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DrCloudEHR™
March Release Notes

Release to Staging Site – February 26, 2023

Release to Production Site – March 05, 2023

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Overview

This document contains the Release Notes for March 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 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.

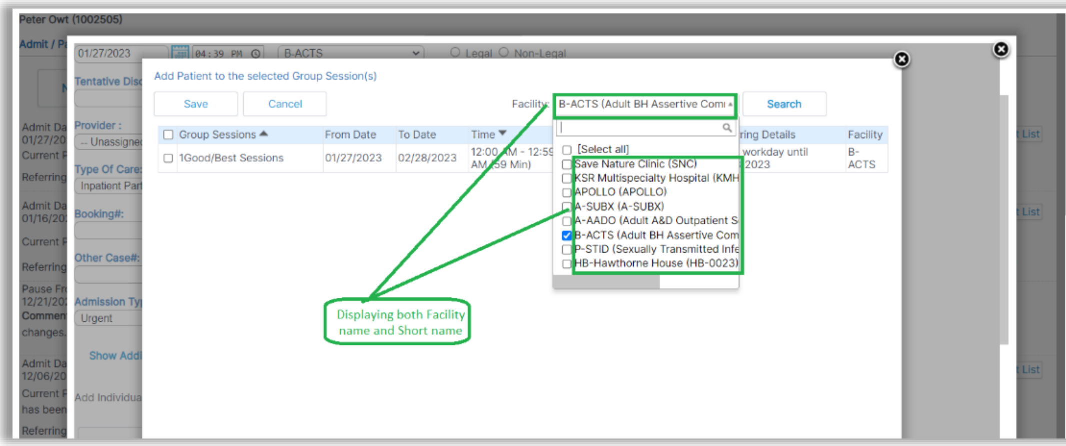
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Patients

Added Short Name to the facility drop-down list in the admit /pause/ discharge screen

✅ **Core**

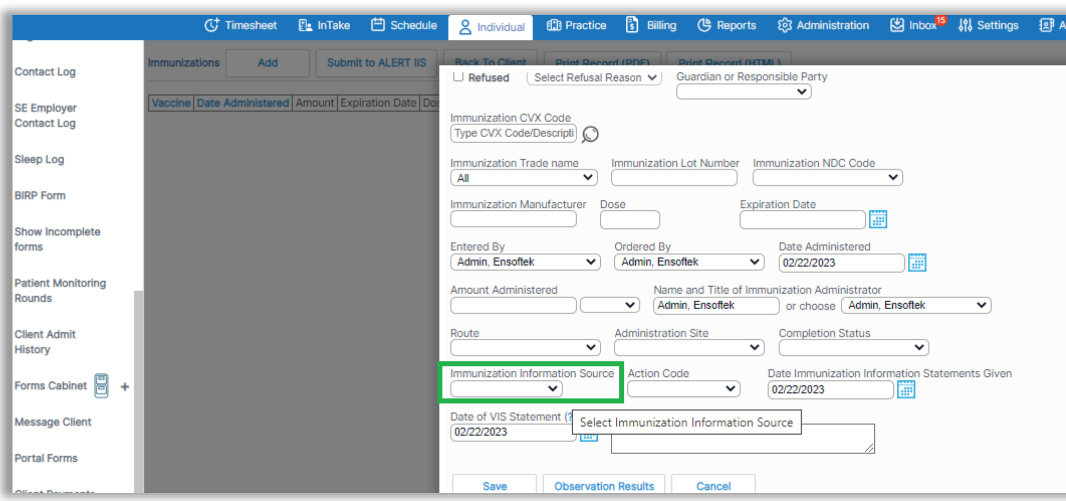
Now users can pick the appropriate facility from the list of facilities when adding clients to group sessions using the facility's **"Short Name".**



Immunization Registry - RXA-9 Field now updated to include an indicator for a new or historical immunization record

✅ **Core**

DrCloudEHR includes an indicator for a new or historical immunization in the RXA-9 field in the data that is submitted to immunization registries such as ALERT IIS in Oregon. This value is populated from the **"Immunization Information Source"** field when adding or updating an Immunization record.



Option to hide the Check-Out Date field on the New Encounter Form

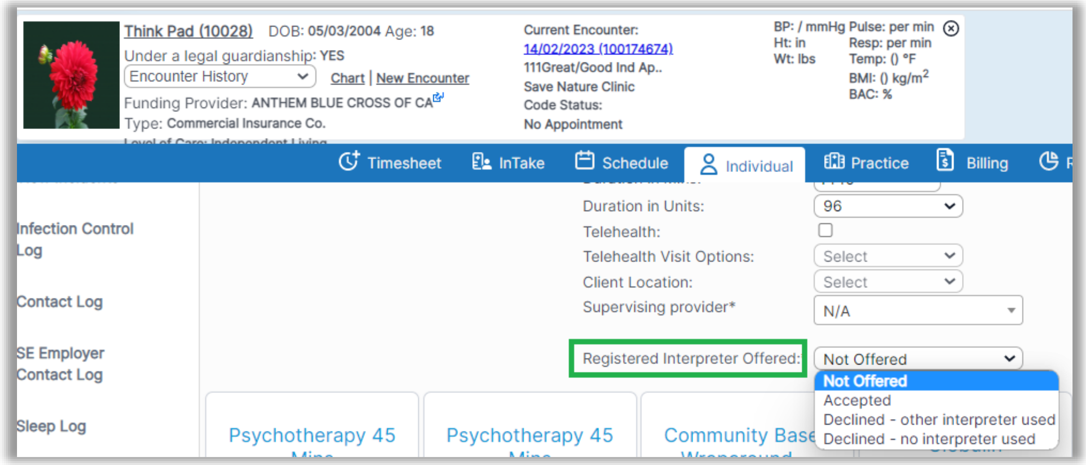
Core   Setup

DrCloudEHR includes a new option to hide the **"Check-out Date field"** on the New Encounter Form.

Ability to record interpreter information for appointments

Core   Setup

DrCloudEHR includes an option to record if a client was offered an interpreter for an appointment, and when accepted, authorized users can record the interpreter's details such as Name, Registry Number, and Language.



***NOTE:** On the New Encounter Form, **"Not Offered"** is the default.*

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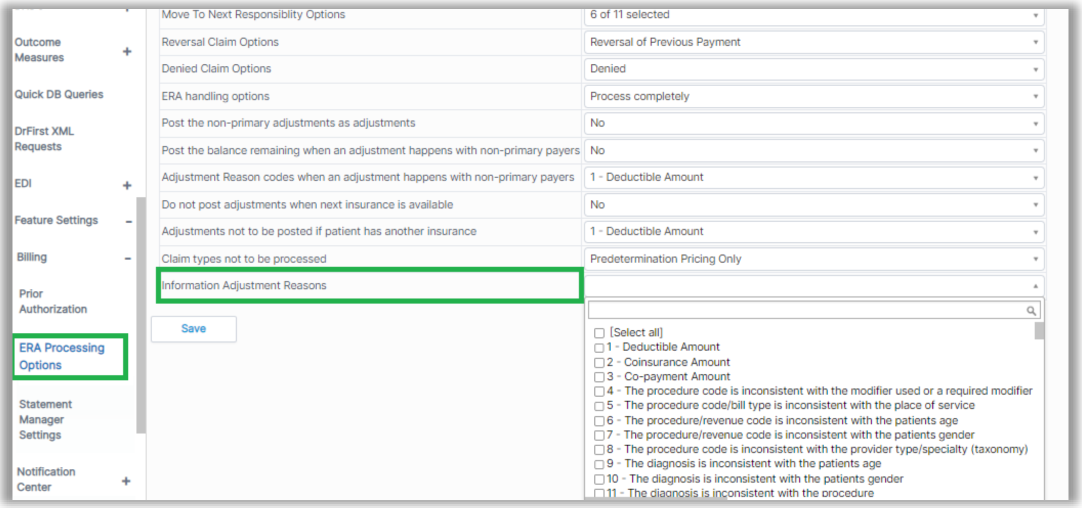
Practice

ERA Processing Options – Adjustment reasons for information only

Core

Sometimes adjustments in ERA are neither denial nor an actual adjustment but just information only, to support this use case, there is now a new option available to pick in the ERA settings under **"Information Adjustment Reasons"**. Authorized users can configure one or more codes to be marked as information adjustment reasons. When an ERA process includes these reasons, DrCloudEHR will post a line in the ERA report and a line on the invoice page.

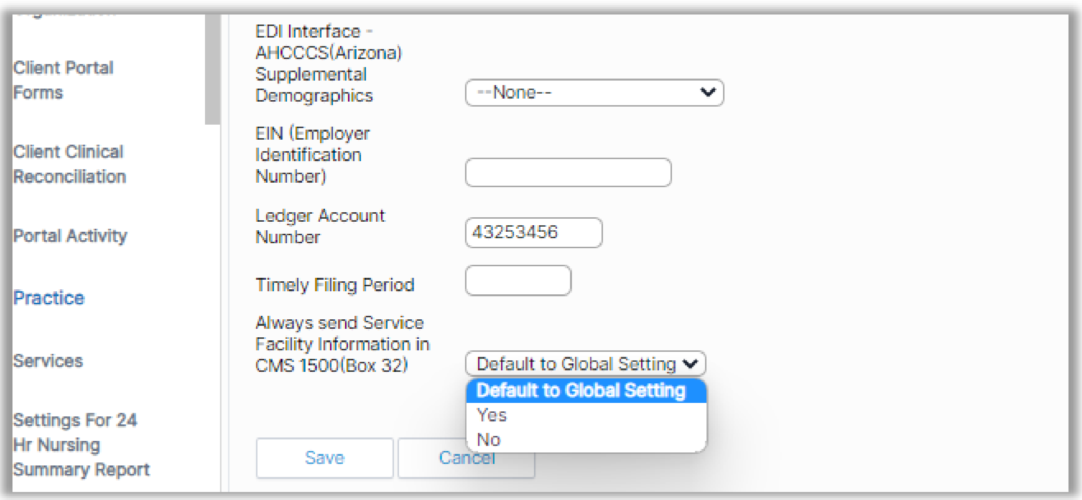


Updates to Service Facility NPI in CMS 1500 (Box 32)

Core Setup

When the NPIs of the Service facility and Billing facility is the same, some payers reject those claims. To avoid this rejection DrCloudEHR includes a configurable option in the payor/insurance record.

Authorized users can override the global setting to always include **"Service Facility Information"** in the claim.

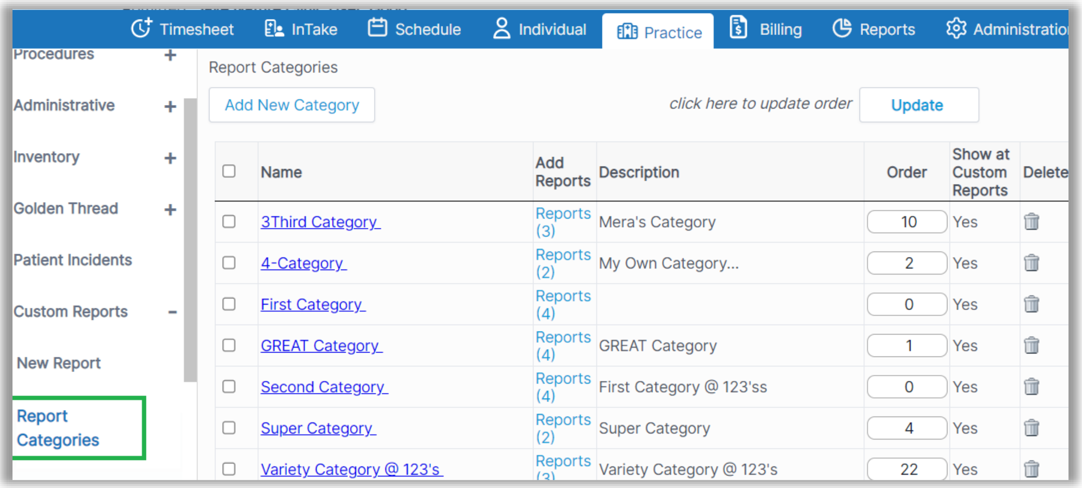


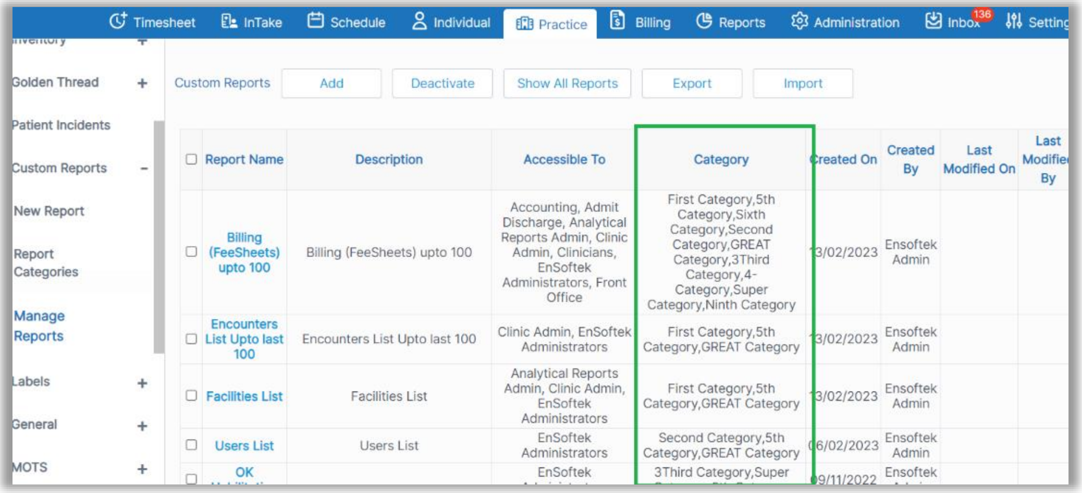
Option to categorize and organize Custom Reports in the Left Menu

Core Setup

Authorized users can now create various categories to organize all the reports created using Custom Reports Generator. Users can create and manage the categories under **Practice→Custom Reports-→ Report Categories**. They can assign/view category information under **Practice→Custom Reports→Manage Report**. Once configured, DrCloudEHR will group the reports by category and provide them as sub-links under each category in the Left Menu.

NOTE: *All existing Custom Reports without a category will be listed under the* ***"General"*** *category.*

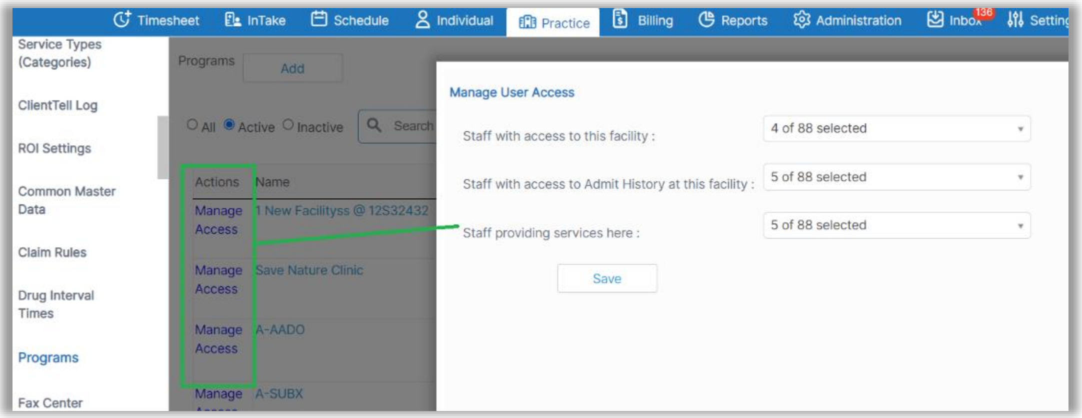




Ability to manage user access to admit history, facility, and service facilities in one interface

Core Setup

For agencies that restrict user access to certain facility data, authorized users can now easily manage user access to admit, history, facility, and service facilities from one single screen.



Billing

Ability to indicate when to bill remaining balance to next level payer at payment allocation screen

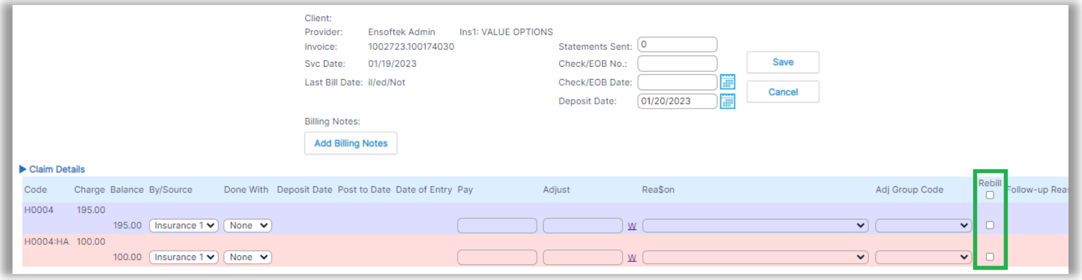
Core

When the payment/adjustment from the Primary Insurance is received and no more payments are expected from the Primary Insurance, then Authorized users can now mark the claim as **"Done with Ins1"**. The same applies to secondary and tertiary insurance.

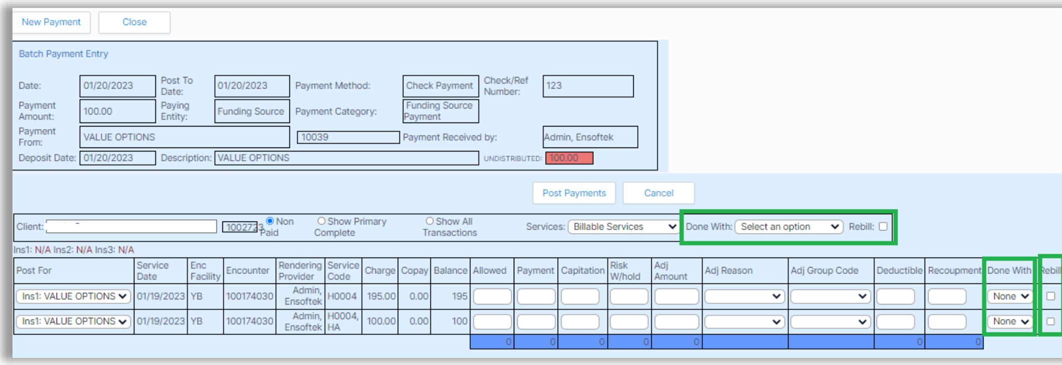
Rebill - When the payment/adjustment from the primary insurance is received and if the client is expecting more/a different response, then the claim can be marked to rebill and available to generate and submit claims. The same rule applies to secondary and tertiary insurance.

NOTE**: Needs "Next Level billing" is now renamed to **"Rebill".

On the Invoice Manager Page



At the Payment Allocation Screen

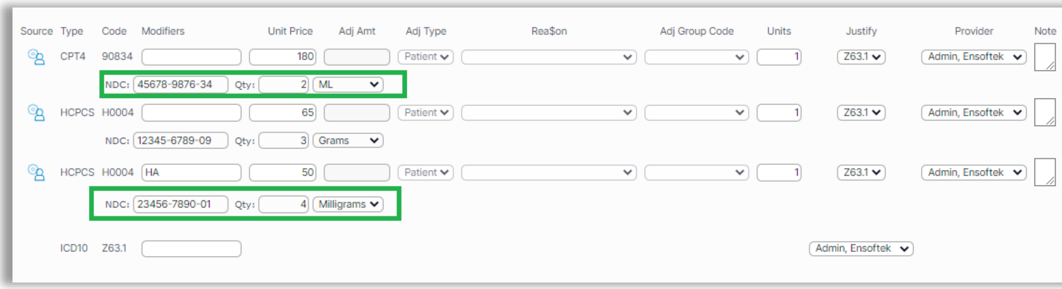


Option to include NDC code related to CPT4 codes in the Fee Sheet

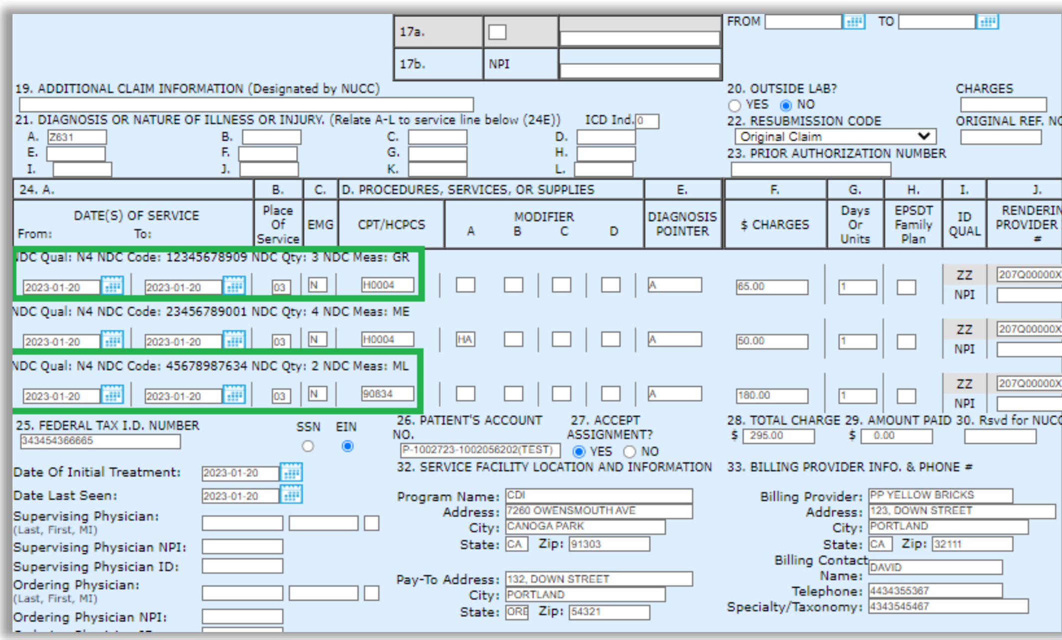
Core **Setup**

Authorized users can now include National Drug Code (NDC) information related to CPT4 codes in the Fee Sheet.

Fee Sheet



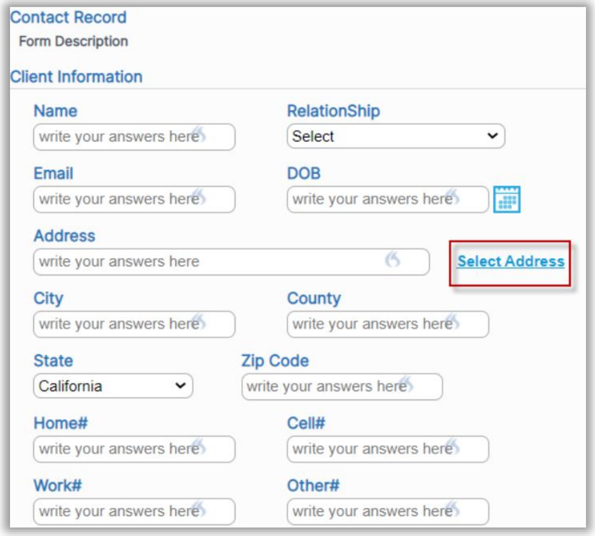
HCFA Claim Form



New Other Contacts Field Type available in Form Builder

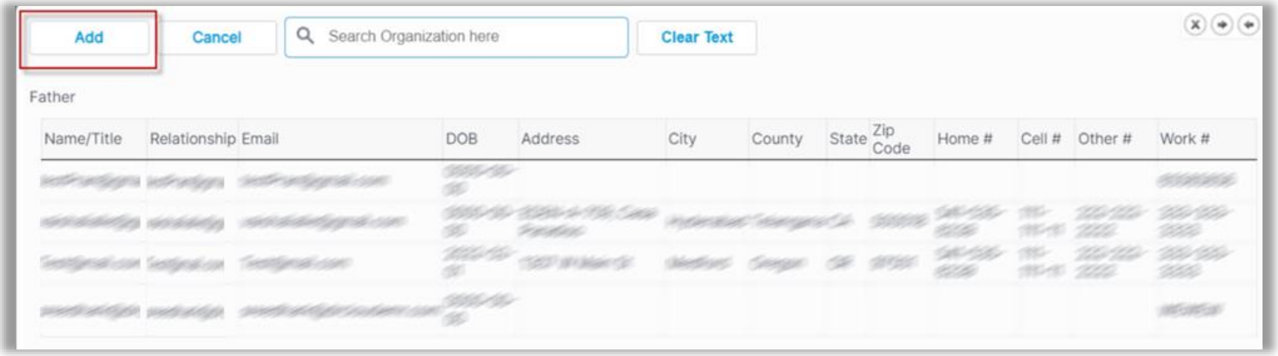
Core

A new field type **"Other Contacts"** is now available in the Form Builder fields list for authorized users who build forms. When these users add this field type to any form, the form will display a section with the following fields.



Users can click on the **"Select Address"** link to populate the address from the DrCloudEHR address book.

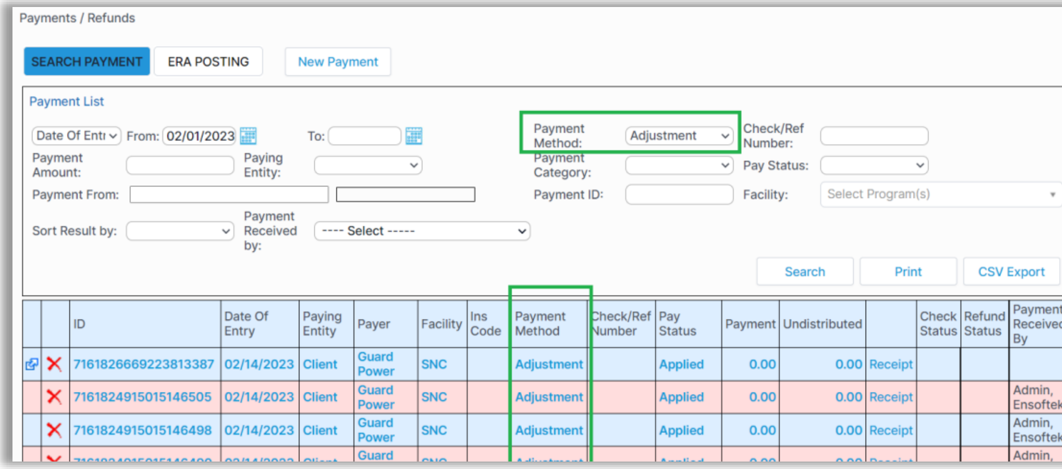
NOTE: *Users can also add new contacts by clicking on the "Add" button.*



Write-offs are now an Adjustment

☑ **Core**

Authorized users can now perform write-offs using the **"Adjustment"** payment method in the payment screen.

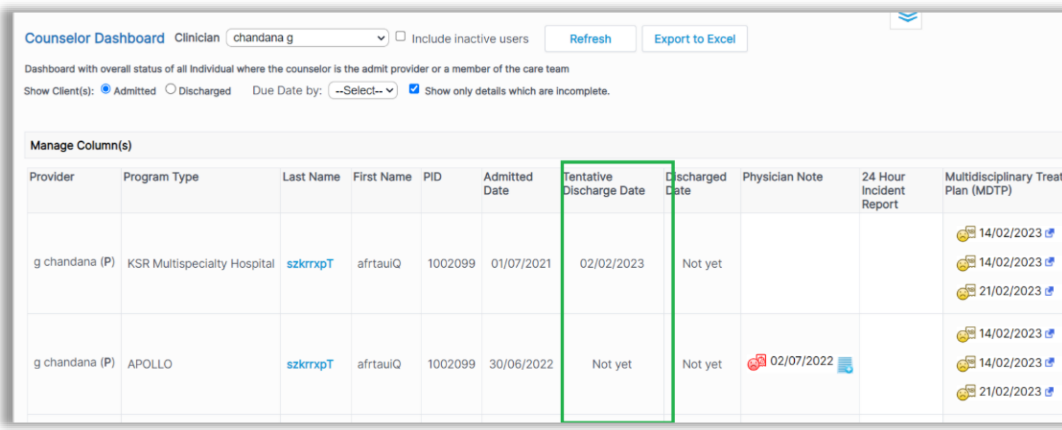


Counselor Dashboard

New Column Tentative Discharge Date added to Counselor Dashboard

☑ **Core**

Added the **"Tentative Discharge date"** column that can be hidden or shown through manage columns.



ROI Dashboard

Ability to reorder ROI Dashboard headers

Core

Authorized users can reorder the headers in the **"ROI dashboard"** by clicking on the header name.

NOTE: *A new column has been added to display the Facility name.*

* Records in red are revoked ROI's * Records in Green are Signed ROI's

Client ROI

	Facility	Organization	Name/Title	Date	Identity, dates, diagnoses, prognoses, recommendations, treatment rendered, assessments, locations, progress notes, treatment status, dialogue with recipient, treatment summary and treatment coordination.	Mental Health Treatment, to include Psychiatric/Medication History (past and present)	Medical Services, to include Medication History and Prior Hospitalizations (past and present)	Family (past and present)	Employment (past and present)
	Save Nature Clinic	RAJ	SREEDHAR Mike	10/13/2022	Yes	Yes	Yes	Yes	Yes
	Save Nature Clinic	Remo	Remo Remo	10/13/2022	Yes	Yes	Yes	Yes	Yes
	Save Nature Clinic	Remo	Remo Remo	10/13/2022	Yes	Yes	Yes	Yes	Yes

Various updates to the ROI Dashboard

Core

- New column "Expiration Date" to display the expiration date for an ROI.
- Expired ROIs are displayed in red based on the Expiration Date.

NOTE: *For all existing forms, this date will be the form creation date + Client ROI form expiry (in months).*

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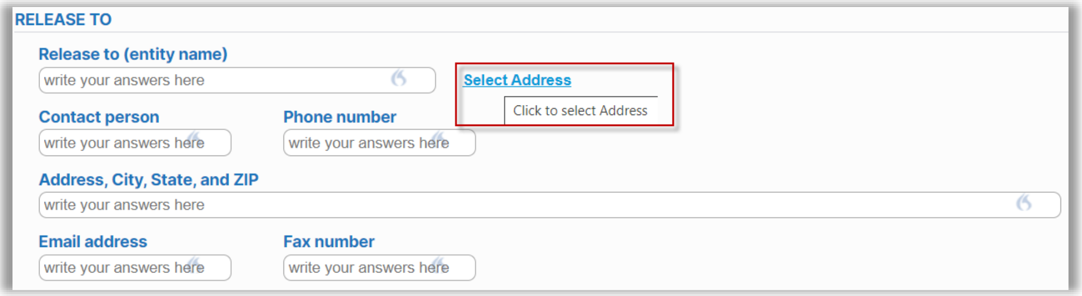
ROI Form Builder

Added Address Book option to ROI Form Builder

☑ **Core**

In the ROI Form Builder, renamed the organization link to **"Select Address"**. Clicking on the select address link will find the list of addresses from both the organization and address book.



ACL to hide the Add button on the Address Book

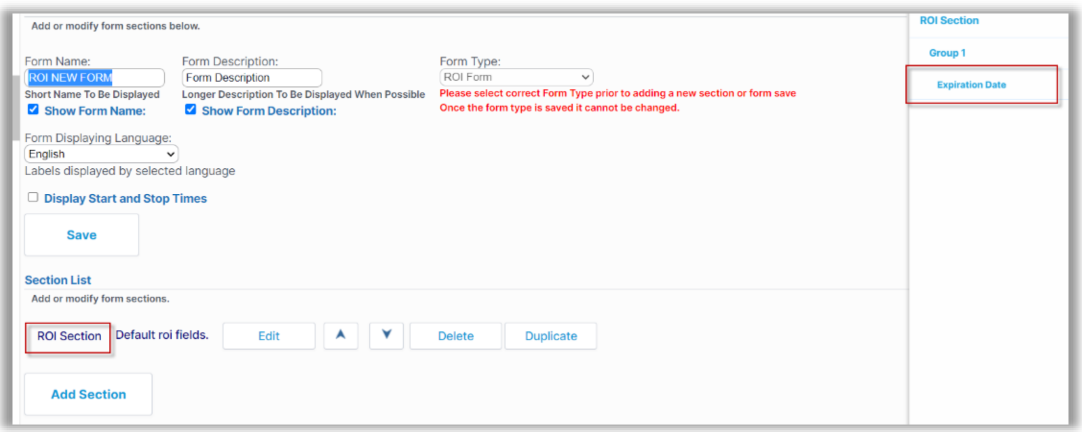
☑ **Core**

Now administrators can remove access to adding a new entry in the Address Book by including the new ACL **"Restrict user from adding new address at Address Selection page"** for the target user.

Added ROI Expiration date field to the ROI Form Builder field type

☑ **Core**

When an ROI-type form is designed using the Form Builder, a section with the name **"ROI Section"** is added to the form and the system includes the ROI **"Expiration Date"** field to that form automatically.



NOTE:

- *While adding the ROI form under an encounter the system will default the **"Expiration Date"** field on the ROI dashboard with the date derived based on the form creation date + the number of days configured at the facility setting **"Client ROI form expiry (in months)"** "*
- *Staff can change the **"Expiration Date"** on the form.*