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DrCloudEHR™
April Release Notes

Release to Staging Site – March 26, 2023

Release to Production Site – April 02, 2023

Table of Contents

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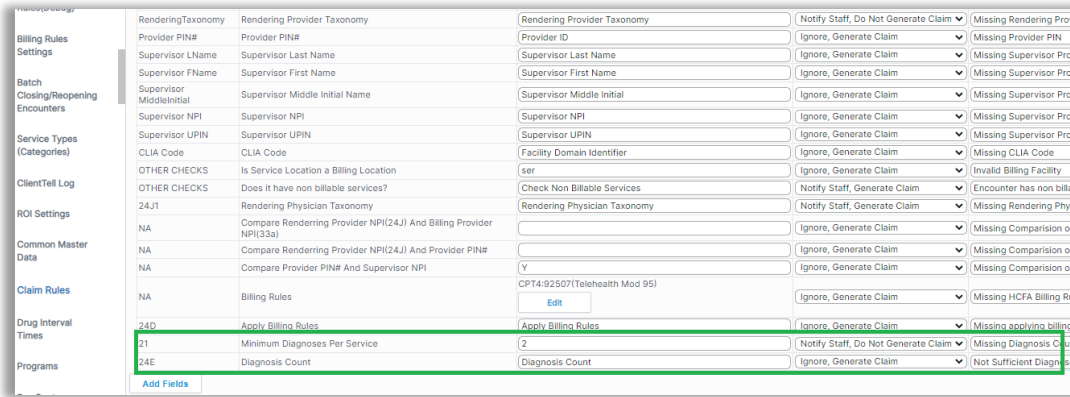
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

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.
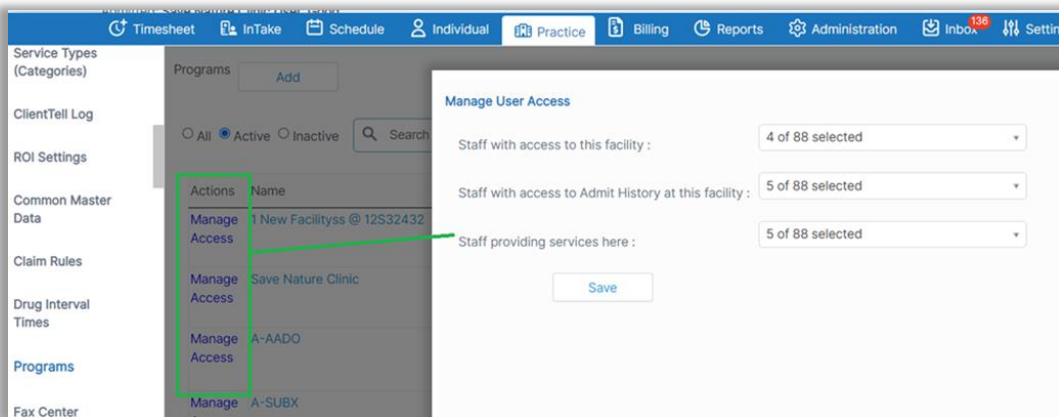

Note: *The system checks for all the service codes, if a service code doesn't have sufficient diagnosis codes (justification), then it will not create the claim for that encounter.*

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

☑ **Core**   ⚙ **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

✅ **Core**

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.

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

✅ **Core**   ⚙ **Setup**

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.
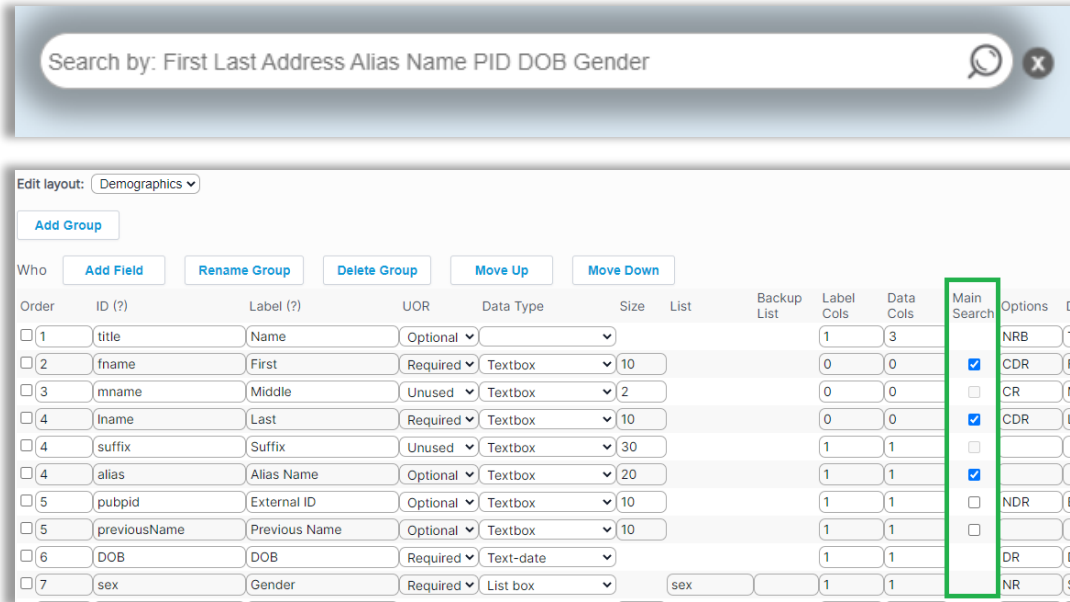
Patients

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

☑ Core

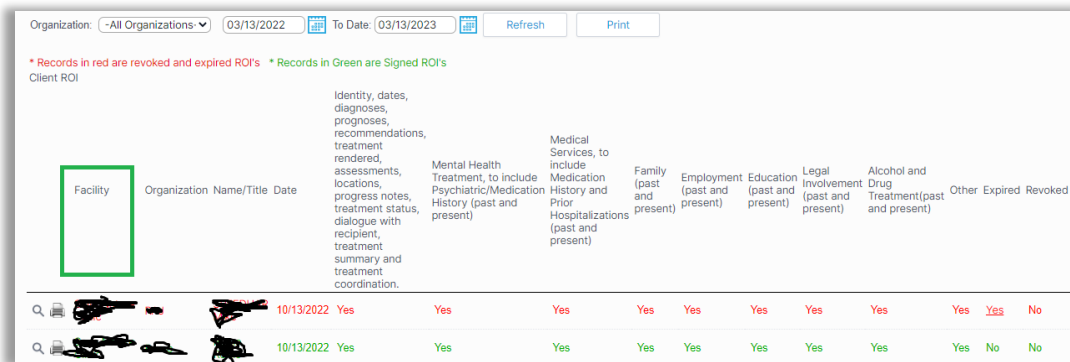DrCloudEHR now provides the option to add/configure up to 10 additional fields for the **"Main Search".**

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

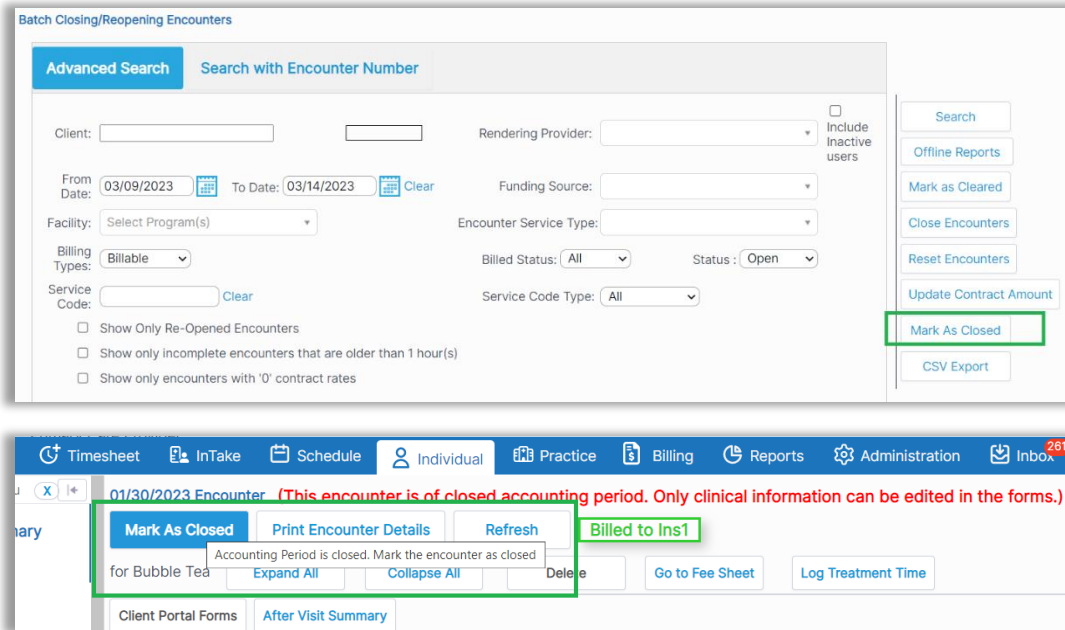## *Ability to re-order ROI Dashboard headers*

☑ 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.
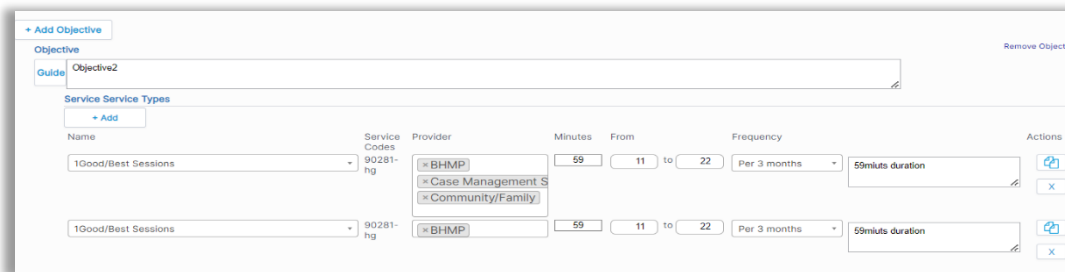

Multi-select dropdown for the Provider field in the Service Categories section of MDTP
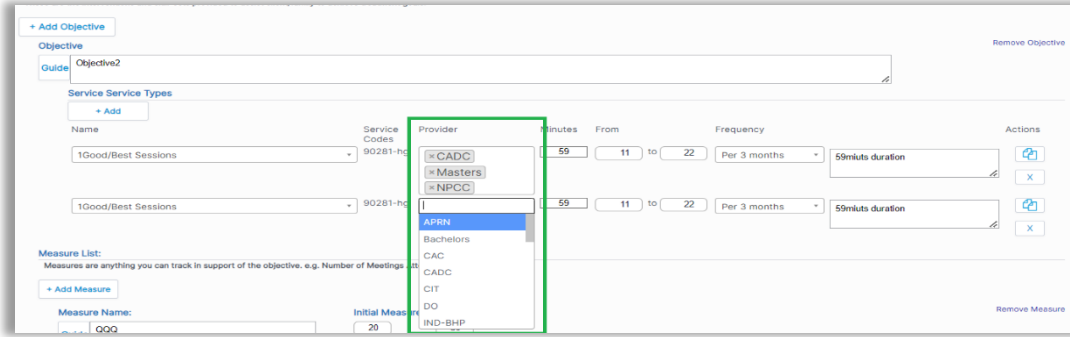
☑ Core ⚙ Setup

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

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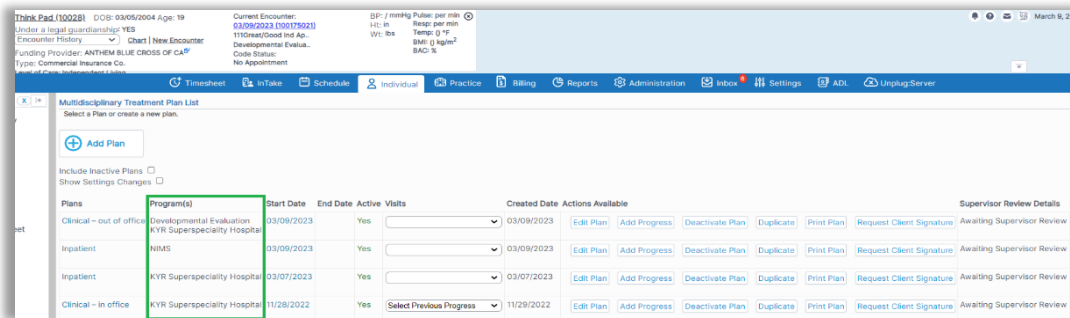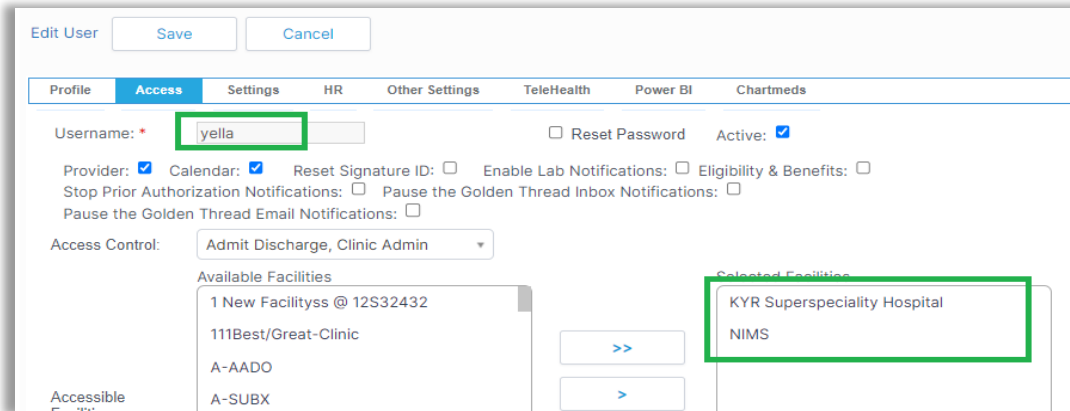2) Practice > Administration > User Certification List

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.

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.

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.

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:

Inter Fax:

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.