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DrCloudEHR™
July Release Notes

Release to Staging Site – June 26, 2022

Release to Production Site – July 3, 2022

Table of Contents

Overview

This document contains the Release Notes for July 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

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

Release Dates

- **Updates available in Staging Sites: June 26, 2022**
- **Updates available in Production Sites: July 3, 2022**

Clients

Generate MOTS Status Record for Submission

✅ **Core**   ⚙ **Setup**

Once a user saves the **Date of Death** in demographics, the system will now automatically create a MOTS discharge record for submission with the client treatment status marked as **Death**.

Include Lived Name & Pronouns on the MDTP

✅ **Core**

Users can now see the **Lived Name** and **Pronouns** of a client in the MDTP.

Create Encounter Forms per the Workflow when Uploading Documents

✅ **Core**

When authorized users upload documents and create a new encounter to attach those documents, the system will now create all encounter forms configured to the encounter category.

Improvements to Emergency Access by Staff

☑ **Core**   ⚙ Setup

When users are authorized for Emergency Login access, they will now be able to see excluded clients in the main client search results. Excluded clients are highlighted with the **Lock** icon and authorized users can click the **Lock** icon to initiate access to these records. Once finished accessing, click the **Lock** icon to re-lock the record.

Notify Care Team Members when MDTP is Modified

☑ **Core**   ⚙ Setup

There is now an option to alert the Care Team when **Multidisciplinary Treatment Plan (MDTP)** data is edited.

Include MDTP Review in Supervisory Review Workflow

✅ **Core** ⚙️ **Setup**

There is now the option for supervisors to review the **Multidisciplinary Treatment Plan (MDTP)** on the following screens:

Treatment Plan Reviews screen, under the Inbox tab
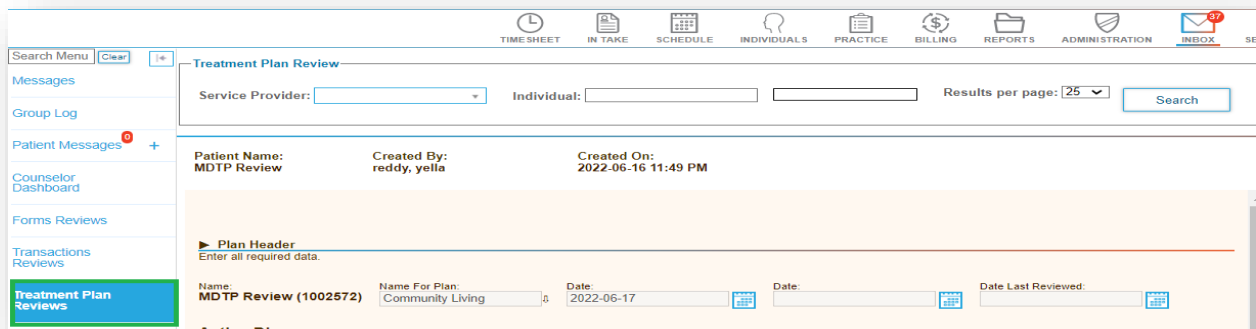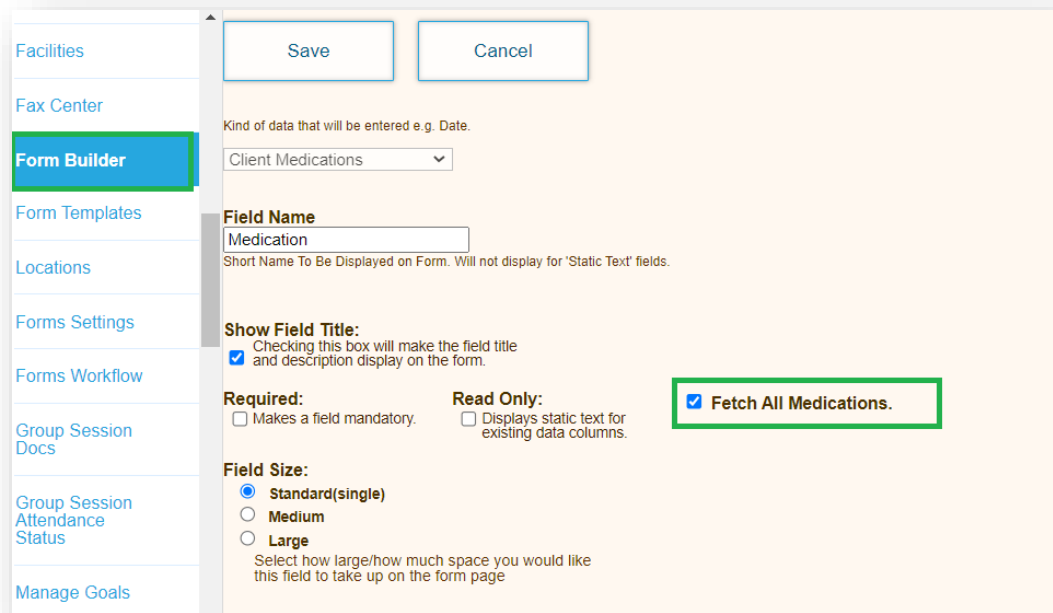

Messages screen, under the Inbox tab
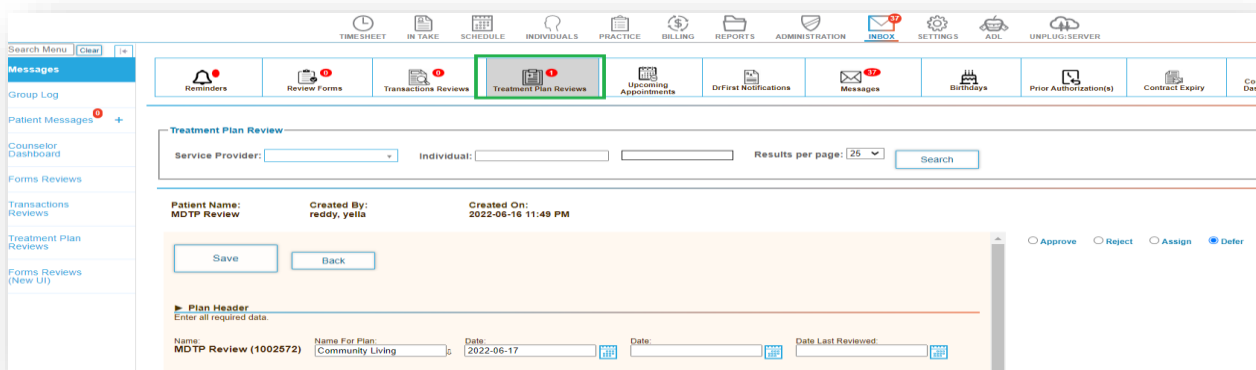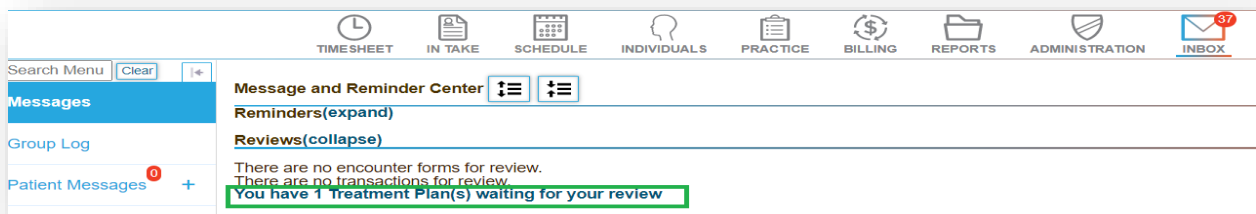
Multidisciplinary Treatment Plan Lists screen
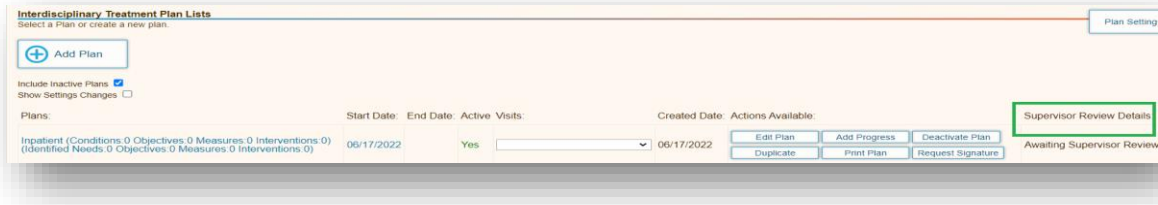
Option to Include only Active or All Medications in Form Builder Forms

☑ **Core**

Using the **Form Builder** tool, users now have the option to choose whether to show only active medications or to show all medications (default will only show active medications).

Option to Select Patient Position when Recording Blood Pressure

✅ Core ⚙ Setup

Authorized users can now select **Patient Position** (Lying Down, Sitting, Standing, etc.) options at **Vitals Form** when configured.

Option to Capture Referral Status

☑ Core

Authorized users can now choose from a list of referral status options when creating a new referral. The following options are provided:

- Received
- Sent
- Assigned
- Admitted
- Intake Complete
- Cancelled
- Inactive

Improvements to Medications

☑ **Core**

Added **History** hyperlink at the Client Chart to display the medication history in a popup window.

Added **Deleted Medication History** at the Medication Edit/Preview screen to view **Deleted** medications.

Deleted Medication History link popup window

Added a new report named **Medication History Report** to display medication changes for one or more clients.

Practice

Use Custom Templates to Notify Users via Email

☑ **Core** ⚙ **Setup**

Users can now set up custom templates to notify users via email such as when an offline report is ready.

Patient Portal

Option to Configure Incoming Messages from Patient Portal

☑ **Core**   ⚙ **Setup**

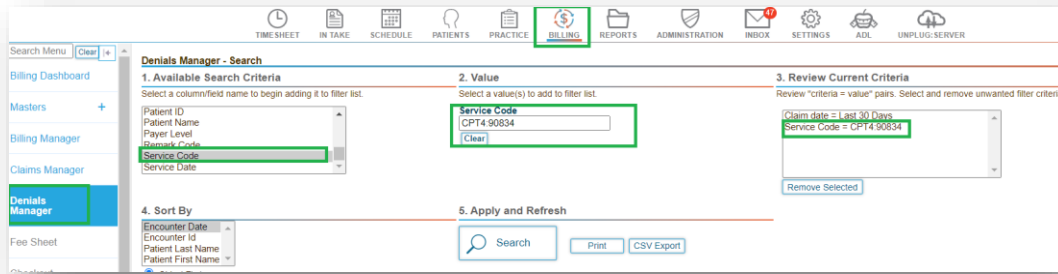When enabled, the **New Message** button at **Inbox** will be unavailable in the **Patient Portal**.
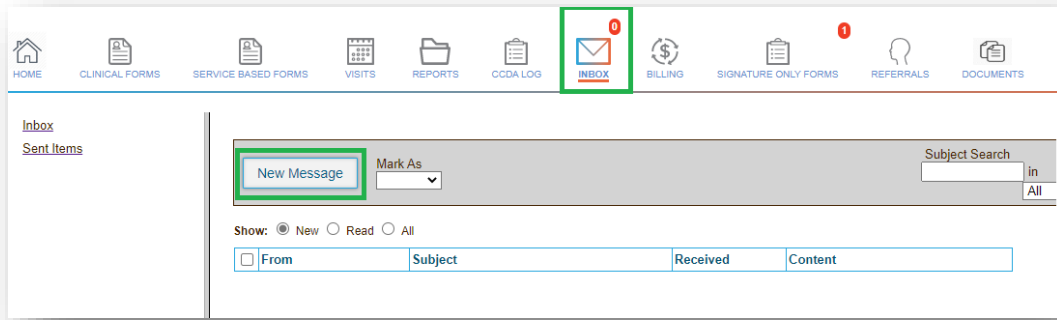
Billing
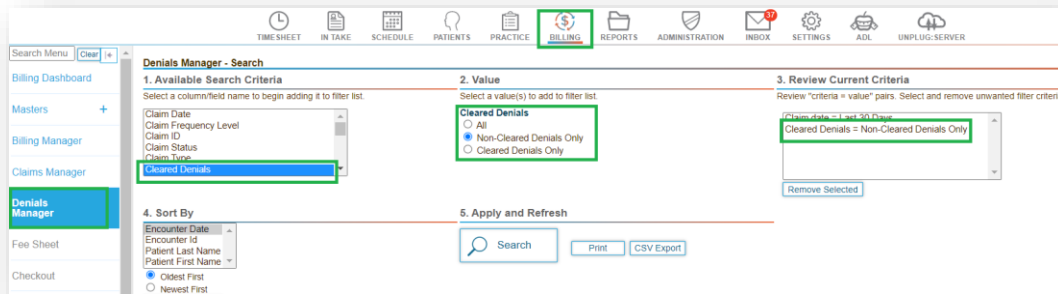
Filter Results in the Denials Manager using Service Code

✅ Core

In the **Denials Manager**, users can now use the **Service Code** field to filter their search.

Filter Results in the Denials Manager using Cleared Status

✅ Core

In the **Denials Manager**, users can now use the **Cleared Denials** field to filter between **Cleared Denials** and **Non-Cleared Denials**.

Option to Generate Client Statements Filtered by Payer

✅ **Core**   ⚙️ **Setup**

Authorized users can now set the **Display Client Statements based on the Payer at Statement Manager** option to **Yes**, displaying the insurance filter when generating new statements.

Note: The default value will be set to **No**.

When configured, the system splits payments into **Client Paid** and **Insurance Paid** columns.

Display the User who Initiated the Real-Time Eligibility Check

✅ Core

Real-Time eligibility requests history now includes the user who initiated the eligibility check.

Payer	Individual	DOB	Gender	Insurance Id	Provider	Request Date	Request By	Report	Status
Health Share OHP	test1 Applicants	07/26/2000	Female	12345	Administrator, Ensoftek	06/14/2022 01:35:17	Administrator, Ensoftek		Submitted

Reports

Option to Display Claim Numbers in the Encounters Report

✅ **Core**

Authorized users can now view the **Claim Numbers** column by checking the **Show Claim Numbers** checkbox from the **Manage Columns** list in the **Encounter Report**.

Option to Display Encounter Supervising Provider in the Provider Service Report

✅ **Core**

Authorized users can now view the **Supervisor** column by checking the **Supervisor** checkbox from the **Manage Columns** list in the **Provider Service Report**.

Option to Display Insurance Type

☑ **Core**

Authorized users can now view the **Insurance Type** column by checking the **Insurance Type** checkbox from the **Manage Columns** list in the following reports:

Provider Service Report

Net Revenue Report

Receipts Summary Report

Option to Filter Based on Location of Service in Multiple Reports

☑ Core

Authorized users can now filter using the **Place of Service (POS)** and **Location** filters in the following reports:

Collections Report

Provider Service Report

Net Revenue Report

Receipts Summary Report