![revolutionEHR - freedom to focus]

RevolutionEHR

6 Boulder Creek Circle
Madison, WI 53717

Phone: 877-738-3471
www.revolutionehr.com
customersupport@revolutionehr.com

RevolutionEHR Release 5.3.4

Release Notes

February 12th, 2012

Overview

This release of RevolutionEHR brings several new enhancements based on user feedback including duplicate patient check, documenting all tests on a screen as normal with one click, a new invoice search query tool, many other new features and fixes.

Table of Contents

1. Enhancements

1.1 Patient

1.1.1 Duplicate Patient Check

When adding a new patient to RevolutionEHR, the system will perform several checks to alert you if there is a possibility that a duplicate patient is being added.

RevolutionEHR will search for duplicate existing patients and alert you based on:

- Social Security Number Match
- First Name and Last Name Match
- Last Name and Date of Birth Match

The following Alert will be displayed giving you the option to continue adding the patient:
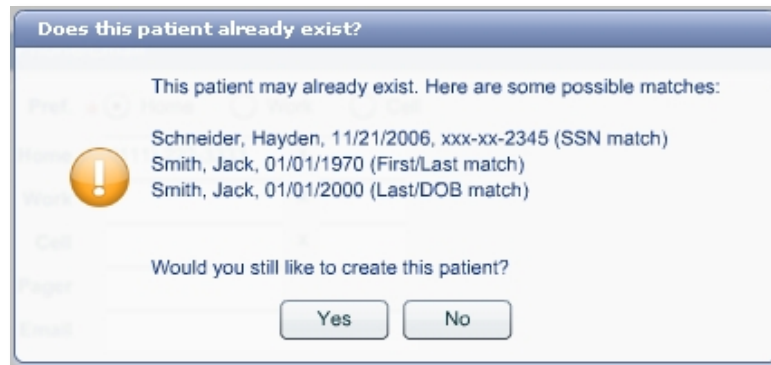
1.1.2 Patient Header Bar Tooltip

Patient Date of Birth, Salutation, Credentials, Suffix, and Nickname can now be easily viewed from the patient chart by using your mouse to hover over the left side of the patient header bar. This feature will allow anyone to access this information without the need to open demographics.
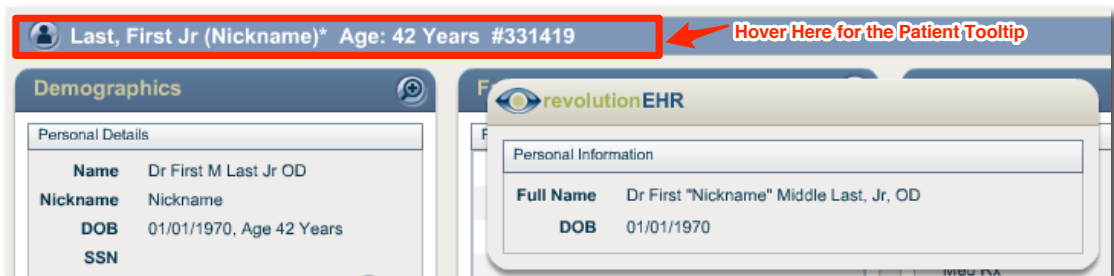
1.2 Scheduling

1.2.1 Schedule Grouping for Employees

The schedule grouping feature has been expanded to allow employee scheduled items to be visually grouped as well. You can enable grouping on the schedule by clicking Grouping on the schedule header bar (see screenshot below). This will allow Provider and Employee schedule items to be grouped separately.

Tip for Grouping Schedule: *If you would like Grouping to be enable by default for your practice, go the Practice Preferences page under Administration -> General -> Practice Preferences -> Additional Preferences*

1.3 Electronic Health Record

1.3.1 Screen Normal Button

While each exam test built in RevolutionEHR has a Normal button to document your findings, the newest version of RevolutionEHR includes a Normal button for each test screen on the EHR. The screen Normal button saves time by updating all tests on the screen with one click and has the same effect as clicking normal for each individual test.
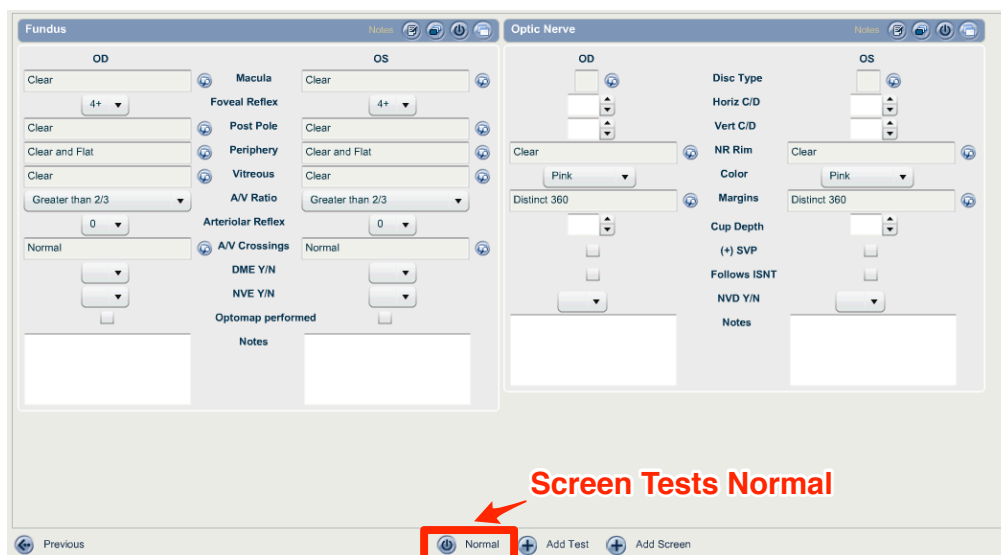
Note: You can also use CTRL-K (Windows) or COMMAND-K (Mac) on you keyboard to document all tests on the screen as normal.
The Normal button has been added to the bottom each test screen in the EHR.

Special advice from Dr. Chuck Brownlow, optometry documentation specialist:

In the physical examination, as with all parts of the patient encounter, it is important to do only the tests that are related to the patient's reason for visit and necessary for diagnosis and management of the patient's conditions, and to indicate in the patient's record the results of all that is done during the visit. Of course, RevolutionEHR permits you to enter data for all tests that have positive results. RevolutionEHR now also enables you to automatically enter "Normal" for all tests on one screen for which you found nothing abnormal or positive.   The "Normal" function works for all tests showing on each screen as you proceed through the physical examination, and the use of this function should be carefully overseen by the doctor to be sure that each test that receives documentation was actually performed for the patient.

Screen Tests Normal

1.3.2 Growth Chart Printing

The Patient Growth Chart can be viewed by clicking the Growth Chart button on the Vitals test in the EHR. A print button has been added to the lower right hand corner of Growth Chart screen to allow the chart to be printed.
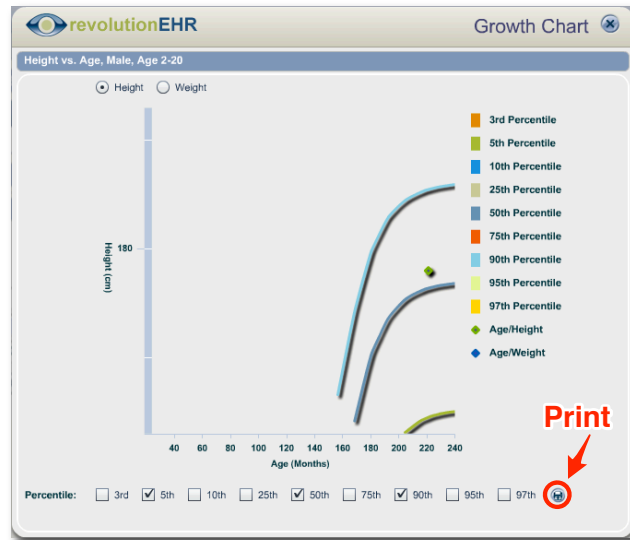
1.4   Accounting and Insurance Claims

1.4.1 Invoice Query Builder for Accounting

Similar to the Patient Search Query in the Marketing section, the newest version has a powerful invoice query builder allowing you to build custom accounting reports within RevolutionEHR. The new Invoice query builder will allow you and your staff to search for Invoices and Invoice Items based on over 100 criteria available in RevolutionEHR.

You can access the new query builder on the Accounting Reports screen, just click 'Other' reports and select 'Invoice Search' or 'Invoice Item Search' based on your needs

Patient Search (Available in Marketing Module) is used to generate a report or list of patients meeting specified criteria.

Invoice Search (Accounting Reports) is used to generate a report or list of invoices meeting specified criteria. Keep in mind that a patient may have multiple invoices so duplicate patients can be expected.

Invoice Item Search (Accounting Reports) can be used to generate a report or list of invoice line items meeting specified criteria.

Most of the criteria currently available in Patient Search is available for a Invoice / Invoice Item search query, including these categories:

- Patient Demographics
- Patient Key Dates
- Patient Alerts
- Patient Account
- Patient Communication
- Patient Category
- Patient Insurance
- Patient Diagnoses
- Patient Medications
- Patient Eyeglass and Contact Lens Rx
- Patient Labs / Imaging
- Patient Appointments
- Patient Performed Services
- Patient Referred Out

To create your first Invoice or Invoice Item Search Query, go to **Accounting Reports** in the Accounting Module and select 'Other' reports in the top right hand corner.
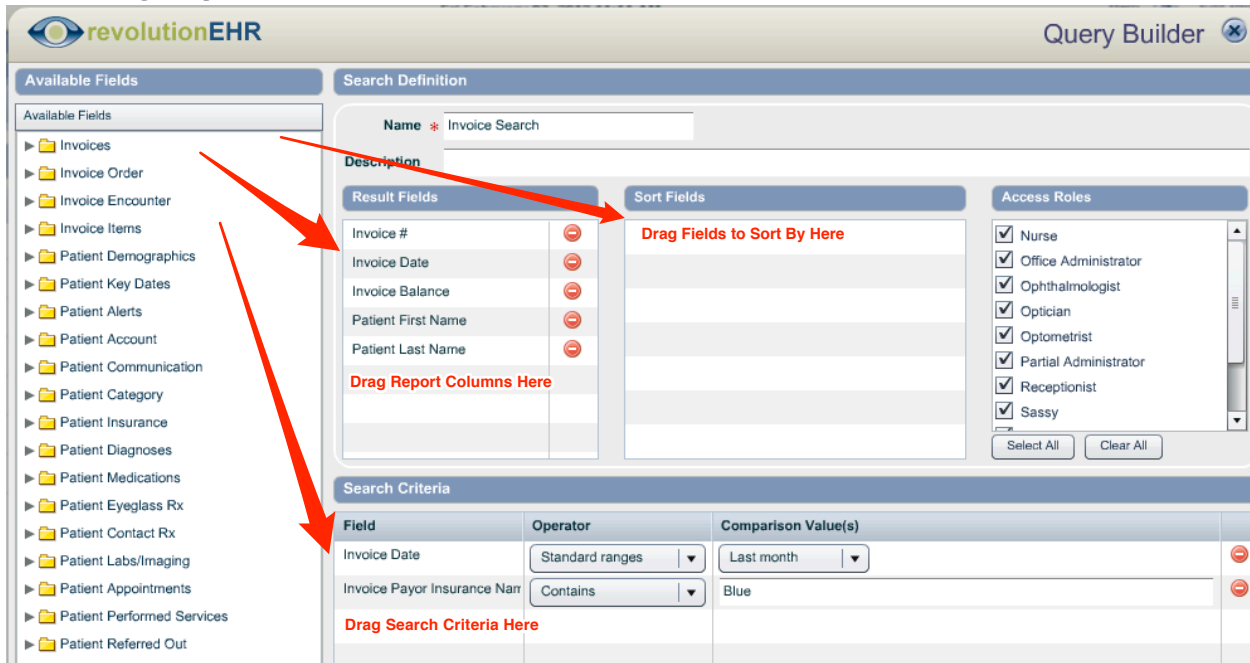
You will notice the two new options at the bottom of the Available Reports section, select one of these reports and click the 'Add' button to create a new query or click the 'Edit' button to open an existing query.
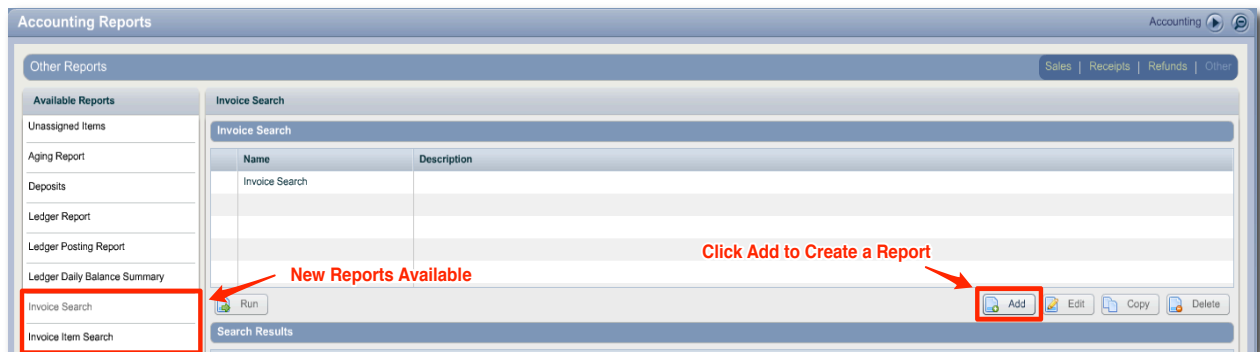
You will now see the Query Builder Screen. You can build a new query in a few simple steps:

- You will notice several folders in the Available Fields section on the left, select one of the folders to view the items in that category that can be used for your report.
- Drag any field to the 'Result Fields' section that you would like to show up as columns on your report.
- Drag any field to the 'Search Criteria' section to filter or limit the results in your report. You can use filters to get a very specific set of results like invoice date ranges, specific zip codes, appointment dates and much more.
- To save a report, you will need to have added at least one field in the 'Results Fields' area AND one field in the 'Search Criteria' area.
- If you would like to sort your results, you can drag any fields to the 'Sort Fields' section and set the sort by Ascending (ASC) or Descending (DSC) order.
- When you are finished building the report, click the Save button.
- After your report is built, you can run your saved report at anytime by selecting the report on the Other Reports screen and clicking the 'Run' button.

Invoice Query Builder Screen

To run a report, select the report and click the Run button. Your results will be displayed below, you can export the report in .CSV format by clicking the **Export** button or Print Address labels by clicking the **Labels** button.
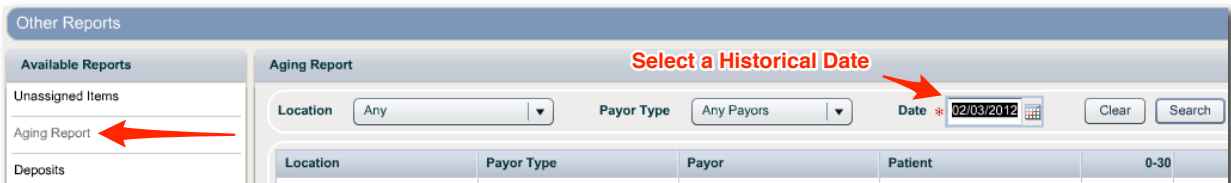

Tip: The Labels button will not be active unless all needed Address information has been included in the report (Patient Name, Address, City, State, and Zip Code)
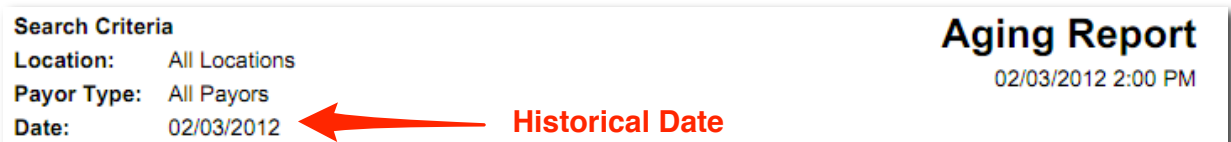
1.4.2 Historical Aging Report

RevolutionEHR offers the ability to generate an Invoice Aging report in the 'Other' section of Accounting Reports. The Aging report has been updated so that a previous date may be selected for a historical aging report.

When running an Aging report, just select a historical date if needed. Please note that historical aging reports cannot be run prior to 1/1/2012.

When printing the historical aging report, the date selected will also show on the printout as well.

1.5 Other Enhancements

1.5.1 Current Time Displayed within RevolutionEHR

The current time is now displayed within RevolutionEHR on the top header bar next to the current date. You can easily check the time without having to minimize RevolutionEHR.

Tip: The time displayed is based on your local computer clock. If the time displayed is not correct, be sure to check your local computer date / time settings.
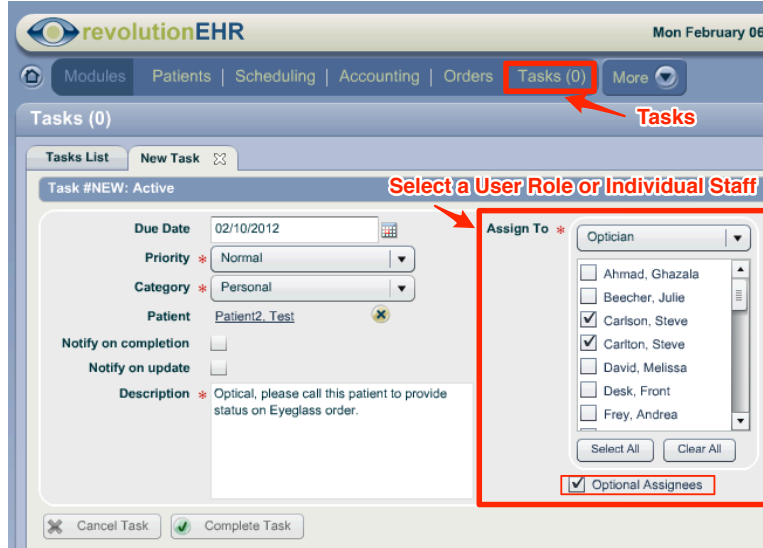
1.5.2 Assign Tasks to Multiple Users

The Tasks feature in RevolutionEHR has been expanded to allow each task to be assigned to multiple users in the practice. The new feature will allow you and your staff to share, accept and complete tasks within RevolutionEHR.

Creating a New Task

- Create a New Task by going to the 'Tasks' module near the top of RevolutionEHR and then clicking the 'Add Task' button in the bottom right hand corner.

- On the New Task window enter the required information including: Priority, Category and Description. You can also add optional information including Due Date, Patient, and to indicate whether or not you would like to be notified when the task has been updated or completed.

- You can assign the task by selecting a user role or to specific employees.

  o To assign the task based on user role, select a role from the 'Assign To' dropdown. This will automatically select employees based on the user roles setup for your practice. If would like to add or remove employees for the task, just check or uncheck their name.

  o To assign the task to specific employees, just click the checkbox next to each name you would like the task to be sent to.

- Selecting 'Optional Assignees' will send an unassigned task to everyone selected, giving each employee the option to accept the task. The unassigned task will be displayed in selected users' tasks lists until someone accepts the task.
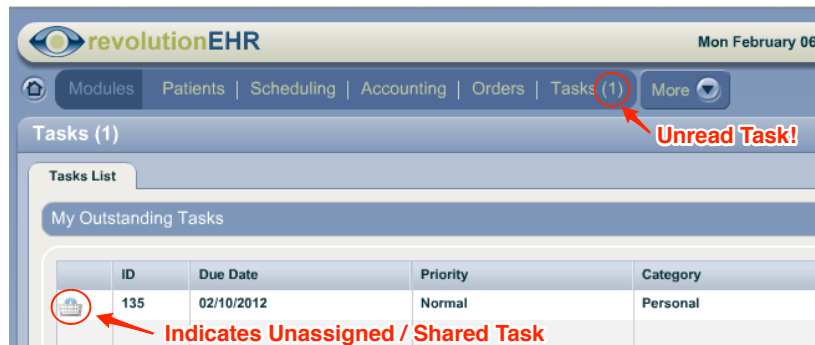

Note: If 'Optional Assignees' is not selected, each selected employee will be assigned a separate task with the same information

If a task has been assigned to you there will be an indicator next to the 'Tasks' module at the top of RevolutionEHR showing a count of unread tasks you have in your task list.

Accepting your Task

- Click on the 'Tasks' module at the top of RevolutionEHR to view your task list.

- The Tasks screen will bring up a list of tasks in your inbox, any **bold** tasks are unread, and tasks with a shopping basket icon to the left are unassigned.

- Double click the unassigned task to view more detail.
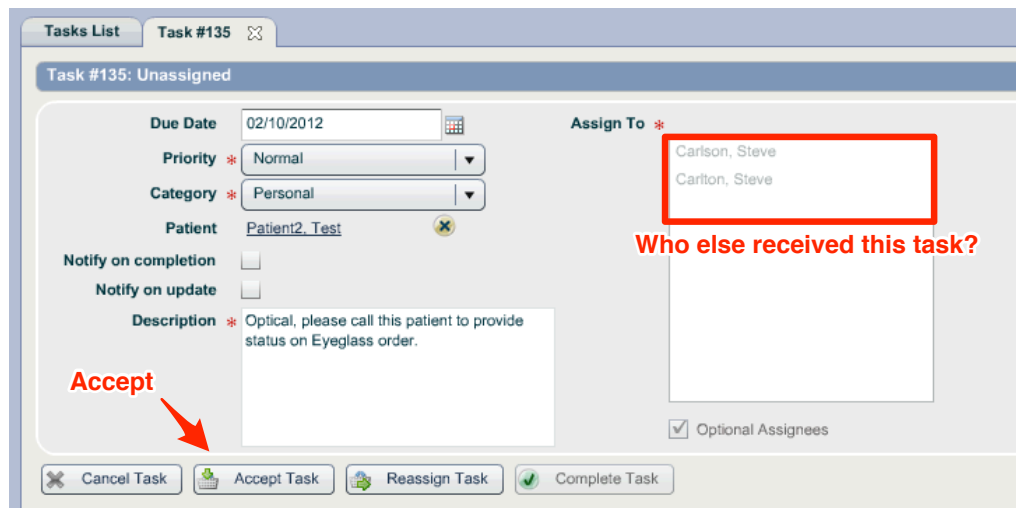
- On the task details screen, you can view the entire task and verify if other employees received the task.
- You have several options to handle the task:
  - To <u>accept</u> the task click the 'Accept Task' button which will give you ownership of the task and remove the task from everyone else's tasks list.
  - To <u>edit</u> the task, you must first accept the task then click 'Edit'.
  - To <u>leave the task unassigned</u>, click the 'Close' button.
  - To <u>reassign</u> the task, click the 'Reassign Task' button to add or remove any employees to the task. Leave 'Optional Assignees' checked to leave the task as unassigned.

1.5.3 Expanded Inventory Category View

When opening the Inventory screen under 'More' in RevolutionEHR, the product and service categories on the left will be expanded by default for easier access.

2. Fixes

2.1 Performance Enhancements

2.1.1 Login Process Optimizations

Several backend optimizations were made to the login process to decrease load time upon login.

2.1.2 Accounting Report Optimizations

Several backend optimizations were made to the Accounting Reports area to decrease load time while running reports.

2.1.3 Audit Log Optimizations

Several backend optimizations were made to the Audit Log area to decrease load time while running reports.

When running an Audit Log search, a patient or date range now must be selected. This measure was put in place to avoid pulling extremely large amounts of data by accident.

2.2 Patient

2.2.1 Today's Patients List

The Today's Patients list displayed in the patient module while searching for patients was not sorted correctly when selecting a column in the header bar to sort by. The list is sorted chronologically by default, but clicking on the preferred column in the header bar will now yield a correct sort of patients.

2.2.2 Downloading Files in Google Chrome

Some users noticed an issue downloading files from a patient's Documents and Images file while using Google Chrome. The issue has been resolved with this release.

2.2.3 Historical Rx on View Encounter

When using the View Encounter feature, the Historical Rx was displayed incorrectly on the generated report. This issue has been resolved with this release.

2.2.4 Medical Rx Refills

When generating a refill for a Medical Rx, the Authorization button was not needed on the screen. The Update button will automatically authorize the refill, therefore the Authorize button has been deactivated with this release while refilling a Medical Rx.

2.3 Accounting and Claims

2.3.1 Secondary Claim Information

When adding a Secondary Claim payor on the Additional Claim Information slider of an Insurance invoice, insurances were available for selection despite being marked Inactive in RevolutionEHR. This issue has been resolved and inactive insurance payors cannot be selected in the Secondary Claim dropdown.

2.3.2 Transferring Balances for Claim Denied Reasons

When transferring balances from an insurance invoice and certain 'Claim Denied' reasons were selected, RevolutionEHR was transferring all line items to the new invoice. Starting with version 5.3.4 individual line items will not be transferred to the new invoice to reduce confusion, only one line item will be created on the new invoice indicating the transfer amount and the reason for transfer.

ID	Post Date	Code	Diagnoses	Modifiers	Description
2369	02/03/2012	TRANSFER-IN			Claim Denied - Non covered service (Amount: $45.00, Orig Inv. #: 33, Service Date: 01/21/2010)

2.4 Administration

2.4.1 Creating User Roles

When creating a new user role, an issue was causing the new role to be displayed incorrectly once added to RevolutionEHR. This issue has been resolved and all roles are now displayed correctly after being created.

2.4.2 Added V58.69 as a Common Diagnosis by Default

V58.69 (Long-term (current) use of other high risk medications) has been added as a common diagnosis for existing practices as well as new practices.

2.5 Marketing

2.5.1 Patient Search – Eyeglass Rx / Contact Lens Rx Fields

An issue caused certain Patient Search queries to produce an error message when some Either/Both filters were used in the Eyeglass Rx or Contact Lens Rx categories for the query. The issue has been resolved with this release.

2.5.2 Patient Search – Key Dates

When using certain key dates fields in a patient search, fields with times were displayed in a 24-hour time format. The fields have been updated to display the 12-hour format (Example 09:00 AM)

2.6 Eyeglasses and Contact Lenses

2.6.1 Multifocal Segment Height

The maximum segment height allowed on an eyeglass order has been increased to 40 mm.

2.6.2 Rigid Gas Permeables

When entering an RGP prescription, the maximum BC I and BC II allowed has been increased to 80.0