



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, 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.

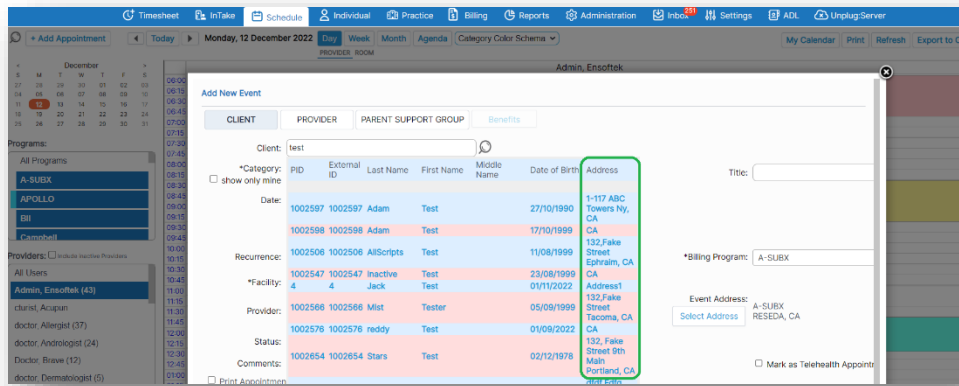
Schedule

Display Client Address in Scheduling Tool

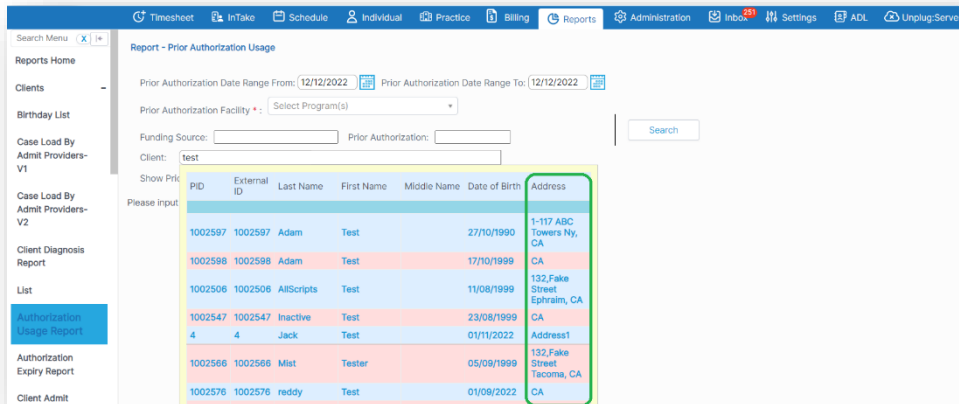


The **patient address** is now included in the patient search results throughout the application. The patient address is displayed along with **PID, External ID, Patient Last Name, First Name, Middle Name, and DOB** at Results.

At Schedule:



At Reports:



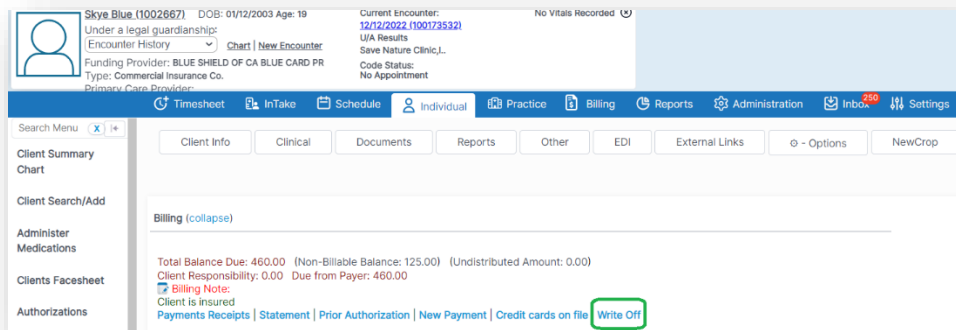
Patients

Write off entire client account balance

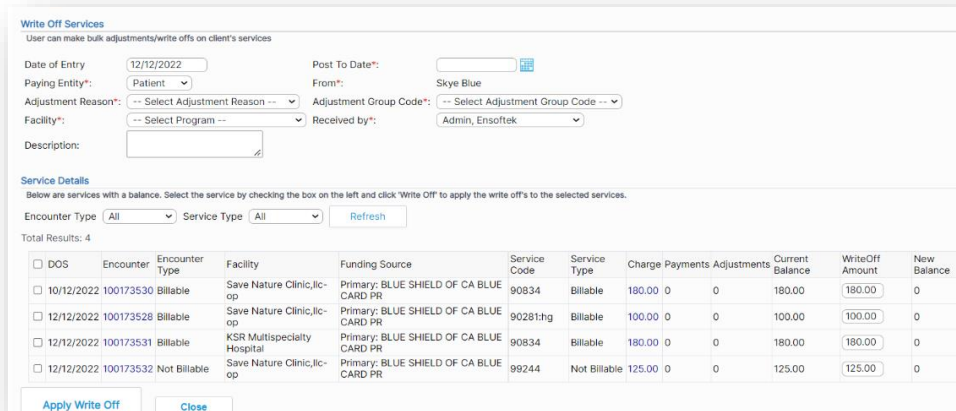
Core Setup

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 Services
User can make bulk adjustments/write offs on client's services

Date of Entry: 12/12/2022 Post To Date*: 12/12/2022
 Paying Entity*: Patient From*: Skye Blue
 Adjustment Reason*: Coll w/o Adjustment Group Code*: Contractual Obligation
 Facility*: Save Nature Clinic,Inc-op Received by*: Admin, Ensoftek
 Description: Write off amount against the selected encounters

Service Details
Below are services with a balance. Select the service by checking the box on the left and click 'Write Off' to apply the write off's to the selected services.

Encounter Type: All Service Type: All Refresh

Total Results: 4

| <input type="checkbox"/> | DOS | Encounter | Encounter Type | Facility | Funding Source | Service Code | Service Type | Charge | Payments | Adjustments | Current Balance | WriteOff Amount | New Balance |
|-------------------------------------|------------|-----------|----------------|-----------------------------|---|--------------|--------------|--------|----------|-------------|-----------------|-----------------|-------------|
| <input checked="" type="checkbox"/> | 10/12/2022 | 100173530 | Billable | Save Nature Clinic,Inc-op | Primary: BLUE SHIELD OF CA BLUE CARD PR | 90834 | Billable | 180.00 | 0 | 0 | 180.00 | 180.00 | 0 |
| <input checked="" type="checkbox"/> | 12/12/2022 | 100173528 | Billable | Save Nature Clinic,Inc-op | Primary: BLUE SHIELD OF CA BLUE CARD PR | 90261hng | Billable | 100.00 | 0 | 0 | 100.00 | 100.00 | 0 |
| <input type="checkbox"/> | 12/12/2022 | 100173531 | Billable | KSR Multispecialty Hospital | Primary: BLUE SHIELD OF CA BLUE CARD PR | 90834 | Billable | 180.00 | 0 | 0 | 180.00 | 180.00 | 0 |
| <input type="checkbox"/> | 12/12/2022 | 100173532 | Not Billable | Save Nature Clinic,Inc-op | Primary: BLUE SHIELD OF CA BLUE CARD PR | 99244 | Not Billable | 125.00 | 0 | 0 | 125.00 | 125.00 | 0 |

Apply Write Off Close

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

Reports - Client Adjustments

By: Adjustment Date From: 12/12/2022 To: 12/12/2022 Month: December Year: 2022

Client: Skye Blue PID: 1002867 External ID: 1002867

Funding Source: Description: --Select--

Encounter Program: Select Program(s) Encounter Provider: Include Inactive users

Records: 2

| RES# | LAST NAME | FIRST NAME | PROVIDER | PROGRAM | INVOICE# | INSURANCE | REASON | ADJ GROUP CODE | ADJUSTED ON | ADJUST AMOUNT |
|---------------------|-----------|------------|-----------------|---------------------------|------------------|-----------|----------|------------------------|---------------------|---------------------|
| 1002867 | Blue | Skye | Admin, Ensoftek | Save Nature Clinic,Inc-op | 1002867100173528 | | Coll w/o | Contractual Obligation | 12/12/2022 16:55:54 | 100.00 |
| | | | Admin, Ensoftek | Save Nature Clinic,Inc-op | 1002867100173530 | | Coll w/o | Contractual Obligation | 12/12/2022 16:55:54 | 180.00 |
| Total for Skye Blue | | | | | | | | | | 280.00 |
| | | | | | | | | | | Grand Total: 280.00 |

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.

The screenshot shows the 'Closing Summary' form. At the bottom, there is a section for 'Telehealth' with a checked checkbox. To its right is a dropdown menu for 'Telehealth Visit Options' set to 'Audio and Video', and another dropdown for 'Client Location' set to 'At Clients home'. A green box highlights these two dropdowns, with a callout arrow pointing to them and the text: 'Will be displayed based on the option selected in the Global'.

Adding filter for Providers

Core

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

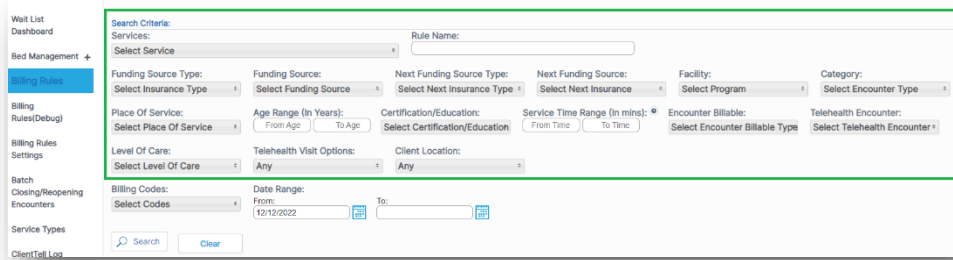
The screenshot shows the 'Client Report' form. It includes date pickers for 'Service Date From' (2020-06-22) and 'Service Date To' (2022-12-22). Below these are two dropdown menus: 'Forms' and 'Providers'. A green box highlights the 'Providers' dropdown menu, and a 'Search' button is located to its right.

Practice

Add parameters used to create Billing Rules as search filters

Core

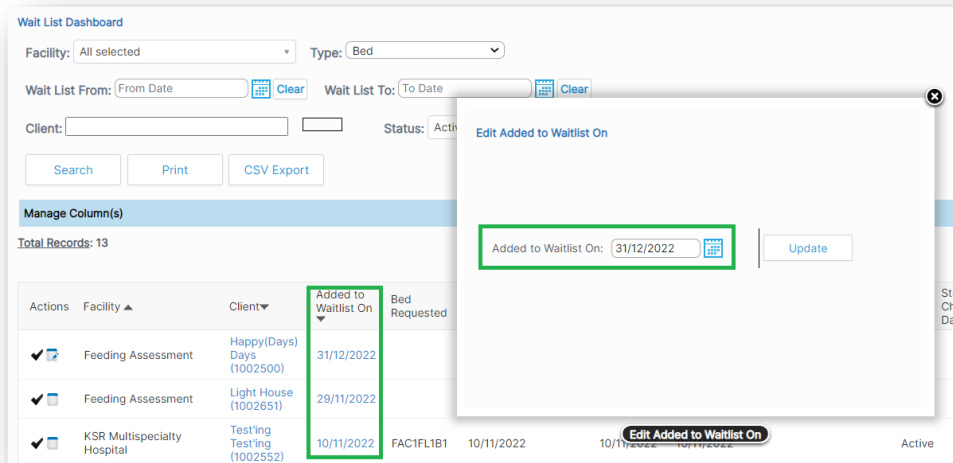
At **Practice** → **Administrative** → **Billing Rules** All parameters used for creating Billing rules to the search criteria for finding the Billing Rules.



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.



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'.

The screenshot displays the 'Billing Rules' configuration page in a web application. The interface is divided into a left sidebar with navigation options and a main content area. The 'Billing Rules' section is active, showing a grid of configuration parameters. The 'Encounter Billable' parameter is highlighted with a green box, and its dropdown menu is open, showing the options 'Any', 'Yes', and 'No'. Below the grid, there are 'Add' and 'Clear' buttons, and a search criteria section with a 'Rule Name' field and a 'Select Service' dropdown. The bottom of the page shows a similar grid for 'Service Types' with the 'Encounter Billable' parameter also highlighted.

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-1002659-1001681000(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

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

Svc Date: To:

Encounter status: (All) Collection Status: (All) Only encounters with balance due

| <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 | 0.00 | 3,200.00 |
| Total: | | | | | | | 6,600.00 | 0.00 | 0.00 | 3,400.00 |

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

Ind: [PID/HRN] Search Print

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

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.

The screenshot shows the 'Report - Individual Adjustments' interface. At the top, there are filters for 'By: Deposit Date', 'From: 12/06/2022', 'To: 12/06/2022', 'Month: January', and 'Year: 2022'. Below these are fields for 'Individual: First,Last(PID)/HRN', 'Insurance:', 'Description: --Select--', and 'Encounter Facility: Select Facility(s)'. A search bar is present with 'charges' entered, and a dropdown menu is open showing search results: '45 - Charges exceed your contracted/legislated fee arrangement', 'Charges exceed our fee schedule or maximum allowable amount', '24 - Payment for charges adjusted.', '40 - Charges do not meet qualificat', '45 - Charges exceed your contracted', and '59 - Charges are adjusted based on'. To the right of the search bar are buttons for 'Search', 'Print', and 'CSV Export'. Below the search bar is a table with 2 records. The table has columns: RES#, LAST NAME, FIRST NAME, PR, SURANCE, REASON, ADJ GROUP CODE, DATE OF ENTRY, and AD. The first record is for Peetz, Oaklee, with REASON 'Charges exceed your contracted/legislated fee arrangement' and DATE OF ENTRY '12/06/2022 02:10:30'. The second record is for Keltner, Paul, with REASON 'Charges exceed your contracted/legislated fee arrangement' and DATE OF ENTRY '12/06/2022 02:10:30'.

| RES# | LAST NAME | FIRST NAME | PR | SURANCE | REASON | ADJ GROUP CODE | DATE OF ENTRY | AD |
|---------|-----------|---------------|--------|------------------------------------|---|----------------|---------------------|----|
| 1004698 | Peetz | Oaklee | KE | Self Pay 0% Fees | Charges exceed your contracted/legislated fee arrangement | | 12/06/2022 02:10:30 | |
| | | Keltner, Paul | P-IMMS | 1004698.100168898 Self Pay 0% Fees | Charges exceed your contracted/legislated fee arrangement | | 12/06/2022 02:10:30 | |

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**.

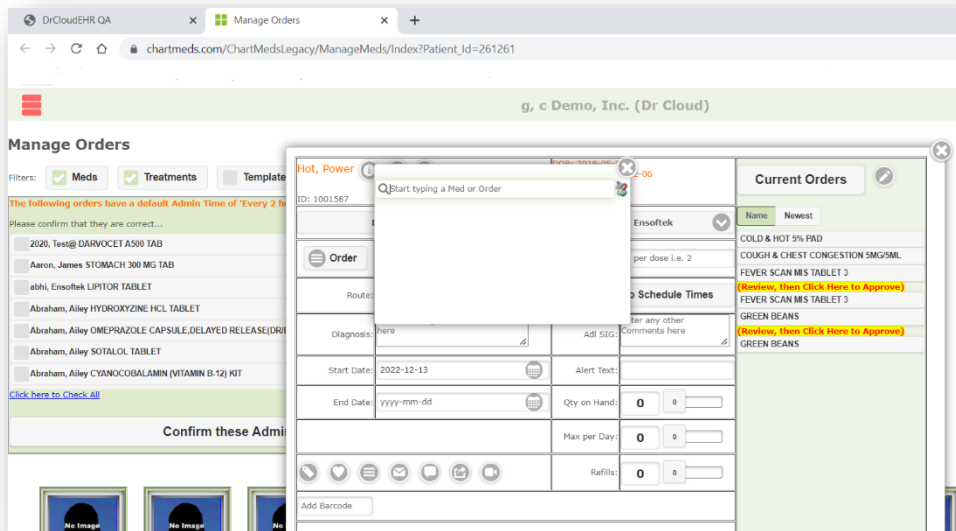
By default, the sync happens every **60 mins**.

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.

