



ensoftek[®]

DrCloudEHR[™]
July Release Notes

Release to Staging Site – June 26, 2022

Release to Production Site – July 3, 2022

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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.

The screenshot shows a web form for a 'Plan Header'. At the top are 'Save' and 'Back' buttons. Below is a section titled 'Plan Header' with the instruction 'Enter all required data.' The form contains several input fields: 'Name' (Realme 5Pro (1002497)), 'Name For Plan' (PLAN NEED/CONDITION), 'Start Date' (06/14/2022), 'End Date' (06/30/2022), and 'Date Last Reviewed' (06/13/2022). Below these are two fields for 'Lived Name' and 'Pronouns', both containing the text 'Preferred For Testing'. At the bottom, there is a section for 'Active Diagnoses' listing three medical codes: A68.0(Louse-borne relapsing fever), A38.9(Scarlet fever, uncomplicated), and F43.25(Adjustment disorder with mixed disturbance of emotions and conduct).

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.

Actions	Name	Client DOB	Client Sex	Home Phone	Mobile Phone	Work Phone	S.S.	External ID	PID	Payer Code	Admit Facility(s)	Insurance	# Enc(s)	Issues	[Date (Days) of Last Encounter]
	RFP, LAPTOP	04/01/2022	Male					1002511	1002511		KYR multiple Super Specialty Hospital	CIGNA (WESTERN GR...	9		06/09/2022 (1)

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.

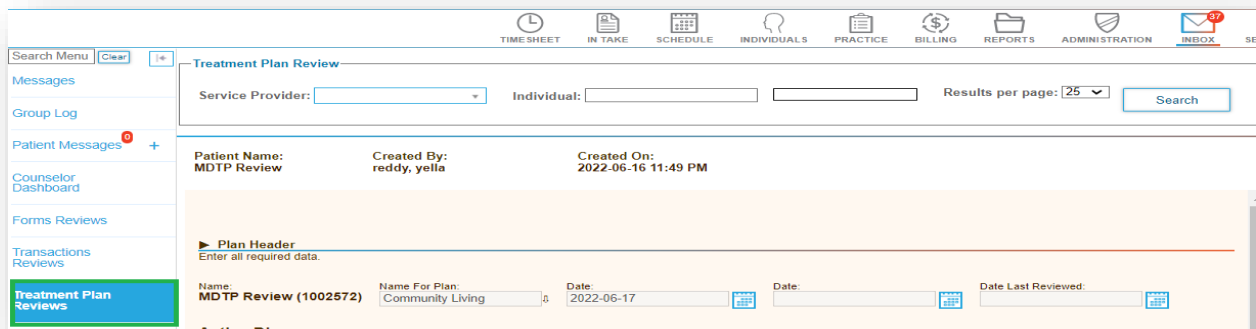
Priority	From	Action	Due Date	Individual	Description
High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	06/01/2022 (Overdue)	Test Patient (100162)	There exists a waitlist for this slot. For information, visit the Waitlist Dashboard.
High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	TODAY	Jack Test (10061)	Initial plan treatment plan for Jack Test (10061) has been updated. Please review for changes/variances.
High	Administrator, Ensoftek	<input checked="" type="checkbox"/>	TODAY	Jack Test (10061)	Initial treatment plan for Jack Test (10061) has been updated. Please review for changes/variances.

Include MDTP Review in Supervisory Review Workflow

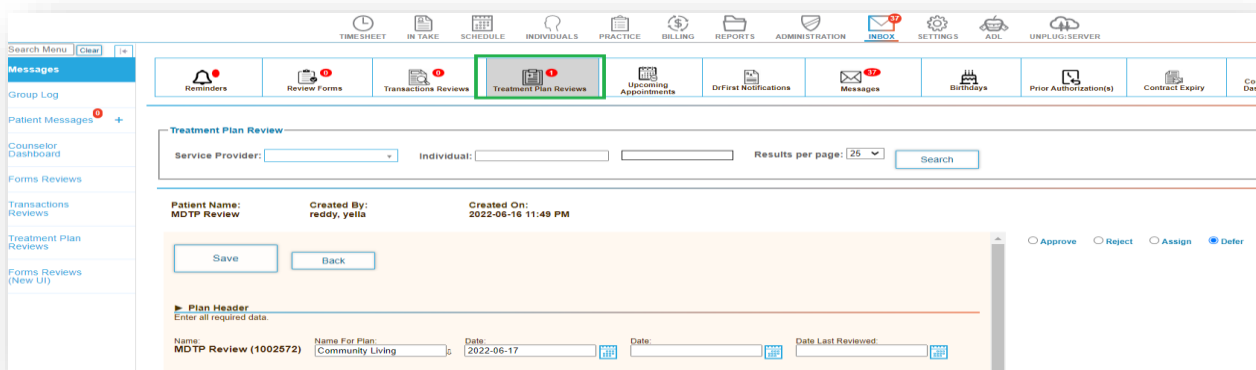
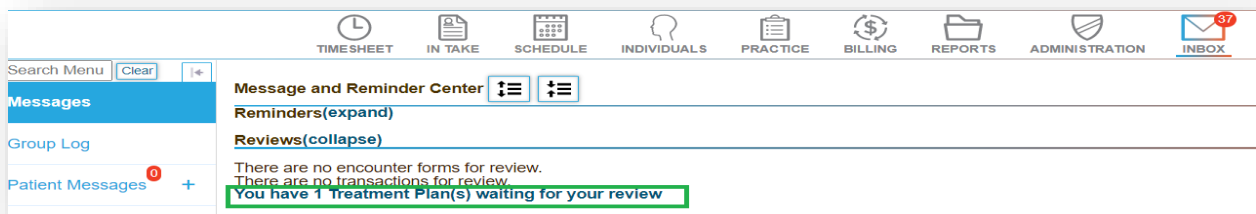
Core Setup

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

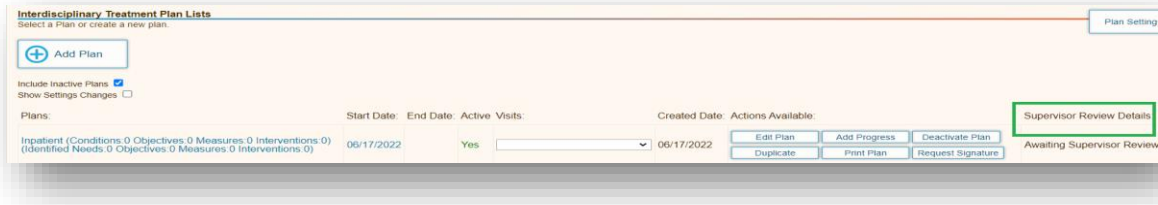
*Treatment Plan Reviews screen, under the **Inbox** tab*



*Messages screen, under the **Inbox** tab*



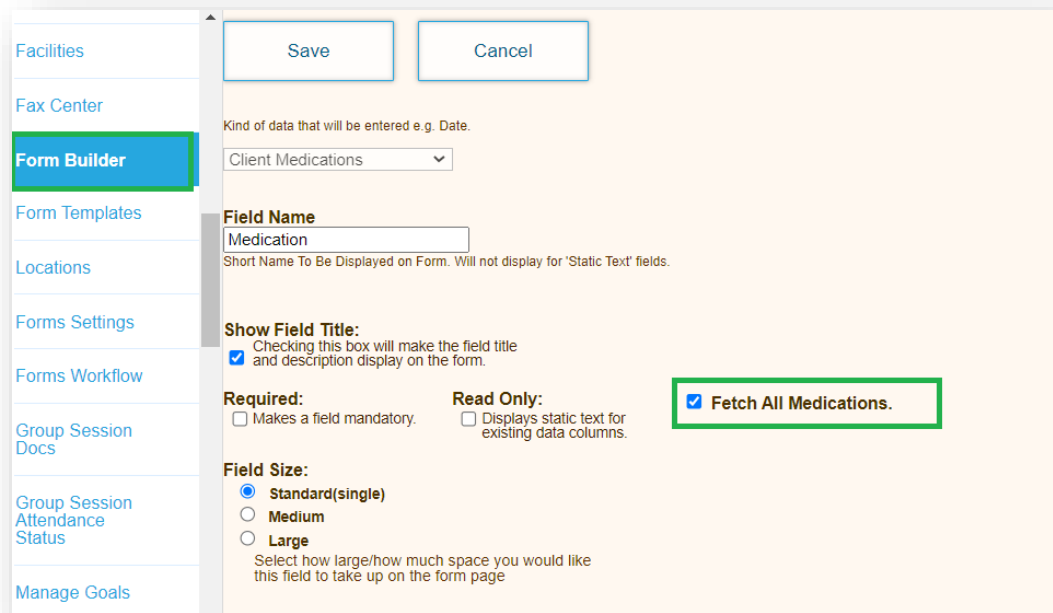
Multidisciplinary Treatment Plan Lists screen



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.

Vitals		
Name	Unit	2022-06-17 6:31 PM 
Weight	lbs	<input type="text"/>
Weight	kg	<input type="text"/>
Height	in	<input type="text"/>
Height	cm	<input type="text"/>
Height	ft	<input type="text"/>
Patient Position		<div style="border: 1px solid green; padding: 2px;"> -Select-  -Select- Lying Down Sitting Standing </div>
BP Systolic	mmHg	<input type="text"/>
BP Diastolic	mmHg	<input type="text"/>
Pulse	per min	<input type="text"/>

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

Add/Edit Patient Transaction
Save
Cancel

Transaction Type:

COUNTER-REFERRAL

REFERRAL

Referral Date:*

External Referral:

Reason:*

Referrer Diagnosis:

Include Vitals:

Referral Status:

Admitted
 Unassigned
 Received
 Sent
 Assigned
Admitted
 Intake Complete
 Cancelled
 Inactive

Refer By:*

Refer To:*

Program:

Risk Level:

Requested Service: Clear

Improvements to Medications



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

Title	Formula	Drug(Units)	Dose(Refill)	Begin Date	End Date	Status	Notes	History
lurasidone (Latuda)	20 mg tablet	lurasidone (20 mg)	Take 1 tablet by mouth once a day as needed (0 of tablets :3)	06/20/2022		Active		History
simvastatin	80 mg tablet	simvastatin (80 mg)	Take 2 tablet by mouth twice a day as needed (0 of tablets :20)	06/20/2022		Active		History

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

Title	Formula	Drug(Units)	Dose(Refill)	Begin Date	End Date	Status	Notes	History
simvastatin	80 mg tablet	simvastatin (80 mg)	Take 2 tablet by mouth twice a day as needed (0 of tablets :20)	06/20/2022		Active		Deleted Medication History

Deleted Medication History link popup window

Deleted Medication History
This page gives the history of Deleted Medications

Title	Formula	Drug(Units)	Dose(Refill)	Quantity	Duration(days)	Begin Date	End Date	NDCID	Occurrence	Outcome	Comments	Notes	Deleted On	Deleted By
lurasidone (Latuda)	20 mg tablet	lurasidone (20 mg)	Take 1 tablet by mouth once a day as needed (0 of tablets :3)	3 tablet	3	06/20/2022	06/20/2022	63402030236	Unknown or N/A	Unassigned			06/20/2022 13:21:17	Administrator, Ensoftek

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

Report - Medication History

From Date: 06/01/2022 To Date: 06/19/2022 Records: 84

Drug: Provider:

Patient:

Note: Records in green indicates original medication. Remaining are history of the original medications.

First Name	Last Name	PID	Title	Formula	Drug(Units)	Dose(Refill)	Quantity	Duration(days)	Begin Date	End Date	NDCID	Occurrence	Outcome	Comments	Notes	Last Modified On
Vaishali	Alle	1833	parab-cetyl.stea's alc-p.gly-sls	parab-cetyl.stea alc-p.gly-sls	2 cleanser once a day as directed	not specified						Unknown or N/A	Unassigned	TESTING MEDICATIONS		
Vaishali	Alle	1833	parab-cetyl.stea alc-p.gly-sls	parab-cetyl.stea alc-p.gly-sls	2 cleanser once a day as directed	not specified						Unknown or N/A	Unassigned	TESTING MEDICATIONS		06/09/2022 10:08:27
Raj	Hotspot	1002521	acetaminophen (Tylenol)	325 mg tablet	acetaminophen(325 mg)	Take 5 tablet by mouth once a day (0 of tablets :10)	10 tablet 2		05/24/2022	05/26/2022	50580049660	Unknown or N/A	Unassigned			
Raj	Hotspot	1002521	acetaminophen	acetaminophen	Take 5 tablet by mouth once a day	10 tablet 2			05/24/2022	05/26/2022	50580049660	Unknown or N/A	Unassigned			06/02/2022 15:33:55

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.

General +				<pre> {webaddress} USERNAME: {username} NOTE: Please to inform you that, your password to access the portal will be sent you in separate email. </pre>
MOTS +				
BHDS +				
Quick DB Queries				
DrFirst XML Requests				
EDI +				
Feature Settings -				
Billing +				
Notification Center -				
Email +				
SMS +				
Notification Templates				
Interfaces +				
	Portal Welcome Email		Email	<pre> Dear {patientname}, Patient Portal Web Address: {webaddress} USERNAME: {username} NOTE: Please to inform you that, your password to access the portal will be sent you in separate email. </pre>
	Portal Registration Welcome Email		Email	<pre> Dear {patientname}, You have successfully registered with our site. For future reference, here are the details you entered. Patient Portal Web Address: {webaddress} USERNAME: {username} PASSWORD: {password} </pre>
	Portal Documents	portal_documents	Email	<pre> Portal document is uploaded to the patient {patientname}, by user {providername} </pre>
	Portal Credentials		Sms	<pre> Dear {patientname}, Patient Portal Web Address: {webaddress} Your Portal Username: {username} Portal Password: {password} </pre>
	OTP		Sms	<pre> Dear {username}, You OTP for login is: {otp} Sincerely, DrCloudEHR Team </pre>
	Offline Report Email		Email	<pre> <html><body>Dear {providername},

The Request you made at "{report_name}" on {date_time} is complete and ready to download. Please login to DrCloudEHR and go to {report_path}

This is a system generated email. If you encounter any issues accessing the report please reach out to DrCloudEHR support at support@drcloudemr.com.

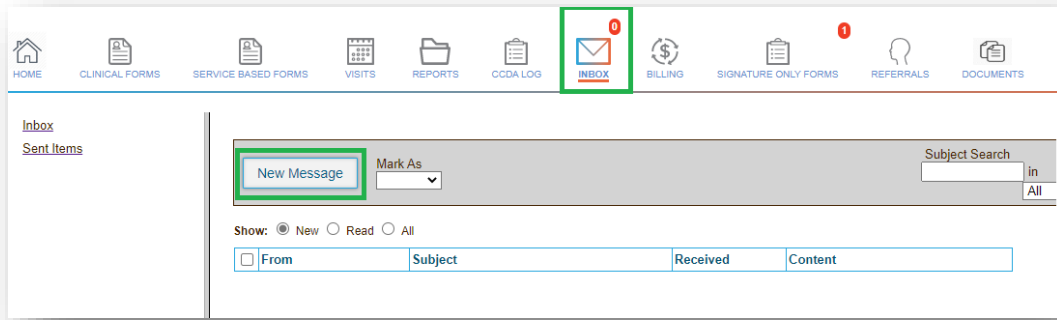
Regards,
DrCloudEHR Client Services.
</body></html> </pre>

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**.

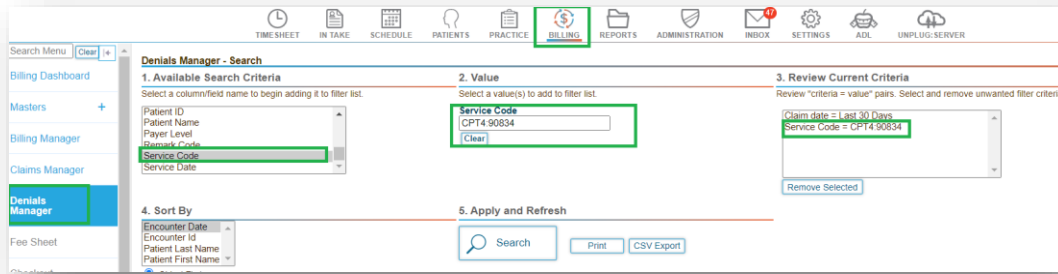


Billing

Filter Results in the Denials Manager using Service Code

Core

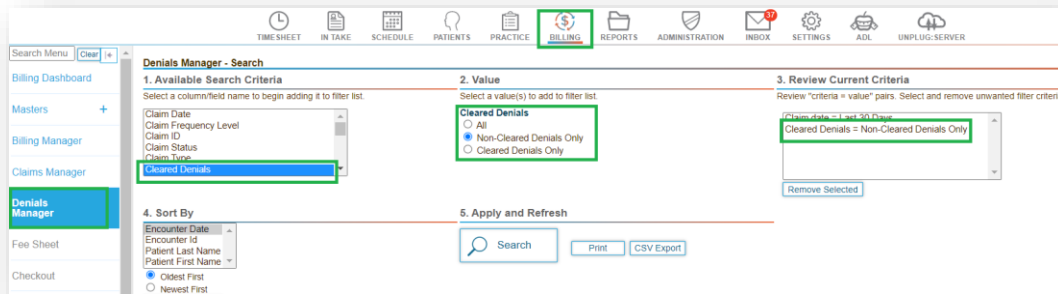
In the **Denials Manager**, users can now use the **Service Code** field to filter their search.



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**.

Statement Manager Settings
Below are the current statement manager settings.

Last modified: 06/16/2022 6:08 PM by Administrator, Ensoftek

Setting	Value
Statement Format	Version 2
Item Format (Version 2 only)	Detail View
Statement includes services received at	Service Facility
Facility address on Statement	Primary Business Entity Address
Download link expires in	30 Days
Print followup notes	No
Notify the user when statement is available	No
Limit number of patients per PDF to	100
Include only Closed encounters	No
Add to scheduler if patient count is more than	100
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).	Yes
Days from the Statement generation date to be the payment due date(Version 2 only).	No
Display Patient Statements based on the Payer at Statement Manager.	Yes

Generate Patient Statements

Patient: Facility:

From: To:

Include: Display overall balance

Check to generate from the first encounter Include only Closed encounters Collection Status:

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

Patient	Charge	Adjustment	Patient Paid	Insurance Paid	Balance for the reporting period
1	380.00	10.00	0.00	60.00	320
06/12/2022 10:01 AA(100225028) History	150.00	10.00	0.00	50.00	90.00
06/15/2022 6:43 PIA(100225108) History	30.00	0.00	0.00	0.00	30.00
06/15/2022 7:09 PIA(100225110) History	200.00	0.00	0.00	200.00	200.00

Display the User who Initiated the Real-Time Eligibility Check



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



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**.

The screenshot shows the 'Encounters' report interface. In the 'Manage Column(s)' section, the 'Show Claim Number(s)' checkbox is checked and highlighted with a green box. Below, a table of records is shown with a 'Claim(s)' column highlighted in green, containing values like 'P-1002511-1002412620(TEST)'.

Provider	Date	Duration (Mins)	Unit(s)	Patient	External ID	PID	Category	Claim(s)	Billing Status	Encounter Status	Enc No
Administrator, Ensoftek	06/20/2022 12:48 PM	60	1	HPP, LAPTOPP	1002511	1002511	Adolescen A&D Residential Treatment	P-1002511-1002412620(TEST)	Open	Open	10022521
Administrator, Ensoftek	06/20/2022 12:53 PM	15	1	Hotspot, Raj Test	1002521	1002521	File Note		Open	Open	10022521
Administrator, Ensoftek	06/20/2022 2:08 PM	45	1	Alle, Vaishali	1833	1833	Caseworker Intake		Open	Open	10022521

Option to Display Encounter Supervising Provider in the Provider Service Report



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

The screenshot shows the 'Provider Service Report' interface. In the 'Manage Column(s)' section, the 'Supervisor' checkbox is checked and highlighted with a green box. Below, a table of records is shown with a 'Supervisor' column highlighted in green, containing values like 'Administrator, Ensoftek'.

Provider	Date	Duration (Mins)	Units	Patient	PID	Category	Billing Status	Supervisor	Facility	Service Code(s)	Contract Amount	Charge	Adjust	Paid	Insurance	Insurance Type	Telehealth
Administrator, Ensoftek	13/06/2022 14:30:27		1	Alle 1, Vaishali	28686	1-ABH Commercial - No Show Doctor Visit	Closed	Administrator, Ensoftek	AFRH @ 2020		0.00	0.00					
	13/06/2022 14:46:36		1	Alle 1, Vaishali	28686	ABH forms	Closed	Administrator, Ensoftek	AFRH @ 2020		0.00	0.00					

Option to Display Insurance Type



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

The screenshot shows the 'Provider Service Report' interface. In the 'Manage Column(s)' section, the 'Insurance Type' checkbox is checked. Below this, a table displays encounter data with the 'Insurance Type' column highlighted in green.

Provider	Date	Duration (Mins)	Units	Patient	PID	Category	Billing Status	Encounter Status	Enc #	Encounter Facility	Service Code(s)	Contract Amount	Charge	Adjust	Paid	Insurance	Insurance Type				
Administrator, Ensoftek	20/06/2022 16:29:00	15	1	2022, July Release	29189	Individual Psychotherapy (40 mins)	Closed	Open	852214	Yellow Bricks	90834:1	67.90	100.00		0.00	Primary: UMR	Group Health				
Total Duration for Administrator, Ensoftek		15	1																		
Grand Total												15 (0h 15m)	1					67.90	100.00	0.00	0.00

Net Revenue Report

The screenshot shows the 'Report - Net Revenue' interface. A table displays encounter data with the 'Insurance Type' column highlighted in green.

Facility	Insurance	Insurance Type	Provider	Patient	Invoice	DOS	Service Code	Charges	C A
Purple Facility	zzzValue Options (Medicaid)	Public	Administrator, Ensoftek	Vaishali S Alle	32.851943	10/06/2022 10:1:TM	500.00	-	
Provider (Administrator, Ensoftek) Total(s)								500.00	0.00
Insurance (zzzValue Options (Medicaid)) Total(s)								500.00	0.00
Facility (Purple Facility) Total(s)								500.00	0.00
Greater Washington Psychiatry & Counseling	WELLNET HEALTHCARE-AETNA	Public	reddy, yellas	THINK PAD	29186.852118	03/06/2022 KYR:123	1.00	-	

Receipts Summary Report

Date of service: 01/05/2022 to 20/06/2022
 Sort By: Date of Service
 Encounter Facility: [Select Facility(s)]
 Paying Entity: [Select]
 Posted by: [All] Service Code: [] Check #: []

Method Date of Service Invoice Posted By Patient Policy DOS Provider Procedure Charges Adjustments Payment Insurance Type Check# Copay

Records: 33

Method	Invoice	Posted by	Patient	Policy	DOS	Provider	Procedure	Charges	Adjustments	Payments	Insurance Type	Check#	Copay
BEACON HEALTH OPTIONS/VALUE OPTIONS	29168.851403	yellas reddy	ACCESS, SUZUKI	123	27/05/2022	yellas reddy	90785	10.00	0.00	10.00	Medicaid		0.00
	29168.851083	yellas reddy	ACCESS, SUZUKI	123	25/05/2022	yellas reddy	90791	100.00	2.00	10.00	Medicaid		0.00

Total for BEACON HEALTH

Option to Filter Based on Location of Service in Multiple Reports



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

Collections Report

Facility: Mental Health Provider: [] Patient: First,Last(PID/HRN)
 Whether Insured: All Insurance: [] Report Type: Open Service Type: Billable Services Invoice Details:
 Age By: Service Date Group By: Days Months Aging Columns: 3
 Location: All POS: []

Without Update

Name	Location	POS	SSN	Phone	Follow Up Reason	Invoice	Svc Date	Charge	Adjust	Paid	Balance	Jun 22	May 22
5Pro, Realm 5		11:Office	XXX-XX-1111					210.00	0.00	0.00	210.00	0.00	0.00
5Pro, Relame F	Mental Health	55:Residential Substance Abuse Treatment Facility						120.00	0.00	0.00	120.00	120.00	0.00
ABH, Test K	Mental Health	03:School		111-111-1111				40.00	0.00	0.00	40.00	40.00	0.00

Provider Service Report

Report filters: Insurance: All, Building: --All--, Bill-To: All, Service Type: Billable Services

Encounter No: [], Encounter Type: All, POS: []

Location: Columbia Pacific CCO (Orig)

Options: Show encounters that do not have forms, Show only Encounters with Incomplete Forms, Show Encounters that do not have Feesheet

Manage Column(s): Provider, Date, Duration (Mins), Units, Patient, Patient Status, DOB, Age, External ID, PID, Category, Billing Status, Encounter Status, Supervisor, Enc #, Encounter, Facility, Building, Family, Bill-To, DX Code(s), Service Code(s), Service Code Description, Contract Amount, Charge, Adjust, Paid, Time of service payment (Co-Pay), Insurance, Telehealth, Physical Location, Location, POS, Insurance Type

Total Number of Encounter(s): 2

Provider	Date	Duration (Mins)	Units	Patient	DOB	PID	Supervisor	Enc #	Location	POS	Facility	DX Code(s)	Service Code(s)	Contract Amount	Charge	Adjust	Paid	Ins Typ
Administrator, Ensoftek	06/20/2022 6:32 PM	15	1	Hotspot, Raj Test	04/08/2021	1002521	Kanakanti, Seyon	1002523	Columbia Pacific CCO	11:Office	Mental Health		90832	0.00	100.00	10.00		Me

Net Revenue Report

Service Type: Billable Services, Details, Display Subtotals

Location: Mental Health (Facility), POS: []

Records: 2

Facility	Insurance	Insurance Type	Provider	Patient	Invoice	DOS	Service Code	Location	POS	Charges	Contract Amount	Expected Contractual Adjustment	Transaction Payments	Adjustment
Mental Health	CIGNA (WESTERN GROCERS)	Commercial	Administrator, Ensoftek	LAPTOPP HPP	1002511.100225214	06/20/2022	90834-GT	Mental Health	55: Residential Substance Abuse Treatment Facility	120.00	-	0.00	0.00	0.00
Provider (Administrator, Ensoftek) Total(s)										120.00	0.00	0.00	0.00	0.00
Insurance (CIGNA (WESTERN GROCERS)) Total(s)										120.00	0.00	0.00	0.00	0.00

Receipts Summary Report

Sort By: Date of Service

Encounter Facility: [], Paying Entity: []

Posted by: [], Service Code: [], Check #: []

Location: Redmond Outpatient (Locat), POS: []

Options: Details

Manage Column(s)

Records: 1

Method	Date of Service	Invoice	Posted by	Patient	Policy	DOS	Provider	Procedure	Charges	Adjustments	Payments	Location	POS	Insurance Type	Check#
Aetna	06/20/2022	1002521.100225214	Ensoftek Administrator	Hotspot, Raj Test		06/20/2022	Ensoftek Administrator	90791	300.00	0.00	15.00	Redmond Outpatient	11:Office	Medicare	121212
Total for Aetna											15.00				
Grand Total											15.00				