



DrCloudEHR™
February Release Notes

Release to Staging Site – January 30, 2023

Release to Production Site – February 05, 2023

Table of Contents

- Patients** 4
 - Option to Hide Staff Assessment Section in Group Therapy Note form 4
 - Save Credit Card data in a PCI-DSS Compliant manner 4
 - New Option to Restrict Users from being able to edit or delete Admit/Discharge records..... 4
- Practice** 5
 - Option to include custom demographic fields in Golden Thread Rule Alerts 5
- Billing** 6
 - A new status column was added to Claims Manager 6
 - Mark Encounter as 'Billed' from Feesheet and Batch Close Encounter 6
 - Option to rebill an encounter to the same payer or indicate next-level billing in the Payment Allocation Screen 7
 - New option to add NDC Code information to CPT4 codes 7
 - Filter encounters based on Client First name or Last name in Billing Manager and Denials Manager 8
 - Filter claims using the 'Current Claim Status' filter in Claims Manager 8
 - List adjustment codes using description text in Adjustment Report..... 9
 - Added ability to manually update claim status to 'Archived' 9
 - Adding 'Post to Date' & 'Date of Entry' to the Invoice Page 10
- Patient Portal**..... 10
 - Option to remove the Inbox tab in the Patient Portal..... 10
- Reports**..... 10
 - Clearing 'Amounts Due' and 'Billed to Primary' statuses when secondary billing is not needed. 10

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



Dependent on the activation of other feature(s)



Some setup is required after the release



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.

Patients

Option to Hide Staff Assessment Section in Group Therapy Note form

Core **Setup**

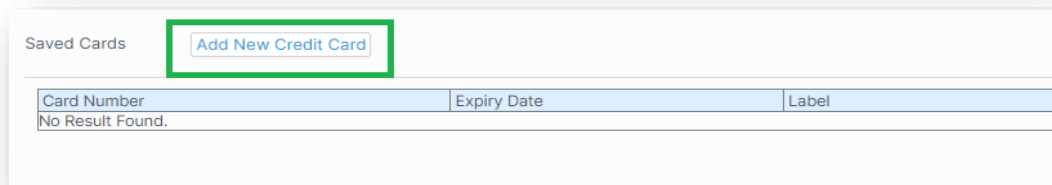
DrCloudEHR customers can request DrCloudEHR Client Services to hide the **Staff Assessment** section within the **Group Therapy Note** form. When enabled, all the radio buttons in this section are hidden.

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 → Billing → Credit cards.

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



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.

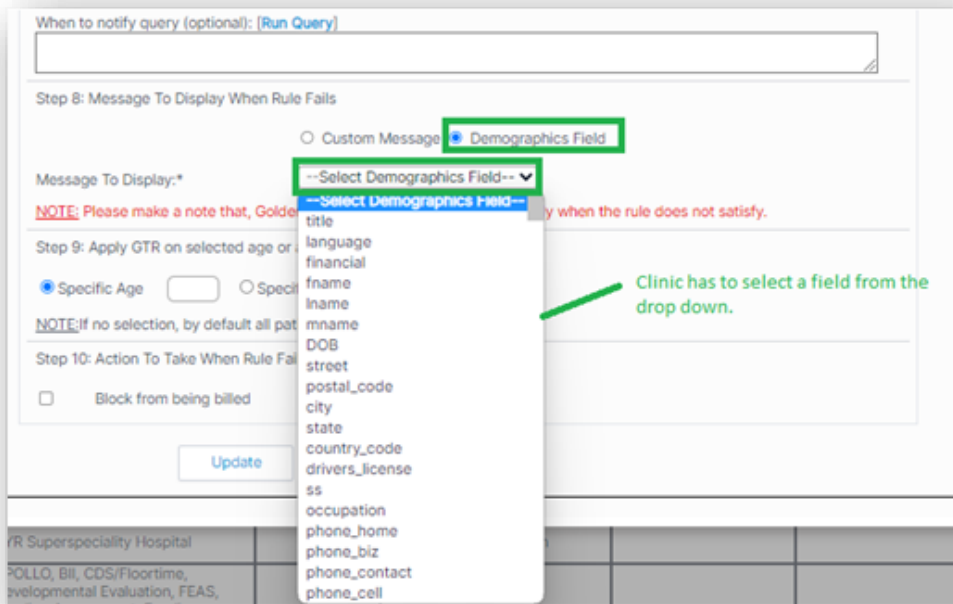
Note: All users are in the ACL by default so they can edit the records. Remove the ACL from a user's list if you would like to restrict them from being able to edit these records.

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.

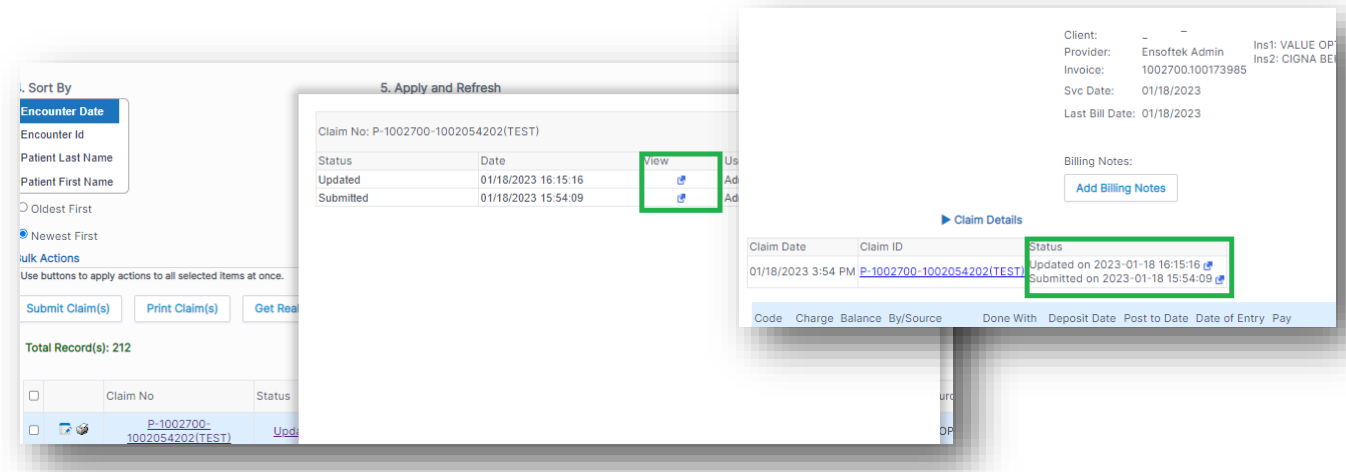


Billing

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.



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.

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

Adj Group Code	Rebill	Follow-up Reason
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

At the Payment Allocation screen

Adj Amount	Adj Reason	Adj Group Code	Deductible	Recoupment	Done With	Rebill
					None	<input type="checkbox"/>
					None	<input type="checkbox"/>
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	Type	Code	Modifiers	Unit Price	Adj Amt	Adj Type
CPT4	90834			180		Patient
		NDC: 45678-9876-34			2	ML
HCPCS	H0004			65		Patient
		NDC: 12345-6789-09			3	Grams
HCPCS	H0004	HA		50		Patient
		NDC: 23456-7890-01			4	Milligrams
ICD10	Z63.1					

HCFA Claim Form View

19. ADDITIONAL CLAIM INFORMATION (Designated by NUCC)

21. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. (Relate A-L to service line below)

24. A. DATE(S) OF SERVICE From: To: B. Place Of Service C. EMG D. PROCEDURES, SERVICES

NDC Qual: N4 NDC Code: 12345678909 NDC Qty: 3 NDC Meas: GR
 2023-01-20 2023-01-20 03 N H0004

NDC Qual: N4 NDC Code: 23456789001 NDC Qty: 4 NDC Meas: ME
 2023-01-20 2023-01-20 03 N H0004 HA

NDC Qual: N4 NDC Code: 45678987634 NDC Qty: 2 NDC Meas: ML
 2023-01-20 2023-01-20 03 N 90834

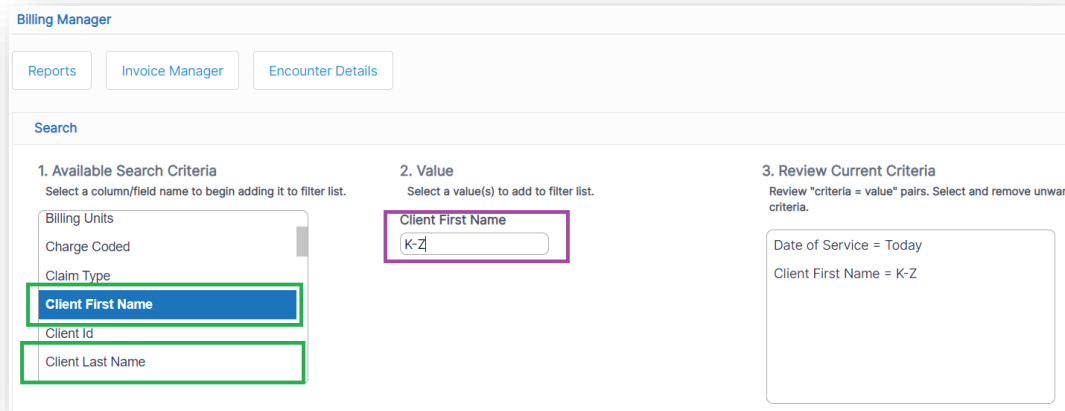
25. FEDERAL TAX I.D. NUMBER 343454366665 SSN EIN
 26. PATIENT'S ACC NO. P:1002723 10020562
 Date of Initial Treatment: 2023-01-20
 Date Last Seen: 2023-01-20
 Supervising Physician: Program Name: Address:

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.

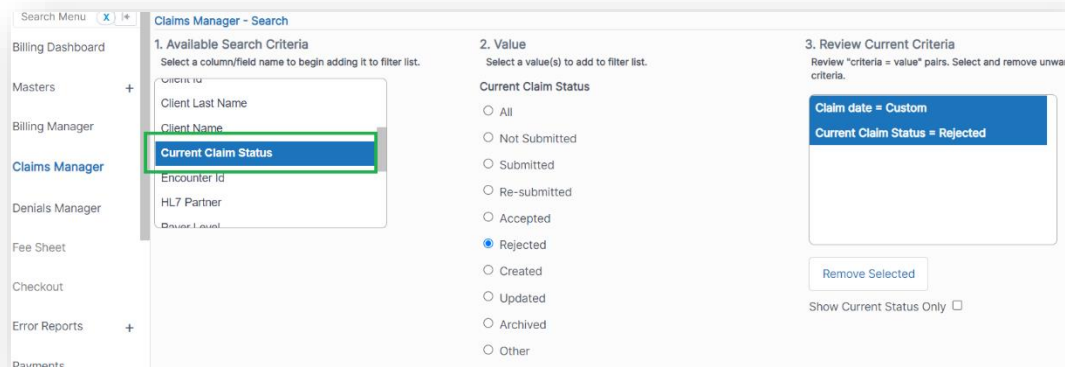
Note: An alphabet range can also be entered: K-Z



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

Core

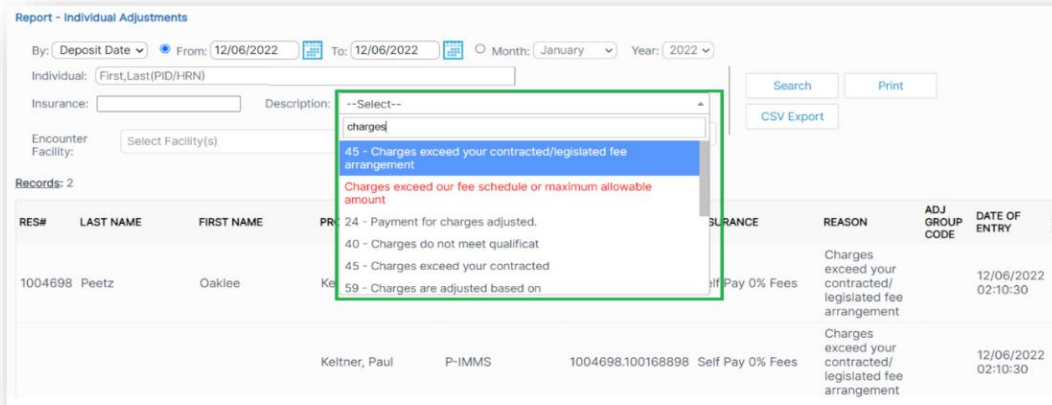
Authorized staff can now search for claims using claim status filters in the Claims Manager.



List adjustment codes using description text in Adjustment Report



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

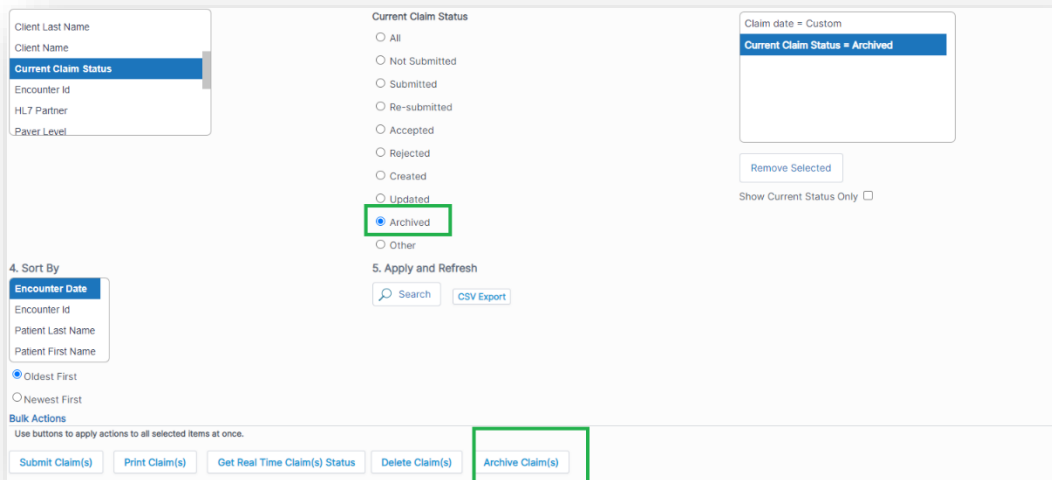


Added ability to manually update claim status to 'Archived'



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.



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 → Invoice.

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

Code	Charge	Balance	By/Source	Done With	Deposit Date	Post to Date	Date of Entry	Pay	Adjust	Reason	Adj Group Code	Needs Next Level Billing
90887HF	77.00		Ins1	None	2022-12-20	12/20/2022	12/20/2022		1.00	Discount		<input type="checkbox"/>
	76.00		Insurance 1	None						W		<input type="checkbox"/>

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.

Date	Client	DOB	PID	Enc #	Facility	Service Code(s)	Funding Source	Funding Source Type	Encounter Type	Billed To
01/02/2023 10:38 PM	Pad, Think	05/03/2004	10028	100173820	Save Nature Clinic	90283	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	
01/02/2023 10:45 PM	Pad, Think	05/03/2004	10028	100173823	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins3
01/02/2023 11:08 PM	Pad, Think	05/03/2004	10028	100173831	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
01/03/2023 1:23 AM	Pad, Think	05/03/2004	10028	100173835	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
01/03/2023 1:31 AM	Pad, Think	05/03/2004	10028	100173836	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins2
01/03/2023 2:42 AM	Pad, Think	05/03/2004	10028	100173843	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
01/03/2023 3:07 AM	Pad, Think	05/03/2004	10028	100173849	CDS/Floortime	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
01/03/2023 3:16 AM	Pad, Think	05/03/2004	10028	100173853	APOLLO	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
01/03/2023	Pad, Think	05/03/2004	10028	100173854	APOLLO	90283	Primary:	Commercial	Billable	Ins2