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DrCloudEHR™
February 2024 Release Notes

Release to Staging Site – January 28, 2024

Release to Production Site – February 4, 2024

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Overview

This document contains the Release Notes for February 2024. 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:

✅ **Core**

Available to all users when released

➕ **Add-on**

Dependent on the activation of other feature(s)

⚙️ **Setup**

Some setup is required after the release

💲 **Add-on**

Requires purchase and additional setup

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

If you have questions regarding staging sites or this release, please contact our support team at support@drcloudemr.com.

Patients

Updates to hide "Canceled Appointments" in Patient Demographics

✅ **Core**   ⚙️ **Setup**

DrCloudEHR now includes a new global flag, "Hide canceled type appointments on patient chart" to hide canceled appointments at Patient Demographics.
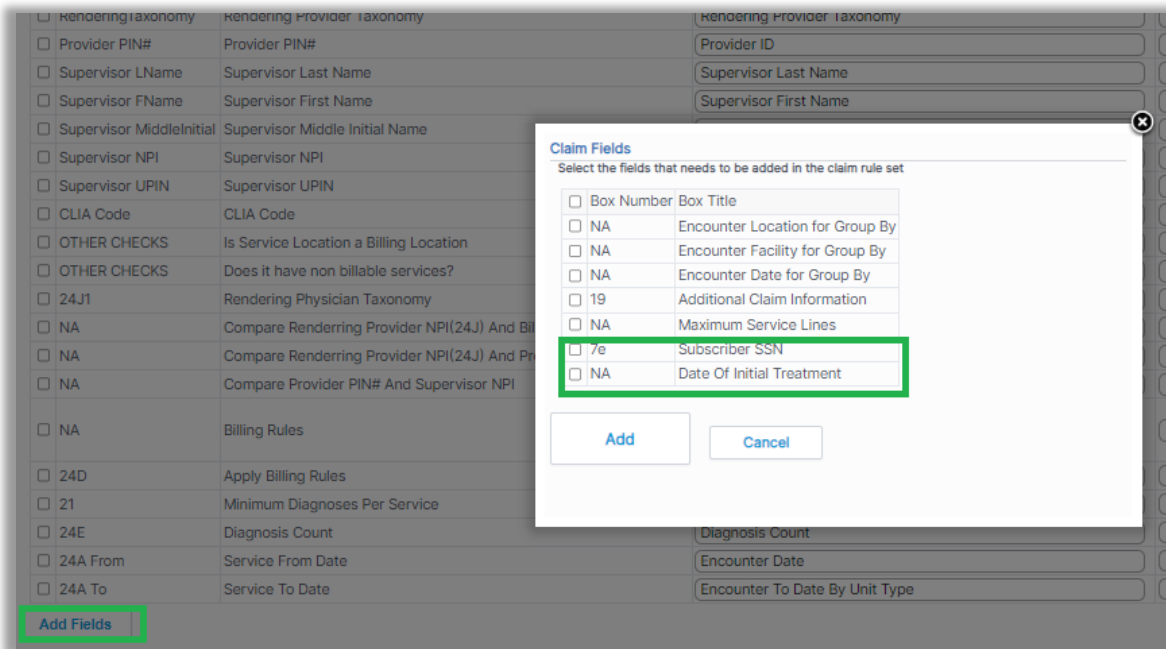
Billing

Ability to send Client's SSN and Date of Initial Treatment in 837

✅ **Core**   ⚙️ **Setup**

DrCloudEHR now can add "Subscriber SSN" and "Date of Initial Treatment" as the Claim rule fields to the HCFA Claim Rule at Practice-Administrative-Claim Rules.

Subscriber SSN: When this field is added to the claim rule set and if the SSN is on file, then it will be sent in the X12 with the segment REF*SY without the hyphens.

Date of Initial Treatment: If this is added to the claim rule set, the Date of Initial Treatment field in the HCFA form will be left blank and will not be sent in the X12. If present, then in the X12 the date will be sent with the DTP*454 segment after CLM segment.
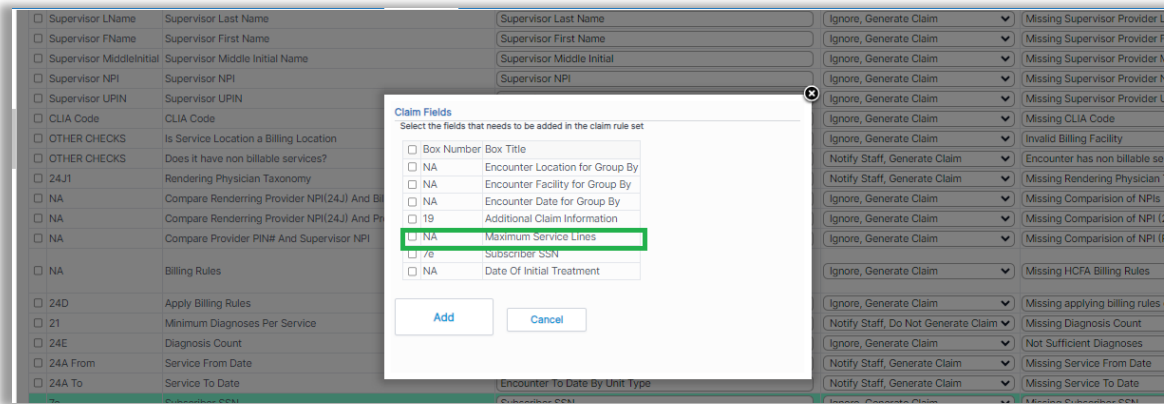

Note: Initially, the above claim rule fields will be displayed, as shown in the Screenshot. To add these fields to the Claim rule set, the user must click on the "Add Fields" button, select the fields and click on Add button.

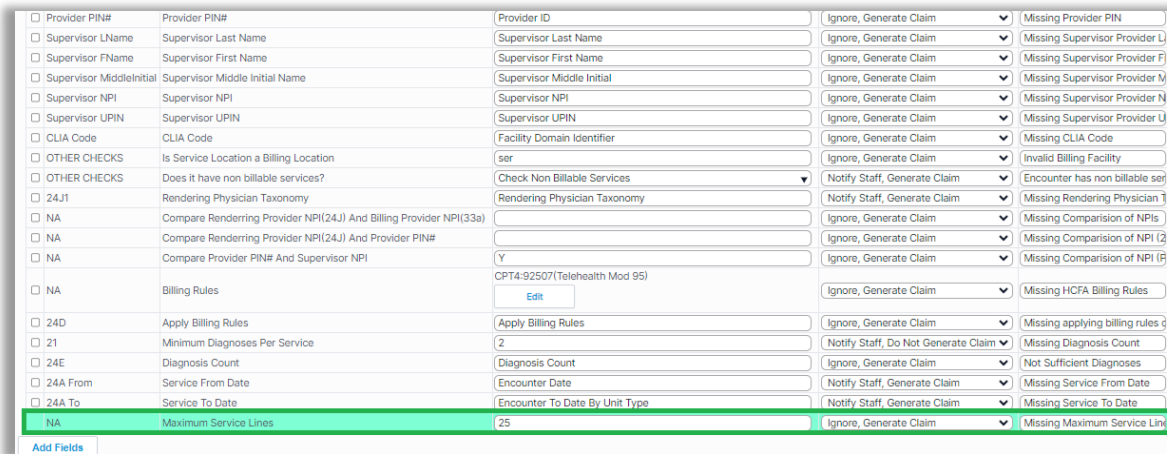## *Ability to limit the number of service lines being sent per claim*

✅ **Core** ⚙ **Setup**

DrCloudEHR now includes a claim field in the HCFA claim rule set as "Maximum Service Lines" (Ex: 1, 5, 10). Users can set the number of service lines per claim. If the field is not added to the claim rule set or not set to any value, the system will consider the default "Maximum allowed rows in HCFA box 24".

Note: Initially, the above claim rule fields will be displayed, as shown in the Screenshot. To add these fields to the Claim rule set, the user must click on the "Add Fields" button, select the fields and click on Add button.

Once added, the field will be added to the claim Rule set as shown below, and the user must click the Save button to add the field to the rule set. When the field is added to the rule set, the initial box value will be 25, the clinic can set it accordingly and save.

Practice

Streamlined, sending multiple forms to DrCloudEHR Patient Portal for Signatures

☑ **Core** ⚙ **Setup**

DrCloudEHR now includes a new checkbox to "Enable Patient Signature Request" at Practice->Administrative->Client portal forms.

When the user selects the checkbox and adds a form to the encounter without a patient signature, then the form will automatically go to the patient portal for the patient's signature.