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DrCloudEHR™
February Release Notes

Release to Staging Site – January 29, 2023

Release to Production Site – February 05, 2023

Table of Contents

Overview

This document contains the Release Notes for February 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.

Patients

Option to Hide Staff Assessment Section in Group Therapy Note form

☑ **Core**   ⚙ **Setup**

DrCloudEHR customers can request DrCloudEHR Client Services to hide the **Staff Assessment** section within the **Group Therapy Note** form. When enabled, all the radio buttons in this section are hidden.

Save Credit Card data in a PCI-DSS Compliant manner

☑ **Core**   ⚙ **Setup**

Customers that use integrated OpenEdge Credit Card processing within DrCloudEHR can now save credit card numbers for later use. This data is saved in a PCI-DSS compliant manner. You can access the **Add New Credit Card** button on the File tab at Patient Demographics → Billing → Credit cards.

Note: Credit cards on file tab is visible only when OpenEdge is enabled at Practice → Administrative → Practice → Payment Gateways
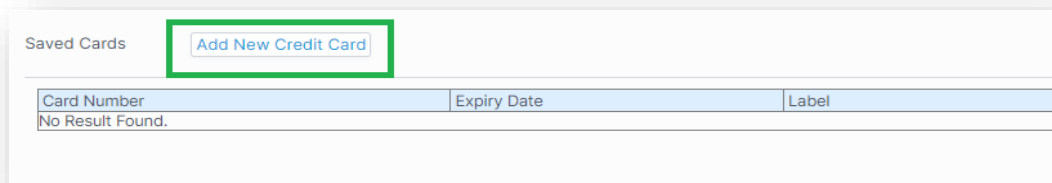
New Option to Restrict Users from being able to edit or delete Admit/Discharge records

☑ **Core**

A new ACL (Access Control List) is now available to restrict select users from editing Admit/Discharge records. For these select users, the **Edit** and **Delete** buttons will not be available against both admit and discharge records and the **Discharge** button will be hidden against admit records.

Note: All users are in the ACL by default so they can edit the records. Remove the ACL from a user's list if you would like to restrict them from being able to edit these records.

Practice

Option to include custom demographic fields in Golden Thread Rule Alerts

☑ **Core**   ⚙ **Setup**

Authorized users can configure golden thread alerts to include custom demographic field information. Simply choose the Patient Demographics field from the list when setting up a Golden Thread Rule.
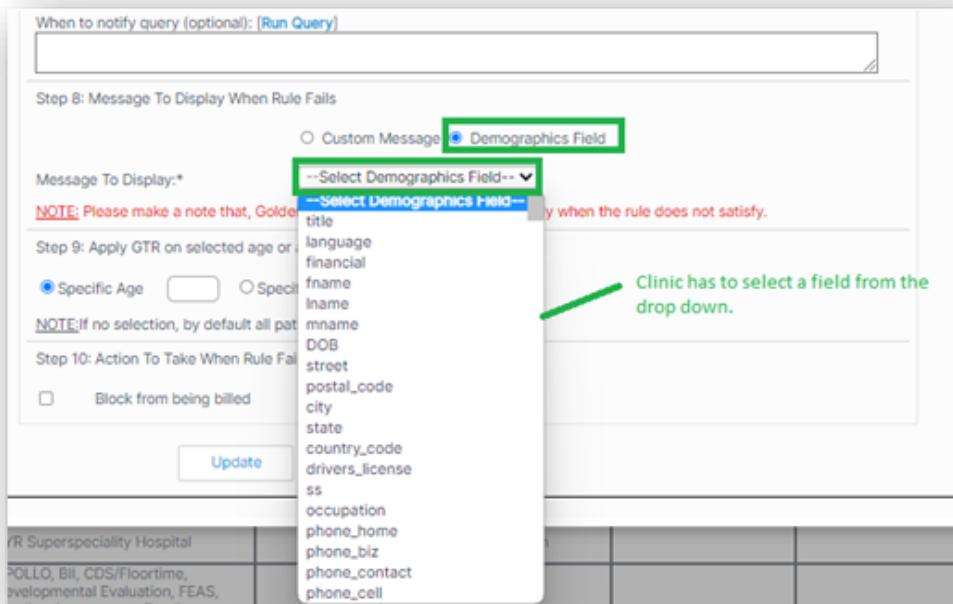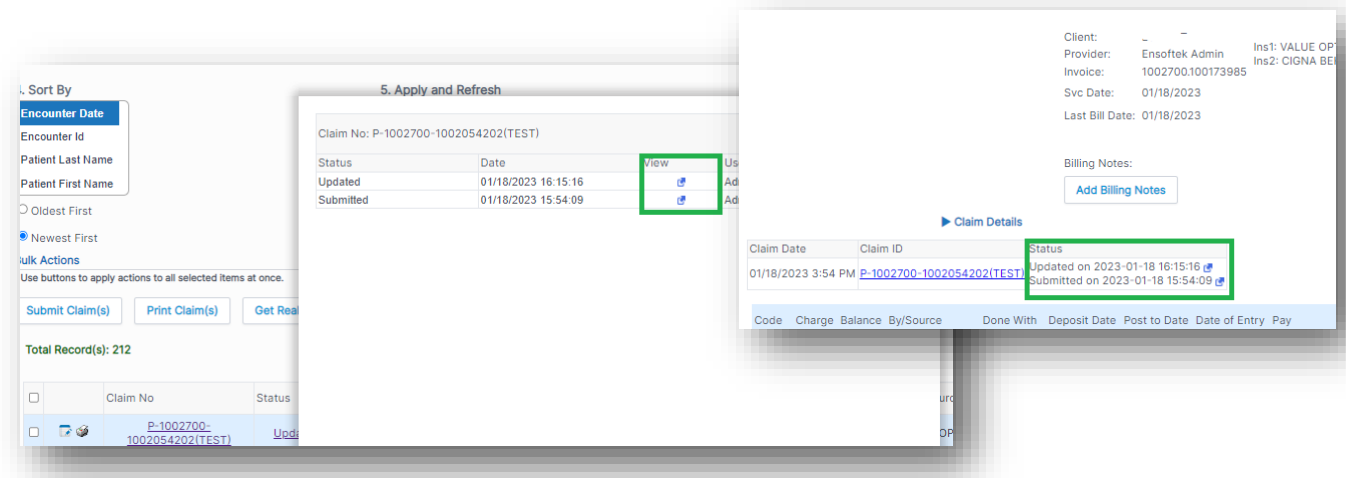
Billing

A new status column was added to Claims Manager

✅ **Core**

Now authorized billing users can view claim status history in the Claims Manager and Encounter Details.

Mark Encounter as 'Billed' from Feesheet and Batch Close Encounter

✅ **Core**

Authorized Billing Users can now mark encounters as Billed using the 'Mark as Cleared' button within both the **Feesheet** and **Batch Closing/Reopening Encounter** reports.

Option to rebill an encounter to the same payer or indicate next-level billing in the Payment Allocation Screen

☑ **Core**

Authorized users can now indicate next-level billing or indicate rebill for an encounter. Rebill will indicate that the encounter needs to be rebilled to the same payer (primary, secondary, or tertiary).

On the Invoice Manager page   *At the Payment Allocation screen*

New option to add NDC Code information to CPT4 codes

☑ **Core**

Authorized billing staff can now add NDC code information to the CPT4 codes, similar to HCPCS codes. The NDC information will appear in the HCFA claim form when the claim is generated or submitted.

Feesheet View   *HCFA Claim Form View*

Filter encounters based on Client First name or Last name in Billing Manager and Denials Manager

☑ **Core**

Authorized users can now filter encounter results using the **Patient's First Name** and/or **Patient's Last Name** in the Billing Manager and Denials Manager.

Note: An alphabet range can also be entered: K-Z

Filter claims using the 'Current Claim Status' filter in Claims Manager

☑ **Core**

Authorized staff can now search for claims using claim status filters in the Claims Manager.

List adjustment codes using description text in Adjustment Report

☑ **Core**

Authorized users can now search for specific adjustment codes in the **Adjustment Report** simply by entering the text they want to search by.
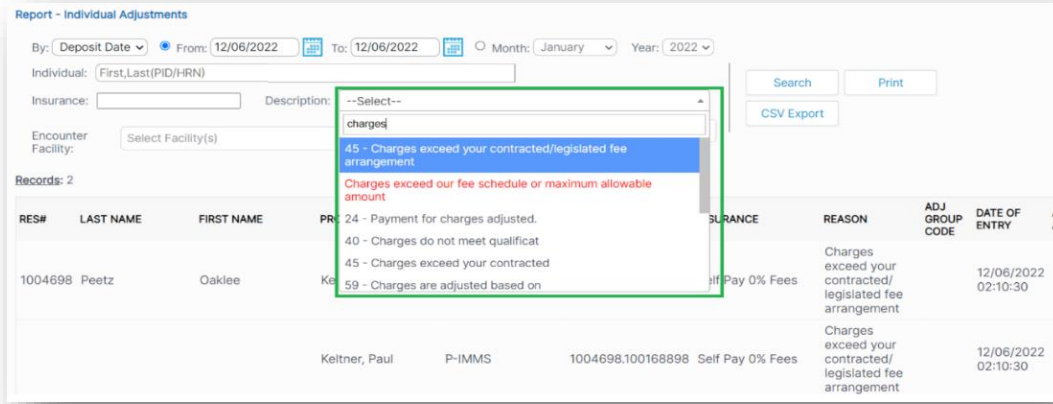
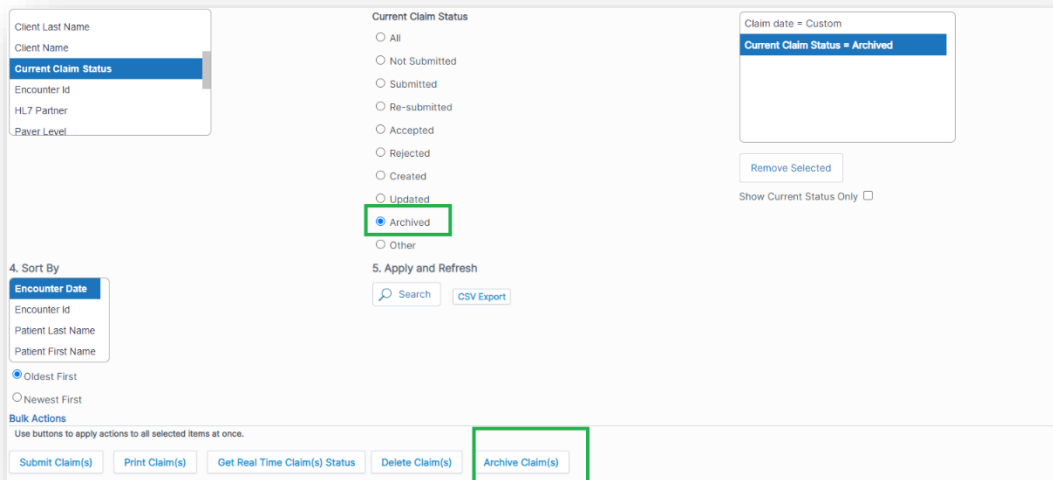
Added ability to manually update claim status to 'Archived'

☑ **Core**

Authorized users can now use the **Archive Claim(s)** option in the Claims Manager to archive claims. Claims will be marked with the new **Archived** status and will be excluded from search results.

Note: Only claims with Rejected Status can be archived.

Adding 'Post to Date' & 'Date of Entry' to the Invoice Page

☑ **Core**   ⚙ **Setup**

Customers can now request DrCloudEHR Client Services to enable displaying the **Post to Date and Date of Entry** fields on the EOB → Invoice.

Note: The Date field has been renamed to Deposit Date.

Patient Portal

Option to remove the Inbox tab in the Patient Portal

☑ **Core**   ⚙ **Setup**   💲 **Add-on**

Customers can now request DrCloudEHR Client Services to turn the Inbox tab off in the Patient Portal.

Reports

Clearing 'Amounts Due' and 'Billed to Primary' statuses when secondary billing is not needed.

☑ **Core**

The **Billed To** column in the Provider Service Report was implemented. When claims are submitted by primary, secondary, or tertiary insurance, the appropriate columns are displayed. We are showing the Billed To column status as **Empty** when Encounters are marked as clear and unbilled.