

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:



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 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.

	Rendering Provider Taxonomy		Kendering Provider Taxonomy
Provider PIN#	Provider PIN#		Provider ID
Supervisor LName	Supervisor Last Name		Supervisor Last Name
Supervisor FName	Supervisor First Name		Supervisor First Name
Supervisor MiddleInitial	Supervisor Middle Initial Name		
Supervisor NPI	Supervisor NPI	Claim Fields	needs to be added in the claim rule set
Supervisor UPIN	Supervisor UPIN	Select the helds that	
CLIA Code	CLIA Code	Box Number	Box Title
OTHER CHECKS	Is Service Location a Billing Location		Encounter Location for Group By
OTHER CHECKS	Does it have non billable services?		Encounter Date for Group By
24J1	Rendering Physician Taxonomy	0 19	Additional Claim Information
	Compare Renderring Provider NPI(24J) And Bil	□ NA	Maximum Service Lines
	Compare Renderring Provider NPI(24J) And Pro	🗆 7e	Subscriber SSN
🗆 NA	Compare Provider PIN# And Supervisor NPI	□ NA	Date Of Initial Treatment
	Billing Rules	Add	Cancel
24D	Apply Billing Rules		
21	Minimum Diagnoses Per Service		
□ 24E	Diagnosis Count		Diagnosis Count
24A From	Service From Date		Encounter Date
C 244 To	Service To Date		Encounter To Date By Unit Type

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.

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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.

Provider PIN#	Provider PIN#	(Provider ID)	Ignore, Generate Claim 🔹 👻	Missing Provider PIN
Supervisor LName	Supervisor Last Name	Supervisor Last Name	Ignore, Generate Claim 🔹	Missing Supervisor Provider
Supervisor FName	Supervisor First Name	(Supervisor First Name	Ignore, Generate Claim 👻	Missing Supervisor Provider
Supervisor MiddleInitial	Supervisor Middle Initial Name	Supervisor Middle Initial	Ignore, Generate Claim 👻	Missing Supervisor Provider
Supervisor NPI	Supervisor NPI	(Supervisor NPI	Ignore, Generate Claim 👻	Missing Supervisor Provider
Supervisor UPIN	Supervisor UPIN	(Supervisor UPIN)	Ignore, Generate Claim 🔹	Missing Supervisor Provider
CLIA Code	CLIA Code	(Facility Domain Identifier	Ignore, Generate Claim 👻	Missing CLIA Code
OTHER CHECKS	Is Service Location a Billing Location	(ser) (Ignore, Generate Claim 🔹	Invalid Billing Facility
OTHER CHECKS	Does it have non billable services?	Check Non Billable Services	Notify Staff, Generate Claim 👻	Encounter has non billable s
24J1	Rendering Physician Taxonomy	(Rendering Physician Taxonomy)	Notify Staff, Generate Claim 🔹	Missing Rendering Physician
	Compare Renderring Provider NPI(24J) And Billing Provider NPI(33a)		Ignore, Generate Claim 🔹	Missing Comparision of NPI
🗆 NA	Compare Renderring Provider NPI(24J) And Provider PIN#		Ignore, Generate Claim 🔹	Missing Comparision of NPI
	Compare Provider PIN# And Supervisor NPI	(Y)	Ignore, Generate Claim 🔹	Missing Comparision of NPI
□ NA	Billing Rules	CPT4:92507(Telehealth Mod 95) Edit	Ignore, Generate Claim 👻	Missing HCFA Billing Rules
24D	Apply Billing Rules	(Apply Billing Rules)	Ignore, Generate Claim 🔹	Missing applying billing rules
21	Minimum Diagnoses Per Service	(2	Notify Staff, Do Not Generate Claim 🗸	Missing Diagnosis Count
24E	Diagnosis Count	(Diagnosis Count	Ignore, Generate Claim 💙	Not Sufficient Diagnoses
24A From	Service From Date	(Encounter Date)	Notify Staff, Generate Claim 🔹	Missing Service From Date
24A To	Service To Date	Encounter To Date By Unit Type	Notify Staff, Generate Claim 🔹	Missing Service To Date
NA	Maximum Service Lines	25	Ignore, Generate Claim	Missing Maximum Service L



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.

Save	Cancel	
	Form Name: Order:	14-Day Treatment Plan
	Portal Enable:	
Enable Patient S	ignature Request:	

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.

					0					
HOME CLI		visits	REPORTS	CCDA LOG	INBOX	BILLING		DOCUMENTS		
Encounter	Form Name	e		Form Cre	eated By	Forn	n Created On	Client Signature		
100181285	14-Day Tre	atment Pl	an	Admin, E	nsoftek	01/1	1/2024 11:02 PM	Patient	~	Ē
				,						4
Treatment Plan	n (Id)		C	Created By		Create	ed On	Client Signature		4
Treatment Plan	n (Id)		C	Created By The	re is no Trea	Create atment plan	ed On s to e-Sign	Client Signature		40
Treatment Plan	n (Id) Conser	ıt Form	C	Created By The Form Create	re is no Trea d By	Create atment plan	ed On s to e-Sign Form Created On	Client Signature Client Sig	nature	
Treatment Plan Encounter	n (Id) Conser	it Form	C	Created By Ther Form Create The	re is no Trea d By ere is no Co	Create atment plan	ed On s to e-Sign Form Created On s to e-Sign	Client Signature Client Sig	nature	
Treatment Plan Encounter	i (id) Conser	it Form	C	Created By Ther Form Create The	re is no Trea d By ere is no Co	Create atment plan nsent forms Date:	ed On s to e-Sign Form Created On s to e-Sign	Client Signature Client Sig	nature	