

A background image of a smiling woman with her hair wrapped in a patterned headscarf, looking upwards and to the right. The image is semi-transparent and overlaid on a blue background.

DrCloudEHR™ April Release Notes

Release to Staging Site – March 26, 2023

Release to Production Site – April 02, 2023

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Overview

This document contains the Release Notes for April 2023. Upon receipt, please review and test these 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 the release



Add-on

Requires purchase and additional setup

Please note, the terms ***client***, ***patient***, and ***individual*** are used interchangeably throughout this document depending on the nature of the feature.

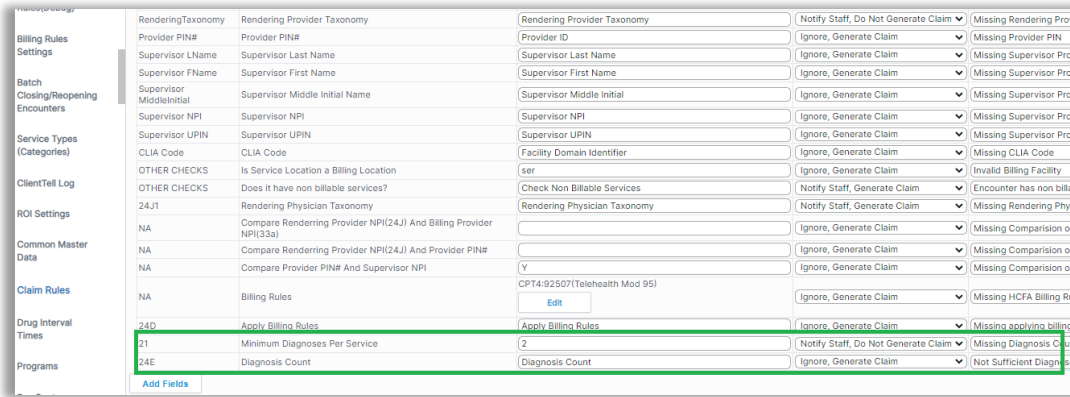
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Practice

Added support for multiple diagnoses to Claim rules

Core

Now Authorized users can configure Claim rules for multiple diagnoses and alert the user when a claim is generated and submitted when the CMS-1500 claim form is missing the number of diagnoses captured in the rule.

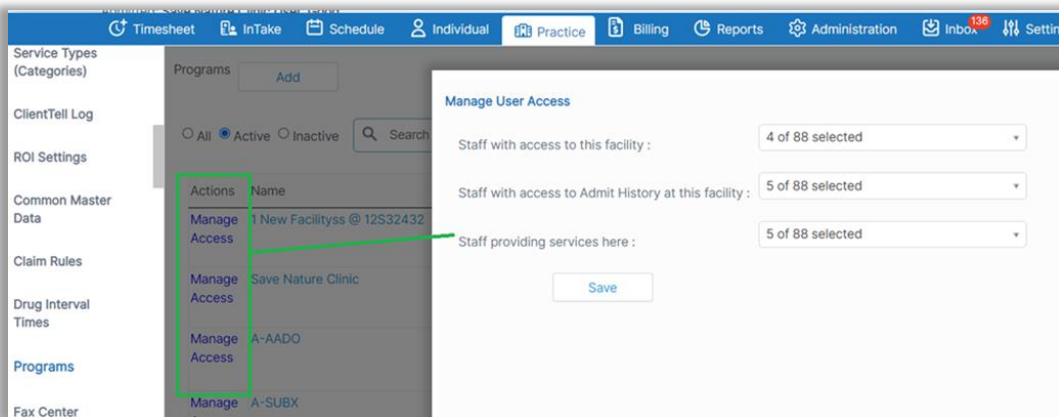


Note: The system checks for all the service codes, if a service code doesn't have sufficient diagnosis codes (justification), then it will not create the claim for that encounter.

Ability to assign admit history, access, and service facilities in one interface when adding new facilities

Setup

DrCloudEHR now includes a "**Manage Access**" link on the Facility/Programs administration page to easily assign staff access to admit history, facility, and services for multiple users at the same time.



Billing

Added the ability to review/edit/submit claims from the denials manager



Authorized users can now **"Save & Submit"** the claim from the Denials Manager itself. Also includes a **"Clear Claim"** option to remove the claim from the denials queue.

The screenshot shows a detailed claim form with various fields for patient information, provider details, and charges. At the bottom of the form, three buttons are highlighted with a green border: "Save", "Submit", and "Clear Claim".

Billed Payer type details are included in the encounter and fee sheet.



DrCloudEHR now shows the Billed Payer type e.g., **"Billed to Ins1"** for primary insurance and **"Billed to Ins2"** for secondary insurance in the encounter and fee sheet.

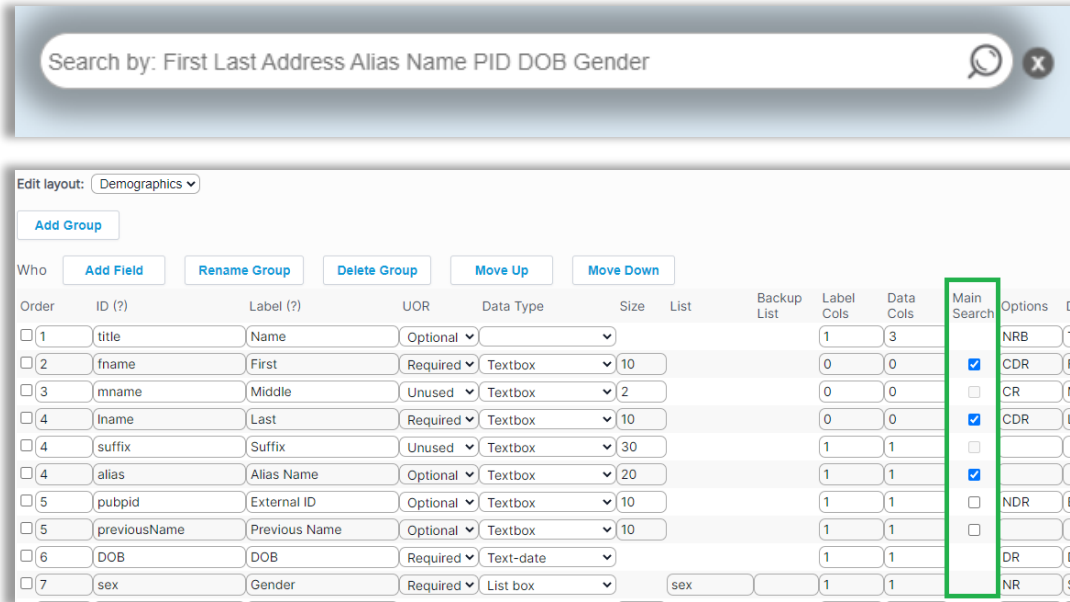
The screenshot shows a patient encounter page for "Think Pad (10028)". The page includes patient details, insurance information, and a navigation bar. In the navigation bar, the "Billing" tab is active, and a button labeled "Billed to Ins1" is highlighted with a green border.

Patients

Option to add/configure additional fields to the "Main Search".

✔ Core

DrCloudEHR now provides the option to add/configure up to 10 additional fields for the "Main Search".

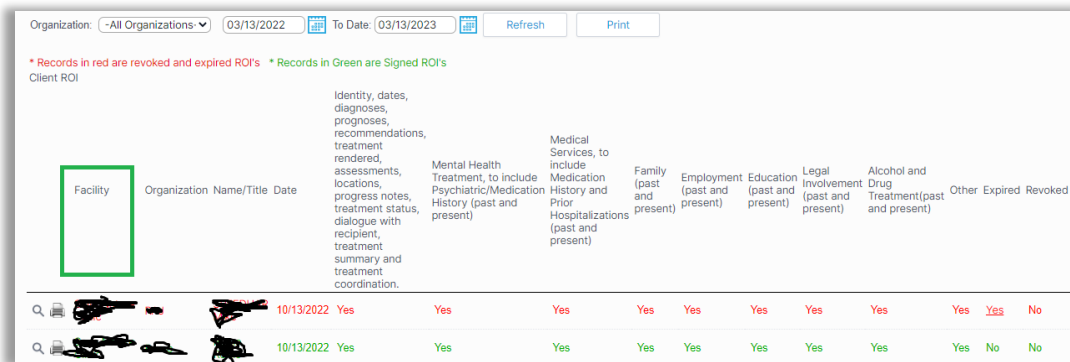


Note: At present this functionality is integrated for only existing and new text box fields only.

Ability to re-order ROI Dashboard headers

✔ Core ⚙ Setup

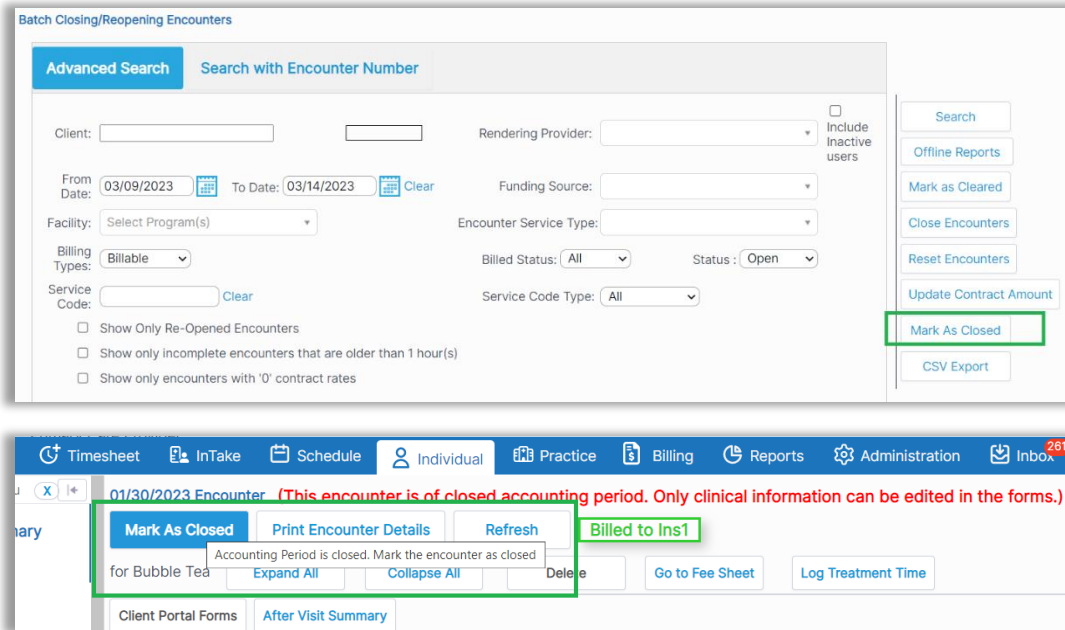
You can now reorder the ROI Dashboard headers to your agency's preference. A new column has been added to assist with identifying the ROI for a program/encounter facility.



Ability to close a billed encounter when the accounting period is closed

Core **Setup**

DrCloudEHR now supports closing a billed encounter even when the accounting period is closed. This is configured using a global flag to enable the **"Mark as Closed"** button in batch open/close encounters.

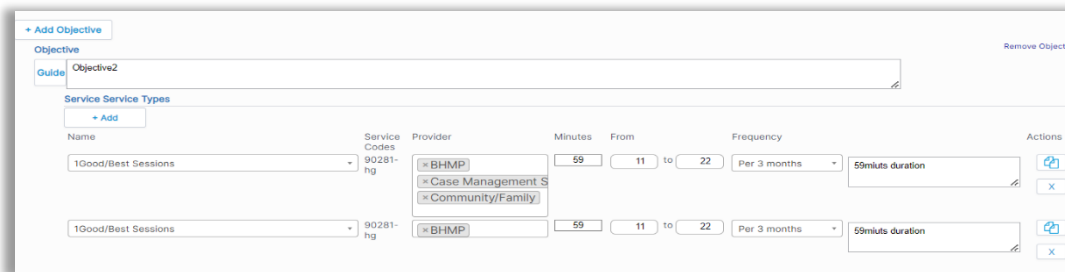


Multi-select dropdown for the Provider field in the Service Categories section of MDTP

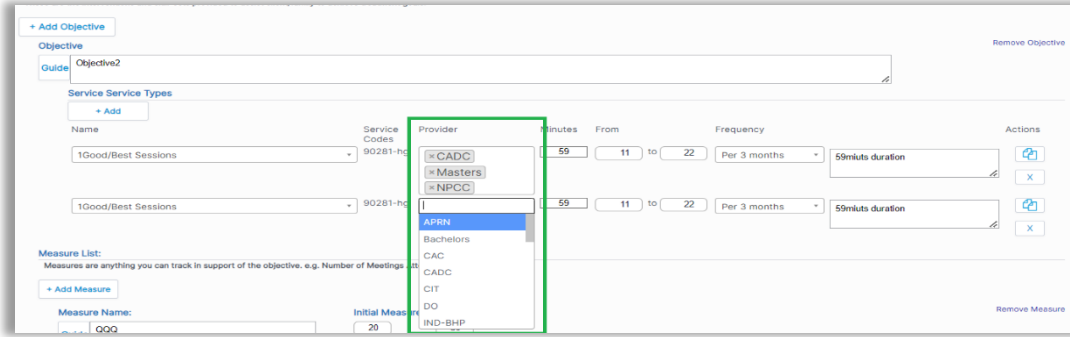
Core **Setup**

DrCloudEHR now provides two multi-select dropdowns for the Provider field in the Service Categories section of MDTP.

- 1) Administration > Lists > Responsible Roles
- 2) Practice > Administration > User Certification List



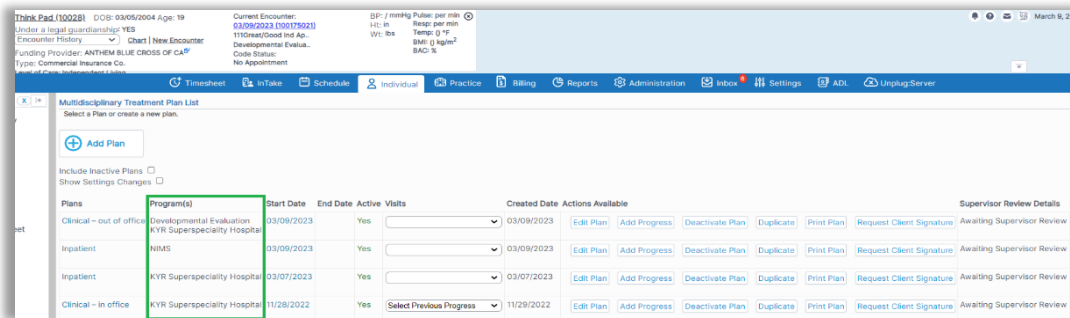
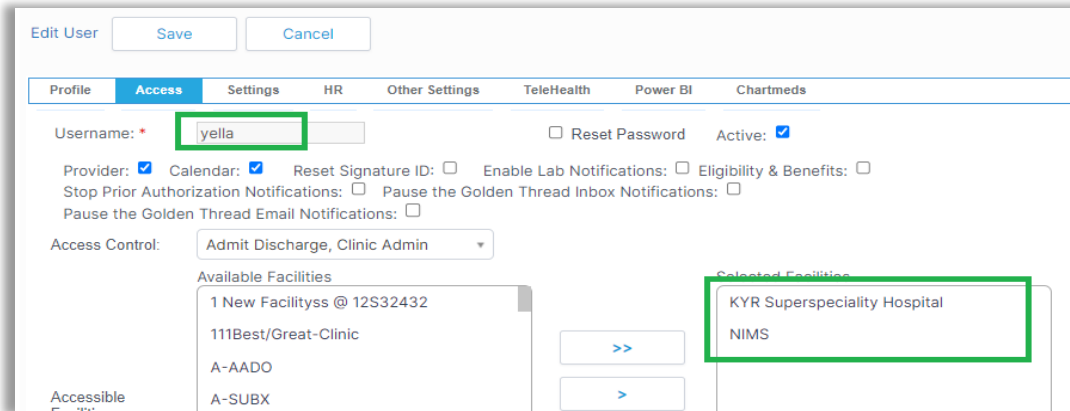
Note: The new global flag "Show User Certification List at MDTP - Service Categories - Provider" must be enabled to see the User Certification List.



Multi-Disciplinary Treatment Plans (MDTP) visibility based on selected programs and the user's accessible facilities

Core Setup

DrCloudEHR now includes an option to configure MDTP access based on selected programs and accessible facilities.



Reports

Added support to clear amounts due when billed to primary, if secondary billing is not needed.

Core Setup

Authorized users can now clear the amount due once primary payer is billed and billing to secondary payer is not needed.

Manage Column(s)											
Total Number of Encounter(s): 11											
	Date	Client	DOB	PID	Enc #	Facility	Service Code(s)	Funding Source	Funding Source Type	Encounter Type	Billed To
Appointments and Encounters By Provider	01/02/2023 10:38 PM	Pad, Think	05/03/2004	10028	100173820	Save Nature Clinic	90283	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	
Provider Productivity Report V2	01/02/2023 10:45 PM	Pad, Think	05/03/2004	10028	100173823	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins3
Encounters	01/02/2023 11:08 PM	Pad, Think	05/03/2004	10028	100173831	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
	01/03/2023 1:23 AM	Pad, Think	05/03/2004	10028	100173835	A-SUBX	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
Provider/Counselor Productivity report	01/03/2023 1:31 AM	Pad, Think	05/03/2004	10028	100173836	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins2
Progress Note	01/03/2023 2:42 AM	Pad, Think	05/03/2004	10028	100173843	Campbell	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
	01/03/2023 3:07 AM	Pad, Think	05/03/2004	10028	100173849	CDS/Floortime	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
Provider Service Report	01/03/2023 3:16 AM	Pad, Think	05/03/2004	10028	100173853	APOLLO	H2021	Primary: DISNEY CHILDREN'S CENTER	Commercial	Billable	Ins1
	01/03/2023	Pad, Think	05/03/2004	10028	100173854	APOLLO	90283	Primary:	Commercial	Billable	Ins2

Patient Information Banner

Added support to display Patient preferred name in Patient Info Banner

Core **Setup**

Authorized users can now configure the preferred name displayed for a patient in the **Info Banner**. This setting applies to all patients in the system. Following options are available, Name, Middle Name and Last Name. You can submit a ticket to have these options configured.

	Display Preferred Language	<input checked="" type="checkbox"/>
HEADER BANNER	Display Preferred Name	<input type="checkbox"/>
FEATURES	Display Preferred Name under Encounter History	<input type="checkbox"/>
FORM SPECIFIC	Set Patient Preferred Pronouns table column	<input type="text" value="Pronouns"/>
PORTAL	Set Patient Preferred Name table column	<input type="text" value="Lived_First_Name"/>
CLIENTELL	Set Patient Preferred Middle Name table column	<input type="text"/>
CHARTMEDS EMAR	Set Patient Preferred Last Name table column	<input type="text"/>

New ACL to hide the “Add” button on the Address Book.

Core **Setup**

Authorized users can restrict who can **Add** addresses to the **Address Book** by adding the ACL ‘Restrict user from adding new address at Address Selection page’ to identified staff. When enabled the Add button is not available on the address book at Encounter, Schedule, ROI, and Send Fax.

Ability to add/update a Contact Record in Form Builder

Core

DrCloudEHR Form Builder now includes a new **Field Type** to update other contacts for a patient tied to the option in the Patient Demographics page. This will update the list of all existing other contacts of a particular patient.

Users can choose the other contact from the lookup window, and the address details of the selected other contact will **auto-populate** on the form fields. Additionally, a new contact can also be added from the lookup window.

Name/Title	Relationship	Email	DOB	Address	City	County	State	Zip Code	Home #	Cell #	Other #	Work #
[REDACTED]		testPran@gmail.com	0000-00-00									65565656
[REDACTED]		valshali@gmail.com	0000-00-00	EDEN-A-709, Casa Paradiso	Hyderabad	Telangana	CA	500018	541-535-6239	111-111-11	222-222-2222	333-333-3333
[REDACTED]	Father	Test@mail.com	2022-02-01	1307 W Main St	Medford	Oregon	OR	97501	541-535-6239	111-111-11	222-222-2222	333-333-3333
[REDACTED]		sreedhark@drcloudemr.com	0000-00-00									WEWEW

ROI Form Builder

Added an "Address Book" to ROI Form Builder and Fax Center

Core

DrCloudEHR now provides access to the Address Book on the ROI type forms and the fax center.

ROI Form Builder:

RELEASE TO

Release to (entity name)
write your answers here **Select Address**
Click to select Address

Contact person **Phone number**
write your answers here write your answers here

Address, City, State, and ZIP
write your answers here

Email address **Fax number**
write your answers here write your answers here

Inter Fax:

Send Fax

Select Address

Fax number(s)*: eg: +12323454567;+12323454568

Contact*:
(eg: Rachel Burns; Albie Eins)

Subject*:
(This is what will appear on the subject of the fax cover sheet.)

Cover Note :
(This is what will appear on the message area of the fax cover sheet.)

Reply to email*:

Attach File*: **Choose File** No file chosen
(Supported File Types: jpg, jpeg, png, pdf, doc, docx)

Send **Cancel**

Patient Portal

Ability to view and print Multi-Disciplinary Treatment Plans (MDTP) in the Patient Portal

Core

Multi-Disciplinary Treatment Plans can now be viewed/printed from the **DrCloudEHR Patient Portal** under Clinical Forms/Visit Forms. The Patient Portal also provides the ability for the Patient or guardian to sign the MDTP.