DrCloudEHR™ Release Notes

May 1, 2022

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Table of Contents

Overview

This document contains the Release Notes for May 1, 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	Add-on
Available to all users when released	Dependent on the activation of other feature(s)
Setup	**Add-on**
Some setup is required after release	Requires purchase and additional setup

If you have any questions regarding the updates, how they may affect your workflows or general comments on the Release Notes, please reach out to our team. We are happy to assist you!

Updates available on Staging Sites: April 24, 2022

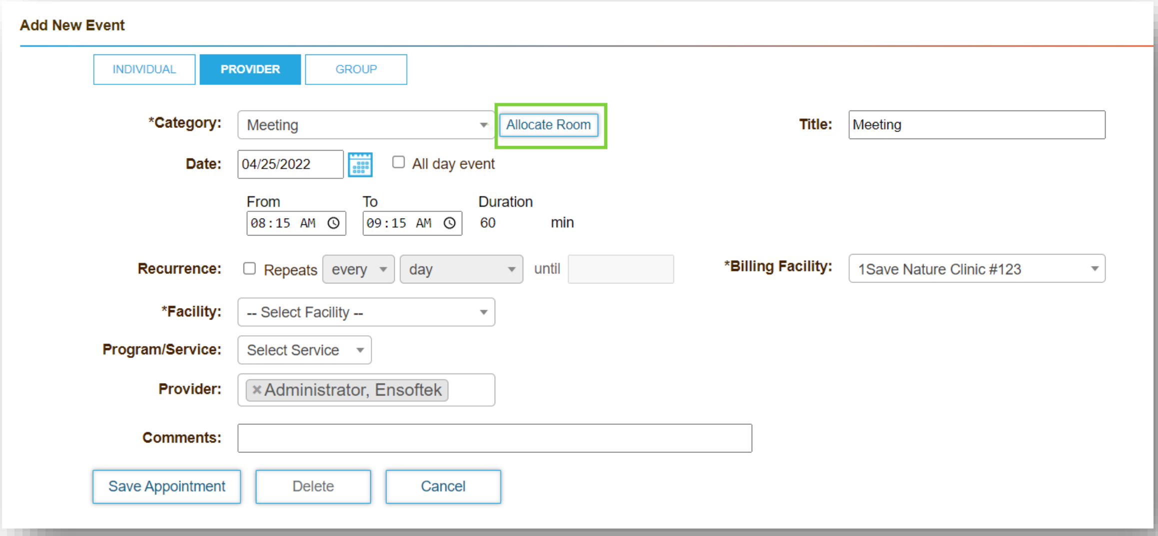
Updates in Production: May 1, 2022

Schedule

Add Option to Allocate a Room for Provider Appointments

Core Setup

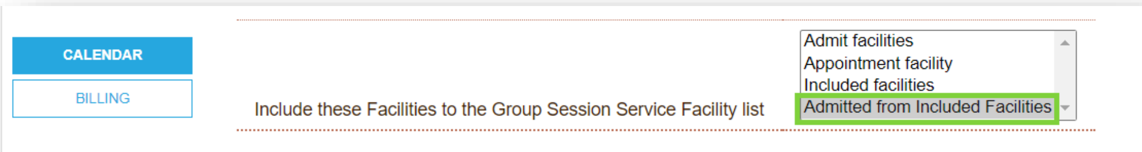
When creating a new provider **Event**, users now have the option to allocate a room. Once activated, the option will appear as a button next to the **Category** field.

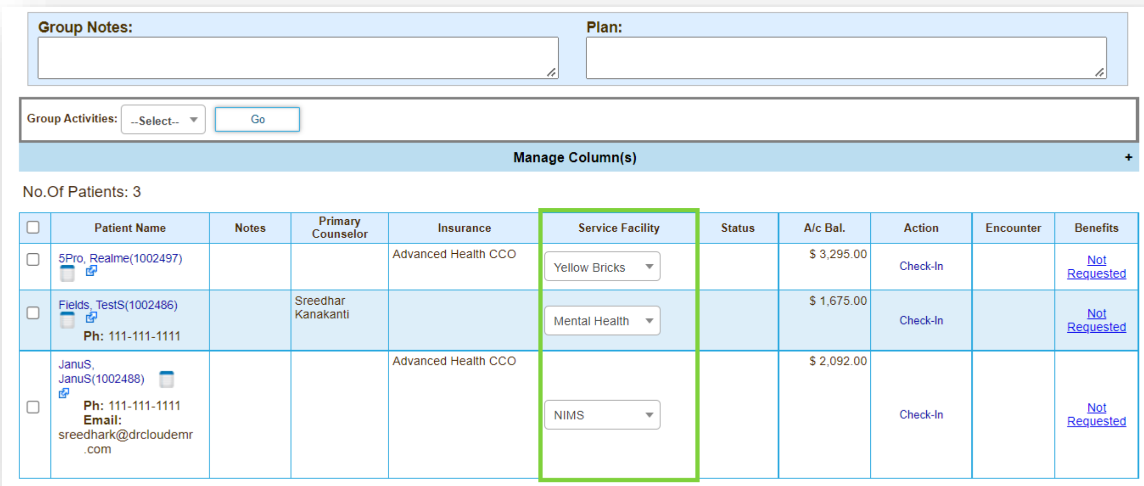


Add Option to Display Admitted Facilities in Group Events

Core **Setup**

Users can now change the chosen facility within a **Group Event** before the client has been checked in. After this option is enabled, it will appear in the **Service Facility** dropdown list as **Admitted Facilities from Included Facilities** when creating/viewing a **Group Event**. Once the client has been checked in, the selected facility cannot be changed.





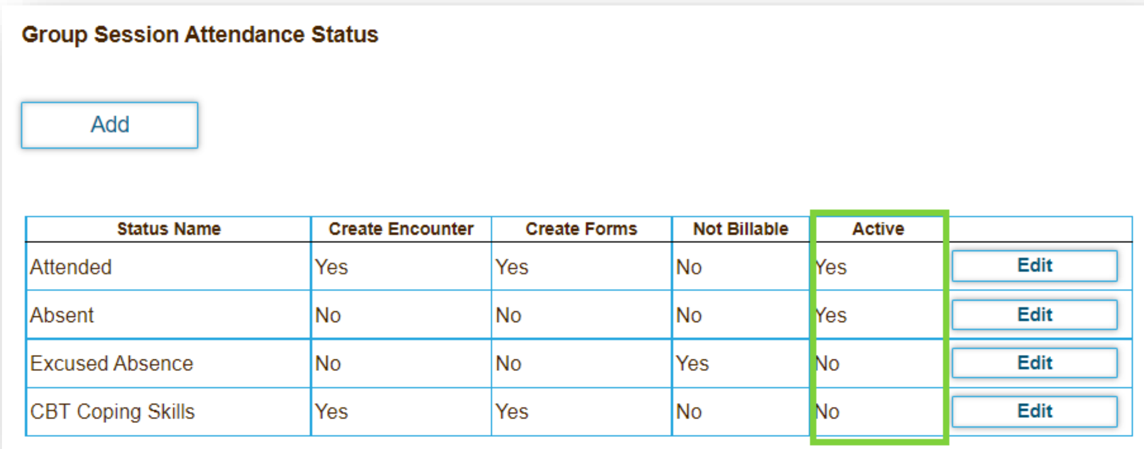
	Patient Name	Notes	Primary Counselor	Insurance	Service Facility	Status	A/c Bal.	Action	Encounter	Benefits
	5Pro, Realme(1002497)			Advanced Health CCO	Yellow Bricks		$ 3,295.00	Check-In		Not Requested
	Fields, TestS(1002486) Ph: 111-111-1111		Sreedhar Kanakanti		Mental Health		$ 1,675.00	Check-In		Not Requested
	JanuS, JanuS(1002488) Ph: 111-111-1111 Email: sreedhark@drcloudemr.com			Advanced Health CCO	NIMS		$ 2,092.00	Check-In		Not Requested

Removed ‘Excused Absence’ Status Option in a Group Event

☑ Core

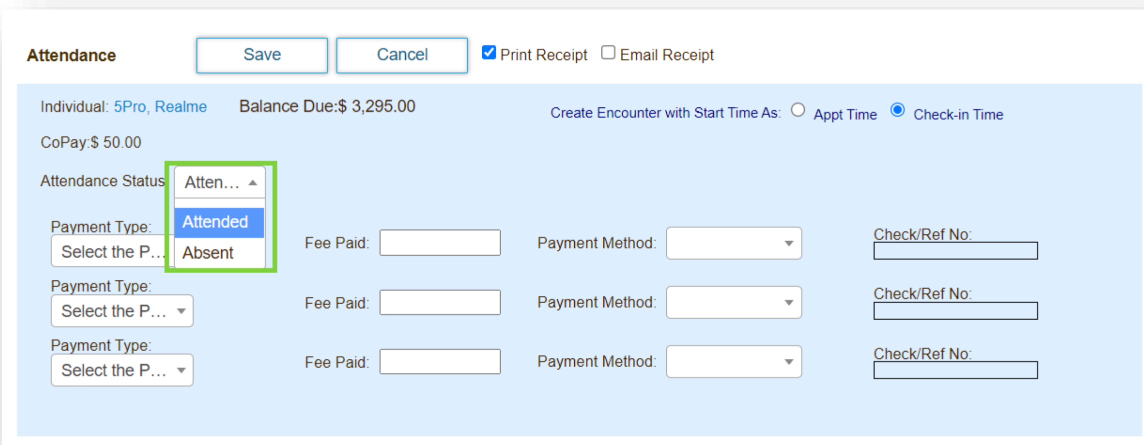
When viewing a **Group Session**, the option to change the status of the attendees to **Excused Absence** has been removed to prevent accidental selection.

To Manage Group Session Attendance Status: Practice → Administrative → Group Session Attendance Status page


Group Session Attendance Status

Add

Status Name	Create Encounter	Create Forms	Not Billable	Active	
Attended	Yes	Yes	No	Yes	Edit
Absent	No	No	No	Yes	Edit
Excused Absence	No	No	Yes	No	Edit
CBT Coping Skills	Yes	Yes	No	No	Edit



Clients

Manage Access to the 'Close Encounter' Privilege

Core Setup

When the ACL **Disable Close Encounter Access** is enabled for the user group, they will not have access to the **Close Encounter** button on the following pages:

- Encounter Summary
- Fee Sheet
- Group Appointment
- Batch Closing Encounters

Additional Functionality for Long-Term Care Facilities

Core Setup

If **Long-Term Care** was configured as the global **Type of Care** for your organization, there are now additional functions that can be enabled:

- Close Encounter
- Log Treatment Time

Removed Access to Certain Actions for Clients Marked 'Deceased'

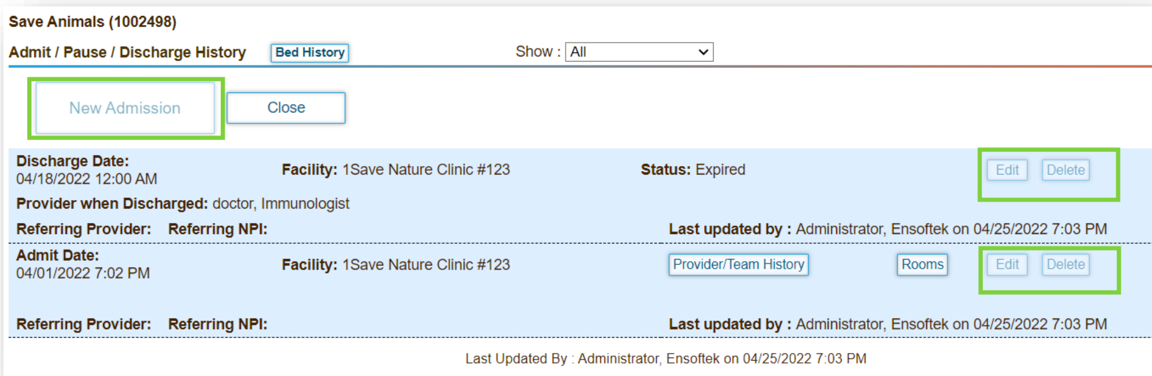
Core

If a client is marked **Deceased**, the following admit actions will be disabled:

- New Admission, Edit, and Delete

If a user enters the **Deceased Date** prior to **Admit Date**, the following notification will be displayed:

"Deceased Date/Room Allocation Date should not be less than Admit Date!"



Manage Access to the 'Allow Delete Medication' Privilege

Core Setup

When the ACL **Allow Delete Medication** is enabled for a user group, they will have access to the **Delete Medication** button.

Note: The user group **Medical/History ACL** has this option enabled by default.

Medical Diagnoses are now Associated with a Facility

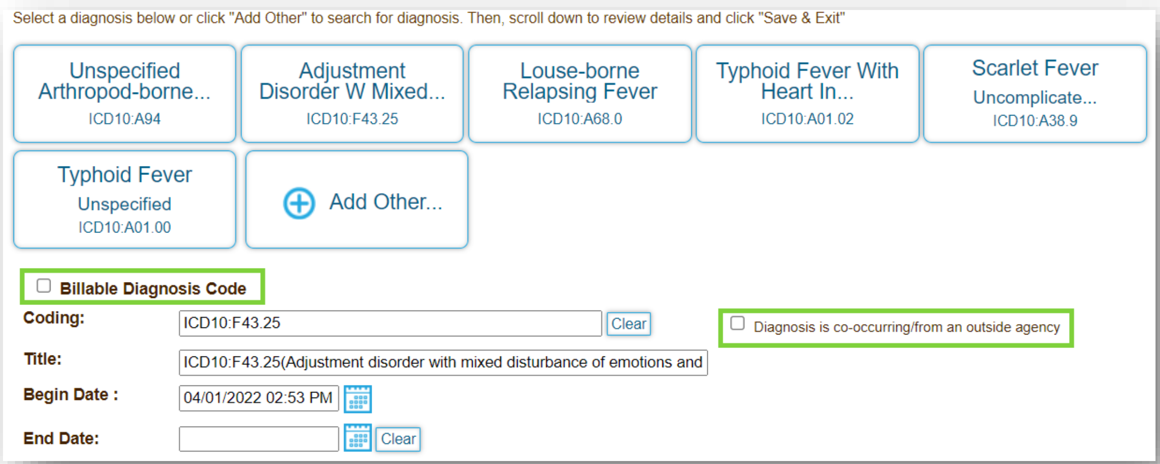
Core

Medical diagnosis information is now associated with the facility in which the diagnosis was made, resulting in the ability to view or change a previously established diagnosis at a different facility.

Added Option to Indicate if a Diagnosis is Billable using Precedence

Core Setup

When using the **Precedence** feature, there is now the option to indicate whether a diagnosis is billable. If selected as billable, the diagnosis will be displayed on the statement, regardless of precedence.



Removed Empty/Unused Fields when Using the Legacy Search Feature

Core

When using the Legacy Search option via the dropdown menu, the search results will no longer display fields that have been set to 'Hidden.' If a field has no value, it will not be displayed in the results.

Changed the Destination of Client-Related Notifications

Core

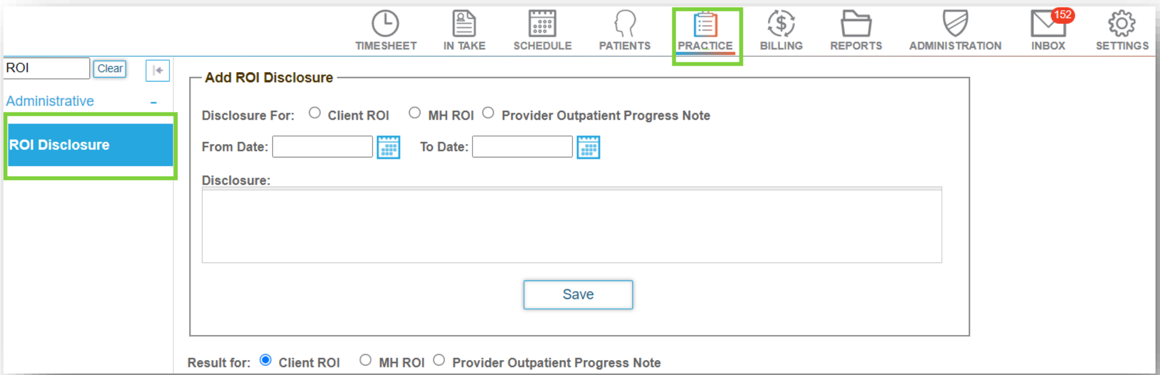
When a user receives a notification from a client (i.e., a message from the client, a client completed a form, etc.), the notification will now be displayed in the Client Inbox rather than in the user's general Inbox.

Added Interface to Manage Disclosure Content for ROI Forms

Core   Setup

There is now an interface to define/customize the disclosure content for the **Client ROI** and **MH ROI** forms separately. Any changes made may be periodically defined. However, changes will not affect older versions of these forms.

To Manage: Practice → Administrative → ROI Disclosure



Added a Fully Customizable A&D Assessment Form

Core

Using the **Form Builder**, we developed a customizable version of the **A&D Assessment**, allowing the option to edit the form as needed. This form is titled **A&D Assessment V2** and is fully customizable.

Added the Body Surface Area Field to Vitals Section

Core   Setup

There is now the option to add the **Body Surface Area (SqMts)** field into the Vitals section of a client's chart.

Added Optional Client Demographics Sections for the Patient Portal

Core Setup

When viewing a patient’s demographic information in the **Client Summary Chart**, there are now additional fields that can be added or removed. Conveniently, the following fields can now be enabled or disabled:

- Advanced Directives
- Clinical Reminders
- Golden Thread Alerts
- Medications
- Medical Problems
- Allergies
- Appointment Reminders
- Surgeries
- Dental Issues
- Non-Mediaion Orders
- Cognitive Status
- ID Card Photos

Added Additional Information to the Summary of a Closed Encounter

Core Setup

When a user closes an **Encounter**, a Global Flag Setting enables a pop-up including the **Diagnosis Summary** and the **Service Summary**. When enabled, this is what will be displayed:

Diagnosis Summary:

Diagnosis Code	Description
ICD10:F43.25	Adjustment disorder with mixed disturbance of emotions and conduct
ICD10:A01.00	Typhoid fever, unspecified

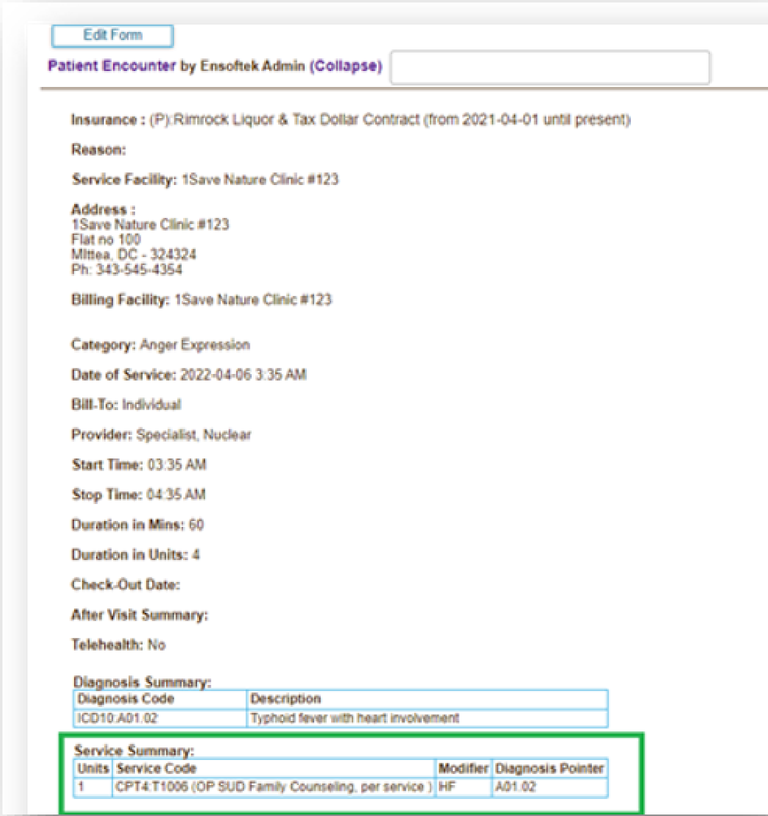
Service Summary:

Units	Service Code	Modifier	Diagnosis Pointer
1	CPT4:90791 (Assessment (MH, SUD Private), per session)		F43.25
1	CPT4:90840 (MH Psychotherapy for Crisis, each additional 30 min)		A01.00

Added Service Summary Section to the Patient Encounter View

Core

When viewing a **Patient Encounter** form in an **Encounter**, the **Service Summary** section is now visible below the **Diagnosis Summary** section.


Edit Form

Patient Encounter by Ensoftek Admin (Collapse)

Insurance : (P):Rimrock Liquor & Tax Dollar Contract (from 2021-04-01 until present)

Reason:

Service Facility: 1Save Nature Clinic #123

Address :
1Save Nature Clinic #123
Flat no 100
Mittea, DC - 324324
Ph: 343-545-4354

Billing Facility: 1Save Nature Clinic #123

Category: Anger Expression

Date of Service: 2022-04-06 3:35 AM

Bill-To: Individual

Provider: Specialist, Nuclear

Start Time: 03:35 AM

Stop Time: 04:35 AM

Duration in Mins: 60

Duration in Units: 4

Check-Out Date:

After Visit Summary:

Telehealth: No

Diagnosis Summary:

Diagnosis Code	Description
ICD10:A01.02	Typhoid fever with heart involvement

Service Summary:

Units	Service Code	Modifier	Diagnosis Pointer
1	CPT4:T1006 (OP SUD Family Counseling, per service)	HF	A01.02

Made Various Adjustments to Billing Notes

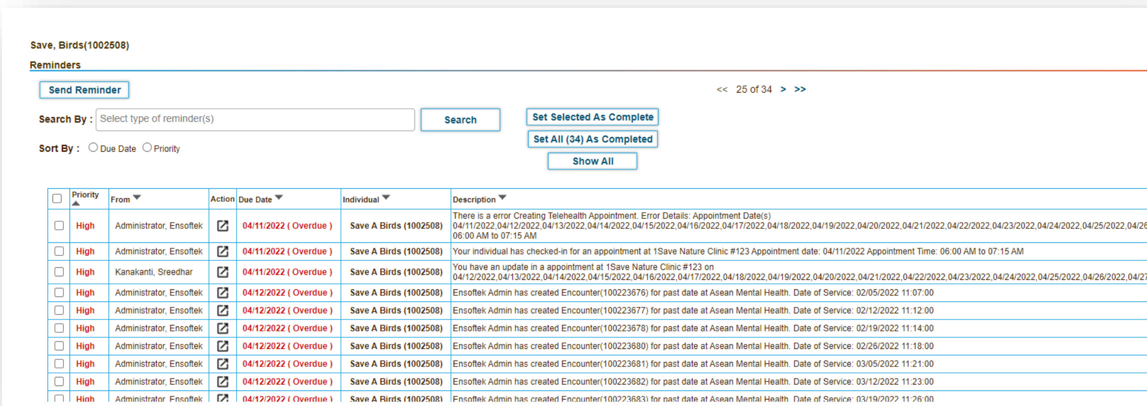
Core

- Removed the option to enter **Billing Notes** from the **Client Demographics** section of the **Client Summary Chart**.
- Added the option to enter **Billing Notes** via the **Billing** link in the **Client Demographics** section of the **Client Summary Chart**.
- Text from the **In Collections** field will be displayed if a client is sent to **Collections** in the **Collections Report.**
- **Billing Notes** are displayed at the places where there is a client search.

Changed the Destination of the 'Click here to see all Reminders' Link

Core

Selecting the link **Click here to see all Reminders** at the bottom of the **Inbox Reminders** section in the **Client Summary Chart** will display all reminders related to the selected client.



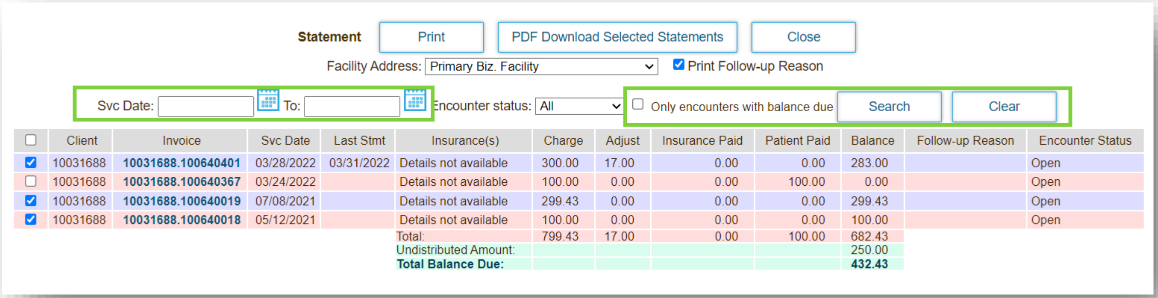
Added Additional Filters to the Statements Page

☑ **Core**

When searching for Encounters through the Statements page, users now have access to additional filters to search:

- Date Range
- Only encounters with a balance due

There is also an option to save the filter and set it as the default.



☐	Client	Invoice	Svc Date	Last Stmt	Insurance(s)	Charge	Adjust	Insurance Paid	Patient Paid	Balance	Follow-up Reason	Encounter Status
☑	10031688	10031688.100640401	03/28/2022	03/31/2022	Details not available	300.00	17.00	0.00	0.00	283.00		Open
☐	10031688	10031688.100640367	03/24/2022		Details not available	100.00	0.00	0.00	100.00	0.00		Open
☑	10031688	10031688.100640019	07/08/2021		Details not available	299.43	0.00	0.00	0.00	299.43		Open
☑	10031688	10031688.100640018	05/12/2021		Details not available	100.00	0.00	0.00	0.00	100.00		Open
					Total:	799.43	17.00	0.00	100.00	682.43		
					Undistributed Amount:					250.00		
					Total Balance Due:					**432.43**		

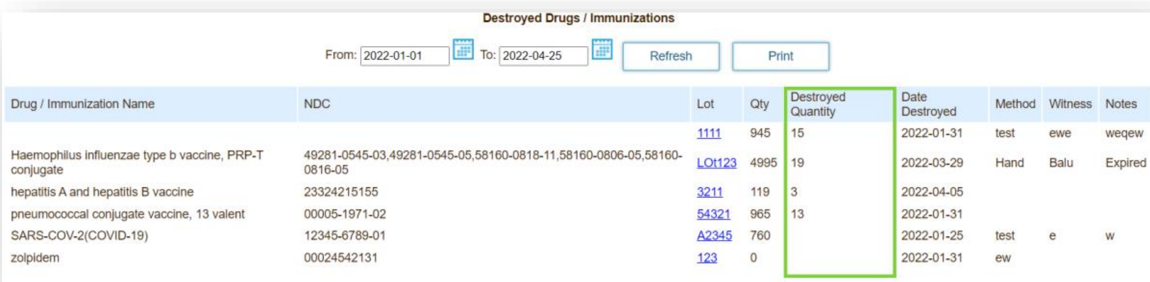
Practice

Added Column to Display Number of Destroyed Drugs/Vaccines

☑ Core

When viewing the **Destroyed Drugs/Immunizations** page, there is now a column to represent the quantity of Drugs or Vaccines that have been destroyed.

Additionally, the value of the **Destroyed Quantity** field will be deducted from the value of the total quantity (**Qty** field).


Destroyed Drugs / Immunizations

From: 2022-01-01 To: 2022-04-25 Refresh Print

Drug / Immunization Name	NDC	Lot	Qty	Destroyed Quantity	Date Destroyed	Method	Witness	Notes
		1111	945	15	2022-01-31	test	ewe	weqew
Haemophilus influenzae type b vaccine, PRP-T conjugate	49281-0545-03,49281-0545-05,58160-0818-11,58160-0806-05,58160-0816-05	LOt123	4995	19	2022-03-29	Hand	Balu	Expired
hepatitis A and hepatitis B vaccine	23324215155	3211	119	3	2022-04-05			
pneumococcal conjugate vaccine, 13 valent	00005-1971-02	54321	965	13	2022-01-31			
SARS-COV-2(COVID-19)	12345-6789-01	A2345	760		2022-01-25	test	e	w
zolpidem	00024542131	123	0		2022-01-31	ew		

Added Ability to Remove Admitted or Non-Admitted Patient(s) from the Wait List Dashboard

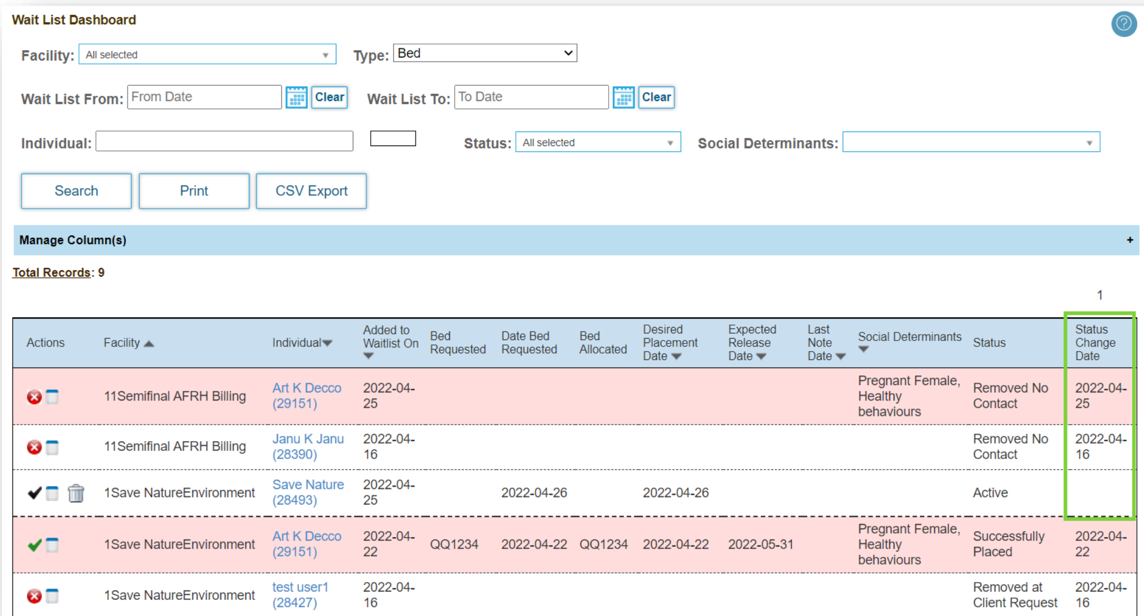
☑ Core

There is now a dropdown menu in the **Status** field within the **Wait List Dashboard**, which allows the user to change the status and the alert message. Changing their status will remove them from the Waitlist Dashboard.

Added a Column in the Wait List Dashboard

Core

In the **Wait List Dashboard**, there is now an additional column to display **Status Change Date**. If the status has been changed, the date of that occurrence will be shown here. **Records** labeled **Active** will not display any date in this column.



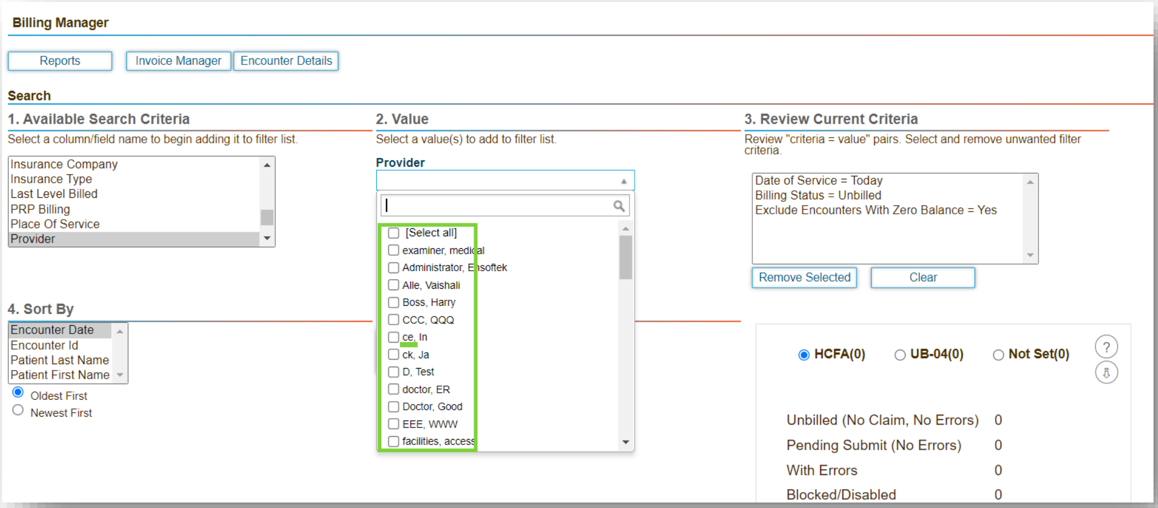
Actions	Facility	Individual	Added to Waitlist On	Bed Requested	Date Bed Requested	Bed Allocated	Desired Placement Date	Expected Release Date	Last Note Date	Social Determinants	Status	Status Change Date
	11Semifinal AFRH Billing	Art K Decco (29151)	2022-04-25							Pregnant Female, Healthy behaviours	Removed No Contact	2022-04-25
	11Semifinal AFRH Billing	Janu K Janu (28390)	2022-04-16								Removed No Contact	2022-04-16
	1Save NatureEnvironment	Save Nature (28493)	2022-04-25		2022-04-26		2022-04-26				Active	
	1Save NatureEnvironment	Art K Decco (29151)	2022-04-22	QQ1234	2022-04-22	QQ1234	2022-04-22	2022-05-31		Pregnant Female, Healthy behaviours	Successfully Placed	2022-04-22
	1Save NatureEnvironment	test user1 (28427)	2022-04-16								Removed at Client Request	2022-04-16

Billing

Added the Option to Select Multiple Providers in Billing Manager

Core

In the **Billing Manager**, users can now filter by selecting multiple providers in the dropdown list.



Made Various Adjustments within Statement Manager Settings

Core

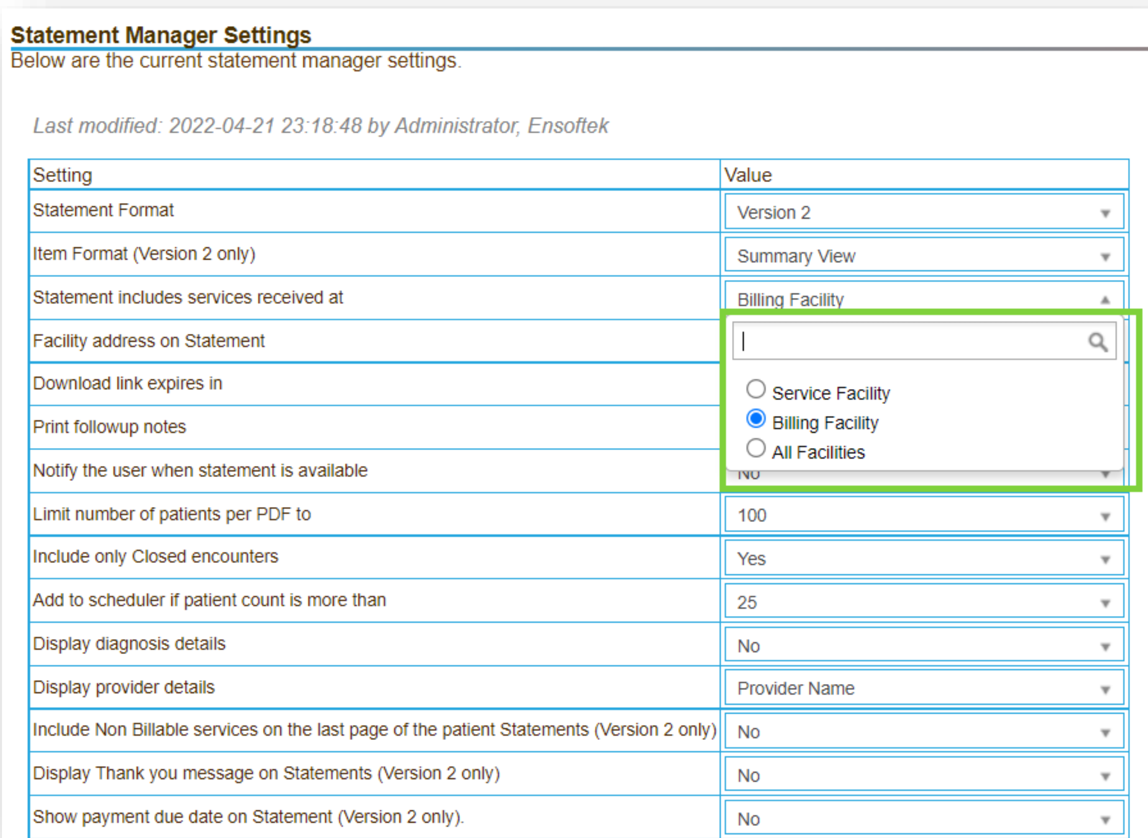
When working with the **Statement Manager**, there are now multiple versions of the **Statement Format**: **Version 1** and **Version 2**.

Version 2 includes new viewing options:

- **Summary View**: One line per encounter
- **Detail View**: Multiple lines per encounter
- **Detail View** is the default value for this field

Changed **Display provider details on patient Statements** to a multi-select option:

- Added name, footnotes, and license options
- If the old option was set to **No**, it will preselect **Name**
- If the old option was set to **Yes**, it will select all options
- These changes apply to both versions of the **Statement Format**



Statement Manager Settings

Below are the current statement manager settings.

Last modified: 2022-04-21 23:18:48 by Administrator, Ensoftek

Setting	Value
Statement Format	Version 2
Item Format (Version 2 only)	Summary View
Statement includes services received at	Billing Facility (options: Service Facility, Billing Facility, All Facilities)
Facility address on Statement	
Download link expires in	
Print followup notes	
Notify the user when statement is available	No
Limit number of patients per PDF to	100
Include only Closed encounters	Yes
Add to scheduler if patient count is more than	25
Display diagnosis details	No
Display provider details	Provider Name
Include Non Billable services on the last page of the patient Statements (Version 2 only)	No
Display Thank you message on Statements (Version 2 only)	No
Show payment due date on Statement (Version 2 only).	No

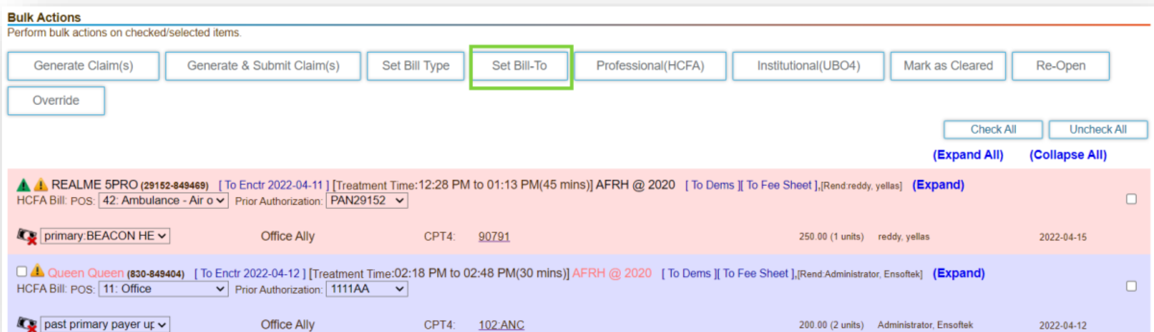
Added a Button to Set/Change who the Bill will be Sent To

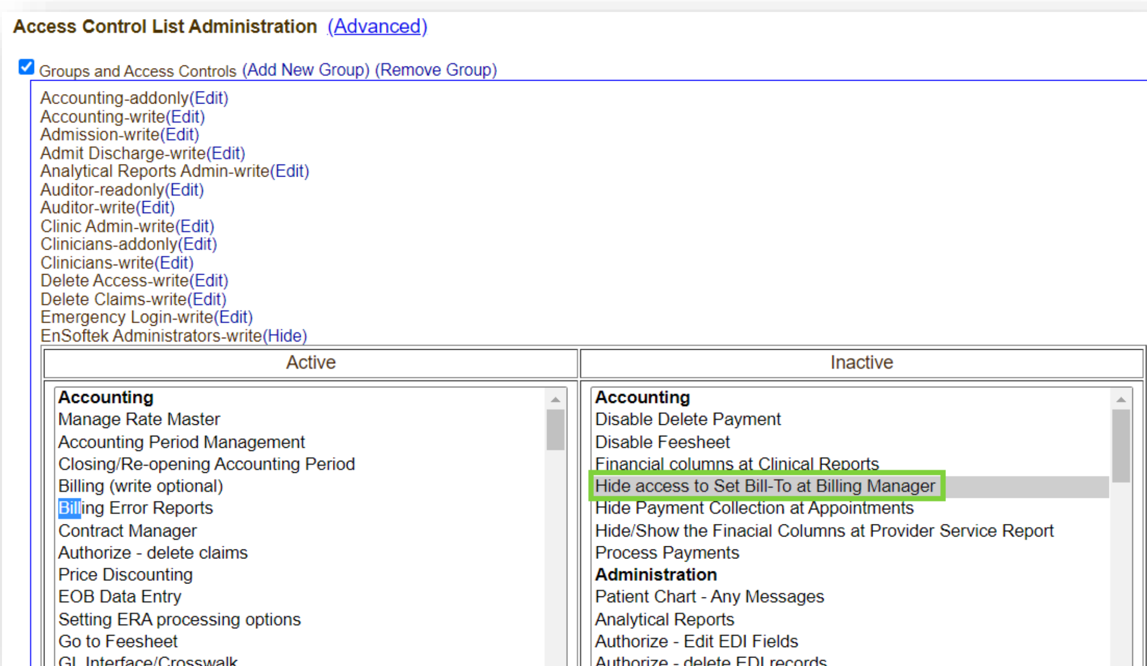
Core **Setup**

There is now a **Set Bill-To** button for users to select and set/change the **Bill-To** field of any encounter to **Insurance** or **Patient**.

ACL Title: **Hide access to Set Bill-To at Billing Manager**

- When the **ACL** is set to **Active**, the **Set Bill-To** button will be disabled at **Billing Manager**.
- When the **ACL** is set to **Inactive**, the **Set Bill-To** button will be enabled at **Billing Manager**.

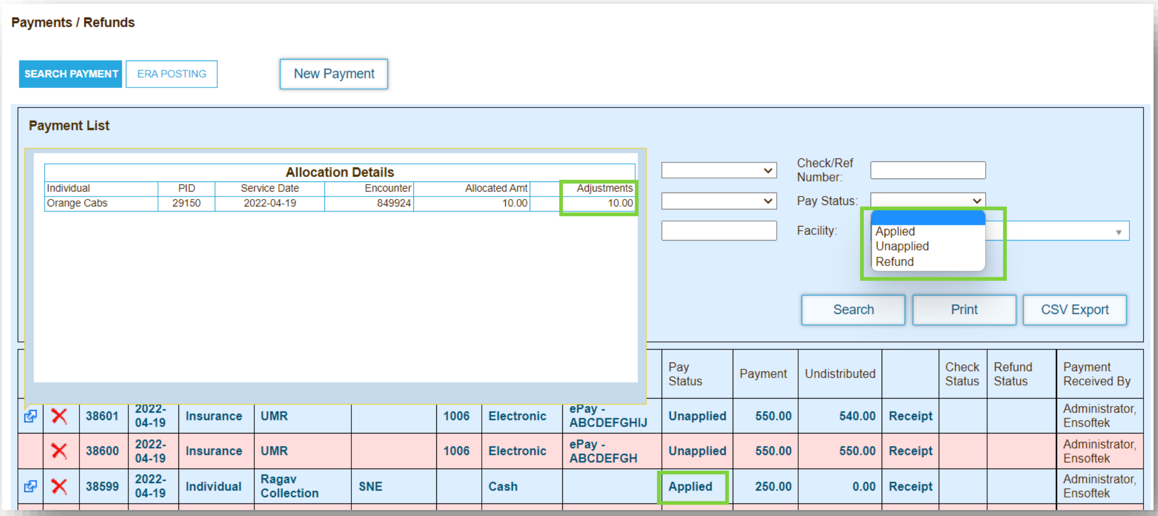




Made Various Adjustments to the Payments Page

Core

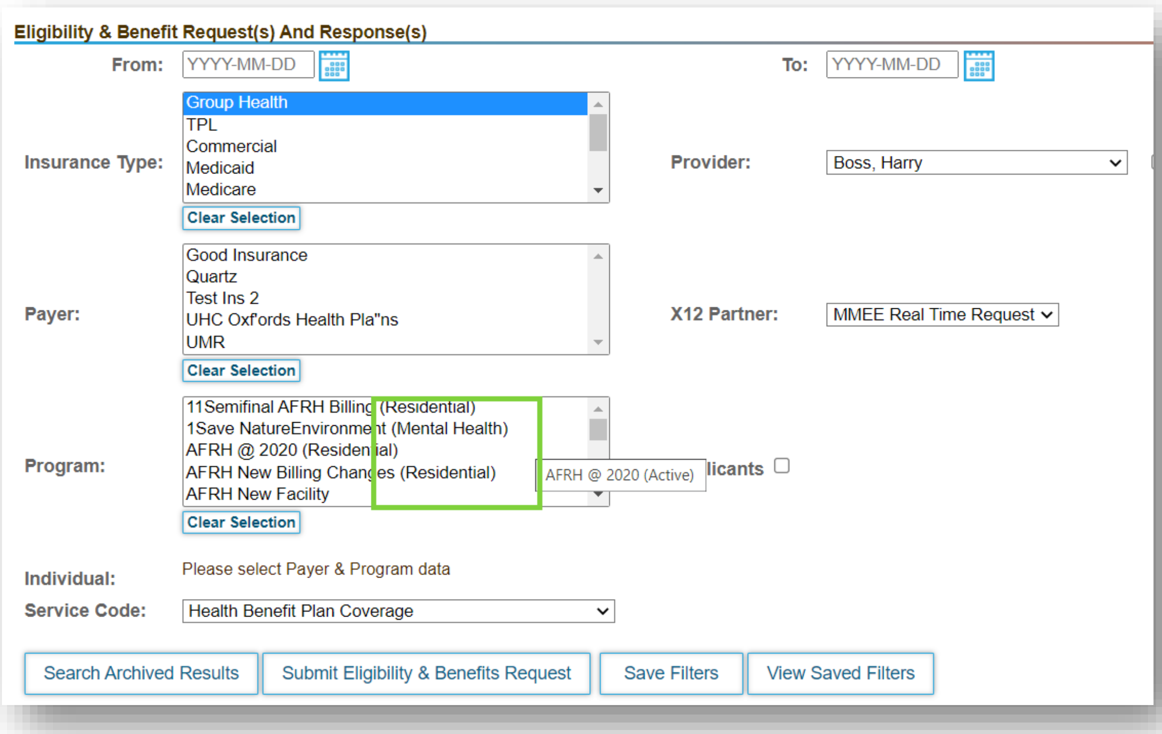
1. In the **Payments** page within the **Billing** tab, when viewing the **Allocation Details** of a **Payment**, there is now an additional column labeled **Adjustments**.
2. When choosing the filters on the **Payments** page, the **Pay Status** field now displays the following options:
   - Applied (previously **Fully Paid**)
   - Unapplied
   - Refund



Added Facility Type in the Eligibility & Benefit Requests Page

Core

On the **Eligibility & Benefit Request(s) And Response(s)** page, the **Program** field will now also display the **Facility Type** next to the **Facility Name**.



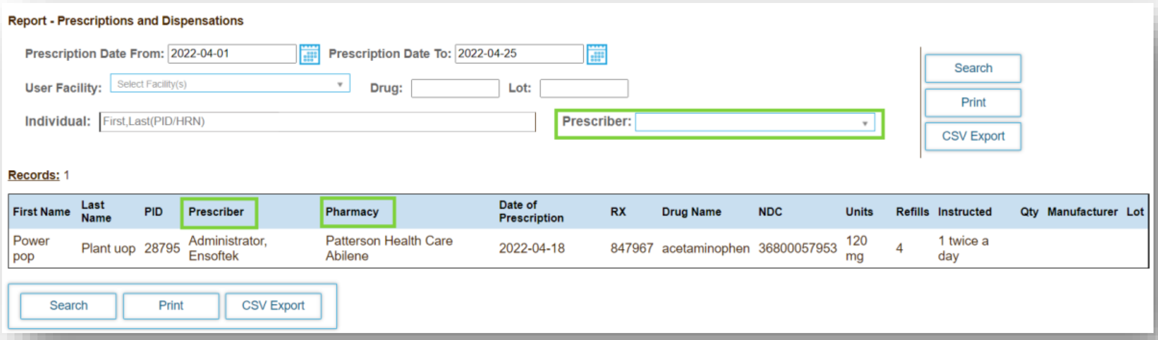
Reports

Made Various Adjustments to the Prescriptions and Dispensations Page

Core

In the **Reports** tab, select **Rx** from the navigation menu. This will take you to the **Prescriptions and Dispensations Report** page. The following changes have been made:

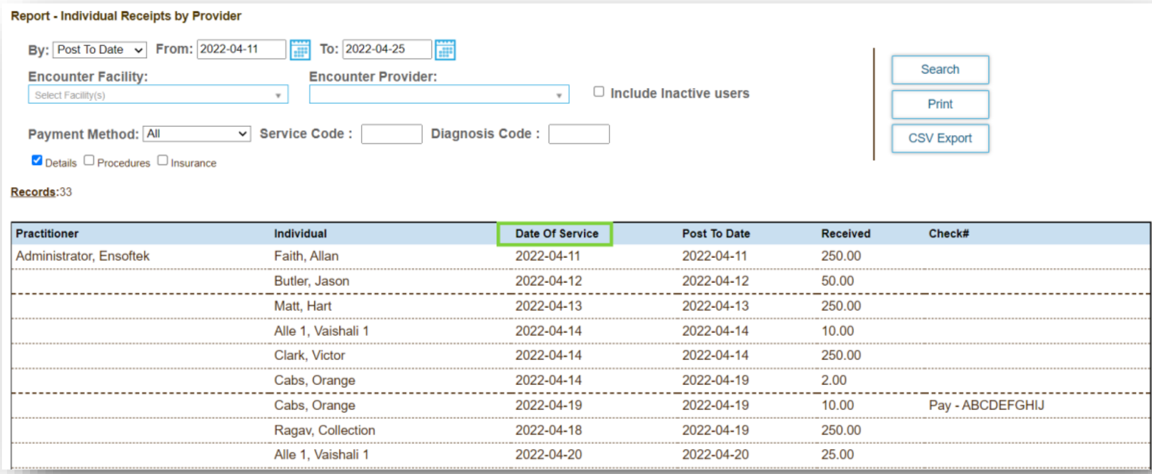
- Additional column to display the associated **Pharmacy**
- Additional column to display the name of the **Prescriber**
- Additional **Prescriber** field to filter your search



Added a Column in the Patient Receipts by Provider Report

☑ Core

In the **Patient Receipts by Provider** report, there is now a **Date of Service** column to display the date.

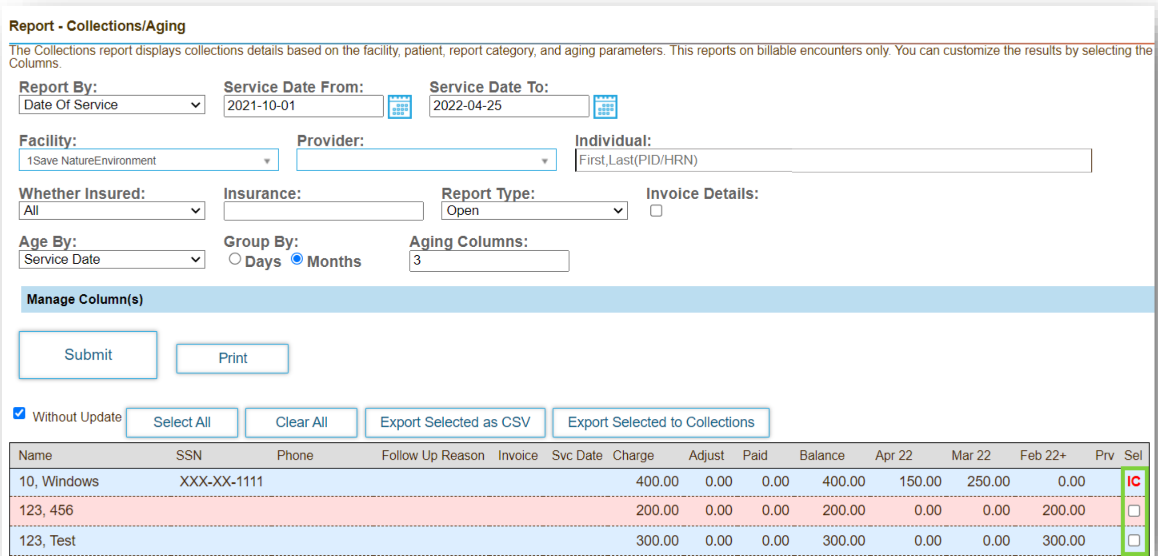


Practitioner	Individual	Date Of Service	Post To Date	Received	Check#
Administrator, Ensoftek	Faith, Allan	2022-04-11	2022-04-11	250.00	
	Butler, Jason	2022-04-12	2022-04-12	50.00	
	Matt, Hart	2022-04-13	2022-04-13	250.00	
	Alle 1, Vaishali 1	2022-04-14	2022-04-14	10.00	
	Clark, Victor	2022-04-14	2022-04-14	250.00	
	Cabs, Orange	2022-04-14	2022-04-19	2.00	
	Cabs, Orange	2022-04-19	2022-04-19	10.00	Pay - ABCDEFGHIJ
	Ragav, Collection	2022-04-18	2022-04-19	250.00	
	Alle 1, Vaishali 1	2022-04-20	2022-04-20	25.00	

Various Adjustments Made to the 'In Collections' Feature

Core   Setup

1. When viewing the results on the **Collections/Aging Report** page, there is now an option to flag specific **Encounter(s)** as **In Collections (IC)**. This will be removed once the balance of the **Encounter** is zero.



2. When viewing **Collections**, there is a red 'IC' displayed to indicate that the client is **In Collection**.
   a. A new field to filter a search labeled **In Collections** with the following options:
      i. All
      ii. Patients in collection
      iii. Patients not in collection
3. After the **Total Patients** field, the **Total Amount to collect for the reporting period** will be displayed, followed by the **Amount in collection** and the **Amount not in collection**.

Added Additional Columns in the Appointment Report

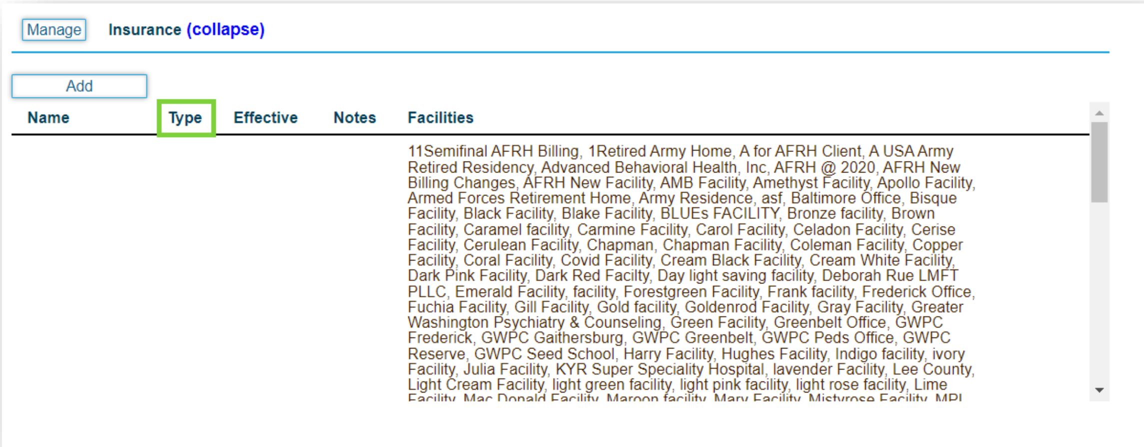
Core

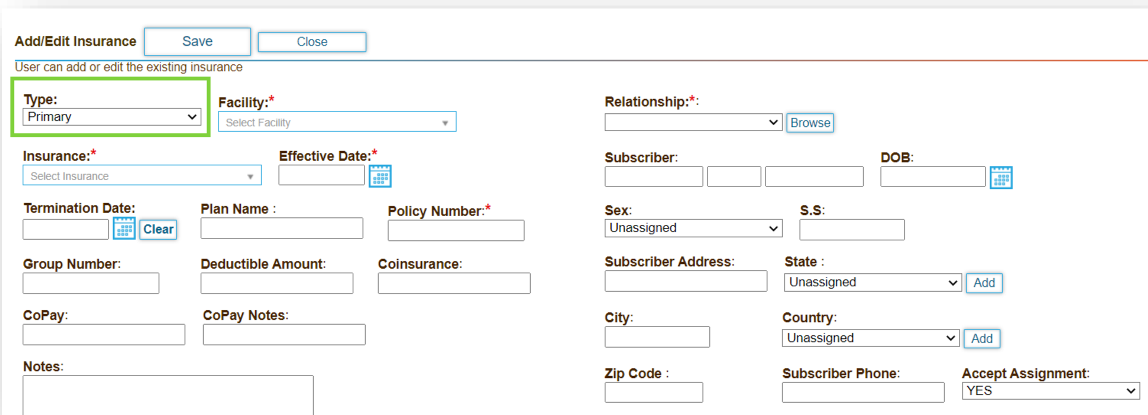
When viewing the **Appointment Report**, there are now additional columns to display the **Duration** and **Place of Service** of an appointment.

Added the Function to Edit a Funding Source After it is Entered

Core

In the **Funding Source** feature, there is now the ability to edit the **Funding Source**.



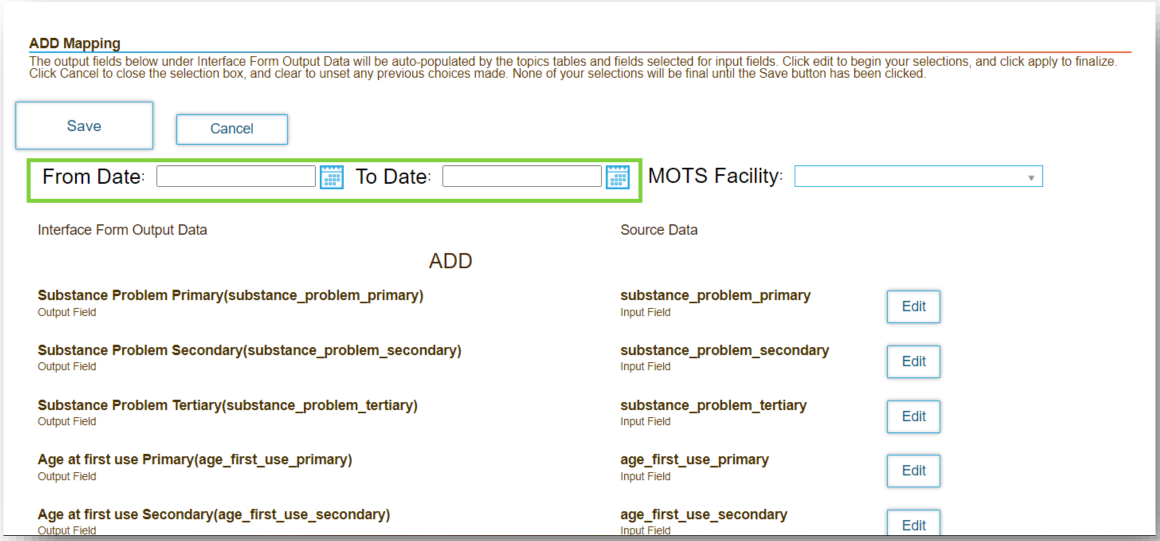


Administration

Improvements Made to the MOTS Mapping Interface

☑ Core

1. The enhanced **MOTS** mapping interface now has the ability to pull information from various versions of different forms.
2. Updating fields in the **MOTS** mapping interface will now reflect immediately in the **MOTS** data export.
3. Added **From Date** and **To Date** fields at **MOTS** mapping interface to select the necessary date ranges.
4. Added the **Update ALL MOTS Records Mappings** button that will auto-update all **Failed** and **Not Submitted MOTS** transactions with the latest data.

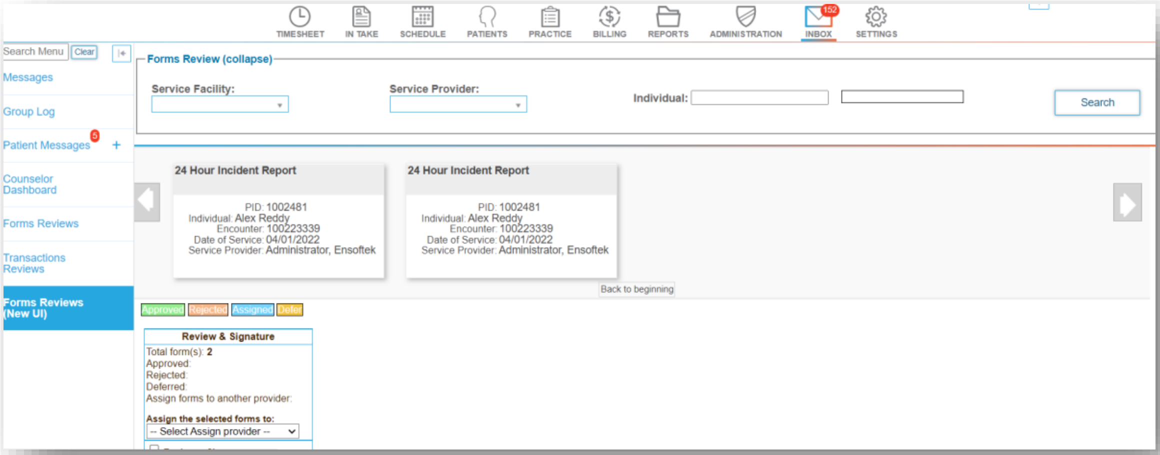


Inbox

Added the Option to Set New UI as the Default View in Forms Review

Core Setup

There is now the option to enable the **New UI (User Interface)** as your default view for **Forms Review**, rather than having to open the **New UI** manually. When enabled, all places in DrCloudEHR where you would see Form Reviews will display the **New UI** automatically.



Encounter Summary

Rename an Uploaded Document in an Encounter Summary

Core

When viewing an **Encounter** form, there is now an option to **Rename** the document once it has been uploaded successfully. When the **Encounter** is **Closed**, only the **View** and **Download** icons will be displayed on the **Encounter Summary** page.