



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.

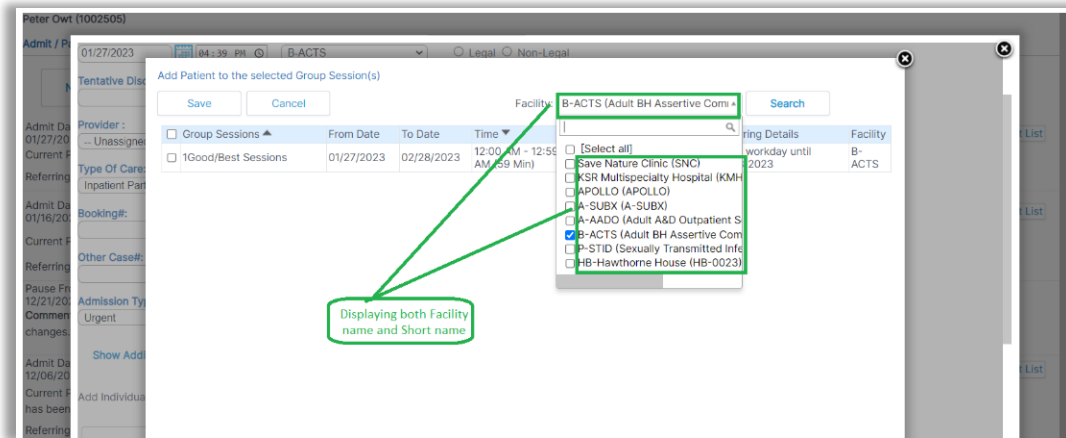
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Patients

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

Core

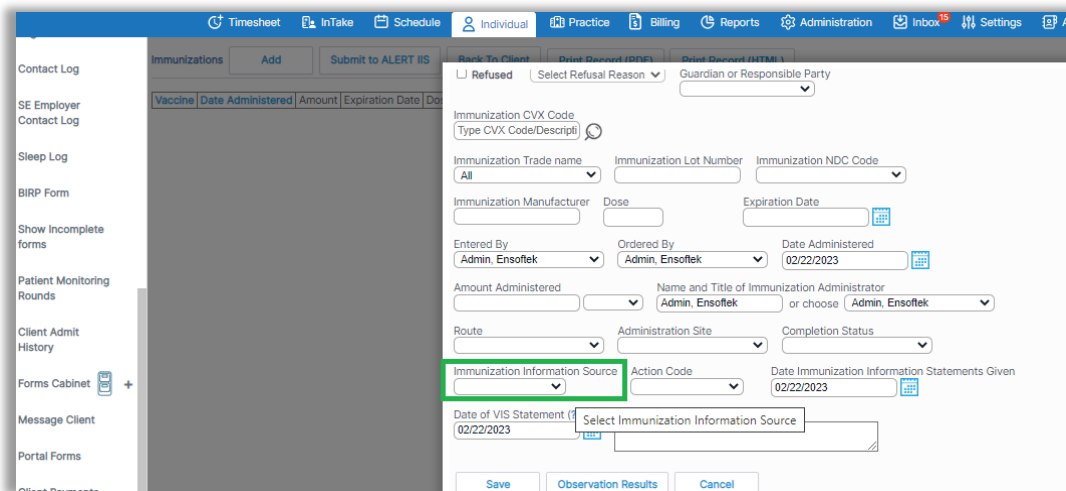
Now users can pick the appropriate facility from the list of facilities when adding clients to group sessions using the facility's **"Short Name"**.



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.

The screenshot displays the patient profile for 'Think Pad (10028)' with a red flower profile picture. The patient's DOB is 05/03/2004 and age is 18. The current encounter is dated 14/02/2023 (100174674). The interface includes a navigation bar with 'Individual' selected. On the left, there are logs for Infection Control, Contact, SE Employer, and Sleep. The main area shows appointment details with a dropdown for 'Registered Interpreter Offered' set to 'Not Offered'. A dropdown menu is open, showing options: 'Not Offered', 'Accepted', 'Declined - other interpreter used', and 'Declined - no interpreter used'. The 'Not Offered' option is highlighted in blue.

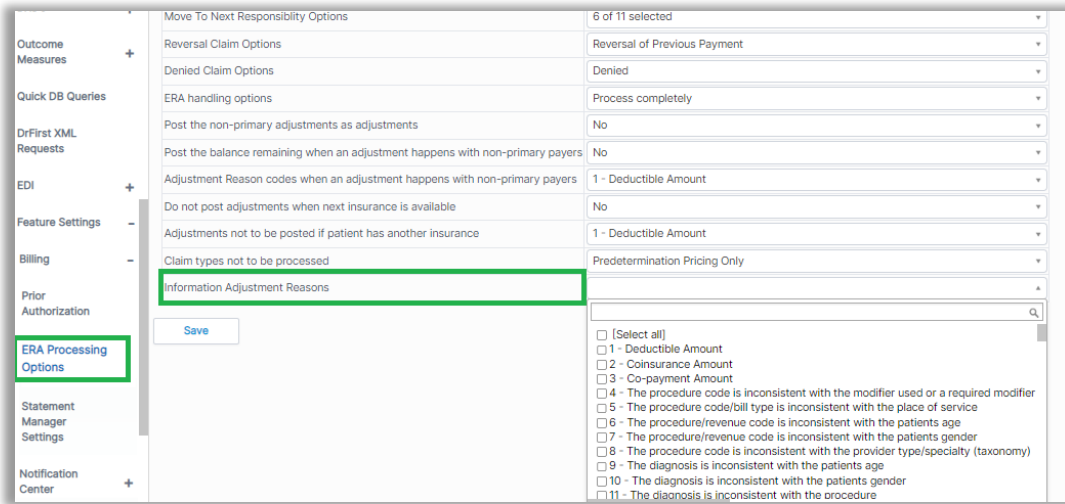
NOTE: On the New Encounter Form, "Not Offered" is the default.

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.

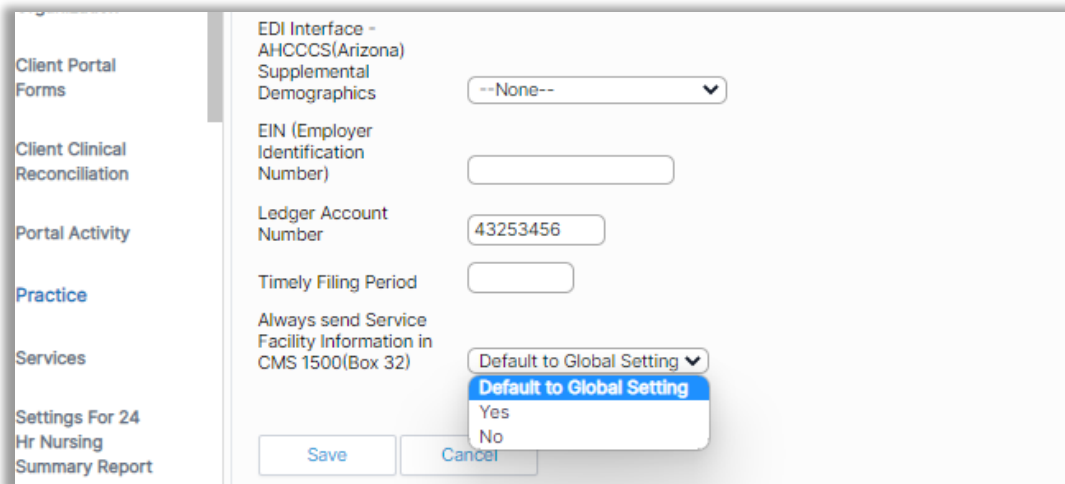


Updates to Service Facility NPI in CMS 1500 (Box 32)

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.

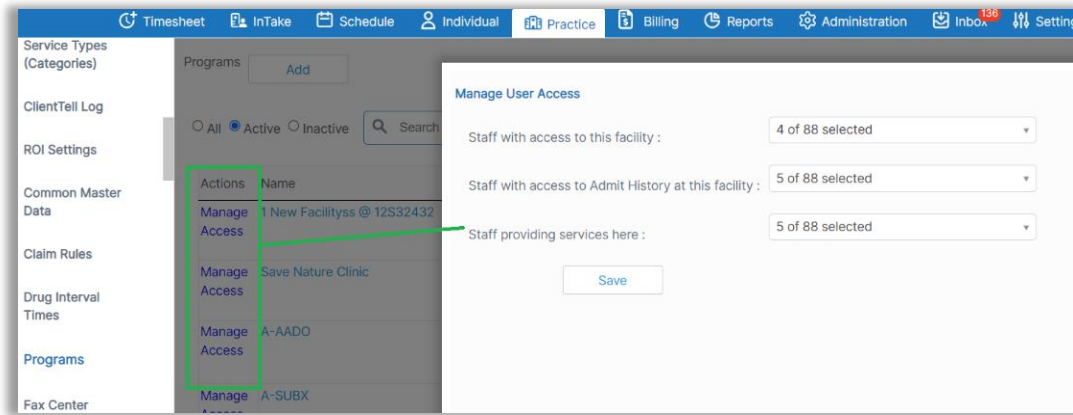
| <input type="checkbox"/> | Name | Add Reports | Description | Order | Show at Custom Reports | Delete |
|--------------------------|--|-------------|--------------------------|-------|------------------------|--------|
| <input type="checkbox"/> | 3Third Category | Reports (3) | Mera's Category | 10 | 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



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: Ensoftek Admin Inst: VALUE OPTIONS
 Invoice: 1002723.100174030
 Svc Date: 01/19/2023
 Last Bill Date: //ed/Not

Statements Sent: 0
 Check/EOB No.:
 Check/EOB Date:
 Deposit Date: 01/20/2023

Buttons: Save, Cancel

Billing Notes:
 Add Billing Notes

| Code | Charge | Balance | By/Source | Done With | Deposit Date | Post to Date | Date of Entry | Pay | Adjust | ResoN | Adj Group Code | Rebill | Follow-up Rea |
|----------|--------|---------|-------------|-----------|--------------|--------------|---------------|-----|--------|-------|----------------|--------------------------|---------------|
| H0004 | 195.00 | | Insurance 1 | None | | | | | | | | <input type="checkbox"/> | |
| H0004-HA | 100.00 | | Insurance 1 | None | | | | | | | | <input type="checkbox"/> | |

At the Payment Allocation Screen

New Payment Close

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 (10039) Payment Received by: Admin, Ensoftek
 Deposit Date: 01/20/2023 Description: VALUE OPTIONS UNDISTRIBUTED

Buttons: Post Payments, Cancel

Client: 1002723 Non Paid Show Primary Complete 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, Ensoftek | H0004-HA | 100.00 | 0.00 | 100 | | | | | | | | | | None | <input type="checkbox"/> |

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

| Source | Type | Code | Modifiers | Unit Price | Adj Amt | Adj Type | Reason | Adj Group Code | Units | Justify | Provider | Note |
|--------|-------|-------|--|------------|---------|----------|--------|----------------|-------|---------|-----------------|------|
| | CPT4 | 90834 | | 180 | | Patient | | | 1 | Z631 | Admin, Ensoftek | |
| | | | NDC: 45678-9876-34 Qty: 2 (ML) | | | | | | | | | |
| | HCPCS | H0004 | | 65 | | Patient | | | 1 | Z631 | Admin, Ensoftek | |
| | | | NDC: 12345-6789-09 Qty: 3 (Grams) | | | | | | | | | |
| | HCPCS | H0004 | HA | 50 | | Patient | | | 1 | Z631 | Admin, Ensoftek | |
| | | | NDC: 23456-7890-01 Qty: 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? YES NO | |
| 21. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. (Relate A-L to service line below (24E)) | | | | | | | | | | 22. RESUBMISSION CODE ORIGINAL REF. NO | |
| 24. A. DATE(S) OF SERVICE B. Place Of Service C. EMG D. PROCEDURES, SERVICES, OR SUPPLIES E. MODIFIER F. \$ CHARGES G. Days Or Units H. EPSDT Family Plan I. ID QUAL J. RENDERING PROVIDER # | | | | | | | | | | 23. PRIOR AUTHORIZATION NUMBER | |
| NDC Qual: N4 NDC Code: 12345678909 NDC Qty: 3 NDC Meas: GR | | | | | | | | | | ZZ 207Q00000X | |
| NDC Qual: N4 NDC Code: 23456789001 NDC Qty: 4 NDC Meas: ME | | | | | | | | | | ZZ 207Q00000X | |
| NDC Qual: N4 NDC Code: 45678987634 NDC Qty: 2 NDC Meas: ML | | | | | | | | | | ZZ 207Q00000X | |
| 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 | |
| 32. SERVICE FACILITY LOCATION AND INFORMATION | | | | | | | | | | 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.

Write-offs are now an Adjustment

Core

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.

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 Treatment Plan (MDTP) |
|----------------|-----------------------------|-----------|------------|---------|---------------|--------------------------|-----------------|----------------|-------------------------|--|
| g chandana (P) | KSR Multispecialty Hospital | szkrrxpT | afrtaiQ | 1002099 | 01/07/2021 | 02/02/2023 | Not yet | | | 14/02/2023 14/02/2023 21/02/2023 |
| g chandana (P) | APOLLO | szkrrxpT | afrtaiQ | 1002099 | 30/06/2022 | Not yet | Not yet | 02/07/2022 | | 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 'Add or modify form sections below' section of the ROI Form Builder. It contains several fields: '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' in the 'Section List' section. The 'ROI Section' is listed as 'Default roi fields.' and has buttons for 'Edit', 'Delete', and 'Duplicate'. There is also an 'Add Section' button at the bottom.

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.