



RevolutionEHR

6 Boulder Creek Circle
Madison, WI 53717

Phone: 877-370-6906

www.revolutionehr.com

customersupport@revolutionehr.com

RevolutionEHR Release 4.4.22

Release Notes

04/08/2010

Overview

The primary focus of this release is the addition of new Scheduling Reports. However, many small fixes were also included in this release.

Table of Contents

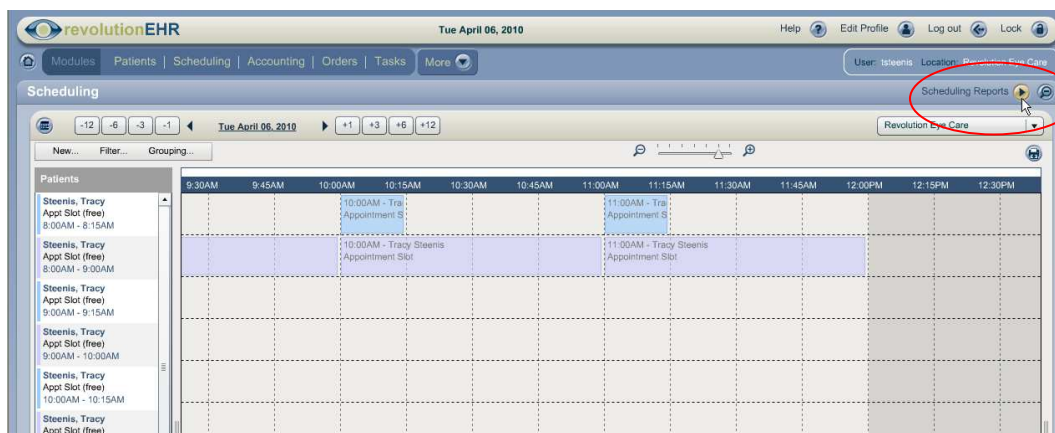
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1. Enhancements

1.1 Scheduling

A new reporting section has been added to the Scheduling module. There are two new available report search screens. One report allows the user to filter and search on appointments, the second allows the user to filter and search on encounters.

To run Scheduling reports click on the "Scheduling Reports" toggle button in the upper right corner of the Scheduling Module



To return to the standard Scheduling view, click on the "Scheduling" toggle in the upper right corner of the Scheduling Reports



1.1.1 Appointment Report

The new Appointment Report will allow the user to select any combination of available criteria to produce the desired report results.

The available criteria includes:

- Location
- Provider
- Employee
- Role
- Patient
- Template (appointment type)
- Appointment Date Range
- Confirmation Date Range
- Status (appointment status)
- Confirmed (confirmation status)
- Insurance Verified (verification status)
- Patient Status (new vs. established)

Important Note: The status of “new” for a patient is only applicable before the patient actually comes into the office for their visit. Once a new patient encounter is marked as “completed” the status of that patient as it relates to the appointment changes to “established” as that patient status is directly related to the status within the patient’s demographics component.

However, the status of “new” for that patient is saved as it relates directly to the encounter. To run a list of encounters for new patients, use the “Encounter Reports”

The “Appointment Details” can be displayed and used directly from the Appointment Report. Select the appropriate appointment from the search results, and click “Show Details” in the bottom right corner, or simply double click on the line for that appointment:

Scheduling Reports

Reports: Appointments, Encounters

Appointments

Location: All Locations, Patient: All Patients, Status: Any, Confirmed: Either, Ins. Verified: Any, Patient Status: Any

Provider: All Providers, Template: All Templates, Appointment Date: , Confirmation Date: , Clear, Search

Employee: All Employees, Role: All Roles

| ID | Date | Patient | Phone # | Location | Provider | Employee | Role | Template | Status |
|----|---------------------|-------------------|---------------|---------------------|----------------|----------------|----------------------|-------------------------------|--------|
| 64 | 12/05/2008 9:00 AM | Steenis, Leah | (000) 222-777 | Revolution Eye Care | Guyer, Frank | Guyer, Heidi | Office Administrator | Comprehensive Encounter No Cl | |
| 65 | 12/05/2008 9:00 AM | Steenis, Mason | (777) 444-999 | Revolution Eye Care | Guyer, Frank | Guyer, Heidi | Nurse | Comprehensive Encounter No Cl | |
| 1 | 11/23/2009 6:00 PM | Rupley, Helen* | (920) 555-123 | Jims QA Practice | Miron, Ann | | | Comprehensive Encounter | |
| 2 | 12/18/2009 10:00 AM | Schneider, Hayden | (111) 222-123 | Jims QA Practice | Schneider, Jim | | | Comprehensive Encounter | |
| 3 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | |
| 4 | 01/18/2010 9:00 AM | Steenis, Leah | (000) 222-777 | Jims QA Practice | Steenis, Tracy | | | Contact Lens Evaluation | |
| 6 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-999 | Jims QA Practice | Steenis, Tracy | | | Anterior Segment Evaluation | |
| 7 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | |
| 8 | 01/18/2010 9:00 AM | Steenis, Leah | (000) 222-777 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | |
| 10 | 01/18/2010 9:00 AM | Klute, Austin* | (999) 888-444 | Jims QA Practice | Steenis, Tracy | | | Cataract Post Op Exam | |
| 5 | 01/18/2010 9:30 AM | Steenis, Leah | (000) 222-777 | Jims QA Practice | Steenis, Tracy | | | Contact Lens Evaluation | |
| 9 | 01/18/2010 10:00 AM | Steenis, Leah | (000) 222-777 | Jims QA Practice | Steenis, Tracy | Horras, Mary | Nurse | Comprehensive Encounter | |
| 11 | 01/18/2010 10:30 AM | Klute, Austin* | (999) 888-444 | Jims QA Practice | Steenis, Tracy | Horras, Mary | Nurse | Cataract Post Op Exam | |
| 14 | 01/21/2010 1:00 PM | Davidson, Harley* | (123) 456-789 | Jims QA Practice | Tester, Tester | Horras, Mary | Optician | Comprehensive Encounter No Cl | |
| 15 | 01/21/2010 7:30 PM | Klute, Whitney* | (666) 555-999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | |
| 17 | 01/21/2010 7:30 PM | Klute, Whitney* | (666) 555-999 | Jims QA Practice | Steenis, Tracy | Guyer, Heidi | Nurse | Comprehensive Encounter | |
| 16 | 01/21/2010 8:00 PM | Klute, Michelle | (666) 555-999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter No Cl | |
| 18 | 01/21/2010 8:30 PM | Klute, Michelle | (666) 555-999 | Revolution Eye Care | Steenis, Tracy | | | Comprehensive Encounter | |
| 19 | 01/21/2010 9:00 PM | Steenis, Mason | (777) 444-999 | Revolution Eye Care | Steenis, Tracy | Schneider, Jim | | Comprehensive Encounter | |

Select All, Clear All, Print Selected Summaries, Show Details

This action will open the "Appointment Details" slider to the right:

Scheduling Reports

Reports: Appointments, Encounters

Appointments

Location: All Locations, Patient: All Patients, Status: Any, Confirmed: Either, Ins. Verified: Any, Patient Status: Any

Provider: All Providers, Template: All Templates, Appointment Date: , Confirmation Date: , Clear, Search

Employee: All Employees, Role: All Roles

| ID | Date | Patient | Phone # | Location | Provider | Employee | Role | Template | Status |
|----|--------------|-----------------|------------|----------------|----------------|--------------|------------|----------------------|--------|
| 64 | 12/05/2008 9 | Steenis, Leah | (000) 222- | Revolution Eye | Guyer, Frank | Guyer, Heidi | Office Adm | Comprehensive Encoo | |
| 65 | 12/05/2008 9 | Steenis, Mason | (777) 444- | Revolution Eye | Guyer, Frank | Guyer, Heidi | Nurse | Comprehensive Encoo | |
| 1 | 11/23/2009 6 | Rupley, Helen* | (920) 555- | Jims QA Practi | Miron, Ann | | | Comprehensive Encoo | |
| 2 | 12/18/2009 1 | Schneider, Hay | (111) 222- | Jims QA Practi | Schneider, Jim | | | Comprehensive Encoo | |
| 3 | 01/18/2010 9 | Steenis, Mason | (777) 444- | Jims QA Practi | Steenis, Tracy | | | Comprehensive Encoo | |
| 4 | 01/18/2010 9 | Steenis, Leah | (000) 222- | Jims QA Practi | Steenis, Tracy | | | Contact Lens Evaluat | |
| 6 | 01/18/2010 9 | Steenis, Mason | (777) 444- | Jims QA Practi | Steenis, Tracy | | | Anterior Segment Eva | |
| 7 | 01/18/2010 9 | Steenis, Mason | (777) 444- | Jims QA Practi | Steenis, Tracy | | | Comprehensive Encoo | |
| 8 | 01/18/2010 9 | Steenis, Leah | (000) 222- | Jims QA Practi | Steenis, Tracy | | | Comprehensive Encoo | |
| 10 | 01/18/2010 9 | Klute, Austin* | (999) 888- | Jims QA Practi | Steenis, Tracy | | | Cataract Post Op Exa | |
| 5 | 01/18/2010 9 | Steenis, Leah | (000) 222- | Jims QA Practi | Steenis, Tracy | | | Contact Lens Evaluat | |
| 9 | 01/18/2010 1 | Steenis, Leah | (000) 222- | Jims QA Practi | Steenis, Tracy | Horras, Mary | Nurse | Comprehensive Encoo | |
| 11 | 01/18/2010 1 | Klute, Austin* | (999) 888- | Jims QA Practi | Steenis, Tracy | Horras, Mary | Nurse | Cataract Post Op Exa | |
| 14 | 01/21/2010 1 | Davidson, Harl | (123) 456- | Jims QA Practi | Tester, Tester | Horras, Mary | Optician | Comprehensive Encoo | |
| 15 | 01/21/2010 7 | Klute, Whitney | (666) 555- | Jims QA Practi | Steenis, Tracy | | | Comprehensive Encoo | |
| 17 | 01/21/2010 7 | Klute, Whitney | (666) 555- | Jims QA Practi | Steenis, Tracy | Guyer, Heidi | Nurse | Comprehensive Encoo | |
| 16 | 01/21/2010 8 | Klute, Michelle | (666) 555- | Jims QA Practi | Steenis, Tracy | | | Comprehensive Encoo | |
| 18 | 01/21/2010 8 | Klute, Michelle | (666) 555- | Revolution Eye | Steenis, Tracy | | | Comprehensive Encoo | |

Select All, Clear All, Print Selected Summaries, Show Details

Appointment Details

Appointment: Appointment

Patient: Steenis, Leah
Age: 17 Years
Type: Contact Lens Evaluation
Category: Monday, Jan 18, 2010
Date: Monday, Jan 18, 2010
Start time: 9:00AM
Provider: Tracy Steenis
Status: Rescheduled
Confirmation: Unconfirmed
Workflow step: Unconfirmed
End time: 9:55AM / 9:55AM
Created on: 01/18/2010

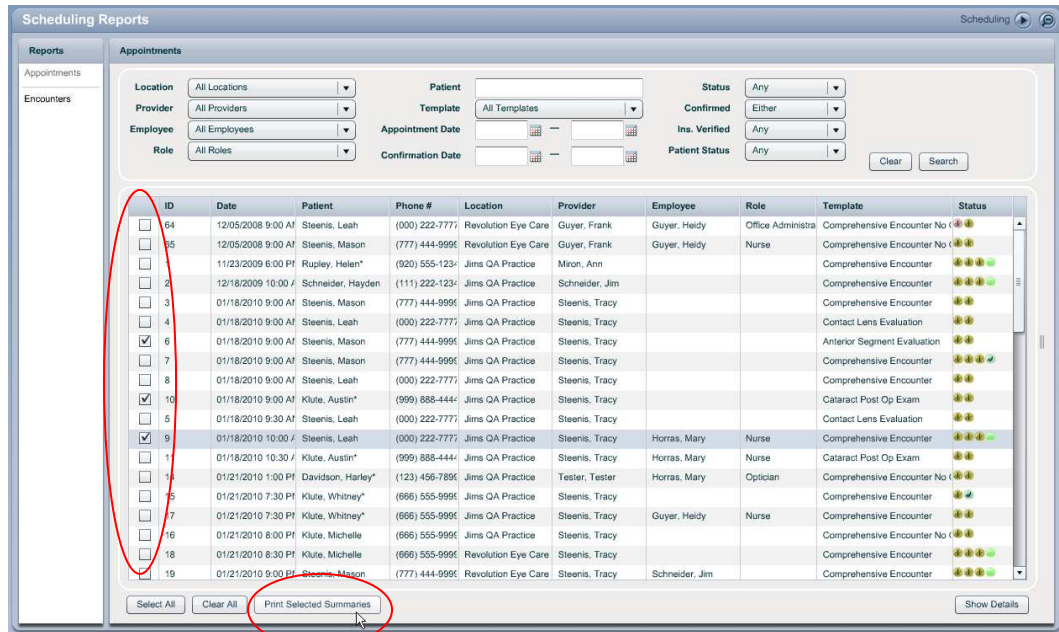
Patient Insurance

Confirm, Reschedule, Cancel, NoShow, Print, Email, Open, Start

You may use the appointment details in the Appointment Report just as you would within the calendar view.

Single clicking on a different appointment in the list will automatically change the Appointment Details being display to those for the new appointment selected.

The checkboxes to the left of each appointment listed in the search results allows the user to select multiple appointments; you may then click the "Print Selected Summaries" to print a batch of appointment summary documents for the selected appointments:



Scheduling Reports

Reports: Appointments, Encounters

Location: All Locations, Patient: All Patients, Status: Any, Confirmed: Either, Ins. Verified: Any, Patient Status: Any

Provider: All Providers, Template: All Templates, Appointment Date: [Calendar], Confirmation Date: [Calendar]

| ID | Date | Patient | Phone # | Location | Provider | Employee | Role | Template | Status |
|--|--------------------|-------------------|----------------|---------------------|----------------|----------------|-------------------|-----------------------------|--------|
| <input type="checkbox"/> 64 | 12/05/2008 9:00 AM | Steenis, Leah | (000) 222-7777 | Revolution Eye Care | Guyer, Frank | Guyer, Heidi | Office Administra | Comprehensive Encounter No | Yellow |
| <input type="checkbox"/> 65 | 12/05/2008 9:00 AM | Steenis, Mason | (777) 444-9999 | Revolution Eye Care | Guyer, Frank | Guyer, Heidi | Nurse | Comprehensive Encounter No | Yellow |
| <input type="checkbox"/> 1 | 11/23/2009 6:00 PM | Rupley, Helen* | (920) 555-1234 | Jims QA Practice | Mron, Ann | | | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 2 | 12/18/2009 10:00 / | Schneider, Hayden | (111) 222-1234 | Jims QA Practice | Schneider, Jim | | | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 3 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-9999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 4 | 01/18/2010 9:00 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | | | Contact Lens Evaluation | Yellow |
| <input checked="" type="checkbox"/> 6 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-9999 | Jims QA Practice | Steenis, Tracy | | | Anterior Segment Evaluation | Yellow |
| <input type="checkbox"/> 7 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-9999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 8 | 01/18/2010 9:00 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | Yellow |
| <input checked="" type="checkbox"/> 10 | 01/18/2010 9:00 AM | Klute, Austin* | (999) 888-4444 | Jims QA Practice | Steenis, Tracy | | | Cataract Post Op Exam | Yellow |
| <input type="checkbox"/> 5 | 01/18/2010 9:30 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | | | Contact Lens Evaluation | Yellow |
| <input checked="" type="checkbox"/> 9 | 01/18/2010 10:00 / | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | Horras, Mary | Nurse | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 17 | 01/18/2010 10:30 / | Klute, Austin* | (999) 888-4444 | Jims QA Practice | Steenis, Tracy | Horras, Mary | Nurse | Cataract Post Op Exam | Yellow |
| <input type="checkbox"/> 14 | 01/21/2010 1:00 PM | Davidson, Harley* | (123) 456-7890 | Jims QA Practice | Tester, Tester | Horras, Mary | Optician | Comprehensive Encounter No | Yellow |
| <input type="checkbox"/> 15 | 01/21/2010 7:30 PM | Klute, Whitney* | (666) 555-9999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 17 | 01/21/2010 7:30 PM | Klute, Whitney* | (666) 555-9999 | Jims QA Practice | Steenis, Tracy | Guyer, Heidi | Nurse | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 16 | 01/21/2010 8:00 PM | Klute, Michelle | (666) 555-9999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encounter No | Yellow |
| <input type="checkbox"/> 18 | 01/21/2010 8:30 PM | Klute, Michelle | (666) 555-9999 | Revolution Eye Care | Steenis, Tracy | | | Comprehensive Encounter | Yellow |
| <input type="checkbox"/> 19 | 01/21/2010 9:00 PM | Steenis, Mason | (777) 444-9999 | Revolution Eye Care | Steenis, Tracy | Schneider, Jim | | Comprehensive Encounter | Yellow |

Select All, Clear All, **Print Selected Summaries**, Show Details

1.1.2 Encounter Reports

The new Encounter Report will allow the user to select any combination of available criteria to produce the desired report results.

To access Encounter Reports, click on "Encounters" in the report list on the far left.

Scheduling Reports

Reports

Appointments

Encounters

Location: All Locations
 Provider: All Providers
 Employee: All Employees
 Role: All Roles

Patient:
 Template: All Templates
 Appointment Date: --
 Confirmation Date: --

Status: Any
 Confirmed: Either
 Ins. Verified: Any
 Patient Status: Any

Clear

| ID | Date | Patient | Phone # | Location | Provider | Employee | Role | Template |
|--|---------------------|-------------------|----------------|---------------------|----------------|--------------|-------------------|-----------------------|
| <input type="checkbox"/> 64 | 12/05/2008 9:00 AM | Steenis, Leah | (000) 222-7777 | Revolution Eye Care | Guyer, Frank | Guyer, Heidi | Office Administra | Comprehensive Encoi |
| <input type="checkbox"/> 65 | 12/05/2008 9:00 AM | Steenis, Mason | (777) 444-9999 | Revolution Eye Care | Guyer, Frank | Guyer, Heidi | Nurse | Comprehensive Encoi |
| <input type="checkbox"/> 1 | 11/23/2009 6:00 PM | Rupley, Helen* | (920) 555-1234 | Jims QA Practice | Miron, Ann | | | Comprehensive Encoi |
| <input type="checkbox"/> 2 | 12/18/2009 10:00 AM | Schneider, Hayden | (111) 222-1234 | Jims QA Practice | Schneider, Jim | | | Comprehensive Encoi |
| <input type="checkbox"/> 3 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-9999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encoi |
| <input type="checkbox"/> 4 | 01/18/2010 9:00 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | | | Contact Lens Evaluati |
| <input checked="" type="checkbox"/> 6 | 01/18/2010 9:00 AM | Steenis, Leah | (777) 444-9999 | Jims QA Practice | Steenis, Tracy | | | Anterior Segment Eva |
| <input type="checkbox"/> 7 | 01/18/2010 9:00 AM | Steenis, Mason | (777) 444-9999 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encoi |
| <input type="checkbox"/> 8 | 01/18/2010 9:00 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | | | Comprehensive Encoi |
| <input checked="" type="checkbox"/> 10 | 01/18/2010 9:00 AM | Klute, Austin* | (999) 888-4444 | Jims QA Practice | Steenis, Tracy | | | Cataract Post Op Exa |
| <input type="checkbox"/> 5 | 01/18/2010 9:30 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | | | Contact Lens Evaluati |
| <input checked="" type="checkbox"/> 9 | 01/18/2010 10:00 AM | Steenis, Leah | (000) 222-7777 | Jims QA Practice | Steenis, Tracy | Horras, Mary | Nurse | Comprehensive Encoi |
| <input type="checkbox"/> 11 | 01/18/2010 10:30 AM | Klute, Austin* | (999) 888-4444 | Jims QA Practice | Steenis, Tracy | Horras, Mary | Nurse | Cataract Post Op Exa |

The available criteria includes:

- Location
- Provider
- Employee
- Patient
- Template (encounter type)
- Encounter date range
- Approval date range (date the encounter was signed)
- Status
- Approval
- Patient Status (new vs. established)

The underlined encounter date located in the first column of the search results is a hyperlink to that encounter. Clicking on the date will take you directly to that encounter within the patient's file.

Scheduling Reports Scheduling

Reports
Appointments
Encounters

Encounters

Location: All Locations
Provider: All Providers
Employee: All Employees

Patient:
Template: All Templates
Encounter Date: -
Approval Date: -

Status: Any
Approval: Either
Patient Status: Any

| ID | Date | Patient | Location | Provider | Employee | Template | Status | Approval |
|----|------------|-------------------|---------------------|----------------|--------------|-------------------------|-------------|--------------|
| 76 | 04/06/2010 | Schneider, Hayden | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 69 | 03/23/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 61 | 03/16/2010 | Steenis, Leah | Jims QA Practice | Schneider, Jim | | Comprehensive Encounter | In Progress | Not Approved |
| 58 | 03/11/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 57 | 03/10/2010 | Horras, Mitch* | Jims QA Practice | Horras, Mary | | Comprehensive Encounter | In Progress | Not Approved |
| 53 | 03/08/2010 | Steenis, Mason | Revolution Eye Care | Schneider, Jim | Horras, Mary | Comprehensive Encounter | In Progress | Not Approved |
| 51 | 03/08/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 50 | 03/08/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 48 | 03/08/2010 | Steenis, Mason | Revolution Eye Care | Horras, Mary | | Comprehensive Encounter | Complete | Approved |
| 41 | 02/25/2010 | Steenis, Mason* | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Approved |
| 39 | 02/24/2010 | Steenis, Leah | Jims QA Practice | Steenis, Tracy | | Cataract Post Op Exam | In Progress | Not Approved |
| 38 | 02/24/2010 | Steenis, Leah | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 37 | 02/22/2010 | Horras, Mary* | Revolution Eye Care | Jens, Scott | Jens, Scott | Comprehensive Encounter | Complete | Not Approved |
| 35 | 02/19/2010 | Horras, Mary* | Jims QA Practice | Jens, Scott | Horras, Mary | Comprehensive Encounter | Complete | Not Approved |
| 34 | 02/19/2010 | Horras, Mary* | Jims QA Practice | Jens, Scott | Horras, Mary | Contact Lens Evaluation | Cancelled | Not Approved |
| 33 | 02/15/2010 | Davidson, Harley* | Jims QA Practice | Jens, Scott | | Comprehensive Encounter | In Progress | Not Approved |

A specific encounter may be selected from the list by clicking on the line for that encounter to highlight. Once selected you may use the "Print Encounter Summary" to open the print document for that encounter. This is the same document produced when clicking "view" from within that encounter.

Scheduling Reports Scheduling

Reports
Appointments
Encounters

Encounters

Location: All Locations
Provider: All Providers
Employee: All Employees

Patient:
Template: All Templates
Encounter Date: -
Approval Date: -

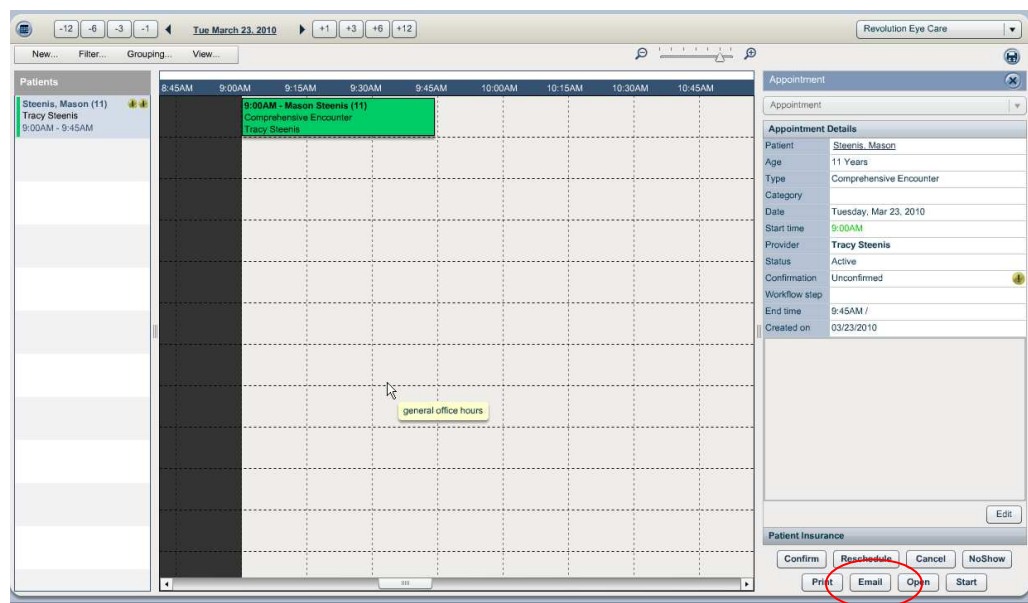
Status: Any
Approval: Either
Patient Status: Any

| ID | Date | Patient | Location | Provider | Employee | Template | Status | Approval |
|----|------------|-------------------|---------------------|----------------|--------------|-------------------------|-------------|--------------|
| 76 | 04/06/2010 | Schneider, Hayden | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 69 | 03/23/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 61 | 03/16/2010 | Steenis, Leah | Jims QA Practice | Schneider, Jim | | Comprehensive Encounter | In Progress | Not Approved |
| 58 | 03/11/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 57 | 03/10/2010 | Horras, Mitch* | Jims QA Practice | Horras, Mary | | Comprehensive Encounter | In Progress | Not Approved |
| 53 | 03/08/2010 | Steenis, Mason | Revolution Eye Care | Schneider, Jim | Horras, Mary | Comprehensive Encounter | In Progress | Not Approved |
| 51 | 03/08/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 50 | 03/08/2010 | Steenis, Mason | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 48 | 03/08/2010 | Steenis, Mason | Revolution Eye Care | Horras, Mary | | Comprehensive Encounter | Complete | Approved |
| 41 | 02/25/2010 | Steenis, Mason* | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Approved |
| 39 | 02/24/2010 | Steenis, Leah | Jims QA Practice | Steenis, Tracy | | Cataract Post Op Exam | In Progress | Not Approved |
| 38 | 02/24/2010 | Steenis, Leah | Jims QA Practice | Steenis, Tracy | | Comprehensive Encounter | In Progress | Not Approved |
| 37 | 02/22/2010 | Horras, Mary* | Revolution Eye Care | Jens, Scott | Jens, Scott | Comprehensive Encounter | Complete | Not Approved |
| 35 | 02/19/2010 | Horras, Mary* | Jims QA Practice | Jens, Scott | Horras, Mary | Comprehensive Encounter | Complete | Not Approved |
| 34 | 02/19/2010 | Horras, Mary* | Jims QA Practice | Jens, Scott | Horras, Mary | Contact Lens Evaluation | Cancelled | Not Approved |
| 33 | 02/15/2010 | Davidson, Harley* | Jims QA Practice | Jens, Scott | | Comprehensive Encounter | In Progress | Not Approved |

1.1.3 Email appointment summary

A new button has been added to the appointment details slider that will allow the user to email an appointment summary to the patient. Previously, it was necessary to use the "open" button to access the appointment file from the patient's file/exam history component to be able to email the summary.

If the patient does not have an email address entered in demographics, this button will be inactive.

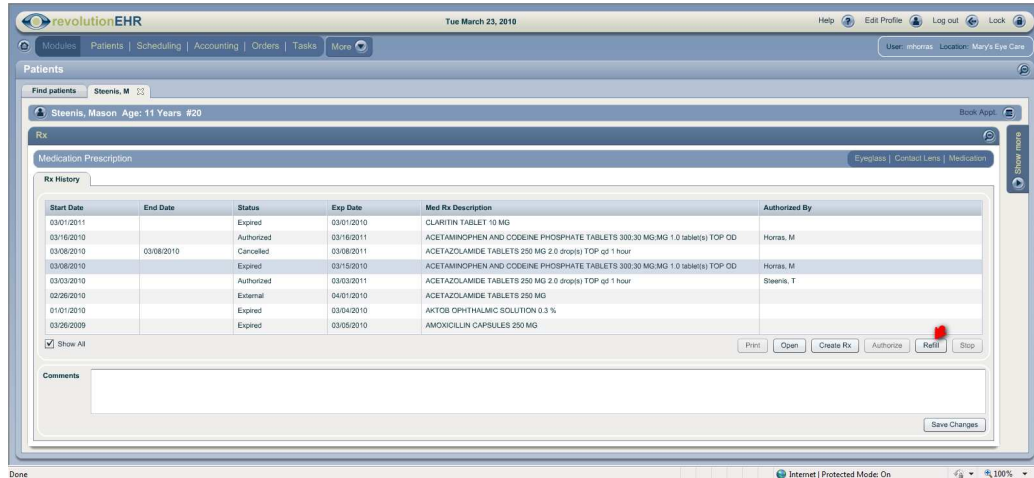


1.2 Patient Module

1.2.1 Med Rx

The ability to refill expired medication prescriptions is now available.

- To display the expired prescription check the "Show All" box in the bottom left corner of the Medication Prescription list
- Single click on the appropriate expired rx to highlight the prescription
- Click "Refill"



Medication Prescription

| Start Date | End Date | Status | Exp Date | Med Rx Description | Authorized By |
|------------|------------|------------|------------|---|---------------|
| 03/01/2011 | | Expired | 03/01/2010 | CLARITHIN TABLET 10 MG | |
| 03/16/2010 | | Authorized | 03/16/2011 | ACETAMINOPHEN AND CODEINE PHOSPHATE TABLETS 300/30 MG/MG 1.0 tablet(s) TOP OD | Hornas, M |
| 03/08/2010 | 03/08/2010 | Cancelled | 03/08/2011 | ACETAZOLAMIDE TABLETS 250 MG 2.0 drop(s) TOP qd 1 hour | |
| 03/08/2010 | | Expired | 03/15/2010 | ACETAMINOPHEN AND CODEINE PHOSPHATE TABLETS 300/30 MG/MG 1.0 tablet(s) TOP OD | Hornas, M |
| 03/03/2010 | | Authorized | 03/03/2011 | ACETAZOLAMIDE TABLETS 250 MG 2.0 drop(s) TOP qd 1 hour | Steenis, T |
| 02/26/2010 | | External | 04/01/2010 | ACETAZOLAMIDE TABLETS 250 MG | |
| 01/01/2010 | | Expired | 03/04/2010 | AKTOS OPHTHALMIC SOLUTION 0.3 % | |
| 03/26/2009 | | Expired | 03/05/2010 | AMOXICILLIN CAPSULES 250 MG | |

Buttons: Print, Open, Create Rx, Authorize, **Refill**, Stop

Comments: [Text Area]

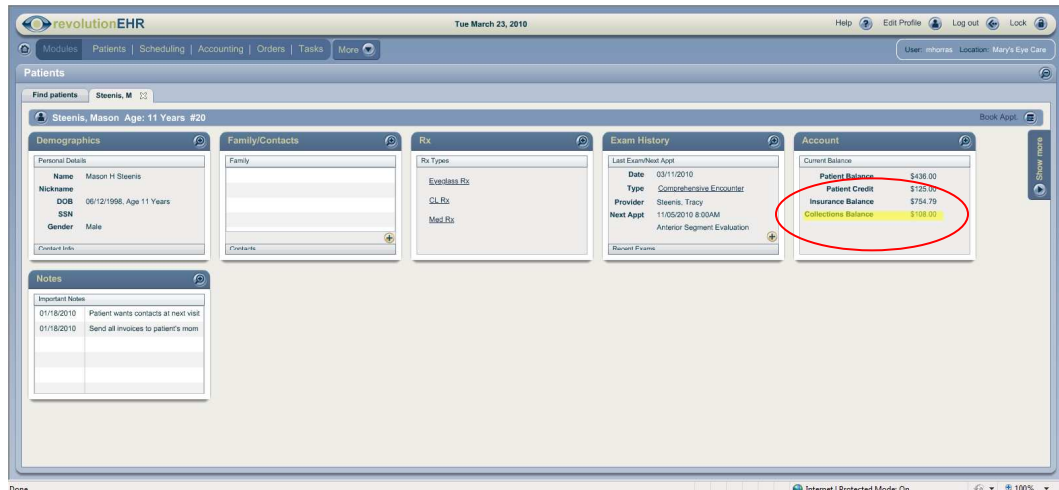
Save Changes

- Enter the number of refills
- Enter the expiration date
- Click update.

The new Rx is automatically authorized. For this reason, the "Refill" button will only be active when logged into RevolutionEHR as a provider.

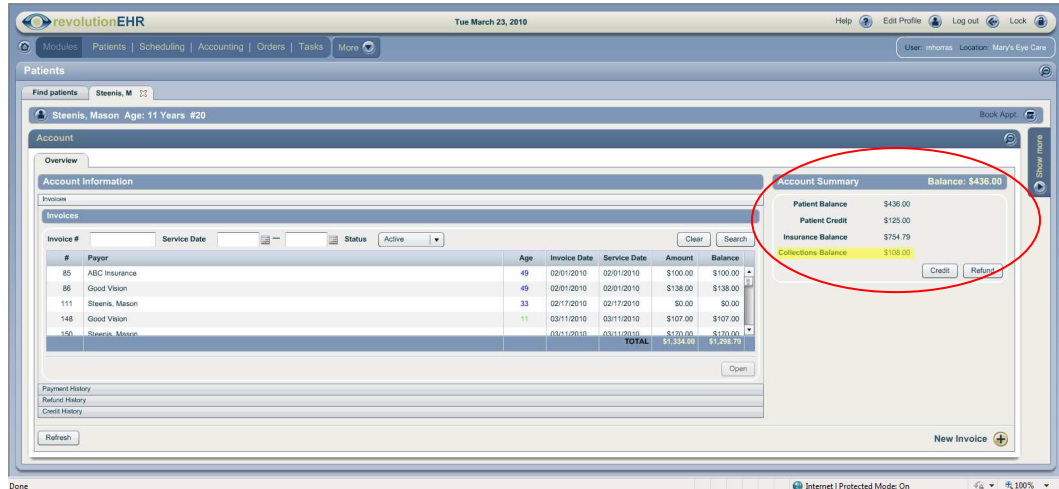
1.2.2 Account

Collections Balance is now displayed in the Account Pod within the Patient Dashboard, as well as the Account Summary area within the Account component. This balance allows the user view the outstanding balance if a transfer has been made to collections.



Account Pod:

| | |
|----------------------------|-----------------|
| Current Balance | \$108.00 |
| Patient Credit | \$754.79 |
| Insurance Balance | \$754.79 |
| Collections Balance | \$108.00 |



Account Summary Balance: \$436.00

| | |
|---------------------|----------|
| Patient Balance | \$436.00 |
| Patient Credit | \$125.00 |
| Insurance Balance | \$754.79 |
| Collections Balance | \$108.00 |

Buttons: Credit, Refund

| Invoice # | Payer | Age | Invoice Date | Service Date | Amount | Balance |
|--------------|---------------|-----|--------------|--------------|------------|------------|
| 85 | ABC Insurance | 49 | 02/01/2010 | 02/01/2010 | \$100.00 | \$100.00 |
| 86 | Good Vision | 49 | 02/01/2010 | 02/01/2010 | \$138.00 | \$138.00 |
| 111 | Steens, Mason | 33 | 02/17/2010 | 02/17/2010 | \$0.00 | \$0.00 |
| 148 | Good Vision | 11 | 03/11/2010 | 03/11/2010 | \$107.00 | \$107.00 |
| 150 | Steens, Mason | | 03/11/2010 | 03/11/2010 | \$170.00 | \$170.00 |
| TOTAL | | | | | \$1,334.00 | \$1,258.79 |

Buttons: Open, New Invoice

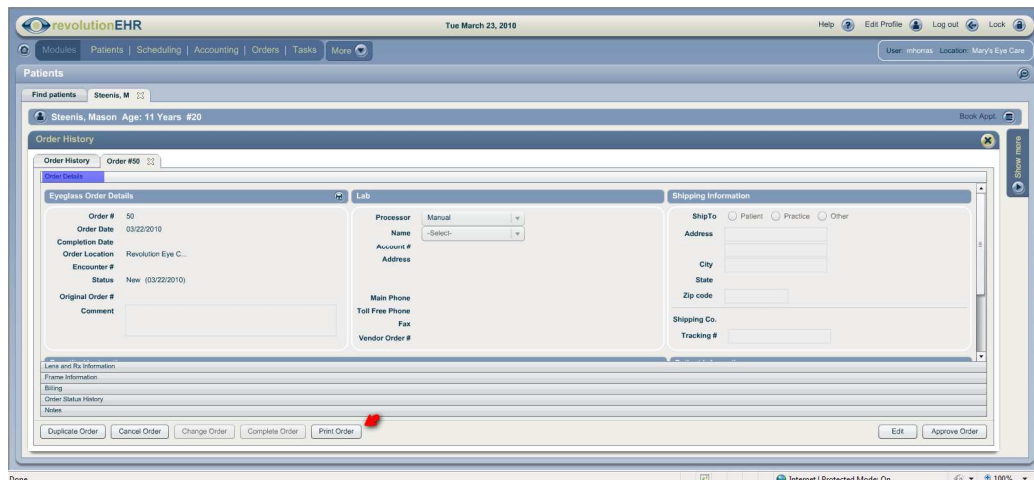
1.3 Administration

1.3.1 Employee Access Log

A requirement has been added before running an "Employee Access Log" search. Users must now select a user and/or set a date range before the "Search" button will become active.

1.4 Orders

The print button for an order has been moved, it is no longer necessary to be in the "Order Details" slider to access the print button. You may now print the order from any slider, by clicking "print" in the bottom left:



Order History Order #50

Order Details

| | |
|------------------|---------------------|
| Order # | 50 |
| Order Date | 03/22/2010 |
| Completion Date | |
| Order Location | Revolution Eye C... |
| Encounter # | |
| Status | New (03/22/2010) |
| Original Order # | |
| Comment | |

Lab

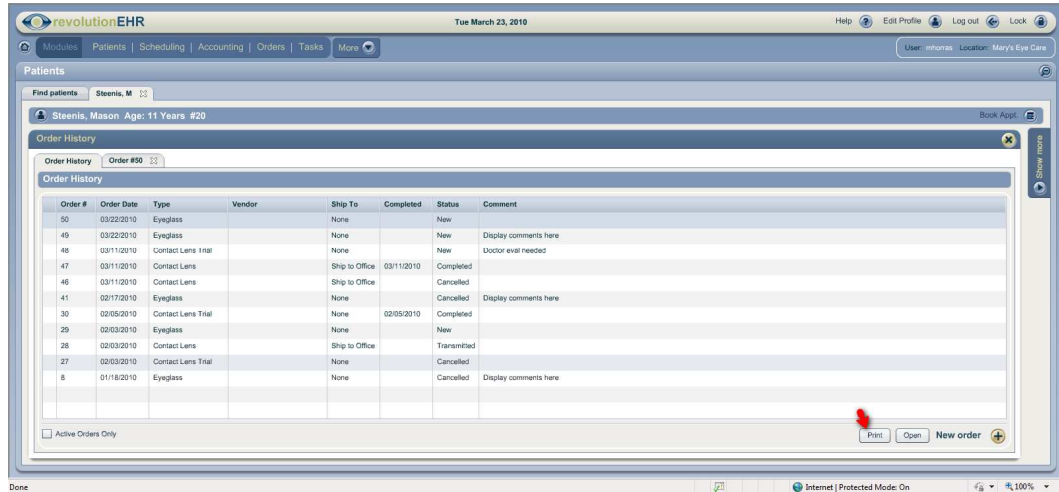
| | |
|-----------------|----------|
| Processor | Manual |
| Name | -Select- |
| Account # | |
| Address | |
| Main Phone | |
| Toll Free Phone | |
| Fax | |
| Vendor Order # | |

Shipping Information

| | |
|--------------|--|
| Ship To | <input type="radio"/> Patient <input type="radio"/> Practice <input type="radio"/> Other |
| Address | |
| City | |
| State | |
| Zip code | |
| Shipping Co. | |
| Tracking # | |

Buttons: Duplicate Order, Cancel Order, Change Order, Complete Order, **Print Order** (highlighted), Edit, Approve Order

A print button has also been added to under the grids displayed in the Orders Module, and also in the Order History component within the patient's file.



revolutionEHR Tue March 23, 2010

Modules Patients | Scheduling | Accounting | Orders | Tasks More

Users: jhansen Location: Mary's Eye Care

Find patients Steenis, M

Steenis, Mason Age: 11 Years #20

Order History Order #50

| Order # | Order Date | Type | Vendor | Ship To | Completed | Status | Comment |
|---------|------------|--------------------|--------|----------------|------------|-------------|-----------------------|
| 50 | 03/22/2010 | Eyeglass | | None | | New | |
| 49 | 03/22/2010 | Eyeglass | | None | | New | Display comments here |
| 48 | 03/11/2010 | Contact Lens Trial | | None | | New | Doctor eval needed |
| 47 | 03/11/2010 | Contact Lens | | Ship to Office | 03/11/2010 | Completed | |
| 46 | 03/11/2010 | Contact Lens | | Ship to Office | | Cancelled | |
| 41 | 02/17/2010 | Eyeglass | | None | | Cancelled | Display comments here |
| 30 | 02/05/2010 | Contact Lens Trial | | None | 02/05/2010 | Completed | |
| 29 | 02/03/2010 | Eyeglass | | None | | New | |
| 28 | 02/03/2010 | Contact Lens | | Ship to Office | | Transmitted | |
| 27 | 02/03/2010 | Contact Lens Trial | | None | | Cancelled | |
| 8 | 01/18/2010 | Eyeglass | | None | | Cancelled | Display comments here |

☐ Active Orders Only

Print Open New order



Orders Orders Home Order #34

Revolution Eye Care Filter Clear Advanced Search

| # | Order Date | Type | Vendor | Patient | Ship To | Completed | Status | Status Date | Comment |
|----|------------|--------------------|--------|------------------|----------------|-----------|-------------|-------------|--------------------|
| 50 | 03/22/2010 | Eyeglass | | Steenis, Mason | None | | New | 03/22/2010 | |
| 44 | 02/24/2010 | Eyeglass | | Steenis, Leah | None | | New | 02/24/2010 | |
| 43 | 02/24/2010 | Eyeglass | | Steenis, Leah | None | | New | 02/24/2010 | |
| 42 | 02/22/2010 | Eyeglass | | Doe, John | Ship to Office | | New | 02/22/2010 | |
| 34 | 02/11/2010 | Contact Lens | | Doe, John | None | | Approved | 02/11/2010 | |
| 29 | 02/03/2010 | Eyeglass | | Steenis, Mason | None | | New | 02/03/2010 | |
| 28 | 02/03/2010 | Contact Lens | | Steenis, Mason | Ship to Office | | Transmitted | 02/03/2010 | |
| 26 | 02/02/2010 | Eyeglass | | Steenis, Leah | Ship to Office | | Transmitted | 02/02/2010 | |
| 25 | 02/01/2010 | Eyeglass | | Steenis, Leah | None | | Approved | 02/01/2010 | |
| 24 | 02/01/2010 | Eyeglass | | Steenis, Leah | None | | Approved | 02/24/2010 | |
| 23 | 01/25/2010 | Eyeglass | | Hornas, Mary | Ship to Office | | New | 01/25/2010 | |
| 22 | 01/23/2010 | Contact Lens | | Klute, Austin | None | | Transmitted | 02/11/2010 | |
| 21 | 01/23/2010 | Contact Lens Trial | | Klute, Austin | None | | New | 01/23/2010 | |
| 20 | 01/23/2010 | Eyeglass | | Martinez, Rachel | None | | New | 01/23/2010 | |
| 19 | 01/23/2010 | Contact Lens Trial | | Klute, Austin | None | | New | 01/23/2010 | Doctor eval needed |
| 18 | 01/23/2010 | Eyeglass | | Klute, Austin | None | | Approved | 01/23/2010 | |
| 15 | 01/22/2010 | Eyeglass | | Steenis, Leah | None | | Approved | 01/22/2010 | |
| 14 | 01/22/2010 | Eyeglass | | Steenis, Leah | None | | New | 01/22/2010 | |
| 13 | 01/22/2010 | Eyeglass | | Hornas, Mary | None | | Approved | 01/22/2010 | |
| 10 | 01/22/2010 | Eyeglass | | Hornas, Mary | None | | New | 01/22/2010 | |

Print Open New Order

1.5 Accounting

1.5.1 Diagnosis display on invoices and statements

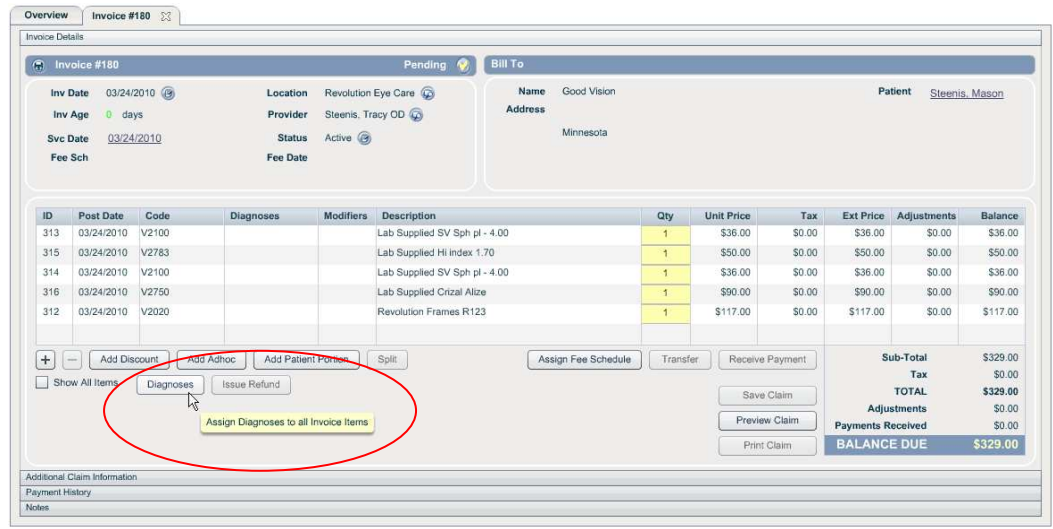
When a diagnosis code is set as "primary" in the assessment screen of an encounter, that diagnosis code will always be listed first on the invoice, invoice print out, and statement print out.

1.5.2 Assigning diagnosis codes to multiple line items

Previously if a diagnosis code(s) needed to be associated to more than one line item on an invoice, the user was required to double click on each line item individually to assign the code(s).

An enhancement has been made that will allow you to assign diagnosis code(s) to all items on an invoice from one screen.

With the pending invoice open, click on the new "Diagnoses" button



The screenshot shows the 'Invoice #180' details page. The 'Diagnoses' button is circled in red. Below the button, a tooltip reads 'Assign Diagnoses to all Invoice Items'. The interface includes a table of invoice line items and a summary section on the right.

| ID | Post Date | Code | Diagnoses | Modifiers | Description | Qty | Unit Price | Tax | Ext Price | Adjustments | Balance |
|-----|------------|-------|-----------|-----------|-------------------------------|-----|------------|--------|-----------|-------------|----------|
| 313 | 03/24/2010 | V2100 | | | Lab Supplied SV Sph pl - 4.00 | 1 | \$36.00 | \$0.00 | \$36.00 | \$0.00 | \$36.00 |
| 315 | 03/24/2010 | V2783 | | | Lab Supplied Hi index 1.70 | 1 | \$50.00 | \$0.00 | \$50.00 | \$0.00 | \$50.00 |
| 314 | 03/24/2010 | V2100 | | | Lab Supplied SV Sph pl - 4.00 | 1 | \$36.00 | \$0.00 | \$36.00 | \$0.00 | \$36.00 |
| 316 | 03/24/2010 | V2750 | | | Lab Supplied Crizal Alize | 1 | \$90.00 | \$0.00 | \$90.00 | \$0.00 | \$90.00 |
| 312 | 03/24/2010 | V2020 | | | Revolution Frames R123 | 1 | \$117.00 | \$0.00 | \$117.00 | \$0.00 | \$117.00 |

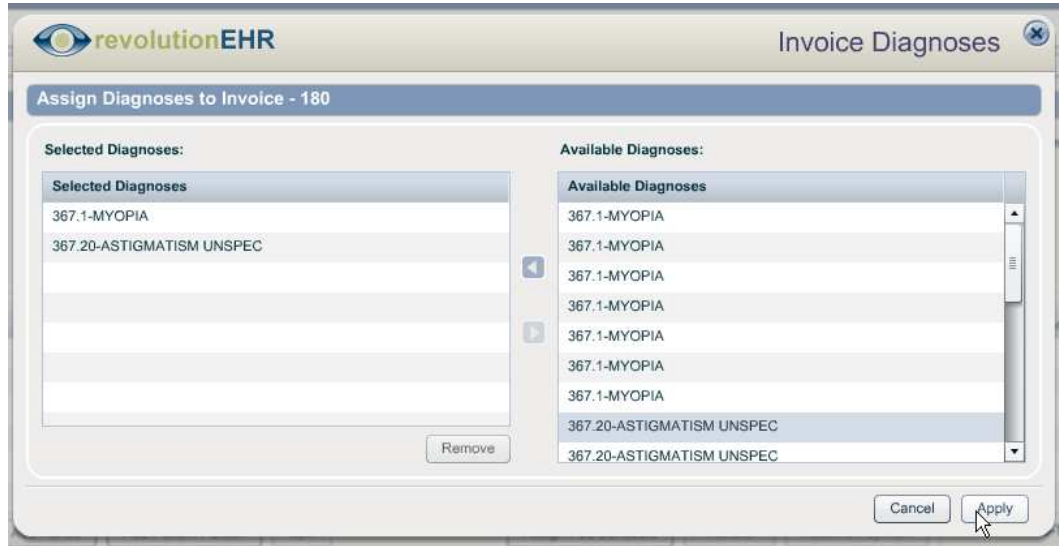
Buttons: Add Discount, Add Adhoc, Add Patient Portals, Split, Assign Fee Schedule, Transfer, Receive Payment, Save Claim, Preview Claim, Print Claim.

Summary:

| | |
|--------------------|-----------------|
| Sub-Total | \$329.00 |
| Tax | \$0.00 |
| TOTAL | \$329.00 |
| Adjustments | \$0.00 |
| Payments Received | \$0.00 |
| BALANCE DUE | \$329.00 |

Select the appropriate diagnosis codes from the list on the right and move them to the list on the left. This can be done by double clicking on the diagnosis code, drag and drop, or using the left pointing arrow

Click Apply:



Assign Diagnoses to Invoice - 180

Selected Diagnoses:

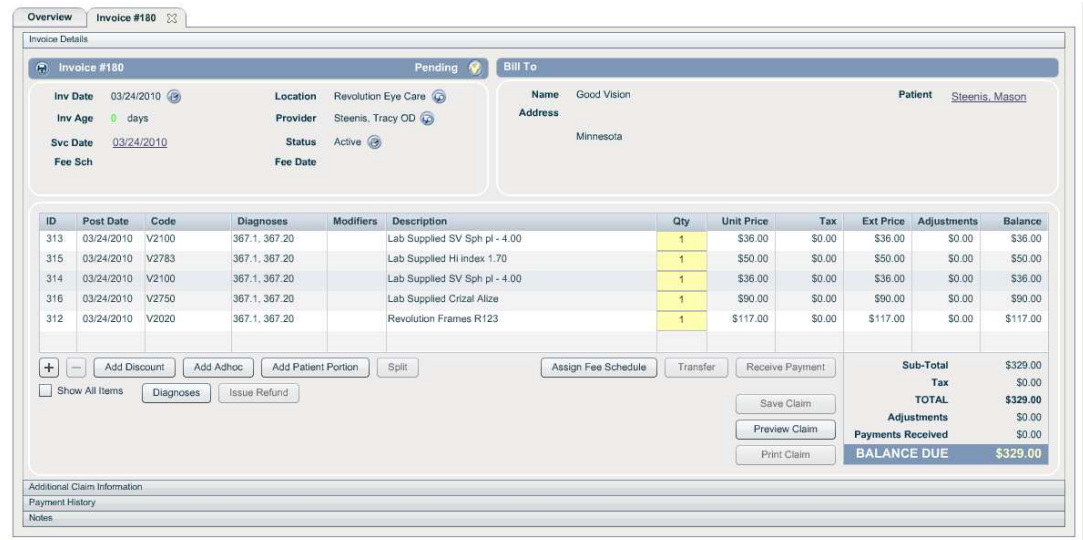
| Selected Diagnoses |
|---------------------------|
| 367.1-MYOPIA |
| 367.20-ASTIGMATISM UNSPEC |

Available Diagnoses:

| Available Diagnoses |
|---------------------------|
| 367.1-MYOPIA |
| 367.1-MYOPIA |
| 367.1-MYOPIA |
| 367.1-MYOPIA |
| 367.1-MYOPIA |
| 367.1-MYOPIA |
| 367.20-ASTIGMATISM UNSPEC |
| 367.20-ASTIGMATISM UNSPEC |

Remove Cancel Apply

The selected diagnosis codes will now be associated to all products and services within the invoice:



Overview Invoice #180

Invoice Details

Invoice #180 Pending

Inv Date 03/24/2010 **Location** Revolution Eye Care **Inv Age** 0 days **Provider** Steenis, Tracy OD **Svc Date** 03/24/2010 **Status** Active **Fee Sch** **Fee Date**

Bill To **Name** Good Vision **Patient** Steenis, Mason **Address** Minnesota

| ID | Post Date | Code | Diagnoses | Modifiers | Description | Qty | Unit Price | Tax | Ext Price | Adjustments | Balance |
|-----|------------|-------|---------------|-----------|-------------------------------|-----|------------|--------|-----------|-------------|----------|
| 313 | 03/24/2010 | V2100 | 367.1, 367.20 | | Lab Supplied SV Sph pl - 4.00 | 1 | \$36.00 | \$0.00 | \$36.00 | \$0.00 | \$36.00 |
| 315 | 03/24/2010 | V2783 | 367.1, 367.20 | | Lab Supplied HI index 1.70 | 1 | \$50.00 | \$0.00 | \$50.00 | \$0.00 | \$50.00 |
| 314 | 03/24/2010 | V2100 | 367.1, 367.20 | | Lab Supplied SV Sph pl - 4.00 | 1 | \$36.00 | \$0.00 | \$36.00 | \$0.00 | \$36.00 |
| 316 | 03/24/2010 | V2750 | 367.1, 367.20 | | Lab Supplied Crizal Alize | 1 | \$90.00 | \$0.00 | \$90.00 | \$0.00 | \$90.00 |
| 312 | 03/24/2010 | V2020 | 367.1, 367.20 | | Revolution Frames R123 | 1 | \$117.00 | \$0.00 | \$117.00 | \$0.00 | \$117.00 |

+ - Add Discount Add Adhoc Add Patient Portion Split Assign Fee Schedule Transfer Receive Payment

☐ Show All Items Diagnoses Issue Refund

Sub-Total \$329.00 **Tax** \$0.00 **TOTAL** \$329.00 **Adjustments** \$0.00 **Payments Received** \$0.00 **BALANCE DUE** \$329.00

Save Claim Preview Claim Print Claim

Additional Claim Information
Payment History
Notes

You may still double click on a line item to edit that item individually if needed.

2. Fixes

2.1 Accounting

2.1.1 Aging Report

Previously, the printed version of the Aging Report would not appropriately display the total amount if the amount were too large. This field has been enlarged to appropriately display all amounts.

2.1.2 Invoice Print Out

Users were receiving an error message when trying to print a guest invoice if a tax ID was not associated to the provider on that invoice, or if no provider were associated to the invoice. When the invoice did print, the patient name printed null, null. These issues have been resolved.

2.1.3 Invoices not getting marked as paid automatically

A bug existed that would occasionally not update an insurance invoice to the status of "paid" when a payment was applied along with a transfer. This was not happening on all invoices, and was difficult to recreate. A change was implemented to try and resolve this issue.

2.1.4 Advanced Search

The "Clear" button in the Advanced Search area of the Accounting Module would not clear any text that was entered in the filter field in the Basic Search. This has been changed and "Clear" will now clear out all search entries in the Accounting Module

Another issue occurred in the Advanced Search area with a recent release that moved the "Clear" and "Submit" buttons to the right. Users with their resolution set low or small monitors were unable to scroll to the right to access these buttons. This has been fixed.

2.1.5 Fee Schedule

A "Null" error would occur when applying a Fee Schedule to an invoice when the product or service previously had a fee schedule maximum allowable value, but was later updated to no longer have a maximum allowable. This has been fixed, and no error will occur.

2.2 Marketing

2.2.1 Export

The time being displayed on the exported file for an appointment search in Marketing was off by one hour for some offices. This was dependant on the time zone for that office. This issue has been fixed.

2.3 Scheduling

2.4.1 Appointment display

An issue was occurring when using the forward and backward buttons to move day by day in the Scheduling Module. When the buttons were pressed too quickly the appointments displayed would not always be the correct appointments for the date being shown at the top of the schedule. This issue has been resolved.

2.4.2 Horizontal View

Many times the schedule would display the appointments in the vertical list, but would not display them in the horizontal view until an appointment or slot was selected from the vertical list. This issue has also been resolved.

2.4.3 Appointment Time on Print Out

For users living in area where the clocks are not adjusted for daylight savings time, all printed versions of the schedule and appointment summaries would print the times off by one hour during daylight savings. This has been fixed.

2.4 Patient Module

2.4.4 Setting the Guarantor

Previously an error message would occur when a Family Member was added to a patient's file, and the user tried to set the new Family Member as the Guarantor without closing and reopening the patient's file. This has been fixed, and the error message will no longer occur in this situation.

2.4.5 Book Appointment

When clicking the "Book Appointment" button from within the Patient Module, the insurance slider in the appointment details did not load the patient's insurance information. This problem has been fixed

2.4.6 Providers

When editing information for an external provider from the Provider's Component within a patient's file, changing that provider's practice name

would not update the external provider's details in the Administration Module until the user logged out/in. This has been fixed.

2.5 Orders

2.4.7 Frame Information

When adding a frame to an eyeglass or frame only order in the "Frame Information" slider, the price of that frame would only be displayed if the frame selected was a physical inventory item. If the frame selected was simply the frame product, no price would display. This has been fixed and price will display for any frame selected within the order.

2.6 Inventory

2.4.8 Physical Inventory

When a new frame was imported, and the user immediately tried to add physical inventory items to that newly imported frame, the retail price would not automatically populate for the physical inventory item. This has been fixed.

2.4.9 Product Option Information

If a new color and size were added in the Product Option Information slider and the user hit "Update", but then hit "Edit" again and tried to add another color and/or size, an error would occur, and the new color and size would not be added successfully. This issue has been resolved.