

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 screen9
Option to include NDC code related to CPT4 codes in the Fee Sheet
New Other Contacts Field Type available in Form Builder11
Write-offs are now an Adjustment11
Counselor Dashboard
New Column Tentative Discharge Date added to Counselor Dashboard
ROI Dashboard13
Ability to reorder ROI Dashboard headers13
Various updates to the ROI Dashboard13
ROI Form Builder
Added Address Book option to ROI Form Builder14
ACL to hide the Add button on the Address Book14
Added ROI Expiration date field to the ROI Form Builder field type14



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.

Think Pad Under a leg Encounter Funding Pro Type: Comm	10028) DOB: 05/03/2004 Age: 18 al guardianship: YES History → Chart New Encounter ovider: ANTHEM BLUE CROSS OF CA ⁶⁹ nercial Insurance Co.	Current Encounte 14/02/2023 (1001 111Great/Good Inc Save Nature Clinic Code Status: No Appointment	r: BP:/ 74674) Ht:in 4 Ap., Wt:lb 5	mmHg Pulse: per min (Resp: per min s Temp: () °F BMI: () kg/m ² BAC: %	X	
	C Timesheet	🖭 InTake 🛱 Sch	edule 🙎 Individual	Practice	Billing	۲ 🕑
		Duratio	on in Units:	96	•	
Infection Control		Telehe	alth:			- 1
Log		Telehe	alth Visit Options:	Select	~	- 1
		Client I	_ocation:	Select	~	- 1
Contact Log		Superv	ising provider*	N/A	~	
SE Employer Contact Log		Registe	ered Interpreter Offered:	Not Offered	~	
Sleep Log	Psychotherapy 45 Psy	chotherapy 45	Community Bas	Accepted Declined - other i Declined - no inte	nterpreter rpreter use	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
FRA Processing	n II.	Save	[Select all] 1 - Deductible Amount
Options	Ш		2 - Coinsurance Amount
	1		4 - The procedure code is inconsistent with the modifier used or a required modifier
Statement	- 1		5 - The procedure code/bill type is inconsistent with the place of service
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

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 💙
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 ancel

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: Al	l existing	Custom	Reports	without a	a category	will be	listed	under	the '	'General"	category.
						_		_			

Q	ţ	Time	sheet	🖳 InTake	🗄 Schedule	음 In	dividual	Practice	Billing	٩	Reports	భ్రు Admi	nistratio
Procedures		+	Repor	rt Categories									
Administrative		+	Add	d New Category	y			click h	ere to update	order	Updat	e	
Inventory		+		Name			Add Reports	Description			Order	Show at Custom Reports	Delete
Golden Thread		+		3Third Categ	<u>ory</u>		Reports (3)	Mera's Category			10	Yes	Û
Patient Incidents				4-Category			Reports (2)	My Own Catego	гу		2	Yes	Î
Custom Reports		-		First Categor	у_		Reports (4)				0	Yes	Û
New Report				GREAT Categ	<u>lory</u>		Reports (4)	GREAT Category	,		1	Yes	Û
new report		1		Second Cate	<u>gory</u>		Reports (4)	First Category @	123'ss		0	Yes	Î
Report Categories				Super Catego	ory_		Reports (2)	Super Category			4	Yes	Î
	1			Variety Cated	ory @ 123's		Reports	Variety Category	/ @ 123's		22	Yes	î

(🕑 Time	esheet	📭 InTake	🗄 Schedule 🛛 😤 Individua	Practice	Billing 🕒 Reports හි	3 Administra	tion 🖄		🖁 Settin
Golden Thread	+	Cus	tom Reports	Add Deactivate	Show All Reports	Export Imp	port			
Patient Incidents							1	Greated	Leet	Last
Custom Reports	-		Report Name	Description	Accessible To	Category	Created On	By	Modified On	Modifie By
New Report Report Categories			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,GREAT Category,GREAT Category,3Third Category,4- Category,Super Category,Ninth Category	13/02/2023	Ensoftek Admin		
Reports		C	Encounters List Upto last 100	Encounters List Upto last 100	Clinic Admin, EnSoftek Administrators	First Category,5th Category,GREAT Category	13/02/2023	Ensoftek Admin		
Labels	+		Facilities List	Facilities List	Analytical Reports Admin, Clinic Admin, EnSoftek Administrators	First Category,5th Category,GREAT Category	13/02/2023	Ensoftek Admin		
General	+		Users List	Users List	EnSoftek Administrators	Second Category,5th Category,GREAT Category	06/02/2023	Ensoftek Admin		
MOTS	+		ОК		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 ⁺ Timesl	eet 🗈 InTake 🛱 Schedule 🙎 Individual 💼 Practice 🚦 Blilling 🕒 Reports 🕸 Administration 🖄 Inbol ¹³⁸ 🙌 Sett
Service Types (Categories)	rograms Add
ClientTell Log	Manage User Access
ROI Settings	All CAtive 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	Manage 1 New Facilityss @ 12S32432 Access Staff providing services here : 5 of 88 selected
Drug Interval	Manage Save Nature Clinic Save
Programs	Manage A-AADO Access
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 Ins1	I: VALUE OPTIONS			
		Invoice: 1002/23.1001/4030 Svc Date: 01/19/2023	Statements Sent: Check/EOR No.:	Save		
		SVC Date: 01/16/2023	check/EOB No.			
		Last Bill Date: Il/ed/Not	Check/EOB Date:	Cancel		
			Deposit Date:	01/20/2023		
		Billing Notes:				
		Add Billing Notes				
► Clair	in Details					
Code	Charge Balance By/Source Done With Depos	it Date Post to Date Date of Entry Pay	Adjust	Rea\$on	Adj Group Code	Rebill Follow-up Rea:
H000	04 195.00 195.00 Insurance 1 V None V		w		~	0
H000	100.00 Insurance 1 V None V			(• • •	0

At the Payment Allocation Screen

New Payment Close																		٦
Batch Payment Entry																		
Date: 01/20/2023 Po	st To te:	01/20/2023	Paymer	nt Metho	d:	Check	Paymen	t Check	Ref 12	3								
Payment 100.00 Pa Amount: 100.00 En	/ing iity:	Funding Source	e Paymer	nt Catego	ory:	Fundir Payme	ng Sourci int	3										
Payment From: VALUE OPTIONS			10039)		Payme	nt Receiv	red by:	Adı	min, Ensofte	ek							
Deposit Date: 01/20/2023 De	scription: \	ALUE OPTION	IS					UNDISTR	RIBUTED:	0.00								
									Pos	t Payments		Cancel						
Client:		1002723 en	lon O Co	Show Pr mplete	rimary	C Tr) Show Al ansaction	l 1S	Service	s: Billable	Services	▼ Do	ne With: Select an o	option 👻 Rebill				
Ins1: N/A Ins2: N/A Ins3: N/A																		
Post For Date	Enc Facility	Encounter F	Rendering Provider	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 OPTIONS V 01/19/20	23 YB	100174030	Admin, Ensoftek	H0004	195.00	0.00	195						~	~			None 🗸	
Ins1: VALUE OPTIONS 01/19/20	23 YB	100174030	Admin, Ensoftek	H0004, HA	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

Sourc	е Туре	Code Modifiers	Unit	Price Adj Amt	t Adj Type	Rea\$on	Adj Group Code	Units	Justify	Provider	Note
୍ର	CPT4	90834		180	Patient 🗸	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~	1	Z63.1 🗸	Admin, Ensoftek 🗸	0
		NDC: 45678-9876-34) Qty:	2) (ML 🔹							
୍ଷ	HCPCS	H0004		65	Patient 🗸	· · · · · · · · · · · · · · · · · · ·	~ *	1	Z63.1 🗸	Admin, Ensoftek 🗸	
		NDC: 12345-6789-09	Qty:	3 Grams	•						
୍ଷ	HCPCS	H0004 HA		50	Patient 🗸	• • • • • • • • • • • • • • • • • • •	~	1	Z63.1 🗸	Admin, Ensoftek 🗸	
		NDC: 23456-7890-01	Qty:	4 Milligrams \	•						- 1
L	ICD10	Z63.1						(Admin, Ensoftek 💊		- 1

HCFA Claim Form

	17a.		FROM	.∰ TO			
	17b. NPI						
19. ADDITIONAL CLAIM INFORMATION (Designated by NUC	CC)		20. OUTSIDE LA	B?	CHAF	RGES	
21 DIAGNOSTS OF NATURE OF THINESS OF INTURY (Palet	a A-L to convice line below (245)) ICD In		O VES NO		0.010		
A, Z631 B. B.	C. D. D.		Original Claim	ON CODE	✓	MAL KEP. NU	
	G. H.		23. PRIOR AUTH	ORIZATION	NUMBER		
24. A. B. C. D. P	ROCEDURES, SERVICES, OR SUPPLIES	E,	F.	G	н. І.	J.	
DATE(S) OF SERVICE Of EMG C	PT/HCPCS A B C D	DIAGNOSIS POINTER	\$ CHARGES	Days E Or F Units	EPSDT ID Family QUAL	RENDERIN PROVIDER I #	
DC Qual: N4 NDC Code: 12345678909 NDC Qty: 3 NDC M	eas: GR						
2023-01-20 🗰 2023-01-20 🗰 03 🛚		A	65.00	1		207Q00000X	
NDC Qual: N4 NDC Code: 23456789001 NDC Qty: 4 NDC M	eas: ME				1.001		
2023-01-20	H0004 HA	A	50.00	1	ZZ	207Q00000X	
NDC Qual: N4 NDC Code: 45678987634 NDC Qty: 2 NDC M	eas: ML	1				· ــــــــــــــــــــــــــــــــــــ	
2023-01-20	90834	A	180.00	1	ZZ NPI	207Q00000X	
25. FEDERAL TAX I.D. NUMBER SSN EIN 343454366665 O	26. PATIENT'S ACCOUNT 27. ACCE NO. ASSIGNME	PT INT?	28. TOTAL CHAR \$ 295.00	GE 29. AMOL \$ 0.00	UNT PAID 30. R	svd for NUCC	
Date Of Initial Treatment: 2023-01-20	32. SERVICE FACILITY LOCATION AND	INFORMATION	33. BILLING PRO	VIDER INFO), & PHONE ≠		
Date Last Seen: 2023-01-20	Program Name: CDI	-	Billing Pro	vider: PP YE	ELLOW BRICKS		
Supervising Physician: (Last, First, MI)	City: CANOGA PARK	<u> </u>	Ad	City: PORT	ILAND		
Supervising Physician NPI:	State: CA Zip: 91303		State: CA Zip: 32111				
Supervising Physician ID:	Pay-To Address: 132, DOWN STREET		Billing C	lame:	D		
(Last, First, MI)	City: PORTLAND		Telep Specialty/Tayor	hone: 44343	355367		
Ordering Physician NPI:	State: ORE Zip: 54321		opecialcy/ laxor	ioniy: House			



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.

ontact Record	
Form Description	
lient 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	ition here		Clear Text							ו
ather	-											
Name/Title	Relationship	Email	DOB	Address	City	County	State	Zip Code	Home #	Cell #	Other #	Work #
letté vetjágen	iefensign	Set Participation	3885-35- 36									0000000
49.66ety	sistalately	1993999999	4855-46- 35	3080-4-798 Caspi Paradas	Appendied	Sarges	Gê.	200978	545-535- 5558	115-15	200-200- 2000	385-985- 3885
Sentification	lestjoni.com	Testginal.com	2005-00- 00	(SSP/IP/Iklainsk)	skefser	Gregar	æ	99996	545-535- 5339	112-112 117-112	1010	389-989- 3889
	and a light	preta de la contencia de la con	10000									10500500

Write-offs are now an Adjustment

Core

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

Pay	men	ts / Refunds														
s	EAR	CH PAYMENT ERA POS	TING	New Payr	ment											
Pa	ayme	ent List									_					
0	Date	Of Entr -) From: 02/01/20	23 🧱	То:		1		Payment Method:	Adju	istment	Check	/Ref er:)		
P	aymou (mou	ent	Paying Entity:		~	Ð		Payment Category	:	,	Pay S	tatus:		*)		
P	ayme	ent From:						Payment	ID:		Facilit	y: Select	Program	(s)		٠
s	Sort R	esult by:	 Payment Received by: 	\$	elect			•								
												Search	Prir	nt	CSV	Export
		ID	Date Of Entry	Paying Entity	Payer	Facility	lns Code	Payment Method	Check/Ref Number	Pay Status	Payment	Undistributed		Check Status	Refund Status	Payment Received By
P	×	7161826669223813387	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt			
	×	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
	~	7101004015015140400	00/14/0000	Olivert	Guard	010		A		Annelland	0.00	0.00	Deseries			Admin,

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 Das Dashboard with over Show Client(s):	hboard Clinician chandan rail status of all Individual where the idmitted Obischarged Due I	a g e counselor is t Date by:S	Ir he admit provid Select	nclude inact ler or a memb Show only o	tive users per of the care tea details which are i	Refresh im ncomplete.	Export to Excel		*	
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	szkrrxpT	afrtauiQ	1002099	01/07/2021	02/02/2023	Not yet			المالي 14/02/2023 المالي المالي 14/02/2023 المالي مالي
g chandana (P)	APOLLO	szkrrxpT	afrtauiQ	1002099	30/06/2022	Not yet	Not yet	al 02/07/2022		 34/02/2023 34/02/2023 34/02/2023 34/02/2023 34/02/2023

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 ZI		
write your answers here		6
Email address	Fax number	
write your answers here	write your openiors 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
ROL NEW FORM Form Description Rol Form Rol Form 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:	
Labels displayed by selected language	
Display Start and Stop Times	
Save	
Section List	
Add or modify form sections.	
ROI Section Default roi fields. Edit X 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.