DrCloudEHR™
October Release Notes

Release to Staging Site – September 25, 2022

Release to Production Site – October 02, 2022

Table of Contents

Overview

This document contains the Release Notes for September 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	Add-on
Available to all users when released	Dependent on the activation of other feature(s)
Setup	Add-on
Some setup is required after release	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.*

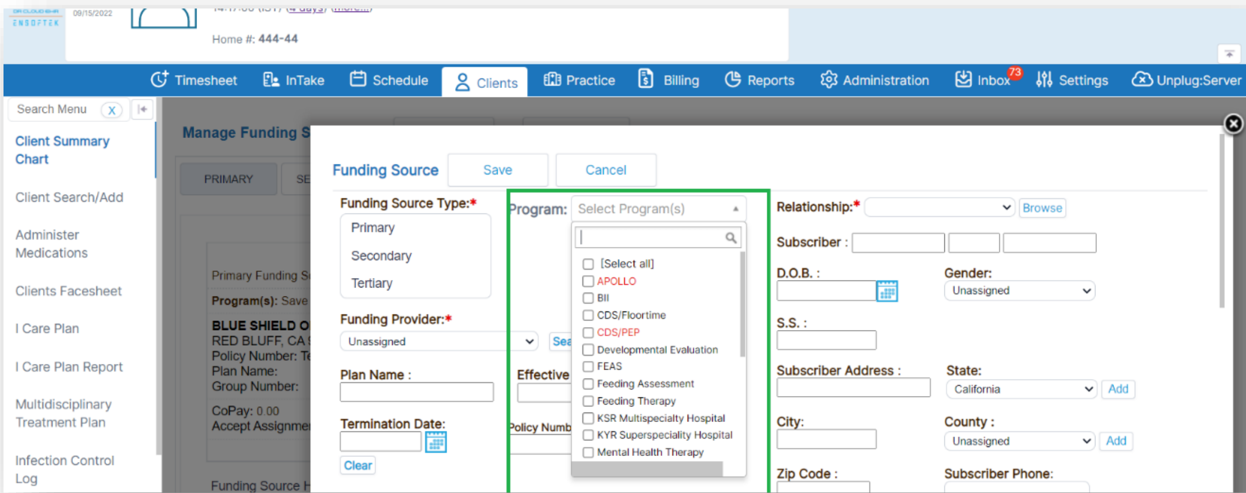
If you have any questions regarding Staging Sites or this Release, don't hesitate to contact our support team at support@drcloudemr.com.

Insurance

Inactive Programs Now Available in Insurance Selection

☑ **Core**

Authorized users now have the option to select inactive facilities in the **Facility** dropdown when adding new or updating existing insurance information. A list of facilities is displayed with a checkbox so users can select the appropriate facility.

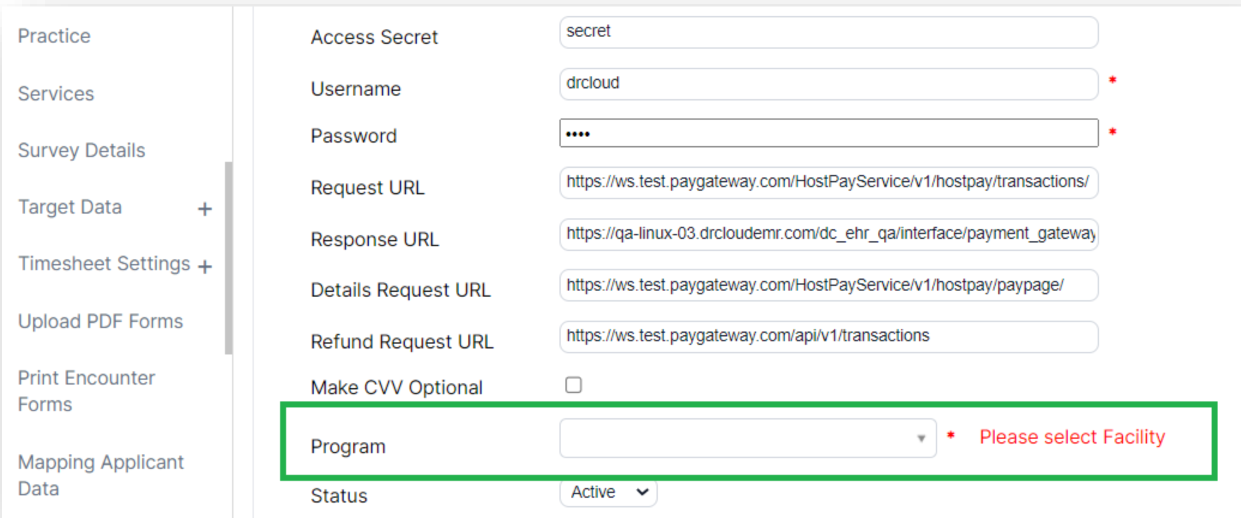


Practice

OpenEdge Credit Card Payment Processing – Multiple Account Support

Core **Setup**

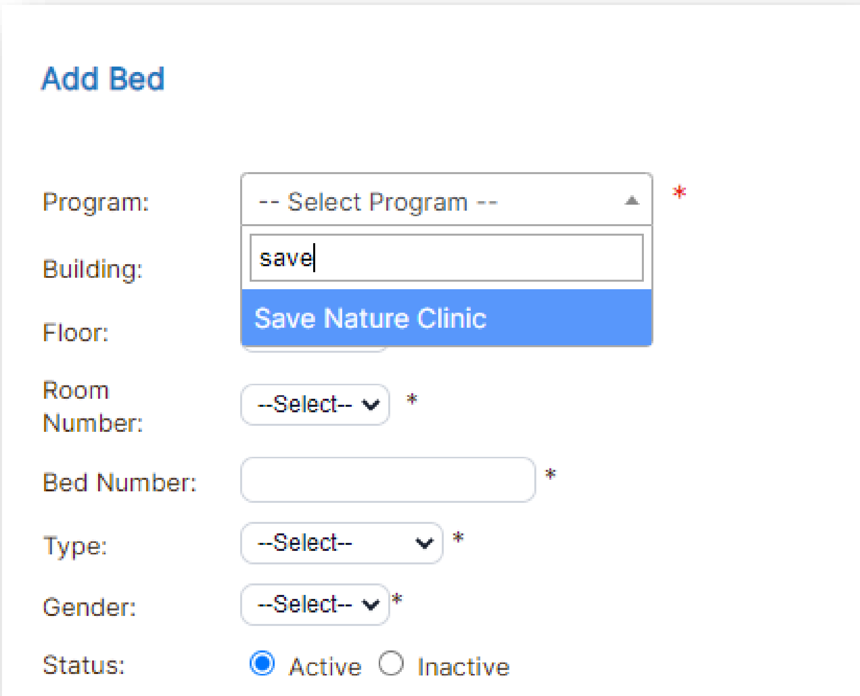
While most agencies have a single account with the payment gateway, some agencies have different accounts based on program/facility/location. This update enables DrCloudEHR customers to configure a facility/program with a credit card processing account of their choosing. Note, Agencies need to work with OpenEdge to set up the appropriate accounts first.



Bed Management Improvements to Search

Core

Now authorized users can search for the facility/program in the **Facility** dropdown when adding a Bed record in **Bed Management**. This is especially useful when an agency has a large number of programs/locations.

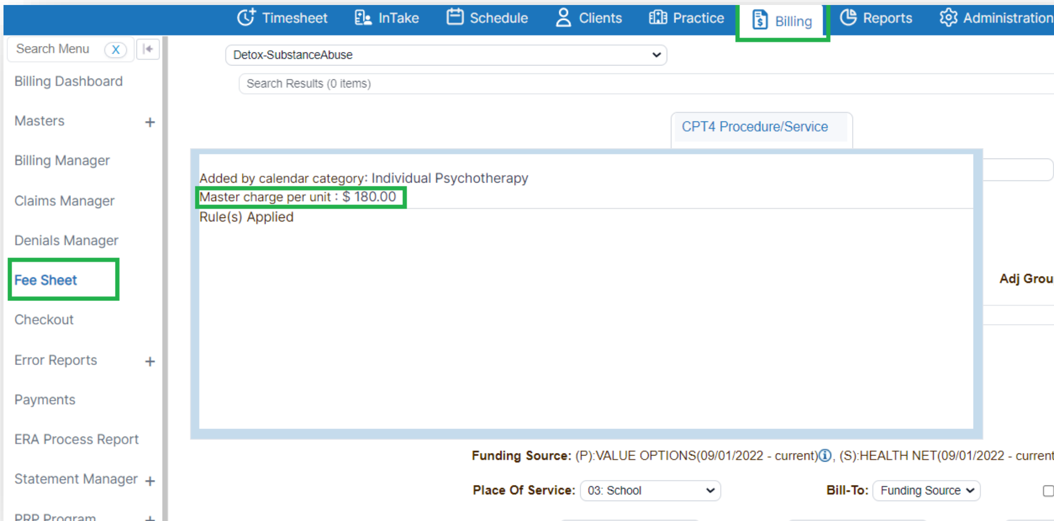


Billing

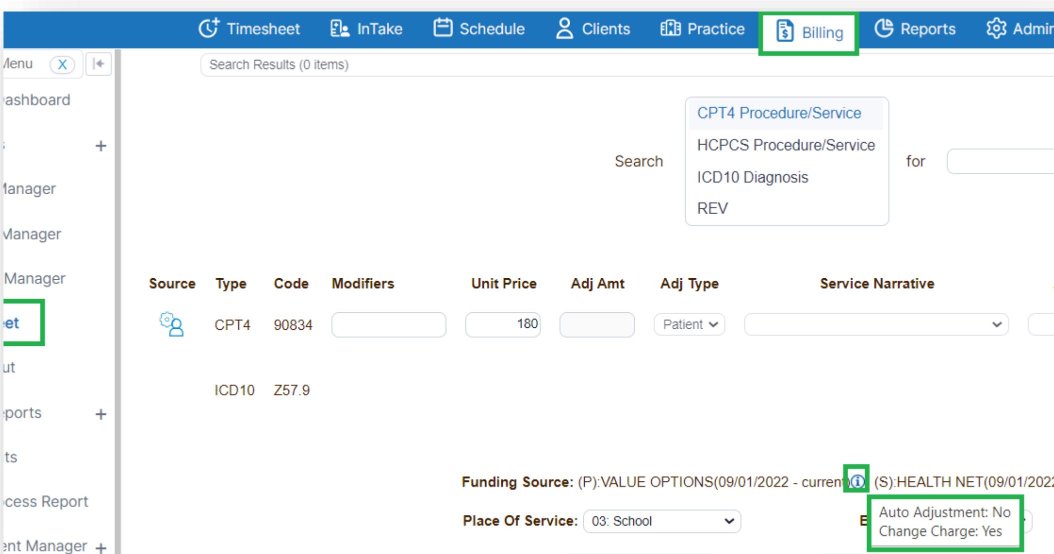
Fee Sheet Improvements

Core Setup

Billing Rule Preview now shows the **Master Charge** from services as static text so users can see whether charge in **Fee Sheet** is different than the charge from **Master Services List**.



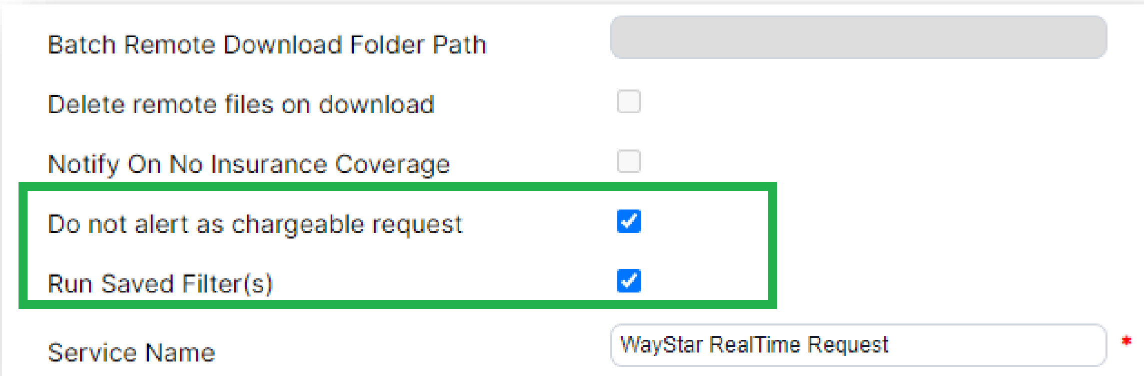
For DrCloudEHR agencies that use the **Contract Manager**, a new visual indicator next to the **Payer Name** in the **Fee Sheet** shows whether the option is set in the payer record to adjust the charge to match the contracted rate or not.



Real-time Eligibility and Benefits – Run Checks Using Saved Filters

Core **Setup**

There are two new options in order to make it easier when performing real-time eligibility and benefits checks. Authorized users can find these settings by navigating to Practice -> Administrative -> Practice -> X12 Partner Services.

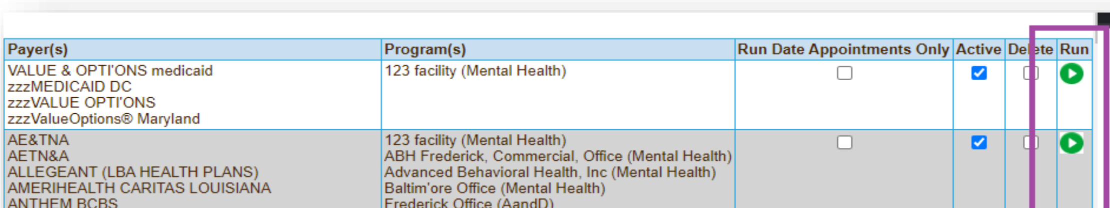


Do not notify on chargeable request

- Users now have the option to disable the annoying alert received from the system for a chargeable eligibility request.

Run saved Filter(s)

- When enabled, authorized users will have the option to run eligibility checks using a saved filter. They can click the green play button icon next to their desired filter on the Saved Filters screen.

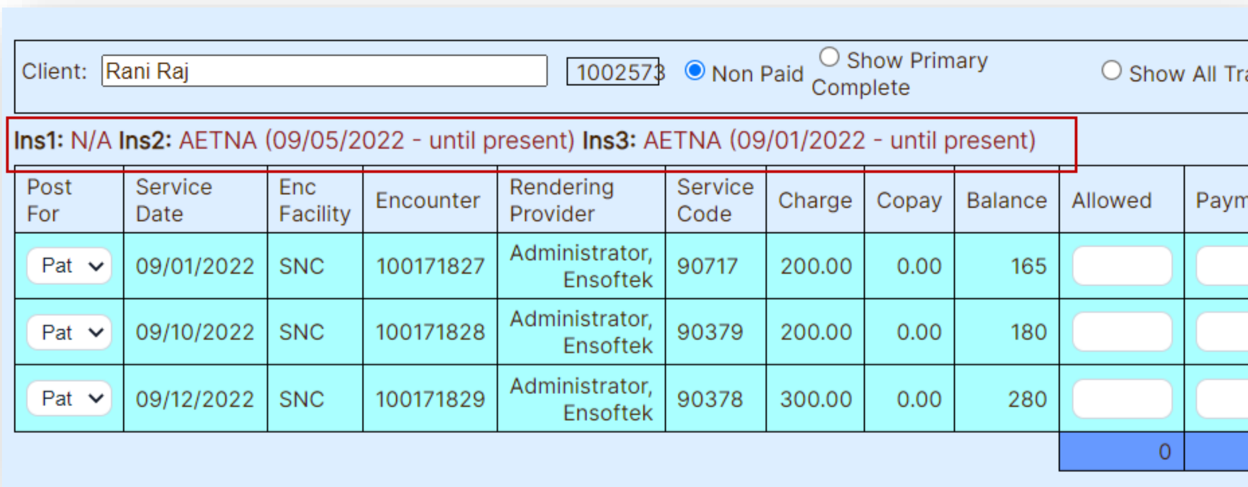


Payer(s)	Program(s)	Run Date Appointments Only	Active	Delete	Run
VALUE & OPTI'ONS medicaid zzzMEDICAID DC zzzVALUE OPTI'ONS zzzValueOptions® Maryland	123 facility (Mental Health)	☐	☑	☐	
AE&TNA AETN&A ALLEGEANT (LBA HEALTH PLANS) AMERIHEALTH CARITAS LOUISIANA ANTHEM BCBS	123 facility (Mental Health) ABH Frederick, Commercial, Office (Mental Health) Advanced Behavioral Health, Inc (Mental Health) Baltim'ore Office (Mental Health) Frederick Office (AandD)	☐	☑	☐	

Payment Allocation - Payer Name Added to Payment Allocation Screen

☑ Core

Authorized billing users are now able to see the insurances/payers which are active on the date of payment at the **Payment Allocation** screen.



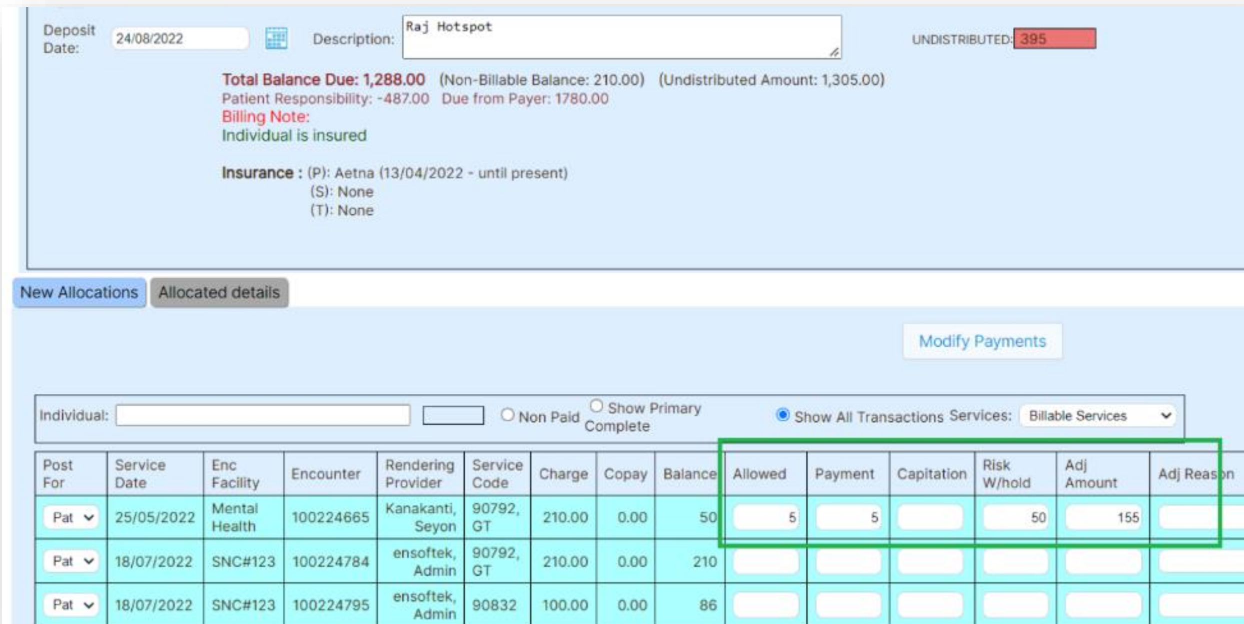
New Column Added in Payment Allocation - Risk Withhold Amounts

☑ Core

The column **Risk W/Hold** has been added on the **Payment Allocations** screen. Authorized users have the option to enter a desired value in this field, when entered this value is used calculate the **Adjustment Amount** as follows:

Adjustment Amount = Charge - Payment - Risk W/hold

The **Net Revenue Report** has also been updated to display **Risk W/Hold** value entered during payment allocation.

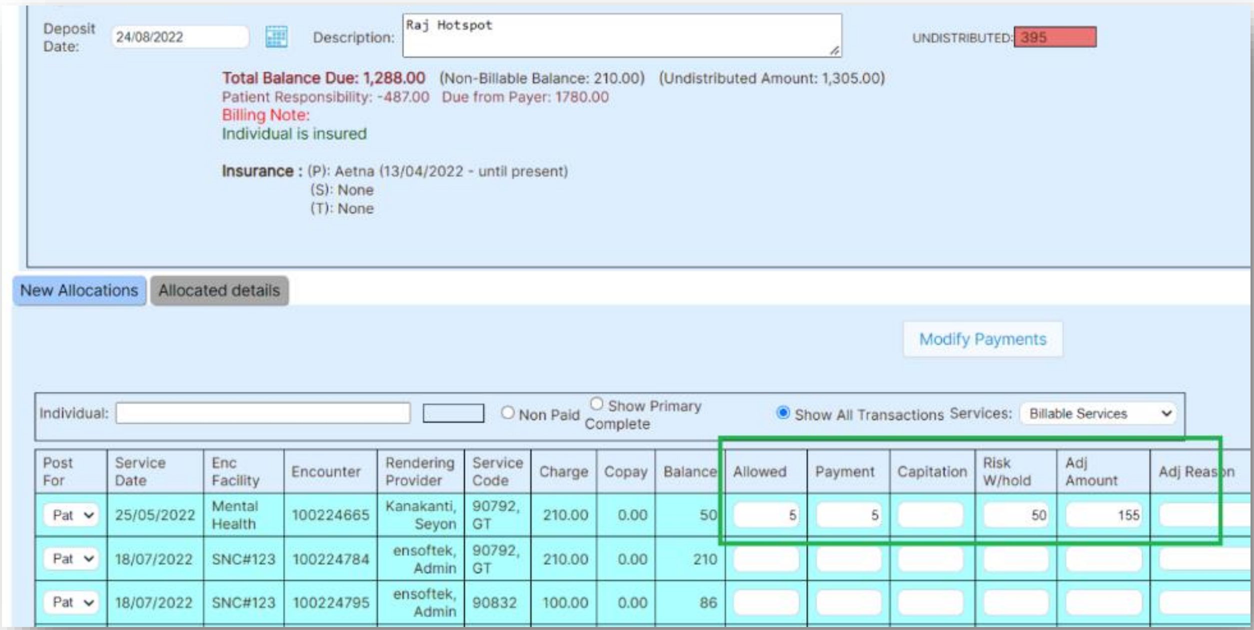


Reports

New Column Added in Net Revenue Report - Risk W/Hold Amount

☑ Core

The **Net Revenue Report** is updated to display **Risk W/Hold** value entered during payment allocation.

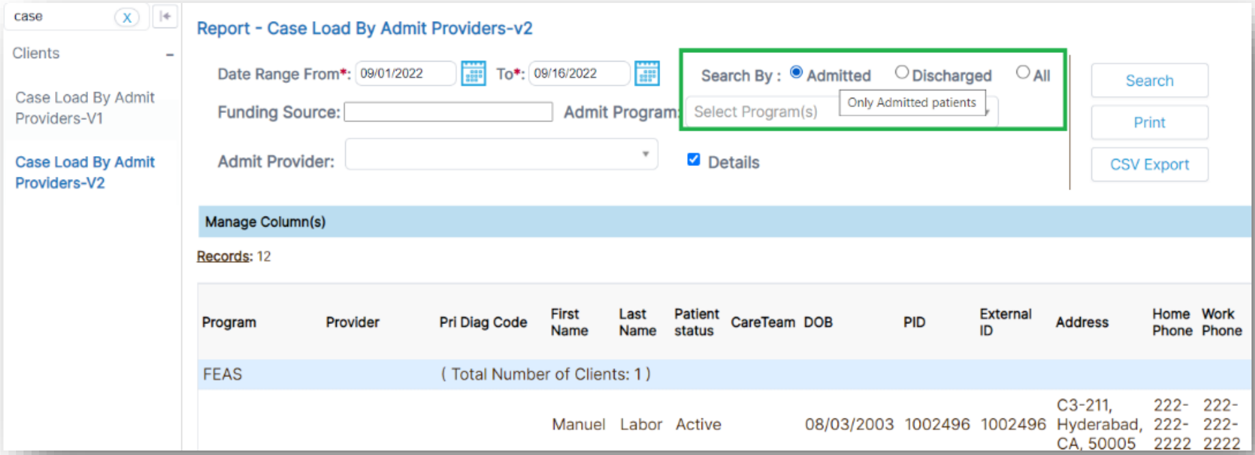


Case Load by Admit Providers (v2) – New Filter added

Core

Authorized users can now search/filter the results in the **Case Load** report by:

- **Admitted** – Only Admitted patients
- **Discharged** – Only Discharged patients
- **All** – Both Admitted and Discharged patients

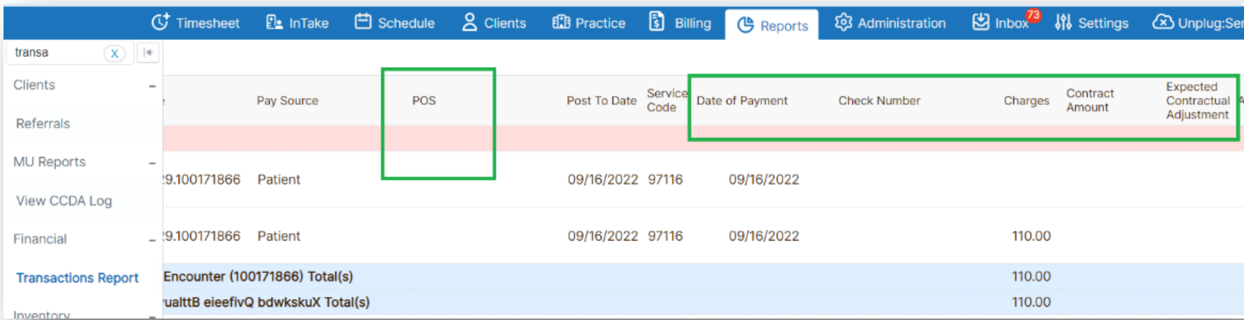


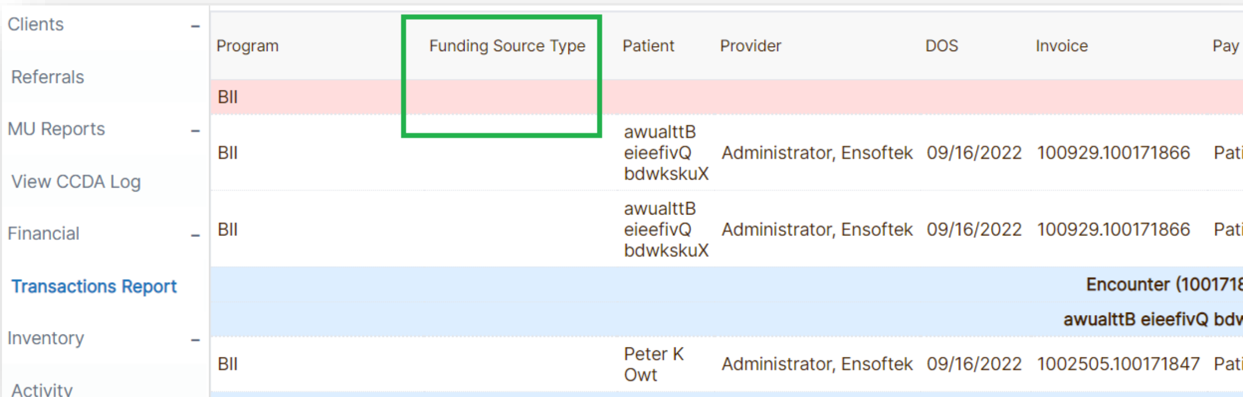
Transactions Report – New Columns and Filters Added

☑ **Core**

The following columns are now available in the **Transactions Report**:

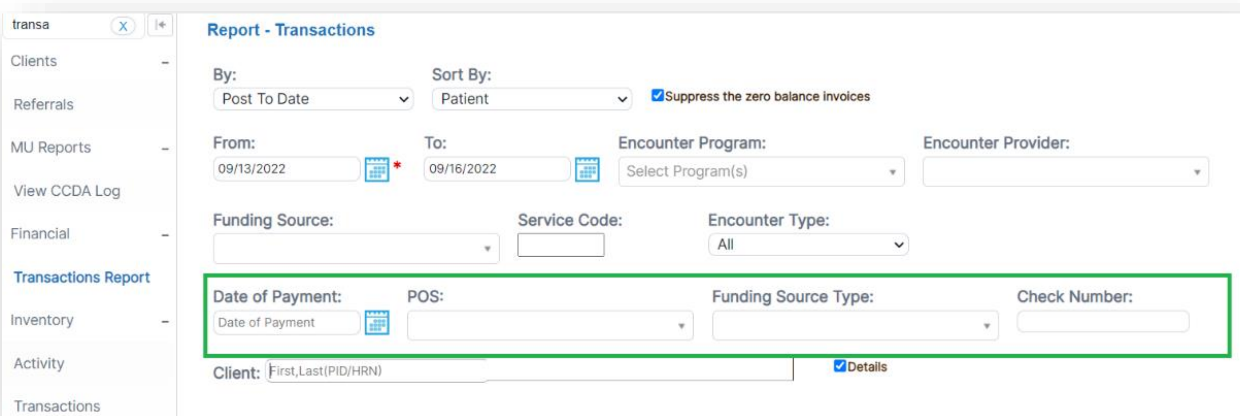
- Insurance Type or Funding Source Type, Place of Service, Contract Amount, Expected Contractual Adjustment, Date of Payment, and Check Number.





The following filters are now available in the **Transactions Report**:

- Date of payment, POS, Check Number, and Insurance Type.



Telehealth Participants Report

Core

Agencies using DrCloudEHR Telehealth now have a new report available named the **Telehealth Meeting Participants Report**. Clicking on the **Meeting ID** will now display the Telehealth participants' details.

Note:
1. The meeting link on this report is only available once the meeting has been started and ended.
2. The report will only show information for meetings that have ended at least 15 minutes prior to running the report.