



**ensoftek**<sup>®</sup>

DrCloudEHR<sup>™</sup>  
September 2024 Release Notes

Release to Staging Site – August 25, 2024

Release to Production Site – September 1, 2024

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## Overview

This document contains the Release Notes for September 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:



**Core**

Available to all users when released



**Add-on**

Dependent on the activation of other feature(s)



**Setup**

Some setup is required after the 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 feature.

If you have questions regarding staging sites or this release, please contact our support team at [support@drcloudemr.com](mailto:support@drcloudemr.com).

# Practice

## Ability to duplicate calendar categories or encounter templates

Core  Setup

Implemented a new "Save As" button to duplicate calendar categories. Clicking Save as opens a new page displaying all the settings for the category data except for the Name. The user can enter a different Category Name and save it.

Name	Type	Description	All Day	Duration	Code(s)	Facility	Provider	Workflow	TeleHealth	Billable	Action
<a href="#">Adolescent</a>	Client		No	1Hr 0Mins	CPT4:90837	The Northwest Catholic Counseling Center Therapy - Holy Cross Therapy - Levantar Therapy - Mandarin		Clinical Progress Note	No	Yes	Save As
<a href="#">Adolescent New</a>	Client		No	1Hr 0Mins	CPT4:90791	The Northwest Catholic Counseling Center Therapy - Holy Cross Therapy - Levantar Therapy - Mandarin		First Session Forms - Adult	No	Yes	Save As
<a href="#">Adult</a>	Client		No	1Hr 0Mins	CPT4:90837	The Northwest Catholic Counseling Center Therapy - Levantar Therapy - Mandarin		Clinical Progress Note	No	Yes	Save As
<a href="#">Adult New</a>	Client		No	1Hr 0Mins	CPT4:90791	The Northwest Catholic Counseling Center Therapy - Levantar Therapy - Mandarin		First Session Forms - Adult	No	Yes	Save As

## Get Notified when a Televox Appointment Reminder Upload fails

Core  Setup

A new global setting "Notify when appointments reminder cron fail" now enables administrators to configure the user group to alert when the Cron Job "Clienttell/Intrado " fails to upload appointment reminder files.

Setting	Value
Enable Clienttell Cancelled Appointments Report	<input checked="" type="checkbox"/>
Send Provider Username instead of Name in appointment reminders file	<input checked="" type="checkbox"/>
Send Telehealth link instead of Location Address in appointment reminders file	<input checked="" type="checkbox"/>
Do not send Patient Cell Phone in appointment reminders file	<input type="checkbox"/>
Apply Housecallspro cancellation for appointments with Status	Scheduled
Notify when appointments reminder cron fail	Auditor Clinic Admin

## Ability to customize Printed Labels

Core Setup

**Lab Account Number:** When the global flag for "Hide the Lab Account Number" is enabled in the Facility Master, the lab account number will be hidden under Facilities -> Billing Tab.

- However, it will be available under Provider -> Add New -> Add New Procedure Provider, where multiple lab account numbers can be added.

### Lab Order Page:

- **Account Field** -> The current "Account" text box has been replaced with a dropdown menu.

Lab Order for Lap Drc 2024 on 09/08/2024

Client DOB: 22/02/2002 Patient SSN: XXX-XX-1298

Ordering Provider:	Sairam Rayavarapu
Sending To:	SandalWood Labs
Account:	2021722673
Order Date:	-- Select --
Status:	1203210298
Patient Visit Status:	Inpatient
Identification:	ABCD1234EFGH
Collector:	Sai Ram Rayavarapu
Order Comments:	

### Label Modification:

- **Label Header:** The header on printed labels has been updated.
- **Requisition Number:** The manual entry for the requisition number has been changed to generate an automatic number.
- **Test Names:** Previously, test names were printed. This has been updated to allow multiple orders and print codes for each order, separated by commas, displayed side by side.
- **Collector Field:** A new collector field with a blank line for input has been added.
- **Label Footer:** A "Chain of Custody" section with a blank line has been added to the label.

**Save Nature Clinic**

Specimen Date: 16/08/2024 12:00:00 AM  
 Requisition: 100004  
 PID: 1003392  
 Account Number: 2021722673  
 Collector: \_\_\_\_\_  
 Tests: 81331,CPT 81001,CPT 85025

**Chain of Custody**

Date	Initials	Comments
_____	_____	_____

# Patients

## Updates to Progress Note and ROI forms

Core  Setup

Implemented the following functionality in Progress Note, MH Progress Note, and Mental Health ROI forms.

### Progress Note and MH Progress Note:

- The "Type of Contact" field is now linked to the "Type of Contact lists" found under Lists -> Administration.
- When the "Other" option is selected on the form, a text box appears, allowing clinicians to enter the relevant data mentioned below the screenshot.

### Mental Health ROI Form:

- A global flag has been implemented. When enabled, this flag adds an "Initials" column and a "Witness Signature" field to the form.

# Billing

## New Claims Manager Filters to identify who created or submitted a claim

Core  Setup

Added new filters to Claims Manager to search claims that were created/submitted or resubmitted one or more claims. 3 options are provided:

User who submitted the claim(s) -> claims that are submitted, printed or downloaded by the user.

User who created the claim(s) -> claims that are created/generated by the selected user.

User who re-submitted the claim(s) -> claims that are re-submitted by the selected user.

The screenshot shows the 'Claims Manager - Search' interface with three main sections:

- 1. Available Search Criteria:** A list of filter options including 'Settlement Status', 'Supervising Provider', 'User who created the claim(s)', 'User who re-submitted the claim(s)', 'User who submitted the claim(s)', and 'X12 Partner'. The three user-related options are highlighted with a green box.
- 2. Value:** A dropdown menu labeled 'User who created the claim(s)' with 'John Clinician' selected.
- 3. Review Current Criteria:** A summary box showing 'User who created the claim(s) = John Clinician'.