



# DrCloudEHR™ August Release Notes

Release to Staging Site – July 24, 2022

Release to Production Site – July 31, 2022

## Table of Contents

Overview .....	3
Clients.....	4
Improvements to Emergency Access.....	4
Practice .....	5
Option to Email Statements to Clients.....	5
Billing.....	6
Filter Search Results in the Billing Manager Based on the Modifier Field.....	6
Reports.....	7
Included Email Address Column in Birthday List Report.....	7
New Search Criteria in Net Revenue Report.....	7
Form Builder .....	8
Section-Level Access to Form Builder Forms .....	8
Other Changes .....	9
Enhanced Security at Change Password .....	9
Exclude the Instructions Page when Printing Statements.....	9

## Overview

This document contains the Release Notes for August 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

*Please note that 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, don't hesitate to contact our support team at [support@drcloudemr.com](mailto:support@drcloudemr.com).

# Clients

## Improvements to Emergency Access


Core  Setup

Authorized users with Emergency Access can now see exluded clients in the search results using the new search screens. When this feature is enabled, a lock icon will be displayed for clients in the exclusion list. Users will need to provide their signature password in order to enable access. All access will be logged for auditing purposes.

**Search Panel**

Filter Criteria


Filter Options:

 Search

**Results List**

List of Search Results that match the provided search criteria. 1 - 1 of 1

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]	Room #	Level Of Care	Primary Care Provider
	5Pro, Realm 555	04/01/2022	Male				XXX-XX-1111	1002497	1002497			Advanced Health C...	92		05/31/2022 (49)		Independent Living	

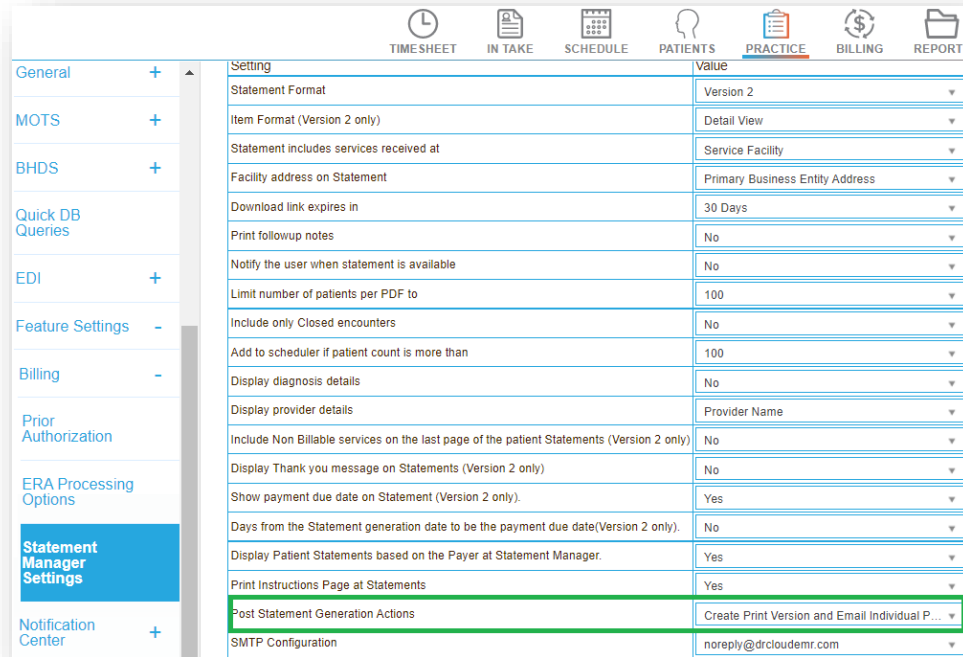
 Click to unlock the Individual

# Practice

## Option to Email Statements to Clients

Core Setup

Now authorized users can generate and email statements to clients. In addition to the default option that creates a printable/downloadable version of the statement, the system can be configured to email each client their individual statements using their associated email address.

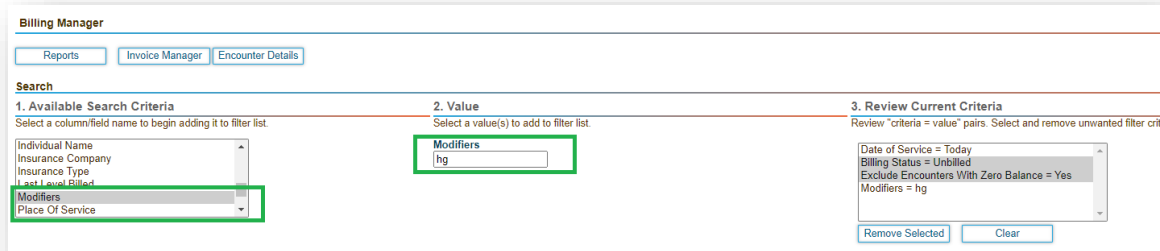


# Billing

## Filter Search Results in the Billing Manager Based on the Modifier Field



There are now new search criteria in the **Billing Manager**, allowing users to filter their search results using the **Modifier** field.



# Reports

## Included Email Address Column in Birthday List Report



In the **Birthday List** report, there is now an additional field to display the client’s email address.

Report - Birthday List

Month:  Admit Facility:

Search  
Print  
CSV Export

Total Number Of Patients: 4

First Name	Last Name	DOB	PID	Age	Provider	LOC	Room	Street	City	State	Zip	Home Phone	Email Address
Green	Land	15/06/1976	1002568	46	Specialist, ENT	LT		Flat No # 12, Plot No. 209	Humeston	FN	50123	790-930-9090	pkishorer@drcloudemr.com

## New Search Criteria in Net Revenue Report



In the **Net Revenue Report**, users can filter their search using the **Adjustment Description** field. Additionally, the **Adj Description** and **Adj Group Code** fields will be displayed accordingly in the **Transactions** section of the results.

Report - Net Revenue NOTE: This reports on Billable encounters only

Encounter Facility:  Encounter Provider:  Insurance:

Individual:

By:  From:  To:  Service Code:

Service Type:  **Adjustment Description**

Details  Summary  Display Subtotals

Records: 1

Facility	Insurance	Insurance Type	Provider	Individual Invoice	DOS	Service Code	Charges	Contract Amount	Expected Contractual Adjustment	Transactions					
										Payments	Adj Amount	Adj Description	Adj Group Code	Date of Pmt	Chk No
Residential															
Residential			doctor, Immunologist												
			Test Practice	1002513.100224011	04/10/2022	H0019-UA	750.00	-	0.00	30.00	0.00			07/18/2022	000000013453

# Form Builder

## Section-Level Access to Form Builder Forms

Core  Setup

Users can now configure section-level access to **Form Builder** forms, providing access to specific sections of forms. The options are as follows:

- Readonly – User(s) can only view the section fields
- Write – User(s) can edit the data of the section fields
- Hide – User(s) is not able to view the section fields



The screenshot shows the 'Edit Section' configuration interface. At the top, there are three buttons: a back arrow, 'Preview', and 'Save Template'. Below these is the 'Edit Section' header and a sub-header 'Update section name and description.'. The form is divided into three main sections: 'Section Name', 'Section Description', and 'Access Control'. The 'Section Name' section has a text input field containing 'Section 2' and a checkbox labeled 'Show Section Name' which is checked. The 'Section Description' section has a text input field containing 'Section Description' and a checkbox labeled 'Show Section Description:' which is unchecked. The 'Access Control' section features a list of user roles with their access levels: 'EnSoftek Administrators(write)', 'zClinicians(hide)', 'zPhysicians(write)', and 'zSupervisor(readonly)'. Below this list is the instruction 'Please select Access Control.'. At the bottom left of the form is a 'Save' button. Additionally, there are two checkboxes at the bottom: 'Show Horizontal Rule:' (checked) and 'Print Section on New Page' (unchecked).



## Other Changes

### Enhanced Security at Change Password



When a user is changing their password, there is now a field to enter the old password, validating the user and decreasing the likeliness of security risks.

### Exclude the Instructions Page when Printing Statements



There is now the option to remove the instructions page when printing statements.