DrCloudEHR™
January Release Notes

Release to Staging Site – January 08, 2023

Release to Production Site – January 15, 2023

Table of Contents

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:

Core	**Add-on**
Available to all users when released	Dependent on the activation of other feature(s)
Setup	**Add-on**
Some setup is required after release	Requires purchase and additional setup

Please note, 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.

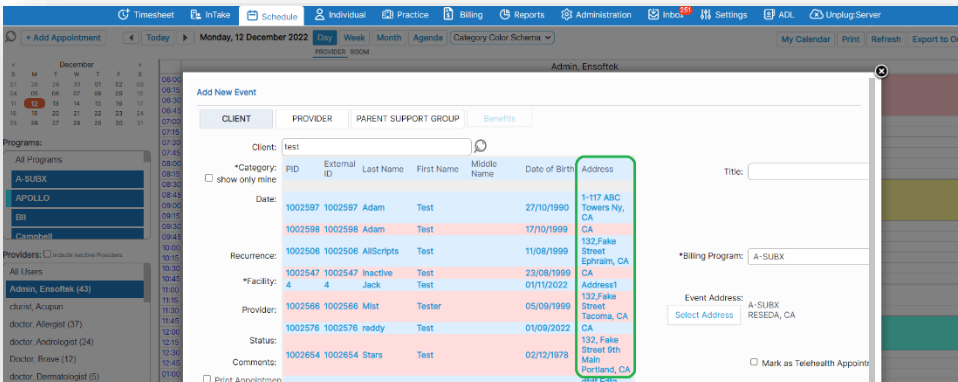
Schedule

Display Client Address in Scheduling Tool

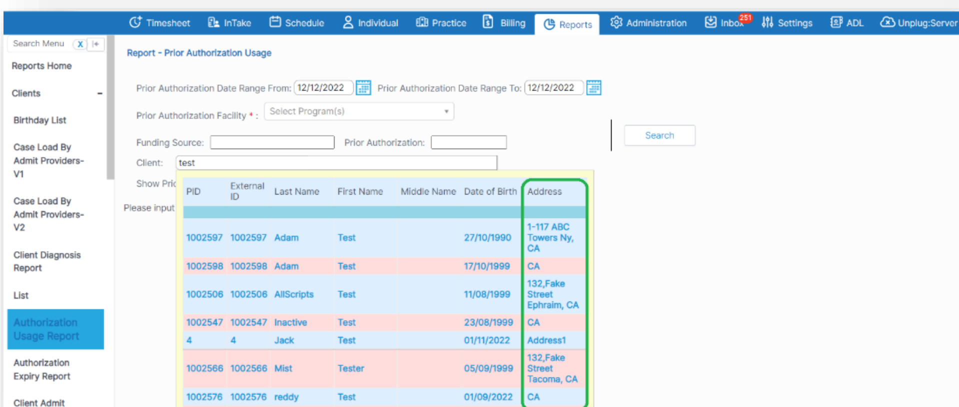
Core

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.

<u>At Schedule:</u>



<u>At Reports:</u>



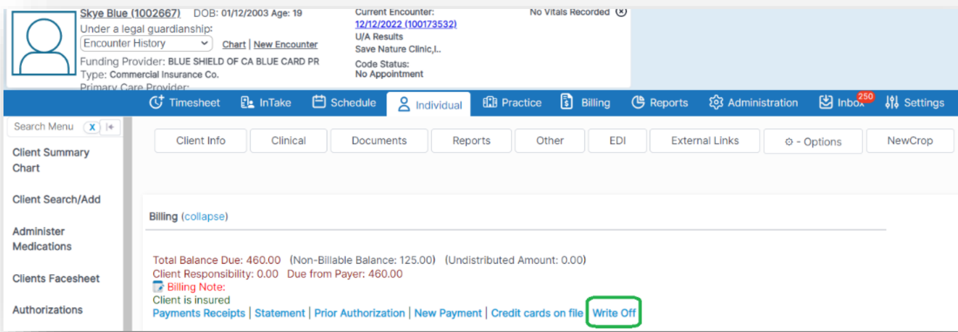
Patients

Write off entire client account balance

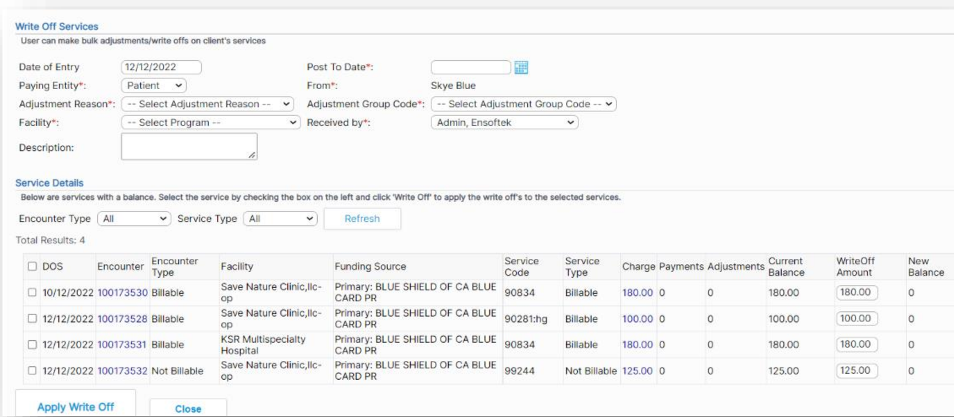
Core Setup

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.



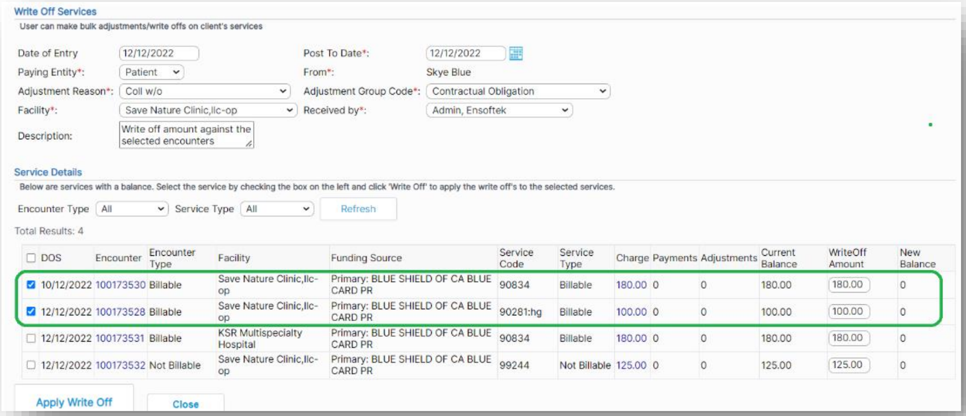
You can pick the **Adjustment Reason** and the **Adjustment Group Code** to apply to the Encounters being written off.



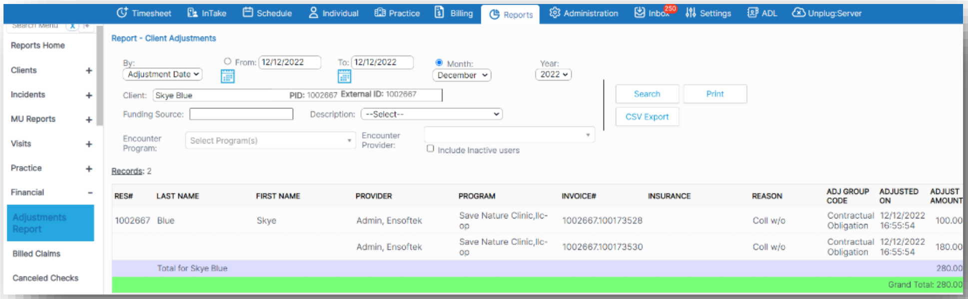
The **'Encounter'** and the **'Charges'** columns contain links to the **Fee Sheet** and the Invoice page, respectively, for that Encounter.

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 Setup

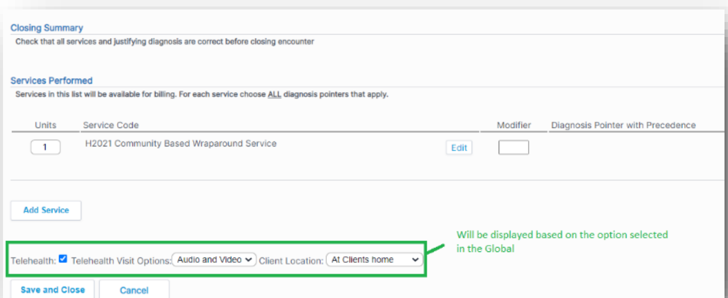
A new global flag labeled **'Control Telehealth Options at Close Encounter page'** was introduced. This global flag has three options:

- 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**.

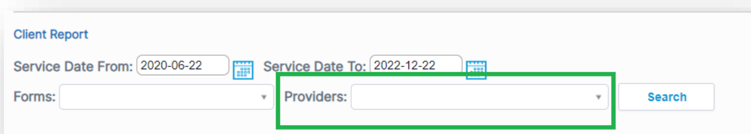
When **'Show the telehealth checkbox and visit options/client location at Encounter close in all cases'** is selected at the Global Settings, the system will display the Telehealth Visit options and client location at Closing Summary if the Encounter is marked as Telehealth or Non-telehealth.



Adding filter for Providers

Core

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

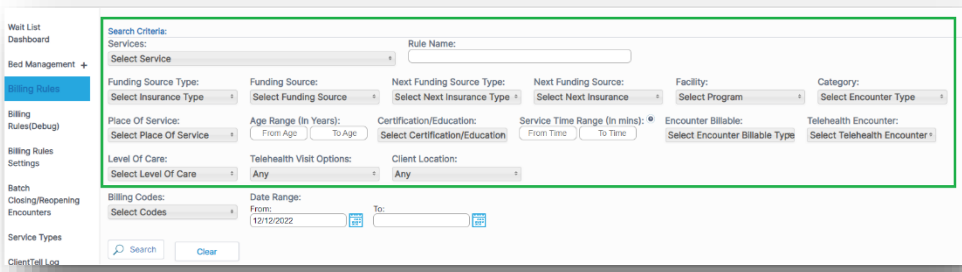


Practice

Add parameters used to create Billing Rules as search filters

Core

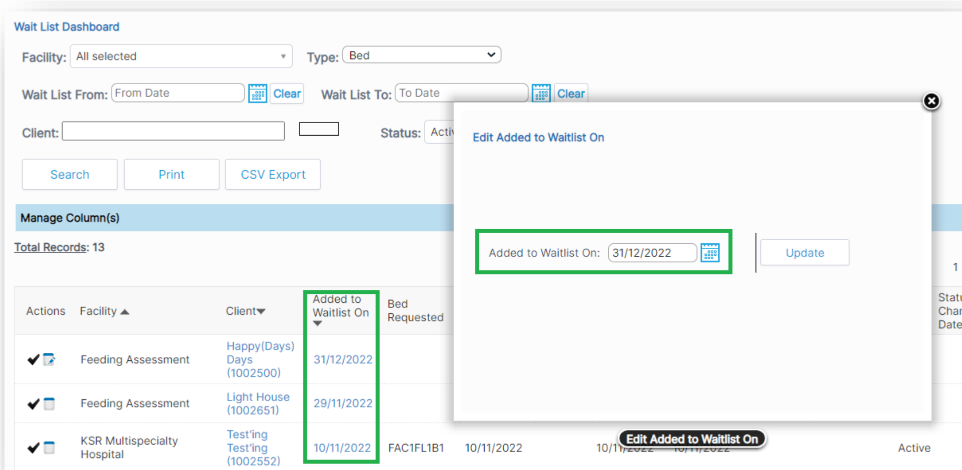
At **Practice → Administrative → Billing Rules** All parameters used for creating Billing rules to the search criteria for finding the Billing Rules.



Editing 'Added to Waitlist on' column

Core **Setup**

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.



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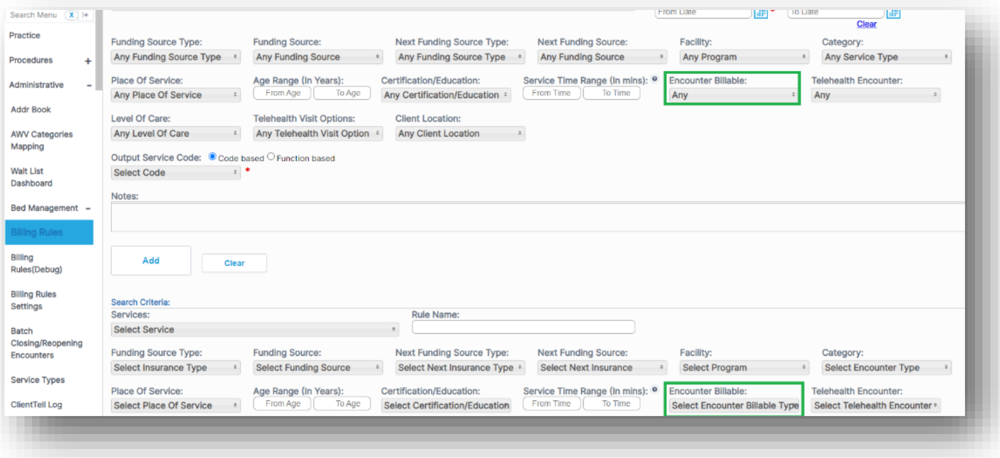
Adding Encounter type as Billing Rules parameter

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'.**

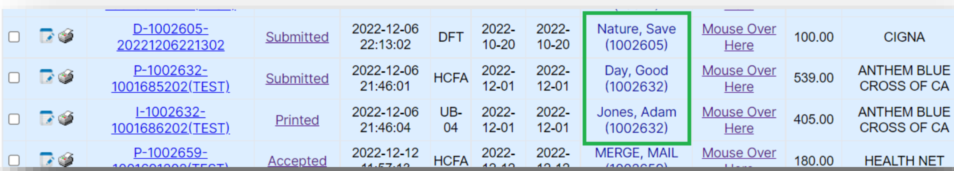


Billing

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.

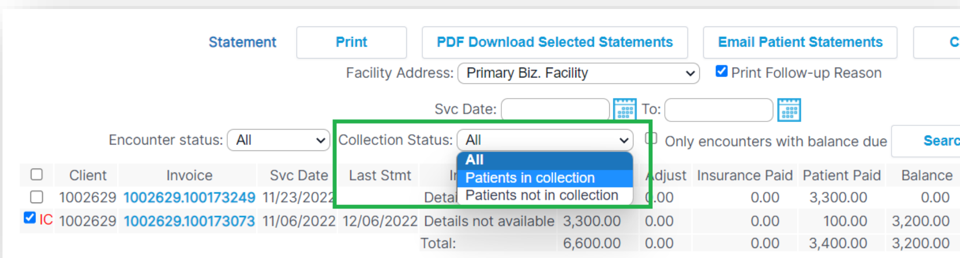


Viewing patient Encounters only in Collections within Statement Manager

Core

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

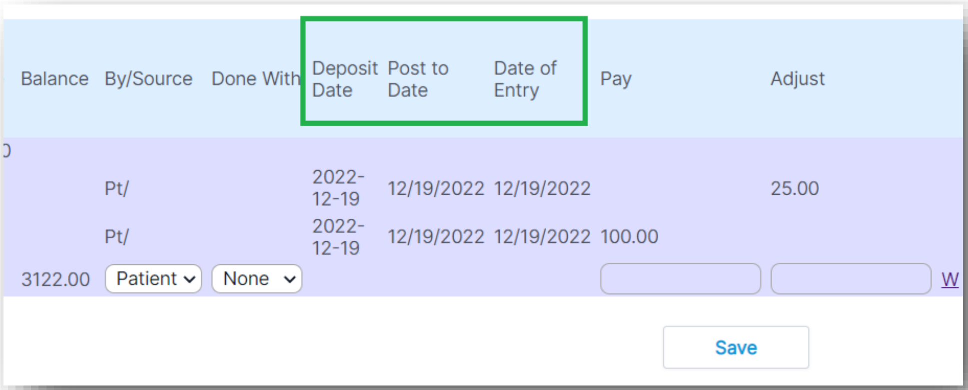
This same filter is also introduced at **Patient Demographics → Billing → Statement**



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.'

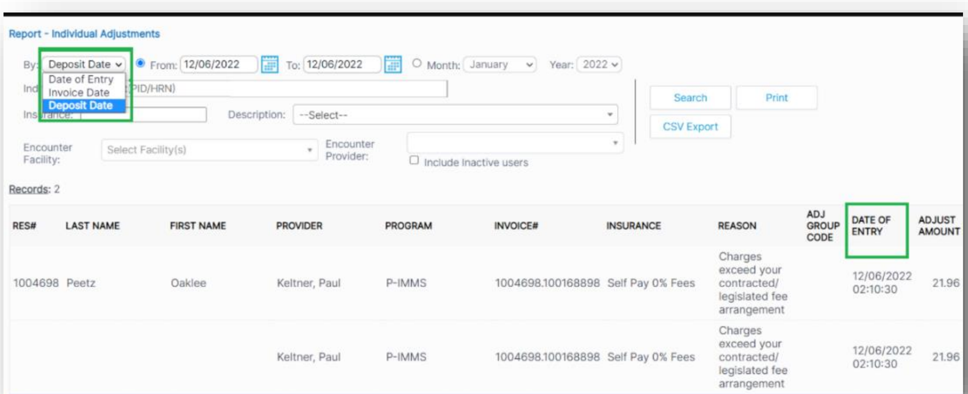


Adding ‘Deposit Date’ as an option

Core

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

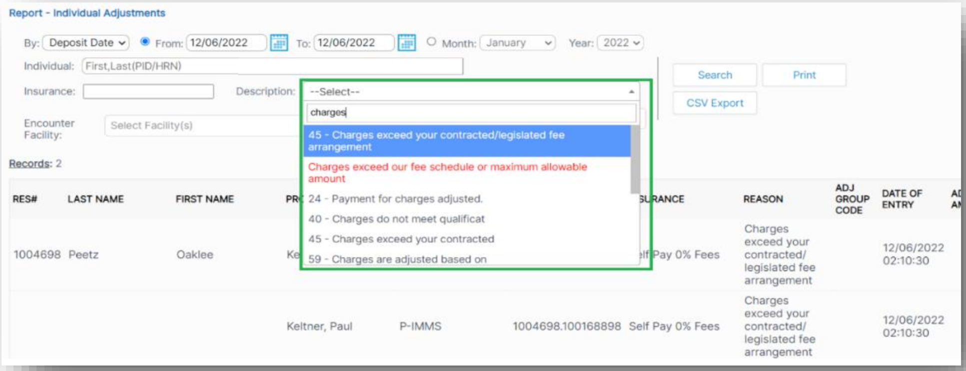
We have implemented the changes in the **Adjustment Report** and added the **'Deposit date'** filter option. We renamed the adjustment date filter option to the **'Date of entry'** and the **'Adjusted date'** column to the **'Date of Entry'** in the report.



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.



ChartMeds

Accessing ChartMeds in its own tab

Core **Setup** **Add-on**

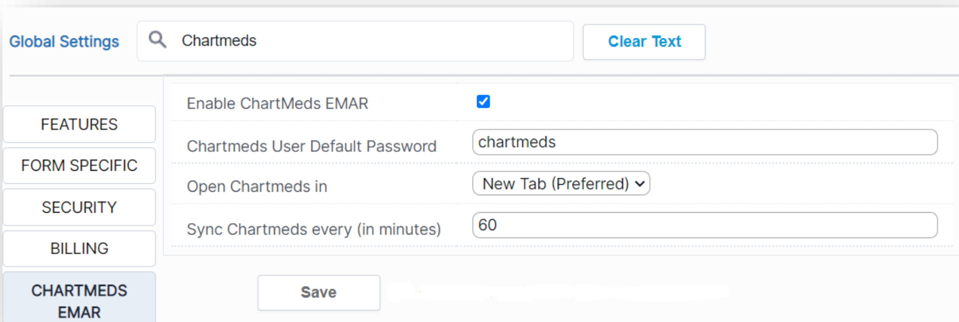
We can now set how often we want to sync the **ChartMeds data**.

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**.

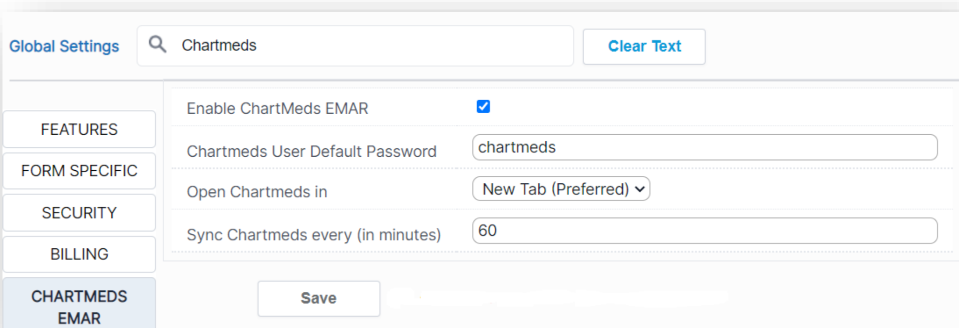
Two new Global Settings were introduced for this.

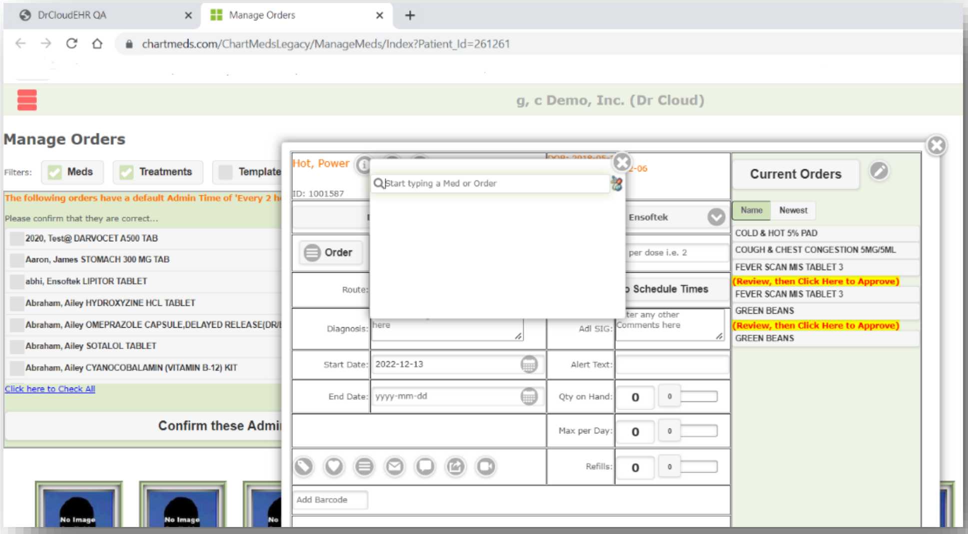
- Open ChartMeds in (The iframe or New Tab (Preferred option)) dropdown. The default is 'New Tab'
- Sync ChartMeds every --- (minutes). The default is 60 minutes



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.