

DrCloudEHR™ March Release Notes

Release to Staging Site – February 26, 2023 Release to Production Site – March 05, 2023

Table of Contents

Patients
Added Short Name to the facility drop-down list in the admit /pause/ discharge screen4
Immunization Registry - RXA-9 Field now updated to include an indicator for a new or historical immunization record4
Option to hide the Check-Out Date field on the New Encounter Form
Ability to record interpreter information for appointments5
Practice
ERA Processing Options – Adjustment reasons for information only6
Updates to Service Facility NPI in CMS 1500 (Box 32)6
Option to categorize and organize Custom Reports in the Left Menu7
Ability to manage user access to admit history, facility, and service facilities in one interface8
Billing
Ability to indicate when to bill remaining balance to next level payer at payment allocation screen8
Option to include NDC code related to CPT4 codes in the Fee Sheet9
New Other Contacts Field Type available in Form Builder10
Write-offs are now an Adjustment11
Counselor Dashboard
New Column Tentative Discharge Date added to Counselor Dashboard
ROI Dashboard12
Ability to reorder ROI Dashboard headers12
Various updates to the ROI Dashboard12
ROI Form Builder
Added Address Book option to ROI Form Builder13
ACL to hide the Add button on the Address Book13
Added ROI Expiration date field to the ROI Form Builder field type13



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



Some setup is required after the release



Dependent on the activation of other feature(s)



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.

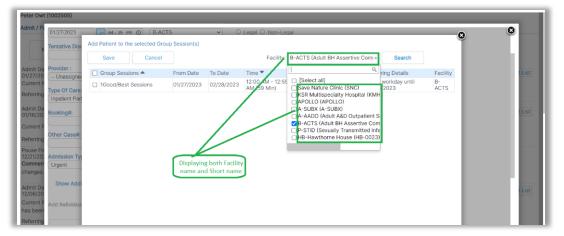
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at <u>support@drcloudemr.com</u>.

Patients

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

Core

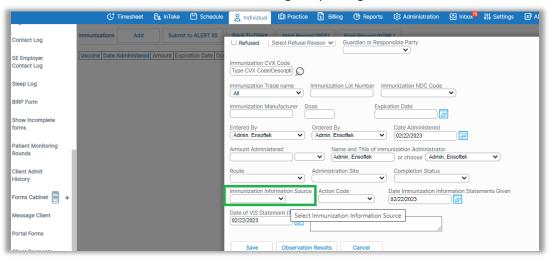
Now users can pick the appropriate facility from the list of facilities when adding clients to group sessions using the facility's **"Short Name".**



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.

Under a le Encounter Funding Pr Type: Com	(10028) DOB: 05/03/2004 Age: gal guardianship: YES History V Chart New En rovider: ANTHEM BLUE CROSS OF C mercial Insurance Co.	14/0 111G Incounter Save	ent Encounter: 2/2023 (100174674) reat/Good Ind Ap Nature Clinic e Status: ppointment	BP: / Ht: in Wt: It		nin		
	C Timesh	eet 🖳 InTake	🗄 Schedule	2 Individual	Practice	5	Billing	٦ ٩
Infection Control Log Contact Log			Duration in Un Telehealth: Telehealth Vis Client Location Supervising pr	it Options: n:	96 Select N/A	> > >	Ţ	
SE Employer Contact Log			Registered Int	erpreter Offered:	Not Offered Not Offered Accepted	hor into	~)	
Sleep Log	Psychotherapy 45	Psychother		ommunity Bas	Se Declined - no interpreter used			

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.

	1	Move To Next Responsibility Options	6 of 11 selected v
Outcome	+	Reversal Claim Options	Reversal of Previous Payment *
Measures		Denied Claim Options	Denied *
Quick DB Queries		ERA handling options	Process completely *
DrFirst XML		Post the non-primary adjustments as adjustments	No *
Requests		Post the balance remaining when an adjustment happens with non-primary payers	No *
EDI	+	Adjustment Reason codes when an adjustment happens with non-primary payers	1 - Deductible Amount *
		Do not post adjustments when next insurance is available	No *
Feature Settings		Adjustments not to be posted if patient has another insurance	1 - Deductible Amount *
Billing	-	Claim types not to be processed	Predetermination Pricing Only *
Prior		Information Adjustment Reasons	
Authorization			٩
ERA Processing	n II.	Save	[Select all] 1 - Deductible Amount
Options	Ш		2 - Coinsurance Amount 3 - Co-payment Amount
	1		4 - The procedure code is inconsistent with the modifier used or a required modifier
Statement Manager	- 1		5 - The procedure code/bill type is inconsistent with the place of service 6 - The procedure/revenue code is inconsistent with the patients age
Settings			7 - The procedure/revenue code is inconsistent with the patients age
g-			8 - The procedure code is inconsistent with the provider type/specialty (taxonomy)
Notification			9 - The diagnosis is inconsistent with the patients age
Center	+		10 - The diagnosis is inconsistent with the patients gender 11 - The diagnosis is inconsistent with the procedure

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.

Client Portal Forms	EDI Interface - AHCCCS(Arizona) Supplemental Demographics	None V
Client Clinical Reconciliation	EIN (Employer Identification Number)	
Portal Activity	Ledger Account Number	43253456
Practice	Timely Filing Period	
Services	Always send Service Facility Information in CMS 1500(Box 32)	Default to Global Setting Default to Global Setting
Settings For 24 Hr Nursing Summary Report	Save	Yes No ancer

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	a category	will be l	listed und	der the	"General"	category.
	-					_				

	Ct Times	sheet	🖭 InTake	🗄 Schedule	A Indi	vidual	Practice	Billing	╚	Reports	හි Admir	nistratio
Procedures	+	Repor	t Categories									
Administrative	+	Add	New Category	/			click he	ere to update o	order	Update		
Inventory	+		Name			dd eports	Description			Order	Show at Custom Reports	Delete
Golden Thread	+		3Third Catego	ory_		eports 3)	Mera's Category			10	Yes	Û
Patient Incident	s		4-Category		R (1	eports 2)	My Own Categor	у		2	Yes	Û
Custom Reports	. –		First Category	Y_		eports 4)				0	Yes	Î
New Report	- 1		GREAT Categ	<u>ory</u>		eports 4)	GREAT Category			1	Yes	Û
New Report	- 1		Second Categ	<u>jory</u>		eports 4)	First Category @	123'ss		0	Yes	Î
Report Categories			Super Catego	<u>ry</u>	R (1	eports 2)	Super Category			4	Yes	Î
	-		Variety Categ	ory @ 123's	R	eports	Variety Category	@ 123's		22	Yes	Û

	¢	Time	sheet	🖭 InTake	🗄 Schedule 🛛 😤 Individua	al 🖪 Practice 🚺	Billing 🕒 Reports 😂	Administra	tion 🛃	Inbo ¹³⁶ I	Settin
nventory		т									
Golden Thread		+	Cust	om Reports	Add Deactivate	Show All Reports	Export Imp	ort			
Patient Incidents	s	1									
Custom Reports		-		Report Name	Description	Accessible To	Category	Created On	Created By	Last Modified On	Las Modifi By
New Report Report Categories			0	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,Second Category,GeCAT Category,GREAT Category,4- Category,Juper Category,Nuper Category,Ninth Category	13/02/2023	Ensoftek Admin		
Manage Reports			o	Encounters List Upto last 100	Encounters List Upto last 100	Clinic Admin, EnSoftek Administrators	0 11 0 1	13/02/2023	Ensoftek Admin		
Labels General		+		Facilities List	Facilities List	Analytical Reports Admin, Clinic Admin, EnSoftek Administrators	First Category,5th Category,GREAT Category	13/02/2023	Ensoftek Admin		
		+		Users List	Users List	EnSoftek Administrators	Second Category,5th Category,GREAT Category	06/02/2023	Ensoftek Admin		
MOTS		+	0	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.

C ⁺ Tir	sheet 🗈 InTake 🛱 Schedule 🙎 Individual 💼 Practice 🚯 Billing 🕒 Reports 🕸 Administration 😫 Inbo
Service Types (Categories)	Programs Add
ClientTell Log	Manage User Access
ROI Settings	O All Active O Inactive Q Search Staff with access to this facility: 4 of 88 selected
Common Master	Actions Name Staff with access to Admit History at this facility : 5 of 88 selected *
Data Claim Rules	Manage New Facilityss @ 12S32432 Access Staff providing services here : 5 of 88 selected *
Drug Interval	Manage Save Nature Clinic Save
Times	Manage A-AADO Access
Programs	
Fax Center	Manage A-SUBX

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

	Client: Provider: Ensoftek Admin Invoice: 1002723.100174030	Ins1: VALUE OPTIONS	Statements Sent:	0			
	Svc Date: 01/19/2023	(Check/EOB No.:		Save		
	Last Bill Date: il/ed/Not	0	Check/EOB Date:		Cancel		
		1	Deposit Date:	01/20/2023	Cancel		
	Billing Notes:						
Claim Details	Add Billing Notes						
	osit Date Post to Date Date of Entry I	Pay Adju	ıst	Rea\$on		Adj Group Code	Rebill Follow-up Re
H0004 195.00 Insurance 1 V None V			w			•	
H0004:HA 100.00 Insurance 1 V None V	(w			•	



At the Payment Allocation Screen

New Payment	New Payment Close																			
Batch Payment En	Batch Payment Entry																			
Date: 01/	/20/2023	Post T Date:		1/20/2023	Payme	nt Metho	d:	Check	< Paymen	t Check		3								
Amount:	0.00	Paying Entity:		unding Sour	ce Payme	nt Catego	ory:	Fundi Payme	ng Source int	9										
Payment VA From:	LUE OPTIC				1003	Э		Payme	nt Receiv	ed by:	Adı	min, Ensofte	k							
Deposit Date: 01/	Peposit Date: 01/20/2023 Description: VALUE OPTIONS Liveis resurce 100200																			
											Pos	t Payments	c	ancel						
Client:				1002723	Non C	Show Pr	imary		Show Al ansaction		Service	s: Billable	Services	✓ Dor	e With: Select an o	pption V Rebill				
Ins1: N/A Ins2: N/A	ins3: N/A			*																_
Post For		Service Date	Enc Facility	Encounter		Service Code	Charge	Copay	Balance	Allowed	Payment	Capitation	Risk W/hold	Adj Amount	Adj Reason	Adj Group Code	Deductible	Recoupment	Done With	Rebill
Ins1: VALUE OPTI		01/19/2023	YB	100174030	Admin, Ensoftek	H0004	195.00	0.00	195						~	~			None 🗸	
Ins1: VALUE OPTI		01/19/2023	YB	100174030	Admin, Ensoftek		100.00	0.00	100						~	~			None 🗸	
										0	0	0	0	0			0	0		

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

I	Source	Туре	Code Modifiers	Unit	Price Adj Amt	Adj Type	Rea\$on	Adj Group Code	Units	Justify	Provider	Note
l	്പ	CPT4	90834		180	Patient 🗸	~	~	1	Z63.1 🗸	Admin, Ensoftek	•
l			NDC: 45678-9876-34	Qty:	2 ML 🗸							
l	୍ର	HCPCS	H0004		65	Patient 🗸	· · · · · · · · · · · · · · · · · · ·	~	1	Z63.1 🗸	Admin, Ensoftek	∍่
l			NDC: 12345-6789-09	Qty:	3 Grams 🗸							
l	്പ	HCPCS	H0004 (HA		50	Patient 🗸		~	1	Z63.1 🗸	Admin, Ensoftek	•
l		[NDC: 23456-7890-01	Qty:	4 Milligrams 🗸]						
l		ICD10	Z63.1			-				Admin, Ensoftek 🗸		

HCFA Claim Form

		17a.			FROM	T III	0	đ	•
19. ADDITIONAL CLAIM INFORMATION			NPI		20. OUTSIDE LAP			CHAR	
21. DIAGNOSIS OR NATURE OF ILLNE A. 2631 B. E. F. F. I. J.		C G K	e below (24E)) ICD Ind. D H L	0	22. RESUBMISSI Original Claim 23. PRIOR AUTH				INAL REF. NO
24. A.	B. C.	D. PROCEDURES, SERV	/ICES, OR SUPPLIES	E,	E.	G.	н.	Ι.	J.
DATE(S) OF SERVICE From: To:	Place Of EMG Service	CPT/HCPCS A	MODIFIER B C D	DIAGNOSIS POINTER	\$ CHARGES	Days Or Units	EPSDT Family Plan	ID QUAL	RENDERIN PROVIDER I #
DC Qual: N4 NDC Code: 1234567890	9 NDC Qty: 3 ND	C Meas: GR		A	65.00	1		ZZ NPI	207Q00000X
NDC Qual: N4 NDC Code: 2345678900	1 NDC Otv: 4 ND	C Meas: ME		1			_	INPI	
2023-01-20	03 N	H0004 HA		A	50.00	1		ZZ NPI	207Q00000X
NDC Qual: N4 NDC Code: 4567898763		00834		A	180.00	1		ZZ	207Q00000X
25. FEDERAL TAX I.D. NUMBER 343454366665	SSN E	IN 26. PATIENT'S NO.	ACCOUNT 27. ACCEP ASSIGNMEN 2056202(TEST) • YES	NT?	28. TOTAL CHAR \$ 295.00	GE 29. AM \$			svd for NUCC
Date Of Initial Treatment: 2023-01	-20	32. SERVICE	FACILITY LOCATION AND I	NFORMATION	33. BILLING PRO	VIDER IN	FO. & PHO	NE #	
Date Last Seen: 2023-0 Supervising Physician:	-20	Program Na Addro	ess: 7260 OWENSMOUTH AVE		Billing Pro Ado	dress: 12	3, DOWN ST	RICKS	
(Last, First, MI)			CANOGA PARK			City: PO	RTLAND		
Supervising Physician NPI:		St	ate: CA Zip: 91303		Billing C	ontaction	2ip: [3]	2111	-
Supervising Physician ID: Ordering Physician: (Last, First, MI)		c	Billing Contact DAVTO Address: Billing Contact DAVTO City: PORTLAND Telephone: 4434355367 City: PORTLAND Specialty/Taxonomy: 4434355467						
Ordering Physician NPI:		St	ate: ORE Zip: 54321						



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.

ntact Record	
orm Description	
ent Information	
Name	RelationShip
write your answers here	Select ~
Email	DOB
write your answers here	write your answers here
Address	
write your answers here	6 Select Address
City	County
write your answers here	write your answers here
State	Zip Code
California 🗸	write your answers here
Home#	Cell#
write your answers here	write your answers here
Work#	Other#
write your answers here	write your answers here

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.

Add	Cance	Q Search Organiza	tion here		Clear Text							**
ather	-											
Name/Title	Relationship	Email	DOB	Address	City	County	State	Zip Code	Home #	Cell #	Other #	Work #
iet#un§igna	ief-seligen	setFungignal.com	0555-55- 060									essesses
49.666.69	nessisterja	16136659gral.com	9886-98- 98	3331-4-739, Sasa Paradas	Appendix	Serges	ciê.	30008	945-535- 5338	111- 111-11	200-220- 2220	385-985- 3885
leetgest.com	Sections	Tenginal-con	2000-00- 00	(327) #18air(32	define	Gregor	æ	19736	545-535- 6338	195-10 195-10	220-220- 2220	389-589- 3888
web el Geo	methodala	webselerister st	10-220									10500500



Write-offs are now an Adjustment

Core

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

Num		ect Progran	v n(s)		Ŧ
✓ Num✓ Pay	nber: Status: ility:Sele	ect Progran			¥
	ility: Sele	ect Progran			
Facil		ect Progran	n(s)		,
	Search	Pri	nt	CSV	Export
Paymer	nt Undistribute	ed		Refund Status	Payme Receiv By
d 0.0	0.0 0.0	00 Receipt	t		
d 0.0	0.0	00 Receipt	t		Admin, Ensoft
d 0.0	0.0	00 Receipt	t		Admin, Ensoft
e	ed 0.(ed 0.00 0.0	s -	ed 0.00 0.00 Receipt	s - Status status ed 0.00 0.00 Receipt ed 0.00 0.00 Receipt

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.

Dashboard with over	hboard Clinician chandan all status of all Individual where th dmitted O Discharged Due	e counselor is t	he admit provid			m	port to Excel		*	
Manage Column	(s)									
Provider	Program Type	Last Name	First Name	PID	Admitted Date		Discharged Date	Physician Note	24 Hour Incident Report	Multidisciplinary Treat Plan (MDTP)
g chandana (P)	KSR Multispecialty Hospital	szkrrxpT	afrtauiQ	1002099	01/07/2021	02/02/2023	Not yet			6 ⁵⁹ 14/02/2023 로 6 ⁵⁹ 14/02/2023 로 6 ⁵⁹ 21/02/2023 로
g chandana (P)	APOLLO	szkrrxpT	afrtauiQ	1002099	30/06/2022	Not yet	Not yet	o2/07/2022 🗾		State 14/02/2023 € State 14/02/2023 € State 14/02/2023 €

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.

* Records in red are revoked ROI's * Records in Green are Signed ROI's Client ROI Identity, dates diagnoses, prognoses recommendations Medical treatment Services, to rendered, Mental Health include assessments, Family Treatment, to include Psychiatric/Medication Employmen (past and Medication locations, (past History and Facility Organization Name/Title Date progress notes, present) present) History (past and Prior treatment status, Hospitalizations present) dialogue with recipient, (past and present) treatment summary and treatment coordination Save Nature RAJ SREEDHAR ۹ 📄 10/13/2022 Yes Yes Yes Yes Yes Clinic Mike Save Nature Remo Remo ۹ 📄 10/13/2022 Yes Yes Yes Yes Yes Clinic Remo Save Nature Remo Remo 10/13/2022 Yes ۹ 🚔 Yes Yes Yes Yes Clinic Remo

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

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.

Release to (entity name)		
write your answers here	6 Select Address	
Contact person	Phone number Click to select Address	
write your answers here	write your answers here	
Address, City, State, and ZIF		
write your answers here		6
Email address	Fax number	
write your answers here	write your answers here	

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.

Add or modify form sections below.	ROI Section
Form Name: Form Description: Form Type:	Group 1
Form Form ROI Form v Short Name To Be Displayed Longer Description To Be Displayed When Possible Please select correct Form Type prior to adding a new section or form save	Expiration Date
Show Form Name: Show Form Description: Once the form type is saved it cannot be changed.	
Form Displaying Language:	
English Labels displayed by selected language	
Display Start and Stop Times	
Save	
Section List	
Add or modify form sections.	
ROI Section Default roi fields. Edit Y Delete Duplicate	
Add Section	

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.