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DrCloudEHR™
November Release Notes

Release to Staging Site – October 31, 2022

Release to Production Site – November 06, 2022

Table of Contents

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:

✅ Core
Available to all users when released

➕ Add-on
Dependent on the activation of other feature(s)

⚙ Setup
Some setup is required after release

💲 Add-on
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.
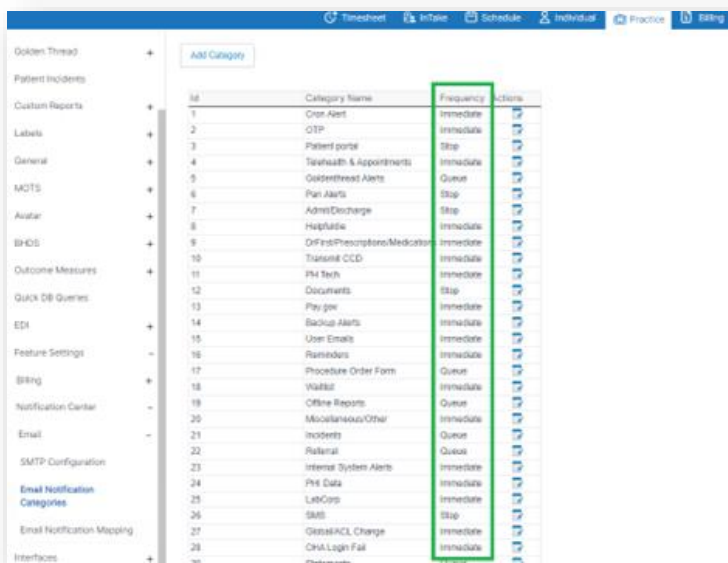
Practice

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**, with no change in email sending functionality. **Queue** creates a batch to be sent out at 1-hour intervals. Finally, **Stop** will block the system from sending out email notifications.
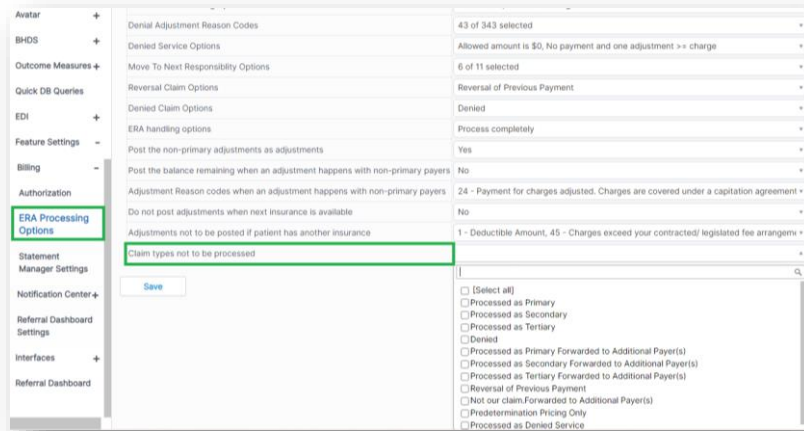
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ERA Processing – Option to Filter which Claims are Processed

☑ **Core**   ⚙ **Setup**

The system now has the ability to change the desired type of claims that should or should not be processed when an **ERA (Electronic Remittance Advice)** is received and uploaded.

Billing

Ability to Make Changes to Closed Accounting Periods at Fee Sheet

☑ **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**.

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

Choose Accounting Date at General Ledger Export

☑ Core   ⚙ Setup

The system now provides the option to change the **Accounting Date** to be calculated based on the **Claim Submission Date** or the **Service Date.** When a user exports a general ledger, this selection decides how the system will calculate the dates included.

Commented [CT1]: @Ramesh Nagul please confirm this is an accurate statement of the functionality

Facility
Service
Program Type
Post To Date

← Deselect
⇄ Select All
⊨ Deselect All
Reset List

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	☐
GL Number for patients with no payer types	NOPAYERTYPE
Accounting Date	Service Date
	Claim Submission Date
	Service Date

## *Option to Restrict Generating a Claim for a Closed Encounter*

Commented [CT2]: This title might need some love

☑ Core ⚙ Setup

The system can now be configured to block or stop a claim from being generated until the status of the encounter is 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".
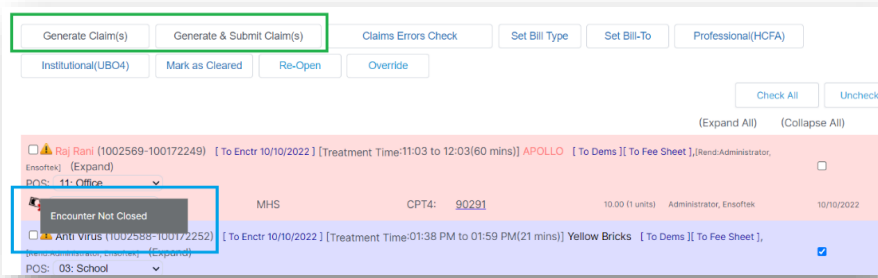

At the **Fee Sheet** screen, the **Save & Generate Claim** button is disabled until the encounter is closed.
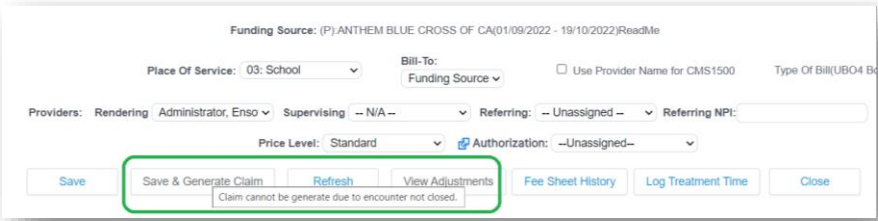
Choose Accounting Date at General Ledger Export

☑ **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, hover over the source icon and the **Master Charge per unit** will be displayed.
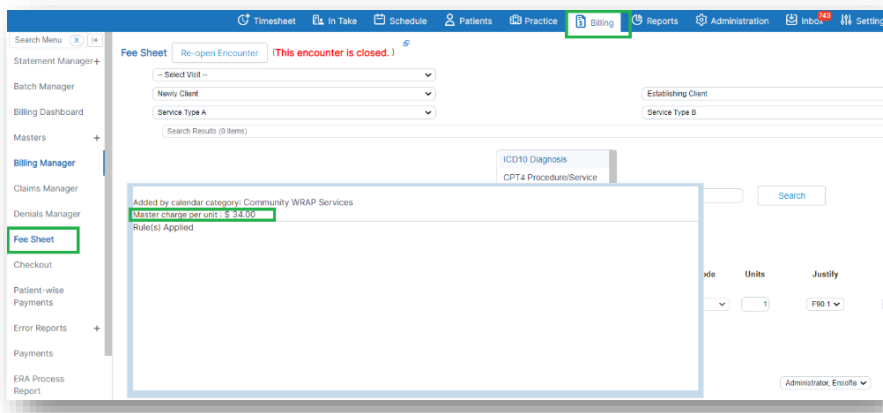
At the **Fee Sheet** screen, users can see whether the system is set in payer detail to adjust the charge to match the contracted rate or not. To view this, hover over the icon displayed next to the **Payer Name**.

Commented [CT3]: @Ramesh Nagul The functionality is not described well here. Can you help with this one?
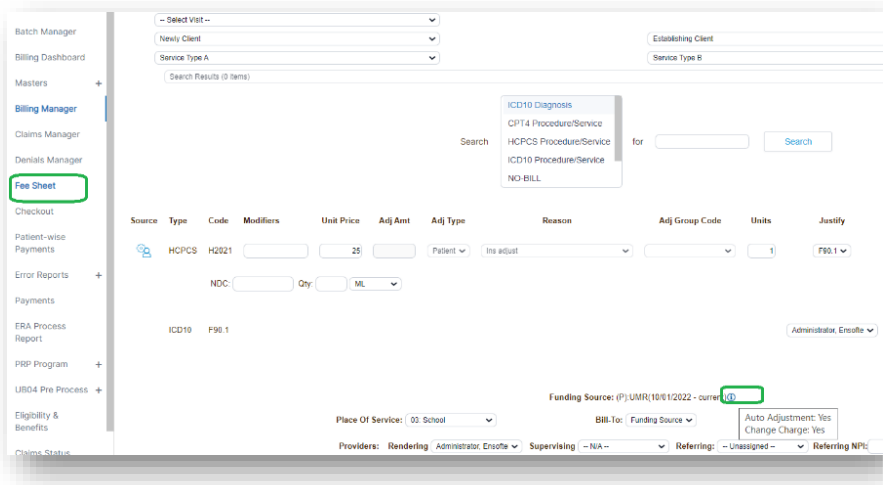
Reports

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**

Commented [CT4]: @Suryadharshan Alle this screenshot is blurry on my screen. If the same for you, could we get a new one?

Commented [MR5R4]: @Cody Thomas @Suryadharshan Alle the screenshots are blurry on my screen too