



RevolutionEHR

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RevolutionEHR Release Addendum

VSP/Eyefinity Integration

User's Guide

Overview

This document provides instructions for how to use the VSP/Eyefinity eligibility and authorization services available in RevolutionEHR.

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1. Eyefinity Fees

It is important that the user be aware that fees will be incurred when using the Eyefinity/VSP interface. Note that these fees are **not** charged by RevolutionEHR and will not affect your monthly access fee. All costs involved are charged by Eyefinity and will be billed to you by Eyefinity. Any questions or concerns regarding these fees should be directed to Eyefinity.

1.1 Set Up

Eyefinity will charge a one time set up fee of \$125.00 **for each office location**.

1.2 Eligibility

There is no charge for checking eligibility.

1.3 Authorizations

Authorizations will be billed to the office by Eyefinity at a cost of \$0.29 per authorization

1.4 Claims/Orders

When integration is built on the claims/orders, offices will be billed by Eyefinity at a cost of \$0.39 per claim/order

2. Eyefinity/VSP Configuration

Before a link to Eyefinity can be configured within RevolutionEHR, the user must contact Eyefinity to initiate the process and “turn on” the integration. It is necessary to repeat this process **for each office location** in your practice.

Once Eyefinity has been contacted it will take them up to one day to process your request. You will not be able to use the integration until your request is processed with Eyefinity, so plan to contact them at least one day in advance of implementing this new feature.

2.1 Contact Eyefinity

2.1.1 Phone Number

Call Eyefinity Customer Care at 877-448-0707. Select option “1” when prompted.

2.1.2 Information to provide to Eyefinity

When speaking with an Eyefinity Customer Care representative, you will be asked to provide your office phone number.

Inform your Eyefinity rep that you are calling to set up integration with your practice management software, which is RevolutionEHR.

At this point, the Eyefinity rep will start the process needed to “turn on” the integration for your office.

2.2 Configure your location in RevolutionEHR

Once your location has been “turned on” by Eyefinity, you may then configure your location to integrate with Eyefinity.

2.2.1 Set Up in RevolutionEHR

- a. Go to Administration/General/Locations
- b. Select the appropriate location from the location listing on the right, and open the file for that location
- c. Click on the “Eyefinity/VSP Configuration” slider in the bottom left

- d. Click "Edit"; your office phone number will show up automatically in the field for "Office Phone". If the office phone number you give when contacting Eyefinity is different, change the phone number in this field.
- e. Enter your "Login Name" and "Login Password" – This information is the same login name and password that you currently use when logging into the Eyefinity website.
- f. Click "Refresh Info"; a window will pop up displaying the offices that match the information you entered. Click on the appropriate office and click "Select". This will populate the "Office ID", "Payment Account Name", and "Payment Acct ID". If no office information appears when you click "Refresh Info", contact Eyefinity Customer Care at the number provided above to verify that your location has been set up.
- g. To complete the set up process, you must agree to accept the terms provided to you by Eyefinity.
- h. Select a provider from the "On behalf of" drop down. Terms can be accepted on behalf of any provider within your practice.
- i. Click "Accept Terms" in the bottom right; "Accepted", "Accepted On", and "Accepted By" will populate automatically.
- j. Click "Update"

2.3 Configure your VSP Insurance Company in RevolutionEHR

When using the Eyefinity/VSP integration within RevolutionEHR features like policy number look up and eligibility check are available only for VSP. In Administration/Vendors, Partners/Insurance Companies, confirm that the VSP insurance file is set up with the name "VSP" or "Vision Service Plan". Any other insurance name will not allow for the new features.

3. Using the Interface

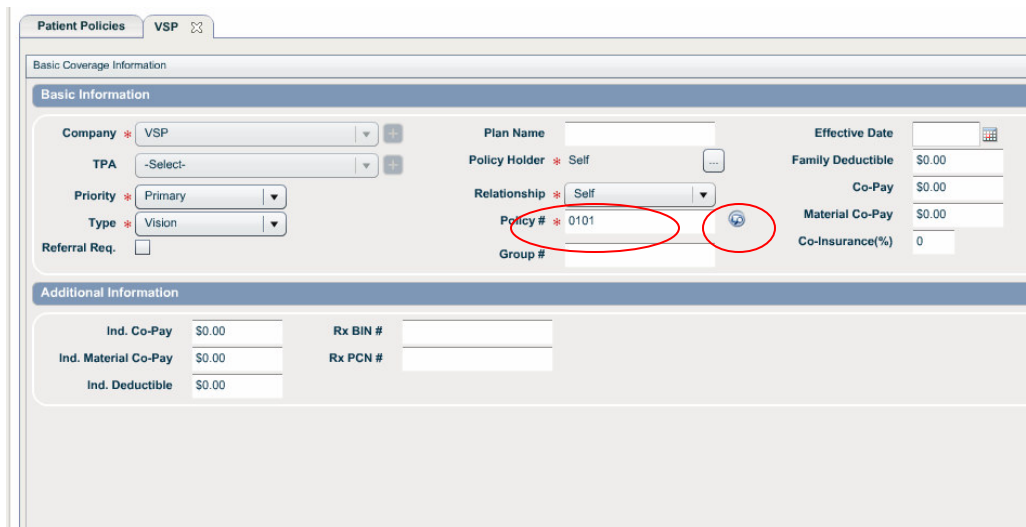
3.1 Member Look Up

RevolutionEHR provides you the ability to search for a policy holder's number if you have only been given the last 4 digits of this number.

Because VSP policy numbers are based on the policy holder's full social security number, it is necessary to obtain that number before eligibility and authorizations can be accessed.

If you have been provided with only the last 4 digits, enter this in as the "policy number" for the patient's coverage information; click the look up icon to the right of the policy number field.

If you have the full policy number, using the look up is not required before checking eligibility and obtaining authorizations.



The screenshot shows the 'Patient Policies' interface for VSP. The 'Basic Information' section contains the following fields:

- Company: VSP
- TPA: -Select-
- Priority: Primary
- Type: Vision
- Referral Req.: ☐
- Plan Name: [Empty]
- Policy Holder: Self
- Relationship: Self
- Policy #: 0101 (circled in red)
- Group #: [Empty]
- Effective Date: [Empty]
- Family Deductible: \$0.00
- Co-Pay: \$0.00
- Material Co-Pay: \$0.00
- Co-Insurance(%): 0

The 'Additional Information' section contains the following fields:

- Ind. Co-Pay: \$0.00
- Ind. Material Co-Pay: \$0.00
- Ind. Deductible: \$0.00
- Rx BIN #: [Empty]
- Rx PCN #: [Empty]

Click "Lookup"

Click on the policy holder's name from the Member Search Results list

Click "Select"

revolutionEHR VSP Member Lookup

Member Lookup

Policy Holder SSN (Last 4) 0101

Member Search Results

Name	ID	DOB	Group Name	Group ID
DARWIN, CHARLES	360150101		BENEFITS A, B, C, D, & V	1234567800010001

Previous

Plan information, Policy #, and Group # will fill automatically

Click "Update"

Patient Policies VSP

Basic Coverage Information

Basic Information

Company: VSP Plan Name: BENEFITS A, B, C, D, & V Effective Date:

TPA: -Select- Policy Holder: Self Family Deductible: \$0.00

Priority: Primary Relationship: Self Co-Pay: \$0.00

Type: Vision Policy #: 360150101 Material Co-Pay: \$0.00

Referral Req. ☐ Group #: 1234567800010001 Co-Insurance(%): 0

Additional Information

Ind. Co-Pay: \$0.00 Rx BIN #:

Ind. Material Co-Pay: \$0.00 Rx PCN #:

Ind. Deductible: \$0.00

Policy Holder Benefits

Patient Benefits

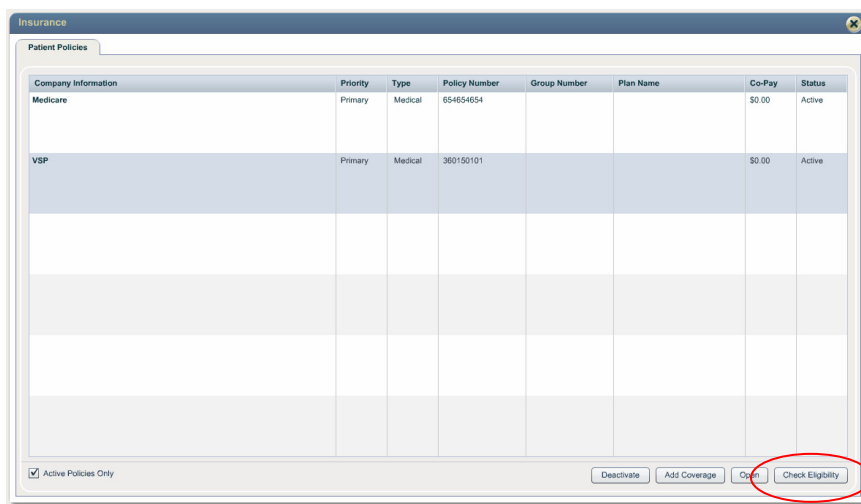
Authorizations

3.2 Checking Eligibility

Eligibility check is available in several areas within RevolutionEHR. Once the appropriate coverage information has been entered, you may check eligibility from: the coverage file for VSP within the patient's file; the Patient Policies list found in the Insurance component in the patient's file; the insurance slider found in appointment details within Scheduling; the billing screen within an encounter; the billing slider within an order.

Regardless of where "check eligibility" is selected, the functionality is the same.

Click "Check Eligibility" (In this example we are checking eligibility from the patient policies list found in the Insurance component in the patient's file:

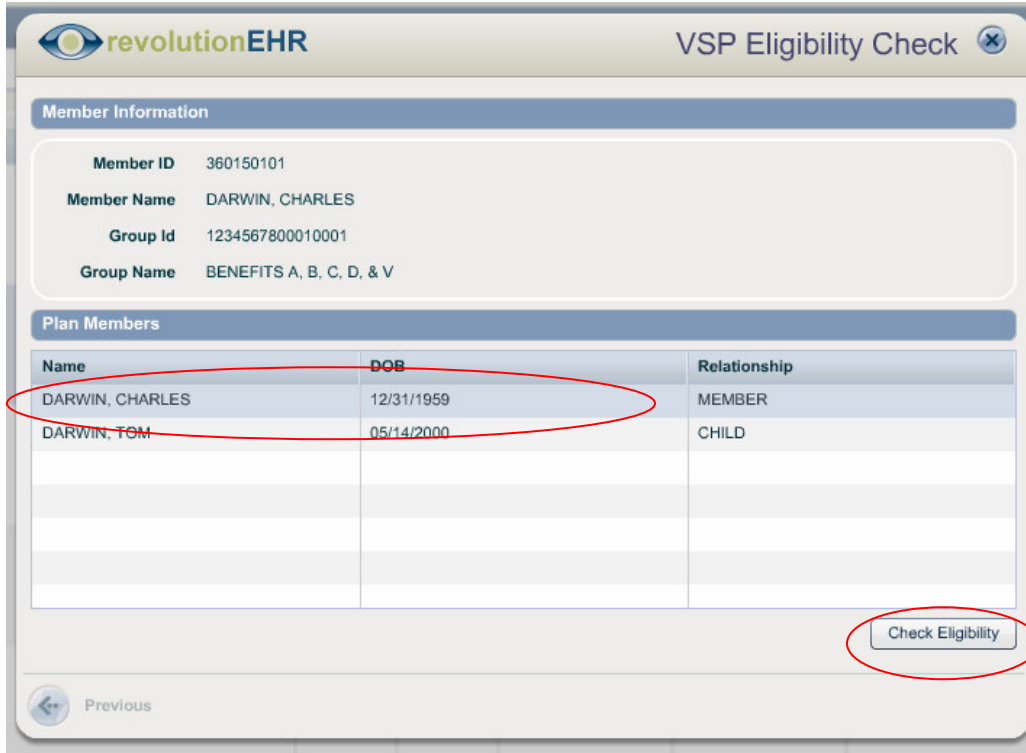


Company Information	Priority	Type	Policy Number	Group Number	Plan Name	Co-Pay	Status
Medicare	Primary	Medical	654654654			\$0.00	Active
VSP	Primary	Medical	360150101			\$0.00	Active

☒ Active Policies Only

Deactivate Add Coverage Open **Check Eligibility**

The "VSP Eligibility" pop up screen will display all family members covered under that policy. To view the benefits for a plan member, double-click on the appropriate plan member or select the plan member and click the "Check Eligibility" button.



Member Information

Member ID: 360150101
 Member Name: DARWIN, CHARLES
 Group Id: 1234567800010001
 Group Name: BENEFITS A, B, C, D, & V


Plan Members

Name	DOB	Relationship
DARWIN, CHARLES	12/31/1959	MEMBER
DARWIN, TOM	05/14/2000	CHILD

[Check Eligibility](#)

[Previous](#)

If the patient is not listed in the list of plan members, you *may* be able to add the patient/dependent to the member's plan from this screen. If the VSP plan does not track dependents, you can add the new dependent by pressing the "Add <Patient Name>" button as shown below.


VSP Eligibility Check X

Member Information

Member ID 360150101

Member Name DARWIN, CHARLES

Group Id 1234567800010001

Group Name BENEFITS A, B, C, D, & V

Track Dependents N

Plan Members

Name	DOB	Relationship
DARWIN, CHARLES	12/31/1959	MEMBER
DARWIN, TOM	05/14/2000	CHILD
DARWIN, SHELIA	02/01/1994	CHILD
DARWIN, MARK	12/31/1954	SPOUSE
DARWIN, BLAH	02/01/1966	CHILD
DARWIN, SHANE	01/31/1988	STUDENT

Add Michael Darwin
Check Eligibility

←
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This will bring up the standard eligibility/benefits screen as described below.

IMPORTANT NOTE: The patient will NOT be added to the plan until an authorization has been obtained for the patient.

As shown below, the plan benefits for this patient will be displayed on the left. To view the services available for a specific plan, click on the plan name. The services will be displayed on the right.

Eligibility for a particular service will be noted in the "Avail" column on the right. Available services will be indicated by "Yes" in this column. Unavailable services will be indicated by "N/A"

Clicking on a different plan on the left will display the services for that plan on the right.

Because eligibility information can change at anytime, this information is not stored in RevolutionEHR. All eligibility checks should be done in "real time".


revolutionEHR

VSP Eligibility Check 

Member Information

Member ID 360150101
Member Name DARWIN, CHARLES
Group ID 1234567800010001
Group Name BENEFITS A, B, C, D, & V

Plan Member Name DARWIN, CHARLES
Plan Member DOB 12/31/1959
Plan Member Rel. MEMBER

Plan Benefits

Name	Deductible	Allowable
SIGNATURE	\$25.00	\$105.00
2ND PAIR	\$20.00	\$105.00
VDT	\$10.00	\$0.00
COVERED CONTACTS	\$50.00	\$0.00
PRIMARY EYE CARE	\$5.00	\$0.00

SIGNATURE Services

Name	Status	Avail	Avail Date
EXAM	AUTHORIZED	N/A	N/A
LENS	AVAILABLE	YES	06/06/10007
FRAME	AUTHORIZED	N/A	N/A
CL	AVAILABLE	YES	06/06/10007

Effective Date

01/27/2009 

Get Authorization


Get Authorization

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3.3 Obtain an Authorization

A VSP authorization can be obtained after eligibility has been verified. To obtain an authorization follow the steps listed above for checking eligibility. From the "VSP Eligibility Check" screen, select the appropriate plan or service and click "Get Authorization".

Please note that if you wish to authorize all services available for a specific plan use the "Get Authorization" button located at the bottom of the "Plan Benefits" list. Only use the "Get Authorization" button at the bottom of the services list if you wish to only authorize a single service. To authorize a single service you must first click and highlight that service.



Member Information

Member ID	360150101	Plan Member Name	DARWIN, CHARLES
Member Name	DARWIN, CHARLES	Plan Member DOB	12/31/1959
Group ID	1234567800010001	Plan Member Rel.	MEMBER
Group Name	BENEFITS A, B, C, D, & V		

Plan Benefits

Name	Deductible	Allowable
SIGNATURE	\$25.00	\$105.00
2ND PAIR	\$20.00	\$105.00
VDT	\$10.00	\$0.00
COVERED CONTACTS	\$50.00	\$0.00
PRIMARY EYE CARE	\$5.00	\$0.00

SIGNATURE Services

Name	Status	Avail	Avail Date
EXAM	AUTHORIZED	N/A	N/A
LENS	AVAILABLE	YES	06/06/10007
FRAME	AUTHORIZED	N/A	N/A
CL	AVAILABLE	YES	06/06/10007

Effective Date: 01/27/2009

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Get Authorization (Plan Benefits) **Authorizes all services in this plan**

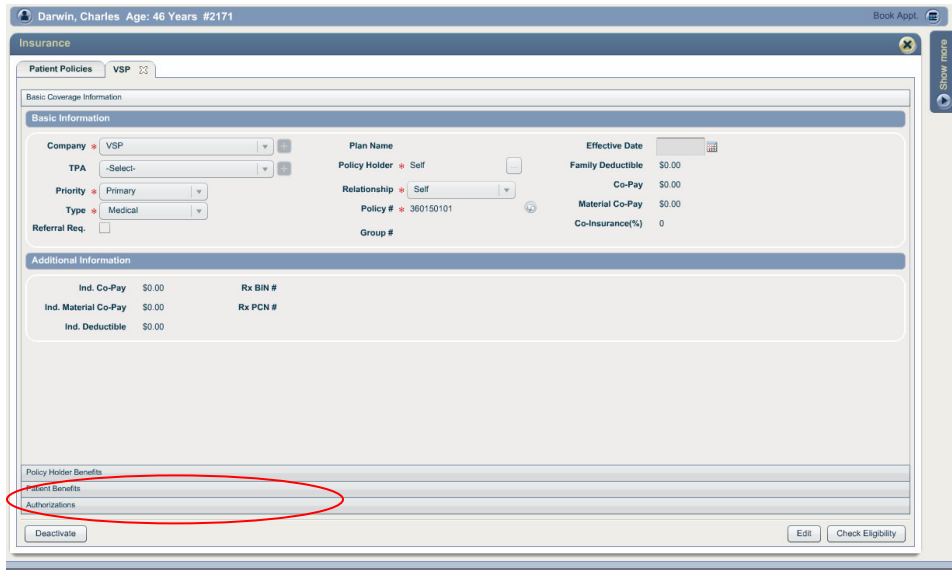
Get Authorization (Signature Services) **Authorizes a single service in the plan**

NOTE: You may only obtain authorizations for the patient whose record you are currently viewing.

3.4 Viewing Authorization History

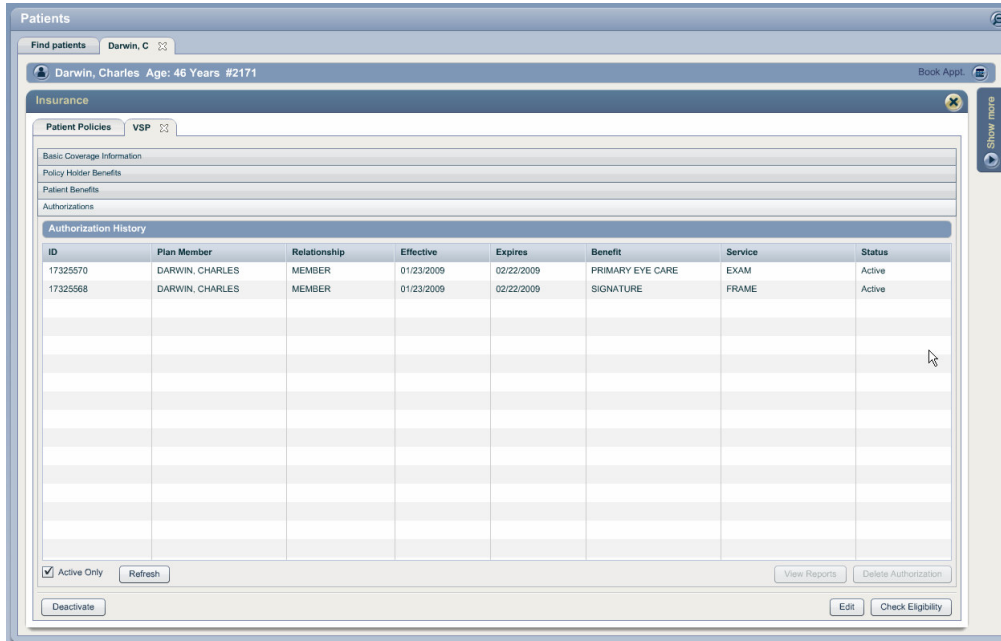
Once services have been authorized for a patient, the authorization(s) are stored in the VSP coverage file located in the insurance component within the patient's file.

With the coverage file open, click on the "Authorizations" slider



The screenshot shows the 'Insurance' tab for patient Darwin, Charles (Age: 46 Years, #2171). The 'Patient Policies' section is active, showing 'VSP' as the company. The 'Basic Coverage Information' section includes fields for Company, TPA, Priority, Type, Referral Req, Plan Name, Policy Holder, Relationship, Policy #, Group #, Effective Date, Family Deductible, Co-Pay, Material Co-Pay, and Co-Insurance(%). The 'Additional Information' section includes Ind. Co-Pay, Ind. Material Co-Pay, Ind. Deductible, Rx BIN #, and Rx PCN #. The 'Policy Holder Benefits' section is expanded, showing 'Patient Benefits' and 'Authorizations' (highlighted with a red circle). The 'Deactivate' button is visible at the bottom left.

All authorizations for this patient will be listed here



The screenshot shows the 'Patients' tab for patient Darwin, Charles (Age: 46 Years, #2171). The 'Insurance' tab is active, and the 'Authorization History' table is displayed. The table has columns for ID, Plan Member, Relationship, Effective, Expires, Benefit, Service, and Status. Two rows of authorization history are shown.

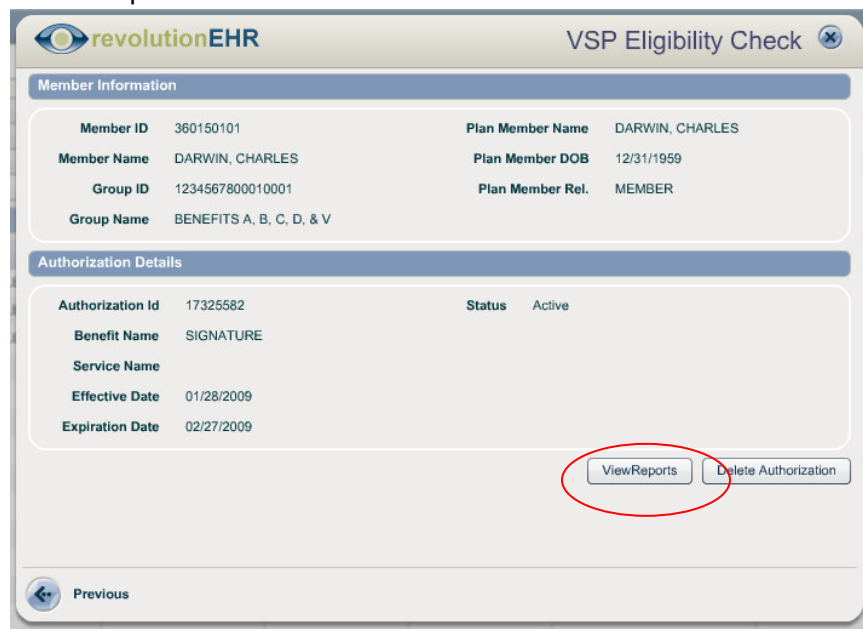
ID	Plan Member	Relationship	Effective	Expires	Benefit	Service	Status
17325570	DARWIN, CHARLES	MEMBER	01/23/2009	02/22/2009	PRIMARY EYE CARE	EXAM	Active
17325568	DARWIN, CHARLES	MEMBER	01/23/2009	02/22/2009	SIGNATURE	FRAME	Active

At the bottom of the table, there are buttons for 'Active Only', 'Refresh', 'View Reports', 'Delete Authorization', 'Deactivate', 'Edit', and 'Check Eligibility'.

3.5 Viewing Authorization Reports

3.5.1 Viewing the reports while authorizing

After clicking "Get Authorization", the VSP Eligibility Check screen will display the authorization details. To view reports related to this authorization click "View Reports"



revolutionEHR VSP Eligibility Check

Member Information

Member ID	360150101	Plan Member Name	DARWIN, CHARLES
Member Name	DARWIN, CHARLES	Plan Member DOB	12/31/1959
Group ID	1234567800010001	Plan Member Rel.	MEMBER
Group Name	BENEFITS A, B, C, D, & V		

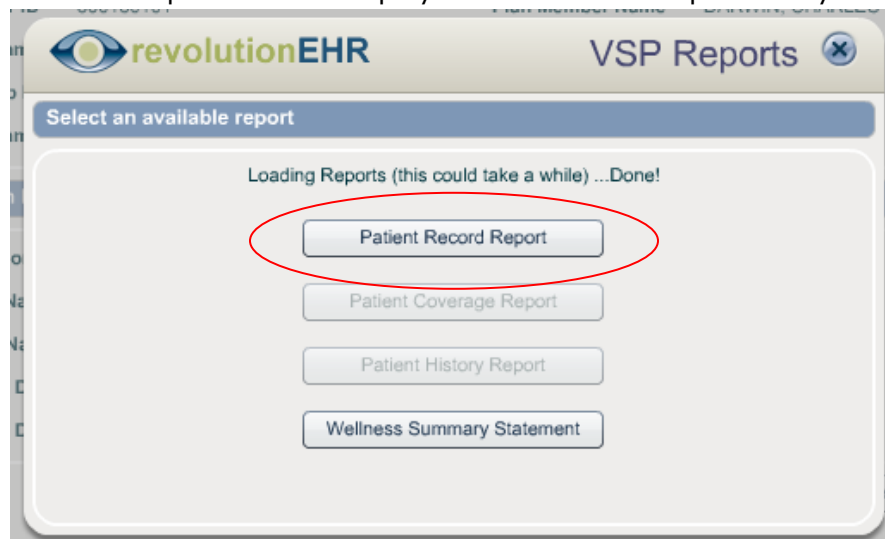
Authorization Details

Authorization Id	17325582	Status	Active
Benefit Name	SIGNATURE		
Service Name			
Effective Date	01/28/2009		
Expiration Date	02/27/2009		

ViewReports Delete Authorization

Previous

Available reports will be displayed. Click on the report that you wish to view



revolutionEHR VSP Reports

Select an available report

Loading Reports (this could take a while) ...Done!

Patient Record Report

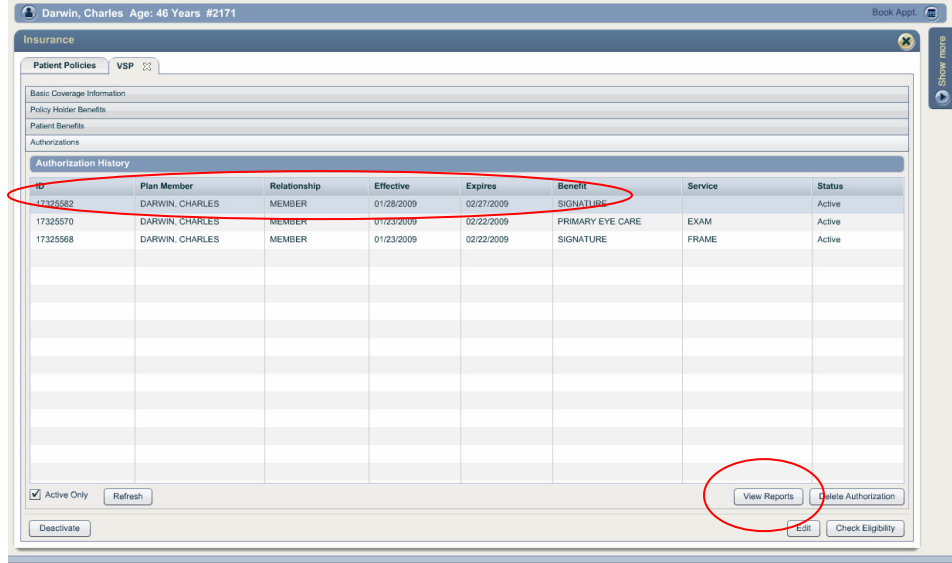
Patient Coverage Report

Patient History Report

Wellness Summary Statement

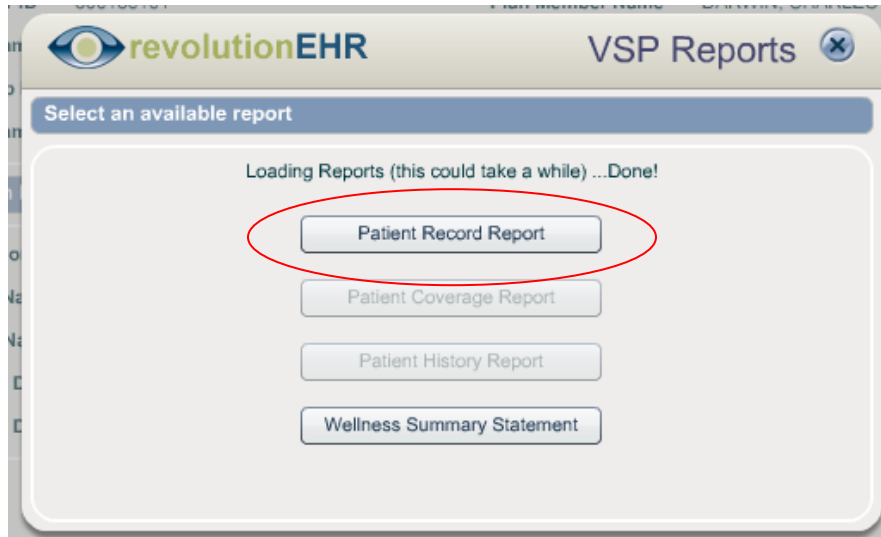
3.5.2 Viewing the reports at a later date

Authorization reports can be viewed at anytime. Refer to 3.4 Viewing the Authorization History to locate the appropriate authorization. Select the authorization you wish to view and click "View Reports"



ID	Plan Member	Relationship	Effective	Expires	Benefit	Service	Status
17325582	DARWIN, CHARLES	MEMBER	01/28/2009	02/27/2009	SIGNATURE		Active
17325570	DARWIN, CHARLES	MEMBER	01/23/2009	02/22/2009	PRIMARY EYE CARE	EXAM	Active
17325568	DARWIN, CHARLES	MEMBER	01/23/2009	02/22/2009	SIGNATURE	FRAME	Active

Available reports will be displayed. Click on the report that you wish to view



Select an available report

Loading Reports (this could take a while) ...Done!

Patient Record Report

Patient Coverage Report

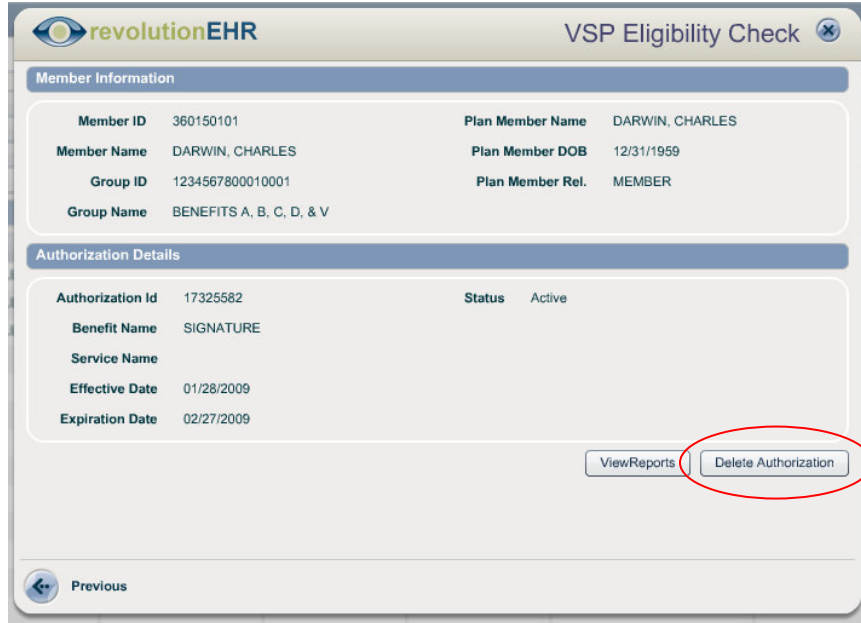
Patient History Report

Wellness Summary Statement

3.6 Deleting an Authorization

3.6.1 Delete an Authorization immediately after authorizing

After clicking "Get Authorization", the VSP Eligibility Check screen will display the authorization details. To delete this authorization click "Delete Authorization"



Member Information

Member ID	360150101	Plan Member Name	DARWIN, CHARLES
Member Name	DARWIN, CHARLES	Plan Member DOB	12/31/1959
Group ID	1234567800010001	Plan Member Rel.	MEMBER
Group Name	BENEFITS A, B, C, D, & V		

Authorization Details

Authorization Id	17325582	Status	Active
Benefit Name	SIGNATURE		
Service Name			
Effective Date	01/28/2009		
Expiration Date	02/27/2009		

ViewReports **Delete Authorization**

Previous

3.6.2 Deleting an Authorization at a later date

Authorization can be deleted at anytime. Refer to 3.4 - Viewing the Authorization History to locate the appropriate authorization. Select the authorization you wish to delete and click "Delete Authorization"

Darwin, Charles Age: 46 Years #2171

Insurance

Patient Policies VSP

Basic Coverage Information

Policy Holder Benefits

Patient Benefits

Authorizations

Authorization History

ID	Plan Member	Relationship	Effective	Expires	Benefit	Service	Status
17325582	DARWIN, CHARLES	MEMBER	01/28/2009	02/27/2009	SIGNATURE		Active
17325570	DARWIN, CHARLES	MEMBER	01/23/2009	02/22/2009	PRIMARY EYE CARE	EXAM	Active
17325568	DARWIN, CHARLES	MEMBER	01/23/2009	02/22/2009	SIGNATURE	FRAME	Active

☒ Active Only

3.7 Non-child dependents

If a child of a member is over 18 years old, some plans allow for that child to be added to the member's plan. For these situations, prior to adding this dependent, set the relationship of the older child to "Student" on the patient insurance details screen as shown below:

Insurance

Patient Policies VSP

Basic Coverage Information

Basic Information

Company: VSP

TPA: -Select-

Priority: Primary

Type: Medical

Referral Req. ☐

Plan Name

Policy Holder: Darwin, Charles

Relationship: Student

Policy #: Spouse

Group #: Other

Effective Date

Family Deductible: \$0.00

Co-Pay: \$0.00

Material Co-Pay: \$0.00

Co-Insurance(%): 0

Additional Information

Ind. Co-Pay: \$0.00

Ind. Material Co-Pay: \$0.00

Ind. Deductible: \$0.00

Rx BIN #

Rx PCN #

Policy Holder Benefits

Patient Benefits

Authorizations

3.8 Using an authorization for a claim

Claim submission is currently not available through RevolutionEHR. Additional user guides will be provided when this feature is complete.

4. FAQ

Why isn't the "look up" button finding the right policy information?

- If the patient is not the policy holder is it important to first set the appropriate policy holder in the patient's insurance coverage information. The "look up" function will use the association of the patient and the policy holder to provide the appropriate selection. Without the appropriate policy holder set, "look up" will not work.
- When using the "look up" icon to find the policy and group number using the last four digits of the social security number, it is important that the field for "Group #" and "Plan Name" be empty. This is information that will be provided by Eyefinity during the lookup and having incorrect information in these fields can prevent a successful look up.
- The first and last name of the patient and the policy holder must be entered into RevolutionEHR **exactly** the same way that Eyefinity/VSP have it on file.

I changed the policy holder, but am still getting an error with the "look up" option?

- If you open existing coverage and change the policy holder is it necessary to hit "update" to save your changes before you can "edit" and use the look up icon.

What does "Special Eligibility Handling Required" mean?

- Occasionally it is necessary to call Eyefinity to obtain an authorization due to the type of policy. If this message is received when using the Eyefinity website directly to obtain an authorization, then using the RevolutionEHR integration will produce the same message.
- If an eligibility/authorization cannot be obtained directly through the Eyefinity website, it will not be available through RevolutionEHR.

The child is over 18 and Eyefinity normally requires me to indicate that this patient is a full time student. How is this handled through RevolutionEHR?

- If the patient is a child over 18 and also a full time student you must set the "relationship" to the policy holder as "student" in the VSP coverage file for that patient.

I am getting an error message when trying to check eligibility

Check the accuracy of the data you have for that patient entered into RevolutionEHR

- The policy number must match Eyefinity exactly. Using the look up icon can assure your accuracy on the policy number. However, a manually entered policy number will allow for eligibility/authorization if entered correctly.
- The patient and policy holder names as they are entered into RevolutionEHR must also match Eyefinity exactly. If your patient has first name entered as "Bill", but Eyefinity lists this patient by first name "William", the eligibility check will result in an error.

I am trying to add another dependent, but do not get that option?

- The ability to add a new dependent under a specific policy holder is limited only to those policies that allow this. From the "Check Eligibility" pop up, if "Track Dependents" is showing as "Y", VSP does not allow for new dependents to be added. For these policies you must contact Eyefinity/VSP directly.
- If "Track Dependents" is showing as "N" you have the ability to add new dependents without the need to contact Eyefinity. See section 3.2 Checking Eligibility of this manual for instructions on adding a new dependent.