



RevolutionEHR

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## **RevolutionEHR Release 4.4.2**

### **Release Notes**

**12/14/2008**

## Overview

The primary focus of Release 4.4.2 is to introduce the first phase of both inventory management and Eyefinity/VSP integration.

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## 1. Physical Inventory Management

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### 1.1 Introduction

#### 1.1.1 Overview

RevolutionEHR is being enhanced to allow practices to manage their physical inventory. This release provides the first step in a number of enhancements related to tracking physical inventory.

This release allows the configuration of product entries in the Physical Inventory Catalogue. The system does not yet deal with the actual quantities of items in stock. This will be enabled in the next release.

#### 1.1.2 Getting Started

The intent of first releasing the Catalogue configuration piece is to allow you time to populate the Catalogue in preparation for any year-end inventory counts you will be doing. The next release of RevolutionEHR will enable the tacking of inventory quantities.

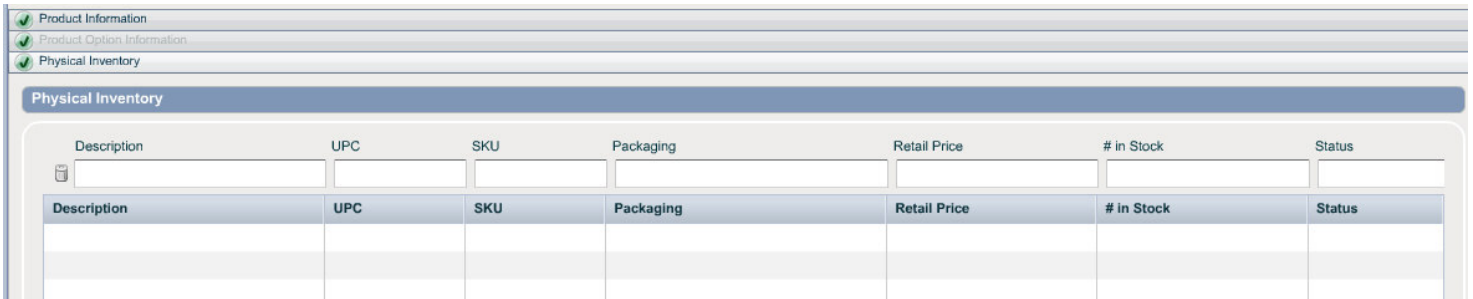
We strongly encourage you to review the attached document *Recommended Implementation Process for Physical Inventorty*.

## 1.2 Inventory configuration

As mentioned above, the primary focus of this release is to provide the ability for our users to configure their inventory “catalog” in preparation for actual inventory management tracking from within the application. The inventory configuration screen is found as a new screen/pane within a product details screen.

The content of the inventory configuration depends on the type of product being configured. That is, contact lens configuration screens are different than the configuration screens for frames. Currently, contact lenses, frames, and eyeglass lenses all have screens specific to their appropriate configuration attributes. The other product categories have the same screens.

The following is a general inventory configuration list screen:



Description	UPC	SKU	Packaging	Retail Price	# in Stock	Status

From this screen, the user can add new items, edit existing items, and deactivate existing items. When adding or editing a basic product inventory item, the following shows what data can be entered by the user:



revolutionEHR Physical Inventory

General Information

Category Contact Lens Solutions

Product My solutions

Description

UPC

SKU

Packaging

Retail Price \$59.00

# in Stock \* 0

OK OK & Add Another OK & Duplicate Cancel

On this detail screen, you will see that the user can make changes to this specific entry. When the user presses OK, this entry is saved and the details window is removed by the system. However, if the user wants to continue to add another item, he/she can press the "OK & Add Another" button or the "OK & Duplicate" button. The "OK & Add Another" will save the current information and then clear out the fields on this screen for adding another inventory item for the selected product.

On the other hand, by pressing the "OK & Duplicate" button, the system will save the current entry, but then leave the contents of that saved item in the fields so that the user can make changes as necessary for this new configuration entry. This is especially useful when adding configuration items that are basically the same with only minor differences between them.

This concept applies to the other product categories that have different configuration detail screens (contact lenses, frames, and eyeglass lenses).

Below are examples of those specific screens:

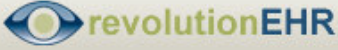
### Contact Lens List Screen

Product Information  
 Product Option Information  
 Physical Inventory

Physical Inventory

Description	UPC	SKU	Packaging	Retail Price	# in Stk	Status	Color	Trial	BC	Sph	Cyl	Axis	Diam	Add	Add Des

### Contact Lens Detail Screen


Physical Inventory ✕

**General Information**

**Category** Contact Lenses

**Product** Air Optix

**Description**

**UPC**

**SKU**

**Packaging**

**Retail Price**

**# in Stock \***

**Contact Lens Information**

**Trial**

**Base Curve**

**Sphere**

**Cylinder**

**Axis**

**Diameter**

**Add Power**

**Add Designation**

**Color**


### Frame List Screen

Product Information  
 Product Option Information  
 Physical Inventory

**Physical Inventory**

Description	UPC	SKU	Packaging	Retail Price	# in Stk	Status	Color	Eye	Bridge	Temple	ScrToScr	A	B	DBL	Circ	ED	EDAng

### Frame Detail Screen


Physical Inventory ✕

**General Information**

**Category** Eyeglass Frames

**Product** Beta Bordeaux

**Description**

**UPC**

**SKU**

**Packaging**

**Retail Price**

**# in Stock** \*

**Eyeglass Frame Information**

Color	Eye	Bridge	Temple	ScrToScr	A	B	DBL	Circ	ED	EDAng
Bordeaux	48.0	18.0	145.0 mm	135.0			18.0			
Natural	48.0	18.0	145.0 mm	135.0			18.0			
Gold	48.0	18.0	145.0 mm	135.0			18.0			
Gunmetal	48.0	18.0	145.0 mm	135.0			18.0			
Lavender	48.0	18.0	145.0 mm	135.0			18.0			
Espresso	48.0	18.0	145.0 mm	135.0			18.0			


## Eyeglass Lens List Screen

Product Information  
 Product Option Information  
 Physical Inventory

**Physical Inventory**

Description	UPC	SKU	Packaging	Retail Price	# in Stock	Status	Sphere	Cylinder	Diameter	Material	Lens Type

## Eyeglass Lens Detail Screen


Physical Inventory

**General Information**

**Category** Eyeglass Lenses

**Product** sv sph pl - 4.00

**Description**

**UPC**

**SKU**

**Packaging**

**Retail Price** \$22.00

**# in Stock \***

**Eyeglass Lens Information**

**Sphere**

**Cylinder**

**Diameter**

**Material**

**Lens Type**



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## **2. Eyefinity/VSP Integration**

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### **2.1 Eligibility/Authorization**

In this release, we have built in the functionality to integrate with Eyefinity/VSP for eligibility and authorization processing. However, we are still awaiting final certification and approval and have disabled this functionality in the application until that has happened. At that time, we will “flip the switch” and enable this functionality for everyone. Accompanying this will be detailed instructions and releases notes, as well as several webinars to help your office start taking advantage of these features.

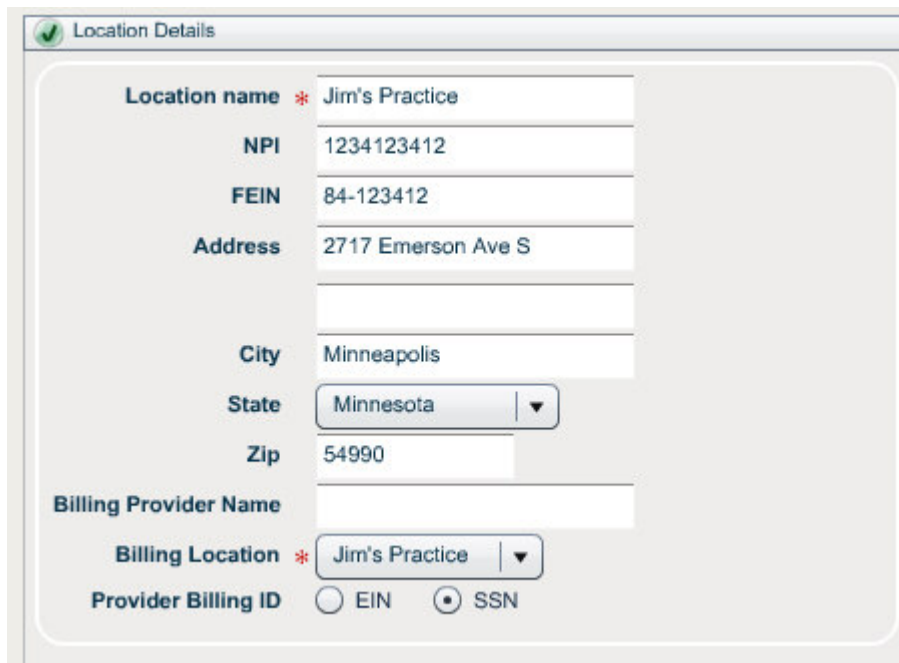
## 3. Other Enhancements

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### 3.1 Accounting

#### 3.1.1 Provider ID selection on CMS 1500

On the location administration screen, we have provided the ability for the location to configure which provider ID (FEIN or SSN) to put on the insurance claim (Box 25 of the CMS 1500). If this option is not set, the system will continue to use the ID that was used previously. The following shows where this item is configured on the location details screen:



The screenshot shows a web form titled "Location Details" with a green checkmark icon. The form contains the following fields and options:

Location name *	Jim's Practice
NPI	1234123412
FEIN	84-123412
Address	2717 Emerson Ave S
City	Minneapolis
State	Minnesota
Zip	54990
Billing Provider Name	
Billing Location *	Jim's Practice
Provider Billing ID	<input type="radio"/> EIN <input checked="" type="radio"/> SSN

### 3.1.2 Insurance company priority and type on billing screen

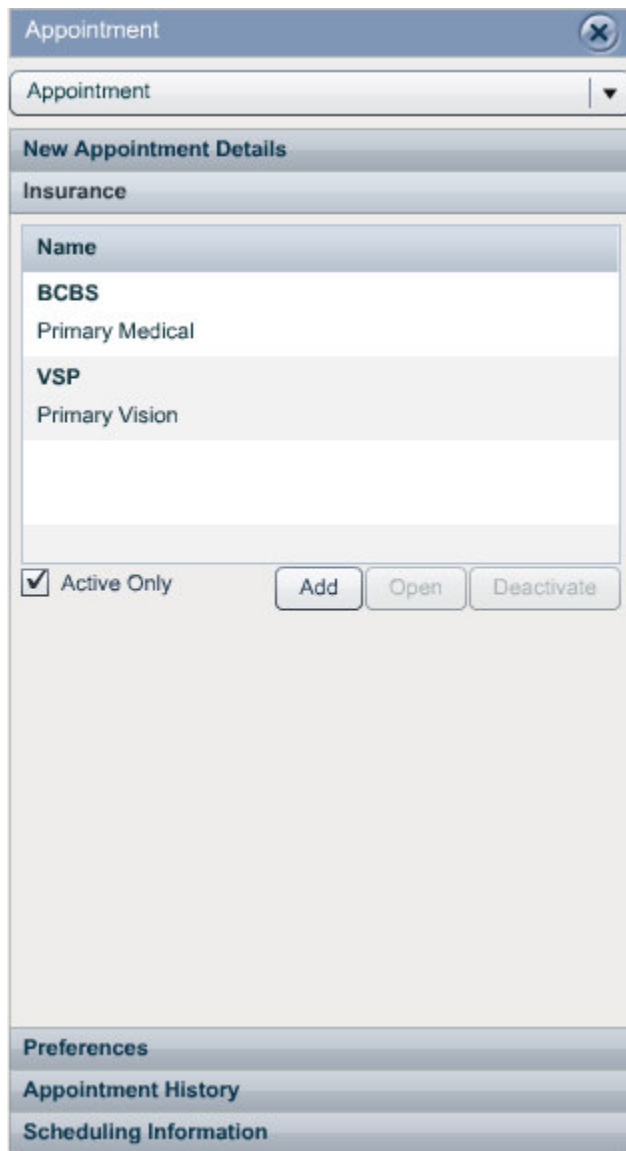
On the encounter checkout billing screen and order billing screen, the system now displays the insurance priority and type in the Payor List in addition to the insurance company name. The following shows an example of this change:

Check-Out			
Payors/Invoices			
	#	Payor Name	Balance
	194	Schneider, Hayden	\$108.95
✓	193	BCBS (Primary Medical)	\$310.00
		Insurance B (Tertiary Vision)	N/A
		Insurance A With A Really Long Name of...	N/A
	280	VSP (Primary Vision)	\$39.00

## 3.2 Scheduling

### 3.2.1 Insurance List on appointment booking screen

The appointment booking screens (slider) has been enhanced to display the list of insurance companies configured for the patient. The user can review this list, edit the information, add a new insurance company policy, or deactivate any item in the list. The following is a view of the insurance company listing screen on the appointment booking slider:



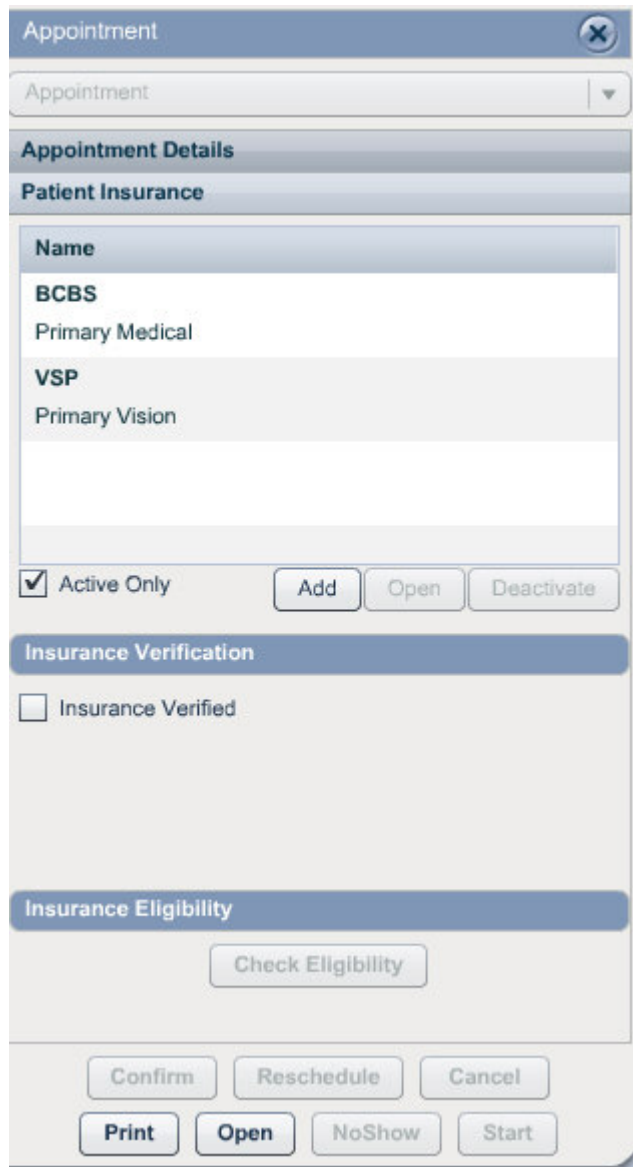
The screenshot shows a window titled "Appointment" with a close button. Below the title bar is a dropdown menu currently set to "Appointment". The main content area is titled "New Appointment Details" and contains an "Insurance" section. This section lists two insurance policies:

Name
<b>BCBS</b> Primary Medical
<b>VSP</b> Primary Vision

Below the list, there is a checkbox labeled "Active Only" which is checked. To the right of the checkbox are three buttons: "Add", "Open", and "Deactivate". At the bottom of the window, there are three tabs: "Preferences", "Appointment History", and "Scheduling Information".

### 3.2.2 Insurance Verification

Similar to above, the appointment details slider will also display this insurance company list, but also provides a way for the user to mark whether insurance for the patient has been verified and enter any comments regarding the verification process. The following shows insurance list pane in the main appointment details slider:



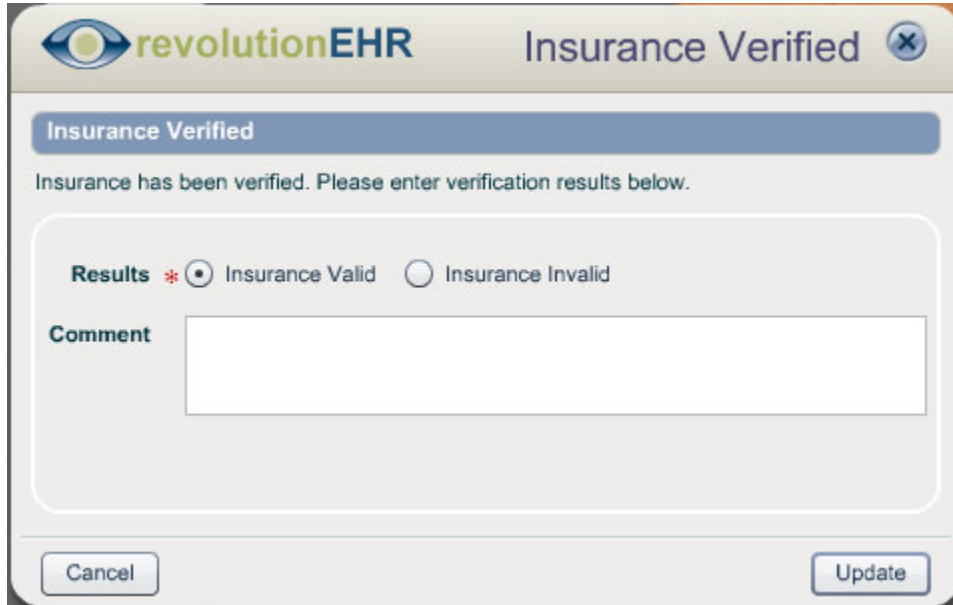
The screenshot shows a software interface for appointment management. At the top, there is a window titled "Appointment" with a close button. Below the title bar is a dropdown menu currently set to "Appointment". The main content area is divided into several sections:

- Appointment Details**: A header section.
- Patient Insurance**: A section containing a list of insurance providers:
  - Name**: A header for the list.
  - BCBS**: A provider name with "Primary Medical" listed below it.
  - VSP**: A provider name with "Primary Vision" listed below it.
- Active Only**: A checkbox that is checked, followed by "Add", "Open", and "Deactivate" buttons.
- Insurance Verification**: A section with a "Insurance Verified" checkbox that is currently unchecked.
- Insurance Eligibility**: A section with a "Check Eligibility" button.

At the bottom of the interface, there are two rows of buttons: "Confirm", "Reschedule", and "Cancel" in the first row; "Print", "Open", "NoShow", and "Start" in the second row.

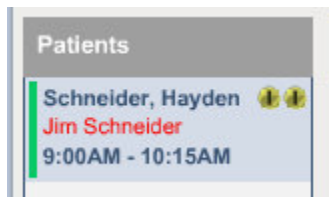
When the insurance for the patient has been verified, the user can check the "Verified" check box. When doing so, the system will prompt the user to indicate whether the insurance was valid or invalid and then enter any

necessary comments. If the insurance is marked as invalid, the comment field becomes a required field to force the user to enter the reason why the insurance for the patient is deemed invalid. The following shows the insurance verification entry screen.

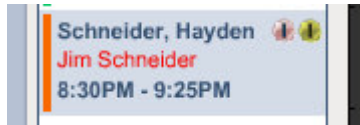


To assist with the insurance verification process, we have added another “ball” indicator in the appointment vertical list to graphically show the user whether the insurance has been verified by the user and whether the insurance was deemed as valid or invalid. This new indicator is on the “top row” of each appointment entry, the left most indicator/ball in the horizontal left (i.e. the confirmation indicator is still in the same place). A mouse over on this indicator will display the comments entered when verifying the insurance.

The following depicts an appointment for a patient whose insurance has not yet been verified:



The following depicts an appointment for a patient whose insurance has been verified, but was deemed invalid by a user:



The following depicts an appointment for a patient whose insurance has been verified and was deemed valid by a user:



### 3.2.3 Additional Changes

- The patient's age has been added to the calendar entry in the horizontal view, as well as the tool tip/mouse over for that entry.

## 3.3 Contact Lens Trial

- We have added a tooltip for the contact lens trial comment on the trial listing screen so that the entire comment can be read by moving the mouse over that comment field.

## 3.3 Administration

- On the patient search screen in administration, the "Active" flag was not working. This has been fixed.
- On the Drug Lookup screen in medication administration, we now put the cursor in the drug name field when the screen pops up and set the Enter key as the default so that you can start typing the drug name and press enter without having to use the mouse.

## 3.4 Insurance company list

- On the patient insurance company screen, we have changed the display to display some detailed information about the insurance company. Of note is the fact that the web site address/URL is an "active" link that when clicked,

will open a browser window to that web site. The follow shows a sample screen:

Company Information	Priority	Type	Policy Number	Group Number	Co-Pay	Status
<b>BCBS</b> 415 Downing St. Main: (222) 333-4432 Fax: (333) 444-5555 <a href="http://www.bluecross.com/claims">http://www.bluecross.com/claims</a>	Primary	Medical	ABCD-1234		\$25.00	Active
<b>VSP</b> 456 Some Street Main: (222) 123-1234 Fax: (303) 102-1234 <a href="http://www.vsp.com">http://www.vsp.com</a>	Primary	Vision	VAS-1234		\$0.00	Active