

# DrCloudEHR™ January 2024 Release Notes

Release to Staging Site – January 1, 2024 Release to Production Site – January 7, 2024

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### **Overview**

This document contains the Release Notes for January 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





Dependent on the activation of other feature(s)





Some setup is required after the release

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 <a href="mailto:support@drcloudemr.com">support@drcloudemr.com</a>.



### Patients

### Updates to prescription status in DrCloudEHR

### Core 🏚 Setup

DrCloudEHR now shows the "Canceled" status for all prescriptions canceled in DrFirst and closing the window.

Insu Adn		der(s) Yellow B		art   <u>New Encour</u> in, Ensoftek )	nter	12/06/2023 Individual P PP Yellow B No Appoint	ricks		E*							*	Save Nat
		C Tin	nesheet	🖭 InTake	🛱 Sc	nedule	<b>2</b> Patients	C Pract	ice 🚯 Billing	C Reports	🕸 Administration	🖄 Inbox <sup>61</sup>	\$\$\$ Settings	🔊 AC	DL 🙆	Unplug:Server	
	+		escriptions	5	Lis									_			
		Typ The	List			Print (PDF	) Print	(HTML)	Print (Fax)	Print Four Pa	nel					Check	All   Clear
	Ì		RX/Disper	nse		Drug		Created		Dosage				Qty.	Unit	Provider	Actio
		/ital	ePrescrip	tion		digoxin ta SB-26362			023 8:28 AM 023 8:28 AM	Take 1 mg via j	-tube three times a day	as needed for	pain	3	250 mcg	Admin, Ensoftek	<b>6</b> Q
	+	No				SB-	e (Lasix) tabl 248 <mark>1 Cancell</mark>	12/06/2	023 6:55 AM 023 6:57 AM	Take 2 mg via	g-tube as directed			24	40 mg	Admin, Ensoftek	<del>6</del> 9
sion Note	+	Mar				lurasidone tablet SB- 26362463	e (Latuda) 20. <mark>1 Cancell</mark>	12/06/2	023 6:09 AM 023 6:28 AM		nce a day as needed fo e as prescribed and re			12	40 mg	Admin, Ensoftek	<b>G</b> Q
horization for and	Т	his p															

### Facilities drop-down list based on selected "Categories"

#### Core 🏚 Setup

DrCloudEHR will now refresh the Service Facility drop-down list with the list of facilities that are assigned to the selected Category.

	付 Timesheet  😰 InTake 🗎 Schedu	e 2 Patients Practice	🚯 Billing 🕒 Reports 🐯 Administrati	on 😢 Inbo <sup>161</sup> 해 Settings 용 ADL 🐼 Unplug:Server					
Search Menu 🗶 🖛	New Encounter Form								
ABA Tool +	Save Benefits								
Chart +	Insurance:(P):AETNA-Do Not Use (from 10/01/20	23 until present)							
Administer Medications	Service Note:	Not Billable	Bill-TO. (Insurance +)	Diagnosis/Allergies FS: Functional Status ()					
Clients Facesheet		Category:	Select One   Show Only My Service Types	P: ICD10:A01.00(Typhoid fever, unspecified) (ICD10 P: ICD10:F10.10(Alcohol abuse, uncomplicate (ICD1					
		Service Facility:*	Save Nature Clinic 🔹						
I Care Plan		Program:	Select Program *	P: ICD10:Z63.1(Problems in relationship wit (ICD10:					
l Care Plan Report		Event Address: Select Address	123, Down Street Reseda, CA - 32111	P: ICD10:F33.0(Major depressive disorder, r (ICD10:					
Interdisciplinary	Check-Out Date:	Place Of Service:	11: Office •						
Treatment Plan	After Visit Instructions:	Billing Program:*	Save Nature Clinic +						
Prescribe		Sensitivity:	Normal						
Call Log Manager		Referring Provider: Referring NPI:	User, Good 👻						
Show Incomplete		From Date of Service: ( mm/dd/yyyy hh:mm AM/PM	) 12/13/2023	Add					

Note: These changes are only applied at the New Encounter page and not in Schedule-Appointments.



### Ability to select Default "Provider" at Encounter/Admit Page

### Core 🎝 Setup

DrCloudEHR now includes a new Global setting "Default referring provider at Admit and Encounter pages". Once a provider is configured in the Global settings, that provider will be selected *by default* at Admit & New Encounter pages and for encounters during check-in.

Save Insects (1003277) Check Room Availability								
New Admission								
Enter New Admission details and the	hen click on submit.							
Admit Date:	Facility:	Program:	Legal Status:					
12/14/2023 07 : 04	PM () Select V	Select Program 🗸	○ Legal ○ Non-Legal					
	Comments:	der End Date:						
Unassigned 🗸	···· ·· · · · · · · · · · · · · · · ·	: 0						
Type Of Care: Inpatient Part A	Referring Provider:         Referring NPI:           Kate, Rose         921029292							
Admission Type: Urgent	Non boolth care facility pairs	n Diagnosis: elect a Diagnosis 🗸 Add	Common Medications:					

### Enhancements to the Custom Search features

### Core 🎝 Setup

DrCloudEHR now includes the following enhancements to the custom searches by adding the below options (Radio buttons).

**Use Wildcards:** Use wildcards (e.g., \*) to find parts of a term anywhere in your text. <u>Example:</u> Searching "ian" matches "ian", "Lillian", "Brian".

**Find Whole Words Only:** Look for exact matches of the term as complete words. <u>Example:</u> Searching "John" only matches the standalone name "John," not "Johnson" or "Johnathan."

**Match Prefix:** Find the term only at the start of words for targeted results. Example: Searching "Dav" matches "David" but not "Davis" or "Graves."

Search:	John			Submit Cancel				
	Use Wildcards	$^{\bigcirc}$ Find whole words only $^{\bigcirc}$	O Match prefix					
Select Fields:	Check All	Uncheck All						
Name		First		Last				
Suffix		Alias Name		External ID				
Previous Na	ame	DOB		Gender				
🗆 S.S.		UCI #		□ VA				
MRN #		Client Status		Client Closed Date				
Lived Name	e	Pronoun Name		Court ordered firearm or weapon restriction				
🗆 If yes, ente	r restriction date	Demographic Aler	t	Communication Notes				
Notes		test		my test				
🗆 radioo		Marriage Status		Preffered Name				
School		🗆 Email		If Other, please indicate				
Client Infor	mation	Address		□ Address2				
□ City		State		Zip Code				
Country		🗆 Birth Name (if diff	erent)	Birthplace				
Home #		□ Work #		Mobile #				

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### Practice

### Backdating the effective dates for primary diagnosis and primary insurance now applies to all encounters created from the effective date

#### Core 🗱 Setup

DrCloudEHR now includes the "Show only encounters not justified with primary Dx" checkbox at Batch Closing/Reopen encounters. With the above checkbox checked, the system will show all encounters with no Primary Diagnosis Dx codes.

Batch Closing/Reopening Encounters										
Advanced Search Search with Encounter Number										
Patient:	Rendering Provider:	<ul> <li>Include Inactive users</li> </ul>								
From Date: 11/29/2023 To Date: 11/29/2023	Insurance:	¥	Search Offline Reports Mark as Cleared							
Facility: Select •	Encounter Category:	¥	Close Encounters Reset Encounters Update Contract Amount							
Billing Billable 🗸	Billed Status: All	•	Replace & Justify with Primary Dx Append & Justify with Primary Dx							
Service Clear	Service Code Type: All		CSV Export							
Show Only Re-Opened Encounters			'							
Show only encounters with '0' contract rates										
Show only encounters not justified with primary Dx										
Note: We should not reset encounters that are already billed.										

Staff can now use the newly added "Replace & Justify with Primary Dx" and "Append & Justify with Primary Dx" buttons for the below actions.

**<u>Replace & Justify with Primary Dx:</u>** First, all existing diagnosis codes are removed from selected encounters, then all service codes in the fee sheet are justified with the Primary Diagnosis code.

<u>Append & Justify with Primary Dx</u>: First, the Primary Diagnosis code is added to the fee sheet and all services codes for the selected encounters are justified with all the codes in the fee sheet.

### Ability to override rules for batch closing encounters

#### Core 🌼 Setup

DrCloudEHR now includes the new ACL "Allow access to all encounters at Batch Closing Encounters". If this new ACL is enabled, then at the Batch Closing/Reopening Encounters page, all the encounters checkboxes will be enabled so staff can close batch encounters.

Batch C	latch Closing/Reopening Encounters														
Ad	lvance	ed Search Sea	rch with Encounter	Number											
Pa	tient: [			]	Rende	ering Provider:		¥	Include Inactive users		Search		ne Reports		
	From Date: (	11/27/2023	To Date: 11/30/2023	Cle	ar	Insurance:		٣			k as Cleare		et Encounters		
Fa	cility:	Select	¥		Encou	unter Category:		Ŧ			late Contrad	t Amount			
	killing /pes: (	Billable 🗸			Billed	Status: All	▪ Status	: Open 👻			lace & Justi				
	rvice code:		Clear		Servi	ce Code Type: 🚺	- III								
		Show Only Re-Opened	d Encounters							App	end & Justi	ly with Prir	mary Dx		
		Show only encounters	with '0' contract rates							C	SV Export				
		Show only encounters	not justified with prim	ary Dx											
No	Note: We should not reset encounters that are already billed.														
	PID	Client Name	Encounter Category	Encounter	Encounter Date	Rendering Provider	Facility	Forms		Encounte Status	Billed/ Unbilled	Service Code Type	Service Code(s)	Contract Amount Insurance	,
	10026	29 Save Birds	Anger Expression	100179944	11/28/2023 11:46 PM	Doctor, Super	Save Nature Clinic	Case Manager Note	ment	Open	Unbilled	CPT4	97116	S: CIGNA	



### Administration-Lists

### Enhanced search features at Administration-Lists

Core 🏚 Setup

Users can search for any word at the Administration-Lists and the system will pull up all the lists matching the search criteria.

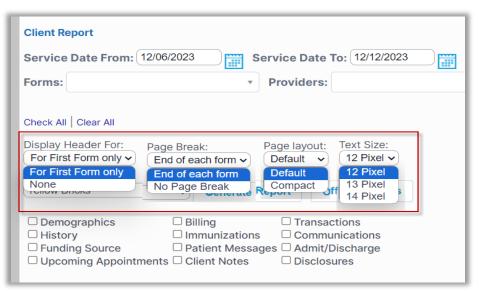
	C Timesheet 🗈 I	inTake 🛱 Schedu	le 🙎 Patients	D Practice	Billing	C Reports	8 Administration
Search Menu 🗶 💽	List Editor						1
Administration	Lists represent a set of options,	/choices that are applied	later in one or more pla	ces in the DrCLoud	EHR software.		
Home	Lists						
	Language (47)	*					
System Workflow	file						
Global Settings	Claim File Extensions (2)						
	ERA File Extensions (3)						
Users	MU3 IMMUN PROFILE IDE	NTIFIER (8)					
Exclusions	Save						
Layouts							
	ID	Title	Ord	er Default	Notes		Active
Navigation Layout	armenian	Armenian	10				
Liete							

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### **New Printing Options**

The Patient Report now offers new options when printing forms.

#### Core 🗱 Setup



#### **Display Header for:**

For First Form only: Facility address will be included in the first form only.

**None:** No Facility info will be included on any page.

#### Page Break:

End of each form: Displays each form on the new page.

No Page Break: No page break between forms.

#### Page Layout:

**Default:** Data will print with a regular space between the fields.

**Compact:** Data will print with less space between the fields.

Text Size: The text can be set to 12 Pixel / 13 Pixel / 14 Pixel.