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RevolutionEHR Release 5.3.2a

Release Notes

September 13, 2011

Overview

This is a mini release containing three items that have been in beta testing or currently under construction. The purpose of this release is to make these items available prior to our normally larger monthly release. Included are Sales by Employee tracking/reporting, Patient Statement integration with Gateway, and several new tests in the Exam Test Library.

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1. Enhancements

1.1 Sales by Employee

1.1.1 Overview

The ability to track sales by employee has been in beta testing for several months. This feature associates each line item on an invoice to a specific employee and a report is available to view "Sales by Employee"

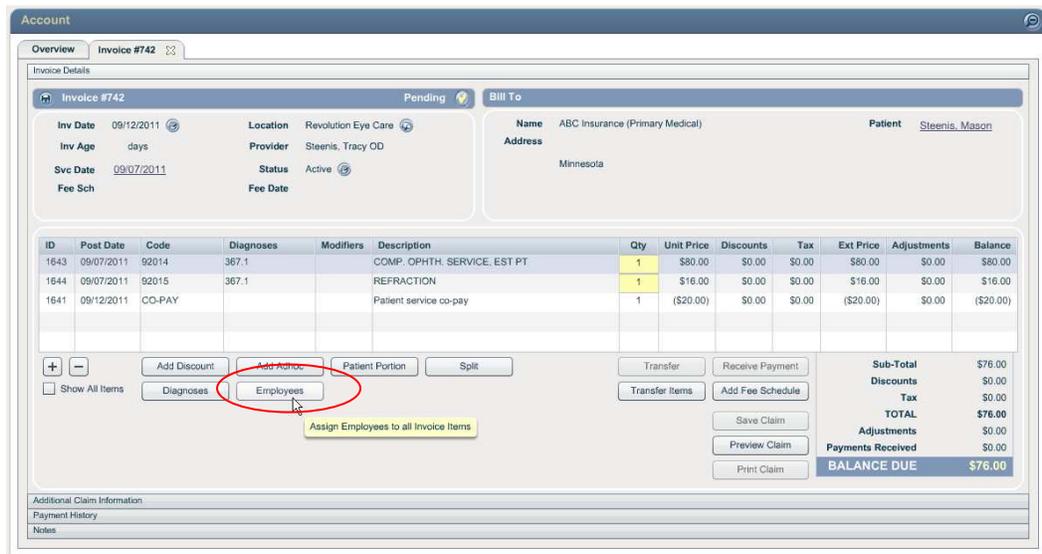
By default, when a line item is added to an invoice the employee logged in while adding that item is the employee that is associated to the item.

Because this feature has been in beta testing for some time, the app has been associating sales to employees in the database since March. Therefore historical reporting from that date will be available for all offices. With the release of this feature, users may now change the associated employee as well as run the reports

1.1.2 Viewing and editing the employee associated to an invoice line item

The association of an employee to a line item is automatically done when the item is added to the invoice. The employee associated will be the employee that is logged in when the action occurs.

You may view and edit the employee(s) associated to each item on the invoice by clicking the new "Employees" button:



The screenshot shows the 'Account' interface for 'Invoice #742'. The invoice is in 'Pending' status and is billed to 'ABC Insurance (Primary Medical)'. The patient is 'Steenis, Mason'. The invoice details include:

- Inv Date: 09/12/2011
- Inv Age: days
- Svc Date: 09/07/2011
- Fee Sch: [unspecified]
- Location: Revolution Eye Care
- Provider: Steenis, Tracy OD
- Status: Active
- Fee Date: [unspecified]
- Name: ABC Insurance (Primary Medical)
- Address: Minnesota
- Patient: Steenis, Mason

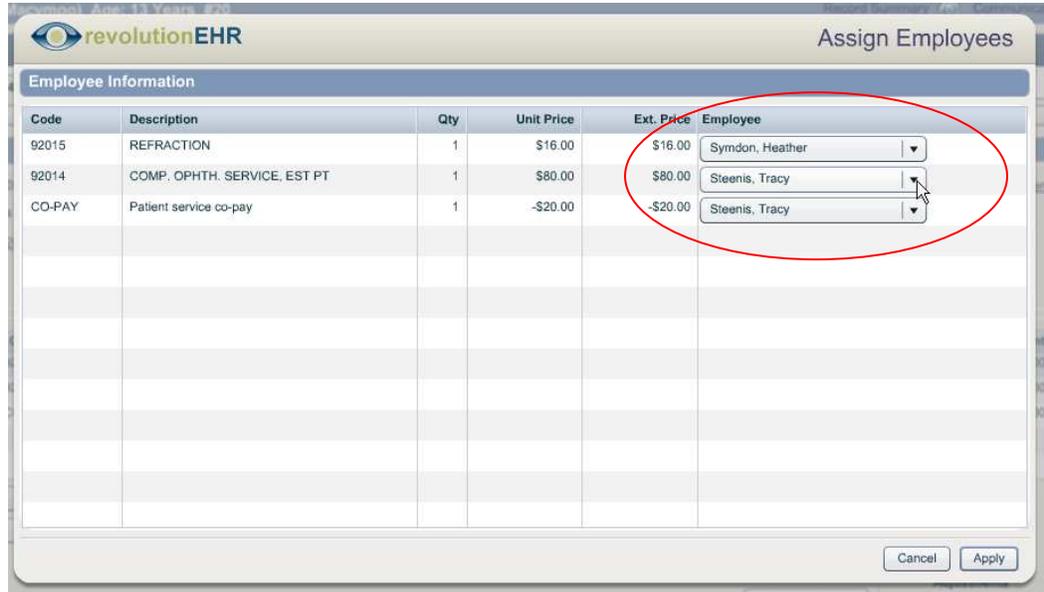
The invoice items table is as follows:

ID	Post Date	Code	Diagnoses	Modifiers	Description	Qty	Unit Price	Discounts	Tax	Ext Price	Adjustments	Balance
1643	09/07/2011	92014	367.1		COMP. OPTH. SERVICE, EST PT	1	\$80.00	\$0.00	\$0.00	\$80.00	\$0.00	\$80.00
1644	09/07/2011	92015	367.1		REFRACTION	1	\$16.00	\$0.00	\$0.00	\$16.00	\$0.00	\$16.00
1641	09/12/2011	CO-PAY			Patient service co-pay	1	(\$20.00)	\$0.00	\$0.00	(\$20.00)	\$0.00	(\$20.00)

Below the table, there are several buttons: '+', '-', 'Add Discount', 'Add Action', 'Patient Portion', 'Split', 'Diagnoses', and 'Employees'. The 'Employees' button is circled in red. A tooltip 'Assign Employees to all Invoice Items' is visible below the 'Employees' button. On the right side, there are buttons for 'Transfer', 'Receive Payment', 'Add Fee Schedule', 'Save Claim', 'Preview Claim', and 'Print Claim'. A summary table on the right shows:

Sub-Total	\$76.00
Discounts	\$0.00
Tax	\$0.00
TOTAL	\$76.00
Adjustments	\$0.00
Payments Received	\$0.00
BALANCE DUE	\$76.00

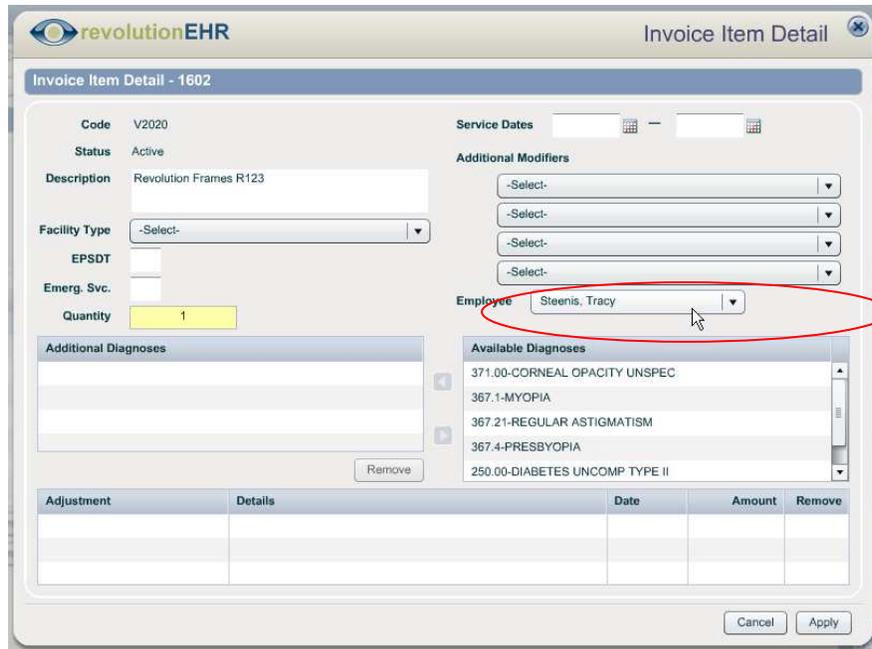
This will open an "Assign Employees" pop up window which will display each line item from the invoice along with the employee that is associated to the sale of that line item. The associated employee can be changed by selecting a different employee from the "Employee" drop downs



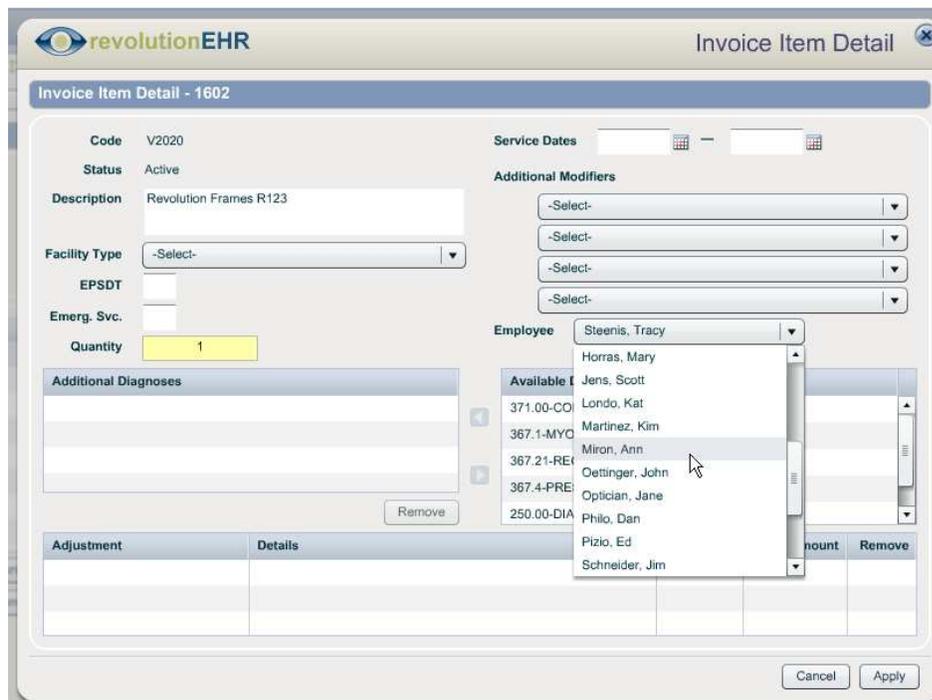
Code	Description	Qty	Unit Price	Ext. Price	Employee
92015	REFRACTION	1	\$16.00	\$16.00	Syndon, Heather
92014	COMP. OPHTH. SERVICE, EST PT	1	\$80.00	\$80.00	Steenis, Tracy
CO-PAY	Patient service co-pay	1	-\$20.00	-\$20.00	Steenis, Tracy

Another option for viewing and editing the employee associated to any item is double clicking on that item to view the Invoice Item Details pop up window.

A new drop down labeled "Employee" is found under the modifier drop downs:



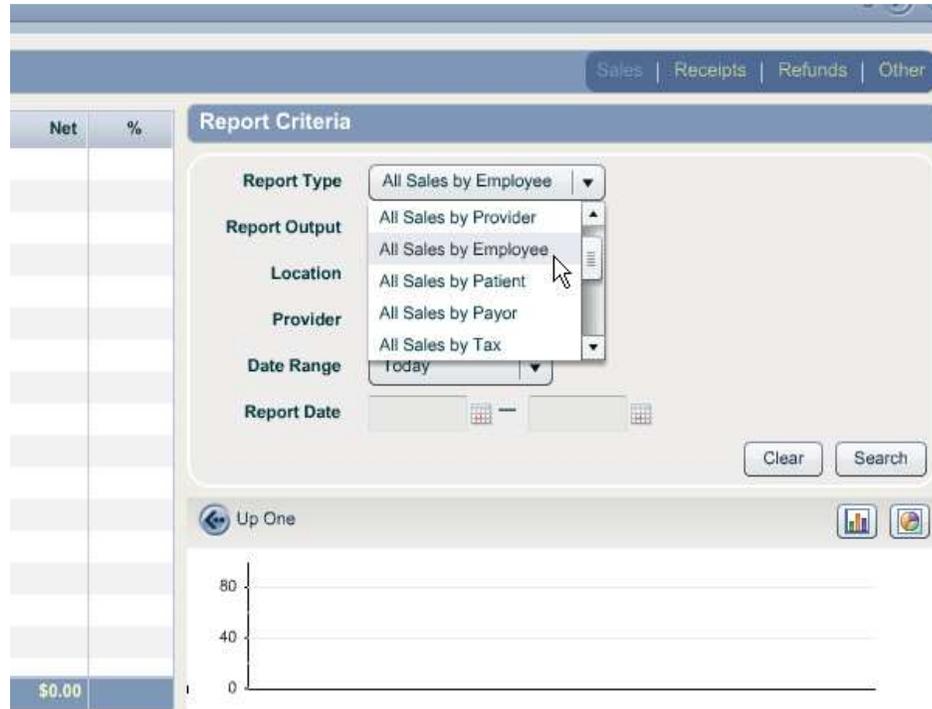
If it is necessary to change the employee associated to an item, simply select a different employee from that drop down and click "Apply"



1.1.3 Sales by Employee Report

A Sales by Employee Report can be run in the Accounting Module in the Accounting Reports screen.

The Sales by Employee report is run like all other sales reports. From the Sales report screen a new option has been added in the "Type" drop down for "All Sales by Employee"



The first level of the Sales by Employee report will be breakdown of all employees that have an associated sale. Drilling down the report on a specific employee will show a breakdown of sales that is identical to the "All Sales by Type" report, but only shows that breakdown specific to the employee selected. From that level the drill down levels are the same as the All Sales by Type report.

An employee named "null, null" will show up in the Sales by Employee report if the date range includes dates prior to the addition of sales by employee tracking in March, 2011.

1.2 Electronic Patient Statements

1.2.1 Overview

The ability to send patient statement information electronically to Gateway is now available. Gateway offers a patient statement mailing option, and this new integration allows RevolutionEHR users the ability to take advantage of

this Gateway optional service by allowing the user to electronically forward statement information to Gateway. This option will include an additional per statement fee that will be quoted by Gateway.

The majority of the preparation for Gateway patient statements is done directly with Gateway. Step one for using this new integration feature will be to contact Gateway to initiate the set up process.

We will be offering a joint RevolutionEHR/Gateway webinar on the RevolutionEHR functionality and the options available from Gateway for patient statements. This webinar will be hosted by RevolutionEHR but will feature a GatewayEDI presenter. The webinar is scheduled for for September 22nd at 12:00 pm Central. An email invitation with a registration button will be sent to RevolutionEHR users in the next week.

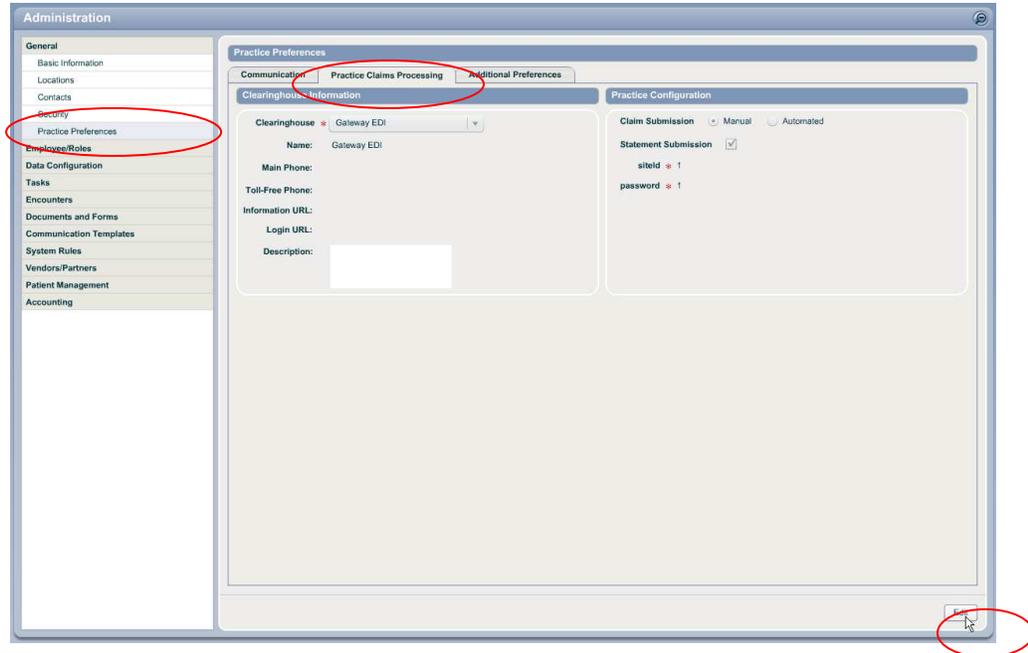
1.2.2 How to get started

The first step in using this integration to send statement information to Gateway will be to contact GatewayEDI Customer Support at 1-800-969-3666. Let Gateway support know that you are a current Gateway customer and would like to add Patient Statements. Once your Gateway plan has been updated, a Gateway Patient Statements specialist will work with you through the statement configuration process.

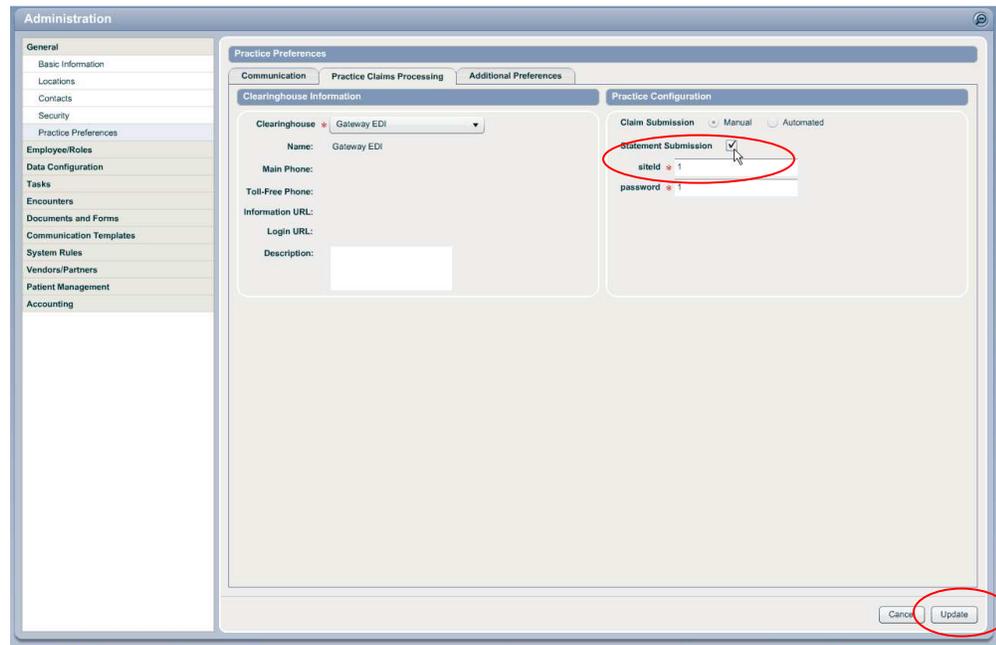
During the statement configuration process, you will be asked to send a Patient Statements Test File. When Gateway is ready for your test file you may turn on the integration.

1.2.3 Turning on the Patient Statement Integration for your practice

- Go to Administration/General/Practice Preferences
- Click on the "Practice Claims Processing" tab
- Click "Edit"

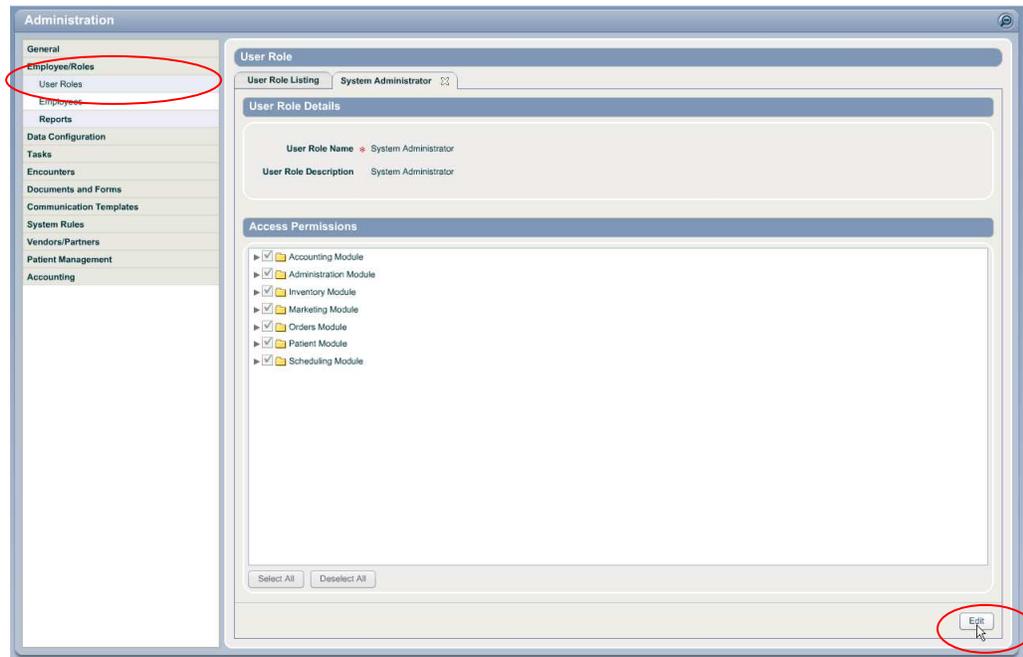


- Check the box for "Patient Statements"
- Click "Update"

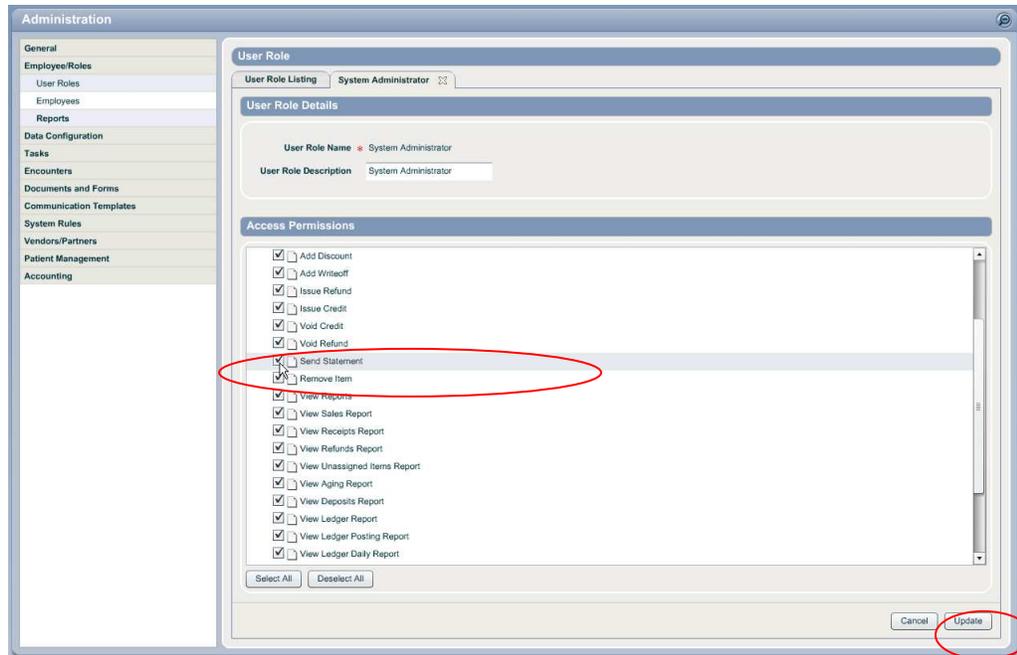


This will enable the Patient Statement integration for your practice. However, you must give permission to send statement to specific user roles to allow users the ability to use this integration.

- Determine which user role should have access to sending Patient Statements.
- Go to Administration/Employee, Roles/User Roles
- Open the appropriate User Role file
- Click "Edit"



- Click the grey triangle to the left of the "Accounting" folder
- Check the box for "Send Statements"
- Click "Update"



IMPORTANT NOTE: Do not turn on your Patient Statement integration until Gateway is ready for a test file

1.2.4 Sending Patient Statement Information to Gateway

Once the Patient Statement integration has been enabled, sending patient statement information to Gateway uses the exact same process used for printing statements. You will send your Patient Statement test file using the same method that you will use to send Patient Statements when the Gateway configuration is complete:

From the Accounting Module configure a list of patient invoices using the Accounting search options. Remember that only "Authorized" patient invoices can be included in a patient statement. Once that list has been generated, check the boxes to the left of the invoices you wish to have included in the patient statement information being sent to Gateway. "Select All" in the bottom left will check the box for each invoice, and specific invoices can be unselected if needed.

Once the appropriate invoices have been checked, a new button for "Send Statements" will be available (users will still have the option to "Print Statements if needed):

Accounting Accounting Reports

Accounting Home

Location: Revolution Eye Care Payor Type: Patient Payors Invoice #: Invoice Date: Service Date: Stmt. Print Date: Invoice Age: Any

Status: Active Patient Name: Patient #: Provider: All

Approval: Authorized Payor Name: Patient #: Invoice Age: Any

Origin: Any Provider: All

Clear Search

	#	Payer	Patient	Age	Inv. Date	Svc. Date	Stnt. Date	Amount	Balance
<input checked="" type="checkbox"/>	59	Leah Steenis	Steenis, Leah	591	01/23/2010	01/21/2010	06/30/2011	\$15.00	\$15.00
<input checked="" type="checkbox"/>	68	Michelle Klute	Klute, Michelle	590	01/23/2010	01/23/2010	06/30/2011	\$260.00	\$160.00
<input checked="" type="checkbox"/>	70	Kim Martinez	Martinez, Kim	590	01/23/2010	01/23/2010	06/30/2011	\$185.19	\$185.19
<input checked="" type="checkbox"/>	73	Molly Guyer1	Guyer1, Molly	589	01/24/2010	01/22/2010	06/30/2011	\$20.00	\$20.00
<input checked="" type="checkbox"/>	74	Kim Martinez	Martinez, Kim	589	01/24/2010	01/23/2010	06/30/2011	\$10.00	\$10.00
<input checked="" type="checkbox"/>	80	Mason Steenis	Steenis, Mason	586	01/28/2010	01/28/2010	06/30/2011	\$62.00	\$0.00
<input checked="" type="checkbox"/>	84	Leah Steenis	Steenis, Leah	582	02/01/2010	02/01/2010	08/02/2011	\$36.00	\$36.00
<input checked="" type="checkbox"/>	92	Leah Steenis	Steenis, Leah	581	02/02/2010	02/02/2010	08/02/2011	\$135.89	\$58.89
<input checked="" type="checkbox"/>	93	Leah Steenis	Steenis, Leah	581	02/02/2010	02/02/2010	06/30/2011	\$126.00	\$126.00
<input checked="" type="checkbox"/>	121	Leah Steenis	Steenis, Leah	559	02/23/2010	01/18/2010	06/30/2011	\$155.00	\$155.00
<input checked="" type="checkbox"/>	126	Leah Steenis	Steenis, Leah	559	02/24/2010	02/24/2010	06/30/2011	\$0.00	\$0.00
<input checked="" type="checkbox"/>	132	Leah Steenis	Steenis, Leah	558	02/25/2010	02/25/2010	06/30/2011	\$78.00	\$28.00
<input checked="" type="checkbox"/>	139	Mary Horras	Horras, Mary	552	03/03/2010	02/22/2010	06/30/2011	\$177.00	\$10.00
								TOTAL	\$11,472.38

Select All Clear All 113 Invoice(s) selected

Receive Payment Print Invoice Print Statements (113) **Send Statements (113)** Print Summaries (113) Open New Invoice

Please note that the number displayed in the print and send statements buttons is currently displaying the number of selected invoices and may not be the same as that number of statements being sent as several invoices may be part of a single statement for families or patients with multiple invoices.

When "Send Statements" is selected, the user still has the option to set a due date and include a custom message:

revolutionEHR Send Statments

Mark Statements Printed? 09/06/2011

Statements Due Date Custom... 09/22/2011

Statements Message Visit our website at www.revolutionehr.com

Visit our website at www.revolutionehr.com

Cancel Send Statements

Clicking "Send Statements" will send the statement information to Gateway electronically and automatically update the "statements printed" date for each invoice selected.

1.3 New Tests

1.3.1 Overview

Several new tests have been added to the Exam Test Library and are available to be added to your encounters as needed.

Please see Appendix A of this document for a complete list of the new tests being added.

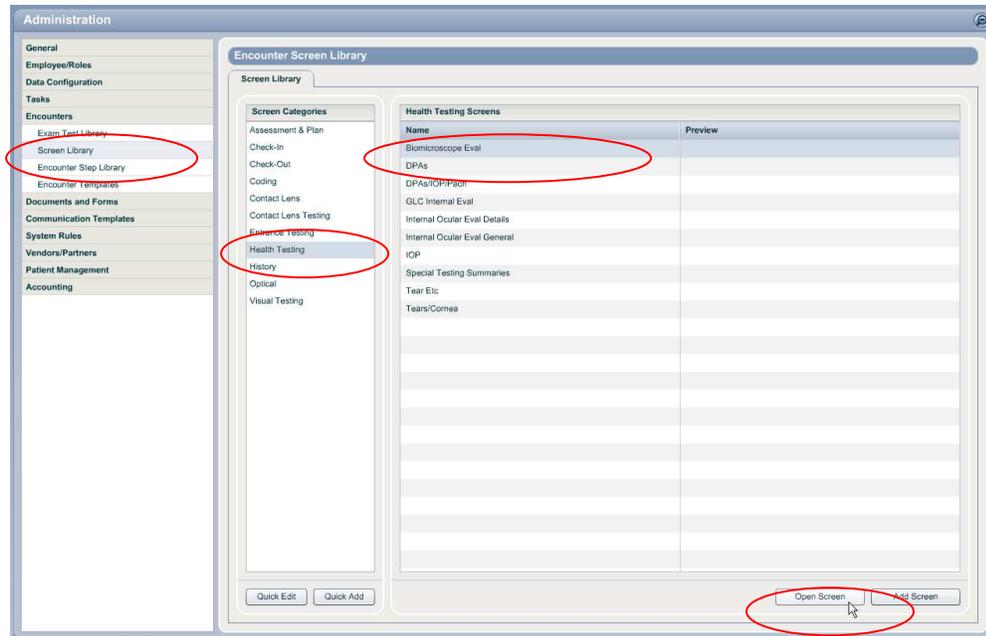
1.3.2 Adding a test to an encounter

New tests can be added to your encounters by adding the test(s) to a specific screen or screens.

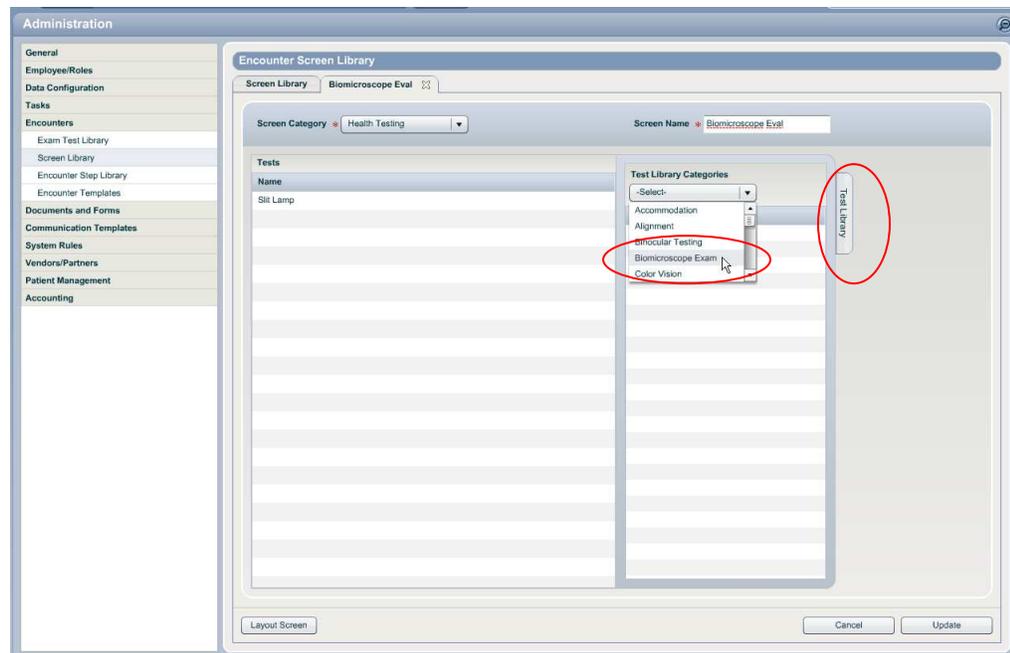
An encounter is comprised of a series of workflow steps, and each workflow step is made up of one or more screens. The important thing to first determine to which "screen" you would like to add the new test(s).

Once you have the appropriate screen name go to Administration/Encounters/Screen Library. In the following example, we will add the new "Tear Film Test" to the "Biomicroscope Eval" Screen.

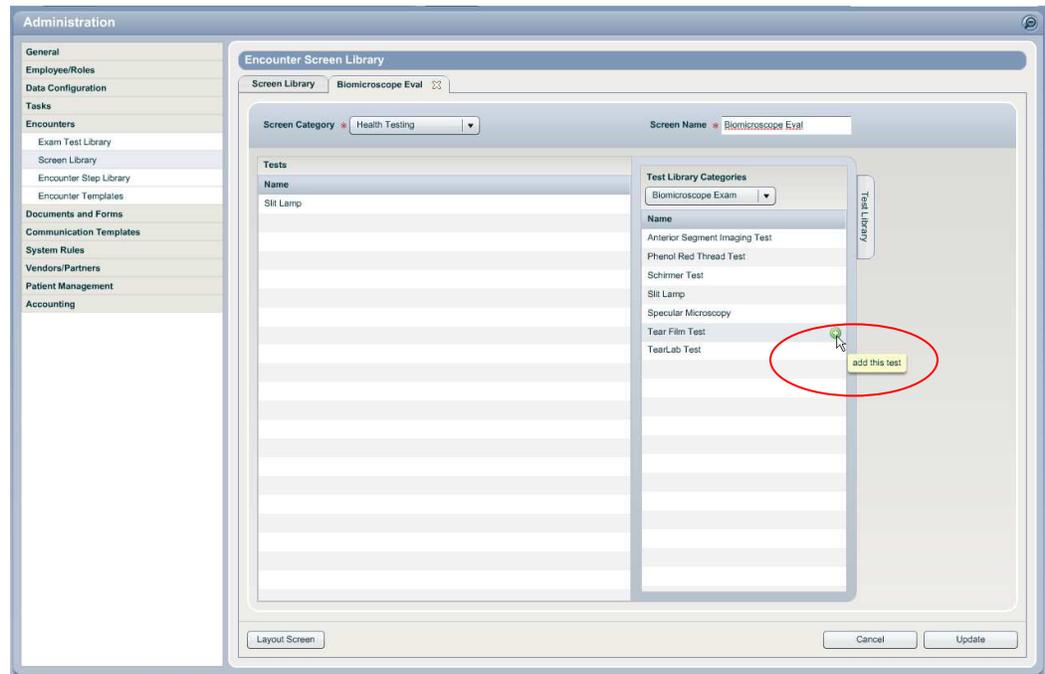
- Once in the Screen Library select the appropriate category from the list on the left, and open the appropriate test.



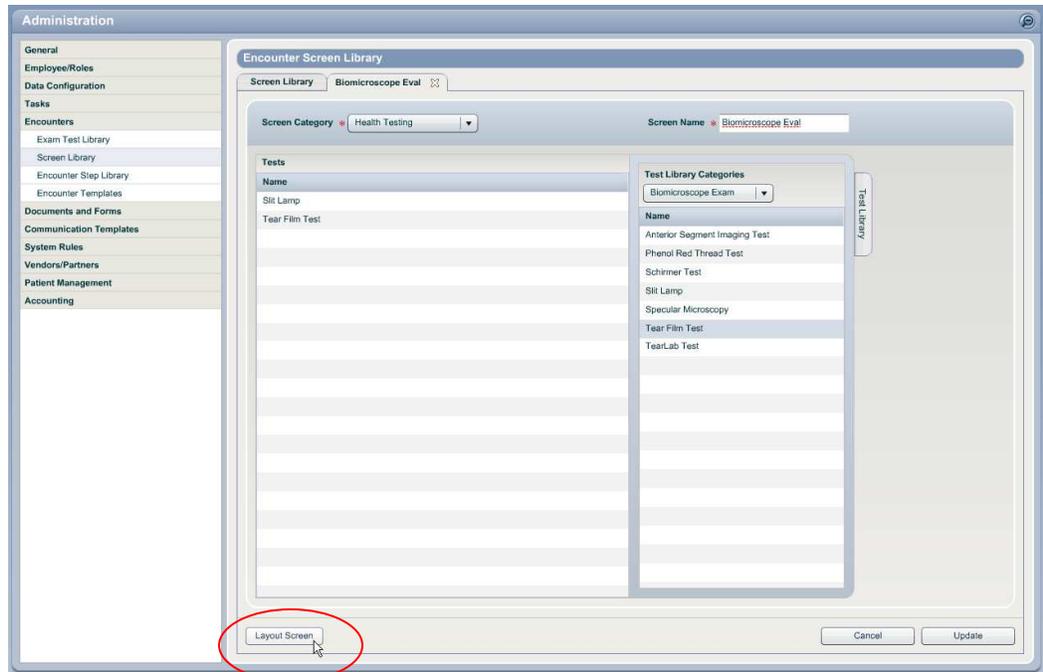
- Click "Edit" in the bottom right
- Click on the sideways "Test Library" tab
- Select the appropriate test category from the "Test Library Category" drop down



- Float your cursor over the test you wish to add and click the green plus button to the right



- Click "Layout Screen" in the bottom left. This step is necessary anytime you add or remove a test from a screen. Adding a new test will simply add that test to the upper left corner of the screen and will cover existing tests. Removing a test will leave a gap in that screen where the test had been. Using the "Layout Screen" button will allow you to drag the tests around in the screen and place those tests where the user would like them to appear.



- Drag the test by clicking on the blue header bar with your mouse and dragging the test to a new location
- Click "OK"



Appendix A

New Tests

Specular Microscopy

Exam Test Library Category: Biomicroscope Exam

OD		OS
<input type="text"/>	Cell Density	<input type="text"/>
<input type="text"/>	Cell Variance	<input type="text"/>
<input type="text"/>	Hexagonal Cells	<input type="text"/>
<input type="text"/>	Number of Cells	<input type="text"/>
<input type="text"/>	Pach	<input type="text"/>
<input type="text"/>	Avg Cell Size	<input type="text"/>
<input type="text"/>	Max Cell Size	<input type="text"/>
<input type="text"/>	Min Cell Size	<input type="text"/>
<input type="text"/>	Std Dev	<input type="text"/>
<input type="text"/>	Guttata	<input type="text"/>

Additional Comments

TearLab

Exam Test Library Category: Biomicroscope Exam

OD		OS
<input type="text"/>	Osmolarity (mOsms/L.)	<input type="text"/>

Additional Comments

Anterior Segment Imaging Test

Exam Test Library Category: Biomicroscope Exam

	OD	OS
Lighting Technique	<input type="text"/>	<input type="text"/>
Order	<input type="text"/>	<input type="text"/>
Interpretation	<input type="text"/>	<input type="text"/>

Tear Film

Exam Test Library Category: Biomicroscope Exam

OD		OS
<input type="text"/>	Volume	<input type="text"/>
<input type="text"/>	Quality	<input type="text"/>
<input type="text"/> sec.	Tear Break Up	<input type="text"/> sec.
<input type="text"/>	Fluorescein Stain	<input type="text"/>
<input type="text"/>	Lissamine Green St..	<input type="text"/>
<input type="text"/>	Rose Bengal Stain	<input type="text"/>
Additional Comments		
<input type="text"/>		

Schirmer Test

Exam Test Library Category: Biomicroscope Exam

OD		OS
<input type="text"/>	Time (min)	<input type="text"/>
<input type="text"/>	Length (mm)	<input type="text"/>
Additional Comments		
<input type="text"/>		

Phenol Red Thread Test

Exam Test Library Category: Biomicroscope Exam

OD		OS
<input type="text"/> : <input type="text"/>	Time (min:sec)	<input type="text"/> : <input type="text"/>
<input type="text"/>	Length (mm)	<input type="text"/>
Additional Comments		
<input type="text"/>		

Humphrey Threshold Visual Field Testing

Exam Test Library Category: Visual Fields

OD			OS		
Program	Strategy	Color	Program	Strategy	Color
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Order			Order		
<input type="text"/>			<input type="text"/>		
MD	<input type="text"/> dB	P Value <input type="text"/> %	MD	<input type="text"/> dB	P Value <input type="text"/> %
PSD	<input type="text"/> dB	P Value <input type="text"/> %	PSD	<input type="text"/> dB	P Value <input type="text"/> %
VFI	<input type="text"/> %		VFI	<input type="text"/> %	
GHT	<input type="text"/>		GHT	<input type="text"/>	
Fixation Losses	<input type="text"/>		Fixation Losses	<input type="text"/>	
False Negatives	<input type="text"/> %		False Negatives	<input type="text"/>	
False Positives	<input type="text"/>		False Positives	<input type="text"/>	
Duration (min:sec)	<input type="text"/>	<input type="text"/>	Duration (min:sec)	<input type="text"/>	<input type="text"/>
Report	<input type="text"/>		Report	<input type="text"/>	

Octopus

Exam Test Library Category: Visual Fields

OD			OS		
Program	Strategy	Color	Program	Strategy	Color
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Order			Order		
<input type="text"/>			<input type="text"/>		
Duration (min:s...)	<input type="text"/>	<input type="text"/>	Duration (min:s...)	<input type="text"/>	<input type="text"/>
Pupil Size (mm)	<input type="text"/>		Pupil Size (mm)	<input type="text"/>	
MD2	<input type="text"/> dB	MD1	<input type="text"/> dB	MD1	<input type="text"/> dB
MD3	<input type="text"/> dB	MD4	<input type="text"/> dB	MD4	<input type="text"/> dB
MS	<input type="text"/> dB	sLV	<input type="text"/> dB	sLV	<input type="text"/> dB
MD	<input type="text"/> dB	CsLV	<input type="text"/> dB	CsLV	<input type="text"/> dB
Report	<input type="text"/>		Report	<input type="text"/>	

A Scan and IOL Calculation

Exam Test Library Category: Minor Surgical Procedures

Eye Evaluated	<input type="text"/>		
Formula	<input type="text"/>	Axial Length	<input type="text"/>
Eye Status	<input type="text"/>	H Power	<input type="text"/>
Ant Chamber Depth	<input type="text"/>	V Power	<input type="text"/>
Lens Name	<input type="text"/>	IOL Power	<input type="text"/>
Refraction: Sphere	<input type="text"/>	Cyl	<input type="text"/>
		Axis	<input type="text"/>
		H Meridian	<input type="text"/>
		V Meridian	<input type="text"/>
		Est Refraction	<input type="text"/>
		Target Refraction	<input type="text"/>

A Scan Axial Length

Exam Test Library Category: Minor Surgical Procedures

	OD	OS
Axial Length	<input type="text"/>	<input type="text"/>
Compression	<input type="text"/>	<input type="text"/>

Minor Surgical Procedure

Exam Test Library Category: Minor Surgical Procedures

Eye Treated	<input type="text"/>	Location	<input type="text"/>	Anesthesia	<input type="text"/>
Procedure					
<input type="text"/>					
Comments					
<input type="text"/>					

YAG Capsulotomy

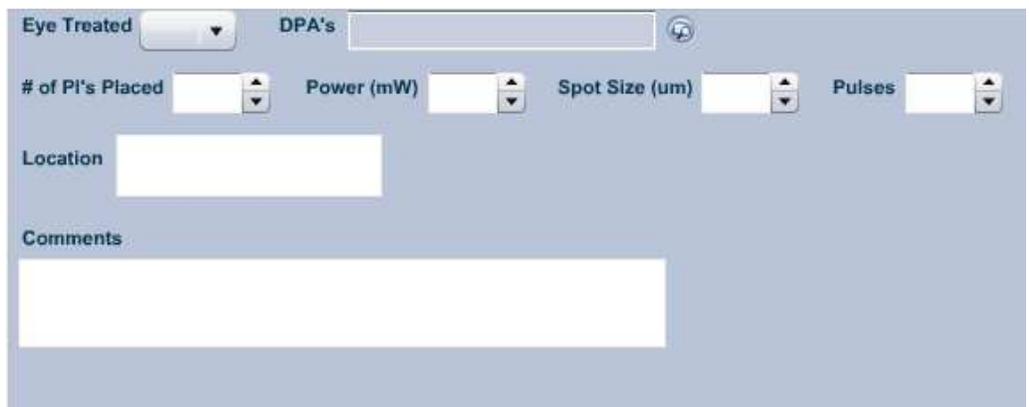
Exam Test Library Category: Minor Surgical Procedures



The screenshot shows a form for YAG Capsulotomy. It includes a dropdown menu for "Eye Treated", a text input for "DPA's" with a magnifying glass icon, and four spinners for "Pulses", "Power (mW)", "Spot Size (um)", and "Duration (sec)". Below these is a "Comments" section with a large white text area.

Peripheral Iridotomy

Exam Test Library Category: Minor Surgical Procedures



The screenshot shows a form for Peripheral Iridotomy. It includes a dropdown menu for "Eye Treated", a text input for "DPA's" with a magnifying glass icon, and four spinners for "# of PI's Placed", "Power (mW)", "Spot Size (um)", and "Pulses". Below these is a "Location" text input and a "Comments" section with a large white text area.

SLT

Exam Test Library Category: Minor Surgical Procedures



The screenshot shows a form for SLT. It includes a dropdown menu for "Eye Treated", a text input for "DPA's" with a magnifying glass icon, and five spinners for "Pulses", "Power (mW)", "Spot Size (um)", "Duration (sec)", and "Area Treated". Below these is a "Comments" section with a large white text area.

Cycloplegic Auto Refraction

Exam Test Library Category: Refractive

	Sphere	Cyl	Axis	Confidence
OD	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
OS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Cycloplegic Retinoscopy

Exam Test Library Category: Refractive

	Sphere	Cyl	Axis	Confidence
OD	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
OS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Reflex Quality	<input type="text"/>			

AQT – 10 Test

Exam Test Library Category: Color Vision

Congenital Color Deficiency

Acquired Red/Green Color Deficiency ...	Acquired Red/Green Color Deficiency OS
<input type="text"/>	<input type="text"/>
Acquired Blue/Yellow Color Deficiency ...	Acquired Blue/Yellow Color Deficiency ...
<input type="text"/>	<input type="text"/>

Stereo Reindeer Test

Exam Test Library Category: Stereo Test

Correct	Possible
<input type="text"/>	6
Suppression	
<input type="text"/>	

Tactile Tonometry

Exam Test Library Category: IOP/Pachs

	OD	OS
Impressi...	<input type="text"/>	<input type="text"/>
Time	<input type="text"/>	