



DrCloudEHR™
November 2024 Release Notes

Release to Staging Site – October 27, 2024

Release to Production Site – November 3, 2024

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Overview

This document contains the Release Notes for November 2024. 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 that the terms **client**, **patient**, and **individual** are used interchangeably throughout this document, depending on the feature.

If you have questions regarding staging sites or this release, please contact our support team at support@drcloudemr.com.

Intake

Updates to Intake Module

Core Setup

Added the "Social Security Number" field at the Intake Module. When creating a client record, the applicant's Social Security Number from the referral form is populated in the SSN field.

The screenshot shows the Intake Module form with the following fields and options:

- Last Name: * [Text Input]
- First Name: * [Text Input]
- Middle Name: [Text Input]
- Pronouns: [Dropdown: Not Provided]
- Preferred Name: [Text Input]
- Date of Birth: * [Text Input]
- Age: [Text Input]
- Gender: * Female Male Non-Binary Other
- Home Number: [Text Input]
- Cell Number: [Text Input]
- Other Number: [Text Input]
- Email: [Text Input]
- Street Address: [Text Input]
- City: [Text Input]
- State: [Dropdown: California]
- ZIP: [Text Input]
- Race: [Dropdown: -Select-]
- Language: [Dropdown: -Select-]
- MA#: [Text Input]
- Social Security Number #: [Text Input] (highlighted in green)
- Insurance: [Dropdown: -- Unassigned --]
- Self Pay?
- Is the Client Employed?: Full-Time Part-Time Unemployed Disability
- Is the Client In School?: Yes No Full-Time Part-Time
- Is the Client Pregnant?: Yes No N/A
- Specific Criteria for When Appointments Would Need To be Scheduled?: [Text Input]

Schedule

Updates to New Appointment New Encounter Page

Core Setup

Now authorized users can use the "Mark as Telehealth Appointment" checkbox on the appointment page and the new encounter page to mark a visit for telehealth even if the global setting "Enable Telehealth" is set to OFF.

Display actual check-in times for appointments

Core Setup

DrCloudEHR now displays the actual check-in time for both individual and group appointments in a tooltip when you hover over the event in the schedule

Ability to add and search for "Service Reserved" appointments

Core **Setup**

DrCloudEHR now provides the ability to create and search for providers that have reserved times for specific calendar categories or appointment types.

Find Available Appointments:
Enter criteria and then click Search.

Start date: Days:
First date to include. Number of Days.

Service Types: Service Reserved Categories: Clinician:
Select the ALL option to allow filtering by user's Gender/Language.

User Certification: Gender: Language:
Gender of Clinician. Spoken Language of Clinician.

Insurance:
When a insurance is selected, available slots are shown only for those providers who are mapped with the selected insurance.

Search Results:
Items matching your criteria.

Day	Available Times
Wednesday 10/23/2024 John Clinician	AM 8:00 8:30 9:00 9:30 10:00 10:30 11:00
Thursday 10/24/2024 John Clinician	AM 8:00 8:30 9:00 9:30 10:00 10:30 11:00

If the user selects any of the "Service Reserved Categories" while adding/editing the appointment, available providers are displayed based on the category mapping.

Appointments based on Provider Certification Level

Core **Setup**

DrCloudEHR now provides the ability to search for appointments based on a provider's certification level. For e.g. Search for appointments with a psychiatrist versus LMHT.

Authorized users can add/update certifications to the Provider at Administration -> User -> Other Settings:

Main Navigation Bar → Timesheet InTake Schedule Persons Practice Billing Reports Administration **Inbox 1008**

Administration Home System Workflow Global Settings **Users** CCBHC Settings Exclusions Layouts

Profile Access Settings HR **Other Settings** Analytical Reports Settings Chartmets ASAM Access

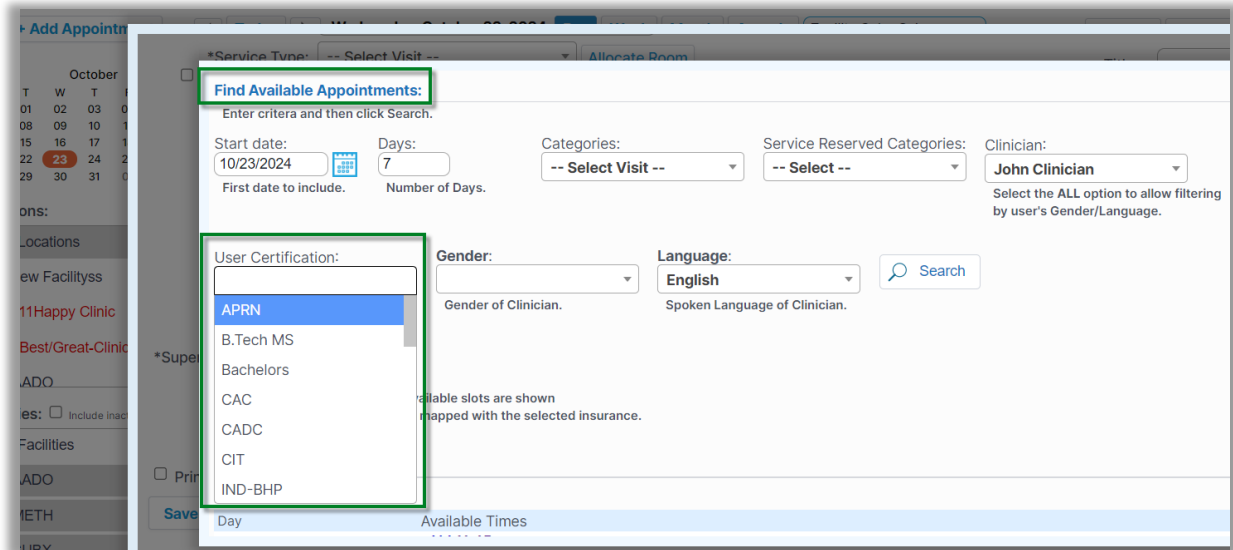
From Date: To Date:
 User Certification: Program:

Clear

Certification History

From Date	To Date	Certification	Program
09/03/2024		Psychiatrist	1 New Facilityss

The added certifications are mapped to "Find Available Appointments" based on user certifications.



Practice

Tile and list view for selecting addresses

Core Setup

DrCloudEHR now provides the option to switch between "Tile" and "List" views when selecting an address in primary contacts.

Find Address
Click on a address below to copy that information into the form.

Search by: Include Inactive

Search by Firstname, Lastname, ID, Organization Name

Action	First Name	Last Name	City	Email	Mobile	Organization
<input type="button" value="Select"/>	Referral Organization		Salem			REFERRAL demo
<input type="button" value="Select"/>	Redwood					
<input type="button" value="Select"/>	Cytocheck					
<input type="button" value="Select"/>						Internal
<input type="button" value="Select"/>	as Location					
<input type="button" value="Select"/>	Douglas		Clackamas		503-652-2880	Kaiser Permanente - Lancaster
<input type="button" value="Select"/>	McKay		Salem		503-949-9876	Marion County Health and Human

Updates to Golden Thread Error Reports

Core Setup

Implemented the below changes at Practice -> Golden Thread Rules -> Golden Thread Error Report.

- Show entries: By default, 50 entries in selected in the dropdown.
- GT Rules: All the GT rules are displayed in a single row.
- Search: Text-box.
- Due date: Due date for every encounter and sorting order.

Show | 50 entries

PID	Name	Date of Service	Encounter ID	Encounter Provider	Encounter Category	Due Date	GT Rule
1002497	John Smith	10/17/2024	100199230	user007_test007	ATS - Group Therapy	10/23/2025	MDTP Plan was Patient signed
1002497	John Smith	10/17/2024	100199230	user007_test007	ATS - Group Therapy	08/29/2025	MDTP Plan was created
1002497	John Smith	10/09/2024	100199123	Veterinarian doctor	Healthy Relationships/Dating in Recovery	10/16/2024	14 day treatment plan
1002497	John Smith	10/17/2024	100199230	user007_test007	ATS - Group Therapy	09/11/2024	14 day treatment plan

Showing 1 to 4 of 4 entries

Previous | 1 | Next

Option to make records active/inactive

Core Setup

Implemented the below changes at Practice -> Administrative -> Address Book.

DrCloudEHR now provides an option to mark a record as active/inactive. By default, all added new addresses will be active. It also provides the option to include inactive organizations and inactive addresses using ACLs.

The include inactive checkbox is available based on the new ACLs

1. Hide "Include Inactive Organizations" is active, then the Include Inactive checkbox will be hidden in the following places.

- Organizations
 - Fax Center
 - Client ROI
 - Mental Health ROI
2. Hide "Include Inactive Addresses " is active, then the Include Inactive checkbox will be hidden in the following places.
- Address Book

Reports

Added PID column to client reports

Core Setup

Implemented the below changes to Reports > Clients > List shows PID

Added the PID (Patient ID) column next to the Last Name column.

Report - Patient List

Visit Range:

Service Date From: 10/23/2024 Service Date To: 10/23/2024 Encounter Facility: Select [Search](#)

Residents Show Discharged/Deceased Date

--All--
Admitted
Discharged
Deceased

[Print](#)
[Export CSV](#)

Records: 4

Last Visit	First Name	Last Name	PID	ID	Street	City	State	Zip	Home Phone	Work Phone	Discharged	Deceased
10/23/2024			1003815	070781	221b , Baker Street, near clock tower	Chicago	CO	07863	777-777-7777	777-777-7777	04/18/2024	
10/23/2024			1002497	1002497	1-117	Medford	CA	517235	111-111-1111	222-222-2222	10/09/2024	
10/23/2024			1003665	1003665	Plot no 133, Good street @ 123	Kingtea	CA	34322				

Service Count Report

Core Setup

Implemented a report "New Service Count" to display Location/Facility with counts of services. Clicking on the Number displays the list of clients/patients.

Report - New Service Count

Service Date From: 10/23/2024 Service Date To: 10/23/2024 Location:

Facility: Select

Client: First,Last(PID/HRN)

[Search](#)
[Print](#)
[CSV Export](#)
[Offline Reports](#)

Total Number of Record(s): 8

Location	Facility	Service Code(s)	Count
	Save Nature Clinic	H0047	1
1 New Facilityyss	Save Nature Clinic	789	1
1 New Facilityyss	Save Nature Clinic	90378	1

Demographics-Issues-Diagnosis

Added a Diagnosis "History" view

Core  Setup

Implemented at Patient demographics -> Issues -> Diagnosis


Added a Diagnosis "History" Icon at the end of the row, displaying the diagnosis history.

Added the checkbox "Show Inactive Medical Problems" which is enabled by default and displays all diagnosis codes.

[Back](#)

[Add](#) [Preview/Print](#) [Diagnosis/Concerns](#) Show Inactive Diagnosis/Concerns

Title	Begin	End	NDCID	Status	Occurrence	Provider	Referred By	Modified By	Last Modified Date	Enc	Pri	Facility
ICD10:F33.0(Major depressive disorder, recurrent, mild)	08/01/2024 12:00 AM	10/31/2024 12:00 AM		Active	Unknown or N/A			Ensoftek Admin	10/23/2024 03:43 PM	0		
ICD10:F32.5(Major depressive disorder, single episode, in full remission)	08/01/2024 12:00 AM	07/30/2024 12:00 AM		Inactive	Unknown or N/A			Ensoftek Admin	08/21/2024 12:36 AM	0		
ICD10:M01.X79(Direct infection of unspecified ankle and foot in	08/01/2024	08/31/2024		Inactive	Unknown or			Ensoftek	08/21/2024	0		

Modified	Enc	Pri	Facility	Comments	Reported by Client	Outside agency?	Diag(Click for education)	History
10/23/2024 03:43 PM	0						ICD10:F33.0(Major depressive disorder, recurrent, mild)	
08/21/2024 12:36 AM	0						ICD10:F32.5(Major depressive disorder, single episode, in full remission)	
08/21/2024	0						ICD10:M01.X79(Direct infection of unspecified ankle and foot in	

Billing

Option to filter records based on PaymentID

Core Setup

Billing Manager -> added an option "PaymentID" to filter the records based on PaymentID.

The screenshot shows the 'Billing Manager' search interface. It is divided into three main sections:

- 1. Available Search Criteria:** A list of search criteria including Location, Marked For Rebill, Marked as Cleared, Modifiers, PRP Billing, and Payment Id. 'Payment Id' is highlighted.
- 2. Value:** A text input field containing the value '7162713858204073418'.
- 3. Review Current Criteria:** A list of selected criteria, currently showing 'Payment Id - 7162713858204073418'.

Buttons for 'Remove Selected' and 'Clear' are located at the bottom right.

Updates to Invoice Manager

Core Setup

Invoice Manager -> Invoice -> Added "Units" column before charges.

The screenshot shows the 'Invoice Details' screen. At the top, there are fields for Client, Provider, Invoice, Svc Date, and First Billed Date. Below these are fields for Statements Sent, Check/EOB No., Check/EOB Date, and Deposit Date. A 'Billing Notes' section is also present.

The main part of the screen is a table titled 'Claim Details' with the following columns: Code, Units, Total Charges, Balance, By/Source, Done With, Deposit Date, Pay, Adjust, Reason, Adj Group Code, Rebill, Follow-up Reason, and Del. The 'Units' column is highlighted with a green box.

Code	Units	Total Charges	Balance	By/Source	Done With	Deposit Date	Pay	Adjust	Reason	Adj Group Code	Rebill	Follow-up Reason	Del
T1040	3.00	300.00											
				Ins1 ePay - 95024113		10/22/2024		10.00	45 - Charges exceed your contracted/ legislated fee arrangement	Contractual Obligation	<input type="checkbox"/>		<input type="checkbox"/>
				Ins1 ePay - 95024113		10/22/2024	50.43				<input type="checkbox"/>		<input type="checkbox"/>
		239.57		Insurance 1	None						<input type="checkbox"/>		<input type="checkbox"/>

Ability to edit transactions in payment allocated screen

Core Setup

Billing -> Payments -> Allocated Details

DrCloudEHR now includes a Global flag "Edit transactions in payment allocated screen". Enabling this flag will provide users with the ability to edit payments, adjustments and other editable values.

Edit Payments Close

Date of Entry: 10/22/2024 Post To Date: 10/21/2024 Payment Method: Electronic Check/Ref Number: ePay - 95024113

Payment Amount: 1000.00 Payer: Insurance Payment Category: Funding Source Facility: -- Select Program --

Payment From: BLUE SHIELD OF CA 100105 Payment Received by: Ensoftek Admin

Deposit Date: 10/22/2024 Description: BLUE SHIELD OF CA UNDISTRIBUTED: 89,715.43

New Allocations **Allocated details** CSV Export

1 Encounters per page: 100

Client Name	Post For	Done With	Srv Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copy	Current Balance	Allowed(c)	Payment	Capitation	Adj Amount	Adj Reason	Adj Group Code	Deductible	Recoupment	Follow Up	Follow Up Reason	
<input checked="" type="checkbox"/> Carter Will	Inst: BLUE SHIELD OF CA	None	10/19/2024	SNC	100199360	Ensoftek Admin	T1040	300.00	0.00	239.57	0	50.43		10	45 - Charges excs	Contractual Obligi	0	0	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Carter Will	Inst: BLUE SHIELD OF CA	None	10/21/2024	NPA	100199356	Ensoftek Admin	T1040	200.00	0.00	-90480	0	90665		15	45 - Charges excs	Contractual Obligi	0	0	<input type="checkbox"/>		
											0.00	90715.43	0.00	25.00			0.00	0.00			

New filters at Billing -> Payments -> New Allocations



DrCloudEHR includes the following new filters at Billing -> Payments -> New Allocations.

Added the following filters @ Claim Number, Service from & Service To dates, Search button.

- Search with Claim Number: results are displayed based on associated encounters against that claim number.
- Search with Service from and Service to dates: results are displayed based on encounter date.

Edit Payments Close

Date of Entry: 10/22/2024 Post To Date: 10/21/2024 Payment Method: Electronic Check/Ref Number: ePay - 95024113

Payment Amount: 1000.00 Payer: Insurance Payment Category: Funding Source Facility: -- Select Program --

Payment From: BLUE SHIELD OF CA 100105 Payment Received by: Ensoftek Admin

Deposit Date: 10/22/2024 Description: BLUE SHIELD OF CA UNDISTRIBUTED: 89,715.43

New Allocations **Allocated details** Modify Payments

Person: Carter Will 1004309 Show: All Transactions Services: Billable Services Done With: Select an option Rebill:

Claim number: P-1004309-1005613202(TEST) Service From: 10/01/2024 Service To: 10/23/2024

1 of 1 Results per page: 40

Ins: N/A Ins2: N/A Ins3: N/A

Post For	Service Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copy	Balance	Allowed	Payment	Capitation	Adj Amount	Adj Reason	Adj Group Code	Deductible	Recoupment	Done With	Rebill	Follow Up	Follow Up Reason
Inst: BLUE SHIELD OF CA	10/19/2024	SNC	100199360	Ensoftek Admin	T1040	300.00	0.00	239.57	0	0	0	0			0	0	None	<input type="checkbox"/>	<input type="checkbox"/>	
										0	0	0	0			0	0			

Inbox

New column in Sent Items

Core Setup

Inbox > Messages > Sent Items

Added a new column in "Sent Items" to show the body of the message.

The screenshot shows the 'Messages(collapse)' interface with 'SENT ITEMS' selected. A table lists a message with a new 'Content' column highlighted by a green box. The message content is: '2024-10-23 22:08 (good to john) Please collect the remaining Balance of \$100 on his next visit.'

To	Person	Type	Content	Date
John Clinician	John, Smith	Bill/Collect	2024-10-23 22:08 (good to john) Please collect the remaining Balance of \$100 on his next visit.	2024-10-23