

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.

05/04/2022 Encounter Close Encounter Print Enc	ounter Details
Expand All Collapse All	Delete
Patient Portal Forms	
Upload Documents: Choose Files No file chosen	Upload
Documents attached to this encounter:	
Date Time Document Name View Rename Download Delete	

Upload Documents in the 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 the 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**.

Documents	Clinical View Billing View Documents View (Balance Due: 40.00)		
Upload Doc	ument(s): Choose Files No file chosen Category: Portal Documents Submit		
Date	Document	Facility	
05/19/2022	Document: 1002225711_0511202115_2_1.pdf (Portal Documents)		
05/19/2022	Document: image_2.jpg (Portal Documents)		
05/19/2022	Document: 1002225711_0511202115_2.pdf (Lab Report)		
05/19/2022	Document: MicrosoftTeams_image.png (Portal Documents)		
05/19/2022	Document: image_1.jpg (Portal Documents)		
05/19/2022	Document: unnamed_3.png (Portal Documents)		
05/19/2022	Document: unnamed 2.png (Mid America Lab)	Lee County	

Client's Chart – Documents View



Client Portal – D	ocuments –	Received	Folder
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К	SERVICE BASED FORM				SIGNATURE ONLY FORMS	REFERRALS	DOCUMENTS
Received Sent	Documents R	eceived					
	Data Timo	Document Name	Viou	Download			
		unnamed_3.png		⊥			
	05/19/2022	MicrosoftTeams_image.png	٩	⊥			
	05/19/2022	image_2.jpg	9	⊥			
	05/19/2022	1002225711_0511202115_2_1.pdf	9	⊥			

Client Portal – Documents – Sent Folder

	SERVICE BASED FORMS	000 0000 VISITS		CCDA LOG		
<u>Received</u> <u>Sent</u>	Documents Sent	t(s): Choos	e Files No fi	e chosen		_
	Document Catego	ory: Portal Do	ocuments s	ubmit		
	 Date Time Doc 05/19/2022 imag		e View Down		 	

Report on Upcoming Appointments in the Service Report

Core

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

atient Summary										(
hart	Patient Info Clinical	Documents Reports	Other EDI	External	Links Delete	Client	eactivate the Clie	ent 📜 🕇	=	
Aessage Patient										
atient earch/Add	Billing (collapse)	Service Report	From date: 0	19/2022	To date: 0	/18/2022			_	os (c
atient Education	Total Balance Due: 793.00 Patient Responsibility: 116.	Session: All Program: Select Program(s)	Order By: Dat			Cancelled App	-	Submit		2 4
dminister Aedications	Billing Note: Client is insured Payments Receipts Statem	Send Fax Pi	rint CSV Export	Cl	ose					10 11 27 16 26 25
atients acesheet	Edit Demographics	Session Name	Session Date/Time	Program	Attendance Sessio	n Payment Type	Payment Method		Balance Due	ince [
acesheet	Edit Demographics	Individual Psychotherapy (40 mins)	0 05/18/2022 09:30 AM - 10:31 AM	Program Yellow Bricks		Type	Method N/A	Paid N/A	Due N/A	ince [
atients acesheet uuthorizations Care Plan		Individual Psychotherapy (40	0 05/18/2022 09:30 AM - 10:31 AM	Yellow	Attendance _{Fee}	Type	Method N/A	Paid	Due N/A	ince I



Update 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.

Patient Info Clinical Documents	Reports Other EDI External Links Delete Client Deactivate
	Add Form
Billing (collapse)	Existing Encounter :
Total Balance Due: 793.00 (Non-Billable Balance Patient Responsibility: 116.00 Due from Payer: 6	New Encounter
Billing Note: Client is insured Payments Receipts Statement Authorization 1	
rayments receipts statement Authorization r	
_	

New Show Incomplete Forms

Core

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

Prescribe	 showing incomplete forms by ogged-in user 	HEET IN TAKE SCHEDULE CLENTS PRACTICE BILLING REPORTS ADMINISTRATION INBOX SETTINGS
New Incident	Encounter Forms Clinician Psychotherapy Note	Date of Service: Category 05/16/2022 Individual Psychotherapy (40 mins) Encounter:850860
View Incidents	0%	Clinician Psychotherapy Note
Infection Control Log	Consent Forms ABH Medication Informed Consent	Client : June Release2022 Date : 05/16/2022 Prior Authorization # :
Contact Log	0%	Start Time : 11:04 AM Stop Time : 11:19 AM Place of Service : 20: Urgent Care Facility Service Code : CPT4:90834-1~Adult Individual Psychotherapy (40min)
SE Employer Contact Log	1	CP14/90034-1~Aduit individual Psychotherapy (40min)
Sleep Log		Present : Comments :
Show ncomplete		
iorms		Goals :
BIRP Form		

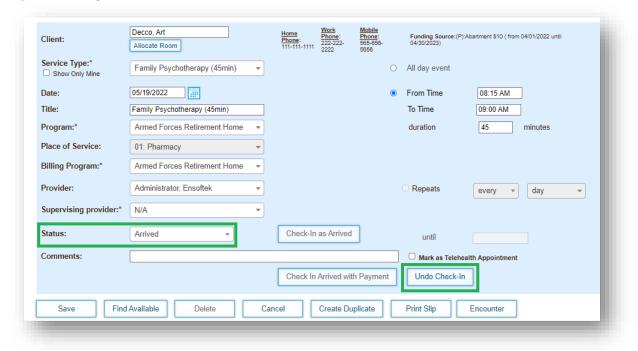


Schedule

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 that this will also delete the associated encounter and any forms that may have been added.



Before selecting Undo Check-In button

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

you wish to undo the panter, Forms and Payme in will be reversed and	ents if any auto cre	0
	Confirm	Cancel



New 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

Check-in notes : 04/14/2022	17:11 (Ensoftek Administrator) Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lore	m Ipsum has been the industry's s	tandard dum more
Client:	Decco, Art Decco, Art	Home Work Mobile Phone: Phone: Phone: 111- 222- 666- 1111 2222- 5656	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 To Duration 08:15 AM 09:00 AM 45 min	Place of Service:	01: Pharmacy
Recurrence:	□ Repeats every ▼ day ▼ until	*Billing Program:	Armed Forces Retirement H
*Program:	Armed Forces Retirement Home		
Provider:	Administrator, Ensoftek *	Event Address: Select Address	
*Supervising provider:	Examiner, Medical 💌		
Status:	None Check in Create Encounter with Start Time As: O Appt Time Check-in Time 		
Comments:			Mark as Telehealth Appoint

Fee Sheet Screen

Providers: Rendering Administrator, Ensoft V Supervising d	octor, Immunologist 🗙 Referring: Ur	nassigned 🗸 Referring
Price Level: Standard	✓ Prior Authorization:	Unassigned 🗸



Encounter screen

atient 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 the 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.

Form(s)	Class Based Consent Form(s) Consent Form(s)				
Category	Form Name	Order	Enabled	Facilities	Edit
	FB Form Test 1	0	Yes		Ľ
	14-Day Treatment Plan	0	Yes	laitnediseR	Ľ
	24 Hour Incident Report	0	Yes	Mental Health	Ľ
	A&D and Mental Health Assessment	0	Yes	Mental Health	Ľ
	A&D and Mental Health Assessment	0 1	No		Ľ
	A&D Assessment	0 1	No		Ľ
	A&D Assessment	0 1	No		Ľ
	A&D Assessment Update.	0 1	No		Ľ
	A&D Assessment V1	0	Yes	laitnediseR	C
	A&D Assessment V2	0 1	No		50

dm Ba	Save	Cancel			•
	Form Name:	24 Hour Incident Report			
ne Test	Order:	0			Edit
eat	Portal Enable:				
ncid Mei Ssr Ssr Ssr Ssr	Facilities:	Available Facilities TSave Nature Clinic #123 Abc Hospitals KSR Super Specialty Hospital KYR multiple Super Specialty H laitnediseR Lee County Natural Vaidyalayam NIMS secivreS themtaerT sliarT kcorm theitapuO dnomdeR	>>	Selected Facilities Mental Health	



Change 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).

		REENING SCHEDULE CLIENTS PRACTICE BILLING REPORTS ADMINISTRATION INE	NX SETTINGS ADL UNPLUG: SERVER	
ns Settings	*			
		Not all fields are required for all codes or code types.		
rms Workflow		Type: Select Code Type V Code:	Modifier: Active	
actice		Description:	Modulo:	
icace				
ograms		Short Description:		
		Category: Unassigned V Diagnosis Report	ing Service Reporting	
rvices		Display On UBO4 (Box 44) Check here if the mapped code needs to go on UBO4 of	laim form	
	4	Ledger Account Number:		
aim Rules				
tegories				
lling Rules				
ning rules		Update Add as New		
ldr Book	ICD10 Procedure/Service			
	Crisis Non Billable Codes DD Billing Codes			1 - 17 of 17 🔉
lling Rules	CPT4 Procedure/Service	Search Diagnosis Reporting Only Service Reporting Only		
ttings	Du 0.	Short	Managed ICD	
	Code Modifier Active Dx Set	erv Type Description Short Description	Category Mapped ICD Standard OHP AD Cap OHP MH Cap Code	Actions
4	90791 Yes No No			
d magement +				[Delete] [Edit] Fee]
d + nagement +	90792 AF Yes No No	o CPT4 Psychiatric Diagnostic Eval MD	325.00	[Delete] [Edit] Fee]
nagement +	90792 AF Yes No No 90792 Yes No No	o CPT4 Psychiatric Diagnostic Eval MD o CPT4 Psychiatric Diagnostic Evaluation with Medical Services	325.00 326.00	[Delete] [Edit] Fee] [Delete] [Edit] Fee]
d + nagement + ing les(Debug)	90792 AF Yes No No 90792 Yes No No 90832 Yes No No	CPT4 Psychiatric Diagnostic Eval MD CPT4 Psychiatric Diagnostic Evaluation with Medical Services CPT4 Psychotherapy, 30 minutes with patient and(or) family	325.00 326.00 110.00	(Delete) [Edit] Fee) (Delete) [Edit] Fee) (Delete) [Edit] Fee)
nagement +	90792 AF Yes No No 90792 Yes No No	CPT4 Psychiatric Diagnostic Eval MD CPT4 Psychiatric Diagnostic Eval MD CPT4 Psychiatric Diagnostic Evaluation with Medical Services CPT4 Psychotherapy, 30 minutes with patient and(or) family CPT4 Psychotherapy, 45 minutes with patient and(or) family	325.00 326.00 110.00 154.00	[Delete] [Edit] Fee] [Delete] [Edit] Fee]

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

Standard Fee: 326			HP MH Cap: 0.00	
Effect From: 01/01	/2010	* То:		
	Update	Cancel		
Add				
Effect From Date T	o Date Standard Fe	e OHP AD Cap OHP MH	I Cap Modified By Modified On	
01/01/2010	326.00	0.00 0.00	Ensoftek Admin 03/10/2022 08:22:28 Edit Apply	



New 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**.

ccounting-addonly(Edit) ccounting-write(Edit) dmit Discharge-write(Edit) nalytical Reports Admin-write(Edit) uditor-readonly(Edit) linic Admin-write(Hide)	
Active	Inactive
Appointments (write optional) Delete Patient Incident Reports - Delete any Non-Clinical Incidents report Demographics (write, addonly optional) Documents (write, addonly optional) EMAR Version 2 Admit / Discharge Data Entry (write, addonly optional) Hide Organization Add button Patient Insurance Access Medical/History (write, addonly optional) Patient Notes (write, addonly optional) Patient Notes (write, addonly optional) Patient Access (write) Psychiatric Access (readonly) Admit / Discharge Reporting (write, addonly optional)	Accounting Manage Rate Master Accounting Period Management Closing/Re-opening Accounting Period Billing Error Reports Authorize - delete claims Disable Delete Payment Disable Feesheet Price Discounting EOB Data Entry Setting ERA processing options Financial columns at Clinical Reports Go to Feesheet GL Interface/Crosswalk GL Settings Hide access to Set Bill-To at Billing Manager



Reports

Total Clients Displayed in Collections/Aging Report

Core

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

Name	SSN	Phone	Follow Up Reason	Invoice	Svc Date	Charge	Adjust	Paid	Balance	May 22	Apr 22	Mar 22+	Prv	Sel
5Pro, Realme 5	XXX-XX-1111					5,040.00	-70.00	0.00	4,970.00	4,760.00	210.00	0.00		
Admit, ARC K						80.00	0.00	0.00	80.00	80.00	0.00	0.00		
Alle, Vaishali S	XXX-XX-3333					1,340.00	0.00	0.00	1,340.00	200.00	1,140.00	0.00		IC
Animals, Save A						610.00	-2.00	2.00	606.00	0.00	606.00	0.00		IC
Birds, Save A						710.00	0.00	0.00	710.00	0.00	710.00	0.00		
Climate, Save A						200.00	0.00	0.00	200.00	0.00	200.00	0.00		
Environment, Save A						400.00	0.00	450.00	-50.00	0.00	-50.00	0.00		
Fields, TestS		111-111-1111				480.00	0.00	0.00	480.00	80.00	400.00	0.00		
JanuS, JanuS K	XXX-XX-2323					320.00	0.00	0.00	320.00	320.00	0.00	0.00		
Kaka, Kaka						16.00	0.00	0.00	16.00	16.00	0.00	0.00		
Money, Save A						510.00	0.00	225.00	285.00	0.00	285.00	0.00		
Nature, Save A						200.00	0.00	0.00		0.00	200.00	0.00		
Nature, Save						200.00	0.00	0.00	200.00	0.00	200.00	0.00		
Planet, Save A						500.00	0.00	0.00	500.00	100.00	400.00	0.00		
Power ghjhj, Van, Nus, rock K						1,300.00	0.00	0.00	1,300.00	0.00	1,300.00	0.00		
Server, Unplugged		111-111-1111				210.00	0.00	0.00	210.00	210.00	0.00	0.00		
Test, Form						80.00	0.00	0.00	80.00	80.00	0.00	0.00		
Tom, Test						80.00	0.00	0.00	80.00	80.00	0.00	0.00		
Water, Save A		343-545-4354				35.00	0.00	0.00	35.00	0.00	35.00	0.00		
Total number of patients : 19				Report			12,311.00		677.00	11,562.00	5 926 00	5 636 00		

New Class-Based Report

Core

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.

Service 05/16/20	22		Service 05/18/20	Date To:		D	x Code:		Clear			Sear Prir CSV E	it	Offline Report	rts		
Manage C																	+
tal Numb	er of In	ndividual(s): 1															
D	TOP ID	Granted Psychosocial / PRN Consent	Age	Marital Status	Race	Ethnicity	Sex	Gender Identity	Sexual Orientation	Date DX	DX Code	Dx		Intake Date to Program		Sessions Attended	
002485	1231	Yes	2 year(s)	domestic partner	Hispanic	Japanese	Female		Straight or heterosexual	05/16/2022	ICD10:F10.20	(F1020)Alcohol dependence, uncomplicated		04/10/2022	N/A	0	1
002485	1231	Yes	2 year(s)	domestic partner	Hispanic	Japanese	Female		Straight or heterosexual	05/16/2022	ICD10:A75.0	Epidemic louse-borne typhus fever due to Rickettsia prowazekii	1Save Nature Clinic #123	04/10/2022	N/A	0	1



Administration

New Option to Search Logs using Comments

Core

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

User: ×reddy ×User,			End Date: Type of Ex		16:28:08 Update		
Individual: Fint						CSV Export	
Comments: %L						Offine Reports	
	0		December 5	Des Desert			
Add Report	sum: 🗆		Records F	Per Page:	500 *		
Add Report	sum: 🗆	UserID		Per Page:		Comments	IP Address
Add Report		UserID yella					IP Address 202.153.33.90
Include Checks Add Report 500 te 19/2022 10.36.01 19/2022 10.40.37	Event		User Name	PatientID	Success	Comments	

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

5	Still with us? Your security is important to us System will log you out in 28 s		idle for a while.	F
		Logout	Continue Working	