



**ensoftek**<sup>®</sup>

DrCloudEHR<sup>™</sup>  
June Release Notes

Release to Staging Site – May 28, 2023

Release to Production Site – June 4, 2023

# Table of Contents

- Practice** ..... 4
  - Ability to configure options to display/not display After visit Summary and Check-out Date..... 4
  - The Encounter Summary view loads much faster now ..... 4
  - A new Comment field is available when adding a New Patient ..... 4
  - New Service Rules Module to assign actions to take before providing services ..... 5
  - Changes to the Manage User Access screen ..... 6
- Billing** ..... 7
  - Additional default search criteria option at Claims Manager ..... 7
- Reports** ..... 8
  - Ability to view clients created in a given period ..... 8
- Third-party Modules** ..... 9
  - New Greenspace Outcomes Measurement Module available ..... 9
- Incident Report Module** ..... 10
  - Now users can report Incidents Anonymously ..... 10

## Overview

This document contains the Release Notes for June 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](mailto:support@drcloudemr.com).

## Practice

*Ability to configure options to display/not display After visit Summary and Check-out Date*

Core Setup

DrCloudEHR now provides the option to display/not display the **"After Visit Summary"** and **"Check-Out Date"** on the New Encounter Form based on the global settings - "Hide After Visit Summary Section at new encounter" and "Hide the Check-Out Date field at new encounter". Please contact DrCloudEHR Client Services to update your agency's configuration.

*The Encounter Summary view loads much faster now*

Core Setup

DrCloudEHR now displays the forms in an encounter in a list by default in the Encounter Summary view to load the Encounter Summary quickly. Click the new **"Preview"** button to view the form. Please contact DrCloudEHR Client Services to have this setting updated for your agency if needed.

The screenshot shows a 'Documents' section with an 'Upload Document' area and a table of 'Documents attached to this encounter'. Below this is a list of forms:

- Client Encounter** by Good User (0%) with buttons: Preview, Edit Form, Print
- 24 Hour Incident Report** by Good User (0%) with buttons: Preview (highlighted with a green box), Edit, Delete, Print, Log Treatment Time, Supervisor Approval, Addendum
- Assessment and Intake Note V3** by Good User (33.33%) with buttons: Preview, Edit, Delete, Print, Log Treatment Time, Supervisor Approval, Addendum

*A new Comment field is available when adding a New Patient*

Core Setup

DrCloudEHR now includes a **"Comment field"** in the admit section when adding a New Patient. Comments will be saved and displayed on Admit/Discharge page in the comments field in the admin section.

The screenshot shows the 'Individual Admission' form with the following fields:

- Individual Admission
- Admit Date: 04/26/2023 08:41:16
- Program: -- Select --
- Provider: -- Unassigned --
- Comments:** Admitted on 26th April (highlighted with a green box)
- Add Individual:  To the selected group sessions  No With Effective From: 04/26/2023
- Buttons: Search, Create

## New Service Rules Module to assign actions to take before providing services

Core Setup

DrCloudEHR now includes the option to create specific "Service Rules" in the Service Rules Module at Practice → Administrative.

Users can define a rule for each code with specific criteria including insurance, facility, units allowed, number of occurrences, etc. These rules are then applied when creating an appointment, encounter, adding a code (encounter, fee sheet, forms), and billing. E.g., preventing a 3<sup>rd</sup> appointment/session from occurring on the same day of service.

## Changes to the Manage User Access screen

Core Setup

DrCloudEHR now includes the following changes in **Practice** → **Administrative** → **Programs**

- A. **"Users Dropdown"**: Now displays the provider certification levels next to their names.
- B. Added a check box **"Include Inactive Users"** to filter inactive users. This is unchecked by default. Now authorized users can easily manage access for active users. They can manage access for inactive users by checking the box to display them.

**Manage User Access**

**Include Inactive users**

Staff with access to this facility :

Staff with access to Admit History at this facility :

Staff providing services here :

5 of 85 selected

|

[Select all]

1Physician, 1Bright - Masters

Admin, Ensoftek - LCSW

Alle, Vaishali

cturist, Acupun

Dhamodhar, Maddana

doctor, Andrologist

doctor, Dermatologist

doctor, Endocrinologist

doctor, Epidemiologist

doctor, Gastroenterologist

doctor, Hepatologist

doctor. Homeopathic

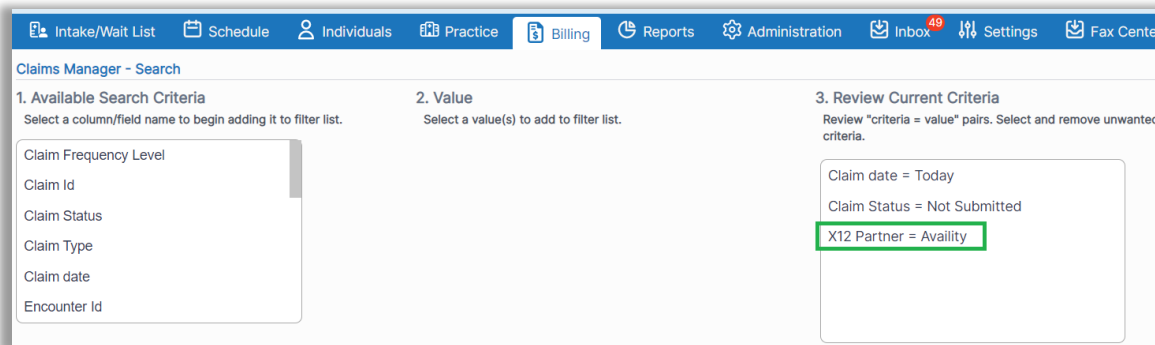
Last update by Admin, Ensoftek on 05/08/2023 04:16:08

# Billing

## *Additional default search criteria option at Claims Manager*

Core  Setup

DrCloudEHR now includes a new setting "Default X12 Partner" with the options - All, Select, and X12 Partners list. The selected option will then be added to the default search criteria in the Claims Manager. When nothing is selected then, there is no change to the current system behavior.



# Reports

*Ability to view clients created in a given period*

Core

## Reports → Clients → Clients List

DrCloudEHR now includes a new radio button "Client Creation" at Reports → Clients → Clients List. Using this option and selecting the required date range authorized users can list the patients that were created during that timeframe.

**Report - Client List Creation**

From Date:  To Date:  Option:  Gender:

Client:

Age Range: From  To

Admit Facility:

Search by:

All Clients 
  Active Individual 
  Individual Arrived 
  Individual Discharged 
  Individual Creation

Total Number of Clients: 79

Client Created On	Client Name	PID	External ID	Age	Gender	Race	Ethnicity
04/03/2023 10:19 PM	Debi, Alec	1002816	1002816	12	Male		
04/03/2023 11:01 PM	Gilly, Abbott	1002817	1002817	12	Male		
04/04/2023 12:03 AM	Rey, Bank	1002818	1002818	14	Female		
04/04/2023 2:02 AM	Joby, Base	1002819	1002819	19	Female		
04/04/2023 2:49 AM	Jonie, Bail	1002820	1002820	15	Male		

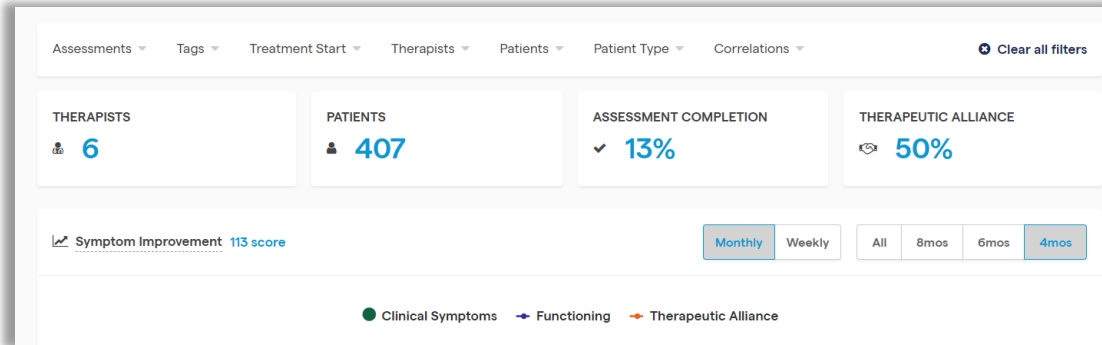


# Third-party Modules

*New Greenspace Outcomes Measurement Module available*

Core    Setup    Add-on

DrCloudEHR now supports integration with Greenspace Mental Health’s Measurement-based Care. Measurement-Based Care involves tracking client progress throughout treatment, using consistent Patient-Reported Outcome Measures (PROMS). Please contact DrCloudEHR Client Services or your Customer Success Manager to purchase this module.



*Greenspace - Sample Dashboard*

# Incident Report Module

Now users can report Incidents Anonymously

Core Setup

DrCloudEHR now supports anonymous Incident reporting. Authorized users can create an anonymous user by assigning the **"Anonymous login Group"** in User Administration. These users will only have access to the Patient Incidents screen to submit a clinical or non-clinical incident. They cannot view/edit/print an incident once it is submitted.

