

# RevolutionEHR

## Invoicing Guide

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Click [HERE](#) to access the Patient Journey for invoicing videos!

# ADD INSURANCE

## RevolutionEHR

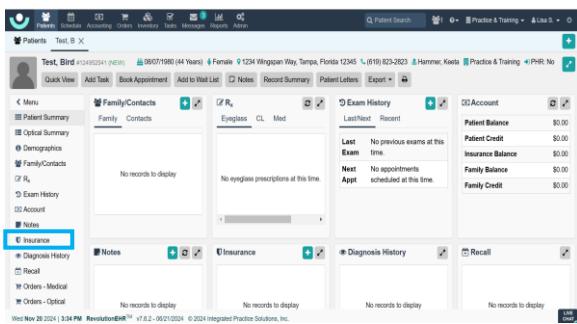


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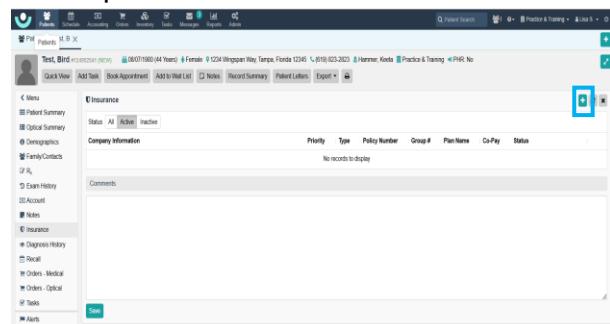
Follow these steps to add insurance into a patient profile in RevolutionEHR.

- There are multiple ways to access the insurance screen (from the schedule pod, searching the patient, or at check in/via the encounter. Find the way that works best for you!)
- The directions below will walk you though how to enter insurance after the patient has been pulled up. Step 2 & 3 will not change despite how you access the insurance screen.

1 Once the patient is pulled up, Click **insurance** from the navigation bar on the left side of the screen.



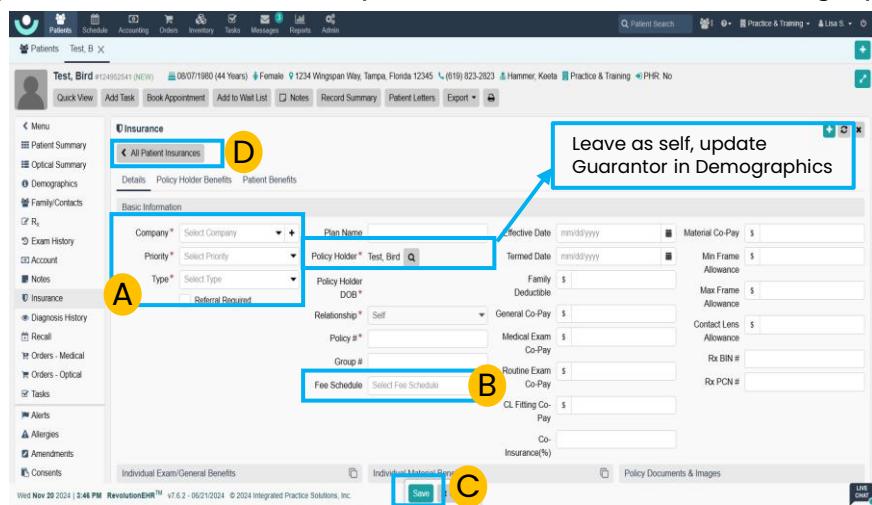
2 Click the + icon on the right side to add an insurance plan.



3 A,B,C: Enter the minimal information required, anything with an \* and the **fee schedule** and click **Save** on the bottom to save the information you just entered.

D: To enter a second insurance carrier, click **all patient insurances** to get back to the entry screen and click the + on the right side to enter a new plan.

- Enter both primary & secondary medical carriers.
  - Enter correct policy number and ID's for all medical carriers.
  - Scan in the front and back of the Insurance Card on the insurance tab
- Enter routine vision carrier & mark as primary vision carrier.
- In both cases, it will default to "self" as the primary insured, even if they are not the policy holder, leave as "self". Update the **Guarantors** in Demographics section.



**Tip:** You can enter additional details by scrolling down on the page and it will print on your routing/fee slip!

# MEDICAL INSURANCE

## RevolutionEHR



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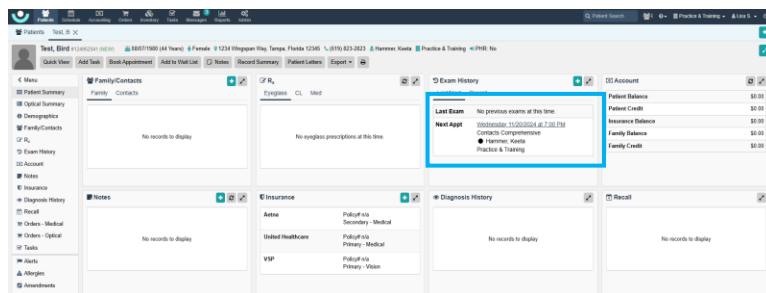
Follow these steps to check out/invoice a routine vision insurance carrier. RevolutionEHR will bill all medical carriers.

### Important notes:

- Always check TriZetto for patient copays and deductibles ahead of time.
- An insurance balance will be left on the account. There are no patient balances left in Revolution- you will take and record payment. Failing to record payment will result in a patient statement.
- We DO NOT create invoices for secondary medical carriers.
  - Enter secondary into demographics but do not create an invoice (it will automatically go to secondary once primary billed).
  - If the secondary medical insurance has a copay, this must be collected at the time of service. This would be applied to the primary medical insurance.

1

Click **the encounter** from the navigation bar on the right side of the screen.



2

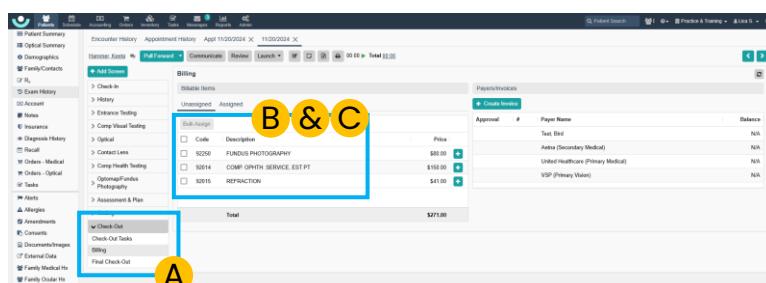
A. the navigation bar within the encounter, click the **check out** tab and go to **billing**.

- If your OD has entered **check out tasks** you must complete those before you go to billing.

B. **Checkmark** the services you'd like to assign to the medical carrier and click **bulk assign** and select your **medical carrier** from the list.

C. If there are services not covered by the medical carrier you will **bulk assign those services to the patient** NOT the medical carrier (i.e., refraction, optomap, contact lens eval., etc.).

**Note:** This will result in the creation of two invoices, one for the patient and one for the medical carrier. You will address both.



# MEDICAL INSURANCE

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3

Bulk Assigning will remove the services from the unassigned list and create a **pending** invoice for you to complete.

- Click the **invoice number** to open the invoice.
- Note- for patient responsibilities and/or copays, you will need to address the patient and medical invoices.

Approval	#	Payer Name	Balance
Pending	266566139	Test, Bird	\$39.00
		Aetna (Secondary Medical)	N/A
Authorized	266530984	VSP (Primary Vision)	\$0.00
Pending	266566125	United Healthcare (Primary Medical)	\$80.00

4

Click **add fee schedule**.

Once the fee schedule is applied it will create an insurance balance which is left on the account.

5

If the patient has a copay, click **transfer items**.

- If there is no copay, you can print/close your medical invoice.

Post Date	Code	Modifiers	Diagnoses	Description	Qty	Unit Price	Discounts	Tax	Ext. Price	Adjustments	Paid	Balance
11/20/2024	65210			FOREIGN BODY REMOVAL, CON. EMBED	1	\$80.00	\$0.00	\$0.00	\$80.00	\$0.00	\$80.00	\$0.00

# MEDICAL INSURANCE

## RevolutionEHR



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- A. On the pulldown bar in the middle, select **coinsurance/copay-amount applied to patient copayment**.
- B. Enter the copay/deductible amount in the transfer box.
- C. Click **save**.

**Notes:**

- Once clicking save, the copay amount will be transferred to the patient invoice and your balance left should decrease.
- **Do not** authorize your medical invoice, leave in pending status.

7

Complete your patient invoice.

8

Transfer services into Ciao!

**Note :**

- You may need to use both the patient and medical invoice to identify ALL services entered into ciao!
- You can print your invoice or write down the plan pay/adjustments/copays on fee schedule.

Transfer Items

Invoice #266566125 for **Test, Bird\***

Code	Description	Qty	Unit Price	Sub-Total	Discounts	Tax	Ext. Price	Transfer	Adjustments	Paid	Balance
65210	FOREIGN BODY REMOVAL, CONJ, EMBED.	1	\$80.00	\$80.00	\$0.00	\$0.00	\$80.00	\$25.00	-\$47.68	\$0.00	\$32.32

A yellow box labeled 'A' highlights the 'Transfer' button in the bottom right of the transfer table. A red box labeled 'B' highlights the 'Adjustments' button in the bottom right of the transfer table. A green box labeled 'C' highlights the 'Paid' and 'Balance' columns in the bottom right of the transfer table.

Invoice from Rev = what to enter in Ciao!

Order Price Calculator

Please complete the claim information to see insurance pricing.

Plan Name: MEDICAL BLUE MEDICARE-TVO NC Type: Assignment

Group #: Plan ID: 1818630

Services	Retail Price	You Pay	Plan Pays	Discount	Copay
99205 E&M LEVEL 5 NEW PT	\$350.00	\$350.00	\$C 00	\$B 00	\$A 00
92250 Fundus Photography	\$95.00	\$95.00	\$S 0.00	% 0.00	\$0.00
ADD-ON ONLY PACKAGE ARTICLE	\$0.00	\$0.00	\$S 0.00	% 0.00	\$0.00
<b>Total</b>	<b>445.00</b>	<b>445.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

Benefit Calculation Notes

# ROUTINE VISION

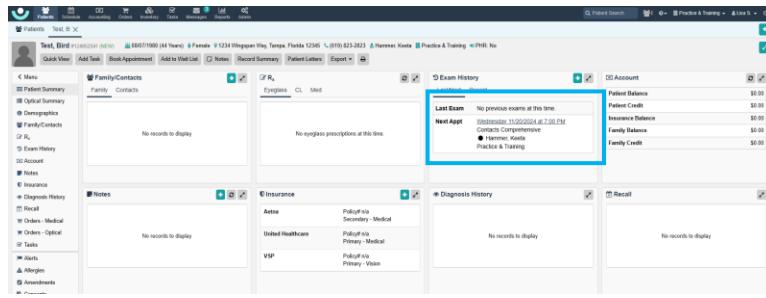
## RevolutionEHR



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Follow these steps to check out/invoice a routine vision insurance carrier. RevolutionEHR will not bill routine vision carriers.

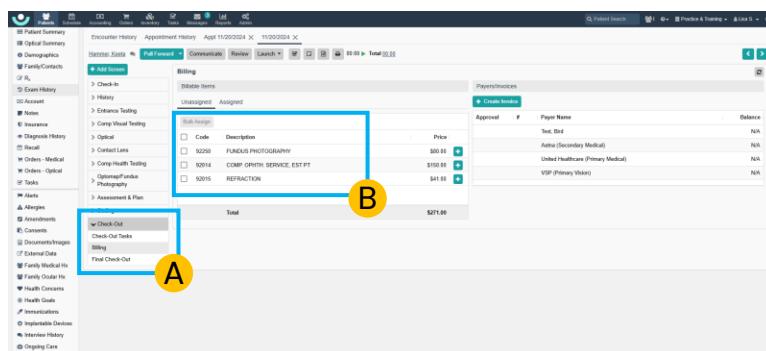
- 1 Click the **encounter** from the navigation bar on the right side of the screen.



- 2 A. From the navigation bar within the encounter, click the **check out** tab and go to **billing**.

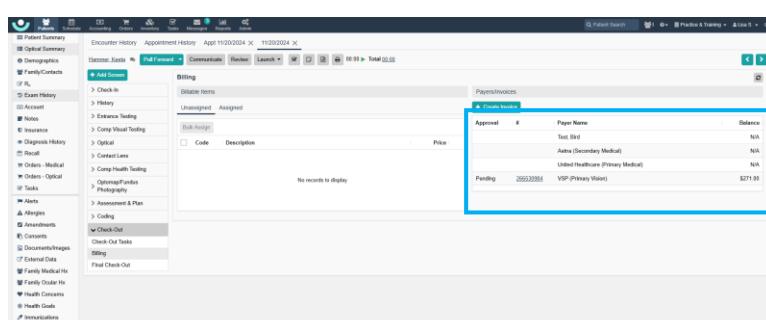
- If your OD has entered **check out tasks** you must complete those before you go to billing.

- 2 B. **Checkmark** the services you'd like to assign to the routine vision carrier and click **bulk assign** and select your **routine carrier** from the list.



- 3 This will remove the services from the unassigned list and create a **pending** invoice for you to complete.

- Click the **invoice number** to open the invoice.



# ROUTINE VISION

## RevolutionEHR



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4 A,B: Click **add fee schedule** to zero out your invoice and click **authorize**.

- There are zero patient balances left in the E.H.R.
- There are zero ROUTINE balances left in the E.H.R. (this is different than medical carriers)

Invoice Details

Insurance: Invoice #2166530984 Practice & Training Kesta Hammer 11/20/2024 (0 days)

Pending  Authorized  Diagnoses  Add Fee Schedule  Transfer Items  Preview Claim

Bill To  
VSP (Primary Visa)

Service Date: 11/20/2024  X

Fee Schedule: None

Fee Date: None

[Details](#) [Additional Claim Info](#) [Claim History](#) [Payment History](#) [Statement History](#) [Documents & Images](#) [Notes](#)

[+ Add](#)

Post Date	Code	Modifiers	Diagnoses	Description	Qty	Unit Price	Discounts	Tax	Ext. Price	Adjustments	Paid	Balance
11/20/2024	92014			COMP OPTH. SERVICE, EST PT	1	\$150.00	\$0.00	\$0.00	\$150.00	\$0.00	\$0.00	\$150.00
11/20/2024	92015			REFRACTION	1	\$41.00	\$0.00	\$0.00	\$41.00	\$0.00	\$0.00	\$41.00
11/20/2024	92250			FUNDUS PHOTOGRAPHY	1	\$80.00	\$0.00	\$0.00	\$80.00	\$0.00	\$0.00	\$80.00

Show All

	SUB TOTAL	\$271.00
	Discounts	\$0.00
	Tax	\$0.00
	TOTAL	\$271.00
	Adjustments	\$0.00
	Payments Received	\$0.00
	<b>BALANCE DUE</b>	<b>\$271.00</b>

x Close

5 Once authorized, confirm the balance due is zero and click the **pencil** to record the invoice as paid.

Insurance Invoice #26653094 ACTIVE Last Bird Practice & Training Keeta Hammer 11/29/2024 (0 days)

Pending Authorized Receive Payment Diagnoses Print

Bill To  
VSP (Primary Vision)
Service Date 11/20/2024
Fee Schedule VSP
Fee Date 11/26/2024

[Preview Claim](#)
[Print Claim](#)
[View Data File](#)

Detail Additional Claim Info Claim History Payment History Statement History Documents & Images Notes

Post Date	Code	Modifiers	Diagnoses	Description	Qty	Unit Price	Discounts	Tax	Ext. Price	Adjustments	Paid	Balance
11/20/2024	92014			COMP OPHTH. SERVICE, EST PT	1	\$150.00	\$0.00	\$0.00	\$150.00	-\$150.00	\$0.00	\$0.00
11/20/2024	92015			REFRACTION	1	\$41.00	\$0.00	\$0.00	\$41.00	-\$41.00	\$0.00	\$0.00
11/20/2024	92250			FUNDUS PHOTOGRAPHY	1	\$80.00	\$0.00	\$0.00	\$80.00	-\$80.00	\$0.00	\$0.00
<span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">SUB TOTAL</span> \$271.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">Discounts</span> \$0.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">Tax</span> \$0.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">TOTAL</span> \$271.00												
<input type="checkbox"/> Show All												

Invoice Details

Insurance Invoice #26653094 Paid Last Bird Practice & Training Keeta Hammer 11/29/2024 (0 days)

Pending Authorized Receive Payment Diagnoses Print

Bill To  
VSP (Primary Vision)
Service Date 11/20/2024
Fee Schedule VSP
Fee Date 11/26/2024

[Preview Claim](#)
[Print Claim](#)
[View Data File](#)

Detail Additional Claim Info Claim History Payment History Statement History Documents & Images Notes

Post Date	Code	Modifiers	Diagnoses	Description	Qty	Unit Price	Discounts	Tax	Ext. Price	Adjustments	Paid	Balance
11/20/2024	92014			COMP OPHTH. SERVICE, EST PT	1	\$150.00	\$0.00	\$0.00	\$150.00	-\$150.00	\$0.00	\$0.00
11/20/2024	92015			REFRACTION	1	\$41.00	\$0.00	\$0.00	\$41.00	-\$41.00	\$0.00	\$0.00
11/20/2024	92250			FUNDUS PHOTOGRAPHY	1	\$80.00	\$0.00	\$0.00	\$80.00	-\$80.00	\$0.00	\$0.00
<span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">SUB TOTAL</span> \$271.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">Discounts</span> \$0.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">Tax</span> \$0.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">TOTAL</span> \$271.00 <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">Adjustments</span> -\$271.00												
<input type="checkbox"/> Show All												

Payments Received BALANCE DUE \$0.00

6 Enter the services into Ciao! Optical! And collect any applicable copays/fees.

# PATIENT INVOICE

## RevolutionEHR



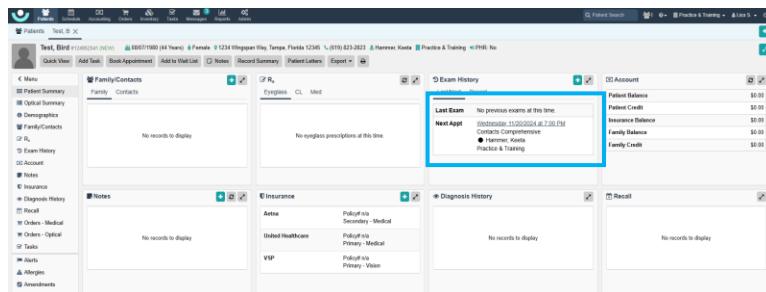
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Follow these steps to check out/invoice a patient.

### Important notes:

- There are no patient balances left in RevolutionEHR- you will take and record ALL patient payment.
- Failing to record payment will result in a patient statement.
- A medical balance will be left on the account (never for routine carriers).

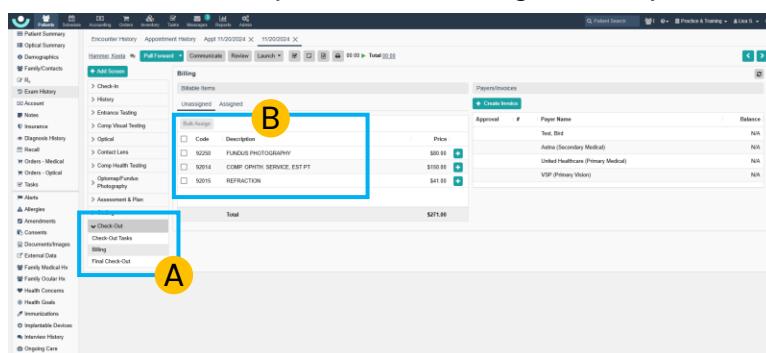
- 1 Click the encounter from the navigation bar on the right side of the screen.



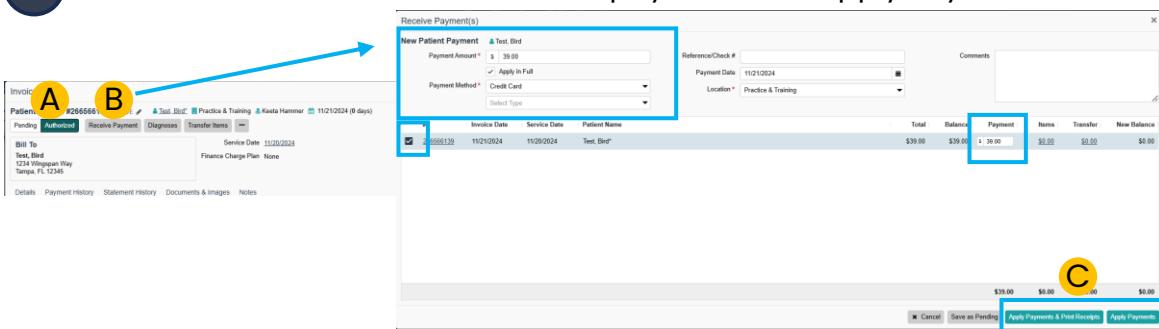
- 2 A. the navigation bar within the encounter, click the **check out** tab and go to **billing**.

- If your OD has entered **check out tasks** you must complete those before you go to billing.

- B. Checkmark the services you'd like to assign to the patient.



- 3 A. Authorize invoice B. Receive payment C. Apply Payments or Print



- 4 Record services into Ciao! Optical and take payment.

# REPORTING

## RevolutionEHR



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**Daily:** Before you leave for the day, please confirm all services have been invoiced.

- Please run your Unassigned Items Report daily and take action if needed.
- If you have patients listed on the report, it means the OD has completed the exam but you have not bulk assigned and created an invoice.

**A**

**B**

**C**

# MATERIALS IN THE E.H.R



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In certain cases, materials will be entered in the E.H.R. for billing purposes. This may occur for medical plans that cover materials and routine carriers that do not have a portal. This is not a common occurrence.

- It is important to note that the materials must also be entered into Ciao! Optical since Ciao! is the point-of-sale system.
- Medically necessary contact lens submission: you maybe able to enter contact lenses into the E.H.R to generate a CMS 1500 form.

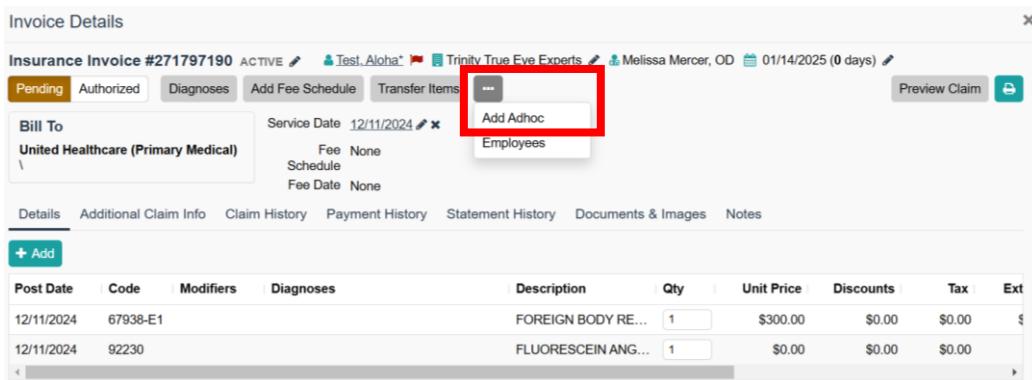
Please partner with your Medical Biller to learn more about this process when/if your site will need to put materials into the E.H.R.

# MATERIALS IN THE E.H.R



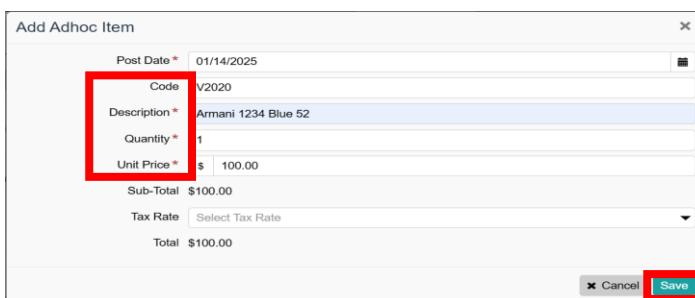
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1 Once the invoice has been created for the medical carrier, click the **three dots** and select **add adhoc**.



2 Enter materials and click **save** once completed.

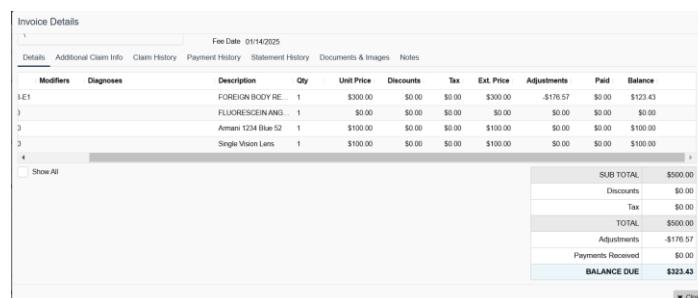
- Enter the Vcodes, description, and price for all frames & lens features, and contact lenses
- You may add as many line items on one invoice as needed
- [Click HERE](#) to be redirected to the **Price Key & Codes** document in Toolkit
- We are working towards entering all base lens costs into RevolutionEHR (this guide will be updated when this occurs)



**Tip:** in some cases, you will put quantity 2 for lenses (1 for the right eye and one for the left)

3 **Apply Fee Schedule.** The fee schedule is loaded into your E.H.R, this is the last step. If not, you will need to manually correct.

- In this example the fee schedule was applied to the exam procedure but not the materials



# MATERIALS IN THE E.H.R



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## Continued:

- Using the paper fee schedules in your office, manually calculate the “**adjustment**” amount (contractual write off)
- Click **transfer items**

Invoice Details

Insurance Invoice #271797190 ACTIVE Test, Aloha Eye Experts Melissa Mercer, OD 01/14/2025 (0 days)

Pending Authorized Diagnoses Remove Fee Schedule Transfer Items

Bill To: United Healthcare (Primary Medical)

Service Date: 01/14/2025

Fee Schedule: United Healthcare

Fee Date: 01/14/2025

Details Additional Claim Info Claim History Payment History Statement History Documents & Images Notes

Modifiers	Diagnoses	Description	Qty	Unit Price	Discounts	Tax	Ext. Price	Adjustments	Paid	Balance
3-E1		FOREIGN BODY RE...	1	\$300.00	\$0.00	\$0.00	\$300.00	-\$176.57	\$0.00	\$123.43

4

## Indicate **write-off** and select your reason from the pulldown bar.

- Enter the **transfer amount** (aka, adjustment)
- Click save once completed

Insurance balance = Plan Pays in Ciao!

Transfer Items

Invoice #271797190 for Test, Aloha\*

Transfer Type: Write-off Third party discount - Fee reduced/Participating Provider

Code	Description	Qty	Unit Price	Sub-total	Discounts	Tax	Ext. Price	Transfer	Adjustments	Paid	Balance
67938-E1	FOREIGN BODY REMOVAL, EYELID, EMBED , Upper left eyelid	1	\$300.00	\$300.00	\$0.00	\$0.00	\$300.00	\$0.00	-\$176.57	\$0.00	\$123.43
92230	FLUORESCIN ANGIOGRAPHY	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
V2020	Armani 1234 Blue 52	1	\$100.00	\$100.00	\$0.00	\$0.00	\$100.00	\$40.00	-\$40.00	\$0.00	\$60.00
V2100	Single Vision Lens	1	\$100.00	\$100.00	\$0.00	\$0.00	\$100.00	\$60.00	-\$60.00	\$0.00	\$40.00

Contractual write off = Discount column in Ciao!

CURRENT BALANCE: \$323.43  
Amount Transferred: \$100.00  
AFTER PAYMENTS & TRANSFERS: \$223.43

Save

5

- Print or write down plan pay & discount amounts to transfer to Ciao! Optical
- Leave in pending status for your biller