

CooperVision

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Rev360 and CooperVision are product partners, working together to bring your practice seamless ordering of contact lenses through SmartFlow for Sight.

Contact CooperVision at www.coopervision.com or call 800.341.2020 for additional information.

Getting Started

CooperVision setup should not be completed until you have followed the instructions for Getting Started in the SmartFlow for Sight™ folder. Before orders can be transmitted directly to CooperVision, you must configure your account information within RevolutionEHR.

1. Access Admin > Vendors/Partners > Contact Lens Suppliers > open CooperVision.
2. Open the Location Configuration slider.
3. If all locations within your practice ARE listed in the grid, verify the information in the Account # and External/Ship-To # columns matches the instructions noted below in step 5.
4. If all locations within your practice are NOT listed in the grid, click 'Add,' select the appropriate location within the dropdown menu, and follow the instructions below in step 5.
5. Setup your CooperVision account information. **The following is required and must be entered before orders can be successfully transmitted to CooperVision:**

- **Account Number:** Your CooperVision account number is the number used to associate your account with CooperVision for billing and reporting purposes and can most commonly be found on your CooperVision statement. If you do not know your account number, contact **CooperVision** and request your practice location's account number.

IMPORTANT NOTE: Your CooperVision account number includes alpha and numeric characters and can be up to twelve digit, any leading 0 characters MUST be included.

800.341.2020

- **External/Ship To:** CooperVision assigns a unique account number to each practice location. Thus, do not complete the External/Ship-To# field.

- To ensure orders sent to CooperVision can be successfully transmitted, order validation verifies the Account # field has been populated. If this field is not populated, a warning message displays that indicates the account number is missing.

6. Click 'Save Changes.'

After setup is complete, it is our recommendation that you submit one or two orders to verify that configuration for your practice has been setup correctly. Once you can confirm the order was successfully received and approved by CooperVision, you are ready to transmit CooperVision orders through SmartFlow.

Contact Lens Orders

The workflow surrounding order creation, status updates, and billing is the same as non-CooperVision orders. Each section below will cover only those areas of the order affected by the CooperVision integration.

- **CooperVision will not send Ship-to-patient orders to a P.O. Box.**

Create Order

Supplier/Distributor

- Select SmartFlow from the Processor dropdown menu.
- Select CooperVision from the Name dropdown menu.

Quantity/Packaging

- Select packaging from the dropdown menu.

Color/Tint

- If the contact lens product associated to the Rx is available in colors, select the appropriate color. If the product is not available in colors, no color options will be available within the dropdown menu.

Approve Order

The action of approving orders has not changed. However, RevolutionEHR performs some order validation of SmartFlow orders before approving the order. Validation of the order must be successful before the order is updated to Approved. The following validation checks are performed:

- Rx does not pass validation.
- Vendor is not selected.
- Packaging is not selected.
- Color is not selected. Note: This is only required for lenses that have colors.
- Contact lens product indicated on the Rx has not been associated with SmartFlow.
- Quantity field is zero for both OD and OS.

Note: SmartFlow orders are validated upon Approve, for this reason the fields for Processor and Name within the Order Details slider can only be edited for New orders. Once the order has been Approved, these fields can no longer be edited.

Transmit Order

Orders can be transmitted to CooperVision as either a single order or a set of orders can be bundled into a batch. Since CooperVision starts processing contact lens orders when they receive them, shipping charges might be assessed for each individual order (depending on the timing of the order, the quantities included in the order, and the shipping arrangement and minimum orders your office might have with CooperVision). By submitting orders in a batch, you can potentially avoid additional shipping charges since all of the orders in the batch are considered a single shipment by CooperVision. If the batch contains orders that are shipped to different locations (e.g. a mixture of orders sent to the practice and orders sent directly to the patient), SmartFlow groups those orders for you into a single order per shipping address.

Transmit Batch

- Throughout the day, create and approve CL orders for CooperVision. However, **do NOT** Transmit the individual orders from the specific order screen.
- When you have enough orders (depending on your shipping contract with CooperVision, and/or you have reached the minimum threshold for shipping discounts), access the Orders Dashboard.
- Filter the order list for the orders you are ready to transmit. *Example*

#	Patient	Order Date	Type	Processor	Vendor	Ship To	Status	Status Date	Comments
<input checked="" type="checkbox"/>	7525 Trotter, Marcia	06/18/2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	
<input checked="" type="checkbox"/>	7522 Goede, Janet	06/18/2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	

- Select the checkbox in the rows that contain the CooperVision orders that need to be transmitted. To check all orders in the list, check the checkbox at the top of the left column in the order list grid.

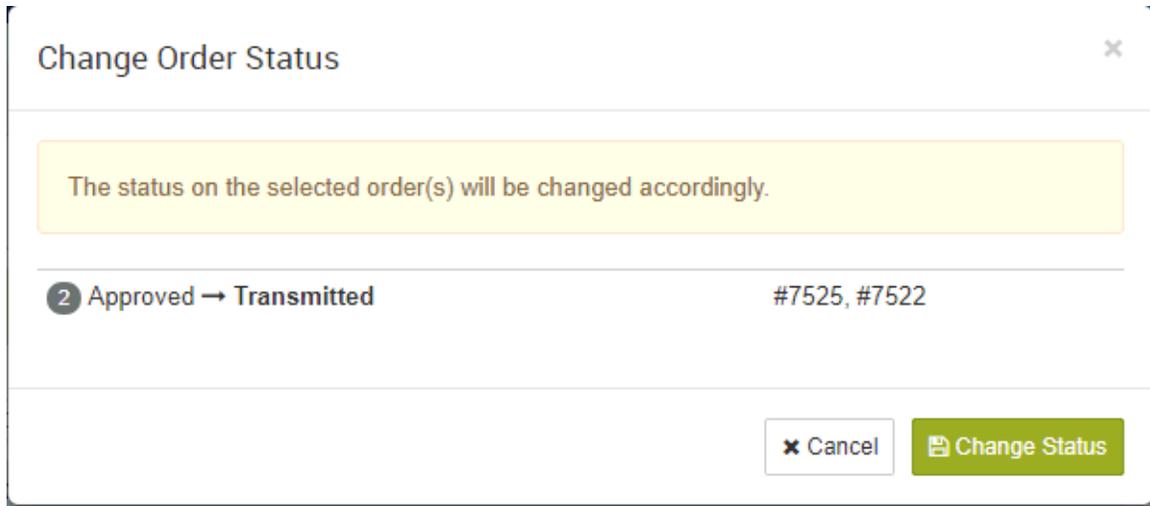
Example

#	Patient	Order Date	Type	Processor	Vendor	Ship To	Status	Status Date	Comments
<input checked="" type="checkbox"/>	7525 Trotter, Marcia	06/18/2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	
<input checked="" type="checkbox"/>	7522 Goede, Janet	06/18/2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	

- Select Change Status from the Actions dropdown menu. *Example*

#	Patient	Order Date	Type	Processor	Vendor	Ship To	Status	Status Date	Comments
<input type="checkbox"/>	7525 Trotter, Marcia	2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	
<input type="checkbox"/>	7522 Goede, Janet	2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	

- In the Change Order Status modal (that automatically displays after step #5), click 'Change Status.' *Example*



7. Selected orders are sent to CooperVision in a batch.

Transmit Single Order

A single order can be transmitted to CooperVision in either of the following ways:

- Access the Order Details screen .
 1. Create and approve an order.
 2. Click 'Transmit Order.'
 3. The order is sent to CooperVision.
- Access the Orders Dashboard.
 1. Click the checkbox beside the order.
 2. In the Actions dropdown menu, select Change Status. *Example*

Actions		Type	Processor	Vendor	Ship To	Status	Status Date	Comments	
Patient Notified		2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	.
Print Order		2018	Contact Lens	SmartFlow	CooperVision	Office	Approved	06/18/2018	
Cancel Order									

3. In the Change Order Status modal (that automatically displays after step #3), click 'Change Status.' *Example*

Change Order Status
✕

The status on the selected order(s) will be changed accordingly.

1
Approved → Transmitted

#7525

✕ Cancel

Change Status

4. The selected order is sent to CooperVision.

Manage Order

Once the order has been transmitted, SmartFlow continuously checks for order status updates from CooperVision. If there is a status change, SmartFlow automatically updates the order status in RevolutionEHR. The workflow surrounding the statuses of Receive, Dispense, and Complete has not changed.

With the integration to CooperVision, there are some new status values possible on your orders.

- **Vendor Received:** Indicates the order was received by CooperVision. The Vendor Order # field is updated by SmartFlow (from CooperVision) and represents the order number within CooperVision. It's their order number in case it is needed for order troubleshooting.
- **Vendor Approved:** Indicates the order was approved by CooperVision.
- **Vendor Rejected:** Indicates the order was rejected by CooperVision. To help manage orders that have been rejected by CooperVision, a task will be sent to the employee that approved the order and the employee that transmitted the order. Any questions related to why the order was rejected should be directed to **RevolutionEHR Customer Support** customersupport@revolutionehr.com **877.738.3471 ext. 2.**
 - The ability to filter by Vendor Rejected status is available in Advanced Search within the Orders Dashboard.
- **Vendor Shipped:** Indicates CooperVision fulfilled the complete order. If CooperVision ships only a partial order (e.g. boxes for one eye only since the other eye was out of stock/back ordered), the RevolutionEHR order status will not be changed to Shipped. It is changed to Shipped only when the entire order has been shipped by CooperVision.

If the order is open when these statuses are updated, close the order and reopen to see the latest changes. All the status changes will be reflected in the Orders Dashboard and both the Order Status History slider and Notes slider. .