



DrCloudEHR™ January Release Notes

Release to Staging Site – January 08, 2023

Release to Production Site – January 15, 2023

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Overview

This document contains the Release Notes for January 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



Dependent on the activation of other feature(s)



Some setup is required after release



Requires purchase and additional setup

Please note that 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 support@drcloudemr.com.

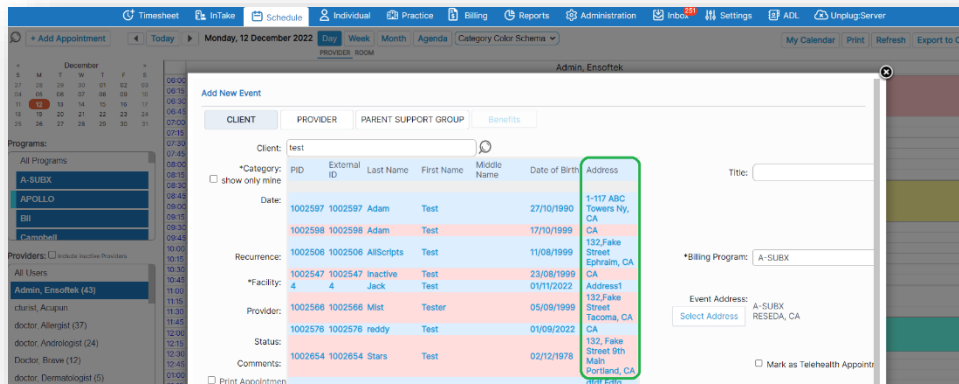
Schedule

Display Client Address in Scheduling Tool

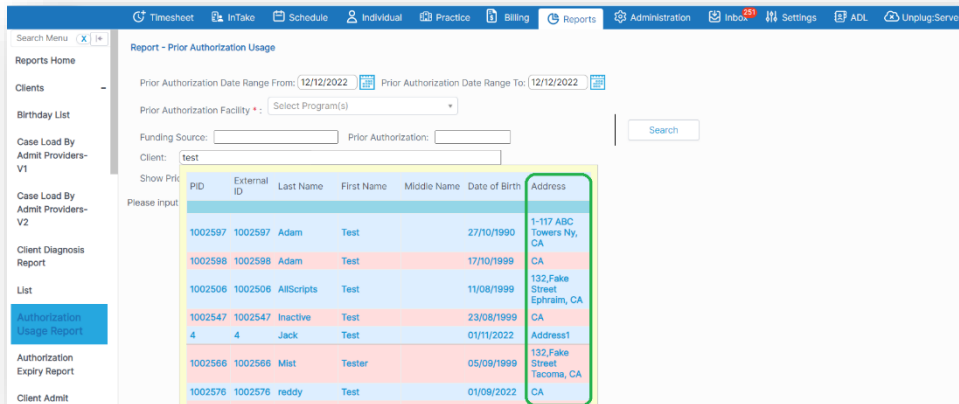


The **patient address** is now included in the patient search results throughout the application. The patient address is displayed along with PID, External ID, Patient Last Name, First Name, Middle Name, and DOB at Results.

At Schedule:



At Reports:



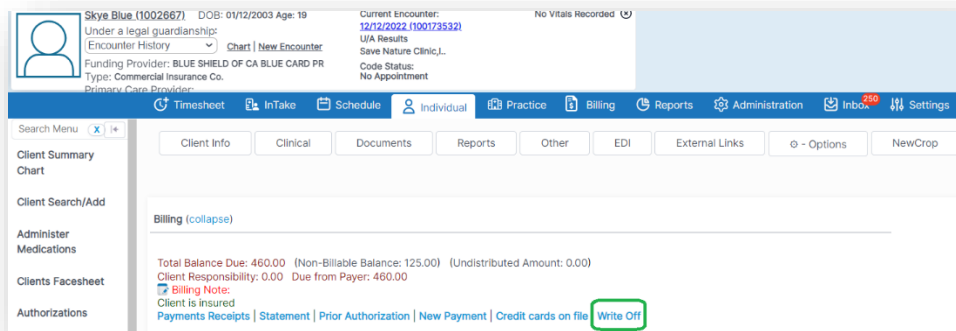
Patients

Write off entire client account balance

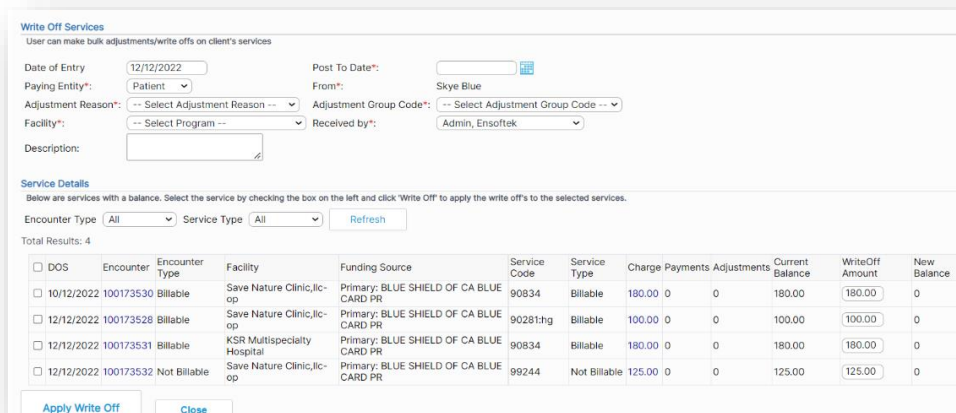
Core Setup

A link, '**Write Off**' is provided in the Billing section of the Client Summary Chart to write off selected balances.

Clicking on the 'Write Off' link opens the '**Write Off Services**' page, where a list of Encounters, with their service information, is displayed. The Encounter list includes only the Encounters that have a balance.



You can pick the **Adjustment Reason** and the **Adjustment Group Code** to apply to the Encounters being written off.

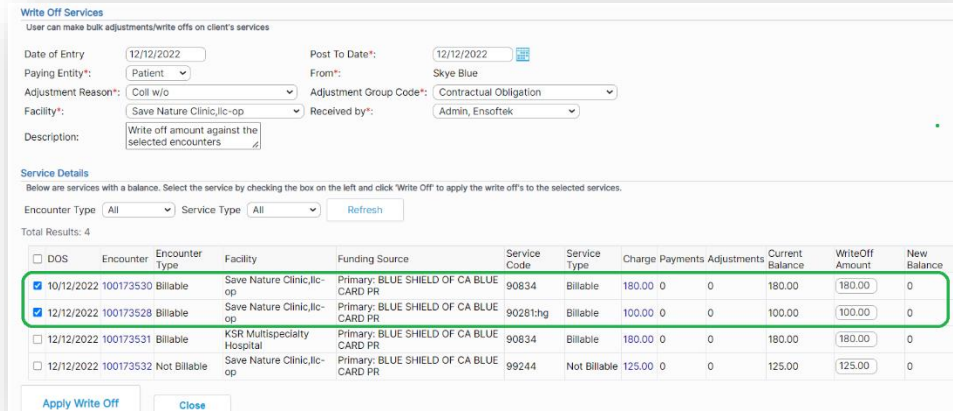


The '**Encounter**' and the '**Charges**' columns contain links to the **Fee Sheet** and the Invoice page, respectively, for that Encounter.

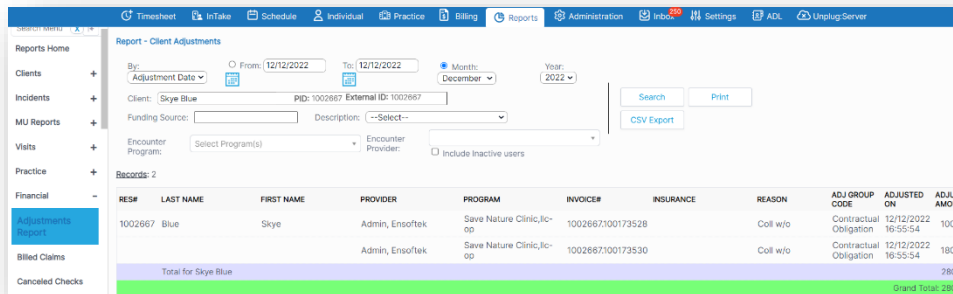
Navigating to the **Fee sheet** will also enable the user to update the **Fee Sheet** and submit a new or corrected claim to the payer if required. In this case, you may choose not to include this service to be written off.

Encounter type and **Service type** filters will further help narrowing down the results that were written-off.

Each row is presented with a checkbox. You can select the Encounters that are candidates to apply for the write-off and click on the **'Apply Write Off'** button. This action will apply the write-off adjustment to the selected services with the chosen Adjustment Reason.



Write-off records will be displayed in **Reports** → **Financial** → **Adjustment report**.



Controlling Telehealth visit options for Client Location

Core

A new global flag labeled **'Control Telehealth Options at Close Encounter page'** was introduced. This global flag has three options:

- Do not show the telehealth checkbox or visit options/client location at Encounter close in any case.
- Only show the telehealth checkbox and visit options/client location at Encounter close when the Encounter is marked as Telehealth.
- Show the telehealth checkbox and visit options/client location at Encounter close in all cases".

When **'Do not show the telehealth checkbox or visit options/client location at Encounter close in any case'** is selected at the Global Settings, the system will not display the Telehealth Visit options and client location at the Closing Summary.

When **'Only show the telehealth checkbox and visit options/client location at Encounter close when the Encounter is marked as telehealth'** is selected at the Global settings, the system will display the Telehealth Visit options and client location at Closing Summary if the Encounter is marked as Telehealth.

When 'Show the telehealth checkbox and visit options/client location at Encounter close in all cases' is selected at the Global Settings, the system will display the Telehealth Visit options and client location at Closing Summary if the Encounter is marked as Telehealth or Non-telehealth.

Closing Summary
Check that all services and justifying diagnosis are correct before closing encounter

Services Performed
Services in this list will be available for billing. For each service choose ALL diagnosis pointers that apply.

Units	Service Code	Modifier	Diagnosis Pointer with Precedence
1	H2021 Community Based Wraparound Service	<input type="text"/>	<input type="text"/>

Telehealth: Telehealth Visit Options: Client Location:

Will be displayed based on the option selected in the Global

Adding filter for Providers



At Patients → Patient Summary Chart → Reports → Patient Report, we added a 'Providers' filter.

Client Report

Service Date From: Service Date To:

Forms: Providers:

Practice

Add parameters used to create Billing Rules as search filters



At Practice → Administrative → Billing Rules All parameters used for creating Billing rules to the search criteria for finding the Billing Rules.

Search Criteria:

Services: Rule Name:

Select Service:

Funding Source Type: Funding Source: Next Funding Source Type: Next Funding Source: Facility: Category:

Select Insurance Type: Select Funding Source: Select Next Insurance Type: Select Next Insurance: Select Program: Select Encounter Type:

Place Of Service: Age Range (In Years): Certification/Education: Service Time Range (In mins): Encounter Billable: Telehealth Encounter:

Select Place Of Service: From Age: To Age: Select Certification/Education: From Time: To Time: Select Encounter Billable Type: Select Telehealth Encounter:

Level Of Care: Telehealth Visit Options: Client Location:

Select Level Of Care: Any: Any:

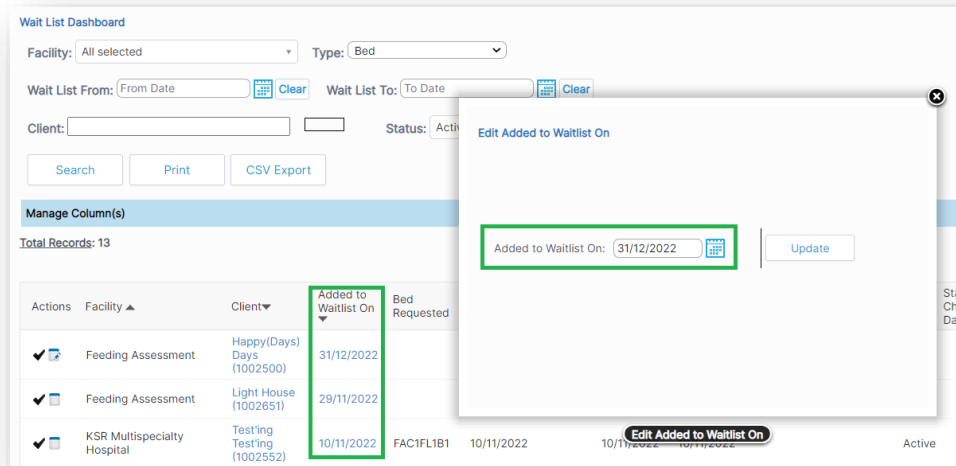
Billing Codes: Date Range:

Select Codes: From: To:

Editing 'Added to Waitlist on' column

Core

At Practice → Waitlist Dashboard, a link against the dates under the 'Added to Waitlist On' column was provided for the Bed Type waitlist records. Clicking on it will display a popup window for the user to change the 'Added to waitlist on' date.

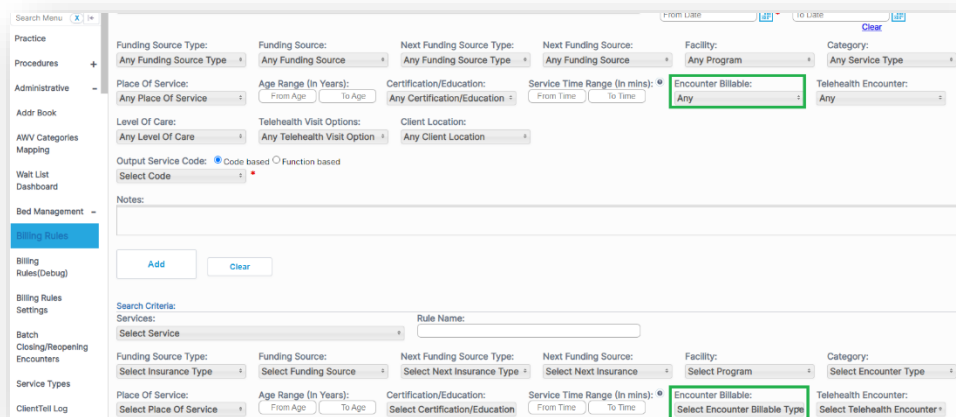


Adding Encounter type as Billing Rules parameter

Core

At Practice → Administrative → Billing Rules, added 'Encounter Billable' as additional parameters to the Billing rules to create and search for the Billing Rules.

The Options available are 'Any', 'Yes', and 'No'.



Billing

Linking the Claims Manager to the Patient Chart

✔ Core

Claims Manager → Patient Name column; Implemented hyperlink to the patient’s name, so clicking on their name will navigate to the Patient Summary page.

<input type="checkbox"/>	D-1002605-20221206221302	Submitted	2022-12-06 22:13:02	DFT	2022-10-20	2022-10-20	Nature, Save (1002605)	Mouse Over Here	100.00	CIGNA
<input type="checkbox"/>	P-1002632-1001685202(TEST)	Submitted	2022-12-06 21:46:01	HCFA	2022-12-01	2022-12-01	Day, Good (1002632)	Mouse Over Here	539.00	ANTHEM BLUE CROSS OF CA
<input type="checkbox"/>	I-1002632-1001686202(TEST)	Printed	2022-12-06 21:46:04	UB-04	2022-12-01	2022-12-01	Jones, Adam (1002632)	Mouse Over Here	405.00	ANTHEM BLUE CROSS OF CA
<input type="checkbox"/>	P-1002659-1001687202(TEST)	Accepted	2022-12-12 11:57:12	HCFA	2022-12-12	2022-12-12	MERGE, MAIL (1002659)	Mouse Over Here	180.00	HEALTH NET

Viewing patient Encounters only in Collections within Statement Manager

✔ Core

The Options for the Collection Status are 'All,' 'Patients in collections,' and 'Patient not in collections.'

This same filter is also introduced at **Patient Demographics → Billing → Statement**

Statement [Print](#) [PDF Download Selected Statements](#) [Email Patient Statements](#)

Facility Address: Primary Biz. Facility Print Follow-up Reason

Svc Date: To:

Encounter status: All Only encounters with balance due [Search](#)

Collection Status: All Patients in collection Patients not in collection

<input type="checkbox"/>	Client	Invoice	Svc Date	Last Stmt	In Detail	Adjust	Insurance Paid	Patient Paid	Balance
<input type="checkbox"/>	1002629	1002629.100173249	11/23/2022			0.00	0.00	3,300.00	0.00
<input checked="" type="checkbox"/>	IC 1002629	1002629.100173073	11/06/2022	12/06/2022	Details not available	3,300.00	0.00	100.00	3,200.00
Total:						6,600.00	0.00	3,400.00	3,200.00

Adding fields to Client Invoice page

✔ Core

Requested fields Post to Date and Date of Entry are added at EOB → Invoice page by introducing a Global flag 'Show Post to Date and Date of Entry' fields at Invoice page.' Additionally, the 'Date' field was renamed to 'Deposit Date.'

Balance	By/Source	Done With	Deposit Date	Post to Date	Date of Entry	Pay	Adjust
0	Pt/		2022-12-19	12/19/2022	12/19/2022		25.00
	Pt/		2022-12-19	12/19/2022	12/19/2022	100.00	
3122.00	Patient	None					

[Save](#)

Adding 'Deposit Date' as an option

✔ Core

The existing option of 'Adjustment Date' was renamed to 'Date of Entry' in the dropdown, and the data column header for Adjustment date.

We have implemented the changes in the Adjustment Report and added the 'Deposit date' filter option. We renamed the adjustment date filter option to the 'Date of entry' and the 'Adjusted date' column to the 'Date of Entry' in the report.

Report - Individual Adjustments

By: **Deposit Date** From: 12/06/2022 To: 12/06/2022 Month: January Year: 2022

Inc: [ID(HRN)]

Ins: **Deposit Date** Description: --Select--

Encounter Facility: [Select Facility(s)] Encounter Provider: [] Include inactive users

Records: 2

RES#	LAST NAME	FIRST NAME	PROVIDER	PROGRAM	INVOICE#	INSURANCE	REASON	ADJ GROUP CODE	DATE OF ENTRY	ADJUST AMOUNT
1004698	Peetz	Oaklee	Keltner, Paul	P-IMMS	1004698.100168898	Self Pay 0% Fees	Charges exceed your contracted/legislated fee arrangement		12/06/2022 02:10:30	21.96
			Keltner, Paul	P-IMMS	1004698.100168898	Self Pay 0% Fees	Charges exceed your contracted/legislated fee arrangement		12/06/2022 02:10:30	21.96

Make Adjustment Code reason filter searchable

Core

We implemented the changes in **Adjustment Report** → **Adjustment code reason** (Description) field to enter the text you want to search by.

RES#	LAST NAME	FIRST NAME	PR	REASON	ADJ GROUP CODE	DATE OF ENTRY	ADJ AMOUNT
1004698	Peetz	Oaklee	KE	45 - Charges exceed your contracted/legislated fee arrangement	Self Pay 0% Fees	12/06/2022 02:10:30	
		Keltner, Paul	P-IMMS	45 - Charges exceed your contracted/legislated fee arrangement	Self Pay 0% Fees	12/06/2022 02:10:30	

ChartMeds

Accessing ChartMeds in its own tab

Core

We can now set how often we want to sync the **ChartMeds data**.

ChartMeds access is now available in a new tab. The Background Service option can be set up with a specific time limit for **syncing ChartMeds Data**.

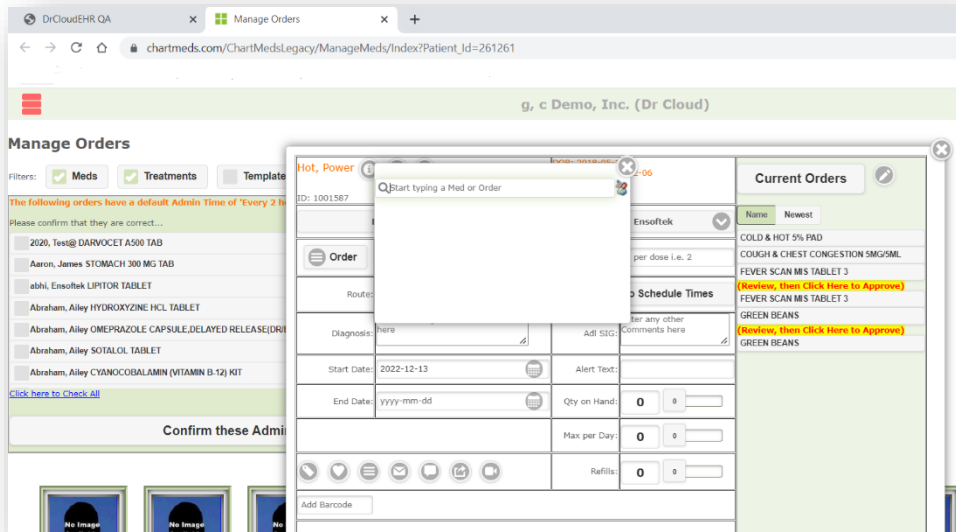
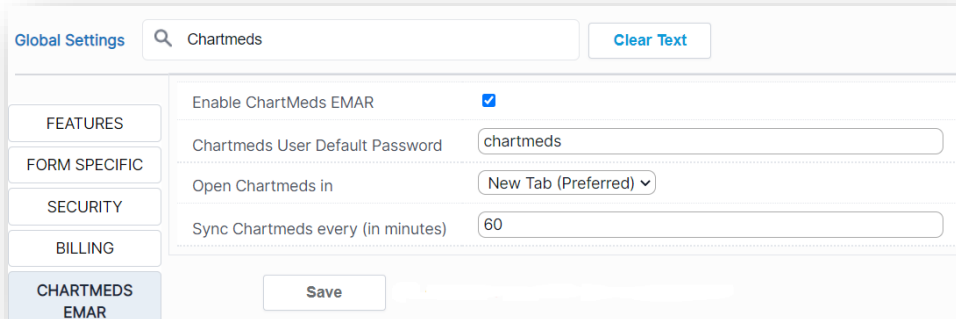
By default, the sync happens every **60 mins**.

Two new Global Settings were introduced for this.

- Open ChartMeds in (The iframe or New Tab (Preferred option)) dropdown. The default is 'New Tab'
- Sync ChartMeds every --- (minutes). The default is 60 minutes

Patient Demographics --> EMAR V2/ChartMeds

When we click on the 'Manage Order' button, ChartMeds is opened in a new tab to order the medication.



Left Navigation bar → EMAR - When we click on the Search button, it will open a new tab to order the medication.

