



# DrCloudEHR™ November Release Notes

Release to Staging Site – October 30, 2022

Release to Production Site – November 06, 2022

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## 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](mailto: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.

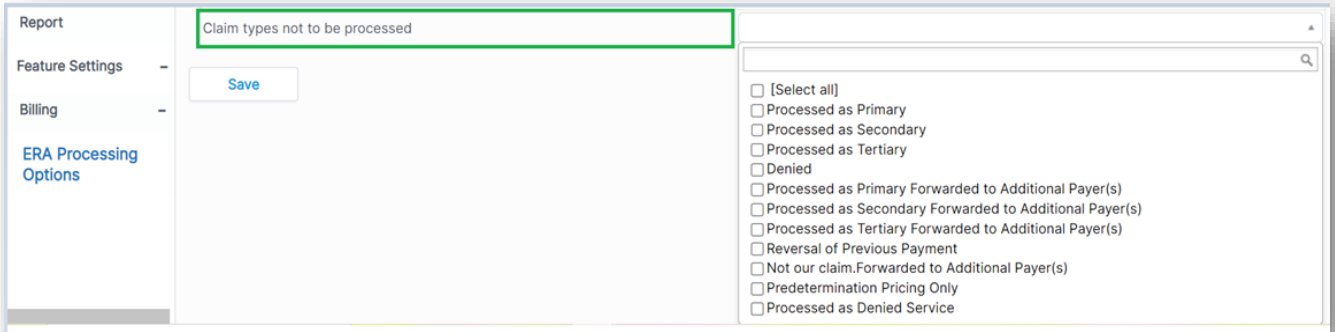
Id	Category Name	Frequency	Actions
1	Cron Alert	Immediate	
2	OTP	Immediate	
3	Patient portal	Immediate	
4	Telehealth & Appointments	Queue	
5	Goldenthread Alerts	Queue	
6	Pan Alerts	Queue	
7	Admit/Discharge	Queue	
8	Helpfuldie	Immediate	
9	DrFirst/Prescriptions/Medications	Immediate	
10	Transmit CCD	Immediate	
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
<a href="#">Edit</a> <a href="#">Delete</a>	October 2021	Oct-2021	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	November 2021	Nov-2021	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	December 2021	Dec-2021	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	January 2022	Jan-2022	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	February 2022	Feb-2022	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	March 2022	Mar-2022	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a>	April 2022	Apr-2022	Closed	Administrator, Ensoftek	02/09/2022 19:25:01	Administrator, Ensoftek	04/10/2022 17:41:35
<a href="#">Edit</a> <a href="#">Delete</a>	May 2022	May-2022	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	June 2022	Jun-2022	Open	Administrator, Ensoftek	02/09/2022 19:25:01		
<a href="#">Edit</a> <a href="#">Delete</a>	July	Jul-2022	Open	Administrator, Ensoftek	10/08/2022 15:00:20	Administrator, Ensoftek	10/08/2022 15:02:58
<a href="#">Edit</a>	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;"> <span>Service Date</span> ▼  <span>Claim Submission Date</span>  <span style="background-color: #007bff; color: white; padding: 2px;">Service Date</span> </div>



## Option to Require Encounters be closed prior to Generating a Claim

Core Setup

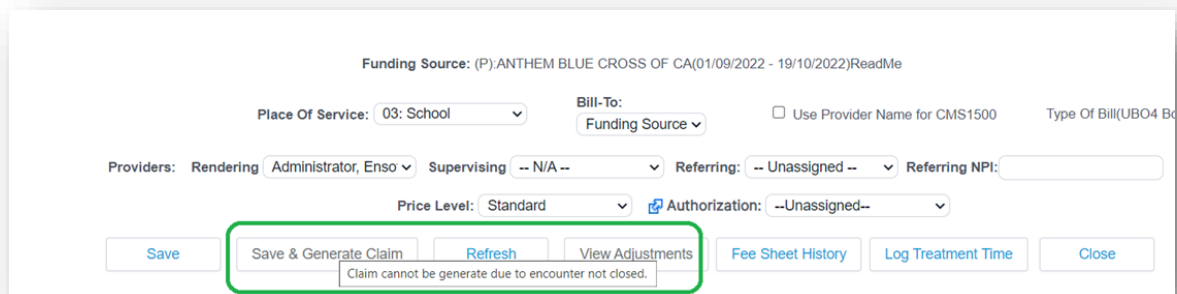
The system can now be configured to block or stop a claim from being generated if the status of the encounter is not set to **Closed**. When enabled, the following buttons will be disabled at the **Billing Manager** screen until the encounter is closed:

- **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".



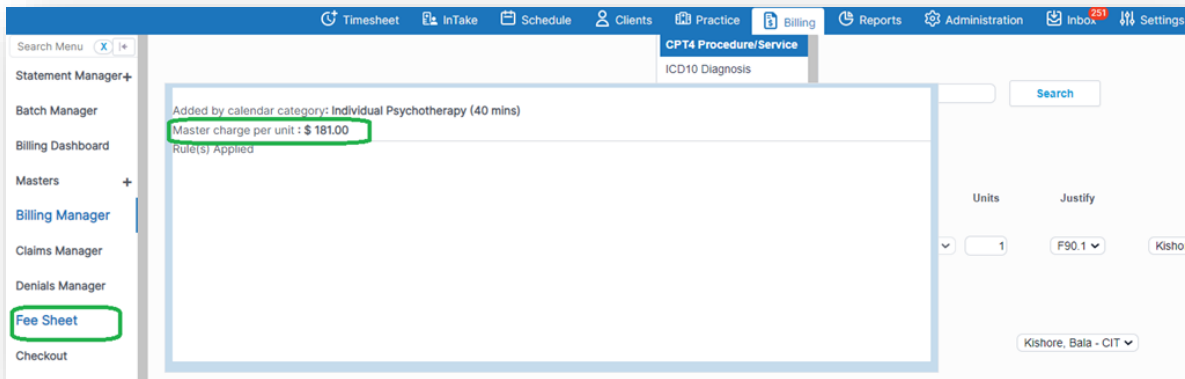
At the **Fee Sheet** screen, the **Save & Generate Claim** button is disabled until the encounter is closed.



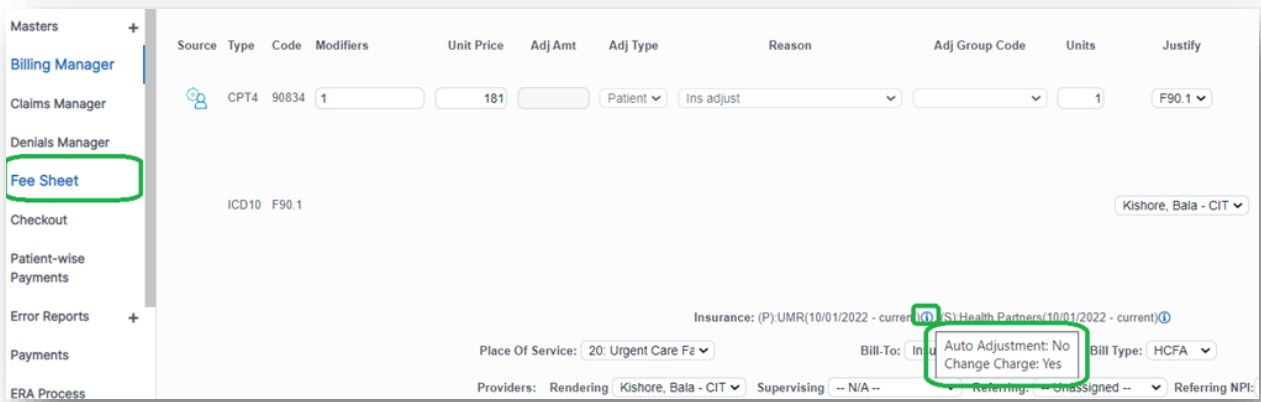
## View The Master Charge Fee per unit in the Fee Sheet

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