



RevolutionEHR

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RevolutionEHR Release 5.3.6

Release Notes

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Overview

This release of RevolutionEHR brings several new enhancements based on user feedback including bringing forward Care Plan Items to RFV and current care plans, finance charge plans, billing preview for orders, the ability to enter Target IOP for a patient, as well as many other enhancements and fixes.

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1. Enhancements

1.1 Patient

1.1.1 Patient Nickname Displayed in Search Results

When searching for a patient, any patient nicknames will now be displayed in the search results allowing you to easily find the patient you are looking for. The nickname is displayed in parenthesis next to the patient's actual name.

ID	Name	DOB	Pref. Phone	Address
331422	Patient, Test (Nickname)	04/29/1970	(555) 555-0101	123 Main Street, I

1.2 Scheduling

1.2.1 Patient Gender Available in Patient Quick View

Patient Gender can now be easily viewed from the scheduling module in the patient details screen. To access this information, click on the patient name in the Appointment Details window on the right hand side of the schedule.



1.3 Electronic Health Record

1.3.1 Bring Forward Provider Reason for Visit and RFV Screen Update

The RFV screen available in an encounter has been updated to allow users to bring forward previous care plan items into the Reason for Visit screen in order to reduce the amount of manual entry.

A new "Dx/CPI Reason For Visit" section has been added to the RFV screen below the Patient and Provider Reason For Visit. To bring forward a care plan item into the Reason For Visit, click the folder icon in the top right corner of the Dx/Care Plan Item section.



Patient Reason For Visit

Provider Reason For Visit

Referring Provider: - None -

Additional Reason

Dx/CPI Reason For Visit

Dx Date	ICD-9	Dx Description	CPI Type	CPI Start	CPI Description

Review and Bring Forward Care Plan Items



Past Diagnoses

Dx Date	ICD-9	Description	Status
04/05/2012	367.1	MYOPIA	Active

Past Care Plan Items - 367.1

Type	Start	Stop	Description
Recall	04/05/2012		RTC 04/12/2012 for Compre
General	04/05/2012		Reviewed Care and Handlin

Current Provider RFV Selection

Dx Date	ICD-9	Description	Status	Type	Start	Stop	Description
04/05/2012	367.1	MYOPIA	Active	Recall	04/05/2012		RTC 04/12/2012 for Comprehensive

Set Primary

Cancel

Select as RFV

On the Provider RFV Selector screen, select a diagnosis from the **Past Diagnoses** section to review care plan items for that diagnosis. Double click or click drag care plan items from the **Past Care Plan Items** section to the **Current Provider RFV Selection** section. Multiple care plan items can be selected and dragged to the RFV selection by using the 'Ctrl' or 'Shift' key on your keyboard.

To set a primary Provider RFV, select the RFV in the **Current Provider RFV Selection** section and then click the **Set Primary** button. The **Set Primary** button will automatically check the Medical Reason checkbox if the primary RFV is associated with a diagnosis code other than 367.xx. If the primary RFV is associated with a 367.xx diagnosis code, the Medical Reason checkbox will be left unchecked.

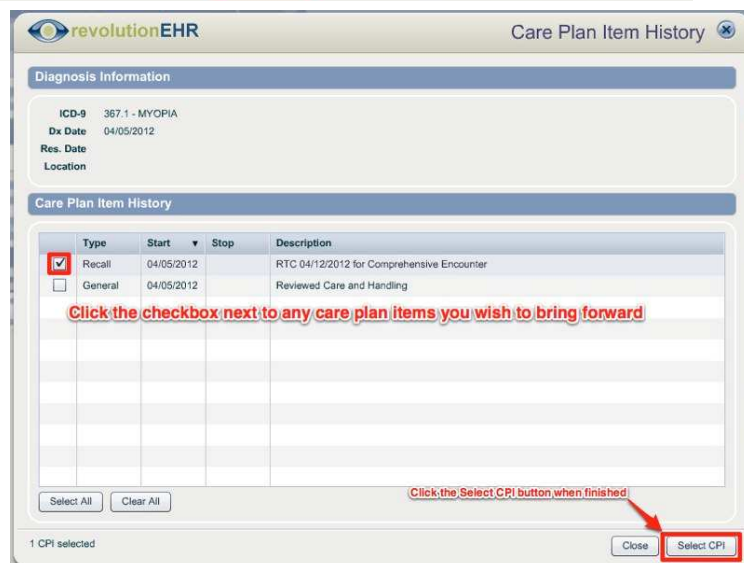
Click **Select as RFV** to save any changes and return to the encounter.

1.3.2 Care Plan Item History Review and Bring Forward

The care plan screen has been updated to give the user the ability to quickly review and bring forward patient care plan items from previous encounters. To review the care plan history for a specific diagnosis, click the **CPI Hx** button for that diagnosis.



To bring forward a previous care plan item into the current care plan, double click or click the checkbox next to each item that you wish to bring forward. When finished, click the **Select CPI** button to return to the encounter.



NOTE that RevolutionEHR will make certain care plan items unavailable if they are considered duplicates of other care plan items that have already been selected. In the case of a duplicate care plan item, the checkbox for that item will be unavailable.

1.3.3 Time Stamp for Documenting DPAs Used

While documenting diagnostic pharmaceutical agents used for a patient in an encounter, RevolutionEHR now includes the ability to add a time stamp to the exam documentation.

Please note that this enhancement will increase the size of the DPAs Used test which might require an edit to the layout of the screen to account for the new test size. For more information on adding tests or editing the layout of a screen visit the Insight page here: <http://insight.revolutionehr.com/?p=862>

Tip: To enter the current time as timestamps, double click in the Time field on the DPAs Used Test.



1.3.4 Enter and Track Target IOP in Ongoing Care

The newest version of RevolutionEHR includes the ability to enter and track the Target IOP within the Ongoing Care section of a patient chart.

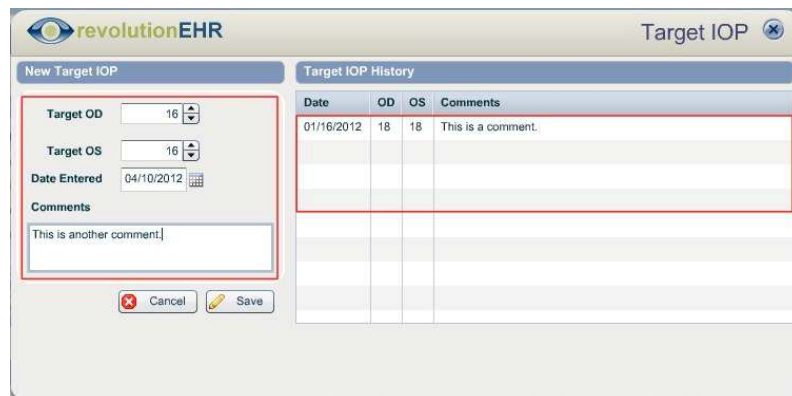
To access the Glaucoma Care Screen, open Show More on the right hand side from a patient chart then click Ongoing Care. Click on the Glaucoma Care tab to view and edit the Target IOP for a patient.



IOP Summary		
IOP Management	OD	OS
Initial IOP	18.0	18.0
Maximum IOP	18.0	18.0
Target IOP	16	16
Adjusted IOP		

 **Click to edit Target**

Click on the Edit Target button to bring up the Target IOP Screen. On this screen the user can enter a specified Target IOP for each eye as well as dates and comments for that target. The complete Target IOP history can be viewed on the right hand side of this screen to easily track previous targets, dates and comments.



revolutionEHR Target IOP

New Target IOP

Target OD: 16

Target OS: 16

Date Entered: 04/10/2012

Comments: This is another comment.

Cancel Save

Target IOP History

Date	OD	OS	Comments
01/16/2012	18	18	This is a comment.

1.3.5 Interact with RevolutionEHR while writing Communication Letters

While creating or editing communication letters within an encounter, users now have the ability to drag the letter window to a different area of the screen and interact with the encounter in the background to view any additional exam documentation that might be needed for the letter.

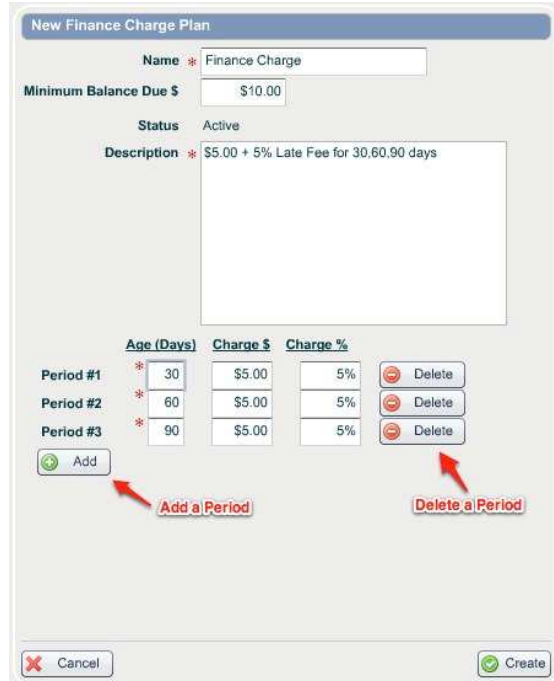


To move the Communication Template window or the Template Preview window, click and hold the header of the window then drag and release the window to view any needed encounter documentation. To view other areas of the encounter, click the workflow step on the left hand side just as you would normally navigate through an encounter.

- 3) The new plan screen will allow you to set the terms of your finance charge plan including Minimum Balance Due, Finance Periods and Charges by dollar amount, percentage or a combination of both.

RevolutionEHR will create default periods for 30, 60, and 90 days. To add or delete a finance period click the Add or Delete button. A finance plan can have as few as one period or as many periods as needed. Each period will add an additional charge to the invoice.

When you are finished entering the plan, click the Create button.



Note that Finance Charge Plans cannot be edited after creation. Plans can only be deactivated.

Assigning a Default Finance Charge Plan for a Location

Assign each practice location to a default charge plan in the More -> Administration -> General -> Locations -> Location Details screen.



When a default finance charge plan has been assigned to a location, that

finance charge plan will automatically be associated to all new patient invoices created after the plan was assigned to the location. The plan will not be assigned to existing patient invoices.

To un-assign a Default Charge Plan for the location:

- On a PC, click the dropdown and press the 'Delete' key.
- On a Mac, click the dropdown and press the 'Fn' and 'Delete' key on your keyboard simultaneously.

Applying Finance Charges to an Invoice

If a default finance charge plan has been assigned to the practice location, the finance charge plan will automatically be added to all new patient invoices. This can be verified on each invoice, just below service date.



Invoice #960

Inv Date 01/19/2012

Inv Age 85 days

Svc Date 12/04/2011

Finance Charge Plan Finance Charge

If a finance charge plan is not associated to an invoice or you would like to change the finance charge plan that is currently associated to the invoice, click the blue edit button next to the Finance Charge Plan option. Select the appropriate finance charge plan from the drop down, and click OK.



revolutionEHR Select Invoice Plan

Select Finance Charge Plan

Available Plans * Finance Charge

Cancel OK

Finance Charges are automatically applied to an invoice that meets criteria set in the selected finance charge plan when the invoice is **Authorized**.

ID	Post Date	Code	Diagnoses	Modifiers	Description
2592	02/17/2012	v2520			Ciba Vision Corporation Focus 1-2 Week SoftColors
2593	02/17/2012	v2520			Ciba Vision Corporation Focus 1-2 Week SoftColors
2953	04/13/2012	FIN-CHG			Finance Charge (30 days overdue: 5.00% + \$5.00 where invoice balance=\$76.76)

For authorized patient invoices, RevolutionEHR will update the finance charges applied to those invoices when the invoice age meets the next period set up for the finance charge plan associated to that invoice. This occurs nightly and is automatic. No action needs to be taken by the user on an authorized invoice that has an associated finance charge plan.

NOTE: When an invoice is un-Authorized and changed to pending status, any applied finance charges will be removed from the invoice. The finance charges will be re-applied when the invoice is Authorized again. These actions will both create separate journal entries to track the activity of this invoice.

Removing Finance Charges or Applying Alternate Finance Charge Plans to an Invoice

To remove finance charges from an invoice, the invoice must first be in **Pending** status. If the invoice has already been authorized, the invoice must be un-Authorized to be placed in pending status.



Change or Remove the Finance Charge Plan for this invoice by clicking the blue folder icon next to the current Finance Charge Plan.



Select an alternate plan in the 'Available Plans' dropdown, or to remove a plan completely:

- On a **PC**, click the Available Plans dropdown and press the 'Delete' key on your keyboard then click the 'OK' button.
- On a **Mac**, click in the Available Plans dropdown and press the 'Fn' and 'Delete' keys simultaneously then click the 'OK' button

NOTE: User permissions setup by the practice may limit specific users from changing the finance charge plan for an invoice or un-authorizing an invoice.

These permissions can be changed in the User Roles menu available in More -> Administration -> Employees/Roles -> User Roles. Double click on a user role to edit the permissions for that role.

To Allow/Disallow a user to un-authorize an invoice with finance charges, go to the Accounting permissions folder and check (allow) or uncheck (disallow) 'Unauthorized Invoice with Finance Charges'. By default, RevolutionEHR only allows this permission for the System Administrator role.

To Allow/Disallow a user to change the finance charge plan for an invoice, go to the Accounting permissions folder and check (allow) or uncheck (disallow) 'Edit Invoice Finance Charge Plan'. By default, RevolutionEHR only allows this permission for the System Administrator role.



1.5 Orders

1.5.1 Billing Preview Available Before Approving Order

Any user now has the ability to preview the billable items and charges for an order before it is approved in RevolutionEHR.

Billing				
Associated Encounter				
Associated Encounter		None assigned		
Billing Preview				
Code	Description	Unit	Quantity	Total
V2103	sv sphcyl pl - 4.00/ 12 - 2.00	\$30.00	1	\$30.00
V2103	sv sphcyl pl - 4.00/ 12 - 2.00	\$30.00	1	\$30.00
V2020	EHR 123	\$190.00	1	\$190.00
V2750	AR Crizal	\$80.00	1	\$80.00
			TOTAL	\$330.00

To view a preview of the charges for an order, click the update button at any time within an order and click on the Billing slider.

If the order has not yet been Approved, the Billing Preview section will give you a preview of the charges for the order. Once the order is Approved, the usual billing screen will appear allowing the user to assign billable items.

1.6 Task Updates

1.6.1 Task Screen Updates

The Add Task screen has been updated to reduce confusion when assigning multiple employees to a task. When creating a task for multiple employees, select assignees in the Assign To area by clicking the checkbox next to their name.



To create individual tasks that are required for each assignee, click the **'Require ALL Assignees to Complete this Task'** checkbox. This will create a separate task for each assignee.

To create a task that is shared between assignees, do NOT click the 'Require ALL Assignees to Complete this Task' checkbox. This will create one task that is shared between all assignees.

1.6.2 Launch RxNT Button Available for Prescription Tasks

If a task is created with 'Prescription' as the designated category, a 'Launch RxNT' button will be available on the task screen as a shortcut to the RxNT prescribing home page.



The 'Launch RxNT' button will only be available to users that have the RxNT interface enabled for their login.

1.7 Marketing

1.7.1 Recall Information Available in Patient Search

When creating or editing a patient search query in the Marketing module of RevolutionEHR, recall information is now available for query results and criteria.

Recall Template, Recall Date, Recall Status, and Recall Comments can now be used in practice patient search queries.



1.8 Other

1.8.1 Encounter Screen Layout Editor

When editing the layout of encounter test screens in the Administration area, the area of the Screen Layout popup has been increased. This enhancement will give the user more useable space when editing or creating encounter test screens.

1.8.2 Invoice Service Date Available in Ledger Posting Report

The service date of invoices has been added as a column to the Ledger Posting Report available in Accounting -> Reports -> Other. The Ledger Posting Report allows you to view and export ledger information contained in RevolutionEHR.

2. Fixes

2.1 Electronic Health Record

2.1.1 Inactive Diagnoses Available in Encounter

When a diagnosis is deactivated in the Administration -> Data Configuration menu, the inactive diagnosis was still available to diagnose the patient within an encounter. This issue has been resolved.

2.1.2 Vital Signs Test Available for Editing on Signed Encounter

The Vital Signs test was available for editing even when an encounter has been signed. RevolutionEHR has been updated to no longer allow changes to the vital signs test when the encounter is signed.

2.1.3 Discontinued Medications Displayed on Clinical Summary

Medications that have been discontinued were printing on the patient clinical summary. This issue has been resolved.

2.2 Accounting and Claims

2.2.1 Secondary Claim Payor

When adding a secondary insurance to a claim in the Additional Claim Information slider, an insurance option was not available in the dropdown if the insurance was added or edited with the claim still open. This issue has been resolved.

2.2.2 Claim Frequency Code Note for Original Ref Number

When creating a claim, if a claim frequency code other than "1 – Original" is selected on the (5010) Claim Codes tab, RevolutionEHR now adds a note that the Original Ref Number should be added to the Additional Claim Information tab.

2.2.3 Handwritten Signature Required on Insurance Claim (HCFA)

In the case that an insurance payor requires that the paper HCFA claim form be physically signed by the provider, this can be designated on the claim invoice in the **Additional Claim Information** slider. **(31) Signature Handwritten** can be checked to prevent RevolutionEHR from electronically signing the claim for the provider.




(31) Signature Handwritten

NOTE that this feature cannot be used on electronic claims.

2.2.4 Referral Number for Electronic Claims

In the instance that a referral number is required for an electronic claim to be submitted, the referral number can be entered on the (5010) Claim Codes tab in the Additional Claim Information slider.



Additional Claim Information

General (5010) Claim Codes

(5010) Claim Codes

Claim Frequency Code 1-ORIGINAL (Admit thru Discharge Claim) ▼

Initial Treatment Date

Vision Prescription Date

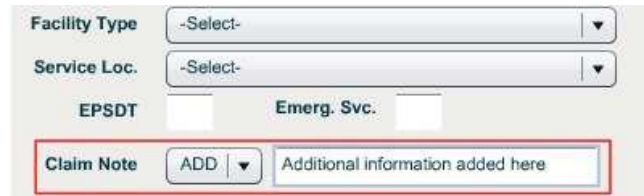
Referral Number

If a printed claim requires a referral number, this number can continue to be entered in the '(23) Prior Auth field' on the General tab of the Additional Claim Information slider.

2.2.5 Send Additional Required Information on Electronic Claims

If additional information is required for a specific line item on an electronic claim, RevolutionEHR offers the ability to include identifiers such as ADD, DCP, PMT, or TPO for each line item as well as include additional notes with the identifier.

These identifiers and claim notes can be added by double clicking on a line item within the insurance invoice to open the Invoice Item Detail screen.



The screenshot shows a form with the following fields: Facility Type (dropdown menu with '-Select-' selected), Service Loc. (dropdown menu with '-Select-' selected), EPSDT (checkbox), Emerg. Svc. (checkbox), and Claim Note (dropdown menu with 'ADD' selected and a text box containing 'Additional information added here'). The Claim Note field is highlighted with a red border.

Select an identifier from the Claim Note dropdown and enter any additional notes in the text box next to the dropdown.

The identifiers available for claim notes are:

ADD – Additional Information

DCP – Goals, Rehabilitation Potential, or Discharge Plans

PMT – Payment

TPO – Third Party Organization Notes

2.2.6 Service Location by Line Item for Electronic Claims

In a situation where individual services on an electronic claim have been performed at varying service locations, RevolutionEHR offers the ability to set the service location for each line item on the insurance invoice.

The service location for a line item can be set by double clicking the line item on a pending insurance invoice.



The screenshot shows a dropdown menu for Service Loc. with 'Happy Hills Nursing Home' selected.

Service locations can be added in More -> Administration -> Vendors/Partners -> Alternate Service Locations.

2.2.7 Attached Paperwork Information for Electronic Claims

On electronic claims it may be necessary to indicate to the payor that a separate document has been sent in reference to this claim or that the document is simply on file.

This is noted on the claim to the payor on the (5010) Claim Codes tab of the Additional Claim Information slider in a new section labeled Attached Paperwork.



TIP If an item is selected from either the type or transmission dropdowns a tool tip will appear with the description of the code selected.

2.2.8 Alternate Service Location Issue

An issue existed where the alternate service location selected was not being transmitted on certain claims, this issue has been resolved.

2.3 Administration

2.3.1 City and State Lookup by Zip Code for Practice Location

When creating a new location in RevolutionEHR, the system will now perform a City and State lookup based on the Zip code entered to reduce data entry.

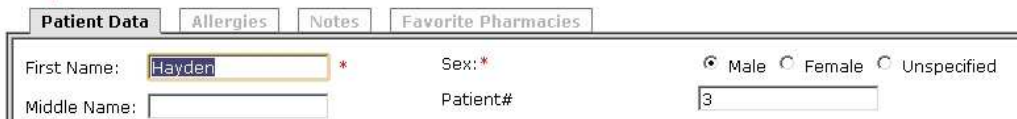
2.4 RxNT Refill Requests

2.4.1 RxNT Tasks for Refills

Some customers have noticed that RevolutionEHR was not consistently creating a task to notify the provider of an RxNT refill request. This issue was a result of RxNT not returning a valid patient identifier to RevolutionEHR with the refill request. These requests in the past were ignored, but RevolutionEHR will now create a refill task to notify the provider.

In the case where a refill request is not associated with a patient automatically, it is best to enter the RevolutionEHR Patient ID into the RxNT Patient# field so that future refill requests will automatically be associated to a patient in RevolutionEHR. This can be done when launching RxNT to authorize the refill.

To enter the Patient# in RxNT, go to the Patient Data tab within RxNT and find the Patient# field shown below.



The screenshot shows a software interface with four tabs: Patient Data, Allergies, Notes, and Favorite Pharmacies. The Patient Data tab is active. It contains the following fields:

First Name:	<input type="text" value="Hayden"/>	*	Sex:*	<input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unspecified
Middle Name:	<input type="text"/>		Patient#	<input type="text" value="3"/>

2.5 Other

2.5.1 Copy Inventory for Manually Added Categories

An issue was preventing users from copying products from manually added inventory categories to other locations. This issue has been resolved.

2.5.2 Tooltips with Special Characters

Certain tooltips throughout RevolutionEHR were displayed incorrectly due to special characters (<, >, &) entered by the user. This issue has been resolved and any special characters entered will display correctly.