RevolutionEHR

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RevolutionEHR Release 5.3.1

Release Notes

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Overview

Along with many small enhancements and fixes, this release includes new efficiencies in the coding screen within an encounter, and also the ability for offices to set their own "practice preferences" without requiring assistance from Revolution.

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1. Enhancements

1.1 Coding

Two changes have been made to the coding screen of the encounter.

The first is the ability to build a list of "Common Services" that can be used to code an exam with a simple drag and drop or "add" button.

The second is a more efficient way to associate diagnosis codes to the services within the coding screen.

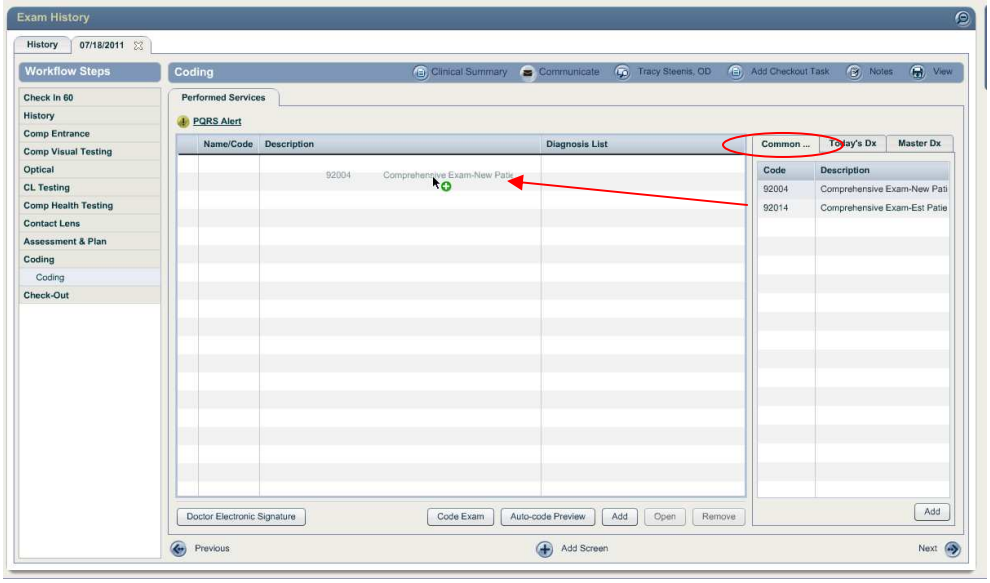
These enhancements are outlined in section 1.1.1 and 1.1.2 respectively.

TIP: *Both of these features allow the user to add items from one grid to another. The ability to select multiple items is also available. It is the standard option for multi-select which requires the user to hold down the "ctrl" key on the keyboard while clicking with the mouse on each individual item you wish to add. Each item will highlight, and when you drag one of those items, all will be pulled over.*

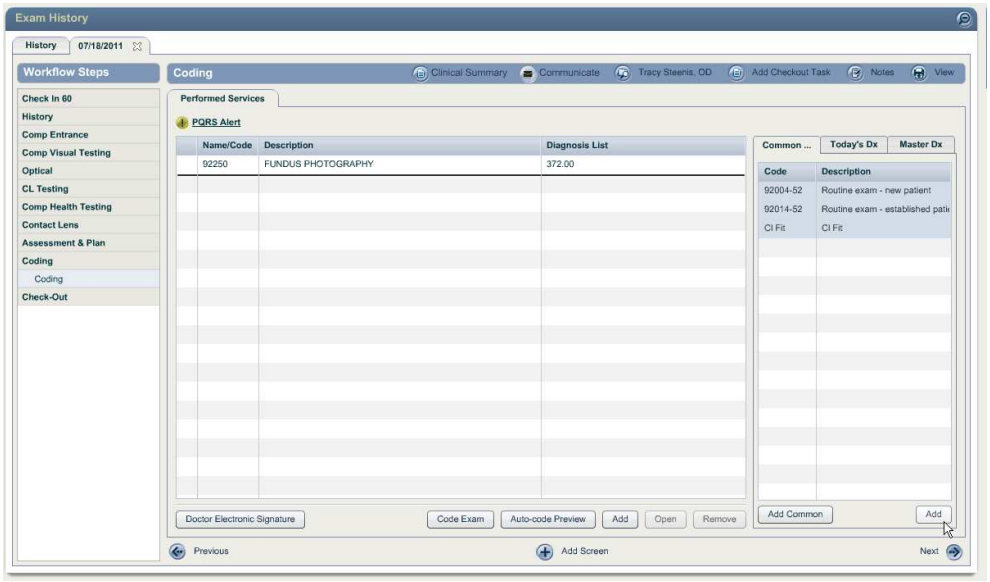
1.1.1 Common Services

A new feature has been added that will allow the user to configure a list of "Common Services". These services will be displayed on the right in the coding screen of every encounter.

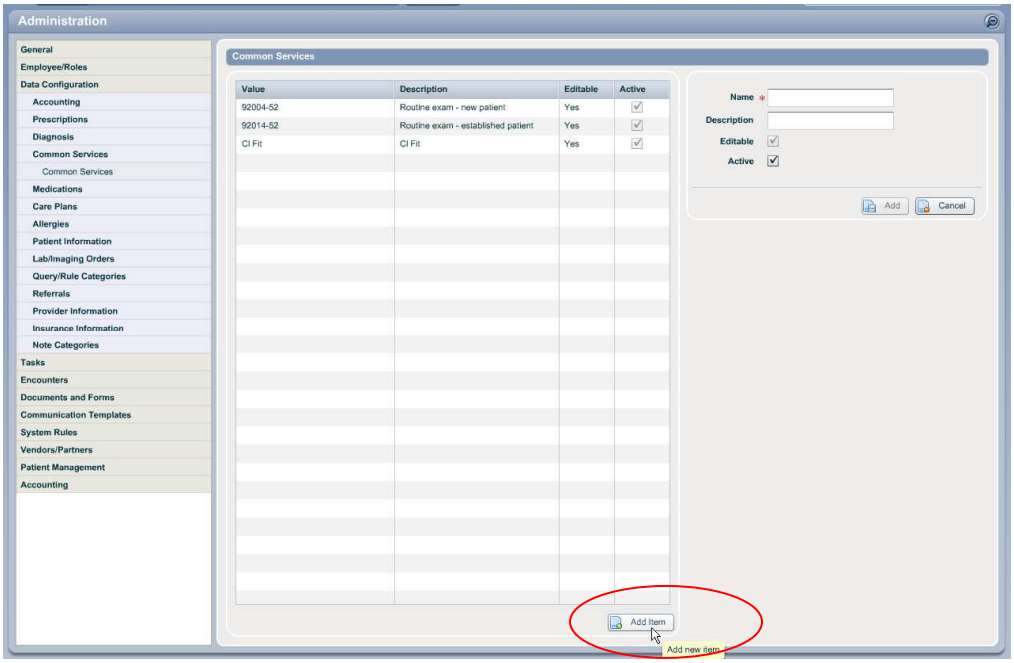
Options for selecting "Common Services"
The user may simply drag and drop the "the appropriate service(s) from the grid on the right to the grid on the left. Remember that ctrl + click will allow you to select multiple services at one time:



You may also highlight the appropriate services in the "Common Services" grid on the right and click the "add" button below to add all selected services to the grid on the left:



To set up a "Common Services" list for your practice go to Administration/Data Configuration/Services/Common Services
Click "Add Item" at the bottom of your screen



In the "Name" field to the right type in the name of the service exactly as it appears in Inventory. **The exact match on name is required because each location has the ability to configure their own list of services in Inventory**. Because the "Common Services" list is used by all locations for your practice, the "Name" of that service is used to select the appropriate service from Inventory when coding the exam.

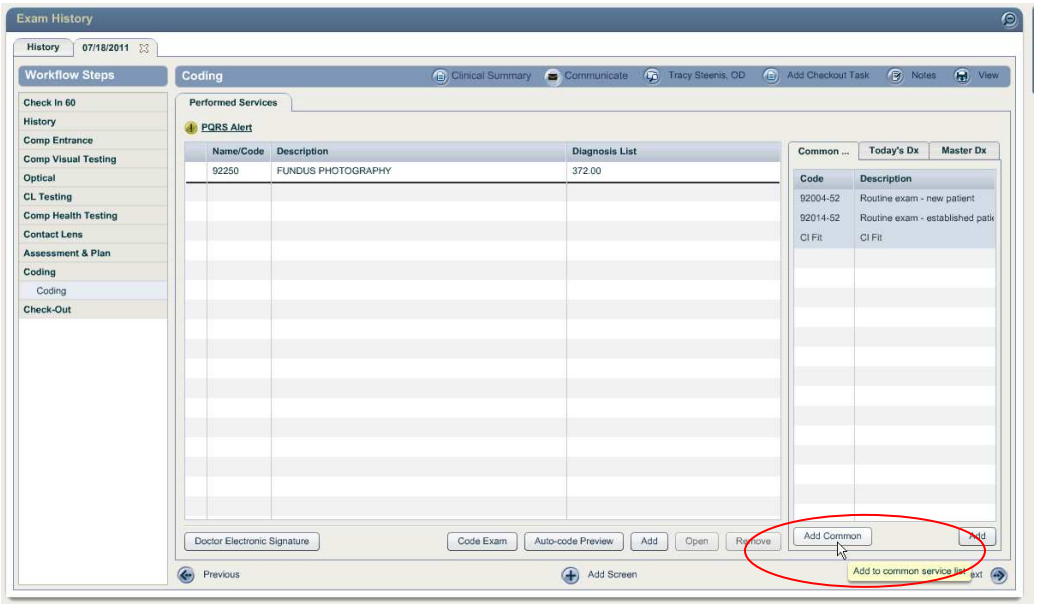
For "CPT Services" this is straightforward as the "Name" for those services is the CPT code and cannot be altered by the user. **Important Note:** *If the CPT Service is configured in Inventory with a modifier, then the "Name" set up in the "Common Services" list must be entered as the CPT Service with a hyphen, followed by the modifier.* For example, if you have 92014 set up in Inventory with a 52 modifier you would entered that as 92014-52 (no spaces) as the "Name" in "Common Services".

For "Other Services" extra care must be taken to exactly match the name of the "Other" service as it appears in Inventory. For multi-location practices, this may require that you update some of the names you have designated for "Other" services for each location. For example if location A has a spherical contact lens fitting service set up in Inventory as "92310 Sph fit" and location B has the same service set up as "92310 Spherical fit" you must edit the name for one of the locations so that they match. In the example given, if you update location B to "92310 Sph fit", then in your "Common Services" list you would set up the common service as "92310 Sph fit" so that regardless of

which location the service is coded at, it will pull the appropriate service from Inventory.

If your "Common Services" list contains a service who's "Name" does not match any CPT or other services for the location where the Common Service is being used, an error message will appear when trying to use that code for an encounter:

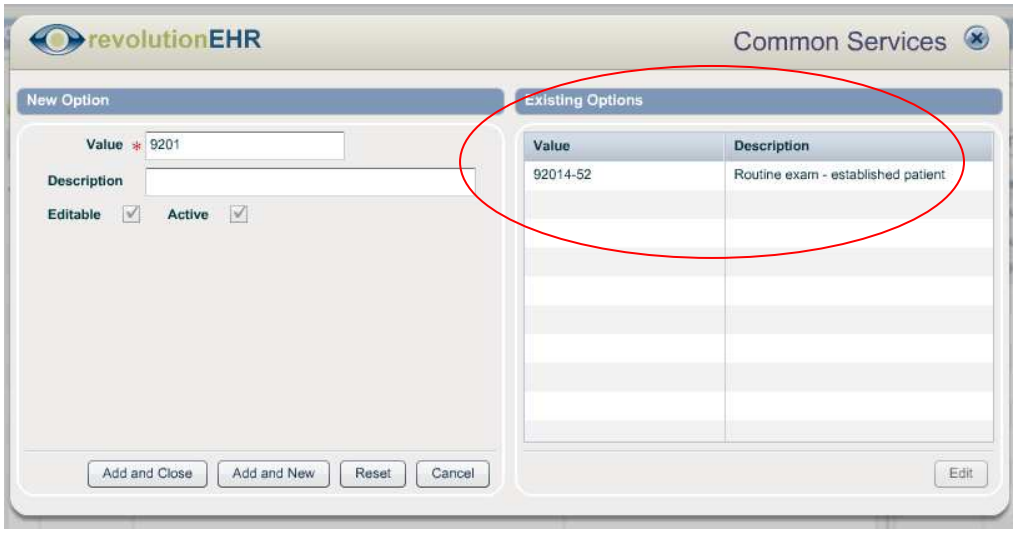
"Common Services" may also be added to your master list "on the fly" from the encounter. In the "Common Services" grid within the coding screen of an encounter there is an "Add Common" button:



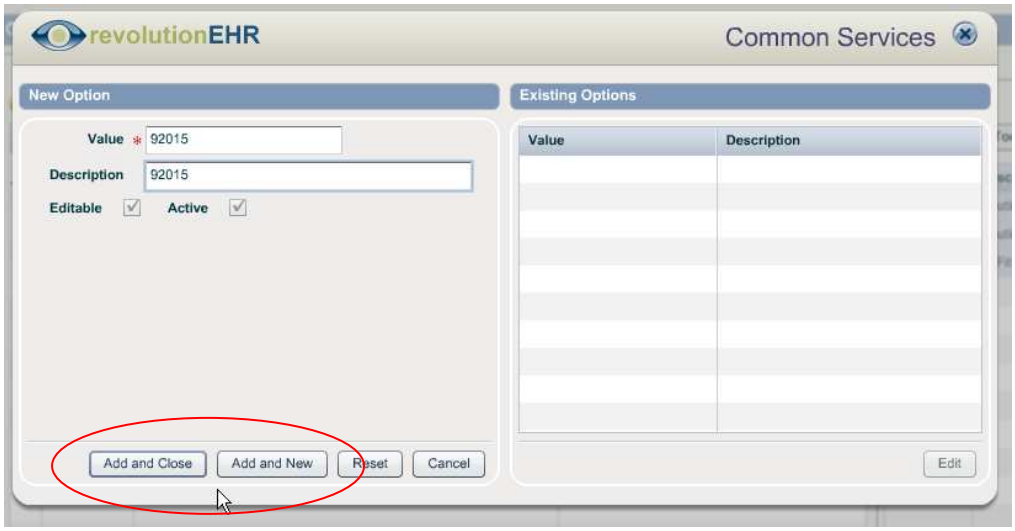
Clicking that button allows you to add a new service to your "Common Services" master list. All the rules listed above for adding a common service using this feature still apply.

As you type the "name" of the new common service, the grid on the right in the new pop up window will display any existing common services that match

the new service you are adding. This is designed to help eliminate any duplicate services from being created



After entering the appropriate name and description for the new common service, and verifying that no "Existing Options" exist, you may select "Add and Close" if that is the only service to be added, or select "Add and New" if there are more services you wish to add at that time:



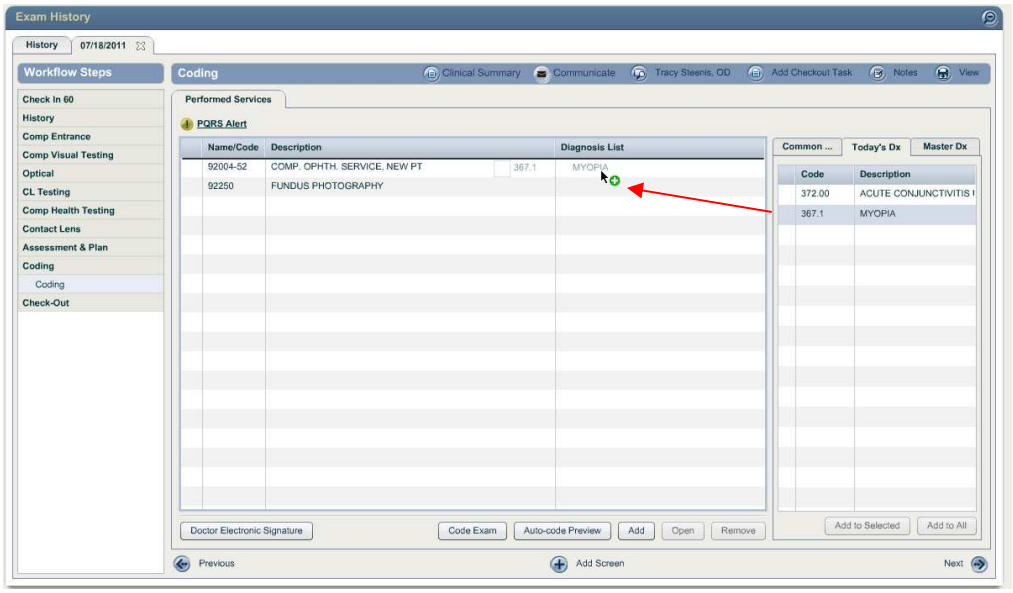
1.1.2 Associating a diagnosis

A more efficient way of associating diagnosis codes to service codes has been added to the coding screen. Users may now drag and drop diagnoses to the appropriate service code(s).

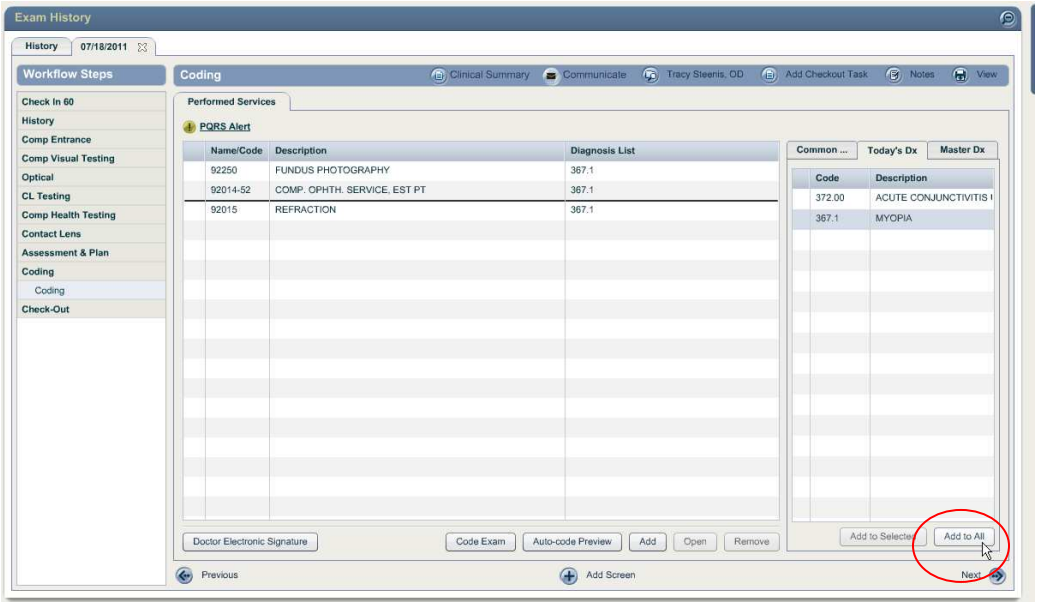
There are two tabs available in the grid to the right of the coding screen: "Today's Dx" and "Master Dx".

Options for associating diagnosis codes to service codes
Click on the appropriate tab and drag and drop the diagnosis to the appropriate service code on the left. Remember that ctrl + click will allow you to select multiple diagnoses at one time.

A green + button will appear when the diagnosis is read to be dropped. You must drop it onto the desired service code. A dark black line will appear above the code to which the diagnosis will be associated when dropped:

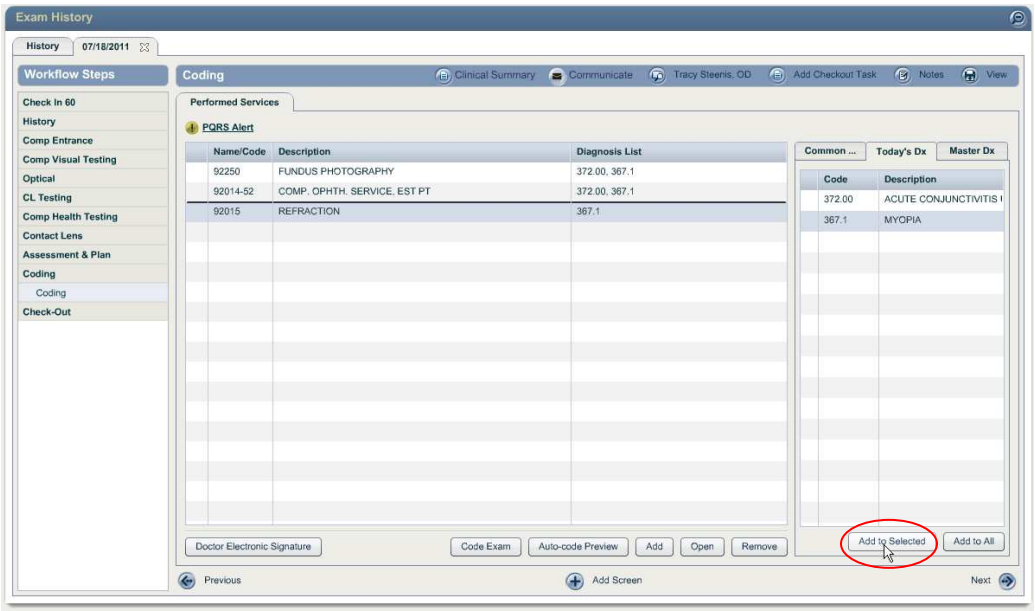


To add diagnoses to "all" service codes listed to the grid on the left, highlight the appropriate diagnosis or diagnoses in one of the diagnosis grids available on the right, and click the "Add to All" button below to add the selected diagnoses to all services for that encounter:



To associate diagnoses to "selected" service codes, first click to highlight the appropriate services codes in the grid on the left, and then click to select the appropriate diagnosis codes in the grid on the right (remember that you may use ctrl + click to select multiple items in each grid). Click "Add to Selected" to associate the selected diagnosis codes to the selected services.

If no services have been selected the "Add to Selected" button will be inactive.



When using the "add" button to add a service code, we still allow the user to associate the diagnosis codes as you always have.

1.1.3 Button name change

Please note that we have changed the label on the button that currently says "Code Exam Test". This terminology was causing some confusion as to the use of that button. For that reason, we have changed the label to say "Auto-code Preview"

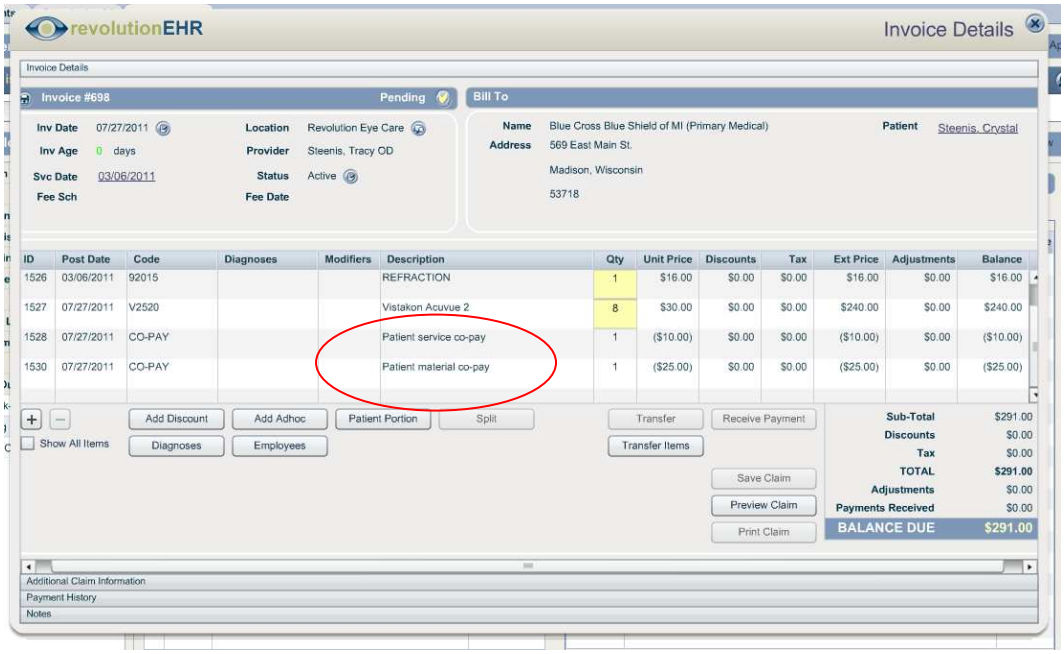
The functionality of this button remains the same.

1.2 Accounting

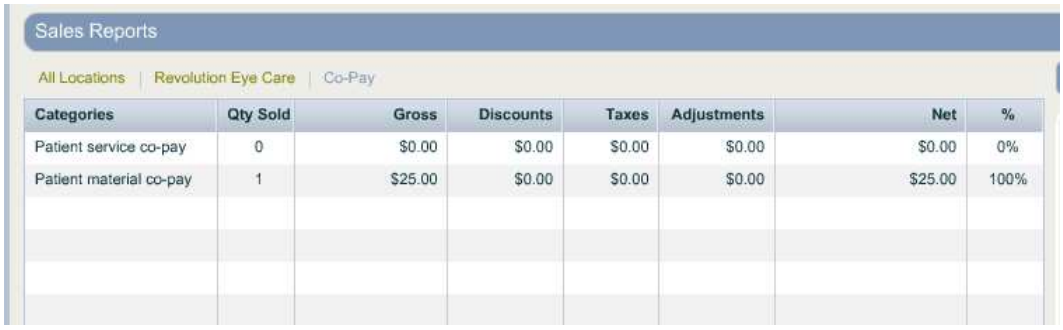
1.2.1 Patient Portion

When using the "Patient Portion" button within an insurance invoice the user has the option to apply a "service" or "materials" copay. Previously this would display simply as a "copay" line item on both the patient and insurance invoices with no reference to service or material.

This has been changed to reflect separate line items for "service" and/or "material" copays that are added using the "Patient Portion" button.



This will also be reflected in the Sales Reports. There will be separate lines for "Service Copay" and "Materials Copay".



Categories	Qty Sold	Gross	Discounts	Taxes	Adjustments	Net	%
Patient service co-pay	0	$0.00	$0.00	$0.00	$0.00	$0.00	0%
Patient material co-pay	1	$25.00	$0.00	$0.00	$0.00	$25.00	100%

This will not alter historic invoices or sales reports, but will apply from the day of the release forward.

1.2.2 Transfer Items

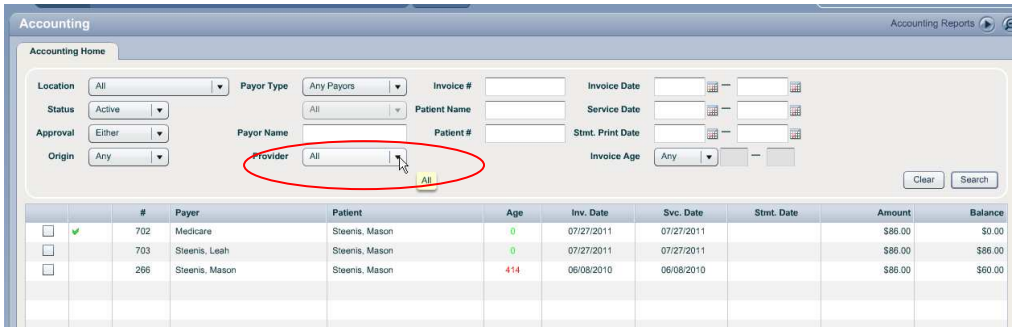
Previously when using transfer items to transfer to full balance of each item to the patient from an unauthorized insurance invoice, the insurance invoice would automatically be authorized and marked as paid. This would cause problems in offices that have a specific billing person reviewing the pending insurance invoices prior to authorizing and sending the claim.

We have adjusted this action so that transferring the full balance of an unauthorized insurance invoice will leave that invoice unauthorized and active.

If the insurance invoice was authorized prior to transferring the full balance, the invoice will still automatically be updated to "paid".

1.2.3 Accounting search

A new field has been added to the criteria available for searching in the Accounting Module. This new field is for "Provider" and will allow the user to search for invoices associated to a specific provider. The drop down will default to "All"



1.2.4 Invoice select and deselect

A new feature has been added to the Accounting Module that will allow users to select or deselect specific invoices when using the action buttons at the bottom of the grid

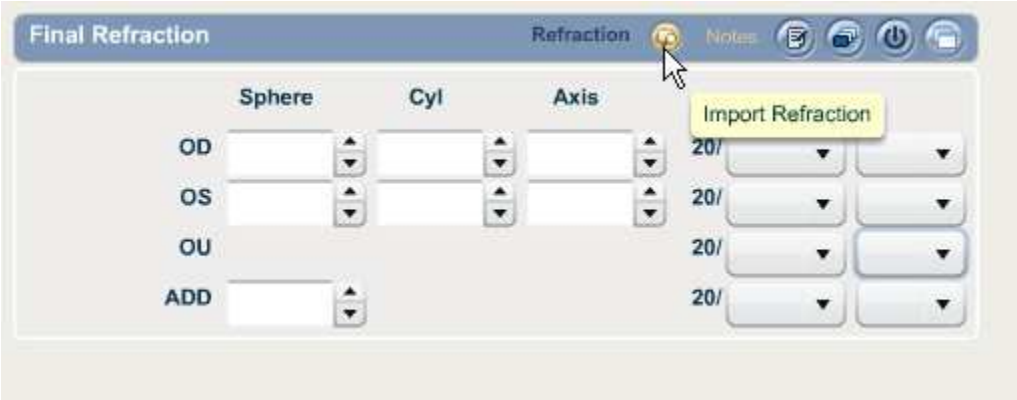
New checkboxes found to the far left of the invoice results grid can be checked or unchecked as needed before using the actions buttons. However, if any of the checked invoices are not eligible for the desired action, the action button will be grayed out. For example if an unauthorized invoice is checked, the user cannot use the "print statements" button as only authorized invoices appear on statements. The following is a list of actions and the rules that apply to each:

- Print Invoice: This action button is not associated to the new checkboxes. Because this button will only print a receipt for one invoice you will still select that invoice by clicking on the line itself to highlight and then hitting "Print Invoice". The checkbox does not determine which invoice gets printed.
- Print Statements: Only authorized invoices can be selected when printing statements
- Print Summaries: There are no restrictions on this action. The summary printed will include any selected invoices.

1.3 EHR

1.3.1 Import Refraction

All "Refractive" tests contain an "Import Refraction" button:



The pop up window displayed when using this button has been enhanced to also include the patient's eyeglass prescription history list. This has been added as a new "tab" in that window for "Eyeglass Rx's".

By default the "Refraction Tests" tab will be displayed when using the Import Refraction button, but the option to select "Eyeglass Rx's" is now available:

Rx Date	Exp Date		Sphere	Cyl	Axis	Near Add	H Prism	V Prism
07/07/2011	07/07/2013	OD OS						
06/30/2011	06/30/2013	OD OS	-4.75 -4.75	-1.50 -1.50	180 180			
06/09/2011	06/09/2013	OD OS	Balance -0.50	-0.50 -0.50	179 179	9.75 9.75	14.75 BO 14.75 BO	14.75 BD 14.75 BD
06/09/2011	06/09/2013	OD OS	Balance -0.50	-0.50 -0.50	179 179	9.75 9.75	14.75 BO 14.75 BO	14.75 BD 14.75 BD
06/09/2011	06/09/2013	OD OS	-4.75 -4.75	-1.50 -1.50	180 180			
05/19/2011	05/19/2013	OD OS	-2.50 -2.50	-2.25 -2.25	180 180			
05/04/2011	05/04/2013	OD OS	-2.75 -3.50	-0.50 -0.50	180 090			
03/07/2011	03/07/2013	OD OS	-4.75 -4.75	-1.50 -1.50	180 180			
03/06/2011	03/06/2013	OD OS	+1.25 +1.50					
03/04/2011	03/04/2013	OD	-4.75	-1.50	180			

This will now allow the user to import another refraction test from that encounter *or* a previous Rx.

Important Note: *Not all refractive tests have the same available fields as you will find within an actual Rx. Only data for matching fields will be pulled when importing an eyeglass Rx or when importing from one refraction test to another.*

If importing from an rx that has different "Add" findings for OD and OS into a test with only one "Add" field, the OS add will be imported by default.

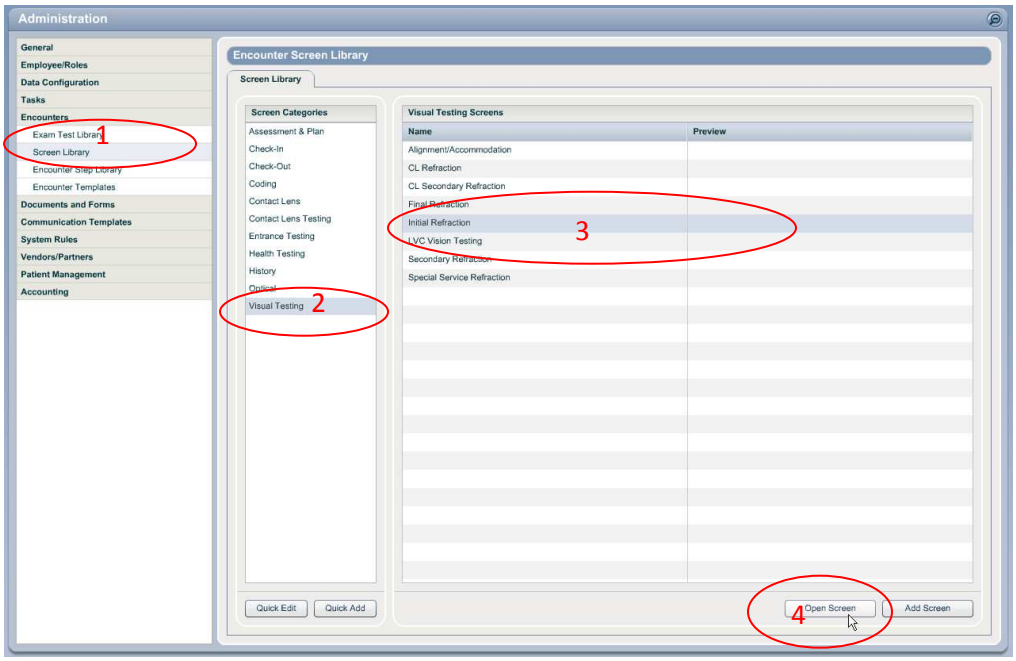
1.3.2 New "Historical Rx" test

A new test has been added to the Exam Test Library for "Historical Rx". This new test will have the same "Import Refraction" button. However, when using "Import Refraction" for the Historical Rx test, the default tab displayed will be the "Eyeglass Rx's" tab.

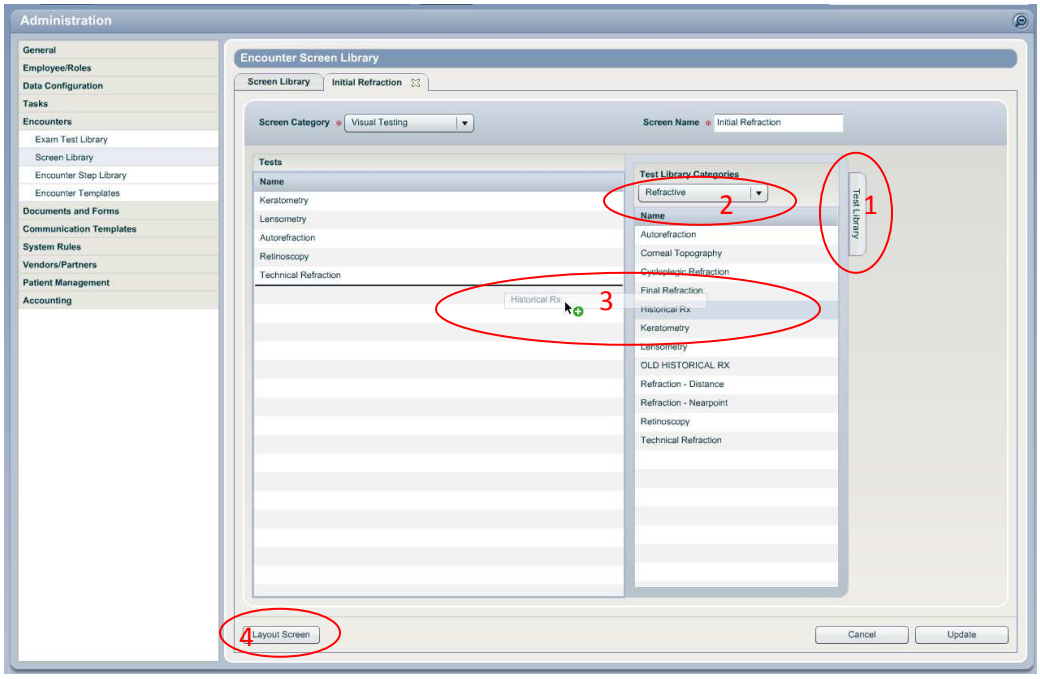
Important Note: *If you have been using the Lensometry test to record historical Rx information, we strongly encourage you to now use the new Historical Rx test. When viewing the encounter print out, the label for the Lensometry test is "Lensometry". Someone from the outside viewing this print out will assume that the data contained in the Lensometry test is the actual lensometry reading and not simply a copy of the historical Rx.*

To add the Historical Rx test to your encounters, first decide in which "Screen" you would like this test to appear. In the following example we will be adding the test to the "Initial Refraction" screen.

- Go to Administration/Encounters/Screen Library
- Select the appropriate screen category
- Open the appropriate screen

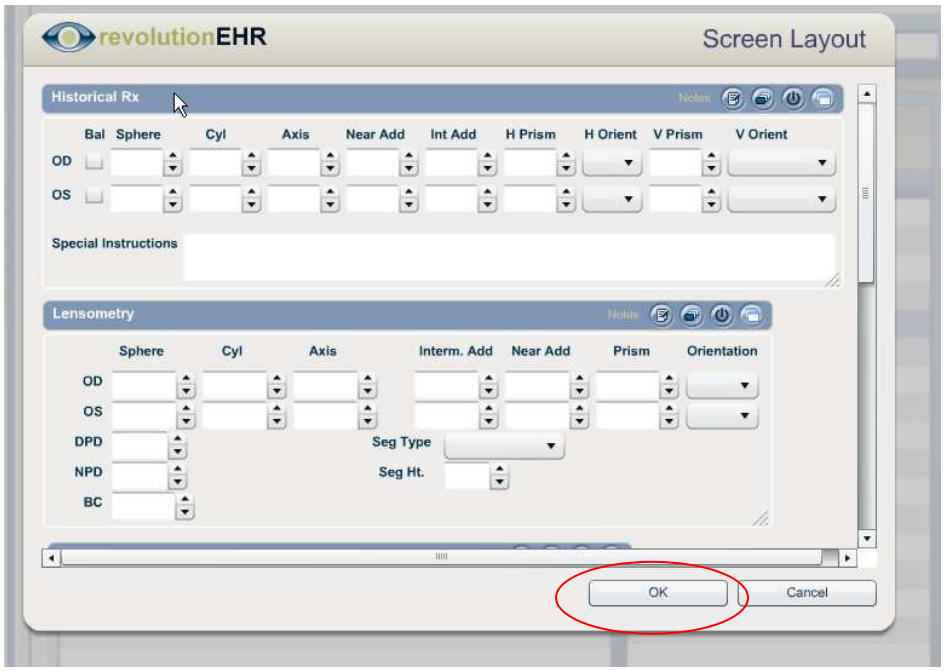


- Click "Edit" in the bottom right
- Click on the sideways "Test Library" tab
- Select "Refractive" from the "Test Library Categories" drop down
- Drag or click the green + to move the "Historical Rx" test to the Tests grid on the left
- Click "Layout Screen"

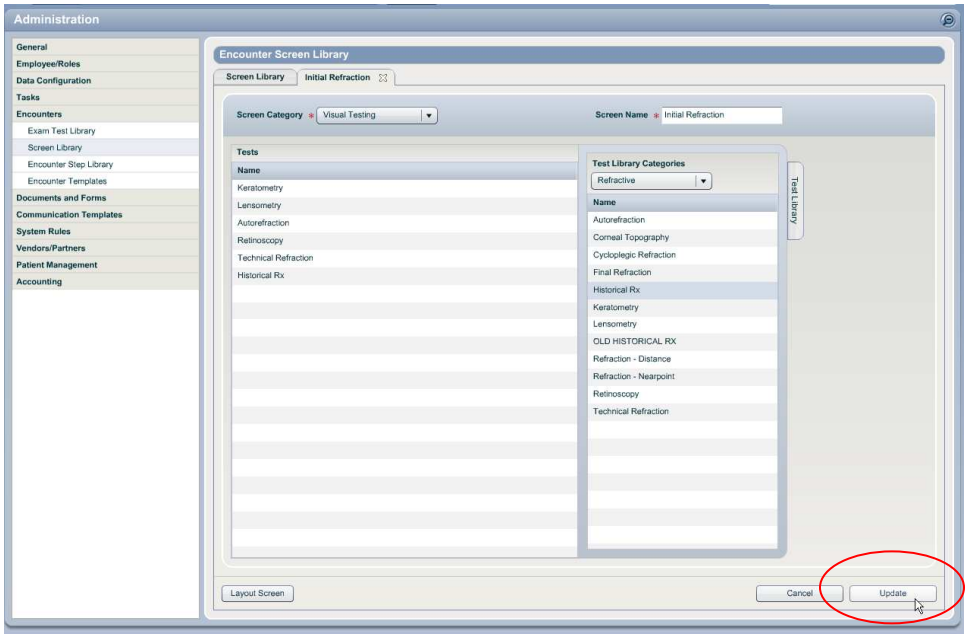


Tip: *When adding or removing tests in a screen it is import to adjust the screen layout. Adding a new test will simply add that test to the upper left corner of the screen, and will cover any existing tests in that screen. Removing a test from a screen will leave a gap in the screen where the test was located prior to being removed*

- Click on the blue header bar of any test to move it around in the screen layout pop to adjust the layout of those test within the screen
- Click "OK"

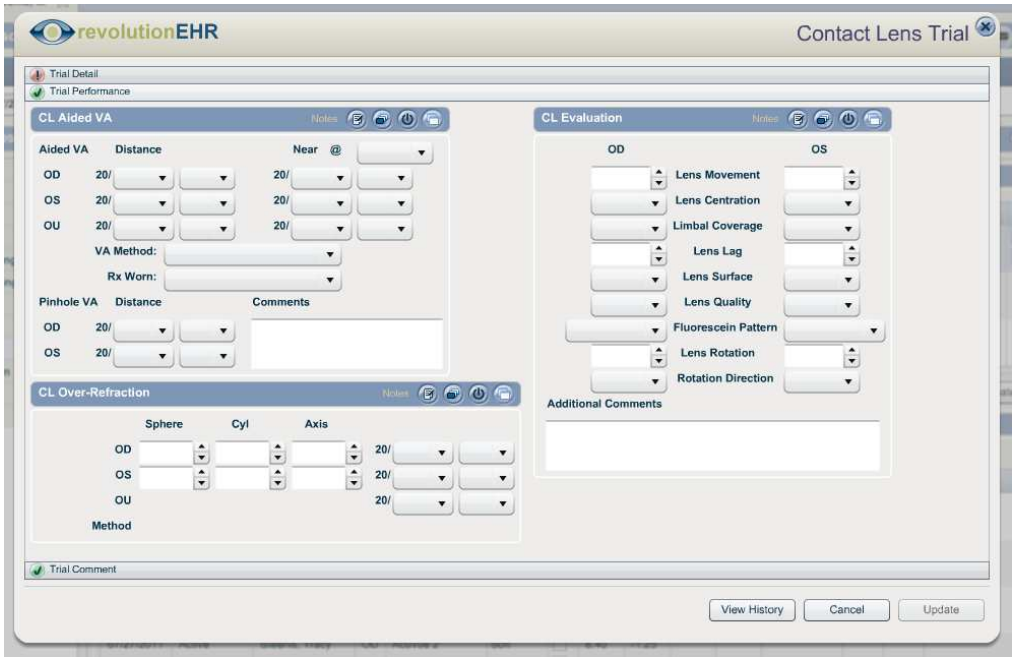


Click "Update" to complete



1.3.3 CL Trials

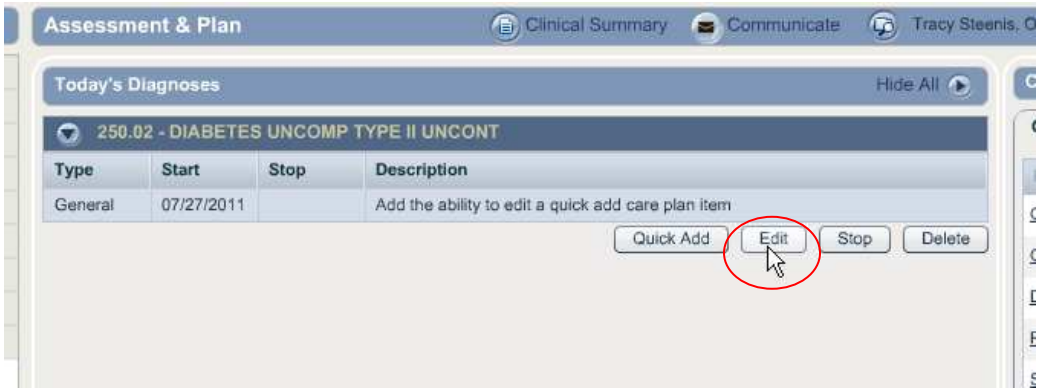
The "Trial Performance" slider found within the pop up when creating a new CL Trial Rx has be changed to allow all of the tests in that slider to be viewed without having to scroll



1.3.4 Edit Quick Add Care Plans

The ability to edit a care plans has been added. This feature is available for items from the Care Plan library as well as Quick Add items. If editing an item from the library, please note that the edit only applies to that encounter. The item in the Library will remain unchanged.

To edit a care plan simply select the appropriate item and hit "edit"

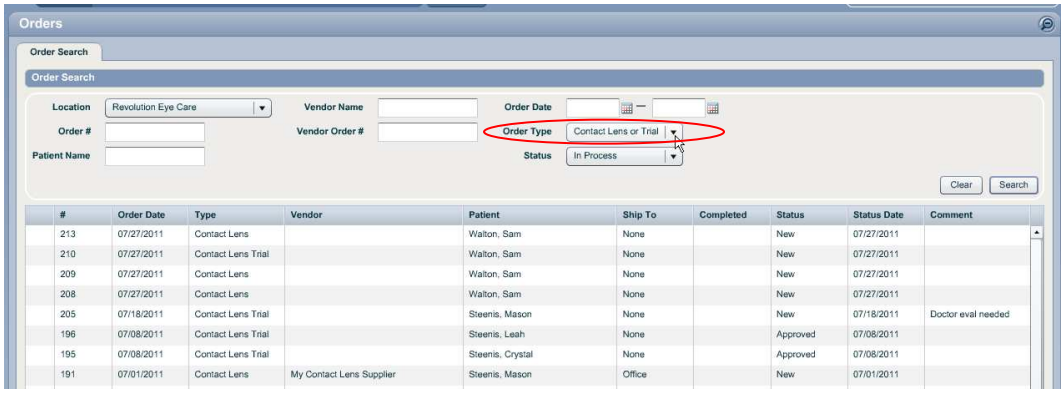


Also added to the "Quick Add" items is spell check.

1.4 Orders

1.4.1 Order Search

A new "Order Type" option for "Contact Lens or Trial" has been added to the drop down. This new option will allow users to search for "all" contact lens orders for revenue and trials in the same search.



1.4.2 Orders will open in edit mode

Previously when new orders were created or an editable order was opened the user would have to first click "edit" in the bottom right to make changes.

This has been enhanced so that any new order that is created or any editable order that is opened will automatically be opened in "edit" mode so that the user may begin entering data right away without the extra click.

1.5 Administration

1.5.1 Encounter Duration

In the original design of RevolutionEHR, the intent was to allow users to scheduled appointments as "resource based" scheduling. Meaning that each workflow step would be assigned a "resource" (receptionist, tech, doctor, etc), and appointments could be booked based on the availability of each resource. For that reason, the "duration" was associated at the "step" level.

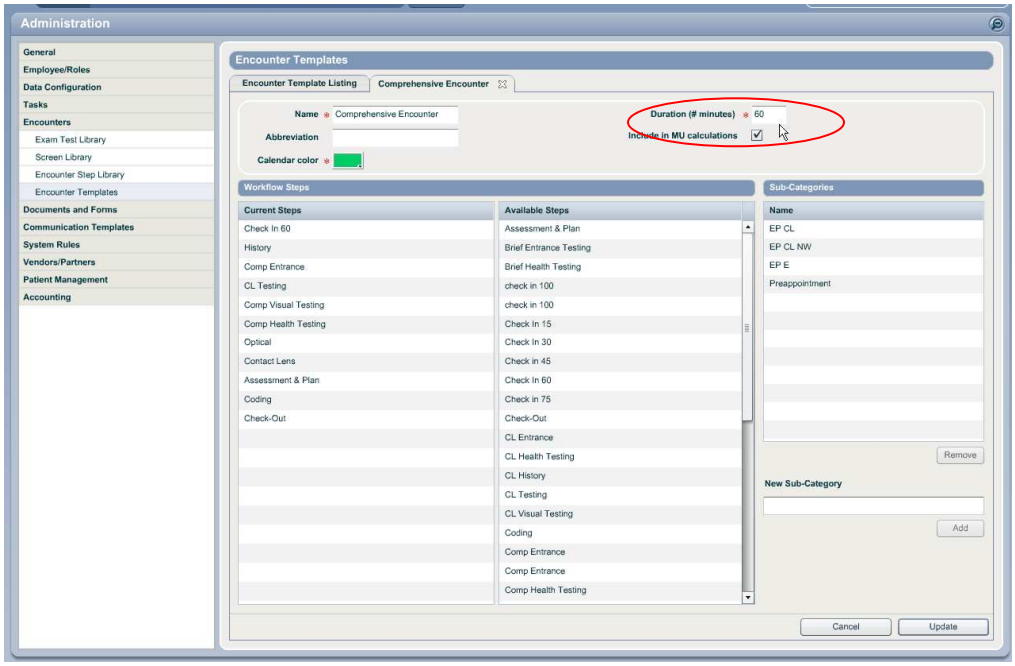
Based on user feedback, we moved away from the original plan of resource based scheduling and added appointment "slots" to allow the user to configure specific available times in their scheduled based on start and end times instead of resource availability.

Due to the duration being applied at the workflow step level, many users were creating a "work-around" where they set all workflow steps to 0 for duration except for a few key steps that were used to control the encounter duration.

In an effort to remove the need for that work-around, we have move the ability to set an encounter duration at the encounter template level.

In Administration/Encounters/Step Library you will find that there are no longer duration times associated to workflow steps.

In Administration/Encounters/Encounter templates, you may now control the encounter duration directly from the template.



In this change, all current encounter durations were saved and pulled forward to this new duration field.

1.5.2 "From" Email Configuration

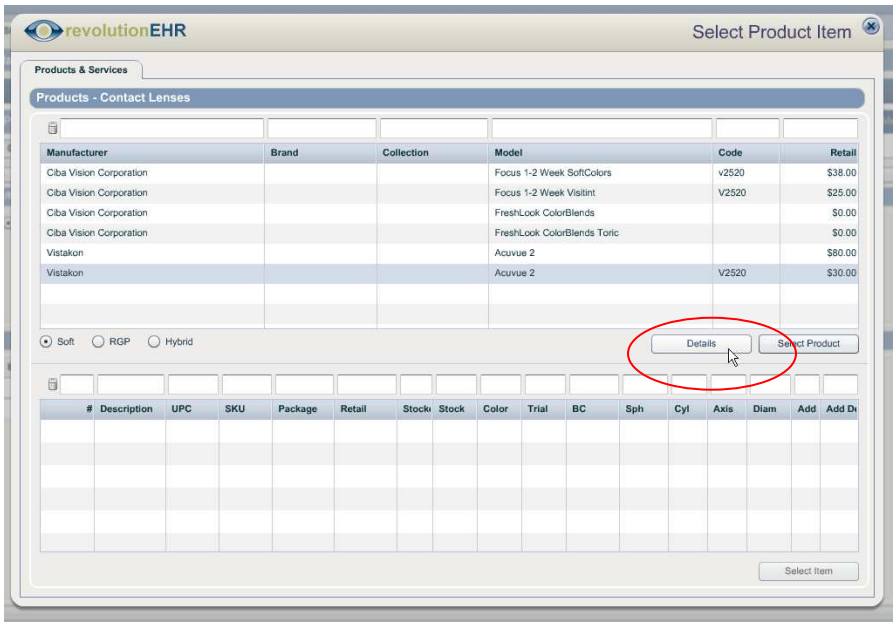
In Administration/General/Practice Preferences users may configure a "From" email address that is associated to any emails sent out of RevolutionEHR. This field has been updated to allow for more characters

1.6 General UI

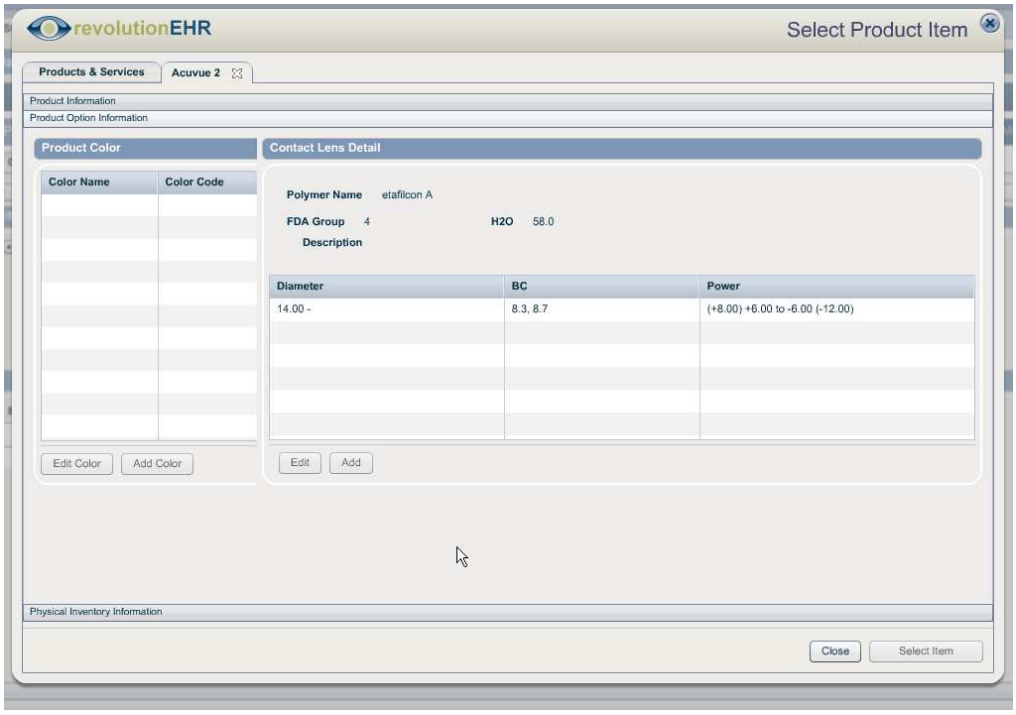
1.6.1 Display product options when using a product look up button

When using a product look up button in a contact lens Rx or within an order you may now view the "Product Option Information" for the products available.

The "Open" button has been changed to "Details"



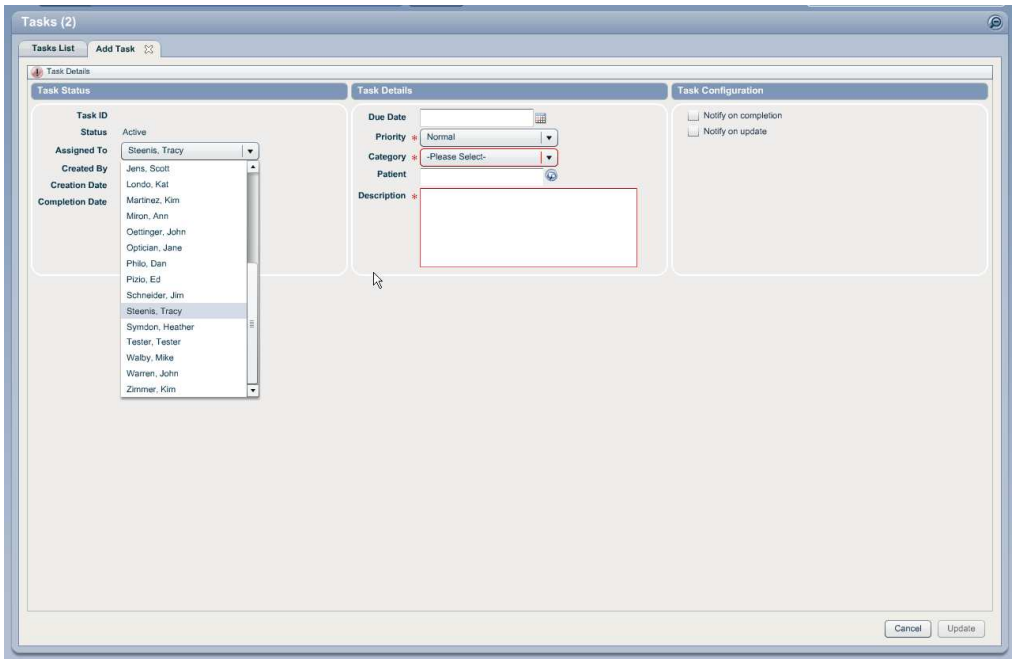
When you select a product and then click "Details" it will display the same file that can be seen if viewing the product in Inventory. This also allows the user to click on the "Product Option Information" slider to view information about that product (colors, sizes, parameters, etc):



1.7 Tasks

1.7.1 Drop downs

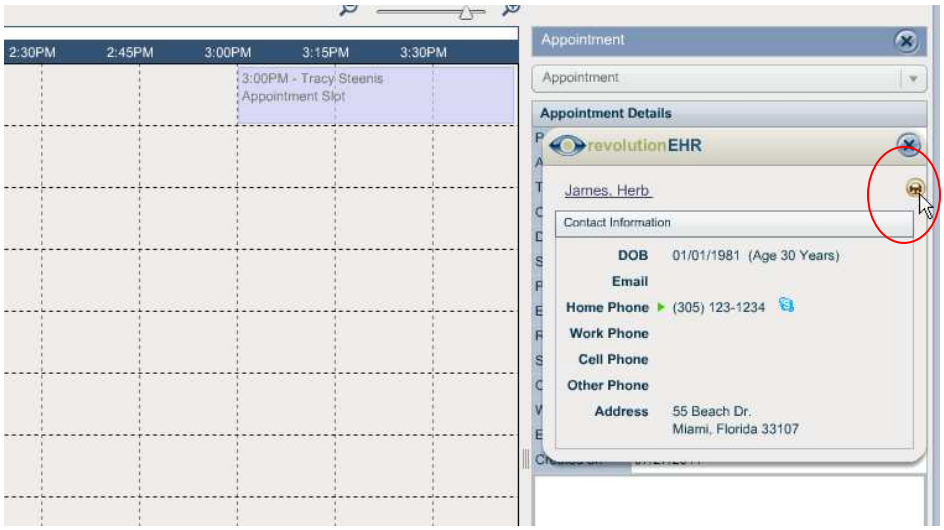
The "Employee" and "Category" drop downs in tasks have been expanded to show more options at one time



1.8 Scheduling

1.8.1 Batch printing patient summaries

Many offices like to print out the patient summary that is available from the patient contact quick view in appointment details for the patient to review at check in.



For this reason we have added the ability to print these in batches for all appointments on a given day.

Select the appropriate day in the schedule. Click "Print" in the upper left, and select "Patient Summaries"

A pdf document will open that contains a patient summary for every patient that has an appointment scheduled that day regardless of filter settings on employees or roles.

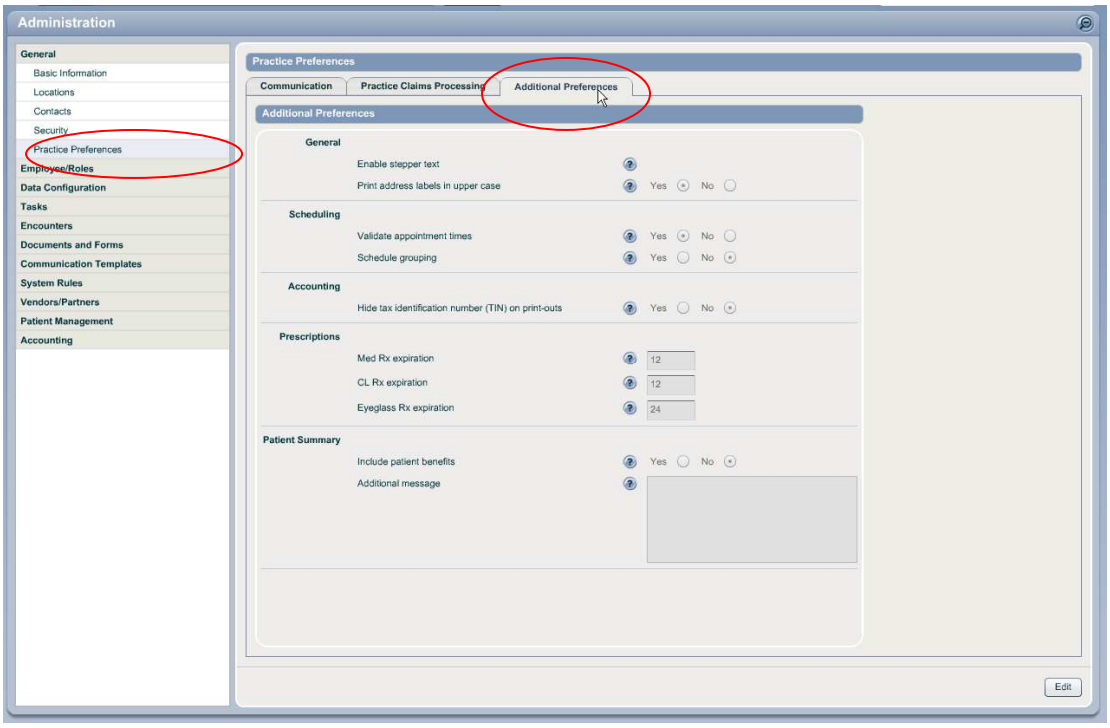
1.8.2 Printing the Schedule

The button for printing the schedule has been moved and changed to an option called "Schedule" under the new "Print" option in the upper left of the Schedule

1.9 Practice Preferences

A new feature has been added that will allow users to select their own practice preference settings for features that previously had to be "turned on" by RevolutionEHR.

To access the new Practice Preference options go to Administration/General/Practice Preferences and click on the "Additional Preferences" file tab at the top:



Please note that any preference options you currently have "turned on" for your practice will automatically be set to display that option appropriately. There is no need to go in to reset any existing preferences you may have requested

The follow is a list of those preference options and their definitions:

1.9.1 General

This category currently has two options:

- **Enable stepper text**: Because this particular setting has the potential to change historical data when turned on and off we are leaving this as a setting that must be requested through RevolutionEHR. We have included it in the screen so that users understand that this is an available option. The Help icon will indicate to the user that they should request this change via customersupport@revolutionehr.com

  As a reminder, this option affects all fields where there are numerical "steppers"; meaning that the field accepts a number value and the user can click up and down through those available numbers based on the setting for the "stepper". For example in the power fields within an rx, the default stepper is in quarter diopters, therefore the user can click up and down in quarter diopter steps. If the user tries to manually type in a number that does not match one of the steppers, the application will round that entry to closest available stepper.

After this preference setting is enabled by RevolutionEHR, the user will then be allowed to manually type in any numeric value and the stepper will no longer automatically round the entry. This eliminates the ability for the application to auto-correct typos, but does allow the user the flexibility to enter any numeric value. Clicking the arrow buttons will still take the entries up and down using the preset stepper value.

- **Print Address labels in upper case**: This affects any document that contains a mailing address. Clicking "Yes" for this preference setting automatically displays that address in all caps.

1.9.2 Scheduling

This category currently has two options:

- **Validate Appointment Times**: Clicking "Yes" for this option will add an alert to the Scheduling Module that will inform the user when an appointment is being booked outside of normal offices hours, or during times that are not configured as "Employee Hours" for the provider associated to the appointment.

  It is important to note that the alert is for both of these conditions and cannot be turned on for just one of them. If you request this alert to be turned on for your practice you must set up "Employee Hours" in Scheduling for all providers or you will be alerted every time you book an appointment. You do not have to display the employee hours in your schedule but they must be configured.

  This alert will not prevent you from booking the appointment, but is simply a notice that you are trying to schedule outside of the "normal" hours.

  The following are the conditions that will trigger the alert:

  - The start or end time of the appointment falls during "closed" time for the office hours

  - The start or end time of the appointment does not fall in the configured range for employee hours for the provider associated to the appointment

  - The start or end time of the appointment falls during a "Busy Time" that has been configured for the provider associated to the appointment

- The start or end time of the appointment fall during a time that has been set up in the schedule using the "Office Closed" calendar item

If any of these conditions are met, the following message will pop up

Clicking "Yes" will allow you to continue booking the appointment.

- **Schedule Grouping**: Clicking "Yes" for this option will automatically set the "Grouping" option in Scheduling to "Enabled" for all employees. Without this preference, the user can select "Enabled" from the "Grouping" drop down in Scheduling, but after log out/in the setting would default back to not being selected. Once this preference is enabled for the practice all users would have grouping enabled as a default.

1.9.3 Accounting

This category currently has one option:

- **Hide tax identification number on print outs**: On patient receipts and patient statements, the practice's tax identification number is defaulted to be included on those documents. We have received requests from offices that prefer that those numbers not be displayed within those documents. For that reason, the office may now choose to hide the tax id on printed documents.

Clicking "Yes" for this preference will prevent your tax id from being included in those printed documents.

1.9.4 Prescriptions

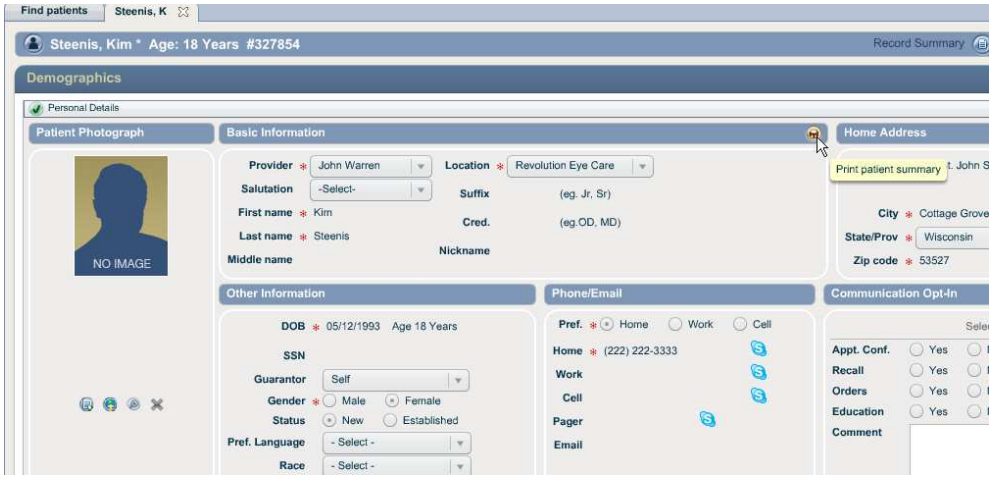
This category currently has three options, but all options apply to setting the default range on expiration dates. Please note that these are set by "months", so a default expiration of one year would be entered as "12".

Simply enter in the appropriate total number of months for each prescription type to control your default expiration.

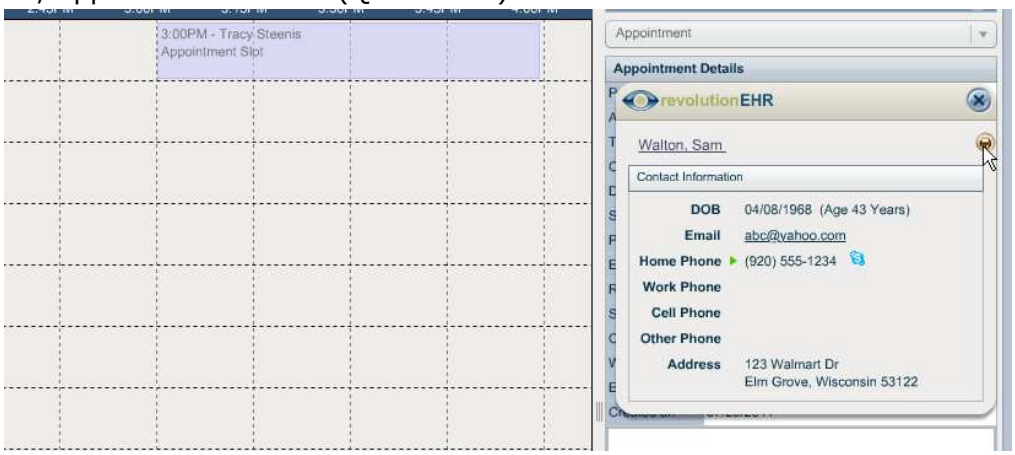
1.9.5 Patient Summary

This category currently has two options, and both options affect the information displayed in the "Patient Summary" document. This is the document that is accessed when clicking the printer icon from the patient's demographics information in the Patient Dashboard (Demographics Pod):

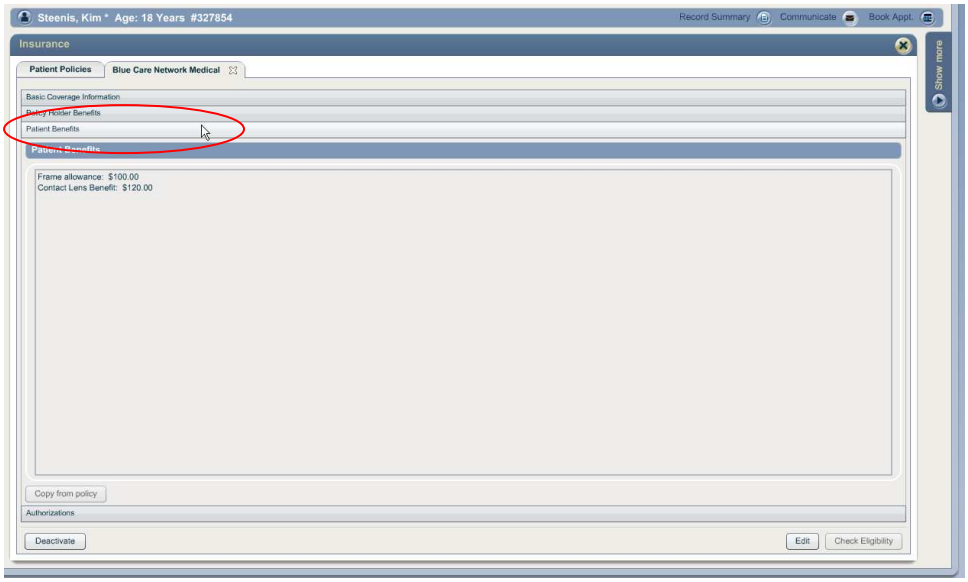
Patient Demographic Component (Basic Information header)



Or, Appointment Details (Quick View)



- **Include Patient Benefits**: Clicking "Yes" to this option will now include in the Patient Summary document any information that was entered in the "Patient Benefits" slider within the patient's insurance coverage file:



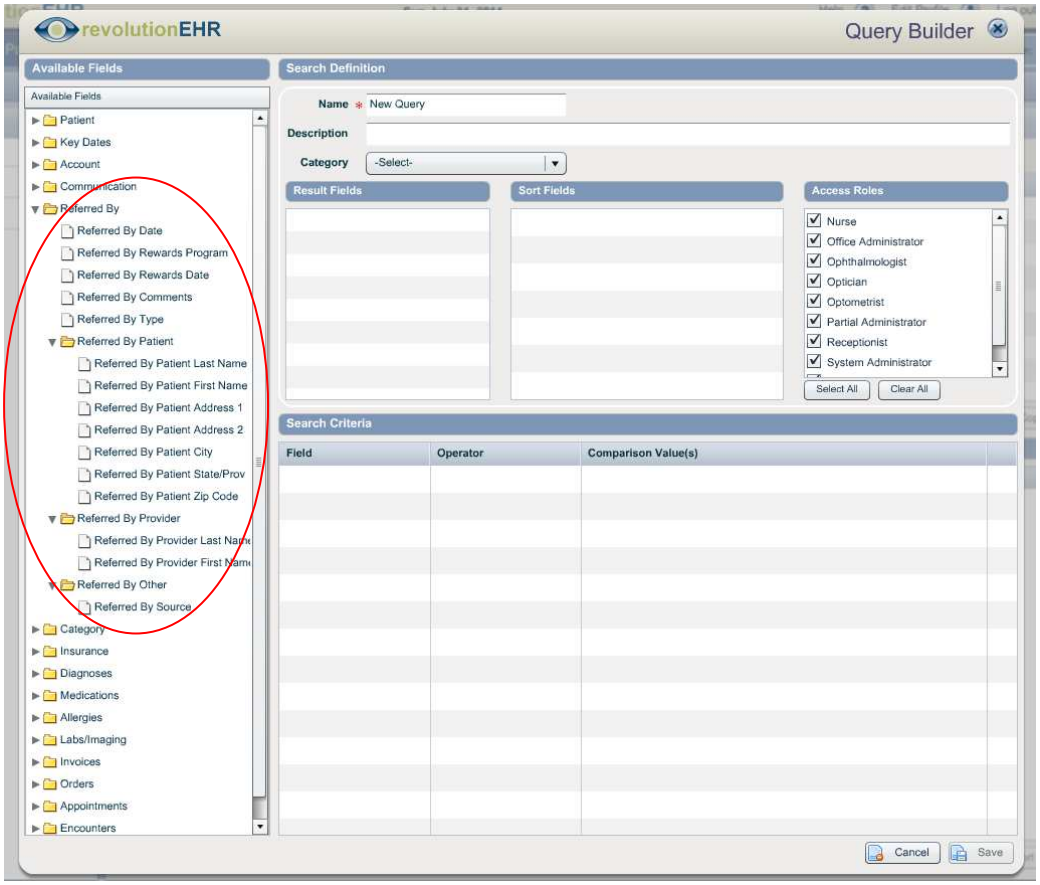
- **Additional Message**: This option allows the user to create a custom message that will be included at the bottom of the Patient Summary. Entering text into this field will automatically trigger that text to be displayed in the Patient Summary

1.10 Marketing

1.10.1 Patient Referral Fields

New data fields have been added to the "Patient Search" feature within the Marketing Module that will now allow users to included patient referral information in their search and results criteria.

These fields pull information entered in the "Referral Information" slider within the patient demographics component:



2. Fixes

2.1 EHR

2.1.1 CL Trials

The OD = OS button has been fixed for all tests found in the "Trial Performance" slider when adding or editing a CL trial.

2.1.2 Phorias and Vergences

A problem existed in the grid displayed for "View Test History" for the Vergences and Phorias tests where there were column headers that contained the same label (Blur, Break and Recovery for Vergences and Prism for Phorias).
The identical header names caused problems when pulling and displaying data in the "View Test History" grid for these tests.

This was also causing problems in the encounter print out when trying to appropriately display the data entered for those tests using the "View" button.

This has been resolved with an adjustment to the labels for the column headers and has fixed the problem in both "View Test History" as well as the encounter print out.

2.2 Accounting

2.2.1 Sorting in the Receive Payment screen

The "Receive Payment" screen allows users to sort the list by any column header. Most commonly users will sort by Patient Name to match the list on the EOB. If a patient was listed more than once in the Receive Payment screen, and the list was sorted by patient name, the list would resort as soon as a payment was entered for that patient and move the invoice being paid up the list causing user to click on the wrong "transfer" link.

This issue has been resolved and sorting the list will retain the order when payments are applied.

2.2.2 Sorting in the Search Claims screen in Administration

Similar to the sorting issue in the Receive Payment screen, problems were encounter when sorting a list created in the "Search Claims" screen in Administration.

After sorting by a specific column, the list would "re-sort" as soon as a box to the far left was checked for any claim in the list. This has been resolved and sorting the list will retain the order when boxes are checked.

2.3 Prescriptions

2.3.1 General Meds

The patient's medication history grid was using the "Description" for General Meds in the grid when displaying any General Meds that had been added for that patient. If the General Med did not have a description, then nothing would be displayed for that patient.

This has been changed to display the General Med "Name"

2.3.2 Prescription Notes

There was a refresh issue in the notes slider for eyeglass and contact lens prescriptions where the system notes and newly added manual notes would not show up when working on a new Rx. Closing and reopening the Rx would then display the notes.

This has been fixed.

2.4 Administration

2.4.1 Pharmacies

There was a problem with the city auto-fill on Pharmacies where the user would type in a zip code and the city would auto fill, but the update button would not activate. The user would then need to manually type in the city name.

This issue has been resolved.

3. Meaningful Use

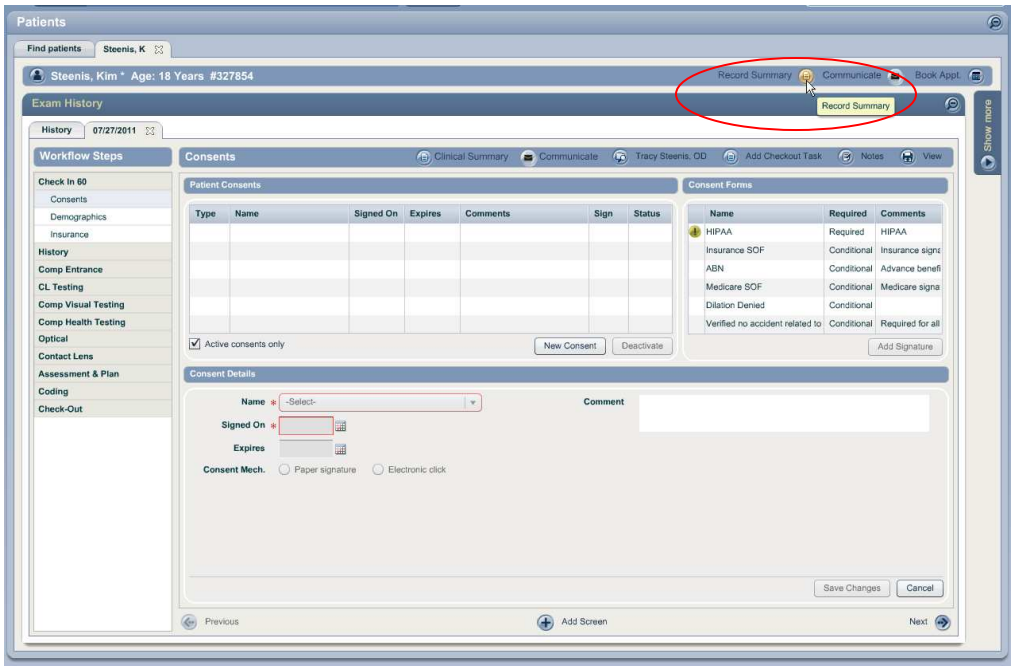
Most changes in this release related to Meaningful Use were changes not completely visible to the user, but were to adjustments and fixes related to Meaningful Use calculations to ensure the most accurate count possible

3.1 General UI

3.1.1 Clinical Summary Button

Currently there are two buttons labeled "Clinical Summary", one is at the encounter level and the other is at the patient level. This was causing some confusion as only the Clinical Summary at the encounter level is being counted for *Meaningful Use Core 13 – Clinical Summaries of an Office Visit.* While the Clinical Summary at the patient level is used only for *Meaningful Use Core 12 – E-Copy of Health Information*

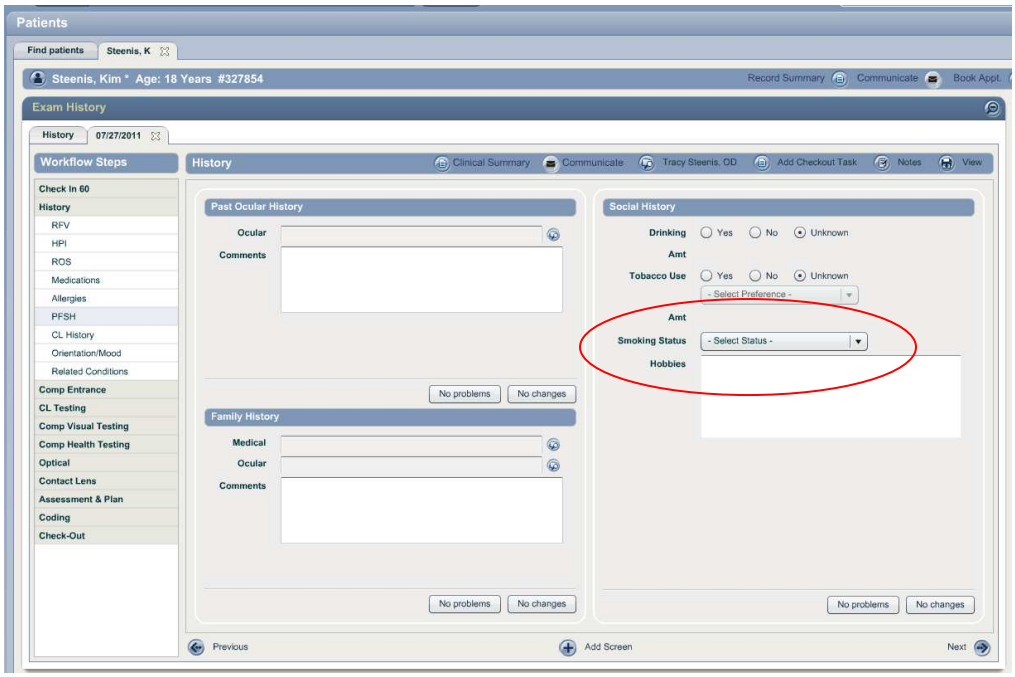
For that reason, the button at the patient level has been change to "Record Summary":



3.1.2 Smoking Status Drop Down

Currently the smoking status drop down defaults to Unknown if ever smoked. Because this drop down defaults, it is not counted for *Core 9 – Record Smoking Status* unless changed by the user.

For that reason we are now changing that drop down to have no default which requires the user to select a status, and will then be counted



3.2 Encounter Type

Currently, the Meaningful Use report will count all encounter types. However, there are certain encounters that you may not wish to have counted against the Meaningful Use calculations (Phone encounter is a good example of this). For that reason we have added the ability for users to select which encounter types should be counted for Meaningful Use.

- To select or unselect an encounter type:
- Go to Administration/Encounters/Encounter Templates
- Open the appropriate Encounter Template
- Edit in the bottom right
- Check or uncheck as needed the new "Include in MU calculations" check box
- Update in the bottom right