



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:



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.

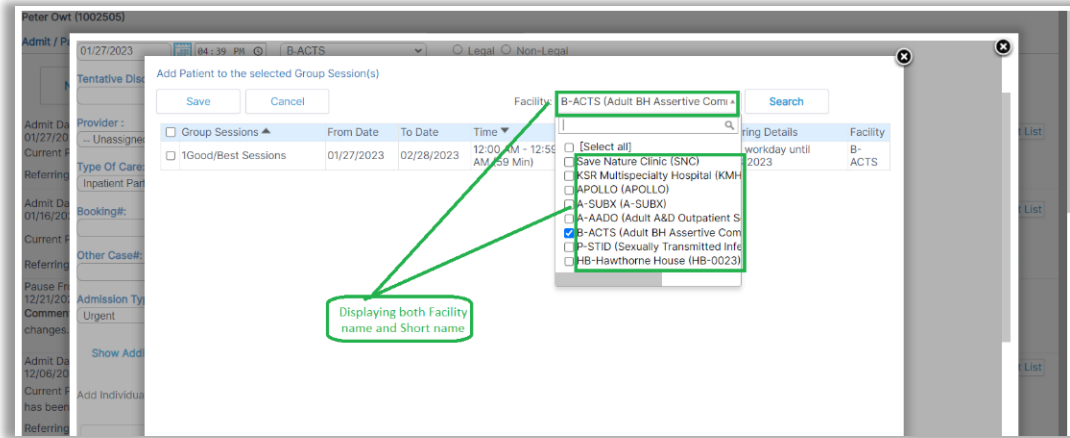
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Patients

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

Core

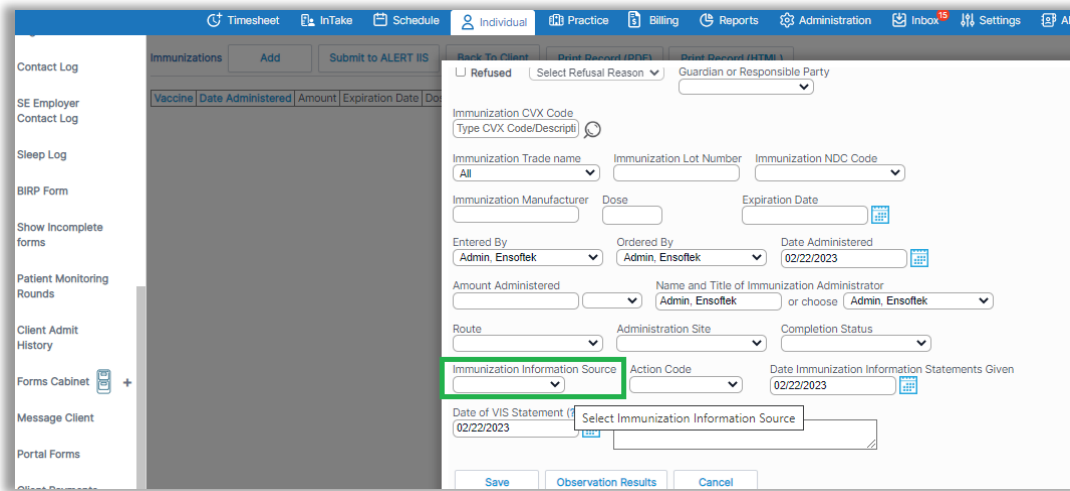
Now users can pick the appropriate facility from the list of facilities when adding clients to group sessions using the facility's "Short Name".



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

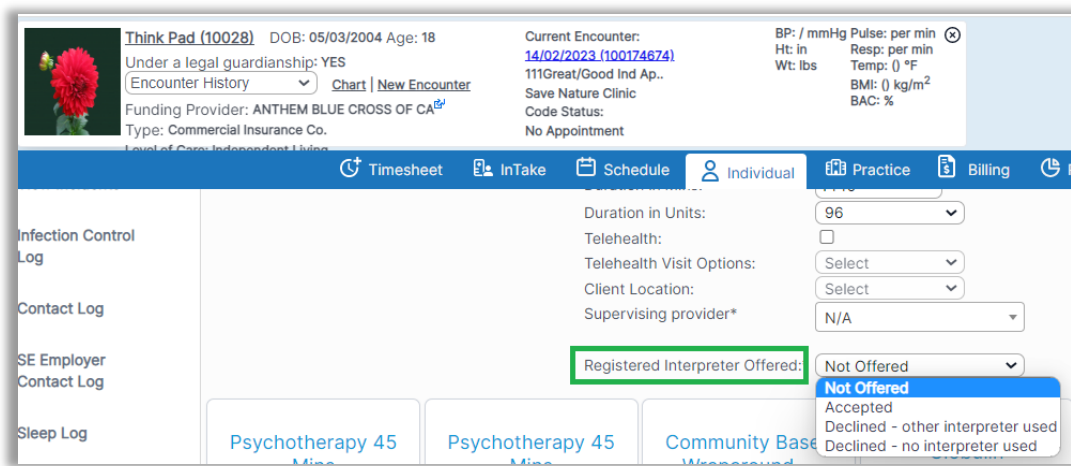
Core Setup

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.



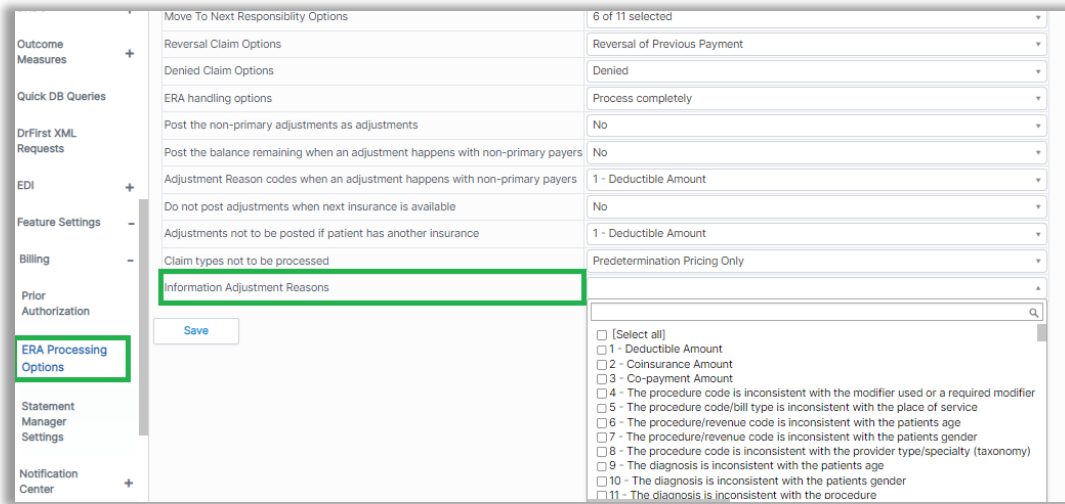
NOTE: On the New Encounter Form, "Not Offered" is the default.

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.

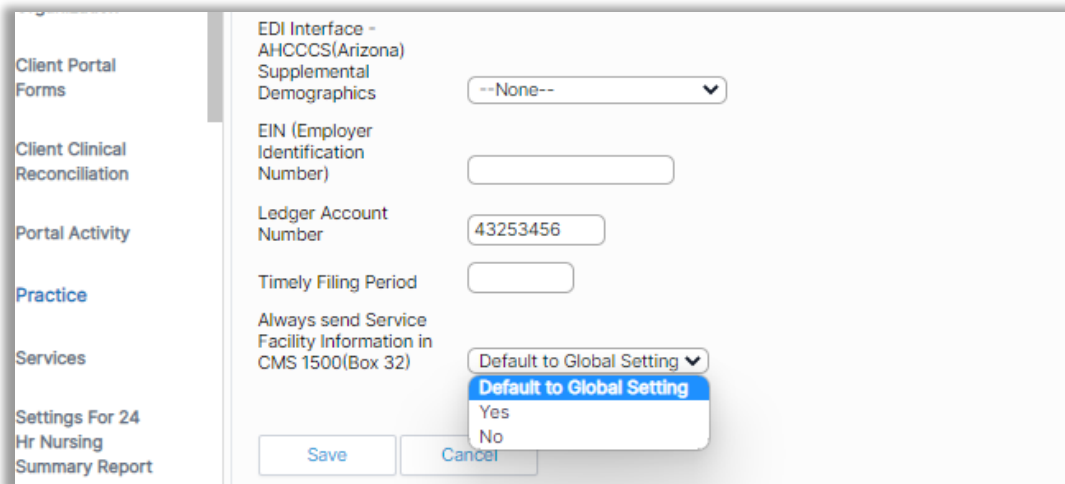


Updates to Service Facility NPI in CMS 1500 (Box 32)

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.

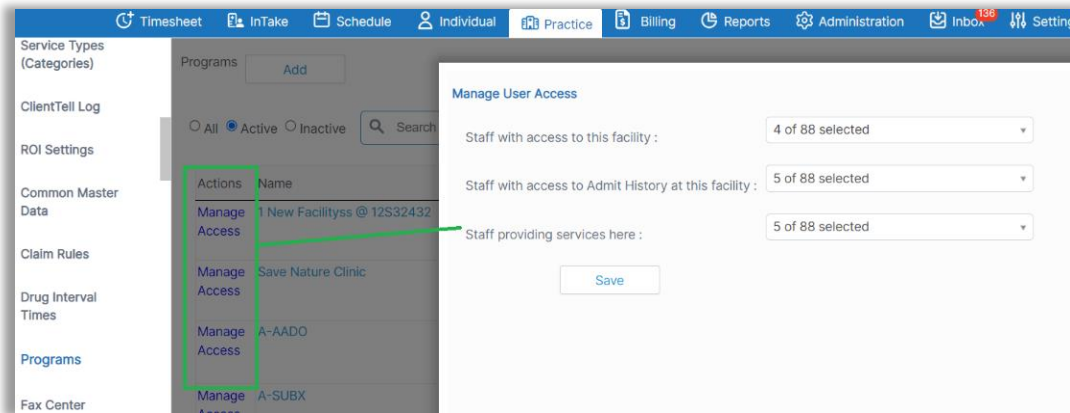
<input type="checkbox"/>	Name	Add Reports	Description	Order	Show at Custom Reports	Delete
<input type="checkbox"/>	3Third Category	Reports (3)	Mera's Category	10	Yes	
<input type="checkbox"/>	4-Category	Reports (2)	My Own Category...	2	Yes	
<input type="checkbox"/>	First Category	Reports (4)		0	Yes	
<input type="checkbox"/>	GREAT Category	Reports (4)	GREAT Category	1	Yes	
<input type="checkbox"/>	Second Category	Reports (4)	First Category @ 123'ss	0	Yes	
<input type="checkbox"/>	Super Category	Reports (2)	Super Category	4	Yes	
<input type="checkbox"/>	Variety Category @ 123's	Reports (3)	Variety Category @ 123's	22	Yes	

<input type="checkbox"/>	Report Name	Description	Accessible To	Category	Created On	Created By	Last Modified On	Last Modified By
<input type="checkbox"/>	Billing (FeeSheets) upto 100	Billing (FeeSheets) upto 100	Accounting, Admit Discharge, Analytical Reports Admin, Clinic Admin, Clinicians, EnSoftek Administrators, Front Office	First Category,5th Category,Sixth Category,Second Category,GREAT Category,3Third Category,4-Category,Super Category,Ninth Category	3/02/2023	Ensoftek Admin		
<input type="checkbox"/>	Encounters List Upto last 100	Encounters List Upto last 100	Clinic Admin, EnSoftek Administrators	First Category,5th Category,GREAT Category	3/02/2023	Ensoftek Admin		
<input type="checkbox"/>	Facilities List	Facilities List	Analytical Reports Admin, Clinic Admin, EnSoftek Administrators	First Category,5th Category,GREAT Category	3/02/2023	Ensoftek Admin		
<input type="checkbox"/>	Users List	Users List	EnSoftek Administrators	Second Category,5th Category,GREAT Category	06/02/2023	Ensoftek Admin		
<input type="checkbox"/>	OK		EnSoftek	3Third Category,Super	9/11/2022	Ensoftek		

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

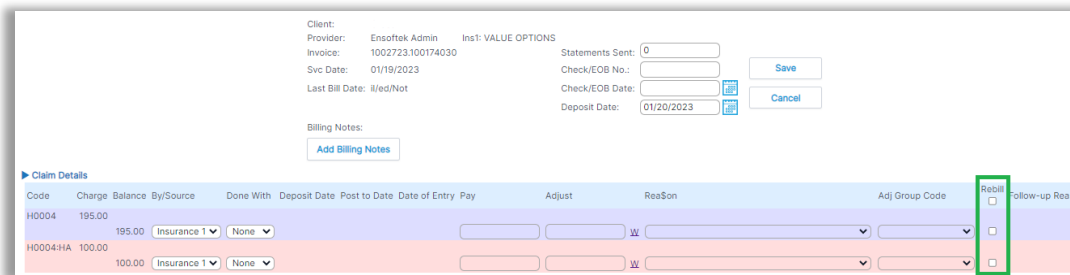
Core

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

Batch Payment Entry

Date: 01/20/2023 Post To Date: 01/20/2023 Payment Method: Check Payment Check/Ref Number: 123

Payment Amount: 100.00 Paying Entity: Funding Source Payment Category: Funding Source Payment

Payment From: VALUE OPTIONS I0039 Payment Received by: Admin, Ensoftek

Deposit Date: 01/20/2023 Description: VALUE OPTIONS UNOISTRIBUTED: 00000

Client: 100227 Paid Non Show Primary Show All Transactions Services: Billable Services Done With: Select an option Rebill:

Post For	Service Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copy	Balance	Allowed	Payment	Capitation	Risk W/hold	Adj Amount	Adj Reason	Adj Group Code	Deductible	Recoupment	Done With	Rebill
Ins1: VALUE OPTIONS	01/19/2023	YB	100174030	Admin, Ensoftek	H0004	195.00	0.00	195										None	<input type="checkbox"/>
Ins1: VALUE OPTIONS	01/19/2023	YB	100174030	Admin, H0004, Ensoftek, HA	H0004	100.00	0.00	100										None	<input type="checkbox"/>

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



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

Fee Sheet

Source Type	Code	Modifiers	Unit Price	Adj Amt	Adj Type	Reason	Adj Group Code	Units	Justify	Provider	Note
CPT4	90834		180		Patient			1	263.1	Admin, Ensoftek	
		NDC: 45678-9876-34						2 (ML)			
HCPCS	H0004		65		Patient			1	263.1	Admin, Ensoftek	
		NDC: 12345-6789-09						3 (Grams)			
HCPCS	H0004	HA	50		Patient			1	263.1	Admin, Ensoftek	
		NDC: 23456-7890-01						4 (Milligrams)			
ICD10	Z63.1									Admin, Ensoftek	

HCFA Claim Form

17a. FROM TO

17b. NPI

19. ADDITIONAL CLAIM INFORMATION (Designated by NUCC)

20. OUTSIDE LAB? CHARGES

21. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. (Relate A-L to service line below (24E)) ICD Ind. 0

22. RESUBMISSION CODE ORIGINAL REF. NO

23. PRIOR AUTHORIZATION NUMBER

24. A.	B.	C.	D.	E.	F.	G.	H.	I.	J.	
DATE(S) OF SERVICE	Place Of Service	EMG	CPT/HCPCS	MODIFIER	DIAGNOSIS POINTER	\$ CHARGES	Days Or Units	EPSDT Family Plan	ID QUAL	RENDERING PROVIDER #
From: 2023-01-20 To: 2023-01-20		03	N H0004		A	65.00	1		ZZ	207Q00000X
NDC Qual: N4 NDC Code: 12345678909 NDC Qty: 3 NDC Meas: GR										
From: 2023-01-20 To: 2023-01-20		03	N H0004	HA	A	50.00	1		ZZ	207Q00000X
NDC Qual: N4 NDC Code: 23456789001 NDC Qty: 4 NDC Meas: ME										
From: 2023-01-20 To: 2023-01-20		03	N 90834		A	180.00	1		ZZ	207Q00000X
NDC Qual: N4 NDC Code: 45678987634 NDC Qty: 2 NDC Meas: ML										

25. FEDERAL TAX I.D. NUMBER SSN EIN

26. PATIENT'S ACCOUNT NO. 27. ACCEPT ASSIGNMENT?

28. TOTAL CHARGE 29. AMOUNT PAID 30. Rsvd for NUCC

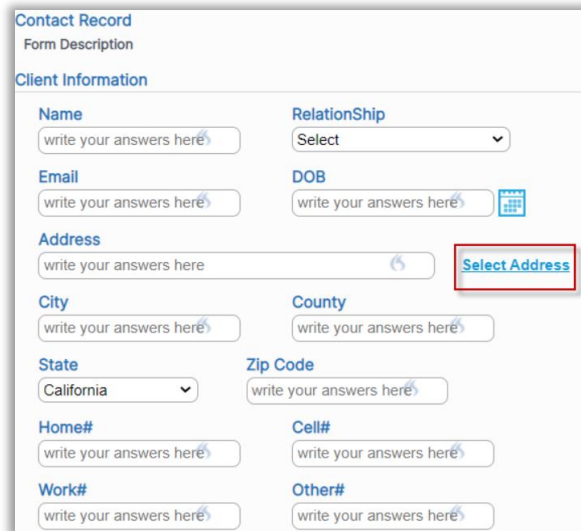
31. SERVICE FACILITY LOCATION AND INFORMATION 32. BILLING PROVIDER INFO. & PHONE #

33. BILLING PROVIDER INFO. & PHONE #

New Other Contacts Field Type available in Form Builder

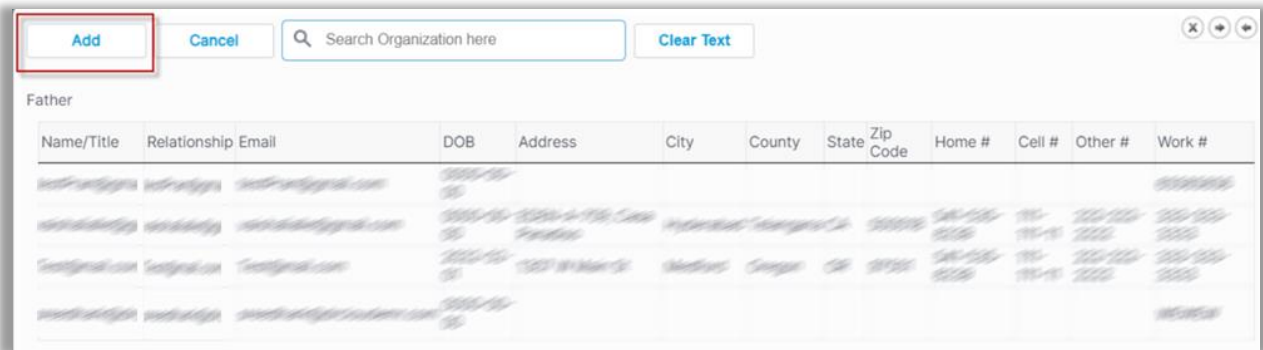
 Core

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.



Name/Title	Relationship	Email	DOB	Address	City	County	State	Zip Code	Home #	Cell #	Other #	Work #
test@rediffmail.com	test@rediffmail.com	test@rediffmail.com	0000-00-00									00000000
test@rediffmail.com	test@rediffmail.com	test@rediffmail.com	0000-00-00	1234 N 1234th Street	Hyderabad	Andhra Pradesh	India	500000	00-000-0000	00-00-0000	000-000-0000	000-000-0000
test@gmail.com	test@gmail.com	test@gmail.com	0000-00-00	1234 N Main St	Medford	Oregon	OR	97501	00-000-0000	00-00-0000	000-000-0000	000-000-0000
test@rediffmail.com	test@rediffmail.com	test@rediffmail.com	0000-00-00									000000

Write-offs are now an Adjustment



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

Payments / Refunds

SEARCH PAYMENT ERA POSTING New Payment

Payment List

Date Of Entry From: 02/01/2023 To:

Payment Method: **Adjustment** Check/Ref Number:

Payment Amount: Paying Entity:

Payment Category: Pay Status:

Payment From: Payment ID: Facility:

Sort Result by: Payment Received by:

Search Print CSV Export

ID	Date Of Entry	Paying Entity	Payer	Facility	Ins Code	Payment Method	Check/Ref Number	Pay Status	Payment	Undistributed	Check Status	Refund Status	Payment Received By
7161826669223813387	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		Admin, Ensoftek
7161824915015146505	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		Admin, Ensoftek
7161824915015146498	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		Admin, Ensoftek

Counselor Dashboard

New Column Tentative Discharge Date added to Counselor Dashboard



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

Counselor Dashboard Clinician: chandana.g Include inactive users Refresh Export to Excel

Dashboard with overall status of all Individual where the counselor is the admit provider or a member of the care team

Show Client(s): Admitted Discharged Due Date by: --Select-- Show only details which are incomplete.

Manage Column(s)

Provider	Program Type	Last Name	First Name	PID	Admitted Date	Tentative Discharge Date	Discharged Date	Physician Note	24 Hour Incident Report	Multidisciplinary Treat Plan (MDTP)
g chandana (P)	KSR Multispecialty Hospital	szkrxpT	afrtaiQ	1002099	01/07/2021	02/02/2023	Not yet			<ul style="list-style-type: none"> 14/02/2023 14/02/2023 21/02/2023
g chandana (P)	APOLLO	szkrxpT	afrtaiQ	1002099	30/06/2022	Not yet	Not yet	02/07/2022		<ul style="list-style-type: none"> 14/02/2023 14/02/2023 21/02/2023

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
Save Nature Clinic	Remo	Remo Remo	10/13/2022	Yes	Yes	Yes	Yes
Save Nature Clinic	Remo	Remo Remo	10/13/2022	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).

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.

The screenshot shows the 'RELEASE TO' section of the ROI Form Builder. It contains several input fields: 'Release to (entity name)', 'Contact person', 'Address, City, State, and ZIP', 'Email address', 'Phone number', and 'Fax number'. A red box highlights the 'Select Address' link, which is located next to the 'Release to (entity name)' field. Below the link, there is a small button that says 'Click to select Address'.

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.

The screenshot shows the configuration page for the ROI Form Builder. It includes fields for 'Form Name', 'Form Description', 'Form Type', 'Short Name To Be Displayed', 'Longer Description To Be Displayed When Possible', 'Form Displaying Language', and 'Display Start and Stop Times'. A red box highlights the 'ROI Section' field type in the 'Section List' section. The 'ROI Section' field type is listed as 'Default roi fields.' and has buttons for 'Edit', 'Delete', and 'Duplicate'. A red box also highlights the 'Expiration Date' field in the 'ROI Section' preview on the right side of the page.

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.