



RevolutionEHR

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Optikam and Spectangle PRO Integration Guide

10/10/2017

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IMPORTANT NOTE: This Integration Guide is designed to provide practices all fundamental information required to perform the setup without assistance. However, if assistance is needed, we request that a call be scheduled with Customer Support. Due to the technical component and time required when assisting practices with device integration, a scheduled call will ensure that the appropriate Subject Matter Expert is available and has sufficient time to provide the help needed. To request a call with a Subject Matter Expert, please email customersupport@revolutionehr.com.

In addition, if you have a device rep coming onsite to help set up any new or existing equipment that will integrate with RevolutionEHR, be sure to email ahead if you believe you will need assistance from RevolutionEHR.



Introduction

RevolutionEHR introduces a direct integration with the OptikamPad application. Using the iPad and the OptikamPad app, opticians take frame and eye measurements and then pull up their active RevolutionEHR patients. Measurements are automatically uploaded to RevolutionEHR and attached to the patient's eyeglass frame order. This Integration Guide provides details on how to configure and use the integration between RevolutionEHR and OptikamPad (or Spectangle PRO).

Contact Information

For help with installation and configuration of the RevolutionEHR please contact:

RevolutionEHR's **Customer Support Phone: 1-877-738-3471 ext. 2**

For help with the iPad application please contact:

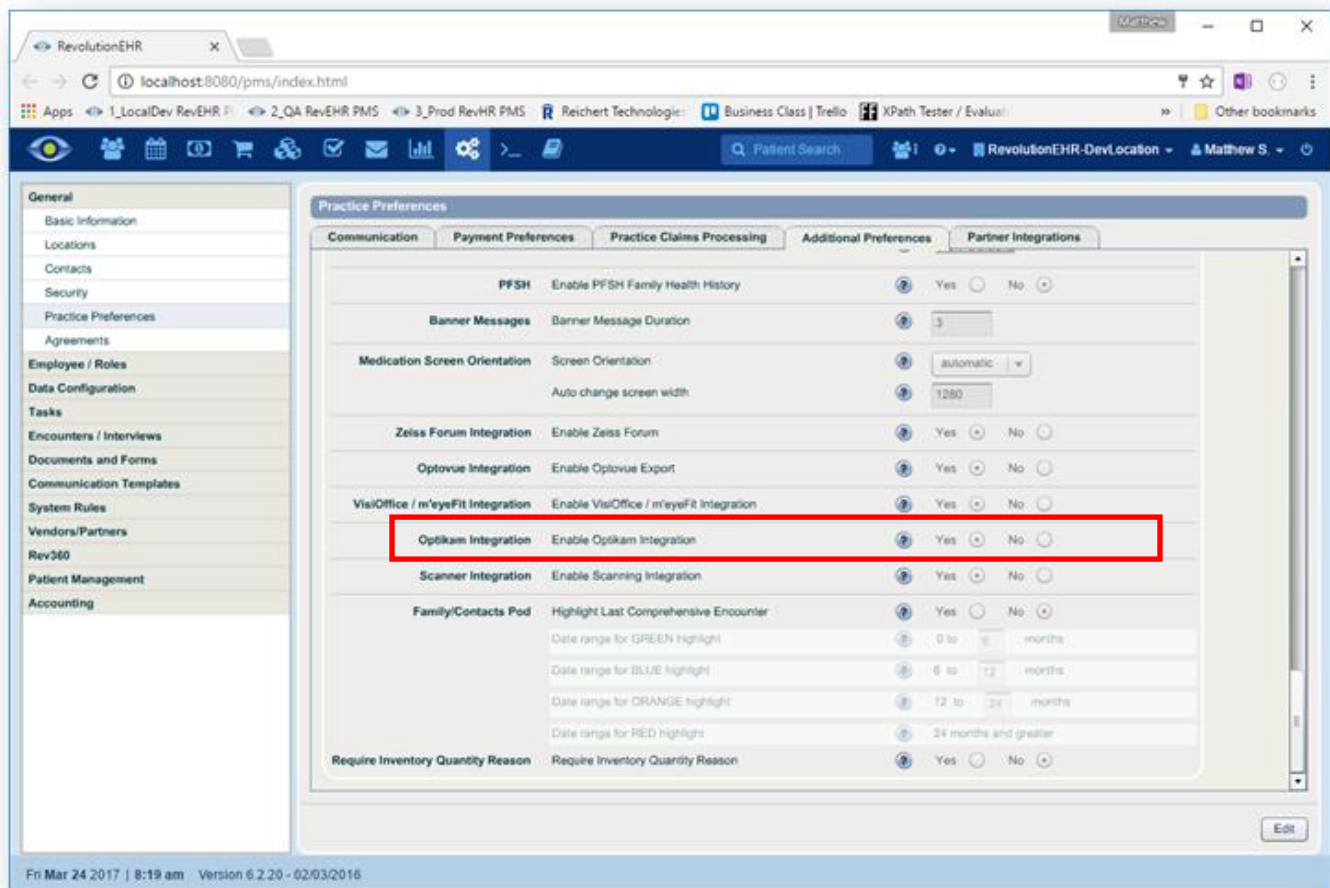
Optikam's **Customer Support Phone: 1-888-356-3311 ext:2**

Optikam's web site: <http://www.optikam.com/>

Optikam's support and user manuals are at: <http://www.optikam.com/support.html>

Step 1: Preparing RevolutionEHR for Integration

From the Administration area of RevolutionEHR, click General, then click Practice Preferences. Scroll down to the Optikam Integration preference. Click Edit, to be able to change these settings, then click Enable Optikam Integration equal to Yes.

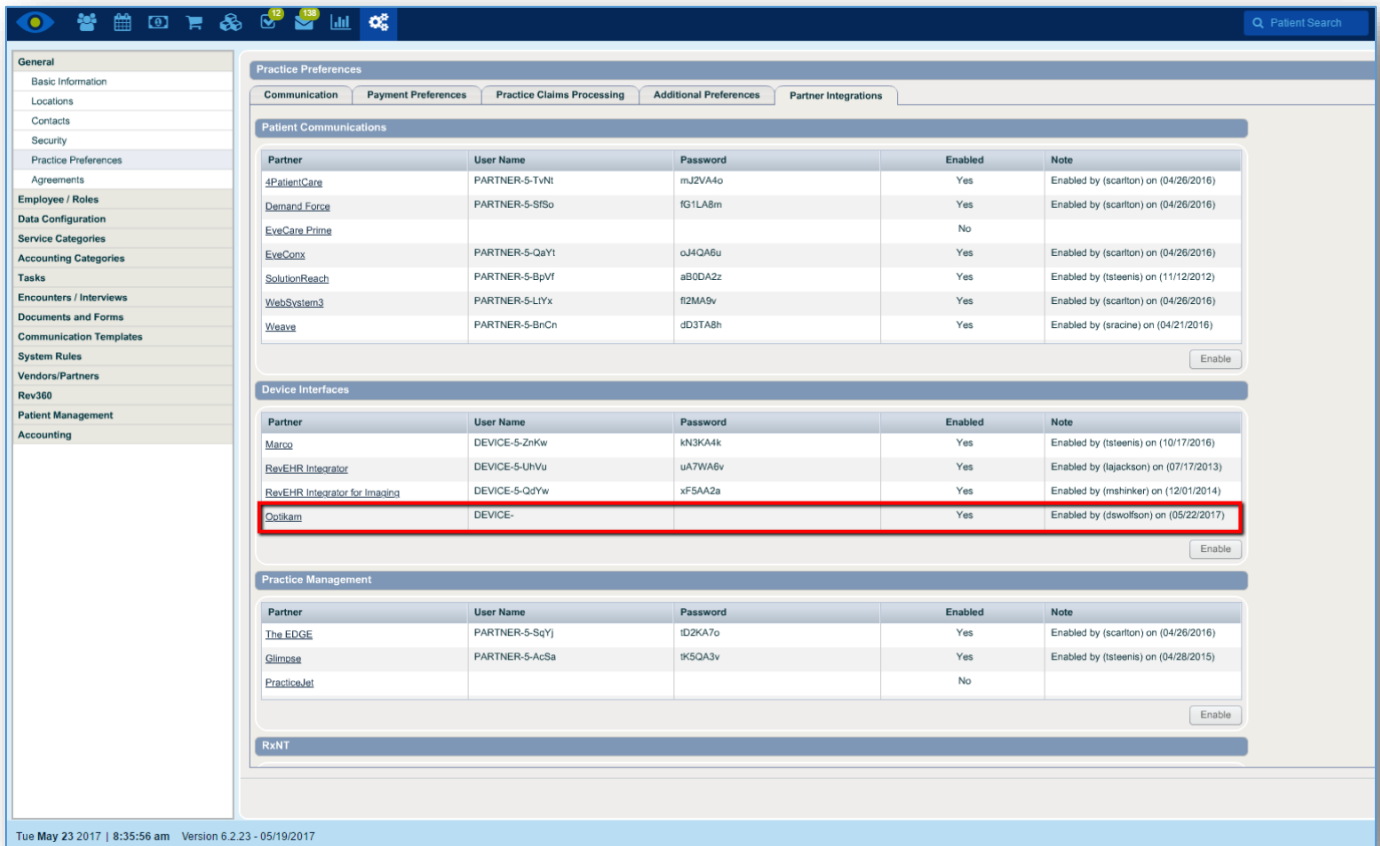


The screenshot shows the RevolutionEHR web interface. On the left is a navigation menu with categories like General, Basic Information, Locations, Contacts, Security, Practice Preferences (selected), Agreements, Employee / Roles, Data Configuration, Tasks, Encounters / Interviews, Documents and Forms, Communication Templates, System Rules, Vendors/Partners, Rev360, Patient Management, and Accounting. The main content area is titled 'Practice Preferences' and has tabs for Communication, Payment Preferences, Practice Claims Processing, Additional Preferences, and Partner Integrations. The 'Optikam Integration' row is highlighted with a red box. The 'Yes' radio button is selected.

Category	Setting	Value
PFSH	Enable PFSH Family Health History	Yes
Banner Messages	Banner Message Duration	3
Medication Screen Orientation	Screen Orientation	automatic
	Auto change screen width	1280
Zeiss Forum Integration	Enable Zeiss Forum	Yes
Optovue Integration	Enable Optovue Export	Yes
VisiOffice / m'eyeFit Integration	Enable VisiOffice / m'eyeFit Integration	Yes
Optikam Integration	Enable Optikam Integration	Yes
Scanner Integration	Enable Scanning Integration	Yes
Family/Contacts Pod	Highlight Last Comprehensive Encounter	Yes
	Date range for GREEN highlight	0 to 6 months
	Date range for BLUE highlight	6 to 12 months
	Date range for ORANGE highlight	12 to 24 months
	Date range for RED highlight	24 months and greater
Require Inventory Quantity Reason	Require Inventory Quantity Reason	Yes

At the bottom right of the form is an 'Edit' button. The footer of the browser window shows 'Fri Mar 24 2017 | 8:19 am - Version 6.2.20 - 02/03/2016'.

On the Partner Integration screen, then under the Device Interfaces section, enable Optikam and new credentials will be generated and displayed. Take note of these Optikam credentials, we'll need them in the next step.



The screenshot shows the 'Partner Integrations' tab in the 'Practice Preferences' section. The 'Device Interfaces' table lists various partners and their integration status. The 'Optikam' entry is highlighted with a red box.

Partner	User Name	Password	Enabled	Note
4PatientCare	PARTNER-5-TvNt	mJ2VA4o	Yes	Enabled by (scarlton) on (04/26/2016)
Demand Force	PARTNER-5-SfSo	fG1LA8m	Yes	Enabled by (scarlton) on (04/26/2016)
EveCare Prime			No	
EveConn	PARTNER-5-QaYt	oJ4QA6u	Yes	Enabled by (scarlton) on (04/26/2016)
SolutionReach	PARTNER-5-BpVf	aB0DA2z	Yes	Enabled by (steeenis) on (11/12/2012)
WebSystem3	PARTNER-5-LtYx	fZMA9v	Yes	Enabled by (scarlton) on (04/26/2016)
Weave	PARTNER-5-BnCb	dD3TA8h	Yes	Enabled by (sracine) on (04/21/2016)
Marco	DEVICE-5-ZnKw	kN3KA4k	Yes	Enabled by (steeenis) on (10/17/2016)
RevEHR Integrator	DEVICE-5-UhVu	uA7WA6v	Yes	Enabled by (lajackson) on (07/17/2013)
RevEHR Integrator for Imaging	DEVICE-5-QdYw	xF5AA2a	Yes	Enabled by (mahinker) on (12/01/2014)
Optikam	DEVICE-		Yes	Enabled by (dswolfson) on (05/22/2017)

The 'Optikam' entry is highlighted with a red box.

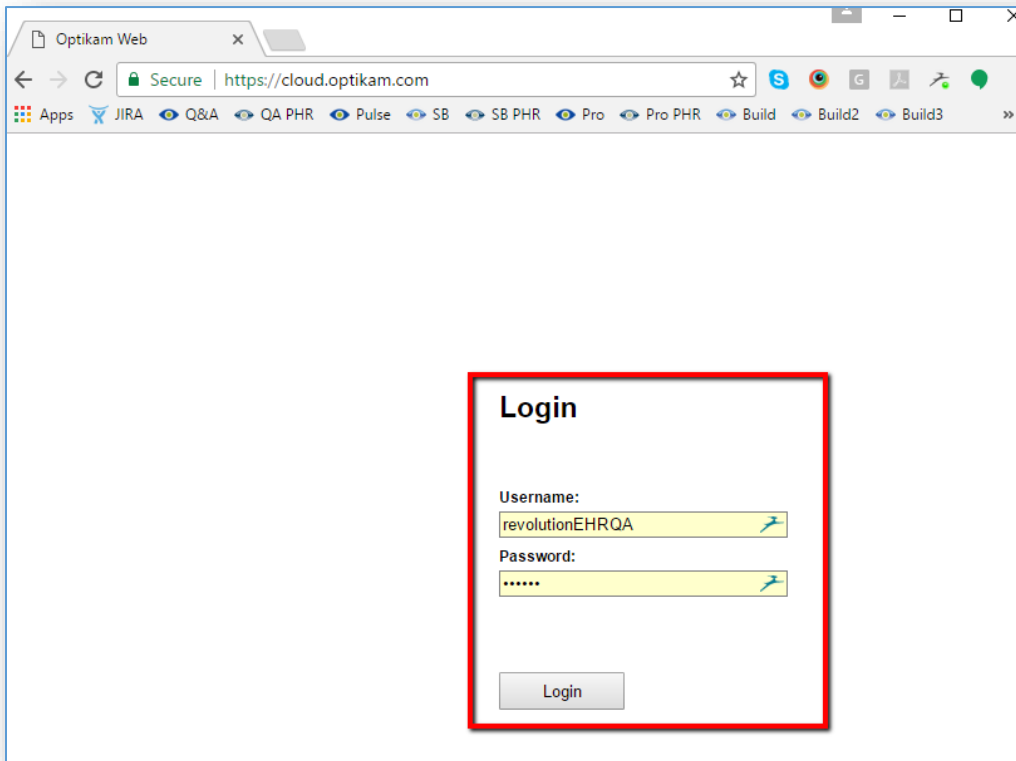
Step 2: Preparing Optikam for Integration

We refer you to the OptikamPad User Manual for the setup and configuration of the OptikamPad iPad application. On the initial launch of the iPad application, the user will be guided through the OptikamPad Initial Setup wizard. This integration guide assumes that the OptikamPad system is up and running. Now we need to get the integration configured and working.

Log into Optikam's Cloud Portal web site at: <https://cloud.optikam.com> to turn on and configure the integration with RevolutionEHR. These credentials will be provided to you by Optikam, because this is your Optikam cloud account.

Note: For accounts that have purchased the **Spectangle PRO**, the steps shown in this integration document are identical to the OptikamPad.

** For accounts that have purchased the Spectangle PRO, the steps shown in this integration document are identical to the OptikamPad.



The screenshot shows a web browser window titled "Optikam Web" with the address bar displaying "Secure | https://cloud.optikam.com". The browser's toolbar includes various icons and a list of tabs: Apps, JIRA, Q&A, QA PHR, Pulse, SB, SB PHR, Pro, Pro PHR, Build, Build2, and Build3. The main content area of the browser displays a "Login" form, which is highlighted by a red rectangular border. The form contains the following elements:

- Login** (Section Header)
- Username:** A text input field containing "revolutionEHRQA" and a small blue icon to its right.
- Password:** A password input field with masked characters "*****" and a small blue icon to its right.
- Login** (Submit Button)

Navigate by clicking Account, then Brand and Integration and finally Edit (indicated by red boxes in the screenshot below). If you do NOT see the Brand and Integration options, contact Optikam's Customer Support at **1-888-356-3311 ext:2** and ask them to enable the Lens Ordering API. The detailed settings and instructions are listed on the following pages.

Integration (choose from the list provided):

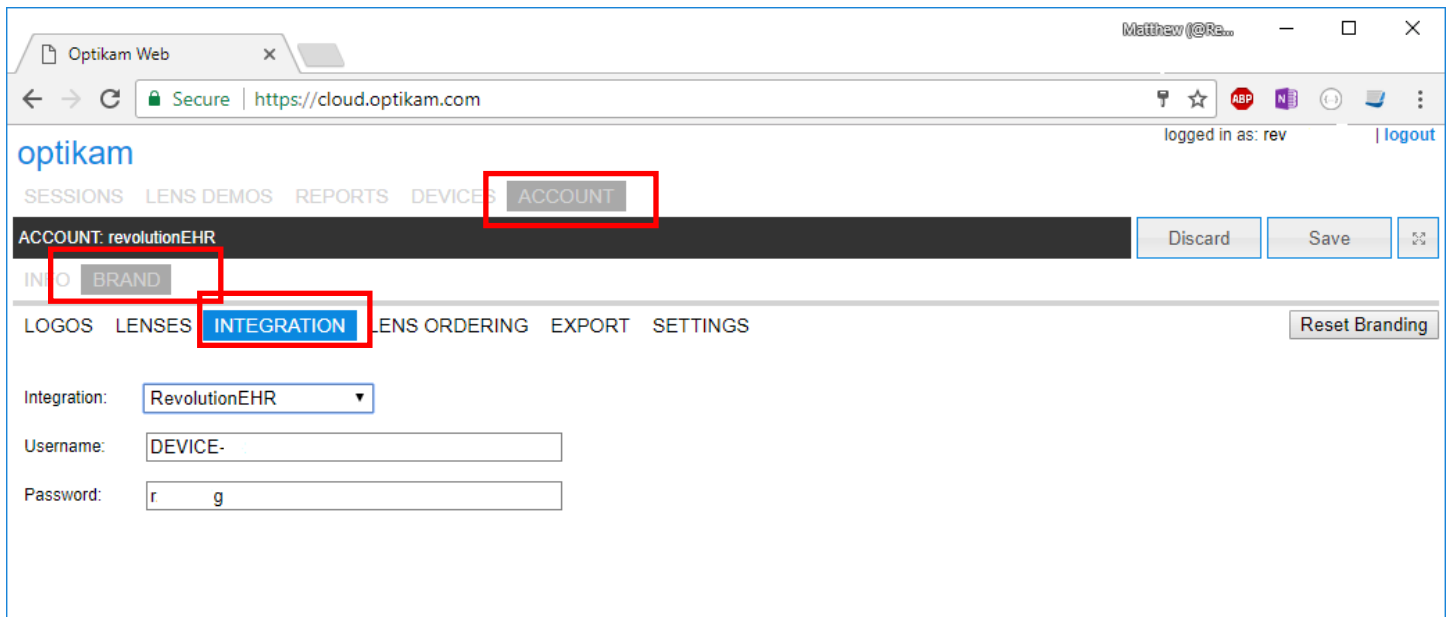
RevolutionEHR – for U.S. Production

RevolutionEHR Canada – for Canada Production

Custom – only if explicitly instructed by Customer Support or used for beta testing

Username:

Password:



Matthew (@Re...

Optikam Web x

Secure | https://cloud.optikam.com

logged in as: rev | [logout](#)

optikam

SESSIONS LENS DEMOS REPORTS DEVICES **ACCOUNT**

ACCOUNT: revolutionEHR Discard Save

INFO **BRAND**

LOGOS LENSES **INTEGRATION** LENS ORDERING EXPORT SETTINGS Reset Branding

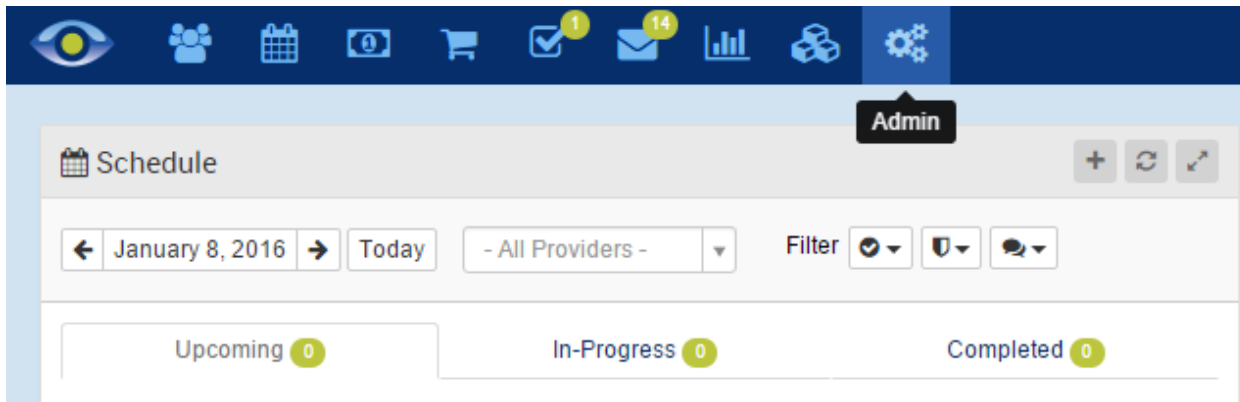
Integration: RevolutionEHR

Username: DEVICE-

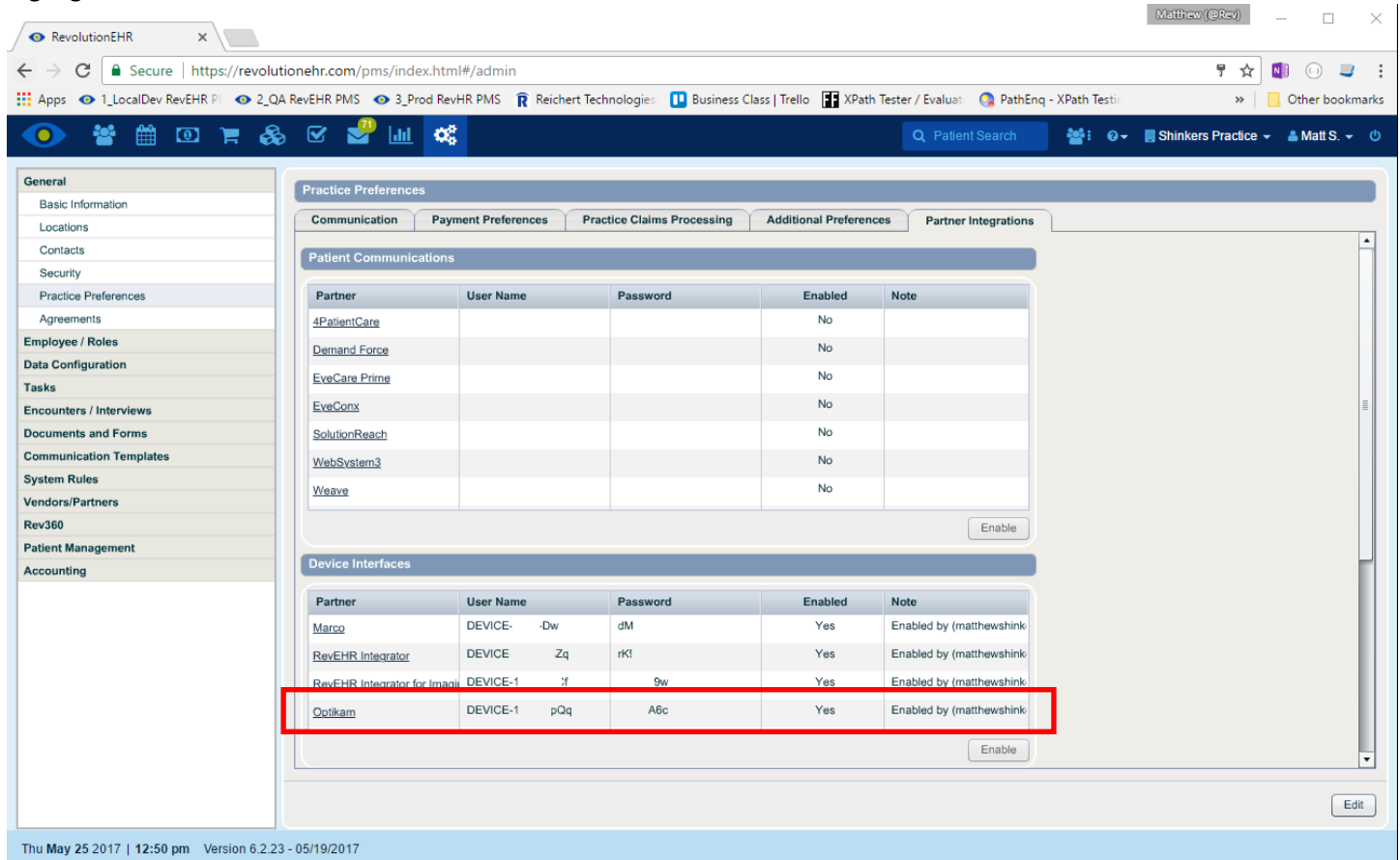
Password: r g

The Username and Password displayed above are supplied by RevolutionEHR and detailed instructions are below.

Either follow Step 1 from above, or to obtain your RevolutionEHR's Partner integration credentials log into RevolutionEHR as an Administrator. The Username, Password and Location Id is obtained by logging into the RevolutionEHR web application, then click Admin.



Visit General > Practice Preferences. On the Partner Integration tab, you will see a “Device Interfaces” section that will list the various device interfaces. Obtain the Username and Password from the Partner entry labeled Optikam, highlighted in the screenshot below:



Partner	User Name	Password	Enabled	Note
4PatientCare			No	
Demand Force			No	
EveCare Prime			No	
EveConx			No	
SolutionReach			No	
WebSystem3			No	
Weave			No	
Marco	DEVICE- -Dw	dM	Yes	Enabled by (matthewshink
RevEHR Integrator	DEVICE Zq	rK!	Yes	Enabled by (matthewshink
RevEHR Integrator for Imagi	DEVICE-1 :f	9w	Yes	Enabled by (matthewshink
Optikam	DEVICE-1 pQq	A6c	Yes	Enabled by (matthewshink

If not enabled, select the Optikam row and press the Enable button. It will then appear something like this:

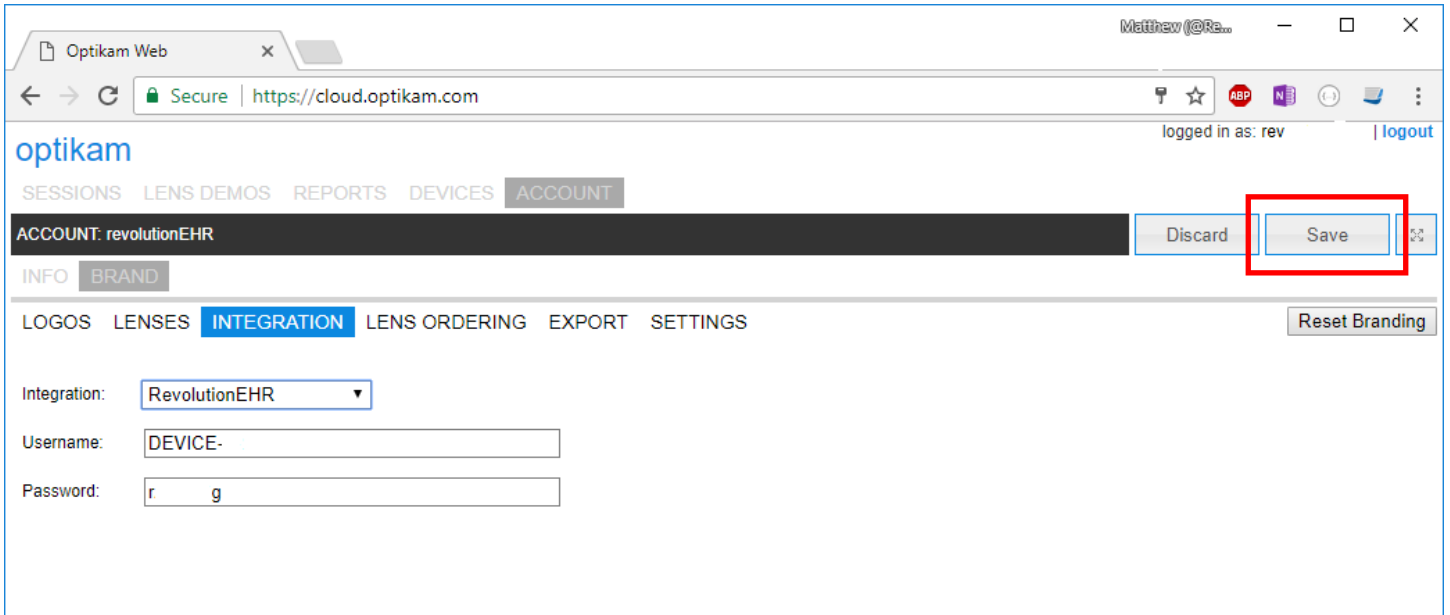
Device Interfaces

Partner	User Name	Password	Enabled	Note
Marco	DEVICE- .Dw	dM	Yes	Enabled by (matthewshink
RevEHR Integrator	DEVICE Zq	rK!	Yes	Enabled by (matthewshink
RevEHR Integrator for Imagi	DEVICE-1 :f	9w	Yes	Enabled by (matthewshink
Optikam	DEVICE-1 pQq	A6c	Yes	Enabled by (matthewshink

Enable

You can then cut-n-paste the username and password fields from the grid into the Username and Password fields in the Optikam cloud Integration page.

After completing the Integration settings click Save in the upper right hand corner to save these changes.



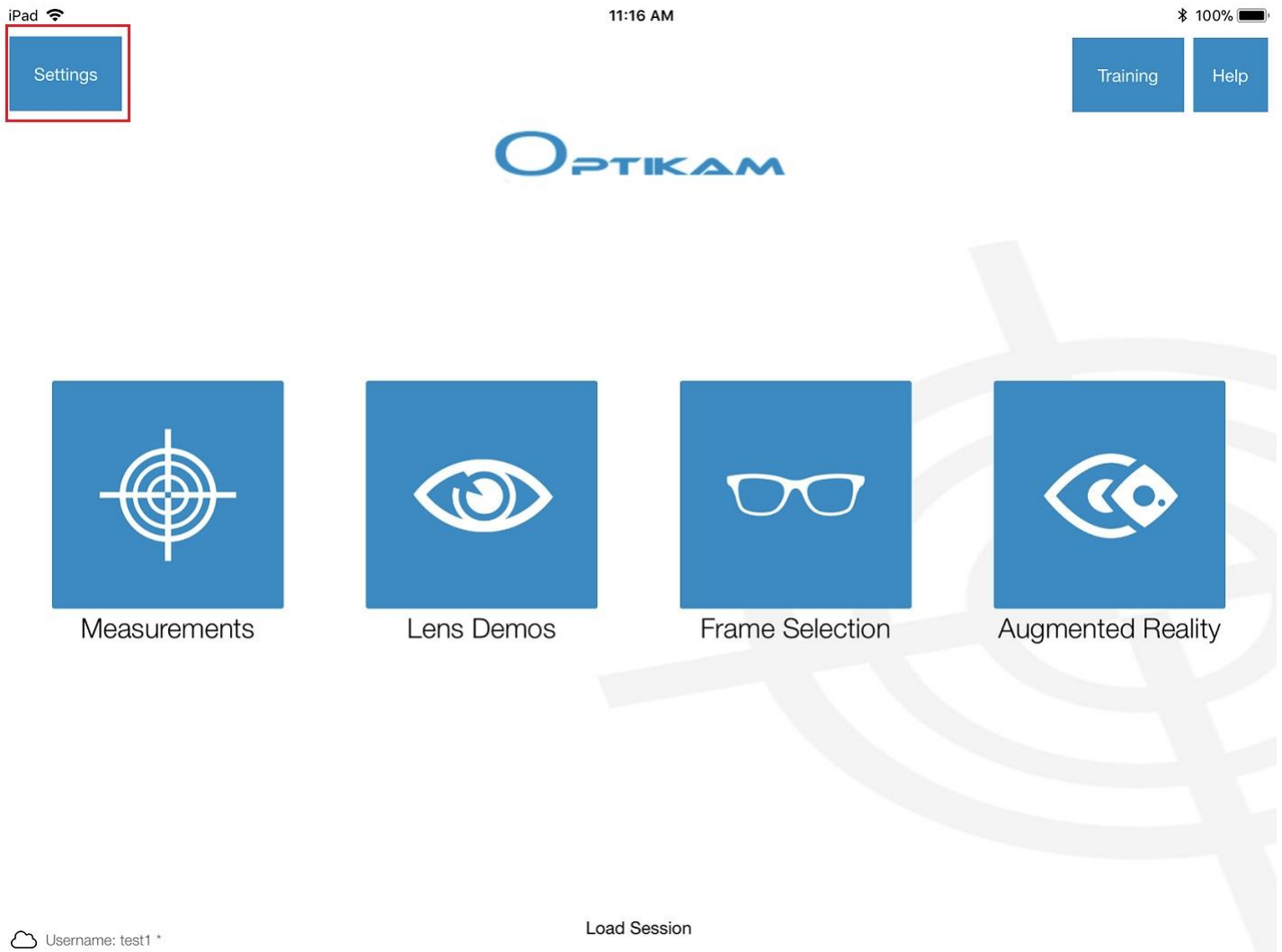
The screenshot shows a web browser window with the URL <https://cloud.optikam.com>. The page is titled "optikam" and shows the user is logged in as "rev". The navigation menu includes "SESSIONS", "LENS DEMOS", "REPORTS", "DEVICES", and "ACCOUNT". The "ACCOUNT" section is active, showing "ACCOUNT: revolutionEHR". Below this, there are tabs for "INFO" and "BRAND". The "INTEGRATION" tab is selected, showing fields for "Integration:" (set to "RevolutionEHR"), "Username:" (set to "DEVICE-"), and "Password:" (set to "r. g"). The "Save" button is highlighted with a red box.

Note: Any time changes are made in Optikam's Integration settings, stop the OptikamPad iPad app and then relaunch it. The new settings will be read and take effect. This completes the configuration of Optikam's settings.

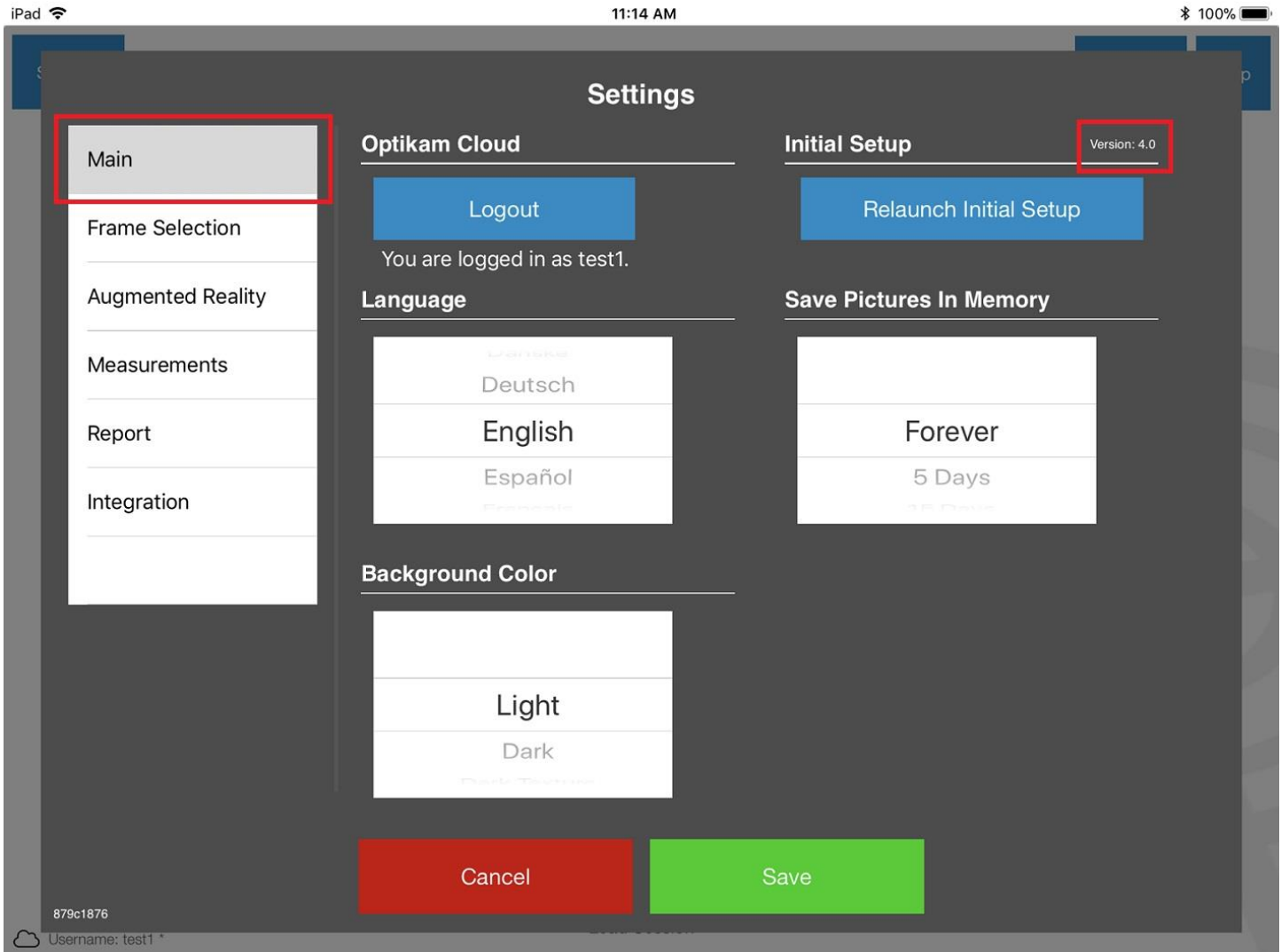
Step 3: Testing the OptikamPad app – New Measurements

Switching now to the Apple iPad and the OptikamPad or Spectangle Pro iPad app installed there. The integration requires Version 4.0+ of the app to function properly . The app version can be found in Settings->Main in the top right corner. If your app version is older than what is required, visit the App Store to update.

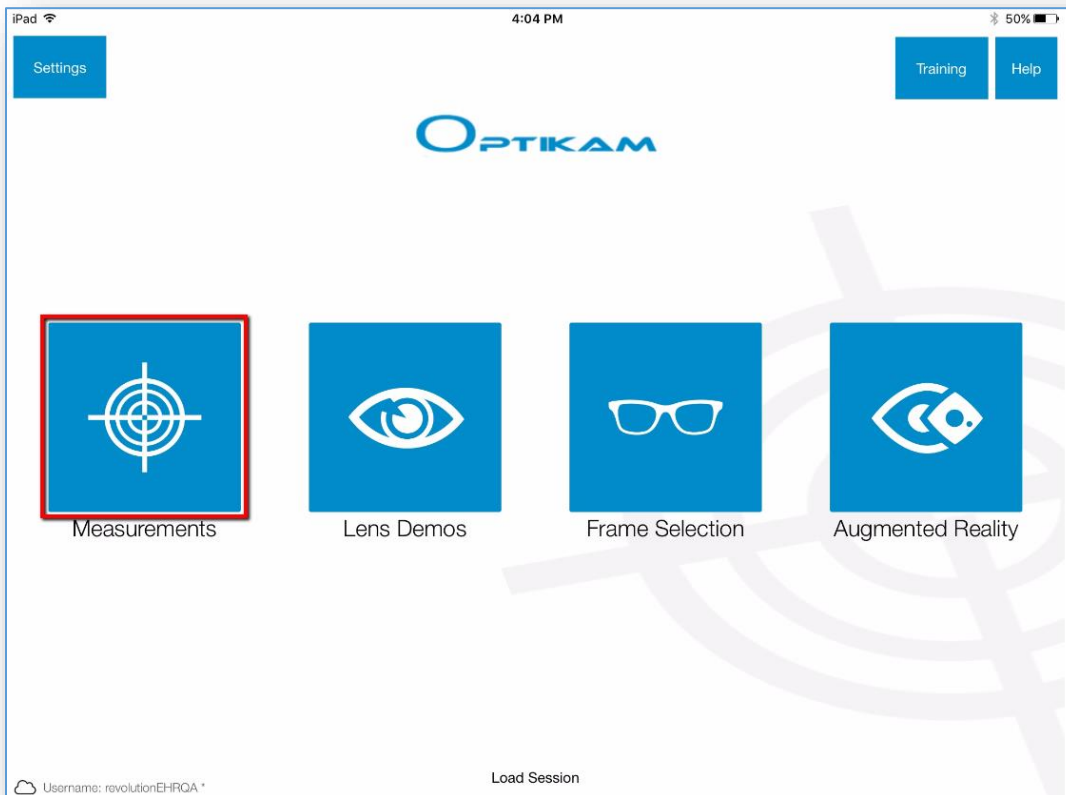
To check the current version number, tap the Settings button in the upper left hand corner of the iPad app.



From the Settings screen, the version number is displayed in the upper right hand corner. If the version number is below 4.0, visit the App Store to update to the latest version.

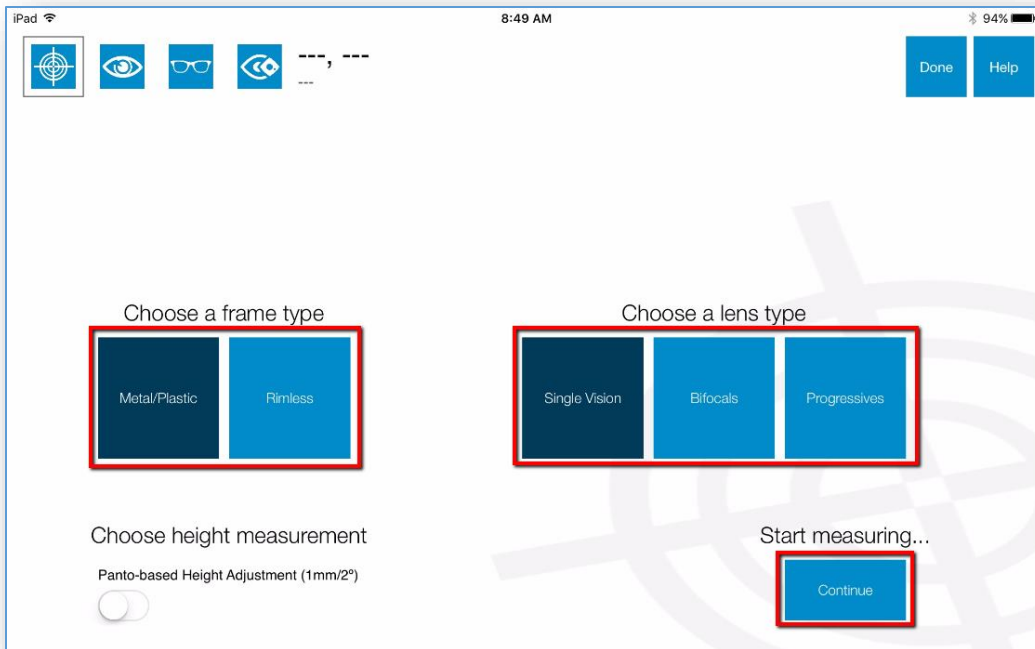


After checking for the latest version if the iPad app is currently running shut it down and re-start the iPad app. Wait a few seconds and then relaunch the Optikam app. To use the integration with a new measurement, tap Measurements:

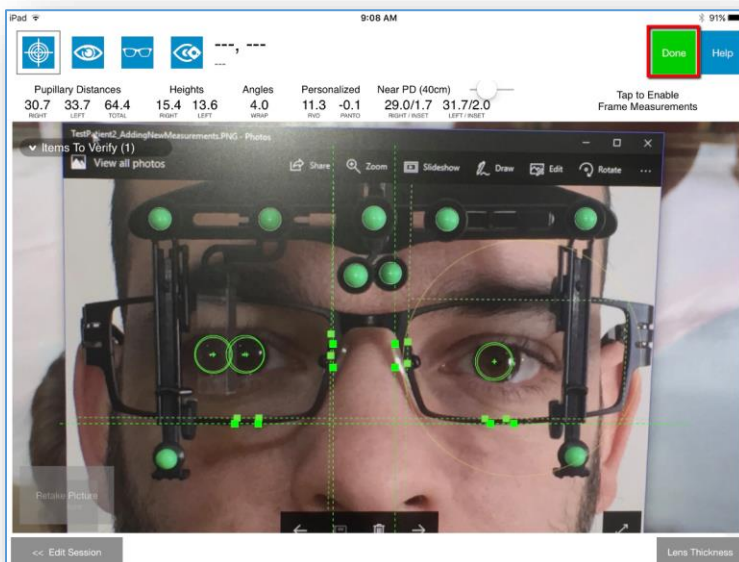


Note: The account that's being used is displayed in the lower left corner. When using this app, you'll be logged into your Optikam cloud account and the Integration settings (entered in Step 1) get applied to this iPad. Any time a setting is changed on the Optikam's Cloud Portal site, the OptikamPad app must be closed and then relaunched.

Tap to select a frame and lens type, then tap Continue:



After adjusting measurements as necessary, tap done:



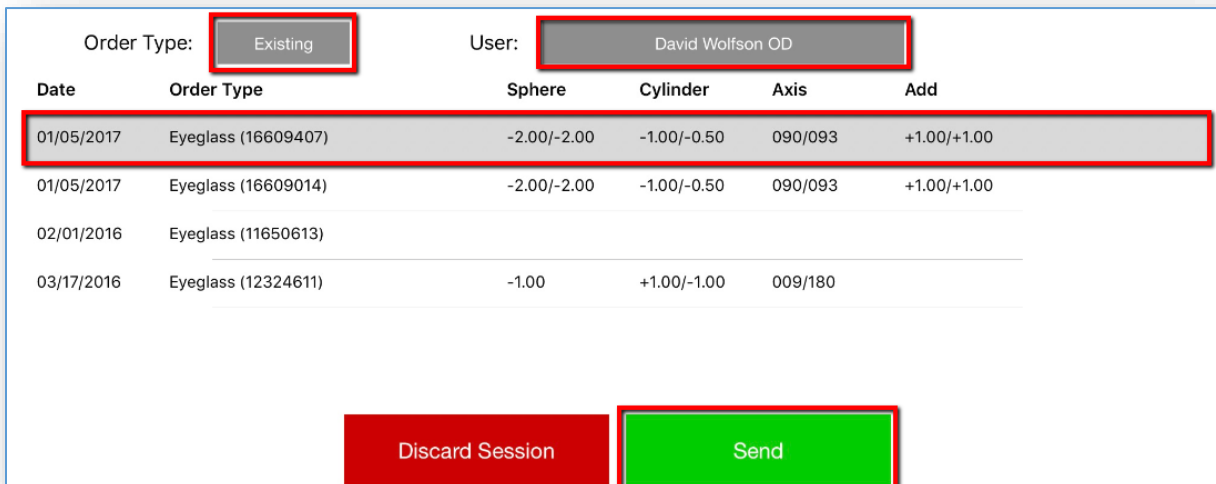
Patients from RevolutionEHR can be searched by last name with the Customer Search field, then tap to select a patient:



Customer Search: Search

Customer #	Last Name	First Name	Birth Date	Gender
35878974	Test	Bobby	07/03/1969	m
38276600	Test	Child01	01/08/2012	f
30360149	Test	Cory	01/30/1973	m
29870053	Test	Heather	06/12/2001	f
29998835	Test	Jacob	04/18/2004	m
31297004	Test	Mari	12/06/2015	f

Once a patient is selected, any New or Approved eyeglass orders from RevolutionEHR will appear below. If Order Type is set to Existing, select a User, tap an order, and tap Send to transmit the measurements:



Order Type: User:

Date	Order Type	Sphere	Cylinder	Axis	Add
01/05/2017	Eyeglass (16609407)	-2.00/-2.00	-1.00/-0.50	090/093	+1.00/+1.00
01/05/2017	Eyeglass (16609014)	-2.00/-2.00	-1.00/-0.50	090/093	+1.00/+1.00
02/01/2016	Eyeglass (11650613)				
03/17/2016	Eyeglass (12324611)	-1.00	+1.00/-1.00	009/180	

If Order Type is set to New, any orders will be replaced with the Frame Information section. Select a User, enter Frame Information, and tap Send to transmit the measurements:

Order Type: New
User: David Wolfson OD

Frame Information (Collection / Model)
Test Frame

Discard Session
Send

If Order Type is set to None, orders cannot be selected. Taping Save does not transmit the measurements, but does save the Optikam session:

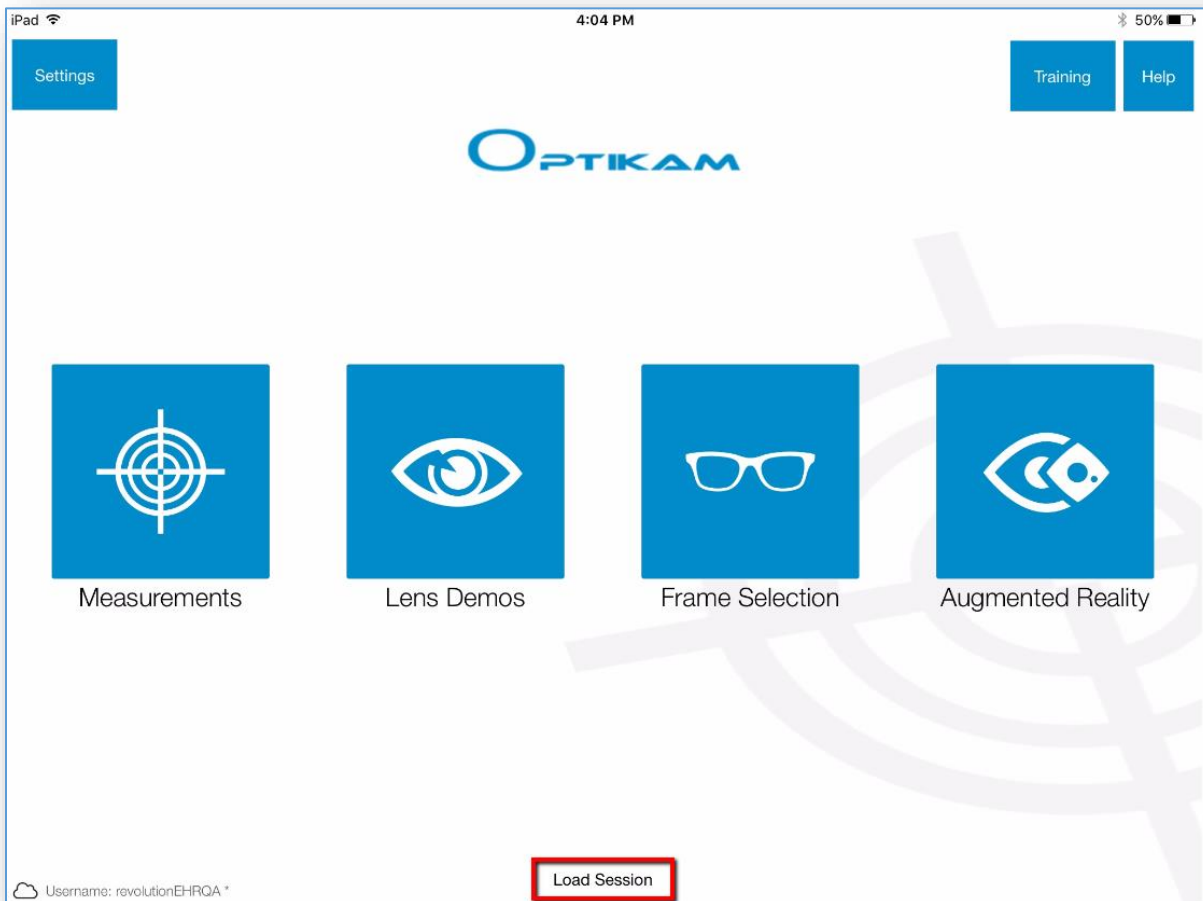
Order Type: None

Date	Order Type	Sphere	Cylinder	Axis	Add
01/05/2017	Eyeglass (16609407)	-2.00/-2.00	-1.00/-0.50	090/093	+1.00/+1.00
01/05/2017	Eyeglass (16609014)	-2.00/-2.00	-1.00/-0.50	090/093	+1.00/+1.00
02/01/2016	Eyeglass (11650613)				
03/17/2016	Eyeglass (12324611)	-1.00	+1.00/-1.00	009/180	

Discard Session
Save

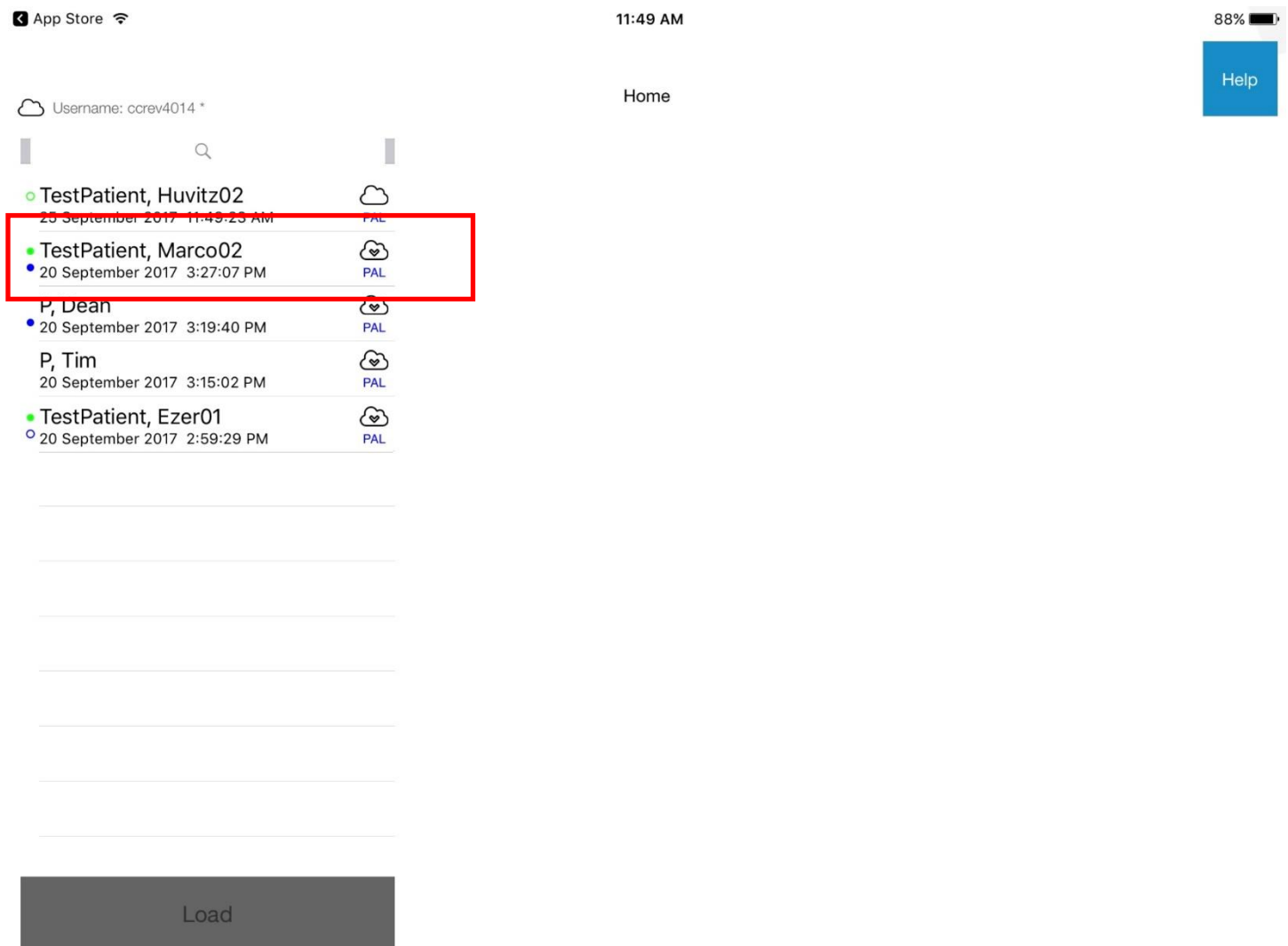
Step 4: Testing OptikamPad app – Previous Sessions

You can load an existing measurement session by tapping the Load Session option:



A list of measurement sessions appears along the left side of the screen.

The two dots along the left side of saved measurement profiles represent the order status of the integration (Green) and the lens ordering (Purple) respectively. An empty circle indicates that the order has yet to be placed. A full circle indicates the completion of the order. An empty circle is generated by selecting None as the Order Type. The user can return at a later time to complete the order.



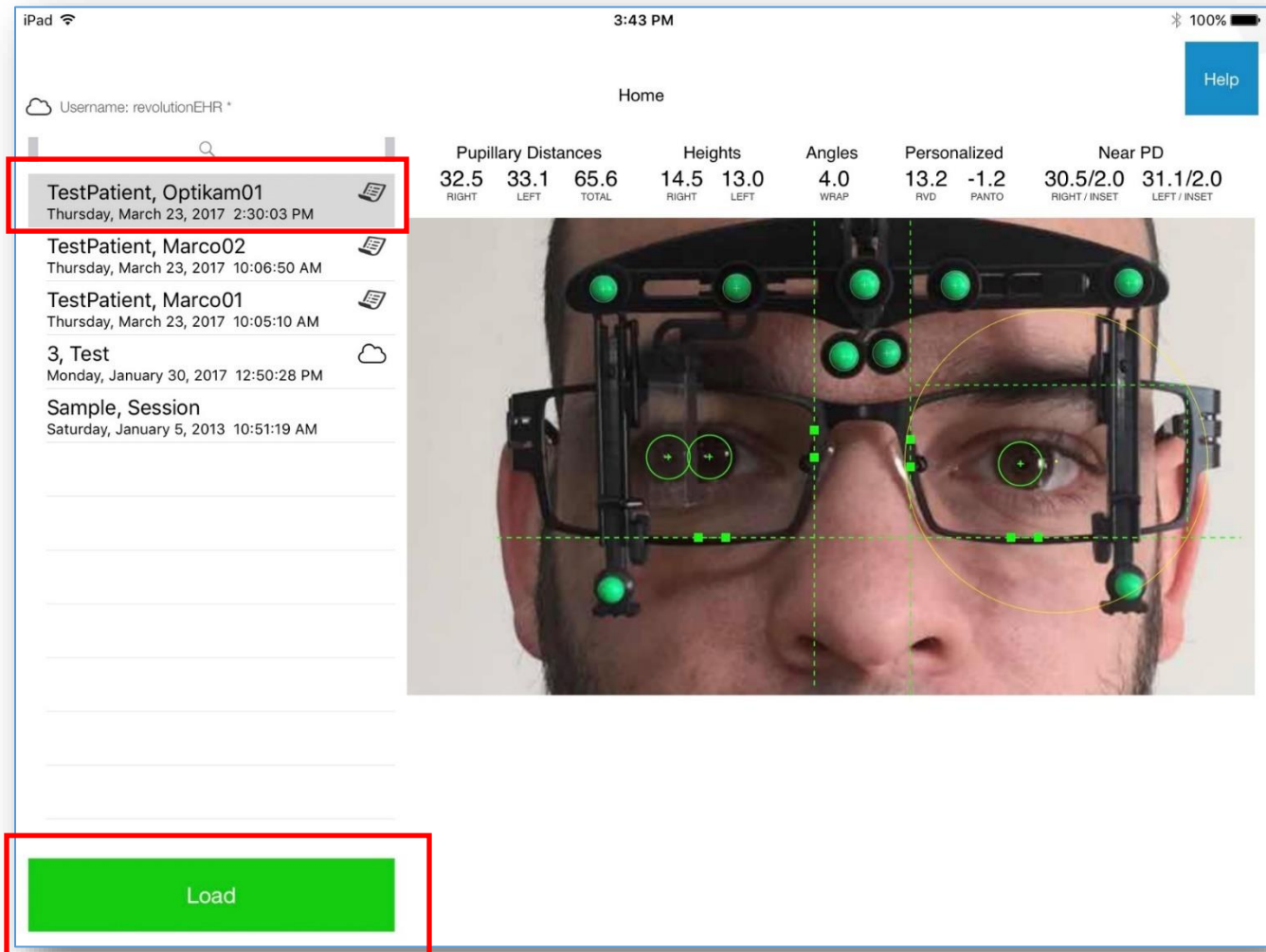
App Store 11:49 AM 88%

Username: ccrev4014 * Home Help

Patient Name	Date	Time	Status
TestPatient, Huvitz02	25 September 2017	11:43:23 AM	PAL
TestPatient, Marco02	20 September 2017	3:27:07 PM	PAL
P, Dean	20 September 2017	3:19:40 PM	PAL
P, Tim	20 September 2017	3:15:02 PM	PAL
TestPatient, Ezer01	20 September 2017	2:59:29 PM	PAL

Load

Tapping on a patient, in the list, a preview is displayed. Tap the Load button.



The patient's measurement session is loaded. Tap the green done button in the upper right-hand corner of the screen.

iPad 3:43 PM 100%

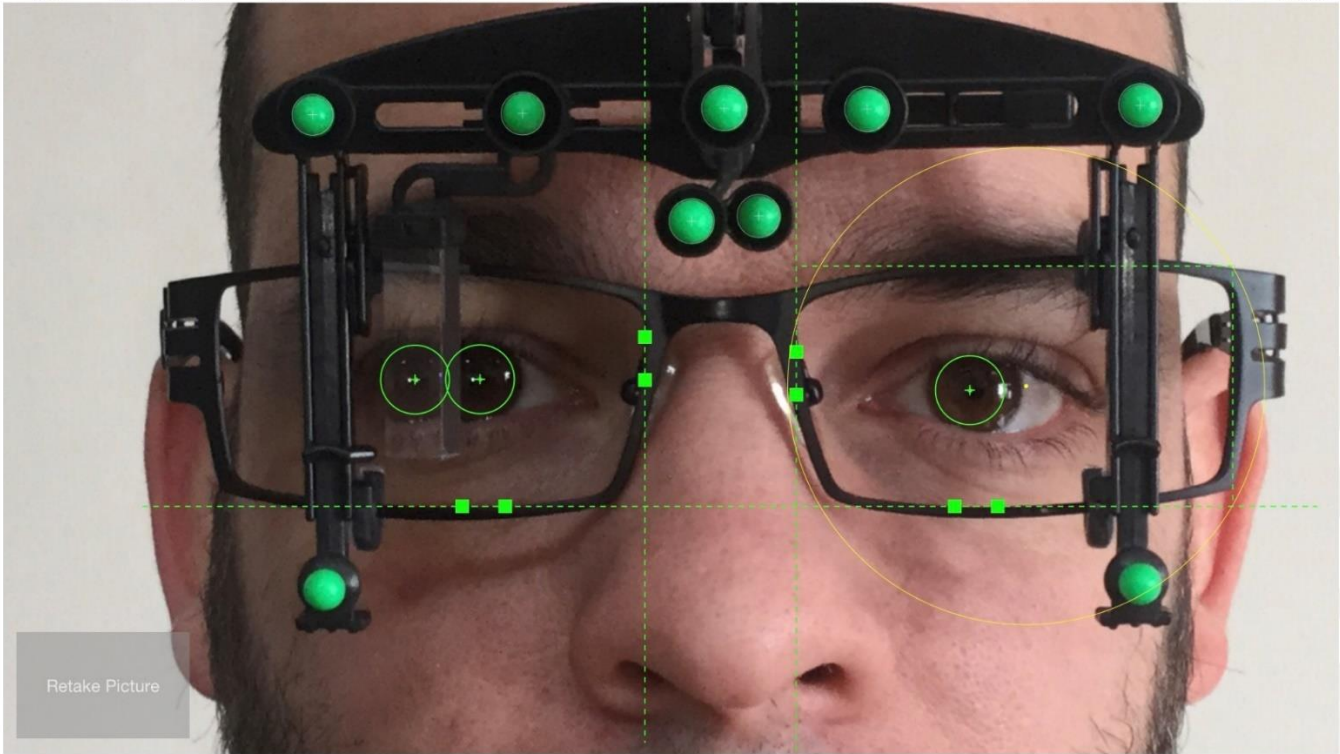
TestPatient, Optikam01
March 23, 2017

Done **Help**

Pupillary Distances			Heights		Angles	Personalized		Near PD (40cm)		Frame Measurements (Tap To Disable)			
RIGHT	LEFT	TOTAL	RIGHT	LEFT	WRAP	RVD	PANTO	RIGHT / INSET	LEFT / INSET	A VALUE	B VALUE	ED VALUE	DBL VALUE
32.5	33.1	65.6	14.5	13.0	4.0	13.2	-1.2	30.5/2.0	31.1/2.0	55.8	31.2	60.5	17.9

Retake Picture

<< Edit Session Lens Package Lens Thickness



The screen below will be displayed. This screen is populated with data from RevolutionEHR. Selecting an Order Type of Existing, displays a list of Orders associated with the patient. After making selection on this screen, tap the Send button and the measurements will be sent to that order in RevolutionEHR.

iPad

3:43 PM

100%

Customer

First name: Optikam01

Last name: TestPatient

Order Type: Existing

User: <User>

Date	Order Type	Sphere	Cylinder	Axis	Add
03/23/2017	Eyeglass		+2.25/+2.00	-0.50/+0.00	168 +1.00/+1.00

Discard Session

Send

The User dropdown is populated with the practice's active employees (right-hand side of the screen below):

Customer

First name: Optikam01

Last name: TestPatient

Order Type: Existing

User: <User>

Date	Order Type	Sphere	Cylinder
03/23/2017	Eyeglass		+2.25

Users

Test Provider01

Revapp Revolution

Matthew Shinker

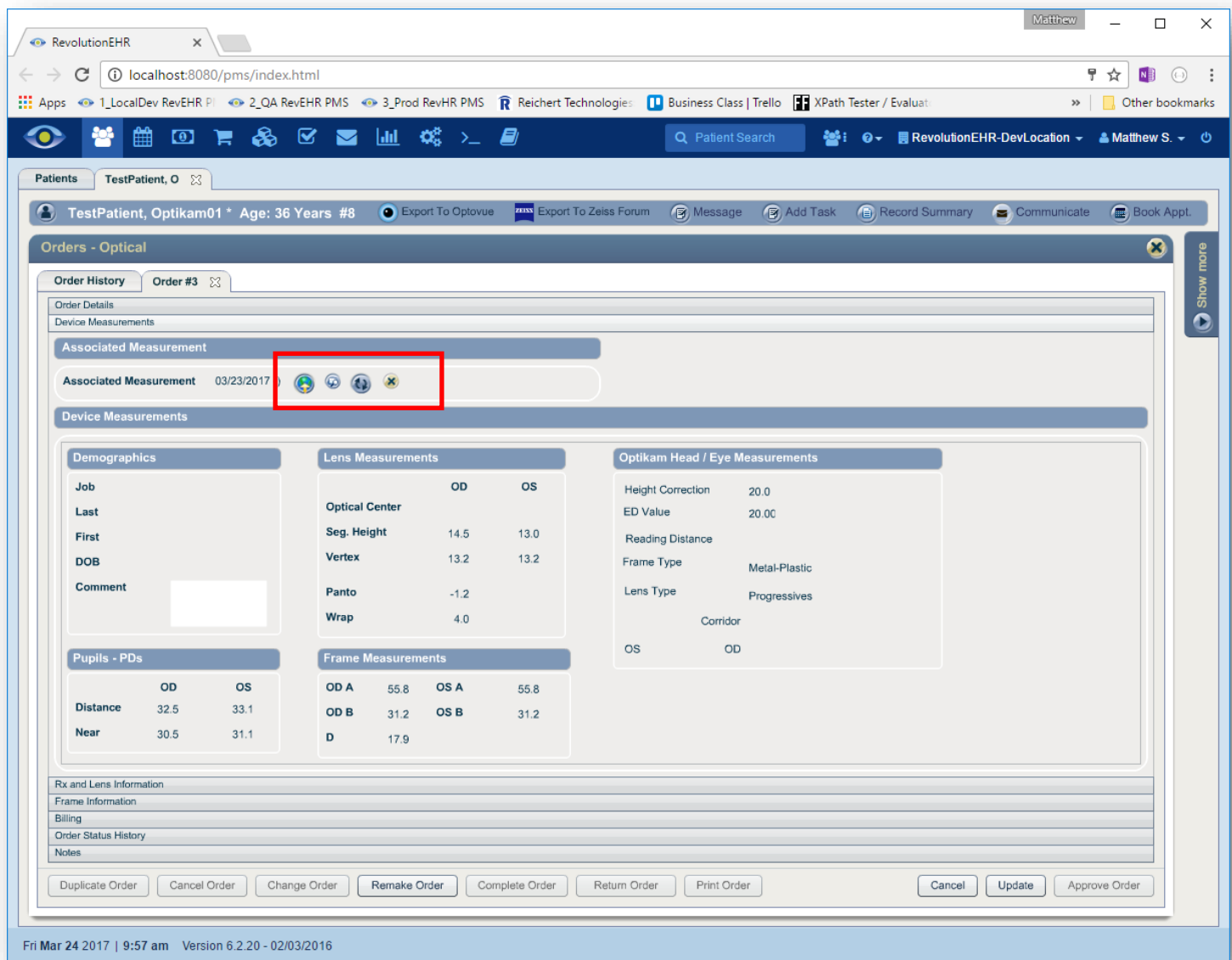
Normal User

Discard Session

Send

Step 5: Apply Measurements to an Order

In RevolutionEHR the captured and uploaded Optikam measurements are automatically applied to the selected order if Existing was the Order Type chosen. It can also be applied to an Order if the Order Type of New was chosen. With the Order in Edit mode, the Associated Measurement section of the screen displays the buttons pictured below.



RevolutionEHR

localhost:8080/pms/index.html

Patients TestPatient, O

TestPatient, Optikam01 * Age: 36 Years #8

Export To Optovue Export To Zeiss Forum Message Add Task Record Summary Communicate Book Appt.

Orders - Optical

Order History Order #3

Order Details

Device Measurements

Associated Measurement

Associated Measurement 03/23/2017

Device Measurements

Demographics

Job

Last

First

DOB

Comment

Pupils - PDs

	OD	OS
Distance	32.5	33.1
Near	30.5	31.1

Lens Measurements

	OD	OS
Optical Center		
Seg. Height	14.5	13.0
Vertex	13.2	13.2
Panto	-1.2	
Wrap	4.0	

Optikam Head / Eye Measurements

Height Correction	20.0
ED Value	20.00
Reading Distance	
Frame Type	Metal-Plastic
Lens Type	Progressives
	Corridor
OS	OD

Frame Measurements

OD A	55.8	OS A	55.8
OD B	31.2	OS B	31.2
D	17.9		

Rx and Lens Information

Frame Information

Billing

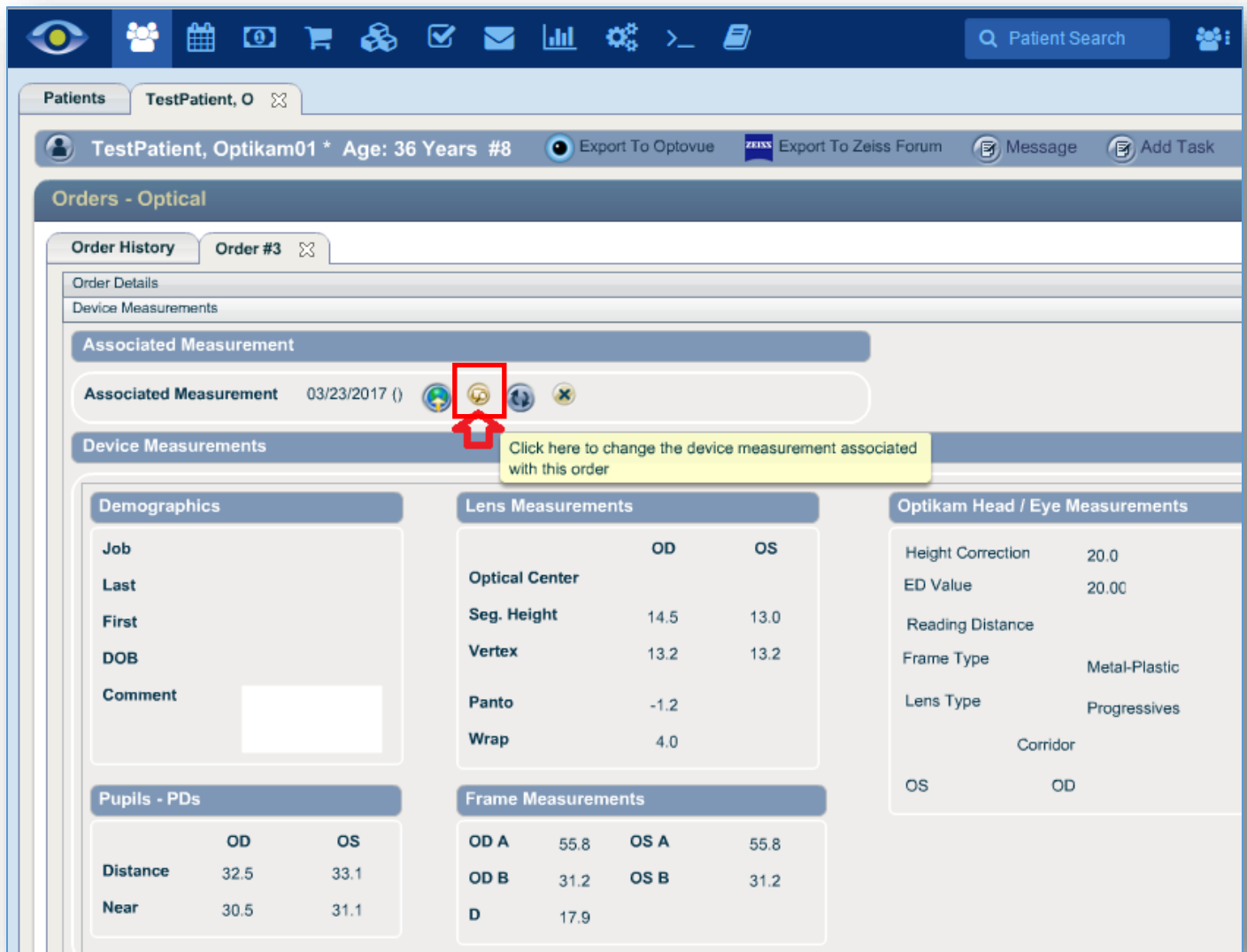
Order Status History

Notes

Duplicate Order Cancel Order Change Order Remake Order Complete Order Return Order Print Order Cancel Update Approve Order

Fri Mar 24 2017 | 9:57 am Version 6.2.20 - 02/03/2016

To select measurements or change which set of measurements are associated with this Order, click the button depicted below:

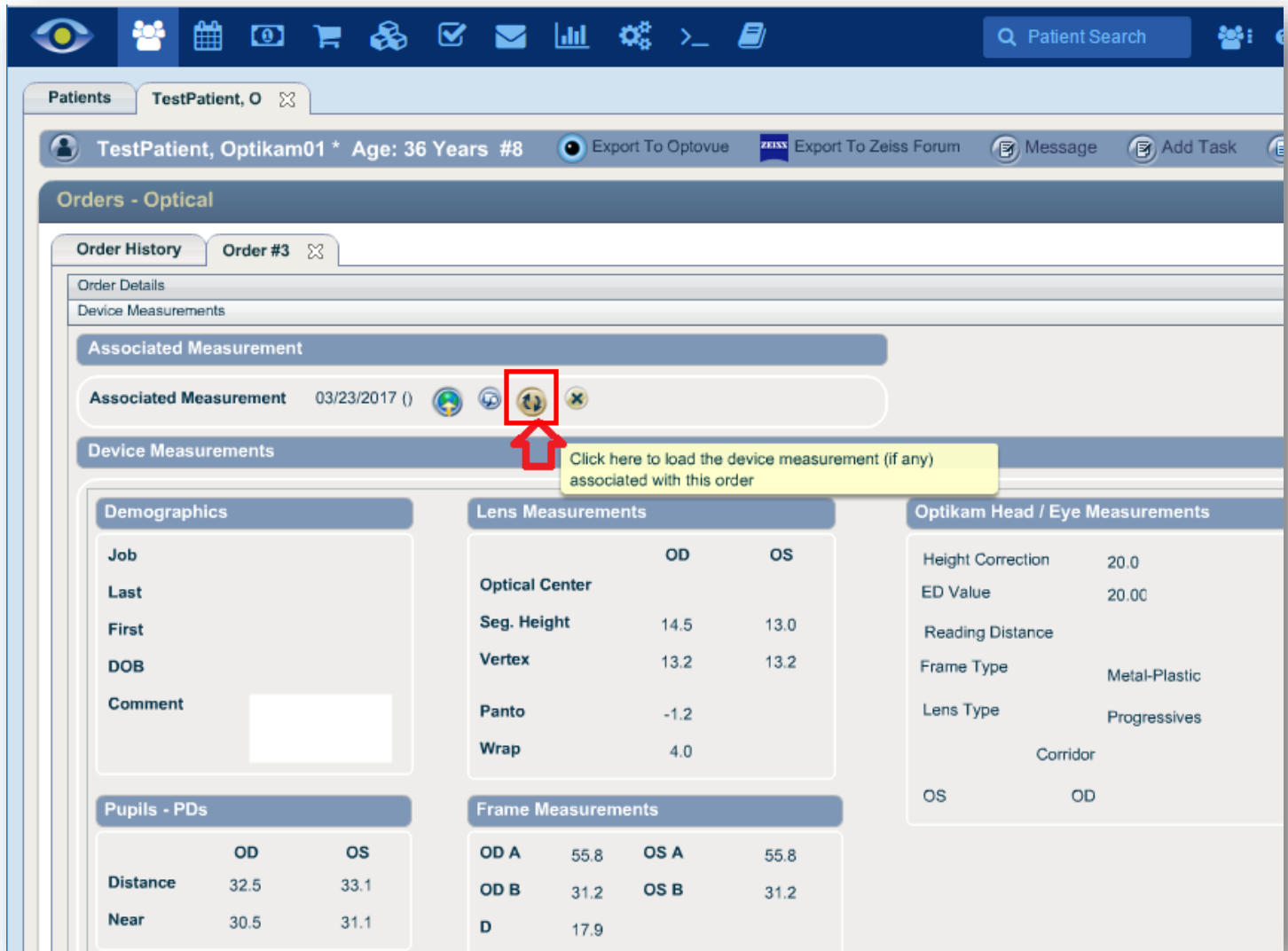


The screenshot shows the 'Orders - Optical' section for 'TestPatient, Optikam01 * Age: 36 Years #8'. The 'Associated Measurement' row shows a date of '03/23/2017 ()' and a button highlighted with a red box. A tooltip points to this button with the text: 'Click here to change the device measurement associated with this order'.

The 'Device Measurements' section contains the following data:

Demographics		Lens Measurements		Optikam Head / Eye Measurements	
Job		Optical Center	OD	OS	
Last		Seg. Height	14.5	13.0	Height Correction
First		Vertex	13.2	13.2	ED Value
DOB		Panto	-1.2		Reading Distance
Comment		Wrap	4.0		Frame Type
					Lens Type
					Corridor
					OS
					OD

If the order measurements were associated to is already open, load the associated measurements onto the current Order by clicking the button depicted below. The measurements will populate the tests: Pupils, Lens Measurements, Frame Measurements and Optikam Head / Eye Measurements.



The screenshot shows the 'TestPatient, Optikam01 * Age: 36 Years #8' patient record. Under the 'Orders - Optical' section, 'Order #3' is selected. The 'Associated Measurement' section shows a measurement from 03/23/2017. A red box highlights a circular arrow icon, and a tooltip points to it with the text: 'Click here to load the device measurement (if any) associated with this order'.

Demographics

Job	
Last	
First	
DOB	
Comment	

Pupils - PDs

	OD	OS
Distance	32.5	33.1
Near	30.5	31.1

Lens Measurements

	OD	OS
Optical Center		
Seg. Height	14.5	13.0
Vertex	13.2	13.2
Panto	-1.2	
Wrap	4.0	

Frame Measurements

	OD A	OS A	OD B	OS B	D
	55.8	55.8	31.2	31.2	17.9

Optikam Head / Eye Measurements

Height Correction	20.0
ED Value	20.00
Reading Distance	
Frame Type	Metal-Plastic
Lens Type	Progressives
Corridor	
OS	OD