RevolutionEHR

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RevolutionEHR Patient Statements

10/03/2011

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1. RevolutionEHR/Gateway Pt Statement Integration

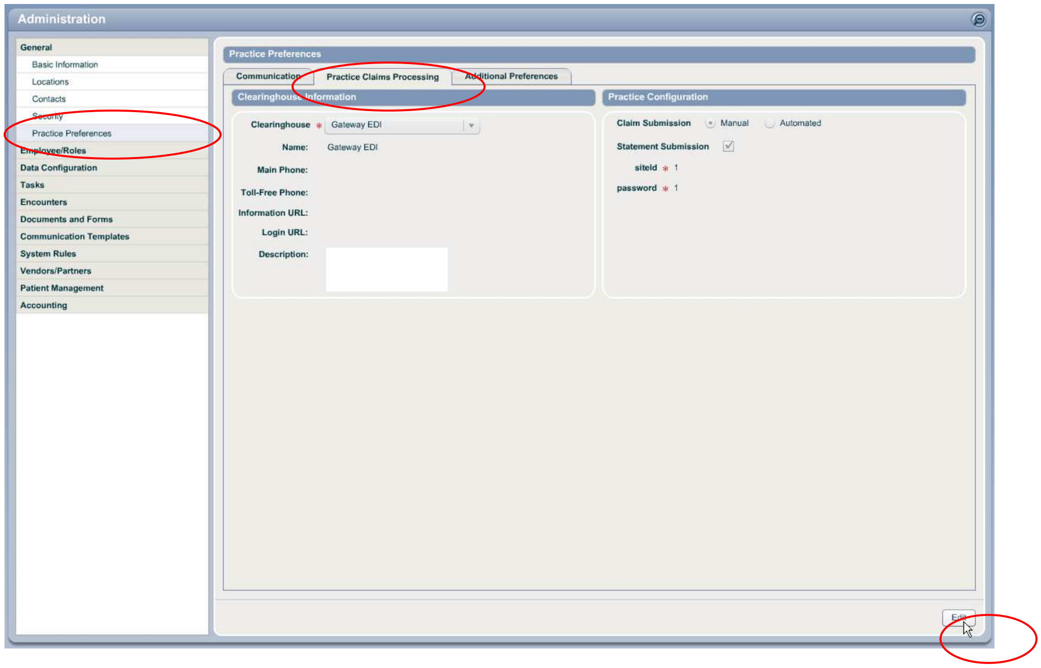
1.1 Getting Started

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.

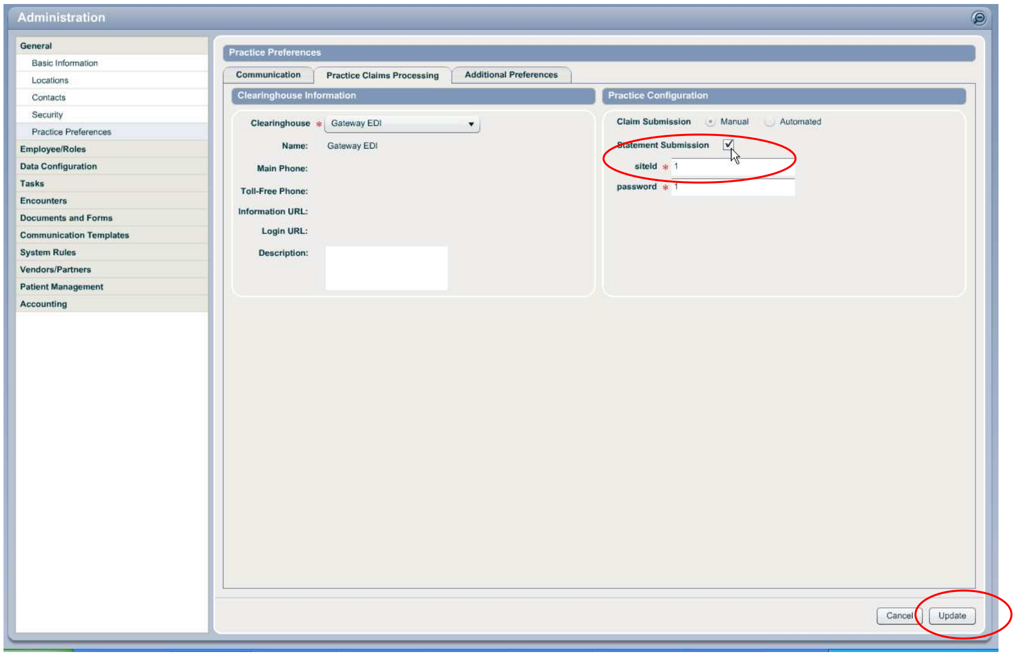
During the statement configuration process, you will be asked to send a Patient Statements Test File. When Gateway is ready for your test file you may turn on the integration.

1.2 Turning on the Pt Statement Integration for your practice

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

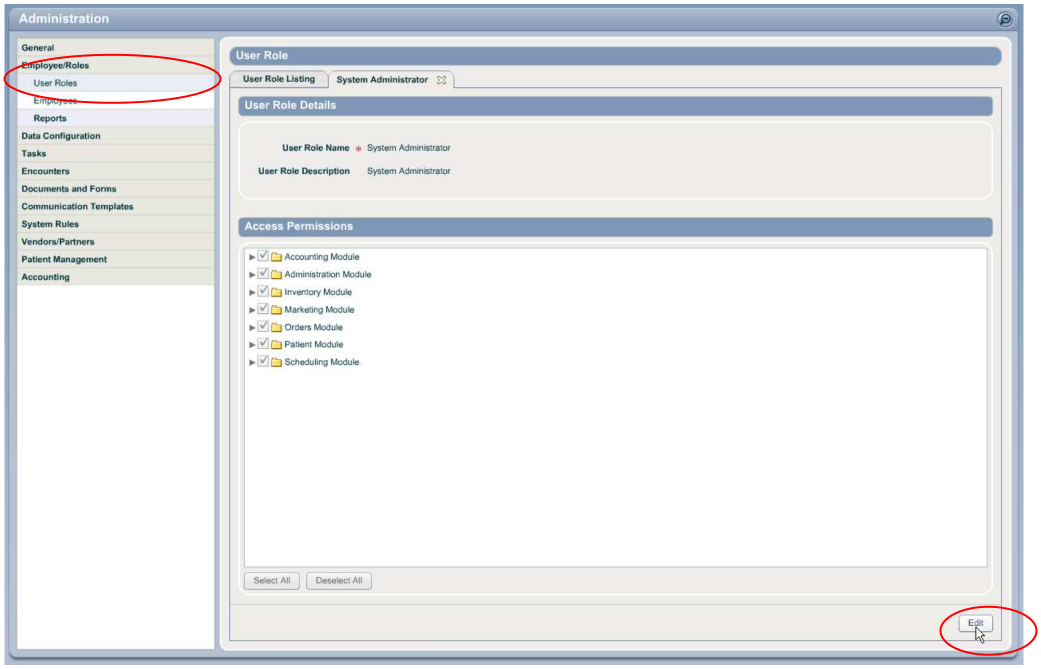


- Check the box for "Patient Statements"
- Click "Update"

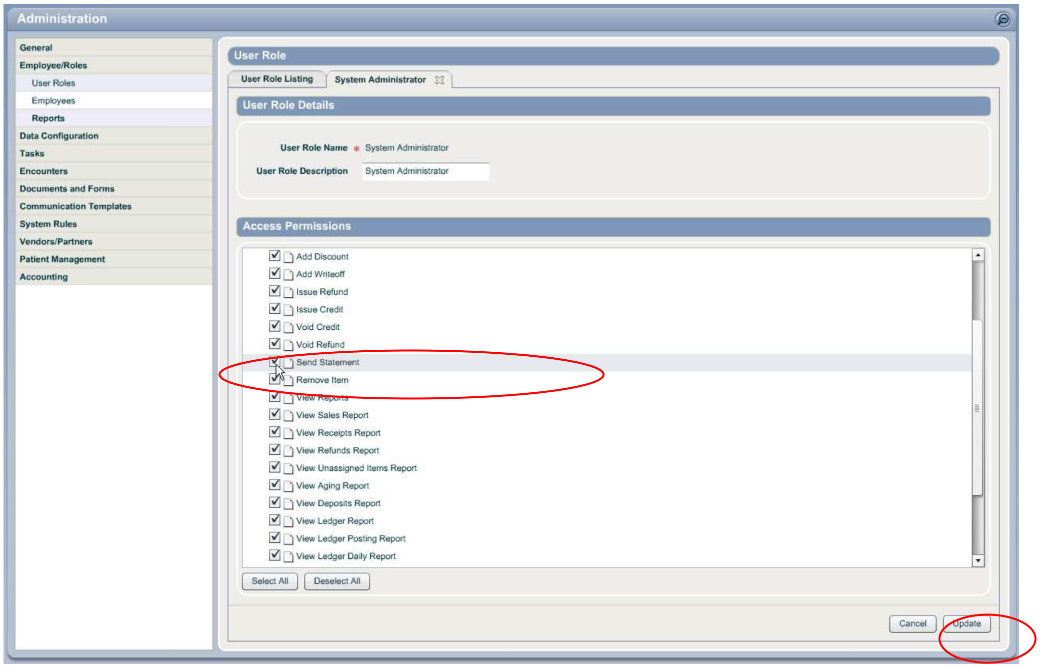


This will enable the Patient Statement integration for your practice. However, you must give permission to send statement to specific user roles to allow users the ability to use this integration.

- 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"



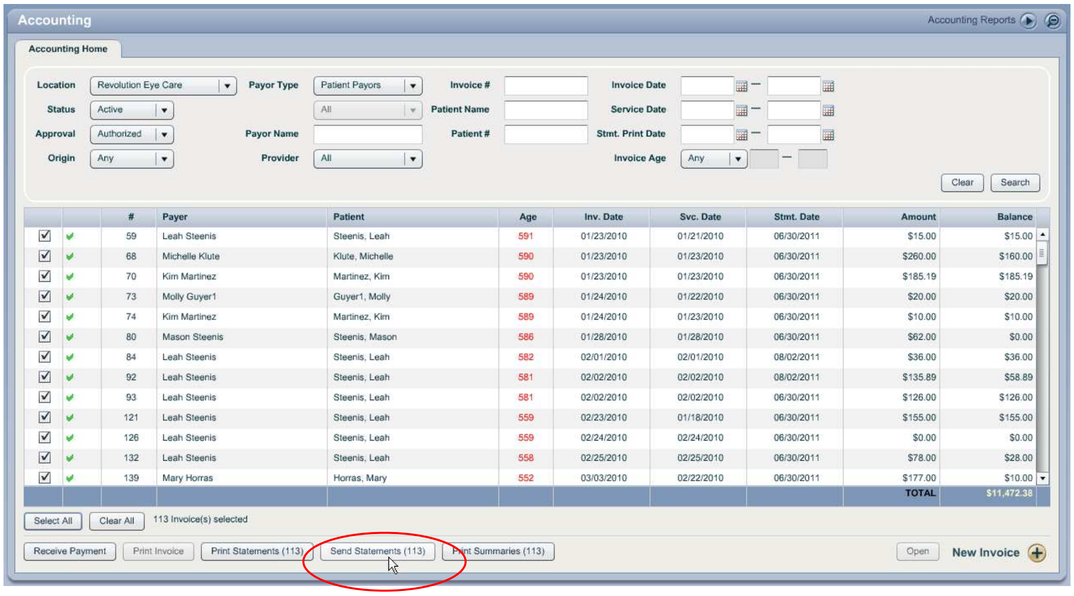
***IMPORTANT NOTE**: Do not turn on your Patient Statement integration until Gateway is ready for a test file*

1.3 Sending Pt 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:

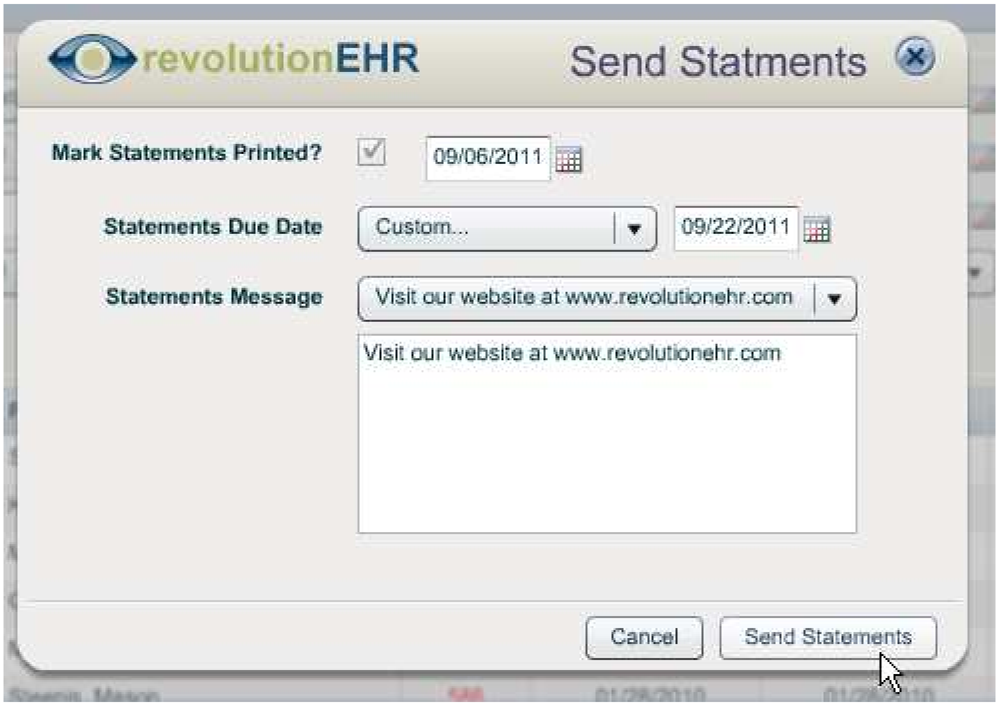
From the Accounting Module configure a list of patient invoices using the Accounting search options. Remember that only "Authorized" patient invoices can be included in a patient statement. Once that list has been generated, check the boxes to the left of the invoices you wish to have included in the 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):



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:



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