Self-guided Training

Start Up Manual
# Table of Contents

1. Overview........................................................................................................................................... 4

2. Data Transfer...................................................................................................................................... 4
   2.1 Data Transfer Procedures.............................................................................................................. 4
   2.2 Data Transfer Mapping Requirements.......................................................................................... 5

3. Resources ............................................................................................................................................ 5
   3.1 Live Courses................................................................................................................................. 5
   3.2 Recorded Webinars and Written Manuals.................................................................................... 5
   3.3 Video Library............................................................................................................................... 5
   3.4 Contact Support ........................................................................................................................... 5

4. Recommendations for Success .......................................................................................................... 6
   4.1 In Office Project Manager............................................................................................................ 6
   4.2 Practice Time in the Sandbox ..................................................................................................... 6
   4.3 Reset your default password ....................................................................................................... 6

5. Enhanced Functionality Options ...................................................................................................... 7
   5.1 Physical Inventory....................................................................................................................... 7
   5.2 Inventory Reports........................................................................................................................ 7
   5.3 Fee Schedules............................................................................................................................. 7
   5.4 Appointment Slots...................................................................................................................... 8
   5.5 Letters (Communication Templates).......................................................................................... 8
   5.6 Patient Portal............................................................................................................................... 8
   5.7 Query Builder.............................................................................................................................. 8
   5.8 Gateway EDI Patient Statement Integration.............................................................................. 9

6. Recommended Supplemental Viewing .............................................................................................. 9
   6.1 Electronic Claims 101 ................................................................................................................ 9
6.2 End of Day Checklists ................................................................. 9
6.3 Line Item Payments and Saved Payments ....................................... 9
6.4 Recall .............................................................................................. 9
7. Partner Integrations ............................................................................. 10
  7.1 GatewayEDI ................................................................................ 10
  7.2 RxNT ............................................................................................ 10
  7.3 VisionWeb ..................................................................................... 11
  7.4 VSP/Eyefinity ............................................................................... 11
  7.5 Device Integration ......................................................................... 11
  7.6 Patient Communication Partners .................................................. 12
8. Meaningful Use .................................................................................. 12
  8.1 Quest to Attest ............................................................................... 12
9. Appendix A ......................................................................................... 13
1. Overview

Self-guided training is a program that is designed to allow the customer to train at their own pace. Unlike trainer-guided, this program requires more attention and discipline on the customer side. The offices using self-guided training will learn the app using a combination of resources to prepare the doctors and staff for the implementation of RevolutionEHR into their practice.

While self-guided training does allow an office to move forward at a faster pace if desired, it should not be viewed as an option that allows the office to skip or go around certain areas for faster implementation. We strongly recommend that attention to detail, and close monitoring be taken seriously by the person or persons in the practice that are heading up this implementation process.

The project manager of the implementation process in the office must communicate the importance of the completion of each course as not only the viewing of a webinar, but as a true learning experience that also requires practice and attention. Be sure everyone in the office buys into this philosophy.

Successful implementation of any EHR system directly ties into the effort, time, and commitment given by each member of your team. This is especially true when the office has taken on the task of self-guided training.

2. Data Transfer

2.1 Data Transfer Procedures

If you require a data transfer, one of the first things you need to accomplish is scheduling the transfer. The transfer requires interaction between you and an assigned member of our development team. The developer will also need time designated to appropriately export, review, map, and import your data. This process can take the developer two days or more to complete.

Our current schedule for data transfers is booked out for several weeks. Data transfers are typically completed a few days prior to the actual "go live" date when you will begin using RevolutionEHR in your practice. It would be very beneficial for your implementation of RevolutionEHR if you return this document with your anticipated go live date and requested data transfer date as soon as possible: http://insight.revolutionehr.com/wp-content/uploads/Data-Transfer-Schedule-Document-Master.pdf. This will help to ensure that your go live date is not delayed due to scheduling of the data transfer.
The developer assigned to your data transfer will provide you with the details related to what type of data can be imported, as this can vary from system to system. There are documents available on Insight that will give you a basic overview of the data transfer information for specific programs. To view those documents, click here: http://insight.revolutionehr.com/?p=5127

2.2 Data Transfer Mapping Requirements
It is important that the set-up of key areas in your live site are completed prior to your data transfer. This will include all locations, all providers, all insurance companies and encounter templates. The set-up of these areas will be covered during your live webinar courses.

3. Resources

3.1 Live Courses
Live courses are webinars hosted by RevolutionEHR trainers and are provided on varying days and at varying times. Each webinar will conclude with a question and answer session. There is no limit to how many times self-guided offices may attend webinars. A list of the webinars and their description is available as an appendix to this document, but can also be viewed here: http://insight.revolutionehr.com/?cat=59

3.2 Recorded Webinars and Written Manuals
Access to recorded webinars and written manuals will be provided. These guides will assist the self-guided office in the implementation of the enhanced functionality options also available in RevolutionEHR. This includes, but is not limited to, partner integrations, enhanced billing options, enhanced scheduling options, etc.

3.3 Video Library
A video library is available in addition to the live webinars. Many of the videos cover the same topics discussed during the live webinars. We are continuously adding videos to this library. To view the videos that are currently available, click here: http://insight.revolutionehr.com/?cat=44

3.4 Contact Support
Direct contact to RevolutionEHR support specialists will be provided via email and phone. Dedicated staff will reply to all questions, concerns, and comments from self-guided offices that are submitted via email to self-guided-support@revolutionehr.com, or by calling 877-738-3471 and selecting ext 4 for Self-Guided Support.

These contact resources are meant to address specific questions, concerns, or comments and are not intended to be used for one on one training sessions. If you...
believe that your staff requires a more one to one experience you may want to consider switching over to the trainer-guided option for implementation. If the call or email into self-guided support becomes too involved, the support specialist will make the recommendation that the employee attend additional webinars related to the topic of the support call or email.

4. Recommendations for Success

4.1 In Office Project Manager
It is strongly recommended that each practice appoint a project manager to oversee the implementation of RevolutionEHR. The project manager will be responsible for:

- Return data transfer request form
- Assignment of courses to staff and doctors
- Registration for these webinars (see Section 2.1 to find the link)
- Setting and controlling target dates and timelines

4.2 Practice Time in the Sandbox
Set aside time to practice what was learned during the taking of a course or viewing of a recorded webinar. While the courses and recorded webinars provide detailed “how to” instructions, nothing can replace hands on learning. If the commitment is made to schedule practice time within a day or two of webinar attendance, the user will come away with a more comprehensive understanding and will be better prepared on the Go Live day.

4.3 Reset your default password
A default password is given when an account is first set up on production. To keep your environment secure we recommend that you reset this password soon after being given access. To reset your password:

- Go to Administration/Employee, Roles/Employees
- Open your employee file
- Edit in the bottom right
- Click on the “Log in details” slider in the bottom left
- Click “Reset Password”
- Update in the bottom right
- Highlight and copy the temporary password
- For backup, write down the temporary password displayed in the log in details slider. Remember that passwords are case sensitive.
- Log out
- Log in with your temporary password, you will be prompted after hitting “Log in” to reset your password. This will give you the option to create your own password. By default the requirements on passwords are 6 or more characters.
characters. An option to add more restrictions on passwords will be reviewed in the Administration Set Up webinar.

5. Enhanced Functionality Options

5.1 Physical Inventory
The creation of physical inventory items is covered as part of the live Product and Services Catalog Set Up course, but additional information is available as not all offices may choose to implement the creation and tracking of physical inventory at start up. Two recorded webinars are available on the topic of configuring your physical inventory:

- To watch the recorded webinar on configuring physical inventory items view: http://insight.revolutionehr.com/?p=1377.
- To watch the recorded webinar for adjusting quantities for physical inventory items view: http://insight.revolutionehr.com/?p=1377.

5.2 Inventory Reports
If an office chooses to implement the physical inventory tracking feature in RevolutionEHR, reports are available for viewing physical inventory numbers/information.


5.3 Fee Schedules
The feature referred to as Fee Schedules allows the user the ability to enter maximum allowable fees as dictated by insurance. This is most commonly used for Medicare, but can be configured for any fee schedule applicable to the office.

The biggest advantage of a pre-configured fee schedule is the ability to automatically apply the appropriate write off amount at the initial invoice creation, instead of waiting until posting of the insurance payment. This reduces the accounts receivable balance sooner and also provides the user the ability to verify that the amount being paid by insurance matches the contracted allowance for that service. Fee schedules was added to RevolutionEHR in 2 phases.

- To watch the corresponding webinar for both creating and applying fee schedules view: http://insight.revolutionehr.com/?p=1368
5.4 Appointment Slots
An overview of appointment slots was presented during the live Scheduling course. An appointment slot is a visual indicator within the schedule where an appointment can be booked based on provider, appointment type, and start time. In addition to being a visual indicator, slots can be “searched”, creating a list of appointment openings based on provider, type and start time.

- To watch the recorded webinar on configuring and using appointment slots view: [http://insight.revolutionehr.com/?p=1390](http://insight.revolutionehr.com/?p=1390)

5.5 Letters (Communication Templates)
RevolutionEHR provides all new users with several pre-configured encounter letter and patient letter templates that are set up with data merge fields that pull specific patient and/or encounter data into a letter to be sent to patients or providers. The supplied templates can be edited, or new templates can be created by each office.

- To watch the corresponding webinar view: [http://insight.revolutionehr.com/?p=1331](http://insight.revolutionehr.com/?p=1331)

5.6 Patient Portal
Patient Portal is a rapidly expanding feature provided by RevolutionEHR. The initial development included the ability to configure and provide portal log in information to your patients. The first phase of portal gives patients a read only view of their demographics, insurance, account balance, order status, encounter history and appointment history. The next phase will include a patient interview that will allow the patient the ability to complete an exam history questionnaire online that will generate data that can be imported directly to the patient’s encounter.

- To read all information and advisory documents related to set up and use of the patient portal view: [http://insight.revolutionehr.com/?cat=74](http://insight.revolutionehr.com/?cat=74)

5.7 Query Builder
The option to build custom searches and rules is available in different areas in RevolutionEHR.

- **Invoice Search**: The Invoice and Invoice Item Search options are found in the Accounting Module and can be used to create custom reports that generate
lists of invoices or invoice items. To access the instructions supplied when Invoice search was added view:  

- **System Rules**: A query builder option located in the Administration Module allows for the ability to build system rules to trigger alerts within an encounter for Clinical Decision Support rules and Patient Education rules. These rules are a Meaningful Use requirement, and the manual for rule building can be found in the Meaningful Use FAQ link in the Help Menu of the app or by viewing:  

### 5.8 Gateway EDI Patient Statement Integration

Tracy Steenis and Gateway EDI staff team up to present an overview on how to take advantage of the new Patient Statement sending integration from RevolutionEHR to Gateway EDI. To access the recorded webinar, click here:  
http://insight.revolutionehr.com/?p=1373

### 6. Recommended Supplemental Viewing

#### 6.1 Electronic Claims 101

This webinar provides a detailed look into the data contained in a 5010. Use this knowledge to better interpret claim rejections, to minimize re-file time, and ultimately to reduce your quantity of rejections. To access the recorded webinar, click here:  
http://insight.revolutionehr.com/?p=6269

#### 6.2 End of Day Checklists

This webinar provides an overview of best practices for reviewing the end of your day via RevolutionEHR - review the unassigned items reports, complete pending payments, running deposit reports, checking next day appointments, reviewing unsigned encounters, placing orders, and more. To access the recorded webinar, click here:  
http://insight.revolutionehr.com/?p=6228

#### 6.3 Line Item Payments and Saved Payments

This webinar provides an overview on how to “turn on” and use line item posting as well as the ability to save payments and complete them at a later time. To access the recorded webinar, click here:  
http://insight.revolutionehr.com/?p=4720

#### 6.4 Recall

This webinar provides an overview on the various means to implement Recall in RevolutionEHR – including built in Recall reports, manual entry of recall vs. utilizing Care Plan Items to autopopulate recall, manual recall based using last exam information, and leveraging communication partners. To access the recorded webinar, click here:  
http://insight.revolutionehr.com/?p=5876
7. Partner Integrations

7.1 GatewayEDI
GatewayEDI is a national clearinghouse that is directly integrated to RevolutionEHR for electronic claim submission. Another Gateway integration option allows the user the ability to design custom patient statements through Gateway. **Getting started:** The initial contact with GatewayEDI must be initiated by RevolutionEHR to ensure that the account is set up at Gateway appropriately. If you would like to be contacted by a Gateway sales rep please send your request to self-guided-support@revolutionehr.com and you will be contact by Gateway within a few days. Please include the name, email and phone number of the person at your office that will be Gateway’s main contact. The set up process can take several weeks so it is best to start this process as soon as possible.

- **After contracting with Gateway:** Once you have started the paperwork process with Gateway you can view the first of 2 Gateway integration videos. The first video contains all needed information on setting up RevolutionEHR in preparation to use GatewayEDI. A link to this video will be provided upon request.

- **Gateway test file:** You will be contacted by Gateway when all appropriate insurance approvals are in or close to being completed. At that time Gateway will request that a “Test file” be sent. At this time you will view the second Gateway video that contains the instructions needed for sending a test file to Gateway view. A link to this video will be provided upon request. Once the integration for electronic claims has been set up and tested the user can choose to add the Patient Statements option. Patient statement information can be sent electronically from RevolutionEHR to GatewayEDI. Gateway will then print and mail the custom statements to patients. Users may choose to implement only the electronic claims submission feature, or may sign up for both claims and statements, but cannot choose to use the statement integration alone. To read the instructions for setting up and using the Patient Statement integration view: [http://insight.revolutionehr.com/wp-content/uploads/ReleaseNotes_5_3_2_a.pdf](http://insight.revolutionehr.com/wp-content/uploads/ReleaseNotes_5_3_2_a.pdf). To watch the corresponding webinar view: [http://insight.revolutionehr.com/?p=1373](http://insight.revolutionehr.com/?p=1373)

7.2 RxNT
This integration provides e-prescribing capabilities directly from RevolutionEHR to RxNT, a CCHIT certified e-prescribing software. Similar to Gateway, the initial request to use this integration should be sent to self-guided-support@revolutionehr.com. RevolutionEHR will provide you with the appropriate
contact information at RxNT as well as all of the paperwork needed to contract with RxNT.

- For an overview of our integration with RxNT, view this webinar: [http://insight.revolutionehr.com/?p=1387](http://insight.revolutionehr.com/?p=1387)

### 7.3 VisionWeb
An integration exists directly from RevolutionEHR to VisionWeb for the purpose of order submission to VisionWeb associated spectacle labs and contact lens suppliers.


### 7.4 VSP/Eyefinity
The VSP/Eyefinity integration allows for the ability to check VSP eligibility and obtain the VSP authorizations directly from RevolutionEHR. In addition, claims and orders can also be submitted directly through RevolutionEHR.


### 7.5 Device Integration
Device integration with Marco instruments is available in RevolutionEHR. This integration provides the ability for data from the Marco instruments to be auto-populated into the appropriate tests within a patient’s encounter.


The following links can be used to access the existing integrations RevolutionEHR currently has:

- Topcon  http://insight.revolutionehr.com/?p=6684
- Huvitz  http://insight.revolutionehr.com/?p=7211
- Reichert  http://insight.revolutionehr.com/?p=8208

7.6 Patient Communication Partners

RevolutionEHR currently has integration available with 4 companies that enhanced provide patient communication services. RevolutionEHR users interested in signing up for these services should contact the partner directly:

- **Websystem3**: A recorded webinar is available to provide detailed information regarding the services offered by Websystem3. This was a joint webinar hosted by RevolutionEHR with participation by Websystem3. To watch this webinar for more information view:  http://insight.revolutionehr.com/?p=4613  For Websystem3 contact information go to:  http://www.websystem3.com/Website_Support_Pages/Contact_Us.asp

- **SolutionReach** (Formerly SmileReminder): A recorded webinar is available to provide detailed information regarding the services offered by SolutionReach. This was a joint webinar hosted by RevolutionEHR with participation by SolutionReach. To watch this webinar for more information view:  http://insight.revolutionehr.com/?p=4611  For SolutionReach contact information go to:  http://www.solutionreach.com/vision/contact_us

- **4PatientCare**: A recorded webinar is available to provide detailed information regarding the services offered by 4PatientCare. This was a joint webinar hosted by RevolutionEHR with participation by 4PatientCare. To watch this webinar for more information view:  http://insight.revolutionehr.com/?p=4608  For 4PatientCare contact information go to:  http://www.4patientcare.com/contact_us.aspx

- **DemandForce**: A recorded webinar is available to provide detailed information regarding the services offered by DemandForce. To watch this webinar for more information view:  http://insight.revolutionehr.com/?p=3863  For DemandForce contact information go to:  http://www.demandforce.com/about-demandforce/contact/

8. Meaningful Use

8.1 Quest to Attest

RevolutionEHR has been certified as a Complete EHR by CCHIT, in compliance with the certification criteria adopted by Health and Human Services. This allows eligible
providers using RevolutionEHR to participate in the EHR incentive program that is part of the ARRA recovery act.

Meeting Meaningful Use requires doctors to understand the specific requirements and attest to meeting these requirements over a period of time. Quest to Attest is a unique program designed by RevolutionEHR to assist you in achieving Meaningful Use with RevolutionEHR.

Quest to Attest aims to bring RevolutionEHR users together in a cooperative effort and includes educational papers, videos and webinars, as well as overviews of the 25 Meaningful use requirements. We also have an online community on Facebook for answering questions, concerns and sharing ideas with peers.

- To view all information related to the Quest to Attest program view: http://insight.revolutionehr.com/?cat=30

9. Appendix A

Office Focused Administrative Set Up:

Topic: This course covers the areas of the Administration Module needed to configure your office including locations, employees, vendors, partners and other data configuration set up.

- Prerequisites: None
- Recommended for: Office Administrators
- Approximate Duration: 75 minutes

Product & Services Catalog Set Up:

- Topic: This course explains the configuration and pricing of all services performed and all products sold for purposes of billing, prescriptions and orders.
- Prerequisites: None
- Recommended for: Persons responsible for the data entry of products and services
- Approximate Duration: 60 minutes

Provider Focused Administrative Set Up:

- Topic: The focus of this session is set up as it directly relates to the encounters. Including but not limited to Common Services, Care Plans, and Encounters
- Prerequisite: None
• Recommended for: Providers responsible for the defining a practice’s encounter templates  
• Approximate Duration: 60 minutes

**EHR Data Entry:**

• Topic: In this course, a complete walk through of a comprehensive encounter will be provided with training on the entry of clinical data including history, test results, and prescriptions. In addition, the use of care plans and the completion of the assessment, plan, and coding of the exam will be covered.  
• Prerequisites: None, with the recommendation that the person(s) that will be attending the Provider Focused Administrative Set Up webinar attend EHR Data Entry second to Provider Focused Administrative Set Up  
• Recommended for: All providers, scribes, and optometric technicians  
• Approximate Duration: 90 minutes

**Patient Module & Tasks:**

• Topic: Two areas are covered in this course. An overview will be provided of each component that makes up a patient file; with emphasis on Demographics, Family and Insurance. In addition, instructions on the use of the Tasks Module will be provided.  
• Prerequisites: None  
• Recommended for: All doctors and staff  
• Approximate Duration: 75 minutes

**Patient Check in/Check out:**

• Topic: This course covers the Front desk procedures required for checking in a patient at the start of an encounter, and checking out a patient at the end of an encounter. This webinar is the first session to address patient and insurance invoicing related to billing of the encounter. Further invoice functionality will be covered in the Orders and Order Billing webinar.  
• Prerequisites: Patient Module/Tasks  
• Recommended for: Any person in the office that may complete all or part of patient check in or check out procedures  
• Approximate Duration: 60 minutes

**Scheduling:**

• Topic: An overview of the Schedule Module is the focus of this course. You will learn how to book appointments, set busy time, office closed, and employee hours. An
introduction to the use of appointment “slots” is included as well as instruction on using the Scheduling Reports.

- Prerequisites: Patient Module/Tasks
- Recommended for: Any person in the office that books appointments or simply needs to view and understand the day’s schedule
- Approximate Duration: 75 minutes

Orders & Order Billing:

- Topic: Detailed instructions relating to the creation, tracking, and billing of eyeglass and contact lens orders are covered in this course. Billing information covered is a continuation of the training related to invoices that was first covered during the Patient Check in/Check out webinar.
- Prerequisites: Patient Module/Tasks and Patient Check in/Check out
- Recommended for: Opticians, CL Techs, and anyone requiring a comprehensive understanding of applying charges and transfers to both patient and insurance payers.
- Approximate Duration: 75 minutes

Accounting:

- Topic: This course covers the navigation of the Accounting Module for purposes of searching invoices and the creation of patient statements. An overview of Accounting Reports and insurance payment data entry will also be provided.
- Prerequisites: Patient Check in/Check out and Orders/Order billing
- Recommended for: Office administrators and billing staff
- Approximate Duration: 75 minutes
Self-Guided Go Live Checklist

☐ Data Transfer Scheduled
   Date: ____________________________

☐ Core Training Courses Completed

<table>
<thead>
<tr>
<th>Course</th>
<th>Data Completed</th>
<th>Course</th>
<th>Date Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Admin</td>
<td></td>
<td>Scheduling</td>
<td></td>
</tr>
<tr>
<td>Inventory</td>
<td></td>
<td>Patient Check in/out</td>
<td></td>
</tr>
<tr>
<td>Provider Admin</td>
<td></td>
<td>Orders and Order Billing</td>
<td></td>
</tr>
<tr>
<td>EHR Data Entry</td>
<td></td>
<td>Accounting</td>
<td></td>
</tr>
<tr>
<td>Patient Module / Task</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ Supplemental Material Reviewed (Sections 5 – 7)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Reviewed</th>
<th>Topic</th>
<th>Reviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter Templates</td>
<td>□</td>
<td>Claims Integrations</td>
<td>□</td>
</tr>
<tr>
<td>Fee Schedules</td>
<td>□</td>
<td>RxMT Integration</td>
<td>□</td>
</tr>
<tr>
<td>Appointment Slots</td>
<td>□</td>
<td>VSP Integration</td>
<td>□</td>
</tr>
<tr>
<td>Patient Portal</td>
<td>□</td>
<td>VisionWeb Integration</td>
<td>□</td>
</tr>
<tr>
<td>Vision Web Integration</td>
<td>□</td>
<td>Meaningful Use</td>
<td>□</td>
</tr>
<tr>
<td>Physical Inventory</td>
<td>□</td>
<td>Query Builder</td>
<td>□</td>
</tr>
<tr>
<td>Inventory Reports</td>
<td>□</td>
<td>Recorded Webinars</td>
<td>□</td>
</tr>
<tr>
<td>Device Integration</td>
<td>□</td>
<td>Pt. Communication</td>
<td>□</td>
</tr>
</tbody>
</table>

☐ Technology Audited

<table>
<thead>
<tr>
<th>Topic</th>
<th>Reviewed</th>
<th>Topic</th>
<th>Reviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Speed</td>
<td>□</td>
<td>Computer Specs</td>
<td>□</td>
</tr>
</tbody>
</table>