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Training

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Click here to be redirected to the RevolutionEHR Help Center for step-by-step Directions.

REVOLUTION EHR TRAINING

Welcome to RevolutionEHR Implementation! In a separate email or live call, you will have been provided your training plan which consists of completing your Google Classroom and then logging into the Training & Practice environment in RevolutionEHR to practice what you've learned. In addition, there will likely be a a Q&A call prior to your integration but it is important that you plan time for you and your team to learn RevolutionEHR basics prior to your go-live date.

Google Classroom will always have the most up-to-date information. This document outlines a lot of the information that is provided to you in your Google classroom as is intended to be a back up to the Google Classroom if access issues arise. In this document, for all videos, move your curser on top of the video and a play icon will show up for you to click to begin the video. If you see a graphic of the PDF, double click to open in Adobe.

If you haven't already, be sure to bookmark RevolutionEHR: https://revolutionehr.com/static/. Recommended browsers for running RevolutionEHR: Google Chrome, Microsoft Edge.

Please utilize our help email specifically created to help Team Vision offices regarding RevolutionEHR support: help@revolutionehr.com and/or reference the help center built into RevolutionEHR.

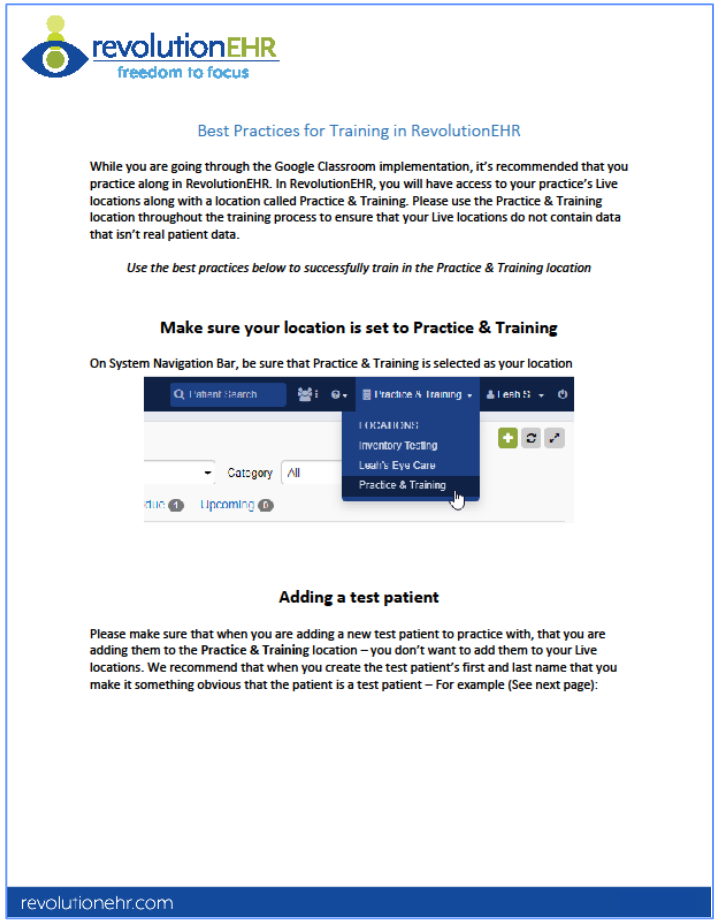
NEW USER OVERVIEW

All Staff & ODs

PRACTICE & TRAINING ENVIRONMENT

CLICK HERE to watch the **New User Basics** video
CLICK HERE to watch **A Patient Encounter** video

CLICK HERE to open
PDF Attachment A



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Best Practices for Training in RevolutionEHR

While you are going through the Google Classroom implementation, it's recommended that you practice along in RevolutionEHR. In RevolutionEHR, you will have access to your practice's Live locations along with a location called Practice & Training. Please use the Practice & Training location throughout the training process to ensure that your Live locations do not contain data that isn't real patient data.

Use the best practices below to successfully train in the Practice & Training location

Make sure your location is set to Practice & Training

On System Navigation Bar, be sure that Practice & Training is selected as your location

Inventory Testing
Leah's Eye Care
Practice & Training

Adding a test patient

Please make sure that when you are adding a new test patient to practice with, that you are adding them to the **Practice & Training** location – you don't want to add them to your Live locations. We recommend that when you create the test patient's first and last name that you make it something obvious that the patient is a test patient – For example (See next page):

revolutionehr.com

PRACTICE MANAGERS & SYSTEMS ADMIN

Add Employees, Merge Patient Files, Password Re-set

RESOURCES

Click the links below to learn about various topics:

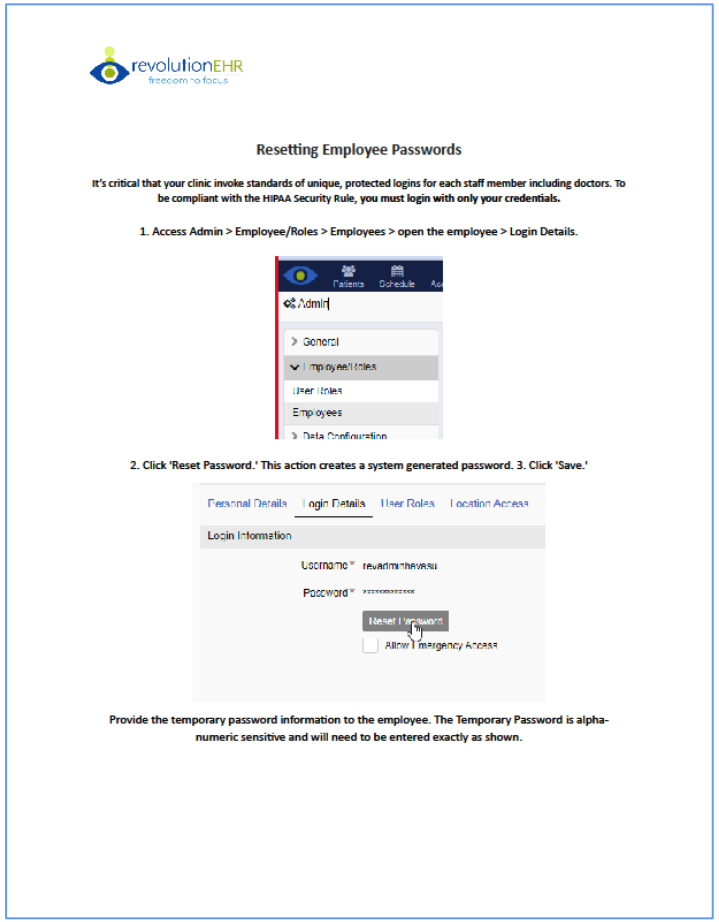
[Add New Employee Video]

[Add New Employee PDF]

[Add Provider Signature]

[Merge Patient Files]

[CLICK HERE] to open PDF Attachment B



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Resetting Employee Passwords

It's critical that your clinic invoke standards of unique, protected logins for each staff member including doctors. To be compliant with the HIPAA Security Rule, you must login with only your credentials.

1. Access Admin > Employee/Roles > Employees > open the employee > Login Details.

2. Click 'Reset Password.' This action creates a system generated password. 3. Click 'Save.'

Provide the temporary password information to the employee. The Temporary Password is alpha-numeric sensitive and will need to be entered exactly as shown.

PATIENT HEALTH PORTAL

PHR

PATIENT PORTAL

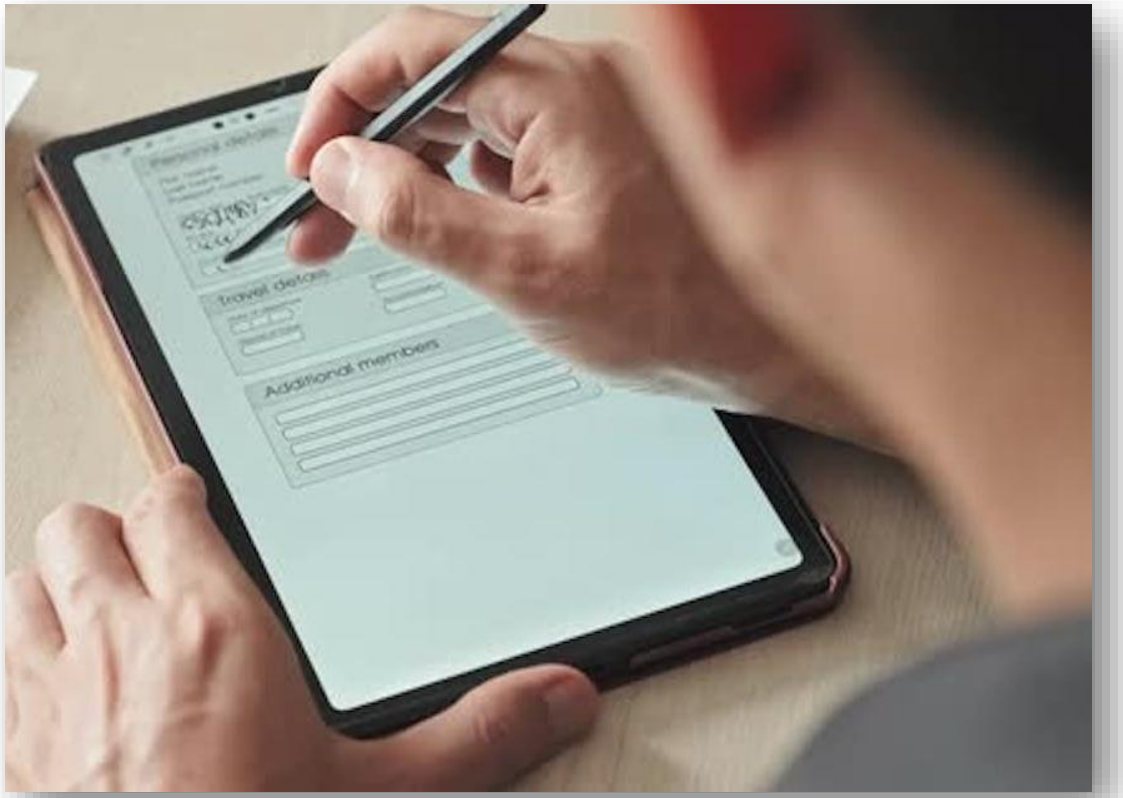
It’s a great way to communicate, share information, and get medical information ahead of time to pre-chart. Patients will also be able to see prescriptions, appointments, and more!

Click the links below to learn more about the patient portal:

[Revolution PHR Credentials]

[Inside the Patient Portal]

[PHR PDF’s]



FRONT DESK

Scheduling, Check In, Tasks, & More

FRONT DESK RESOURCES

CLICK HERE to watch a Schedule Overview video

Click the links below to learn about various topics:

All Scheduling Training Videos & PDF's

RevolutionEHR Terminogy

Patient Summary

Demographics

Family/Contacts Component

Tasks

Search Tasks

Uncomplete Task Report

Messages

Schedule Appointments, Busy Time,

Office Closed

Schedule Filters

Wait List

Status Icons

Patient Insurance

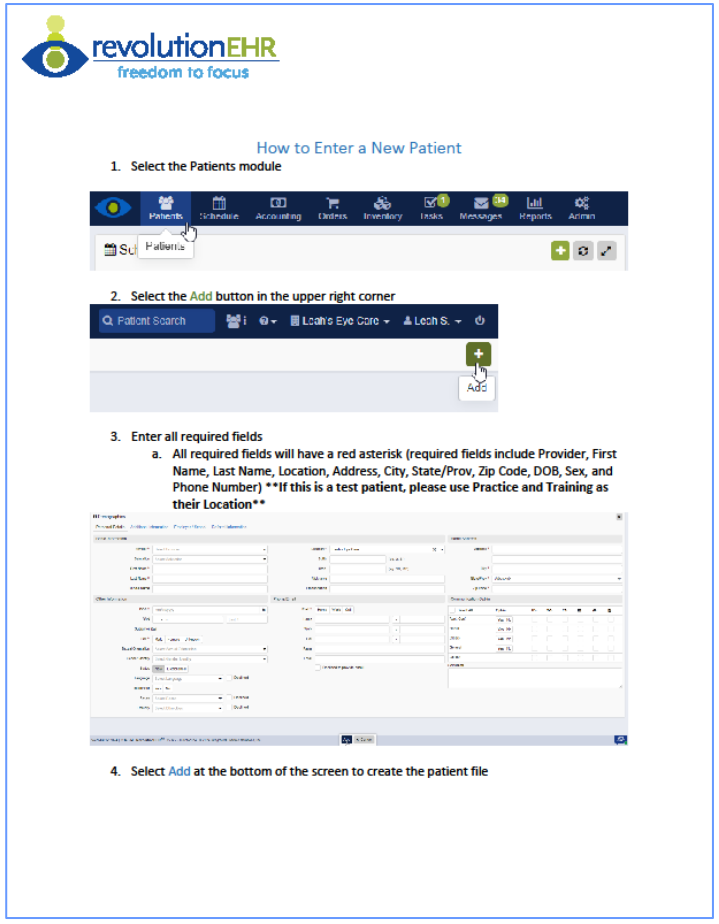
Patient Check In

Patient Dashboard Buttons

What Does and Asterisk Mean?

HELPFUL PDF's

CLICK HERE to open PDF Attachment C



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How to Enter a New Patient

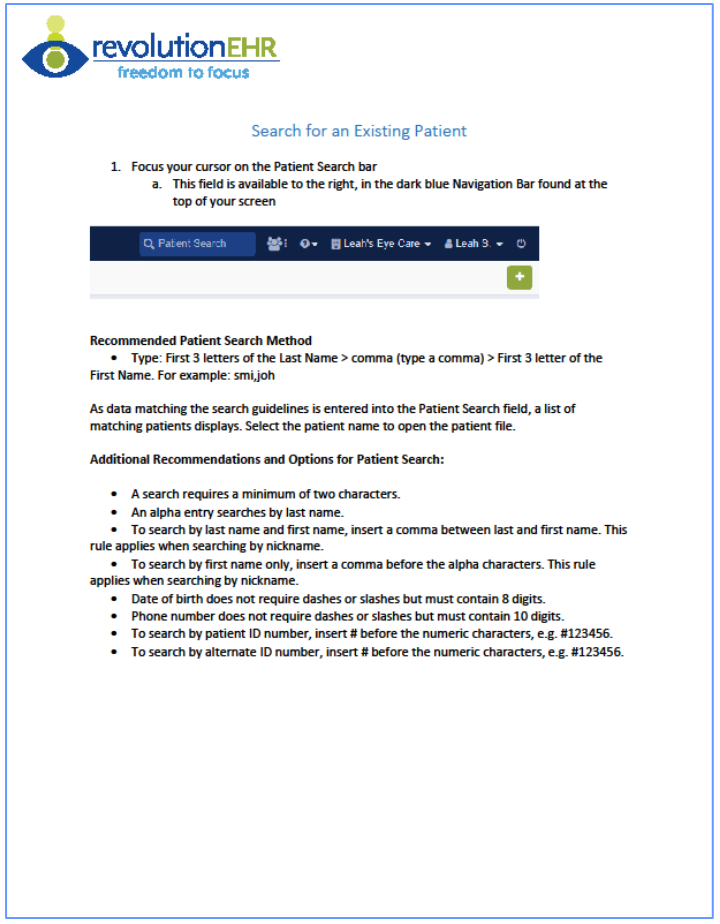
1. Select the Patients module

2. Select the Add button in the upper right corner

3. Enter all required fields
   a. All required fields will have a red asterisk (required fields include Provider, First Name, Last Name, Location, Address, City, State/Prov, Zip Code, DOB, Sex, and Phone Number) **If this is a test patient, please use Practice and Training as their Location**

4. Select Add at the bottom of the screen to create the patient file

CLICK HERE to open PDF Attachment D



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Search for an Existing Patient

1. Focus your cursor on the Patient Search bar
   a. This field is available to the right, in the dark blue Navigation Bar found at the top of your screen

Recommended Patient Search Method

- Type: First 3 letters of the Last Name > comma (type a comma) > First 3 letter of the First Name. For example: smi,joh

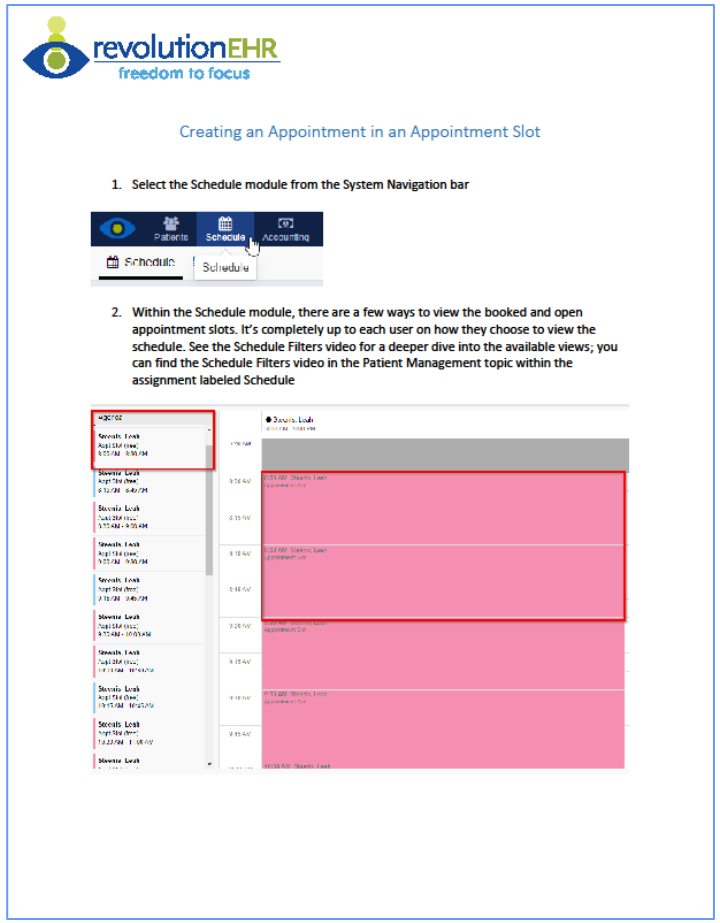
As data matching the search guidelines is entered into the Patient Search field, a list of matching patients displays. Select the patient name to open the patient file.

Additional Recommendations and Options for Patient Search:

- A search requires a minimum of two characters.
- An alpha entry searches by last name.
- To search by last name and first name, insert a comma between last and first name. This rule applies when searching by nickname.
- To search by first name only, insert a comma before the alpha characters. This rule applies when searching by nickname.
- Date of birth does not require dashes or slashes but must contain 8 digits.
- Phone number does not require dashes or slashes but must contain 10 digits.
- To search by patient ID number, insert # before the numeric characters, e.g. #123456.
- To search by alternate ID number, insert # before the numeric characters, e.g. #123456.

HELPFUL PDF's

CLICK HERE to open
PDF Attachment E



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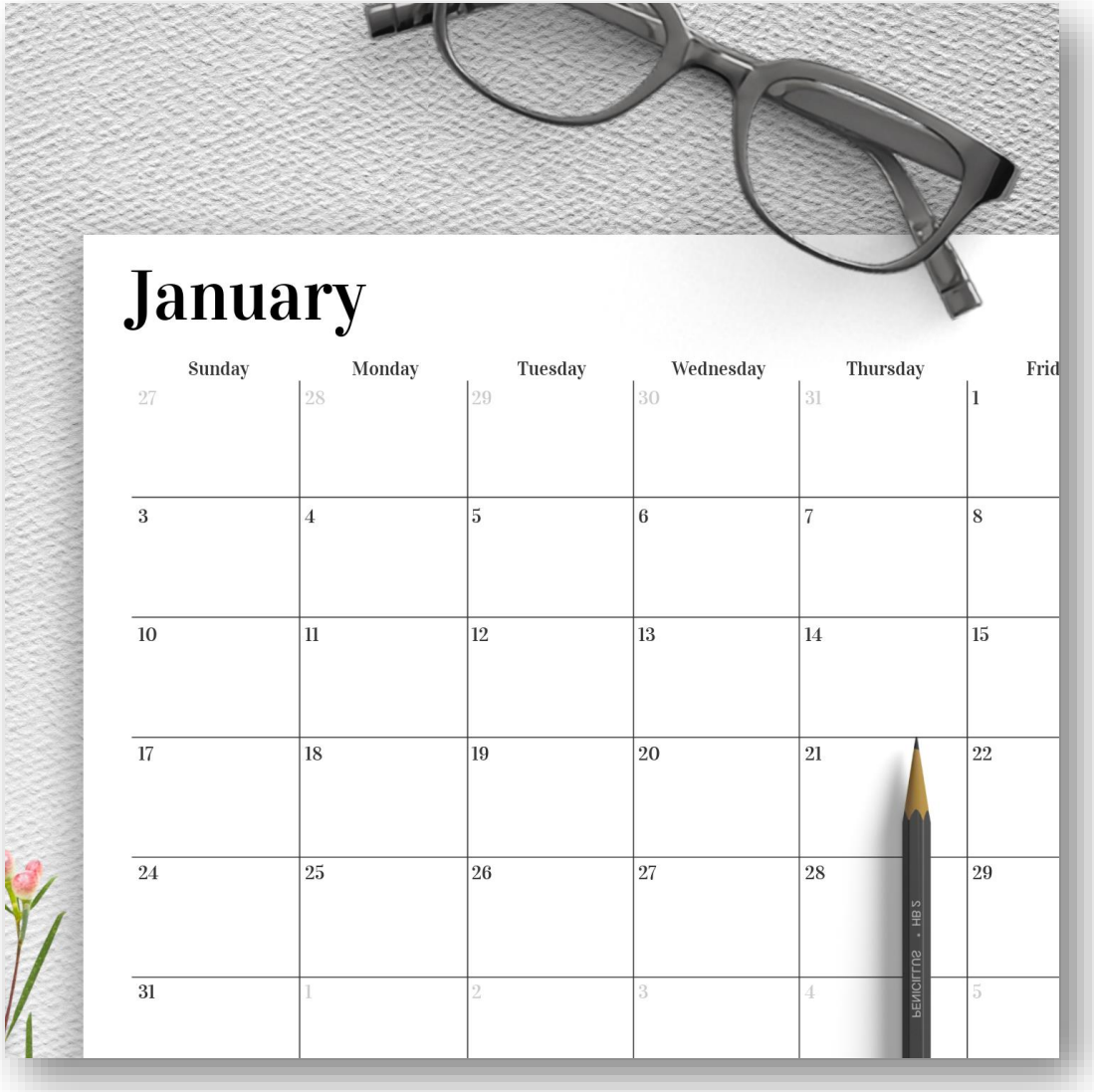
Creating an Appointment in an Appointment Slot

1. Select the Schedule module from the System Navigation bar

2. Within the Schedule module, there are a few ways to view the booked and open appointment slots. It's completely up to each user on how they choose to view the schedule. See the Schedule Filters video for a deeper dive into the available views; you can find the Schedule Filters video in the Patient Management topic within the assignment labeled Schedule



CHECK OUT
Invoicing

CHECK OUT RESOURCES

Click the links below to learn about Invoicing:

Invoicing Guide (PDF)

Adding Insurance (Video)

Routine Vision Insurance (Video)

Medical Vision Insurance (Video)

Cash Pay (Video)

Guarantor vs. Head of Household

SKILLS CHECK

Scheduling, Check In, & Check Out

SKILLS CHECK

Use this PDF as a guide to practice your RevolutionEHR skills!

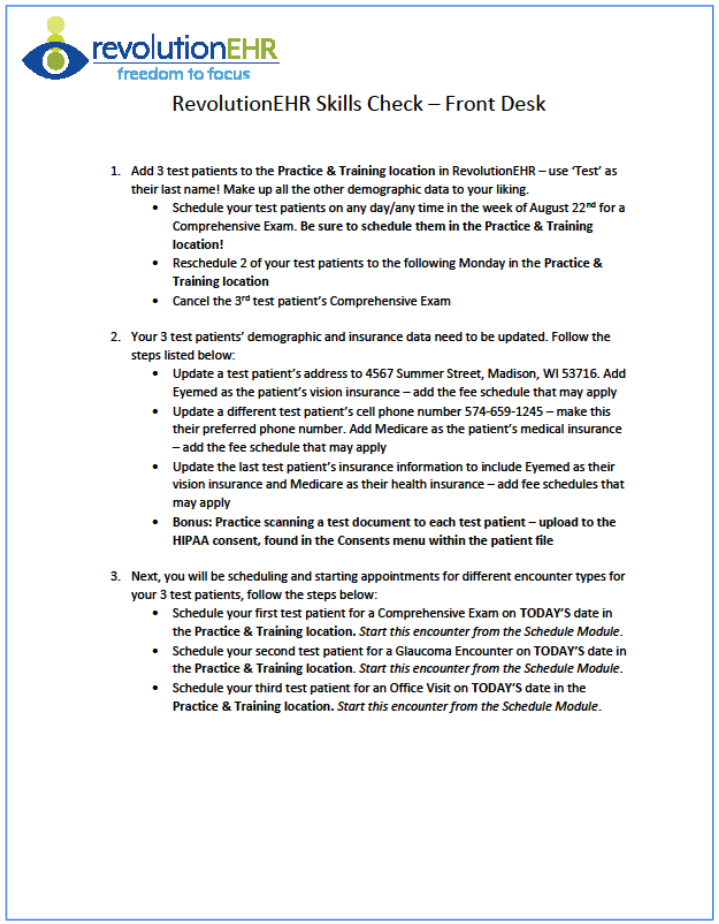
Note:

If the Encounter Templates do not match exactly what you have in your environment, do your best to choose the closest fitting Template.

- For example, if the PDF says to schedule a Glaucoma Encounter and your office doesn't have that as an option, I recommend selecting the Special Testing encounter instead.

Once completed, keep practicing your skills with the OD services your practice most often sees!

CLICK HERE to open PDF Attachment F



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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.*

OPTOMETRIST & TECHNICIAN

Patient Care

NAVIGATING THE PATIENT ENCOUNTER

The following series of videos will break down important screens in the patient encounter. This series will also include a video about Communication Templates - this is how you will create patient letters, letters for external providers, etc.

Click the links below to access videos & PDF's.

Reason for Visit (RVF)

History of Present Illness (HPI) and Review of Systems

Medications

Allergies

Comprehensive Visual Testing and Optical

Assessment, Plan & Coding Generate Communication Templates

Auto Coding

Create an Eyeglass Prescription

Contact Lens History & Evaluation Video

Create a Contact Lens Prescription PDF

Create a Contact Lens Trial PDF

Contact Lens Trials and Rx Video

Balance Lens

Re-authorize an Expired Rx

View a Canceled Rx

NAVIGATING THE PATIENT ENCOUNTER

Click the links below to access videos & PDF's.

Pull-Forward Quick Guide

Test Efficiencies

Multiple Rx Quick Guide

PFSH Mood and Related Conditions

Ongoing Care, Referrals, and Surgery

Drawing Tool

List of available tests that can added to Encounters

RevImaging Orientation

RevImaging Features

RevImaging Viewer

RevImaging Icons & Functions

RXNT:

What is RxNT? RXNT is an integration which allows providers to e-prescribe from within RevolutionEHR.

New site integrations, a TeamVision Ops manager will provide additional details regarding the specific steps your OD must take to enroll.

Click HERE if your practice will be using RXNT.

REV IMAGING:

RevImaging is a cloud-based image management solution within RevolutionEHR that simplifies the storing, viewing and comparing of multiple images for more precise disease progression analysis and clinical decision making while also enhancing patient education.

HELPFUL PDF's

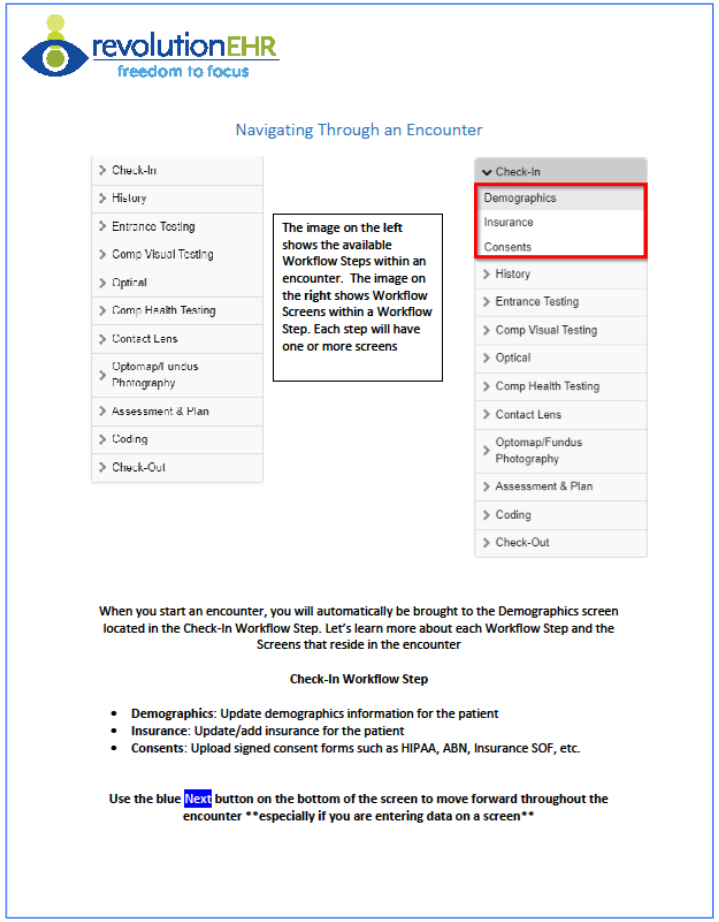
Use the PDF on the right to learn how to navigating through an encounter.

- To follow along, open a test patient and schedule them for a comprehensive encounter for today's date in the Practice & Training location.
- Start the encounter and open the PDF.

Key takeaways from this PDF:

- Identifying Workflow Steps and Screens
- Information and descriptions on what can reside on screens
- Helpful tips and callouts for more efficient data entry
- Screen shots of key areas throughout
- Data entry practice

CLICK HERE and HERE to open
PDF Attachments G



OD & TECH SKILLS CHECK

Quizzes

SKILLS CHECK

Click here for the answer Key

Encounter 1

1. Dx/CPI Reasons for visit is a tool that can be used to view past diagnosis codes and the care plans associated to them? True or False
2. Which of the following statements is true as it relates to saving data within the encounter?
    - Click ‘save’ button in the lower right-hand corner
    - Close the encounter to save
    - Navigate to another screen by hitting next (the blue arrow) or choose a different screen within the encounter
3. Will all encounter types have the same layout? Yes or NO
4. You do not have the ability to add a test on the fly within an encounter? True or False
5. Diagnosis codes can be added to ‘todays diagnosis’ list within the assessment screen by:
    - Selecting from ‘today’s findings’
    - Selecting from ‘Master Dx’
    - Selecting the ’+’ button
    - All of the above
6. The coding screen is used to indicate the CPT codes that represent the services provided. True or False

SKILLS CHECK

Click here for the answer Key

Encounter 2

1. In the Contact Lens screen, which of the following functions are available?
    - Add contact lens trials
    - Create and authorize contact lens prescriptions
    - Delete contact lens trials
    - All of the above
2. Of the following fields, which is a requirement when entering a referral?
    - Appt Booked
    - Comments
    - Reason
    - Response date
3. The Orders Medical pod can be found within
    - The patient summary
    - The show more menu
    - Diagnosis history
    - Both A & B
4. RevolutionEHR allows you to draw ocular findings? True or False
5. Ongoing care can be used to view pertinent data related to Refractive and Glaucoma Care? True or False

SKILLS CHECK

Click here for the answer Key

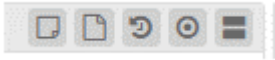
Final Exam (two slides)

1. Which of the following statements is true?
   - The pull forward button will pull forward the patient's last exam into today's encounter?
   - The pull forward buttong will allow you to select a previous exam to pull forward into today's encounter?
2. Will the 'No Changes' button in the ROS screen pull forward the ROS only from the most recent encounter? Yes or No
3. You should add a new general medication on the fly without thoroughly check the existing options? Yes or No
4. HPI can be generated by:
   - Selecting the HPI Dx History Button
   - Selecting the '+' button to create an HPI from scratch
   - Selecting the HPI Wizard button
   - All of the above
5. All diagnoses listed in 'Todays Diagnosis' in the assessment screen will be listed in the plan screen? True or False
6. Both Technicians and Doctors have the ability to sign an encounter? True or False
7. If the necessary CPT code is not displayed in the Common Services, you can manually add the service by:
   - Selecting the '+' button
   - Manually adding the service into the common service list
   - There is no option other than the existing common service

SKILLS CHECK

Click here for the answer Key

Final Exam (two slides)

8. To add a surgery into the surgery history component, click on the 'X' in the upper right corner? True or False
9. After you 'Save' a medical order, changes to the Medical Order cannot be made? True or False
10. Which of the following options is NOT a button the test header? Reference this image: 
    - Notes
    - File Upload
    - Normal
    - Save
    - Test History
    - OD=OS

PROVIDERS

Care Plans & Templates

CARE PLANS

Care Plan Items are items that are discussed with the patient during their encounter - think of these as documenting your plan with the patient!

Care Plan Items are organized into the following categories:

- **General:** Anything that does not fall into any of the other categories.
- **MedRx:** A list of all medications prescribed by a provider in the practice. Defaults can be set for details related to a prescription. When an encounter is signed, a MedRx Care Plan triggers a pending medication prescription for that patient. If you plan to use RXNT integration, it is recommended you do not build a MedRx library in this area. Creating a prescription in RXNT automatically pushes that prescription into the patient's medication list.
- **Education:** A list of all education items provided to the patient. This includes verbal, paper, or electronic forms of education.
- **Recall:** This is a list of every possible recall combination of duration and encounter type. Recalls are associated to a specific encounter template, thus, it is recommended you do not configure your recall care plan items until you have named all of your encounter templates.
    - Examples: One-year comprehensive encounter, One week CL check, Six month CL check, etc.
- **Orders - Medical:** A list of medical orders that may be created for a patient. Defaults for specific details about the order can be setup. When an encounter is signed, an Orders - Medical care plan item triggers a new medical order.
- **Goal:** Used for setting goals for the patients. Connected to SNOMED codes.

Please review the Care Plan Items by clicking HERE. **You will work with your Enterprise Team, Ali & Leah, to build your Care Plan Item library to make documenting the Assessment and Plan a breeze.**

HELPFUL PDF's

Care Plan Templates are groups of Care Plan Items that function similarly to provide a concise plan of action regarding a diagnosis.

CLICK HERE to open PDF Attachment H

Attached is an example of the best way to organize your Care Plan Templates

- Use/edit this document a guide
- Once completed, send to help@revolutionehr.com

CLICK HERE to open PDF Attachment I

After reviewing the list of suggested Care Plan Items, and reviewing the document of Care Plan Template suggestions, the providers need to generate a list of Care Plan Items and Care Plan Templates and send those to **help@revolutionehr.com** (Leah & Ali).

- You can send the list in any format (i.e., a Word document, Excel file, etc.)
- These Care Plan Items and Templates must be agreed upon by ALL providers
- Please only send Leah and Ali one list of Care Plan Items and Templates

APPENDIX

Scenarios & Answer Keys

SCENARIOS

Patient Demographics: (if you need additional patients, use your favorite actor, animal, reality start, etc.)

Paul E. Carbonate 1234 Eyeglass Way Your City, State, Zipcode (619)987 6543 Pcarbonate@gmail.com	Elmo Smith 1234 Main St. Your City, State, Zipcode (619)222 3434 Esmith@gmail.com	Burt Cook 1234 Sesame St. Your City, State, Zipcode (619)333 4545 Bcook@gmail.com	Elvis Castillo 1234 Guitar St. Your City, State, Zipcode (619)444 5656 ECastillo@gmail.com

Activities to complete in the Practice & Training environment with the patient demographics above:

Paul E. Carbonate

- Schedule a routine eye exam for Paul E. Carbonate for three weeks out. Add in his BCBS Medical (ID#123456) & VSP (Last 4: 1234) Insurance. Practice explaining to Paul how the patient portal works and locate the area within REV where you would set his access information up.
- Paul called back the next day and wants to reschedule his appointment. He'd like to come in sooner because he got something in his eye at work. Reschedule his appointment for today and change the type of exam from routine to medical.
- Check Paul In. If your scanner is set up, scan in a blank piece of paper with a smiley face on it.
- Ask your technician to work him up. If OD available, have them complete the exam.
    - If not, go directly to coding, add in Procedure code: 65222 (OD), 92250. Diagnosis: T15.00XA, H57.04.
- Complete the invoice and bill 65222 to his medical carrier and 92250 to Paul E. Carbonate.
- Have a peer review your invoice for accuracy.

SCENARIOS

Use the patient demographics & Scenarios to practice various patient encounters:

Elmo Smith

- Add Elmo Smith to your wait list.
- You've had a cancelation and can get Elmo in today. Schedule an established patient comprehensive contact lens exam for Elmo Smith for today. Manually mark the appointment as confirmed.
- Add in insurance: BCBS Medical (ID#123456) & VSP (Last 4: 1234). Print the patient information/routing slip.
- Check Elmo In. If your scanner is set up, scan in a blank piece of paper with a smiley face on it.
- Ask your technician to work the patient up as they would normally for a comprehensive contact lens exam.
- If OD available, have them complete the exam and print the Rx & trial information needed.
- If not, go directly to coding, add in Procedure code: 92014, 92015, 92310 and Optomap. Diagnosis: H52.1, H52.4.
- Create invoice. Apply VSP and charge patient out of pocked for Optomap. Have a peer review your invoices for accuracy.
- Schedule next years appointment. Change their preferred method of communication.

Burt Cook

- Schedule a glaucoma visit for today.
- Add in a medical insurance of your choice.
- Check Burt In. At check in, he mentions that he is locked out of his patient portal. Re-set his password.
- Ask Tech & OD to work up patient.

SCENARIOS

Use the patient demographics & Scenarios to practice various patient encounters:

Burt Cook (cont'd.)

- If OD available- complete referral letter and mock scan/email to referring provider.
- If OD unavailable, go directly to coding, add in Procedure code: 99214 and Optomap. Diagnosis: H40.1112.
- Bill the Optomap to Burt & 99214 to the insurance carrier.
- Have a peer review your invoice.
- Schedule a follow up appointment for 6 months.

Elvis Castillo

- Your choice! Think about the type of exams you most frequently see in the practice and ensure you are confident in the Check In, Patient Encounter, and Check Out processes.

SKILLS CHECK ANSWER KEY

Encounter 1

1. Dx/CPI Reasons for visit is a tool that can be used to view past diagnosis codes and the care plans associated to them? **True** or False
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   - Add contact lens trials
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   - Appt Booked
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   - **Reason**
   - Response date
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   - The show more menu
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   - **Both A & B**
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    - Notes
    - File Upload
    - Normal
    - **Save**
    - Test History
    - OD=OS

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