



# DrCloudEHR™ July Release Notes

Release to Staging Site – June 25, 2023

Release to Production Site – July 2, 2023

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## Overview

This document contains the Release Notes for July 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 the 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).

# Patients

## Provide Emergency access (Break the glass) to restricted charts

**Core** **Setup**

DrCloudEHR now offers a new setting that provides authorized users with emergency access to restricted charts.

- When the flag is enabled - excluded patients are not shown in the new patient search for users without the **"Emergency Access role"**.
- When disabled - excluded patients are shown in the new patient search for those Users.

Users with the Emergency Access role will see a **"Lock"** icon instead of a View button next to the excluded patient.

Actions	Name	Client DOB	Client Sex	External ID	PID	Payer Code	Admit Program(s)	Funding Source	# Enc(s)	Diagnosis	[Date (Days) of Last Encounter]
<a href="#">View</a>	TVS, VICTOR	09/01/2021	Female	1002701	1002701		APOLLO		0		
	VICTOR, TVS	09/01/2022	Female	1002575	1002575		KYR Superspecialty Hospital,BILNIMS,Occupational Therapy,APOLLO,PP Yellow Bricks	BLUE SHIELD OF CA...	29		12/07/2022 (187)
<a href="#">View</a>	VICTOR, TVS	09/01/2022	Female	1002863	1002863				0		

Once the user clicks on the Lock icon, a popup screen opens asking for a reason for access and a signature to view the chart.

Individual: TVS VICTOR  
 Note: The chart you are attempting to access is restricted. Please enter your reason for needing access or click Cancel to exit.

Enter Unlock Reason:

Click this check box to eSign.

[Unlock](#) [Cancel](#)

After viewing the chart, the user can click the lock icon again to lock the View button.

## Use the Client Lock/Unlock history report to view restricted chart access

**Core** **Setup**

The Lock/Unlock history report shows who accessed Clients that were Unlocked in the search and then Locked, along with their audit log between unlock datetime and lock datetime with Provider details.

Individual	Unlock Date	Unlock Reason
SPIRO REALMC (28961)	06/11/2023 18:58:52	Unlock this patient at patient search for yella user

## Ability to display co-pay in billing area on patient chart summary page

Core Setup

Added the primary Insurance co-pay details along with insurance names in Patient Demographics → Billing section.

**Billing** (collapse)

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Total Balance Due: 8,021.00 (Non-Billable Balance: 0.00) (Undistributed Amount: 9,099.00)  
 Client Responsibility: 0.00 Due from Payer: 17120.00  
**Billing Note: IN COLLECTIONS, IN COLLECTIONS**  
 Patient is insured  
P: DISNEY CHILDREN'S CENTER (Copay: \$25.00)  
[Payments](#) [Receipts](#) | [Statement](#) | [Prior Authorization](#) | [New Payment](#) | [Credit cards on file](#) | [Write Off](#)

## Patient Demographics → Updates to Notes

Core

Removed the "Date" column from the Notes section to display more of the "Content" column details and avoid duplication with the Content column.

Type	Content
Check Insurance Eligibility	06/14/2023 18:58 (Ensoftek Admin) Accountant should check the Insurance Eligibility and Benefits of this patient.
New Document	06/14/2023 18:58 (Ensoftek Admin) Need to ask Client and save all his documents in the system
Referral	06/14/2023 18:57 (Ensoftek Admin) Patient is referred by Outside Clinic/

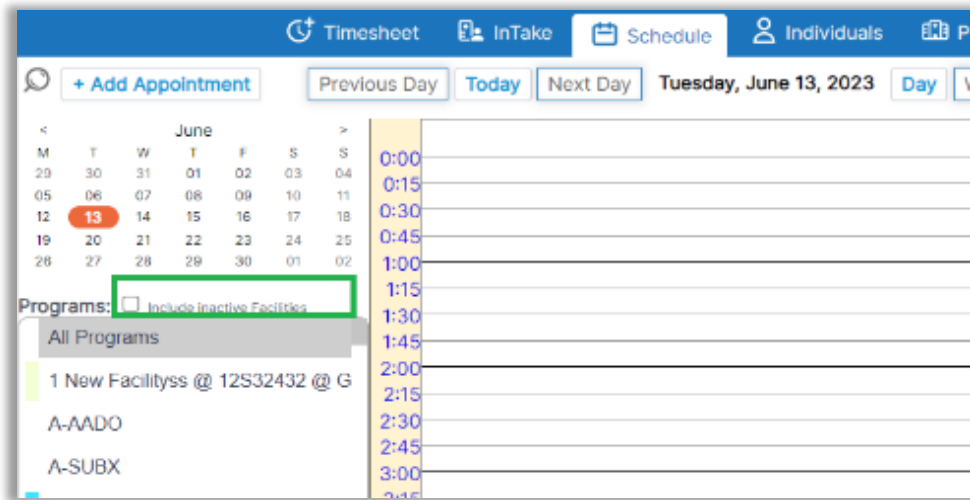
# Schedule

## Configuration options for inactive facilities

Core  Setup

Introduced a new global flag "**Display inactive Facilities in Normal/Hide/Red/Grey options**". The default option will be normal.

- Normal - all the facilities will be displayed in the default color - black.
- Red - in-active facilities will be displayed in red color.
- Grey - in-active facilities will be displayed in grey color.
- Hide - in-active facilities are not displayed on the facilities list
  - Note that the "Include inactive..." check box is also not displayed.



**Note:** To display in-active facilities, users need to check the "Include inactive Facilities" check box (at the calendar page left of the facilities list)

## Configuration options for patient's identity verification during check-in

Core Setup

DrCloudEHR now includes a new global flag "**Need Proof of identification for patient check-in**" to manage the patient's identity during check-in with the following options.

- None
- Warn and allow creating the appointment
- Stop the user from creating the appointment

When the above global flag is enabled, the system displays options to capture proof of identification.

The screenshot shows a modal window titled "Add Identification Details". It contains the following fields and controls:

- Type of Identity :** \* --Select-- (dropdown menu)
- Identification Details :** \* (text input field)
- Upload Document(s) :** (document upload icon)
- Documents attached to this event:** (table header)
- Table columns: Date Time, Document Name, View, Delete
- Buttons: Save, Close

The identity icon is displayed next to the Check-in button. When the identification details are captured the identification icon will be updated with a check mark.

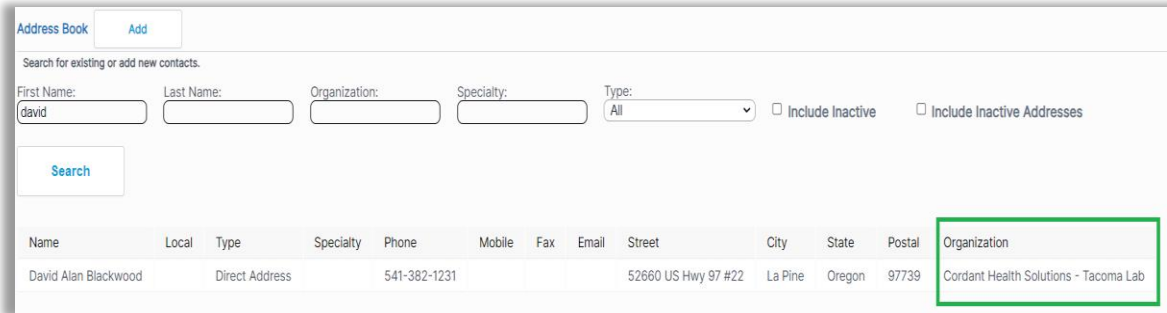
The screenshot shows the "Edit Event" form for an appointment. Key elements include:

- Event Type:** INDIVIDUAL (selected), Benefits, Copay Info not available
- Individual:** Health Tap, PID:1003018, External ID: 1003018
- Category:** Individual Psychotherapy, Allocate Room
- Date:** 06/13/2023, All day event (unchecked)
- Duration:** From 01:00 AM to 01:15 AM, 15 min
- Recurrence:** Repeats every day until (unchecked)
- Facility:** PP Yellow Bricks
- Provider:** 1Physician, 1Bright
- Supervising provider:** N/A
- Status:** Scheduled, Check In button
- Identification Verification:** A green box highlights the "Driving License : Driving License of individual" option, which includes a small icon of a license.
- Other fields:** Title: Individual Psychotherapy, Location: Offsite, Billing Program: Speech Assessment, Event Address: Select Address

# Practice

Added an "Organization" column in the Address Book List view

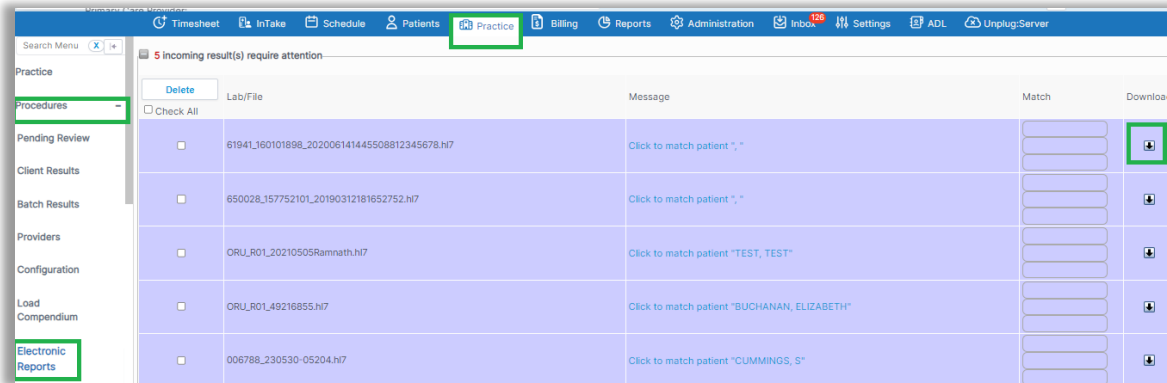
Core Setup



Ability to download Unmatched Lab Results

Core Setup

At Practice → Procedures → Electronic Reports/Lab Results → Unmatched Criteria, added a new column as a download with an Icon to download/view the lab results file received from the Lab.



Ability to make a copy of existing form completion criteria

Core Setup

Practice → Administrative → Form Settings, implemented a new 'Clone' icon to copy existing rules/forms completion criteria to quickly create new forms.



**Note:** The clone button is only displayed when the "From and To" dates are entered for previous completion fields.



# Reports

## Encounter Category filter added to the Duplicate Encounter Report

✔ Core

**Report - Duplicate Encounters**

Encounter From Date: 06/13/2023    Encounter To Date: 06/13/2023    Encounter Type: All    Exclude Encounter(s): Open

Encounter Provider:    **Encounter Category:**    Search

Individual: First,Last(PID/HRN)

## Users Notified about Excluded charts being included in reports

✔ Core

The following reports notify a user when excluded patients are included in the report:  
*Supervisor's Rejection Notes | Provider productivity by v2 | Last seen patients  
 Encounter Details Report | Transactions Report | Caseload by Admit Providers V1  
 Caseload by Admit Providers V2 | Provider Service Report | Encounter Report*

Show only Encounters with Incomplete Forms  
 Show Encounters that do not have Feesheet

ⓘ Please note that the displayed encounters may be incomplete as certain records have been excluded from your current view.

**Manage Column(s)**

Total Number of Encounter(s): 2

Provider	Date	Duration (Mins)	Units	Individual	Client Status	DOB	Age	External ID	PID	Category	Billing Status	Encounter Status
Admin, Ensoftek	05/30/2023 7:45 AM			Labor, Manuel K	Active	08/03/2003	19 year(s)	1002496	1002496	Adaptive Skills Assessment	Empty	Open

## Added payor (current insurance) as a column in the Bed Utilization Report

✔ Core

The "**Bed Utilization Report**" now displays the primary payor in the list based on the facility.

**Report - Bed Utilization**

Individual: First,Last(PID/HRN)

Admitted Facility: Select Program(s)

Building: --Select--    Floor: --Select--    Room: --Select--

Room Type: --All--    Bed: --Select--    Bed Type: --All--

Admit Date From: 06/01/2023    Admit Date To: 06/13/2023

Search    Print    CSV Export

Records: 22

First Name	Last Name	Facility	Building	Floor	Room	Room Type	Bed	Bed Type	Allocated	Released	No. of days used	Provider	Payor
Peter	Owt	A-SUBX	SUBX / SUBX	Subx / Floor 1	1	Shared	1	Adult	02/13/2023	Not Yet	121	Admin Ensoftek	
Test	AllScripts	KSR Multispecialty Hospital	FAC1 / peter owt	FAC1FL1 / FacFirst	109	Shared	4	Adult	11/10/2022	Not Yet	216		P: HEALTH NET
Theresa	Green	KSR Multispecialty Hospital	FAC1 / peter owt	FAC1FL1 / FacFirst	109	Shared	5	Adult	01/06/2023	Not Yet	159	Admin Ensoftek	P: ANTHEM BLUE CROSS OF CA

# Electronic Treatment Administration Record (eTAR)

*Ability to auto-populate "Administered At" times to match the "Scheduled Time"*

Core  Setup

There is a new setting available to auto-populate the times in the "**Administered At**" column the same as "**Scheduled Time**" in the eTAR.

From Date: 06/13/2023 12:00 AM To Date: 06/14/2023 12:00 AM Treatment/Medication: acetaminophen  
 Drug: acetaminophen Dose: 2 suspension (160 mg/5 mL)

Treatment Date	Scheduled Time	Administered At	Status	Qty	CIWA	COWS	Notes	Client Signature	Administered By
06/13/2023	8:00 AM	8:00 AM	Given (Full)	2				Cambel POP has e-signed	Ensoftek Admin has e-signed
06/13/2023	2:00 PM	2:00 PM	--Select--					<input type="checkbox"/> Click to eSign.	<input type="checkbox"/> Click to eSign.
06/13/2023	9:00 PM	9:00 PM	--Select--					<input type="checkbox"/> Click to eSign.	<input type="checkbox"/> Click to eSign.

# Inbox

*Search messages in the Reminders section of the Activity Center/Inbox*

Core  Setup

Implemented the Patient search filter in the **"Inbox-Reminders"** section, results can now be displayed based on the client's name.

The screenshot displays the 'Reminders' section of the Ensoftek interface. At the top, there is a navigation bar with icons and counts for: Reminders (548), Review Forms (0), Transactions Reviews (0), Treatment Plan Reviews (1), Upcoming Appointments, DrFirst Notifications, Messages (0), and Birthdays. Below this, the 'Reminders(collapse)' section contains buttons for 'View Log' and 'Send Reminder'. A search area includes a 'Search By' dropdown set to 'Select type of reminder(s)', a 'Search' button, and two action buttons: 'Set Selected As Complete' and 'Set All (19) As Completed'. A search result is highlighted with a green box, showing 'Individual: Cambel POP', 'PID: 1002697', and 'External ID: 1002697'. Below the search area are 'Sort By' options: Individual (selected), Due Date, and Priority. At the bottom, there is a table header with columns: Priority (checkbox), From (dropdown), Action, Due Date (dropdown), Individual (dropdown), and Description (dropdown).

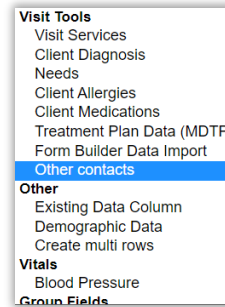
# Form Builder

*New Data Type "Other Contacts" is Available in the Form Builder.*

Core  Setup

Now you can use the "Other Contacts" Data Type when building custom forms using the Form Builder to manage Other Contacts for a patient.

Authorized Form Builder Users have the option to pick the fields to be displayed in the Form.



The screenshot shows the configuration interface for a form field. At the top, a dropdown menu is set to 'Other contacts'. Below this, there are two input fields: 'Field Name' (containing 'Field Name') and 'Field Description' (containing 'Current Field Description'). Underneath these are two checkboxes: 'Show Field Title:' (checked) and 'Hide:' (unchecked). A red-bordered box highlights the 'Details to Include as Data Column to be displayed on form:' section, which contains a grid of 14 checkboxes, all of which are checked: Name, Relationship, Email, DOB, Address, City, County, State, Zip Code, Home phone #, Cell Phone #, Work phone #, Notes, Place of service, and Other #.

This is how the record is displayed within the form.

The screenshot shows a form record for a section titled 'OTHER CONTACTS'. It features a table with 15 columns: Name, Email, Address, County, Zip Code, Cell Phone, Relation, DOB, City, State, Home Phone, Work Phone, Other Phone, Place of service, and Notes. Below the table are two buttons: 'Add New Contact' and 'Add Existing Contact'.

*The Form Builder Service Code widget can now be associated with codes added to the form*

Core  Setup

The "**Total service duration to match with visit duration**" global flag has been updated to associate the Form Builder Service Code widget with the codes added to the form.

When a Form Builder form has a Start/Stop time:

- User is restricted from saving the form when the total duration of all the services from the service widget is not equal to the duration of the Start/Stop time on the form.

When a New Encounter has the summary feature enabled:

- User is restricted from saving the encounter when the total duration of all the services from the summary section is not equal to the encounter duration.

When Closing the Encounter:

- User is restricted from closing the encounter when the total duration of all the services from the summary section is not equal to the encounter duration.

Ability to add the duration for each service code at "New Encounters".

The screenshot shows a form for creating a new encounter. At the top, there are fields for 'To Date of Service' (05/18/2023 09:10 AM), 'Onset/hosp. date', 'Provider' (Administrator, Enso), and 'Registered Interpreter Offered'. Below these are input fields for 'Duration in Mins' (120), 'Duration in Units' (8), 'Telehealth' (checkbox), 'Telehealth Visit Options' (Select), and 'Individual Location' (Select). A red box highlights the 'Duration in Mins' field. Below the form is a table titled 'Services Performed' with columns: Duration, Units, Service Code, Modifier, Diagnosis Pointer with Precedence, and Actions Available. The table contains one row: Duration: 120, Units: 1, Service Code: H0001-HF Alcohol and/or Drug Assessment, Modifier: HF, Diagnosis Pointer with Precedence: ICD10-A56.00, Actions Available: [checkbox], [checkbox], [Remove].

Ability to add the Duration for each service code on FB Form's service widget.

The screenshot shows a 'FB Form's service widget' with 'Start Time' (02:00 AM) and 'Stop Time' (04:00 AM) fields. Below is a table with columns: Duration, Units, Code, Code Id, Modifier, Code Description, and Billable. The table contains two rows: Row 1: Duration: 100, Units: 7, Code: HCPCS, Code Id: H0004, Code Description: Behavioral health counseling and therapy, per 15 minutes, Billable: [checkbox], [X]. Row 2: Duration: 20, Units: 1, Code: CPT4, Code Id: 90296, Code Description: Diphtheria antitoxin, equine, any route, Billable: [checkbox], [X]. Below the table is an 'Add Service' button.

Ability to add the duration for each service code on "Close Encounter".

The screenshot shows the 'Closing Summary' screen. At the top, it says 'Check that all services and justifying diagnosis are correct before closing encounter'. Below are fields for 'Encounter Start Time' (05/18/2023 2:24 AM), 'Encounter End Time' (05/18/2023 4:24 AM), 'Encounter Duration' (120), and 'Encounter Units' (8). A red box highlights the 'Encounter Duration' field. Below is a table titled 'Services Performed' with columns: Duration, Units, Service Code, Modifier, Diagnosis Pointer with Precedence, and Actions Available. The table contains three rows: Row 1: Duration: 20, Units: 1, Service Code: H0001-HF Alcohol and/or Drug Assessment, Modifier: HF, Diagnosis Pointer with Precedence: ICD10-A56.00, Actions Available: [checkbox], [checkbox], [Remove]. Row 2: Duration: 20, Units: 1, Service Code: 90690 Typhoid vaccine, live, oral, Modifier: [blank], Diagnosis Pointer with Precedence: ICD10-A56.00, Actions Available: [checkbox], [checkbox], [Remove]. Row 3: Duration: 80, Units: 8, Service Code: H0004-HF Behavioral health counseling and therapy, per 15 minutes, Modifier: HF, Diagnosis Pointer with Precedence: ICD10-A56.00, Actions Available: [checkbox], [checkbox], [Remove]. Below the table is an 'Add Service' button and a 'Registered Interpreter Offered' dropdown menu (Not Offered). At the bottom is a 'Save and Close' button.