



DrCloudEHR™ June Release Notes

Release to Staging Site – May 29, 2022

Release to Production Site – June 5, 2022

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Overview

This document contains the Release Notes for June 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

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

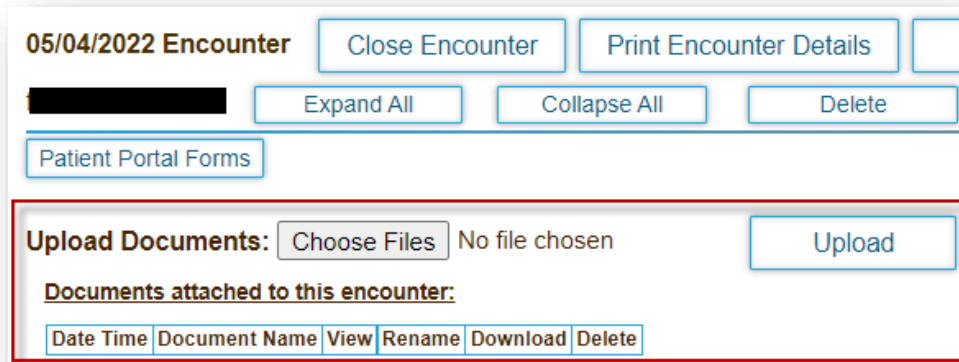
- **Updates available in Staging Sites: May 29, 2022**
- **Updates available in Production Sites: June 5, 2022**

Clients

Upload Documents to Encounters

Core

There is now the option to **Upload Documents** in an existing encounter, as well as during the creation of a new encounter. Uploaded documents are saved to the client’s **Documents** folder along with linking them to the encounter they were uploaded through.

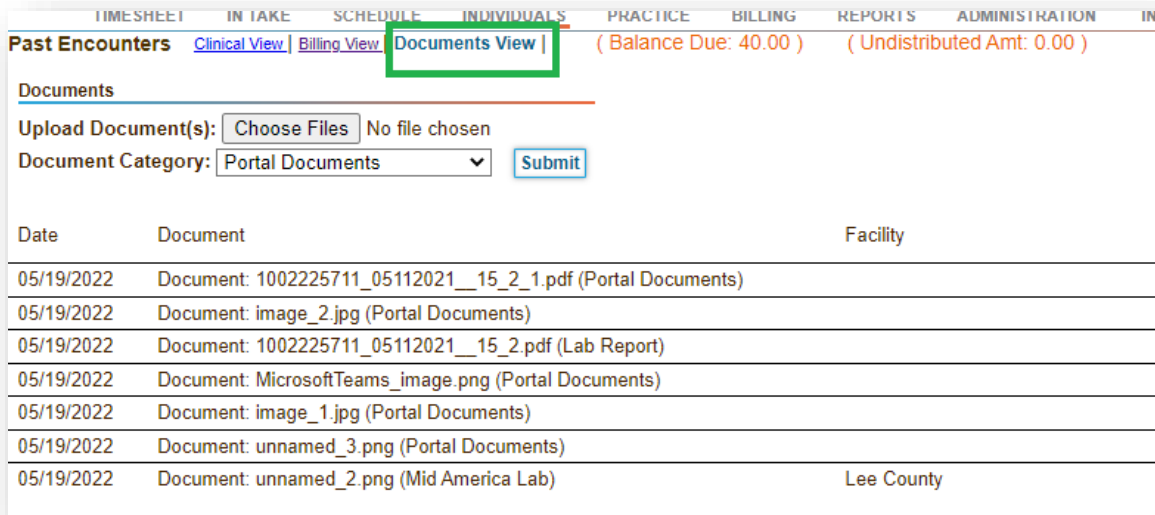


Upload Documents in Client Portal

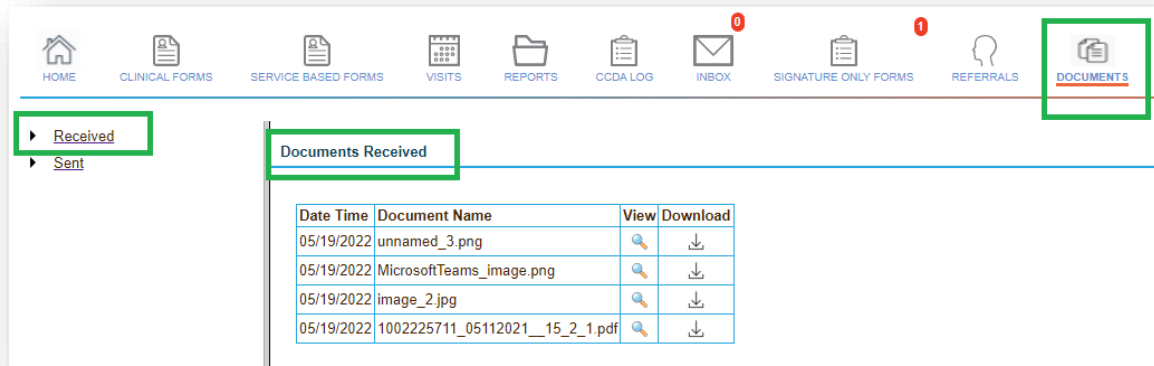
Core Setup

There is now the option for clients to manage their documents in the **Client Portal**. This feature allows clients to securely view documents that have been sent to them and ones they have sent out. Clients will be notified via email when a document is uploaded to their chart. Providers are notified via Inbox reminders within DrCloudEHR when a client uploads a document in the **Portal**.

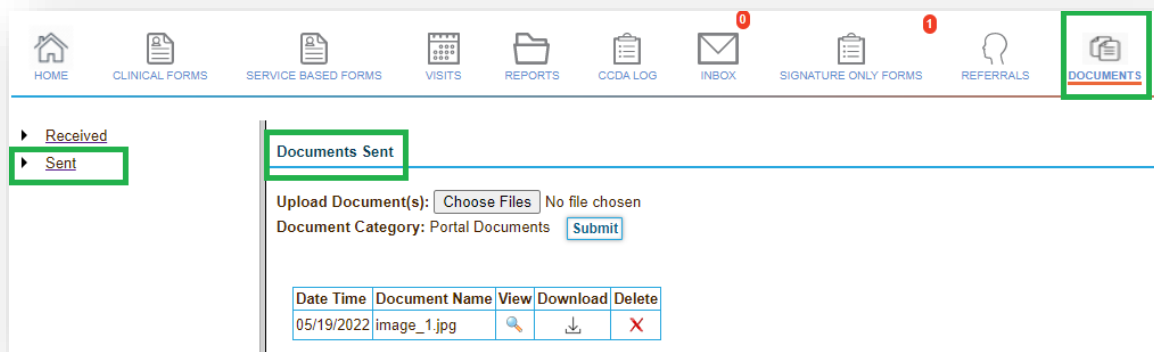
Client’s Chart – Documents View



Client Portal – Documents – Received Folder



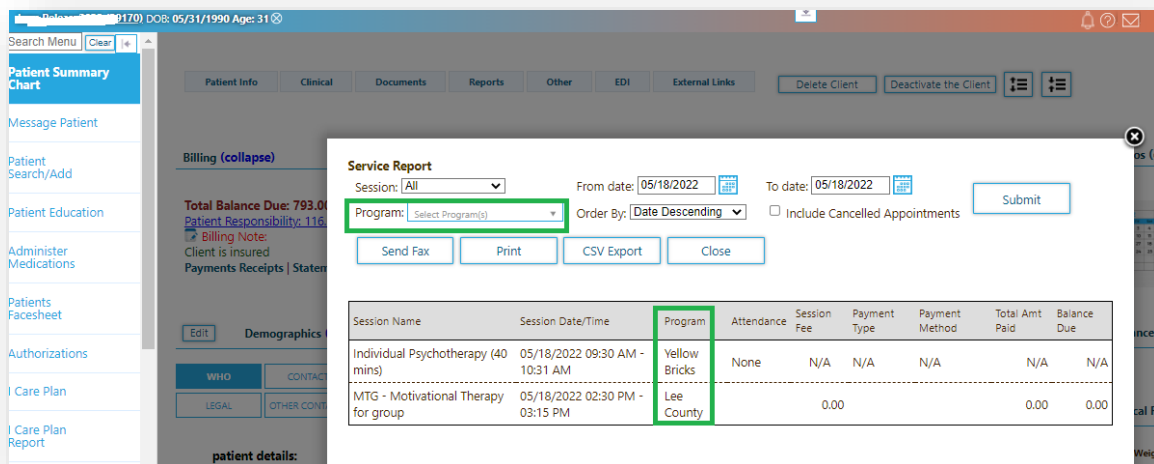
Client Portal – Documents – Sent Folder



Report on Upcoming Appointments in the Service Report

Core

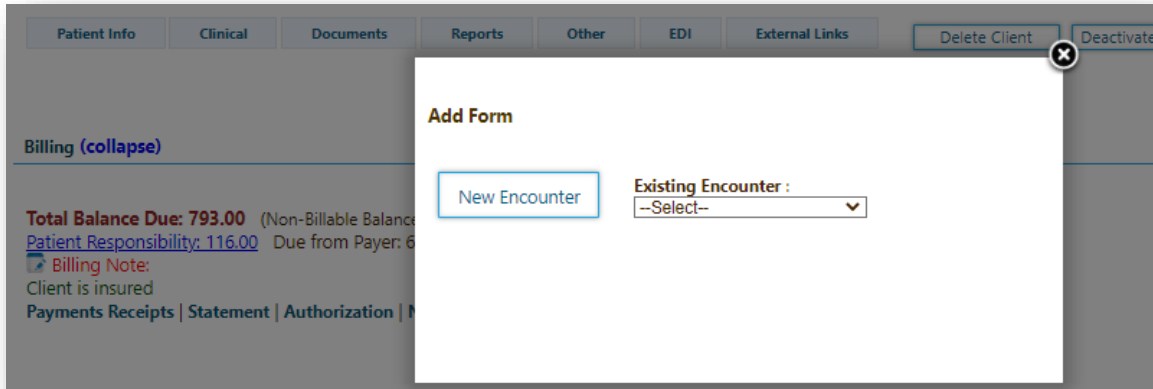
There is now the option to report on upcoming appointments, including their associated facilities.



Form Creation Workflow

✔ Core

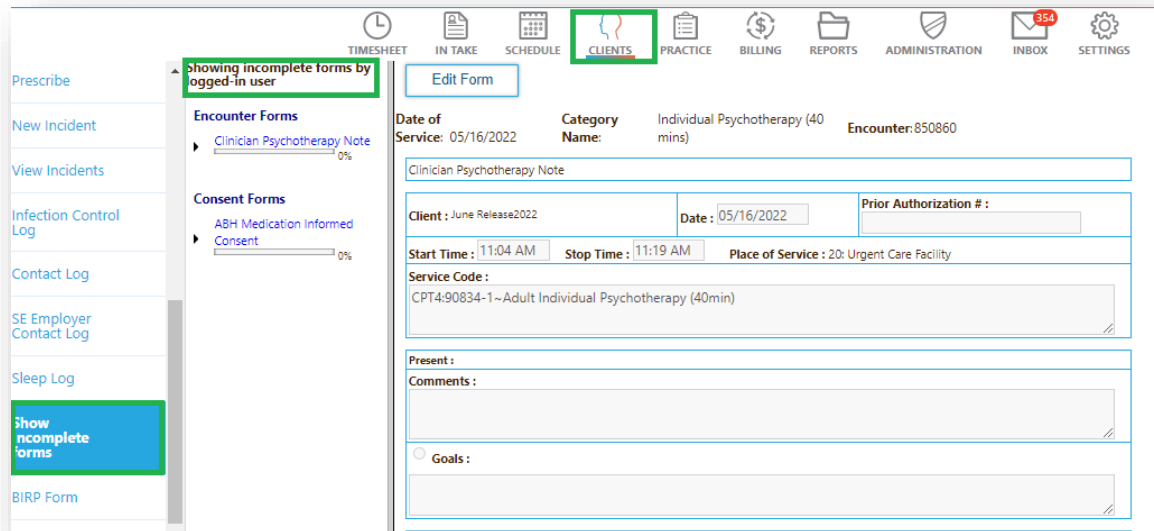
Visit forms are required to be linked to an encounter. This update now prompts users to choose either to create a **New Encounter** or to select an **Existing Encounter** when they select a form from the Forms Cabinet.



Show Incomplete Forms

✔ Core

In the **Clients** tab, there is a new option in the **Navigation Menu** called **Show Incomplete Forms**. This option displays all incomplete forms, enabling the user to view, complete and/or sign forms in one screen.



Schedule

Undo Client Check-In

Core

Once a client is checked in for an individual appointment, there is now an option to undo the check-in if required. Note, this will also delete the associated encounter and any forms that may have been added.

*Before selecting **Undo Check-In** button*

The screenshot shows a scheduling form for a client named Decco, Art. The form includes fields for Client, Service Type (Family Psychotherapy, 45min), Date (05/19/2022), Title, Program (Armed Forces Retirement Home), Place of Service (01: Pharmacy), Billing Program, Provider (Administrator, Ensoftek), and Supervising provider (N/A). The Status is set to 'Arrived'. At the bottom, the 'Undo Check-In' button is highlighted with a green box. Other buttons include Save, Find Available, Delete, Cancel, Create Duplicate, Print Slip, and Encounter.

*Preview of the confirmation screen upon clicking the **Undo Check-In** button*

The confirmation dialog box contains the following text: "Are you sure, you wish to undo the patient check-in? NOTE: Encounter, Forms and Payments if any auto created against this patient check-in will be reversed and same cannot be undone." Below the text are two buttons: "Confirm" and "Cancel".

Supervising Provider Field on Appointment Screen

Core Setup

There is now the option to choose a **Supervising Provider** on the **Appointment** screen (Individual and Group) from a drop-down menu, with a list of pre-selected providers. Supervising Provider field will be retained in the following screens:

Appointment screen

The screenshot shows the Appointment screen with the following fields and values:

- CLIENT** | Benefits | Export to Outlook | \$15.00 (Copay) |
- Check-in notes:** 04/14/2022 17:11 (Ensoftek Administrator) Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dum [more..](#)
- Client:** Decco, Art | PID: 29151 | External ID: 29151
- Home Phone:** 111-1111 | **Work Phone:** 222-2222 | **Mobile Phone:** 555-5555
- Funding Source:** (P) Abartment \$10 (\$04/01/2022 until 04/30/2023)
- *Service Type:** Family Psychotherapy (45min) |
- Title:** Family Psychotherapy (45min)
- Date:** 05/19/2022 | All day event
- From:** 08:15 AM | **To:** 09:00 AM | **Duration:** 45 min
- Place of Service:** 01: Pharmacy
- Recurrence:** Repeats every day until
- *Billing Program:** Armed Forces Retirement Ho
- *Program:** Armed Forces Retirement Home
- Provider:** Administrator, Ensoftek
- Event Address:**
- *Supervising provider:** Examiner, Medical (highlighted in green)
- Status:** None |
- Create Encounter with Start Time As:** Appt Time | Check-in Time
- Comments:**
- Mark as Telehealth Appointme

Fee Sheet Screen

The screenshot shows the Fee Sheet screen with the following fields and values:

- Place Of Service:** 05: Indian Health Ser
- Bill-To:** Individual
- Bill Type:** Not Set
- Providers:** Rendering Administrator, Ensoft
- Supervising:** doctor, Immunologist (highlighted in green)
- Referring:** -- Unassigned --
- Price Level:** Standard
- Prior Authorization:** --Unassigned--

Encounter screen

Patient Encounter by Ensoftek Administrator (Collapse) (0%)

Insurance : (P):Abartment \$10 (from 04/01/2022 until 04/30/2023)
Reason:
Service Program: Armed Forces Retirement Home
Address :
Billing Program: Armed Forces Retirement Home
Place Of Service: 01:Pharmacy
Referring Provider:
Referring NPI:
Service Type: Family Psychotherapy (45min)
Date of Service: 05/19/2022 14:13:00
Bill-To: Client
Provider: Administrator, Ensoftek
Start Time: 14:13
Stop Time: 14:58
Duration in Mins: 45
Appointment Start Time: 08:15
Appointment Stop Time: 09:00
Duration in Units: 1
Check-Out Date:
After Visit Summary:
Telehealth: No
Supervising Provider: Examiner, Medical











Practice

Link Forms to a Facility within Client Portal

Core  Setup

Now authorized users can link forms to a facility so when the **Client Portal** is configured to allow access to encounter forms for a facility or location. Clients may only see forms for the facilities they are admitted to. Once configured, forms can be linked to an individual facility.

Patient Portal Forms Administration

Form(s)	Class Based Consent Form(s)	Consent Form(s)			
Category	Form Name	Order	Enabled	Facilities	Edit
	FB Form Test 1	0	Yes		
	14-Day Treatment Plan	0	Yes	laitnediseR	
	24 Hour Incident Report	0	Yes	Mental Health	
	A&D and Mental Health Assessment	0	Yes	Mental Health	
	A&D and Mental Health Assessment	0	No		
	A&D Assessment	0	No		
	A&D Assessment	0	No		
	A&D Assessment Update.	0	No		
	A&D Assessment V1	0	Yes	laitnediseR	
	A&D Assessment V2	0	No		

dm

Save Cancel

Form Name: 24 Hour Incident Report









Order:

Portal Enable:

Facilities:

Available Facilities		Selected Facilities
1Save Nature Clinic #123	>>	Mental Health
Abc Hospitals	>	
KSR Super Specialty Hospital	>	
KYR multiple Super Specialty H	>	
laitnediseR	>	
Lee County	<	
Natural Vaidyalayam	<	
NIMS	<	
secivreS tnehtaerT sliarT kcorr	<<	
tneitapuO dnomdeR	<<	

dm

Edit









Usual & Customary Charge for Services

Core

There is now the option to set effective dates for the amounts of **Usual & Customary** charges for services. This allows the user to record changes in charges over time. Based on the effective dates and date of service, the system will populate the fee-sheet with the appropriate charge(s).

Code	Modifier	Active	Dx Rep	Serv Rep	Type	Description	Short Description	Category	Mapped ICD Code	Standard	OHP AD Cap	OHP MH Cap	Actions
90791		Yes	No	No	CPT4	Psychiatric Diagnostic Evaluation				100.00			[Delete] [Edit] [Fee]
90792	AF	Yes	No	No	CPT4	Psychiatric Diagnostic Eval MD				325.00			[Delete] [Edit] [Fee]
90792		Yes	No	No	CPT4	Psychiatric Diagnostic Evaluation with Medical Services				325.00			[Delete] [Edit] [Fee]
90832		Yes	No	No	CPT4	Psychotherapy, 30 minutes with patient and/or family				110.00			[Delete] [Edit] [Fee]
90834		Yes	No	No	CPT4	Psychotherapy, 45 minutes with patient and/or family				154.00			[Delete] [Edit] [Fee]
90837		Yes	No	No	CPT4	Psychotherapy, 60 minutes with patient and/or family				200.00			[Delete] [Edit] [Fee]
90847		Yes	No	No	CPT4	Family Psychotherapy				167.00			[Delete] [Edit] [Fee]

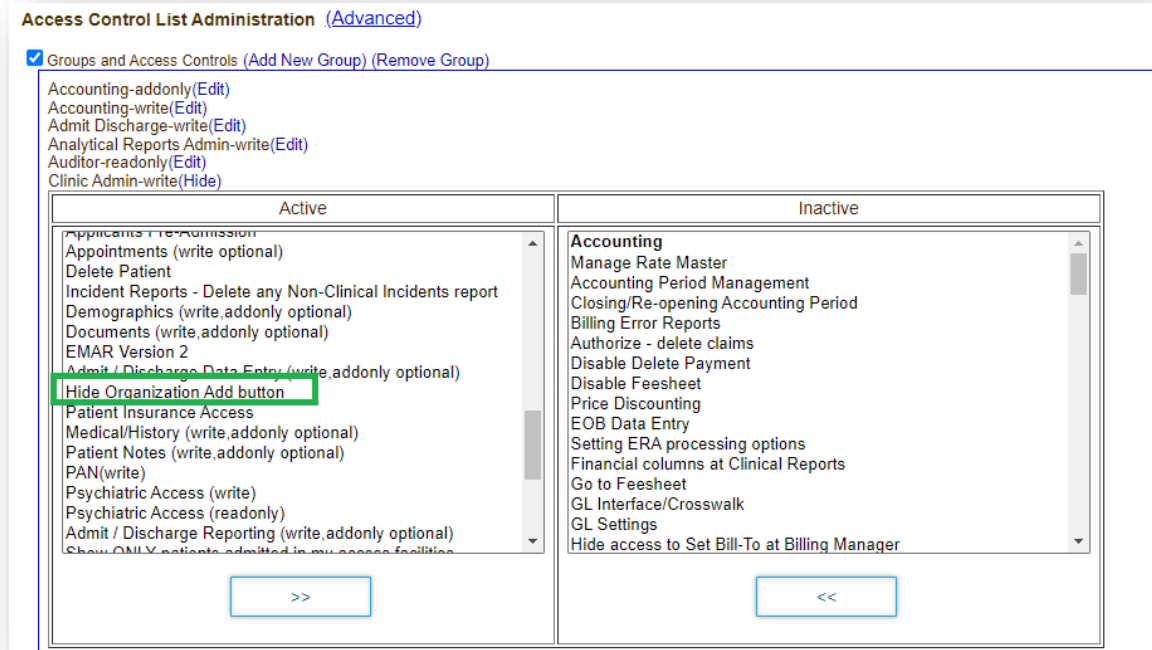
The **Fee** hyperlink will open the **Charge Time Interval** screen:

Effect From Date	To Date	Standard Fee	OHP AD Cap	OHP MH Cap	Modified By	Modified On	Actions
01/01/2010		326.00	0.00	0.00	Ensoftek Admin	03/10/2022 06:22:26	[Edit] [Apply]

User Group Restriction

Core Setup

There is now the option to limit unwanted changes to the **Organizations List**. Authorized users can now restrict users from accessing the ability to **Add Organization**.



Reports

Total Clients Displayed in Collections/Aging Report



Within the **Collections** report, users can now see the **Total Number of Clients** below the results.

Without Update

Name	SSN	Phone	Follow Up Reason	Invoice	Svc Date	Charge	Adjust	Paid	Balance	May 22	Apr 22	Mar 22+	Prv	Sel
SPro, Realme 5	XXX-XX-1111					5,040.00	-70.00	0.00	4,970.00	4,760.00	210.00	0.00		<input type="checkbox"/>
Admit, ARC K						80.00	0.00	0.00	80.00	80.00	0.00	0.00		<input type="checkbox"/>
Alle, Vaishali S	XXX-XX-3333	44444				1,340.00	0.00	0.00	1,340.00	200.00	1,140.00	0.00		<input checked="" type="checkbox"/>
Animals, Save A						610.00	-2.00	2.00	606.00	0.00	606.00	0.00		<input checked="" type="checkbox"/>
Birds, Save A						710.00	0.00	0.00	710.00	0.00	710.00	0.00		<input type="checkbox"/>
Climate, Save A						200.00	0.00	0.00	200.00	0.00	200.00	0.00		<input type="checkbox"/>
Environment, Save A						400.00	0.00	450.00	-50.00	0.00	-50.00	0.00		<input type="checkbox"/>
Fields, TestS		111-111-1111				480.00	0.00	0.00	480.00	80.00	400.00	0.00		<input type="checkbox"/>
JanuS, JanuS K	XXX-XX-2323	111-111-1111				320.00	0.00	0.00	320.00	320.00	0.00	0.00		<input type="checkbox"/>
Kaka, Kaka						16.00	0.00	0.00	16.00	16.00	0.00	0.00		<input type="checkbox"/>
Money, Save A						510.00	0.00	225.00	285.00	0.00	285.00	0.00		<input type="checkbox"/>
Nature, Save A						200.00	0.00	0.00	200.00	0.00	200.00	0.00		<input type="checkbox"/>
Nature, Save						200.00	0.00	0.00	200.00	0.00	200.00	0.00		<input type="checkbox"/>
Planet, Save A						500.00	0.00	0.00	500.00	100.00	400.00	0.00		<input type="checkbox"/>
Power ghjhj, Van, Nus, rock K						1,300.00	0.00	0.00	1,300.00	0.00	1,300.00	0.00		<input type="checkbox"/>
Server, Unplugged		111-111-1111				210.00	0.00	0.00	210.00	210.00	0.00	0.00		<input type="checkbox"/>
Test, Form						80.00	0.00	0.00	80.00	80.00	0.00	0.00		<input type="checkbox"/>
Tom, Test						80.00	0.00	0.00	80.00	80.00	0.00	0.00		<input type="checkbox"/>
Water, Save A		343-545-4354				35.00	0.00	0.00	35.00	0.00	35.00	0.00		<input type="checkbox"/>
Total number of patients : 19						Report Totals:		12,311.00	-72.00	677.00	11,562.00	5,926.00	5,636.00	0.00

Class-Based Report



The **DX Report** is a new class-based report, highlighting specific client demographic information and other client-related fields based on their diagnosis and dates of service.

Report - Dx Codes Report

Service Date From: 05/16/2022 Service Date To: 05/18/2022 Dx Code: Clear

Manage Column(s) +

Total Number of Individual(s): 1

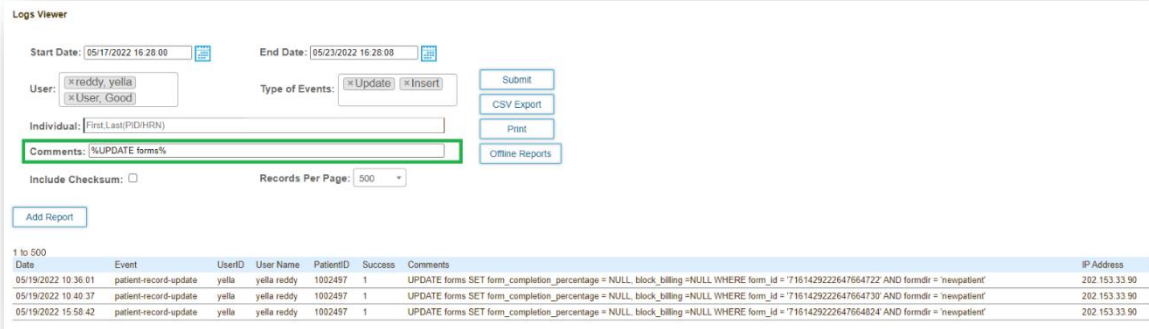
PID	TOP ID	Granted Psychosocial / PRN Consent	Age	Marital Status	Race	Ethnicity	Sex	Gender Identity	Sexual Orientation	Date DX	DX Code	Dx	Program Enrolled	Intake Date to Program	Discharge Date	Sessions Attended	Sess Can
1002485	1231	Yes	2 year(s)	domestic partner	Hispanic	Japanese	Female	Gender Variant	Straight or heterosexual	05/16/2022	ICD10:F10.20	(F1020)Alcohol dependence, uncomplicated	1 Save Nature Clinic #123	04/10/2022	N/A	0	1
1002485	1231	Yes	2 year(s)	domestic partner	Hispanic	Japanese	Female	Gender Variant	Straight or heterosexual	05/16/2022	ICD10:A75.0	Epidemic louse-borne typhus fever due to Rickettsia prowazekii	1 Save Nature Clinic #123	04/10/2022	N/A	0	1

Administration

Option to Search Logs using Comments

Core

There is now the option for users to filter their search criteria using the **Comments** field.



Security Changes

Core **Setup**

Once configured, the system will now include the following security enhancements:

- Cookies are deleted after Logout or Session time out
- The session time out notification can be set to any amount of time
- Based on a configurable interval for session time out, users are prompted to either Logout or Continue Working

