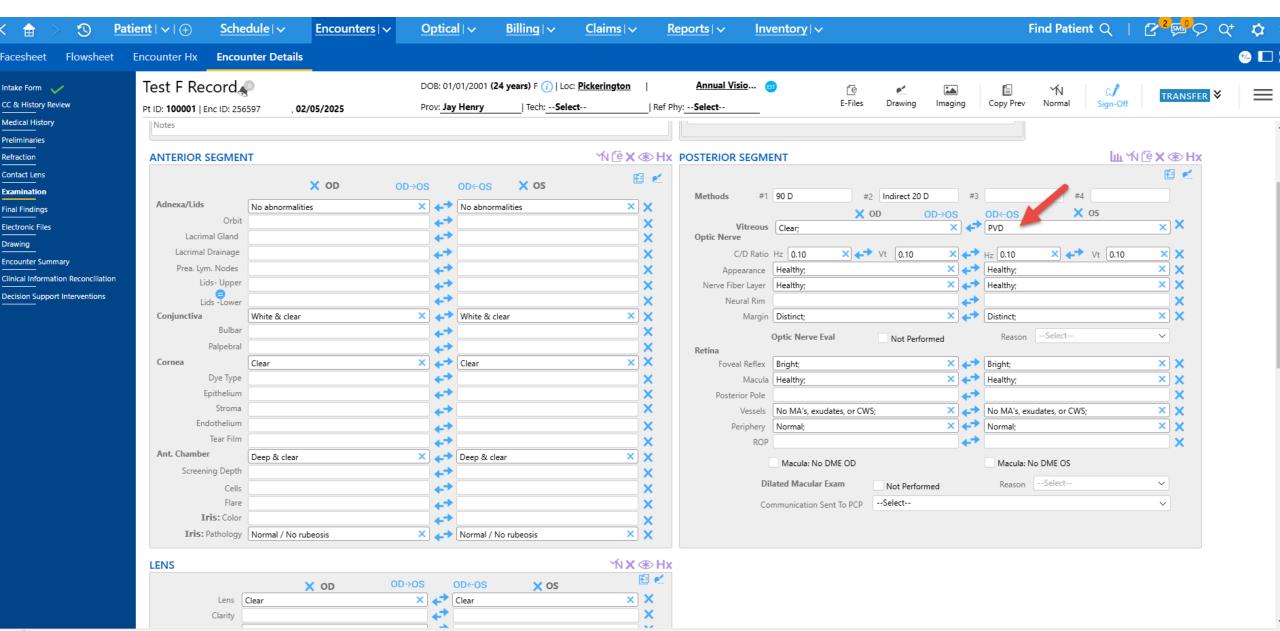# Game Plan

- Open discussion of how advanced EHR and Artificial Intelligence (AI) technologies are transforming optometry
  - Ability to analyze patient data in real time
  - Reducing wait times / convenience for patients
  - Improving patient outcomes
  - Empowering staff to make quicker and more accurate decisions
- Adding efficiencies which improve patient care, patient experiences and profitability
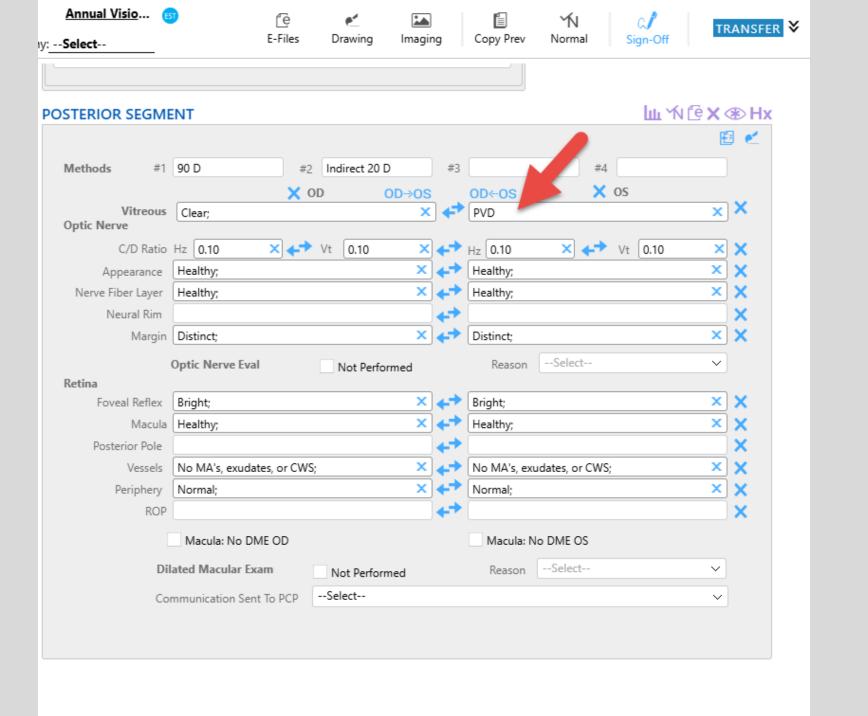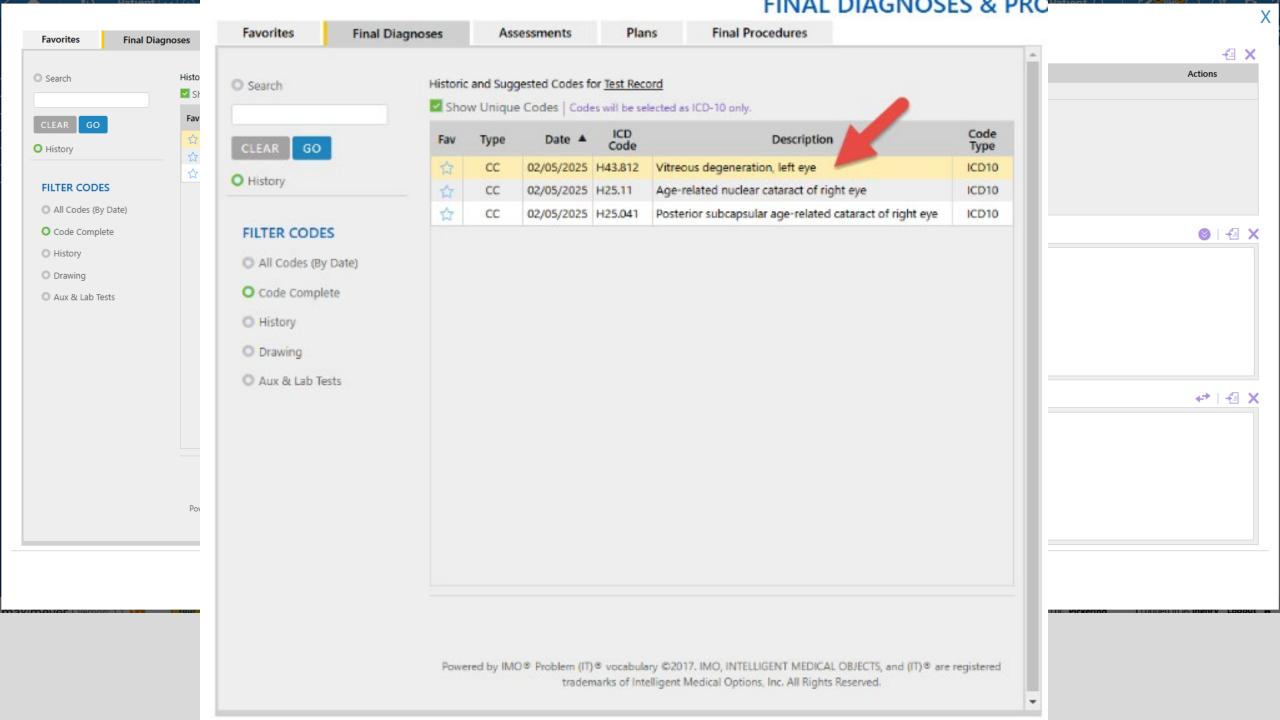
Automated Coding
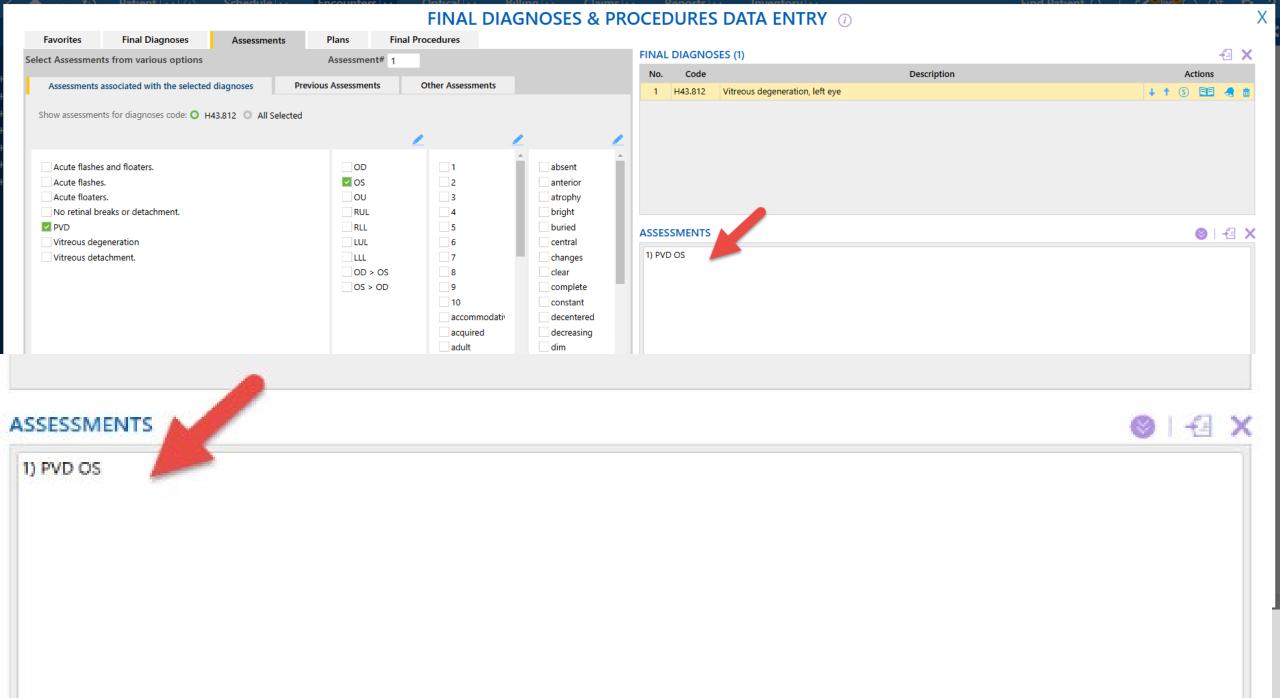
MaximEyes®

Automated Coding

- Completely customizable
  - Trigger ICD-10 code suggestions by key words used in the encounter
- Saves significant time at the end of an encounter
  - A few clicks vs typing everything out
- Link custom assessments and plans
  - Customizable by provider
- Link patient education documents

MaximEyes®

Automated Coding Example

E-Files Drawing Imaging Copy Prev Normal Sign-Off **TRANSFER**

y: --Select--

POSTERIOR SEGMENT

Methods	#1	90 D	#2	Indirect 20 D	#3		#4	

	X OD	OD→OS	OD←OS	X OS

Vitreous	Clear;	X	⬌	PVD	X	X

Optic Nerve

C/D Ratio	Hz	0.10	X	⬌	Vt	0.10	X	Hz	0.10	X	⬌	Vt	0.10	X	X

Appearance	Healthy;	X	⬌	Healthy;	X	X

Nerve Fiber Layer	Healthy;	X	⬌	Healthy;	X	X

Neural Rim		⬌		X

Margin	Distinct;	X	⬌	Distinct;	X	X

Optic Nerve Eval	☐ Not Performed	Reason	--Select--

Retina

Foveal Reflex	Bright;	X	⬌	Bright;	X	X

Macula	Healthy;	X	⬌	Healthy;	X	X

Posterior Pole		⬌		X

Vessels	No MA's, exudates, or CWS;	X	⬌	No MA's, exudates, or CWS;	X	X

Periphery	Normal;	X	⬌	Normal;	X	X

ROP		⬌		X

☐ Macula: No DME OD   ☐ Macula: No DME OS

Dilated Macular Exam	☐ Not Performed	Reason	--Select--

Communication Sent To PCP	--Select--

X

Favorites	Final Diagnoses

○ Search

[ ]

| CLEAR | GO |

○ History

FILTER CODES

○ All Codes (By Date)

● Code Complete

○ History

○ Drawing

○ Aux & Lab Tests

Favorites	Final Diagnoses	Assessments	Plans	Final Procedures

○ Search

[ ]

| CLEAR | GO |

○ History

FILTER CODES

○ All Codes (By Date)

● Code Complete

○ History

○ Drawing

○ Aux & Lab Tests

Historic and Suggested Codes for Test Record

☑ Show Unique Codes | Codes will be selected as ICD-10 only.

Fav	Type	Date ▲	ICD Code	Description	Code Type
☆	CC	02/05/2025	H43.812	Vitreous degeneration, left eye	ICD10
☆	CC	02/05/2025	H25.11	Age-related nuclear cataract of right eye	ICD10
☆	CC	02/05/2025	H25.041	Posterior subcapsular age-related cataract of right eye	ICD10

Actions

Powered by IMO® Problem (IT)® vocabulary ©2017. IMO, INTELLIGENT MEDICAL OBJECTS, and (IT)® are registered trademarks of Intelligent Medical Options, Inc. All Rights Reserved.

X

Favorites	Final Diagnoses	Assessments	Plans	Final Procedures

Select Assessments from various options   Assessment# 1

Assessments associated with the selected diagnoses	Previous Assessments	Other Assessments

Show assessments for diagnoses code: ◉ H43.812   ○ All Selected

FINAL DIAGNOSES (1)

No.	Code	Description	Actions
1	H43.812	Vitreous degeneration, left eye	↓ ↑ ⑤ 📖 🔔 🗑

✏️   ✏️   ✏️   ✏️

- ☐ Acute flashes and floaters.
- ☐ Acute flashes.
- ☐ Acute floaters.
- ☐ No retinal breaks or detachment.
- ☑ PVD
- ☐ Vitreous degeneration
- ☐ Vitreous detachment.

☐ OD	☐ 1	☐ absent
☑ OS	☐ 2	☐ anterior
☐ OU	☐ 3	☐ atrophy
☐ RUL	☐ 4	☐ bright
☐ RLL	☐ 5	☐ buried
☐ LUL	☐ 6	☐ central
☐ LLL	☐ 7	☐ changes
☐ OD > OS	☐ 8	☐ clear
☐ OS > OD	☐ 9	☐ complete
	☐ 10	☐ constant
	☐ accommodati	☐ decentered
	☐ acquired	☐ decreasing
	☐ adult	☐ dim

ASSESSMENTS

1) PVD OS

ASSESSMENTS

1) PVD OS

Favorites	Final Diagnoses	Assessments	Plans	Final Procedures

Select Plans from various options   Plan # 1

Plans associated with selected diagnoses	Previous Plans	Other Plans	CL Evals	Medications	Health Concern

Show plans for diagnoses code: ● H43.812   ○ All Selected

Show other plans for: ○ Recall in   ○ Schedule   ○ Refer to

☐ Discussed diagnosis and natural history.
☐ Return for dilated examination: .
☑ Patient educated - Reviewed symptoms of retinal tears and detachment,
     RTC STAT any increase in flashes, floaters, or loss of vision

☐ OD	☐ 1	☐ absent
☐ OS	☐ 2	☐ anterior
☐ OU	☐ 3	☐ atrophy
☐ RUL	☐ 4	☐ bright
☐ RLL	☐ 5	☐ buried
☐ LUL	☐ 6	☐ central
☐ LLL	☐ 7	☐ changes
☐ OD > OS	☐ 8	☐ clear
☐ OS > OD	☐ 9	☐ complete
	☐ 10	☐ constant
	☐ 20	☐ decentered

FINAL DIAGNOSES (1)

No.	Code	Description	Actions
1	H43.812	Vitreous degeneration, left eye	↓ ↑ Ⓢ 📖 💬 🗑

ASSESSMENTS

1) PVD OS

PLANS

1) Patient educated - Reviewed symptoms of retinal tears and detachment, RTC STAT any increase in flashes, floaters, or loss of vision

Patient | ⌄ ⊕   Schedule | ⌄   **Encounters | ⌄**   Optical | ⌄   Billing | ⌄   Claims | ⌄   Reports | ⌄   Inventory | ⌄   Find Patient 🔍

Test F Record 🔔
Pt ID: **100001** | Enc ID: 256597   , 02/05/2025

DOB: 01/01/2001 **(24 years)** F ⓘ | Loc: **Pickerington** |
Prov: **Jay Henry** | Tech: --**Select**-- | Ref Phy: --**Select**--

Annual Visio... EST

E-Files   Drawing   Imaging   Copy Prev   Normal   Sign-Off   **TRANSFER** ⌄

Left navigation
Intake Form ✓
CC & History Review
Medical History
Preliminaries
Refraction
Contact Lens
Examination
Final Findings
Electronic Files
Drawing
Encounter Summary
Clinical Information Reconciliation
Decision Support Interventions

FINAL DIAGNOSES   Hx

☐ Exclude from IP   ☑ Baseline Exam   ☑ Annual exam

Search Existing Final Diagnoses

No.	Code	Description	Coding System	Actions	☐
1	H43.812	Vitreous degeneration, left eye	ICD10		☐

Assess...
1) PVD

FINAL OUTBOUND DOCUMENTS

Search

				Status	☐
				t Sent	☐

FINAL OUTBOUND DOCUMENTS

Search

Document	Recipients	Needs Review?	Reviewed?	Status	☐
Facts About Floaters	Test Rec... ⌄	No		Not Sent	☐

Customized Workflows

MaximEyes®

Customized Workflows

- Endless options for encounter forms and types
- Can customize per provider to optimize efficiency
- Arrange elements to help with tech and doctor workflow
- Can customize on the fly
- Set custom normal values
- Set data to copy forward (such as past meds, surgeries, etc.)
- Can edit exam elements

MaximEyes®

Customized Workflows

Facesheet   Flowsheet   Encounter Hx   **Encounter Details**

Intake Form ✓			
Medical History			
CC & History Review			
Refraction and Preliminaries			
Examination			
Auxiliary Testing			
Surgery			
Final Findings			
Electronic Files			
Drawing			
Encounter Summary			
Clinical Information Reconciliation (0)			
Clinical Decision Support (1)			

Minnie Mouse 🔔

Pt ID: **54289881** | Enc ID: 50845

DOB: 01/01/1974 **(51 years)** U ⓘ | Loc: **Beaverton** |

Prov: **Jack Jay** | Tech: _____ | Ref Phy: _____

, 02/06/2025

Post Op - Ca... NW

📄 E-Files   ✏️ Drawing   🖼️ Imaging   📋 Copy Prev   🚫 Normal   ✏️ Sign-Off   **TRANSFER**

ANTERIOR SEGMENT

	X OD	OD→OS	OD←OS	X OS	
Adnexa/Lids		↔		X
Orbit		↔		X
Lacrimal Gland		↔		X
Lacrimal Drainage		↔		X
Prea. Lym. Nodes		↔		X
Lids- Upper		↔		X
Lids -Lower		↔		X
Conjunctiva		↔		X
Bulbar		↔		X
Palpebral		↔		X
Cornea		↔		X
Dye Type		↔		X
Epithelium		↔		X
Stroma		↔		X
Endothelium		↔		X
Tear Film		↔		X
Ant. Chamber		↔		X
Screening Depth		↔		X
Cells		↔		X
Flare		↔		X
Iris: Color		↔		X
Iris: Pathology		↔		X
COMMENTS				X

LENS

	X OD	OD→OS	OD←OS	X OS	
Lens		↔		X
Clarity		↔		X

TONOMETRY

Topical Anesthetic Used _____

➕ 🗑️ ⚙️

#	Method	Initials	Time	OD	OS	Actions	#
		No data to display					

Notes: _____

CORNEAL HYSTERESIS   X Hx

	Method	CH	ccIOP		Updated
OD				mmHg	mm/dd/yyyy 📅 --:--:-- -- 🕐
OS				mmHg	mm/dd/yyyy 📅 --:--:-- -- 🕐

Notes: _____

IOP MANAGEMENT   lılı ⌄N X Hx

Glaucoma Flowsheet 📄 ⓘ

	Goal	Updated	Glaucoma Stage
OD		mm/dd/yyyy 📅	
OS		mm/dd/yyyy 📅	

POSTERIOR SEGMENT   lılı ⌄N 📄 X 👁 Hx

Methods	#1	#2	#3	#4

	X OD	OD→OS	OD←OS	X OS	
Vitreous		↔		X
Optic Nerve				
C/D Ratio Hz		↔ Vt	Hz	↔ Vt	X
Appearance		↔		X
Nerve Fiber Layer		↔		X
Neural Rim		↔		X
Margin		↔		X

Optic Nerve Eval   ☐ Not Performed   Reason --Select-- ⌄

Retina

Customized Workflows

Facesheet | Flowsheet | Encounter Hx | **Encounter Details**

Intake Form ✓
+ CC & History Review
+ Medical History
+ Preliminaries
+ Refraction
+ Contact Lens
+ Examination
+ Final Findings
Electronic Files
Drawing
Encounter Summary
Clinical Information Reconciliation (0)
Decision Support Interventions (1)

Test F Record 📷 0
Pt ID: **100001** | Enc ID: 256597   , 02/05/2025

DOB: 01/01/2001 **(24 years)** F ⓘ | Loc: **Pickerington** |
Prov: **Jay Henry** | Tech: --**Select**-- | Ref Phy: --**Select**--

Annual Visio... EST

E-Files | Drawing | Imaging | Copy Prev | Normal | Sign-Off | **TRANSFER** ⌄

TONOMETRY

Topical Anesthetic Used [   ]

#	Method	Initials	Time	OD	OS	Actions	#
			No data to display				

Notes [   ]

DILATION #1

#1 - OU

Dilation Drops
Tropicamide 1.0% [   ]   09:16:00 PM 🕐
[   ]
Dilated?
[   ]   ○ OD ○ OS ● OU
[   ]   **Consent?**
[   ]   ● Yes ○ No ○ Deferred ○ Refused after edu.
Notes [   ]

ANTERIOR SEGMENT

	✕ OD	OD→OS	OD←OS	✕ OS	
Adnexa/Lids	No abnormalities ✕	↔	No abnormalities ✕	✕
Orbit		↔		✕
Lacrimal Gland		↔		✕
Lacrimal Drainage		↔		✕
Prea. Lym. Nodes		↔		✕
Lids- Upper		↔		✕
Lids -Lower		↔		✕
Conjunctiva	White & clear ✕	↔	White & clear ✕	✕
Bulbar		↔		✕
Palpebral		↔		✕
Cornea	Clear ✕	↔	Clear ✕	✕
Dye Type		↔		✕
Epithelium		↔		✕
Stroma		↔		✕
Endothelium		↔		✕
Tear Film		↔		✕
Ant. Chamber	Deep & clear ✕	↔	Deep & clear ✕	✕
Screening Depth		↔		✕

POSTERIOR SEGMENT

Methods	#1	90 D	#2	Indirect 20 D	#3		#4	

	✕ OD	OD→OS	OD←OS	✕ OS	
Vitreous	Clear; ✕	↔	PVD	✕
Optic Nerve					
C/D Ratio	Hz 0.10 ✕ ↔ Vt 0.10 ✕		Hz 0.10 ✕ ↔ Vt 0.10 ✕	✕
Appearance	Healthy; ✕	↔	Healthy; ✕	✕
Nerve Fiber Layer	Healthy; ✕	↔	Healthy; ✕	✕
Neural Rim		↔		✕
Margin	Distinct; ✕	↔	Distinct; ✕	✕
Optic Nerve Eval	☐ Not Performed		Reason --Select-- ∨	
Retina					
Foveal Reflex	Bright; ✕	↔	Bright; ✕	✕
Macula	Healthy; ✕	↔	Healthy; ✕	✕
Posterior Pole		↔		✕
Vessels	No MA's, exudates, or CWS; ✕	↔	No MA's, exudates, or CWS; ✕	✕
Periphery	Normal; ✕	↔	Normal; ✕	✕
ROP		↔		✕

☐ Macula: No DME OD   ☐ Macula: No DME OS

Dilated Macular Exam   ☐ Not Performed   Reason --Select-- ∨

Facesheet | Flowsheet | Encounter Hx | Encounter Details

- Intake Form ✓
- CC & History Review
- Medical History
- Preliminaries
- Refraction
- Contact Lens
- **Examination**
- Final Findings
- Electronic Files
- Drawing
- Encounter Summary
- Clinical Information Reconciliation (0)
- Decision Support Interventions (1)

Test F Record

Pt ID: 100001 | Enc ID: 256597 , **02/05/2025**

DOB: 01/01/2001 **(24 years)** F ⓘ | Loc: **Pickerington**

Prov: **Jay Henry** | Tech: --**Select**-- | Ref Phy: --

Normal | Copy Prev | Sign-Off | TRANSFER ▾

TONOMETRY

Topical Anesthetic Used

#	Method	Initials	Time	OD	OS	Actions	#
				No data to display			

Notes

ANTERIOR SEGMENT

	✕ OD	OD→OS	OD←OS	✕ OS
Adnexa/Lids	No abnormalities ✕	↔		No abnormalities ✕ ✕
Orbit		↔		✕
Lacrimal Gland		↔		✕
Lacrimal Drainage		↔		✕
Prea. Lym. Nodes		↔		✕
Lids- Upper		↔		✕
Lids -Lower		↔		✕
Conjunctiva	White & clear ✕	↔		White & clear ✕ ✕
Bulbar		↔		✕
Palpebral		↔		✕
Cornea	Clear ✕	↔		Clear ✕ ✕
Dye Type		↔		✕
Epithelium		↔		✕
Stroma		↔		✕
Endothelium		↔		✕
Tear Film		↔		✕
Ant. Chamber	Deep & clear ✕	↔		Deep & clear ✕ ✕
Screening Depth		↔		✕
Cells		↔		✕

DIL ... (dropdown list open)

- Annual Vision Exam
- Annual Vision Exam - New Patient
- Binocular Vision
- Cataract Post Op
- CL Follow Up
- DFE
- Diagnostic Tests and Injections
- Emergency
- Medication Rx Without Patient Visit
- Post Op
- Prog Check
- Refraction
- Rx Follow Up
- Telehealth
- Testing

#1 ... :00 PM

OS ⦿ OU

No Deferred used after

Annual Visio... EST

Annual Vision Exam
Annual Vision Exam - New Patient
Binocular Vision
Cataract Post Op
CL Follow Up
DFE
Diagnostic Tests and Injections
Emergency
Medication Rx Without Patient Visit
Post Op
Prog Check
Refraction
Rx Follow Up
Telehealth
Testing

Vitreous | Clear; ✕

Optic Nerve

C/D Ratio Hz 0.10 | Vt 0.10 ✕

#2 ✕ 20 D

OD→OS

Neural Rim

Margin | Distinct; ✕

Optic Nerve Eval ☐ Not Performed

Retina

Foveal Reflex | Bright; ✕
Macula | Healthy; ✕
Posterior Pole
Vessels | No MA's, exudates, or CWS; ✕
Periphery | Normal; ✕
ROP

☐ Macula: No DME OD

Dilated Macular Exam ☐ Not Performed

maximeves | Version: 1.1 ① | Your Training Courses | ◀◀ ◀ Record 80 of 80 ▶ ▶▶ | What's New?

Time Savings

- Code Complete and customized workflows together significantly decrease the amount of time spent charting
  - Less clicks per patient encounter
  - Easier workflow when you have the encounter forms designed for your preferences
  - Easier to see more patients in a day

MaximEyes®

Time Savings ROI

- Time saved with code complete and customized workflows
  - Allows on average 3-4 more patients per day per provider in our practice
    - 3 docs = 9+ more patients per day
    - 45-60 patients per week assuming 5-day week
    - 180-240 patients per month
    - 2250-3000 more patients per year (50 weeks)
- **Doctor time saved charting at the end of the day (for me was at least an hour = priceless)**

MaximEyes®

Potential Increased Patients Seen Due to Automated Coding and Custom Exam Workflows

12 extra patients
- Yearly: 3000
- Monthly: 240
- Weekly: 60

8 extra patients
- Yearly: 2000
- Monthly: 160
- Weekly: 40

6 extra patients
- Yearly: 1500
- Monthly: 120
- Weekly: 30

4 extra patients
- Yearly: 1000
- Monthly: 80
- Weekly: 20

2 extra patients
- Yearly: 500
- Monthly: 40
- Weekly: 10

Legend: ■ Yearly ■ Monthly ■ Weekly

Total Number of Extra Patients Seen

Inventory Management

Inventory Management

- Enhanced patient experience:
  - Streamlined processes
    - Reduced patient wait times
      - Leads to increased sales
    - Reduced administrative tasks

MaximEyes®

Inventory Management

- Enhanced patient experience:
  - Data Driven Decision making
    - What frames are hot sellers
    - What frames have been on the board too long
      - Can't rely on frame reps to manage this properly
    - Allows proper product mix and helps minimize over/under stocking

MaximEyes®

Inventory Management

- Enhanced patient experience:
  - Enhanced practice efficiencies
    - Allows increase in patients seen
    - Creates additional time to educate patients and provide quality care
      - Improves the patient experience

Inventory Management
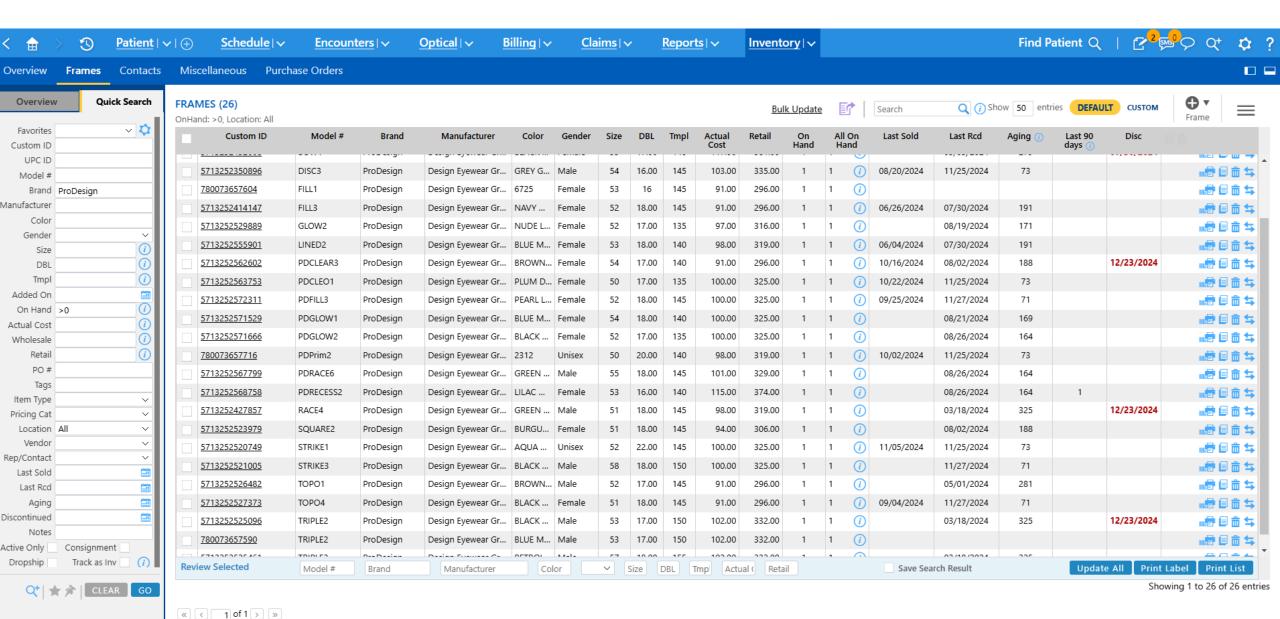
- Frames:
  - Quick and easy system to label and inventory frames
  - Ability to scan barcodes on frames
    - Reduces data entry errors
  - Easy reconciliation of on board inventory
  - Reports to manage all aspects of inventory
- Contacts:
  - Easy to load and track inventory on hand
  - Can integrate with distributers
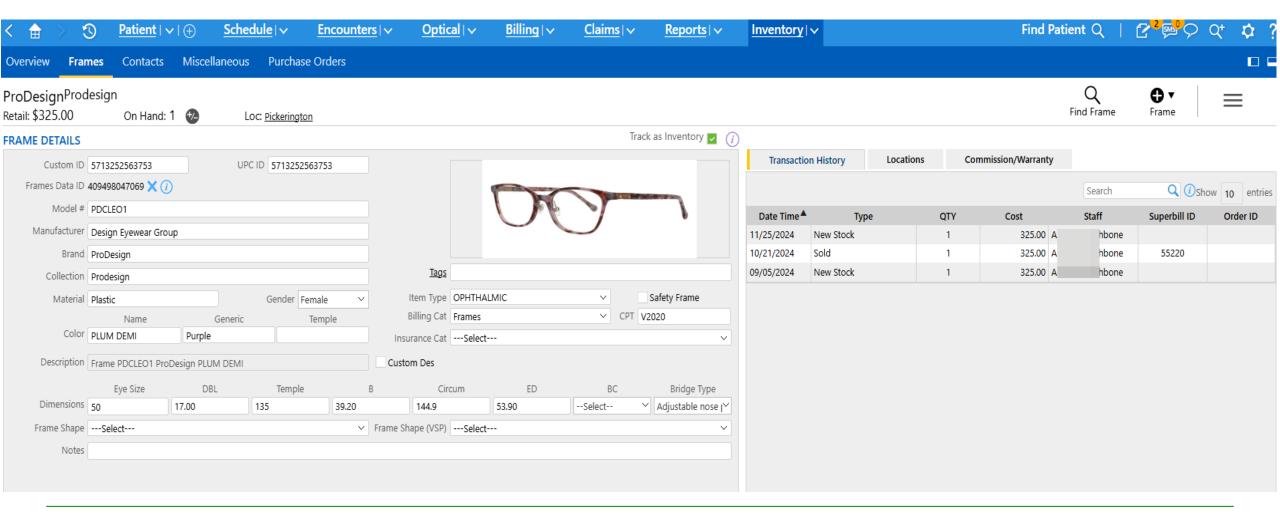
Frame Inventory Management

Frame Inventory Details

Frames Top Selling

Manufacturer	Brand	Collections	Model #	Custom ID	Generic Code	Gender	Retail	Added on Date	Last Sold	Sold	On Hand
Pickerington											
OGI Eyewear	OGI Eyewear	Red Rose by OGI Eyewear	MESTRE	796835166539	BLACK GOLD	Female	296.00	12/30/2024	12/30/2024	1	0
OGI Eyewear	OGI Eyewear	Red Rose by OGI Eyewear	GIOVANNA	796835166355	COPPER LEAF	Female	296.00	12/02/2024	12/02/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	THE BANK	796835139175	GREY TORTOISE	Male	283.00	07/30/2024	12/23/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	OH MY	796835144124	ROBIN TORTOISE	Female	283.00	04/02/2024	12/20/2024	1	1
OGI Eyewear	OGI Eyewear	OGI Eyewear	OH MY	796835144124	ROBIN TORTOISE	Female	283.00	04/02/2024	10/04/2024	1	1
OGI Eyewear	OGI Eyewear	OGI Eyewear	OH FOR CUTE	796835093149	GREY BLUSH FADE	Female	283.00	08/19/2024	11/26/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	OH FOR CUTE	796835093149	GREY BLUSH FADE	Female	283.00	08/19/2024	10/02/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	MOA	796835160391	CLOUDY BLUE	Female	283.00	07/24/2024	12/31/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	INDEED	796835160421	TANGERINE TORTOISE	Female	283.00	07/30/2024	10/08/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	HEY GUYS	796835143745	TURQUOISE NAVY CRUNCH	Female	309.00	04/26/2024	11/26/2024	1	0
OGI Eyewear	OGI Eyewear	OGI Eyewear	GOOD GRAVY	796835163125	GREY ROSE CARNIVAL	Female	283.00	08/02/2024	11/18/2024	1	1
OGI Eyewear	OGI Eyewear	OGI Eyewear	CUTIE PIE	796835120470	GREY/ROSE FADE	Female	296.00	12/16/2024	12/18/2024	1	1
OGI Eyewear	OGI Eyewear	OGI Eyewear	BAUHAUS	796835150859	CORAL AMETHYST TORTOISE FADE	Female	283.00	04/26/2024	10/16/2024	1	1
OGI Eyewear	OGI Eyewear	OGI Eyewear	BABE	796835167468	SKYLINE TORTOISE	Female	283.00	07/30/2024	11/22/2024	1	0
						Total for Location:	**$4027.00**			**14**	**5**
						Grand Total:	**$4027.00**			**14**	**5**

Frame Inventory Reports

Inventory Sales by Frame by Manufacturer and Brand Brief (New)
01/01/2025 to 01/31/2025

Brand	Type	No. of Units	% Units	Sales Charges	% Charges	Net Receipts (Patient & Insurance) (Line Item Level) Net Receipts, Refunds & Credits	% Net Receipts, Refunds & Credits	% of (Net Receipts, Refunds & Credits BY Charges)	Cost of Goods Cost	% Cost	% of (Cost BY Charges)	Profits Profit	% Profit	% of (Profit BY Charges)
Grand Totals	Sale	313	100.00%											
	Return/Ref/Cred	7	100.00%											
	Net Sales	306	100.00%											

Pickerington Location

Frame Manufacturer: Altair Eyewear

Brand	Type	No. of Units	% Units
Anne Klein	Sale	2	11.76%
Bebe	Sale	11	64.71%
JOE	Sale	4	23.53%
Subtotal for Frame Manufacturer: Altair Eyewear	Sale	17	5.43%
	Return/Ref/Cred		
	Net Sales	17	5.56%

Frame Manufacturer: Alternative Eyewear/Plan B Eyewear

Brand	Type	No. of Units	% Units
Indii Kids	Sale	1	100.00%
Subtotal for Frame Manufacturer: Alternative Eyewear/Plan B Eyewear	Sale	1	0.32%
	Return/Ref/Cred		
	Net Sales	1	0.33%

Frame Manufacturer: Design Eyewear Group

Brand	Type	No. of Units	% Units
ProDesign	Sale	6	100.00%
Subtotal for Frame Manufacturer: Design Eyewear Group	Sale	6	1.92%
	Return/Ref/Cred		
	Net Sales	6	1.96%
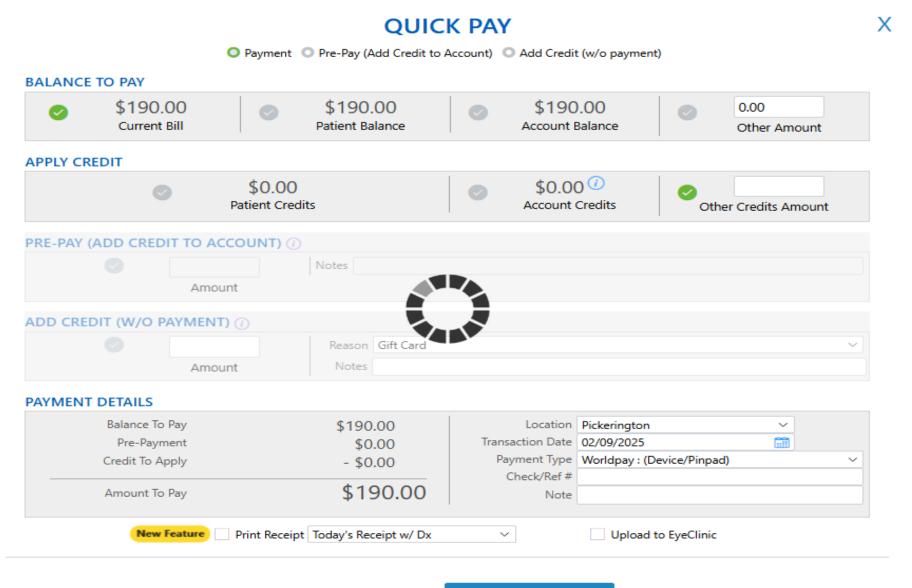
Integrated Payment Solutions

Integrated Payment Solutions

- Credit card payment solutions can save a significant amount of staff time
  - Collecting full payment at time of service is quick and easy
    - Auto posting of the proper amount collected to the patient account is a significant time saver at the end of the day with balancing
  - If a patient "forgets their wallet" a payment link can be sent directly to their phone or email
  - A payment link can also be posted in their patient portal
  - A patient can pay for contacts or glasses after going home to discuss the purchase if needed

In Office Check Out

QUICK PAY

X

○ Payment ○ Pre-Pay (Add Credit to Account) ○ Add Credit (w/o payment)

BALANCE TO PAY

| ✓ | $190.00 Current Bill | ○ | $190.00 Patient Balance | ○ | $190.00 Account Balance | ○ | 0.00 Other Amount |

APPLY CREDIT

| ○ | $0.00 Patient Credits | ○ | $0.00 ⓘ Account Credits | ✓ | Other Credits Amount |

PRE-PAY (ADD CREDIT TO ACCOUNT) ⓘ

| ○ | Amount | Notes |

ADD CREDIT (W/O PAYMENT) ⓘ

| ○ | Amount | Reason | Gift Card ▼ |
| | | Notes | |

PAYMENT DETAILS

Balance To Pay	$190.00	Location	Pickerington ▼
Pre-Payment	$0.00	Transaction Date	02/09/2025 📅
Credit To Apply	- $0.00	Payment Type	Worldpay : (Device/Pinpad) ▼
		Check/Ref #	
Amount To Pay	$190.00	Note	

New Feature ☐ Print Receipt Today's Receipt w/ Dx ▼   ☐ Upload to EyeClinic

Make Payment By Line   **Post Payment**

In Office Auto Posting

PAY/ADJ HX TRANSACTIONS ⓘ Encounter ID: | Order ID:

Payment Date ⓘ	Paid By	Patient Paid	Pt Adj/Discount	Credit Added	Credit Used	Pt Refund
02/09/2025	Minnie Mouse	190.00	0.00	0.00	0.00	0.00

MaximEyes®

Payment Link via Mobile Phone

Click the link below to pay your account balance of 190.
https://payments.maximeyes.com?id=f0f36a1b-47cb-4f9d-8671-6028871dffdb-887
Hermann & Henry Eyecare, Inc.
(614) 833-2400

MaximEyes®
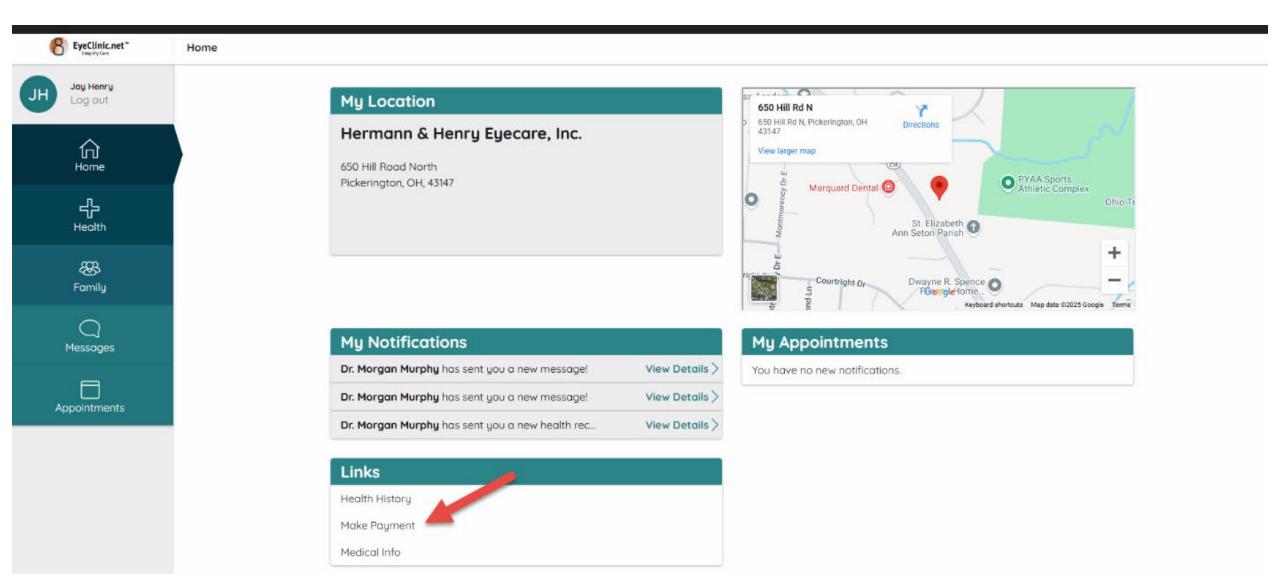
ONLINE PAYMENT TO HERMANN & HENRY EYECARE, INC.

Please pay the amount below at the time of receiving this notification. Due to HIPAA requirements we are not able to send additional information about your account. Please refer to your statement or give us a call at (614) 833-2400 for any questions.

Balance Due : $190.00

Card Information   * Denotes a required field

* Card Number: [_____] 👁

* Expiration: [Month ⇕] [Year ⇕]

CVV: [_____] 👁

Transaction Information

Amount: $190.00

[PROCESS TRANSACTION]   Cancel Transaction

Payment Link: Patient Online Portal

Payment Link: Patient Online Portal

ONLINE PAYMENT TO HERMANN & HENRY EYE CARE, INC. --HERMANN & HENRY (OH)

Please pay the amount below at the time of receiving this notification. Due to HIPAA requirements we are not able to send additional information about your account. Please refer to your statement or give us a call at for any questions.

Balance Due : $175.00

Card Information   * Denotes a required field

* Card Number: [_____ ⊙]

* Expiration: [Month ▾] [Year ▾]

CVV: [____ ⊙]

Transaction Information

Amount: $175.00

PROCESS TRANSACTION   Cancel Transaction

Integrated Payment Solutions
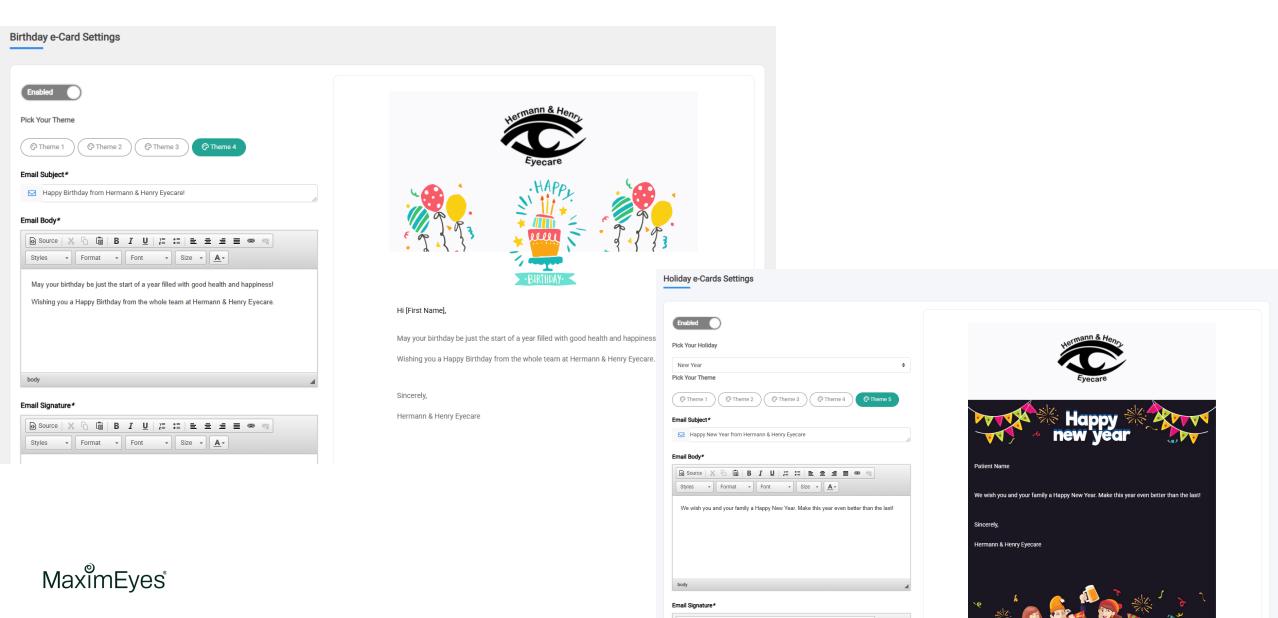
- Auto posting of payments at checkout saves a few minutes per each transaction
- Prior to the integrated credit card solution, we would spend 30-60+ minutes at the end of each day to reconcile or balance
  - Often, we were just looking for a penny or a dollar that was entered incorrectly
- With the integrated solution we now typically spend about 5-10 minutes to balance and close out each day
- **Staff time savings 60+ mins / day**

Patient Engagement

MaximEyes®

Patient Engagement

- Customizable messages for any needs
  - Appointment reminders, glasses/CL orders ready, Happy Birthday, holidays, annual exam recalls, overdue appointment recalls
    - Significant decrease in patient no-show rates with text and email appointment reminders
- Can communicate directly via text from within the EHR to our patients
  - This is not just a trend but a patient expectation
  - Saves staff time on the phone
- Can easily select a group of patients to text
  - For example: emergency office closure: all patients scheduled that day sent a text message

MaxımEyes®

Patient Engagement
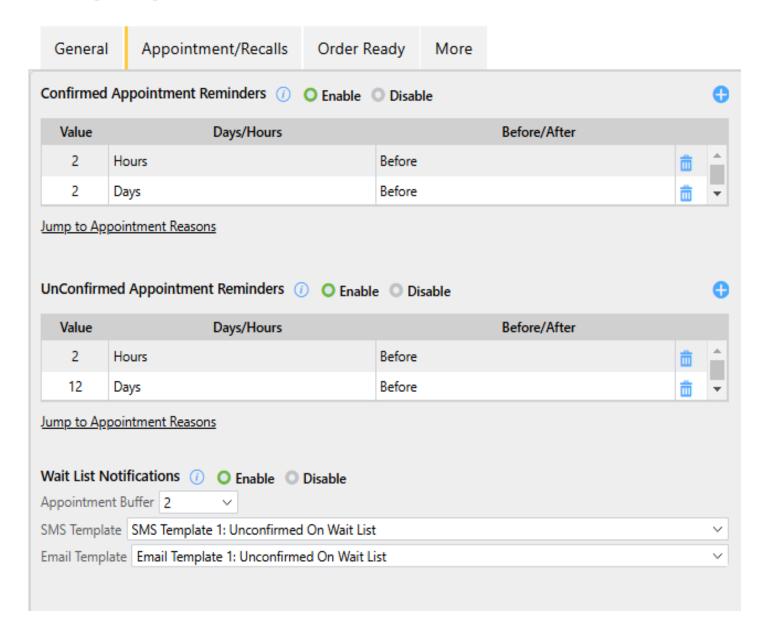
- Can send welcome forms, policy forms, HIPAA privacy practice, payment links, optional testing forms (Optos)
  - Custom online patient intake forms are a huge staff time saver
    - Patients can enter the data, and it syncs with our EHR
    - Frees staff from redundant data entry
- **Saves 5-10 mins per each patient**

Patient Engagement

- Online scheduling is also available
  - Research shows 67% of patients prefer to schedule online and 40% prefer to do it after hours
- Appointment reminders, order ready notifications, texting direct with patients, online scheduling, patient intake forms and other engagement features = significant staff time savings
  - **This time savings has allowed us to grow significantly in patient encounters without adding additional staff**

MaximEyes®

Birthday & Holiday Messages

MaximEyes®

Patient Engagement: Confirm Appointments
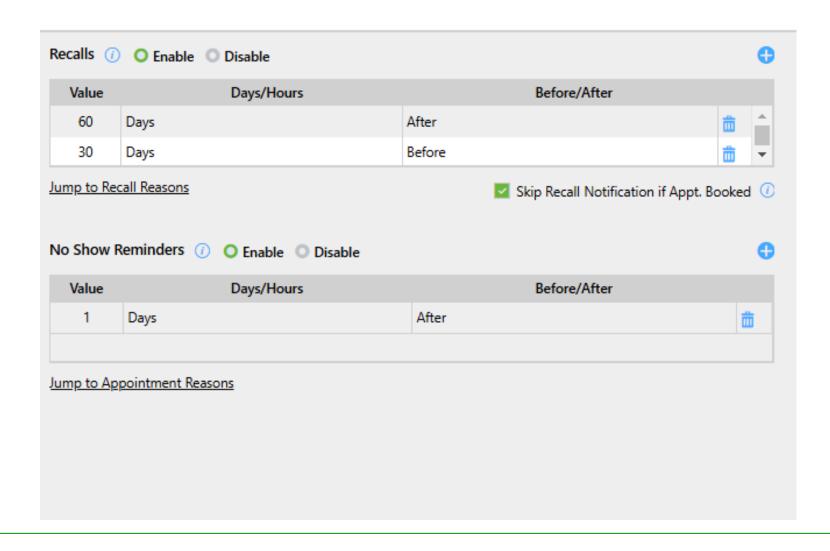
Confirm your appointment on Mon 02-10-2025 07:10 AM with Dr. Jay Henry Click the link to confirm: https://p.maximeyes.com/qnnk91 Optout=https://p.maximeyes.com/CduXro

Your appointment has been confirmed.
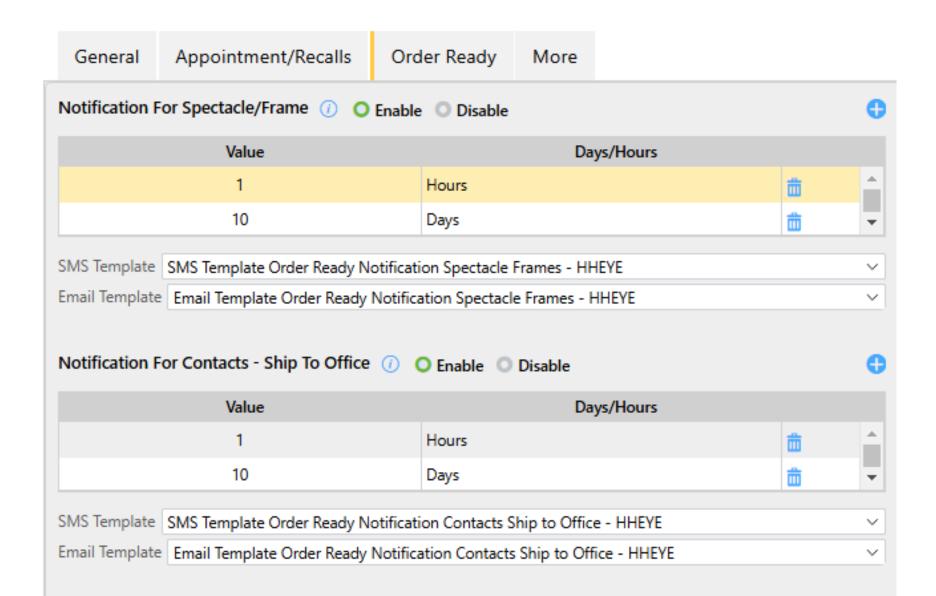
Hermann & Henry Eyecare, Inc. - Pickerington (614) 833-2400 Appt: Mon 02-10-2025 07:10 AM Prior to your visit, https://p.maximeyes.com/cj3VCF to complete the online check-in process. Optout=https://p.maximeyes.com/vpwTz2

Patient Engagement: Recall

Our Records indicate you are due for an eye examination. Please call [(614) 833-2400](tel:6148332400) to book your appointment. Hermann & Henry Eyecare, Inc.

Patient Engagement: Order Status

General	Appointment/Recalls	Order Ready	More

Notification For Spectacle/Frame ⓘ ◉ Enable ○ Disable ⊕

Value	Days/Hours	
1	Hours	🗑
10	Days	🗑

SMS Template | SMS Template Order Ready Notification Spectacle Frames - HHEYE ⌄ |

Email Template | Email Template Order Ready Notification Spectacle Frames - HHEYE ⌄ |

Notification For Contacts - Ship To Office ⓘ ◉ Enable ○ Disable ⊕

Value	Days/Hours	
1	Hours	🗑
10	Days	🗑

SMS Template | SMS Template Order Ready Notification Contacts Ship to Office - HHEYE ⌄ |

Email Template | Email Template Order Ready Notification Contacts Ship to Office - HHEYE ⌄ |

Morgan, your glasses have arrived! No appointment needed to pick up. Hermann & Henry Eyecare, Inc. (614) 833-2400

Minnie, your contacts have arrived! No appointment needed to pick up.
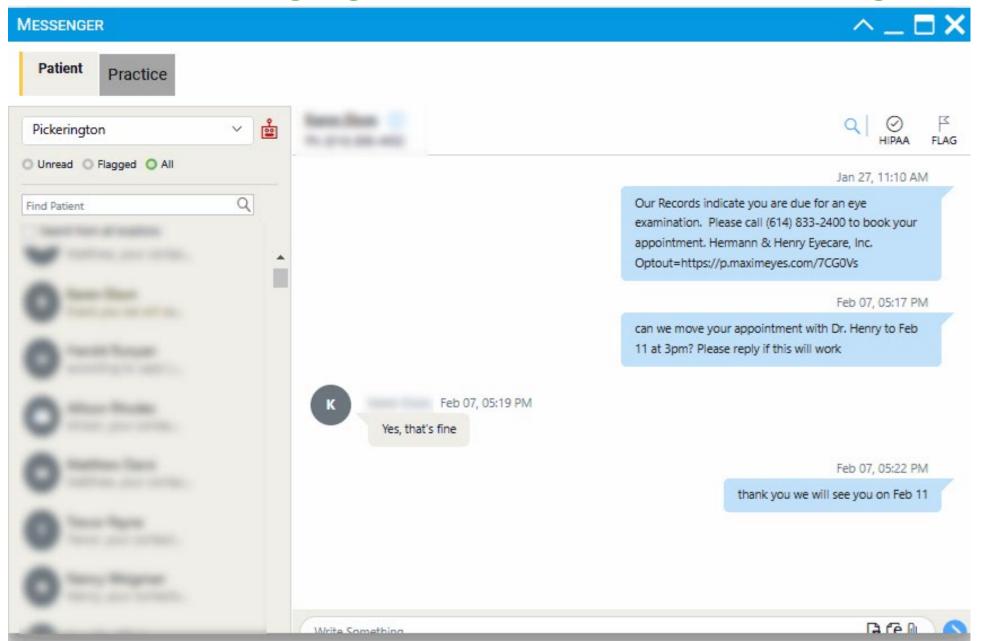
Hermann & Henry Eyecare, Inc. (614) 833-2400

Patient Engagement: Advanced Features
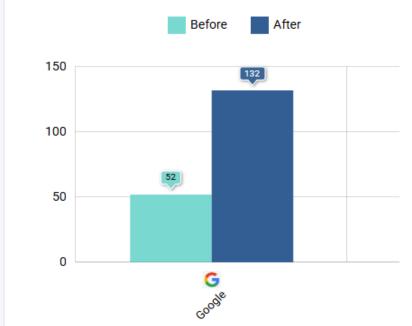
Patient Engagement: Text Messenger

Patient Engagement: Reputation Management

Before and After Report with MaximEyes

Reviews

Where You Started		Current Status
89	→	169
Total Reviews		Total Reviews

Ratings

Where You Started		Current Status
4.6	→	4.7
★★★★⯪		★★★★⯪

Before   After

150

132

100

52

50

0

Google

MaximEyes®

Patient Engagement: Reputation Management

★★★★★

Jan 29, 2025

Shared On **Google**   Review for **Pickerington**

This place is top notch! They actually take the time to listen to you and carefully explain everything in detail.

★★★★★

Feb 02, 2025

Shared On **Google**   Review for **Pickerington**

Dr. Henry and his staff are outstanding.

★★★★★

Jan 27, 2025

Shared On **Google**   Review for **Pickerington**

Great facility! Staffed with friendly, professional staff... and the doctors are great too. Very thorough; excellent service.

MaximEyes®

Patient Engagement: Reports

- Significant increase in the number of reviews

Cumulative Reputation Trend (Google)

Patient Engagement: Reports

Survey Responses From Text & Email

Responses From Texts — 306
Responses From Emails — 144

See delivery report

Responses From Texts **306** | Responses From Emails **144**

MaximEyes®

Patient Engagement: Reports

![Orders Notified Last 14 Days bar chart with line overlay. Legend: blue = Orders Notified, black = Average by Day of Week. Data by date: Sat January 25, 2025: 0 (avg 0); Sun January 26, 2025: 0 (avg 0); Mon January 27, 2025: 73 (avg 79); Tue January 28, 2025: 48 (avg 56); Wed January 29, 2025: 25 (avg 12); Thu January 30, 2025: 0 (avg 0); Fri January 31, 2025: 56 (avg 84); Sat February 01, 2025: 0 (avg 0); Sun February 02, 2025: 0 (avg 0); Mon February 03, 2025: 73 (avg 148); Tue February 04, 2025: 48 (avg 55); Wed February 05, 2025: 25 (avg 55); Thu February 06, 2025: 0 (avg 0); Fri February 07, 2025: 56 (avg 37); Sat February 08, 2025: 0 (avg 0).](attachment)

MaximEyes®

AI Insurance Eligibility Tools

MaximEyes®

AI Insurance Eligibility Tool

- AI insurance eligibility tool automatically checks patient insurance eligibility and pulls the information into the EHR
- AI eligibility tool will run in the background
  - Checks all patients' insurances (vision and medical) for eligibility information
  - Can schedule to check 3-5 days before upcoming appointments
- Can use for emergency appointments at time of service
  - Allows us to collect proper copays and to know if deductibles have been met

MaximEyes®

AI Insurance Eligibility Tool

- Don't have to log into multiple websites to gather information
  - AI tool works with:
    - Spectera, EyeMed, VSP, Medicare, Anthem, Aetna, and hundreds of others
- This has been a staff favorite
- Insurance authorizations in our office
  - 70+ patients/day at 4 minutes/patient = 4+ hours
- **This tool is saving us 4+ hours a day on staff time**

AI Eligibility Tool

Member Id: ▓▓▓▓

Routine

Medical

	Service	Member is Eligible?	Member Eligible As Of*	Service Frequency
	Exam	Yes	10/01/2017	Once every year from the date of service
	Lenses	Yes	10/01/2017	Once every year from the date of service
	Frame	Yes	10/01/2017	Once every 2 years from the date of service
	Contact Lenses	Yes	10/01/2017	Once every year from the date of service
	Contact Lens Fit and Follow-up	Yes	10/01/2017	Unlimited

Medical

Additional Purchase

	Service	Member is Eligible?	Member Eligible As Of*	Service Frequency
	Lenses	Yes	10/01/2017	Unlimited
	Frame	Yes	10/01/2017	Unlimited
	Contact Lenses	Yes	10/01/2017	Unlimited

Benefits

Vision Care Services	In-Network Member Cost
Exam Services	
Exam	$10 copay
Retinal Imaging	Up to $39
Contact Lens Fit and Follow-Up	
Fit and Follow-up - Standard	Up to $40
Fit and Follow-up - Premium	10% off retail price
Frame	
Frame	$0 copay; 20% off balance over $130 allowance
Lenses	
Single Vision	$15 copay
Bifocal	$15 copay
Trifocal	$15 copay
Lenticular	$15 copay
Progressive - Standard	$30 copay
Progressive - Premium Tier 1	$110 copay
Progressive - Premium Tier 2	$120 copay
Progressive - Premium Tier 3	$135 copay

REF DOC

MemberId : [REDACTED]
Subscriber : [REDACTED] , DOB : 04/06/1972
subscriberRelationship : Self
Patient : [REDACTED] , DOB : 04/06/1972
Payer : ANTHEM BLUE CROSS BLUE SHIELD
insuranceType : Preferred Provider Organization (PPO)
EFF : Jan 01, 2025 - Dec 31, 9999
plan / Product : PPO - TRADITIONAL PLAN
Ind ded : $1000 Remaining
Ind ded : $1000 Total
Ind oop : $5189.98 Remaining
Ind oop : $5250 Total
OV CoInsurance : 0%
Spl Copay : $40
OV Copay : $30
Routine Exam - Non Covered
Vision Not Covered
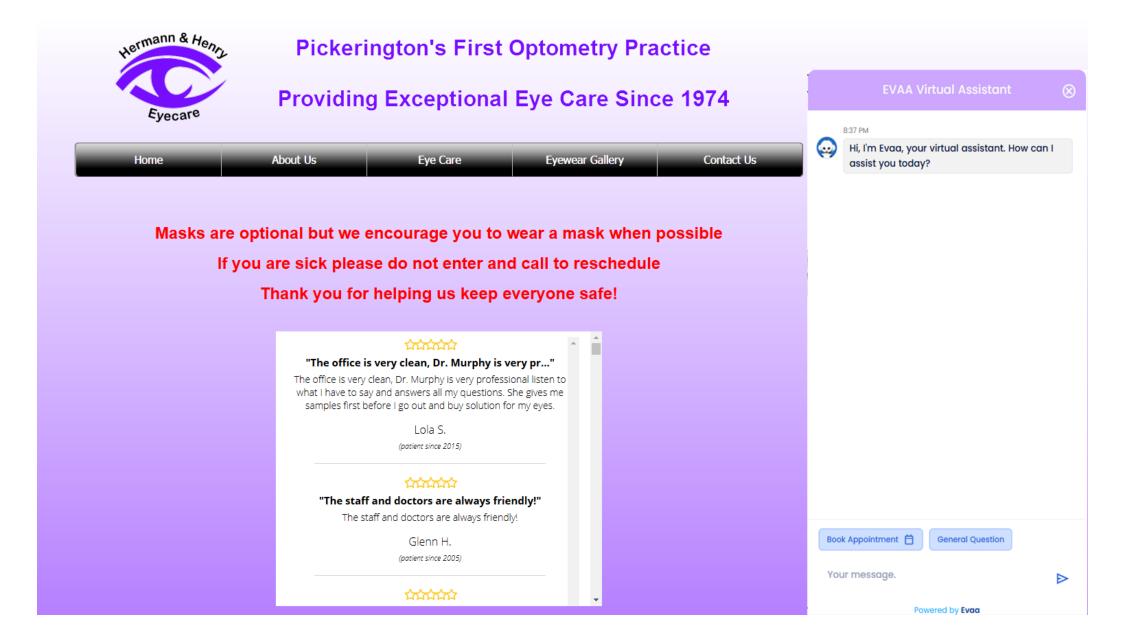
VSP PATIENT RECORD REPORT

PATIENT IDENTIFICATION

Patient Name	Auth#
Relationship **Member**	Auth Eff Date **09/20/2024**
Member Name	Auth Exp Date **10/20/2024**
	Birth Date **12/27/1977**

EYE HEALTH MANAGEMENT CONDITIONS (check all that apply)

SYSTEMIC CONDITIONS: ☐ HIGH RISK FOR PREDIABETES ☐ DIABETES ☐ HYPERTENSION ☐ HIGH CHOLESTEROL

OCULAR CONDITIONS: ☐ DIABETIC RETINOPATHY ☐ GLAUCOMA ☐ AMD ☐ NONE OF THESE 7 CONDITIONS

☐ DILATION PERFORMED ☐ PCP COMMUNICATION COMPLETED/PLANNED

PATIENT COVERAGE

Eligibility	Exam/ProfSvcs *06/01/2025*	Lens **Yes**	Frame **Yes** Contact Lens Exam **Yes**	Contacts **Yes**
Service Freq	Exam *Every 12 months.*	Lens *Every 12 months.*	Frame *Every 12 months.*	Contact Lens Exam *Every 12 months.*	Contacts *Every 12 months.*

Benefit *VSP Choice Plan* **Client Name** *PRINCIPAL INSURED CO-BRANDED VISION*

Network *Choice* **Lab Use** *Must use plan designated contract laboratory.*

PLAN DETAILS

Co-payments Exam *$10.00 06/01/2025* Material *$25.00*

Routine Retinal Screening *Charge the lesser of $39.00 or U&C*

Frame Allowance *Extra $20 promotion on Altair Eyewear/Marchon frames and any other available frame promotions included below:*

WFA73 $190.00 for bebe, Converse, Dragon or Nike brand frames through 01/31/2025. Patient receives 20% savings on frame overage.

WFA65 $170.00 for Altair Eyewear/Marchon frames. Patient receives 20% savings on frame overage.

WFA57 $150.00 for non-Altair Eyewear/Marchon frames. Patient receives 20% savings on frame overage.

Contacts *Routine eye exam covered.*

CL Exam Services *Charge the lesser of $60 copay or 85% U&C.*

CL Materials *$150.00*

Contacts are instead of [lens, frame].

Necessary Contact Lenses *Criteria applies; see VSP Manual. Copay $25.00.*

Low Vision *Criteria Applies see VSP Manual.*

Value Added Benefits *20% complete additional pair of glasses, including non-prescription plano sunglasses and blue light filtering glasses, from a VSP doctor within 12 months of routine exam.*
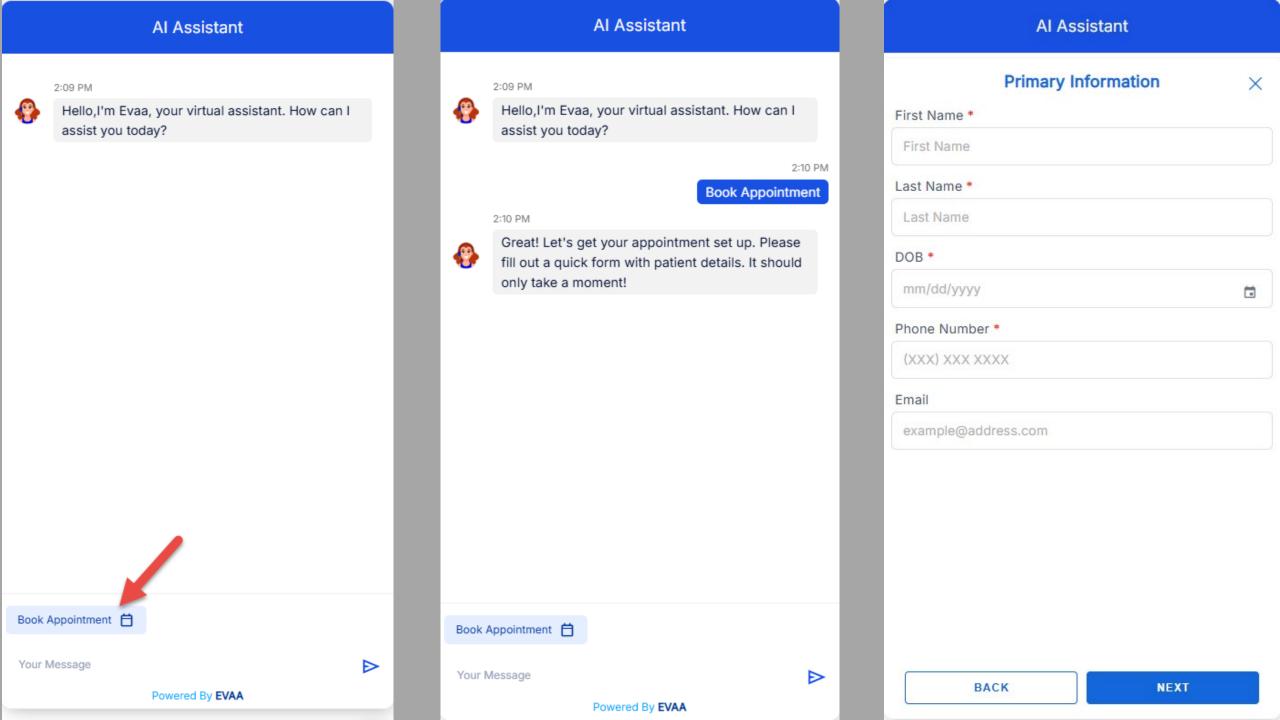
15% contact lens exam services from a VSP doctor for 12 months on or following date of routine exam.

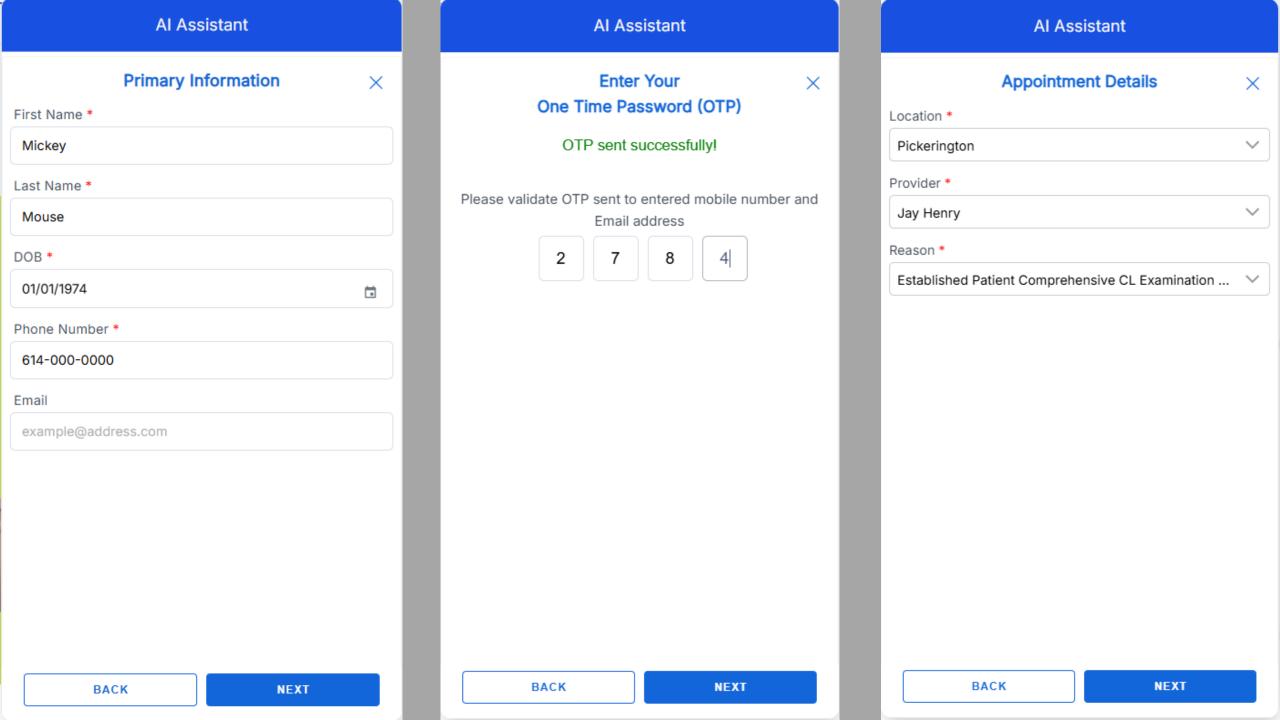# AI Technologies

AI Technologies

- Efficient Administrative Tasks:
  - AI can automate administrative tasks, such as appointment scheduling, insurance eligibility, data entry / dictation, order status, billing, and general questions
- Can significantly reduce staff phone time
  - Reduce phone volume
  - Reduce staff time checking and returning voice mail
- Freeing up staff and doctors to be more efficient and allow more time to spend providing quality care

MaximEyes®

AI Technologies

- Leveraging AI will reshape the future of healthcare
  - AI has the potential to revolutionize healthcare by improving diagnostics, personalizing treatment, streamlining operations and improving efficiencies
  - Rather than simply automating tasks, AI is about developing technologies that can enhance patient care across healthcare settings
  - The goal is patient centered intelligent engagement

AI Technologies

- How are we using AI currently?
  - EyeClinic Virtual AI Assistant (EVAA) can and/or will be able to:
    - Schedule patients from our website
      - Check appointment times
      - Cancel appointments
      - Reschedule appointments
    - Intercept voicemails / busy phone lines and interact with patients via chat
    - Check glasses and contact lens order status
    - Check billing
    - Insurance verification and insurance changes
      - EVAA, AI technology will read insurance card and update patients record

MaximEyes®

AI Technologies

2:09 PM

Hello,I'm Evaa, your virtual assistant. How can I assist you today?

Book Appointment 📅

Your Message ➤

Powered By **EVAA**

2:09 PM

Hello,I'm Evaa, your virtual assistant. How can I assist you today?

2:10 PM

Book Appointment

2:10 PM

Great! Let's get your appointment set up. Please fill out a quick form with patient details. It should only take a moment!

Book Appointment 📅

Your Message ➤

Powered By **EVAA**

Primary Information ✕

First Name *

First Name

Last Name *

Last Name

DOB *

mm/dd/yyyy 📅

Phone Number *

(XXX) XXX XXXX

Email

example@address.com

BACK | NEXT

AI Assistant

Primary Information ✕

First Name *

Mickey

Last Name *

Mouse

DOB *

01/01/1974 📅

Phone Number *

614-000-0000

Email

example@address.com

BACK   NEXT

AI Assistant

Enter Your
One Time Password (OTP) ✕

OTP sent successfully!

Please validate OTP sent to entered mobile number and
Email address

2   7   8   4

BACK   NEXT

AI Assistant

Appointment Details ✕

Location *

Pickerington ⌄

Provider *

Jay Henry ⌄

Reason *

Established Patient Comprehensive CL Examination ... ⌄

BACK   NEXT

Choose Your Appointment Date ✕

2025

‹ **February 2025** ›

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

BACK   NEXT

Choose Time Slot ✕

🕐 20 mins

08:50 AM	09:10 AM
09:20 AM	09:40 AM
10:00 AM	10:20 AM
10:40 AM	11:00 AM
11:20 AM	11:30 AM
01:20 PM	01:40 PM
02:00 PM	02:10 PM

BACK   SUBMIT
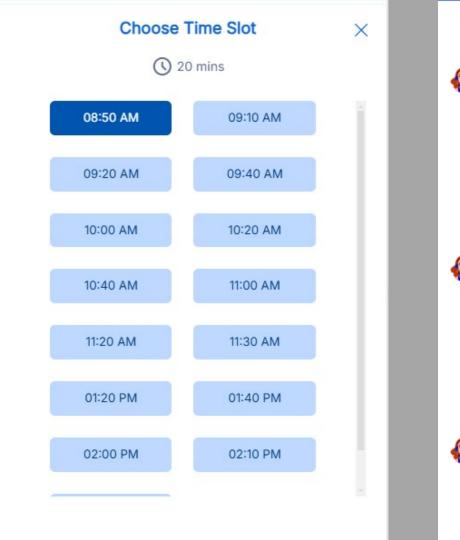
Book Appointment

2:16 PM

Great! Let's get your appointment set up. Please fill out a quick form with patient details. It should only take a moment!

2:19 PM

✓

Your appointment has been booked.

Mickey Mouse
Location: **Pickerington**
Provider: **Jay Henry**
Reason: **Established Patient Comprehensive CL Examination with Dr. Jay**
Date: **02/14/2025**
Time: **08:50 AM**

2:19 PM

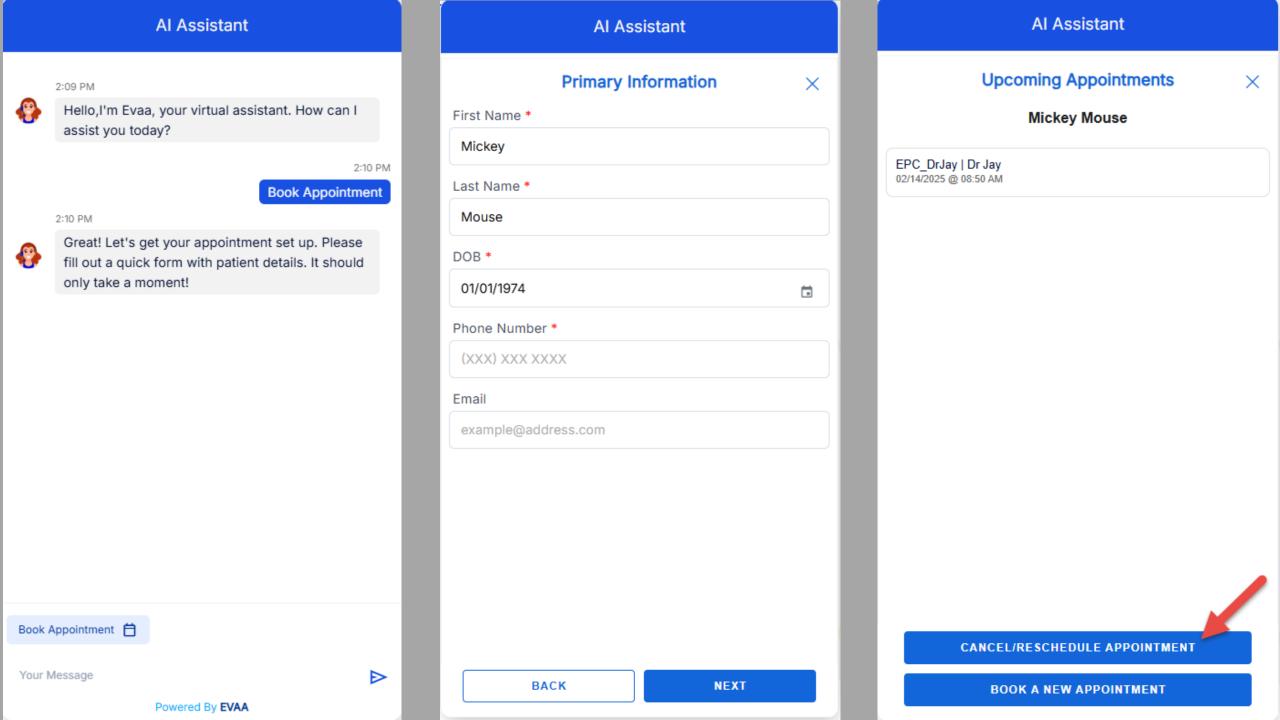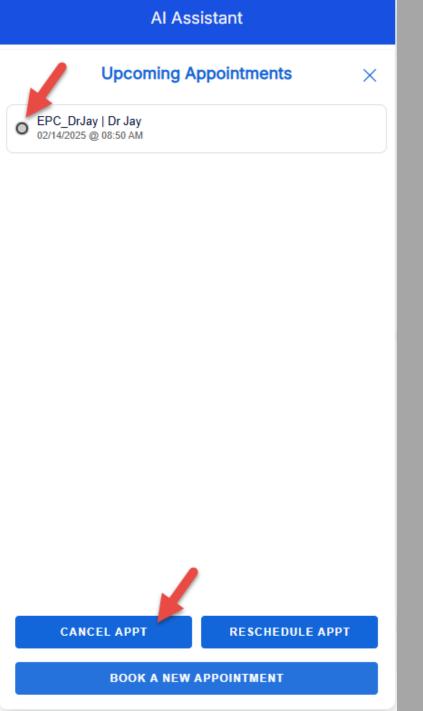Is there anything else I can assist you with?
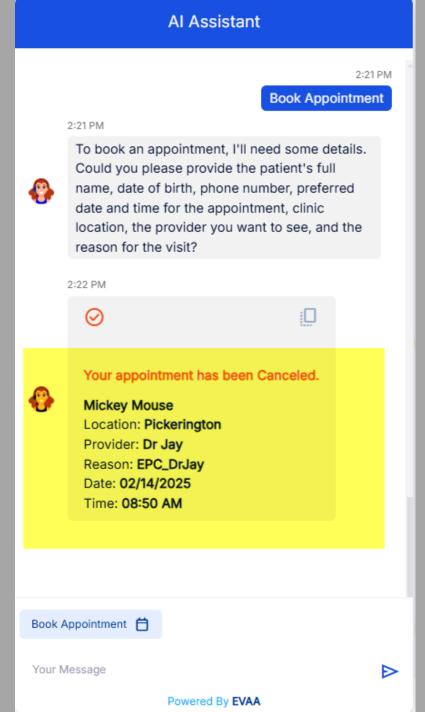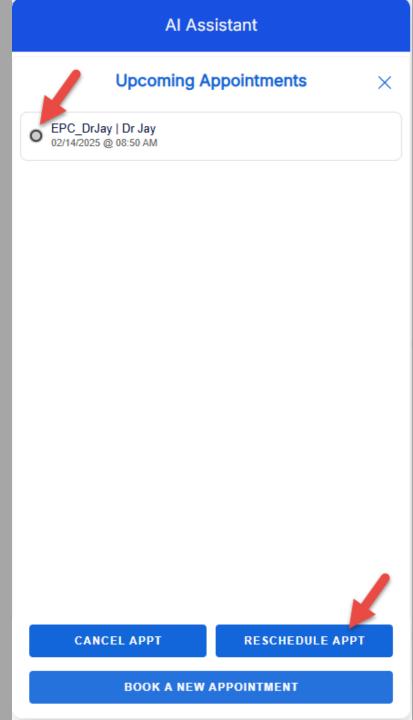
Book Appointment 📅

Your Message ▷

Panel 1 — AI Assistant (Chat)

AI Assistant

2:09 PM
Hello,I'm Evaa, your virtual assistant. How can I assist you today?

2:10 PM
Book Appointment

2:10 PM
Great! Let's get your appointment set up. Please fill out a quick form with patient details. It should only take a moment!

Book Appointment 📅

Your Message ➤

Powered By **EVAA**

Panel 2 — AI Assistant (Primary Information)

AI Assistant

Primary Information ✕

First Name *
Mickey

Last Name *
Mouse

DOB *
01/01/1974 📅

Phone Number *
(XXX) XXX XXXX

Email
example@address.com

BACK   NEXT

Panel 3 — AI Assistant (Upcoming Appointments)

AI Assistant

Upcoming Appointments ✕

Mickey Mouse

EPC_DrJay | Dr Jay
02/14/2025 @ 08:50 AM

CANCEL/RESCHEDULE APPOINTMENT

BOOK A NEW APPOINTMENT

AI Assistant

Upcoming Appointments ✕

○ EPC_DrJay | Dr Jay
02/14/2025 @ 08:50 AM

CANCEL APPT   **RESCHEDULE APPT**

BOOK A NEW APPOINTMENT

AI Assistant

2:21 PM

Book Appointment

2:21 PM

To book an appointment, I'll need some details. Could you please provide the patient's full name, date of birth, phone number, preferred date and time for the appointment, clinic location, the provider you want to see, and the reason for the visit?

2:22 PM

✓

Your appointment has been Canceled.

Mickey Mouse
Location: **Pickerington**
Provider: **Dr Jay**
Reason: **EPC_DrJay**
Date: **02/14/2025**
Time: **08:50 AM**

Book Appointment 📅

Your Message ➤

Powered By **EVAA**

AI Assistant

Upcoming Appointments ✕

○ EPC_DrJay | Dr Jay
02/14/2025 @ 08:50 AM

CANCEL APPT   **RESCHEDULE APPT**

BOOK A NEW APPOINTMENT

Choose Time Slot

🕐 20 mins

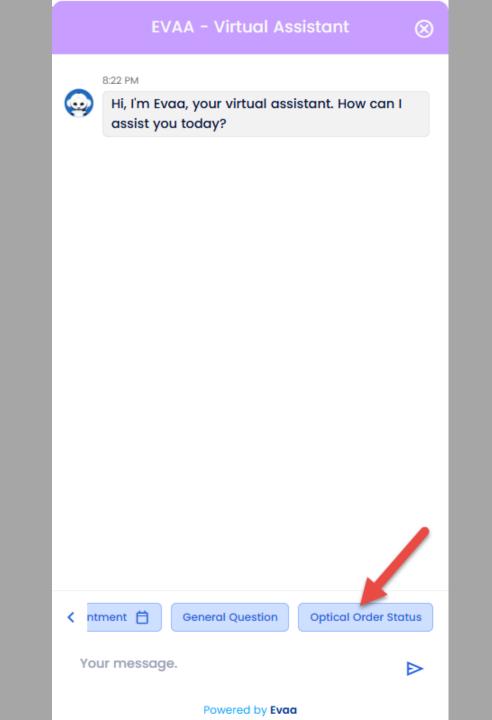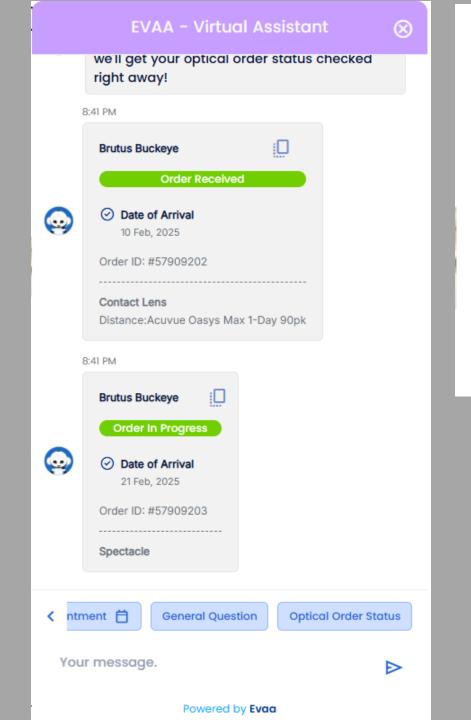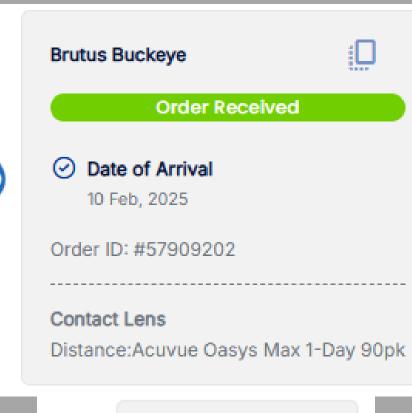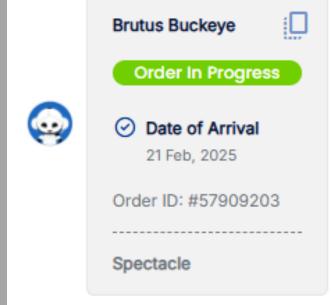|	
08:30 AM	09:10 AM
09:20 AM	09:40 AM
10:00 AM	10:20 AM
10:40 AM	11:00 AM
11:20 AM	11:30 AM
01:20 PM	01:40 PM
02:00 PM	02:10 PM

BACK   SUBMIT

Book Appointment

2:48 PM

Great! Let's get your appointment set up.
Please fill out a quick form with patient details.
It should only take a moment!

2:51 PM

✓

Your appointment has been booked.

Mickey Mouse
Location: **Pickerington**
Provider: **Jay Henry**
Reason: **Established Patient Comprehensive CL Examination with Dr. Jay**
Date: **02/14/2025**
Time: **09:10 AM**

2:51 PM

Is there anything else I can assist you with?

Book Appointment 📅

Your Message

AI Assistant Order Status

MaximEyes®

8:22 PM

Hi, I'm Evaa, your virtual assistant. How can I assist you today?

ntment 📅 | General Question | Optical Order Status

Your message.

we'll get your optical order status checked right away!

8:41 PM

Brutus Buckeye

Order Received

✓ **Date of Arrival**
10 Feb, 2025

Order ID: #57909202

Contact Lens
Distance:Acuvue Oasys Max 1-Day 90pk

8:41 PM

Brutus Buckeye

Order In Progress

✓ **Date of Arrival**
21 Feb, 2025

Order ID: #57909203

Spectacle

< ntment 📅 | General Question | Optical Order Status

Your message.   ➤

Powered by Evaa

Brutus Buckeye

Order Received

✓ **Date of Arrival**
10 Feb, 2025

Order ID: #57909202

Contact Lens
Distance:Acuvue Oasys Max 1-Day 90pk

Brutus Buckeye

Order In Progress

✓ **Date of Arrival**
21 Feb, 2025

Order ID: #57909203

Spectacle

AI Assistant General Questions

MaximEyes®

Screen 1:

EVAA – Virtual Assistant

1:33 PM
Hi, I'm Evaa, your virtual assistant. How can I assist you today?

1:33 PM
What are your hours

1:33 PM
Our office hours are Monday and Tuesday from 7:00 AM to 5:30 PM, Wednesday from 8:30 AM to 8:00 PM, and Friday from 8:30 AM to 5:30 PM for all locations.

Book Appointment   Optical Order Status   Testin

Your message

Powered by Evaa

Screen 2:

EVAA – Virtual Assistant

1:49 PM
Hi, I'm Evaa, your virtual assistant. How can I assist you today?

1:49 PM
Do you take vsp

1:49 PM
Yes, we are providers for VSP and many other insurance companies at all our locations.

Book Appointment   Optical Order Status   Testin

Your message

Powered by Evaa

Screen 3:

EVAA – Virtual Assistant

1:33 PM
Hi, I'm Evaa, your virtual assistant. How can I assist you today?

1:33 PM
What are your hours

1:33 PM
Our office hours are Monday and Tuesday from 7:00 AM to 5:30 PM, Wednesday from 8:30 AM to 8:00 PM, and Friday from 8:30 AM to 5:30 PM for all locations.

1:34 PM
Who is Dr murphy

1:34 PM
Dr. Murphy is an Optometrist at Hermann & Henry Eyecare. She graduated from The Ohio State University College of Optometry.

Book Appointment   Optical Order Status   Testin

Your message

Powered by Evaa

AI Technologies

- Time saving features:
- EVAA (AI / virtual assistant): if AI fields 50% of calls / questions, saves at least 8 hours a day
  - Scheduling
  - Order status
  - General questions
  - Billing
  - Insurance verification

MaximEyes®

ROI with AI Technologies

- Staff phone time/day
  - 60+ scheduling calls at 5–10 minutes/call
    - 600 minutes = 10 hours
  - 20+ bill pay at 10 minutes/call
    - 200 minutes = 3.33 hours
  - 15+ order status calls at 2–5 minutes/call (sometimes more depending on complexity)
    - 75 minutes
  - 20+ general questions at around 5 minutes/call
    - 100 minutes
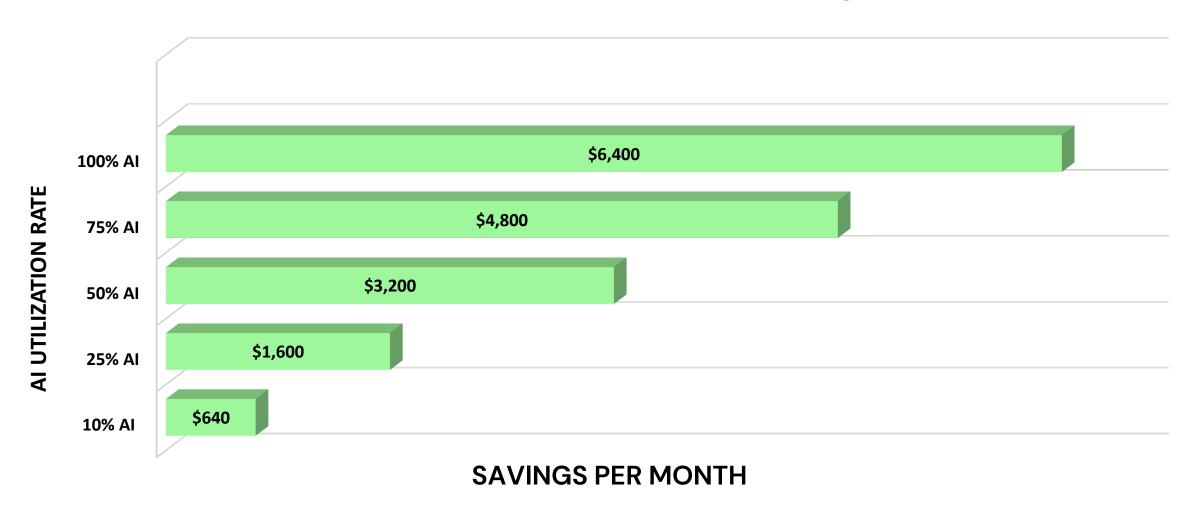- **Grand total: almost 1000 minutes/day phone time = over 16 staff hours on the phone**

Savings Using AI

- Over 320 hours/month of staff phone time
- Salary around $14-15/hour = $4800/month
- Salary around $17-18/hour = $5760/month
- Salary around $18-20/hour = $6400/month

Innovative EHR Technologies: Driving Efficiency and Excellence in Healthcare

QUESTIONS?

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Morgan L. Murphy, OD, FAAO

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