



RevolutionEHR

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RevolutionEHR Release 4.4.21

Release Notes

03/02/2010

Overview

The main focus of this release is the enhancement of the current inventory report, as well as the addition of 3 new inventory reports.

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1. Enhancements

1.1 Inventory Reports

Significant enhancements have been made to the Inventory Reports screen. To access Inventory Reports go to the Inventory Module under the “More” drop down at the top of the screen; click “Inventory Reports” in the upper right corner.

1.1.1 Data displayed within Inventory reports

The data displayed for all product categories using the current inventory report has been updated to also include “wholesale” cost that is set for the product associated to the physical inventory item being displayed within the inventory report.

1.1.2 Data displayed for Eyeglass Frames Inventory reports

The data displayed when running an inventory report for “Eyeglass Frames” has been changed to include:

- Color
- Eye
- Bridge
- Temple

Due to the additional columns now displayed in this search, it was necessary to eliminate some of the existing columns. The following data is no longer displayed for “Eyeglass Frames” inventory reports:

- Category
- Code

The data displayed for all other product categories remains the same as the data displayed prior to this release with the exception of the addition of wholesale cost.

1.1.3 Date field added to Inventory reports

A new “date” field has been added to the current inventory report as well as the three new inventory reports. This field allows the user to run the desired report based on the inventory numbers at the end of the day on the day specified in the new date field. By default the date displayed in this field is “today’s” date.

1.1.4 Aging Report

A new inventory report has been added that will allow the user to view physical inventory information based on the date that the physical inventory item was added to stock.

To run an aging report for inventory, go to the Inventory Reports screen and select "Aging" from the options listed on the left.

The date that is captured by RevolutionEHR for reporting purposes is set by the date that the stock quantity is changed or added for a specific physical inventory item. This can occur in three different ways:

- When the physical inventory item is first added and stock quantity is set at that time.
- Stock quantity can be changed at anytime by manually entering a new quantity number in the quantity field.
- "Receive Stock" will also allow the user to add to the stock quantity.

When stock quantity on a specific physical inventory item is greater than 1, the following rule is applied when that quantity is decremented:

The first item added is the first item removed

For example, the stock quantity on specific frame is changed to "1" on January 3rd, and the quantity is then increased to "2" on January 15th. When one of those frames is sold, RevolutionEHR will remove the frame that was added on January 3rd first. Therefore, the aging report on the remaining frame will show the age based on the frame added on January 15th.

Using the rule above the new inventory report will show the age based on current stock, in addition to the age based on any stock that ever existed for that item.

The grid displaying the results for the aging report in inventory will include the information regarding the physical inventory item. As with the other inventory reports this information has changed when "Eyeglass Frames" is specified, and will include size and color for any report specific to "Eyeglass Frames". The data for all other product categories remained the same as the data displayed previous to this release.

Regardless of product category, the aging report contains 6 columns referencing the age. The first three age columns are as follows:

- **Minimum Age Stocked:** This is the age of the newest stock for this specific physical inventory item that is currently still in stock.
- **Maximum Age Stocked:** This is the age of the oldest stock for this specific physical inventory item that is currently still in stock.
- **Average Age Stocked:** This is the average age of the stock for this specific physical inventory item based on the items that are still currently in stock



Manufacturer	Collection	Model	Color	Eye	Bridge	Temple	Inv. #	UPC	SKU	Stock	Min Age Stk	Max Age Stk	Avg Age Stk	Min Age	Max Age	Avg Age
Revolution Frame	Revolution Collect	R123		0.0	0.0	0.0 null	1			3	0.	28	18.7	0.	28	18.7
Revolution Frame	Revolution Collect	Revolution 1		0.0	0.0	0.0 null	2			0	0.	0.	0.0	0.	0.	0.0
More Frames Inc	XYZ Collection	XYZ 123	Brown	52.0	19.0	130.0 mm	3			1	21	21	21.0	0.	21	10.5
Revolution Frame	Revolution Collect	Revolution 1	Pewter	52.0	18.0	130.0 mm	96			1	0.	0.	0.0	0.	0.	0.0

The last three age columns are as follows:

- **Minimum Age:** This is the age of the newest stock for this specific physical inventory item. This number is historic, and will represent the age of the newest stocked item including items currently in stock and items no longer in stock
- **Maximum Age:** This is the age of the oldest stock for this specific physical inventory item. This number is historic and will represent the age of the oldest item stocked item including items currently in stock and items no longer in stock
- **Average Age:** This is the average age of all stock for this specific physical inventory item. This number is historic and will represent the average age of the items stocked including items currently in stock and items no longer in stock.



Manufacturer	Collection	Model	Color	Eye	Bridge	Temple	Inv. #	UPC	SKU	Stock	Min Age	Max Age	Avg Age	Min Age	Max Age	Avg Age
Revolution Frame	Revolution Collect	R123		0.0	0.0	0.0 null	1			3	0	28	18.7	0	28	18.7
Revolution Frame	Revolution Collect	Revolution 1		0.0	0.0	0.0 null	2			0	0	0	0.0	0	0	0.0
More Frames Inc	XYZ Collection	XYZ 123	Brown	52.0	19.0	130.0 mm	3			1	21	21	21.0	0	21	10.5
Revolution Frame	Revolution Collect	Revolution 1	Pewter	52.0	18.0	130.0 mm	96			1	0	0	0.0	0	0	0.0

The aging report can be filtered by the same criteria as the main inventory report.

The date field will determine the results of the age/stock based on the date entered into that field. By default the date field is set to today's date.

Using "Advanced Search" will allow you to filter by:

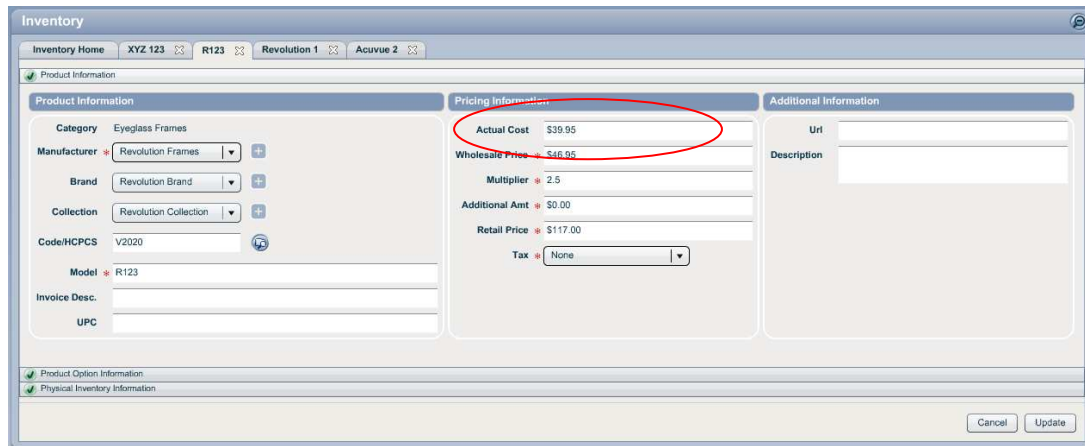
- Manufacturer
- Brand
- Collection
- Model
- Description
- UPC
- SKU
- Stock Quantity range

1.1.5 Inventory Report on Physical Inventory Item "Cost"

A new report has been added that will allow users to run a report based on stocked physical inventory items and the actual "cost" of those items.

To run a "Cost" report, go to Inventory; click "Inventory Reports" in the upper right corner; select "Cost" from the report list on the left.

"Cost" may be different than wholesale, as the "Actual Cost" is defined as the amount paid by the office for a specific physical inventory item. Previously "cost" could only be indicated when using the "receive stock" button. The field for setting "cost" has been added to the "Product Information" slider at the product level.



The screenshot shows the 'Inventory' window with the 'Pricing Information' tab active. The 'Actual Cost' field is highlighted with a red circle and contains the value '\$39.95'. Other pricing fields include 'Wholesale Price' (\$48.95), 'Multiplier' (2.5), 'Additional Amt' (\$0.00), 'Retail Price' (\$117.00), and 'Tax' (None). The 'Product Information' tab shows 'Category' as 'Eyeglass Frames', 'Manufacturer' as 'Revolution Frames', 'Brand' as 'Revolution Brand', 'Collection' as 'Revolution Collection', 'Code/HCPCS' as 'V2020', 'Model' as 'R123', 'Invoice Desc.', and 'UPC'.

Setting an "Actual Cost" in this field will default the "cost" for any physical inventory item created for this product. The cost can still be edited for a specific physical inventory item when using "Receive Stock":



The screenshot shows the 'Receive Stock' window. The 'Unit Cost' field is highlighted with a red circle and contains the value '\$39.95'. The '# Received' field is also highlighted with a red circle and contains the value '1'. The 'Category' is 'Eyeglass Frames' and the 'Product' is 'R123'. The 'Item #' is '1'. The 'Item Description' and 'Item UPC' fields are empty. The 'Comments' field is a large text area at the bottom. The 'OK' and 'Cancel' buttons are at the bottom right.

Using the "Actual Cost" field in the Product Option Information slider eliminates the need to set the "cost" every time a physical inventory item is received.

"Cost" is not a required data field, but if reporting is desired based on the actual cost to the practice for the physical inventory items, it is necessary to set a "cost". If "Cost" is not tracked by the office, reporting on the wholesale is still available in the standard inventory reports.

Because cost can vary for identical physical inventory items, a separate report has been created for reporting on actual cost.

When stock quantity on a specific physical inventory item is greater than 1, the following rule is applied when that quantity is decremented:

The first item added is the first item removed

For example, a physical inventory item for a frame is added on January 3rd, and the default cost for that frame product is set at \$40.00, and then on January 15th "Receive Stock" is used to increase the stock quantity on that physical inventory item to 2 and the "cost" is edited in "Receive Stock" to \$30.00. When one of those frames is sold, the app will remove the frame that was added on January 3rd first. Therefore, the cost report on the remaining frame will show the cost based on January 15th frame at \$30.00.

As with all other Inventory Reports, the Cost report can be run based on product category, and can be filter further using "Advanced Search". The new "Date" field is also available for Inventory Cost reports, allowing the user to run the report based on the stocked quantity and cost at the end of the day on the date set in the date field.

In addition to the standard columns displayed in all inventory report grids, the Cost report will display:

- Retail – this is the retail price associated to the physical inventory item being reported on.
- Wholesale – this is the wholesale price set in the Product Information slider for the product associated to the physical inventory item being reported on.
- Stock Quantity – this is the stock quantity as of the date specified in the "Date" field for the Cost report being run.
- Stock Retail – this is the total retail amount calculated by multiplying Retail and stock quantity for the physical inventory item being reported on.
- Stock Wholesale – this is the total wholesale calculated by multiplying Wholesale and stock quantity for the physical inventory item being reported on.
- Stock Cost – this is the total cost based on the stock quantity and the cost associated to each physical inventory item associated to that stock quantity. For example if there is a total of 2 for stock quantity, and one physical inventory item was added with the "cost" set to \$30.00, and the second physical inventory item was added with the "cost" set to \$40.00, the Stock Cost will display as \$70.00.



The screenshot shows the 'Inventory Reports' window. On the left is a sidebar with 'Reports' expanded, showing 'Inventory', 'Cost', and 'Aging'. The main area has filters for 'Location' (Revolution Eye Care), 'Category' (Eyeglass Frames), and 'Date' (02/23/2010). Below these is an 'Advanced Search' section with 'Clear' and 'Search' buttons. The table below contains the following data:

Manufacturer	Collection	Model	Color	Eye	Bridge	Temple	Inv. #	UPC	SKU	Retail	Wholesale	Stock	Stk Rtl	Stk Whl	Stk Cost
Revolution Frames	Revolution Collection	R123	Blue	38.0	16.0	125.0 mm	1			\$117.00	\$46.95	3	\$351.00	\$140.85	\$119.85
Revolution Frames	Revolution Collection	Revolution 1		0.0	0.0	0.0 null	2			\$228.00	\$0.00	0	\$0.00	\$0.00	\$0.00
More Frames Inc	XYZ Collection	XYZ 123	Brown	52.0	19.0	130.0 mm	3			\$127.00	\$0.00	1	\$127.00	\$0.00	\$0.00
Revolution Frames	Revolution Collection	Revolution 1	Pewter	52.0	18.0	130.0 mm	96			\$228.00	\$0.00	1	\$228.00	\$0.00	\$0.00
TOTALS												\$	\$706.00	\$140.85	\$119.85

At the bottom of the table are buttons for 'Quantity History' and 'Receive Stock'.

1.1.6 Inventory Report based on Sales

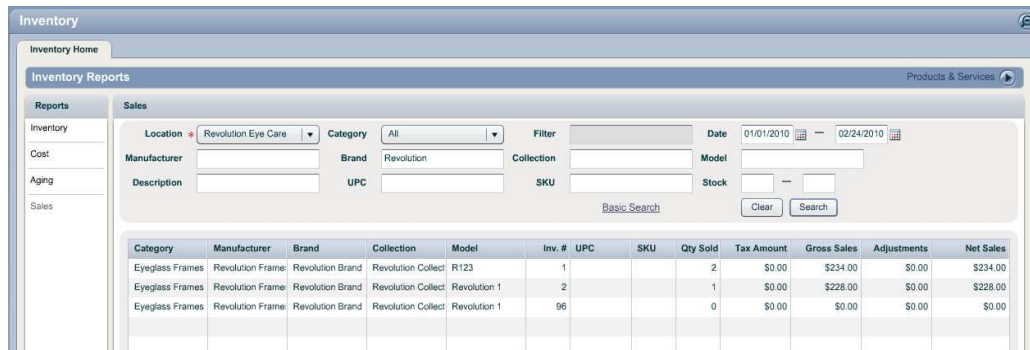
A request has been made to be able to view sales based on a specific brand or collection. To accommodate this request we have added a report in Inventory that can be run based on actual sales of physical inventory items.

To run an "Inventory Sales" report, go to Inventory; click "Inventory Reports" in the upper right corner; select "Sales" from the report list on the left.

As with all other Inventory Reports, the Sales report can be run based on product category, and can be filtered further using "Advanced Search". The Date field in the Sales report is slightly different than other Inventory reports in that you may enter a date range.

In addition to the standard columns displayed in all inventory report grids, the Sales report will display:

- Quantity Sold – this is the total number sold for that specific physical inventory item in the date range specified.
- Tax amount – this will show the total tax applied to a specific physical inventory item in the date range specified
- Gross Sales – this will show the gross sales total for that specific physical inventory item in the date range specified.
- Adjustments – this will display the total adjustments associated to that physical inventory item within the invoice. Currently adjustments are only triggered by fee schedules.
- Net Sales – this is the gross sales plus the adjustment for that specific physical inventory item in the date range specified.



Inventory Reports

Location: Revolution Eye Care | Category: All | Filter: | Date: 01/01/2010 - 02/24/2010

Manufacturer: | Brand: Revolution | Collection: | Model: | Stock: |

Description: | UPC: | SKU: |

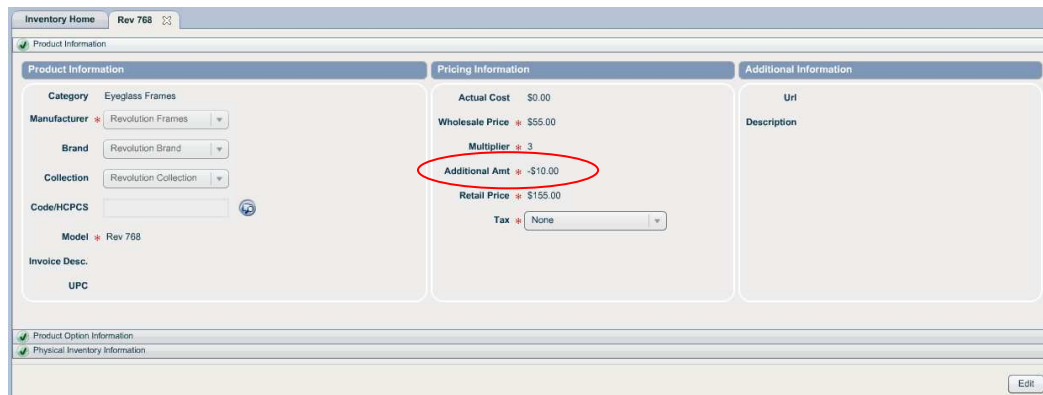
Basic Search | Clear | Search

Category	Manufacturer	Brand	Collection	Model	Inv. #	UPC	SKU	Qty Sold	Tax Amount	Gross Sales	Adjustments	Net Sales
Eyeglass Frames	Revolution Frame	Revolution Brand	Revolution Collect	R123	1			2	\$0.00	\$234.00	\$0.00	\$234.00
Eyeglass Frames	Revolution Frame	Revolution Brand	Revolution Collect	Revolution 1	2			1	\$0.00	\$228.00	\$0.00	\$228.00
Eyeglass Frames	Revolution Frame	Revolution Brand	Revolution Collect	Revolution 1	96			0	\$0.00	\$0.00	\$0.00	\$0.00

1.2 Inventory

1.2.1 Setting Retail

A negative number can now be used in the "Additional Amount" field causing a reduction in the retail price being calculated by the wholesale times the multiplier plus the additional amount:



Product Information

Category: Eyeglass Frames | Manufacturer: Revolution Frames | Brand: Revolution Brand | Collection: Revolution Collection | Code/HCPCS: | Model: Rev 768 | Invoice Desc: | UPC: |

Pricing Information

Actual Cost: \$0.00 | Wholesale Price: \$55.00 | Multiplier: 3 | **Additional Amt: -\$10.00** | Retail Price: \$155.00 | Tax: None

Additional Information

Uri: | Description: |

Product Option Information | Physical Inventory Information

Edit

1.3 Accounting

1.3.1 Printed Invoices (Receipts) and Statements

Additional information will now be included in the printed invoice and patient statement:

- Payment Information
- Provider Name
- Tax ID
- Diagnosis Codes
- Amount Due (patient statements only)
- Due Date (patient statements only)

Payment Information

Each individual payment will be displayed as a line item along with the line items for the charges from the invoice. Payment method, payment date, and reference number are included in the line item for the each payment:

Code	Description	Price	Qty	Tax	Ext Price	Adjs	Balance
V2100	Lab Supplied SV Sph pl - 4.00	\$ 36.00	2	\$ 0.00	\$ 72.00	\$ 0.00	\$ 72.00
V2020	More Frames Inc XYZ 123	\$ 127.00	1	\$ 0.00	\$ 127.00	\$ 0.00	\$ 127.00
PAYMENT	Credit Card - 02/23/2010	\$ 0.00	1	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 107.89
PAYMENT	Check - 02/01/2010 - 1234	\$ 0.00	1	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 100.00
Sub-Total							\$ 199.00
Tax							\$ 8.89
Total Amt							\$ 207.89
Total Adj							\$ 0.00
Payments							\$ 207.89
Balance							\$ 0.00

Provider Name and Tax ID

The name of the provider associated to the invoice is now displayed on the printed invoice.

Patient statements may contain multiple invoices that may each be associated to a different provider. For that reason, the provider name is displayed on the statement for each invoice included on that statement.

The tax id that will now be displayed on printed invoices is the tax id for the location associated to the invoice. If no tax id has been set up for that location or for the provider, no tax id will be displayed. To verify that the tax id has been set up for your location, go to Administration/General/Locations. Open the appropriate location file. The field for tax id is labeled "FEIN". When populating the tax id on the printed invoice or statement that is the first field checked. If no tax id is set up for the location, RevolutionEHR will then check the employee file for the provider associated to the invoice. If no tax id is set up for the location or the provider, no tax id will be displayed.

Patient statements may contain multiple invoices that may each be associated to different locations. For that reason, the tax id is displayed on the statement for each invoice included on that statement.

Printed Invoice:

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #cccccc;">Send payments to:</td> </tr> <tr> <td> Revolution Eye Care 765 Eastern Ave Cottage Grove, Wisconsin 53527 </td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #cccccc;">Bill To</td> </tr> <tr> <td> Leah Steenis 229 Main St. Cottage Grove, Wisconsin 53527 </td> </tr> </table>	Send payments to:	Revolution Eye Care 765 Eastern Ave Cottage Grove, Wisconsin 53527	Bill To	Leah Steenis 229 Main St. Cottage Grove, Wisconsin 53527	<div style="text-align: right; font-weight: bold; font-size: 1.2em;">Invoice</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Service Date</td> <td>Invoice Date</td> <td>Invoice #</td> </tr> <tr> <td>02/01/2010</td> <td>02/01/2010</td> <td>82</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Patient</td> <td>Patient #</td> </tr> <tr> <td>Leah Steenis</td> <td>50</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Provider</td> <td>Tax ID</td> </tr> <tr> <td>Steenis, Tracy OD</td> <td>942849609</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Price</th> <th>Qty</th> <th>Tax</th> <th>Ext Price</th> <th>Adjs</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>V2020</td> <td>More Frames Inc XYZ 123</td> <td>\$ 127.00</td> <td>1</td> <td>\$ 8.89</td> <td>\$ 135.89</td> <td>\$ 0.00</td> <td>\$ 135.89</td> </tr> <tr> <td>V2100</td> <td>Lab Supplied SV Sph pl - 4.00</td> <td>\$ 36.00</td> <td>2</td> <td>\$ 0.00</td> <td>\$ 72.00</td> <td>\$ 0.00</td> <td>\$ 72.00</td> </tr> <tr> <td>PAYMENT</td> <td>Credit Card - 02/23/2010</td> <td>\$ 0.00</td> <td>1</td> <td>\$ 0.00</td> <td>\$ 0.00</td> <td>\$ 0.00</td> <td>\$ -107.89</td> </tr> </tbody> </table>	Service Date	Invoice Date	Invoice #	02/01/2010	02/01/2010	82	Patient	Patient #	Leah Steenis	50	Provider	Tax ID	Steenis, Tracy OD	942849609	Code	Description	Price	Qty	Tax	Ext Price	Adjs	Balance	V2020	More Frames Inc XYZ 123	\$ 127.00	1	\$ 8.89	\$ 135.89	\$ 0.00	\$ 135.89	V2100	Lab Supplied SV Sph pl - 4.00	\$ 36.00	2	\$ 0.00	\$ 72.00	\$ 0.00	\$ 72.00	PAYMENT	Credit Card - 02/23/2010	\$ 0.00	1	\$ 0.00	\$ 0.00	\$ 0.00	\$ -107.89
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PAYMENT	Credit Card - 02/23/2010	\$ 0.00	1	\$ 0.00	\$ 0.00	\$ 0.00	\$ -107.89																																												

Patient Statement:

Cottage Grove, Wisconsin 53527	Due Date	03/27/2010
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Detach here and return top portion with payment

Date	Inv #	Patient	Description	Amount
02/25/2010	132	Leah Steenis		
			92004-52 - EYE EXAM NEW PATIENT, Reduced service	\$ 78.00
			PAYMENT - Check - 02/25/2010	-\$ 50.00
			TOTAL:	\$ 78.00
			PAYMENTS:	\$ 50.00
			BALANCE:	\$ 28.00
02/25/2010	133	Leah Steenis		
			V2520 - Vistakon Acuvue 2	\$ 160.00
			TOTAL:	\$ 160.00
			PAYMENTS:	\$ 0.00
			BALANCE:	\$ 160.00

Current	Over 30 days	Over 60 days	Over 90 days	AMOUNT DUE
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Diagnosis Codes

If a diagnosis code(s) has been associated to a line item on an invoice, that code(s) will now be displayed on the printed invoice and the patient statement. Because each line item on an invoice could be associated with different diagnosis codes, the codes displayed on the printed invoice and patient statement are listed directly under the line item:

Bill To
Leah Steenis 229 Main St. Cottage Grove, Wisconsin 53527

Leah Steenis	50
Provider	Tax ID
Miron, Ann OD	391675840

Code	Description	Price	Qty	Tax	Ext Price	Adjs	Balance
V2520	Vistakon Acuvue 2 Diagnoses: 367.1	\$ 40.00	4	\$ 0.00	\$ 160.00	\$ 0.00	\$ 160.00
Sub-Total							\$160.00
Tax							\$0.00
Total Amt							\$160.00
Total Adj							\$0.00

Amount Due and Due Date

The detachable top portion of the patient statement will now include the amount due on and the due date from that statement:

Send payments to:
Revolution Eye Care 765 Eastern Ave Cottage Grove, Wisconsin 53527

Statement

Amt.	Check #	Date	02/25/2010
For credit card payments, please provide the			
Name:			
Card Type:			
Card #:			
Exp Date:		Security	
Signature:			

Bill To:
Leah Steenis 229 Main St. Cottage Grove, Wisconsin 53527

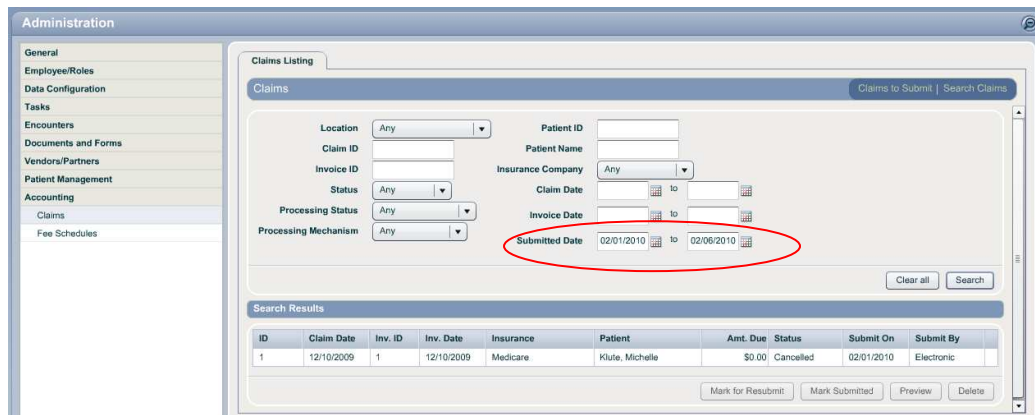
Patient	Patient #
Leah Steenis	50
Amount Due	\$ 28.00
Due Date	03/27/2010

Detach here and return top portion with payment

Date	Inv #	Patient	Description	Amount
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1.3.2 Search Claims

Date range fields for "Submitted On" have been added to the "Search Claims" screen in Administration/Accounting/Claims, allowing users to search for claims based on the date the claim was submitted:



ID	Claim Date	Inv. ID	Inv. Date	Insurance	Patient	Amt. Due	Status	Submit On	Submit By
1	12/10/2009	1	12/10/2009	Medicare	Klute, Michelle	\$0.00	Cancelled	02/01/2010	Electronic

1.3.3 Service Date

The service date on an invoice is triggered by the date of an encounter if that invoice is associated to an encounter. However, if an invoice is created outside of an encounter, the service date on the invoice simply defaults to the date the invoice was created. The invoice date can be edited, but the service date would remain unchanged.

As always, on an insurance invoice, the service date can be edited for the HCFA by double clicking on a line item and entering a new service date in the Invoice Item Details pop up.

However, we have received requests to match the service date to the invoice date, especially for purposes related to the printed patient receipts. An enhancement has been added that will update the service date on an invoice to match the invoice date, with the exception of invoices that are associated to encounters.

1.3.4 Accounting Reports

A new Accounting Report has been added to the "Sales" reports in the Accounting Module. This report will show sales by "Patient". All sales reports can already be drilled down to the patient level, but this report will start at the patient name and can be drilled down to the different types of sales for each patient individually:

Accounting

Accounting Home

Sales

All Patients

Patients	Total # Sold	Sub Total	Tax	Total \$ Sold	%
null, null	1	\$5.00	\$0.00	\$5.00	0%
Jones, Scorne	1	\$20.00	\$1.10	\$21.10	0%
Klute, Michelle	6	\$1.00	\$0.00	\$1.00	0%
Schneider, Hayden	2	\$234.00	\$0.00	\$234.00	5%
Steeris, Mason	37	\$1,197.79	\$0.00	\$1,197.79	24%
Steeris, Leah	27	\$1,035.20	\$8.89	\$1,044.09	21%
Klute, Austin	12	\$516.00	\$0.00	\$516.00	10%
Davidson, Harley	1	\$85.00	\$0.00	\$85.00	2%
Horras, Mary	0	\$0.00	\$0.00	\$0.00	0%
Horras, Mary	2	\$72.00	\$0.00	\$72.00	1%
Horras, Mary	6	\$573.00	\$0.00	\$573.00	11%

Report Criteria

Report Type: All Sales by Patient


Location: All

Date Range: Year-to-Date

Invoice Date: [Calendar Icon]

Clear Search

Up One



1.4 Scheduling

1.4.1 Booking an appointment using slots

When using a slot to book an appointment, the appointment type drop down has been enhanced and will now be displayed the appointments available in alphabetical order.

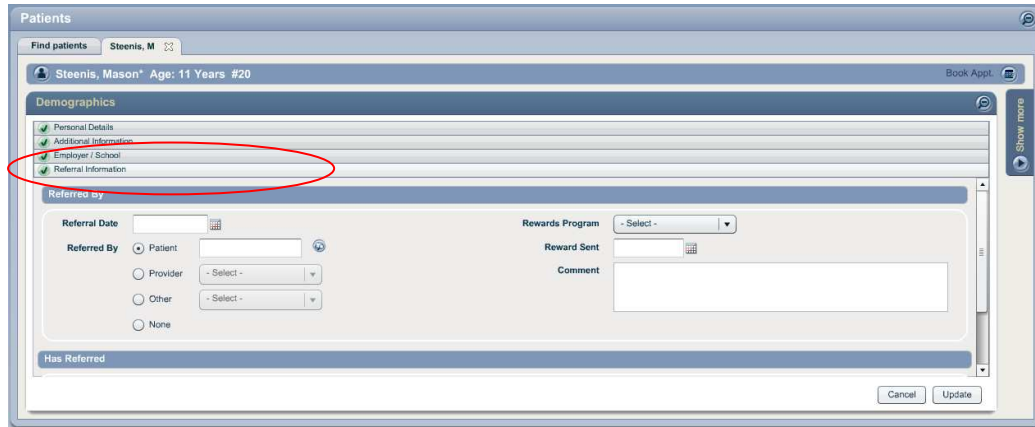
1.4.2 Office Closed Times

The default "start" and "end" times when adding a new "Office Closed" calendar item have been changed to 6:00 AM to 10:00 PM. This enhancement was made to simplify adding and office closed item. The intent is to cover most open office hours so that user will only need to change start and end times when the office is closed for only a partial day.

1.5 Referrals/Reward Programs

The tracking of referrals has been enhanced to include the ability to record other referral sources in addition to another patient. Additionally, the user can set the referral rewards program associated with the referral.

This ability has been added to the "Demographics" component within the patient's file. With Demographics open, click on the "Referrals" slider in the bottom left:



The bottom grid in this slider titled "Has Referred" will still contain the list of other patients who have been referred to your practice by the patient whose file is currently being viewed.

"Referred By" is the new addition to this slider. The "Referred By" section is intended to be used to indicate how the patient was referred to your practice, and whether a "Rewards Program" will be given to the referring patient or provider.

Use the "Referral Date" field in the "Referred By" section to indicate the date the new patient was referred. A "Referral Date" is required.

Select the appropriate radio button to indicate what type of referral source you would like to select from:

- Patient – This will allow the user to select another patient from the database as the referral source for the patient currently being viewed. This option was previously located in the "Additional Information" slider.
- Provider – This will allow the user to select an "external provider" from the existing external provider list available for your practice.
- Other – This will allow the user to select from a configurable list of outside referral sources.

"Rewards Programs" can be associated to "Patient" or "Provider". When indicating that the referral source was a patient or provider, use the "Rewards Program" drop down to select the type of rewards program given if applicable for the patient or provider giving the referral:

Martinez, Rachel* Age: 12 Years #79 Book Appt.

Demographics

- Personal Details
- Additional Information
- Employer / School
- Referral Information

Referred By

Referral Date:

Referred By: ☒ Patient ☐ Provider ☐ Other ☐ None

Rewards Program:

Reward Sent:

Comment:

Has Referred

Patient	Referral Date	Rewards Program	Reward Sent	Comment

A date may also be entered to show the date the Rewards Program was issued. If the program has not been issued, you may come back at another time to fill in this date.

IMPORTANT NOTE: Reports are still being built in reference to the new Referrals feature. In a subsequent release we will add the ability for users to run reports on this information. For example, one option would be to run a report for all "Rewards Programs" outstanding with no "Reward Sent" date. This would allow the user to configure a list of patients and/or providers needing some type of reward sent/issued.

When a patient is added as the referral source, the information regarding the new patient being referred in and the rewards program will appear in the "Has Referred" grid for the referring patient:

Martinez, Kim* Age: 50 Years #78 Book Appt.

Demographics

- Personal Details
- Additional Information
- Employer / School
- Referral Information

Referred By

Referral Date:

Referred By: ☐ Patient ☐ Provider ☐ Other ☒ None

Rewards Program:

Reward Sent:

Comment:

Has Referred

Patient	Referral Date	Rewards Program	Reward Sent	Comment
Martinez, Rachel	02/26/2010	Starbucks gift card		

To configure the options that will appear in the "Other" drop down, go to Administration/Data Configuration/Referrals/Referral Sources; Click "Add Item" to create a new referral source:

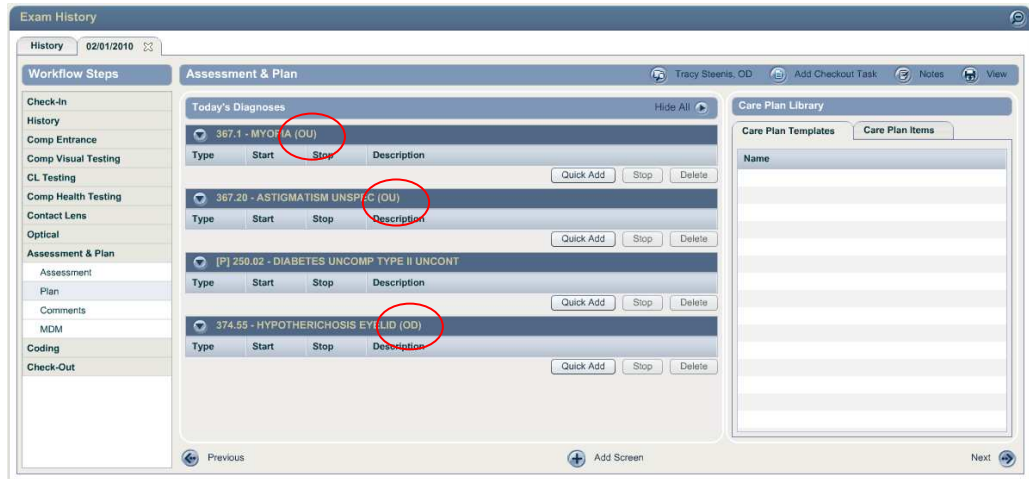
To configure the options that will appear in the "Rewards Program" drop down, go to Administration/Data Configuration/Referrals/Referral Rewards Programs; Click "Add Item" to create a new rewards program:

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1.6 EHR

1.6.1 Plan Screen

The plan screen has been enhanced to display the appropriate indicator (OD, OS, or OU) for each diagnosis if applicable:



2. Fixes

2.1 Inventory

2.1.1 Physical Inventory Information

- When physical inventory items were added for contact lens products, the color was not being displayed in the color column of the Physical Inventory Information slider. This has been fixed.
- When a new product was added to the Product catalog in Inventory, and a physical inventory item is added for that new product, the Retail price from the product was not automatically populating the retail price for the physical inventory item. This has been fixed.

2.1.2 Inventory Reports

A previous issue existed that would occasionally prevent the user from being able to view their inventory report until the browser was refreshed. This was related to logging out after viewing Inventory reports and has been fixed.

2.2 Scheduling

2.2.1 Employee Hours/Log in

Employee hours can be configured in the Scheduling Module for any employee. One feature of the employee hours is to designate which location an employee is logged into based on the location where they have employee hours configured.

However, an issue existed that allowed a user to create employee hours in a location that the employee, does not have "access" to. If the employee logged in during those hours they would be logged into a location for which they should not have access. This issue has been resolved.

2.3 Documents and Images

2.3.1 Viewing files

A problem existed that would prevent the user from viewing a file if more than one file existed with the same name, and that file was edited or created using the drawing tool. This has been fixed.

2.4 Patient Module

2.4.1 Providers

- A bug existed in the "Providers" component within the patient's file that would display the wrong provider name in the drop down when an existing external provider file was opened. This has been fixed.
- Another issue occurred when updating or adding new provider ids to an existing external provider from the "Providers" component within the patient file. This has also been resolved.

2.5 EHR

2.3.2 Encounter Print Out

The encounter print out will now only print out those medications that were active during the date of that encounter. If the start date for the medication is after the encounter date, or the expiration date for the medication is before the encounter date, the medication will not be included on the encounter print out.

2.6 Performance

2.3.3 Reports

Some additional optimization changes have been made to Sales reports and Search claims in an effort to minimize the demand on the database when large reports are being returned.