



RevolutionEHR

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RevolutionEHR Release 4.4.17

Release Notes

11/09/2009

Overview

Two main enhancements added with this release were the ability to create recurring appointments and the ability to void credits and refunds.

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1. Enhancements

1.1.1 Accounting

1.1.1.1 Reports

Added the option of “by provider” to the current Deposit report. The drill down order on this report will be identical to the existing report for Receipts by provider:

Provider
Payor Type
Payor
ID

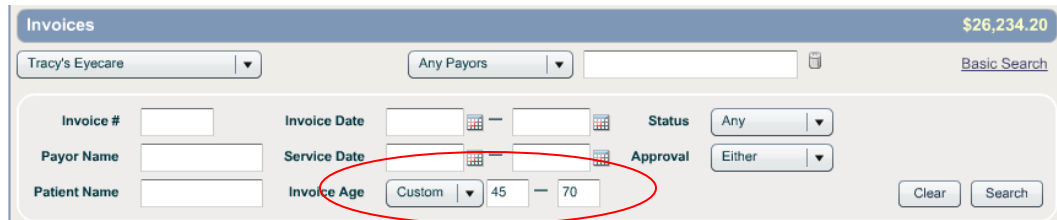
1.1.1.2 Advanced Search

The search based on age has been enhanced to allow the user to search by invoice age based on manually entered age(s)

The original set of preconfigured age selections are still available within the age drop down found in the “Advance Search” feature in the Accounting Module.

To search by a manually entered age select “Custom” from the “Age” drop down in “Advanced Search”

To fields exist for entering an age range. The first field sets the “From” age; the second field indicates the “To” age. For example, viewing invoices with ages from 45 to 70 days would be entered as:



The screenshot shows the 'Invoices' search interface. At the top right, the total amount is \$26,234.20. The search criteria include 'Tracy's Eyecare' for the provider and 'Any Payors' for the payor type. The search filters are: Invoice #, Invoice Date, Status (Any), Payor Name, Service Date, Approval (Either), Patient Name, and Invoice Age. The Invoice Age field is highlighted with a red circle and is set to 'Custom' with a range of 45 to 70. There are 'Clear' and 'Search' buttons at the bottom right.

The age entered is inclusive; meaning that in the example above the ages of 45 and 70 will be included in the search results.

Leaving the first field blank will create search results containing invoices starting at age 0. For example, search criteria for blank to 70 will contain invoices from 0 to 70 days old

Leaving the second field blank will create search results containing all invoices older than the age indicated in the first field. For example, search criteria for 45 to blank will contain all invoices 70 days and older.

1.1.1.3 Voiding Credits and Refunds

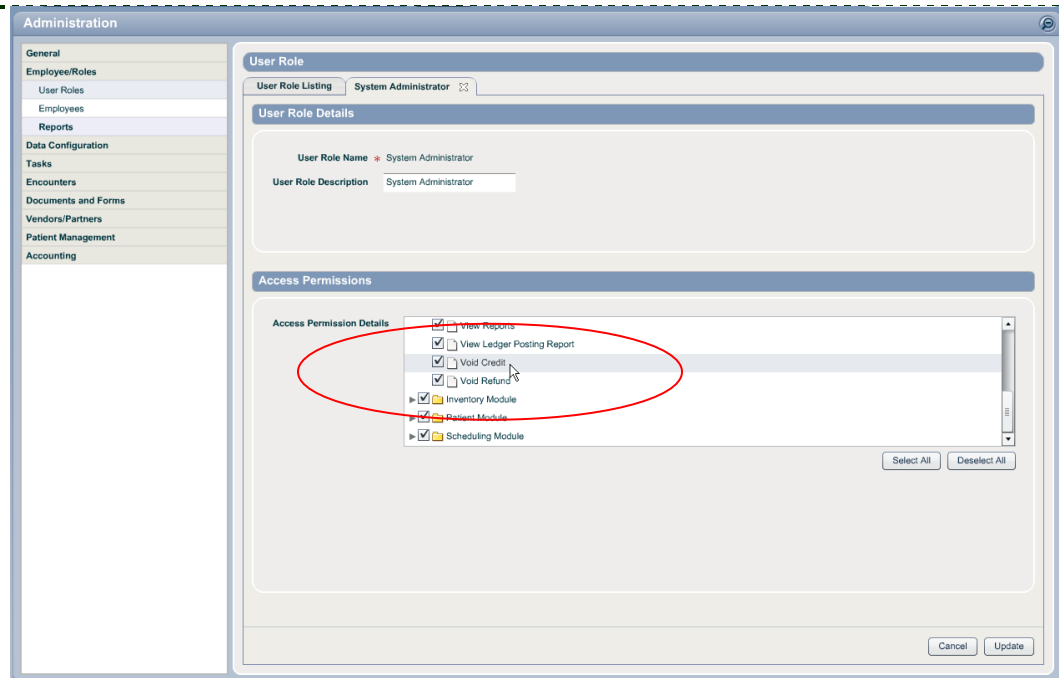
The ability to void an existing credit and/or refund has been added. Restriction access to this feature has also been added. By default no user role will have this access; it must be manually added before you can use this new feature.

IMPORTANT NOTE: Because the void credit and void refund button will allow users to void any credit or refund it is strongly recommended that this access be restricted to key staff. Voiding is a permanent action and cannot be undone; therefore, it will be helpful if this ability is given only to specific staff for control purposes.

- *Setting Access Permission*

Like all access permission settings, this is done at the "User Role" level.

Go to Administration/Employee, Roles/User Roles; open the appropriate user role; click "edit"; click the expand triangle to the left of "Accounting"; scroll down the list; check the boxes for "Void Credit" and "Void Refund". All employees that have been given this user role will now have the ability to void credits and refunds

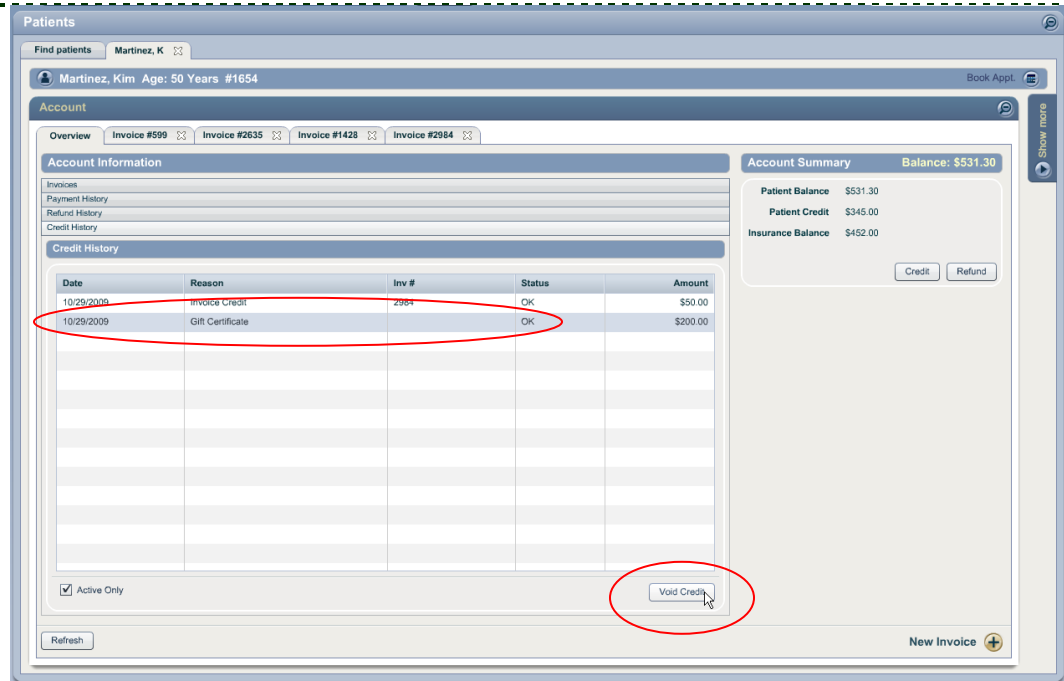


- *Voiding a credit*

A credit can be voided regardless of the patient credit balance or the method in which the credit was created. Take great care before voiding any credits. If the credit being voided is larger than the patient's current credit balance, the credit balance will simply be reduced to \$0.00.

From within a patient file, open the "Account" component; click on the "Credit History" slider:

Click on the credit you wish to void to highlight that line; click "void credit"



Patients

Find patients: Martinez, K

Martinez, Kim Age: 50 Years #1654

Account

Overview Invoice #599 Invoice #2635 Invoice #1428 Invoice #2984

Account Information

Account Summary Balance: \$531.30

Date	Reason	Inv #	Status	Amount
10/29/2009	Invoice Credit	2984	OK	\$50.00
10/29/2009	Gift Certificate		OK	\$200.00

Account Summary

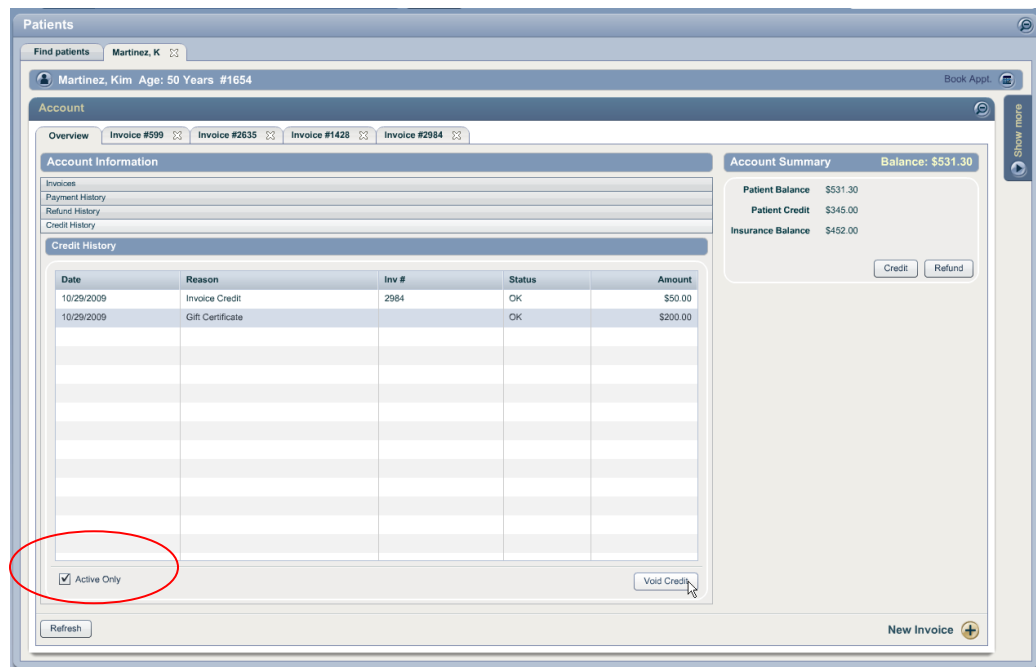
Patient Balance	\$531.30
Patient Credit	\$345.00
Insurance Balance	\$462.00

Active Only Void Credit

Refresh New Invoice

The credit will be removed from the list of active credits in the "Credit History" slider.

To view all credits, including credits that have been voided, remove the check mark from the "Active Only" check box



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Account

Overview Invoice #599 Invoice #2635 Invoice #1428 Invoice #2984

Account Information

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Active Only Void Credit

Refresh New Invoice

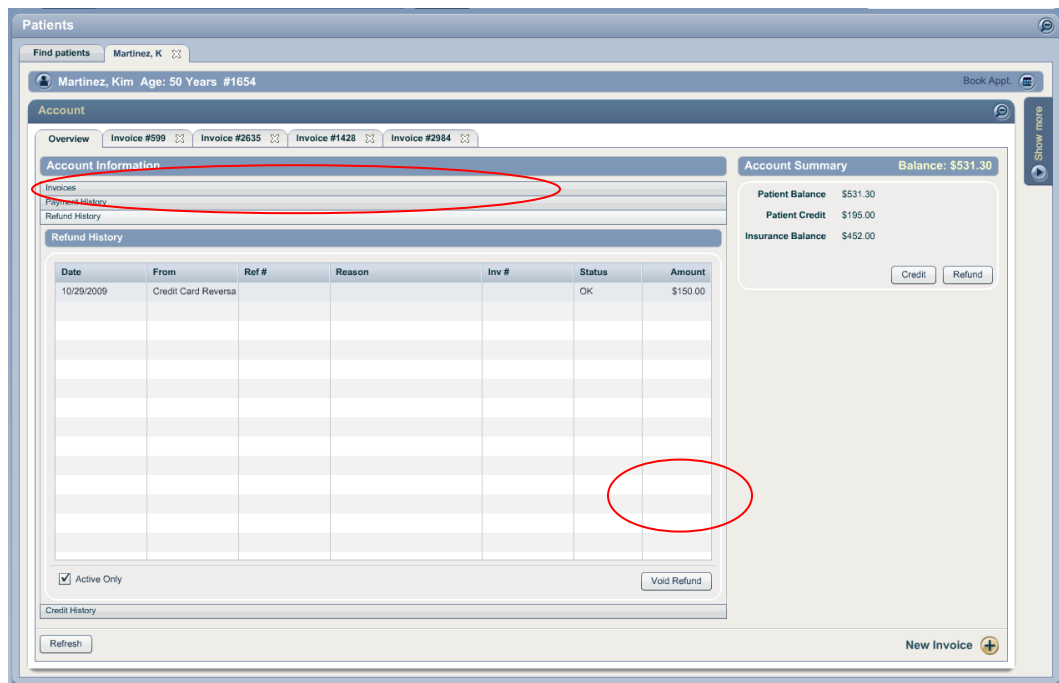
- Voiding a refund

Any refund can be voided. When a refund is voided the patient will be given a credit equally the amount of the voiding refund.

IMPORTANT NOTE: If you are voiding a credit and its corresponding refund, you **MUST** void the refund first. Voiding the credit first will automatically create a new credit when the refund is voided. You will not be able to void the new credit.

From within a patient file, open the "Account" component; click on the "Refund History" slider:

Click on the refund you wish to void to highlight that line; click "void refund"



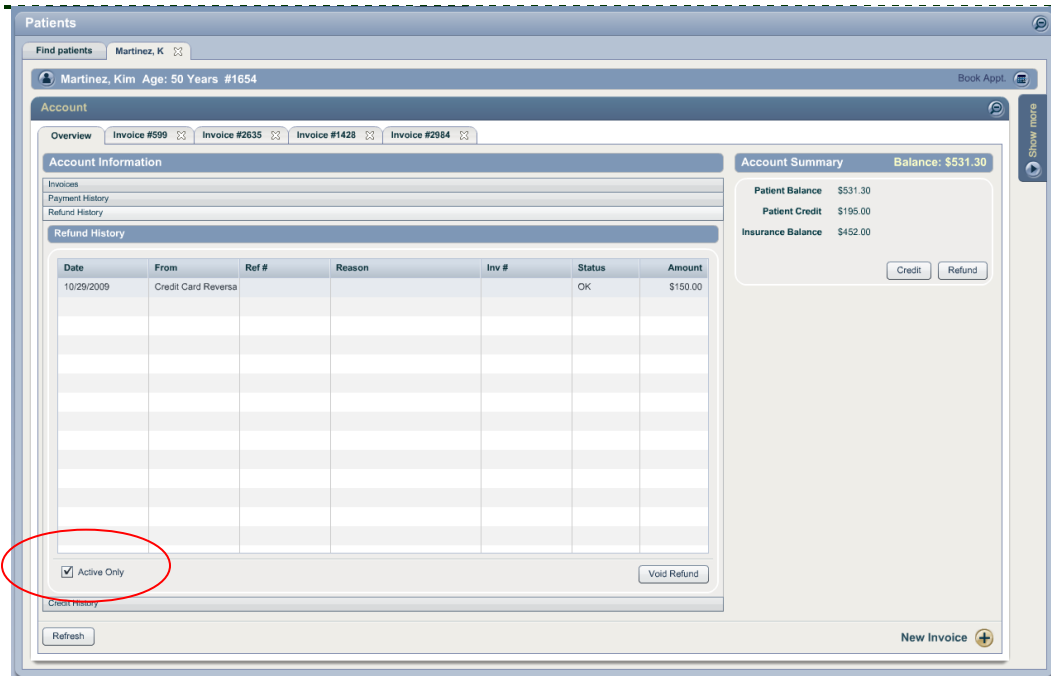
The screenshot displays the "Patients" interface for a patient named Kim Martinez. The "Account" section is active, showing "Account Information" and "Refund History". The "Refund History" table contains one entry:

Date	From	Ref #	Reason	Inv #	Status	Amount
10/29/2009	Credit Card Reversa				OK	\$150.00

Below the table is a "Void Refund" button. The "Account Summary" on the right shows a balance of \$531.30, with Patient Credit at \$195.00 and Insurance Balance at \$452.00. A "New Invoice" button is located at the bottom right.

The refund will be removed from the list of active credits in the "Credit History" slider.

To view all refunds, including refunds that have been voided, remove the check mark from the "Active Only" check box



Recommendation: If a credit and/or refund was created within an invoice using the "Issue Refund" button, "INFO" line items were added to that invoice referencing the credit and/or refund that was created.

If you are voiding a credit or refund that was created within an invoice, it is recommended that you open that invoice and remove the INFO line items to avoid confusion at a later time.

If the invoice is already marked as "paid" use the blue edit button next to "status" in the invoice details to change the invoice status to "active" and unauthorized.

When you are finished removing the INFO line items re-authorize the invoice and change the status back to "paid"

1.1.2 Scheduling

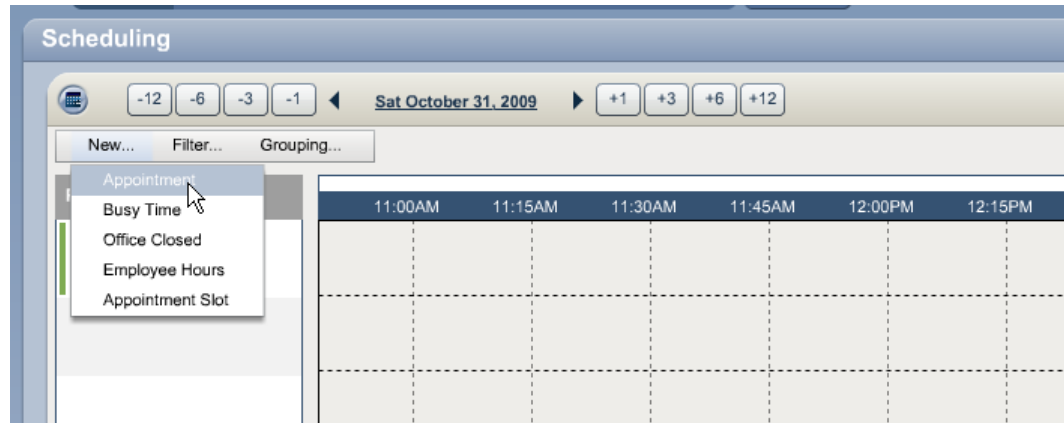
1.1.2.1 Recurring Appointments

The ability to book more than one appointment at a time has been added to the Scheduling Module.

Note: The recurring appointment feature is only available when using appointment slots.

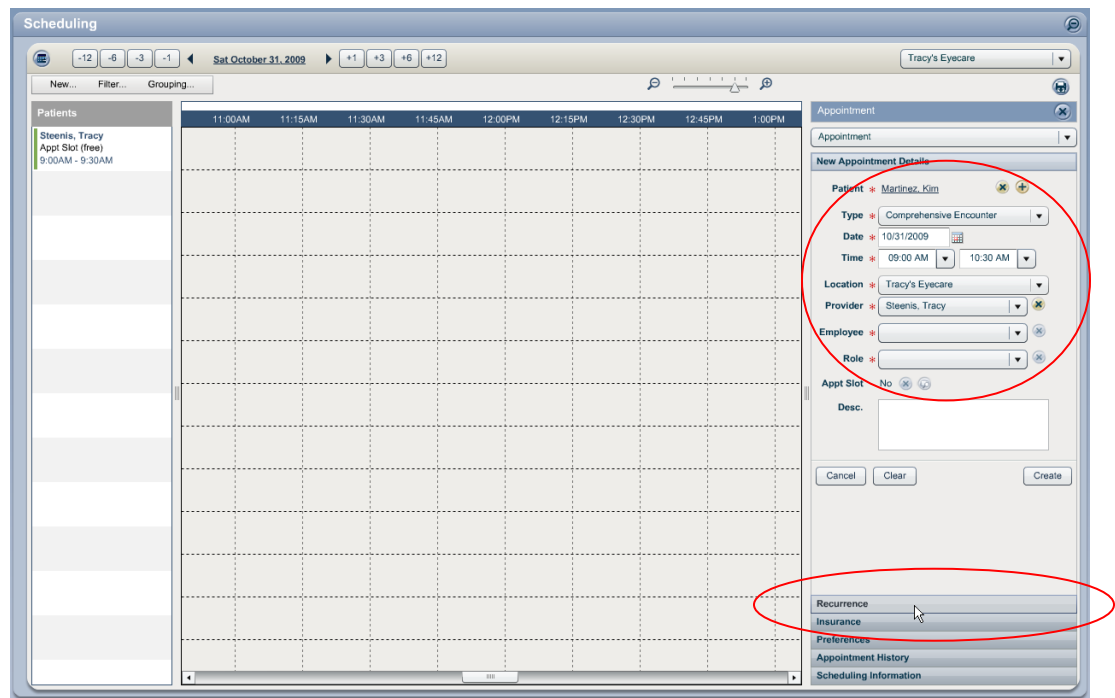
The recurring appointment feature works very much like the existing slot finder option.

To book multiple appointments for a single patient click "New" and "Appointment" within the Scheduling Module. No need to be looking at any specific day

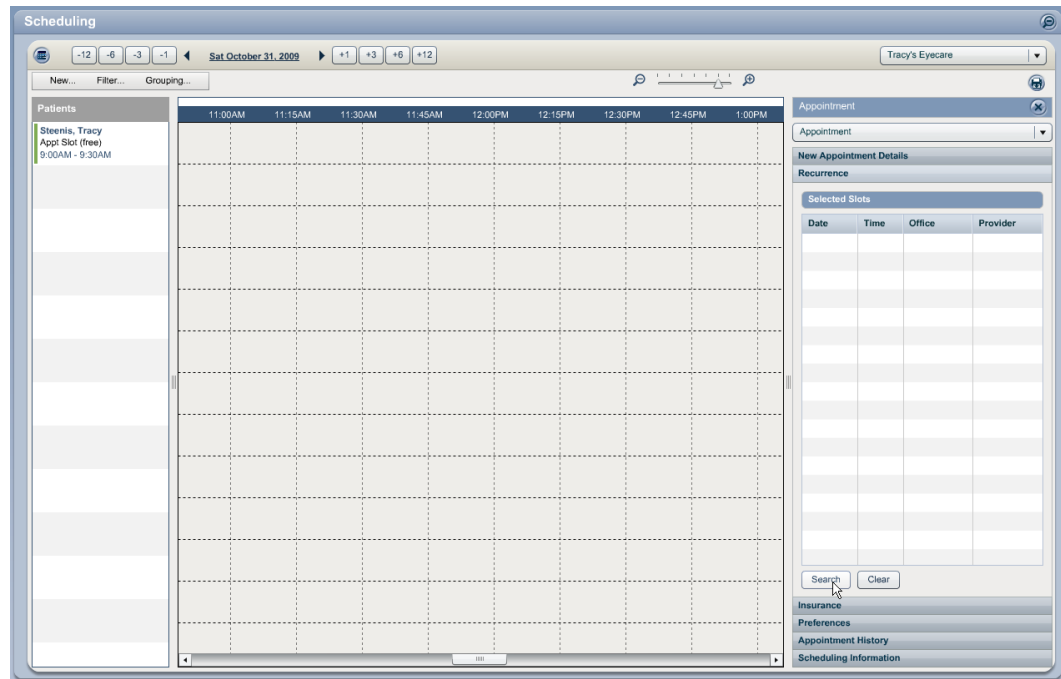


In the "New Appointment Details" panel that opens on the right, enter the patient name, type, location, and either provider, employee or role (this will depend on how you have configured your slots).

Click on the "Recurrence" slider at the bottom of the panel




Click "Search" in the "Recurrence" slider



The slot finder screen will open. This is the same screen that you have been using to find a single slot. The new enhancement now allows you to select more than one slot from this screen.

There are two options for highlighting more than one slot

To select slots that do not fall one after the other in the list, hold down your "Ctrl" key and click on each slot you wish to select. Each highlighted slot will be included in the selection:


Find Openings ✕

Search Criteria

Search Start * 10/29/2009 +1 +3 +6 +12

Search End * 11/29/2009

Type * Comprehensive Encounter ✕

Location Tracy's Eyecare ✕

Employee Steenis, Tracy ✕

Role - Select - ✕

Include Prefs

Day/Time Preferences

Sunday -Select-

Monday Late Morning (9:00AM - 11:00AM)

Tuesday Anytime

Wednesday -Select-

Thursday Anytime

Friday -Select-

Saturday -Select-

Date	Time	Location	Provider/Employee/Role
Thu October 29, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Thu October 29, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Mon November 02, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Tue November 03, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Tue November 03, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Thu November 05, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Thu November 05, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Mon November 09, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy

To select multiple slots that fall one right after the other in the list, you may use the "Ctrl" button and select them one at a time. Or, you may click on the first slot you wish to select, hold down the "Shift" key and click on the last slot you wish to select. The first and last slot, as well as all of the slots in between will be selected:


Find Openings ✕

Search Criteria

Search Start * 10/29/2009 +1 +3 +6 +12

Search End * 11/29/2009

Type * Comprehensive Encounter ✕

Location Tracy's Eyecare ✕

Employee Steenis, Tracy ✕

Role - Select - ✕

Include Prefs

Day/Time Preferences

Sunday -Select- ▼

Monday Late Morning (9:00AM - 11:00AM) ▼

Tuesday Anytime ▼

Wednesday -Select- ▼


Thursday Anytime ▼

Friday -Select- ▼

Saturday -Select- ▼

Date	Time	Location	Provider/Employee/Role
Thu October 29, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
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Thu November 05, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Thu November 05, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Mon November 09, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy

When the appropriate slots have been highlighted, hit "Select"


Find Openings ✕

Search Criteria

Search Start * 10/29/2009 +1 +3 +6 +12

Search End * 11/29/2009

Type * Comprehensive Encounter ✕

Location Tracy's Eyecare ✕

Employee Steenis, Tracy ✕

Role - Select - ✕

Include Prefs

Day/Time Preferences

Sunday -Select-

Monday Late Morning (9:00AM - 11:00AM)

Tuesday Anytime

Wednesday -Select-

Thursday Anytime

Friday -Select-

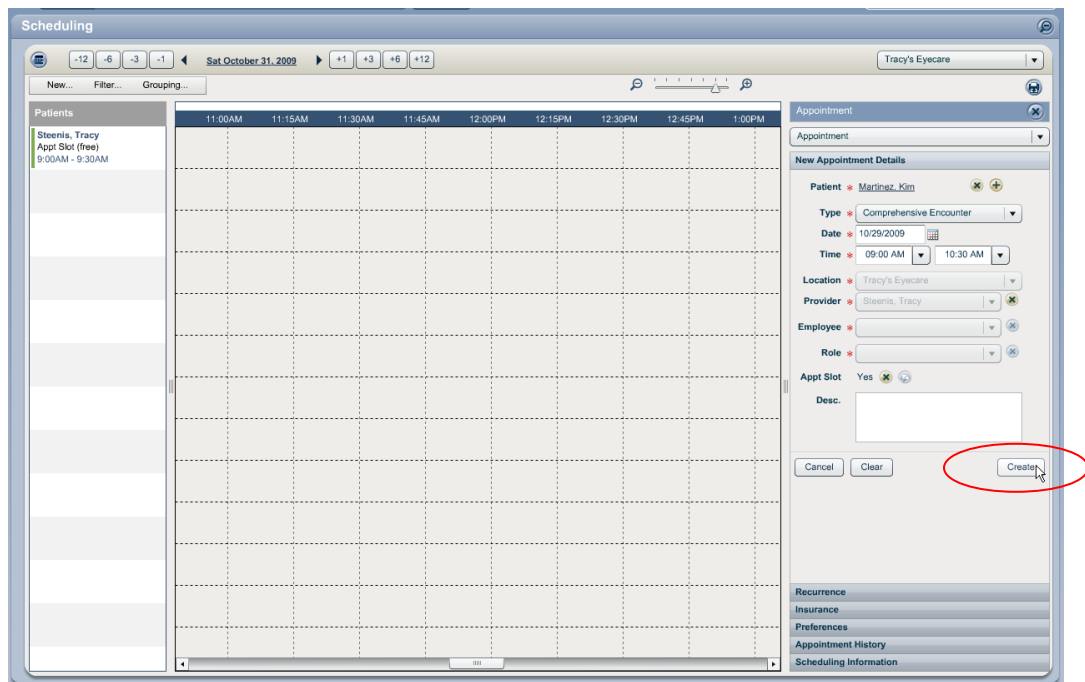
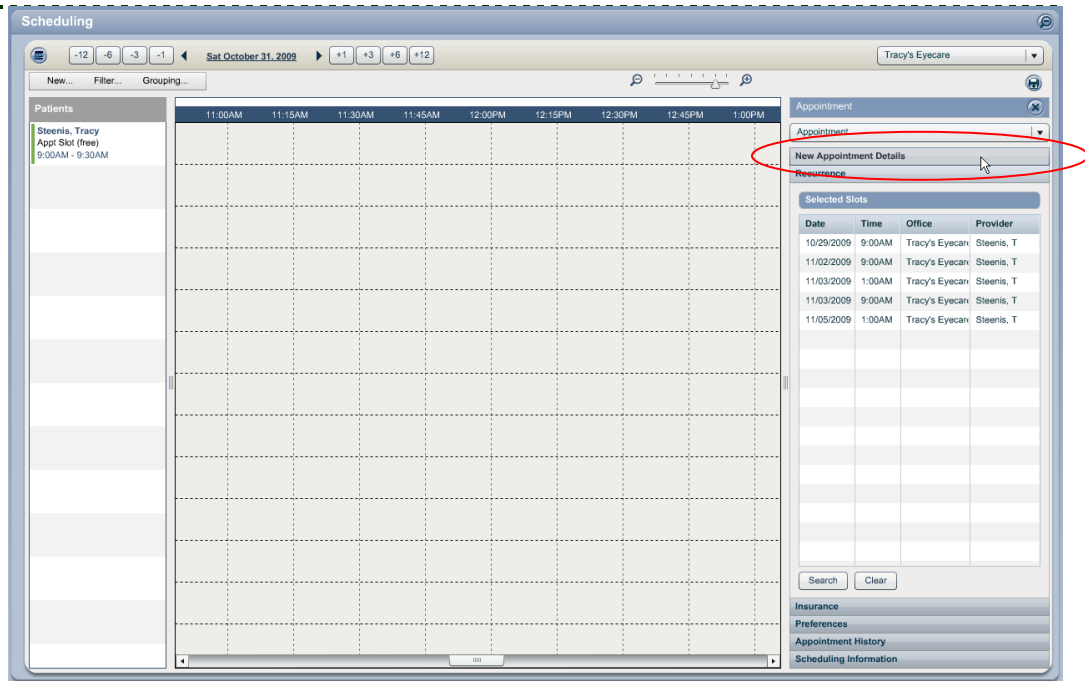
Saturday -Select-

Date	Time	Location	Provider/Employee/Role
Thu October 29, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Thu October 29, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Mon November 02, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Tue November 03, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Tue November 03, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Thu November 05, 2009	1:00AM	Tracy's Eyecare	Steenis, Tracy
Thu November 05, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy
Mon November 09, 2009	9:00AM	Tracy's Eyecare	Steenis, Tracy

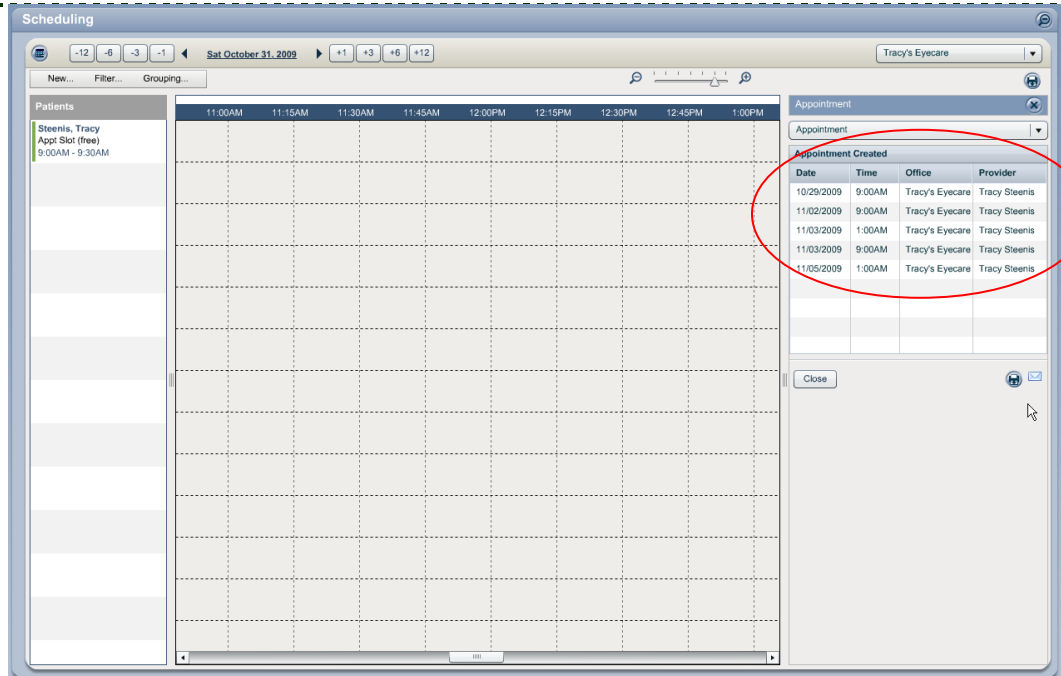
You will then be taken back to the "Recurrence" slider in the "New Appointments" panel.

The selected slots will be listed here.

Important: To complete the booking process you must click on the "New Appointments Details" slider and hit "Create". If you do not hit "Create" the appointments will not be booked

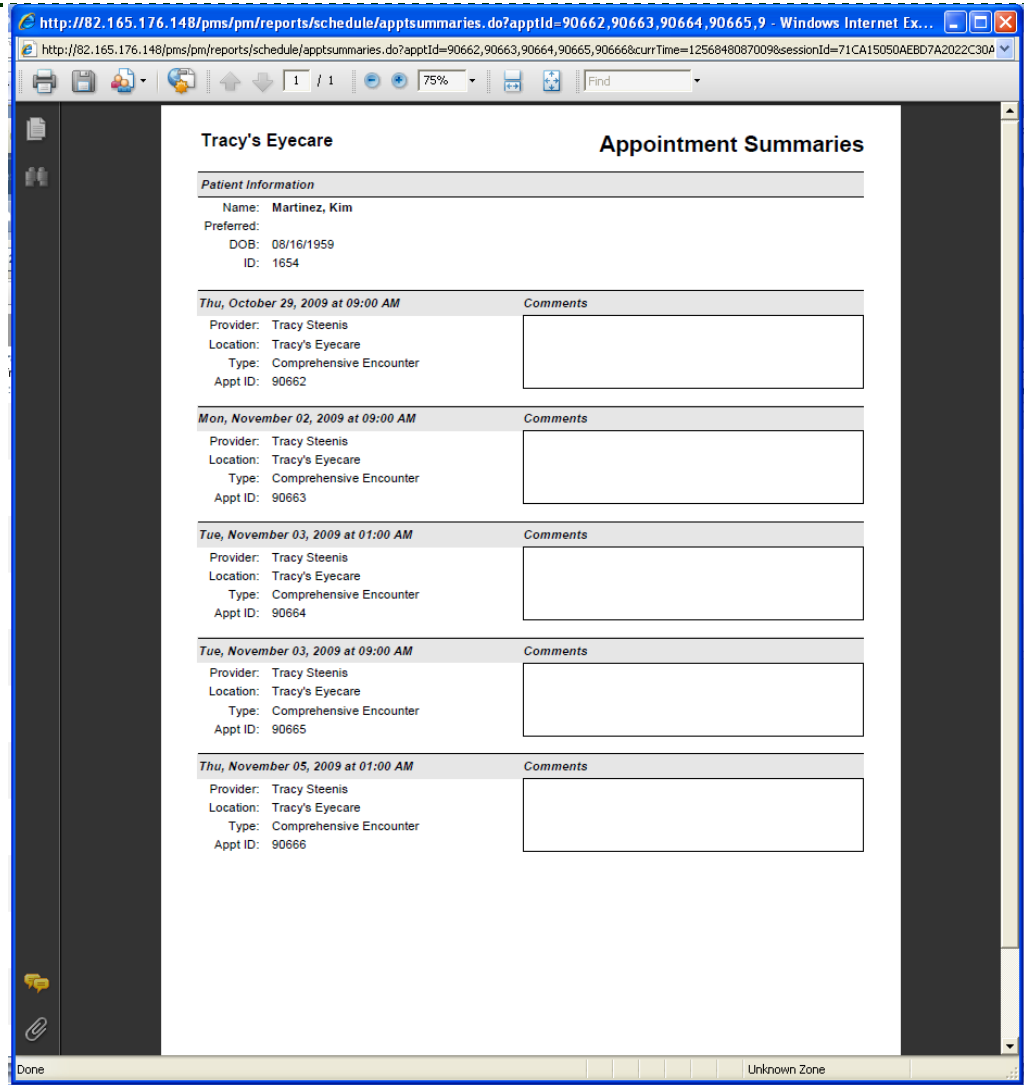


Once "Create" has been clicked, the panel will display the list of appointments that have been created:



Date	Time	Office	Provider
10/29/2009	9:00AM	Tracy's Eyecare	Tracy Steenis
11/02/2009	9:00AM	Tracy's Eyecare	Tracy Steenis
11/03/2009	1:00AM	Tracy's Eyecare	Tracy Steenis
11/03/2009	9:00AM	Tracy's Eyecare	Tracy Steenis
11/05/2009	1:00AM	Tracy's Eyecare	Tracy Steenis

Just like a single appointment you can click the printer icon to print a summary for the patient, or click on the envelop icon to send an appointment summary email to the patient.



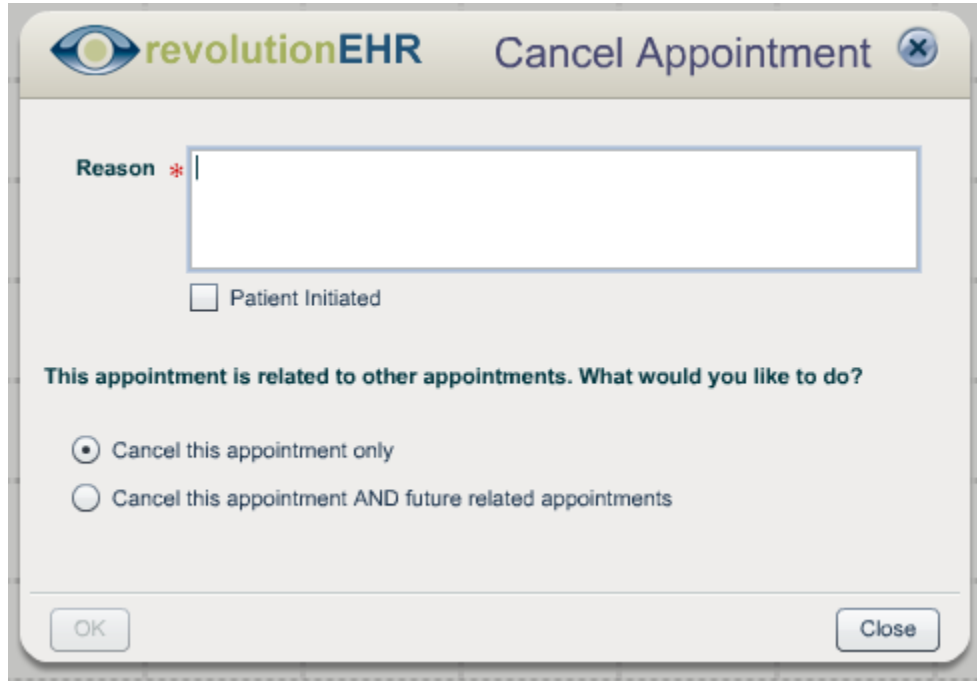
The recurring appointments created will be displayed like all other appointments within the Scheduling Module.

- *Canceling a recurring appointment*

When clicking "Cancel" for any appointment that was booked using the recurring appointment feature you will be prompted to indicate if only that appointment should be cancelled or if you would like to cancel that appointment and all future appointments. The "Future" appointments only include the other appointments that were created using the recurring appointment feature and are associated to the appointment being cancelled.

If you would like to cancel all appointments that were booked using the recurring appointment feature, it is best to cancel the first appointment in the list and select "Cancel this appointment AND future related appointments"

A reason for cancelling must be typed in the "Reason" field before "OK" will activate:



- Rescheduling a recurring appointment

The "Reschedule" button will reschedule only that appointment. All other related recurring appointments will be left unchanged.

- Confirming a recurring appointment

The "Confirm" button will confirm only that appointment. All other related recurring appointments will be left unchanged.

- Starting a recurring appointment

The "Start" button will start only that appointment. All other related recurring appointments will be left unchanged.

1.1.3 Marketing

All searches that are exported out of the Marketing Module have been enhanced to include the patient's date of birth.

2. Fixes

2.1.1 Orders

2.1.1.1 Billing

In our last release an issue occurred that would use the left eye quantity on both eyes when creating billable items within a contact lens order. This issue has been resolved.

2.1.2 Accounting

2.2.1.1 Voiding a credit payment

Previously voiding a payment that was made using the patient's credit would update the patient's credit balance appropriately, but would not update the patient's balance. This has been fixed.

Voiding a credit payment will increase the patient's credit balance by the amount of the credit payment that was voided and will also increase the patient balance if voiding the credit payment resulted in a balance on the invoice.

2.2.1.2 Voiding an invoice with an "INFO" line item

An error would occur when trying to void an invoice that contained an "INFO" line item. This has been changed to allow users to void those invoices.

IMPORTANT NOTE: Voiding is a permanent action and cannot be undone. Please take great care when voiding any invoice to ensure that the void is absolutely necessary.

2.2.1.3 Adding a service to an invoice

Using the "+" button to add a service to an invoice was displaying inactive services. This has been fixed to display only active services.