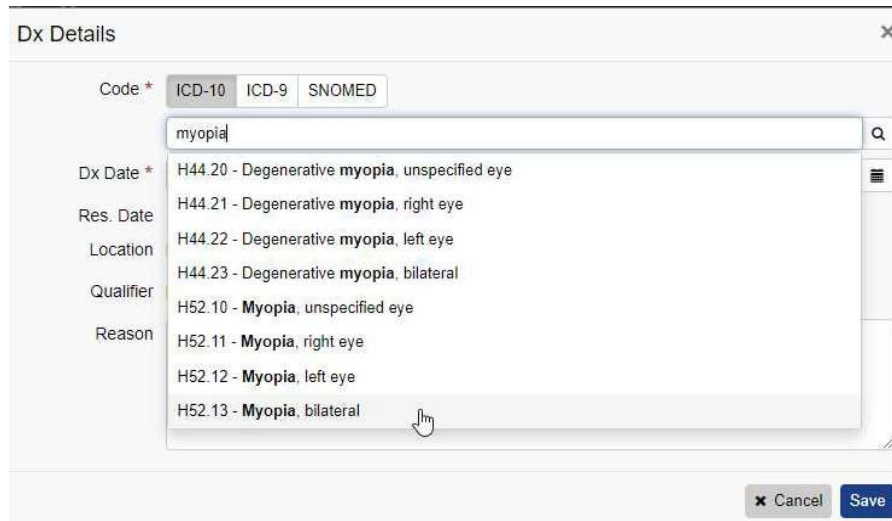


RevolutionEHR Skills Check – Front Desk

1. Add 3 test patients to the **Practice & Training location** in RevolutionEHR – use ‘Test’ as their last name! Make up all the other demographic data to your liking.
 - Schedule your test patients on any day/any time in the week of August 22nd for a Comprehensive Exam. **Be sure to schedule them in the Practice & Training location!**
 - Reschedule 2 of your test patients to the following Monday in the **Practice & Training location**
 - Cancel the 3rd test patient’s Comprehensive Exam
2. Your 3 test patients’ demographic and insurance data need to be updated. Follow the steps listed below:
 - Update a test patient’s address to 4567 Summer Street, Madison, WI 53716. Add Eyemed as the patient’s vision insurance – add the fee schedule that may apply
 - Update a different test patient’s cell phone number 574-659-1245 – make this their preferred phone number. Add Medicare as the patient’s medical insurance – add the fee schedule that may apply
 - Update the last test patient’s insurance information to include Eyemed as their vision insurance and Medicare as their health insurance – add fee schedules that may apply
 - **Bonus: Practice scanning a test document to each test patient – upload to the HIPAA consent, found in the Consents menu within the patient file**
3. Next, you will be scheduling and starting appointments for different encounter types for your 3 test patients, follow the steps below:
 - Schedule your first test patient for a Comprehensive Exam on **TODAY’S** date in the **Practice & Training location**. *Start this encounter from the Schedule Module.*
 - Schedule your second test patient for a Glaucoma Encounter on **TODAY’S** date in the **Practice & Training location**. *Start this encounter from the Schedule Module.*
 - Schedule your third test patient for an Office Visit on **TODAY’S** date in the **Practice & Training location**. *Start this encounter from the Schedule Module.*

4. For training purposes, you will learn about the Assessment & Plan, Coding, and Check-Out workflow steps within an encounter. This will be helpful when doctors/technicians forget or do not have time to enter diagnoses or coding which is needed for check-out. Medical check-outs are done in RevolutionEHR, whereas comprehensive & other products/services are done through Ciao!

- From the Schedule Module, locate your test patient in which you scheduled the Comprehensive Exam for. Hyperlink into that encounter by single-clicking the appointment slot, and selecting the blue underlined hyperlink labeled Comprehensive Exam
- Navigate to the Assessment & Plan workflow step; you'll notice there's no diagnosis listed
- Add Myopia as a diagnosis
- Select the + button (3rd one from top to bottom)
- Type Myopia, select 'Myopia, bilateral'
- Select Save



- Navigate to the Coding workflow step. You need to add the comprehensive exam code (just use 92014 for this example), the refraction, and the standard CL eval established code. These codes can be found to the right in the Common Services. To add them, select the green + button next to the service (see picture on next page)

| Common Services Today's Dx Master Dx | | |
|---|--------------------------------------|---|
| Bulk Add | | |
| <input type="checkbox"/> Code | Description | |
| <input type="checkbox"/> S0620 Routine Exam w/ Refraction NEW | S0620 Routine Exam w/ Refraction NEW | + |
| <input type="checkbox"/> S0621 Routine Exam w/ Refraction EST | S0621 Routine Exam w/ Refraction EST | + |
| <input type="checkbox"/> 92002 | INTERM. OPHTH. SERVICE, NEW PT | + |
| <input type="checkbox"/> 92004 | COMP. OPHTH. SERVICE, NEW PT | + |
| <input type="checkbox"/> 92012 | INTERM. OPHTH. SERVICE, EST PT | + |
| <input type="checkbox"/> 92014 | COMP. OPHTH. SERVICE, EST PT | + |
| <input type="checkbox"/> 92015 | REFRACTION | + |
| <input type="checkbox"/> S9986 - Screening Retinal Photos | S9986 - Screening Retinal Photos | + |
| <input type="checkbox"/> 92250 | FUNDUS PHOTOGRAPHY | + |

- Now that you've added the services, you need to attach your diagnosis to the services. Select Today's Dx (next to Common Services)
- Select the green + button next to Myopia
- Select All Services
- Select your Next button at the bottom of the screen to navigate to the Check-Out workflow step
- Since everything EXCEPT medical check-outs will be done in Ciao!, you will need to keep a clean RevolutionEHR environment when it comes to non-medical exams. Navigate through the screens in the Check-Out workflow step until you reach the Billing screen. Make sure your service codes have a diagnosis attached (this should have been done in the previous steps), then you can assign charges to the appropriate payer – bulk add all the charges at once to add to the Eyemed insurance

| Billing | | | | | | | | | | | | | | | | | |
|---|--|---|-------|--|------------------------------|----------|---|------------|---------|---|------------------------------|---------|---|--------------|-----------------|--|--|
| Billable Items | | Payers/Invoices | | | | | | | | | | | | | | | |
| Unassigned Assigned | | + Create Invoice | | | | | | | | | | | | | | | |
| Bulk Assign | | Approval # Payer Name Balance | | | | | | | | | | | | | | | |
| ASSIGN TO Test, Test EyeMed Vision Care (Primary Vision) <input checked="" type="checkbox"/> 92015 <input checked="" type="checkbox"/> 92310 - CL Standard Eval EST | | Test, Test N/A EyeMed Vision Care (Primary Vision) N/A | | | | | | | | | | | | | | | |
| | <table> <tr> <th>Description</th><th>Price</th><th></th></tr> <tr> <td>COMP. OPHTH. SERVICE, EST PT</td><td>\$150.00</td><td>+</td></tr> <tr> <td>REFRACTION</td><td>\$39.00</td><td>+</td></tr> <tr> <td>92310 - CL Standard Eval EST</td><td>\$50.00</td><td>+</td></tr> <tr> <td>Total</td><td>\$239.00</td><td></td></tr> </table> | Description | Price | | COMP. OPHTH. SERVICE, EST PT | \$150.00 | + | REFRACTION | \$39.00 | + | 92310 - CL Standard Eval EST | \$50.00 | + | Total | \$239.00 | | |
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| COMP. OPHTH. SERVICE, EST PT | \$150.00 | + | | | | | | | | | | | | | | | |
| REFRACTION | \$39.00 | + | | | | | | | | | | | | | | | |
| 92310 - CL Standard Eval EST | \$50.00 | + | | | | | | | | | | | | | | | |
| Total | \$239.00 | | | | | | | | | | | | | | | | |

- Select the underlined hyperlink to open the invoice that was just created for Eyemed. Mark the invoice as Authorized to begin receiving payment. **Make sure your fee schedule is listed on the invoice!**
 - Select receive payment, enter a payment amount (the entire balance due)
 - Select the Apply in Full checkbox and enter a Payment Method
 - Select Apply Payments in the bottom right
 - Navigate to the Final Check-Out screen and select Complete Encounter
5. Let's repeat the exact same thing, except instead of a comprehensive exam check-out, you will be doing a medical check-out. Start with the glaucoma encounter.
- Hyperlink into the encounter and navigate to the Assessment & Plan workflow step. Add H40.013 (Open angle with borderline findings, low risk, bilateral) as your diagnosis
 - Navigate to the Coding workflow step, add a 92083 and 99213 as your services and attach the diagnosis to the services
 - Navigate to the Billing screen, bulk add your services to the medical insurance. For this instance, your patient will have a \$20 copay. Open your insurance you've just created. **Check to make sure the fee schedule is applied** – it will be listed on the invoice
 - Select **Transfer Items** on the invoice
 - Select a **Transfer Reason**, you can use the copay reason
 - On the first line item, enter 20.00 in the Transfer column
 - Select Save at the bottom. You've now completed the medical invoice! Please close the invoice, using the Close button at the bottom
 - You should now see your patient has a new invoice created for \$20. Open that invoice and receive payments like normal by authorizing the invoice, selecting Receive Payment, entering the Payment Amount, checking the Apply in Full checkbox, and entering a Payment Method, and finally selecting Apply Payments. *You have successfully collected the copay and made two invoices! One for insurance, and one for the patient if they would need a copy*
 - Navigate to your Final Check-Out screen and complete the encounter
6. Final Challenge! For the last test patient, complete the entire check-out on your own following these guidelines:
- Add a diagnosis of H10.413 (giant papillary conjunctivitis, bilateral)
 - Add a level 4 E/M code for an established patient (don't forget to attach your diagnosis!)
 - The patient has a \$30 copay
 - Complete the encounter