ref No:

Payment Type:  Fee Paid:  Payment Method:  Check/Ref No:

Payment Type:  Fee Paid:  Payment Method:  Check/Ref No:

# Clients

## Manage Access to the 'Close Encounter' Privilege

 **Core**  **Setup**

When the ACL **Disable Close Encounter Access** is enabled for the user group, they will not have access to the **Close Encounter** button on the following pages:

- Encounter Summary
- Fee Sheet
- Group Appointment
- Batch Closing Encounters

## Additional Functionality for Long-Term Care Facilities

 **Core**  **Setup**

For organizations that have the global **Long-Term Care** setting, there are now additional functions that can be enabled:

- Close Encounter
- Log Treatment Time



## Removed Access to Certain Actions for Clients Marked 'Deceased'

✔ Core

If a client is marked **Deceased**, the following admit actions will be disabled:

- New Admission, Edit, and Delete

If a user enters the **Deceased Date** prior to **Admit Date**, the following notification will be displayed:

*"Deceased Date/Room Allocation Date should not be less than Admit Date!"*

The screenshot shows the 'Save Animals (1002498)' interface. At the top, there are tabs for 'Admit / Pause / Discharge History' and 'Bed History', and a 'Show' dropdown menu set to 'All'. Below the tabs, there are two buttons: 'New Admission' and 'Close'. The main content area is divided into two sections. The first section shows 'Discharge Date: 04/18/2022 12:00 AM', 'Facility: 1Save Nature Clinic #123', and 'Status: Expired'. It also includes 'Provider when Discharged: doctor, Immunologist', 'Referring Provider: Referring NPI:', and 'Last updated by: Administrator, Ensoftek on 04/25/2022 7:03 PM'. The second section shows 'Admit Date: 04/01/2022 7:02 PM', 'Facility: 1Save Nature Clinic #123', and 'Last updated by: Administrator, Ensoftek on 04/25/2022 7:03 PM'. It also includes 'Referring Provider: Referring NPI:' and 'Provider/Team History' and 'Rooms' buttons. At the bottom, there is a footer: 'Last Updated By: Administrator, Ensoftek on 04/25/2022 7:03 PM'. Several buttons ('New Admission', 'Close', 'Edit', 'Delete', 'Provider/Team History', 'Rooms') are highlighted with green boxes.

## Manage Access to the 'Allow Delete Medication' Privilege

✔ Core ⚙ Setup

When the ACL **Allow Delete Medication** is enabled for a user group, they will have access to the **Delete Medication** button.

## Medical Diagnoses are now Associated with a Facility

✔ Core

Medical diagnosis information is now associated with the facility in which the diagnosis was made, resulting in the ability to view or change a previously established diagnosis at a different facility.

## Added Option to Indicate if a Diagnosis is Billable using Precedence

Core  Setup

When using the **Precedence** feature, there is now the option to indicate whether a diagnosis is billable. If selected as billable, the diagnosis will be displayed on the statement, regardless of precedence.

Select a diagnosis below or click "Add Other" to search for diagnosis. Then, scroll down to review details and click "Save & Exit"

Unspecified Arthropod-borne... ICD10:A94	Adjustment Disorder W Mixed... ICD10:F43.25	Louse-borne Relapsing Fever ICD10:A68.0	Typhoid Fever With Heart In... ICD10:A01.02	Scarlet Fever Uncomplicate... ICD10:A38.9
Typhoid Fever Unspecified ICD10:A01.00	+ Add Other...			

Billable Diagnosis Code

Coding:    Diagnosis is co-occurring/from an outside agency

Title:

Begin Date:

End Date:

## Removed Empty/Unused Fields when Using the Legacy Search Feature

Core

When using the Legacy Search option via the dropdown menu, the search results will no longer display fields that have been set to 'Hidden.' If a field has no value, it will not be displayed in the results.

## Changed the Destination of Client-Related Notifications

Core

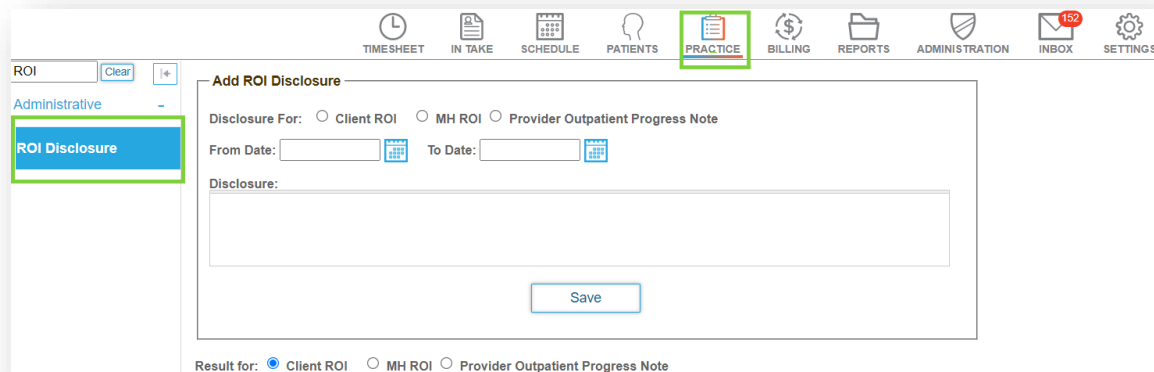
When a user receives a notification from a client (i.e., a message from the client, a client completed a form, etc.), the notification will now be displayed in the **Client Inbox** rather than in the user's general inbox.

## Added Interface to Manage Disclosure Content for ROI Forms

✔ Core ⚙ Setup

There is now an interface to customize the disclosure content for the **Client ROI** and **MH ROI** forms separately. Any changes made may be defined periodically. However, changes will not affect older versions of these forms.

**To Manage:** Practice → Administrative → ROI Disclosure



## Added a Fully Customizable A&D Assessment Form

✔ Core

Using the **Form Builder**, we developed a customizable version of the **A&D Assessment**, allowing the option to edit the form as needed. This form is titled **A&D Assessment V2** and is fully customizable.

## Added the Body Surface Area Field to Vitals Section

✔ Core ⚙ Setup

There is now the option to add the **Body Surface Area (SqMts)** field into the Vitals section of a client's chart.

## Added Optional Client Demographics Sections for the Patient Portal

Core  Setup

When viewing a patient's demographic information in the **Client Summary Chart**, there are now additional fields that can be added or removed. They are listed as follows:

- Advanced Directives
- Clinical Reminders
- Golden Thread Alerts
- Medications
- Medical Problems
- Allergies
- Appointment Reminders
- Surgeries
- Dental Issues
- Non-Mediaion Orders
- Cognitive Status
- ID Card Photos

## Added Additional Information to the Summary of a Closed Encounter

Core  Setup

When a user closes an **Encounter**, a Global Flag Setting enables a pop-up including the **Diagnosis Summary** and the **Service Summary**. When enabled, this is what will be displayed:

### Diagnosis Summary:

Diagnosis Code	Description
ICD10:F43.25	Adjustment disorder with mixed disturbance of emotions and conduct
ICD10:A01.00	Typhoid fever, unspecified

### Service Summary:

Units	Service Code	Modifier	Diagnosis Pointer
1	CPT4:90791 (Assessment (MH, SUD Private), per session)		F43.25
1	CPT4:90840 (MH Psychotherapy for Crisis, each additional 30 min)		A01.00

# Added Service Summary Section to the Patient Encounter View

Core  Setup

When viewing a **Patient Encounter** form in an **Encounter**, the **Service Summary** section is now visible below the **Diagnosis Summary** section.

Individual Encounter by Ensoftek Administrator (Collapse)

**Reason:**

**Service Program:** Bend Out Patient

**Billing Facility:** BestCare Treatment Services

**Place Of Service:** 11:Office

**Category:** Assessment

**Date of Service:** 01/06/2022 06:04:00

**Provider:** Administrator, Ensoftek

**Duration in Units:** 1

**Check-Out Date:**

**After Visit Summary:**

**Diagnosis Summary:**

Diagnosis Code	Description
ICD10:F43.0	Acute stress reaction

**Service Summary:**

Units	Service Code	Modifier	Diagnosis Pointer
1	CPT4:0906 (Intensive Outpatient)		F43.0

## Made Various Adjustments to Billing Notes

### Core

- Removed the option to enter **Billing Notes** from the **Client Demographics** section of the **Client Summary Chart**.
- Added the option to enter **Billing Notes** via the **Billing** link in the **Client Demographics** section of the **Client Summary Chart**.
- Text from the **In Collections** field will be displayed if a client is sent to **Collections** in the **Collections Report**.
- Billing Notes** are displayed at the places where there is a client search.

## Changed the Destination of the 'Click here to see all Reminders' Link

### Core

Selecting the link **Click here to see all Reminders** at the bottom of the **Inbox Reminders** section in the **Client Summary Chart** will display all reminders related to the selected client.

Save, Birds(1002508)

Reminders

Send Reminder << 25 of 34 >>

Search By:  Search Set Selected As Complete

Sort By:  Due Date  Priority Set All (34) As Completed

[Show All](#)

<input type="checkbox"/>	Priority	From	Action	Due Date	Individual	Description
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/11/2022 ( Overdue )	Save A Birds (1002508)	There is a error Creating Telehealth Appointment. Error Details: Appointment Date(s) 04/11/2022,04/12/2022,04/13/2022,04/14/2022,04/15/2022,04/16/2022,04/17/2022,04/18/2022,04/19/2022,04/20/2022,04/21/2022,04/22/2022,04/23/2022,04/24/2022,04/25/2022,04/26/2022,04/27/2022,04/28/2022,04/29/2022,04/30/2022
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/11/2022 ( Overdue )	Save A Birds (1002508)	Your individual has checked-in for an appointment at 1Save Nature Clinic #123 Appointment date: 04/11/2022 Appointment Time: 06:00 AM to 07:15 AM
<input type="checkbox"/>	High	Kanakanti, Sreedhar	<input checked="" type="checkbox"/>	04/11/2022 ( Overdue )	Save A Birds (1002508)	You have an update in a appointment at 1Save Nature Clinic #123 on 04/12/2022,04/13/2022,04/14/2022,04/15/2022,04/16/2022,04/17/2022,04/18/2022,04/19/2022,04/20/2022,04/21/2022,04/22/2022,04/23/2022,04/24/2022,04/25/2022,04/26/2022,04/27/2022
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223676) for past date at Asean Mental Health. Date of Service: 02/05/2022 11:07:00
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223677) for past date at Asean Mental Health. Date of Service: 02/12/2022 11:12:00
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223678) for past date at Asean Mental Health. Date of Service: 02/19/2022 11:14:00
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223680) for past date at Asean Mental Health. Date of Service: 02/26/2022 11:18:00
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223681) for past date at Asean Mental Health. Date of Service: 03/05/2022 11:21:00
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223682) for past date at Asean Mental Health. Date of Service: 03/12/2022 11:23:00
<input type="checkbox"/>	High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	04/12/2022 ( Overdue )	Save A Birds (1002508)	Ensoftek Admin has created Encounter(100223683) for past date at Asean Mental Health. Date of Service: 03/19/2022 11:26:00

## Added Additional Filters to the Statements Page



When searching for Encounters through the Statements page, users now have access to additional filters to search:

- Date Range
- Only encounters with a balance due

There is also an option to save the filter and set it as the default.

The screenshot shows the 'Statement' interface with the following elements:

- Buttons: Print, PDF Download Selected Statements, Close
- Facility Address: Primary Biz. Facility
- Print Follow-up Reason:
- Search Filters: Svc Date (calendar icon), To (calendar icon), Encounter status: All,  Only encounters with balance due, Search, Clear

<input type="checkbox"/>	Client	Invoice	Svc Date	Last Stmt	Insurance(s)	Charge	Adjust	Insurance Paid	Patient Paid	Balance	Follow-up Reason	Encounter Status
<input checked="" type="checkbox"/>	10031688	10031688.100640401	03/28/2022	03/31/2022	Details not available	300.00	17.00	0.00	0.00	283.00		Open
<input type="checkbox"/>	10031688	10031688.100640367	03/24/2022		Details not available	100.00	0.00	0.00	100.00	0.00		Open
<input checked="" type="checkbox"/>	10031688	10031688.100640019	07/08/2021		Details not available	299.43	0.00	0.00	0.00	299.43		Open
<input checked="" type="checkbox"/>	10031688	10031688.100640018	05/12/2021		Details not available	100.00	0.00	0.00	0.00	100.00		Open
Total:						799.43	17.00	0.00	100.00	682.43		
Undistributed Amount:										250.00		
Total Balance Due:										432.43		

# Practice

## Added Column to Display Number of Destroyed Drugs/Vaccines

✔ Core

When viewing the **Destroyed Drugs/Immunizations** page, there is now a column to represent the quantity of Drugs or Vaccines that have been destroyed.

Additionally, the value of the **Destroyed Quantity** field will be deducted from the value of the total quantity (**Qty** field).

Destroyed Drugs / Immunizations

From: 2022-01-01 To: 2022-04-25 Refresh Print

Drug / Immunization Name	NDC	Lot	Qty	Destroyed Quantity	Date Destroyed	Method	Witness	Notes
		1111	945	15	2022-01-31	test	ewe	weqew
Haemophilus influenzae type b vaccine, PRP-T conjugate	49281-0545-03,49281-0545-05,58160-0818-11,58160-0806-05,58160-0816-05	LO1123	4995	19	2022-03-29	Hand	Balu	Expired
hepatitis A and hepatitis B vaccine	23324215155	3211	119	3	2022-04-05			
pneumococcal conjugate vaccine, 13 valent	00005-1971-02	54321	965	13	2022-01-31			
SARS-COV-2(COVID-19)	12345-6789-01	A2345	760		2022-01-25	test	e	w
zolpidem	00024542131	123	0		2022-01-31	ew		

## Added Ability to Remove Admitted or Non-Admitted Patient(s) from the Wait List Dashboard

✔ Core

There is now a dropdown menu in the **Status** field within the **Wait List Dashboard**, which allows the user to change the status and the alert message. Changing their status will remove them from the Waitlist Dashboard.

**Assign Bed to Patient**

Save Nature (28493)

**Patient should be admitted to the selected (1Save NatureEnvironment) facility before approving to waitlist.**

Status :

Facility : 1Save NatureEnvironment



# Added a Column in the Wait List Dashboard



In the **Wait List Dashboard**, there is now an additional column to display **Status Change Date**. If the status has been changed, the date of that occurrence will be shown here. **Records** labeled **Active** will not display any date in this column.

**Wait List Dashboard**

Facility: All selected Type: Bed

Wait List From: From Date Clear Wait List To: To Date Clear

Individual: Status: All selected Social Determinants:

Search Print CSV Export

Manage Column(s)

Total Records: 9

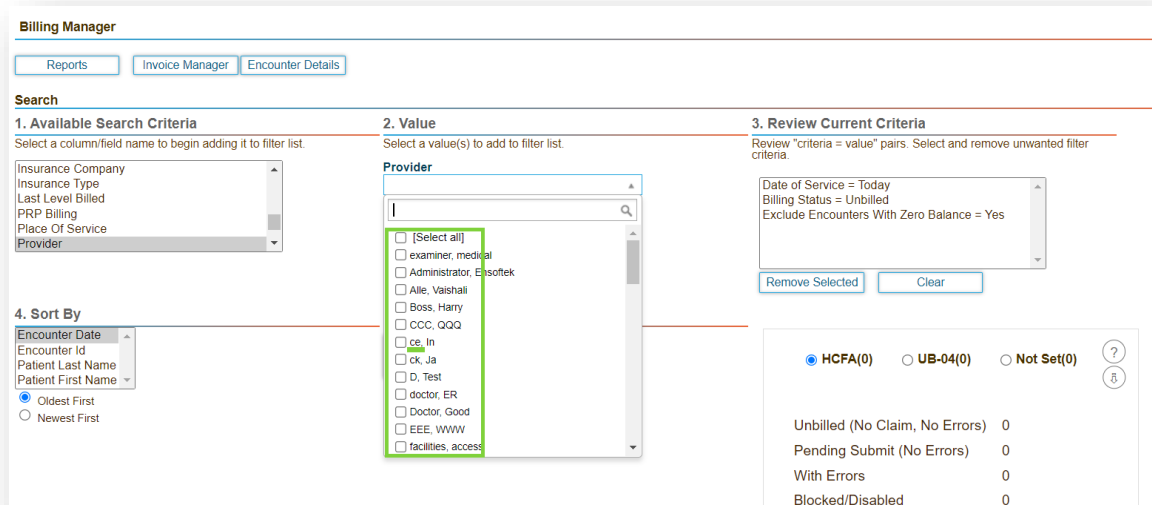
Actions	Facility	Individual	Added to Waitlist On	Bed Requested	Date Bed Requested	Bed Allocated	Desired Placement Date	Expected Release Date	Last Note Date	Social Determinants	Status	Status Change Date
	11Semifinal AFRH Billing	Art K Decco (29151)	2022-04-25							Pregnant Female, Healthy behaviours	Removed No Contact	2022-04-25
	11Semifinal AFRH Billing	Janu K Janu (28390)	2022-04-16								Removed No Contact	2022-04-16
	1Save NatureEnvironment	Save Nature (28493)	2022-04-25		2022-04-26		2022-04-26				Active	
	1Save NatureEnvironment	Art K Decco (29151)	2022-04-22	QQ1234	2022-04-22	QQ1234	2022-04-22	2022-05-31		Pregnant Female, Healthy behaviours	Successfully Placed	2022-04-22
	1Save NatureEnvironment	test user1 (28427)	2022-04-16								Removed at Client Request	2022-04-16

# Billing

## Added the Option to Select Multiple Providers in Billing Manager



In the **Billing Manager**, users can now filter by selecting multiple providers in the dropdown list.



## Made Various Adjustments within Statement Manager Settings

✔ Core

When working with the **Statement Manager**, there are now multiple versions of the **Statement Format: Version 1** and **Version 2**.

**Version 2** includes new viewing options:

- **Summary View:** One line per encounter
- **Detail View:** Multiple lines per encounter
- **Detail View** is the default value for this field

Changed **Display provider details on patient Statements** to a multi-select option:

- Added name, footnotes, and license options
- If the old option was set to **No**, it will preselect **Name**
- If the old option was set to **Yes**, it will select all options
- These changes apply to both versions of the **Statement Format**

### Statement Manager Settings

Below are the current statement manager settings.

*Last modified: 2022-04-21 23:18:48 by Administrator, Ensofttek*

Setting	Value
Statement Format	Version 2
Item Format (Version 2 only)	Summary View
Statement includes services received at	Billing Facility
Facility address on Statement	<input type="text"/>
Download link expires in	<input type="text"/>
Print followup notes	<input type="text"/>
Notify the user when statement is available	<input type="text"/>
Limit number of patients per PDF to	100
Include only Closed encounters	Yes
Add to scheduler if patient count is more than	25
Display diagnosis details	No
Display provider details	Provider Name
Include Non Billable services on the last page of the patient Statements (Version 2 only)	No
Display Thank you message on Statements (Version 2 only)	No
Show payment due date on Statement (Version 2 only)	No

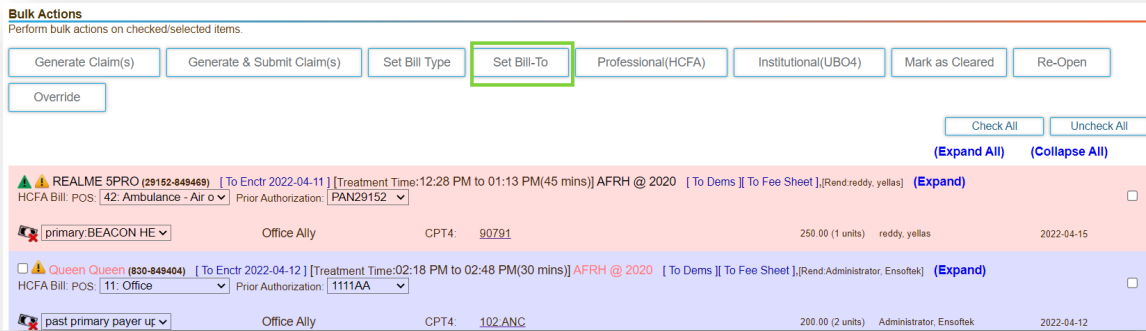
# Added a Button to Set/Change who the Bill will be Sent To

Core Setup

There is now a **Set Bill-To** button for users to select and set/change the **Bill-To** field of any encounter to **Insurance** or **Patient**.

ACL Title: **Hide access to Set Bill-To at Billing Manager**

- When the ACL is set to **Active**, the **Set Bill-To** button will be disabled at **Billing Manager**.
- When the ACL is set to **Inactive**, the **Set Bill-To** button will be enabled at **Billing Manager**.



## Access Control List Administration (Advanced)

Groups and Access Controls (Add New Group) (Remove Group)

Accounting-addonly(Edit)  
Accounting-write(Edit)  
Admission-write(Edit)  
Admit Discharge-write(Edit)  
Analytical Reports Admin-write(Edit)  
Auditor-readonly(Edit)  
Auditor-write(Edit)  
Clinic Admin-write(Edit)  
Clinicians-addonly(Edit)  
Clinicians-write(Edit)  
Delete Access-write(Edit)  
Delete Claims-write(Edit)  
Emergency Login-write(Edit)  
EnSoftek Administrators-write(Hide)

Active	Inactive
<p><b>Accounting</b></p> <p>Manage Rate Master Accounting Period Management Closing/Re-opening Accounting Period Billing (write optional) Billing Error Reports Contract Manager Authorize - delete claims Price Discounting EOB Data Entry Setting ERA processing options Go to Feesheet GL Interface/Crosswalk</p>	<p><b>Accounting</b></p> <p>Disable Delete Payment Disable Feesheet Financial columns at Clinical Reports <b>Hide access to Set Bill-To at Billing Manager</b> Hide Payment Collection at Appointments Hide/Show the Finacial Columns at Provider Service Report Process Payments</p> <p><b>Administration</b></p> <p>Patient Chart - Any Messages Analytical Reports Authorize - Edit EDI Fields Authorize - delete EDI records</p>

# Made Various Adjustments to the Payments Page

**Core**

1. In the **Payments** page within the **Billing** tab, when viewing the **Allocation Details** of a **Payment**, there is now an additional column labeled **Adjustments**.
2. When choosing the filters on the **Payments** page, the **Pay Status** field now displays the following options:
  - Applied (previously **Fully Paid**)
  - Unapplied
  - Refund

Payments / Refunds

SEARCH PAYMENT ERA POSTING New Payment

**Payment List**

Allocation Details						
Individual	PID	Service Date	Encounter	Allocated Amt	Adjustments	
Orange Cabs	29150	2022-04-19	849924	10.00	10.00	

Check/Ref Number:

Pay Status:

Facility:

Search Print CSV Export

	Pay Status	Payment	Undistributed	Check Status	Refund Status	Payment Received By
<input type="checkbox"/>	Unapplied	550.00	540.00	Receipt		Administrator, Ensoftek
<input type="checkbox"/>	Unapplied	550.00	550.00	Receipt		Administrator, Ensoftek
<input type="checkbox"/>	Applied	250.00	0.00	Receipt		Administrator, Ensoftek

# Added Facility Type in the Eligibility & Benefit Requests Page

Core

On the **Eligibility & Benefit Request(s) And Response(s)** page, the **Program** field will now also display the **Facility Type** next to the **Facility Name**.

The screenshot shows the 'Eligibility & Benefit Request(s) And Response(s)' form. It includes fields for 'From' and 'To' dates, 'Insurance Type' (with options: Group Health, TPL, Commercial, Medicaid, Medicare), 'Provider' (Boss, Harry), 'Payer' (with options: Good Insurance, Quartz, Test Ins 2, UHC Oxfords Health Pla'ns, UMR), 'X12 Partner' (MMEE Real Time Request), and 'Program' (with options: 11Semifinal AFRH Billing (Residential), 1Save NatureEnvironment (Mental Health), AFRH @ 2020 (Residential), AFRH New Billing Changes (Residential), AFRH New Facility). The 'Program' field is highlighted with a green box, and the 'AFRH @ 2020 (Active)' option is selected. There is also a checkbox for 'licants'. At the bottom, there are buttons for 'Search Archived Results', 'Submit Eligibility & Benefits Request', 'Save Filters', and 'View Saved Filters'.

# Reports

## Made Various Adjustments to the Prescriptions and Dispensations Page



In the **Reports** tab, select **Rx** from the navigation menu. This will take you to the **Prescriptions and Dispensations Report** page. The following changes have been made:

- Additional column to display the associated **Pharmacy**
- Additional column to display the name of the **Prescriber**
- Additional **Prescriber** field to filter your search

Report - Prescriptions and Dispensations

Prescription Date From: 2022-04-01 Prescription Date To: 2022-04-25

User Facility:  Drug:  Lot:

Individual:  Prescriber:

Search  
Print  
CSV Export

Records: 1

First Name	Last Name	PID	Prescriber	Pharmacy	Date of Prescription	RX	Drug Name	NDC	Units	Refills	Instructed	Qty	Manufacturer	Lot
Power pop	Plant uop	28795	Administrator, Ensoftek	Patterson Health Care Abilene	2022-04-18	847967	acetaminophen	36800057953	120 mg	4	1 twice a day			

Search Print CSV Export

## Added a Column in the Patient Receipts by Provider Report



In the **Patient Receipts by Provider** report, there is now a **Date of Service** column to display the date.

**Report - Individual Receipts by Provider**

By:  From:  To:

Encounter Facility:  Encounter Provider:   Include Inactive users

Payment Method:  Service Code :  Diagnosis Code :

Details  Procedures  Insurance

Search  
Print  
CSV Export

Records: 33

Practitioner	Individual	Date Of Service	Post To Date	Received	Check#
Administrator, Ensofek	Faith, Allan	2022-04-11	2022-04-11	250.00	
	Butler, Jason	2022-04-12	2022-04-12	50.00	
	Matt, Hart	2022-04-13	2022-04-13	250.00	
	Alle 1, Vaishali 1	2022-04-14	2022-04-14	10.00	
	Clark, Victor	2022-04-14	2022-04-14	250.00	
	Cabs, Orange	2022-04-14	2022-04-19	2.00	
	Cabs, Orange	2022-04-19	2022-04-19	10.00	Pay - ABCDEFGHIJ
	Ragav, Collection	2022-04-18	2022-04-19	250.00	
	Alle 1, Vaishali 1	2022-04-20	2022-04-20	25.00	



## Various Adjustments Made to the 'In Collections' Feature

Core  Setup

1. When viewing the results on the **Collections/Aging Report** page, there is now an option to flag specific **Encounter(s)** as **In Collections (IC)**. This will be removed once the balance of the **Encounter** is zero.

**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 Columns.

Report By:  Service Date From:  Service Date To:   
Date Of Service:  2021-10-01 2022-04-25

Facility:  Provider:  Individual:   
1Save NatureEnvironment First,Last(PID/HRN)

Whether Insured:  Insurance:  Report Type:  Invoice Details:   
All Open

Age By:  Group By:  Days  Months Aging Columns:   
Service Date 3

Manage Column(s)

Without Update

Name	SSN	Phone	Follow Up Reason	Invoice	Svc Date	Charge	Adjust	Paid	Balance	Apr 22	Mar 22	Feb 22+	Prv	Sel
10, Windows	XXX-XX-1111					400.00	0.00	0.00	400.00	150.00	250.00	0.00		IC
123, 456						200.00	0.00	0.00	200.00	0.00	0.00	200.00		<input type="checkbox"/>
123, Test						300.00	0.00	0.00	300.00	0.00	0.00	300.00		<input type="checkbox"/>

2. When viewing **Collections**, there is a red 'IC' displayed to indicate that the client is **In Collection**.
  - a. A new field to filter a search labeled **In Collections** with the following options:
    - i. All
    - ii. Patients in collection
    - iii. Patients not in collection
3. After the **Total Patients** field, the **Total Amount to collect for the reporting period** will be displayed, followed by the **Amount in collection** and the **Amount not in collection**.

## Added Additional Columns in the Appointment Report

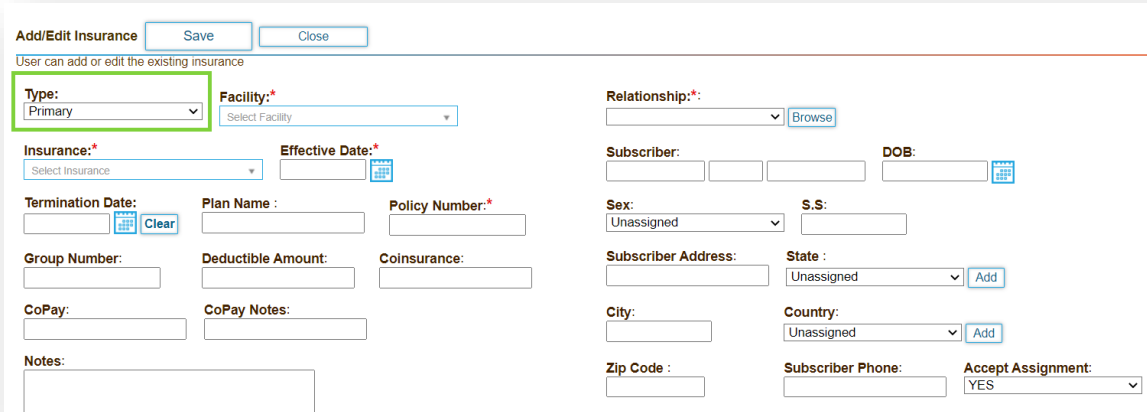
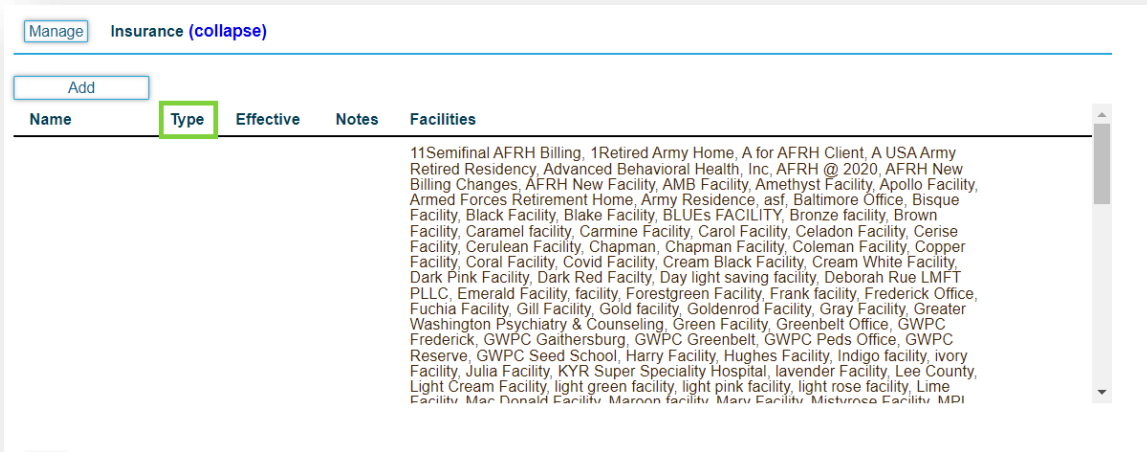
Core

When viewing the **Appointment Report**, there are now additional columns to display the **Duration** and **Place of Service** of an appointment.

# Added the Function to Edit a Funding Source After it is Entered

✓ Core

In the **Funding Source** feature, there is now the ability to edit the **Funding Source**.



# Administration

## Improvements Made to the MOTS Mapping Interface

### ✓ Core

1. The enhanced **MOTS** mapping interface now has the ability to pull information from various versions of different forms.
2. Updating fields in the **MOTS** mapping interface will now reflect immediately in the **MOTS** data export.
3. Added **From Date** and **To Date** fields at **MOTS** mapping interface to select the necessary date ranges.
4. Added the **Update ALL MOTS Records Mappings** button that will auto-update all **Failed** and **Not Submitted MOTS** transactions with the latest data.

**ADD Mapping**  
The output fields below under Interface Form Output Data will be auto-populated by the topics tables and fields selected for input fields. Click edit to begin your selections, and click apply to finalize. Click Cancel to close the selection box, and clear to unset any previous choices made. None of your selections will be final until the Save button has been clicked.

Save Cancel

From Date:   To Date:   MOTS Facility:

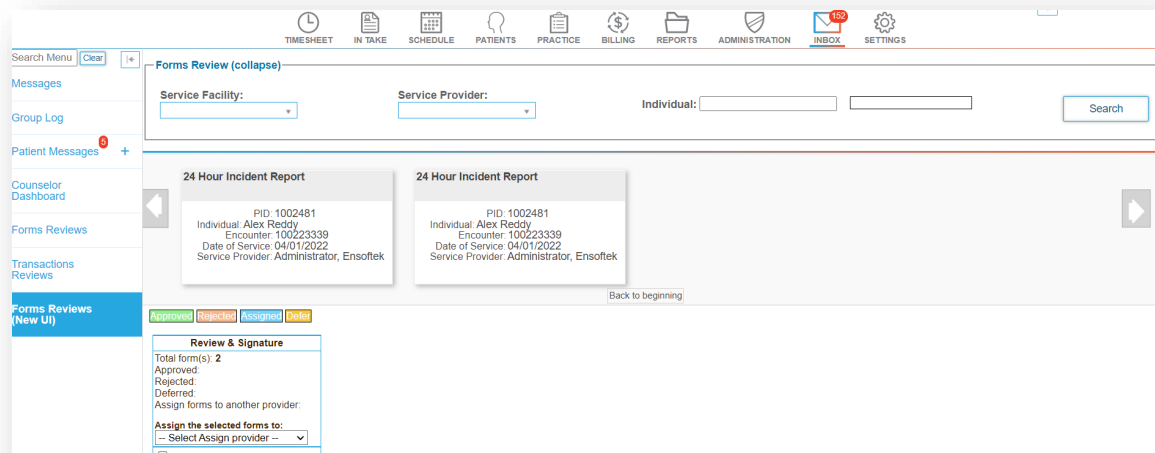
Interface Form Output Data	ADD	Source Data	
Substance Problem Primary(substance_problem_primary) Output Field		substance_problem_primary Input Field	Edit
Substance Problem Secondary(substance_problem_secondary) Output Field		substance_problem_secondary Input Field	Edit
Substance Problem Tertiary(substance_problem_tertiary) Output Field		substance_problem_tertiary Input Field	Edit
Age at first use Primary(age_first_use_primary) Output Field		age_first_use_primary Input Field	Edit
Age at first use Secondary(age_first_use_secondary) Output Field		age_first_use_secondary Input Field	Edit

# Inbox

## Added the Option to Set New UI as the Default View in Forms Review

Core  Setup

There is now the option to enable the **New UI (User Interface)** as your default view for **Forms Review**, rather than having to open the **New UI** manually. When enabled, all places in DrCloudEHR where you would see Form Reviews will display the **New UI** automatically.

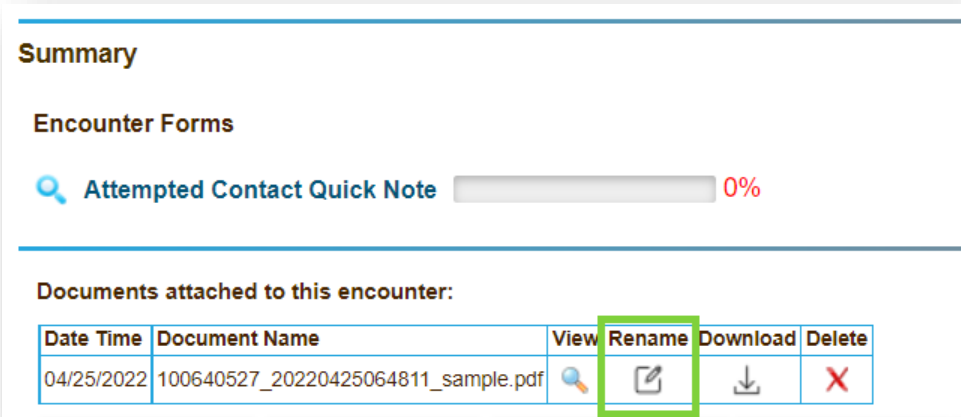


# Encounter Summary

## Rename an Uploaded Document in an Encounter Summary

 **Core**

When viewing an **Encounter** form, there is now an option to **Rename** the document once it has been uploaded successfully. When the **Encounter** is **Closed**, only the **View** and **Download** icons will be displayed on the **Encounter Summary** page.



The screenshot shows the 'Summary' section of an 'Encounter Summary' page. Under 'Encounter Forms', there is a progress bar for 'Attempted Contact Quick Note' at 0%. Below this, a section titled 'Documents attached to this encounter:' contains a table with the following data:

Date Time	Document Name	View	Rename	Download	Delete
04/25/2022	100640527_20220425064811_sample.pdf	