



DrCloudEHR™ November Release Notes

Release to Staging Site – October 31, 2022

Release to Production Site – November 06, 2022

Table of Contents

| | |
|---|----|
| Overview | 3 |
| Practice | 4 |
| Option to Queue Email Notifications..... | 4 |
| Billing..... | 5 |
| ERA Processing – Option to Filter which Claims are Processed | 5 |
| Ability to Make Changes to Fee Sheets for encounters in Closed Accounting Periods | 6 |
| Choose Accounting Date at General Ledger Export | 8 |
| Option to Require Encounters be closed prior to Generating a Claim..... | 9 |
| View The Master Charge Fee per unit in the Fee Sheet..... | 10 |
| Reports..... | 11 |
| Deposit Report – Additional Details Included | 11 |

Overview

This document contains the Release Notes for November 2022. Upon receipt, please review and test the 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 release



Requires purchase and additional setup

*Please note that 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, don't hesitate to contact our support team at support@drcloudemr.com.

Practice

Option to Queue Email Notifications

Core Setup

There is now the ability to select how the system will send out email notifications, allowing the following options:

- **Immediate**
- **Queue**
- **Stop**

The default option is **Immediate**, this is current behavior, emails are sent out right away. The **Queue** option creates a batch to be sent out at 1-hour intervals. Finally, **Stop** will block the system from sending out email notifications.

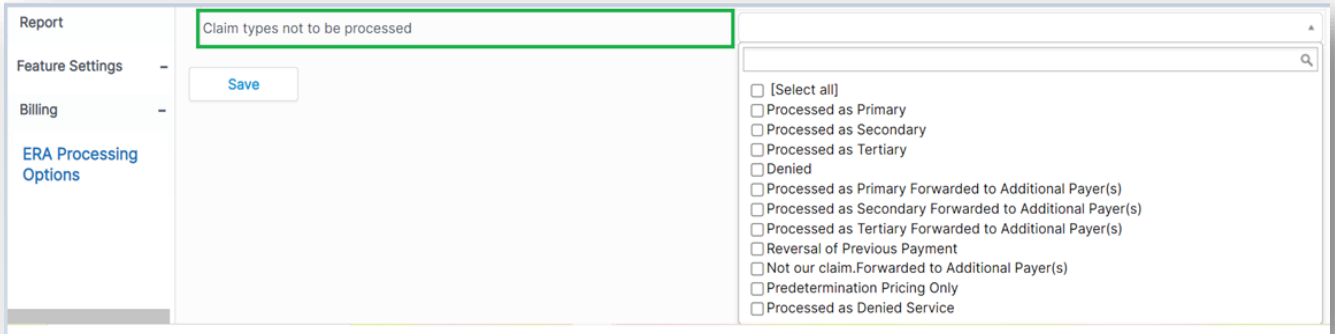
| Id | Category Name | Frequency | Actions |
|----|-----------------------------------|-----------|---------|
| 1 | Cron Alert | Immediate | |
| 2 | OTP | Immediate | |
| 3 | Patient portal | Immediate | |
| 4 | Telehealth & Appointments | Queue | |
| 5 | Goldenthread Alerts | Queue | |
| 6 | Pan Alerts | Queue | |
| 7 | Admit/Discharge | Queue | |
| 8 | Helpfuldie | Immediate | |
| 9 | DrFirst/Prescriptions/Medications | Immediate | |
| 10 | Transmit CCD | Immediate | |
| 11 | PH Tech | Immediate | |
| 12 | Documents | Queue | |
| 13 | Pay.gov | Immediate | |
| 14 | Backup Alerts | Immediate | |
| 15 | User Emails | Immediate | |
| 16 | Reminders | Immediate | |
| 17 | Procedure Order Form | Queue | |
| 18 | Waitlist | Immediate | |

Billing

ERA Processing – Option to Filter which Claims are Processed

Core  Setup

Authorized users can now configure the desired type of claims that should or should not be processed when an **ERA (Electronic Remittance Advice)** file is received and uploaded.



Ability to Make Changes to Fee Sheets for encounters in Closed Accounting Periods

Core Setup

The system now permits users to add service codes in the **Fee Sheet** when it is in a closed accounting period. Once the user makes a change to the service code (i.e., units, modifier, etc.), the added service code will go to that month's general ledger, based on the **Bill Date** or **Added Date**.

Note: There is no longer the option to delete a closed accounting period in the accounting period page.

Fee Sheet (This encounter is of closed accounting period. If you need change it, reopen the accounting period.)

[Close Encounter](#) ⓘ

The accounting period is closed. If you need to change it, the accounting period must be re-opened.

| Source | Type | Code | Modifiers | Unit Price | Units | Justify | Provider | Note | Billable | Bill Type |
|--------|------|-------|----------------------|------------|-------|---------|-----------------|----------------------|------------|-----------|
| | CPT4 | 90281 | <input type="text"/> | 200 | 5 | C12 ▾ | -- Default -- ▾ | <input type="text"/> | Billable ▾ | HCFA ▾ |
| | CPT4 | 90375 | <input type="text"/> | 250 | 2 | C12 ▾ | -- Default -- ▾ | <input type="text"/> | Billable ▾ | HCFA ▾ |

ICD10 C12 -- Default -- ▾

Insurance: (P):ASSURANT HEALTH ASA(01/10/2021 - current)ReadMe

Place Of Service: 11: Office ▾ Bill-To: Insurance ▾ Use Provider Name for Billing

Providers: Rendering User, Good ▾ Supervising reddy, alex ▾ Referring: -- Unassigned -- ▾ Referring: -- Unassigned -- ▾

Price Level: Standard ▾ Prior Authorization: --Unassigned--

[Save](#) ⓘ [Save & Generate Claim](#) [Refresh](#) [Add Codes](#) [View Adjustments](#) [Fee Sheet History](#)

← 2022 →

| Action | Name | Month-Year | Status | Created By | Created On | Last Modified By | Last Modified On |
|---|---------------|------------|--------|-------------------------|---------------------|-------------------------|---------------------|
| Edit Delete | October 2021 | Oct-2021 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | November 2021 | Nov-2021 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | December 2021 | Dec-2021 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | January 2022 | Jan-2022 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | February 2022 | Feb-2022 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | March 2022 | Mar-2022 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit | April 2022 | Apr-2022 | Closed | Administrator, Ensoftek | 02/09/2022 19:25:01 | Administrator, Ensoftek | 04/10/2022 17:41:35 |
| Edit Delete | May 2022 | May-2022 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | June 2022 | Jun-2022 | Open | Administrator, Ensoftek | 02/09/2022 19:25:01 | | |
| Edit Delete | July | Jul-2022 | Open | Administrator, Ensoftek | 10/08/2022 15:00:20 | Administrator, Ensoftek | 10/08/2022 15:02:58 |
| Edit | August | Aug-2022 | Closed | Administrator, Ensoftek | 10/08/2022 21:29:58 | Administrator, Ensoftek | 22/09/2022 22:10:47 |

Option to use Accrual Method of Accounting for General Ledger Exports

Core Setup

Authorized billing users can now configure the **Accounting Date** to be calculated based on the **Claim Submission Date** or the **Date of Service**. This option is useful for agencies that use the Accrual Method of accounting. When a user exports a general ledger, this selection decides how the system will calculate the dates included.

Facility

Service

Program Type

Post To Date

[← Deselect](#)

[⇄ Select All](#)

[⇄ Deselect All](#)

[Reset List](#)

Payer Type

Other Settings

| Setting Name | Setting Value |
|---|--|
| Separator for Revenue Account Number | - |
| Length of GL Account Numbers | 20 |
| Records to display on the page(max of 1000) | 100 |
| GL Number for patients with no insurance | NOINS |
| Ledger number for GL parameter should be unique | <input type="checkbox"/> |
| GL Number for patients with no payer types | NOPAYERTYPE |
| Accounting Date | <div style="border: 1px solid #ccc; padding: 2px;"> Service Date ▼ <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> Claim Submission Date Service Date </div> </div> |

Option to Require Encounters be closed prior to Generating a Claim

Core Setup

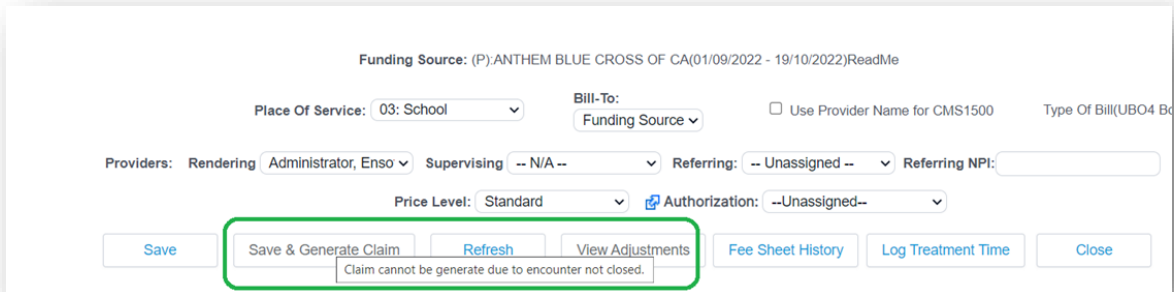
The system can now be configured to block or stop a claim from being generated if the status of the encounter is not set to **Closed**. When enabled, the following buttons will be disabled at the **Billing Manager** screen until the encounter is closed:

- **Generate Claim(s)**
- **Generate & Submit Claim(s)**

As shown below, hovering over the **Golden Thread** triangle notification will display a message stating, "Encounter Not Closed".



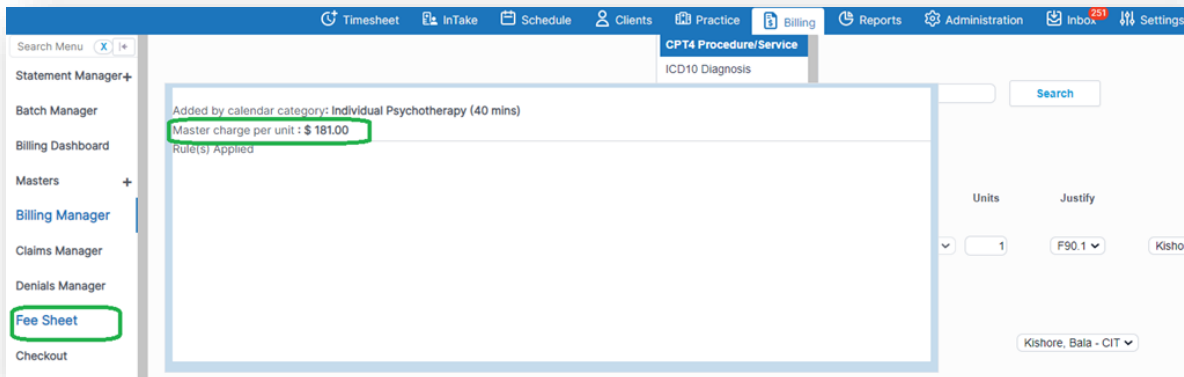
At the **Fee Sheet** screen, the **Save & Generate Claim** button is disabled until the encounter is closed.



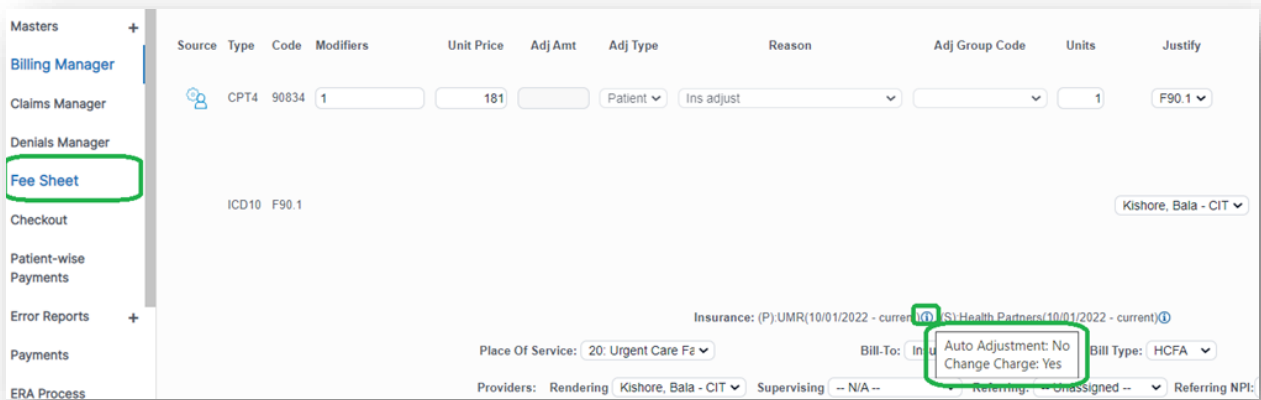
View The Master Charge Fee per unit in the Fee Sheet

Core Setup

At the **Fee Sheet** screen, there is now the option to view the master charge from services to see whether there is a difference between the charge in the Fee Sheet and the charge from services. To view this, simply hover over the source icon to view the **Master Charge per unit**.



At the **Fee Sheet** screen, users can see whether the system is configured to adjust the charge to match the contracted rate or not in the payer record. To view this, simply hover over the icon displayed next to the **Payer Name**.



Reports

Deposit Report – Additional Details Included

Core

The **Deposit Report** now displays the following additional details:

- **Allocation Details**
 - Expand/Collapse Allocation Details (dependent on approved attached document)
- **Facility**
- **Program Ledger Account Number**
- **Payer Ledger Account Number**

Report - Deposit Report

Post Date From: 01/10/2022 To: 26/10/2022 Program: Select Program(s) Paying Entity: All

Funding Source: Patient: First,Last(PID/HRN)

Search Print CSV Export

Records: 53

| Post To Date | Paying Entity | Payer | Insurance Type | Payment Method | Check/Ref Number | Pay Status | Payment | Undistributed | Payment Received By |
|--|--------------------|------------|-------------------|-----------------|------------------|------------|---------|---------------|-------------------------|
| 26/10/2022 | Patient | Power Hot | | Cash | | Applied | 0.00 | 0.00 | |
| | Encounter Facility | Patient | Invoice | Date of Service | Service Code | Charges | Payment | Adjustment | Risk W/hold |
| | Save Nature Clinic | Power Hot | 1001587.100172636 | 26/10/2022 | 90281 | 100.00 | 0.00 | 100.00 | 0.00 |
| Total(s) of Charge(s), Payment(s), Adjustment(s), Risk W/hold(s) | | | | | | 100.00 | 0.00 | 100.00 | 0.00 |
| 21/10/2022 | Patient | DFT Client | | Cash | | Applied | 1.00 | 0.00 | Administrator, Ensoftek |
| | Encounter Facility | Patient | Invoice | Date of Service | Service Code | Charges | Payment | Adjustment | Risk W/hold |