



# DrCloudEHR™ October Release Notes

Release to Staging Site – September 25, 2022

Release to Production Site – October 02, 2022

## Table of Contents

Overview .....	3
Insurance.....	4
Inactive Programs Now Available in Insurance Selection .....	4
Practice .....	5
OpenEdge Credit Card Payment Processing – Multiple Account Support.....	5
Bed Management Improvements to Search.....	6
Billing.....	7
Fee Sheet Improvements .....	7
Real-time Eligibility and Benefits – Run Checks Using Saved Filters.....	8
Payment Allocation - Payer Name Added to Payment Allocation Screen .....	9
New Column Added in Payment Allocation - Risk Withhold Amounts.....	10
Reports.....	11
New Column Added in Net Revenue Report - Risk W/Hold Amount .....	11
Case Load by Admit Providers (v2) – New Filter added.....	12
Transactions Report – New Columns and Filters Added.....	13
Telehealth Participants Report .....	14

## Overview

This document contains the Release Notes for September 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.*

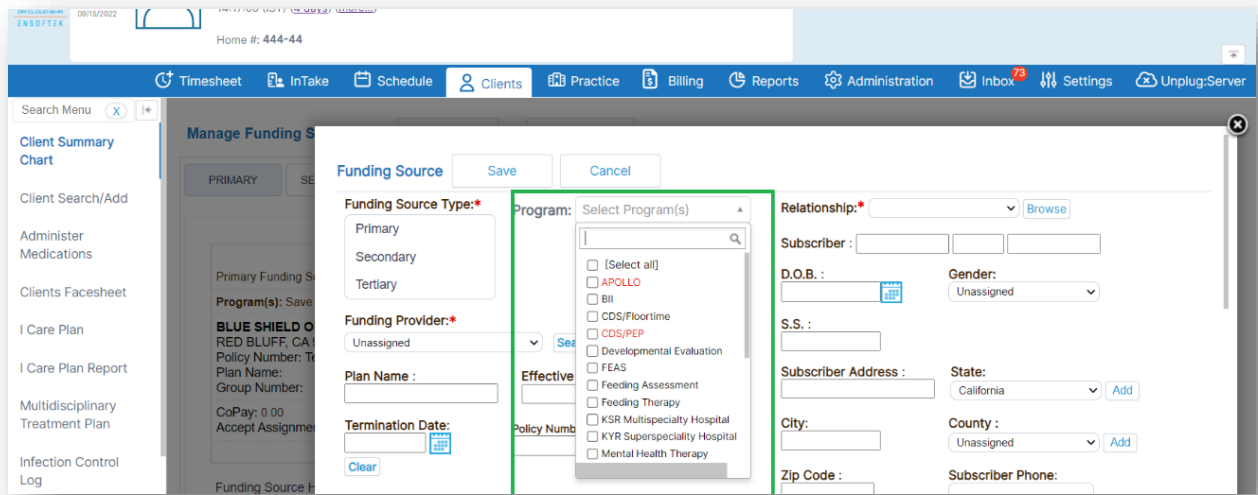
If you have any questions regarding Staging Sites or this Release, don't hesitate to contact our support team at [support@drcloudemr.com](mailto:support@drcloudemr.com).

# Insurance

## Inactive Programs Now Available in Insurance Selection



Authorized users now have the option to select inactive facilities in the **Facility** dropdown when adding new or updating existing insurance information. A list of facilities is displayed with a checkbox so users can select the appropriate facility.



# Practice

## OpenEdge Credit Card Payment Processing – Multiple Account Support

Core Setup

While most agencies have a single account with the payment gateway, some agencies have different accounts based on program/facility/location. This update enables DrCloudEHR customers to configure a facility/program with a credit card processing account of their choosing. Note, Agencies need to work with OpenEdge to set up the appropriate accounts first.

Practice	Access Secret	<input type="text" value="secret"/>
Services	Username	<input type="text" value="drcloud"/> *
Survey Details	Password	<input type="password" value="..."/> *
Target Data +	Request URL	<input type="text" value="https://ws.test.paygateway.com/HostPayService/v1/hostpay/transactions/"/>
Timesheet Settings +	Response URL	<input type="text" value="https://qa-linux-03.drcloudemr.com/dc_ehr_qa/interface/payment_gateway"/>
Upload PDF Forms	Details Request URL	<input type="text" value="https://ws.test.paygateway.com/HostPayService/v1/hostpay/paypage/"/>
Print Encounter Forms	Refund Request URL	<input type="text" value="https://ws.test.paygateway.com/api/v1/transactions"/>
Mapping Applicant Data	Make CVV Optional	<input type="checkbox"/>
	Program	<input type="text"/> * Please select Facility
	Status	<input type="text" value="Active"/>

## Bed Management Improvements to Search

Core

Now authorized users can search for the facility/program in the **Facility** dropdown when adding a Bed record in **Bed Management**. This is especially useful when an agency has a large number of programs/locations.

### Add Bed

Program:  \*

Building:   
Save Nature Clinic

Floor:

Room Number:  \*

Bed Number:  \*

Type:  \*

Gender:  \*

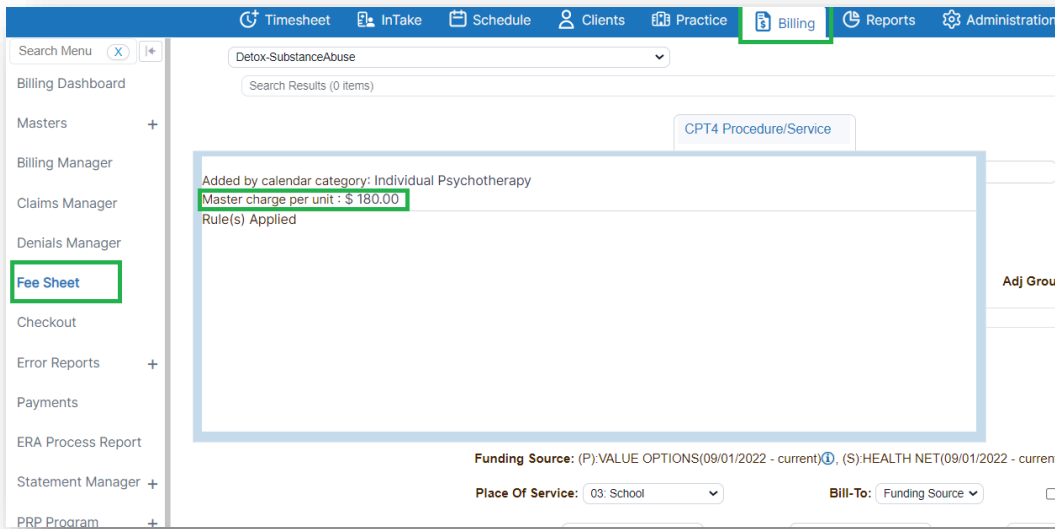
Status:  Active  Inactive

# Billing

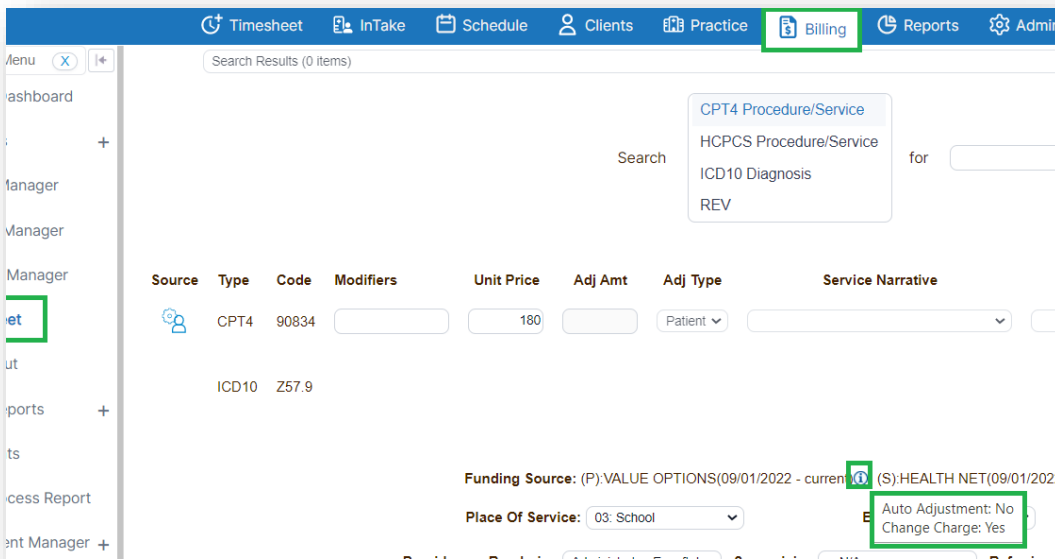
## Fee Sheet Improvements

Core  Setup

**Billing Rule Preview** now shows the **Master Charge** from services as static text so users can see whether charge in **Fee Sheet** is different than the charge from **Master Services List**.



For DrCloudEHR agencies that use the **Contract Manager**, a new visual indicator next to the **Payer Name** in the **Fee Sheet** shows whether the option is set in the payer record to adjust the charge to match the contracted rate or not.



## Real-time Eligibility and Benefits – Run Checks Using Saved Filters

Core Setup

There are two new options in order to make it easier when performing real-time eligibility and benefits checks. Authorized users can find these settings by navigating to Practice -> Administrative -> Practice -> X12 Partner Services.

Batch Remote Download Folder Path

Delete remote files on download

Notify On No Insurance Coverage

Do not alert as chargeable request

Run Saved Filter(s)

Service Name

### Do not notify on chargeable request

- Users now have the option to disable the annoying alert received from the system for a chargeable eligibility request.

### Run saved Filter(s)

- When enabled, authorized users will have the option to run eligibility checks using a saved filter. They can click the green play button icon next to their desired filter on the Saved Filters screen.

Payer(s)	Program(s)	Run Date Appointments Only	Active	Delete	Run
VALUE & OPTIONS medicaid zzzMEDICAID DC zzzVALUE OPTIONS zzzValueOptions® Maryland	123 facility (Mental Health)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
AE&TNA AETN&A ALLEGANT (LBA HEALTH PLANS) AMERIHEALTH CARITAS LOUISIANA ANTHEM BCBS	123 facility (Mental Health) ABH Frederick, Commercial, Office (Mental Health) Advanced Behavioral Health, Inc (Mental Health) Baltimore Office (Mental Health) Frederick Office (AandD)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	



Payment Allocation - Payer Name Added to Payment Allocation Screen

Core

Authorized billing users are now able to see the insurances/payers which are active on the date of payment at the **Payment Allocation** screen.

Client: <input type="text" value="Rani Raj"/> <input type="text" value="1002573"/> <input checked="" type="radio"/> Non Paid <input type="radio"/> Show Primary Complete <input type="radio"/> Show All Tra										
Ins1: N/A Ins2: AETNA (09/05/2022 - until present) Ins3: AETNA (09/01/2022 - until present)										
Post For	Service Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copay	Balance	Allowed	Paym
Pat ▼	09/01/2022	SNC	100171827	Administrator, Ensoftek	90717	200.00	0.00	165	<input type="text"/>	<input type="text"/>
Pat ▼	09/10/2022	SNC	100171828	Administrator, Ensoftek	90379	200.00	0.00	180	<input type="text"/>	<input type="text"/>
Pat ▼	09/12/2022	SNC	100171829	Administrator, Ensoftek	90378	300.00	0.00	280	<input type="text"/>	<input type="text"/>
									0	

## New Column Added in Payment Allocation - Risk Withhold Amounts



The column **Risk W/Hold** has been added on the **Payment Allocations** screen. Authorized users have the option to enter a desired value in this field, when entered this value is used calculate the **Adjustment Amount** as follows:

$$\text{Adjustment Amount} = \text{Charge} - \text{Payment} - \text{Risk W/hold}$$

The **Net Revenue Report** has also been updated to display **Risk W/Hold** value entered during payment allocation.

The screenshot shows the 'Payment Allocations' interface. At the top, there are fields for 'Deposit Date' (24/08/2022) and 'Description' (Raj Hotspot). A red box highlights 'UNDISTRIBUTED: 395'. Below this, summary statistics are shown: 'Total Balance Due: 1,288.00', 'Patient Responsibility: -487.00', and 'Insurance' details for Aetna. A 'Modify Payments' button is visible on the right.

Below the summary, there are filter options: 'Individual:', 'Non Paid', 'Show Primary Complete', and 'Show All Transactions Services: Billable Services'. A table below displays transaction details with a new 'Risk W/hold' column highlighted by a green box.

Post For	Service Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copay	Balance	Allowed	Payment	Capitation	Risk W/hold	Adj Amount	Adj Reason
Pat	25/05/2022	Mental Health	100224665	Kanakanti, Seyon	90792, GT	210.00	0.00	50	5	5		50	155	
Pat	18/07/2022	SNC#123	100224784	ensoftek, Admin	90792, GT	210.00	0.00	210						
Pat	18/07/2022	SNC#123	100224795	ensoftek, Admin	90832	100.00	0.00	86						

# Reports

## New Column Added in Net Revenue Report - Risk W/Hold Amount



The **Net Revenue Report** is updated to display **Risk W/Hold** value entered during payment allocation.

Deposit Date: 24/08/2022    Description: Raj Hotspot    UNDISTRIBUTED: 395

**Total Balance Due: 1,288.00** (Non-Billable Balance: 210.00) (Undistributed Amount: 1,305.00)  
 Patient Responsibility: -487.00    Due from Payer: 1780.00  
**Billing Note:**  
 Individual is insured  
**Insurance :** (P): Aetna (13/04/2022 - until present)  
 (S): None  
 (T): None

New Allocations    Allocated details    [Modify Payments](#)

Individual:      Non Paid     Show Primary Complete     Show All Transactions Services: Billable Services

Post For	Service Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copay	Balance	Allowed	Payment	Capitation	Risk W/hold	Adj Amount	Adj Reason
Pat	25/05/2022	Mental Health	100224665	Kanakanti, Seyon	90792, GT	210.00	0.00	50	5	5		50	155	
Pat	18/07/2022	SNC#123	100224784	ensoftek, Admin	90792, GT	210.00	0.00	210						
Pat	18/07/2022	SNC#123	100224795	ensoftek, Admin	90832	100.00	0.00	86						

## Case Load by Admit Providers (v2) – New Filter added

Core

Authorized users can now search/filter the results in the **Case Load** report by:

- **Admitted** – Only Admitted patients
- **Discharged** – Only Discharged patients
- **All** – Both Admitted and Discharged patients

Report - Case Load By Admit Providers-v2

Date Range From\*: 09/01/2022 To\*: 09/16/2022

Funding Source: Admit Program: Search By:  Admitted  Discharged  All

Select Program(s) Only Admitted patients

Admit Provider:   Details

Manage Column(s)

Records: 12

Program	Provider	Pri Diag Code	First Name	Last Name	Patient status	CareTeam	DOB	PID	External ID	Address	Home Phone	Work Phone
( Total Number of Clients: 1 )												
FEAS			Manuel	Labor	Active		08/03/2003	1002496	1002496	C3-211, Hyderabad, CA, 50005	222- 2222	222- 2222

## Transactions Report – New Columns and Filters Added



The following columns are now available in the **Transactions Report**:

- Insurance Type or Funding Source Type, Place of Service, Contract Amount, Expected Contractual Adjustment, Date of Payment, and Check Number.

Pay Source	POS	Post To Date	Service Code	Date of Payment	Check Number	Charges	Contract Amount	Expected Contractual Adjustment
9.100171866 Patient		09/16/2022	97116	09/16/2022				
9.100171866 Patient		09/16/2022	97116	09/16/2022		110.00		
<b>Transactions Report</b> Encounter (100171866) Total(s)							110.00	
<b>Inventory</b> awualttB eieefivQ bdwkskuX Total(s)							110.00	

Program	Funding Source Type	Patient	Provider	DOS	Invoice	Pay S
Bill						
Bill		awualttB eieefivQ bdwkskuX	Administrator, Ensoftek	09/16/2022	100929.100171866	Patie
Bill		awualttB eieefivQ bdwkskuX	Administrator, Ensoftek	09/16/2022	100929.100171866	Patie
<b>Transactions Report</b>					Encounter (100171866) Total(s)	
<b>Inventory</b>					awualttB eieefivQ bdwkskuX Total(s)	
Bill		Peter K Owt	Administrator, Ensoftek	09/16/2022	1002505.100171847	Patie

The following filters are now available in the **Transactions Report**:

- Date of payment, POS, Check Number, and Insurance Type.

**Report - Transactions**

By: Post To Date | Sort By: Patient |  Suppress the zero balance invoices

From: 09/13/2022 | To: 09/16/2022 | Encounter Program: Select Program(s) | Encounter Provider:

Funding Source: | Service Code: | Encounter Type: All

**Date of Payment:** | **POS:** | **Funding Source Type:** | **Check Number:**

Client: First\_Last(PID/HRN) |  Details

## Telehealth Participants Report



Agencies using DrCloudEHR Telehealth now have a new report available named the **Telehealth Meeting Participants Report**. Clicking on the **Meeting ID** will now display the Telehealth participants' details.

Note:

1. The meeting link on this report is only available once the meeting has been started and ended.
2. The report will only show information for meetings that have ended at least 15 minutes prior to running the report.

The screenshot shows the Ensoftek software interface with the 'Reports' menu item highlighted in the top navigation bar. On the left sidebar, 'Telehealth Meetings' is also highlighted. The main content area displays the 'Telehealth Meeting Participants Report' for Meeting ID: 94853655491. The report details include: Topic: Individual Psychotherapy, Host: BalaKishore Reddy, Start Time: 08/30/2022 10:30:53, End Time: 08/30/2022 10:37:19, Duration: 7 (in mins), and Participants: 2.

Participant Name	Participant Email	Join Time	Leave Time	Duration	In Waiting Room
BalaKishore Reddy	bk.qa@drcloudemr.com	08/30/2022 10:30:53	08/30/2022 10:37:19	386	No
Dora Reddy		08/30/2022 10:31:45	08/30/2022 10:31:50	5	Yes
Dora Reddy		08/30/2022 10:31:50	08/30/2022 10:37:18	328	No