



RevolutionEHR

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RevolutionEHR Release Notes

Version 5.4.4

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Table of Contents

1. Enhancements	3
1.1 Accounting	3
1.2 EHR	11
1.3 Meaningful Use for 2013	12
1.4 Scheduling	13
2. Fixes.....	13
2.1 Administration	13
2.2 EHR	13
2.3 PHR.....	14
2.4 Inventory.....	14

1. Enhancements

1.1 Accounting

OVERVIEW: The ability to post a payment as a negative amount has been added. This feature is intended to enhance the ability to post insurance payments when a recoupment has been made by the insurance company.

IMPORTANT NOTE: In accounting, a payment amount is entered by the user as a positive number, however in the calculation it is calculated as a negative amount. Therefore a payment entered as a negative number will be calculated as a positive amount related to the balance. This means that a negative payment will *increase* the balance on the item/invoice. This balance must then be written off.

RECOMMENDATION: Although not a requirement, it is recommended that the user write off the recoupment amounts separate from the standard write offs, this will allow for tracking and reporting directly related to recoupment totals.

If you choose to write off your recoupment amounts separate from the standard write off amounts, create a new write off reason for insurance recoupment. New write off reasons can be added in Administration/Data Configuration/Accounting/Write Off Reasons.

RESTRICTION: When posting payments by "line item", the individual balance on each item is increased by the negative payment amount entered for that item. This allows the user the ability to post a write off amount that is higher than the extended price of that item to account for the recoupment. However, if you have chosen not to post payments by line item but will still be posting transfers by line item, the new higher balance on the invoice is not available for adjustment until that payment has been posted using the apply payments button. For that reason, if you choose to *not* post payments by line item with line item transfers, the write off for recoupment must be completed in a separate step.

1.1.1 Negative payment posting by line item:

Negative payment amounts may be posted to individual line items even if the total payment for the invoice is a positive amount. This allows the user the ability to enter recoupment amounts as reflected on the EOB for each item. The net payment amount for the invoice is the sum of the negative and positive payments applied by line item. In the example below the total payment for this invoice will be \$150:

Payment Items

Payment and transfer information for invoice #1795

Transfer Type: Transfer Write-off

Transfer To: Patient Insurance

Include all items in transfer:

Add Transfer / Write-off

#	Code	Description	Price	Payment	Adj	Discounts	Tax	Ext. Price	Payment	Adjustments	Paid	Balance
8078	V2783	Lab Supplied H				\$0.00	\$0.00	\$50.00	-\$25.00	-\$50.00	-\$25.00	\$25.00
8080	V2750	Soderburg AR	50.00	-\$25.00		\$0.00	\$0.00	\$80.00	-\$25.00	-\$80.00	-\$25.00	\$25.00
8079	V2702	Lab Supplied P				\$0.00	\$0.00	\$25.00	\$0.00	-\$25.00	\$0.00	\$0.00
8077	V2200	Lab Supplied b				\$0.00	\$0.00	\$25.00	\$25.00	\$0.00	\$25.00	\$35.00
8076	V2200	Lab Supplied b	80.00	-\$25.00		\$0.00	\$0.00	\$80.00	\$25.00	\$0.00	\$25.00	\$35.00
8075	V2020	More Frames In				\$0.00	\$0.00	\$190.00	\$150.00	-\$25.00	\$150.00	\$15.00
			25.00	\$0.00								
			60.00	\$25.00								
			60.00	\$25.00								
			90.00	\$150.00								
TOTALS									\$150.00	(\$180.00)	\$150.00	\$135.00

Invoice Paid: \$150.00

Current Balance: \$28.00
 Invoice Paid: \$150.00
 Items Paid: \$150.00
 Amount Transferred: \$0.00
 After Payments and Transfers: \$135.00

The net result of individual line item payments may also equal a *negative* total amount. In the example below the net payment for the invoice will be -\$50.00

Payment Items

Payment and transfer information for invoice #1788

Transfer Type: Transfer Write-off

Transfer To: Patient Insurance

Include all items in transfer:

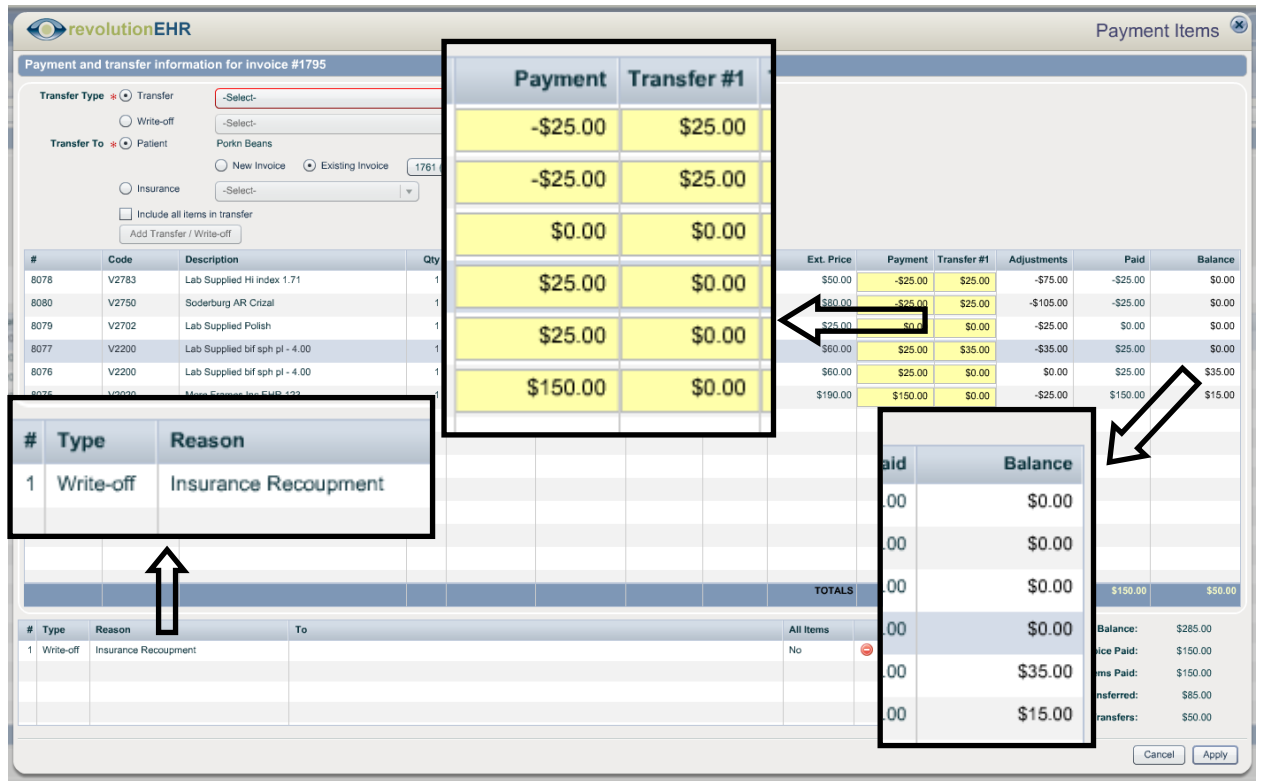
Add Transfer / Write-off

#	Code	Description	Price	Payment	Adj	Discounts	Tax	Ext. Price	Payment	Adjustments	Paid	Balance
8047	V2783	Lab Supplied Hi index 1.71		-\$50.00		\$0.00	\$0.00	\$50.00	-\$50.00	-\$50.00	-\$50.00	\$50.00
8048	V2702	Lab Supplied Polish				\$0.00	\$0.00	\$25.00	-\$25.00	-\$25.00	-\$25.00	\$25.00
8046	V2201	Lab Supplied bif sph 4.12-		-\$25.00		\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00
8045	V2201	Lab Supplied bif sph 4.12-				\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00
8044	V2020	More Frames Inc EHR 123				\$0.00	\$0.00	\$190.00	\$25.00	-\$30.00	\$25.00	\$135.00
				\$0.00								
				\$0.00								
				\$25.00								
TOTALS									(\$50.00)	(\$165.00)	(\$50.00)	\$10.00

Invoice Paid: -\$50.00

Current Balance: \$80.00
 Invoice Paid: -\$50.00
 Items Paid: -\$50.00
 Amount Transferred: \$0.00
 After Payments and Transfers: \$30.00

Adjusting for the recoument amounts: In the example below the balances that were increased as a result of the negative payments are being written off and associated to a write off reason for "Insurance Recoument" resulting in a balance of \$0.00 for those items where a negative payment was applied. Note that there are still some items left on this invoice with a balance. These balances reflect amounts that are contractual write offs and will later be written off with a separate standard write off reason:



Payment and transfer information for invoice #1795

Transfer Type: Transfer Write-off

Transfer To: Patient Insurance

Include all items in transfer:

Payment	Transfer #1
-\$25.00	\$25.00
-\$25.00	\$25.00
\$0.00	\$0.00
\$25.00	\$0.00
\$25.00	\$0.00
\$150.00	\$0.00

#	Type	Reason
1	Write-off	Insurance Recoument

Ext. Price	Payment	Transfer #1	Adjustments	Paid	Balance
\$50.00	-\$25.00	\$25.00	-\$75.00	-\$25.00	\$0.00
\$80.00	-\$25.00	\$25.00	-\$105.00	-\$25.00	\$0.00
\$25.00	\$0.00	\$0.00	-\$25.00	\$0.00	\$0.00
\$60.00	\$25.00	\$35.00	-\$35.00	\$25.00	\$0.00
\$60.00	\$25.00	\$0.00	\$0.00	\$25.00	\$35.00
\$190.00	\$150.00	\$0.00	-\$25.00	\$150.00	\$15.00
TOTALS					\$0.00

Paid	Balance
00	\$0.00
00	\$0.00
00	\$0.00
00	\$0.00
00	\$35.00
00	\$15.00

Balance: \$285.00
 Amount Paid: \$150.00
 Amounts Paid: \$150.00
 Amounts Transferred: \$85.00
 Amounts Transfers: \$50.00

The remaining balances are then written off using the standard write off reason normally selected for amounts written off due to contractual agreements with the insurance company:

Payment Items

Payment and transfer information for invoice #1795

Transfer Type: Transfer Write-off
 Transfer To: Patient Insurance
 Include all items in transfer

#	Code	Description	Qty	Unit Price	Sub-T	Price	Payment	Transfer #1	Transfer #2	Adjustments	Paid	Balance	
8078	V2783	Lab Supplied Hi index 1.71	1	\$50.00	\$8	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	-\$75.00	-\$25.00	\$0.00
8080	V2750	Soderburg AR Citzal	1	\$80.00	\$8	\$80.00	\$80.00	\$0.00	\$0.00	-\$105.00	-\$25.00	\$0.00	
8079	V2702	Lab Supplied Polish	1	\$25.00	\$2	\$25.00	\$0.00	\$0.00	\$0.00	-\$25.00	\$0.00	\$0.00	
8077	V2200	Lab Supplied bif sph pl - 4.00	1	\$60.00	\$6	\$60.00	\$25.00	\$35.00	\$0.00	-\$35.00	\$25.00	\$0.00	
8076	V2200	Lab Supplied bif sph pl - 4.00	1	\$60.00	\$6	\$60.00	\$25.00	\$0.00	\$35.00	-\$35.00	\$25.00	\$0.00	
8075	V2020	More Frames Inc EHR 123	1	\$190.00	\$19	\$190.00	\$150.00	\$0.00	\$15.00	-\$40.00	\$150.00	\$0.00	
TOTALS						\$1150.00	\$1150.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	

2 Write-off Third party discount - Fee reduced/Participat

#	Type	Reason	To	All Items
1	Write-off	Insurance Reassignment		No
2	Write-off	Third party discount - Fee reduced/Participat		No

Current Balance: \$285.00
 Invoice Paid: \$150.00
 Items Paid: \$150.00
 Amount Transferred: \$135.00
 Payments and Transfers: \$0.00

Cancel Apply

After all line item payments and transfers have been applied, the Receive Payment main screen will reflect the positive and negative payments appropriately:

Accounting

Accounting Home Invoice #1788 Invoice #1791 Invoice #1795 Invoice #1798 New Payment

Payment Information

Apply Payments

Payer Name: VSP Ref / Check No.:
 Payment Amount: \$40.00 Payment Date: 12/15/2012
 Payment Method: Check Location: Revolution

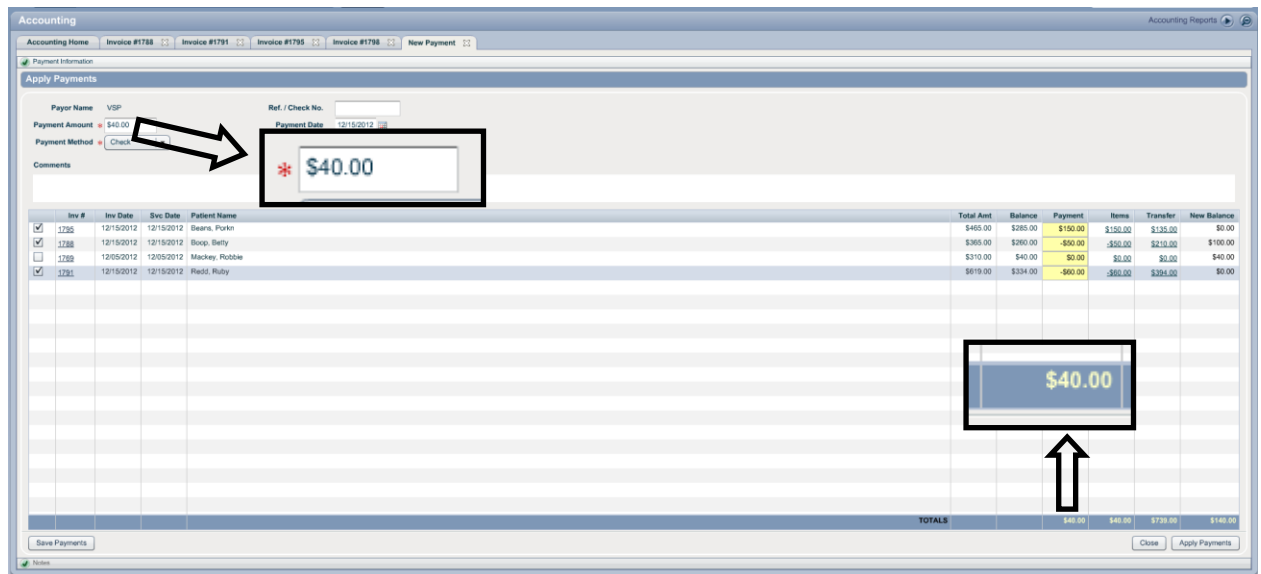
Comments

Inv #	Inv Date	Svc Date	Patient Name	Payment	Items	Transfer
1795	12/15/2012	12/15/2012	Bears, Pork	\$150.00	\$150.00	\$135.00
1788	12/15/2012	12/15/2012	Sloop, Betty	-\$50.00	-\$50.00	\$210.00
1789	12/05/2012	12/05/2012	Mackey, Robbie	\$0.00	\$0.00	\$0.00
1791	12/15/2012	12/15/2012	Wadd, Ruby	-\$60.00	-\$60.00	\$394.00
TOTALS				\$40.00	\$40.00	\$739.00

Total Amt	Balance	Payment	Items	Transfer	New Balance
\$465.00	\$285.00	\$150.00	\$150.00	\$135.00	\$0.00
\$285.00	\$285.00	-\$50.00	-\$50.00	\$210.00	\$100.00
\$100.00	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00
\$619.00	\$334.00	-\$60.00	-\$60.00	\$394.00	\$0.00

Save Payments Close Apply Payments

The total payment applied on each invoice will then equal the total payment amount entered at the top of the receive payment screen:



Accounting Home Invoice #1788 Invoice #1781 Invoice #1795 Invoice #1798 New Payment Accounting Reports

Payment Information

Apply Payments

Payor Name VSP Ref. / Check No.

Payment Amount \$40.00 Payment Date 12/15/2012

Payment Method Check

Comments * \$40.00

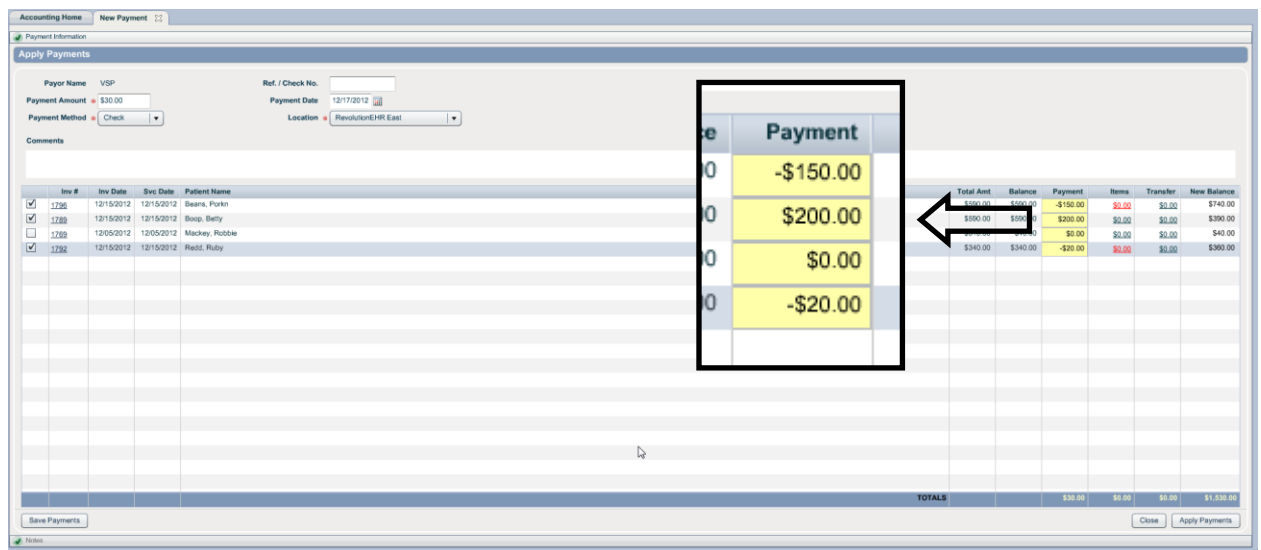
Inv #	Inv Date	Svc Date	Patient Name	Total Amt	Balance	Payment	Items	Transfer	New Balance
1785	12/15/2012	12/15/2012	Beans, Purin	\$465.00	\$285.00	\$150.00	\$150.00	\$135.00	\$0.00
1788	12/15/2012	12/15/2012	Boop, Betty	\$285.00	\$285.00	-\$80.00	\$0.00	\$215.00	\$140.00
1789	12/05/2012	12/05/2012	Mackey, Robbie	\$310.00	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00
1791	12/15/2012	12/15/2012	Reid, Ruby	\$619.00	\$334.00	-\$60.00	\$60.00	\$294.00	\$0.00

TOTALS \$40.00 \$40.00 \$739.00 \$140.00

Save Payments Close Apply Payments

1.1.2 Negative payment posting without line item payments when line item transfer is also disabled:

When posting a negative payment when you have the line item payments preference set to "None" and have turned off line item transfer, begin by posting the payments including negative payments as needed.:



Accounting Home New Payment Accounting Reports

Payment Information

Apply Payments

Payor Name VSP Ref. / Check No.

Payment Amount \$30.00 Payment Date 12/17/2012 Location RevolutionEHR East

Payment Method Check

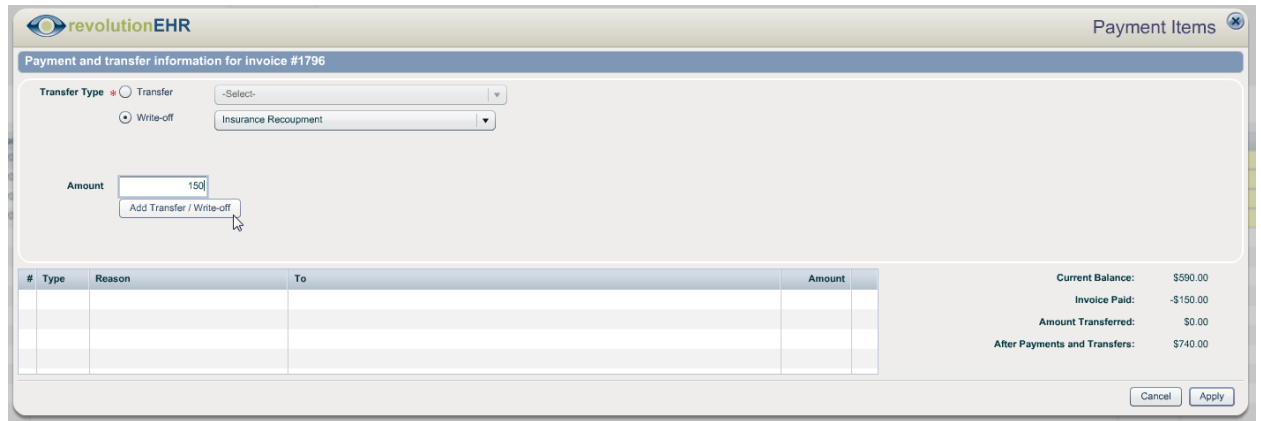
Comments

Inv #	Inv Date	Svc Date	Patient Name	Total Amt	Balance	Payment	Items	Transfer	New Balance
1785	12/15/2012	12/15/2012	Beans, Purin	\$465.00	\$500.00	-\$150.00	\$0.00	\$0.00	\$740.00
1789	12/15/2012	12/15/2012	Boop, Betty	\$285.00	\$500.00	\$200.00	\$0.00	\$0.00	\$300.00
1789	12/05/2012	12/05/2012	Mackey, Robbie	\$310.00	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00
1792	12/15/2012	12/15/2012	Reid, Ruby	\$619.00	\$340.00	-\$20.00	\$0.00	\$0.00	\$360.00

TOTALS \$30.00 \$0.00 \$0.00 \$1,530.00

Save Payments Close Apply Payments

You may then post your write offs and transfers. If you wish to separate recoupment write offs from standard write offs, start by adding the write off for insurance recoupment:



Payment and transfer information for invoice #1796

Transfer Type: Transfer Write-off

Reason: Insurance Recoupment

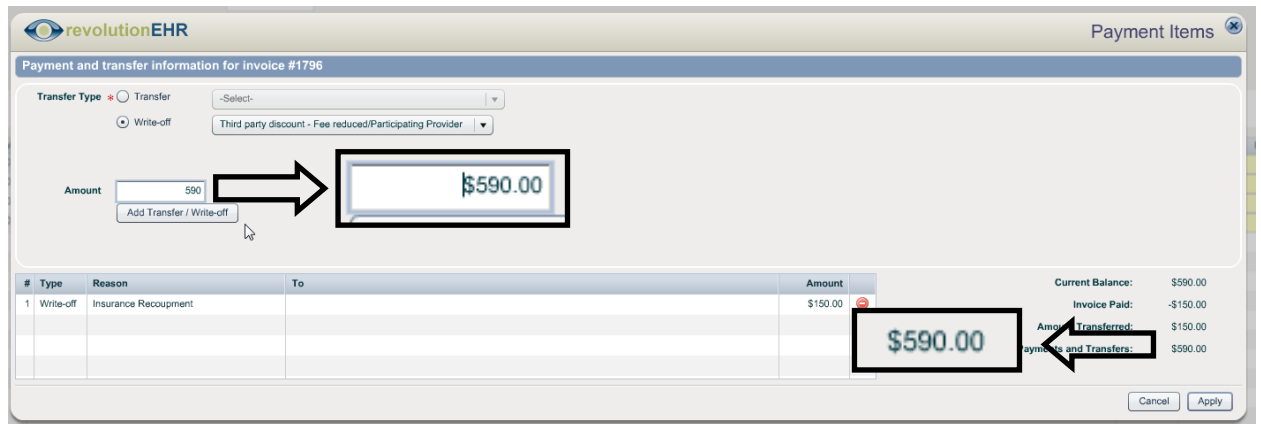
Amount: 150

#	Type	Reason	To	Amount

Summary:

- Current Balance: \$590.00
- Invoice Paid: -\$150.00
- Amount Transferred: \$0.00
- After Payments and Transfers: \$740.00

You may then post a second write off for your standard write off amount which should be equal to the balance found in the bottom right for "After Payments and Transfers". *Note that if there are any transfers to secondary or patient these should be applied prior to doing this final write off:*



Payment and transfer information for invoice #1796

Transfer Type: Transfer Write-off

Reason: Third party discount - Fee reduced/Participating Provider

Amount: 590

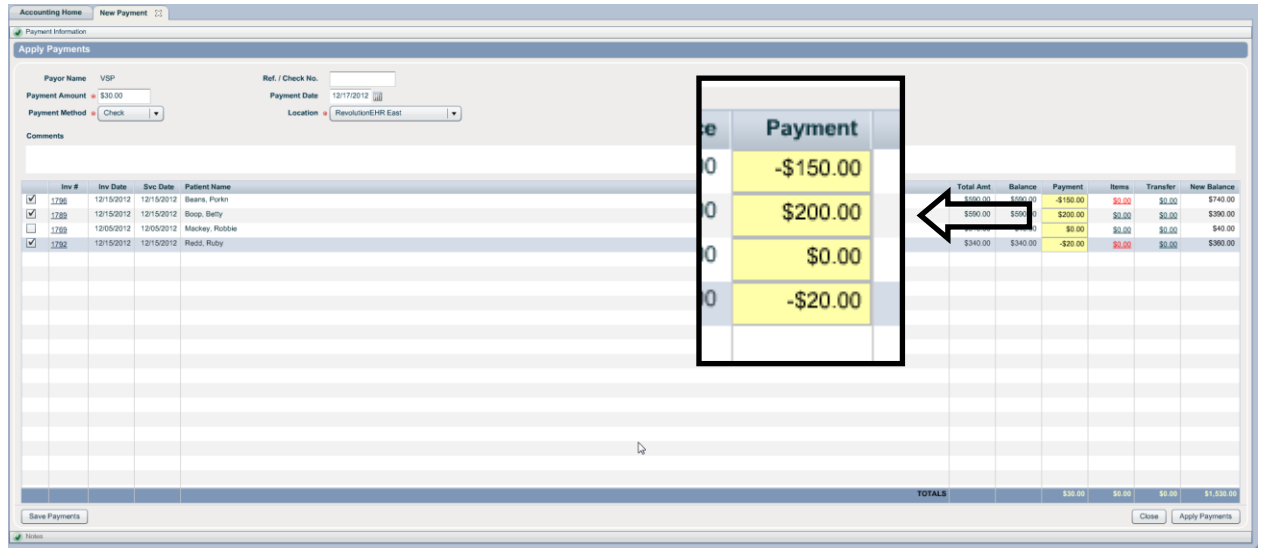
#	Type	Reason	To	Amount
1	Write-off	Insurance Recoupment		\$150.00

Summary:

- Current Balance: \$590.00
- Invoice Paid: -\$150.00
- Amount Transferred: \$150.00
- After Payments and Transfers: \$590.00

1.1.3 Negative payment posting without line item payments when still using line item transfers:

When posting a negative payment when you have the line item payments preference set to "Optional" but still have line item transfers set to "Yes", begin by posting the payments and standard write offs as normal, including negative payments as needed.:



The screenshot shows the 'Apply Payments' interface. At the top, there are fields for 'Payor Name' (VSP), 'Payment Amount' (\$30.00), 'Payment Date' (12/17/2012), and 'Location' (RevolutionEHR East). Below this is a table of invoices with columns for 'Inv #', 'Inv Date', 'Svc Date', and 'Patient Name'. The table contains four rows of data. To the right of the invoice table is a summary table with columns for 'Total Amt', 'Balance', 'Payment', 'Items', 'Transfer', and 'New Balance'. A black box highlights the 'Payment' column in the invoice table, and an arrow points from this box to the 'Payment' column in the summary table.

Inv #	Inv Date	Svc Date	Patient Name	Payment
1780	12/15/2012	12/15/2012	Bears, Pirkn	-\$150.00
1780	12/15/2012	12/15/2012	Boop, Betty	\$200.00
1780	12/05/2012	12/05/2012	Mackey, Robbie	\$0.00
1782	12/15/2012	12/15/2012	Reid, Ruby	-\$20.00

Total Amt	Balance	Payment	Items	Transfer	New Balance
\$500.00	\$500.00	-\$150.00	\$0.00	\$0.00	\$740.00
\$500.00	\$500.00	\$200.00	\$0.00	\$0.00	\$300.00
\$340.00	\$340.00	\$0.00	\$0.00	\$0.00	\$40.00
\$340.00	\$340.00	-\$20.00	\$0.00	\$0.00	\$300.00

Because this option includes a combination of line items functions (the transfers) along with invoice level functions (the non-line item payment) there is not a way to apply the recoupment write off amounts from the Receive Payment screen. For this combination option begin by using the "Transfer" hyperlink apply the standard write offs and transfers.

Any write off amount for the recoupment (the amount equal to the negative payment) will have to be done to the individual invoices in a separate step. For this reason you may find it easier to post payments by line item during the payment posting process to avoid the extra step needed to write off the recoupment amounts. However, if you do not apply line item payments, then at this time apply only standard write off and transfer amounts. Without applying line item payments you will be unable to post the additional recoupment write offs at this time.

In the example below take note that although the individual line item balances equal 0.00 there is still an invoice balance remaining. This is the result of the negative payment and must be written off in a separate step to the individual invoice:

Payment and transfer information for invoice #1796

Transfer Type: Transfer Write-off
 Transfer To: Patient Insurance
 Include all items in transfer

#	Code	Description	Qty	Unit Price	Sub-Total	Discounts	Tax	
8084	V2783	Lab Supplied Hi index 1.70	1	\$50.00	\$50.00	\$0.00	\$0.00	
8082	V2781	Essilor PAL Varilux Comfort	1	\$180.00	\$180.00	\$0.00	\$0.00	
8083	V2781	Essilor PAL Varilux Comfort	1	\$180.00	\$180.00	\$0.00	\$0.00	
8085	V2702	Lab Supplied Polish	1	\$25.00	\$25.00	\$0.00	\$0.00	
8081	v2020	Revolution Frames Rev 768	1	\$155.00	\$155.00	\$0.00	\$0.00	
TOTALS								
				\$0.00	\$590.00	(\$590.00)	\$0.00	\$0.00

Adjustments	Paid	Balance
		\$0.00
		\$0.00
-\$50.00	\$0.00	\$0.00
-\$180.00	\$0.00	\$0.00
-\$180.00	\$0.00	\$0.00
-\$25.00	\$0.00	\$0.00
-\$155.00	\$0.00	\$0.00

Current Balance: \$590.00
 Invoice Paid: -\$150.00
 Amount Transferred: \$590.00
 After Payments and Transfers: \$150.00

For any invoice where a negative payment was applied using line items transfer but *NOT* line item payments you must now go back to that individual invoice and use the "Transfer" button to write off the recoupment amount:

Accounting Home Invoice #1796

Invoice #1796 Authorized Bill To

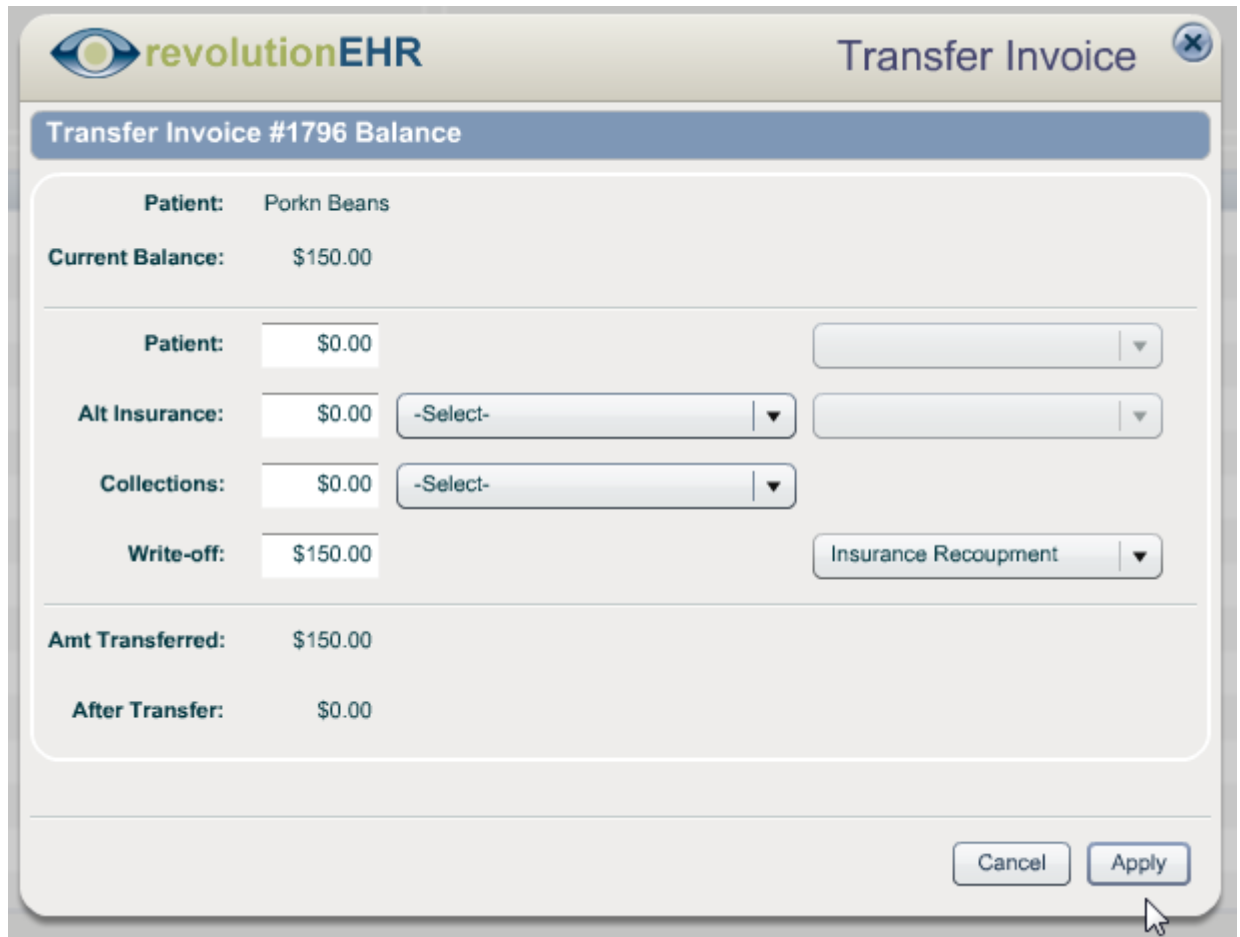
Inv Date: 12/15/2012 Location: RevolutionEHR East Patient: Reems, Porkin
 Inv Age: 1 days Provider: Meier, Clara
 Svc Date: 12/15/2012 Status: Active
 Fee Sch: Fee Date: Wisconsin

ID	Post Date	Code	Diagnosis	Modifiers	Description	Qty	Unit Price	Discounts	Tax	Ext Price	Adjustments	Paid	Balance
8081	12/15/2012	v2020			Revolution Frames Rev 768	1	\$155.00	\$0.00	\$0.00	\$155.00	(\$155.00)	\$0.00	\$0.00
8085	12/15/2012	V2702			Lab Supplied Polish	1	\$25.00	\$0.00	\$0.00	\$25.00	(\$25.00)	\$0.00	\$0.00
8082	12/15/2012	V2781			Essilor PAL Varilux Comfort	1	\$180.00	\$0.00	\$0.00	\$180.00	(\$180.00)	\$0.00	\$0.00
8083	12/15/2012	V2781			Essilor PAL Varilux Comfort	1	\$180.00	\$0.00	\$0.00	\$180.00	(\$180.00)	\$0.00	\$0.00
8084	12/15/2012	V2783			Lab Supplied Hi index 1.70	1	\$50.00	\$0.00	\$0.00	\$50.00	(\$50.00)	\$0.00	\$0.00

Show All Items

BALANCE DUE \$150.00

Additional Claim Information
 Payment History
 Statement History
 Notes



revolutionEHR Transfer Invoice

Transfer Invoice #1796 Balance

Patient: Porkn Beans

Current Balance: \$150.00

Patient: \$0.00

Alt Insurance: \$0.00 -Select-

Collections: \$0.00 -Select-

Write-off: \$150.00 Insurance Recoupment

Amt Transferred: \$150.00

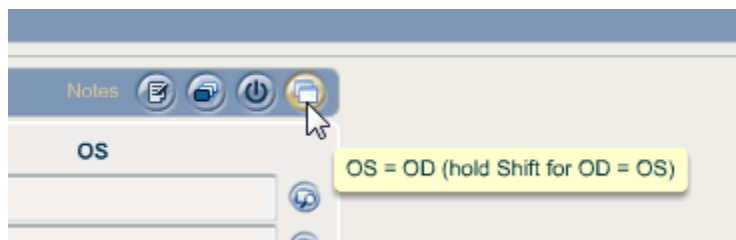
After Transfer: \$0.00

Cancel Apply

1.2 EHR

1.2.1 OD = OS

The current "OD = OS" button in the upper right corner of all exam tests can now be used to copy from left to right. Simply hold down the shift key while clicking on the button to reverse the function:



1.2.2 Multi-select scrolling

In a previous release the list accessed when using the multiselect buttons within exam tests were changed to automatically scroll the list down to reveal the options found below the item checked. Based on feedback stating that it was not beneficial, this feature has been removed. Checking a box within a multiselect list will no longer automatically scroll down.

1.3 Meaningful Use for 2013

Some new requirements for Meaningful Use reporting in 2013 have been defined by CMS. These changes will only affect the MU score card results when the date range is 2013. Results for 2012 will continue to use the CMS 2012 requirements

1.3.1 Stage 1 update to Core 1 - CPOE

The demoninator is now "unique patients with a medication order created by the eye care practioner during the reporting period"

1.3.2 Stage 1 update to Core 8 – Record Vital Signs

Vital Signs is being split into 3 calculations:

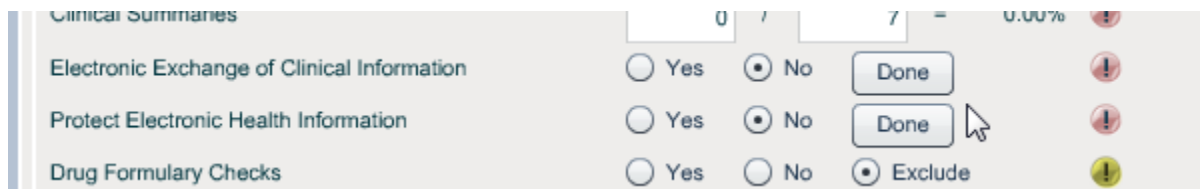
- The current calculation of all three vital signs with age changes as below
- Just blood pressure for patients 3 and over
- Just height and weight for all patients

1.3.3 Stage 1 update to Core 14 – Electronic Exchange of Information

Electronic Exchange of Information has been removed for 2013

1.3.4 Update to MU Scorecard

The ability to click a button to manually trigger a passing grade for Core 14 and Core 15 has been added

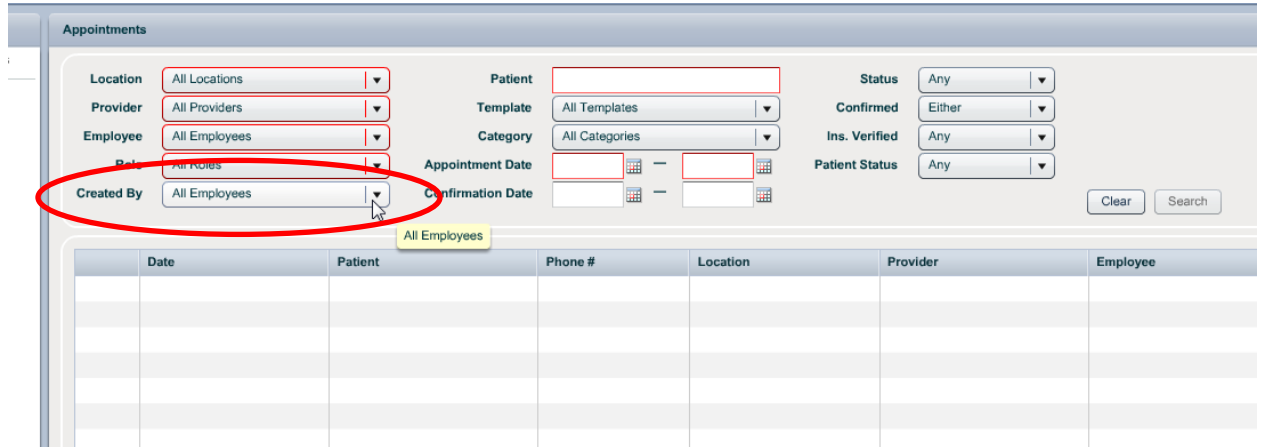


Item	Yes	No	Exclude	Action	Status
Electronic Exchange of Clinical Information	<input type="radio"/>	<input checked="" type="radio"/>		Done	! (Red)
Protect Electronic Health Information	<input type="radio"/>	<input checked="" type="radio"/>		Done	! (Red)
Drug Formulary Checks	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Exclude	! (Yellow)

1.4 Scheduling

1.4.1 Scheduling Reports

A new filter for "Created By" has been added to the current Scheduling Report for appointments. This filter will allow the user the ability to generate a list based on the employee that created the appointment



The screenshot shows the 'Appointments' report interface. The 'Created By' dropdown menu is highlighted with a red circle and a mouse cursor, showing 'All Employees' as the selected option. Other filters include Location, Provider, Employee, Patient, Template, Category, Appointment Date, Confirmation Date, Status, Confirmed, Ins. Verified, and Patient Status. A table with columns Date, Patient, Phone #, Location, Provider, and Employee is visible below the filters.

2. Fixes

2.1 Administration

2.1.1 PHR Access Code

When adding a new access code for PHR, the hyperlink for the newly added code will not be active until "Update" is clicked for that screen

2.2 EHR

2.2.1 RFV

A saving issue was occurring when the RFV screen was populated with data entered by the patient in the PHR if no additional data were entered by the user within the encounter. This issue has been resolved.

2.2.2 Empty screens

If a user accidentally included an empty screen within an encounter the app would continually spin when that screen was accessed within the encounter and a browser refresh would be required to resolve it. Although it would not be normal

to included an empty screen within an encounter, the issue related to a continually spinning clock has been resolved if an empty screen happens to exist.

2.3 PHR

2.3.1 Patient Preferences

Patients created in the early stages of the PHR implementation were given invalid scheduling preferences. This was not apparent until online scheduling was added to the PHR. All invalid preferences have been fixed.

2.4 Inventory

2.4.1 V codes

Imported Eyeglass Lenses for trifocals contained a lower case "v" in the HCPCS field. This has been fixed and replaced with an upper case "V"