



**ensoftek**<sup>®</sup>

**DrCloudEHR<sup>™</sup>**  
**June 2024 Release Notes**

Release to Staging Site – May 26, 2024

Release to Production Site – June 2, 2024

# Table of Contents

- Patients** ..... 4
  - Showing the Pharmacy name on the updated medication list..... 4
  - Ability to see the initial measures entered in MDTP or during MDTP Supervisor review..... 4
  - New option to "Show Inactive Medications" in the Patient Summary Chart..... 5
- Practice** ..... 6
  - The Golden Thread Error Report now shows when a rule is due..... 6
  - Fax cover sheet options for outgoing faxes..... 6
- Billing** ..... 7
  - Improvements to payment allocation filters ..... 7
  - New filter to show the results for the associated X12 partner..... 7
  - Automated "Type of Bill" assignment for IOP services on UB04 claims ..... 8
- Reports**..... 9
  - RIN Number now available in the encounters report..... 9
  - Enhanced the Outpatient Engagement Retention report for PHQ-9 scoring with visual indicators..... 9
- Inbox** ..... 10
  - Only show tasks/reminders for admitted clients..... 10

## Overview

This document contains the Release Notes for June 2024. 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**

Available to all users when released



**Add-on**

Dependent on the activation of other feature(s)



**Setup**

Some setup is required after the release



**Add-on**

Requires purchase and additional setup

Please note that the terms **client**, **patient**, and **individual** are used interchangeably throughout this document, depending on the feature.

If you have questions regarding staging sites or this release, please contact our support team at [support@drcloudemr.com](mailto:support@drcloudemr.com).

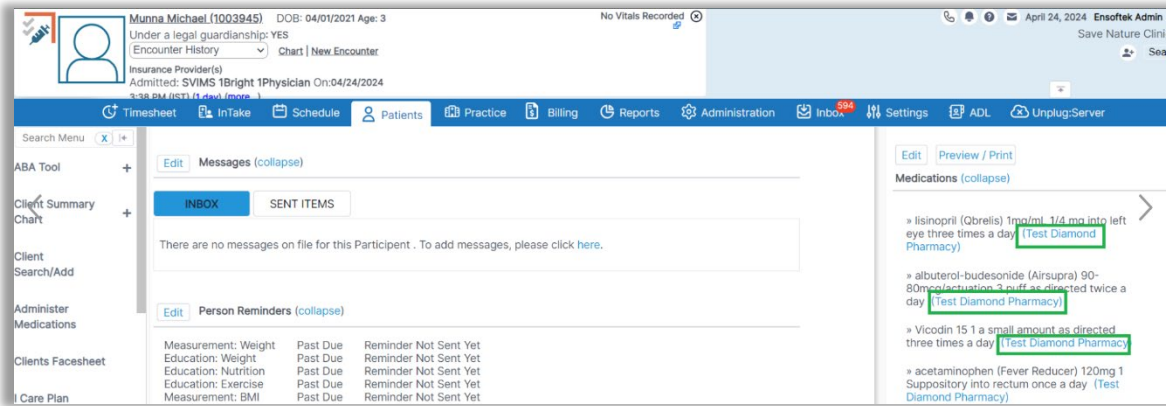
# Patients

## Showing the Pharmacy name on the updated medication list

Core  Setup

DrCloudEHR now shows the Name of the Pharmacy, where the medication was sent in the following sections:

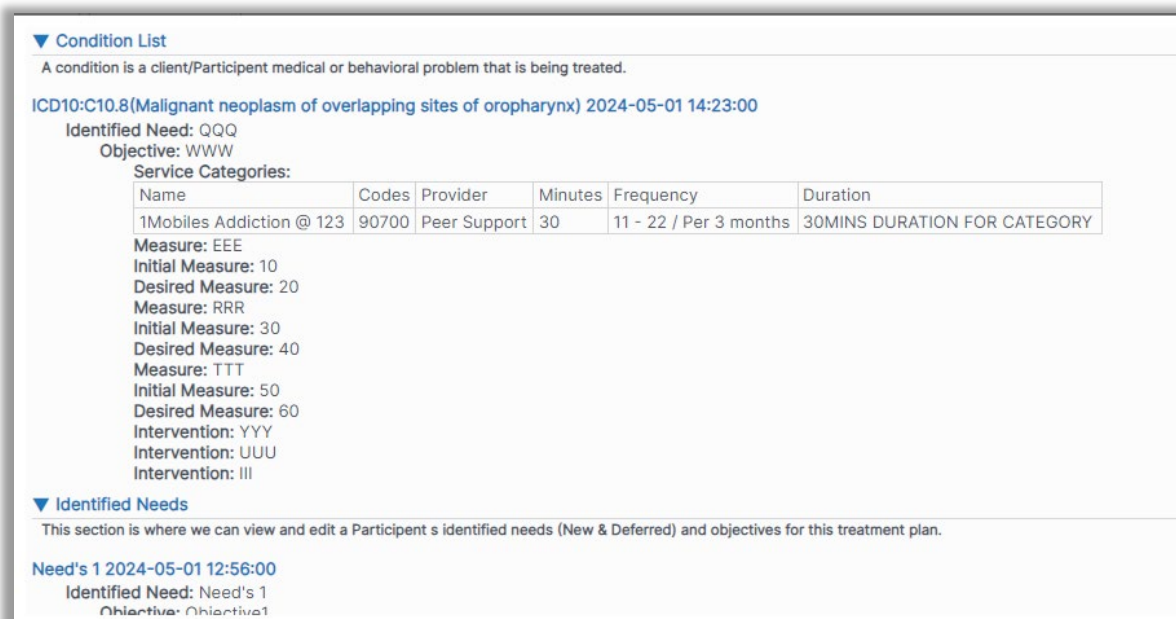
1. Patient Summary Chart > Medications (View)
2. Patient Summary Chart > Clinical > Diagnosis > Medications section
3. Medications > Print



## Ability to see the initial measures entered in MDTP or during MDTP Supervisor review

Core  Setup

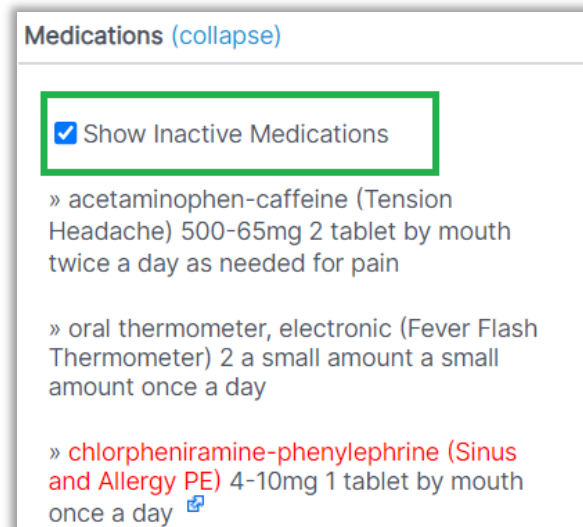
DrCloudEHR now shows the Initial Measures entered and the Desired Measure for Conditions/Identified needs. Please refer to the screenshot below showing the measures in inbox-Reminders.



## New option to "Show Inactive Medications" in the Patient Summary Chart

Core  Setup

Authorized users now have the option to see active medications in the Patient Summary Chart by checking the "Show Inactive Medications" checkbox in the Medications widget. When checked, the system will show all medications in the patient's history with inactive medications in "RED". By default, this box is not checked.



# Practice

The Golden Thread Error Report now shows when a rule is due

Core  Setup

Authorized staff can now see when a particular Golden Thread Rule(s) under the new Due Date column running the Golden Thread Error Report. Practice > Golden Thread Rules > Golden Thread Error Report: added a new column as "Due Date" for each of the Golden Thread Rules triggered.

PID	Name	Date of Service	Encounter ID	Encounter Provider	Encounter Category	Due Date	GT Rule
10028	Think Pad	05/15/2024	100190680	Ensoftek Admin	Admission	05/15/2024	Treatment plan message
10028	Think Pad	05/15/2024	100190680	Ensoftek Admin	Admission	05/15/2024	Youth Chemical Assessment not completed criteria
10028	Think Pad	05/15/2024	100190680	Ensoftek Admin	Admission	05/15/2024	14 day treatment plan
10028	Think Pad	05/15/2024	100190679	Ensoftek Admin	Admission	05/15/2024	Treatment plan message
10028	Think Pad	05/15/2024	100190679	Ensoftek Admin	Admission	05/15/2024	Youth Chemical Assessment not completed criteria
10028	Think Pad	05/15/2024	100190679	Ensoftek Admin	Admission	05/15/2024	14 day treatment plan
1003969	Healthy Life	05/15/2024	100190678	Ensoftek Admin	Case Management - Mental Health	05/15/2024	Treatment plan message
1003969	Healthy Life	05/15/2024	100190678	Ensoftek Admin	Case Management - Mental Health	05/15/2024	Youth Chemical Assessment not completed criteria
1003969	Healthy Life	05/15/2024	100190678	Ensoftek Admin	Case Management - Mental Health	05/15/2024	14 day treatment plan
1003641	Save Animals	05/15/2024	100190719	Endocrinologist doctor	Adaptive Skills Assessment	05/15/2024	Treatment plan message
1003641	Save Animals	05/15/2024	100190719	Endocrinologist doctor	Adaptive Skills Assessment	05/15/2024	Youth Chemical Assessment not completed criteria
1003641	Save Animals	05/15/2024	100190719	Endocrinologist doctor	Adaptive Skills Assessment	05/15/2024	14 day treatment plan

## Fax cover sheet options for outgoing faxes

Core  Setup

Practice > Administrative > Fax Center > Outgoing Faxes

Authorized users can now request whether to allow outgoing faxes with or without a Cover Note. This only applies to agencies that are using the integrated Upland Software (InterFAX) eFAXing module,

Enable Fax  
 InterFAX ID: salesdemo  
 InterFAX Password: .....  
 InterFax API for Outgoing Faxes: https://ws.interfax.net/dfs.asmx?WSDL  
 InterFAX API for Incoming Faxes: https://ws.interfax.net/inbound.asmx?WSDL  
 Enable Facility Level Fax  
 Cover Note at Send Fax: **To Prompt an allow Fax without Cover Note** (selected)  
 Options: To Prompt an allow Fax without Cover Note, To Restrict from sending out the Fax without Cover Note

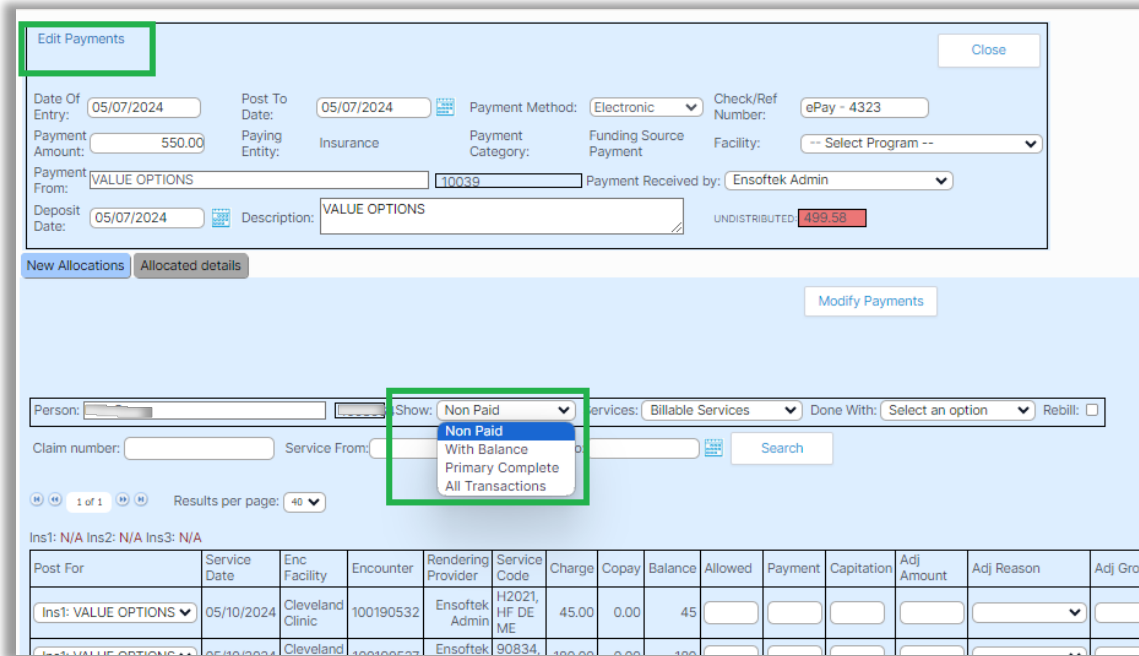
# Billing

## Improvements to payment allocation filters

Core Setup

Billing > Payments > Edit Payment > At Payment allocation, changed the Show transactions option to a dropdown list with the following options:

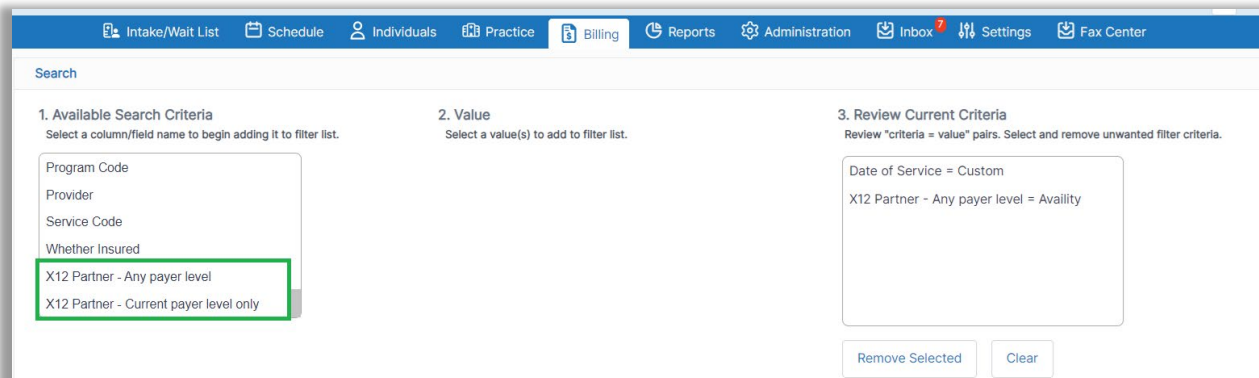
- Non-Paid - no payments/adjustments have been made.
- With Balance: show all services with balance greater than zero.
- Primary Complete: Show services with a balance and done with the Primary Insurance.
- All Transactions: Show all services (including ones without a balance due)



## New filter to show the results for the associated X12 partner

Core Setup

DrCloudEHR now includes a new filter "X12 partner - Current payer level only" where it will fetch only the results of encounters with current payer level only.



## *Automated "Type of Bill" assignment for IOP services on UB04 claims*

Core  Setup

Now, DrCloudEHR will attempt to assign the "Type of Bill" (first/last/continual) in the Fee-Sheet based on the encounters during the client's admission period.

A new option is available in Claim Rules for UB-04 claims. When enabled, DrCloudEHR will review the encounters being billed for the admission period and assign the Type of Bill value while generating a claim.



# Reports

## RIN Number now available in the encounters report

Core  Setup

Implemented the RIN column in the encounter report. Based on the global flag, the RIN value will be displayed in the report column.

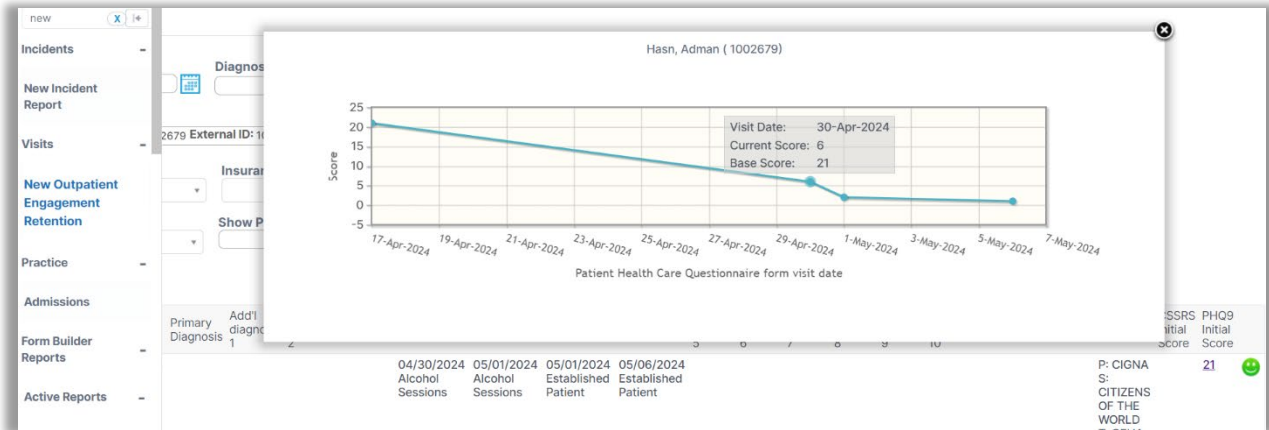
Provider	Date	Duration (Mins)	Unit(s)	Person	External ID	PID	RIN	Category	Billing Status	Encounter Status	Enc No	Encounter	Facility	Program
Acupuncturist Doctor	05/20/2024 12:00 AM	0	1	Natur, Lasan Mani	1003665	1003665	4343 43646 4355	Daily Room Charges	Open	Closed	100183961	Room & Boarding	Save Nature Clinic	
Total Duration for Acupuncturist		0	1											

## Enhanced the Outpatient Engagement Retention report for PHQ-9 scoring with visual indicators

Core

The Outpatient Engagement Retention Report now includes:

- Visual indicators based on the latest PHQ9 score.
  - Green icon to show a low PHQ-9 score and "Red" for a high score.
- PHQ9 score graph.
  - Show Base Score, Current Score, and Date of Service.



## Inbox

*Only show tasks/reminders for admitted clients*

Core  Setup

New setting is available to filter Inbox tasks/reminders. Staff can filter based on whether a client is admitted.

The screenshot shows the Ensoftek software interface. The top navigation bar includes 'Wait list', 'Schedule', 'Clients', 'Practice', 'Billing', 'Reports', 'Administration', 'Inbox', and 'Settings'. The 'Inbox' tab is active, showing a 'Reminders' section with a '101' notification badge. Below the navigation bar, there are several icons for 'Reminders', 'Review Forms', 'Upcoming Appointments', 'DrFirst Notifications', 'Messages', 'Prior Authorization(s)', 'Contract Expiry', 'Counselor Dashboard', and 'Applicants'. The 'Reminders' section is expanded, showing a 'View Log' and 'Send Reminder' button. Below these are search filters for 'Select type of reminder(s)' and 'Client:'. There are also buttons for 'Set Selected As Complete', 'Set All (101) As Completed', and 'Show All'. A 'Sort By' section includes radio buttons for 'Client', 'Due Date', and 'Priority'. A green box highlights the checkbox 'Show reminders of only patients that are currently admitted'. Below this is a table of reminders.

Priority	From	Action	Due Date	Client	Description
High	Administrator, Ensoftek		12/15/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(14), Assigned(14), Unmatched(0)
High	Administrator, Ensoftek		12/16/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(5), Assigned(4), Unmatched(1)
High	Administrator, Ensoftek		12/18/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(1), Assigned(1), Unmatched(0)
High	Administrator, Ensoftek		12/19/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(9), Assigned(9), Unmatched(0)
High	Administrator, Ensoftek		12/20/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(13), Assigned(13), Unmatched(0)
High	Administrator, Ensoftek		12/21/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(11), Assigned(10), Unmatched(1)
High	Administrator, Ensoftek		12/22/2023 (Overdue)		Wellness Outcome Referrals: Downloaded(4), Assigned(4), Unmatched(0)
High	Administrator, Ensoftek		01/03/2024 (Overdue)		Wellness Outcome Referrals: Downloaded(6), Assigned(6), Unmatched(0)