



RevolutionEHR

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## **RevolutionEHR Release 5.2.0**

### **Release Notes**

**03/13/2011**

## **Overview**

This document includes several enhancements and issue resolutions within RevolutionEHR. Also included are the latest updates related to meaningful use.

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## 1. Enhancements

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### 1.1 Meaningful Use

Two new features are being added in this release as part of our ongoing enhancements for allowing users to meet Meaningful Use in a certified EHR. A separate manual has been created to outline the use and implementation of these features. Sections 1.1.1 and 1.1.2 of these release notes will outline the new features, but an instruction manual will be emailed out separately.

These are enhancements that can be implemented by the user at any time, and will not change the current functionality of the application.

#### 1.1.1 Clinical Decision Making

The ability to create triggers related to “Clinical Decision Making” required for EHR Meaningful Use has been added in this release. The creation of these triggers requires the use of a new feature that will allow the user to create an alert within the encounter when specific actions should be taken based on clinical findings for that patient.

Please watch for the “Meaningful Use Release 5.2.0” Manual to be emailed to you later this week.

#### 1.1.2 Labs and Imaging Orders

The EHR certification process currently requires a system like RevolutionEHR to electronically capture a lab result and allow the user to manually enter the data into the software system. Furthermore, users must have the ability to enter medications via computerized provider order entry (CPOE), but the EHR technology must also be certified to be able to allow a provider to perform CPOE for laboratory testing and radiology evaluations.

A new component for “Labs/Imaging Orders” has been added to the patient’s file to accommodate this Meaningful Use requirement.

Please watch for the “Meaningful Use Release 5.2.0” Manual to be emailed to you later this week.

## 1.2 Prescriptions

### 1.2.1 Stopping an Rx

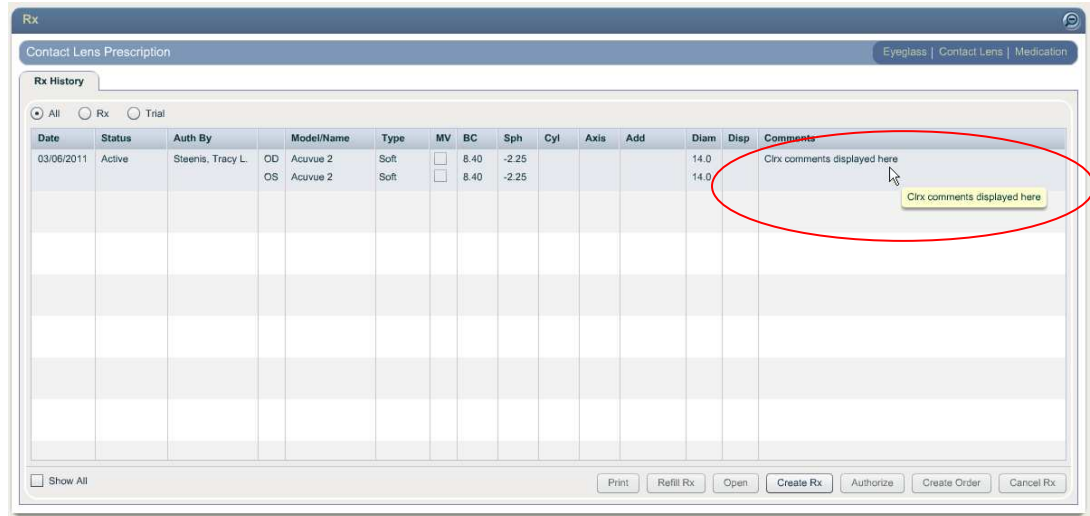
Previously there was a requirement when stopping an rx to select from the reason drop down and also type something into the comments field. This has been changed to only require a selection from the drop down. The comments field will remain, but is no longer required.

### 1.2.2 Contact lens prescription comments

Previously the comments column in the Rx history grid could only display comments from contact lens trial prescriptions. This has been enhanced to also display comments from internal and external contact lens prescriptions.

Because contact lens trial prescriptions allow for comments to be created for OD and/or OS, the display of comments on trial prescriptions is divided to the two rows for OD and OS in the Rx History grid/comments column. However, internal and external contact lens prescriptions only have one comment field. To allow for the display of these comments, they will simply be shown in the top row of the comments column for each prescription

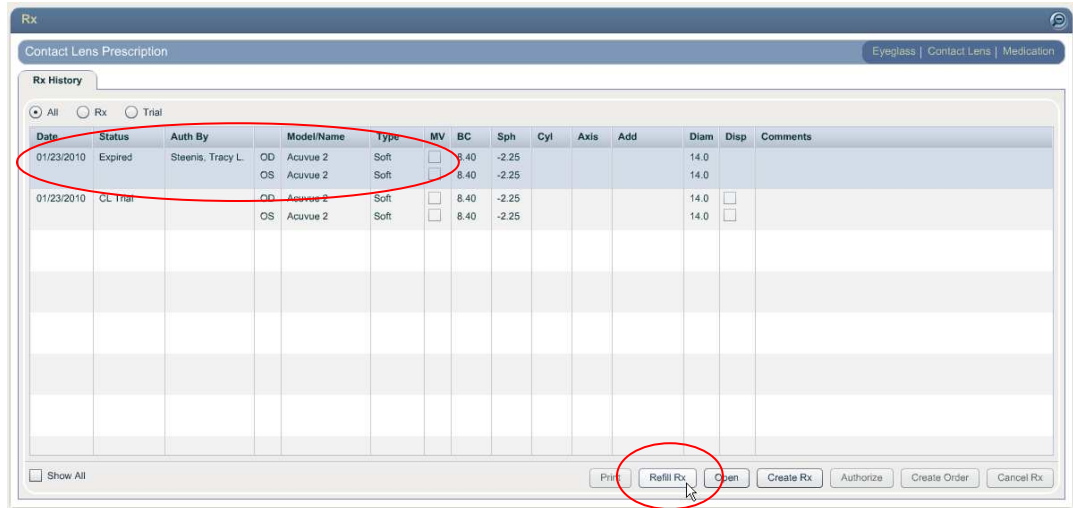
A tool tip has also been added for comments that are too long to be display fully in the grid. Floating your cursor over the comment will display the tool tip.



Date	Status	Auth By	Model/Name	Type	MV	BC	Sph	Cyl	Axis	Add	Diam	Disp	Comments
03/06/2011	Active	Steenis, Tracy L.	OD Acuvue 2	Soft	<input type="checkbox"/>	8.40	-2.25				14.0		Crx comments displayed here
			OS Acuvue 2	Soft	<input type="checkbox"/>	8.40	-2.25				14.0		Crx comments displayed here

### 1.2.3 Refilling expired contact lens and eyeglass prescriptions

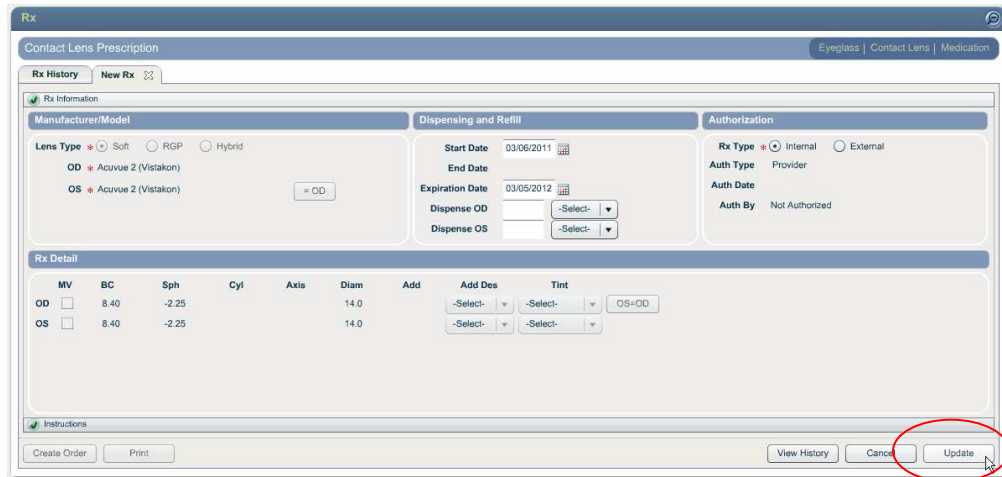
An enhancement has been added to allow users to refill expired contact lens and eyeglass prescriptions. Similar to refilling active prescriptions, simply single click on the appropriate expired prescription in the patient's Rx History grid and click the "Refill Rx" button in the bottom right.



Date	Status	Auth By	ModelName	Type	MV	BC	Sph	Cyl	Axis	Add	Diam	Disp	Comments
01/23/2010	Expired	Steenis, Tracy L.	OD Acuvue 2	Soft	<input type="checkbox"/>	8.40	-2.25				14.0		
			OS Acuvue 2	Soft	<input type="checkbox"/>	8.40	-2.25				14.0		
01/23/2010	CL Trial		OD Acuvue 2	Soft	<input type="checkbox"/>	8.40	-2.25				14.0	<input type="checkbox"/>	
			OS Acuvue 2	Soft	<input type="checkbox"/>	8.40	-2.25				14.0	<input type="checkbox"/>	

Buttons: Print, Refill Rx, Open, Create Rx, Authorize, Create Order, Cancel Rx

When refilling any prescription, the only data editable on the new rx is the start and expiration date. After changing dates if necessary click "Update". The prescription will be authorized automatically.



**Rx Information**

Manufacturer/Model: OD \* Acuvue 2 (Vistakon), OS \* Acuvue 2 (Vistakon) [ = OD ]

Lens Type: ☒ Soft, ☐ RGP, ☐ Hybrid

**Dispensing and Refill**

Start Date: 03/06/2011, End Date: , Expiration Date: 03/05/2012

Dispense OD: [ -Select- ], Dispense OS: [ -Select- ]

**Authorization**

Rx Type: ☒ Internal, ☐ External

Auth Type: Provider, Auth Date: , Auth By: Not Authorized

**Rx Detail**

	MV	BC	Sph	Cyl	Axis	Diam	Add	Add Des	Tint
OD	<input type="checkbox"/>	8.40	-2.25			14.0		[ -Select- ]	[ -Select- ]
OS	<input type="checkbox"/>	8.40	-2.25			14.0		[ -Select- ]	[ -Select- ]

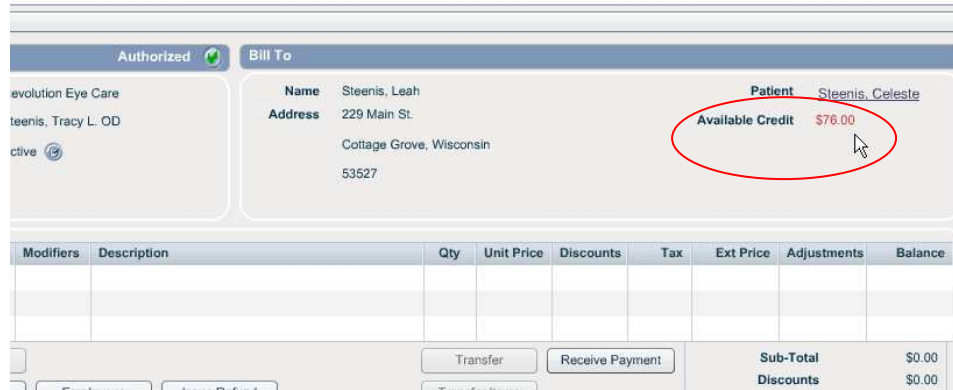
Buttons: Create Order, Print, View History, Cancel, Update

**Note:** If you would like to use an existing Rx to create a new Rx, but would like to edit the data fields for the new Rx, the best method is to hit "Create Rx" and use the "View History" button in the bottom right corner of the new Rx to pull forward an existing Rx and edit as needed.

### 1.3 Accounting

### 1.3.1 Patient credit balances

If a patient has an active credit balance, that amount will now be displayed on any patient invoices for that patient. Once the invoice is authorized, the credit balance will be displayed below the patient name:

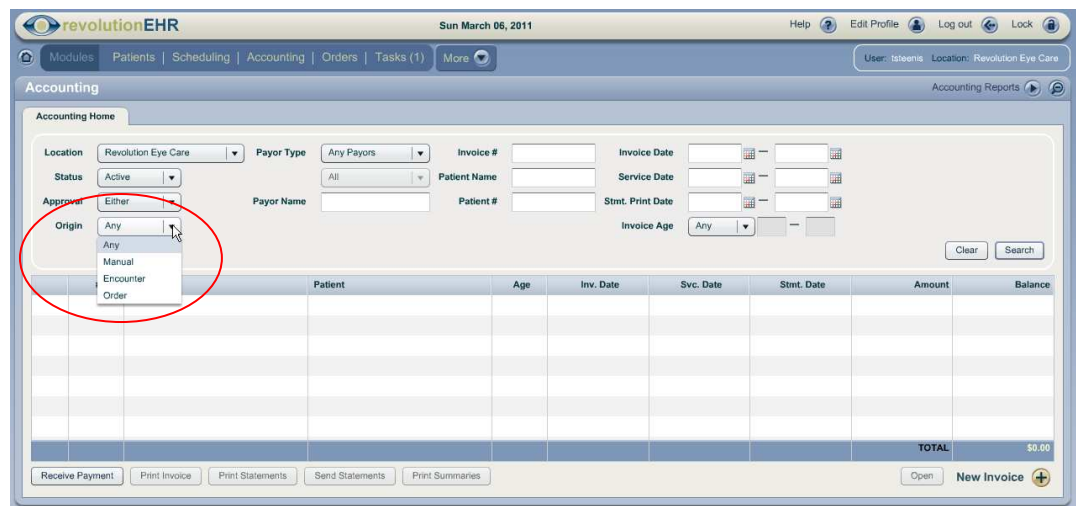


The screenshot shows the 'Authorized' tab for a patient. The patient's name is 'Steenis, Leah' and the address is '229 Main St., Cottage Grove, Wisconsin 53527'. The 'Available Credit' is displayed as '\$76.00', which is circled in red. Below this, there is a table with columns: Modifiers, Description, Qty, Unit Price, Discounts, Tax, Ext Price, Adjustments, and Balance. The table is currently empty. At the bottom, there are buttons for 'Transfer' and 'Receive Payment', and a summary section showing 'Sub-Total' and 'Discounts' both at '\$0.00'.

### 1.3.2 Accounting Module/Advanced Search

A new filter has been added to the search criteria in the Accounting Module. This new drop down is titled "Origin", and allows the user to filter their invoice search based on where the invoice is associated. "Encounter" includes all invoices associated to the billing screen of an encounter. "Order" includes all invoices associated to the billing screen of an order. "Manual" includes invoices that are not associated to an order or encounter.

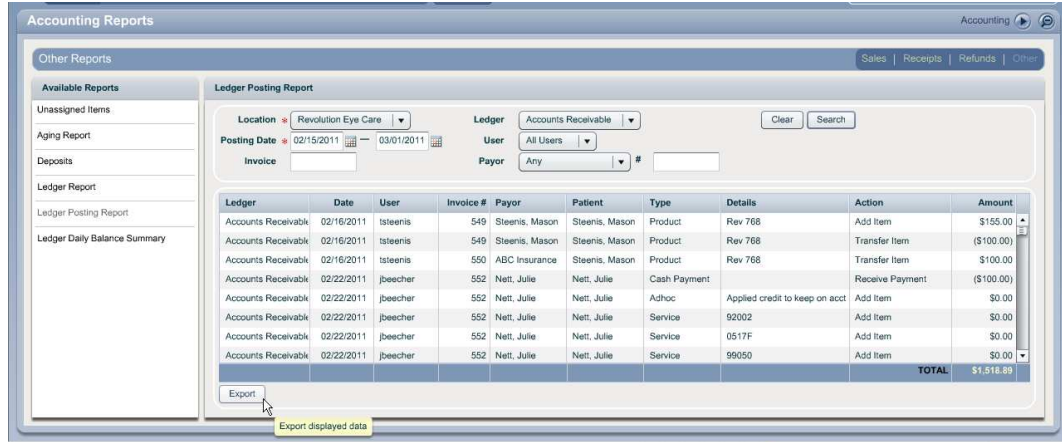
If an order has been associated to an encounter, the invoices in the billing screen of the order and encounter will show up both the "Order" and/or the "Encounter" filter.



The screenshot shows the 'Accounting' module's 'Advanced Search' interface. The 'Origin' dropdown menu is open, showing options: 'Any', 'Manual', 'Encounter', and 'Order'. The 'Origin' dropdown is circled in red. The search criteria include: Location (Revolution Eye Care), Status (Active), Payor Type (Any Payors), Invoice #, Invoice Date, Patient Name, Service Date, Patient #, Stmt. Print Date, Invoice Age, and Payor Name. There are 'Clear' and 'Search' buttons. Below the search criteria is a table with columns: Patient, Age, Inv. Date, Svc. Date, Stmt. Date, Amount, and Balance. The table is currently empty. At the bottom, there are buttons for 'Receive Payment', 'Print Invoice', 'Print Statements', 'Send Statements', 'Print Summaries', 'Open', and 'New Invoice'.

### 1.3.3 Ledger Posting Report

"Patient Name" has been added to the results for the Ledger Posting reports. Also added is an "Export" button found in the bottom left corner of the report. Using this button will export the data to a spreadsheet



Ledger	Date	User	Invoice #	Payor	Patient	Type	Details	Action	Amount
Accounts Receivable	02/16/2011	Isteenis	549	Steenis, Mason	Steenis, Mason	Product	Rev 766	Add Item	\$155.00
Accounts Receivable	02/16/2011	Isteenis	549	Steenis, Mason	Steenis, Mason	Product	Rev 766	Transfer Item	(\$100.00)
Accounts Receivable	02/16/2011	Isteenis	550	ABC Insurance	Steenis, Mason	Product	Rev 766	Transfer Item	\$100.00
Accounts Receivable	02/22/2011	jeescher	552	Nett, Julie	Nett, Julie	Cash Payment		Receive Payment	(\$100.00)
Accounts Receivable	02/22/2011	jeescher	552	Nett, Julie	Nett, Julie	Adhoc	Applied credit to keep on acct	Add Item	\$0.00
Accounts Receivable	02/22/2011	jeescher	552	Nett, Julie	Nett, Julie	Service	92002	Add Item	\$0.00
Accounts Receivable	02/22/2011	jeescher	552	Nett, Julie	Nett, Julie	Service	051TF	Add Item	\$0.00
Accounts Receivable	02/22/2011	jeescher	552	Nett, Julie	Nett, Julie	Service	99050	Add Item	\$0.00
<b>TOTAL</b>									<b>\$1,518.89</b>

### 1.3.4 Care Credit Refunds

The option for "Care Credit Reversal" has been added to the list available when applying a refund to a patient account.

Care Credit Reversals will be displaying in the Deposit Report similar to the current Credit Card Reversal refunds.

### 1.3.5 Payment History slider columns

The column widths on in the payment history slider within the patient's account component have been adjusted to display the information without cutting off data



Account								
Overview								
Account Information								
Invoices								
Payment History								
Payment History								
Date	Inv #	Payor	Method	Ref #	Card	Stat	Comments	Amount
02/10/2011	352	Steenis, Leah	Credit			OK		\$20.00
02/01/2011	536	Steenis, Leah	Check			OK		\$50.00
09/16/2010	83	ABC Insurance	EFT	5646456		OK		\$100.00
06/25/2010	280	Steenis, Leah	Check			OK		\$5.19
03/03/2010	133	Steenis, Leah	Check			OK		\$10.00
02/25/2010	132	Steenis, Leah	Check			OK		\$50.00
02/23/2010	123	Steenis, Leah	Cash			OK		\$15.00
02/23/2010	120	Steenis, Leah	Cash			OK		\$100.00
02/23/2010	82	Steenis, Leah	Credit Card		Visa	OK		\$107.89
02/01/2010	16	ABC Insurance	Check			OK		\$100.00
<input checked="" type="checkbox"/> Active Only <span>Receive Payment</span>								
Refund History								

## 1.4 Demographics

### 1.4.1 Guarantor

The patient's own name will no longer show up in the guarantor drop down, the was becoming confusing when other members of the family shared the same name. The option will simply be "self".

## 1.5 Family/Contacts

### 1.5.1 Removing a Family Member who is a guarantor for another family member

An error message had been added that will prevent a family member from being removed from the family if that family member is set as the guarantor for any member of the family.

This will also occur if the family member being removed has a guarantor set.

The error message will contain the name and database id of the family member for whom the patient is a guarantor. Once removed that the guarantor for all applicable patients, the family member can then be removed from the family:

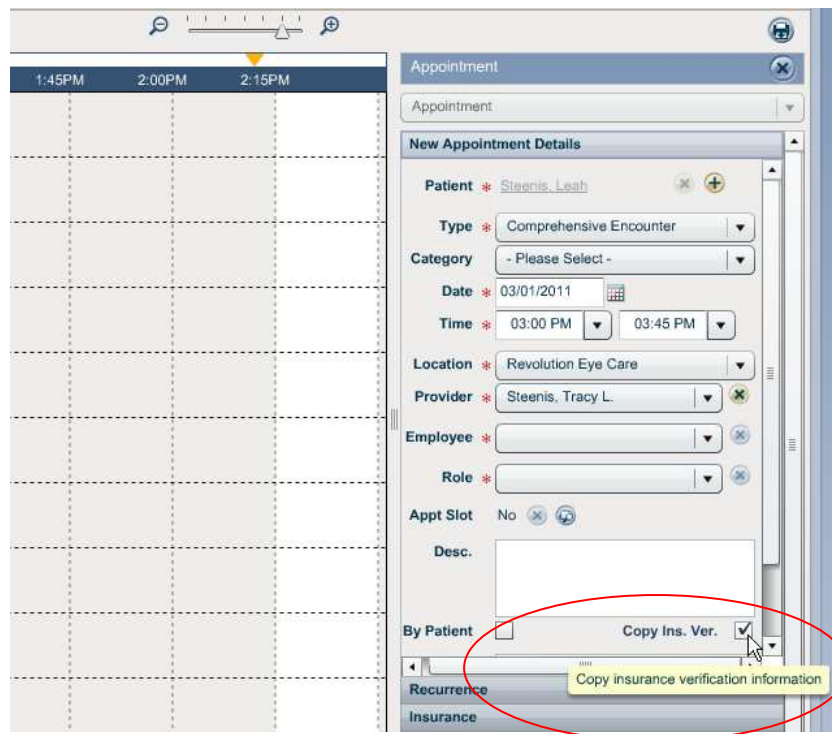


## 1.6 Scheduling

### 1.6.1 Insurance verification

A check box has been added to the reschedule details that will allow the user to pull forward insurance verification information when rescheduling an appointment.

By default this box will not be checked. Checking the box will trigger the app to pull forward the verification information to the new appointment:



## 1.7 Administration

### 1.7.1 Additional Access Permission settings


Additional Access Permission settings have been added to Accounting to allow or deny access to certain accounting reports. Prior to this release the access to reports was all reports or none.

The new options include the ability to view Sales, Receipts and/or Refund reports. If this permission setting is not selected, the user will still see the option for these reports but will not have access to the "Search" button in order to run the report.

A separate permission setting is also available for each type of report found in the "Other" reports category

Access permission settings are related to User Roles. To change an access permission setting go to Administration/Employee, Roles/User Roles. When a box is checked that allows the employee that has been assigned that user role access to the area selected.

**Important Note** You must check the box for "View Reports" even if you are only giving permission for certain reports. The checkbox for "View Reports" shows the choices for Sales, Receipts, Refunds and Other in the upper right corner of the Accounting Reports.



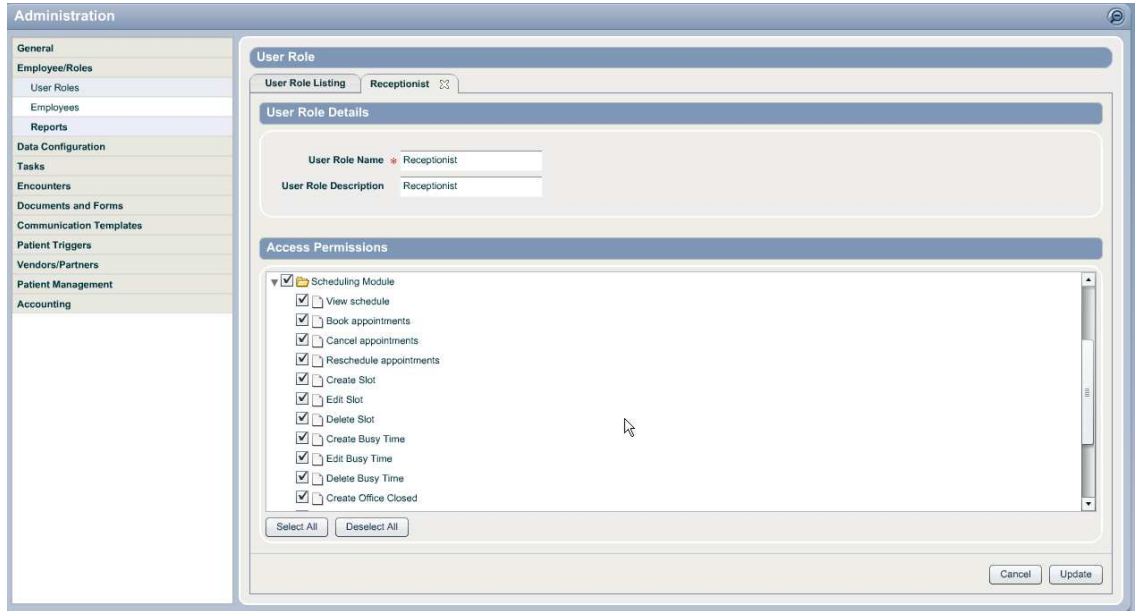
The screenshot shows a window titled "Access Permissions". Inside, there is a list of permissions with checkboxes. The following permissions are listed and checked:

- ☒ Remove Item
- ☒ View Reports
- ☒ View Sales Report
- ☒ View Receipts Report
- ☒ View Refunds Report
- ☒ View Unassigned Items Report
- ☒ View Aging Report
- ☒ View Deposits Report
- ☒ View Ledger Report
- ☒ View Ledger Posting Report
- ☒ View Ledger Daily Report

Below the list, there is a checkbox for "Administration Module" which is also checked. At the bottom of the window, there are two buttons: "Select All" and "Deselect All".

Additional access permission settings have also been added for Scheduling. Permission settings already existed for the actions available for appointments. These permission setting have been expanded to include all other calendar items.

Permission settings can now be specified to Create, Edit and Delete slots, busy time, office closed and employee hours



The screenshot shows the 'Administration' window with the 'User Role' tab selected. The 'User Role Listing' shows 'Receptionist' as the selected role. The 'User Role Details' section shows the 'User Role Name' and 'User Role Description' both set to 'Receptionist'. The 'Access Permissions' section shows a list of permissions for the 'Scheduling Module' with checkboxes for various actions like 'View schedule', 'Book appointments', 'Cancel appointments', etc. The 'Select All' and 'Deselect All' buttons are visible at the bottom of the permissions list. 'Cancel' and 'Update' buttons are at the bottom right of the window.

### 1.7.2 Deactivating Pharmacies

The ability to deactivate a pharmacy has been added. From Administration/Vendors, Partners/Pharmacies click on the appropriate pharmacy and use the "Deactivate" button in the bottom right of the grid

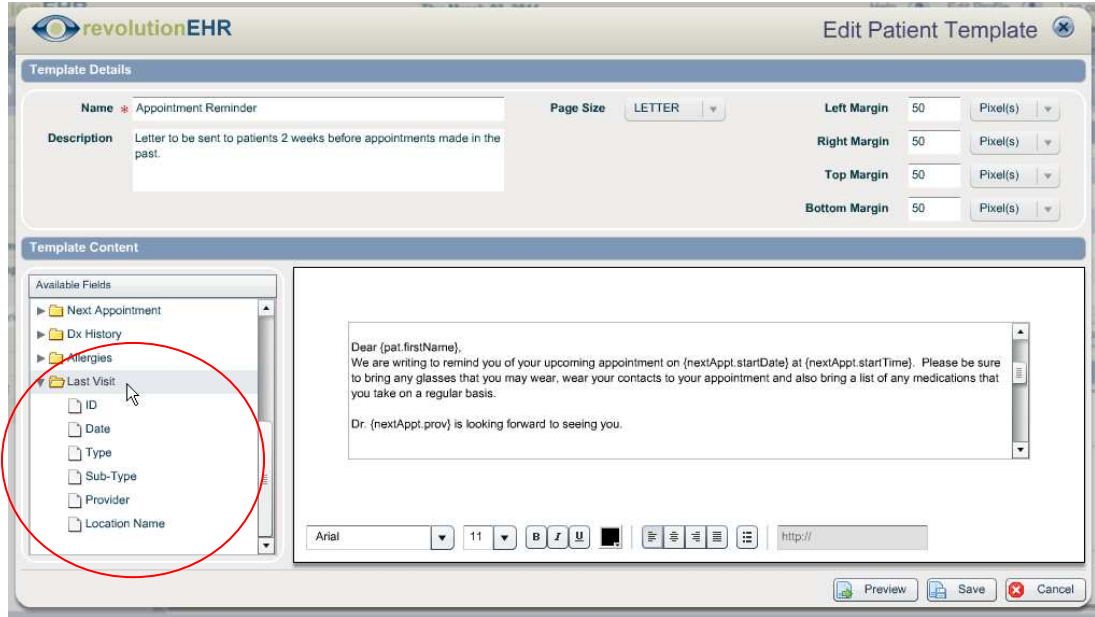


The screenshot shows the 'Pharmacy' window with the 'Pharmacy Listing' tab selected. A 'Filter by: Name' search box is at the top. Below it is a table with columns: Pharmacy, Location Name, Address, City, Zip/Postal, and Status. The table contains three rows of data for CVS, Walgreens, and Walgreens. At the bottom of the table, there is a checkbox for 'Active pharmacies only' and three buttons: 'Open', 'Add Pharmacy', and 'Deactivate'.

Pharmacy	Location Name	Address	City	Zip/Postal	Status
CVS	East Side Location	123 East Ave	Madison	53714	Active
Walgreens	Main St	123 Main St	Madison	53714	Active
Walgreens	North Ave	566 North Ave	Madison	53718	Active

### 1.7.3 Patient letter data fields

New data fields have been added for the Patient Letters to allow users to add merge fields to the patient letter for last exam information:



**revolutionEHR** Edit Patient Template

**Template Details**

Name: Appointment Reminder

Description: Letter to be sent to patients 2 weeks before appointments made in the past.

Page Size: LETTER

Left Margin: 50 Pixel(s)

Right Margin: 50 Pixel(s)

Top Margin: 50 Pixel(s)

Bottom Margin: 50 Pixel(s)

**Template Content**

Available Fields:

- Next Appointment
- Dx History
- Allergies
- Last Visit
  - ID
  - Date
  - Type
  - Sub-Type
  - Provider
  - Location Name

Dear {pat.firstName},

We are writing to remind you of your upcoming appointment on {nextAppt.startDate} at {nextAppt.startTime}. Please be sure to bring any glasses that you may wear, wear your contacts to your appointment and also bring a list of any medications that you take on a regular basis.

Dr. {nextAppt.prov} is looking forward to seeing you.

Arial 11 B I U

Preview Save Cancel

## 1.8 Inventory

### 1.8.1 The ability to put in a comment when reducing quantity on a stock item

Prior to this release the only way to manually reduce stock quantities was to go into the physical inventory item and just manually change the stock quantity.

A new button has been added to the Inventory Reports area to allow the user to select a physical inventory item and adjust the quantity while making a comment on that adjustment.

**Inventory Reports**

**Reports**

- Inventory
- Cost
- Aging
- Sales

**Inventory**

Location:  Category:  Filter:  Date:

[Advanced Search](#)

Manufacturer	Brand	Collection	Model	Color	Eye	Bridge	Temple	Inv. #	Inv.
Revolution Frames	Revolution Brand	Revolution Collector	R123	Blue	38.0	16.0	125.0 mm	1	
Revolution Frames	Revolution Brand	Revolution Collector	Revolution 1		0.0	0.0	0.0 null	2	Rev
More Frames Inc	XYZ Brand	XYZ Collection	XYZ 123	Brown	52.0	19.0	130.0 mm	3	
Revolution Frames	Revolution Brand	Revolution Collector	Revolution 1	Pewter	52.0	18.0	130.0 mm	96	
More Frames Inc			MF 6578	Blue	50.0	17.0	0.0 mm	131	
More Frames Inc			MF 6578	Brown	50.0	17.0	0.0 mm	132	
More Frames Inc			MF 6578	Green	50.0	17.0	0.0 mm	133	

Export Quantity History Receive Stock **Adjust Quantity**

Done

When using this button to reduce stock the number must be entered as a negative

**revolutionEHR** **Stock Adjustment**

**Manual Stock Adjustment**

Category: Eyeglass Frames

Product: R123

Item #: 1

Item Description:

Item UPC:

# Adjusted: -2

Comments: Returned under warranty

23 of 255 characters

OK Cancel

The comments entered when adjusting quantity can be seen using the "Quantity History" button



Type	Change	Cost	User	Date	Comments
Manual	-2		tsteen	03/01/2011 3:05P	Returned under warranty
Manual	1		tsteen	03/01/2011 3:04P	
Manual	3		jbecher	02/22/2011 8:39A	Found in understock
Sale	-1		tsteen	07/23/2010 7:12A	Invoice (297)
Receiving	1	\$39.95	tsteen	02/23/2010 7:23P	

## 1.9 General UI

### 1.9.1 Cursor focus

Whenever the product or services catalog is accessed to make a selection within the application (examples are adding an item to an invoice or selecting a contact lens product for a prescription) the cursor will now automatically be focusing in the "Model" field so the user can immediately start typing their filter criteria.

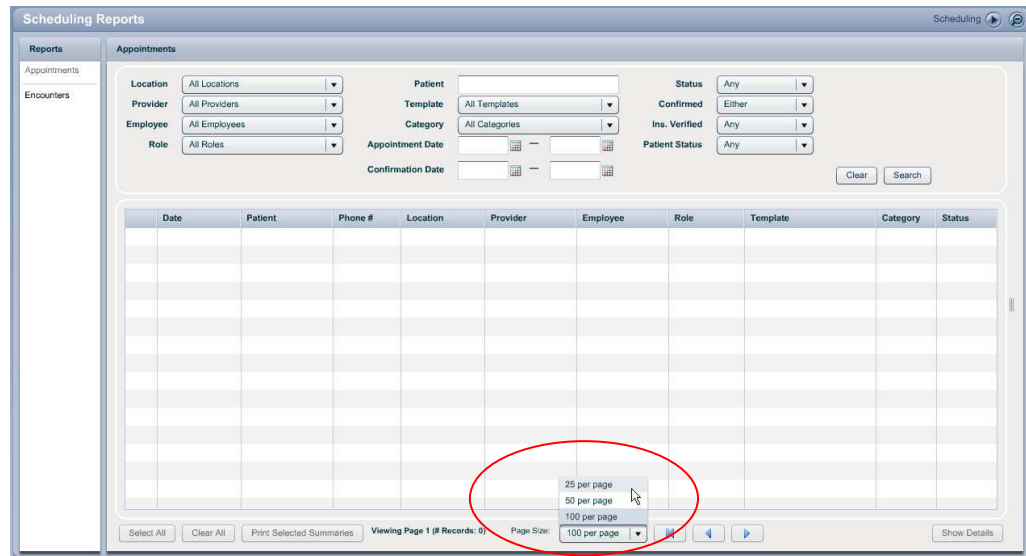
### 1.9.2 Paging is being added to several reports

In an effort to more efficiently return search results, the application is being enhanced to "page" these reports. This means that it will return only a certain number of these results in a single "page". When the user goes to the next page, the next set of results will be returned. So instead of waiting for the application to return a search with 300 results, the search screen will generate and display the first 25, 50 or 100 results (the user has the ability to select the number of results displayed per page) which will result in faster generation of the results. When going to the next page, the application will then generate and display the next 25, 50 or 100 results, and so on.

Paging will be used in the new "Patient Search" feature being added in this release and has been added to the Scheduling Reports. More search screens will be enhanced to display results in "paging" in future releases.

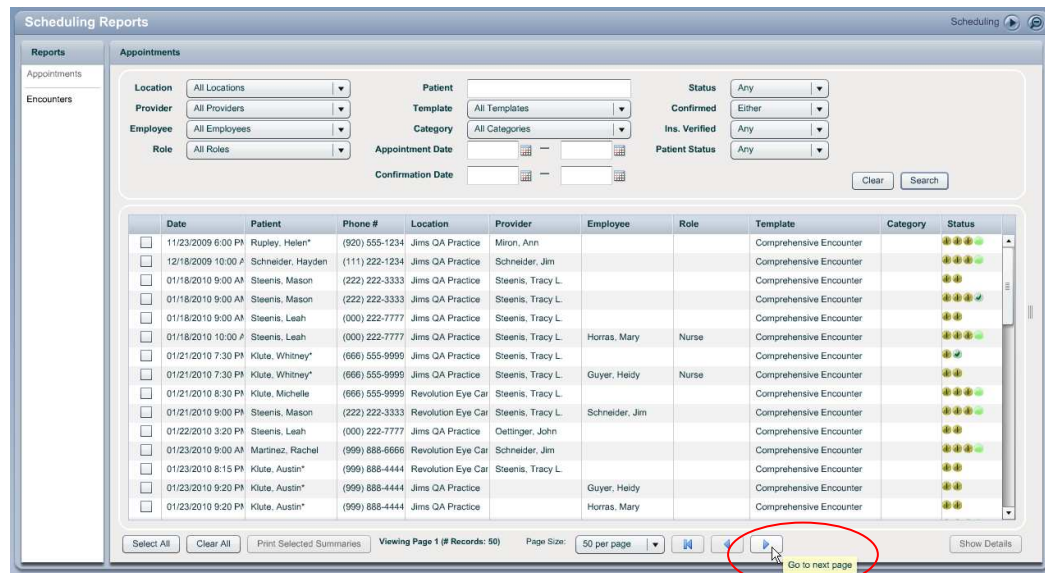
When running a search for a report that includes paging, the default on number of search results is 25. This can be changed to 50 or 100 from the "Page Size" drop down at the bottom of the grid





Once the search is run, the number of results displayed will be shown in the grid based on the page size that was selected for that search

To see the next set of results for that search, click the right arrow button to advance to the next page



Date	Patient	Phone #	Location	Provider	Employee	Role	Template	Category	Status
11/23/2009 6:00 PM	Rupley, Helen*	(920) 555-1234	Jims QA Practice	Miron, Ann			Comprehensive Encounter		
12/18/2009 10:00 AM	Schneider, Hayden	(111) 222-1234	Jims QA Practice	Schneider, Jim			Comprehensive Encounter		
01/18/2010 9:00 AM	Steenis, Mason	(222) 222-3333	Jims QA Practice	Steenis, Tracy L.			Comprehensive Encounter		
01/18/2010 9:00 AM	Steenis, Mason	(222) 222-3333	Jims QA Practice	Steenis, Tracy L.			Comprehensive Encounter		
01/18/2010 9:00 AM	Steenis, Leah	(000) 222-7777	Jims QA Practice	Steenis, Tracy L.			Comprehensive Encounter		
01/18/2010 10:00 AM	Steenis, Leah	(000) 222-7777	Jims QA Practice	Steenis, Tracy L.	Horras, Mary	Nurse	Comprehensive Encounter		
01/21/2010 7:30 PM	Klute, Whitney*	(666) 555-9999	Jims QA Practice	Steenis, Tracy L.			Comprehensive Encounter		
01/21/2010 7:30 PM	Klute, Whitney*	(666) 555-9999	Jims QA Practice	Steenis, Tracy L.	Guyer, Heidi	Nurse	Comprehensive Encounter		
01/21/2010 8:30 PM	Klute, Michelle	(666) 555-9999	Revolution Eye Car	Steenis, Tracy L.			Comprehensive Encounter		
01/21/2010 9:00 PM	Steenis, Mason	(222) 222-3333	Revolution Eye Car	Steenis, Tracy L.	Schneider, Jim		Comprehensive Encounter		
01/22/2010 3:20 PM	Steenis, Leah	(000) 222-7777	Jims QA Practice	Oettinger, John			Comprehensive Encounter		
01/23/2010 9:00 AM	Martinez, Rachel	(999) 888-6666	Revolution Eye Car	Schneider, Jim			Comprehensive Encounter		
01/23/2010 8:15 PM	Klute, Austin*	(999) 888-4444	Revolution Eye Car	Steenis, Tracy L.			Comprehensive Encounter		
01/23/2010 9:20 PM	Klute, Austin*	(999) 888-4444	Jims QA Practice		Guyer, Heidi		Comprehensive Encounter		
01/23/2010 9:20 PM	Klute, Austin*	(999) 888-4444	Jims QA Practice		Horras, Mary		Comprehensive Encounter		

The left arrow will take you back one page.

The button with a left arrow and a vertical line will take you back to the first page.



## 1.10 Security

A security feature has been added to deter someone from trying to guess at a user's password. If 5 log in attempts are made with an incorrect password, the log in for that user will be disabled. The account can only be re-enabled by someone in the practice with Administrative privileges. The disabled employee's password must be reset in the Administration Module in their employee file.

## 1.11 Orders

The eyeglass orders have been updated to allow the user to create an eyeglass order without selecting an eyeglass prescription. This has been added based on feedback requests by opticians that would like to start the order process before the patient's exam has been completed.

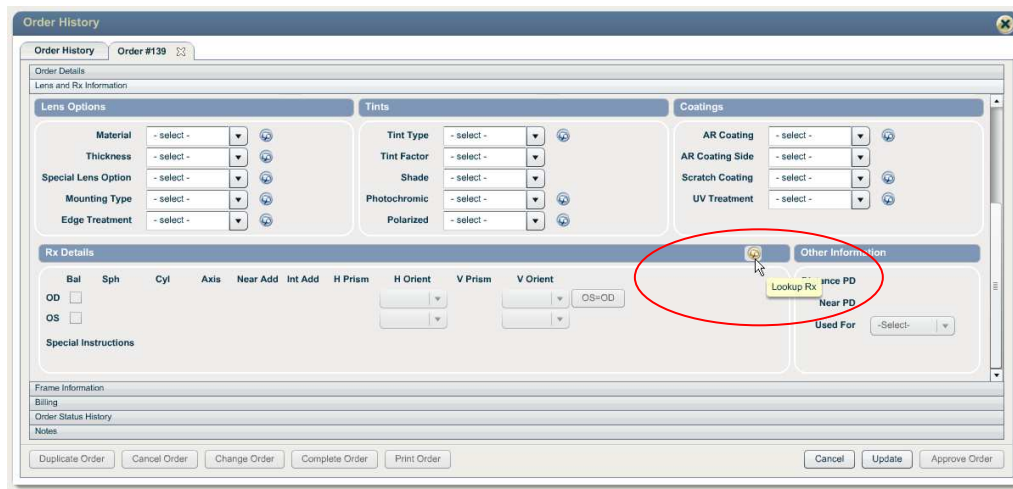
[illegible]

Enter the data into the new order as always.

Eyeglass orders without a spectacle rx associated can be "Approved" for billing purposes, but the "Transmit" button will not become active until an Rx has been added to the order.

To add or change an rx for an eyeglass order, click "Edit" in the bottom right corner.

In the "Lens and Rx Information" slider use the "Rx Lookup" button in the blue header bar for the "Rx Details" to select a prescription from the patient's Rx History list



The screenshot shows the 'Order History' window for 'Order #139'. The 'Order Details' section is expanded, showing 'Lens and Rx Information'. The 'Rx Details' tab is selected, and a red circle highlights the 'Rx Lookup' button in the blue header bar of the 'Rx Details' section. The 'Rx Details' section includes fields for OD, OS, Bal, Sph, Cyl, Axis, Near Add, Int Add, H Prism, H Orient, V Prism, V Orient, OS=OD, and Special Instructions. The 'Other Information' section includes fields for Ince PD, Near PD, and Used For.

Once an rx has been associated to the order and the order has been updated, the "Transmit" button will be activated.

## 1.12 Ongoing Care/Glaucoma

With the addition of CPT code 92133 for billing, we have enhanced the Glaucoma Ongoing Care screen to include information related to this service

### 1.12.1 Service History

Because not all patients will have had a service billed as 92133 at this time, the Service History grid will still reflect the most recent service as 92135. If the most recent billing has been for 92133, the service for a previous 92135 will no longer be considered the most recent billing on that service, and 92133 will be displayed in the grid with the appropriate service date.

If neither 92135 or 92133 has been billed then 92133 will be displayed in the Service History grid with no service date.

### **1.12.2 Glaucoma Management History**

The column header in the Glaucoma Management History grid has been changed to 92133. If a previous service was billed as 92135 it will still have a check mark in this column.

## **1.13 Marketing**

A new "Patient Search" feature has been added to the Marketing Module. A separate manual has been created to cover the step by step procedures for building and running a report using this new search option. The "Patient Search" manual was included as a separate link in the email for Release 5.2.0.

"Patient Search" will enable the user to create their own customized patient report using the search criteria that they designate. The report results are also configurable based on the type of data the user would like to see included in those results.

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## **2. Fixes**

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### **2.1 General UI**

#### **2.1.1 Tabbing**

Currently a delay will occur when using the tab button. This delay only affects the first tab done within a particular screen. While an application wide fix is not yet available, we have begun addressing this tabbing issue one area at a time. The following screens have been fixed and will no longer be affected by the tab delay:

- All screens within an encounter

Please send feedback or contact customer support if there are areas within RevolutionEHR that you frequently use and are still experiencing a tab delay on.

#### **2.1.2 Time formatting with double click**

Due to a formatting error, double clicking in a time field would not enter the time correctly if used between 12:00 and 12:59 pm. The formatting has been corrected for these times.

### **2.1.3 Opening orders automatically when first created**

A problem existed when users would hit the “create order” button from the Rx component or from within an encounter that would create the order but not automatically open that order. The user would be taken to the order history component but the new order would not open, and sometimes would not show in the history grid until refreshed.

This problem has been resolved and orders will again open automatically when the “create order” button.

### **2.1.4 Viewing the appointment details slider in the Scheduling Module**

In the Scheduling Module, when a user clicks on an appointment or any calendar item, the details are displayed in a slider to the right. Previously, that slider would “stick” and not open fully.

This was related to the animation used to make the screen appear to slide back and forth. The animation has been removed to prevent the slider from “sticking”.

## **2.2 Administration**

### **2.2.1 Patient Search**

Searching by date of birth in the Administration Module was producing results that were one day off. This issue has been resolved.

### **2.2.2 Address labels**

If trying to print address labels in the Administration Module/Patient Search screen when there are more than 1000 results available the labels are unable to be generated to the way the data is returned. This has been adjusted and labels should now be available when there are more than 1000 results returned on a patient search in the Administration Module.

## **2.3 Accounting**

### **2.3.1 Applying a write off from the Receive Payment screen**

When applying payments, the user has the ability to transfer a portion of the balance to “write off”. Occasionally the write off reason drop down would not activate when an amount was entered for the write off in the transfer pop up screen. This issue has been resolved.

### **2.3.2 Adding a \$0 item to an invoice with an overpayment**

Previously a problem would occur if the user added an item with no charge associated to an invoice that contained an overpayment. This would result in

a change to the \$0 balance on the invoice and the balance would show as negative. This problem has been fixed.

### **2.3.3 Sorting by columns for numbers in Accounting Reports**

When trying to click on the header bar in the Accounting Reports, the number columns would not sort appropriately. This has been fixed.

### **2.3.4 Amounts displayed for “Add Patient Portion”**

When a patient has an active insurance policy as well as an inactive insurance policy for the same insurance company, the “Add Patient Portion” button was displaying the copay/deductible/coinsurance amounts from the original policy that had been deactivated. This has been fixed and will display these amounts specific to the policy associated to the invoice.

### **2.3.5 Transferring the full balance with the new transfer items button**

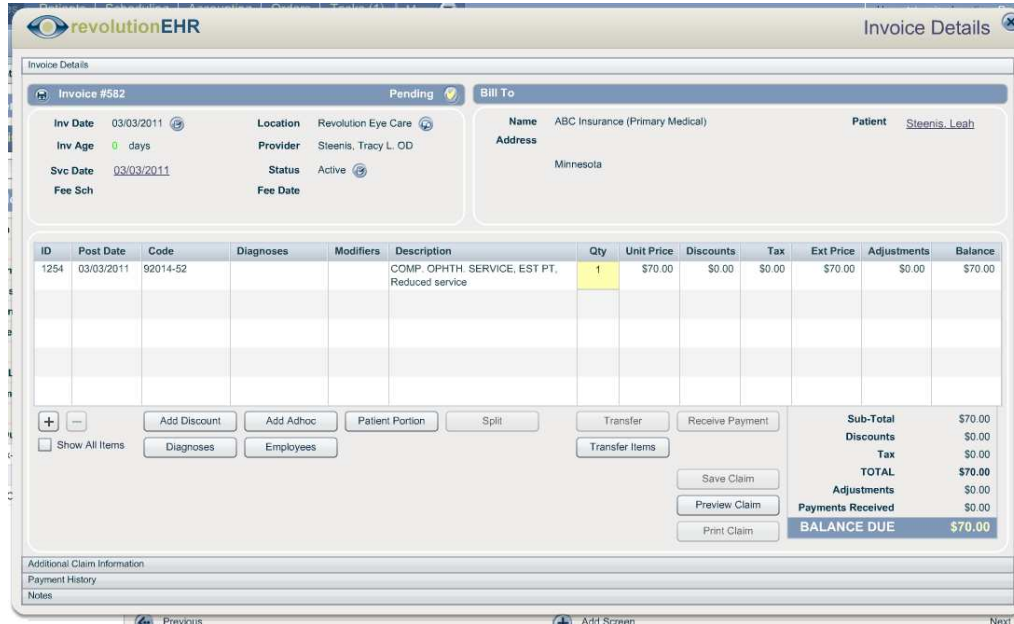
When using the new “Transfer Items” button on a pending invoice and transferring the full balance of that invoice the invoice will get marked as paid but was not getting updated to an authorized invoice. This prevents the user from being able to print the invoice.

This has been changed to automatically authorize the invoice before updating the status to paid when transferring the full balance.

### **2.3.6 Invoice layout**

In the last release, the addition of the transfer items and discount items buttons increased the overall size of the invoice which caused the user to have to scroll horizontally if viewing the invoice as a pop up in an encounter or order.

The layout of the action buttons within the invoice has been adjusted slightly to accommodate the normal size of the invoice.



## 2.4 Scheduling

### 2.4.1 Scheduling Reports

A problem existed when running a Scheduling Report with a start and end date specified. The result in the report would include appointments from noon on the start date through noon on the end date. However appts prior to noon on the start date or after noon on the end date would not be included in the report. This issue has been resolved and Scheduling Reports will now display results appropriate for all appointments on the start and end date.

### 2.4.2 Event Details

When clicking on an event in the Scheduling Module (Appointment, Slot, Busy Time, Office Closed or Employee Hours). The slider on the right that displays the details for that even would not always open, or would open partially, and the user would have to manually slide it open. This has been fixed.

### 2.4.3 Appointment Comments

An issue existed where a user would enter comments into the open text field within the appointment details slider in the Scheduling Module. If the user hit the "enter" key to type more text on an additional line, the first save would look correct. If those comments were edited and updated again, the text would all move up to the first line.

This issue has been resolved, and the comments will save as entered.

## **2.5 Orders**

### **2.5.1 Orders Search Screen**

When a list is created in the Orders Module and one or more of the orders in that list is opened and the status of that order is changed, the status displayed in the list was not updating until the user did a new search.

This has been fixed and the list will show the updated status automatically

## **2.6 Encounters**

### **2.6.1 Prescription Refill**

The “refill” button was not working within an encounter. This has been fixed and refills can now be done from the encounter as well as the Rx component.