



# 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](mailto:support@drcloudemr.com).

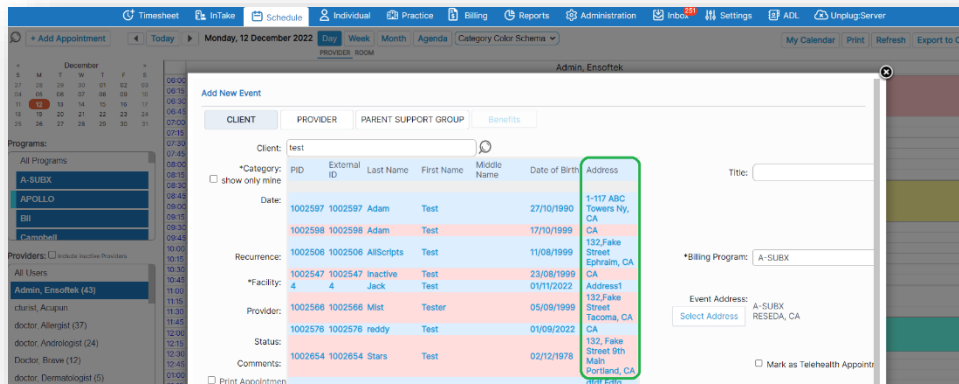
# Schedule

## Display Client Address in Scheduling Tool

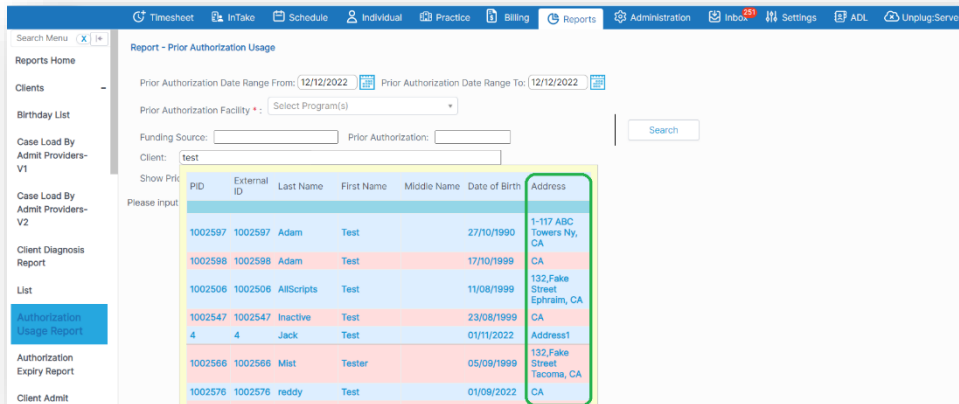


The **patient address** is now included in the patient search results throughout the application. The patient address is displayed along with **PID, External ID, Patient Last Name, First Name, Middle Name, and DOB** at Results.

### At Schedule:



### At Reports:



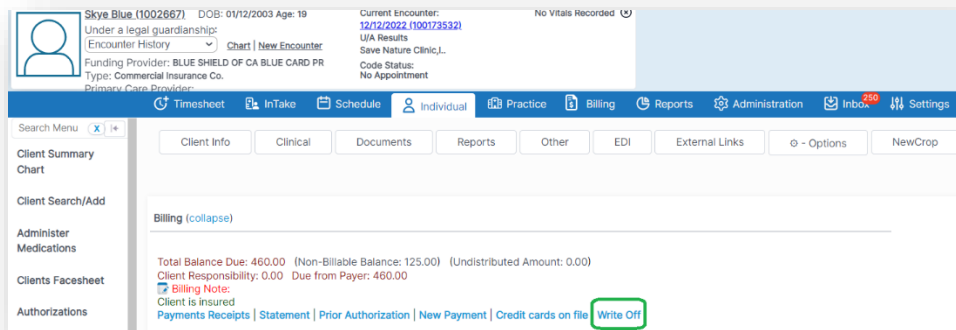
# Patients

## Write off entire client account balance

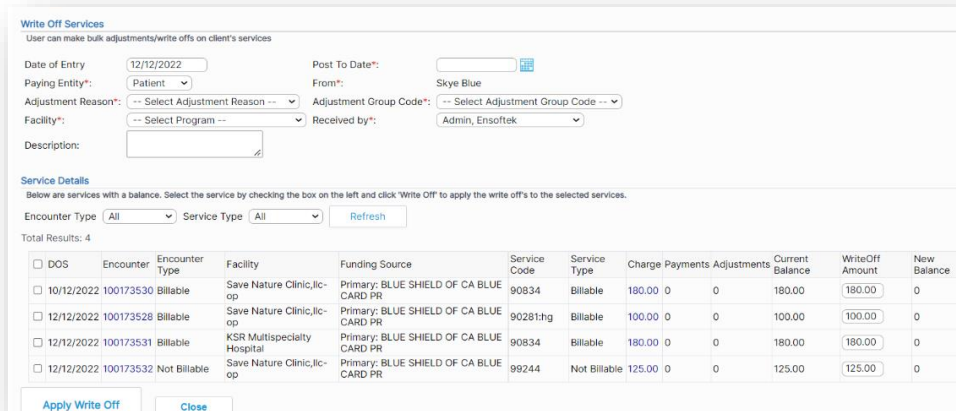
Core Setup

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,Ic-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,Ic-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,Ic-op	Primary: BLUE SHIELD OF CA BLUE CARD PR	90281hg	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,Ic-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 Home

Report - 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,Ic-op	1002867100173528		Coll w/o	Contractual Obligation	12/12/2022 16:55:54	100.00
			Admin, Ensoftek	Save Nature Clinic,Ic-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.

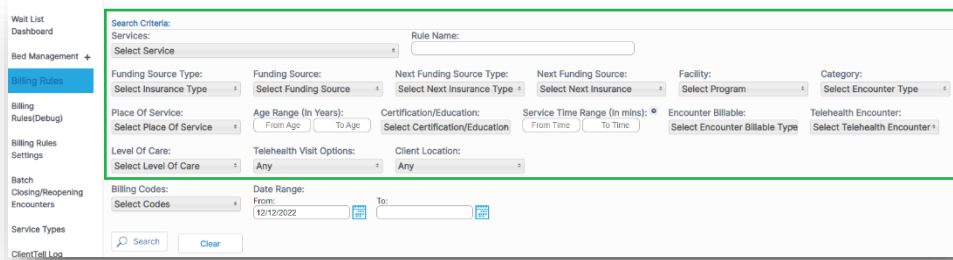
The screenshot shows the 'Client Report' form. It includes date pickers for 'Service Date From' (2020-06-22) and 'Service Date To' (2022-12-22). Below these are dropdown menus for 'Forms' and 'Providers'. A green box highlights the 'Providers' dropdown menu, and a 'Search' button is located to its right.

# Practice

Add parameters used to create Billing Rules as search filters

✔ Core

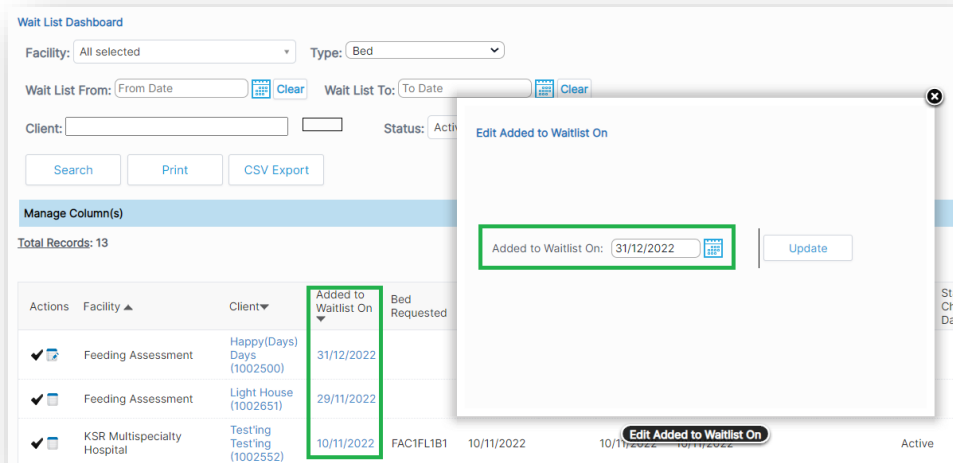
At Practice → Administrative → Billing Rules All parameters used for creating Billing rules to the search criteria for finding the Billing Rules.



## 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'.

# 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"/>	<a href="#">D-1002605-20221206221302</a>	Submitted	2022-12-06 22:13:02	DFT	2022-10-20	2022-10-20	Nature, Save (1002605)	<a href="#">Mouse Over Here</a>	100.00	CIGNA
<input type="checkbox"/>	<a href="#">P-1002632-1001685202(TEST)</a>	Submitted	2022-12-06 21:46:01	HCFA	2022-12-01	2022-12-01	Day, Good (1002632)	<a href="#">Mouse Over Here</a>	539.00	ANTHEM BLUE CROSS OF CA
<input type="checkbox"/>	<a href="#">I-1002632-1001686202(TEST)</a>	Printed	2022-12-06 21:46:04	UB-04	2022-12-01	2022-12-01	Jones, Adam (1002632)	<a href="#">Mouse Over Here</a>	405.00	ANTHEM BLUE CROSS OF CA
<input type="checkbox"/>	<a href="#">P-1002659-1001681000(TEST)</a>	Accepted	2022-12-12 11:57:12	HCFA	2022-12-12	2022-12-12	MERGE, MAIL (1002659)	<a href="#">Mouse Over Here</a>	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	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

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 a web application interface for generating an 'Individual Adjustments' report. 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 several options: '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 area is a table with 2 records. The table columns are RES#, LAST NAME, FIRST NAME, PR, ADJUSTMENT CODE, REASON, ADJ GROUP CODE, DATE OF ENTRY, and ACTION. The first record is for Peetz, Oaklee, with adjustment code 45 and reason 'Charges exceed your contracted/legislated fee arrangement'. The second record is for Keltner, Paul, with adjustment code 45 and reason 'Charges exceed your contracted/legislated fee arrangement'.

RES#	LAST NAME	FIRST NAME	PR	ADJUSTMENT CODE	REASON	ADJ GROUP CODE	DATE OF ENTRY	ACTION
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	1004698.100168898	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
  Setup
  Add-on

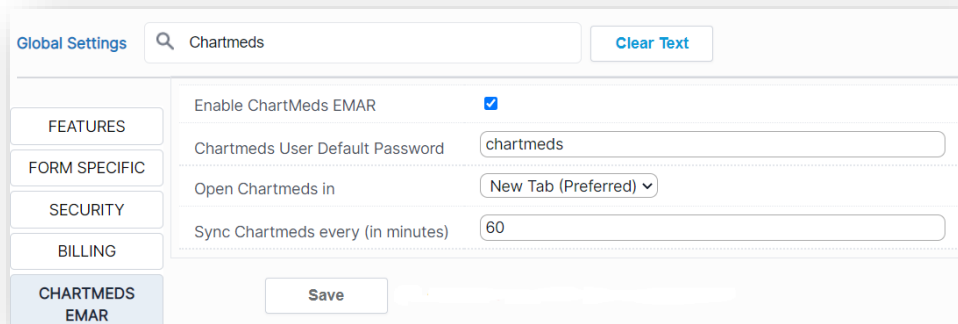
We can now set how often we want to sync the **ChartMeds data**.

**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**.

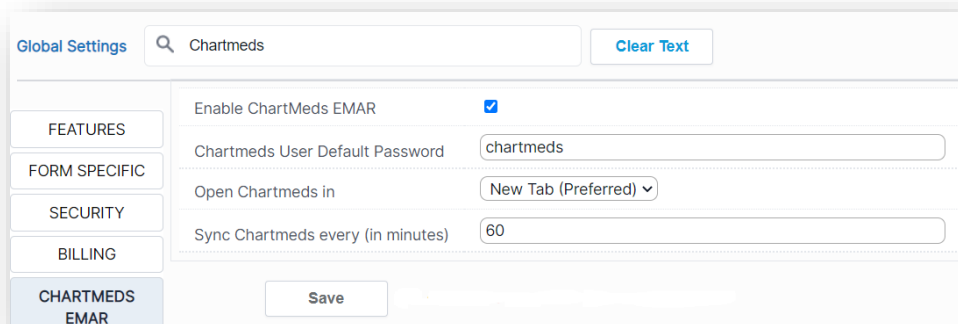
Two new Global Settings were introduced for this.

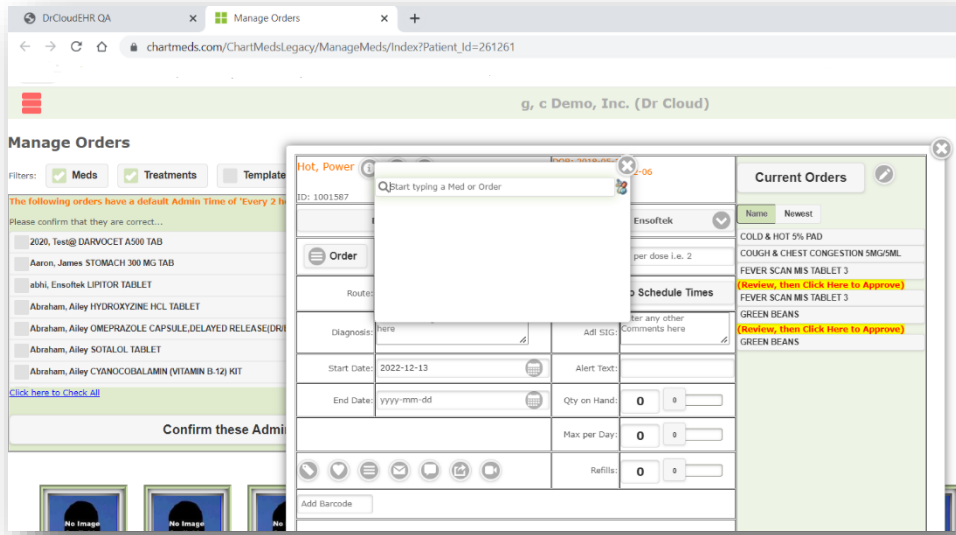
- Open ChartMeds in (The iframe or New Tab (Preferred option)) dropdown. The default is 'New Tab'
- Sync ChartMeds every --- (minutes). The default is 60 minutes



### 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.

