

DrCloudEHR™ February Release Notes

Release to Staging Site – January 30, 2023 Release to Production Site – February 05, 2023

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Overview

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





Available to all users when released



Some setup is required after the release

Dependent on the activation of other feature(s)



Requires purchase and additional setup

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

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



Patients

Option to Hide Staff Assessment Section in Group Therapy Note form

Core 🎝 Setup

DrCloudEHR customers can request DrCloudEHR Client Services to hide the **Staff Assessment** section within the **Group Therapy Note** form. When enabled, all the radio buttons in this section are hidden.

Save Credit Card data in a PCI-DSS Compliant manner

Core 🏟 Setup

Customers that use integrated OpenEdge Credit Card processing within DrCloudEHR can now save credit card numbers for later use. This data is saved in a PCI-DSS compliant manner. You can access the **Add New Credit Card** button on the File tab at Patient Demographics \rightarrow Billing \rightarrow Credit cards.

Note: Credit cards on file tab is visible only when OpenEdge is enabled at Practice \rightarrow Administrative \rightarrow Practice \rightarrow Payment Gateways

Card Number Expiry Date Label No Result Found.	Saved Cards	Add New Credit Card			
	Card Number No Result Found	I.	Expiry Date	Label	_

New Option to Restrict Users from being able to edit or delete Admit/Discharge records

Core

A new ACL (Access Control List) is now available to restrict select users from editing Admit/Discharge records. For these select users, the **Edit** and **Delete** buttons will not be available against both admit and discharge records and the **Discharge** button will be hidden against admit records.

Note: All users are in the ACL by default so they can edit the records. Remove the ACL from a user's list if you would like to restrict them from being able to edit these records.

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Practice

Option to include custom demographic fields in Golden Thread Rule Alerts

Core 🏟 Setup

Authorized users can configure golden thread alerts to include custom demographic field information. Simply choose the Patient Demographics field from the list when setting up a Golden Thread Rule.

Step 9: Message To Display When Dula	Faile	
step o. wessage to Display when Rule	rais	
	Custom Message Demographics	Field
lessage To Display:*	Select Demographics Field 🗸	
<u>VOTE:</u> Please make a note that, Golde	title	hen the rule does not satisfy.
Step 9: Apply GTR on selected age or a	language financial	
Specific Age OSpecif	fname	Clinic has to select a field from the
NOTE: If no selection, by default all pat	mname	drop down.
tep 10: Action To Take When Rule Fai	street	
Block from being billed	postal_code city	
	state	
Update	drivers_license	
	occupation	
perspeciality Hospital	phone_home	
O. BIL CDS/Eleartime	phone_contact	
perspeciality Hospital	phone_home phone_biz phone_contact	



Billing

A new status column was added to Claims Manager

Core

Now authorized billing users can view claim status history in the Claims Manager and Encounter Details.

. Sort By Encounter Date	5. Apply	r and Refresh	_		Cilent: Ensoftek Admin Ins1: VALUE OP Provider: Ensoftek Admin Ins2: CIGNA BEI Invoice: 1002700.100173985 Svc Date: 01/18/2023 Last Bill Date: 01/18/2023
Encounter Id	Claim No: P-1002700	D-1002054202(TEST)			
Patient Last Name	Status	Date	View	Us	Billing Notes:
Patient First Name	Updated	01/18/2023 16:15:16	đ	Ad	Add Billing Notes
Oldest First	Submitted	01/18/2023 15:54:09	đ	Ad	► Claim Details
ulk Actions					Claim Date Claim ID Status
Use buttons to apply actions to all selected items at once.					01/18/2023 3:54 PM P-1002700-1002054202(TEST) Updated on 2023-01-18 16:15:16 @
Submit Claim(s) Print Claim(s) Get Real					Code Charge Balance By/Source Done With Deposit Date Post to Date Date of Entry Pay
Total Record(s): 212					
Claim No Status					urd
□					DP

Mark Encounter as 'Billed' from Feesheet and Batch Close Encounter

Core

Authorized Billing Users can now mark encounters as Billed using the 'Mark as Cleared' button within both the **Feesheet** and **Batch Closing/Reopening Encounter** reports.

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Option to rebill an encounter to the same payer or indicate next-level billing in the Payment Allocation Screen

Core

Authorized users can now indicate next-level billing or indicate rebill for an encounter. Rebill will indicate that the encounter needs to be rebilled to the same payer (primary, secondary, or tertiary).

On the Invoice Manager page

At the Payment Allocation screen

Cancel		one With: Select an o	ption 🗸 Rebill	: 🗆			
Adj Group Code Rebill Follow-up Rea:	dj mount	Adj Reason	Adj Group Code	Deductible	Recoupment	Done With	Rebill
			~			None 🗸	
			~			None 🗸	
		0		0	0		

New option to add NDC Code information to CPT4 codes

Core

Authorized billing staff can now add NDC code information to the CPT4 codes, similar to HCPCS codes. The NDC information will appear in the HCFA claim form when the claim is generated or submitted.

Feesheet View

Source	Туре	Code	Modifiers	Unit	Price Adj Amt	Adj Type
ු	CPT4	90834			180	Patient 🗸
		NDC: (45678-9876-34	Qty:	2 ML 🗸	
ු	HCPCS	H0004			65	Patient 🗸
		NDC: (12345-6789-09	Qty:	3 Grams V	
ු	HCPCS	H0004	HA		50	Patient 🗸
	- [NDC: (23456-7890-01	Qty:	4 Milligrams 🗸]
	ICD10	Z63.1				

HCFA Claim Form View

				17a.	
				17b.	NP
19. ADDITIONAL CLAIM INFORMA	ATION (Designat	ed by	NUCC)	
21. DIAGNOSIS OR NATURE OF I	B.	OR INJ	JRY. (F	Relate A-L to serv	ice line bel
E	E L			G. К.	=
24. A.		в.	C.	D. PROCEDURES	, SERVICES
DATE(S) OF SERVICE From: To:		Place Of Service	EMG	CPT/HCPCS	A
DC Qual: N4 NDC Code: 123456	78909	NDC Qty	: 3 ND	C Meas: GR	
2023-01-20		03	Ν	H0004	
DC Qual: N4 NDC Code: 234567	89001	NDC Qty	: 4 ND	C Meas: ME	
2023-01-20		03	Ν	H0004	HA
DC Qual: N4 NDC Code: 456789	87634	NDC Qty	: 2 ND	C Meas: ML	
2023-01-20		03	N	90834	
25. FEDERAL TAX I.D. NUMBER 343454366665		S	SN I	EIN 26. PAT NO. P-1002	TENT'S ACC 723-10020562
Date Of Initial Treatment: 2	023-01-2	0 🔐		32. SEF	RVICE FACI
Date Last Seen: 2 Supervision Physician:	023-01-2	0		Progra	m Name: Address:



Filter encounters based on Client First name or Last name in Billing Manager and Denials Manager

Core

Authorized users can now filter encounter results using the **Patient's First Name** and/or **Patient's Last Name** in the Billing Manager and Denials Manager.

Note: An alphabet range can also be entered: K-Z

Search 1. Available Search Criteria Select a column/field name to begin adding it to filter list. Billing Units Charge Coded Claim Type Client First Name	2. Value Select a value(s) to add to filter list. Client First Name [K-Z]	3. Review Current Criteria Review "criteria = value" pairs. Select and remove unv criteria. Date of Service = Today Client First Name = K-Z
Client Id		

Filter claims using the 'Current Claim Status' filter in Claims Manager

Core

Authorized staff can now search for claims using claim status filters in the Claims Manager.

illing Dashboard lasters +	1. Available Search Criteria Select a column/field name to begin adding it to filter list.	 Value Select a value(s) to add to filter list. Current Claim Status 	 Review Current Criteria Review "criteria = value" pairs. Select and remove unwar criteria.
	Client Last Name	O All	Claim date = Custom
lling Manager	Client Name	O Not Submitted	Current Claim Status = Rejected
laims Manager	Current Claim Status	O Submitted	
	Encounter Id	O Re-submitted	
enials Manager	HL7 Partner	O Accepted	
e Sheet		Rejected	
		O Created	Remove Selected
eckout		O Updated	Show Current Status Only
ror Reports +		O Archived	Show our encourse of a control of the
		O Other	



List adjustment codes using description text in Adjustment Report

Core

Authorized users can now search for specific adjustment codes in the **Adjustment Report** simply by entering the text they want to search by.

Individual: First,Last(PID/	HRN)				Con	ab Drint			
Insurance:	Description	Select			- Sear	en Print			
		charges			CSV E	port			
Encounter Facility:	cility(s)	45 - Charges arrangement	exceed your contracted/I	egislated fee					
Records: 2		Charges excee	ed our fee schedule or m	aximum allowable					
RES# LAST NAME	FIRST NAME P	R 24 - Payment	for charges adjusted.		SURANCE	REASON	ADJ GROUP CODE	DATE OF ENTRY	A
1004698 Peetz	Oaklee K	40 - Charges (45 - Charges (59 - Charges (do not meet qualificat exceed your contracted are adjusted based on		If Pay 0% Fees	Charges exceed your contracted/ legislated fee		12/06/2022 02:10:30	2
	к	eltner, Paul	P-IMMS	1004698.100168898	Self Pay 0% Fees	Charges exceed your contracted/ legislated fee arrangement		12/06/2022 02:10:30	2.

Added ability to manually update claim status to 'Archived'

Core

Authorized users can now use the **Archive Claim(s)** option in the Claims Manager to archive claims. Claims will be marked with the new **Archived** status and will be excluded from search results.

Note: Only claims with Rejected Status can be archived.

Client Last Name	Current Claim Status	Claim date = Custom
Client Name	⊖ All	Current Claim Status = Archived
Current Claim Status	O Not Submitted	
Encounter Id	O Submitted	
HL7 Partner	O Re-submitted	
Paver Level	O Accepted	
	O Rejected	
	○ Created	Remove Selected
	O Updated	Show Current Status Only
	Archived	
	O Other	
4. Sort By	5. Apply and Refresh	
Encounter Date	Search CSV Export	
Encounter Id		
Patient Last Name		
Patient First Name		
Oldest First		
O Newest First		
Bulk Actions		
use puttons to apply actions to all selected items at once.		
Submit Claim(s) Print Claim(s) Get Real Time Claim(s) Status	Delete Claim(s) Archive Claim(s)	
1.		



Adding 'Post to Date' & 'Date of Entry' to the Invoice Page

Core 🏟 Setup

Customers can now request DrCloudEHR Client Services to enable displaying the **Post to Date and Date** of Entry fields on the EOB \rightarrow Invoice.

Note: The Date field has been renamed to Deposit Date.

ode Charge Balance By/Source Done With	Deposit Post to Date of Pay Date Date Entry	Adjust Reason	Needs Next Adj Group Code Level Billing
1887:HF 77.00 Ins1	2022- 12-20 12/20/2022 12/20/2022	1.00 Discount	Other Adjustment
76.00 Insurance 1 🗸 None	·	W (•) (• •) 🔲

Patient Portal

Option to remove the Inbox tab in the Patient Portal

Core 🏟 Setup (\$) Add-on

Customers can now request DrCloudEHR Client Services to turn the Inbox tab off in the Patient Portal.

Reports

Clearing 'Amounts Due' and 'Billed to Primary' statuses when secondary billing is not needed.

Core

The **Billed To** column in the Provider Service Report was implemented. When claims are submitted by primary, secondary, or tertiary insurance, the appropriate columns are displayed. We are showing the Billed To column status as **Empty** when Encounters are marked as clear and unbilled.

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