

### Section 1

#### The Scheduler

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- Rescheduling Appointments
- Canceling Appointments
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- ✓ Chief Compliant Categories List
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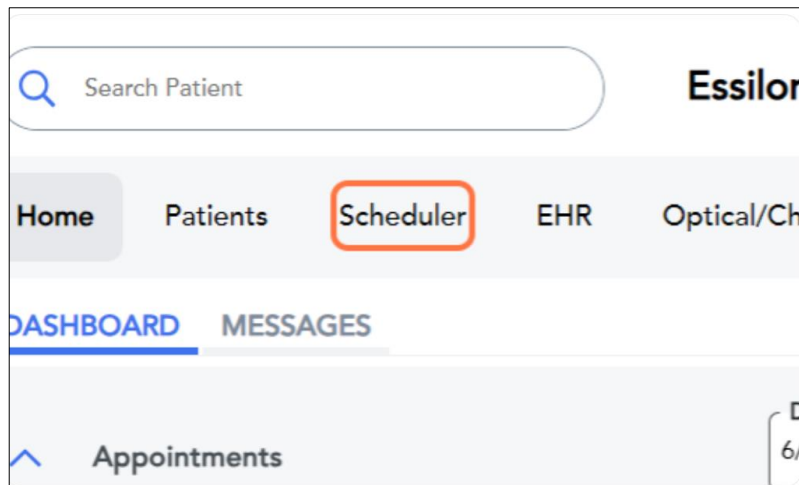
**Technical Issues:** Store System Support Escalation Line 833-467-4244

**General Questions:** Eclips Office Hours Every Thursday at 1:00 EST (TEAMS)

# ECLIPS GUIDE

## Creating Appointments

1. Select Scheduler from the top tool bar:



2. Select the appropriate time and date for the appointment  
3. Select (a) for an appointment:

TAB Symbols			
Confirmation/reference number			
Search			
day	>	Calendar	Jump Ahead: weeks Go
Moore	A. Smith	A. Smith	Next E
(e)	(a) (e)	(a) (e)	0
(e)	(a) (e)	(a) (e)	0
(e)	(a) (e)	(a) (e)	0
(e)	(a) (e)	Courtney Conner CL CK 7	0
(e)	(a) (e)	(a) (e)	0
(e)	Judy Early EP E	(a) (e)	0
(e)	Lou B Gibson EP E	(a) (e)	0
(e)	(a) (e)	(a) (e)	0
(e)	Janice M Edge OCT	(a) (e)	0
(e)	(a) (e)	(a) (e)	0

**Note:** Blue slots are for available appointment. White slots are for walk in, emergency or work in appointments.

**Note:** (e) is reserved for blocking events such as lunch.

4. Enter all patient demographics into the appropriate sections (gather from patient at this time) and will be noted by a red \*



# ECLIPS GUIDE

## Creating Appointments

5. If the patient is already within your Eclips database, simply select from the list provided
6. Click Add patient:

Test Ramsubhag, David	12/14/1990	(203)610-1616	2555 court dr., gastonia, NC 28203 meggriff13@gmail.com 1398 Kildaire Farm Rd Cary, NC 275
Test Williams, Deana	08/27/1995	(919)222-3333	141 Kildaire Farm Rd Cary, NC 275
Test, Dale	11/01/1961		na@gmail.com
Test, Danielle	07/26/1994	(919)999-9999	sanfordtech@trianglevisions.com 123 Sesame Street Sanford, NC 275
Test, Davis	05/26/1978	(999)999-9999	test@test.com 123 Anywhere Lane Raleigh, NC 275
Test, Devin	04/16/1981	(919)999-0909	205 Tower View Ln Sanford, NC 275
Test, DoinaTest	01/01/2022	(555)555-3922	
Test, Doinatest	01/01/1990	(555)555-5555	
Test, Doingatest	01/01/1990	(804)457-1113	
Test, Donna	01/01/1978	(239)896-7862	
Test, Downs	05/13/1988	(864)520-2480	

7. Patient will now appear on the schedule in the appropriate slot:

	A. Smith	Next E
	(a) (e)	0
	(a) (e)	0
	(a) (e)	0
	Courtney Conner CL CK 7	0
	Doinga Test F	0
y EP E 	(a) (e)	0
pson EP E 	(a) (e)	0
	(a) (e)	0
Edge OCT	(a) (e)	0
	(a) (e)	0

# ECLIPS GUIDE

## Rescheduling Appointments

1. Select the appointment to reschedule:

	A. Smith	Next E
	(a) (e)	0
	(a) (e)	0
	(a) (e)	0
	Courtney Conner CL CK 7	0
	Doinga Test F	0
y EP E	(a) (e)	0
pson EP E	(a) (e)	0
	(a) (e)	0
Edge OCT	(a) (e)	0
	(a) (e)	0

2. Scroll to the bottom of the screen, select cut from the bottom tool bar:

e patient "Is it OK if we call you with a live or pre-recorded appointment  
mail notifications, for example eye exam reminder Postcards.  
ications. !

< Back Cancel Cut Arrived Finished

3. Select a new slot (P) and paste the new appointment:



(p)	(p)	0
(p)	(p)	0
(p)	(p)	0
(p)	Courtney Conner CL CK 7	0
(p)	(p)	0
Judy Early EP E	(p)	0
Lou B Gibson EP E	(p)	0
(p)	(p)	0
Janice M Edge OCT	(p)	0
(p)	(p)	0
(p)	(p)	0
Morris R Hall EP E	(p)	0
(p)	(p-ck)	0

4. Appointment has now been rescheduled


# ECLIPS GUIDE

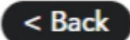
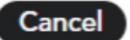

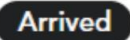
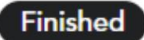
## Canceling Appointments

1. Select the appointment to cancel:

	A. Smith	Next Ex
	(a) (e)	0
	(a) (e)	0
	(a) (e)	0
	Courtney Conner CL CK 7	0
	Doinga Test F	0
y EP E 	(a) (e)	0
pson EP E 	(a) (e)	0
	(a) (e)	0
Edge OCT	(a) (e)	0
	(a) (e)	0

2. Scroll to the bottom, select Cancel from the black tool bar below:

e patient "Is it OK if we call you with a live or pre-recorded appoint  
mail notifications, for example eye exam reminder Postcards.  
ications. 

3. Appointment has now been cancelled

1. Select the patient to confirm:

	A. Smith	Next E
	(a) (e)	0
	(a) (e)	0
	(a) (e)	0
	Courtney Conner CL CK 7	0
	Doinga Test F	0
y EP E	(a) (e)	0
pson EP E	(a) (e)	0
	(a) (e)	0
Edge OCT	(a) (e)	0
	(a) (e)	0

2. Scroll to the bottom and select Arrive from the black tool bar from the bottom:

the patient "Is it OK if we call you with a live or pre-recorded appointment notifications, for example eye exam reminder Postcards. notifications. !

< Back Cancel Cut Arrived Finished

3. Patient now arrived in the system.



### Quick Reference

#### Appointment Color Codes

<b>red</b>	Unconfirmed	<b>forest green</b>	Online confirmed by office
<b>burgundy</b>	Confirmed	<b>pink</b>	Next Eye Exam unconfirmed
<b>light green</b>	Online unconfirmed	<b>purple</b>	Checked-In
<b>dark green</b>	Online confirmed	<b>blue</b>	Checked-Out
		<b>yellow</b>	Event

#### Finding/Updating Patient Information

- Click "search" button at top of screen.
- Enter last name or phone number and first name or DOB to locate patient and click search button.
- Click on patient's name.
- Update information.

#### Checking a Patient In

- Click on patient's appointment.
- Click "check in" button at bottom of screen.
- Appointment should turn purple.

#### Checking a Patient Out

- Click on patient's purple, checked-in appointment.
- Click "check out" button at bottom of screen.
- Click "Yes" to create the next Eye Exam for the patient.
- Complete required fields, including exam type. Click "Next."
- Click "OK" to add NEE info to clipboard at top right of screen.
- The calendar navigates to Unconfirmed NEE page 53, weeks ahead.
- Click "(p)" to paste the patient's information into her desired date and time.
- The Next Eye Exam appointment should turn pink.
- Click "Home" to return to schedule and current day's date.
- Checked out appointment should now be blue.

#### Moving the NEE to a Scheduled Appointment

- Click "search" button at top. Enter last name or phone number and first name or DOB to narrow search. Click "Search."
- Click "update" next to patient's Next Eye Exam.
- Click "cut" button at bottom of screen and "OK" to add patient's information to clipboard at top right of screen.
- Navigate calendar to appropriate day/time on Scheduled Appointments.
- Click "(p)" to paste appointment onto page.

#### Rescheduling a Patient

- Click on patient's name.
- Click "cut" button at bottom of screen and "OK" to add patient's information to clipboard at top right of screen.
- Navigate calendar to appropriate day/time on Scheduled Appointments.
- Click "(p)" to paste appointment onto page.

#### TAB Symbols

	Insurance billing approved
	Insurance billing pending
	Insurance billing declined
	Payment option unknown
	Cash or other payment
	Phone call placed by office
	Auto-phone call placed
	Appointment booked by EyeMed field rep
	Appointment booked by call center
	Recurring event
	Help or additional information

#### Accessing Reports

- Click "reports" button at top of screen.
- TAB defaults to the Schedule Report. Other reports can be accessed by clicking on the drop-down arrow to the right of the "print" button.
- Set appropriate parameters, such as beginning and ending time, Optometrist, etc.
- Click "refresh" button at top.
- Click "print" to print.

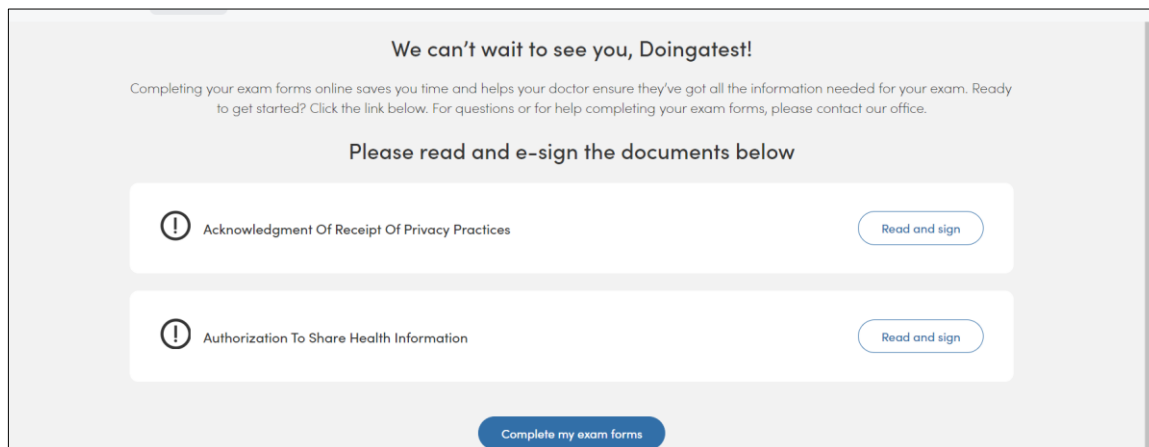
#### Exam symbols

- (a) Schedule an exam appointment
- (e) Schedule a check/follow-up appointment
- (ck) Schedule an Event
- (p) Paste an appointment from clipboard
- (nc) Schedule a new contacts appointment

# ECLIPS GUIDE

## Digital Intake Form


1. The Digital intake form will get automatically sent to patients 1 week and the again 72 hours prior to the patient scheduled appointment time:




We can't wait to see you, Doingatest!

Completing your exam forms online saves you time and helps your doctor ensure they've got all the information needed for your exam. Ready to get started? Click the link below. For questions or for help completing your exam forms, please contact our office.

Please read and e-sign the documents below

 Acknowledgment Of Receipt Of Privacy Practices

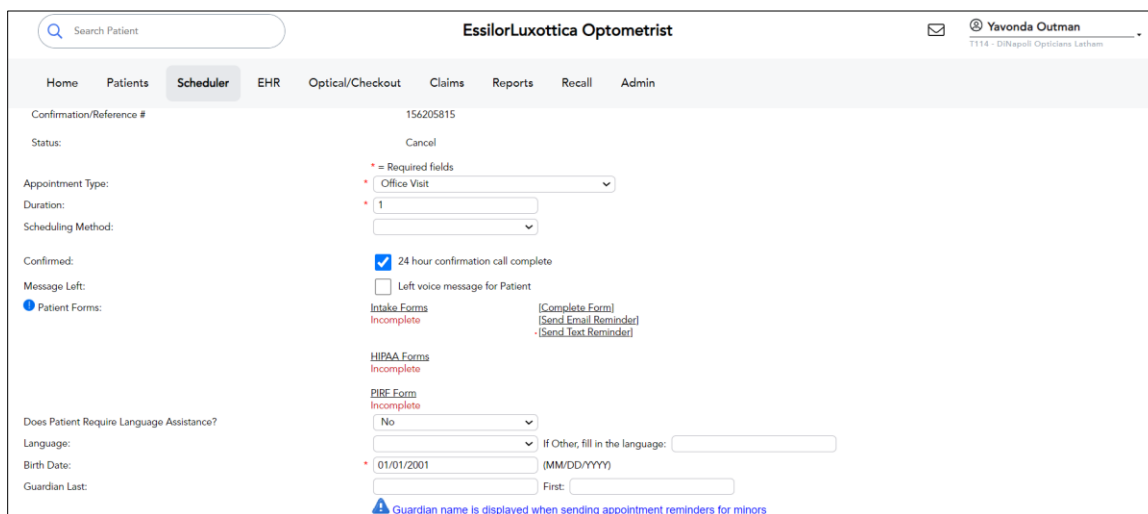
Read and sign

 Authorization To Share Health Information

Read and sign

Complete my exam forms

2. To resend DIF to a patient simply select the preferred communication method (email or text )and click Send Reminder:



Search Patient

EssilorLuxottica Optometrist

Yavonda Outman  
7114 - DIF@optics.latham

Home Patients **Scheduler** EHR Optical/Checkout Claims Reports Recall Admin

Confirmation/Reference # 156205815

Status: Cancel

Appointment Type: \* = Required fields  
Office Visit

Duration: \* 1

Scheduling Method: \*

Confirmed: ☒ 24 hour confirmation call complete  
☐ Left voice message for Patient

Message Left:

● Patient Forms:

Intake Forms  
Incomplete [Complete Form] [Send Email Reminder] [Send Text Reminder]

HIPAA Forms  
Incomplete

PIRF Form  
Incomplete

Does Patient Require Language Assistance? No

Language: If Other, fill in the language:

Birth Date: \* 01/01/2001 (MM/DD/YYYY)

Guardian Last: First:

Guardian name is displayed when sending appointment reminders for minors

**Note:** You have the option to complete the form for the patient by selecting Complete Form with the patient present or from their prior EHR data.



# ECLIPS GUIDE

## Adding Insurance

1. Access the patient either from the Home or Patient tab
2. Once the patient is selected select insurance on the left side to enter the insurance Section:

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

Create New Benefits Glance Sheet Invoice

William Test (31/M)

Chart Number PT1054  
Legacy Number  
Date of Birth 04/11/1992  
Patient Since 06/09/2023  
Preferred Provider  
Medical Insurance None

1: (608) 509-2142 Mobile Phone  
2: (608) 509-2142 Text

3. Click Insurance on the top right to add a plan:

Search Patient

EssilorLuxottica Optometrist

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

William Test (31/M)

PREferred COMMUNICATION NEXT SCHEDULED APPOINTMENT

1: (608) 509-2142 Mobile Phone  
2: (608) 509-2142 Text

Unapplied Payments: \$0

Insurance Name Policy Type Classification Insured ID Group # Insured Name Relation Status Action

No Insurance to display.

4. Next add the insurance details from the drop-down menu
5. Complete the following: Type Of Insurance, Valid Dates, Classifications, Active Status, ID Number, Auth # If Relevant, Primary Member, Any Notes, Etc.
6. Once finished click Save

**Note:** If the patient has not completed the Digital Intake Form, you will need to add the patient address.

Search Patient

EssilorLuxottica Optometrist

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

William Test (31/M)

PREferred COMMUNICATION NEXT SCHEDULED APPOINTMENT

1: (608) 509-2142 Mobile Phone  
2: (608) 509-2142 Text

Unapplied Payments: \$0

New Insurance

Details

Insurance Name EyeMed

Valid Dates Start Date 06/09/2023 End Date 06/09/2023

Classification Primary

Plan Name None

Group #

Insured ID 1234

Status Active

Policy Type Vision

Address 1234 Copy

CANCEL Save

7. Repeat prior steps if patient has additional insurance (Medical + Vision)
8. Once saved, select Benefits to tell Eclips what the benefits are:

Search Patient

EssilorLuxottica Optometrist

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

William Test (31/M)

PREferred COMMUNICATION NEXT SCHEDULED APPOINTMENT

1: (608) 509-2142 Mobile Phone  
2: (608) 509-2142 Text

Unapplied Payments: \$0

Create New Appointment Benefits Invoice

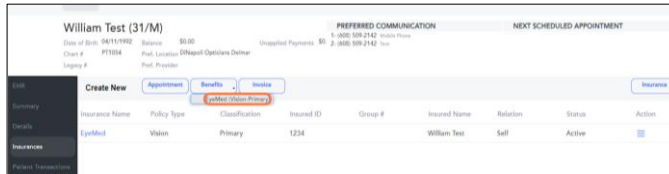
Insurance Name Policy Type Classification Insured ID Group # Insured Name Relation Status Action


EyeMed Vision Primary 1234 William Test Self Active

# ECLIPS GUIDE

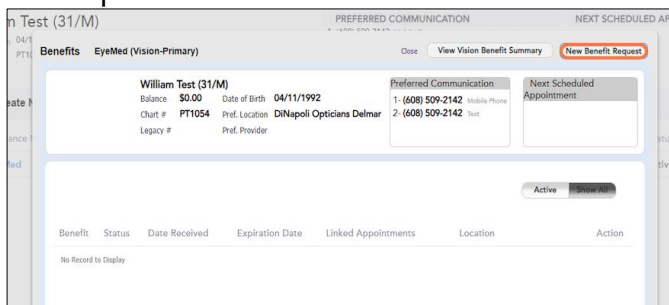
## Adding Insurance

9. From the pull-down bar select the plan you would like to update:



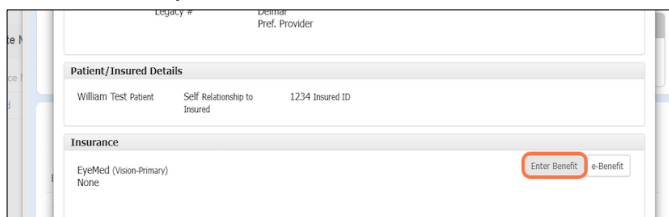
Insurance Name	Policy Type	Classification	Insured ID	Group #	Insured Name	Relation	Status	Action
EyeMed	Vision	Primary	1234		William Test	Self	Active	

10. Select New benefit request:



Benefit	Status	Date Received	Expiration Date	Linked Appointments	Location	Action
No Record to Display						

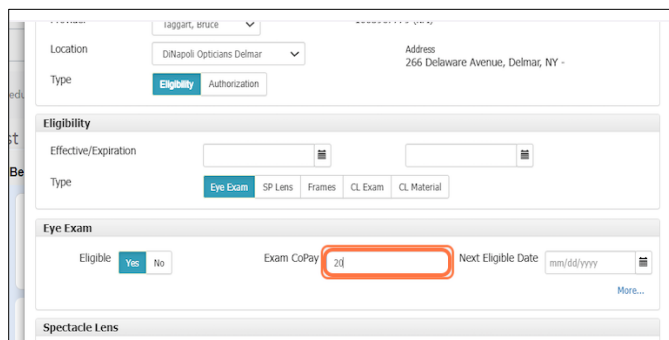
11. Select Enter Benefits to edit patient insurance:



Benefit	Status	Date Received	Expiration Date	Linked Appointments	Location	Action
No Record to Display						

12. Complete provider and all other benefit details

13. **Note:** Other than Medicare materials, all other materials are billed within Ciao! You can leave material copayment out if you so choose.



Eligible	Yes	No	Exam CoPay	Next Eligible Date
Eligible	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20	mm/dd/yyyy

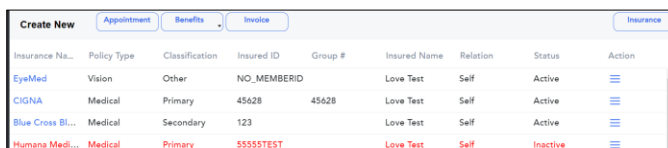
14. Click Save on the bottom right then select close located at the top of screen:



# ECLIPS GUIDE

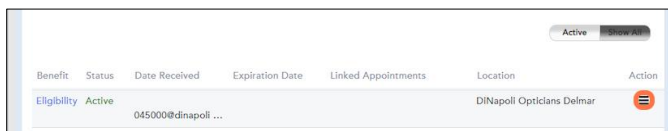
## Adding Insurance

15. From the Insurance Section select Benefits and appropriate plan from the dropdown list:



Insurance Na...	Policy Type	Classification	Insured ID	Group #	Insured Name	Relation	Status	Action
EyeMed	Vision	Other	NO_MEMBERID		Love Test	Self	Active	
CIGNA	Medical	Primary	45628	45628	Love Test	Self	Active	
Blue Cross BL...	Medical	Secondary	123		Love Test	Self	Active	
Humana Medi...	Medical	Primary	5555TEST		Love Test	Self	Inactive	

16. Next select the "Hamburger":



Benefit	Status	Date Received	Expiration Date	Linked Appointments	Location	Action
Eligibility	Active	045000@dinapoli...			DINapoli Opticians Delmar	

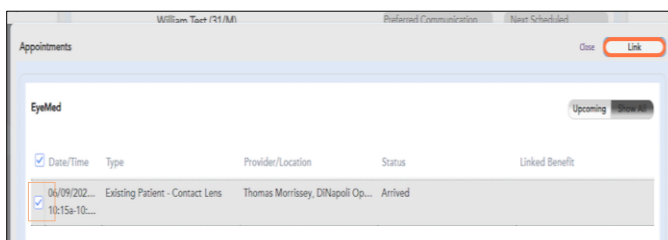
17. Select Link Appointment:



Benefit	Status	Date Received	Expiration Date	Linked Appointments	Location	Action
Eligibility	Active	045000@dinapoli...			DINapoli Opticians Delmar	Link Appointment Change Status Delete

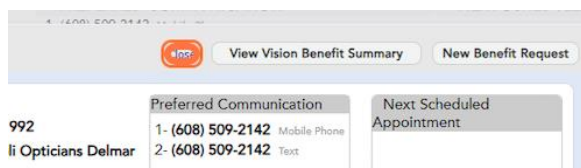
18. Choose the appropriate appointment to link to insurance

19. Select Link Appointment:



Date/Time	Type	Provider/Location	Status	Linked Benefit
04/09/2023... 10:15a-10:...	Existing Patient - Contact Lens	Thomas Morrissey, DINapoli Op...	Arrived	

20. Close the pop-up window:

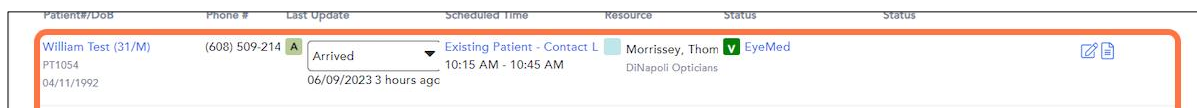


992  
li Opticians Delmar

Preferred Communication  
1- (608) 509-2142 Mobile Phone  
2- (608) 509-2142 Text

Next Scheduled Appointment

21. If linked correctly the Insurance tile will turn green:



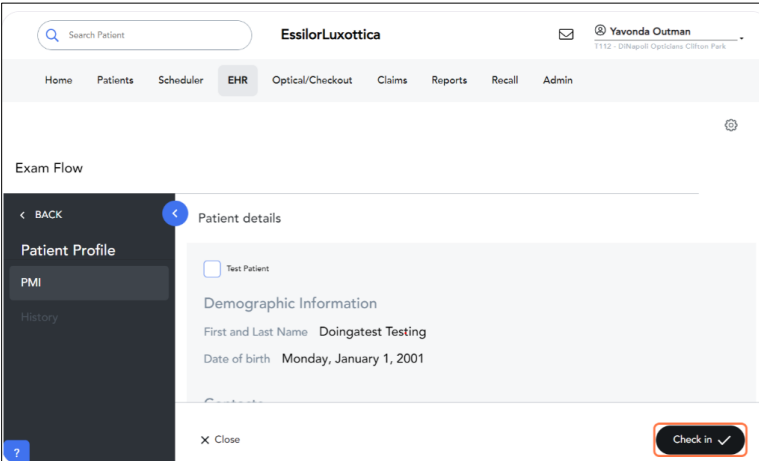
Patient#/DOB	Phone #	Last Update	Scheduled Time	Resource	Status	Status
William Test (31/M) PT1054 04/11/1992	(608) 509-214	Arrived 06/09/2023 3 hours ago	Existing Patient - Contact L 10:15 AM - 10:45 AM	Morrissey, Thom DINapoli Opticians	EyeMed	

1. Go EHR and select the patient.:



Time	Full Name	Status
02:00 PM	Cheryl Morris	ARRIVED
03:00 PM	Bradley Pearson	ARRIVED
03:45 PM	Doingatest Testing	ARRIVED
04:00 PM	Samy Maya	CONFIRMED
01:00 PM	Matthias Mueller	WAITING ROOM
Jun 21	Amy Cornell	INTERRUPTED

2. Confirm that you have the correct patient  
3. Click Check in:



Search Patient

EssilorLuxottica

Yavonda Outman

Home Patients Scheduler **EHR** Optical/Checkout Claims Reports Recall Admin

Exam Flow

< BACK Patient details

Patient Profile

PMI

History

Test Patient

Demographic Information

First and Last Name Doingatest Testing

Date of birth Monday, January 1, 2001

X Close

Check in ✓

4. Click Confirm on the bottom right of the page:

The screenshot shows the 'EssilorLuxottica' EHR interface. At the top, there is a search bar and a user profile for 'Yavonda Outman'. The navigation menu includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is selected. The main content area is titled 'Privacy Policy Documents' and shows a message: 'THERE ARE NOT DOCUMENTS TO BE SIGNED. YOU CAN PROCEED WITH THE VISIT.' A 'Confirm' button with a checkmark is highlighted in the bottom right corner.

5. Click on Add New Category:

The screenshot shows the 'EssilorLuxottica' EHR interface. At the top, there is a search bar and a user profile for 'Yavonda Outman'. The navigation menu includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is selected. The main content area is titled 'Exam Flow | Doingatest Testing' and shows a dropdown menu for 'NP EEX'. Below this, there is a 'Patient Profile' section with a 'Chief Complaint' field. The 'Add new category' link is highlighted in the bottom left corner.

6. Click Add New Category and Select a Chief complaint category.

**Note: Please select the most appropriate reason for the patient visit. To begin type at least three letters to auto populate the field. This is not a free type field. You must select one of the preselected categories. A complete list is found at the end of this guide.**

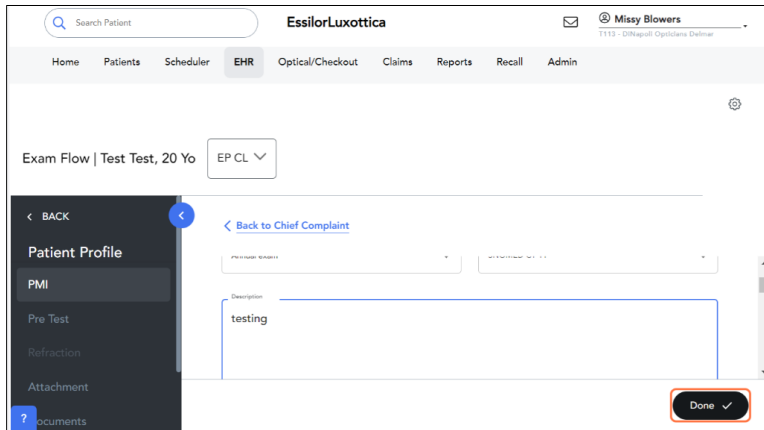
7. Select the appropriate category from the drop-down menu:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The user is logged in as Yavonda Outman. The 'Exam Flow | Doingatest Testing' section shows a drop-down menu with 'NP EEX' selected. A sidebar on the left contains 'Patient Profile', 'PMI', 'Pre Test', 'Refraction', 'Attachment', and 'Documents'. The main form area has a 'Category' drop-down menu with 'Annual exam' selected, highlighted by a red box. Other fields include 'SNOMED CT 11' and a 'Description' field. A 'Done' button is at the bottom right.

8. Input details of chief complaint and appropriate patient history:

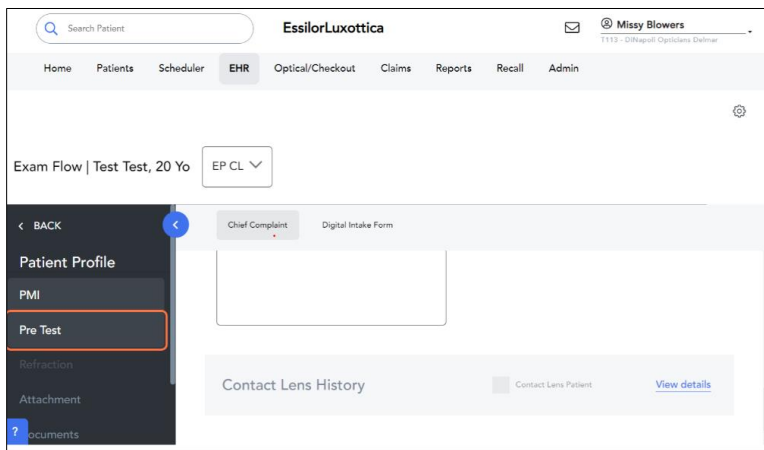
The screenshot shows the EssilorLuxottica EHR interface for a different patient, Missy Blowers. The 'Exam Flow | Test Test, 20 Yo' section shows a drop-down menu with 'EP CL' selected. The sidebar is the same as in the previous screenshot. The main form area has a 'Description' field with the text 'testing' entered, highlighted by a red box. A 'Done' button is at the bottom right.

### 9. Click Done:



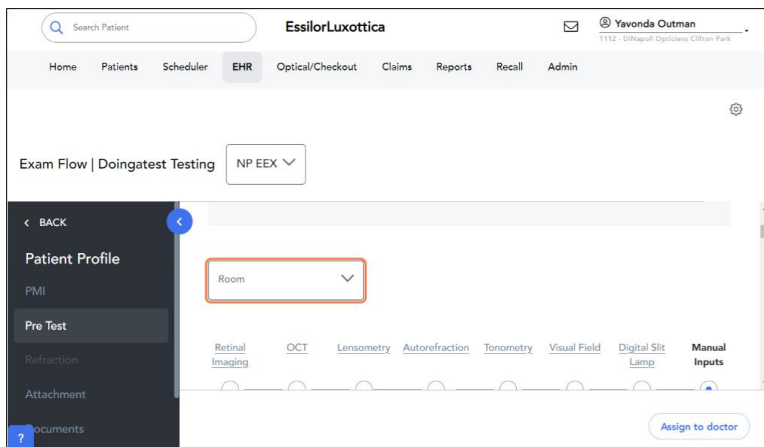
The screenshot shows the EssilorLuxottica EHR interface for patient Missy Blowers. The left sidebar contains a 'Patient Profile' menu with options: BACK, PMI, Pre Test, Refraction, Attachment, and ? documents. The main content area is titled 'Exam Flow | Test Test, 20 Yo' with a dropdown menu set to 'EP CL'. Below this, there is a 'Back to Chief Complaint' link and a text input field containing the word 'testing'. A red box highlights the 'Done' button with a checkmark icon in the bottom right corner.

### 10. Click on Pre -Test from the toolbar on the left:

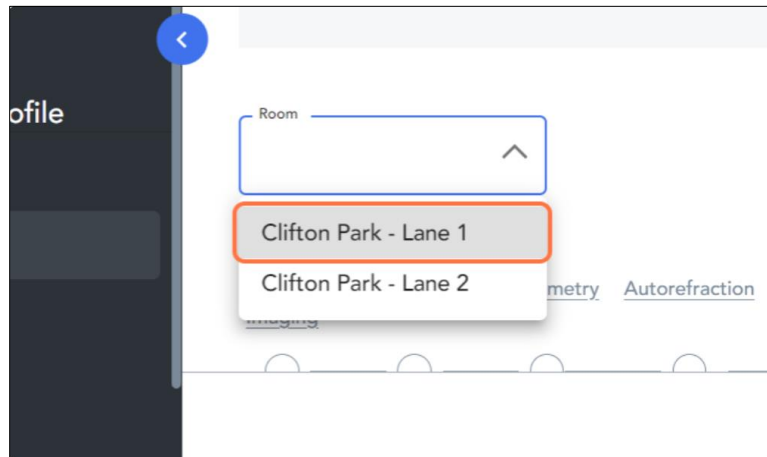


The screenshot shows the same EssilorLuxottica EHR interface. The 'Pre Test' option in the left sidebar is now highlighted with an orange box. The main content area shows 'Chief Complaint' and 'Digital Intake Form' tabs, with a large empty text box below them. At the bottom, there is a 'Contact Lens History' section with a 'View details' link.

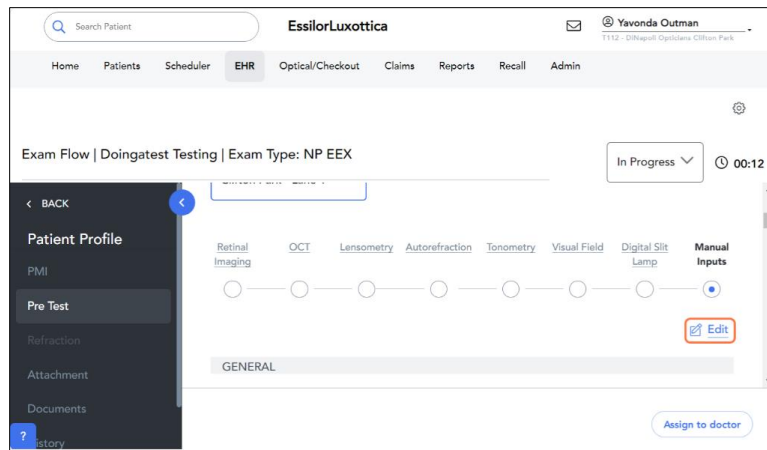
### 11. Select the Room the patient where patient will be located:



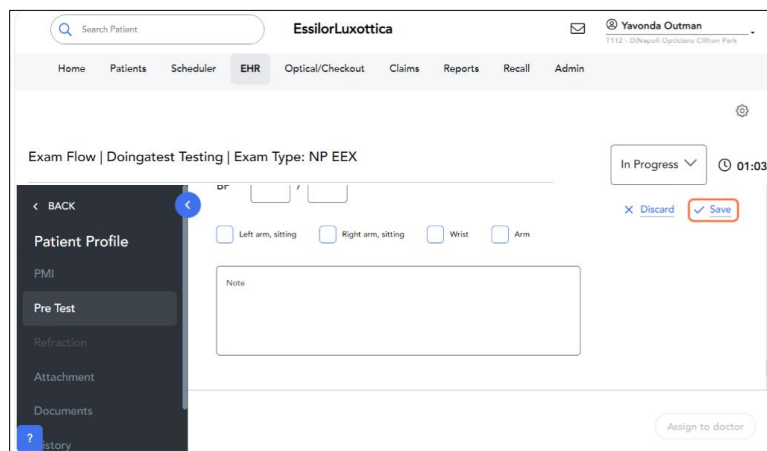
The screenshot shows the EssilorLuxottica EHR interface for patient Yavonda Outman. The left sidebar is the same as in the previous steps. The main content area is titled 'Exam Flow | Doingatest Testing' with a dropdown menu set to 'NP EEX'. A red box highlights a 'Room' dropdown menu. Below this, there is a horizontal timeline with various testing steps: Retinal Imaging, OCT, Lensometry, Autorefraction, Tonometry, Visual Field, Digital Slit Lamp, and Manual Inputs. An 'Assign to doctor' button is located at the bottom right.



12. Click Edit to manually input patient data for any of the pretest fields:



13. Once all fields are complete, Select Save:





14. Click on Assign to Doctor (**must** be completed to progress the exam):

The screenshot shows the ECLIPS Pretesting interface. At the top, there's a search bar and the clinic name 'EssilorLuxottica'. Below the navigation bar, the 'EHR' tab is selected. The main area displays 'Exam Flow | Doingatest Testing | Exam Type: NP EEX'. On the left, a sidebar menu includes 'Patient Profile', 'PMI', 'Pre Test' (highlighted), 'Refraction', 'Attachment', 'Documents', and 'History'. The main content area shows a 'Note' field and a red box around the 'Assign to doctor' button at the bottom right. A timer shows '01:07'.

15. **Always** select Connect to an optometrist in office:

The screenshot shows the ECLIPS Pretesting interface. The 'Pre-Testing Completed | Doingatest Testing | Exam Type: NP EEX' status is shown. A red box highlights the 'Connect to an optometrist in office' option, which is selected with a radio button. Below it, the 'Select Exam Room' section is visible. A 'Next' button is at the bottom right. A timer shows '01:12'.

16. Scroll down and Select the appropriate exam room:

The screenshot shows the ECLIPS Pretesting interface. The 'Select Exam Room' section is highlighted with a red box. It contains two radio button options: 'Lane 1' (selected) and 'Lane 2'. A 'Next' button is at the bottom right. A timer shows '01:19'.

### 17. Click Next:

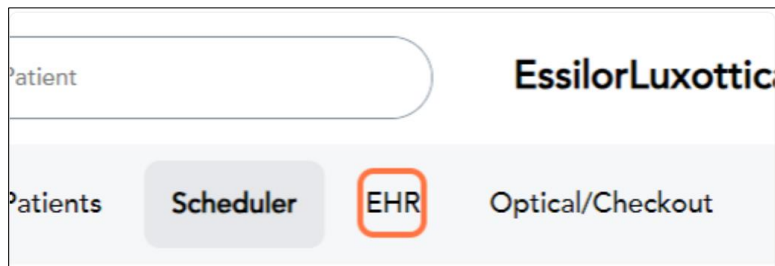
The screenshot shows the EssilorLuxottica EHR interface. At the top, there's a search bar and navigation tabs: Home, Patients, Scheduler, EHR (selected), Optical/Checkout, Claims, Reports, Recall, and Admin. The user is Yavonda Outman. The status bar at the top right shows 'In Progress' and a timer '01:22'. The main content area displays 'Pre-Testing Completed | Doingatest Testing | Exam Type: NP EEX'. Below this, there's a 'Select Exam Room' section with two options: 'Lane 1' (selected with a blue radio button) and 'Lane 2' (unselected with a white radio button). At the bottom left, there's a '< BACK' button. At the bottom right, there's a 'Next >' button highlighted with a red box.

### 18. To put the patient back in the waiting room, select the waiting room from the status bar at the top right of the page (optional):

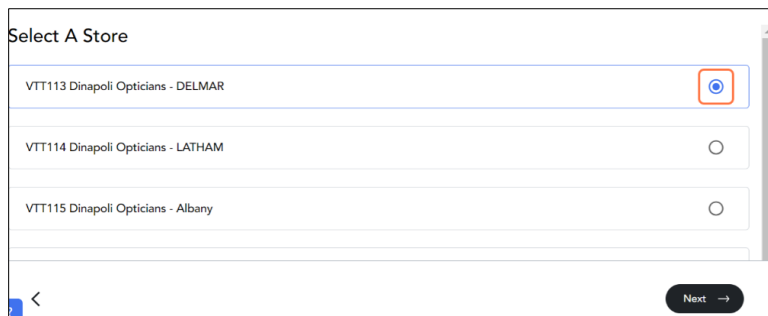
The screenshot shows the EssilorLuxottica EHR interface. The status bar at the top right shows 'In Progress' with a dropdown arrow. The main content area displays 'Exam Flow | Doingatest Testing | Exam Type: NP EEX'. On the left, there's a sidebar with a '< BACK' button and a list of options: Patient Profile, PMI, Pre Test (selected), Refraction, Attachment, Documents, and History. The main content area shows 'Pre Test' details: 'Local technician name Yavonda Outman' and 'Date and time Wednesday, June 21, 2023'. At the bottom right, there's a 'Collapse all' button.

The screenshot shows a close-up of the status bar. It displays 'In Progress' with an upward arrow. Below it, there's a dropdown menu with three options: 'In Progress', 'Waiting Room' (highlighted with a red box), and 'Stop'.

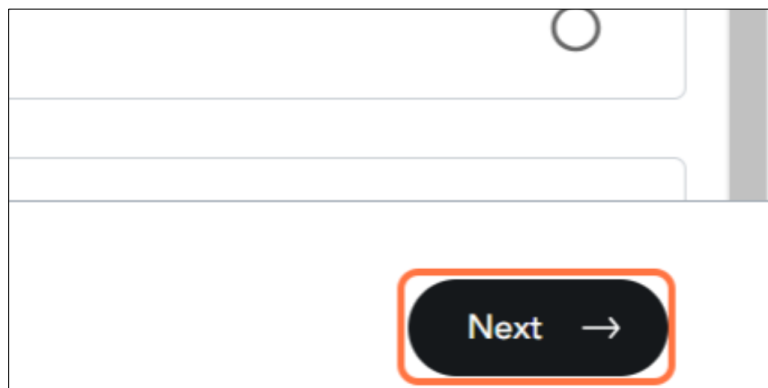
1. Click on EHR to select the patient:



2. Select the appropriate location:

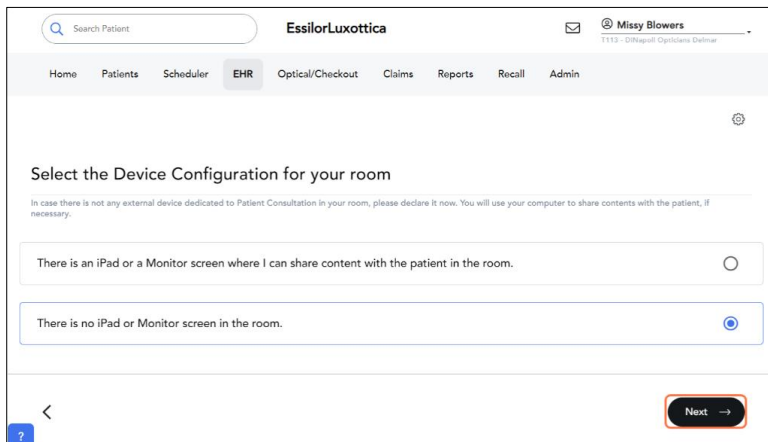


3. Click on Next on the bottom right of the page:



4. Select "there is not iPad or Monitor screen in the room"

5. Select Next:



Search Patient

EssilorLuxottica

Missy Blowers  
T112 - D1Nagott Opticians Delmar

Home Patients Scheduler **EHR** Optical/Checkout Claims Reports Recall Admin

Select the Device Configuration for your room

In case there is not any external device dedicated to Patient Consultation in your room, please declare it now. You will use your computer to share contents with the patient, if necessary.

There is an iPad or a Monitor screen where I can share content with the patient in the room. ☐

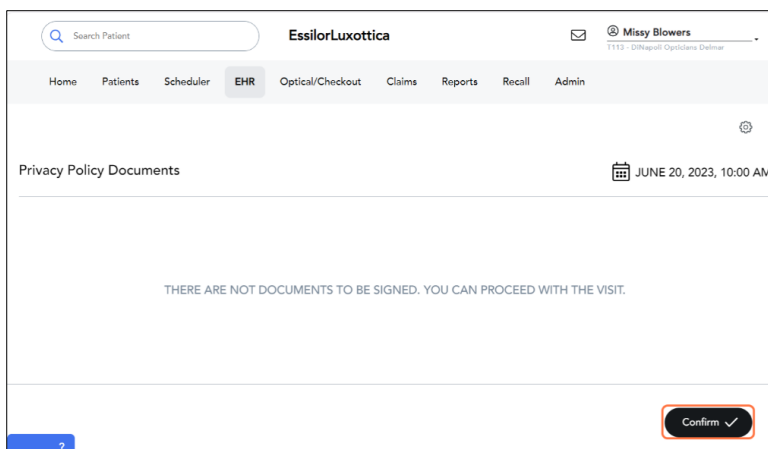
There is no iPad or Monitor screen in the room. ☒

< ? **Next** →

6. Select the appropriate patient from the EHR screen:

Appt Time	Name And Location	Exam Type	Sta
10:00 AM	Janice Fleischner	WALK_IN	PE
10:00 AM	Test Test	EP CL	AR
10:30 AM	Sharon Sgroi	EP E	CC
11:00 AM	Mercy Dugan-White	EP E	CC

7. Click Confirm:



Search Patient

EssilorLuxottica

Missy Blowers  
T112 - D1Nagott Opticians Delmar

Home Patients Scheduler **EHR** Optical/Checkout Claims Reports Recall Admin

Privacy Policy Documents

JUNE 20, 2023, 10:00 AM

THERE ARE NOT DOCUMENTS TO BE SIGNED. YOU CAN PROCEED WITH THE VISIT.

? **Confirm** ✓

8. Select PMI from the black toolbar to the right:
9. Review Digital Intake Form with patient (optional)  
**Note:** If tech has performed pretest skip to step #24

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes Home, Patients, Scheduler, EHR (selected), Optical/Checkout, Claims, Reports, Recall, and Admin. The patient name 'Missy Blowers' is displayed in the top right. The main content area is titled 'Exam Flow | Test Test, 20 Yo' with a dropdown menu set to 'EP CL'. A sidebar on the left contains a 'Patient Profile' section with options: PMI (selected), Pre Test, Refraction, Attachment, and Documents. The main form area is titled 'Chief Complaint' and 'Digital Intake Form'. It includes a language dropdown set to 'English', a 'Chief Complaint' section with an 'Add new category' link, and a 'Doctor's Notes' section with a text input field. A 'Zoom Out' button and a zoom control (+/-) are visible on the right side of the form.

10. Click Add New Category
11. Select a Chief complaint category

**Note:** Please select the most appropriate reason for the patient visit. To begin type at least three letters to auto populate the field. This is not a free type field. You must select one of the preselected categories. A complete listt can be found at the end of this guide.

The screenshot shows the EssilorLuxottica EHR interface, specifically the 'Chief Complaint' section. The top navigation bar is the same as the previous screenshot. The patient name 'Missy Blowers' is displayed. The main content area is titled 'Exam Flow | Test Test, 20 Yo' with a dropdown menu set to 'EP CL'. A sidebar on the left contains a 'Patient Profile' section with options: PMI (selected), Pre Test, Refraction, Attachment, and Documents. The main form area is titled 'Chief Complaint' and 'Digital Intake Form'. It includes a language dropdown set to 'English', a 'Chief Complaint' section with an 'Add new category' link, and a 'Doctor's Notes' section with a text input field. A 'Zoom Out' button and a zoom control (+/-) are visible on the right side of the form. The 'Category' dropdown is open, showing a search bar with 'pmi' entered, a 'Nothing found' message, and a 'Done' button at the bottom right.

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The user is logged in as 'Missy Blowers'. The main content area is titled 'Exam Flow | Test Test, 20 Yo' with a dropdown menu set to 'EP CL'. On the left, a sidebar menu lists 'Patient Profile', 'PMI', 'Pre Test', 'Refraction', 'Attachment', and 'Documents'. The main form has a 'Category' dropdown with 'Annual exam' selected and highlighted by a red box. Other fields include 'SNOMED CT 11' and a 'Done' button at the bottom right.

12. Type details of chief complaint:

The screenshot shows the same EssilorLuxottica EHR interface. The 'Category' dropdown is still set to 'Annual exam'. The 'Description' field is now active, and the word 'testing' has been entered. A red box highlights the 'Description' field. The 'Done' button is visible at the bottom right.

13. Click Done:

The screenshot shows the same EssilorLuxottica EHR interface. The 'Description' field contains the text 'testing'. The 'Done' button at the bottom right is now highlighted with a red box, indicating it should be clicked to save the entry.

14. Click on Pre -Test from the toolbar on the left:

The screenshot shows the EssilorLuxottica EHR interface. At the top, there's a search bar and navigation tabs: Home, Patients, Scheduler, EHR (selected), Optical/Checkout, Claims, Reports, Recall, and Admin. Below the tabs, the 'Exam Flow | Test Test, 20 Yo' is displayed with a dropdown menu set to 'EP CL'. On the left, a sidebar contains options: BACK, Patient Profile, PMI, Pre Test (highlighted with an orange box), Refraction, Attachment, and Documents. The main content area shows 'Chief Complaint' and 'Digital Intake Form' sections, with a 'Contact Lens History' section at the bottom.

15. Click Assign to Doctor on the lower right:

This screenshot shows the 'Pre Test' screen within the EssilorLuxottica EHR. The left sidebar is the same as in the previous screenshot. The main content area now displays 'Pretest Details' with the following information: 'Local technician name Missy Blowers' and 'Date and time Tuesday, June 20, 2023'. At the bottom right of the main content area, there is a button labeled 'Assign to doctor' which is highlighted with an orange box.

16. You should now see “Pre-Testing Completed” at the top of the page  
17. Next scroll down to select an Exam Room:

The screenshot displays the 'Pre-Testing Completed | Test Test, 20 Yo | Exam Type: EP CL' screen. Below this header, there is a section titled 'Select Exam Room'. It features a dropdown menu currently showing 'Lane 1'. A red error message below the dropdown states 'This is a mandatory field'. To the right of the dropdown is a blue circular button with a white plus sign, which is highlighted with an orange box. At the bottom of the screen, there are 'BACK' and 'Next' navigation buttons.

18. Click Next:

The screenshot shows the EssilorLuxottica EHR interface. At the top, there is a search bar and a patient dropdown menu showing 'Missy Blowers'. Below the navigation bar, the status 'Pre-Testing Completed | Test Test, 20 Yo | Exam Type: EP CL' is displayed. The main section is titled 'Select Exam Room' and contains a dropdown menu with 'Lane 1' selected. A red error message 'This is a mandatory field' is visible below the dropdown. At the bottom right, a 'Next' button is highlighted with a red box.

19. Click Assign to Doctor on the lower right:

The screenshot shows the EssilorLuxottica EHR interface. The 'Exam Flow | Test Test, 20 Yo' section is visible, with a dropdown menu showing 'EP CL'. A sidebar on the left contains a 'Patient Profile' section with options like 'PMI', 'Pre Test', 'Refraction', 'Attachment', and 'Documents'. The 'Pre Test' option is selected. The main content area shows 'Pretest Details' with fields for 'Local technician name' (Missy Blowers) and 'Date and time' (Tuesday, June 20, 2023). At the bottom right, an 'Assign to doctor' button is highlighted with a red box.

20. You should now see "Pre-Testing Completed" at the top of the page

21. Next scroll down to select Exam Room:

The screenshot shows the EssilorLuxottica EHR interface. At the top, there is a search bar and a patient dropdown menu showing 'Missy Blowers'. Below the navigation bar, the status 'Pre-Testing Completed | Test Test, 20 Yo | Exam Type: EP CL' is displayed. The main section is titled 'Select Exam Room' and contains a dropdown menu with 'Lane 1' selected. A red error message 'This is a mandatory field' is visible below the dropdown. At the bottom right, a 'Next' button is highlighted with a red box.



### 22. Click Next:

The screenshot shows the EssilorLuxottica EHR interface. At the top, there is a search bar and a user profile for Missy Blowers. The navigation menu includes Home, Patients, Scheduler, EHR, Optical/Checkout, Claims, Reports, Recall, and Admin. The main content area displays 'Pre-Testing Completed | Test Test, 20 Yo | Exam Type: EP CL'. Below this, there is a section titled 'Select Exam Room' with a dropdown menu showing 'Lane 1'. A red error message 'This is a mandatory field' is visible below the dropdown. At the bottom, there is a 'Next' button with a right arrow, which is highlighted with a red box. A 'BACK' button with a left arrow is also present.

### 23. Perform only the sections of the pre-test that are necessary to your clinic (it is not mandatory to fill them all in)

### 24. Select Refraction:

The screenshot shows the EssilorLuxottica EHR interface. At the top, there is a search bar and a user profile for Missy Blowers. The navigation menu includes Home, Patients, Scheduler, EHR, Optical/Checkout, Claims, Reports, Recall, and Admin. The main content area displays 'Today's Exam' with a dropdown menu, 'Review Results | Test Test, 20 Yo', 'EP CL' with a dropdown menu, 'In Progress' with a dropdown menu, and a timer '00:04'. Below this, there is a section titled 'Exam Flow' with a sidebar. The sidebar includes 'Summary', 'PMI', 'Pre-Test', and 'Refraction'. The 'Refraction' section is highlighted with a red box. The main content area shows 'Exam Date' with two entries: 'Tuesday, June 20, 2023' and 'Monday, June 12, 2023', each with a 'View details' link. At the bottom, there is a button 'End exam without rx' with a checkmark.

### 25. Click Edit:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is selected. The patient name 'Missy Blowers' is displayed in the top right. The main content area shows a 'CLASSIC EXAM' for 'DELMAR - Lane 1'. The 'Refraction' section is highlighted in the left sidebar. The 'Edit' button is highlighted with a red box. The 'End exam without rx' button is visible at the bottom right.

### 26. Enter in refractive data in the appropriate section:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is selected. The patient name 'Missy Blowers' is displayed in the top right. The main content area shows a 'CLASSIC EXAM' for 'DELMAR - Lane 1'. The 'Refraction' section is highlighted in the left sidebar. The 'OD' button is highlighted with a red box. The 'End exam without rx' button is visible at the bottom right.

### 27. Click Save:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes Home, Patients, Scheduler, EHR, Optical/Checkout, Claims, Reports, Recall, and Admin. The EHR tab is active. Below the navigation bar, there are filters for 'Today's Exam', 'Review Results | Test Test, 20 Yo', 'EP CL', and 'In Progress' with a timer at 01:05. The main content area is titled 'CLASSIC EXAM' and shows a room selection dropdown set to 'DELMAR - Lane 1'. The 'Room selection & Stepper' toggle is turned on. The 'Refraction' section is active, showing a table with columns for OD, OS, and a 'Save' button highlighted with a red box. There are also buttons for 'Discard', 'End exam without rx', and 'Edit'.

### 28. Click Contact Lenses and fill out appropriate information if needed

### 29. Click on Ocular Health:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar is the same as in the previous screenshot. The EHR tab is active. Below the navigation bar, there are filters for 'Today's Exam', 'Review Results | Test Test, 20 Yo', 'EP CL', and 'In Progress' with a timer at 01:16. The main content area is titled 'CLASSIC EXAM' and shows a room selection dropdown set to 'DELMAR - Lane 1'. The 'Room selection & Stepper' toggle is turned on. The 'Ocular Health' button in the left sidebar is highlighted with a red box. The 'Refraction' section is also visible, showing a table with columns for OD, OS, and a 'Save' button.

### 30. **Tip:** You can click on Condition and Populate "Normal OU" this will automatically set all values to Normal. If an abnormality presents change only that value:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar is the same as in the previous screenshots. The EHR tab is active. Below the navigation bar, there are filters for 'Today's Exam', 'Review Results | Test Test, 20 Yo', 'EP CL', and 'In Progress' with a timer at 01:26. The main content area is titled 'CLASSIC EXAM' and shows a room selection dropdown set to 'DELMAR - Lane 1'. The 'Room selection & Stepper' toggle is turned on. The 'Ocular Health' section is active, and a dropdown menu is open, showing options: 'NORMAL OU', 'NORMAL OD', 'NORMAL OS', 'CLEAR ALL', 'DM, NO DR, NORMAL OU', and 'NORMAL A/S'. The 'NORMAL OU' option is highlighted with a red box. There are buttons for 'Discard', 'Save', and 'End exam without rx'.

31. Click Save

32. Click Assessment & Plan from the black toolbar on the left:

The screenshot shows the TeamVision EHR interface for patient Missy Blowers. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR' (selected), 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The main content area displays 'Today's Exam' with a dropdown, 'Review Results | Test Test, 20 Yo', 'EP CL' with a dropdown, and 'In Progress' with a dropdown and a clock icon showing 01:34. The left sidebar is a black toolbar with options: 'Auxiliary', 'Contact Lenses', 'Ocular Health', 'Other Test', 'Assessment & Plan' (highlighted with an orange box), and 'Consultation'. The main content area shows 'Room' as 'DELMAR - Lane 1' and 'Ocular Health' with a 'Condition' dropdown set to 'NORMAL OU'. An 'Edit' link is visible next to the condition dropdown. At the bottom right, there is a button 'End exam without rx'.

33. Input at least three character of the Diagnosis Code(s) to start the search (common codes can be found at the end of this guide)

**Note:** You cannot free type in this section

The screenshot shows the TeamVision EHR interface for patient Missy Blowers, with the 'Assessment & Plan' section selected in the left sidebar. The main content area has tabs for 'Assessment & Plan' (selected), 'Procedures & Special Tests', and 'Goals'. Under the 'Assessment & Plan' tab, there is a 'Diagnosis' section with a 'Favorites' checkbox. The 'Diagnosis' field contains the text 'h52.14' and is highlighted with a red box. Below the field, a message says 'type at least 3 chars to start search'. To the right of the 'Diagnosis' field is a 'Next Eye Exam' section with a 'Select time lapse' dropdown set to '12 months'. Further right is a 'Recommendations' section with a 'Recommendations' field. At the bottom right, there is a button 'End exam without rx'.

34. Select the appropriate diagnosis codes:

Search Patient

EssilorLuxottica

Missy Blowers  
T113 - D'Napoli Opticians Delmar

Home Patients Scheduler **EHR** Optical/Checkout Claims Reports Recall Admin

Today's Exam | Review Results | Test Test, 20 Yo EP CL | In Progress 01:57

Auxiliary

- Contact Lenses
- Ocular Health
- Other Test
- Assessment & Plan**
- Consultation

Assessment & Plan

Diagnosis ☐ Favorites

ICD10 code  
H52.13

H52.13 - Myopia, bilateral

Next Eye Exam  
Select time type  
12 months

Recommendations

End exam without rx

35. Click View Details on each diagnosis:

Search Patient

EssilorLuxottica

Missy Blowers  
T113 - D'Napoli Opticians Delmar

Home Patients Scheduler **EHR** Optical/Checkout Claims Reports Recall Admin

Today's Exam | Review Results | Test Test, 20 Yo EP CL | In Progress 02:06

Auxiliary

- Contact Lenses
- Ocular Health
- Other Test
- Assessment & Plan**
- Consultation

Assessment & Plan

Despite of all the diagnosis you add, only the first 12 will be taken into consideration for the invoice. Please remember only one diagnosis can be set as primary.

☐ H52.13 - Myopia, bilateral

Favorite Primary **View details**

Coding & workflow

End exam without rx

36. Type out the assessment and plan for each diagnosis:

Search Patient

EssilorLuxottica

Missy Blowers  
T113 - D'Napoli Opticians Delmar

Home Patients Scheduler **EHR** Optical/Checkout Claims Reports Recall Admin

Today's Exam | Review Results | Test Test, 20 Yo EP CL | In Progress 02:17

Auxiliary

- Contact Lenses
- Ocular Health
- Other Test
- Assessment & Plan**
- Consultation

Assessment & Plan

Assessment

Plan  
testing

End exam without rx

### 37. Select Coding and Workflow:

The screenshot shows the EssilorLuxottica EHR interface for patient Missy Blowers. The 'Assessment & Plan' section is active, displaying a table with 'Diagnosed on' and 'Resolved on' dates. A red box highlights the 'Coding & workflow' button in the bottom right corner of the main content area.

### 38. Click Populate Coding

### 39. Review codes (to add or edit codes use the buttons on the right)

**Note:** Eclips does not evaluate risk level and accuracy

### 40. Once review is complete. Click Ready for Billing:

The screenshot shows the 'Coding' window with a table of codes. The 'Ready for Billing' button is highlighted with a red box. The table contains the following data:

Code	Qty	Dx1	Dx2	Dx3	Dx4	Insurance	Modifier(s)
92015	1						
92310	1						
92014	1						

### 41. Confirm Action:

The screenshot shows the 'Coding' window with a 'Confirm action' dialog box overlaid. The dialog box contains the following text:

**Confirm action**

Ready for Billing will send populated codes to generate an invoice. This action is permanent and no additional code changes can be made.

Buttons: Cancel, Confirm

42. Click the "X" to close the pop-up box

43. Select Consultation from the Black tool bar on the left:

The screenshot shows the TeamVision ECLIPS interface. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is active. Below the navigation bar, there's a search bar and a patient selection dropdown showing 'Missy Blowers'. The main content area has a 'Today's Exam' dropdown, a 'Review Results | Doina Test, 69 Yo' section, and an 'EP E' dropdown. A 'Coding & workflow' button is visible. The left sidebar is open, showing a list of examination steps: 'Contact Lenses', 'Ocular Health', 'Other Test', 'Assessment & Plan', 'Consultation' (highlighted with a red box), 'Orders', and a help icon. The 'Consultation' step is selected, and the main content area displays a form with 'Diagnosed on' and 'Resolved on' date pickers, and a series of radio buttons for 'New', 'Stable', 'Improved', 'Worse', 'Resolved', and 'Inactive'. There are also radio buttons for 'OD', 'OS', and 'BOTH'.

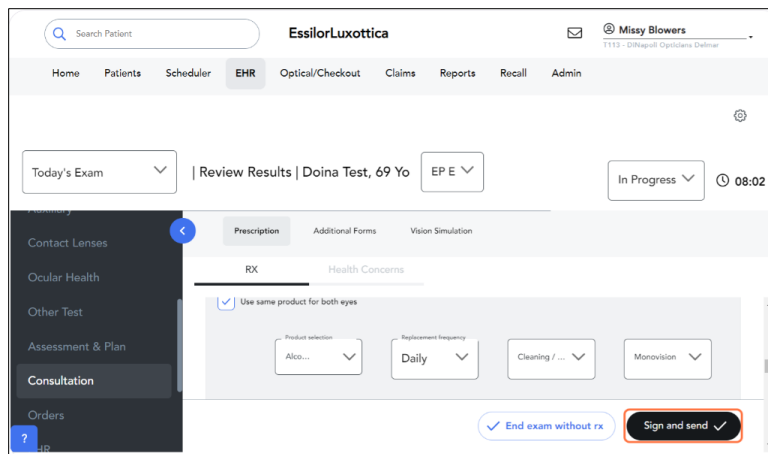
44. Input the appropriate prescription information for contacts lens and/or Glasses:

The screenshot shows the TeamVision ECLIPS interface with the 'Prescription' step selected in the left sidebar. The main content area displays a form with 'Prescription', 'Additional Forms', and 'Vision Simulation' tabs. The 'Prescription' tab is active, showing a 'RX' section with a 'Use same product for both eyes' checkbox. Below this, there are four dropdown menus: 'Product selection' (showing 'Alco...'), 'Replacement frequency' (showing 'Daily'), 'Cleaning / ...', and 'Monovision'. The 'End exam without rx' button is highlighted with a red box.

45. Click Preview:

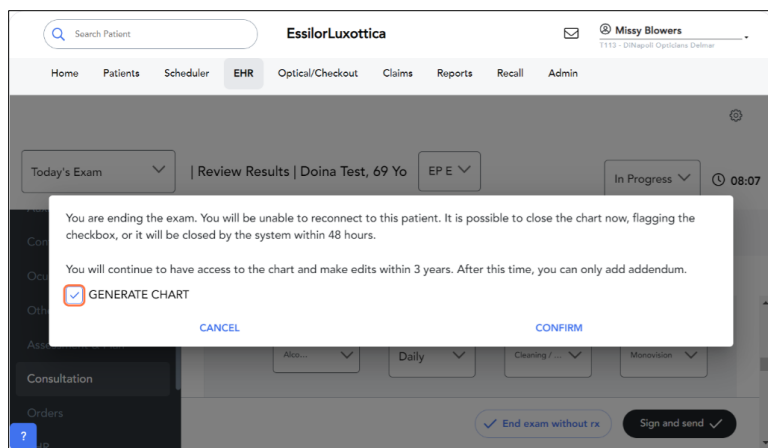
The screenshot shows the TeamVision ECLIPS interface with the 'Preview' button highlighted with a red box. The main content area displays the same 'Prescription' form as in the previous screenshot, but with the 'Replacement frequency' dropdown set to 'Daily'. The 'End exam without rx' button is also visible.

### 46. Select Sign and Send:



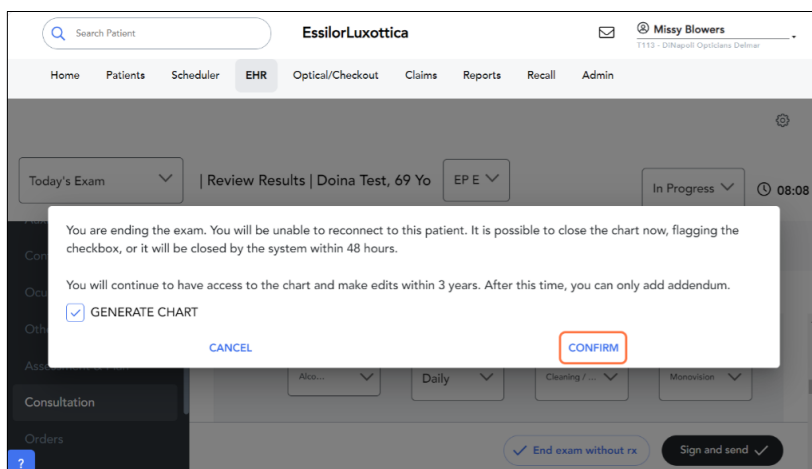
The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes Home, Patients, Scheduler, EHR, Optical/Checkout, Claims, Reports, Recall, and Admin. The user is Missy Blowers, T113 - DINApoll Opticians Delmar. The main area displays 'Today's Exam' with a dropdown menu, 'Review Results | Doina Test, 69 Yo', and 'EP E' with a dropdown menu. The 'In Progress' status is shown with a clock icon at 08:02. The left sidebar lists various examination categories: Contact Lenses, Ocular Health, Other Test, Assessment & Plan, Consultation, and Orders. The 'Consultation' category is selected. The main content area shows the 'Prescription' tab with a checkbox for 'Use same product for both eyes' and several dropdown menus for product selection, replacement frequency, cleaning, and monovision. At the bottom right, the 'Sign and send' button is highlighted with a red box.

### 47. Select Generate Chart:



The screenshot shows the same EssilorLuxottica EHR interface as in step 46. A confirmation dialog box is displayed in the center of the screen. The dialog box contains the following text: 'You are ending the exam. You will be unable to reconnect to this patient. It is possible to close the chart now, flagging the checkbox, or it will be closed by the system within 48 hours. You will continue to have access to the chart and make edits within 3 years. After this time, you can only add addendum.' Below the text, there is a checkbox labeled 'GENERATE CHART' which is checked. At the bottom of the dialog box, there are two buttons: 'CANCEL' and 'CONFIRM'. The 'CONFIRM' button is highlighted with a red box.

### 48. Select confirm:



The screenshot shows the same EssilorLuxottica EHR interface as in step 47. The confirmation dialog box is still present, and the 'CONFIRM' button at the bottom right of the dialog box is highlighted with a red box.



### 49. Select consultation:

The screenshot shows the EssilorLuxottica EHR interface. The top navigation bar includes 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is active. Below the navigation bar, there's a search bar and a patient selection dropdown. The main content area is divided into three tabs: 'Prescription', 'Additional Forms', and 'Vision Simulation'. The 'Prescription' tab is selected, showing a 'Use same product for both eyes' checkbox and four dropdown menus for 'Product selection', 'Replacement frequency', 'Cleaning / ...', and 'Monovision'. The 'Close' button is highlighted with a red box.

### 50. Print Rx by going to documents

### 51. Select the appropriate prescriptions and open the document

### 52. Select Print

#### IMPORTANT

The following items **MUST** be completed before the patient is brought out to optical or check out.

- ✓ All diagnosis codes are entered into the system
- ✓ All billing codes are entered and checked as "Ready for Billing"
- ✓ Rx has been Signed and Sent
- ✓ Chart Closed or Generate Chart
- ✓ RX Printed

# ECLIPS GUIDE

## Routine Vision Invoicing

1. Access the patient either by selecting Invoice or Optical Checkout tab
2. Select the patient and then select Add Invoice
3. Upon completion of the exam, the doctor will send over procedural and diagnosis codes
4. If they do not automatically come over, or if you need to add services, you can manually enter them by using the pull-down bars and the professional services button on the bottom left side of the pop-up window
5. If you need to delete a service, select the "hamburger" on the right:

Item ID	Qty	ICD Code(s)	Procedure/Product Code	Insurance Staff Member	Usual/Cost Fee	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc	Co-Pay	Pt. Res.	Total Pt. Tax	Pt. Balance
92014	1	92014	92014: EST Com	Equipped Vision-On	\$140.00		\$0.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00	\$0.00

6. For all vision and non-insurance patients, select the discount button to zero out the invoice:

Qty	Procedure	Code	Fee	Adjust.	\$ Disc.	Co-Pay	Ins. Res.	Pt. Res.
1	92014-EST Comprehensive	92014	\$140.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00

**Details**

Reason: Manager's Request    Discount Code:

Method: \$ Amount    % Original    % Current    \$ 140

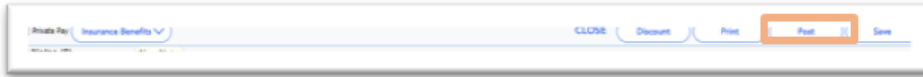
Net Discount:

7. Once the discount window appears, select the item(s) you want to discount and by how much (use either the dollar amount or percentage)
8. Select save when finished

# ECLIPS GUIDE

## Routine Vision Invoicing

8. Post to account and proceed to Process/Bill in Ciao!
9. When prompted to recall select Yes:



10. For additional questions, refer to your Insurance Binder

# ECLIPS GUIDE

## Medical Invoicing

1. Access the patient either by selecting Invoice or Optical Checkout tab
2. Select the patient and then select Add Invoice
3. Upon completion of the exam, the doctor will send over procedural and diagnosis codes
4. If they do not automatically come over, or if you need to add services, you can manually enter them by using the pull-down bars and the professional services button on the bottom left side of the pop-up window
5. If you need to delete a service, select the "hamburger" on the right:

Love Test (37/F)  
IN25963  
Location: T047 - Triangle Visions - Gastonia  
Date of Service: 06/11/2023

ICD Codes - Click letter button to toggle on/off for all line items. Select the drop down to add additional ICD codes.

Item ID Qty	ICD Code(s) Modifier(s)	Procedure/Product Code Provider	Insurance Staff Member	Usual/Cust Fee	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc	Co-Pay	Pt. Res.	Total Pt. Tax	Pt. Balance Ins. Balance
1		92014 92014- EST Com Toomey, Sara	EyeMed (Vision-Oth)	\$140.00		\$0.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00	\$0.00

### 6. For all Medical Insurance Plans, Eclips will auto calculate the insurance responsibility:

**MEDICAL PLANS**

IN1147  
Location: T047 - Triangle Visions - Gastonia  
Date of Service: 02/08/2023  
Posted Date: 02/08/2023 03:21:55 PM EST

ICD Codes - Click letter button to toggle on/off for all line items. Select the drop down to add additional ICD codes.

Item ID Qty	ICD Code(s) Modifier(s)	Procedure/Product Code Provider	Insurance Staff Member	Usual/Cust Fee	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc	Co-Pay	Pt. Res.	Total Pt. Tax	Pt. Balance Ins. Balance
1	A	99214 - 99214- E&M Level 4 Est Smith	Blue Cross Blue Shield Of NC	\$200.00	\$74.29	\$34.29 46.16%	\$125.71	\$0.00	\$40.00	\$0.00	\$40.00	\$0.00
1	A	92134 - 92134 Retina O CT Smith	Blue Cross Blue Shield Of NC	\$120.00	\$39.59	\$39.59 100%	\$80.41	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>				\$320.00	\$113.88	\$73.88	\$206.12	\$0.00	\$40.00	\$0.00	\$40.00	\$0.00

**Account Balance**  
\$0.00  
Unappl. Prets \$0.00  
Pt. Balance \$0.00  
Ins. Balance \$73.88

**PT BAL should always be \$0 (apply payments). Only BAL left is Ins. Balance.**

**= PLAN PAYS in Ciao! Optical – take note of it. This doesn't print on an invoice!**

**=Patient Resp or Copays should be entered into COPAY column Ciao! Optical**

**VERY IMPORTANT: In Ciao! Optical - DO NOT reduce Plan Pays by Copay Amount. We do this for Routine but not for Medical, this is already covered when you apply it in Eclips.**

7. Record Patient Copay by selecting Pay and complete Payment details
8. When prompted about recall, select YES:

Payment

Selected Invoices

Invoice #	Amount	Paid	Pt. Balance	Payment
IN23834	\$140.00	\$0.00	\$140.00	\$20.00
Total Payment				\$20.00

Payment Details

Cash Credit Card **Debit Card** Check Unapplied Payments Other

Amount \$20.00

Type Visa

Card Last 4 Digits 1234

Note

9. Post to account and proceed to process in Ciao!






Private Pay Insurance Benefits

Notes (0) New Note


CLOSE Discount Print **Post** Save

10. If you have additional questions: please refer to your Insurance Binder

**Note:** All Patients regardless of insurance type (Routine, Medical, Non-Insurance) must be checked out in eclips. Additionally, all invoices must be posted by the end of the day:

(704) 923-6122		Checked Out 06/09/2023 2 days ago
 (704) 263-1777		Checked Out 06/09/2023 2 days ago
(704) 460-1924		Checked Out 06/09/2023 1 day ago
7/F) (704) 813-5944		Checked Out 06/09/2023 2 days ago

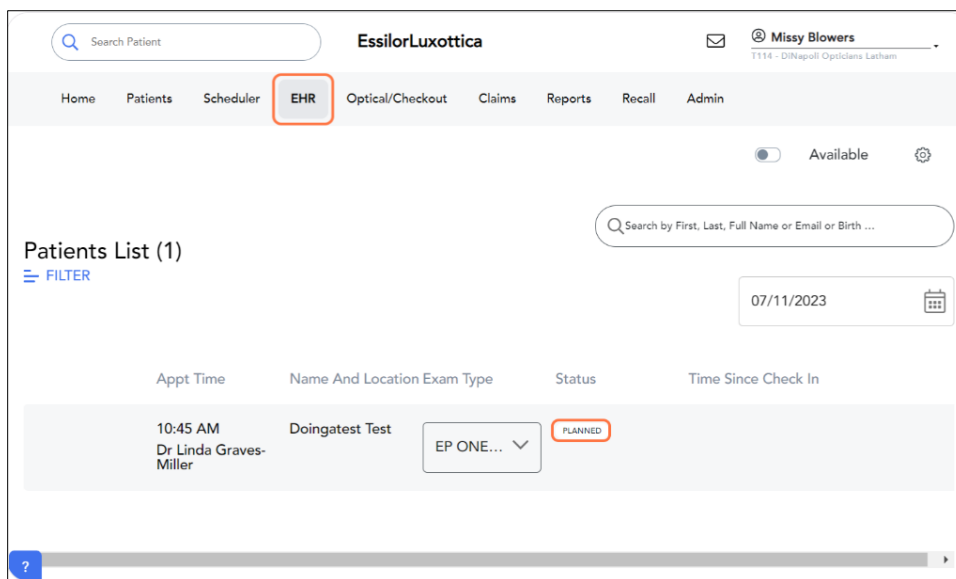
☐ All Open Invoices
 

From 06/09/2023
 

Type	Patient
Posted	Kendrick, Leslie
Posted	Devenny, Larry
Posted	Owensby, Jason P
Posted	Thomas, Harvey
Posted	Archibald, Ian
Posted	Seagle, Kathryn

11. Schedule the Patient for their Next Eye Exam by going back to the Scheduler and selecting checkout and following the prompts

1. Pre-charting refers to attaching previous paper charts to an exam, inserting known historical information such as Rx's and contact lens histories
2. This feature allows you to navigate to a planned exam schedules on a future date
3. To use this function simply click on the exam and select Planned:



### Note:

- ✓ The user must select the "Assign to me" button prior to making any changes to the patient's chart. The app will render a warning message if the chart is already assigned to another user
- ✓ For exams scheduled in the future, the "Start Exam" button will NOT display after selecting "Assign to me"
- ✓ Techs and ODs should collaborate and align on what components of the chart should be completed as a part of the new pre-charting process

### Complete these actions in Eclips to test your knowledge:

- ☐ Create an Appointment in schedular
- ☐ Move/Cancel an appointment
- ☐ Fill out a Digital Intake form
- ☐ Pre-chart a patient
- ☐ Add Medical Insurance to a test patient
- ☐ Add Routine Vision Insurance to a test patient
- ☐ Technicians: Pretest a test patient
- ☐ Doctors: Perform a routine exam
- ☐ Doctors: Perform a medical exam
- ☐ PCC: Invoice Private pay test patient
- ☐ PCC: Invoice Routine insurance test patient
- ☐ PCC: Invoice Medical insurance test patient
- ☐ PCC: Schedule pt for NEE also Checkout



# ECLIPS GUIDE

## Chief Complaint List

Allergies	Here for special testing as ordered
Amblyopia	High risk medication evaluation
Annual exam	Imaging review-Duplex carotid scan
Blurred vision	Imaging review-MRI/CT
Blurred vision all distances	Imaging Review-X-Ray
Blurred vision at night	Interested in contact lenses
Blurred Vision Distance	Interested in refractive surgery
Blurred Vision Intermediate	Itching
Blurred Vision Near	Lab review
Burning	Lid crusty
Cataract evaluation	Lid drooping
Color vision	Lid lump or bump
Contact lens dry	Lid puffy or swollen
Contact lens dry/uncomfortable at end of day	Lid stuck together
Contact lens evaluation	Lid twitching
Contact lens uncomfortable	Light sensitivity
Contact lens vision fluctuates	Loss of side vision
Cornea evaluation	Macula exam
Coughing	Nausea with vomiting
Diabetic eye evaluation	Nausea without vomiting
Discharge	Needs CL Rx
Discomfort/Sore	Needs Glasses and CL Rx
Distorted vision	Needs Rx refill for medication
Dizziness	Needs spectacle Rx
Doctor Recommended Return	Neuro ophthalmological eval
Double vision	Ocular Fatigue
Double vision diagonal	Other
Double vision-horizontal	Plaquenil testing
Double vision-vertical	Pseudophakic evaluation
Dry eye	Red eye
Dry eye evaluation	Retinal evaluation
Eye Pain	Retinal-vitreous evaluation
Fever	Routine exam
Flashes	Rx request
Floaters	Sandy or Gritty feeling
Foreign body	Shortness of breath
General Eye Exam	Sneezing
Glare	Sudden vision loss
Glaucoma evaluation	Surgical procedure
Glaucoma suspect evaluation	Testing review
Halos	Transient vision loss
Head tilt	Vision Loss
Headaches	Watery eyes

# ECLIPS GUIDE

## ICD-10 Codes

VISIT TYPE (NEW/EST)	PROCEDURES	REFRACTIVE (1 = OD, 2 = OS, 3 = OU)	
<b>92004/92014</b> COMPREHENSIVE EXAM	<b>65205</b> Removal FB Conj Superficial	H52.31	Anisometropia
<b>99202/99212</b> MOV E&M LEVEL 2	<b>65210</b> Removal FB Conj Embedded	H52.22 (1, 2, 3)	Astigmatism, Regular
<b>99203/99213</b> MOV E&M LEVEL 3	<b>65222</b> Removal FB Corn w Slit Lamp	H52.21 (1, 2, 3)	Astigmatism, Irregular
<b>99204/99214</b> MOV E&M LEVEL 4	<b>68801</b> Punctal Dil w/wo Irrigation	H52.0 (1, 2, 3)	Hypermetropia
<b>99205/99215</b> MOV E&M LEVEL 5	<b>68761</b> Punctal Plug Insertion	H52.1 (1, 2, 3)	Myopia
<b>TESTING</b>	<b>67820</b> Lash Epilation	H52.4	Presbyopia
<b>92020</b> Gonioscopy	<b>VISIT TYPE</b>	H53.02 (1, 2, 3)	Amblyopia, Refractive
<b>76514</b> Pachymetry	<b>92015</b> REFRACTION	H53.03 (1, 2, 3)	Amblyopia, Strabismic
<b>92132</b> OCT-Ant Seg	<b>S9986-1</b> OPTOS	<b>INJURY/TRAUMA</b> (1 = OD, 2 = OS, 3 = OU)  A=Initial Encounter, D=Subsequent Encounter, S=Sequela	
<b>92133</b> OCT-Nerve	<b>SELF PAY EXAM (w OPTOS)</b>	S05.0 (1, 2) X (A, D, S)	Abrasion - Cornea/Conj
<b>92134</b> OCT-Retina	<b>92310-1</b> ANNUAL CL EVAL	T15.1 (1, 2) X (A, D, S)	Foreign Body - Conjunctival
<b>92081</b> HVF Screen/DMV	<b>92310-2</b> SCL PREMIUM EVAL	T15.0 (1, 2) X (A, D, S)	Foreign Body - Cornea
<b>92083</b> HVF Extensive	<b>92310-3</b> NEW FIT/ADV REFIT	T26.6 (1, 2) X (A, D, S)	Chemical Burn - Cornea/Conj
<b>92250</b> Fundus Photography	<b>92310-4</b> ADVANCED NEW FIT	H16.14 (1, 2, 3)	Keratitis
<b>92285</b> External Photography	SEE CL CODE DOCUMENT FOR ADDTL CODES		
<b>92025</b> Corneal Topography	<b>66984-55</b> POST-OP		
	<b>99499</b> RX/CL CHECK		
	<b>99024</b> NC POST-OP F/U		

# ECLIPS GUIDE

## ICD-10 Codes

<b>DIABETES - TYPE I</b> (1 = OD, 2 = OS, 3 = OU)		<b>DIABETES - TYPE II</b> (1 = OD, 2 = OS, 3 = OU)	
E10.9	No Retinopathy	E11.9	No Retinopathy
E10.321 (1, 2, 3)	Mild NPDR w DME	E11.321 (1, 2, 3)	Mild NPDR w DME
E10.329 (1, 2, 3)	Mild NPDR wo DME	E11.329 (1, 2, 3)	Mild NPDR wo DME
E10.331 (1, 2, 3)	Mod NPDR w DME	E11.331 (1, 2, 3)	Mod NPDR w DME
E10.339 (1, 2, 3)	Mod NPDR wo DME	E11.339 (1, 2, 3)	Mod NPDR wo DME
E10.341 (1, 2, 3)	Sev NPDR w DME	E11.341 (1, 2, 3)	Sev NPDR w DME
E10.349 (1, 2, 3)	Sev NPDR wo DME	E11.349 (1, 2, 3)	Sev NPDR wo DME
E10.351 (1, 2, 3)	PDR w DME	E11.351 (1, 2, 3)	PDR w DME
E10.359 (1, 2, 3)	PDR wo DME	E11.359 (1, 2, 3)	PDR wo DME
E10.355 (1, 2, 3)	PDR - Stable	E11.355 (1, 2, 3)	PDR - Stable

<b>VITREOUS/RETINA</b> (1 = OD, 2 = OS, 3 = OU)							
H43.81 (1, 2, 3)	Vitreous Degeneration/PVD	H34.23 (1, 2, 3)	BRAO	H34.21 (1, 2, 3)	Hollenhorst Plaque	H33.01 (1, 2, 3)	RD - Single Break
H43.39 (1, 2, 3)	Vitreous Opacities/Floaters	H34.83 (1, 2, 3)	BRVO	H33.31 (1, 2, 3)	Horseshoe Tear	H33.03 (1, 2, 3)	RD - Giant Tear
H43.1 (1, 2, 3)	Vitreous Hemorrhage	H34.1 (1, 2, 3)	CRAO	H35.03 (1, 2, 3)	Hypertensive Retinopathy	H33.05 (1, 2, 3)	RD - Total
H43.82 (1, 2, 3)	Vitreomacular Adhesion	H34.81 (1, 2, 3)	CRVO	H47.01 (1, 2, 3)	Ischemic Optic Neuropathy	H33.32 (1, 2, 3)	Retinal Hole
H35.31 (1, 2, 3) 1	ARMD, Dry, Early	H35.71 (1, 2, 3)	Central Serous Retinopathy	H35.41 (1, 2, 3)	Lattice Degeneration		
H35.31 (1, 2, 3) 2	ARMD, Dry, Intermediate	D31.3 (1, 2)	Choroidal Nevus	H35.34 (1, 2, 3)	Macular Hole		
H35.31 (1, 2, 3) 3	ARMD, Dry, Adv, wo Subfov Inv	H31.00 (1, 2, 3)	Chorioretinal Scar	H35.37 (1, 2, 3)	Macular Pucker		
H35.31 (1, 2, 3) 4	ARMD, Dry, Adv, w Subfov Inv	Q14.1	CHRPE	H31.01 (1, 2, 3)	Macular Scar		
H35.32 (1, 2, 3) 1	ARMD, Wet, Active Neovasc	H35.35 (1, 2, 3)	Cystoid Macular Edema (CME)	H44.2 (1, 2, 3)	Myopic Degeneration		
H35.32 (1, 2, 3) 2	ARMD, Wet, Inactive Neovasc	H35.36 (1, 2, 3)	Drusen (degenerative)	H35.72 (1, 2, 3)	Pigm Epithelial Det (PED)		
H35.32 (1, 2, 3) 3	ARMD, Wet, Inactive Scar	H35.6 (1, 2, 3)	Hemorrhage	H33.02 (1, 2, 3)	RD - Multiple Break		43

<b>LIDS/LACRIMAL</b> (1 = OD, 2 = OS, 3 = OU)					
H01.111	Allerg Derm, RUL	H00.15	Chalazion, LLL	H00.025	Hordeolum Int, LLL
H01.112	Allerg Derm, RLL	H40.12 (1, 2, 3)	Dry Eye Syndrome	H16.22 (1, 2, 3)	K-Sicca, Non-Sjo
H01.114	Allerg Derm, LUL	H00.011	Hordeolum Ext, RUL	H02.88A	MGD, RUL/RLL
H01.115	Allerg Derm, LLL	H00.012	Hordeolum Ext, RLL	H02.88B	MGD, LUL/LLL
H01.00A	Bleph, RUL/RLL	H00.014	Hordeolum Ext, LUL	H02.40 (1, 2, 3)	Ptosis
H01.00B	Bleph, LUL/LLL	H00.015	Hordeolum Ext, LLL	H02.051	Trichiasis, RUL
H00.11	Chalazion, RUL	H00.021	Hordeolum Int, RUL	H02.052	Trichiasis, RLL
H00.12	Chalazion, RLL	H00.022	Hordeolum Int, RLL	H02.054	Trichiasis, LUL
H00.14	Chalazion, LUL	H00.024	Hordeolum Int, LUL	H02.055	Trichiasis, LLL

# ECLIPS GUIDE

## ICD-10 Codes

<b>CONJUNCTIVA</b> (1 = OD, 2 = OS, 3 = OU)		<b>CORNEA</b> (1 = OD, 2 = OS, 3 = OU)		<b>IRIS</b> (1 = OD, 2 = OS, 3 = OU)		<b>LENS</b> (1 = OD, 2 = OS, 3 = OU)	
H01.1 (1, 2, 3)	Conjunctivitis - Acute Allergic	H18.42 (1, 2, 3)	Band Keratopathy	D31.4 (1, 2)	Iris Nevus	H26.49 (1, 2, 3)	After Cataract - PCO
H10.01 (1, 2, 3)	Conjunctivitis - Acute Follicular	H18.51	Endo K Dystrophy	H20.01 (1, 2, 3)	Iritis - Acute	H25.01 (1, 2, 3)	Cataract - Cortical
H10.02 (1, 2, 3)	Conjunctivitis - Bacterial	H18.52	Epi (Juvenile) K Dystrophy	H20.1 (1, 2, 3)	Iritis - Chronic	H25.81 (1, 2, 3)	Cataract - Mixed
H10.45 (1, 2, 3)	Conjunctivitis - Chronic Allergic	H18.59	Other Hereditary K Dystrophies	H21.51 (1, 2, 3)	Synechia - Ant	H25.1 (1, 2, 3)	Cataract - Nuclear
H10.41 (1, 2, 3)	Conjunctivitis - Giant Papillary	H18.21 (1, 2, 3)	Corneal Edema - CL Related	H21.54 (1, 2, 3)	Synechia - Post	H25.04 (1, 2, 3)	Cataract - PSC
H11.82 (1, 2, 3)	Conjunctivochalas is	H16.01 (1, 2, 3)	Corneal Ulcer - Central	H57.05 (1, 2, 3)	Tonic Pupil	Z96.1	Pseudopha kia
H11.3 (1, 2, 3)	Conjunctival Hemorrhage	H16.04 (1, 2, 3)	Corneal Ulcer - Marginal				
H11.15 (1, 2, 3)	Pinguecula	B00.52	Herpesviral Keratitis				
H15.11 (1, 2, 3)	Episcleritis	H18.61 (1, 2, 3)	Keratoconus - Stable				
		H11.04 (1, 2, 3)	Pterygium - Stable				

### MOTILITY

(1 = OD, 2 = OS, 3 = OU)

G43.809	Oc Migraine	H50.01 (1, 2)	Esotropia
R51.9	Headache	H50.11 (1, 2)	Exotropia
Z79.899	L/T Use of Med	H50.2 (1, 2)	Hypertropia
H53.8	Blurred Vision	H50.51	Esophoria
Z76.5	Malingering	H50.52	Exophoria
H53.16	Psych Vis Dist	H51.11	Conv. Insuff.
H53.12 (1, 2, 3)	Trans Vis Loss		
H57.1 (1, 2, 3)	Ocular Pain		

### GLAUCOMA (1 = OD, 2 = OS, 3 = OU)

STAGE 1=Mild, 2=Mod, 3=Sev, 4=Ind

		OD Stage	OS Stage
H40.01 (1, 2, 3)	Suspect, Low Risk		
H40.02 (1, 2, 3)	Suspect, High Risk		
H40.05 (1, 2, 3)	Ocular Hypertension		
H40.03 (1, 2, 3)	Anatomical Narrow Angle		
H40.11 (1, 2, 3)	POAG	1 2 3 4	1 2 3 4
H40.12 (1, 2, 3)	NTG	1 2 3 4	1 2 3 4
H40.21 (1, 2, 3)	Angle Closure - Acute	1 2 3 4	1 2 3 4
H40.22 (1, 2, 3)	Angle Closure - Chronic	1 2 3 4	1 2 3 4
H40.13 (1, 2, 3)	Pigmentary	1 2 3 4	1 2 3 4

# ECLIPS GUIDE

## Risk Guide

Risk Level	Label	Code	Presenting Problem	Management Options
Minimal Risk *Requires ONE of the elements in any of two categories listed	Level 2	99202 or 99212	1 Self limited/minor problem	Monitor
Low Risk *Requires ONE of the elements in any of two categories listed	Level 3	99203 or 99213	≥2 Self limited/minor Problems 1 Stable chronic illness (stable DM, cataract) Acute uncomplicated injury or illness	OTC therapy/drugs Minor Surgery with no risk factors
Moderate Risk *Requires ONE of the elements in any of the two categories listed	Level 4	99204 or 99214	2 Stable chronic illnesses 1 Chronic illness with mild exacerbation or progression Undiagnosed new problem with uncertain prognosis (Ex: lesion of unknown significance) Acute complicated injury	Minor surgery with identified risk factors Elective Major Surgery with no identified risk factors (Ex: Cataract surgery) Prescription Drugs
High Risk *Requires ONE of the elements in any of the two categories listed	Level 5	99205 or 99215	≥1 Chronic illness with severe exacerbation or progression Acute/chronic illness or injury which poses a threat to life or bodily function Abrupt change in neurological status (Ex: TIA, weakness, sensory loss)	Drug therapy requiring intensive monitoring for toxicity