

# DrCloudEHR™ February Release Notes

Release to Staging Site – January 29, 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			
		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 8: Message To Display When Rule	Faile		
step o. wessage to Display When Rule	rais		
	O Custom Message Bemogra	phics Field	
Message To Display:*	Select Demographics Field 🗸		
<u>VOTE:</u> Please make a note that, Golde	Select Demographics Held title	y when the rule does not sat	tisfy.
Step 9: Apply GTR on selected age or	language financial		
Specific Age     O Specifi	4		select a field from the
VOTE: If no selection, by default all pat	mname	drop down.	
Step 10: Action To Take When Rule Fai	DOB street		
<ul> <li>Block from being billed</li> </ul>	postal_code city		
	state		
Update	country_code drivers_license		
	ss occupation		
perspeciality Hospital	phone_home		
O, BII, CDS/Floortime,	phone_biz phone_contact		
pmental Evaluation, FEAS,	phone_cell		



## 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	5. Appl	y and Refresh			Insolve Admini Ins2: CIGNA I Invoice: 1002700.10017398 Svc Date: 01/16/2023
Encounter Date				_	Last Bill Date: 01/18/2023
Encounter Id	Claim No: P-100270	00-1002054202(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	
Newest First					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 @ Submitted on 2023-01-18 15:54:09 @
Submit Claim(s) Print Claim(s) Get Real					Code Charge Balance By/Source Done With Deposit Date Post to Date of Entry Pay
Total Record(s): 212					_
Claim No Status					urd
					OP

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				icel Dor	ne With: Select an o	ption <b>v</b> Rebil	: 🗆			
	Adj Group Code	Rebill	p 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
ള	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 V
	- [	NDC: (	23456-7890-01	Qty:	4 Milligrams 🗸	
	ICD10	Z63.1				

#### **HCFA Claim Form View**

				17a.	
				17b.	NP
19. ADDITIONAL CLAIM INFORMA	TION (	Designat	ed by	NUCC)	
21. DIAGNOSIS OR NATURE OF II A. Z631	B.	OR INJ	JRY. (F	Relate A-L to serv C.	ice line bel
E	F. [			G	=
24. A.		в.	C.	D. PROCEDURES	, SERVICES
DATE(S) OF SERVICE From: To:		Place Of Service	EMG	CPT/HCPCS	A
IDC Qual: N4 NDC Code: 123456	78909	NDC Qty	: 3 ND	C Meas: GR	
2023-01-20		03	Ν	H0004	
IDC Qual: N4 NDC Code: 234567	89001	NDC Qty	: 4 ND	OC Meas: ME	
2023-01-20	1	03	Ν	H0004	HA
IDC 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 3434543868665		S	SN I	NO.	TIENT'S ACC 723-10020562
Date Of Initial Treatment: 20	023-01-2	0 👬		32. SE	RVICE FACI
Date Last Seen: 20 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 Client Last Name		

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 Masters +	Available Search Criteria     Select a column/field name to begin adding it to filter list.     Origin tru	<ol> <li>Value Select a value(s) to add to filter list.</li> <li>Current Claim Status</li> </ol>	<ol> <li>Review Current Criteria Review "criteria = value" pairs. Select and remove unwar criteria.</li> </ol>
	Client Last Name	O All	Claim date = Custom
lling Manager	Client Name	O Not Submitted	Current Claim Status = Rejected
aims 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	
avments		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)			Search	Print			
Insurance: Desc	ription:Select		search	Print			
	charges		CSV Expo	ort			
Encounter Select Facility(s) Facility:	45 - Charges exceed arrangement	your contracted/legislated fee					
Records: 2	Charges exceed our amount	ee schedule or maximum allowable					
RES# LAST NAME FIRST NAME	PRC 24 - Payment for cha		SURANCE	REASON	ADJ GROUP CODE	DATE OF ENTRY	A
1004698 Peetz Oaklee	40 - Charges do not 45 - Charges exceed Ke 59 - Charges are adj	your contracted	∋lf Pay 0% Fees	Charges exceed your contracted/ legislated fee		12/06/2022 02:10:30	2
	Keltner, Paul P-	MMS 1004698.10016889	98 Self Pay 0% Fees	arrangement 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.

Int Last Name Claim Status Claim date = Custom Claim date = Custom
ient Name Current Claim Status = Archived
urrent Claim Status ONt Submitted
counter Id O Submitted
.7 Pather O Re-submitted
ver Level O Accepted
○ Rejected
Created Remove Selected
O Updated Show Current Status Only
Archived
O Other
Sort By 5. Apply and Refresh
counter Date Search CSV Export
counter Id
Last Name
titent First Name
Oldest First
Newest First
k Actions
e buttons 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)
Status         Delete Claim(s)         Archive Claim(s)



### 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.

de Charge Balance By/Source Done With	Deposit Post to Date of Date Date Entry	Pay Adju	ust Reason	Adj Group Code Leve Billing
887:HF 77.00 Ins1	2022- 12-20 12/20/2022 12/20/2022	1.00	Discount	Other Adjustment
76.00 Insurance 1 🗸 None			W (	v) ( v) 🛛

## **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 <b>Q</b>	01/02/2023 10:38 PM	Pad, Think	05/03/2004	10028	100173820	Save Nature Clinic	90283	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	
rovider roductivity leport V2	R <b>Q</b>	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	R.	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		01/03/2023 1:23 AM	Pad, Think	05/03/2004	10028	100173835	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
	Q	01/03/2023 1:31 AM	Pad, Think	05/03/2004	10028	100173836	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins2
Progress Note	ю <b>р</b>	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	<b>Q</b>	01/03/2023 3:07 AM	Pad, Think	05/03/2004	10028	100173849	CDS/Floortime	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
Practice -	RQ\$	01/03/2023 3:16 AM	Pad, Think	05/03/2004	10028	100173853	APOLLO	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
	10	01/03/2023	Pad. Think	05/03/2004	10028	100173854	APOLLO	90283	Primary:	Commercial	Billable	Ins2