

Section 1

Creating an appointment in the Scheduler:

- Creating Patient Record
- Rescheduling an appointment
- Confirming appointments (Marking as Arrived)

Section 2

Digital Intake Form:

- Sending to Pt in office
- Resending to a Pt

Section 3

Adding Insurance in Eclips:

- Linking Insurance to Visit

Section 4

- Performing Pretests:

Section 5

Performing an Exam in Eclips:

- Coding and workflow
- Complete exam (3 ways)

Section 6

Invoicing and Checking out in Eclips:

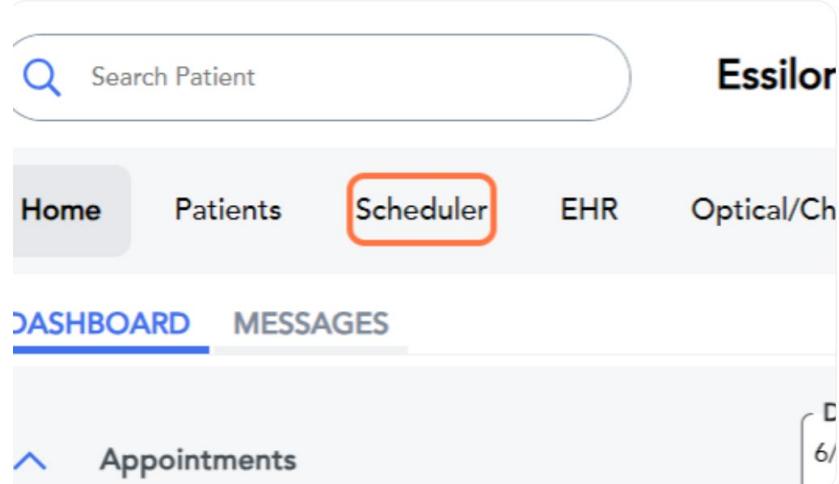
- Medical
- Private pay
- Routine Vision
- NEE

Knowledge checks:

- ✓ Create an Appointment
- ✓ Move/Cancel an appointment
- ✓ Fill out a DIF
- ✓ Add Insurance to a test patient (Medical and Routine Vision)
- ✓ Techs: Work up test Patient
- ✓ Doctors: Work up test patients. Both Routine and medical
- ✓ PCC: Invoice both Private pay and Medical insurance test patient
- ✓ PCC: Schedule pt for NEE also Checkout

Section 1: Creating an Appointment in Scheduler.

1. Select Scheduler from the top tool bar.

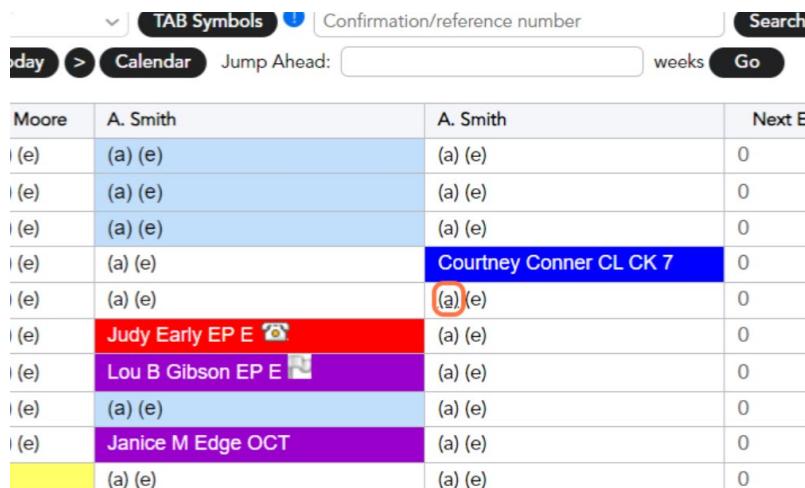


2. Select the appropriate time and date for the appointment.

3. Select (a) for an appointment.

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.



The screenshot shows a list of appointments in the Scheduler interface. At the top, there are search and filter options: 'TAB Symbols' (with a blue eye icon), 'Confirmation/reference number', 'Search' button, 'day' and 'Calendar' buttons, 'Jump Ahead:' input field, 'weeks' dropdown, and a 'Go' button. Below these are appointment slots for different patients and times. The slots are color-coded: blue for available appointments, white for walk in, emergency, or work in appointments, and red for lunch blocks. Some slots contain symbols: a blue eye icon for 'TAB Symbols', a red eye icon for 'Confirmation/reference number', and a red circle with a question mark for 'Jump Ahead:'. The appointment details include patient names, appointment types, and counts (e.g., 'Courtney Conner CL CK 7', 'Judy Early EP E', 'Lou B Gibson EP E').

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

4. Enter all patient demographics into the appropriate sections. These will be noted by a red *

Note: It is best practice to get as much information from the patient as possible.

ECLIPS TRAINING GUIDE

Triangle Visions Optometry Gastonia
David
2023 09:20 AM

Family Account Setup 
To schedule for an existing patient, link to Family Accounts.

Would you like to setup a Family Account for new patients? Yes

You will have the option to share communication and insurance information in Family

* = Required fields

* Test **Search**

* Doinga

* (MM/DD/YYYY)

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

Test Ramsuhag, 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 27601
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	

6. 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

Rescheduling an appointment in Eclips.

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
Doing a Test F	0
Judy EP E 📞	0
Lou B Gibson EP E 📞	0
Edge OCT	0
(a) (e)	0

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

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

< Back Cancel Cut Arrived Finished

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

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

4. Appointment has now been rescheduled.

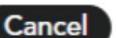
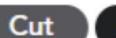
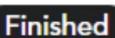
Canceling an appointment in ECLIPS

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
	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 Cancel from the black tool bar form the bottom.

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

3. Appointment has now been cancelled.

Confirming and Arriving Patients

1. Select the patient to confirm.

	A. Smith	Next Exam
	(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 and select Arrive from the black tool bar from the bottom.

Ask patient "Is it OK if we call you with a live or pre-recorded appointment notifications, for example eye exam reminder Postcards. [View notifications.](#)

< Back Cancel Cut Arrived Finished

3. Patient now arrived in the system.



Quick Reference

Appointment Color Codes

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

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

Checking a Patient In

- Click on patient’s appointment.
- Click “check in” button at bottom of screen.
- Appointment should turn purple.

Checking a Patient Out

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

Moving the NEE to a Scheduled Appointment

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

Rescheduling a Patient

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

TAB Symbols

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

Accessing Reports

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

Exam symbols 7

- (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

Section 2

Digital Intake Form (DIF)

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

We can't wait to see you, Doingatest!

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

Please read and e-sign the documents below

 Acknowledgment Of Receipt Of Privacy Practices 

 Authorization To Share Health Information 



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:

Duration:

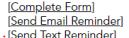
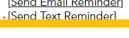
Scheduling Method:

Confirmed: 24 hour confirmation call complete

Left voice message for Patient

Message Left:

Patient Forms:   

Does Patient Require Language Assistance?

Language:

Birth Date: (MM/DD/YYYY)

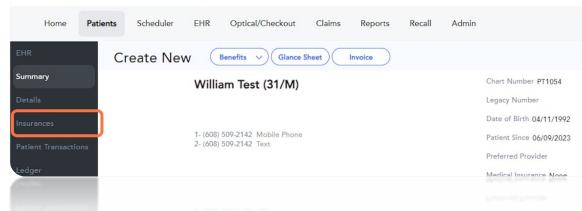
Guardian Last: First:

 Guardian name is displayed when sending appointment reminders for minors

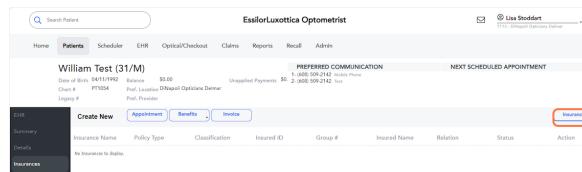
3. Note: You have the option to complete the form for the patient by selecting Complete Form.

Section 3 Adding insurance to a visit.

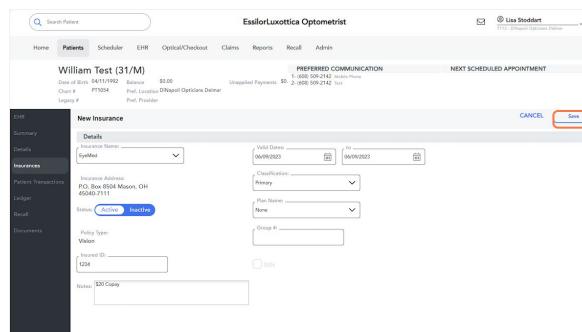
1. Access The Patient Either From The HOME Or PATIENT Tab
2. Once The Patient Is Pulled Up, Select Insurance On Left Side To Enter The Insurance Section



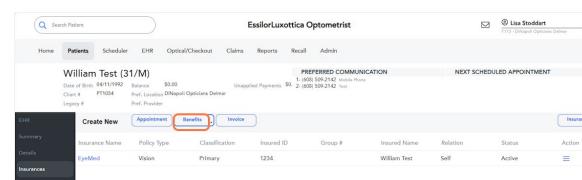
3. Then Click Insurance On The Top Right To Add A Plan



4. Then Add The Insurance Details From The Drop-Down Bars
5. Complete: Type Of Insurance, Valid Dates, Classifications, Active Status, ID Number, Auth # If Relevant, Primary Member, Any Notes, Etc.
6. When Finished, Click Save
7. Note: If The Patient Hasn't Completed DIF You Will Need To Complete The Address



8. Repeat A Second Time If You Have A Second Plan To Enter (Medial + Routine)
9. Once Saved, Select Benefits To Tell Eclips What The Benefits Are

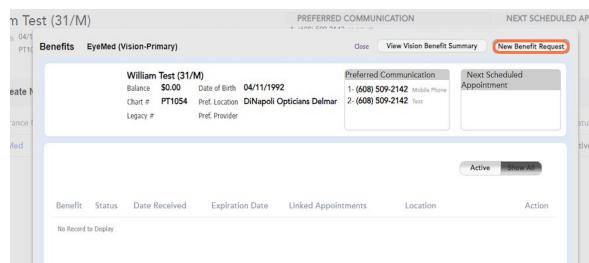


ECLIPS TRAINING GUIDE

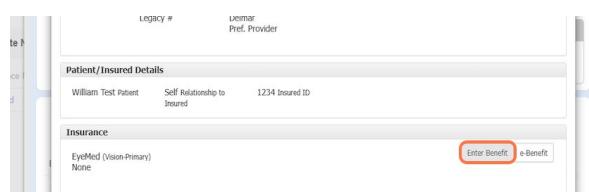
10. On The Pulldown Bar, Select The Plan You'd Like To Update



11. Then Select New Benefit Request

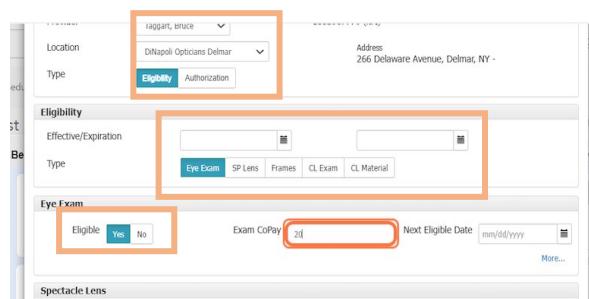


12. Select The Enter Benefits Button To Edit Patient Insurance Benefits



13. Complete Provider And All Benefit Details

14. Note: Other Than Medicare Materials, All Other Materials Are Billed In Ciao So You Can Leave Material Copays Out, Your Choice

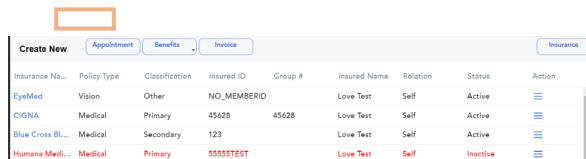


15. Save On The Bottom Right And Close Top Of Open Screen

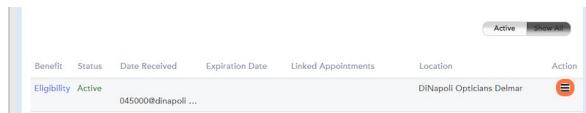


ECLIPS TRAINING GUIDE

16. From The Landing Page Within The Insurance Section, Select Benefits And The Plan The Patient Is Using From The Dropdown List



17. Then Select The Hamburger To Link The Appointment



18. Select Link Appointment

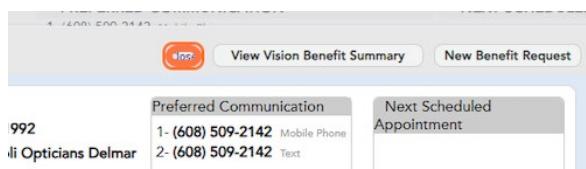


19. Select The Appointment You Want To Link With The Box On The Left Of The Appointment

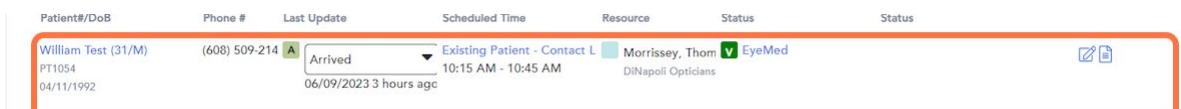
20. Select Link Appointment



21. Close The Pop-Up Window

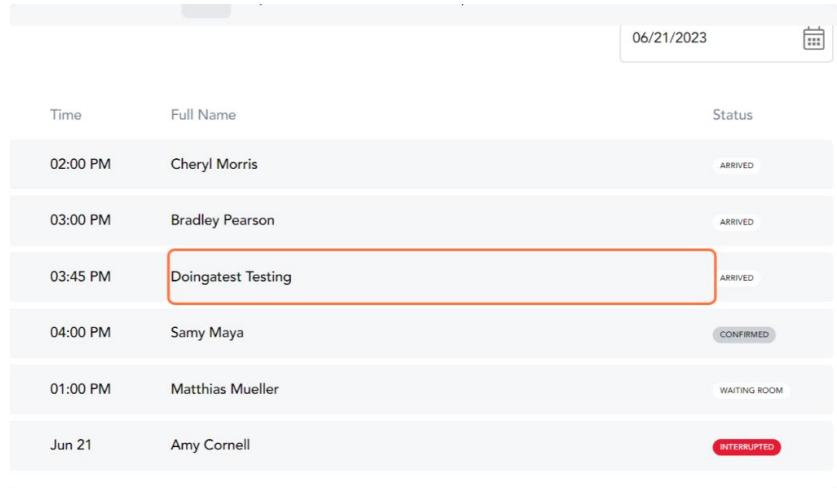


22. If Linked Correctly, The Insurance Will Now Have A Green Box On The HOME Tab



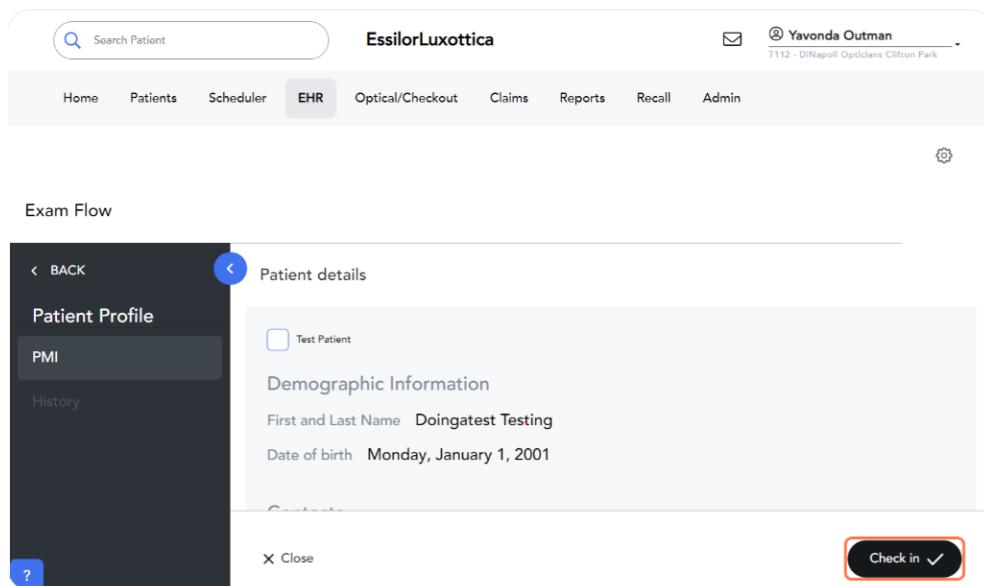
Section 4 Pretesting

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
T112 - DiNapoli Opticians Clifton Park

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

Exam Flow

Patient Profile

PMI

History

BACK

Patient details

Test Patient

Demographic Information

First and Last Name Doingatest Testing

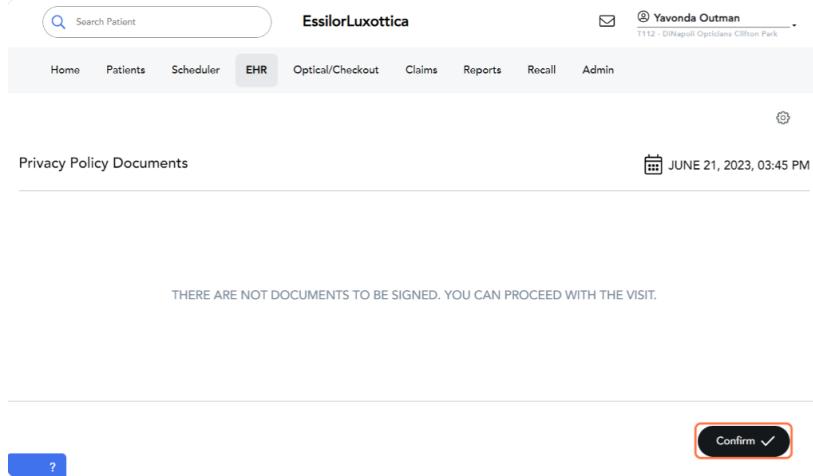
Date of birth Monday, January 1, 2001

Close

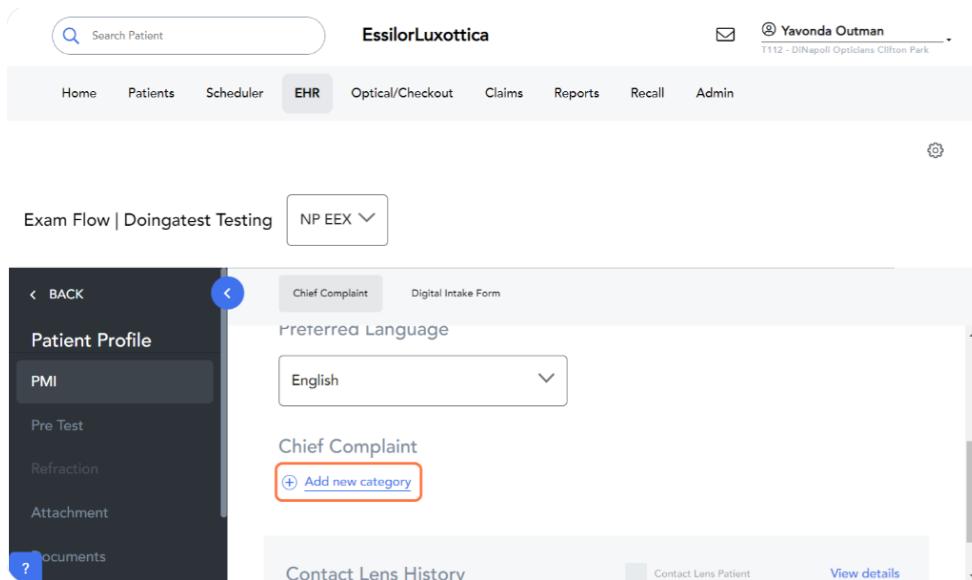
Check in ✓

ECLIPS TRAINING GUIDE

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



5. Click on Add New Category

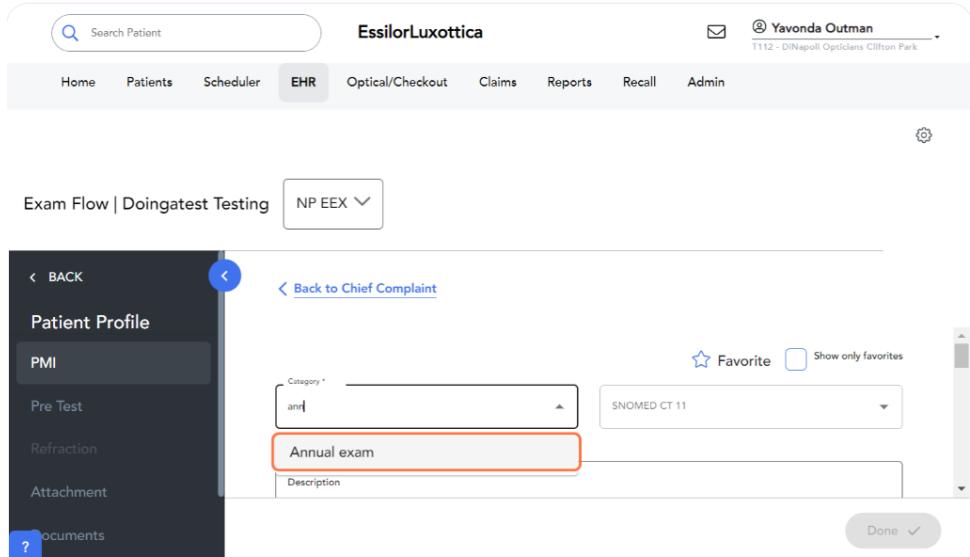


6. Click Add New Category and Select a Chief complaint category.

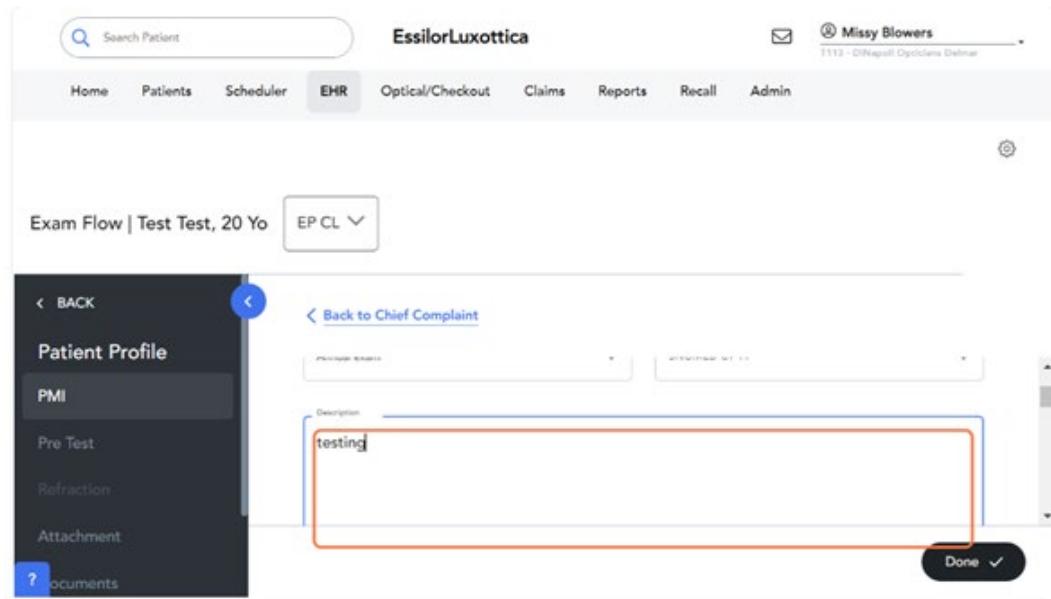
*Note: Please select the most appropriate reason for the patient visit. To begin type at least three letters to auto populate the field. This is not a free type field. You must select one of the preselected categories. A complete list is found at the end of this guide.

ECLIPS TRAINING GUIDE

7. Select the appropriate category form the drop-down menu.

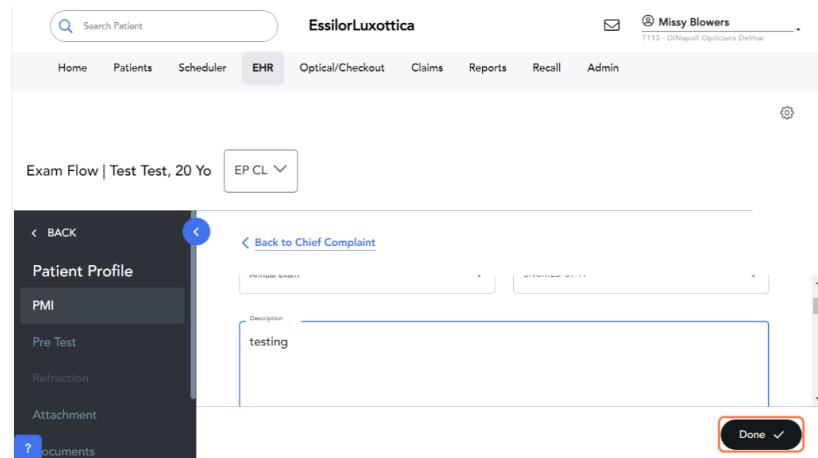


8. Input details of chief complaint and appropriate patient history.

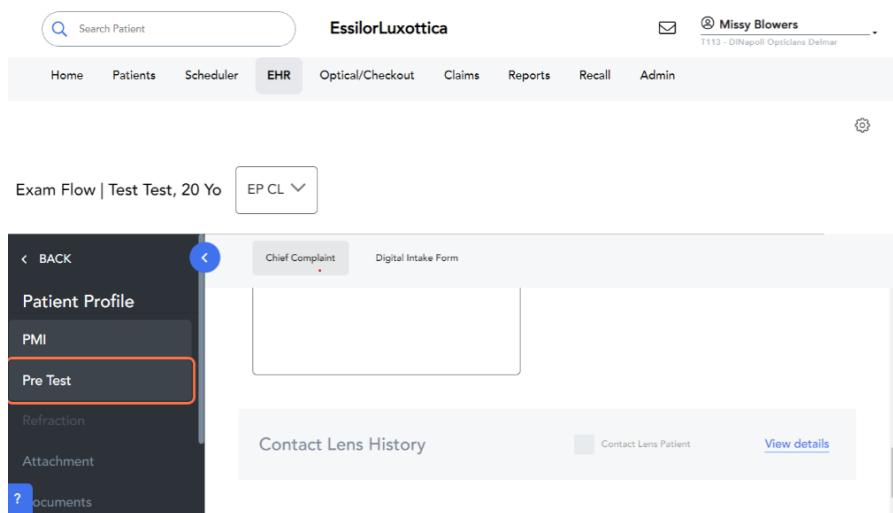


ECLIPS TRAINING GUIDE

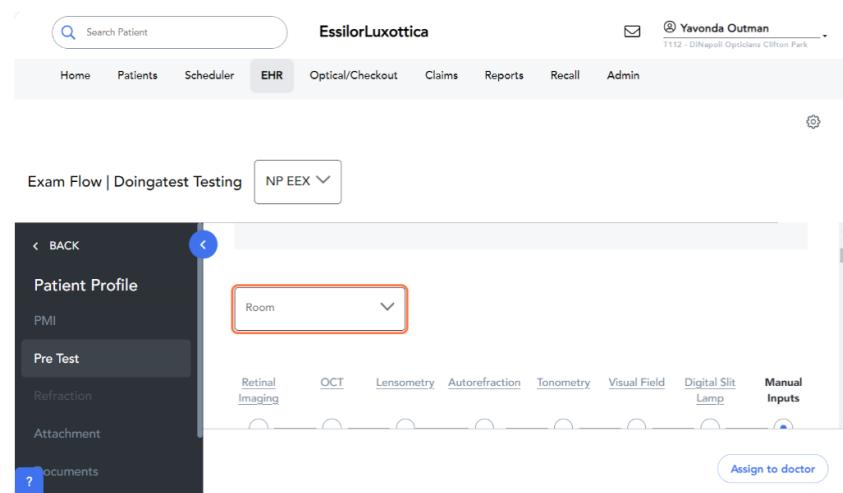
9. Click Done

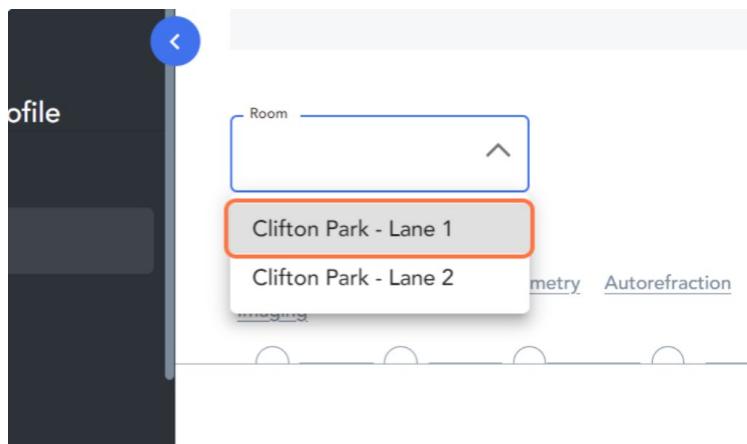


10. Click on Pre -Test from the toolbar on the left

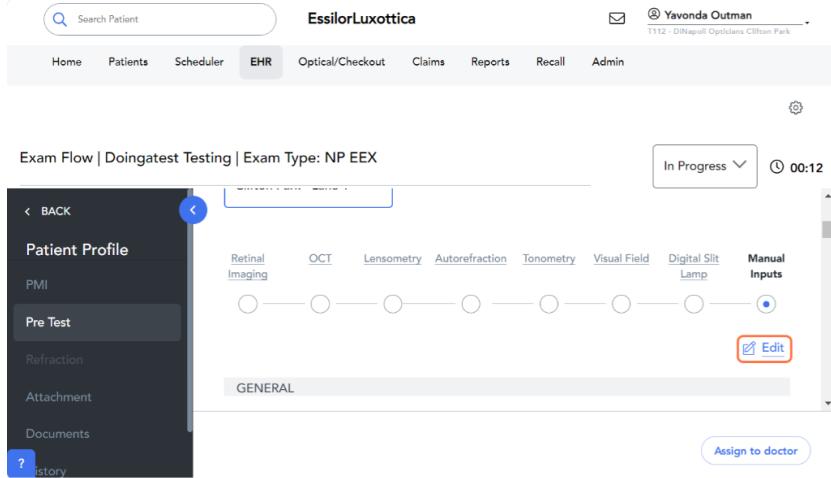


11. Select the Room the patient where patient will be located.

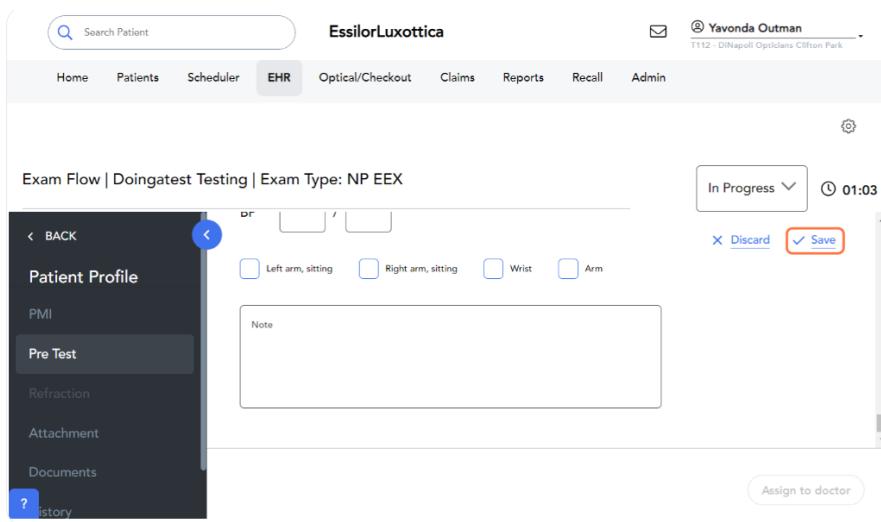




12. Click Edit to manually input patient data for any of the pretest fields.

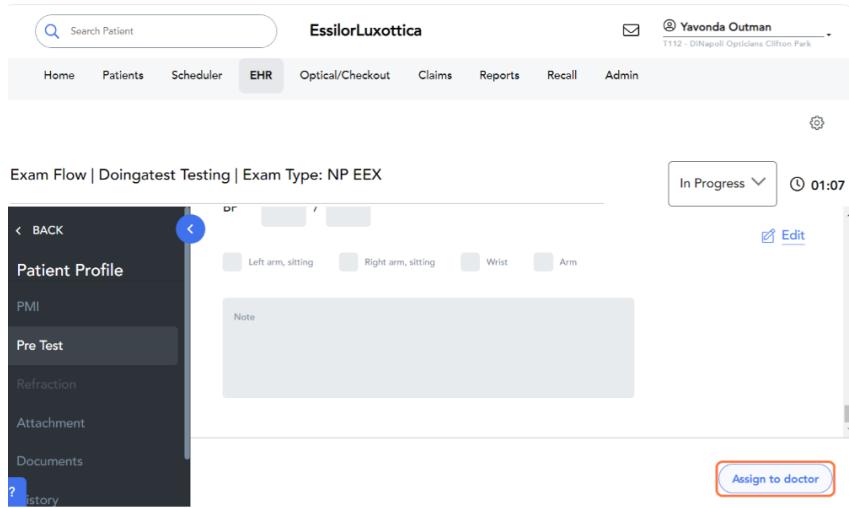


13. Once all fields are complete. Select Save.

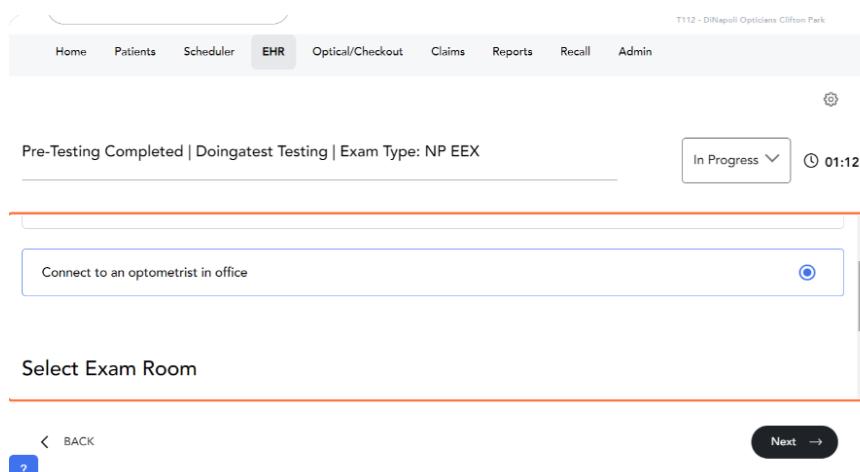


ECLiPS TRAINING GUIDE

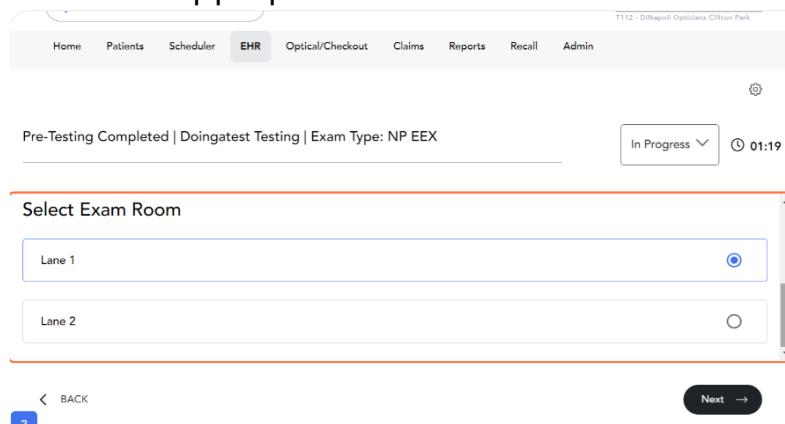
14. Click on Assign to Doctor. This step **must** be completed. To progress the exam.



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

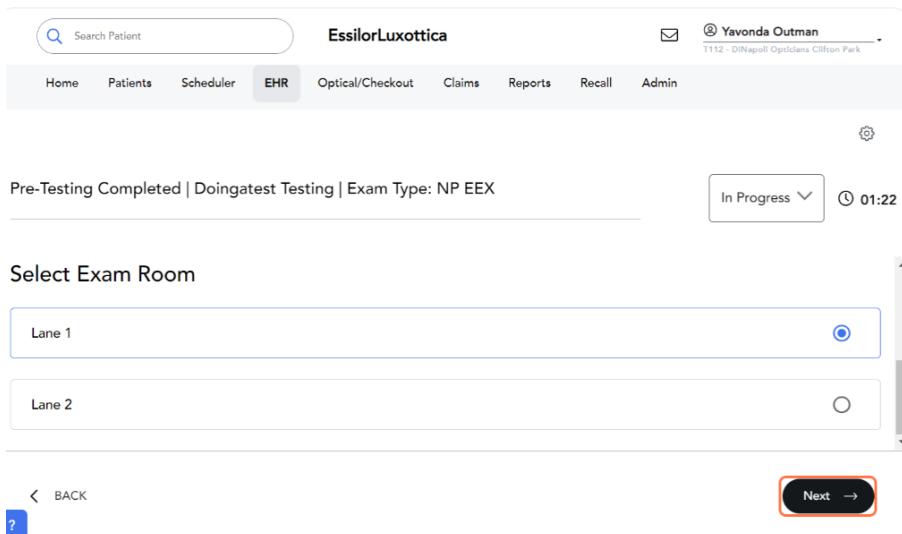


16. Scroll down and Select the appropriate exam room.

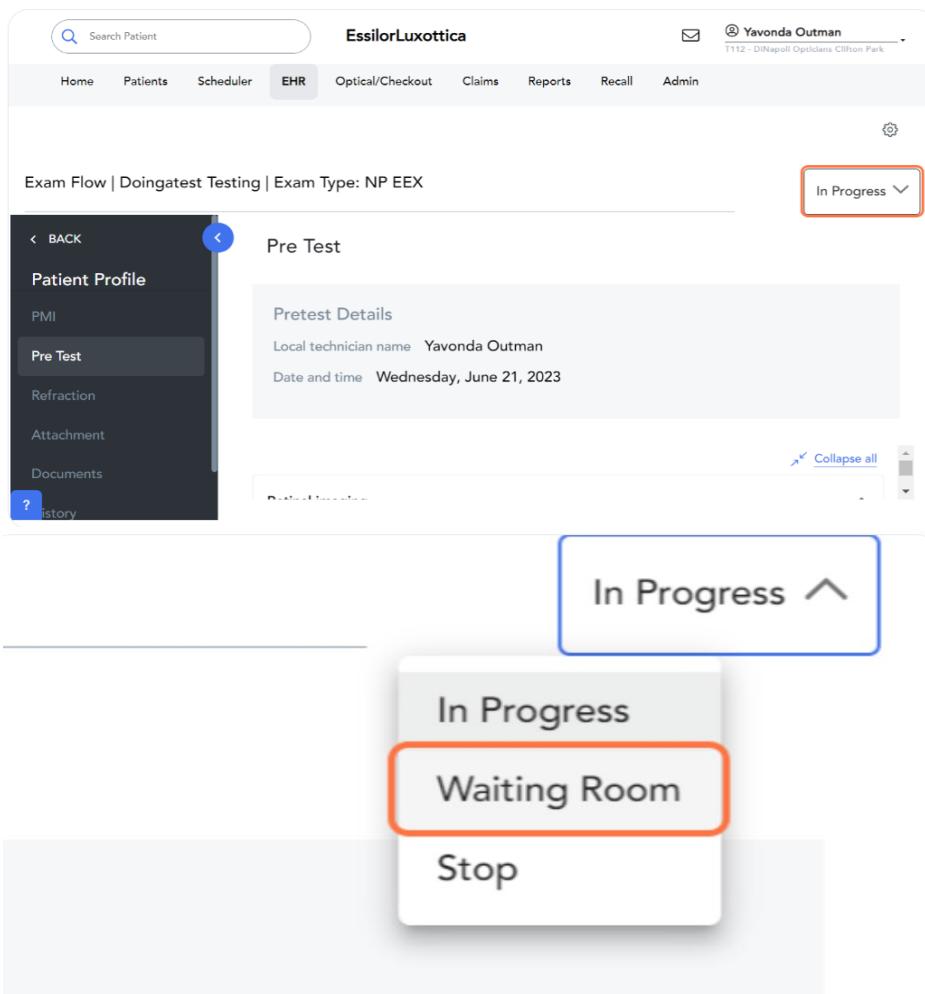


ECLIPS TRAINING GUIDE

17. Click Next



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

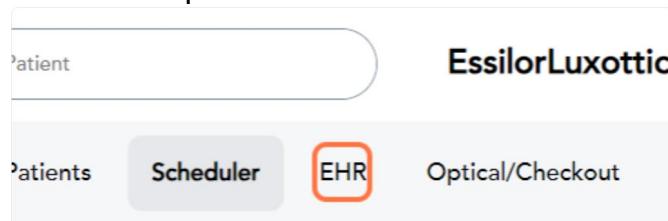


Section 5: Performing a Routine Eye Exam

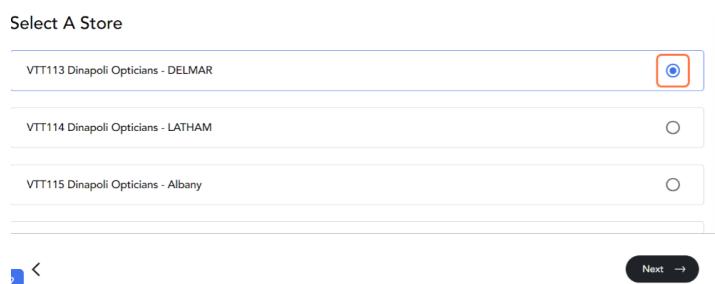
1. Eclips

Go to <https://eclips.essilorluxottica.com/Uprise/PMS/>

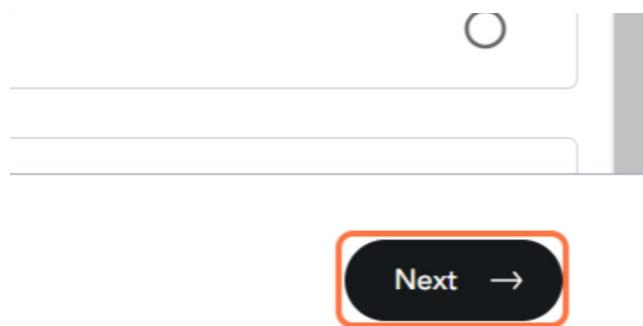
2. Click on EHR to select the patient



3. Select A Store

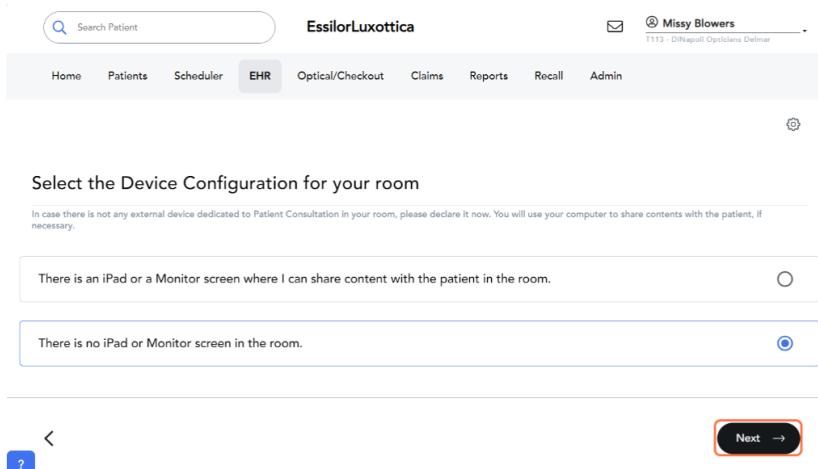


4. Click on Next on the bottom right of the page



ECLiPS TRAINING GUIDE

5. Select "there is not iPad or Monitor screen in the room"
6. Select Next



Search Patient EssilorLuxottica Missy Blowers T113 - DiNapoli Opticians Delmar

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

Select the Device Configuration for your room

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

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

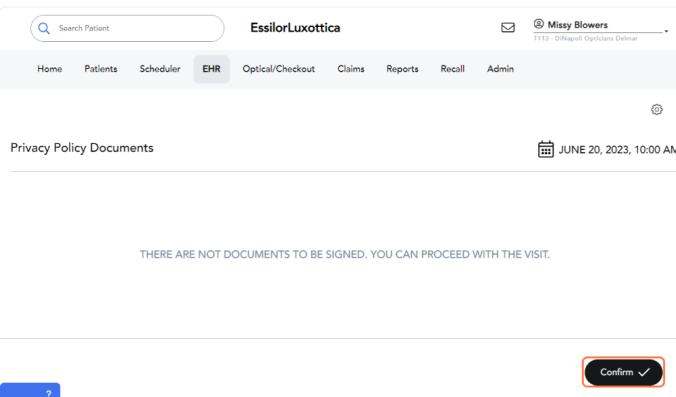
There is no iPad or Monitor screen in the room.

<  **Next →**

7. Select the appropriate patient from the EHR screen.

Appt Time	Name And Location	Exam Type	Start Time
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

8. Click Confirm



Search Patient EssilorLuxottica Missy Blowers T113 - DiNapoli Opticians Delmar

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

Privacy Policy Documents JUNE 20, 2023, 10:00 AM

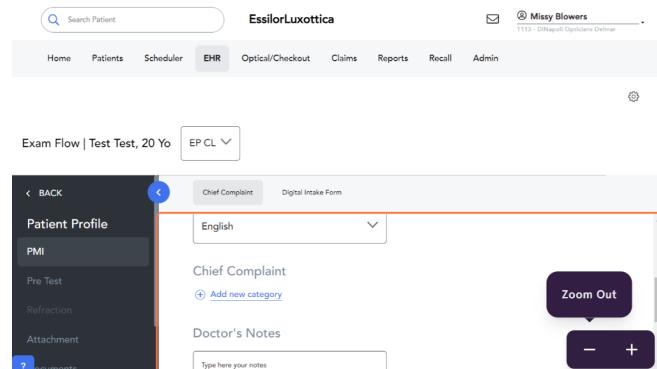
THERE ARE NOT DOCUMENTS TO BE SIGNED. YOU CAN PROCEED WITH THE VISIT.

<  **Confirm ✓**

ECLIPS TRAINING GUIDE

8. Select PMI from the Black toolbar to the right:
9. Optional: Review Digital Intake Form with patient

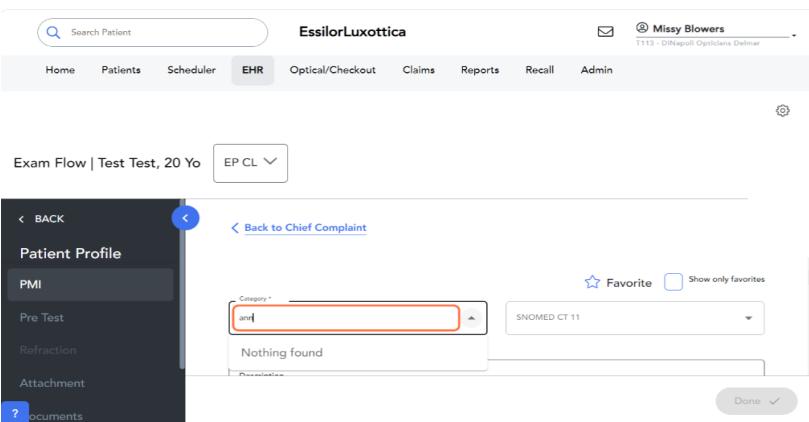
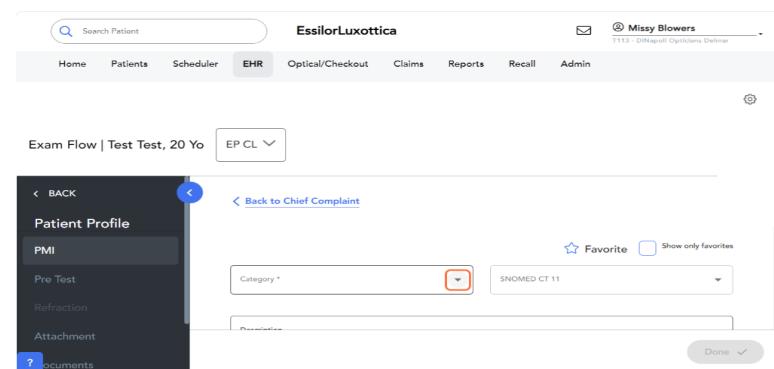
Note: If tech has performed pretest skip to step #24



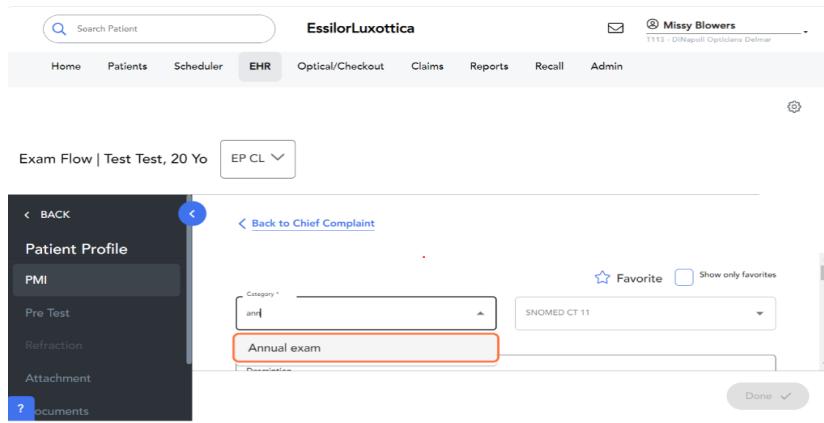
10. Click Add New Category

11. Select a Chief complaint category.

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

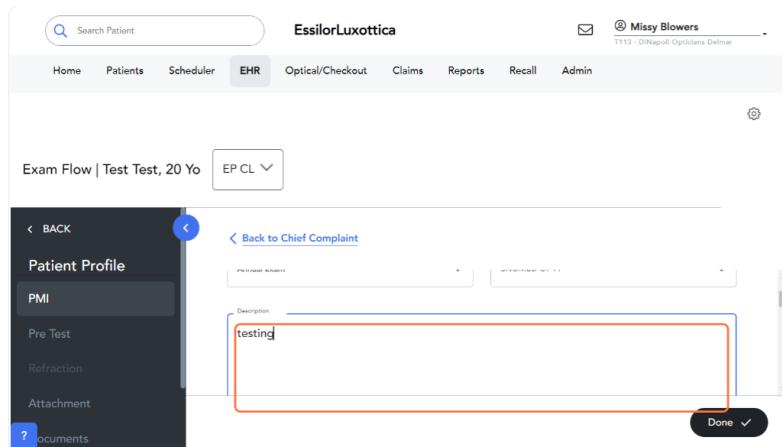


ECLIPS TRAINING GUIDE



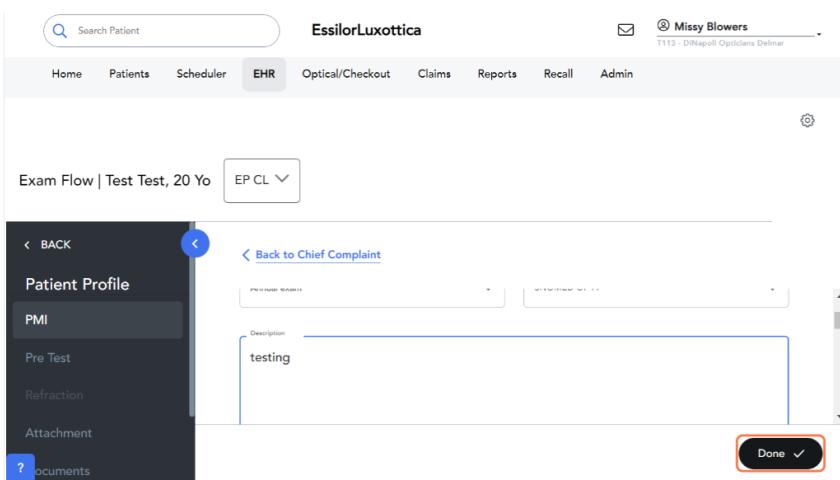
The screenshot shows the ECLIPS software interface. At the top, there is a navigation bar with links for Home, Patients, Scheduler, EHR, Optical/Checkout, Claims, Reports, Recall, and Admin. The EHR tab is currently selected. On the left, a sidebar titled 'Patient Profile' includes sections for PMI, Pre Test, Refraction, Attachment, and a 'documents' section with a question mark icon. The main content area is titled 'Back to Chief Complaint'. It features a search bar with the placeholder 'Category * and' and a dropdown menu for 'SNOMED CT 11'. A text input field contains the text 'Annual exam', which is highlighted with a red box. To the right of the input field are 'Favorite' and 'Show only favorites' checkboxes. At the bottom right of the main area is a 'Done' button with a checkmark icon.

12. Type details of chief complaint



The screenshot shows the ECLIPS software interface. The navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Back to Chief Complaint'. It features a search bar with the placeholder 'Category * and' and a dropdown menu for 'SNOMED CT 11'. Below the search bar is a text input field labeled 'Description' containing the text 'testing', which is highlighted with a red box. At the bottom right of the main area is a 'Done' button with a checkmark icon.

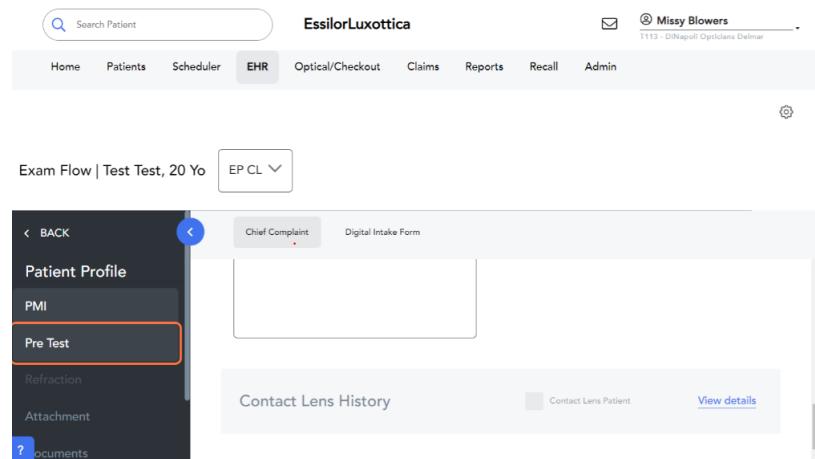
13. Click Done



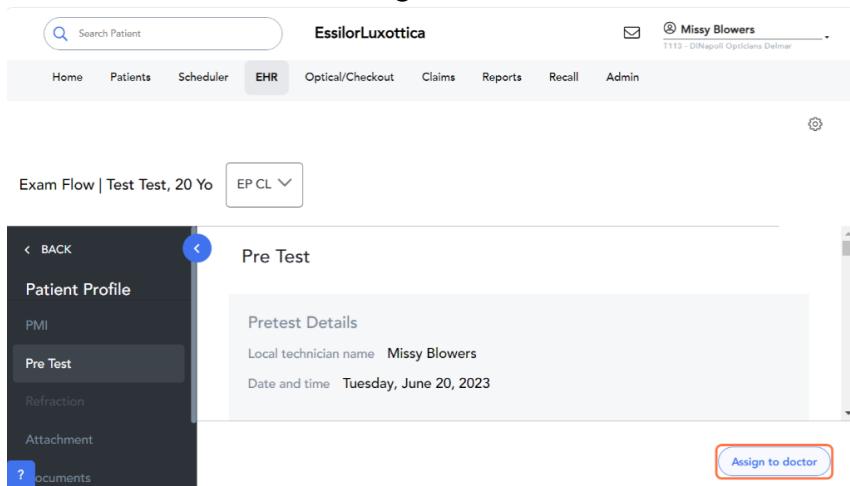
The screenshot shows the ECLIPS software interface. The navigation bar and sidebar are identical to the previous screenshots. The main content area is titled 'Back to Chief Complaint'. It features a search bar with the placeholder 'Category * and' and a dropdown menu for 'SNOMED CT 11'. Below the search bar is a text input field labeled 'Description' containing the text 'testing'. At the bottom right of the main area is a 'Done' button with a checkmark icon, which is highlighted with a red box.

ECLiPS TRAINING GUIDE

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

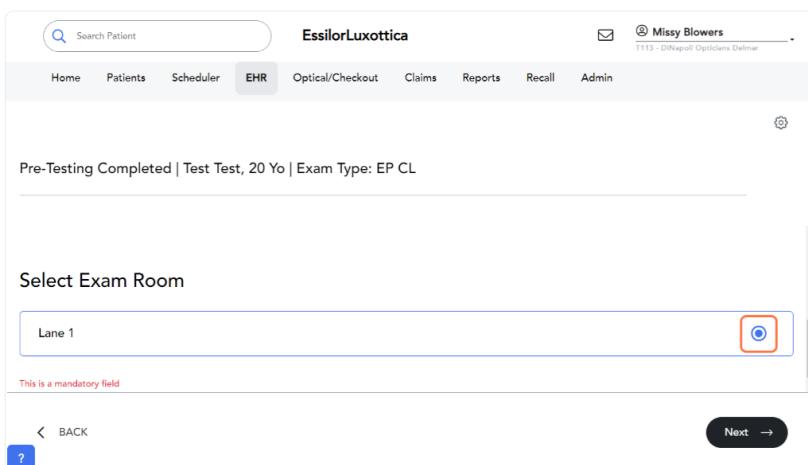


15. Click Assign to Doctor on the lower right



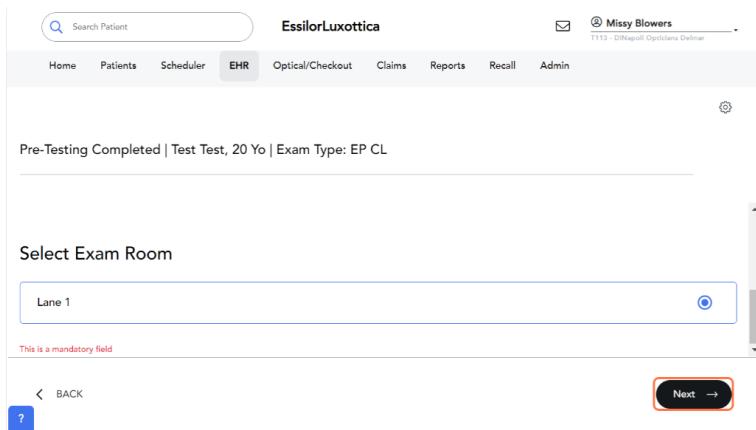
16. You should now see "Pre-Testing Completed" at the top of the page.

17. Next scroll down to select an Exam Room



ECLiPS TRAINING GUIDE

18. Click Next



Search Patient EssilorLuxottica Missy Blowers T113 - DiNapoli Opticians Delmar

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

Pre-Testing Completed | Test Test, 20 Yo | Exam Type: EP CL

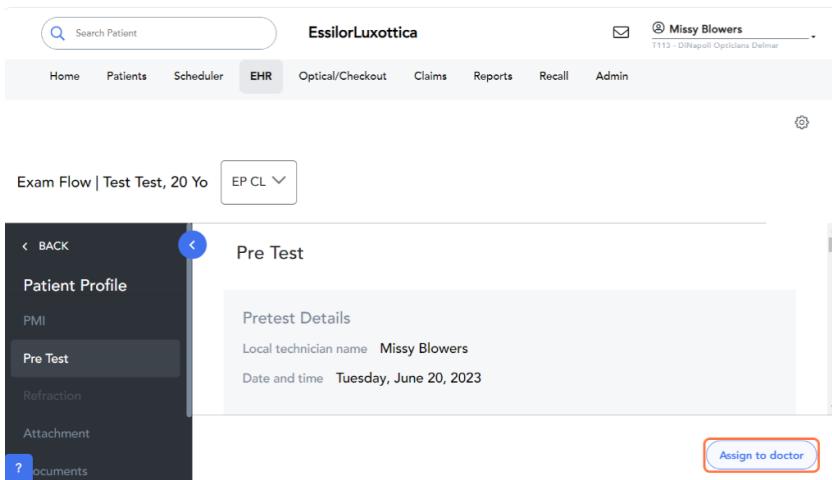
Select Exam Room

Lane 1

This is a mandatory field

BACK ? Next →

19. Click Assign to Doctor on the lower right



Search Patient EssilorLuxottica Missy Blowers T113 - DiNapoli Opticians Delmar

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

Exam Flow | Test Test, 20 Yo EP CL ▾

BACK ? Pre Test

Patient Profile

PMI

Pre Test

Refraction

Attachment

documents

Pretest Details

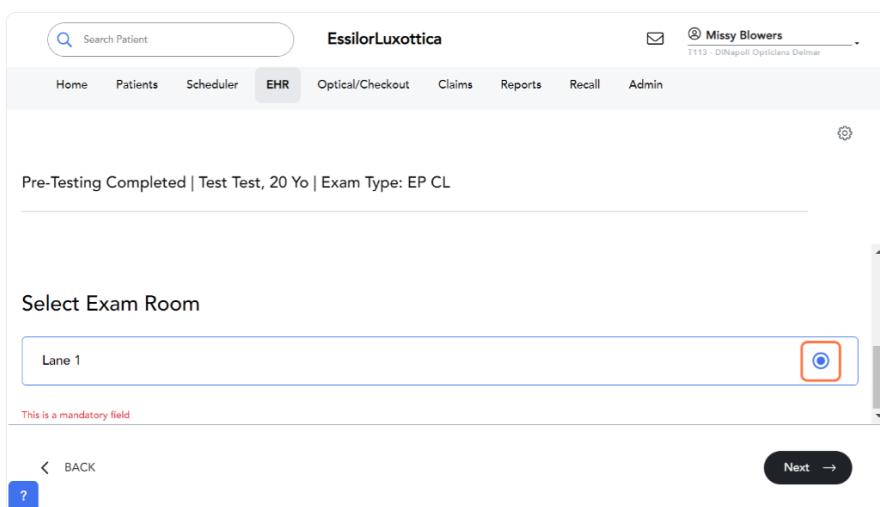
Local technician name Missy Blowers

Date and time Tuesday, June 20, 2023

Assign to doctor

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

21. Next scroll down to select Exam Room.



Search Patient EssilorLuxottica Missy Blowers T113 - DiNapoli Opticians Delmar

Home Patients Scheduler EHR Optical/Checkout Claims Reports Recall Admin

Pre-Testing Completed | Test Test, 20 Yo | Exam Type: EP CL

Select Exam Room

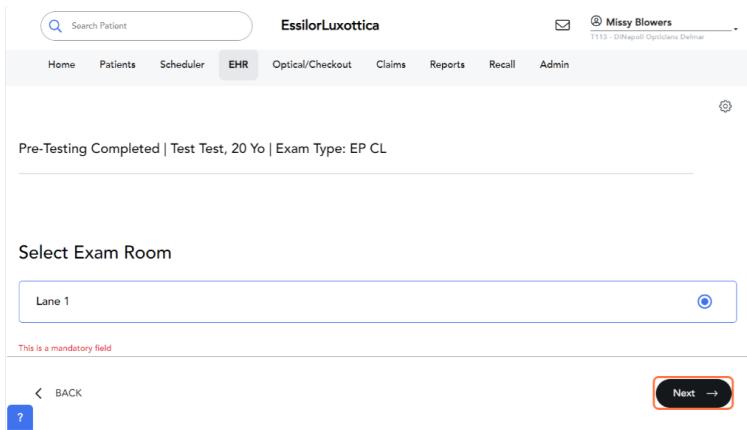
Lane 1

This is a mandatory field

BACK ? Next →

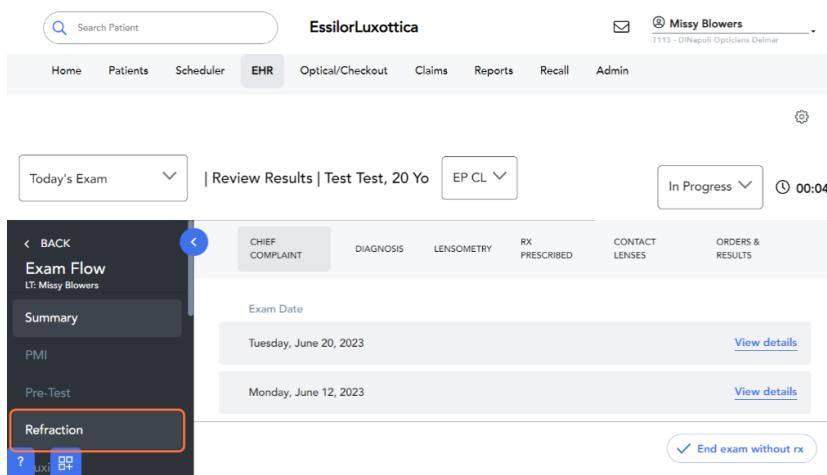
ECLiPS TRAINING GUIDE

22. Click Next

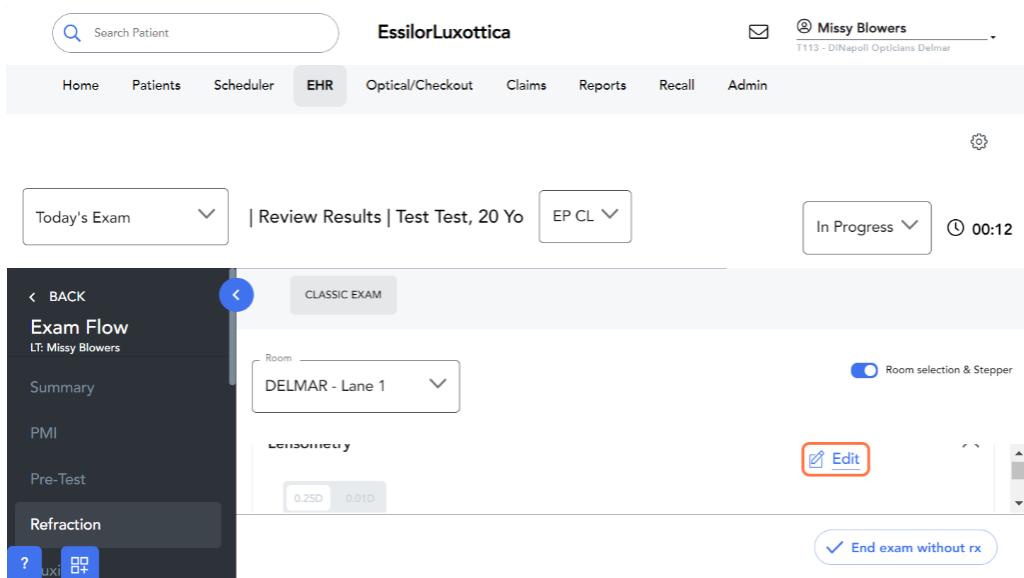


23. Perform only the sections of the pre-test that are necessary to your clinic. Note that it is not mandatory to fill them all in.

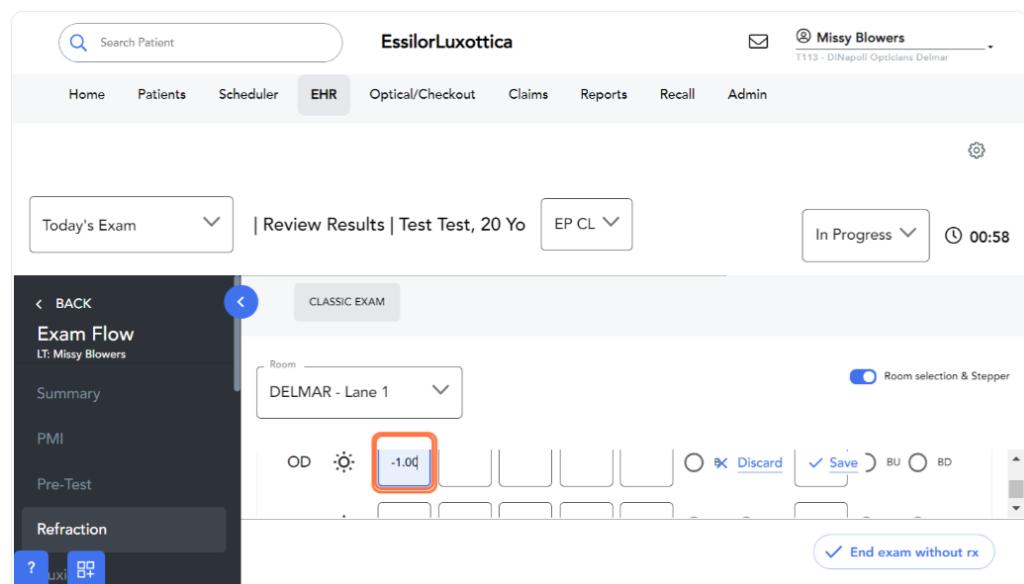
24. Select Refraction



25. Click Edit.

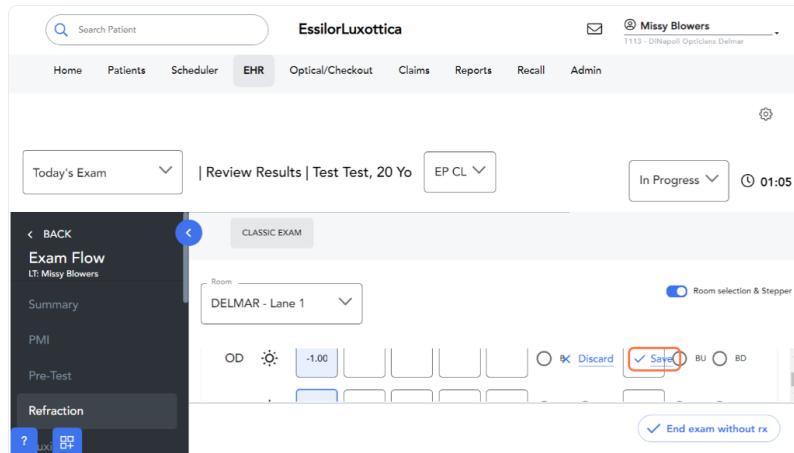


26. Enter in refractive data in the appropriate section.



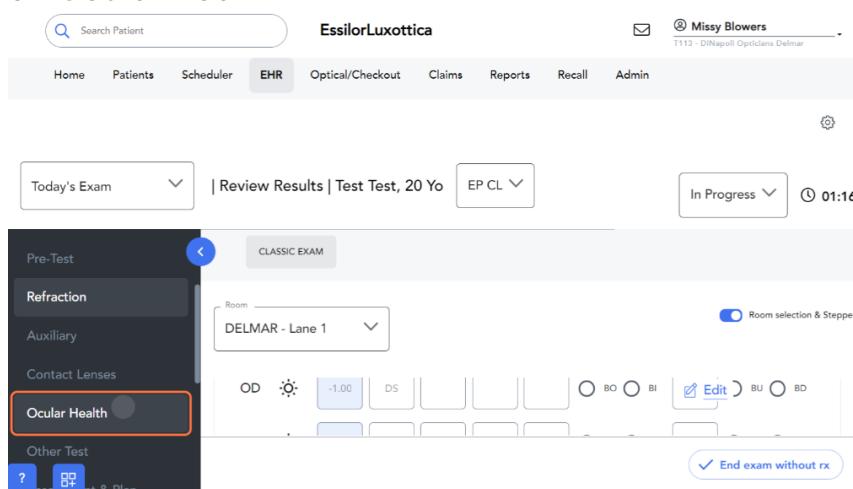
ECLiPS TRAINING GUIDE

27. Click Save

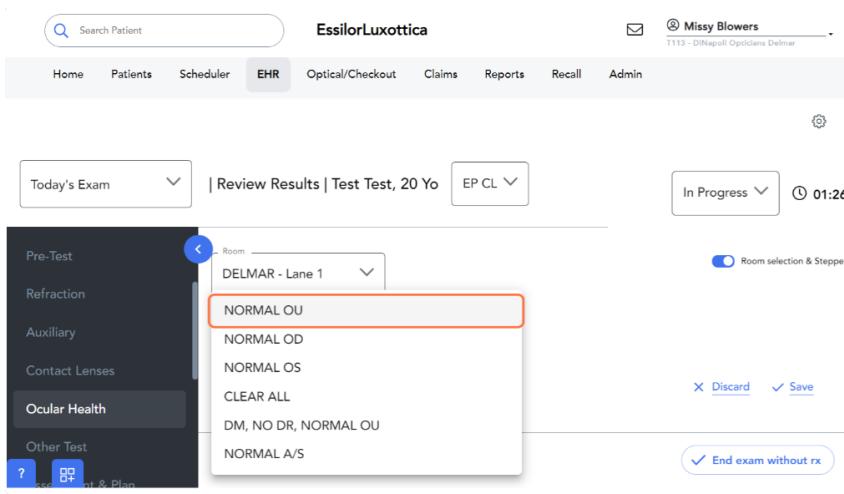


28. Click Contact Lenses and fill out appropriate information if needed.

29. Click on Ocular Health



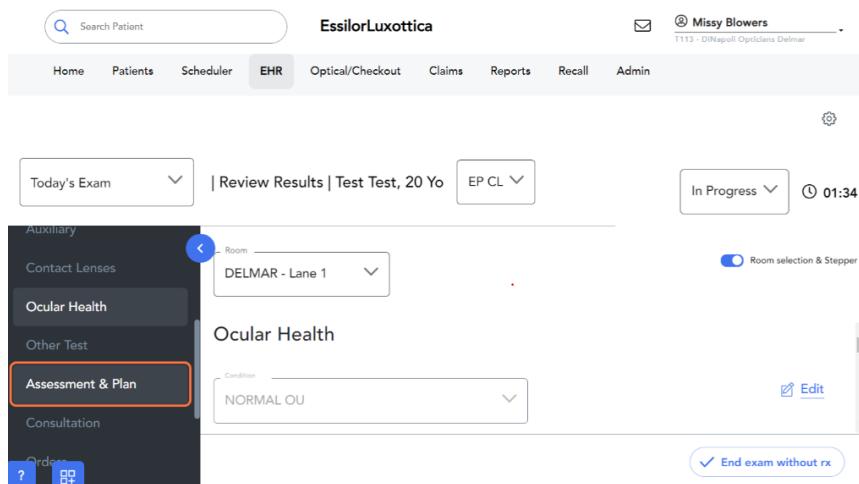
30. Tip: You can click on Condition and Populate "Normal OU" this will automatically set all values to Normal. If an abnormality presents change only that value.



ECLiPS TRAINING GUIDE

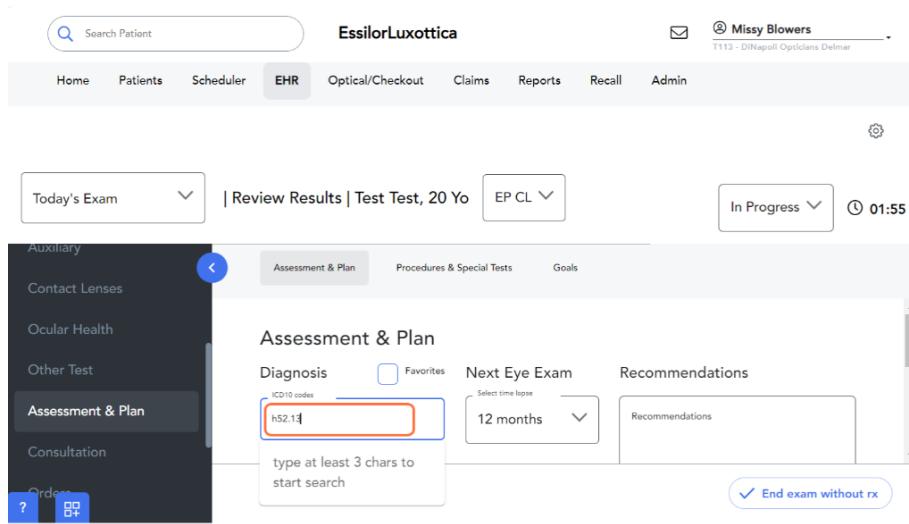
31. Click Save.

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



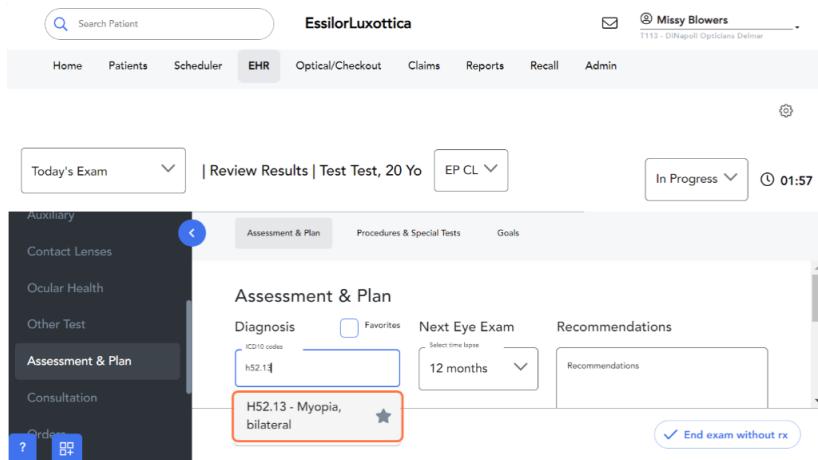
33. Input at least three character of the Diagnosis Code(s) to start the search. Common Codes can be found at the end of this guide.

Note: You cannot free type in this section.



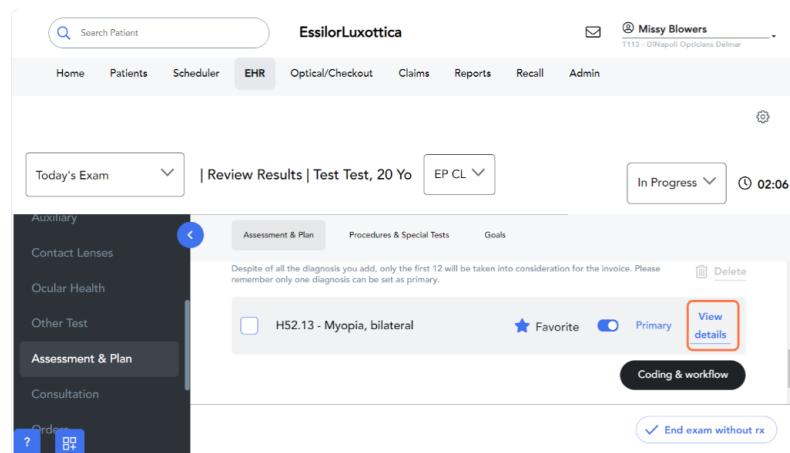
ECLiPS TRAINING GUIDE

34.. Select the appropriate diagnosis codes.



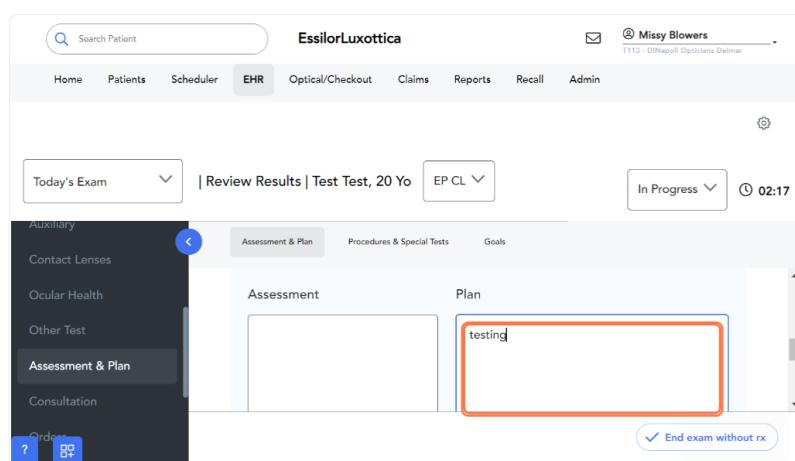
The screenshot shows the ECLiPS software interface. The top navigation bar includes 'Search Patient', 'EssilorLuxottica', and 'Missy Blowers'. The main menu has tabs for 'Home', 'Patients', 'Scheduler', 'EHR', 'Optical/Checkout', 'Claims', 'Reports', 'Recall', and 'Admin'. The 'EHR' tab is selected. The 'Assessment & Plan' tab is active. The 'Assessment & Plan' section contains a 'Diagnosis' section with a dropdown for 'ICD10 codes' showing 'H52.13'. A 'Favorites' button is next to it. A 'Select time lapse' dropdown is set to '12 months'. The 'Next Eye Exam' and 'Recommendations' sections are also visible. A 'View Details' button for the diagnosis is highlighted with a red box.

35. Click View Details on each diagnosis



The screenshot shows the ECLiPS software interface after clicking 'View Details' for the diagnosis. A message box appears stating: 'Despite of all the diagnosis you add, only the first 12 will be taken into consideration for the invoice. Please remember only one diagnosis can be set as primary.' The diagnosis 'H52.13 - Myopia, bilateral' is listed with a 'Favorite' button, a 'Primary' button, and a 'View details' button, which is highlighted with a red box. A 'Coding & workflow' button is also visible.

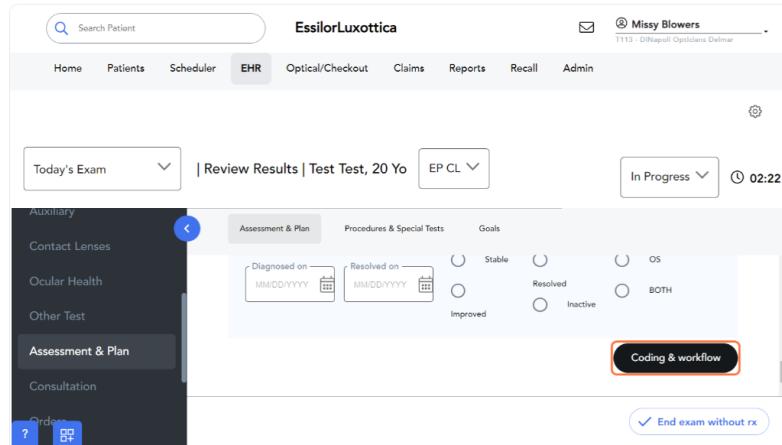
36.Type out the assessment and plan for each diagnosis



The screenshot shows the ECLiPS software interface with the 'Assessment & Plan' section active. The 'Assessment' and 'Plan' tabs are visible. The 'Plan' section contains a text input field with the word 'testing' typed into it. The entire 'Plan' section is highlighted with a red box.

ECLIPS TRAINING GUIDE

37. Select Coding and Workflow.



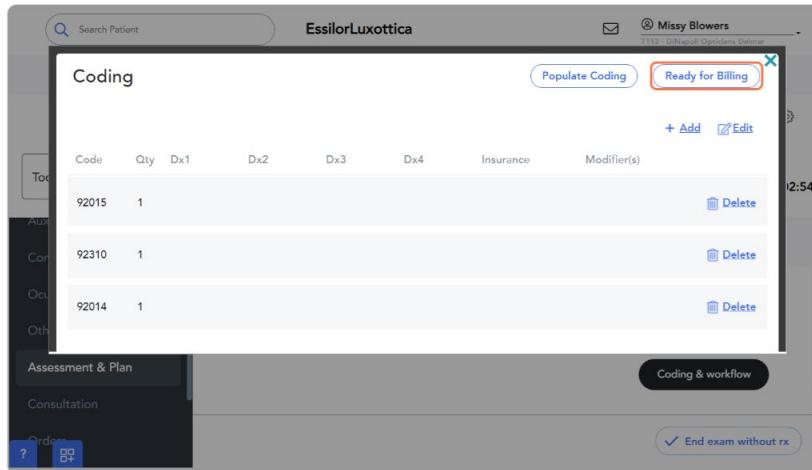
38. Click Populate Coding.

39. Review codes.

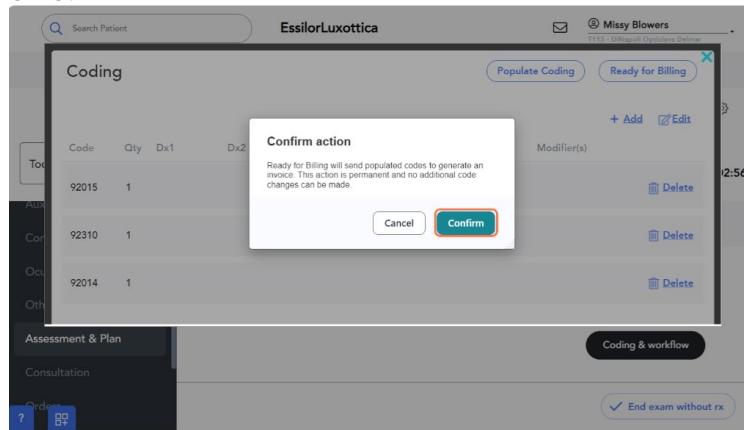
*To add or edit a code use the appropriate buttons on the right.

*Please note that Eclips does not evaluate risk level and accuracy.

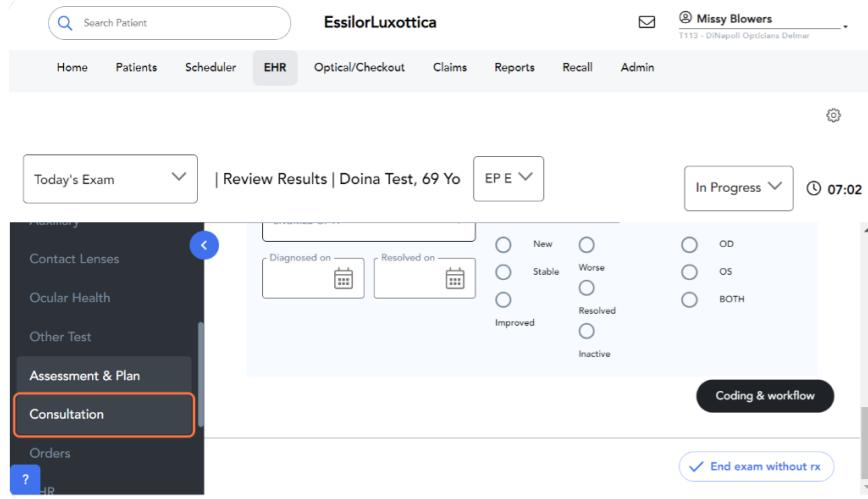
40. Once review is complete. Click Ready for Billing.



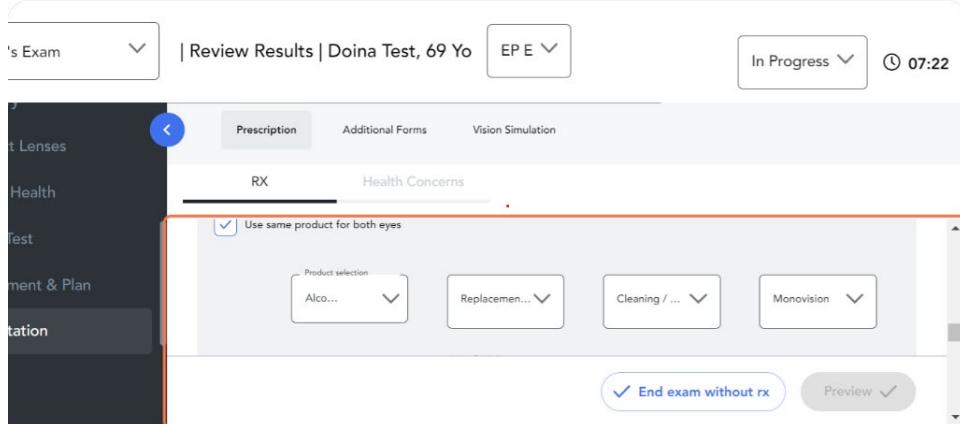
41. Confirm Action: Please note that you have confirmed this action it cannot be undone.



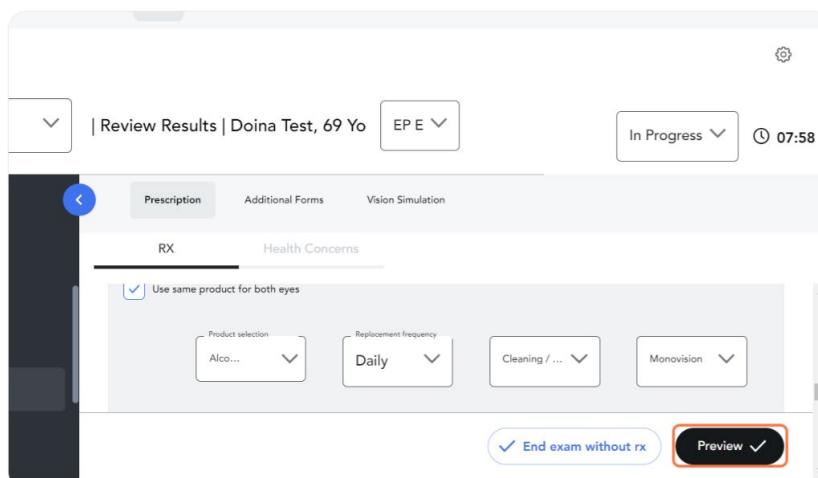
42. Click the "X" to close the pop-up box.
43. Select Consultation from the Black tool bar on the left.



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

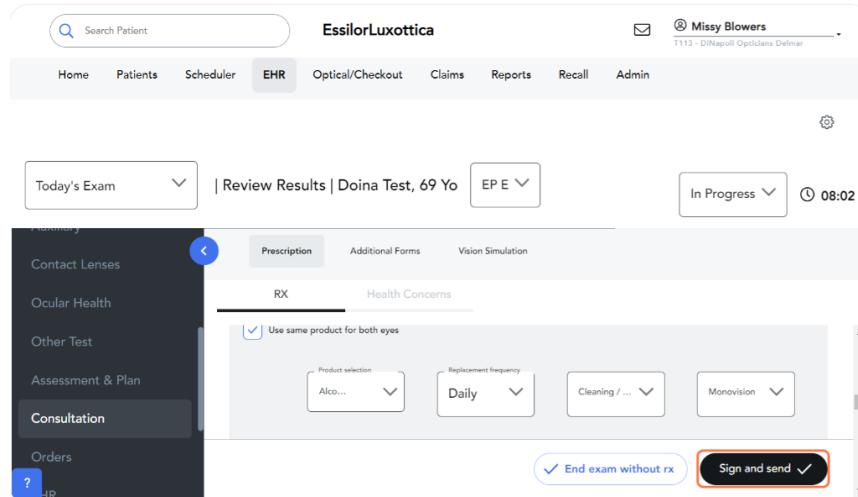


45. Click Preview

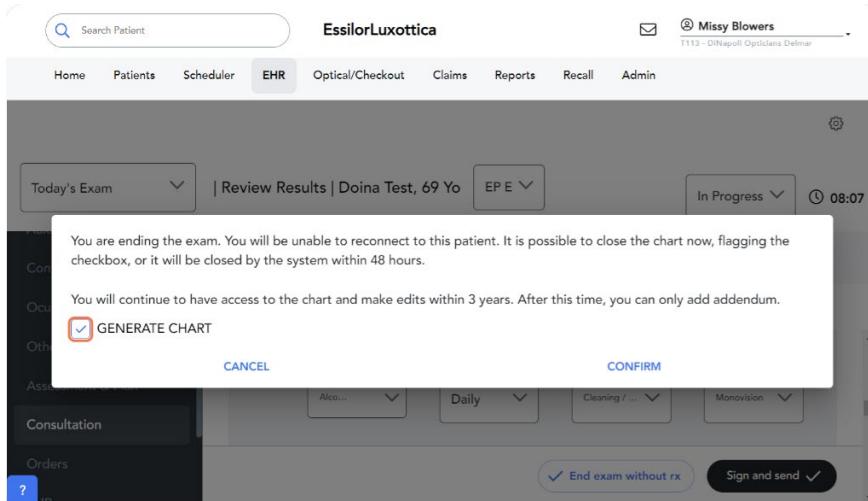


ECLIPS TRAINING GUIDE

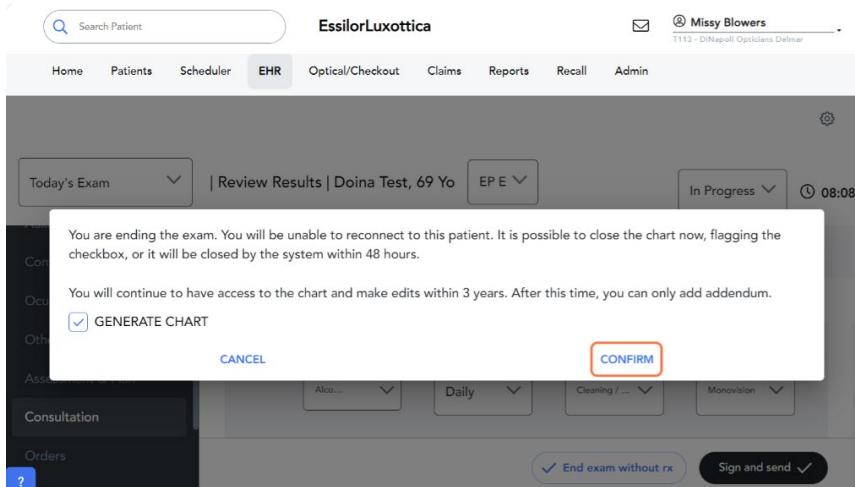
46 Select Sign and Send.



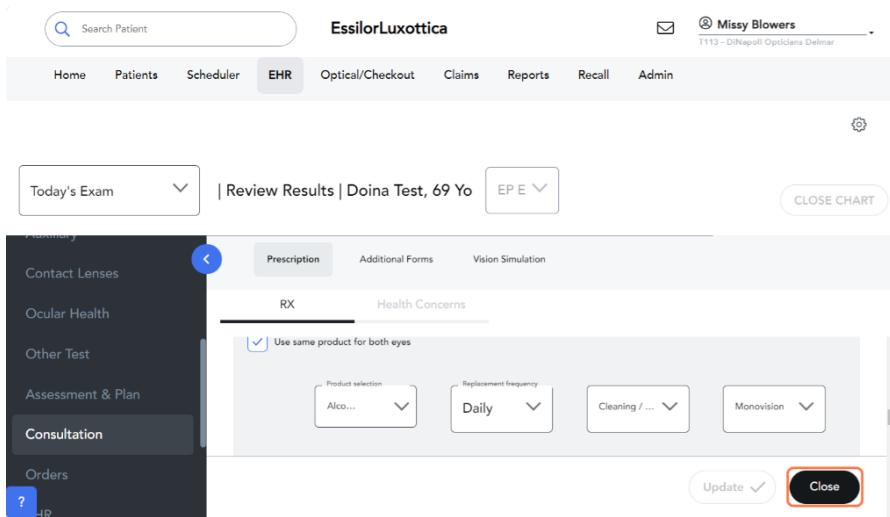
47. Select Generate Chart.



48. Select confirm.



49. Click on Close



50. Print Rx by going to documents

51. Select the appropriate prescriptions and open the document

52. Select Print

***Important note:**

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

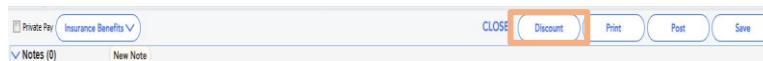
- ✓ **All diagnosis codes are entered into the system**
- ✓ **All billing codes are entered and checked as “Ready for Billing” Rx has been Signed and Sent**
- ✓ **Chart Closed or Generate Chart**

Section 6 Invoicing and Checking out in Eclips

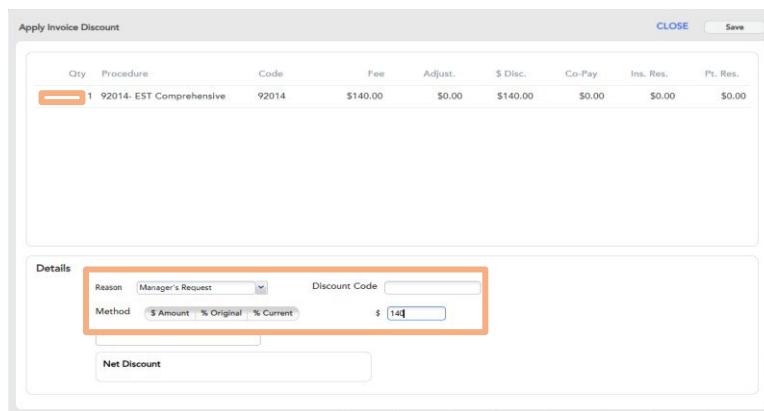
1. Access The Patient Either From The PATIENT By Selecting INVOICE Or OPTICAL CHECKOUT TAB By Selecting The Patient And Then ADD INVOICE
2. Upon Completion Of The Eye Exam, Your Doctor Will Send Over Procedural And Diagnosis Codes.
3. If They Do Not Come Over, Or You Need Add Additional Services, You can Manually Enter By Using The Pull-down Bars And The Professional Services Button On The Bottom Left Side Of The Pop-up Window
4. If you need to delete a service, select the hamburger on the right side



5. For All Routine & Non-insurance Patients, Select The Discount Button To Zero Out The Invoice



6. Once discount window pops up, select the item(s) you want to discount and fill out the reason, \$ or %, and how much
7. Select save when finished



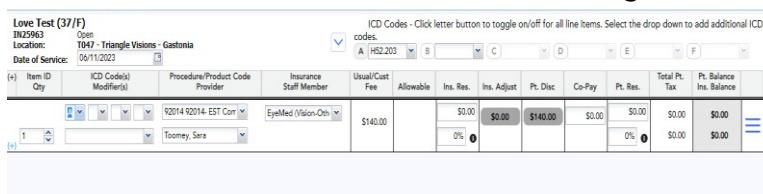
- 8 .Post To Account & Proceed To Process/Bill In Ciao!
9. When prompted about recall, select YES



10. Refer To Insurance Binder If You Have Questions Regarding Routine Plans

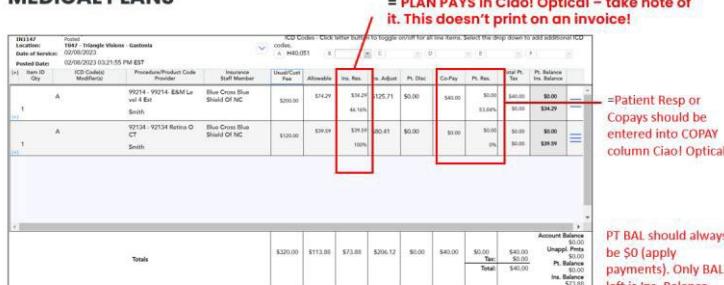
Invoicing Medical Insurance

1. Access The Patient Either From The PATIENT By Selecting INVOICE Or OPTICAL CHECKOUT TAB By Selecting The Patient And Then ADD INVOICE
2. Upon Completion Of The Eye Exam, Your Doctor Will Send Over Procedural And Diagnosis Codes.
3. If They Do Not Come Over, Or You Need Add Additional Services, You Can Manually Enter By Using The Pull-down Bars And The Professional Services Button On The Bottom Left Side Of The Pop-up Window
4. If you need to delete a service, select the hamburger on the right side



5. For All Medical Insurance Plans, Eclips Will Auto-calculate The Insurance Responsibility

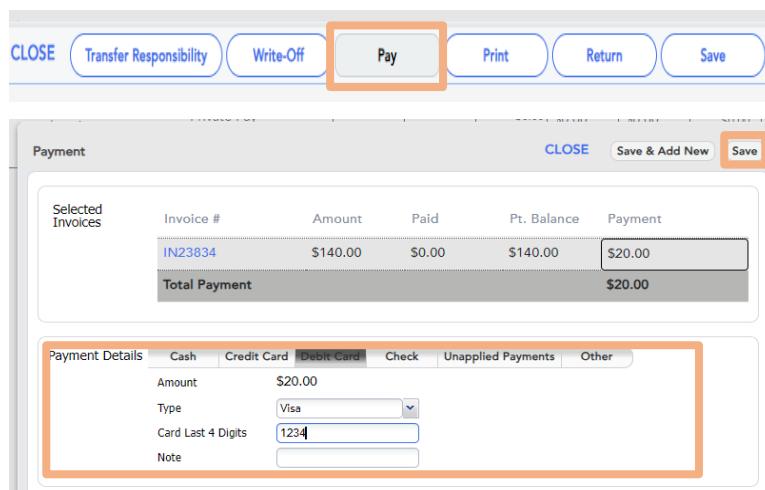
MEDICAL PLANS



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.

6. Record Patient Copay By Selecting The Pay Button And Completing The Payment Details
7. When Prompted About Recall, Select YES



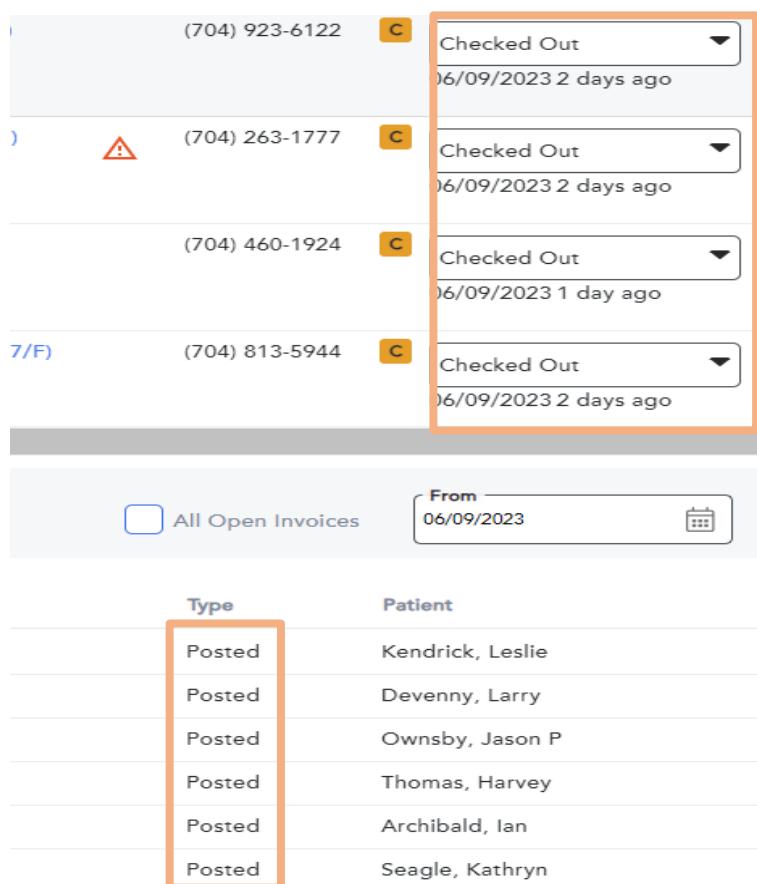
8. Post To Account & Proceed To Process In Ciao!



9. Refer To Insurance Binder If You Have Questions Regarding Medical Plans

FOR ALL PATIENTS (ROUTINE, MEDICAL, NON-INSURANCE) YOU MUST COMPLETE THE FOLLOWING:

10. On The HOME TAB All Patients Should Be Checked Out And All Invoices Posted By The End Of The Day



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 Their Tentative Next Eye Exam By Going Back To The SCHEDULER And Selecting Check Out And Follow The Prompts

ECLiPS TRAINING GUIDE

Knowledge checks:

Please complete the following:

- ✓ Create an Appointment in scheduler.
- ✓ Move/Cancel an appointment.
- ✓ Fill out a DIF.
- ✓ Add Insurance to a test patient (Medical and Routine Vision) * You can enter a test patient as yourself or as your favorite character.
- ✓ Technicians: Pretest a test patient.
- ✓ Doctors: Perform an exam on test patients. Both Routine and medical
- ✓ PCC: Invoice both Private pay and Medical insurance test patient
- ✓ PCC: Schedule pt for NEE also Checkout

Chief Complaint Categories List:

Allergies
Amblyopia
Annual exam
Blurred vision
Blurred vision all distances
Blurred vision at night
Blurred Vision Distance
Blurred Vision Intermediate
Blurred Vision Near
Burning
Cataract evaluation
Color vision
Contact lens dry
Contact lens dry/uncomfortable at end of day
Contact lens evaluation
Contact lens uncomfortable
Contact lens vision fluctuates
Cornea evaluation
Coughing
Diabetic eye evaluation
Discharge
Discomfort/Sore
Distorted vision
Dizziness
Doctor Recommended Return
Double vision
Double vision diagonal
Double vision-horizontal
Double vision-vertical
Dry eye
Dry eye evaluation
Eye Pain
Fever
Flashes
Floaters
Foreign body
General Eye Exam
Glare
Glaucoma evaluation
Glaucoma suspect evaluation

Chief Complaint Categories List:

Halos
Head tilt
Headaches
Here for special testing as ordered
High risk medication evaluation
Imaging review-Duplex carotid scan
Imaging review-MRI/CT
Imaging Review-X-Ray
Interested in contact lenses
Interested in refractive surgery
Itching
Lab review
Lid crusty
Lid drooping
Lid lump or bump
Lid puffy or swollen
Lid stuck together
Lid twitching
Light sensitivity
Loss of side vision
Macula exam
Nausea with vomiting
Nausea without vomiting
Needs CL Rx
Needs Glasses and CL Rx
Needs Rx refill for medication
Needs spectacle Rx
Neuro ophthalmological eval
Ocular Fatigue
Other
Plaquenil testing
Pseudophakic evaluation
Red eye
Retinal evaluation
Retinal-vitreous evaluation
Routine exam
Rx request

Chief Complaint Categories List:

Sandy or Gritty feeling
Shortness of breath
Sneezing
Sudden vision loss
Surgical procedure
Testing review
Transient vision loss
Vision Loss
Watery eyes

Common ICD-10 Codes

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

ECLIPS TRAINING GUIDE

DIABETES - TYPE I (1 = OD, 2 = OS, 3 = OU)		DIABETES - TYPE II (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		42

ECLIPS TRAINING GUIDE

		MOTILITY (1 = OD, 2 = OS, 3 = OU)		LIDS/LACRIMAL (1 = OD, 2 = OS, 3 = OU)						
G43.809	Oc Migraine	H50.01 (1, 2)	Esotropia	H01.11 1	Allerg Derm, RUL	H00.15	Chalazion, LLL	H00.025	Hordeolum Int, LLL	
R51.9	Headache	H50.11 (1, 2)	Exotropia	H01.11 2	Allerg Derm, RLL	H40.12 (1, 2, 3)	Dry Eye Syndrome	H16.22 (1, 2, 3)	K-Sicca, Non-Sjo	
Z79.899	L/T Use of Med	H50.2 (1, 2)	Hypertropia	H01.11 4	Allerg Derm, LUL	H00.011	Hordeolum Ext, RUL	H02.88A	MGD, RUL/RLL	
H53.8	Blurred Vision	H50.51	Esophoria	H01.11 5	Allerg Derm, LLL	H00.012	Hordeolum Ext, RLL	H02.88B	MGD, LUL/LLL	
Z76.5	Malingering	H50.52	Exophoria	H01.00 A	Bleph, RUL/RLL	H00.014	Hordeolum Ext, LUL	H02.40 (1, 2, 3)	Ptosis	
H53.16	Psych Vis Dist	H51.11	Conv. Insuff.	H01.0 OB	Bleph, LUL/LLL	H00.015	Hordeolum Ext, LLL	H02.051	Trichiasis, RUL	
H53.12 (1, 2, 3)	Trans Vis Loss			H00.11	Chalazion, RUL	H00.021	Hordeolum Int, RUL	H02.052	Trichiasis, RLL	
H57.1 (1, 2, 3)	Ocular Pain			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	
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)	Synehchia - 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							

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

Chart Auditing 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