The Complete, Cloud-based Practice Management and EHR Solution

Uprise℠
by VisionWeb

CONTENTS

Practice management software doesn't have to be complicated in order to be powerful. And, you shouldn't have to settle for bulky solutions for your eyecare practice. That's what we believe, and that's why we set out to change the face of practice management and EHR. We started with a team of ODs and their staffs, understanding the daily challenges of EHR/PM systems, then we mixed in the latest technological innovations, and a lot of thought about maximizing efficiency. The result is a cloud-based practice management and EHR solution that is like nothing you've seen before.

SmartTouch EHR℠

We designed our EHR so your time could be focused on the patient, and with SmartTouch, just a few taps documents the exam findings, assessment, plan, orders, interpretation & reports, patient education and coding verification. You can customize SmartTouch for a wide variety of exam situations.

Hands-free MIPS℠

Compliance is important, but can get in the way of providing care. We designed our compliance tracking to run in the background. You just check a few boxes and submit your compliance reports.

Faster "Go-Live" and Faster to Master

Because there is no hardware to buy or install, Uprise is more affordable long-term and requires less training than other systems. Throughout the entire implementation process, you will have custom one-on-one support you can count on! Even training your staff is faster than competing platforms.

Certification Information

Uprise Version 1.3 is a Complete EHR

This Complete EHR certification is 2014 Edition compliant and has been certified by an ONC-ACB in accordance with the applicable certification criteria adopted by the Secretary of the U.S. Department of Health and Human Services. This certification does not represent an endorsement by the U.S. Department of Health and Human Services or guarantee the receipt of incentive payments. Drummond Group is accredited by ANSI and approved by ONC for the ONC HIT Certification Program to certify: Complete EHR, EHR Module (all), and Certification of other types of HIT for which the Secretary has adopted certification criteria under Subpart C of 45 CFR.

VisionWeb (Uprise version 1.3)

Certification ID # 04232015-2971-8

Criteria Certified:
170.314(a)(1-15); 170.314(b)(1-5, 7); 170.314(c)(1-3); 170.314(d)(1-8); 170.314(e)(1-3); 170.314(f)(1-3); 170.314(g)(2, 3, 4).

Additional software used:
NewCropRx, Rendia, Secure Exchange Solutions.

Uprise 1.3 does not require any additional one-time or on-going costs in order to attempt to meet meaningful use objectives and measures.

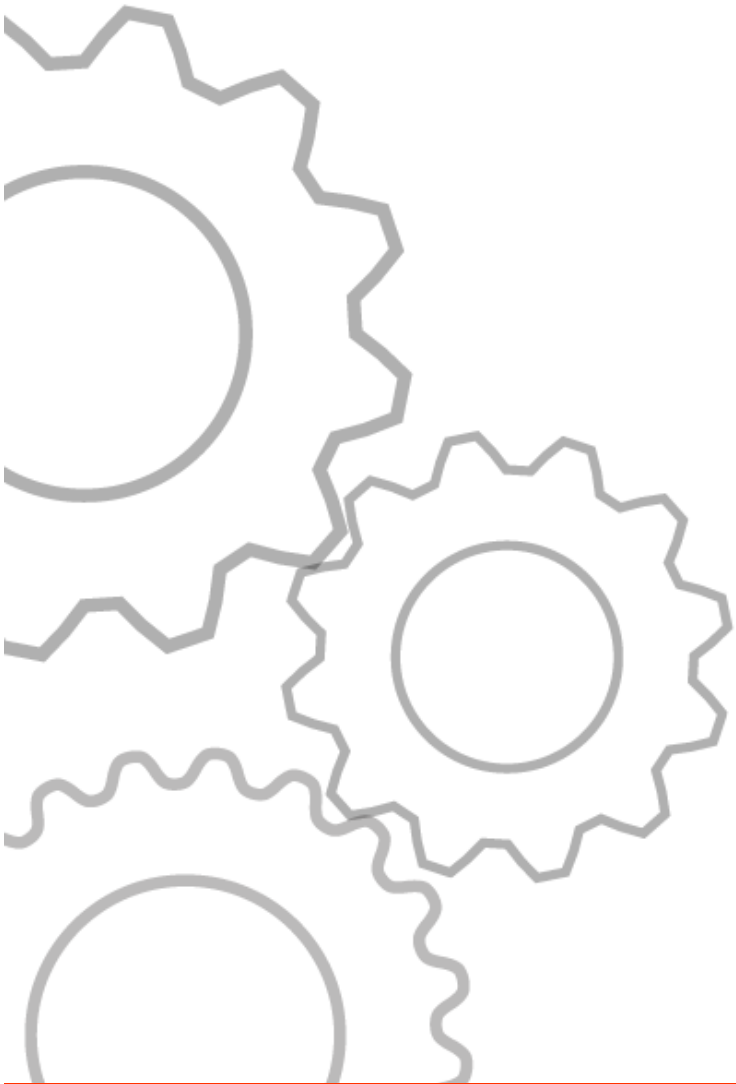2015 Certification is currently underway.

Pricing

Uprise pricing is per OD. You can run Uprise on as many supported devices as you like.

We have discounts if you are a member of certain buying groups. Talk to your sales representative to learn more and receive a customized quote.

Software Features

Included Features

Uprise Feature Set	
Hands-free MIPS	MU Certification (2014)
Patient Portal	Optical Quotes
Patient Demographics Database	Prescriptions
Rx Order Processing	Product Catalog
Invoicing	Rx Order Tracking
Scheduler	Inventory
Scheduling Templates	Clearinghouse*
EHR	Medical Claims
Exam Templates	Vision Claims
Refractions	Eligibility & Authorization
Allergies/Meds	Systems Setup
Results	User Administration
Vitals	List Configuration
Imaging & Notations	Expert Onboarding
Questionnaires	Training Portal
Orders	Training Videos
Problems/Procedures	Help Portal
Documents	Support Ticketing
Immunizations	Ledger
Optical Checkout	Optional Point-of-Sale

* Small additional fee applies

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Patients & Patient Portal

Patients

View a complete, data-rich profile for every patient.

- ✓ **Manage Patient Information.** Use search, create, and edit functionality to easily access and manipulate patient data.

- ✓ **Review Patient Timelines.** View patient history such as appointments, prescriptions, claims, eligibility and authorization, and past transactions to get a complete view of patient interaction.

- ✓ **Stay Organized.** Digital files are archived so you never lose an important document again.

Patient Portal

Communicate securely with your patients.

Through the patient portal, your patients will be able to:

- ✓ Complete required intake questionnaires online before an appointment or in the lobby via tablet.
- ✓ Access medical history and lab results
- ✓ Obtain educational materials and treatment instructions
- ✓ Request appointments for first-time or follow up visits

Scheduler

Scheduler

Organizing your schedule shouldn't be a burden.

- ✓ **Customize Your Calendar.** Specify default appointment duration by appointment type, or based on resource availability by provider, equipment, or room.

- ✓ **Access Calendars Anywhere.** View your calendars from your computer or tablet to stay on top of your schedule even when you're on-the-go.

- ✓ **Schedule Efficiently.** Create a patient directly from within the scheduler and quickly find first available appointments by day or provider.

- ✓ **Multiple View Options.** View appointments by insurance status, doctor, room, equipment, and appointment status.

- ✓ **View Patient Details.** DOB, insurances, eligibility, account balances, and past appointment history are all visible within the scheduler.

- ✓ **Insurance Eligibility within the Calendar.** View state of eligibilities for your patients within the calendar with a quick glance.

EHR

EHR

Beautiful and smart design.

Eliminate paper charts once and for all with electronic records and medical data! Our EHR piece has a beautifully designed interface for easy use and a smart workflow to ensure that each patient visit moves along smoothly.

The Industry's First Cloud-Based EHR with Stage 2 Meaningful Use Certification.

✓ **Complete Certification**
2014 Edition Meaningful Use requirements are stringent and we expect many other vendors will face challenges when trying to achieve complete certification. Some will opt for modular certification, only testing a portion of the required objectives; some will wait to pursue certification after we are well into 2014. We simply didn't think that was good enough. You deserve a solution that can keep up with all of the progressing regulatory requirements you face, so we made complete certification a priority. As a complete Meaningful Use Stage 2 Certified solution, Uprise gives you the ability to attest for both stage 1 and stage 2. So whether you're ready for stage 2, or if you haven't even started attesting, Uprise has you covered.

✓ **Improved Clinical Care Delivery**
Using Uprise means your patients will also experience the full benefits of a Stage 2 certified system, including the ability to view, download, and transmit their health information online; and exchange secure electronic messages with your practice.

Checkout & Products

Checkout

Optical checkout made easy.

- ✓ **Process Quotes Quickly.** Create and view quotes for products and easily access insurance eligibility to help your patient understand their costs.
- ✓ **View, Create, and Edit Invoices.** Invoices are broken down by professional services, prescription orders, and misc. items. Track fee distribution to ensure reimbursements and generate an accurate financial statement.
- ✓ **Follow Up on Open Invoices.** View all pending charges at once to make sure nothing is missed.
- ✓ **Record Payments.** Manage payments made by credit, cash, and check.
- ✓ **Improve Aging Accuracy and Reduce Write-Offs.** Discount and return/exchange adjustments give you the ability to continually improve aging accuracy and reduce write-offs.

Products

Everything you need to manage orders.

- ✓ Use the enhanced VisionWeb ordering connection to place spectacle lens, contact lens, and frame orders to over 400 suppliers to get jobs back 2-3 days faster than with other methods.
- ✓ Rest assured that your orders are correct when the lab receives them with automated error-checking features.
- ✓ Record lens parameters from various lens personalization devices.
- ✓ Save on shipping costs by batch ordering contact lenses.
- ✓ Choose to have contacts shipped to your office or directly to your patient.
- ✓ Track your orders in real-time, without calling the lab for job status.

Claim Filing & Reports

Claim Filing

Electronic claims at your fingertips.

- ✓ **Automated Code Verification.** Zip code specific, covered CPT® and ICD-10 code combinations and CCI Code Bundling verification by CodeSAFEPLUS® is embedded in Uprise to ensure the information you enter is correct before submission.
- ✓ **Submit Claims Electronically.** Connect with an insurance clearinghouse for electronic claims submission and ERA management.
- ✓ **Track Claims Electronically.** View denials, delays, adjustments, and acceptances in real time as provided from the clearinghouse.

Reports

Visual analytics to improve profitability and efficiency.
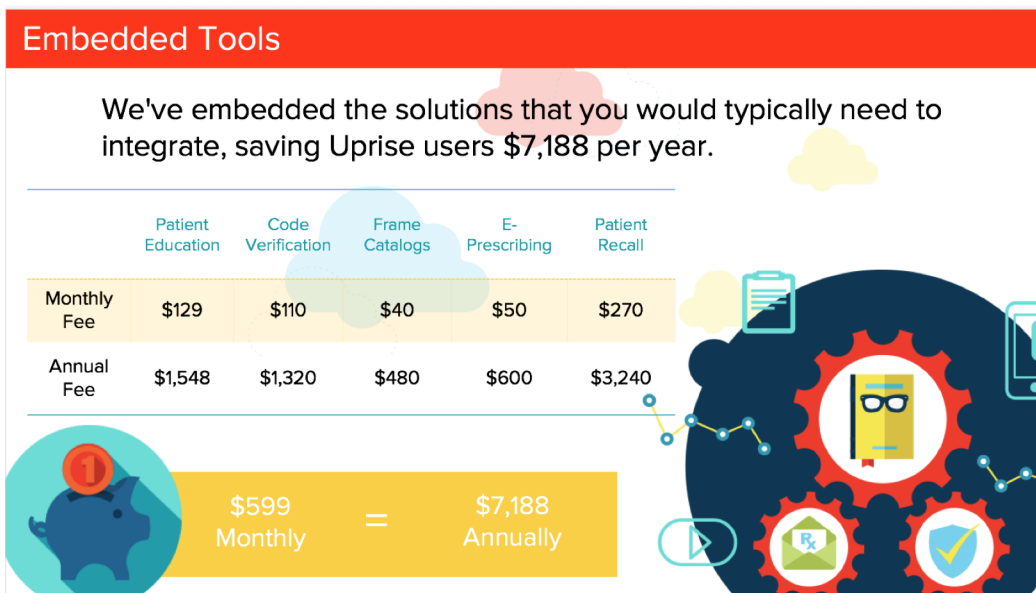
Generate interactive reports to help you better understand your practice. Operational, financial, auditing, and analysis reports help identify issues such as billing errors and unusual billing patterns. They also give you more insight into your patient database by analyzing appointment durations, demographics, and best-selling ophthalmic products.
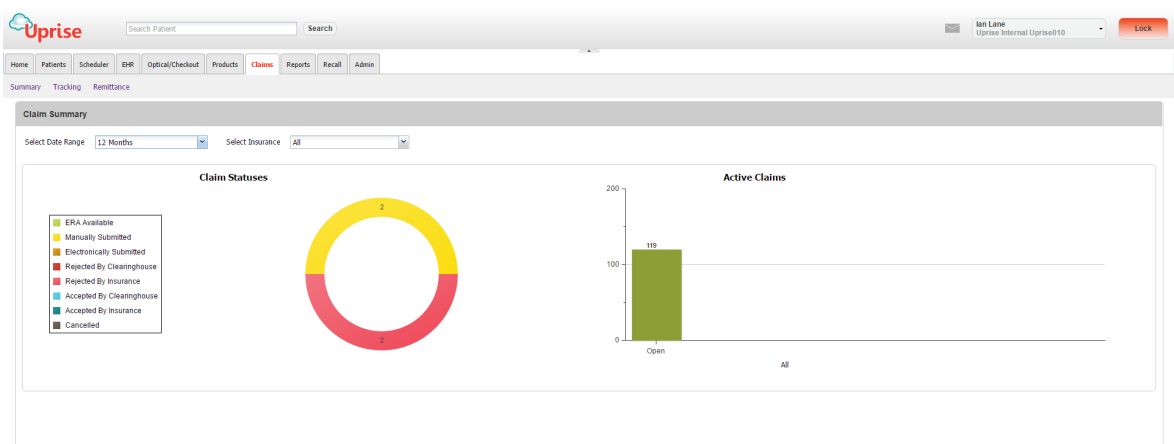
Embedded Tools
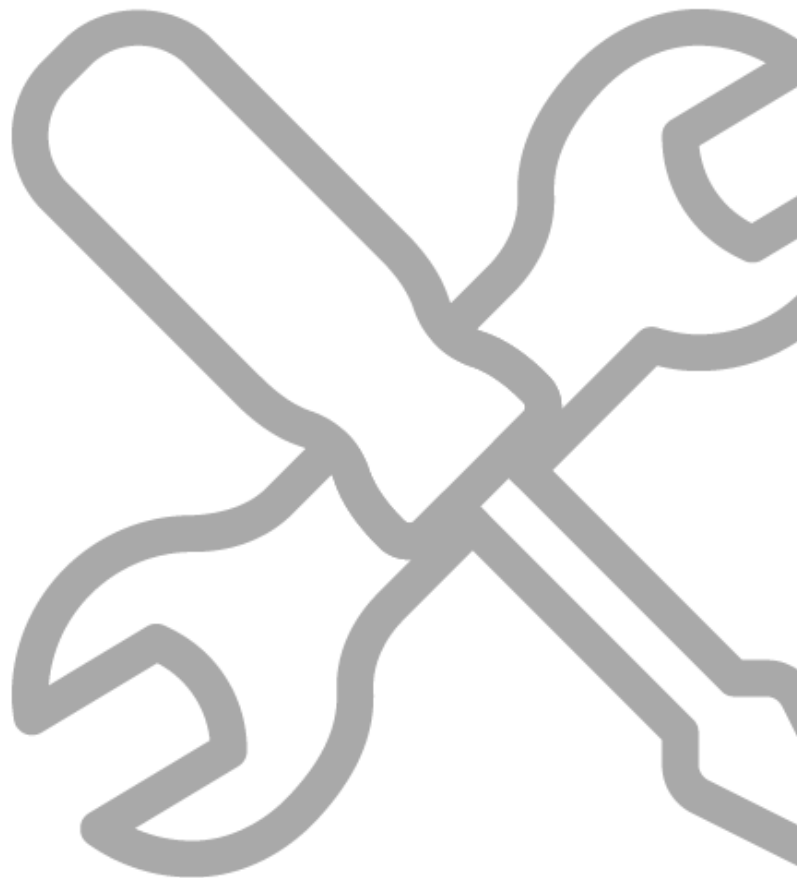
So, what's the difference between integrated and embedded features? Integrating software means dealing with additional fees and working with third party vendors. If CD installations and the risk of incompatibility don't sound like fun, having embedded tools in your system is the way to go!

Embedded Tools

We've embedded the solutions that you would typically need to integrate, saving Uprise users $7,188 per year.

	Patient Education	Code Verification	Frame Catalogs	E-Prescribing	Patient Recall
Monthly Fee	$129	$110	$40	$50	$270
Annual Fee	$1,548	$1,320	$480	$600	$3,240

$599 Monthly = $7,188 Annually

See the next page for detailed descriptions of embedded products.

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Secure Messaging
Communicate internally and externally with HIPAA-compliant messaging.

Frames Catalogs
Import data, such as pricing information, to your catalogs during setup, instead of entering it manually.

Patient Recall
Send automated email and text reminders to your patients, access reminder reports, and customize recalls.

E-Prescribing
Send error-free prescriptions to more than 60,000 pharmacies nationwide electronically.

Patient Education
Give patients access to educational materials about their assessments using Rendia.

Code Verification
Navigate complex insurance and Medicare CPT® rules and regulations, covered CPT-ICD-10 combinations, and incompatible CPT code pair same day of service.

Videos And Testimonials

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EHR Overview

https://uprise.wistia.com/medias/j4vto1q8ae
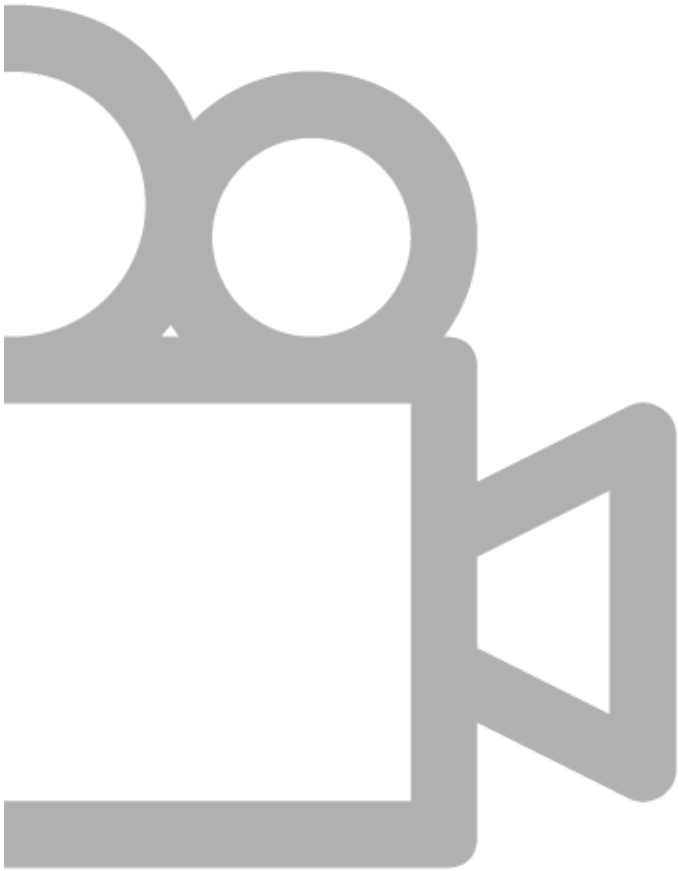
Practice Management Overview

https://uprise.wistia.com/medias/lc743eaxmn

How Dr. Stanley Added $21K a Month in Revenue Using Uprise

Practice Background

Located in Manhattan, Kansas, Eye Care Associates of Manhattan, PA is a single-doctor optometric practice founded in 1958 with 9 staff members. After taking over the practice in 2008, Dr. Matt Stanley 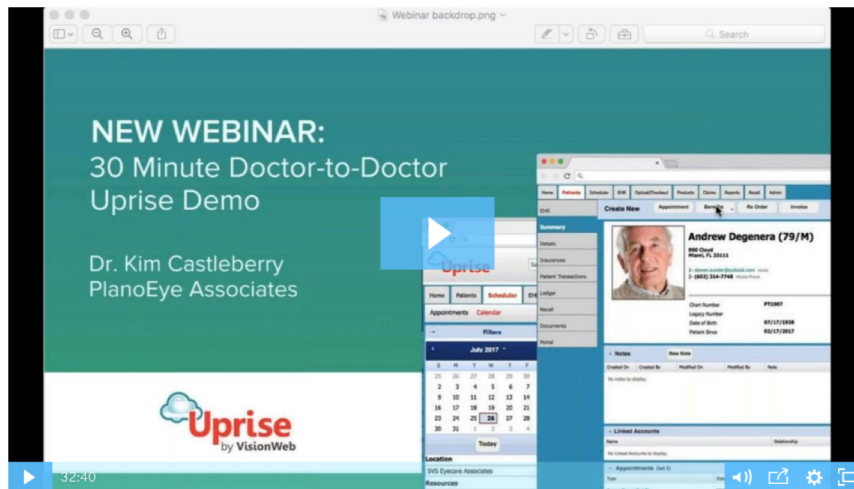concentrated on offering full-scope optometry services using state-of-the-art diagnostic technology in a comfortable environment.

Challenges:

• Completing a comprehensive, audit-proof chart took time away from patients

• Updating the system and accessing the information from home was complex and time consuming

• Training staff to use the existing EHR efficiently

• Managing third-party integrations was too costly

Solutions Used:

• Uprise Practice Management and EHR

Results:

• Added $21k a month in revenue

• Reduced IT expenses

• Enhanced patient communication

Challenges

Focusing on building a modern practice, Dr. Stanley found that his current EHR looked and behaved more like a spreadsheet than a piece of modern technology. The amount of work that was required at the end of the day to complete a comprehensive chart that fulfilled insurance requirements and ensured detailed documentation of each patient's visit took up a large part of his time. At the end of each day, Dr. Stanley would spend an additional 30 minutes backing up the system to take a copy offsite with him.

Additionally, constantly having to move between screens and areas of the software to follow the patient's journey through the practice was cumbersome, and manually maintaining the third party solutions proved costly and error-prone. When there was a new update, Dr. Stanley would have to come in on his day off to install the changes on 14 computers and hope that it wouldn't break any of the integrations.

"There was a time a patient came in asking why we didn't remind him of his appointment. When we logged into the dashboard of the patient recall system we were using; we discovered that the third party program that ran in the background on our server and mined our database had stopped working a few weeks before. The lack of visibility into whether the integrations worked or not was frustrating because we were spending thousands of dollars piecemealing each solution together in-house and were relying on expensive IT help when we couldn't figure it out ourselves," said Dr. Matt Stanley.

For more info call 855-887-7473 or visit startyouruprise.com

Solution

Due to the proximity to a military base and a university, Dr. Stanley experiences a higher level of employee turnover than other optometric practices. He needed a solution that was not only visually appealing and easy-to-use, but also intuitive enough that upon giving new staff their credentials, the solution would guide the employee on what to do.

Additionally, the solution needed to be all-inclusive and eliminate the need to maintain third party integrations. Most importantly, the solution had to be cloud-based, so he could securely access charts at home and relieve him of the burden of managing constant back-ups and regular server maintenance, while spending time with his growing family.

After looking at a few cloud-based EHRs, Dr. Stanley selected Uprise by VisionWeb because of the clean user-interface, ease-of-use, cloud-based technology, and built-in integrations that allow users to do everything they need to do within one browser window.

Results

Since implementing Uprise in early 2016, Dr. Stanley has seen an increase in efficiency of chart documentation, improved employee onboarding and training with the system, and a reduction in IT costs.

"My staff and I can manage and track a patient's journey from check-in through check-out all from one window, cutting down on having to learn multiple tools or memorize different logins. Because Uprise is an all-in-one solution, we don't have to manage different invoices or worry about integrations working correctly. More importantly, we were able to add three more exam slots each day and add significant revenue potential," said Dr. Matt Stanley.

Benefits Dr. Stanley has seen since using Uprise include:

• Improved workflow efficiency resulting in a $21k increase in revenue from the ability to add an additional 3 exams slots per day

• Reduced IT expenses freeing up resources to build-up staff

• Enhanced communication with patients through embedded patient portal, patient education, patient recall, and other cloud-based solutions

> *"The Uprise Customer Support and Implementation Teams have always been accessible, responsive, and open throughout the entire process. I didn't expect to feel and enjoy such a wonderful family-like vibe that I get from working with the people at VisionWeb. With my old system whenever I called tech support I was talking to a new person every time, and felt more like a number than a valued customer."*
>
> *- Dr. Matt Stanley*
> *Eye Care Associates of Manhattan, PA*

Frequently Asked Questions

General

Q: Does VisionWeb offer any other cloud-based solutions?

Yes. Our ordering and insurance solutions are cloud-based and have been since 2001.

Q: What's the difference between a client-server solution and a cloud-based solution?

Client-server solutions require you to install and maintain servers where the software will be installed for your use. That means you have to purchase the server hardware, and ensure that you have the infrastructure in place to maintain them. Cloud-based solutions are available via an Internet browser where you simply log in to use the solution. With a cloud-based solution, you don't have to purchase or support servers in your office, and you have the freedom to choose which devices you want to use!

Q: What's the difference between a cloud-hosted and a cloud-based solution?

Cloud-hosted solutions are basically client-server solutions hosted in a cloud. You still have the cost, security, and backup requirements just as you would if the server were in your office. A true cloud solution, like Uprise, requires only a browser and internet connection. We take care of security, server maintenance, and backups.

Q: Is support based in the US?

Yes, our technical and product support is US-based. Even better, they sit in the same office in close proximity to developers, trainers, and other personnel so they can obtain answers quickly.

Features

Q: How long do updates take?

Updates are seamless since Uprise is a cloud-based product. Updates to the software are performed outside of normal business hours, so you access the latest version every time you log in. We take care of all the updates so you don't have to worry about them. We generally have a major release every month or two.

Q: Is there an additional charge for software updates?

No. Other vendors may charge for software updates that require lengthy installations and time away from your patients, but we don't. Being a cloud-based software, updates are made automatically for users, so you don't have to worry about anything. It is easy for us to adapt to all upcoming changes in reporting, coding, and governmental requirements.

Q: Can I customize the exam to look like my paper charts?

The exam record is designed to have the look and feel of a paper record, and it's based on the doctors' workflow - starting from the chief complaint through to the assessment and plan based on Medical Documentation Guidelines. You can customize what you do and don't see on the exam record, either during the Exam Type setup, or even on the fly in the middle of the encounter with the patient. The patient dashboard can also be customized by adding and moving available portlets.

Q: Is there a charge for multiple locations?

No. Our pricing is per month / per OD. You can run Uprise for as many support staff (non-ODs) as you like on any supported devices.

Features

Q: Can I change the Exam Type without starting over?

Yes. You may change the exam type at any point during the exam and all relevant data is retained.

Q: Does the software offer the capability to see historic data?

Yes. Uprise offers multiple methods of viewing historical patient data.

Q: How can I provide Continuity of Care Documents (CCDs) to other practices using Uprise?

You would send the CCD directly from the patient's exam under the Orders section. (NOTE: To send a CCD to another provider, you and the provider you are sending the CCD to must have a Direct Address, which is an e-mail address registered with a Health Information Systems Program (HISP); it allows a health care provider to securely send health information to another provider.)

Q: How can I provide Continuity of Care Documents (CCDs) to my patients using Uprise?

Once the CCD is generated, the patient will be able to access their CCD via their own secure Patient Portal account. They can then print the file, upload it to a USB, or download a PDF or XML of the file and send to another provider if they need to.

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Features

Q: Can a receiving 2014 certified practice management system import data into their fields from a CCD that is sent over from Uprise?

Yes. If the receiving practice management system is a complete certified system or at least has been certified for transitions of care 170.314(b)(1). We are in the process of 2015 certification at present.

Q: Does Uprise come with suggested follow-up letters for referrals that I can customize?

The system does come with follow-up letters, and yes, you can customize them.

Q: I want to access frames catalogs; will I need a separate log-in from Uprise to do this?

No. Frames Data is embedded in Uprise, so you don't need a separate account, or to log into Frames Data directly, to access this information. You'll have access to more than 40,000 frame listings from 160 manufacturers that are included in the Frames Data catalog, including frame information and up-to-date wholesale pricing. You will also be able to set retail pricing based on wholesale rates. Our team will help you with all of this during the implementation process.

Q: How do I make sure my practice forms are accessible on the Patient Portal?

Our team will help you with this during your implementation process. All you need to do is provide us with the forms in PDF format. We also have patient intake forms that can be used on an iPad in your office.

Features

Q: How do I send educational materials to a patient?

Diagnosis codes in Uprise are already mapped to educational materials (videos and documents) from Rendia. Because of this, the system will recommend material for your patients, based upon your selections during exam annotation. You can then share this information via the Patient Portal, or by emailing it to your patient directly.

Q: Will I have to hand-enter all ophthalmic lenses?

No. Uprise by VisionWeb comes with the ophthalmic lenses, contact lenses, and frames data from the VisionWeb catalogs, so there is no need to hand-enter all SKUs. That doesn't mean that there is a generic or universal catalog, but it does mean that during set up you simply download the information for the brands and products you sell, and they are in your system. You don't have to enter them manually during set up or when working with products in the system.

Features

Q: Is E-Prescribing included?

Yes. We have a sophisticated, seamless integration for E-Prescribing.

Q: If I already have a solution for E-Prescribing, can I continue to use it with Uprise, or do I have to use yours?

If you want a fully integrated solution, you will want to use ours. However, you won't lose any of the data from your existed E-Prescribing providers.

Q: Can I submit claims directly through a clearinghouse?

Yes! Uprise is directly connected for easy claim submission through a clearinghouse. Change Healthcare (formerly Emdeon) is our preferred clearinghouse for Uprise.

Q: What payers are available for claims management through Uprise?

Uprise is connected with over 2,000 commercial and government medical payers, and a handful of vision payers. However, like with all clearinghouses, you can only file the professional claim (also referred to as the exam) with vision payers through our solution. A list of payers will be provided upon request.

Features

Q: I currently have to call insurance payers to get patient eligibility and authorizations; is this the same with Uprise?

No. An added benefit of using VisionWeb's insurance solution in Uprise is that you will have the ability to retrieve this information electronically, provided that the insurance payers offers this information electronically.

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Q: When I receive a paper Explanation of Benefits (EOB), I must post by line item. Is this true with Uprise?

It depends. Uprise utilizes electronic remittance advice (ERA) for auto-posting of remittance information. However, if your payer doesn't provide an ERA, you will have to post information from the EOB manually, as with any other system.

Q: Is Uprise prepared for upcoming government regulations such as coding and claim form changes?

Yes. Uprise is built on ICD-10 codes with the option to view and use ICD-10 codes before the switch. And we now support both the current CMS 1500 form (CMS 1500 08/05) and the new updated 1500 claim form (CMS 1500 02/12).

Q: Is claims management through a clearinghouse included in my monthly Uprise fees?

No. There is an additional fee for this service, however it is based on your claim filing needs and is affordable for any practice.

Features

Q: How is pricing set for the claims management
solution?

Pricing is tier-based and varies based upon a set number of
transactions for you to use each month. It is also per location, not per
provider.
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Q: How do the tiers work?

You get a certain number of transactions for a set price. A
transaction is an eligibility and authorization check, a claim status
check, a claim submission, and an electronic remittance advice
(ERA).

Q: Are there any enrollment fees associated with claims
management?

No. There are no additional enrollment fees for our claims
management solution.

Q: What if I already have a clearinghouse, can I keep
using it with Uprise?

It depends on which clearinghouse solution you are using. Speak
to an Uprise sales representative for detailed information about
clearinghouse compatibility.

Features

Q: Does Uprise manage insurance claims?

Yes. The insurance plans are populated and maintained within the Uprise system using VisionWeb services. We are working on an industry-first way to handle insurance plans by maintaining the plan details in the cloud with constant updates, so you don't have to.
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Q: Do you support equipment integration?

Uprise can connect with any instrument that has a data output mechanism. We are currently working on specific diagnostic and refractive equipment integration with Essilor, Marco, and Nidek.

Q: What type of scanners do you support?

Document scanners are non-hardware specific as Uprise recognizes .pdf format so you have the freedom to use either PC or Mac scanners.

Meaningful Use

Q: Is Uprise HIPAA compliant?

Yes. The system meets all privacy and security requirements. Additionally, all VisionWeb employees are required to undergo HIPAA training.

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Q: Is Uprise certified for Meaningful Use?

Uprise has met all requirements for 2014 certification, meaning that it can be used for attestation for both Stages 1 and 2. Users that have already attested for Stage 1 will be able to pick up with Stage 2. If you haven't attested for Stage 1, you can start with Stage 1 attestation in 2014 and go from there.

System Requirements

Q: What hardware will I need to buy to be compatible with Uprise?

It's totally up to you! All you need is the ability to access an internet browser. Since Uprise is cloud-based, there is no hardware to buy or support. You can choose to use PC, Mac, or even a tablet.

Q: What are the software requirements?

Uprise can run on any that supports a Google Chrome web browser. For a list of recommended systems, please see https://www.startyouruprise.com/requirements

Q: What are the internet speed requirements to run Uprise?

Broadband internet is necessary. We recommend an Internet download speed of at least 12 megabits (Mbps) per second, but you will need a minimum of 8 megabits (Mbps) per second per user.

When contacting your internet provider, please confirm that they are giving you internet speeds in terms of megabits per second, not bytes. (NOTE: You can test your internet speed yourself for free at http://www.speedtest.net/.)

Q: What is the difference between Mbps, MBps, and KBps?

Mbps refers to megabits per second. MBps refers to megabytes per second. KBps refers to kilobytes per second. Example: 12 Mbps is equal to 1.5MBps or 1500 KBps. 8 Mbps is equal to 1MBps or 1000 KBps.

System Requirements

Q: What if the Internet goes down in my office?

We recommend backing up your network with an inexpensive router and 4G cellular connection. It's a small but critical investment to ensure your practice stays online even if the Internet goes down.

Q: What if the Internet is slow in my area?

Uprise is a cloud-based application, and as long as your internet speed meets the minimum internet speed requirements, you will be able to use it. Refer to the Internet requirements above. Or, you could use 4G as an alternative.

Q: Do I need to back up my data or hire a service for backup?

No. We take care of that for you.

Q: Do I need an IT person on hand?

No. Uprise runs in a browser, so as long as you can launch Chrome, you're good to go. Any support you need is just an email away. Our support staff is in the US.

Data Management, Security, & Reliability

Q: Is Uprise available 24 hours a day?

Yes. The software is available to all eye care practices in all US territories 24 hours a day, 7 days a week. In the case of maintenance, performance may be slightly degraded between 0:00AM CST and 5:00AM CST. Advance notice of maintenance will be given.

Q: Can different levels of access be granted to employees?

Yes. Uprise provides administration the ability to control user access to different levels of information. For example, your practice may decide not to allow certain staff to have access to billing.

Q: Does Uprise own my data?

Uprise only hosts your practice data, your data is yours.

Q: Can the hosting provider access/use/keep my data?

The data that is stored with the hosting provider is encrypted and is not in a readable/usable format.

Q: Can I move my data from my previous PM or EHR system to Uprise?

Yes. We have a solution to help you with converting the core data for your practice. It varies by system and office set up, and can vary if you want to convert more advanced data. We should schedule a one-on-one demo to get the details of your needs, so that our conversion specialists can give you the most accurate picture of what data conversion would entail for your practice.

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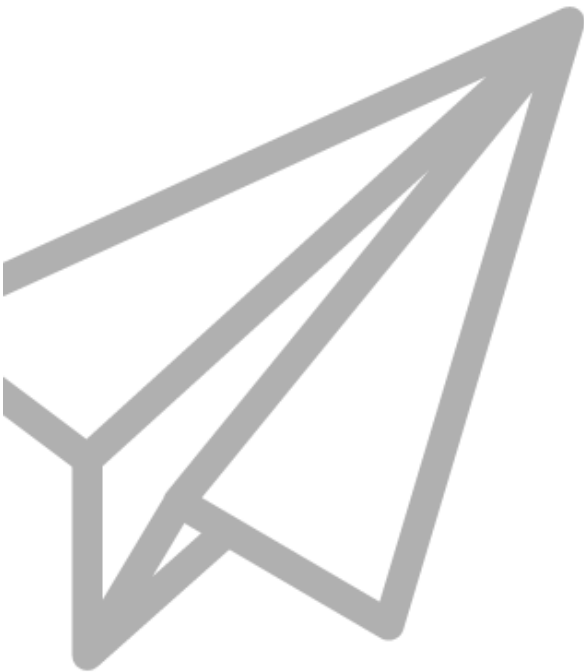
Onboarding

Finally, here's a quick look into our onboarding process of Uprise so you know what to expect if you decide to move forward with us!

1 You will receive an electronic proposal you can accept with the click of a button.

2 You will receive an invoice to pay for your implementation fees.

3 Get introduced to your personal Customer Success Manager who will walk you through your Uprise account, implementation process, and eLearning.

Customer Success Manager Initial Contact Will Include:

- ✓ Scheduling A Formal Project Discovery Call
- ✓ Discussing Implementation Needs During Discovery Call
- ✓ Selecting An Uprise Champion For Your Office To Lead Change Management
- ✓ Creating A Custom Training Plan For Your Practice Needs
- ✓ Setting Expectation For Go-Live

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