



RevConnect

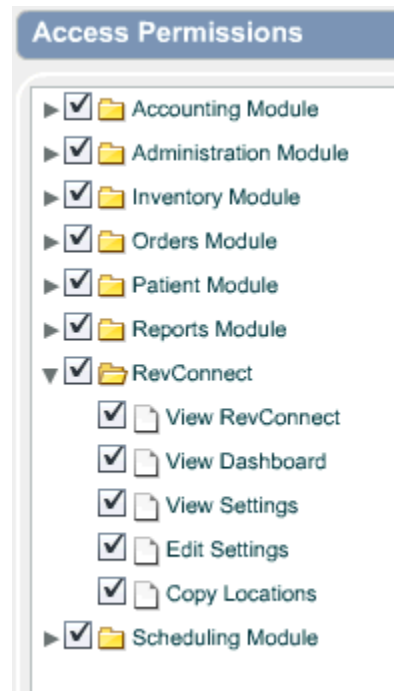
RevConnect	1
Administration	1
Demographics	2
Settings	3
Recommended Settings	3
Communication Categories	4
Communication Times	6
Category Templates	7
Wait List	7
Dashboard	8
Success indicators	8
Results and Search	10
Manual Communication	12

RevConnect

RevConnect is a patient engagement application inside RevolutionEHR that streamlines your patient communication. Built for and enabled directly within RevolutionEHR, RevConnect simplifies the delivery and tracking of your patient reminders, recalls, and custom messages via text and email. RevConnect increases office efficiency and enables patients to connect deeper with the practice, leading to increased revenue and retention.

Administration

Employee access to the RevConnect dashboard is controlled within User Roles in Administration. By default, access permission has only been given to the System Administrator user role. To provide access permission to additional User Roles within your practice, access Admin > Employee/Roles > User Roles > open a user role > click 'Edit' > click the checkbox beside RevConnect > click 'Update.' *Example*



- View RevConnect: Must be selected to give access at any level of RevConnect.
- View Dashboard: Controls access to RevConnect Dashboard.
- View Settings: Allows RevConnect settings to be viewed but not altered.
- Edit Settings: Allows user to edit RevConnect settings.
- Copy Locations: Allows user to copy settings from one location to any other location within a practice.

Demographics

RevConnect references the information from the patient's demographics "Communication Opt-In" to send messages. Although it is likely this data has already been entered for your patients, it can be verified and/or updated by accessing, Patients > search for a patient and open their file > click 'Demographics' > click 'Edit' > Personal Details slider.

- **Phone/Email:** Cell phone number must be entered for text messaging communication. Email must be entered for email communication.
- **Communication Opt-In:** If Communication Opt-In preferences are indicated for the patient, RevConnect refers to the preferences to send communication. If 'No' is selected, this is considered "Opt Out" and RevConnect will not send communication to the patient. **Example**
 - Notice there is a column for cell and a column for text message.
 - General communication refers to Birthday communication.
 - General Communication text messages require General to be set to 'Y' and the associated text message box to be checked. This indicates the patient has agreed to receive marketing text messages (which is currently only birthday greetings).
 - Category relationships to Communication Opt-In Settings:
 - Appt. Conf.: Appointment Reminder and Wait List
 - Recall: Recall and Recare
 - Orders: Order notification
 - General: Birthday message

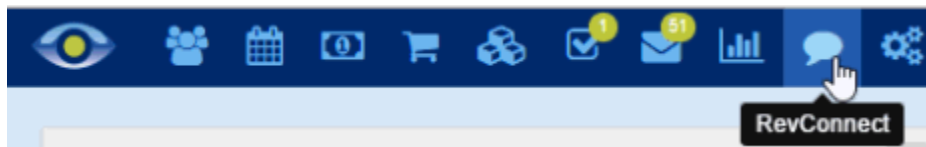
Communication Opt-In						
	Select All	H	W	C	E	A
	Y/N					
Appt. Conf.	<input checked="" type="radio"/> <input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recall	<input checked="" type="radio"/> <input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orders	<input checked="" type="radio"/> <input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General	<input checked="" type="radio"/> <input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opt out		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comment	<input type="text"/>					

- Click 'Update.'

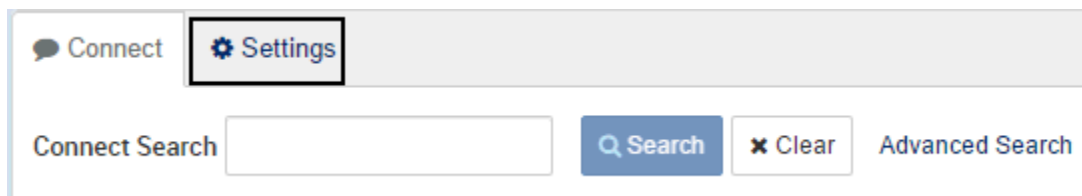
Settings

RevConnect settings are designed to be location specific. Each location determines what type of automated messages should be created and sent, how often, the time frame messages should be sent, and message template options. For most offices, our recommended settings will meet the practice needs and allows a practice to get up and running quickly.

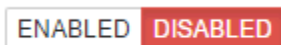
- Click the RevConnect icon within the system's navigation bar to access the RevConnect Dashboard. *Example*



- Click the Settings tab. *Example*



- The location name displayed within the Locations dropdown menu will default to the employee's primary location. If necessary, change the location. Note: Only those locations the employee has access to will appear in the dropdown menu.
- The practice name, address, main phone, and email as entered in Admin > General > Locations > (open location) > Location Details slider, is displayed. Click 'Edit' to navigate to the Location within Administration to update practice information.
- RevConnect is 'ENABLED' and 'DISABLED' by clicking the appropriate button. *Example*



Recommended Settings

RevolutionEHR has configured "Recommended Settings" for Communication Categories and Communication Times. Click 'ON' to use the recommended settings, or, click 'OFF' to customize RevConnect for your practice. *Example*

Notice, 'On' is displayed in dark blue which indicates "Use Our Recommended Settings" has been enabled. The Communication Categories and Communication Time settings cannot be changed until "Use Our Recommended Settings" is changed to "OFF".

Use Our Recommended Settings		ON	OFF
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Communication Categories

Appointment ON OFF

Send a reminder:

Prior to Appointment ✕

Prior to Appointment ✕

[Add a reminder](#)

Recall ON OFF

Send a reminder:

Prior to Recall ✕

Prior to Recall ✕

[Add a reminder](#)

Recare ON OFF

How often would you like to see your comprehensive exams?

Every

Send a reminder:

Prior to Recare ✕

Prior to Recare ✕

[Add a reminder](#)

Order ON OFF

Birthday ON OFF

Communication Categories

Communication Categories are Appointment, Recall, Recare, Order, and Birthday. "Use Our Recommended Settings" must be set to 'OFF' to customize the communication settings for each category.

- **Appointment:** An appointment reminder is automatically sent to patients based on the settings configured within "Send a reminder." Input the parameters for the time frame of the reminder. Click on the link "Add a reminder" to have multiple reminders setup. Click the 'X' to delete a reminder. Click 'OFF' to disable this communication category. *Example*

In this example, an appointment reminder will be sent:

- One week prior to the appointment. AND
- One day prior to the appointment. AND
- Two hours prior to the appointment. AND
- 30 minutes prior to the appointment.

Appointment
ON OFF

Send a reminder:

30 Minutes Prior to Appointment ✕

2 Hours Prior to Appointment ✕

1 Days Prior to Appointment ✕

1 Weeks Prior to Appointment ✕

[Add a reminder](#)

- **Recall:** A recall notice is automatically sent to patients based on the settings configured within "Send a reminder." Input the parameters for the time frame of the recall. Click the link "Add a reminder" to have multiple recalls setup. Click the 'X' to delete a reminder. Click 'OFF' to disable this communication category. *Example*

In this example, a Recall reminder will be sent:

- Two weeks prior to recall. AND
- Three days prior to recall.

Recall

Send a reminder:

3 Days Prior to Recall ✕

2 Weeks Prior to Recall ✕

[Add a reminder](#)

- **Recare:** Recare will help recapture patients who have not had a comprehensive encounter within the specified time period and do not have an active recall or appointment scheduled for a comprehensive encounter. (Note: Comprehensive encounter is defined as any encounter marked

"Is Comprehensive" in Admin > Encounter/Interviews > Encounter Templates. **Example**) Recare notifications are automatically sent to patients based on the settings configured within "Send a reminder." Within the dropdown menu, indicate how often your practice would like to see comprehensive exams. Input the parameters for the time frame of the Recare notice to be sent. Click 'OFF' to disable this communication category. Click 'X' to delete a reminder. **Example**

In this example, the practice would like to see a patient for a comprehensive exam every 12 months. A Recare reminder will be sent:

- One week prior to a recare. AND
- One day prior to a recare.

- **Order:** An order notification is automatically sent to patients when their order is ready. Click 'OFF' to disable this communication category.
 - Eyeglass and Frame order communications are sent when 'Verify Order' has been clicked by the user.
 - Contact Lens and Contact Lens Trials order communications are sent when 'Receive Order' has been clicked by the user.
- **Birthday:** A birthday message is automatically sent to patients on the day of their birthday. Click 'OFF' to disable this communication category.

Communication Times

The default setting for Communication Times is set to "Office Hours." Click the radio button beside "Manually Set Hours" to customize the time that automated communications will be sent.

- **Office Hours:** Automated communications are sent during the office hours that have been setup within Admin > General > Location > Office Hours. Communications will not be sent on days the practice is closed; they will be sent the next business day the practice is open. *Example*

DAY	Open Time	Close Time	Lunch Start	Lunch End	Office Open
MON	08:00 AM	06:00 PM	12:00 PM	01:00 PM	<input checked="" type="checkbox"/>
TUE	08:00 AM	06:00 PM	12:00 PM	01:00 PM	<input checked="" type="checkbox"/>
WED	08:00 AM	06:00 PM	12:00 PM	01:00 PM	<input checked="" type="checkbox"/>
THU	08:00 AM	06:00 PM	12:00 PM	01:00 PM	<input checked="" type="checkbox"/>
FRI	08:00 AM	04:00 PM	11:00 AM	12:00 PM	<input checked="" type="checkbox"/>
SAT	08:00 AM	11:00 AM	11:00 AM	11:00 AM	<input checked="" type="checkbox"/>
SUN					<input type="checkbox"/>

- **Manually Set Hours:** Communications will be sent during the time specified.
 - **Send On Weekends:** Enable the checkbox to have automated communications sent to patients on weekends. If this checkbox is not enabled, communication that would normally be sent on a weekend will be sent the following Monday (e.g. patient's birthday).

Category Templates

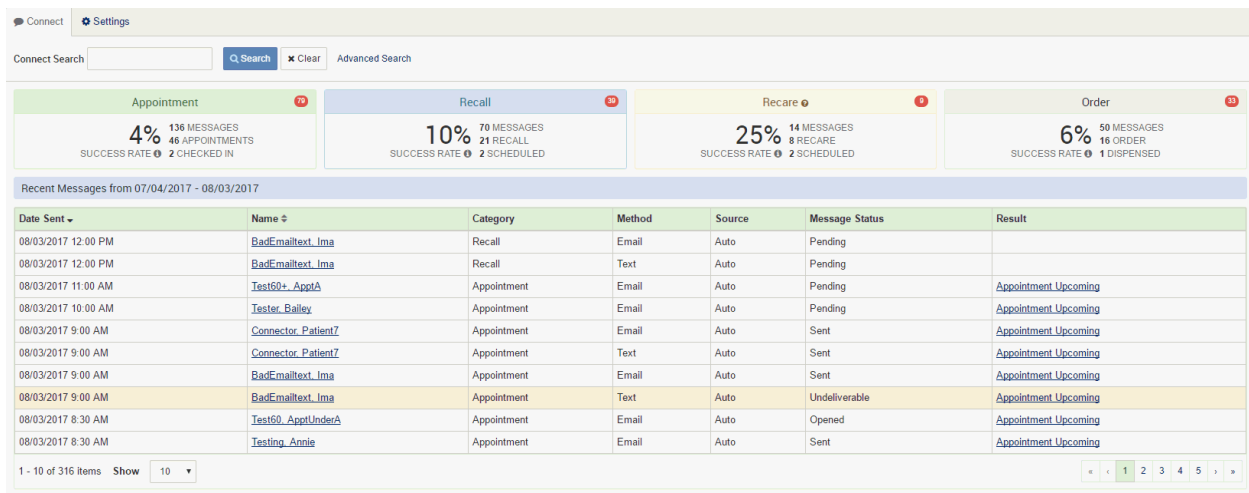
Templates have been created for each type of notification. These templates comply with HIPAA and other federal regulations. We recommend you use these templates whenever possible. Contact Customer Support if you need assistance changing any of these templates.

Wait List

Wait List communications to the patient are a manual process. Notice, Wait List Notification templates have been created within Available Templates.

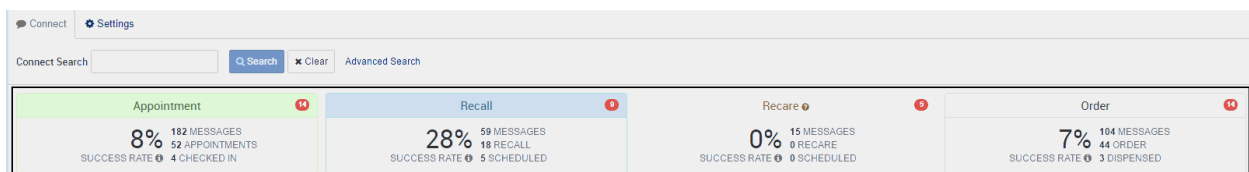
Dashboard

The RevConnect Dashboard allows you to search for communications, displays the success rate of communications sent, and provides quick links to the patients and their communication results. As the Dashboard is accessed, success rates and patient communications are automatically displayed from the last 30 days. **Example**

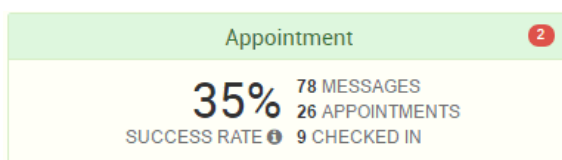


Success indicators

Success indicators are displayed for Appointment, Recall, Recare, and Order messages. These indicators provide a way to measure if communications are resulting in positive outcomes. **Example** The kind of information displayed in each success indicator is similar, however, it does change slightly depending on the indicator's category.



- To review the information displayed within a success indicator, we have used the following **Example**.

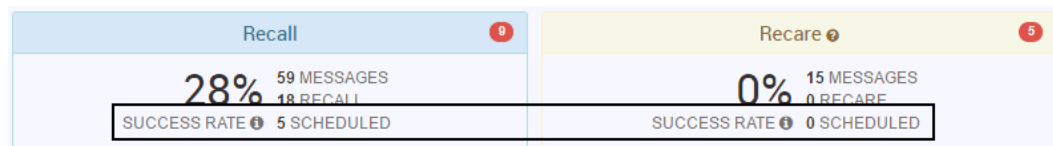


- The communication category is Appointment.

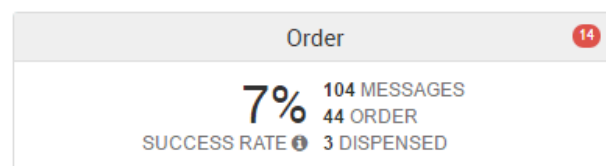
- The red icon indicates there was a message(s) sent that was either undeliverable or the patient opted out. The total number of messages with the status of undeliverable or opted out is displayed within the icon. Note: Undeliverable and opted out statuses are highlighted in red within the grid at the bottom of the screen. **Example**

Date Sent ▾	Name ☺	Category	Method	Source	Message Status	Result
08/03/2017 9:00 AM	BadEmailText_Ima	Appointment	Text	Auto	Undeliverable	Appointment Upcoming
08/03/2017 8:00 AM	Test_BadEmailText	Birthday	Text	Auto	Undeliverable	
08/03/2017 8:00 AM	BadEmailText_Ima	Birthday	Text	Auto	Undeliverable	

- **Success Rate:** The percentage displayed indicates the success rate for that category's communications. Hover your mouse over the 'i' icon ⓘ to view the formula used to determine the success rate percentage. The formula used is the number of patients checked in / divided by the number of appointments.
- **Messages:** The total number of messages sent within the date range indicated for the current search. This number includes the total number of email and text messages (e.g. A patient is sent a text and an email for one appointment, this will count as two messages.).
- **Appointments:** This number indicates the total number of individual appointments for which communications that have been created. Because it is likely communications will be sent by both email and text, this number will be significantly lower than the messages number.
- **Checked In:** "Checked In" is displayed for the Appointment category only. The number displayed indicates how many patients had an encounter started.
- **Scheduled:** This is displayed for Recall and Recare categories only. The number displayed indicates if an appointment was scheduled. **Example**



- **Dispensed:** This is displayed for the Order category only. The number displayed indicates how many orders have been dispensed. **Example**



Results and Search

Results

- Each time the Dashboard is accessed, there is an automatic search completed that is for the prior 30 days. All messages that have been created are listed in the grid at the bottom of the page.

Example

The screenshot shows a dashboard with four summary cards at the top: Appointment (4% success rate, 136 messages), Recall (10% success rate, 70 messages), Recare (25% success rate, 14 messages), and Order (6% success rate, 50 messages). Below these is a table titled 'Recent Messages from 07/04/2017 - 08/03/2017' with columns: Date Sent, Name, Category, Method, Source, Message Status, and Result. The table contains 10 rows of data. At the bottom, there is a pagination bar showing '1 - 10 of 316 Items' and a 'Show' dropdown set to '10'.

Date Sent	Name	Category	Method	Source	Message Status	Result
08/03/2017 12:00 PM	BadEmailtext_Ima	Recall	Email	Auto	Pending	
08/03/2017 12:00 PM	BadEmailtext_Ima	Recall	Text	Auto	Pending	
08/03/2017 11:00 AM	Test60+ AppptA	Appointment	Email	Auto	Pending	Appointment Upcoming
08/03/2017 10:00 AM	Tester_Railley	Appointment	Email	Auto	Pending	Appointment Upcoming
08/03/2017 9:00 AM	Connector_Patient7	Appointment	Email	Auto	Sent	Appointment Upcoming
08/03/2017 9:00 AM	Connector_Patient7	Appointment	Text	Auto	Sent	Appointment Upcoming
08/03/2017 9:00 AM	BadEmailtext_Ima	Appointment	Email	Auto	Sent	Appointment Upcoming
08/03/2017 9:00 AM	BadEmailtext_Ima	Appointment	Text	Auto	Undeliverable	Appointment Upcoming
08/03/2017 8:30 AM	Test60_ApptUnderA	Appointment	Email	Auto	Opened	Appointment Upcoming
08/03/2017 8:30 AM	Testing_Annie	Appointment	Email	Auto	Sent	Appointment Upcoming

- Date Sent: Date and time the communication has been or will be sent.
- Name: The patient name is a hyperlink to the patient's chart.
- Category: Indicates the communication category. (Appointment, Recall, Recare, Order, Birthday, Wait List.)
- Method: Indicates how the communication was sent or is going to be sent. (Email or Text.)
- Source: Indicates if the communication was sent automatically according to the RevConnect settings or if the communication was sent manually.
- Message Status: Indicates the message status. (Pending, Sent, Opened, Undeliverable, Opted Out.)
 - Pending indicates the communication has been created within RevolutionEHR but is waiting to be sent according to the "Communication Times" that have been indicated within "Settings."
- Result: Indicates the result of the communication. The data displayed will vary based on the Category and some results will include a hyperlink.

Search

- Simple Search:** Input a patient's last name or first name (or partial name information) and click 'Search.'

- **Advanced Search:** Use the dropdown menu options to create search parameters that will meet your needs. Click 'Clear' to reset the search fields. Click 'Simple Search' to close "Advanced Search." *Example*

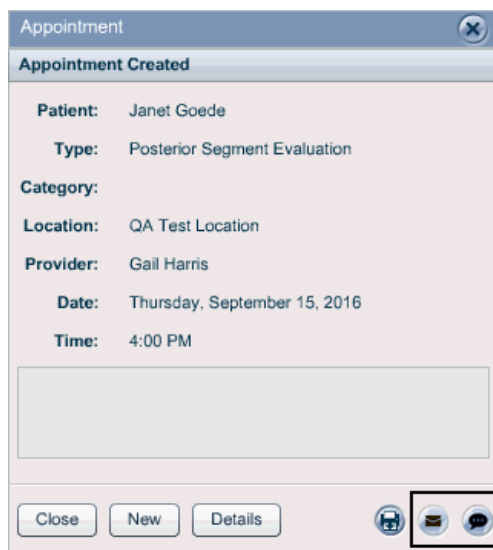
The screenshot displays the 'Advanced Search' interface. At the top left, there are tabs for 'Connect' and 'Settings'. The main area contains several search filters: 'Location' is set to 'Raymore Optometry Services'; 'Date Sent' is a date range from '07/05/2017' to '08/04/2017'; 'Patient' has a search bar with the text 'Search Patients...'; 'Category' is set to 'All Categories'; 'Result' is set to 'All Results'; 'Method' is set to 'All Methods'; 'Message Status' is set to 'All Message Statuses'; and 'Source' is set to 'All Sources'. At the bottom left, there are buttons for 'Q Search' and 'Clear', and a link for 'Simple Search'.

Manual Communication

RevConnect will automatically send messages according to the [Settings](#). As an added feature, messages can be manually sent from select screens throughout the system. If email and/or cell phone information has been entered in the patient's Demographics, these select screens will include a button or icon that can be clicked by the user and communication is sent immediately. Templates for Manual communication are within the Settings screen under Category Templates.

Appointment Created

- When an appointment is created, if email and/or cell information has been entered for the patient, an icon for email and/or text will display on the Appointment Created window. *Example*



Appointment Details

- If email and/or cell information has been entered for the patient, a button for email and/or text will display on the Appointment Details window. *Example*

Appointment

Appointment Details

Patient	Goede, Janet* (361200)
Age	76 Years
Type	Posterior Segment Evaluation
Category	
Date	Thursday, Sep 15, 2016
Start time	4:00PM
Provider	Gail Harris
Status	Active
Confirmation	Unconfirmed
Workflow step	
Encounter	
End time	4:15PM / 4:15PM
Created on	09/15/2016
PHR	Not created by patient

Edit

Patient Insurance

Appointment History

Appointment Notes

Confirm
Reschedule
Cancel
NoShow

Print
Email
Text
Open
Start

Orders

- If email and/or cell information has been entered for the patient, a button for email and/or text will display on the order. **Example**

Patients
Racine, S

Racine, Sandy Age: 49 Years #331456

Export To Optos
Export To Optovue
Export To Zeiss Forum
Message
Add Task
Record Summary
Communicate
Book Appl.

Orders - Optical

Order History
Order #2786

Order Details

CL Order Details (Change Order)

Order # 2786

Order Date 04/25/2016

Due Date

Completion Date

Order Location Raymore Optom...

Encounter #

Status New (04/25/2016)

Original Order # 2053

Comment

Supplier/Distributor

Processor Manual

Name

Account #

Address

Main Phone

Toll Free Phone

Fax

Vendor Order #

Shipping Information

Ship To Patient Practice Other

Address 752 SW 2nd St

City Raymore

State Missouri

Zip code 64083

Shipping Co. None

Tracking #

Quantity/Packaging

OD 0

OS 0

Color/Tint

OD -Select-

OS -Select-

OS=OD

Patient Information

Name Racine, Sandy

Phone (000) 555-9999

Notified

Comments

Instructions

Tray

Rx Information

Billing

Order Status History

Order Costs

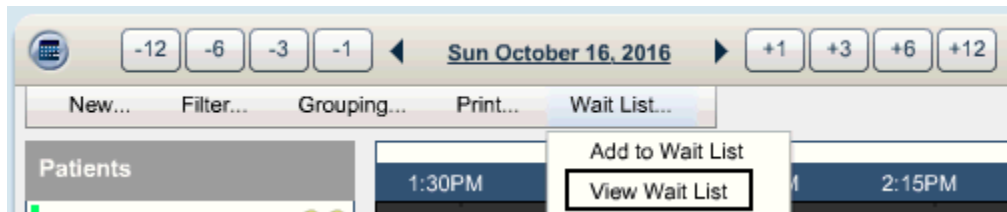
Notes

Duplicate Order
Cancel Order
Change Order
Remake Order
Complete Order
Print Order
Email Patient
Text Patient

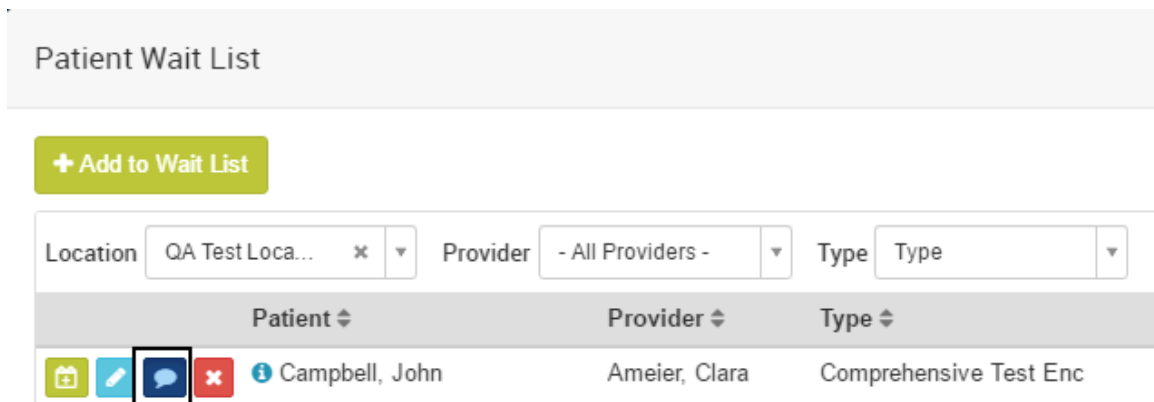
Edit
Approve Order

Wait List

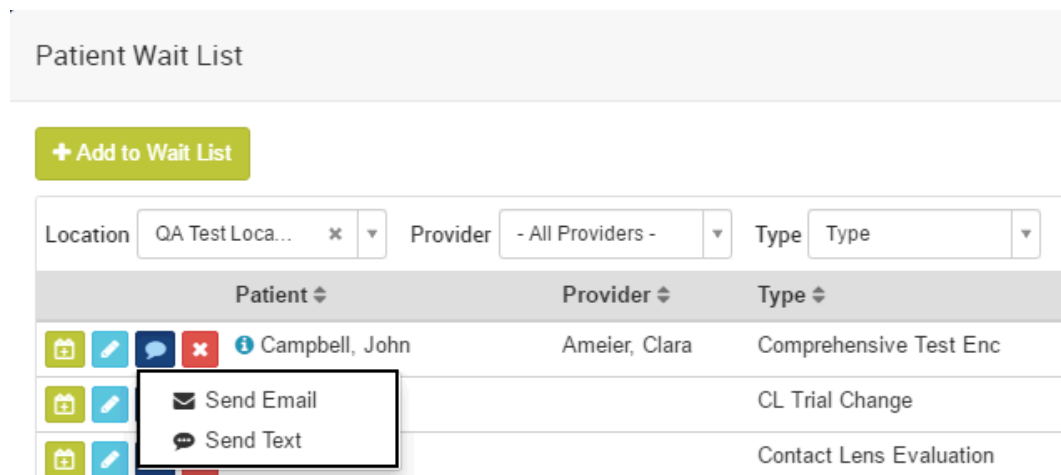
- Manual communication to the patient is available by accessing the Wait List. *Example*



- If email and/or cell information is entered for the patient, a RevConnect icon is displayed by the patient name. *Example*



- Click the RevConnect icon to display communication options. *Example*



- Select the communication type and a message is immediately sent.
- Note: Wait List has unique error messages when a message cannot be sent. Error messages appear in the upper right corner of your screen as a red alert. *Example*

