

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.

L Rendering axonomy	kendering Provider Taxonomy		Rendering 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	hat needs to be added in the claim rule set
Supervisor UPIN	Supervisor UPIN		
CLIA Code	CLIA Code		er Box Title
OTHER CHECKS	Is Service Location a Billing Location		Encounter Location for Group By Encounter Facility for Group By
OTHER CHECKS	Does it have non billable services?		Encounter Pacinty for Group By
24J1	Rendering Physician Taxonomy	0 19	Additional Claim Information
	Compare Renderring Provider NPI(24J) And Bil		Maximum Service Lines
	Compare Renderring Provider NPI(24J) And Pri	□ 7e	Subscriber SSN
🗆 NA	Compare Provider PIN# And Supervisor NPI	□ NA	Date Of Initial Treatment
🗆 NA	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
24A To	Service To Date		Encounter To Date By Unit Type

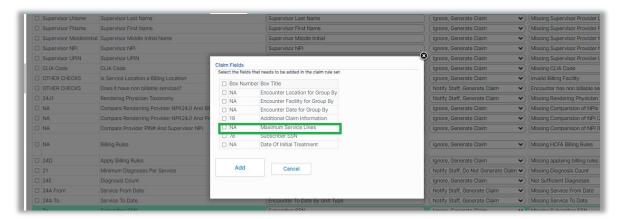
Note: Initially, the above claim rule fields will be displayed, as shown in the Screenshot. To add these fields to the Claim rule set, the user must click on the "Add Fields" button, select the fields and click on Add button.

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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.

То	Service to bate			
	Service To Date	Encounter To Date By Unit Type	Notify Staff, Generate Claim	Missing Service To Date
From	Service From Date	Encounter Date	Notify Staff, Generate Claim	Missing Service From Date
	Diagnosis Count	Diagnosis Count	Ignore, Generate Claim 👻	Not Sufficient Diagnoses
	Minimum Diagnoses Per Service	2	Notify Staff, Do Not Generate Claim 🗸	Missing Diagnosis Count
	Apply Billing Rules	(Apply Billing Rules	Ignore, Generate Claim 🔹	Missing applying billing rule
	Billing Rules	CPT4:92507(Telehealth Mod 95) Edit	Ignore, Generate Claim 🗸	Missing HCFA Billing Rules
	Compare Provider PIN# And Supervisor NPI	(Y)	Ignore, Generate Claim 👻	Missing Comparision of NP
	Compare Renderring Provider NPI(24J) And Provider PIN#		Ignore, Generate Claim 🗸	Missing Comparision of NP
	Compare Renderring Provider NPI(24J) And Billing Provider NPI(33a)		Ignore, Generate Claim 👻	Missing Comparision of NP
	Rendering Physician Taxonomy	(Rendering Physician Taxonomy	Notify Staff, Generate Claim	Missing Rendering Physicia
ER CHECKS	Does it have non billable services?	Check Non Billable Services	Notify Staff, Generate Claim	Encounter has non billable
ER CHECKS	Is Service Location a Billing Location	(ser)	Ignore, Generate Claim 👻	Invalid Billing Facility
Code	CLIA Code	(Facility Domain Identifier	Ignore, Generate Claim 🗸	Missing CLIA Code
ervisor UPIN	Supervisor UPIN	(Supervisor UPIN	Ignore, Generate Claim 🗸	Missing Supervisor Provide
ervisor NPI	Supervisor NPI	(Supervisor NPI	Ignore, Generate Claim 🗸	Missing Supervisor Provide
ervisor MiddleInitial	Supervisor Middle Initial Name	Supervisor Middle Initial	Ignore, Generate Claim 🗸	Missing Supervisor Provide
ervisor FName	Supervisor First Name	(Supervisor First Name	Ignore, Generate Claim 🗸	Missing Supervisor Provide
ervisor LName	Supervisor Last Name	(Supervisor Last Name	Ignore, Generate Claim 🗸	Missing Supervisor Provide
er er er	visor LName visor FName visor Middlohital visor UPIN 20de R CHECKS R CHECKS	visor LName Supervisor Last Name visor Name Supervisor First Name visor MiddleInitial Supervisor Middle Initial Name visor MiddleInitial Supervisor Middle Initial Name visor NPI Supervisor VIPI N Supervisor UPIN Supervisor UPIN Code CLIA Code R CHECKS Does it have non billable services? R Compare Rendering Provider NPI(24.1) And Billing Provider NPI(33a) Compare Rendering Provider NPI(24.1) And Provider PIN# Compare Rendering Provider NPI(24.1) And Provider PIN# Compare Rendering Provider NPI(24.1) And Provider NPI(35a) Compare Rendering Provider NPI(24.1) And Provider NPI Billing Rules Minimum Diagnoses Per Service Diagnosis Count	Visor LName Supervisor Last Name Supervisor Last Name Visor Name Supervisor First Name Supervisor First Name Visor Middle Initial Supervisor Middle Initial Visor MiddleInitial Supervisor Middle Initial Supervisor VIPI Supervisor VIPI Supervisor UPIN Supervisor UPIN Code CLIA Code CLIA Code Facility Domain Identifier Code CLIA Code Rendering Physician Taxonomy Rendering Physician Taxonomy Compare Rendering Provider NPI(24J) And Billing Provider NPI(33a) Compare Rendering Provider NPI(24J) And Provider PIN4 Compare Rendering Provider NPI(24J) And Provider PIN4 CPT4:92507(Telehealth Mod 95) Eat Eat Eat Apply Billing Rules Apply Billing Rules Apply Billing Rules Minimum Diagnoses Per Service 2 Diagnosis Count Diagnosis Count	Visor ILast Supervisor Last Name Supervisor Last Name Supervisor Last Name Supervisor Supervisor First Name Supervisor First Name Supervisor First Name Supervisor First Name Supervisor Middle Initial Visor NMam Supervisor Middle Initial Name Supervisor Middle Initial Supervisor Middle Initial Visor NMame Supervisor Middle Initial Visor NMame Supervisor Middle Initial Visor NPI Supervisor NPI Supervisor NPI Supervisor NPI Supervisor NPI Supervisor UPIN Su



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 Si	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			1		
HOME CLIP	NICAL FORMS	VISITS	REPORTS	CCDA LOG	INBOX	BILLING		DOCUMENTS		
Encounter	Form Name	e		Form Cre	ated By	Form	Created On	Client Signat	ture	
100181285	<u>14-Day Tre</u>	atment Pl	an	Admin, E	nsoftek	01/1	I/2024 11:02 PM	Patient	~	
	(1.1)									
Treatment Plan	(ld)		C	created By The	re is no Trea	Create atment plans		Client Signature		
Treatment Plan Encounter	(ld) Consen	ıt Form	C			atment plan			Signature	
		ıt Form	(Ther Form Create		atment plan:	s to e-Sign Form Created On			
	Consen		C	Ther Form Create	d By	atment plan:	s to e-Sign Form Created On			