



DR CLOUD EHR

ENSOFTTEK

User Appreciation Day

June 24, 2021



DrCloudEHR Team



Sandy Black

Customer Success Manager

Welcome
Q&A Coordination



Murray Heidebrecht

Director of Marketing

Moderator



Ramesh Nagul

CTO, VP of Engineering

Product Roadmap
Feature Demo



Chris Goodbaudy

Implementation

Feature Demos

Agenda

- Welcome & Introductions
- Development Overview
- Feature Overview & Demos
- Questions & Answers
- Next Steps for DrCloudEHR User Appreciation Events

Our Commitment to You

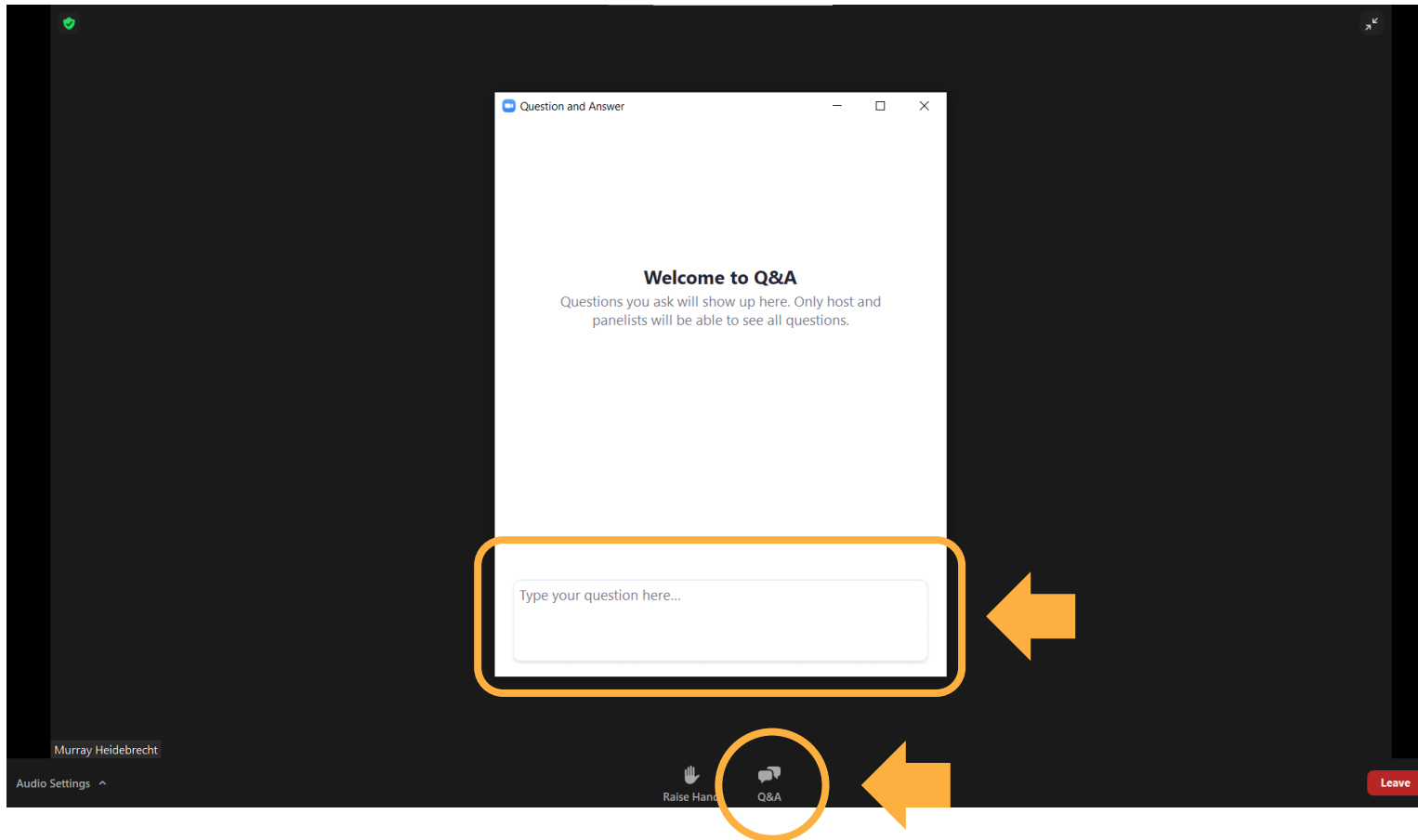
Express our appreciation to you

Provide a platform for engagement





Incorporate your feedback into DrCloudEHR

Provide responses to all your questions

Questions & Answers



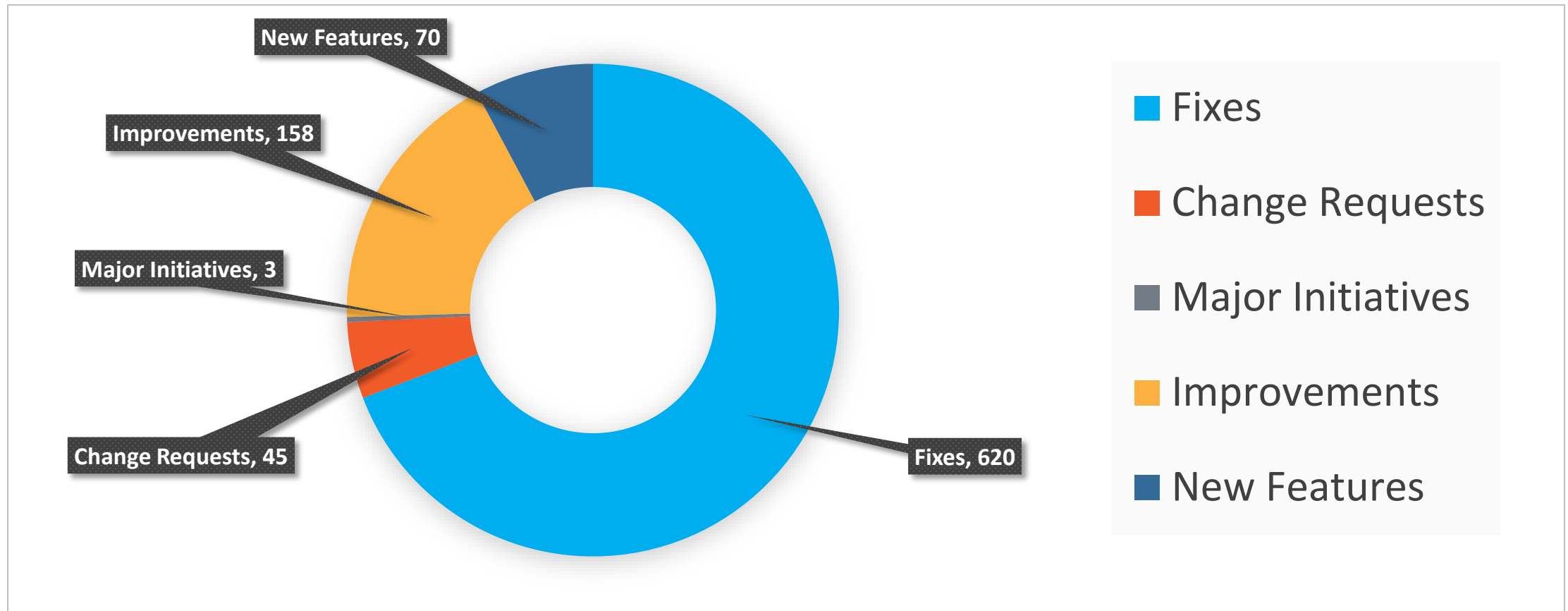
Tags at a Glance

-  **Core** Feature available to all users when released
-  **Add-on** Dependent on activation of other feature(s)
-  **Add-on** Requires purchase and additional setup
-  **Setup** Some setup is required

Development Overview

Ramesh Nagul

896 Deployed Improvements – Past 12 Months



DrCloudEHR 2021-22 Roadmap Highlights

Feature	NEXT PLANNED RELEASE		
	Q3 – 2021	Q4 – 2021	2022
UI/UX Refresh	●		
Improvements to User Workflow	●		
Patient Portal Workflow Enhancements	●		
MMIS Eligibility Checks	●		
Billing Improvements	●	●	
Telehealth 3.0	●	●	
Case Management 2.0			●
Foster Care Module 1.0			●
Tablet App Support (iPad/Android) 1.0			●
ERP/CRM Integration			●

Feature Overview & Demos

Interactive Reports & Analytics

New Feature Demo

Ramesh Nagul

New Interactive Reports & Analytics



Add-on



Setup



Dec 2020

DrCloudEHR integrates with Power BI to provide insights into practice data with new interactive, graphical analytics reports. Available reports include:

- Executive summary of patients served, units rendered, patients by funding source, and billable amounts based on date and time.
- Expected revenue by insurance type, insurance company, facility, provider, or patient.
- Billable units by insurance type, insurance company, facility, provider, or patient.
- Patient visit counts by payor type, payor, facility, provider, or patient.
- Accounts Receivable based on aging (days past due).
- Use Power BI Desktop to design build reports to add to DrCloudEHR using the Power BI Desktop tool.

Patient Search

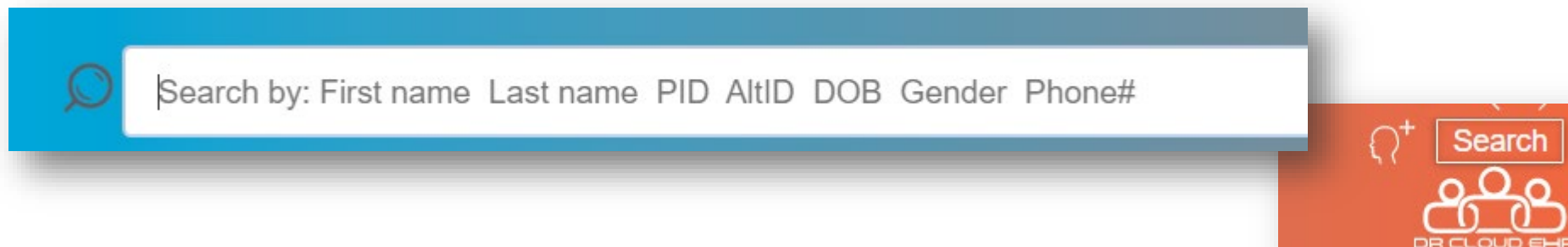
New Feature Demo

Chris Goodbaudy

Enhanced Patient Search

 **Core**  **Setup**  **Oct 2020**

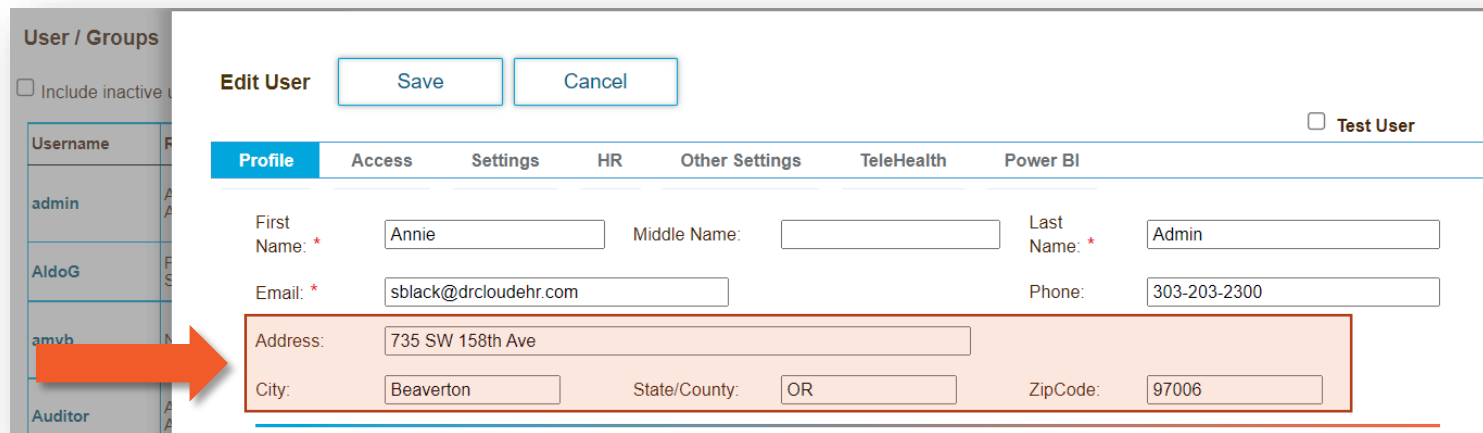
- You can now enter multiple search terms in the patient search box to refine your queries. For example, you could type “Smith male” in the search box to retrieve a list of male patients with the last name Smith.



Add Address Details to a User's Profile

 **Core**  **Setup**  **Oct 2020**

- You can now enter a DrCloudEHR user's address, city, state, county, and zip code data in the Profile tab under Users.



User / Groups

Include inactive

Username	First Name	Last Name
admin	A	A
AldoG	E	S
amvb	N	A
Auditor	A	A

Edit User Test User

Profile | Access | Settings | HR | Other Settings | TeleHealth | Power BI

First Name: * Middle Name: Last Name: *

Email: * Phone:

Address:

City: State/County: ZipCode:

Referral & Expedited Admission

New Feature Demo

Chris Goodbaudy

Referral Source Tracking & Management

 Add-on  Setup  Dec 2020

- You can now create a separate referrals link to provide to each referral source you want to receive referrals from.
- Incoming referrals can be sent to you via a web based referral form.
- The incoming referrals can be setup to trigger notifications to specified users or groups.
- Referred patients end up in your wait list/applicant area to process like you would all of your other patients waiting to enter services.

Expedited Patient Admission Process

 **Core**  **Setup**  **Oct 2020**

- You can now skip the applicant approval process and add a patient directly from the Add Applicant page.

Create Resident Request

Would you like to create resident for this applicant?

Click Yes to save the applicant and create a resident.
Click No to save the applicant.

Calendar

New Feature Demo

Chris Goodbaudy

Calendar Updates



Core



Setup



Oct 2020



Dec 2020

- **Click on an empty calendar block to add an appointment**
- **Drag and drop appointments on your calendar to reschedule**
- **Export appointments to Microsoft Outlook**
- **You can change the default calendar view to display appointments by day, month, week, or daily agenda.**
- **When a capacity is defined for a group, the application displays the capacity in the group appointment details.**
- **Allocate rooms for the appointment**
- **Read more about these new features here:**
[Managing Appointments](#)

Patient Portal

New Feature Demo

Chris Goodbaudy

Patient Portal Enhancements

 Add-on  Setup  Oct 2020  Dec 2020

We've enhanced security and usability in the Patient Portal.

- When a patient attempts to log in to the portal, and another patient with the same name exists in the system, the application prompts for additional authentication before granting access.
- View and check in for an appointment that is scheduled today.
- View past appointments.
- View upcoming appointments, with an option to export appointment details to Microsoft Outlook.
- The Patient Portal also includes an After Visit Summary page with information useful to the patient, such as the patient's vitals, a list of procedure orders and results, a list of medications, and upcoming appointments.
- Patients can now view and generate their billing statements from the portal.
- Patients can save their e-signature and password so they can digitally sign forms through the portal.

Debit & Credit Card Enhancements

 **Add-on**  **Setup**  **Oct 2020**

- We've added support to allow patients to use a debit card to pay for services.
- If you accept credit card payments, we've added an option to reuse a credit card. You can also add any relevant notes.

Billing (collapse)

Total Balance Due: 23,272.50 (Non-Billable Balance: 2,000.00) (Undistributed Amount: 100.00)

Patient Responsibility: 395.00 Due from Payer: 20112.50

Patient is insured

[Payments](#) [Receipts](#) | [Statement](#) | [Prior Authorization](#) | [New Payment](#) | [Credit cards on file](#)



Edit Published Form Builder Forms

 **Core**  **Setup**  **Oct 2020**

- Edit Published Forms – You can now add fields to a published form created using the Form Builder tool.
 - Notes:
 - You cannot delete or edit any existing fields on the published form when editing
 - You can add new fields to the end of the form
 - You can change the signature permissions settings

Golden Thread Rule Updates

Step 3: How often must the form(s) be done

Frequency: At every visit Custom: Other: Per Patient:

Every , Reminder: day(s)

From:

Step 4: When Rule Fails

Message:

Block billed

Who should be notified?

Notify Admit Provider

Notify Admit Provider's Supervisor

Notify Admit Provider's Other Supervisors

Notify Care Team

Golden Thread Rule® Updates

 **Core**  **Setup**  **Dec 2020**

- Configure a Golden Thread rule to require that a form be completed every day, instead of every week.
- You can also configure the system to send Golden Thread rule alerts to the care team members and the staff member who either created the form, or is editing the form, in addition to the admitting provider or supervisor.
- You can now define form completion criteria for the New Encounter Form.

Accounting Period & General Ledger Demo

New Feature Demo

Chris Goodbaudy

Use Accounting Periods to Manage Transaction Data

 **Core**  **Setup**  **Oct 2020**

- We've added support for accounting periods, which are the date ranges during which transactions are performed. In DrCloudEHR, each month of the year constitutes an accounting period. You can create an accounting period for a specific month, or you can create accounting periods for multiple months in a selected year.
- Read more about this new feature here: [Managing Accounting Periods](#)

Export Billing & Payment Data to import into Your General Ledger software



Core



Setup



Oct 2020

- DrCloudEHR now supports exporting data to GL software. This feature works in conjunction with the Accounting Period feature to prevent data import issues.

Read more about this new feature here: [Exporting Billing and Payment Data to Your General Ledger System](#)

Include or Exclude Non-billable Codes in Statements



Core



Setup



Oct 2020

- You can now specify whether to include non-billable codes in the Invoice Details page, in the Statement page, and in statements. If you decide to include non-billable codes, they are shown in separate sections in pages and statements. This is a setting for the entire agency.

Include Non Billable services in patient statements



Report Updates

 **Core**  **Setup**  **Oct 2020**

- The Unapplied Cash Report includes payments received from insurance payers that have not yet been allocated. You can search for Unapplied payments by Client or Insurance.





Report - Unapplied Cash

Patient Unapplied Insurance Unapplied

Insurance:

Payment Facility:

Deposit Month: Year:

Deposit date From:  Deposit date To: 

 **Add-on**  **Setup**  **Oct 2020**

- You can now filter data in the Collections/Aging Report based on the accounting period you want.

Insurance Update Process

New Feature Demo

Enhanced Workflow Support for Patient Insurance Changes



Core



Setup



Oct 2020

- When a patient changes their insurance coverage, DrCloudEHR notifies you that claims may exist in the system that are pending against the patient's former insurance. You can now choose to update the affected encounters with this new insurance information, reapply any applicable billing rules and reprocess (submit) the claims.

Fax and Label Improvements

 **Add-on**  **Setup**  **Oct 2020**

- We've upgraded the Fax Center to support multiple incoming and outgoing fax numbers for a specific facility.
- You can now attach an incoming fax to a specific patient's documents.

Add Prescription Orders to the Electronic Medication Administration Record (eMAR)



Add-on



Setup



Dec 2020

- When a prescription is ordered from an external pharmacy using the DrFirst Rcopia application, the prescription is automatically synced to the ChartMeds electronic Medication Administration Record (eMAR) as a pending medication awaiting prescriber approval. This means that you no longer need to manually add the prescription to the MAR.

Needs-based Treatment Planning

New Feature Demo

Chris Goodbaudy

Needs-based Treatment Planning



Core



Setup



Dec 2020

- You can now record a list of needs or problems identified for a patient to track whether a need(s) has been addressed during treatment.
- The Needs list is also displayed in the Patient Summary Chart page for clinical staff's convenience
- Needs are also integrated into the Multidisciplinary Treatment Plan for easy treatment planning
- Needs can be added to Form Builder encounter forms.

New Forms

 **Core**  **Setup**  **Oct 2020**

We've added two new patient encounter forms :

- Individualized Family Service Plan
- Activity Plan / Progress Note

Additional Enhancements

 **Core**  **Setup**  **Dec 2020**

Here are a few more usability improvements we've made:

- You can add users to the new “Authorize waitlist delete” access control list, which enables you to delete a wait list request from the Wait List Dashboard page.
- You can search for a facility from the Facilities page.
- You can click the new “Log Treatment Time” button in the fee sheet for an encounter to directly access the Encounter Forms Log Time page.

Questions & Answers

Murray Heidebrecht

Wrap up

- Q&A Process
- Future User Community Events
- Next week
 - Uber Eats \$20 Gift Code
 - Webinar Feedback Survey
 - Webinar recording
 - Q&A Answers

thank you