



DrCloudEHR™ March Release Notes

Release to Staging Site – February 26, 2023

Release to Production Site – March 05, 2023

Table of Contents

- Patients** 4
 - Added Short Name to the facility drop-down list in the admit /pause/ discharge screen..... 4
 - Immunization Registry - RXA-9 Field now updated to include an indicator for a new or historical immunization record..... 4
- Practice** 5
 - ERA Processing Options – Adjustment reasons for information only 5
 - Updates to Service Facility NPI in CMS 1500 (Box 32) 5
- Billing** 6
 - Ability to indicate when to bill remaining balance to next level payer at payment allocation screen 6
 - Option to include NDC code related to CPT4 codes in the Fee Sheet 7
 - Write-offs are now an Adjustment 8
- Counselor Dashboard** 9
 - New Column Tentative Discharge Date added to Counselor Dashboard 9

Overview

This document contains the Release Notes for March 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.

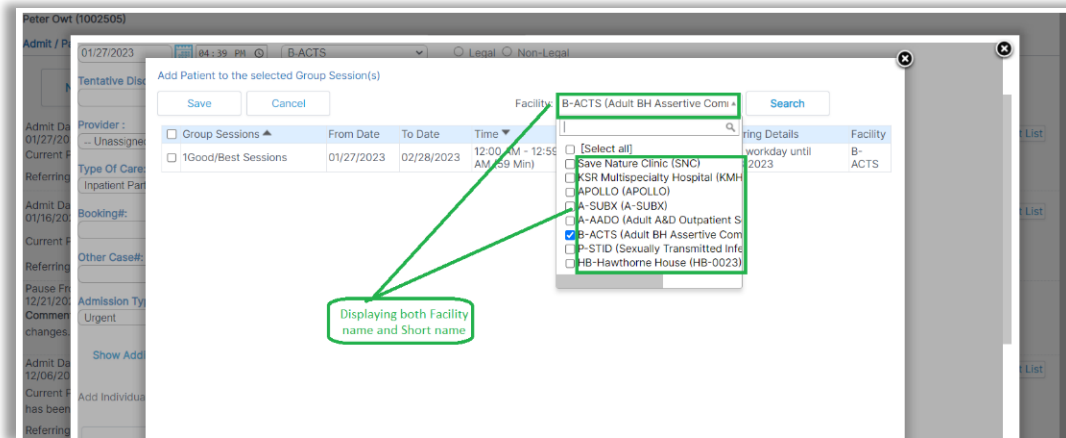
If you have any questions regarding Staging Sites or this Release, please don't hesitate to contact our support team at support@drcloudemr.com.

Patients

Added Short Name to the facility drop-down list in the admit /pause/ discharge screen

Core

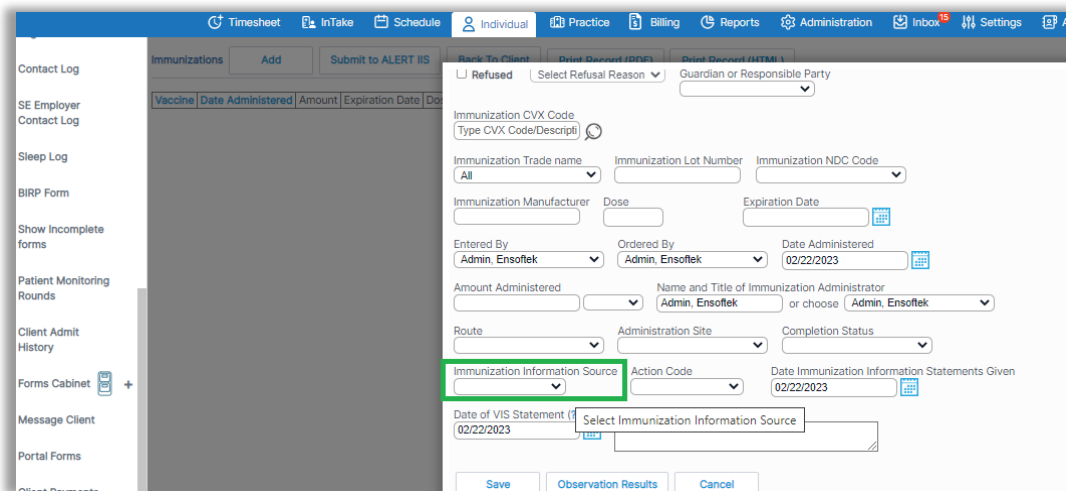
Now users can pick the appropriate facility from the list of facilities when adding clients to group sessions using the facility's **"Short Name"**.



Immunization Registry - RXA-9 Field now updated to include an indicator for a new or historical immunization record

Core

DrCloudEHR includes an indicator for a new or historical immunization in the RXA-9 field in the data that is submitted to immunization registries such as ALERT IIS in Oregon. This value is populated from the **"Immunization Information Source"** field when adding or updating an Immunization record.

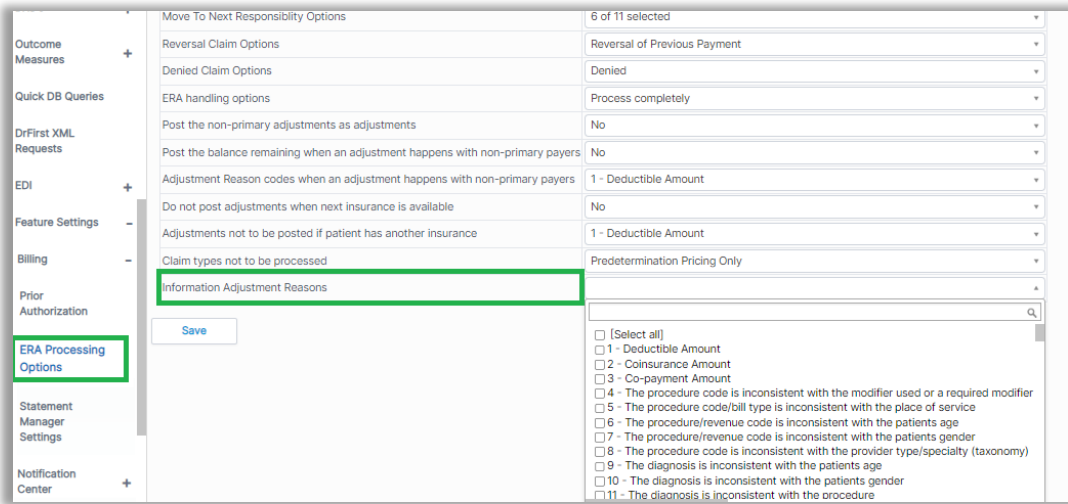


Practice

ERA Processing Options – Adjustment reasons for information only

Core

Sometimes adjustments in ERA are neither denial nor an actual adjustment but just information only, to support this use case, there is now a new option available to pick in the ERA settings under "**Information Adjustment Reasons**". Authorized users can configure one or more codes to be marked as information adjustment reasons. When an ERA process includes these reasons, DrCloudEHR will post a line in the ERA report and a line on the invoice page.

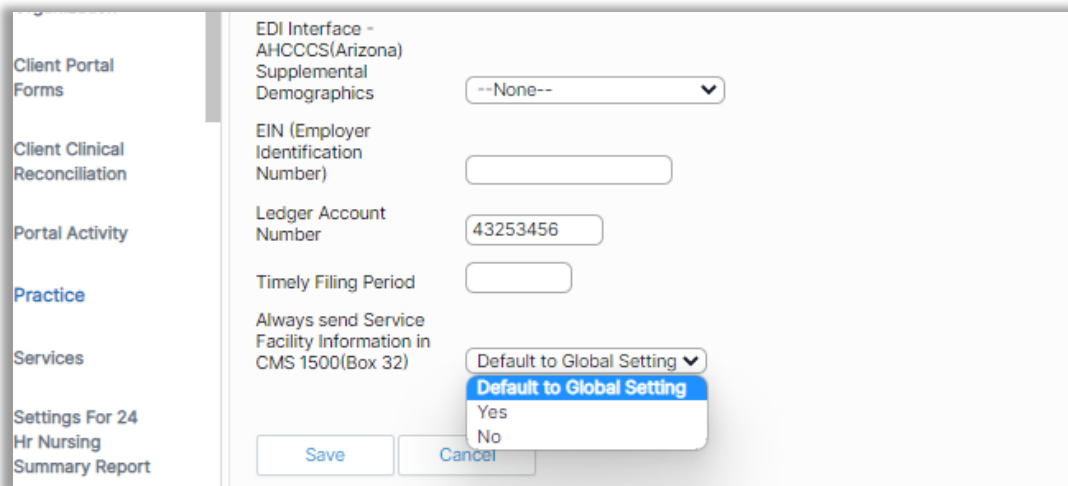


Updates to Service Facility NPI in CMS 1500 (Box 32)

Core Setup

When the NPIs of the Service facility and Billing facility is the same, some payers reject those claims. To avoid this rejection DrCloudEHR includes a configurable option in the payor/insurance record.

Authorized users can override the global setting to always include "**Service Facility Information**" in the claim.



Billing

Ability to indicate when to bill remaining balance to next level payer at payment allocation screen



When the payment/adjustment from the Primary Insurance is received and no more payments are expected from the Primary Insurance, then Authorized users can now mark the claim as **"Done with Ins1"**. The same applies to secondary and tertiary insurance.

Rebill - When the payment/adjustment from the primary insurance is received and if the client is expecting more/a different response, then the claim can be marked to rebill and available to generate and submit claims. The same rule applies to secondary and tertiary insurance.

NOTE: Needs "Next Level billing" is now renamed to **"Rebill"**.

On the Invoice Manager Page

Client: Ensoftek Admin Inst: VALUE OPTIONS
 Invoice: 1002723.100174030
 Svc Date: 01/19/2023
 Last Bill Date: //ed/Not

Statements Sent: 0
 Check/EOB No.:
 Check/EOB Date:
 Deposit Date: 01/20/2023

Buttons: Save, Cancel

Billing Notes:
 Add Billing Notes

Code	Charge	Balance	By/Source	Done With	Deposit Date	Post to Date	Date of Entry	Pay	Adjust	ResoN	Adj Group Code	Rebill	Follow-up Rea
H0004	195.00		Insurance 1	None								<input type="checkbox"/>	
H0004-HA	100.00		Insurance 1	None								<input type="checkbox"/>	

At the Payment Allocation Screen

New Payment Close

Batch Payment Entry

Date: 01/20/2023 Post To Date: 01/20/2023 Payment Method: Check Payment Check/Ref Number: 123
 Payment Amount: 100.00 Paying Entity: Funding Source Payment Category: Funding Source Payment
 Payment From: VALUE OPTIONS [10039] Payment Received by: Admin, Ensoftek
 Deposit Date: 01/20/2023 Description: VALUE OPTIONS UNDISTRIBUTED

Buttons: Post Payments, Cancel

Client: 1002723 Paid Non Show Primary Complete Show All Transactions Services: Billable Services Done With: Select an option Rebill:

Post For	Service Date	Enc Facility	Encounter	Rendering Provider	Service Code	Charge	Copay	Balance	Allowed	Payment	Capitation	Risk W/hold	Adj Amount	Adj Reason	Adj Group Code	Deductible	Recoupment	Done With	Rebill
Ins1: VALUE OPTIONS	01/19/2023	YB	100174030	Admin, Ensoftek	H0004	195.00	0.00	195										None	<input type="checkbox"/>
Ins1: VALUE OPTIONS	01/19/2023	YB	100174030	Admin, Ensoftek	H0004-HA	100.00	0.00	100										None	<input type="checkbox"/>

Option to include NDC code related to CPT4 codes in the Fee Sheet

Core Setup

Authorized users can now include National Drug Code (NDC) information related to CPT4 codes in the Fee Sheet.

Fee Sheet

Source	Type	Code	Modifiers	Unit Price	Adj Amt	Adj Type	Reason	Adj Group Code	Units	Justify	Provider	Note
	CPT4	90834	NDC: 45678-9876-34 Qty: 2 (ML)	180		Patient			1	Z631	Admin, Ensoftek	
	HCPCS	H0004	NDC: 12345-6789-09 Qty: 3 (Grams)	65		Patient			1	Z631	Admin, Ensoftek	
	HCPCS	H0004	HA NDC: 23456-7890-01 Qty: 4 (Milligrams)	50		Patient			1	Z631	Admin, Ensoftek	
ICD10	Z63.1										Admin, Ensoftek	

HCFA Claim Form

19. ADDITIONAL CLAIM INFORMATION (Designated by NUCC)										20. OUTSIDE LAB? <input type="radio"/> YES <input checked="" type="radio"/> NO		CHARGES																					
21. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. (Relate A-L to service line below (24E))										22. RESUBMISSION CODE		ORIGINAL REF. NO.																					
24. A. DATE(S) OF SERVICE										B. Place Of Service		C. EMG		D. PROCEDURES, SERVICES, OR SUPPLIES		E. MODIFIER		F. DIAGNOSIS POINTER		G. \$ CHARGES		H. Days Or Units		I. EPSDT Family Plan		J. ID QUAL		K. RENDERING PROVIDER #					
NDC Qual: N4 NDC Code: 12345678909 NDC Qty: 3 NDC Meas: GR										2023-01-20		2023-01-20		03		N		H0004		A		85.00		1				ZZ		207Q00000X			
NDC Qual: N4 NDC Code: 23456789001 NDC Qty: 4 NDC Meas: ME										2023-01-20		2023-01-20		03		N		H0004		HA		A		50.00		1				ZZ		207Q00000X	
NDC Qual: N4 NDC Code: 45678987634 NDC Qty: 2 NDC Meas: ML										2023-01-20		2023-01-20		03		N		90834		A		180.00		1				ZZ		207Q00000X			
25. FEDERAL TAX I.D. NUMBER										SSN		EIN		26. PATIENT'S ACCOUNT NO.				27. ACCEPT ASSIGNMENT?		28. TOTAL CHARGE		29. AMOUNT PAID		30. Rsvd for NUCC									
54345436665														P-1002723-1002056202(TEST)				YES <input checked="" type="radio"/> NO <input type="radio"/>		\$ 295.00		\$ 0.00											
Date Of Initial Treatment:										2023-01-20				32. SERVICE FACILITY LOCATION AND INFORMATION				33. BILLING PROVIDER INFO. & PHONE #															
Date Last Seen:										2023-01-20				Program Name: CDI				Billing Provider: PP YELLOW BRICKS															
Supervising Physician:														Address: 7260 OWENSMOUTH AVE				Address: 123, DOWN STREET															
Supervising Physician NPI:														City: CANOGA PARK				City: PORTLAND															
Supervising Physician ID:														State: CA				State: CA															
Ordering Physician:														Zip: 91303				Zip: 32111															
Ordering Physician NPI:														Pay-To Address: 132, DOWN STREET				Billing Contact Name: DAVID															
														City: PORTLAND				Telephone: 4434355367															
														State: OR				Specialty/Taxonomy: 4343545467															

Write-offs are now an Adjustment



Users can now perform write-offs using the "Adjustment" payment method in the payment screen.

Payments / Refunds

SEARCH PAYMENT ERA POSTING New Payment

Payment List

Date Of Entry From: 02/01/2023 To:

Payment Method: Adjustment Check/Ref Number:

Payment Amount: Payer: Payment Category: Pay Status:

Payment From: Payment ID: Facility: Select Program(s)

Sort Result by: Payment Received by: ---- Select -----

Search Print CSV Export

ID	Date Of Entry	Paying Entity	Payer	Facility	Ins Code	Payment Method	Check/Ref Number	Pay Status	Payment	Undistributed	Check Status	Refund Status	Payment Received By
7161826669223813387	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		
7161824915015146505	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		Admin, Ensoftek
7161824915015146498	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		Admin, Ensoftek
7161824915015146499	02/14/2023	Client	Guard Power	SNC		Adjustment		Applied	0.00	0.00	Receipt		Admin, Ensoftek

Counselor Dashboard

New Column Tentative Discharge Date added to Counselor Dashboard

Core

Added the **"Tentative Discharge date"** column that can be hidden or shown through manage columns.

Counselor Dashboard Clinician: chandana g Include inactive users Refresh Export to Excel

Dashboard with overall status of all Individual where the counselor is the admit provider or a member of the care team

Show Client(s): Admitted Discharged Due Date by: (--Select--) Show only details which are incomplete.

Manage Column(s)

Provider	Program Type	Last Name	First Name	PID	Admitted Date	Tentative Discharge Date	Discharged Date	Physician Note	24 Hour Incident Report	Multidisciplinary Treatment Plan (MDTP)
g chandana (P)	KSR Multispecialty Hospital	szkrrxpT	afrtaiQ	1002099	01/07/2021	02/02/2023	Not yet			14/02/2023 14/02/2023 21/02/2023
g chandana (P)	APOLLO	szkrrxpT	afrtaiQ	1002099	30/06/2022	Not yet	Not yet	02/07/2022		14/02/2023 14/02/2023 21/02/2023