

# ECLIPS GUIDE

## Overview

### **Section 1**

#### The Scheduler

- Creating Appointments
- Rescheduling Appointments
- Canceling Appointments
- Arriving Patients (Marking as Arrived)
- Tab Reference Sheet

### **Section 2**

#### Digital Intake Form

### **Section 3**

#### Adding Insurance in Eclips:

- Linking Insurance to Visit

### **Section 4**

#### Pretesting

### **Section 5**

#### Examinations

- Coding and workflow
- Completing Examinations

### **Section 6**

#### Invoicing and Check Out

- Routine Vision
- Medical/Private Pay

### **Section 7**

#### Pre-charting

### **Additional Resources**

- ✓ Knowledge checks
- ✓ Chief Compliant Categories List
- ✓ Popular ICD-10 codes

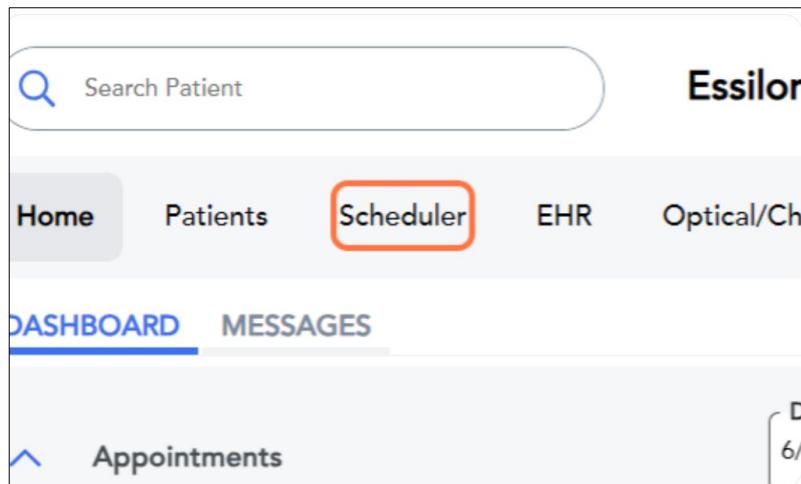
**Technical Issues:** Store System Support Escalation Line 833-467-4244

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

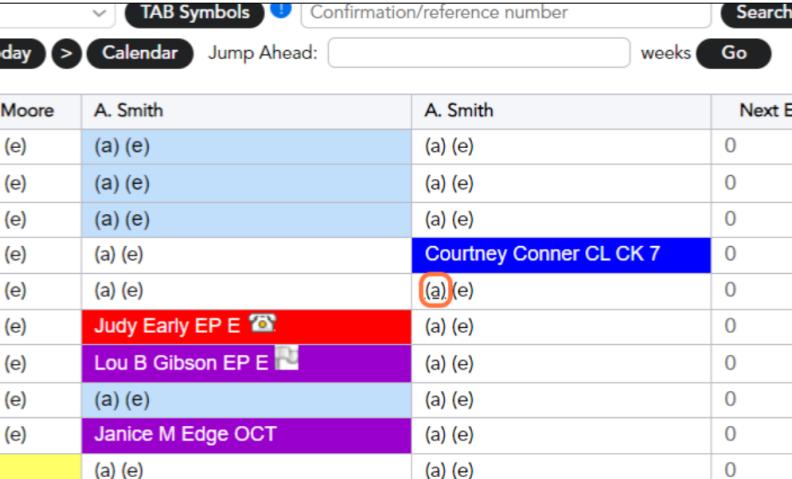
# ECLIPS GUIDE

## 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
	(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 27513
Test Williams, Deana	08/27/1995	(919)222-3333	141 Kildaire Farm Rd Cary, NC 27513
Test, Dale	11/01/1961		na@gmail.com
Test, Danielle	07/26/1994	(919)999-9999	sanfordtech@trianglevisions.com 123 Sesame Street Sanford, NC 27330
Test, Davis	05/26/1978	(999)999-9999	test@test.com 123 Anywhere Lane Raleigh, NC 27603
Test, Devin	04/16/1981	(919)999-0909	205 Tower View Ln Sanford, NC 27330
Test, DoinaTest	01/01/2022	(555)555-3922	
Test, Doinatest	01/01/1990	(555)555-5555	
Test_Doinatest	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
EP E 	(a) (e)	0
son EP E 	(a) (e)	0
	(a) (e)	0
Edge OCT	(a) (e)	0
	(a) (e)	0

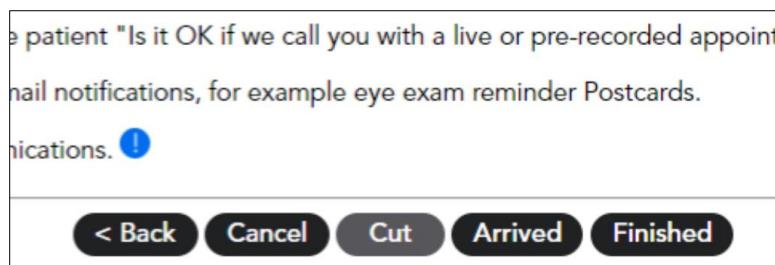
# ECLIPS GUIDE

## 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
EP E	(a) (e)	0
son 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:



### 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

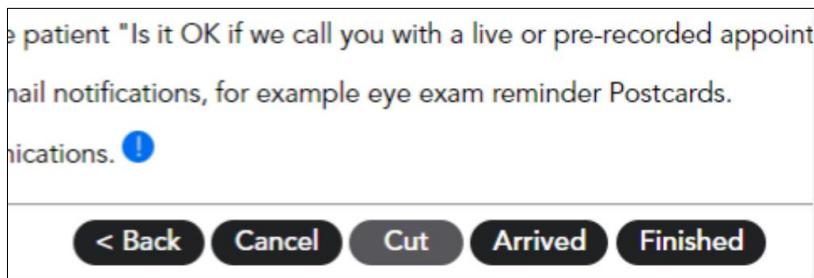
# ECLIPS GUIDE

## Canceling Appointments

### 1. Select the appointment to cancel:

	A. Smith	Next E
	(a) (e)	0
	(a) (e)	0
	(a) (e)	0
	Courtney Conner CL CK 7	0
	Doinga Test F	0
EP E 	(a) (e)	0
son 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:



### 3. Appointment has now been cancelled

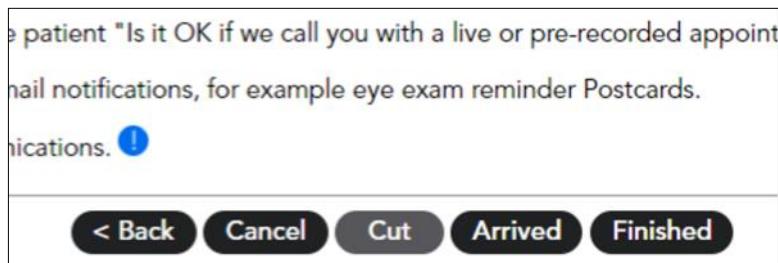
# ECLIPS GUIDE

## Arriving Patients

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
	Doing a Test F	0
EP E	(a) (e)	0
son 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:



3. Patient now arrived in the system.

# ECLIPS GUIDE

## TAB Reference



### Quick Reference

Appointment Color Codes		TAB Symbols	
red	Unconfirmed	forest green	Online confirmed by office
burgundy	Confirmed	pink	Next Eye Exam unconfirmed
light green	Online unconfirmed	purple	Checked-In
dark green	Online confirmed	blue	Checked-Out
		yellow	Event

Finding/Updating Patient Information		Checking a Patient In	
<ul style="list-style-type: none"><li>Click "search" button at top of screen.</li><li>Enter last name or phone number and first name or DOB to locate patient and click search button.</li><li>Click on patient's name.</li><li>Update information.</li></ul>		<ul style="list-style-type: none"><li>Click on patient's appointment.</li><li>Click "check in" button at bottom of screen.</li><li>Appointment should turn purple.</li></ul>	

Checking a Patient Out	
<ul style="list-style-type: none"><li>Click on patient's purple, checked-in appointment.</li><li>Click "check out" button at bottom of screen.</li><li>Click "Yes" to create the next Eye Exam for the patient.</li><li>Complete required fields, including exam type. Click "Next."</li><li>Click "OK" to add NEE info to clipboard at top right of screen.</li><li>The calendar navigates to Unconfirmed NEE page 53, weeks ahead.</li><li>Click "(p)" to paste the patient's information into her desired date and time.</li><li>The Next Eye Exam appointment should turn pink.</li><li>Click "Home" to return to schedule and current day's date.</li><li>Checked out appointment should now be blue.</li></ul>	

Moving the NEE to a Scheduled Appointment	
<ul style="list-style-type: none"><li>Click "search" button at top. Enter last name or phone number and first name or DOB to narrow search. Click "Search."</li><li>Click "update" next to patient's Next Eye Exam.</li><li>Click "cut" button at bottom of screen and "OK" to add patient's information to clipboard at top right of screen.</li><li>Navigate calendar to appropriate day/time on Scheduled Appointments.</li><li>Click "(p)" to paste appointment onto page.</li></ul>	

Rescheduling a Patient	
<ul style="list-style-type: none"><li>Click on patient's name.</li><li>Click "cut" button at bottom of screen and "OK" to add patient's information to clipboard at top right of screen.</li><li>Navigate calendar to appropriate day/time on Scheduled Appointments.</li><li>Click "(p)" to paste appointment onto page.</li></ul>	

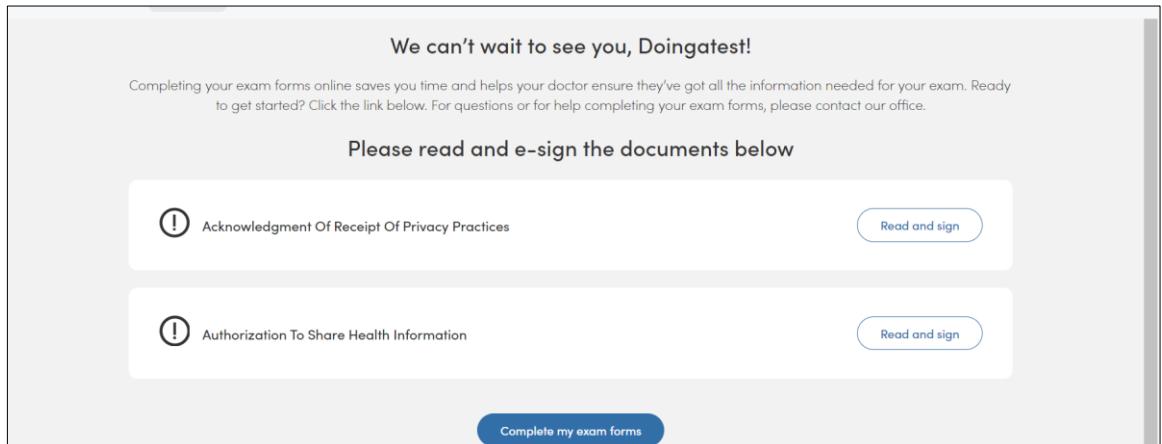
Accessing Reports	
<ul style="list-style-type: none"><li>Click "reports" button at top of screen.</li><li>TAB defaults to the Schedule Report. Other reports can be accessed by clicking on the drop-down arrow to the right of the "print" button.</li><li>Set appropriate parameters, such as beginning and ending time, Optometrist, etc.</li><li>Click "refresh" button at top.</li><li>Click "print" to print.</li></ul>	

Exam symbols	
<p>(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</p>	

# 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.

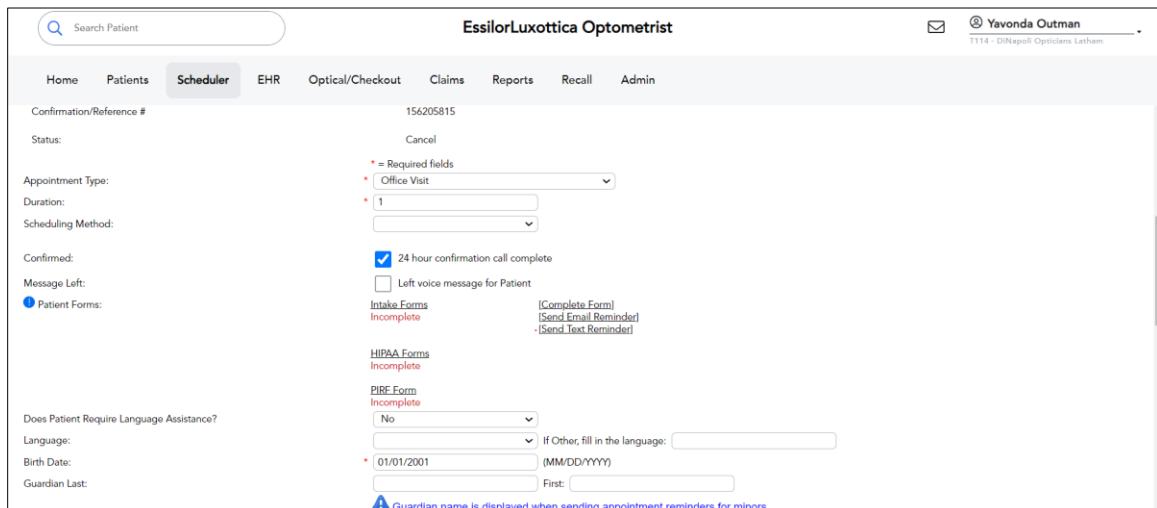
Please read and e-sign the documents below

① Acknowledgment Of Receipt Of Privacy Practices [Read and sign](#)

① 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  
T114 - DiNapoli Opticians Latham

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

Confirmation/Reference # 156205815

Status: Cancel

\* = Required fields

Appointment Type: Office Visit

Duration: 1

Scheduling Method:

Confirmed:  24 hour confirmation call complete

Message Left:  Left voice message for Patient

Patient Forms: [Intake Forms](#) [Complete Form](#) [Incomplete](#) [Send Email Reminder](#) [Send Text Reminder](#)

HIPAA Forms: [HIPAA 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: \_\_\_\_\_

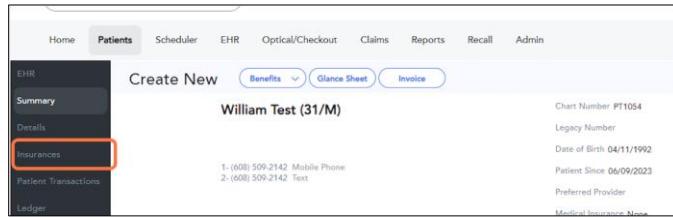
**⚠ Guardian name is displayed when sending appointment reminders for minors**

**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.

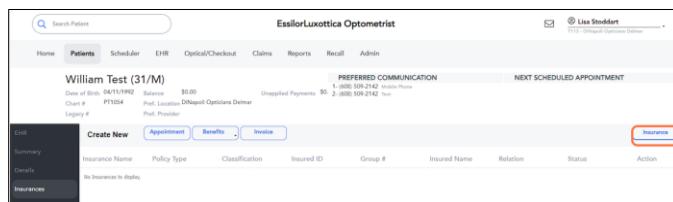
# ECLIPS GUIDE

## 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:

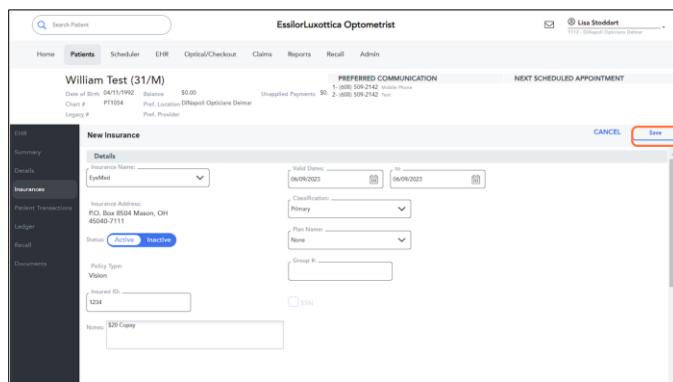


3. Click Insurance on the top right to add a plan:

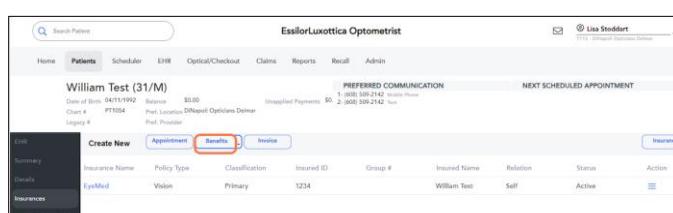


4. Next add the insurance details from the drop-down menu
5. Complete the following: Type Of Insurance, Valid Dates, Classifications, Active Status, ID Number, Auth # If Relevant, Primary Member, Any Notes, Etc.
6. Once finished click Save

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



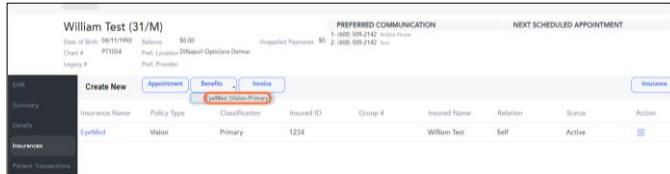
7. Repeat prior steps if patient has additional insurance (Medical + Vision)
8. Once saved, select Benefits to tell Eclips what the benefits are:



# ECLIPS GUIDE

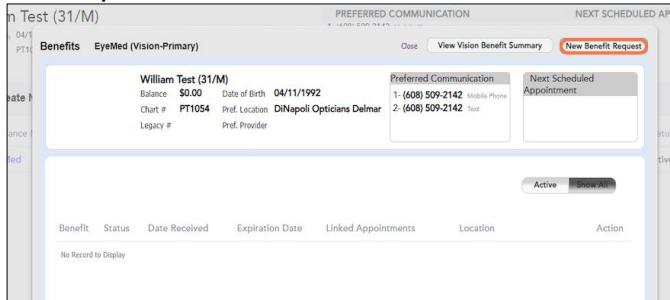
## Adding Insurance

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



William Test (31/M)  
Date of Birth: 04/11/1992  
Insurance: EyeMed  
Chart #: PT1054  
Pref. Location: DiNapoli Opticians Delmar  
Pref. Provider: Legacy #  
Create New **Appointments** **Benefits** **e-Benefit** **Print**  
Insurance Name: EyeMed  
Policy Type: Vision  
Classification: Primary  
Insured ID: 1234  
Group #:   
Insured Name: William Test  
Relation: Self  
Status: Active  
Action: 

10. Select New benefit request:



William Test (31/M)  
Benefits EyeMed (Vision-Primary)  
William Test (31/M)  
Balance: \$0.00 Date of Birth: 04/11/1992  
Chart #: PT1054 Pref. Location: DiNapoli Opticians Delmar  
Legacy #: Pref. Provider:  
Preferred Communication: 1-(608) 509-2142 Mobile Phone  
2-(608) 509-2142 Text  
Next Scheduled Appointment  
Active   
Benefit Status Date Received Expiration Date Linked Appointments Location Action  
No Record to Display

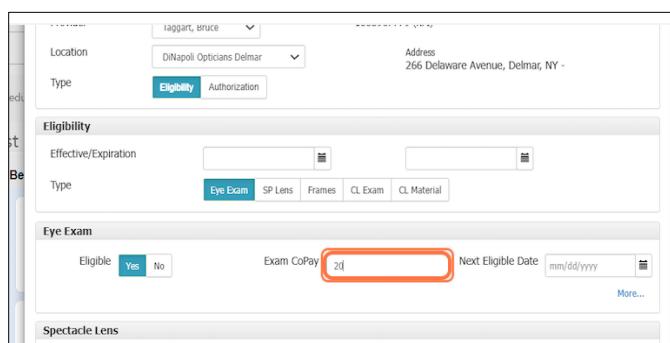
11. Select Enter Benefits to edit patient insurance:



Patient/Insured Details  
William Test Patient Self Relationship to Insured 1234 Insured ID  
Insurance  
EyeMed (Vision-Primary)  
None **Enter Benefit** **e-Benefit**

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.



Eligibility  
Effective/Expiration

Type

Eye Exam  
Eligible: Yes  Exam CoPay: **20**  Next Eligible Date:

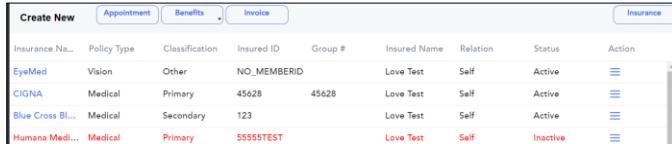
14. Click Save on the bottom right then select close located at the top of screen:



# ECLIPS GUIDE

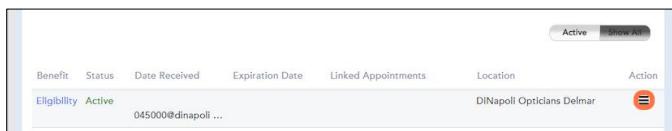
## Adding Insurance

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	55555TEST		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	

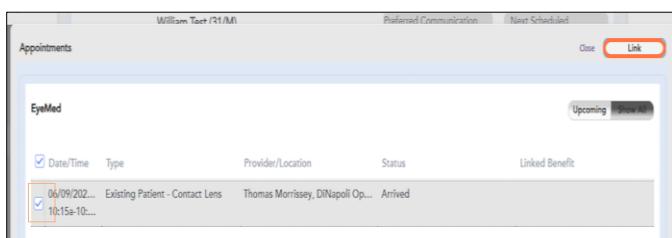
17. Select Link Appointment:



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

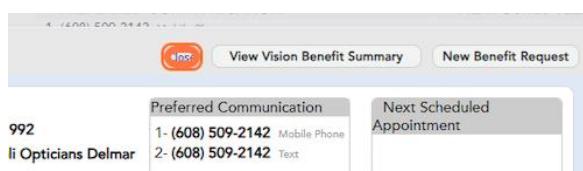
18. Choose the appropriate appointment to link to insurance

19. Select Link Appointment:



Appointments				
Upcoming 				
<b>EyMed</b>				
Date/Time	Type	Provider/Location	Status	Linked Benefit
<input checked="" type="checkbox"/> 06/09/2022 10:15a-10:45a	Existing Patient - Contact Lens	Thomas Morrissey, DINapoli Op...	Arrived	

20. Close the pop-up window:



View Vision Benefit Summary    New Benefit Request

Preferred Communication: 992 1- (608) 509-2142 Mobile Phone  
li Opticians Delmar 2- (608) 509-2142 Text

Next Scheduled Appointment

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

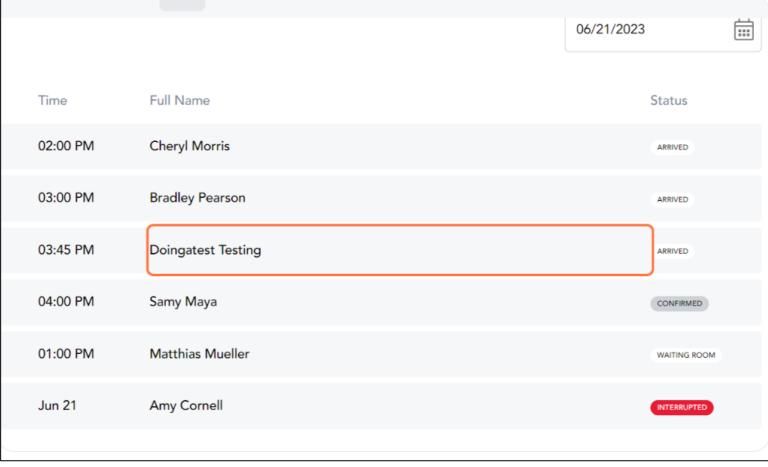


Patient# / Dob	Phone #	Last Update	Scheduled Time	Resource	Status	Status
William Test (31/M) PT1054 04/11/1992	(608) 509-2144	  Arrived	Existing Patient - Contact L	10:15 AM - 10:45 AM Morrissey, Thom DINapoli Opticians	 EyeMed	 

# ECLIPS GUIDE

## Pretesting

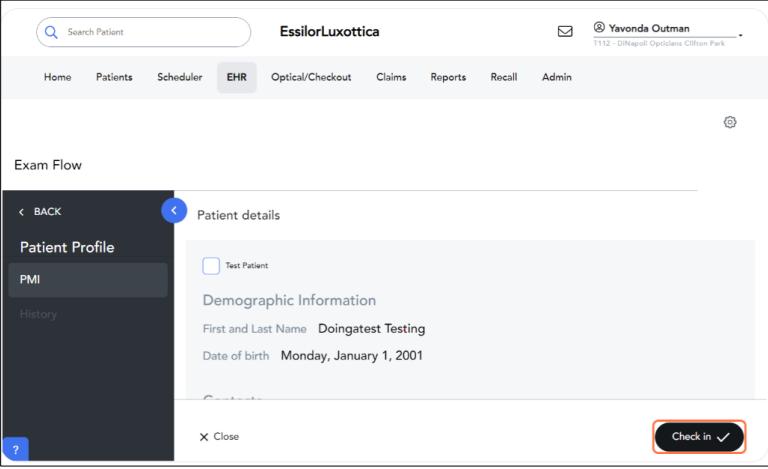
1. Go EHR and select the patient.:



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

Patient Profile

PMI

History

Test Patient

Demographic Information

First and Last Name: Doingatest Testing

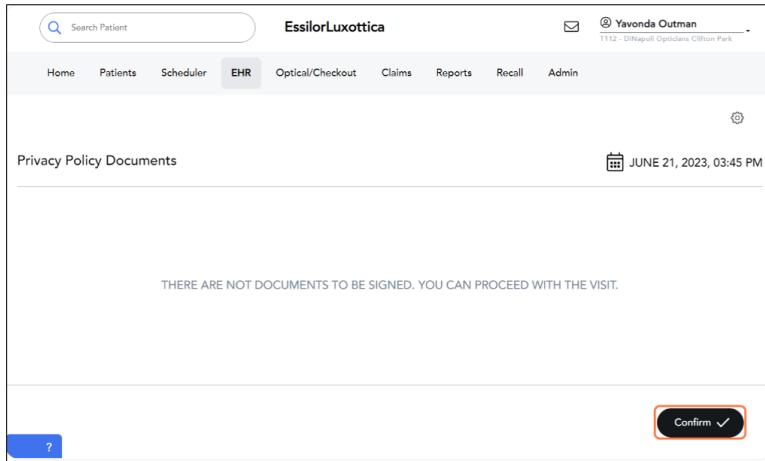
Date of birth: Monday, January 1, 2001

Close Check in ✓

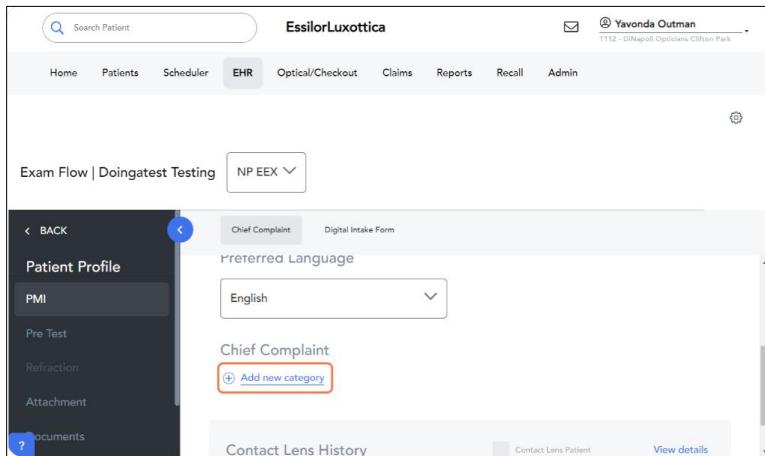
# ECLIPS GUIDE

## Pretesting

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



5. Click on Add New Category:



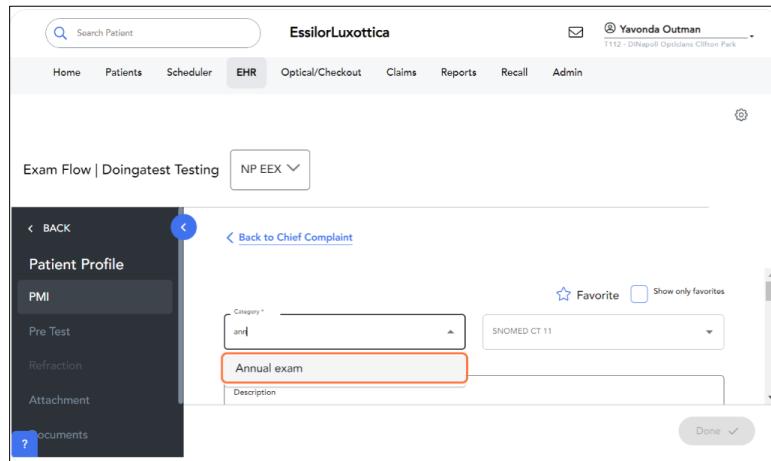
6. Click Add New Category and Select a Chief complaint category.

**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.**

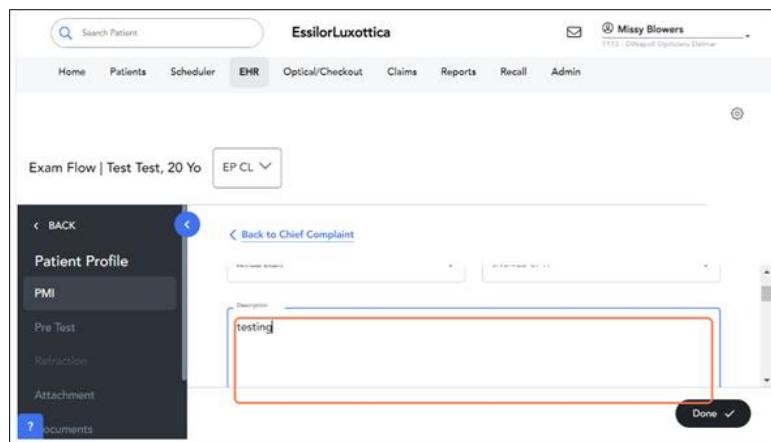
# ECLIPS GUIDE

## Pretesting

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



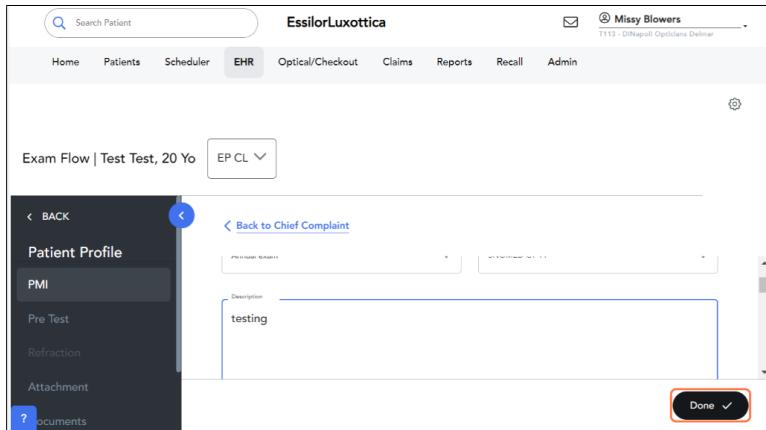
8. Input details of chief complaint and appropriate patient history:



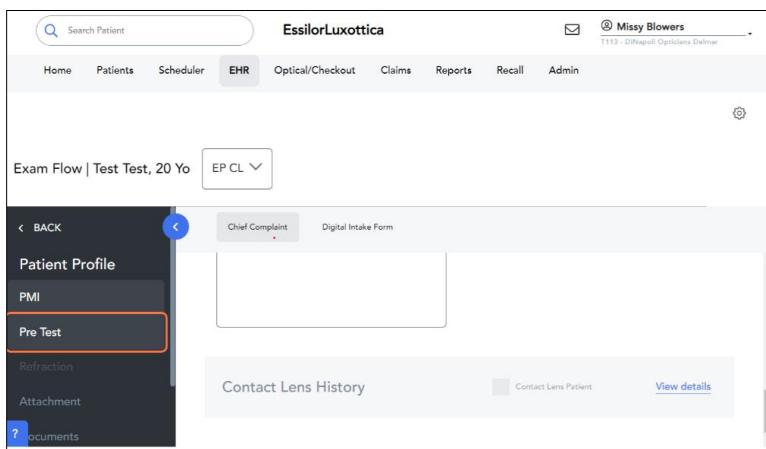
# ECLIPS GUIDE

## Pretesting

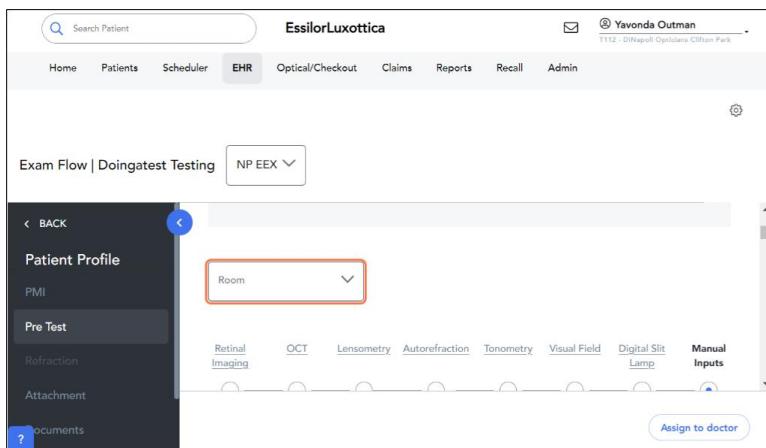
### 9. Click Done:



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

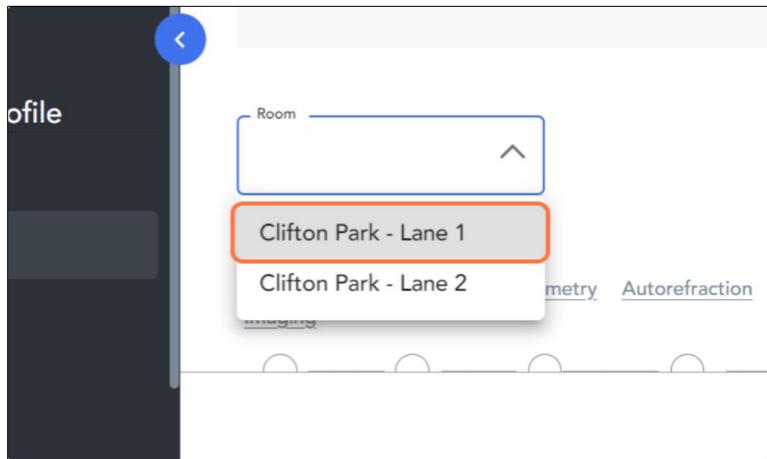


### 11. Select the Room the patient where patient will be located:

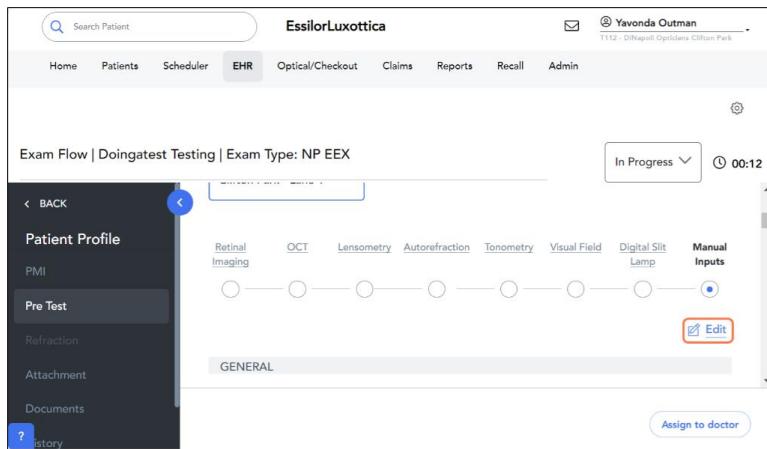


# ECLIPS GUIDE

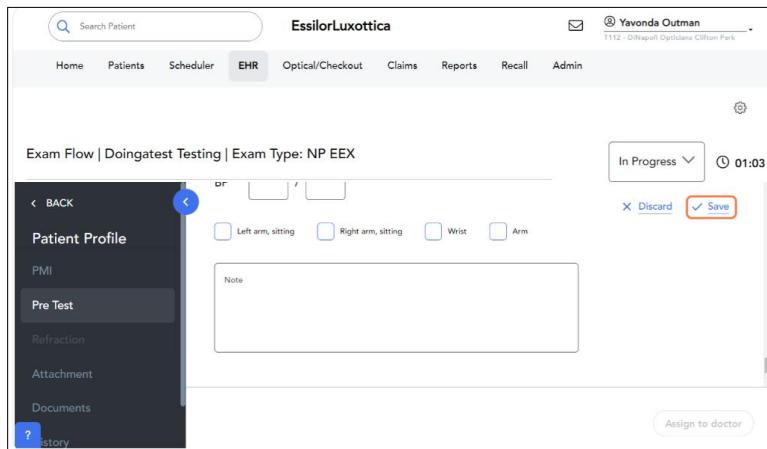
## Pretesting



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



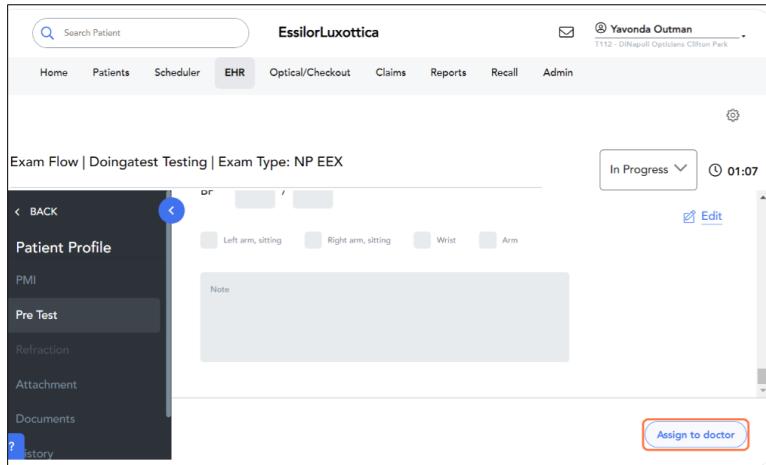
13. Once all fields are complete, Select Save:



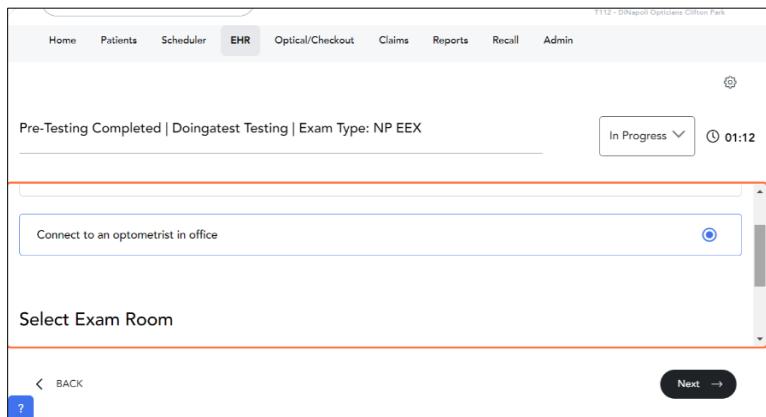
# ECLIPS GUIDE

## Pretesting

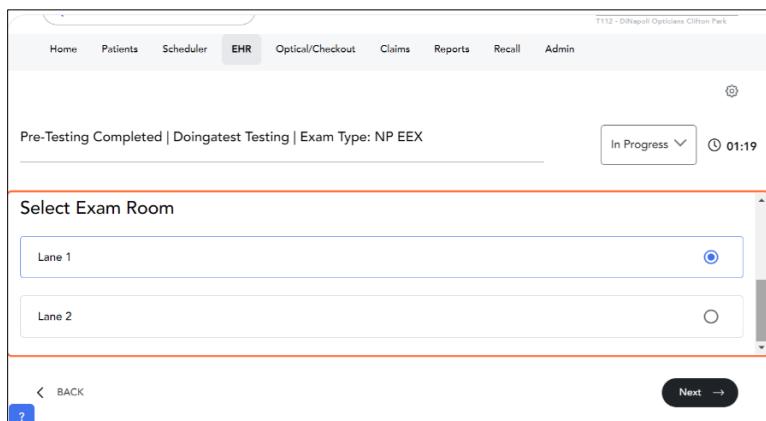
14. Click on Assign to Doctor (**must** be completed to progress the exam):



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



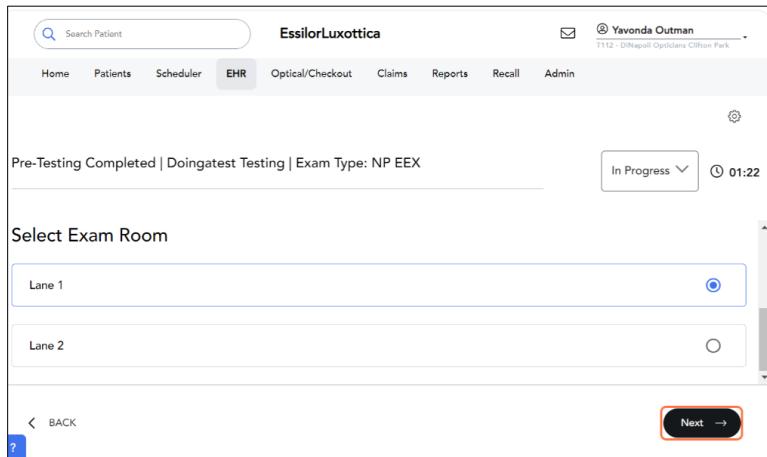
16. Scroll down and Select the appropriate exam room:



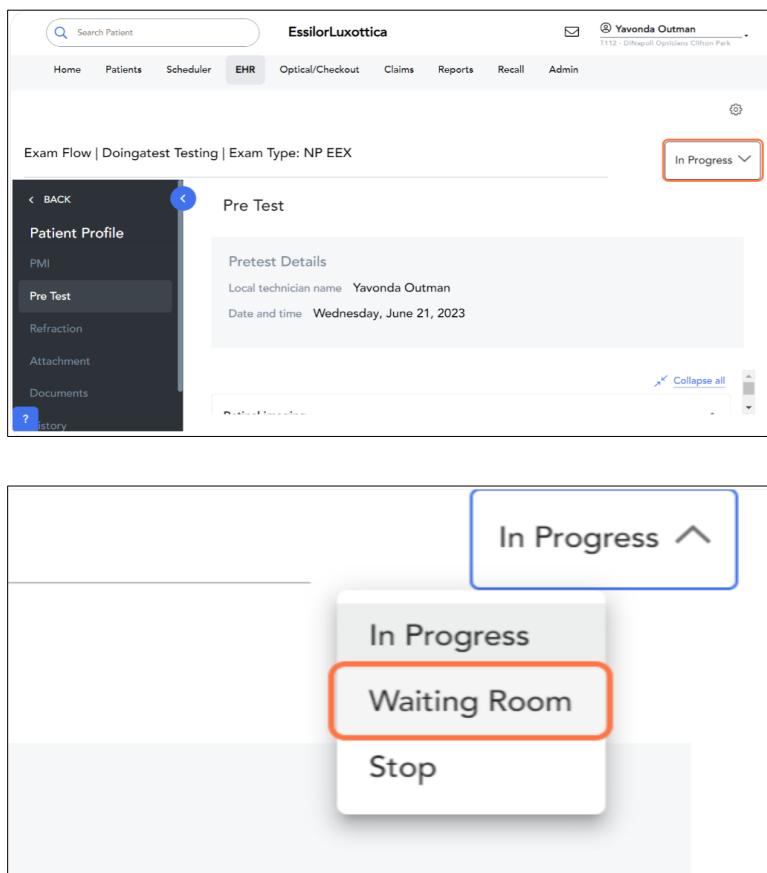
# ECLIPS GUIDE

## Pretesting

17. Click Next:



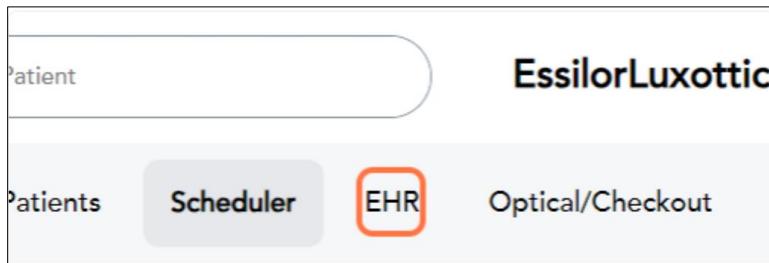
18. To put the patient back in the waiting room, select the waiting room from the status bar at the top right of the page (optional):



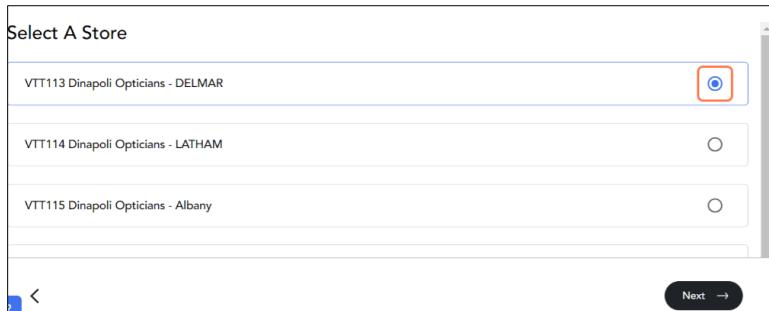
# ECLIPS GUIDE

## Examinations

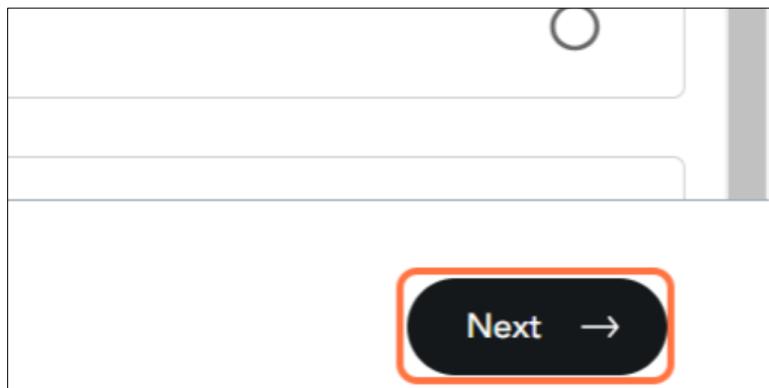
1. Click on EHR to select the patient:



2. Select the appropriate location:



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

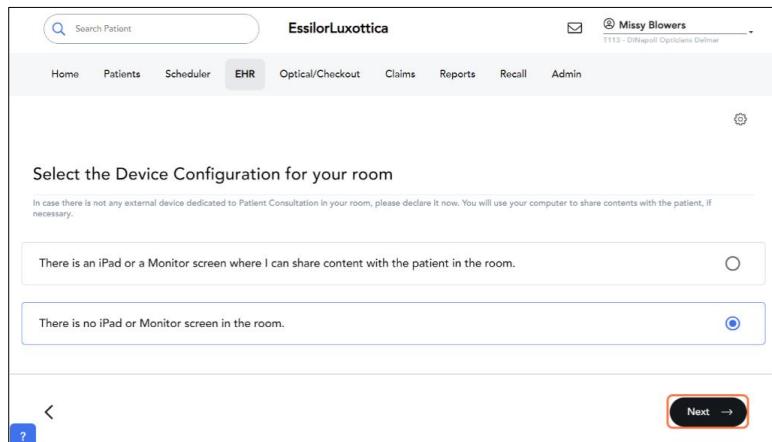


# ECLIPS GUIDE

## Examinations

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

5. Select Next:



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.

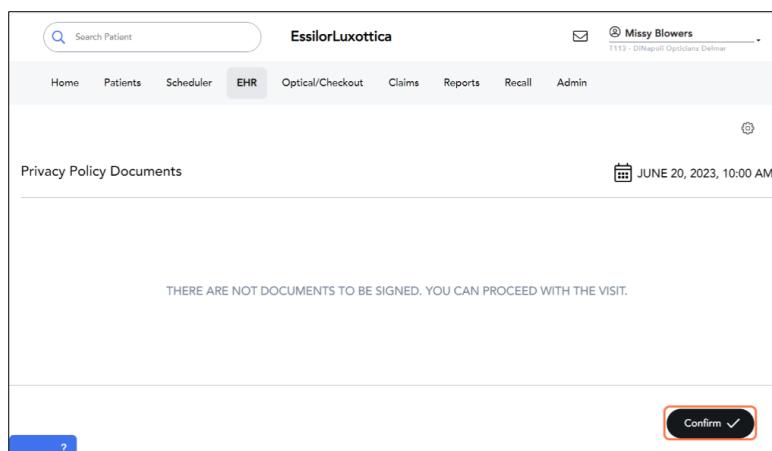
There is no iPad or Monitor screen in the room.

[Next →](#)

6. Select the appropriate patient from the EHR screen:

Appt Time	Name And Location	Exam Type	St
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:



Privacy Policy Documents

JUNE 20, 2023, 10:00 AM

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

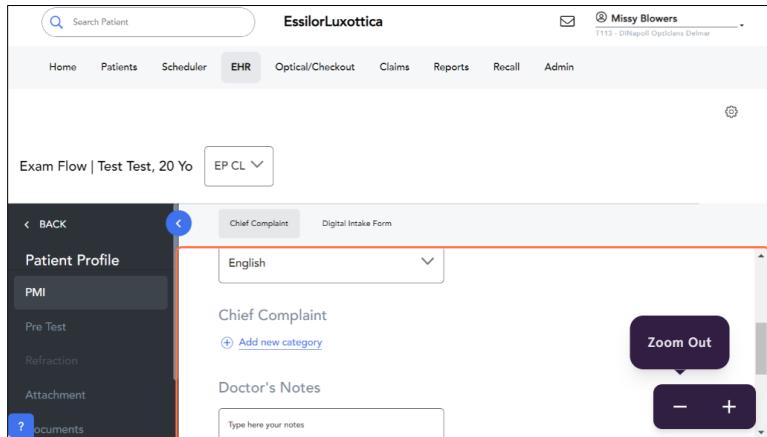
[Confirm ✓](#)

# ECLIPS GUIDE

## Examinations

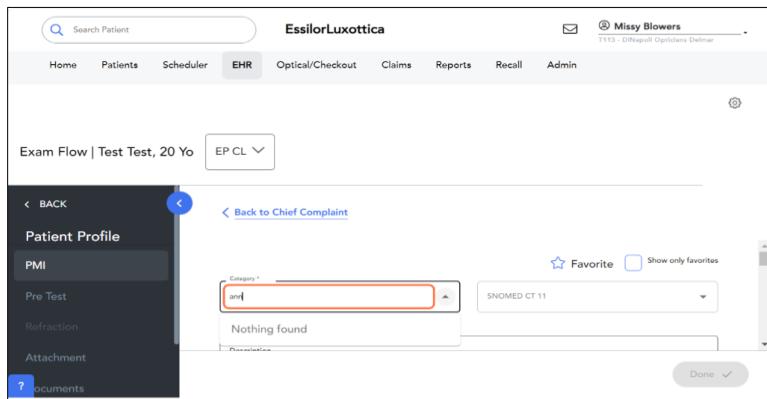
8. Select PMI from the black toolbar to the right:
9. Review Digital Intake Form with patient (optional)

**Note:** If tech has performed pretest skip to step #24



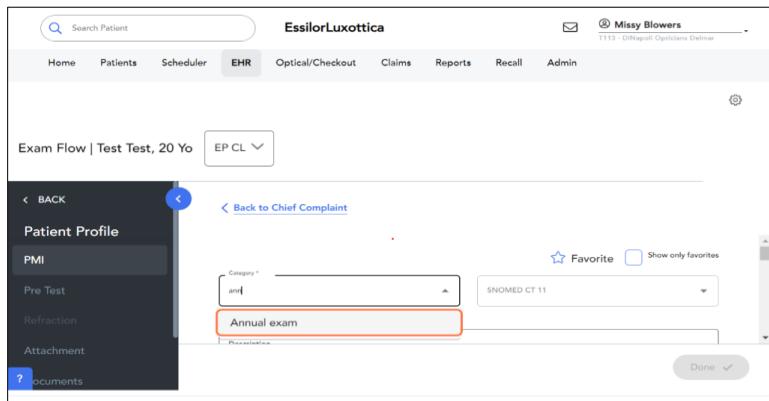
10. Click Add New Category
11. Select a Chief complaint category

**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 list can be found at the end of this guide.**

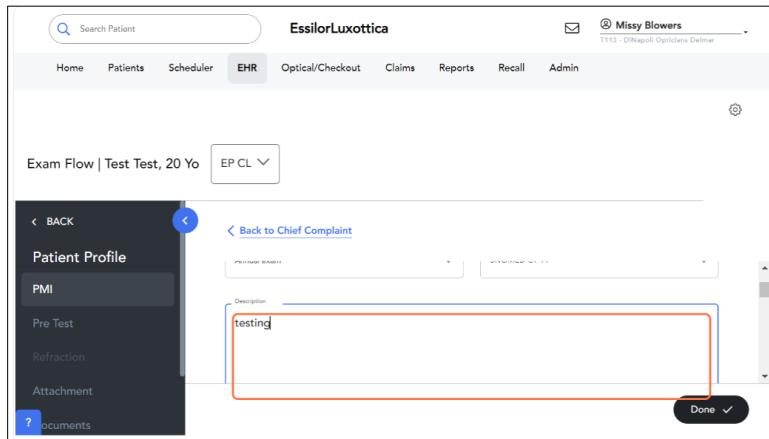


# ECLIPS GUIDE

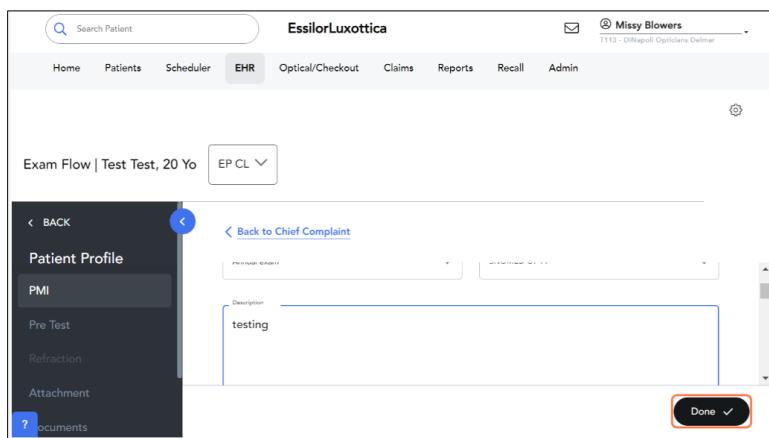
## Examinations



### 12. Type details of chief complaint:



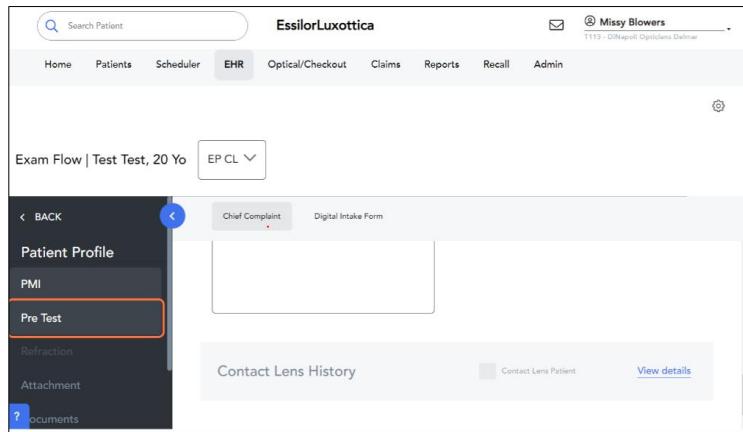
### 13. Click Done:



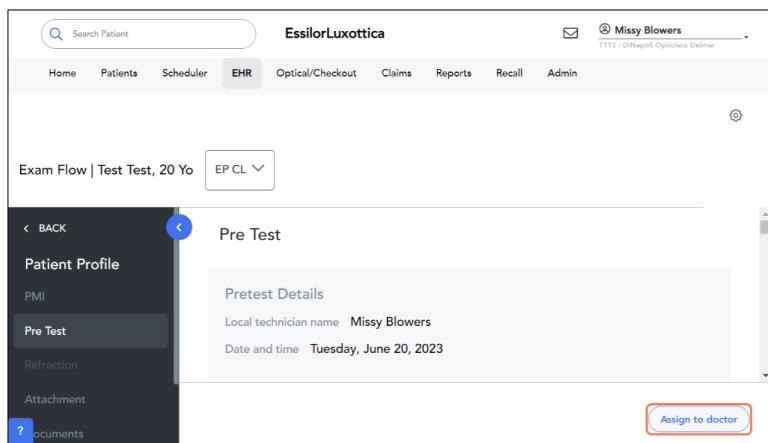
# ECLIPS GUIDE

## Examinations

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

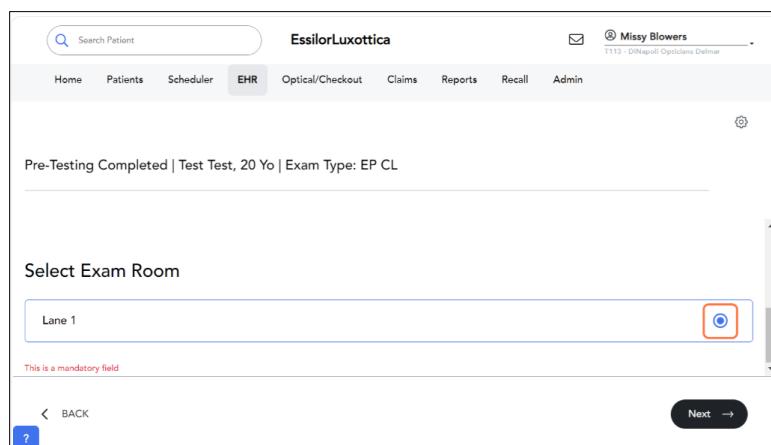


15. Click Assign to Doctor on the lower right:



16. You should now see “Pre-Testing Completed” at the top of the page

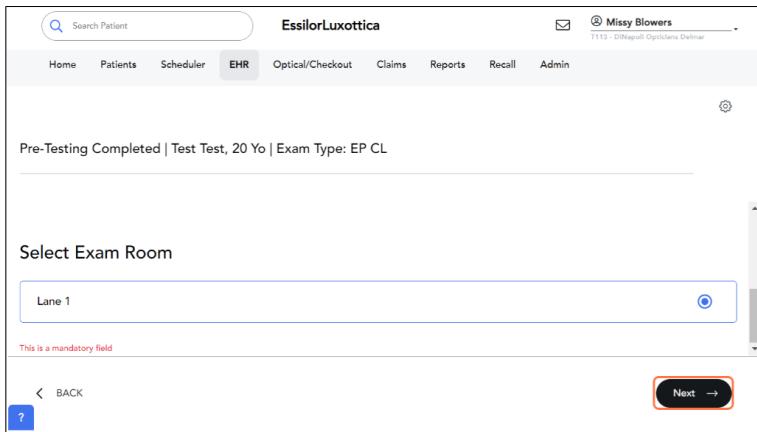
17. Next scroll down to select an Exam Room:



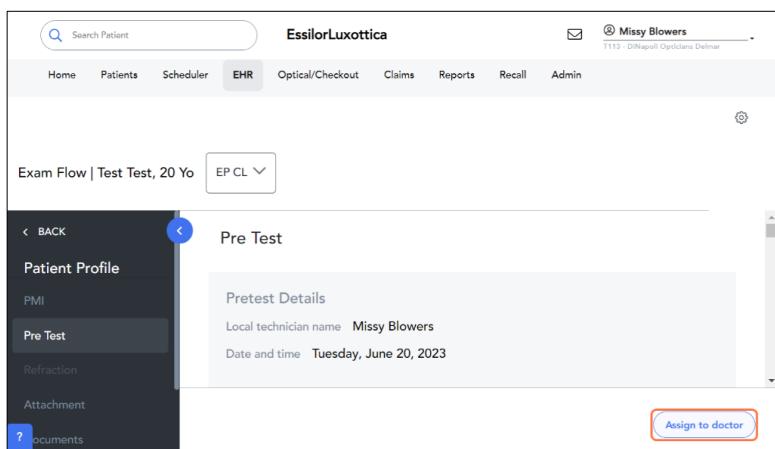
# ECLIPS GUIDE

## Examinations

18. Click Next:

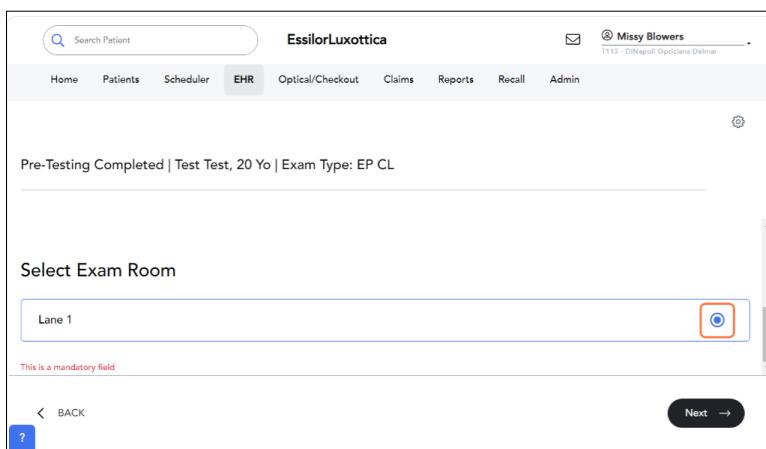


19. Click Assign to Doctor on the lower right:



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

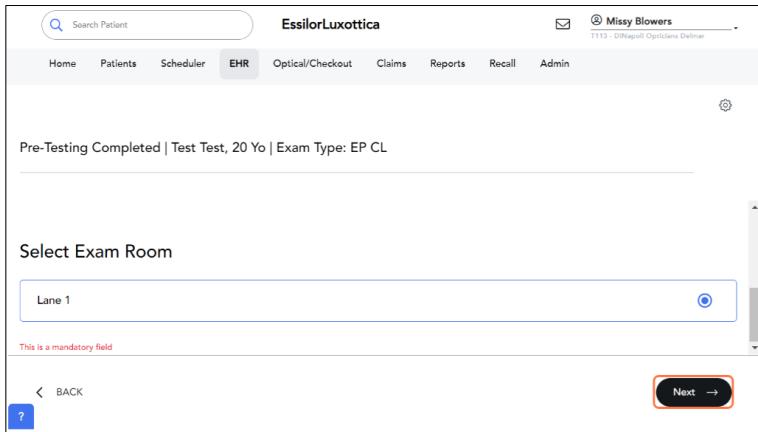
21. Next scroll down to select Exam Room:



# ECLIPS GUIDE

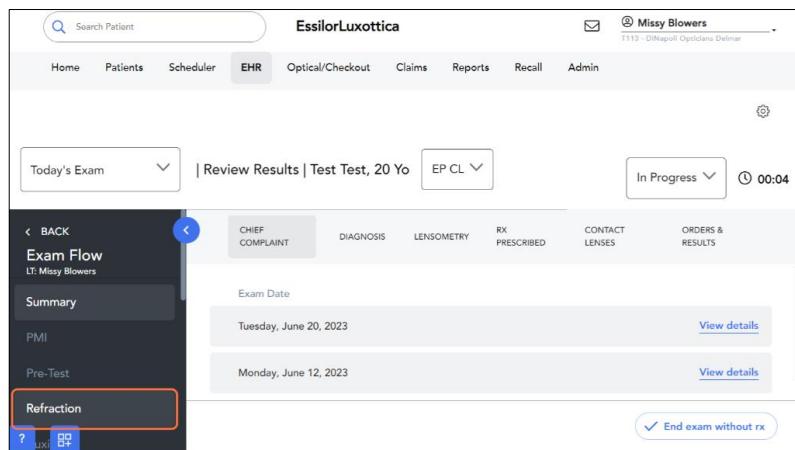
## Examinations

22. Click Next:



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

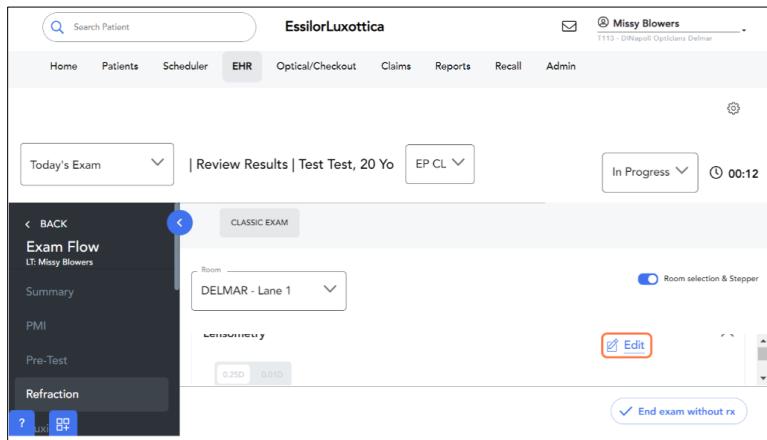
24. Select Refraction:



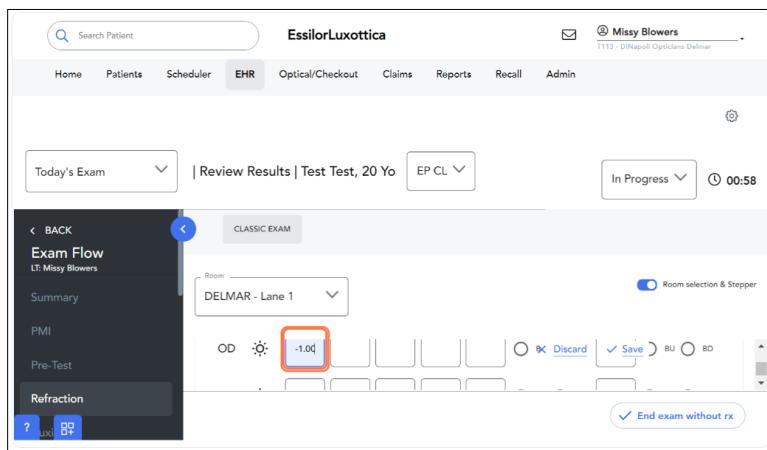
# ECLIPS GUIDE

## Examinations

### 25. Click Edit:



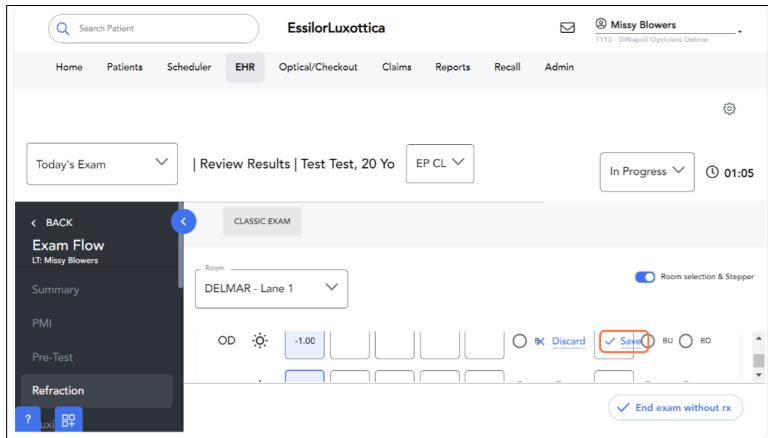
### 26. Enter in refractive data in the appropriate section:



# ECLIPS GUIDE

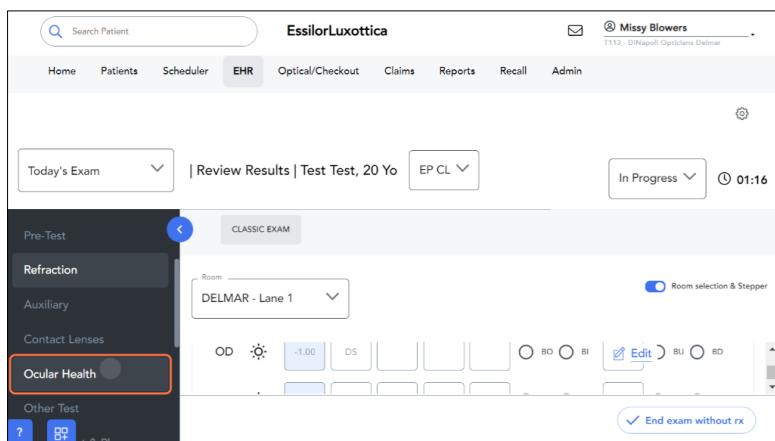
## Examinations

27. Click Save:

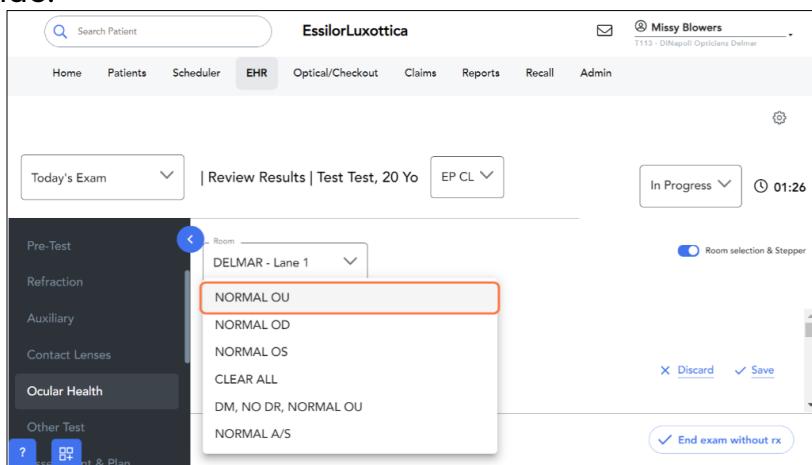


28. Click Contact Lenses and fill out appropriate information if needed

29. Click on Ocular Health:



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:

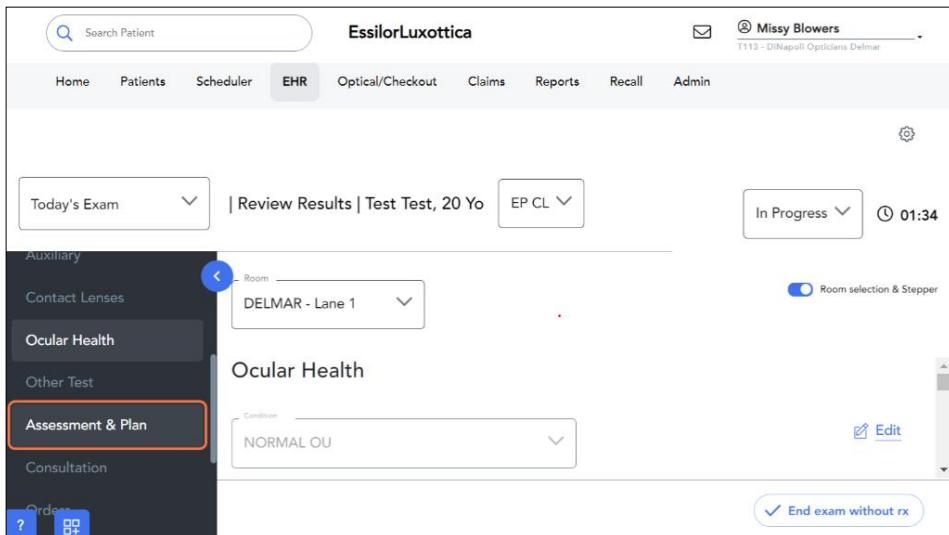


# ECLIPS GUIDE

## Examinations

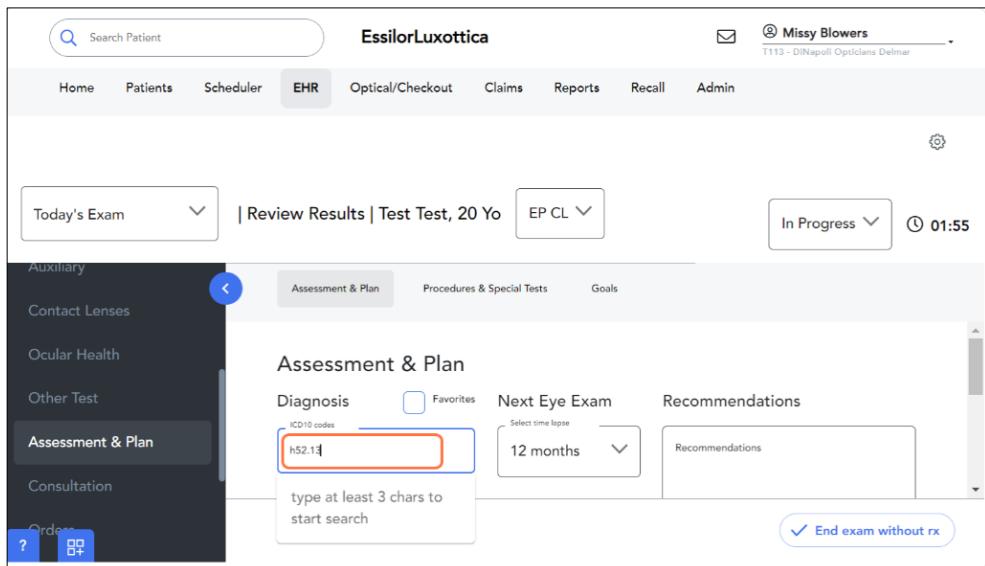
31. Click Save

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



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)

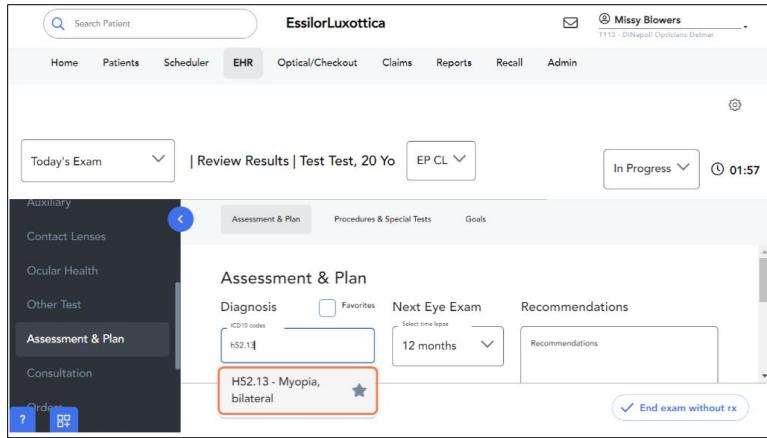
**Note:** You cannot free type in this section



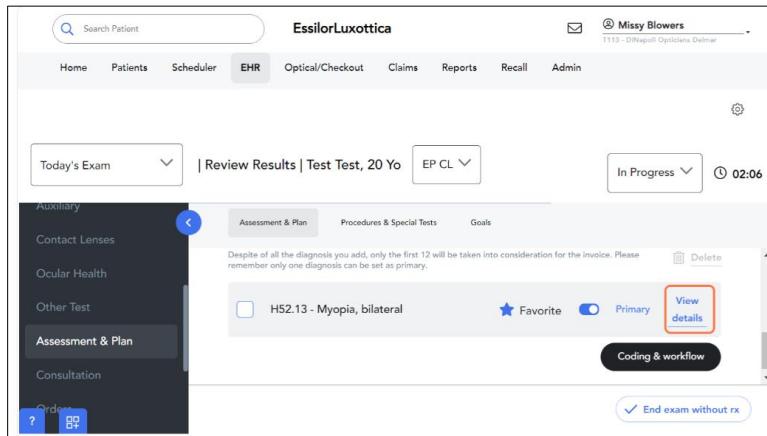
# ECLIPS GUIDE

## Examinations

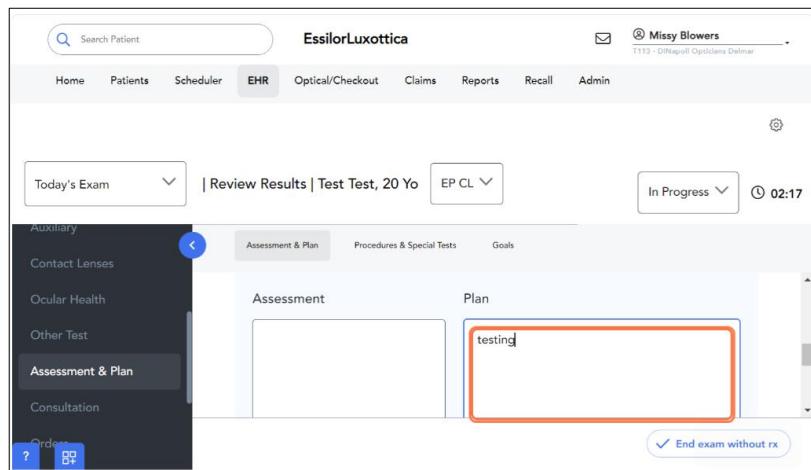
### 34. Select the appropriate diagnosis codes:



### 35. Click View Details on each diagnosis:



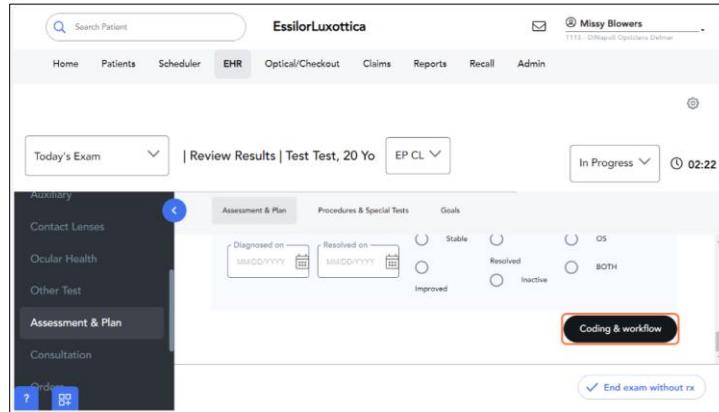
### 36. Type out the assessment and plan for each diagnosis:



# ECLIPS GUIDE

## Examinations

### 37. Select Coding and Workflow:

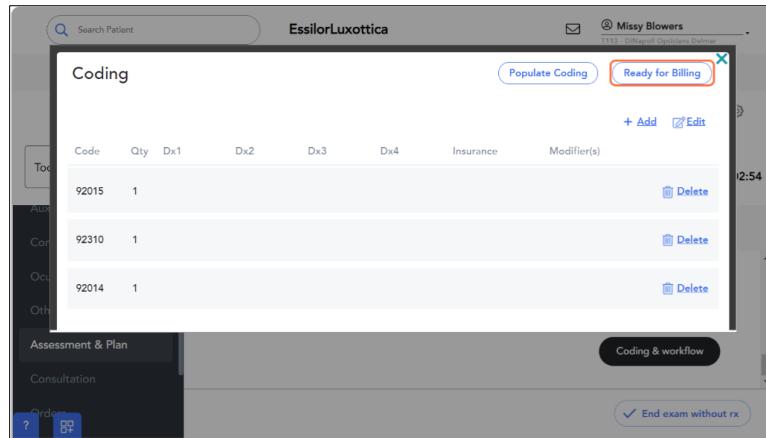


### 38. Click Populate Coding

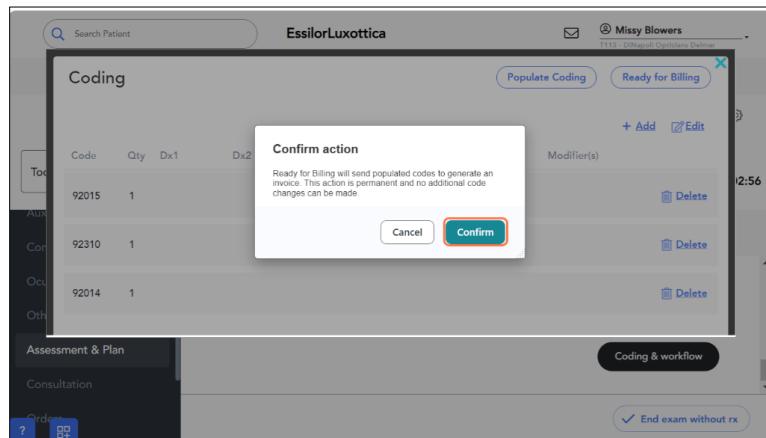
### 39. Review codes (to add or edit codes use the buttons on the right)

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

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



### 41. Confirm Action:

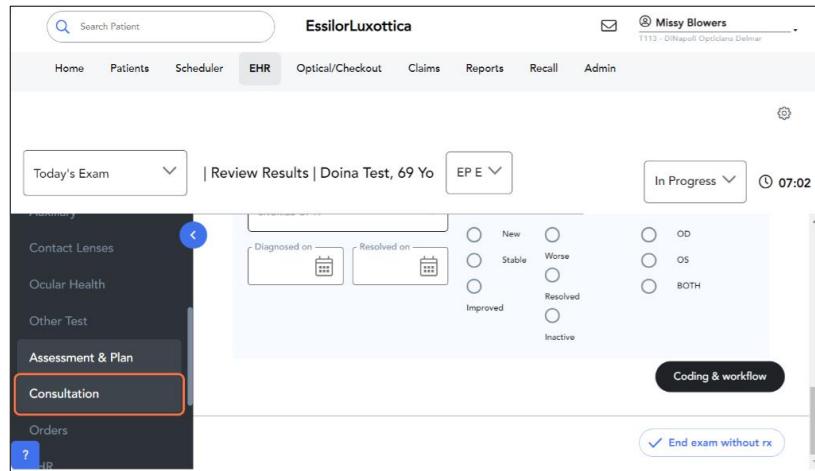


# ECLIPS GUIDE

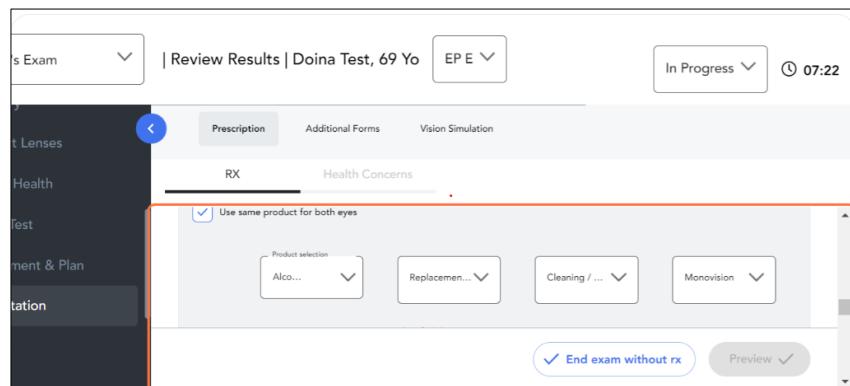
## Examinations

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

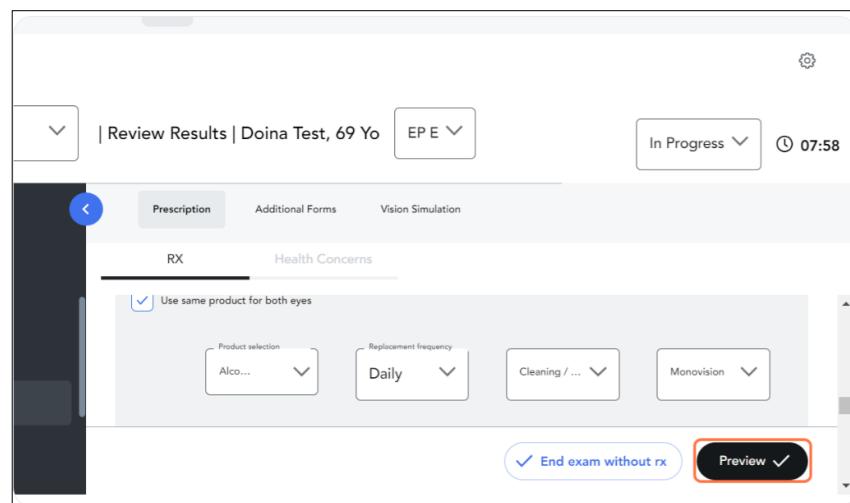
43. Select Consultation from the Black tool bar on the left:



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



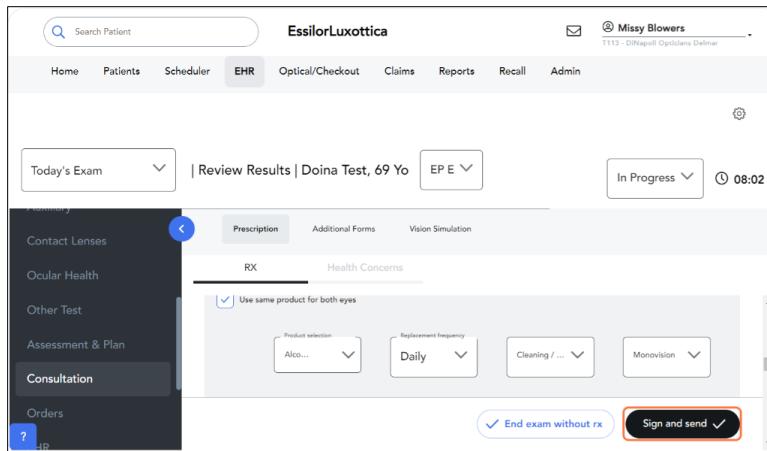
45. Click Preview:



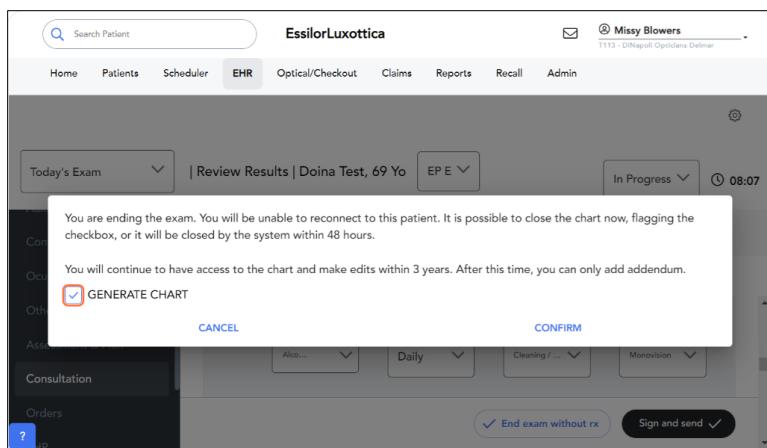
# ECLIPS GUIDE

## Examinations

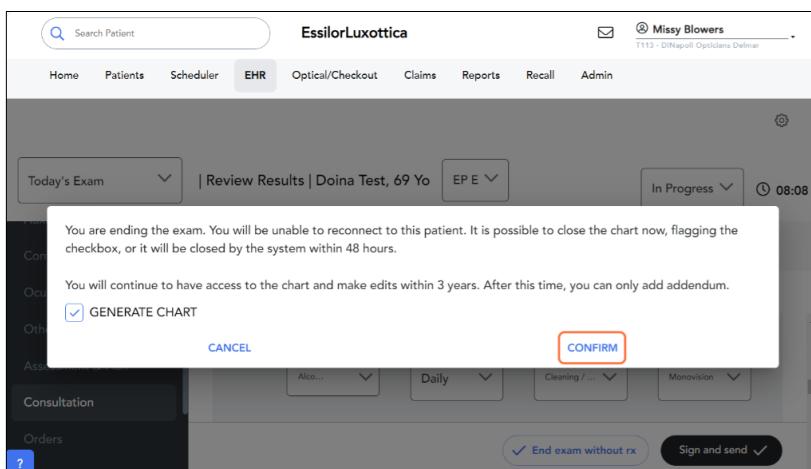
### 46. Select Sign and Send:



### 47. Select Generate Chart:



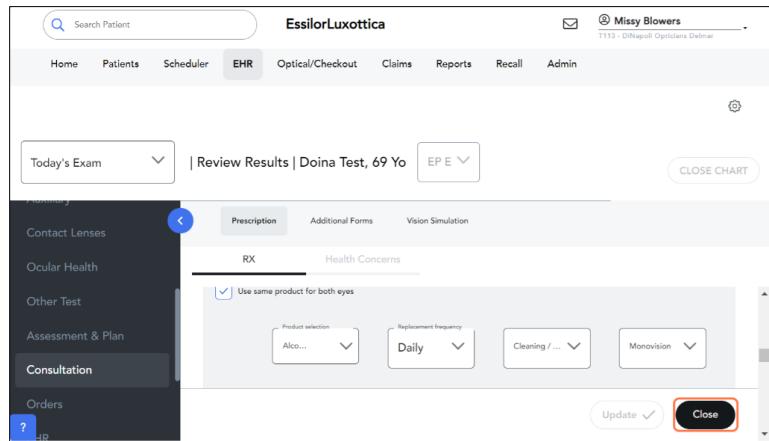
### 48. Select confirm:



# ECLIPS GUIDE

## Examinations

### 49. Select consultation:



### 50. Print Rx by going to documents

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

### 52. Select Print

#### **IMPORTANT**

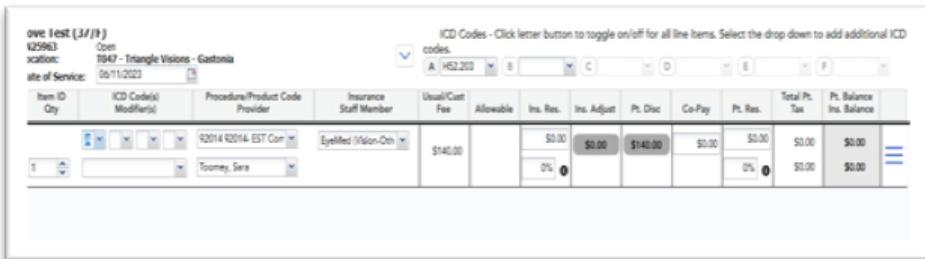
**The following items MUST be completed before the patient is brought out to optical or check out.**

- ✓ 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

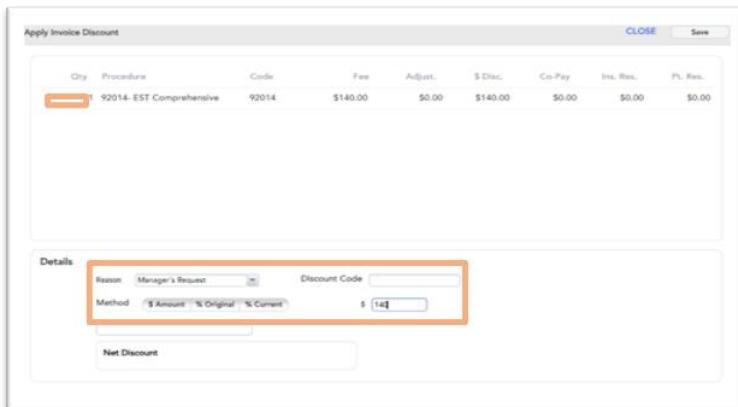
# ECLIPS GUIDE

## 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:



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

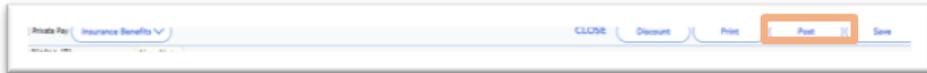


7. Once the discount window appears, select the item(s) you want to discount and by how much (use either the dollar amount or percentage)
8. Select save when finished

# 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 Open  
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	ICD Code(s)	Procedure/Product Code	Insurance	Usual/Cust	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc	Co-Pay	Pt. Res.	Total Pt.	Pt. Balance	Ins. Balance
	City	Modifier(s)	Provider	Staff Member	Fee									
			92014 92014- EST Corr	EyeMed (Vision-Oth)	\$140.00		\$0.00	\$0.00	\$140.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1			Toomey, Sara				0%							

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

**MEDICAL PLANS**

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

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

(+)	Item ID	ICD Code(s)	Procedure/Product Code	Insurance	Usual/Cust	Allowable	Ins. Res.	Ins. Adjust	Pt. Disc	Co-Pay	Pt. Res.	Total Pt.	Pt. Balance	Ins. Balance
	City	Modifier(s)	Provider	Staff Member	Fee									
A	99214 - 99214- E&M Lr	vol 4 Ext	Blue Cross Blue Shield Of NC	Smith	\$200.00	\$74.29	\$74.29	\$125.71	\$0.00	\$40.00	\$0.00	\$40.00	\$0.00	
1							46.16%							
A	92134 - 92134 Retina O	CT	Blue Cross Blue Shield Of NC	Smith	\$120.00	\$39.59	\$39.59	\$80.41	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
1							100%							

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

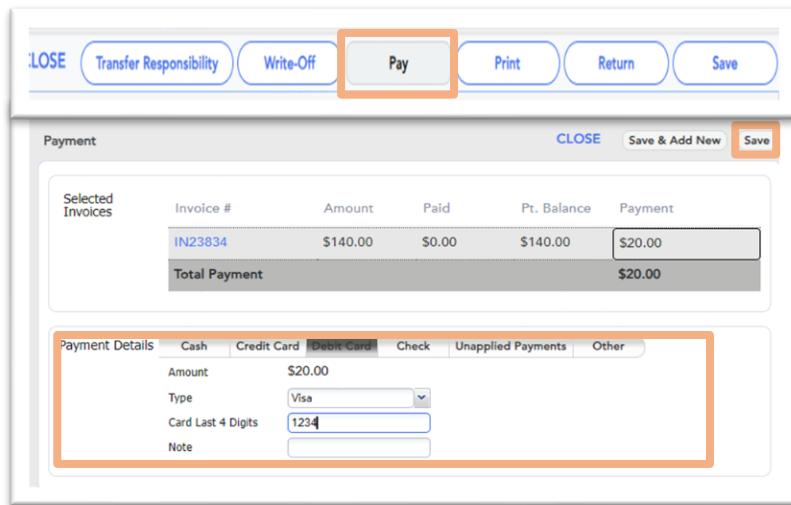
**PT BAL should always be \$0 (apply payments). Only BAL left is Ins. Balance.**

**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.**

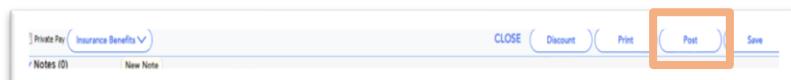
# ECLIPS GUIDE

## Medical Invoicing

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



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

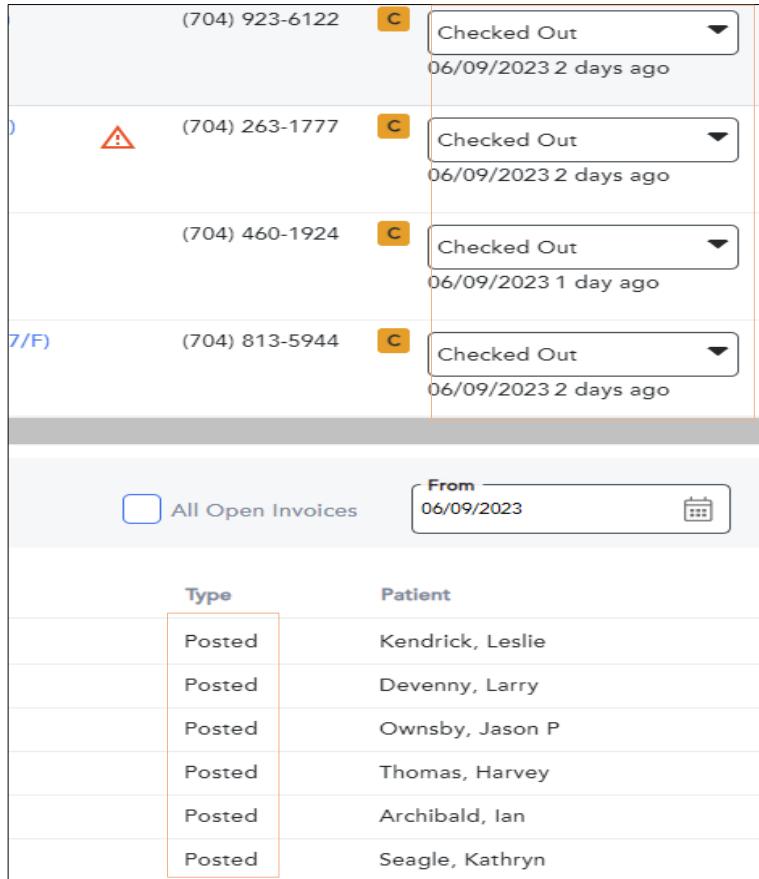


10. If you have additional questions: please refer to your Insurance Binder

# ECLIPS GUIDE

## Medical Invoicing

**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:



The screenshot shows the ECLIPS Medical Invoicing interface. At the top, there is a list of patients with their phone numbers and check-out status:

	Phone Number	Check-Out Status	Date
	(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

Below this is a search bar with a checkbox for "All Open Invoices" and a date range from "06/09/2023".

At the bottom, there is a table showing a list of posted invoices:

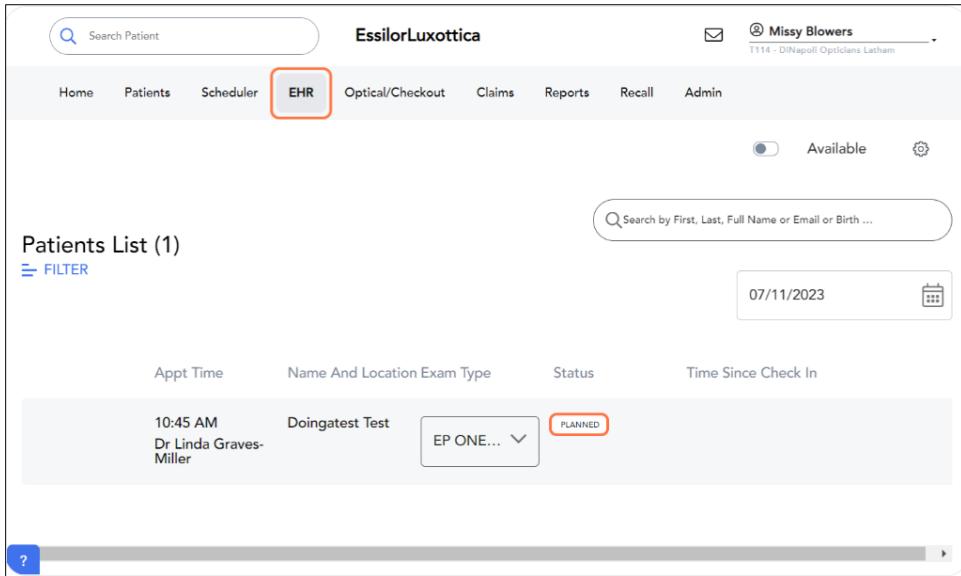
Type	Patient
Posted	Kendrick, Leslie
Posted	Devenny, Larry
Posted	Ownsby, Jason P
Posted	Thomas, Harvey
Posted	Archibald, Ian
Posted	Seagle, Kathryn

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

# ECLIPS GUIDE

## Pre-charting

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:



Patients List (1)

Appt Time Name And Location Exam Type Status Time Since Check In

Appt Time	Name And Location	Exam Type	Status	Time Since Check In
10:45 AM Dr Linda Graves-Miller	Doingatest Test	EP ONE... ▾	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

# ECLIPS GUIDE

## Knowledge Checks

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

- Create an Appointment in scheduler
- 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

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
Floater	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>76514</b> Pachymetry	<b>VISIT TYPE</b>	H53.02	Amblyopia, Refractive
<b>92132</b> OCT-Ant Seg	<b>92015</b> REFRACTION	(1, 2, 3)	
<b>92133</b> OCT-Nerve	<b>S9986-1</b> OPTOS	H53.03 (1, 2, 3)	Amblyopia, Strabismic
<b>92134</b> OCT-Retina	<b>SELF PAY EXAM (w OPTOS)</b>	<b>INJURY/TRAUMA (1 = OD, 2 = OS, 3 = OU)</b>	
<b>92081</b> HVF Screen/DMV	<b>92310-1</b> ANNUAL CL EVAL	A=Initial Encounter, D=Subsequent Encounter, S=Sequela	
<b>92083</b> HVF Extensive	<b>92310-2</b> SCL PREMIUM EVAL		
<b>92250</b> Fundus Photography	<b>92310-3</b> NEW FIT/ADV REFIT	S05.0 (1, 2) X (A, D, S)	Abrasion - Cornea/Conj
	<b>92310-4</b> ADVANCED NEW FIT	T15.1 (1, 2) X (A, D, S)	Foreign Body - Conjunctival
	SEE CL CODE DOCUMENT FOR ADDTL CODES		
<b>92285</b> External Photography	<b>66984-55</b> POST-OP	T15.0 (1, 2) X (A, D, S)	Foreign Body - Cornea
	<b>99499</b> RX/CL CHECK	T26.6 (1, 2) X (A, D, S)	Chemical Burn - Cornea/Conj
<b>92025</b> Corneal Topography	<b>99024</b> NC POST-OP F/U	H16.14 (1, 2, 3)	Keratitis

# ECLIPS GUIDE

## ICD-10 Codes

DIABETES - TYPE I		DIABETES - TYPE II	
(1 = OD, 2 = OS, 3 = OU)		(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

### VITREOUS/RETINA

(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/Floater	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		

# ECLIPS GUIDE

## ICD-10 Codes

### LIDS/LACRIMAL

(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

CONJUNCTIVA (1 = OD, 2 = OS, 3 = OU)		CORNEA (1 = OD, 2 = OS, 3 = OU)		IRIS (1 = OD, 2 = OS, 3 = OU)		LENS (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)	Conjunctivochalasis	H16.01 (1, 2, 3)	Corneal Ulcer - Central	H57.05 (1, 2, 3)	Tonic Pupil	Z96.1	Pseudophakia
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				

# ECLIPS GUIDE

## ICD-10 Codes

### 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