To: All WRS Users

From: WRS Development Team

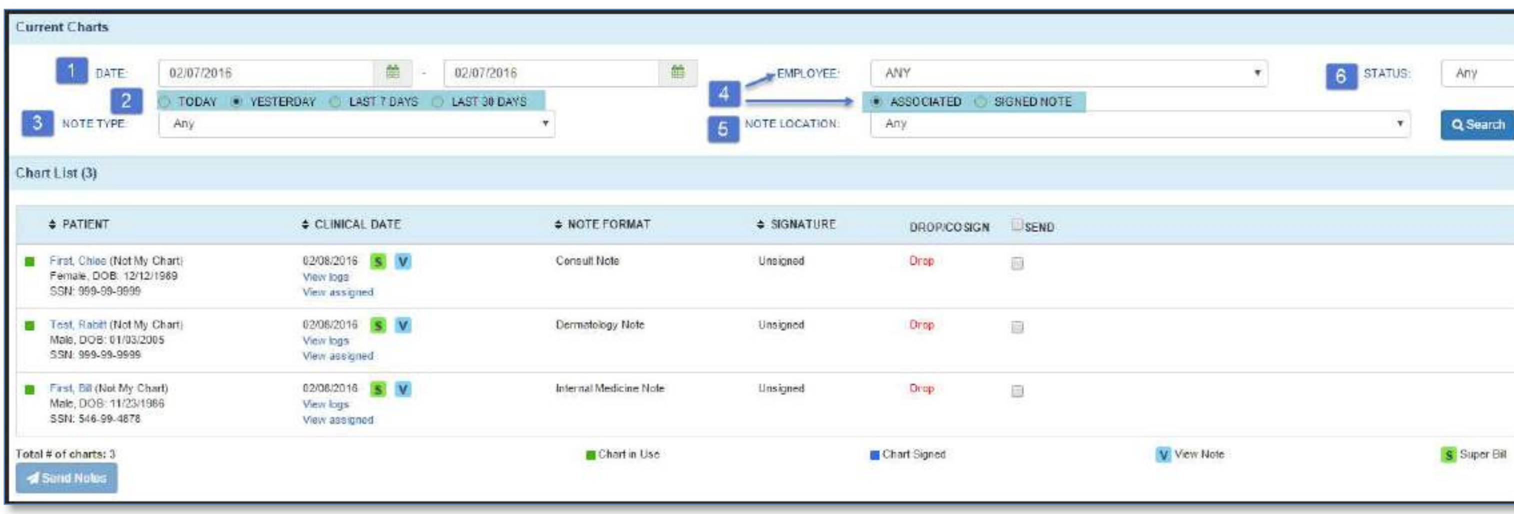
Date: 02/18/16

Re: Updates to the WRS Health System (cumulative)

WRS Health is proud to announce the release of new functionality over the past few weeks. It is our hope that you will find these items valuable in your current workflow. Below is an explanation of new items, including details on practice-enabled functionality and sign-up instructions for these powerful **"no cost"** features.

ENHANCED Filters Added to EMR>Current Charts

Functionality has been added to offer more comprehensive filtering of patient notes under **EMR>Current Charts**. These new filters allow the user to query their patient records based on a more complex combination of criteria. New filters include:



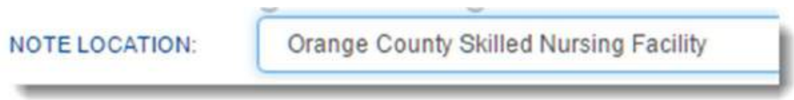
EMR>Current Charts>Filters

(1) Date Range – Enter a starting and ending date to view notes from a specific period of time.

(2) Time Period - Filter by a predefined block of time (**Today**, **Yesterday**, **Last 7 Days**, **Last 30 Days**).

(3) Note Type – Filter by **Note Type** (e.g. Brief Note, Visit Note) that was used during the encounter.

(4) Note Location – Filter by the **Location** where the note was signed.



(5) Employee – Filter by practice user (employee). You must opt to filter by all users **Associated** with the notes OR only users who have **Signed** the notes. *HINT: Any practice user who modifies a note in any way is then Associated with that note.*

(6) Status - Filter to see all **Signed** or **Unsigned Notes.**

NEW Practice-Customized Address Book

Functionality has been added to allow your practice to setup and store a customized list of contacts and practice locations. This data can then be used to **Send** documents from WRS via **Fax** or **Email**. (see details on *Email Signup* below).

Address Book Setup

Your practice-customized **Address Book** must be setup under **Admin>Practice Setup>Address Book**. Contact entries include: **Name**, **Email, Phone, Fax** and **Comments**.

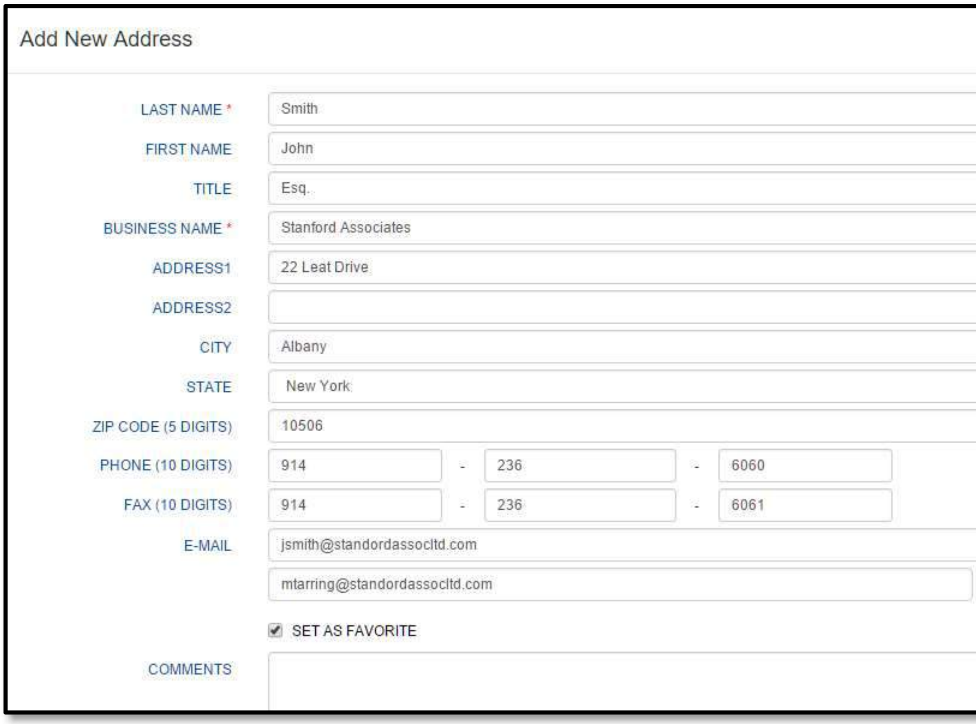
Administration>Practice Setup>Address Book

(1) **Search Address Book** – Enter **Contact Name** or **Fax** to search entries that were previously stored.

(2) **Favorites** – **Favorite Contacts** are designated by clicking the star icon. Icons shown as yellow stars are considered Favorites. These will always appear at the top of all **Address Book** contacts.

Administration>Practice Setup>Address Book>Favorites

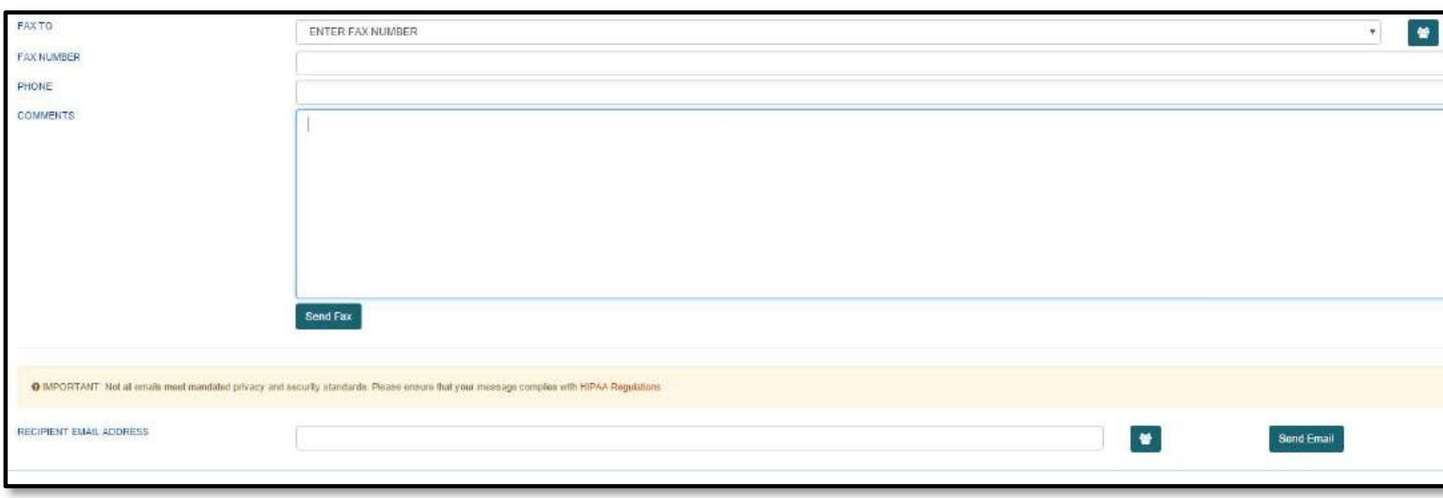
Add New Address – Use this button to add new contacts to the **Address Book.** Details can be entered for **Name, Title, Business, Address, Phone, Fax, Email** and **Comments.** Additional email addresses can be added for a contact by pressing the **Add Email** button. Press **Save** to make your entry part of your **Address Book.**



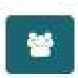
Administration>Practice Setup>Address Book>Add New Address

Address Book Usage

Once it is setup by your practice, the **Address Book** data can now be accessed from all dialogs in WRS that offer the transmission of faxes and/or emails.



Send Fax>Address Book Icon

Pressing the **Address Book Icon**  takes the user to **Address Book** page. Here the user can **Select** one or more Address Book entries as recipients of their fax or email.

Send Fax > Address Book>Select

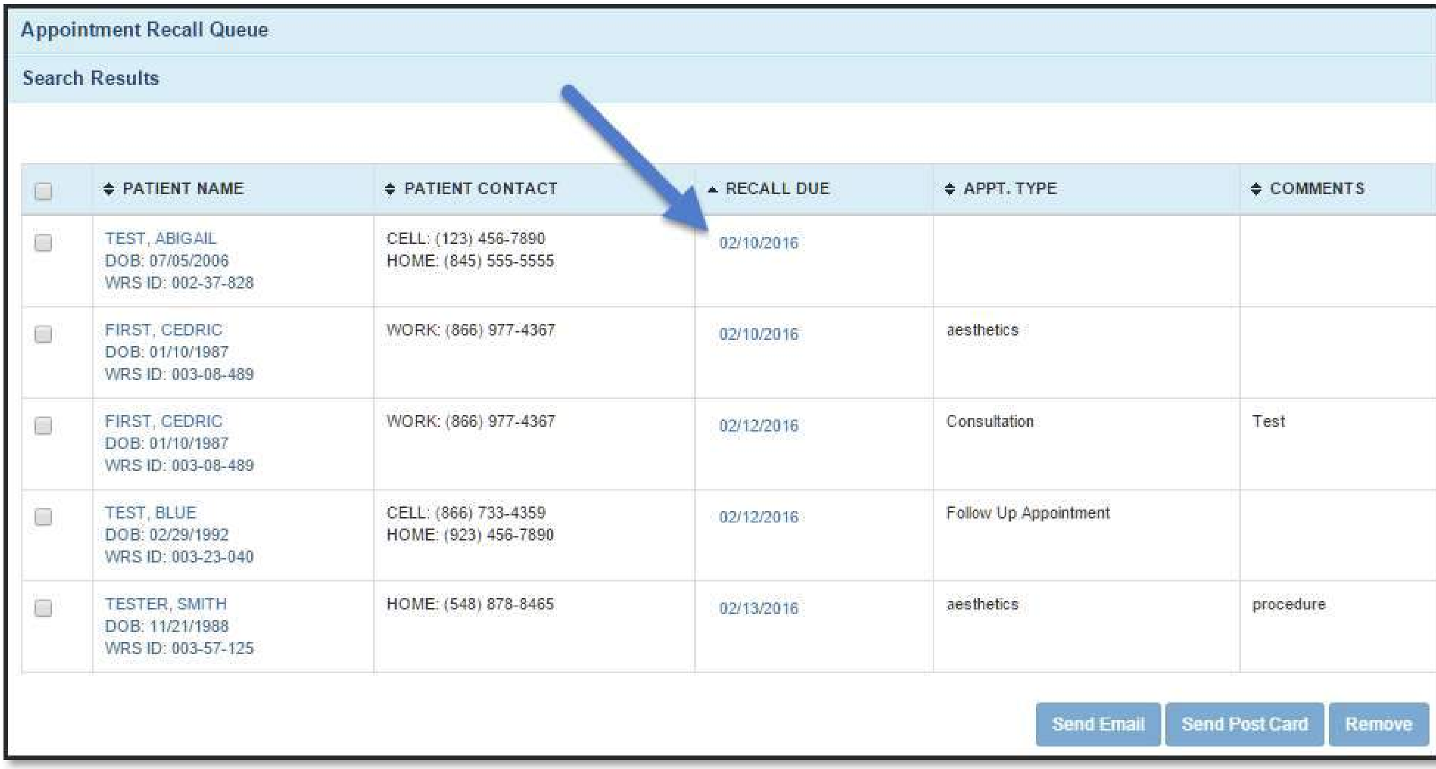
The practice **Address Book** is composed of two sections. **Contacts** or **Locations** can be selected in the upper right corner of the dialog box. **Practice Contacts** can be entered under **Administration>Practice Setup>Address Book** and **Practice Locations** is populated based on information taken from **Administration>Practice Setup>Practice Locations**.

Send Fax > Address Book>Contact/Location Toggle

Send Fax > Address Book>Contact/Location Toggle

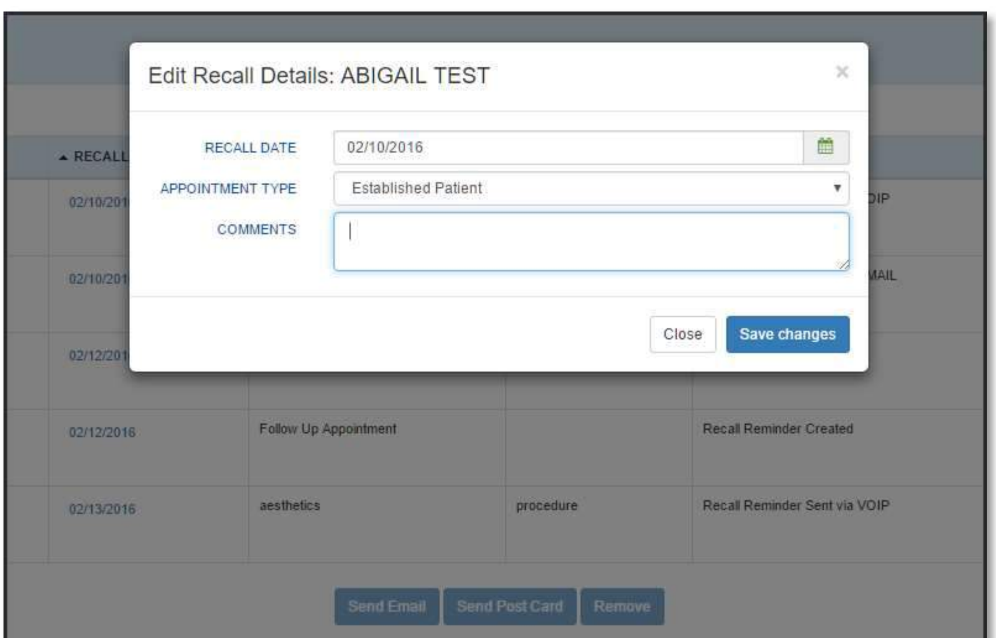
ENHANCED Edit Recall, & Recall Filters

Functionality has been added to give users the ability to edit an existing recall. This removes the need to delete, query and recreate a recall as required by previous workflow.



Scheduler>Patient Recall>Appointment Recall Queue>Results

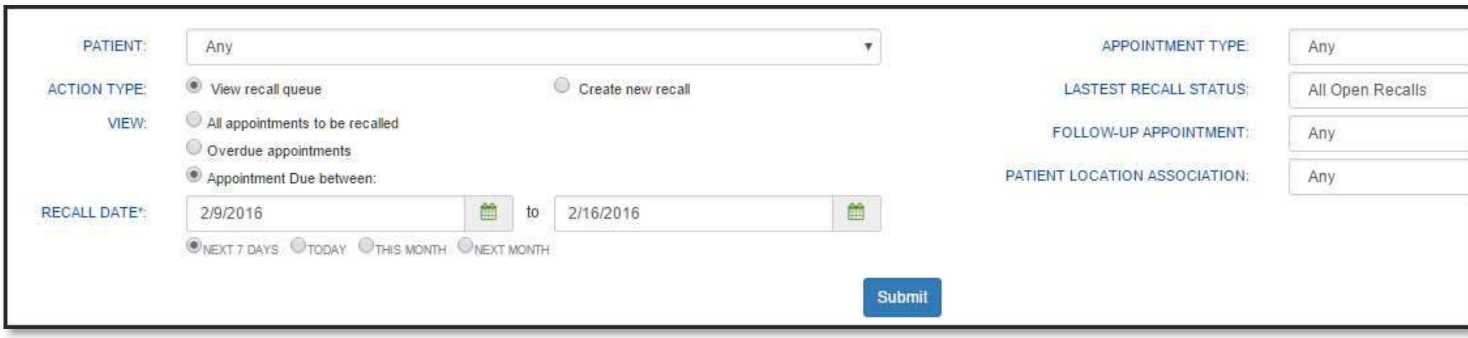
After you have performed a **Recall Query**, click on any date in the **Recall Due** column to edit that recall.



Scheduler>Patient Recall>Appointment Recall Queue>Results>Edit Recall

Recall Queue Search Filters

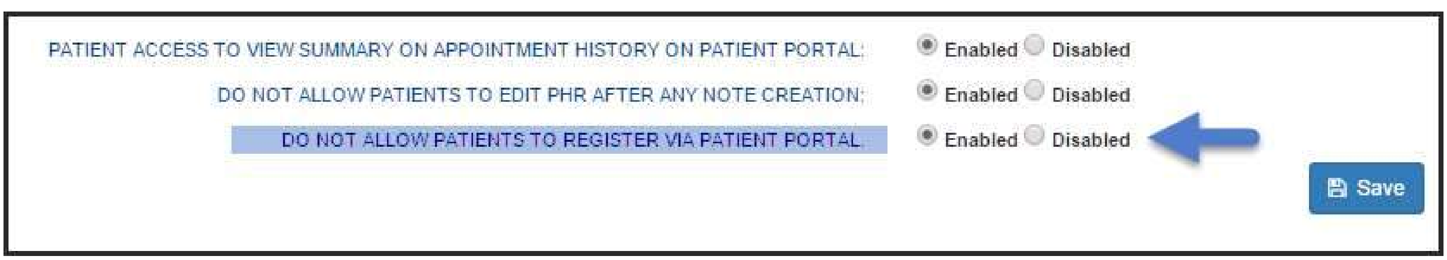
Under **Scheduler>Patient Recall>Appointment Recall Queue** several new filters have been added to allow more sophisticated searching. Added filtering tools include: **Appointment Type**, **Latest Recall Status** and **Patient Location Association**. These filters can be used to allow more detailed searching of past, present or future recalls.



Scheduler>Patient Recall>Recall Query

NEW Disable Patient Self-Registration on Portal

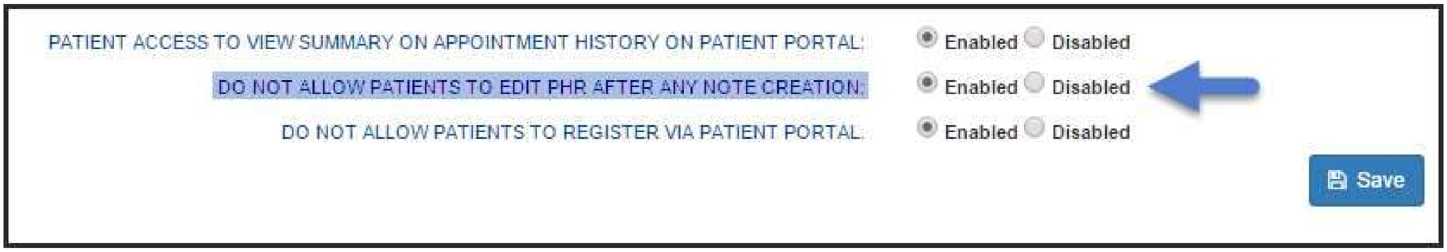
Functionality has been added so that your practice can choose to enable or disable self-registration for all patients from the practice portal website. This can be used if your practice wants more control over registration and wants to prevent patients from registering on their own. When this function is enabled, your portal will no longer have a "Register" link and your patients will not be able to access the existing registration pages:



Administration>System Settings>Do Not Allow Patients to Register Via Patient Portal

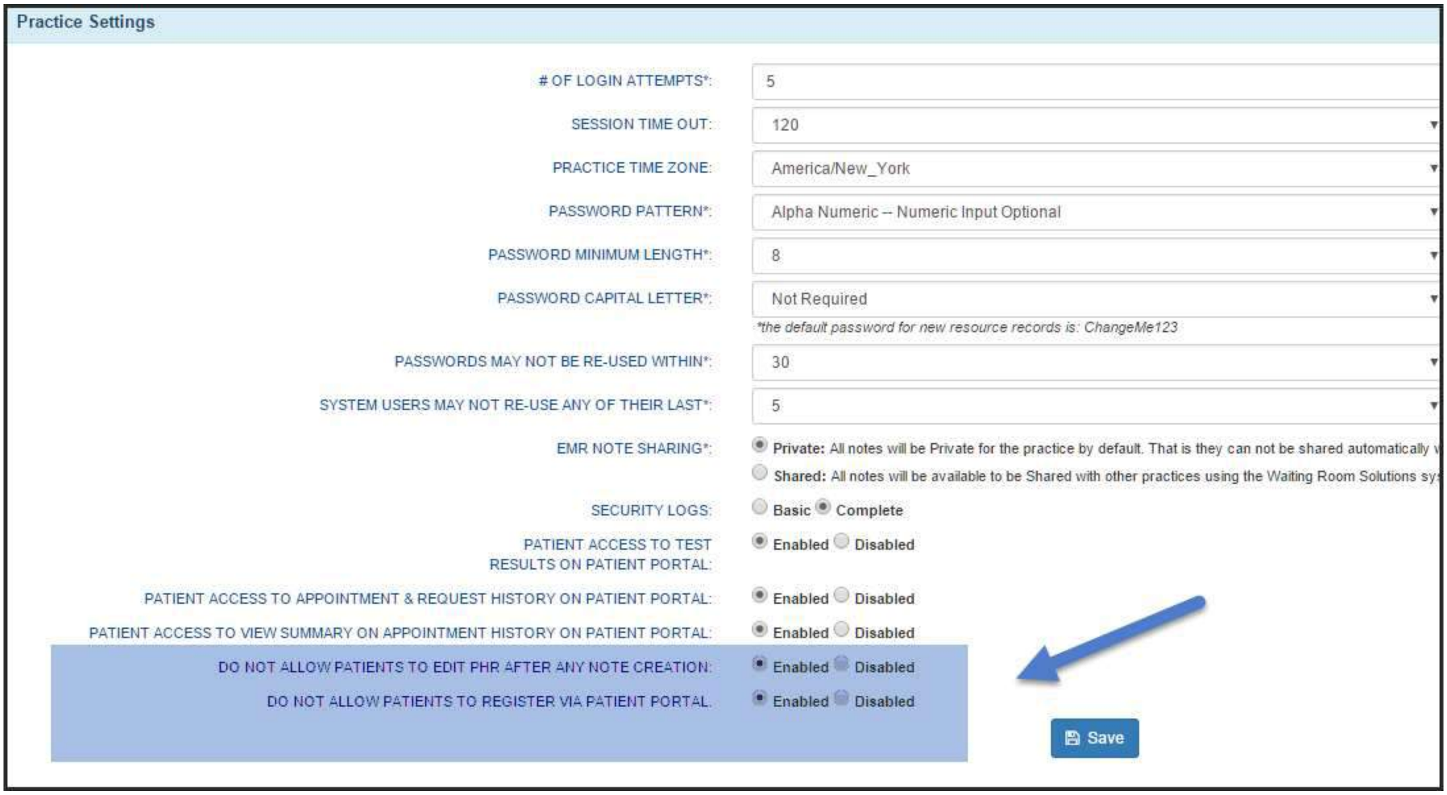
NEW Disable PHR Editing on Portal

An option has also been added to prevent patients from changing information on patient portal *after* any note has been created. Once a note is created, then patient's PHR becomes view only. This function can be used to allow new patient data entry, but prevent further modification *after* treatment begins.



Administration>System Settings>Do Not Allow Patients to Edit PHR After Any Note Creation

Each of these portal access functions can be accessed under **Administration>Practice Setup.** Note that changes to these settings become effective immediately for all patients in your practice.



Administration>System Settings>Patient Portal Options (new)

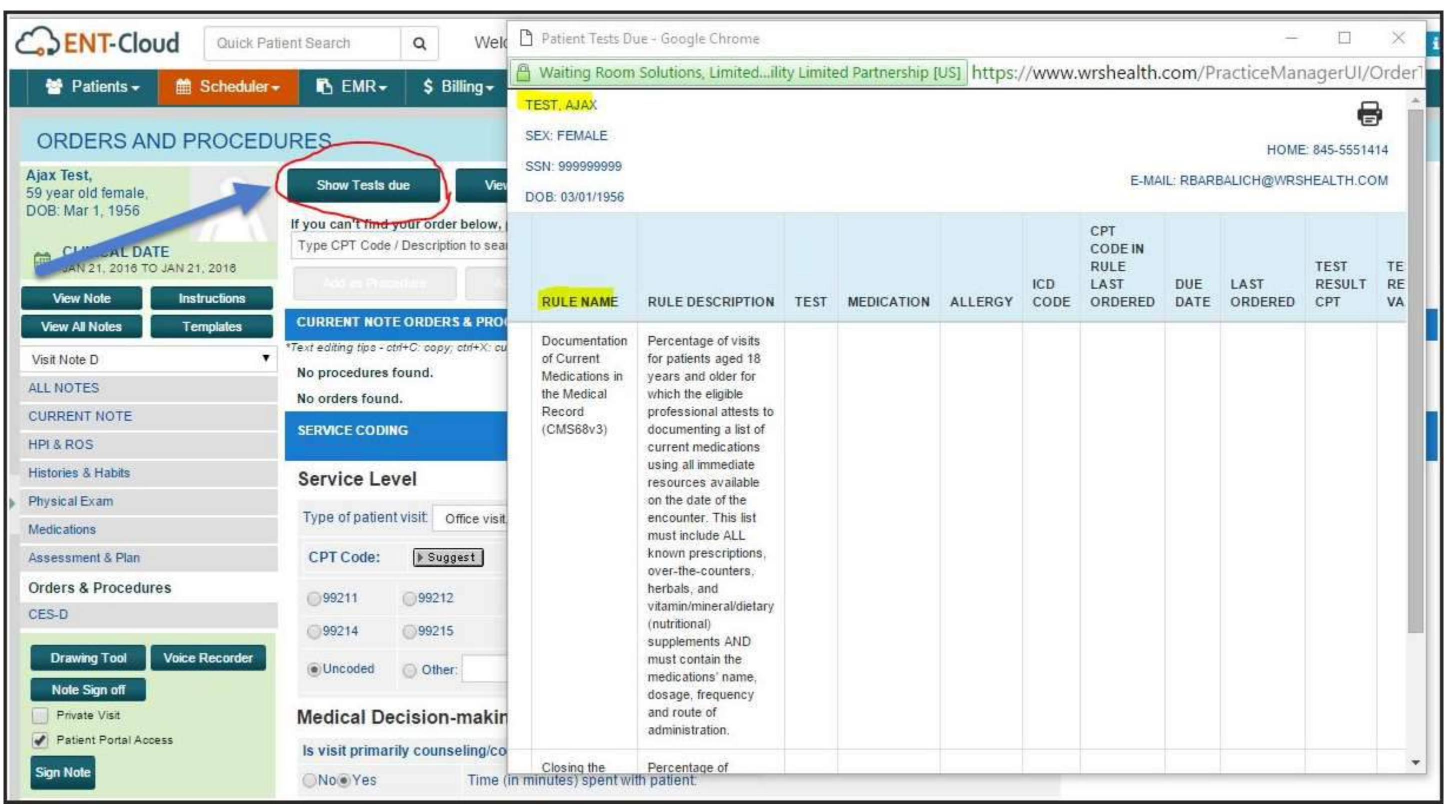
NEW Delete Patient Account Email

Functionality has been added that offers the ability to delete a patient's **Primary Account Email,** and remove that patient's ability to access the Patient Portal. This function is also used to delete an incorrect email once it has been added to a patient account.

Patient Management>Account Information>Current Email>Delete

DISABLED Health Maintenance Pop-up Move to Exam Room

WRS is aware of issues with the current **Health Maintenance Module** and is working, behind-the-scenes, to enhance this module, more effectively incorporating it into the workflow of practices. During this time, we have disabled the popup alert per patient triggered during the **Move to Exam** action. Alternately, users can access this information under **EMR>Orders>Show Tests Due** icon.

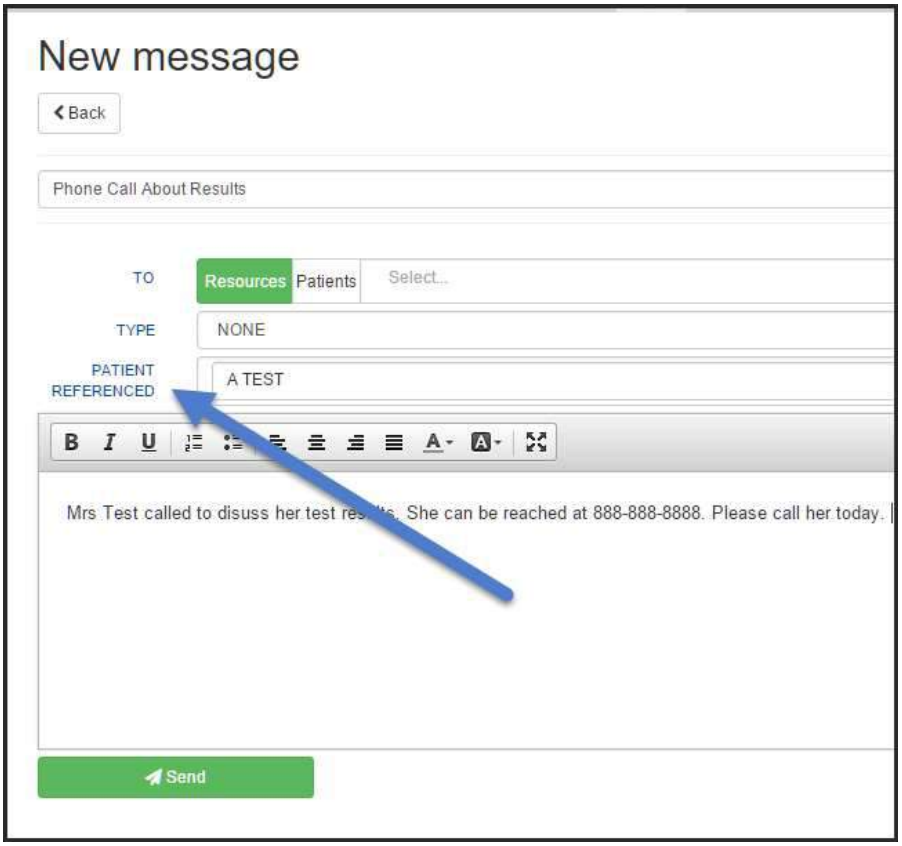


EMR>Orders & Procedures>Show Tests Due

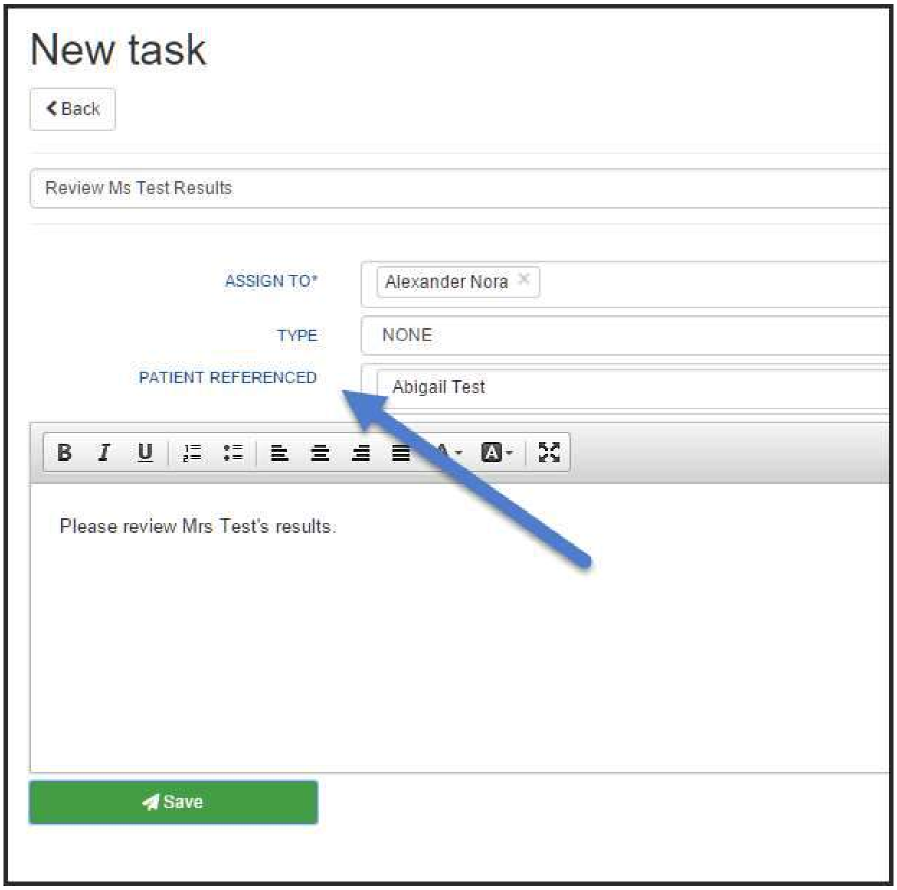
NEW Tasks & Messages Log under EMR All Notes

Functionality has been added to associate a Task or Message to a specific patient chart and display a list of all Tasks and Messages, related to that patient.

Note that the patient may, or may not, be the actual recipient of these messages. The patient name can be referenced by entering that patient name on the new **Patient Referenced** field that is now available on all Tasks and Messages.



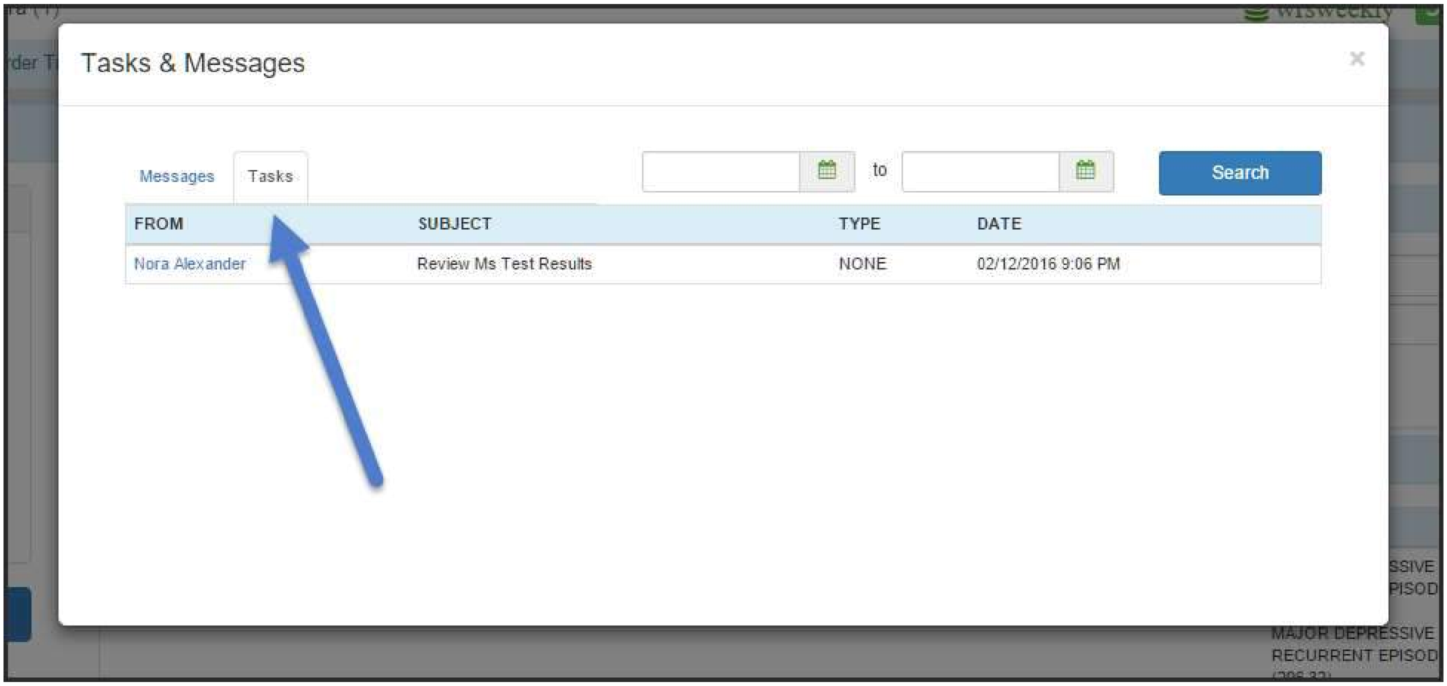
Messaging>New Message>Patient Referenced



Messaging>New Task>Patient Referenced

To view all Tasks or Messages for a given patient, go to **EMR All Notes**>**Tasks & Messages Log.** Clicking this button will open a new window that displays a tab that lists all messages and another tab that displays all Tasks sent to/from or related to that patient.

EMR>Tasks & Messages

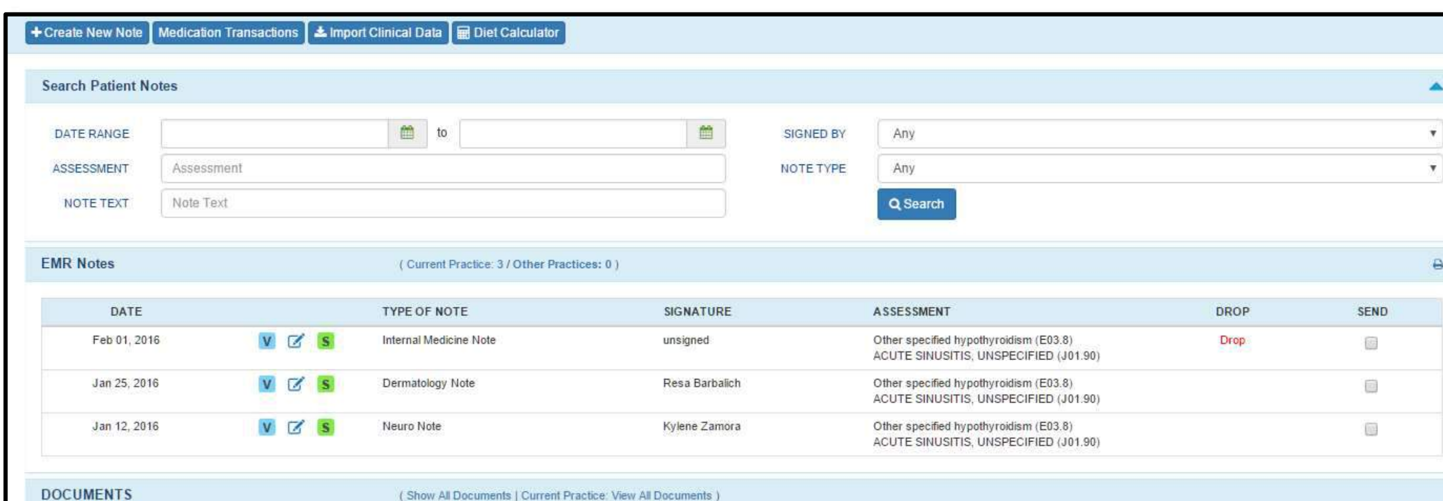


EMR>Tasks & Messages>Tasks & Messages Log

NEW Email Patient Notes (practice enabled, see below)

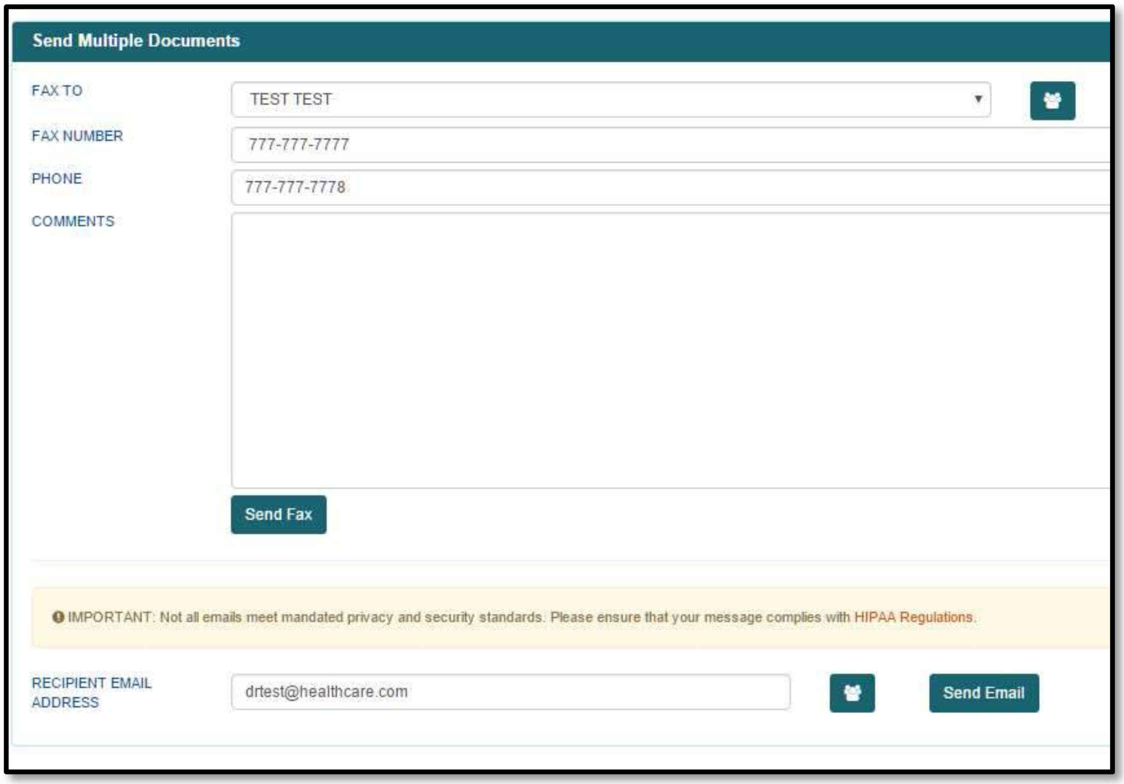
If your practice decides to have the new **Email Notes** function enabled, you will have the ability to email notes from **Current Charts** (multiple patients, above) and **EMR All Notes** (individual patients).

To send notes for a single patient go to **EMR>EMR All Notes**. Check the **Send** boxes**,** corresponding to the notes to be sent, and press **Send Select Documents.**

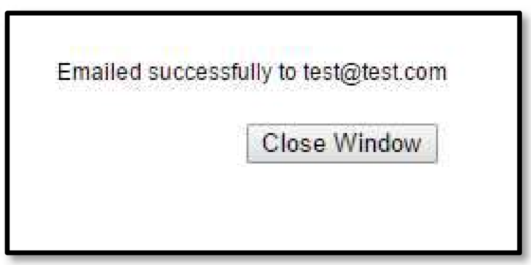


EMR>EMR All Notes>Send Multiple Documents

Manually enter a **Recipient Email Address** or select the **Address Book** icon to access the practice-maintained list of contacts. When adding multiple email recipients separate each with a semi-colon. Press **Send Email** to transmit the email with attached charts.



EMR All Notes>Send Multiple Documents>Recipient Email Address



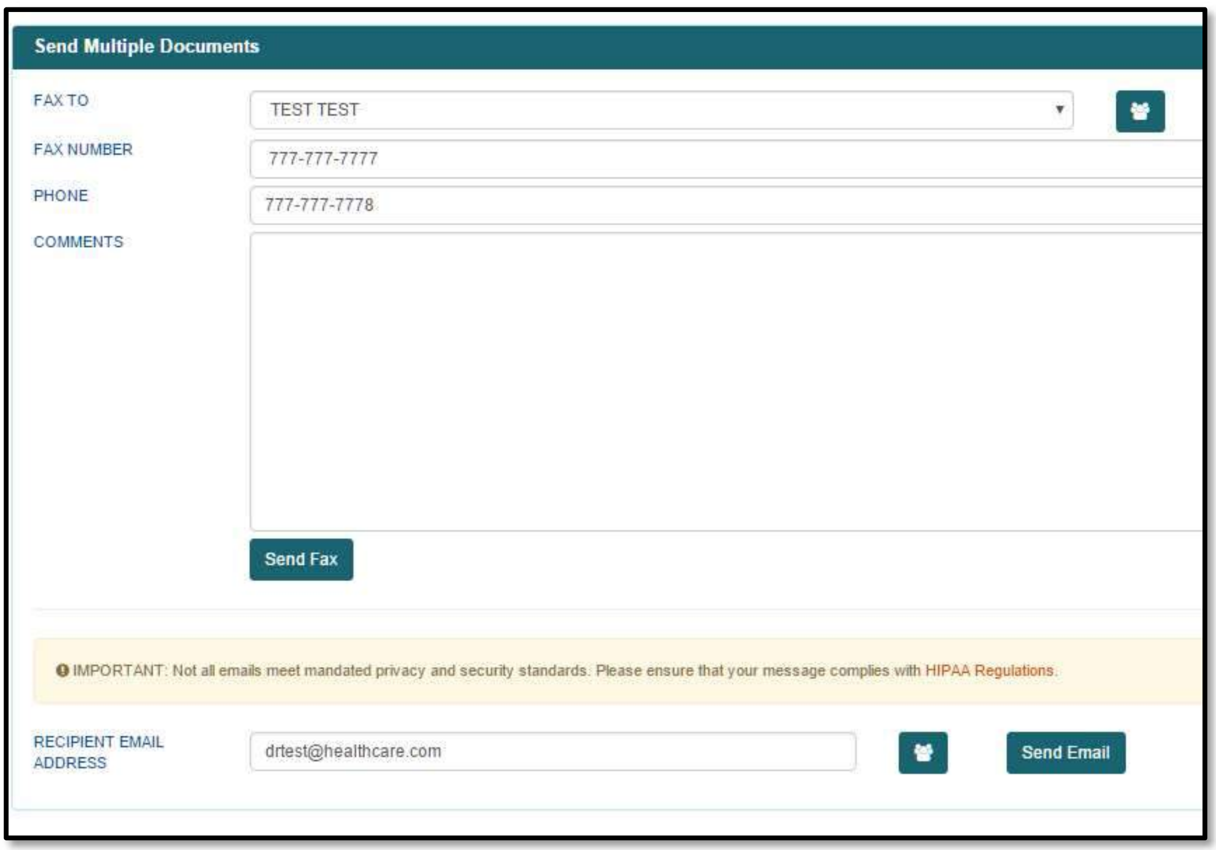
EMR All Notes>Send Multiple Documents>Recipient Emailed>

Confirmation of Email

Bulk Email of Notes

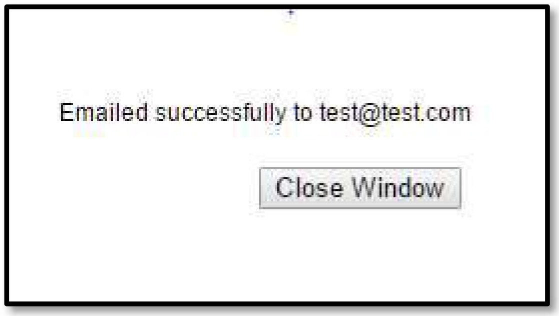
The ability to simultaneously fax or email (see below) multiple patient notes has been added to **EMR>Current Charts**. Once you have searched and found the appropriate patient charts, simply click the **Send** box for each line item or select the **Send** column heading to send all charts on that page. Pressing the **Send Documents** button will take you to the **Send Multiple Documents** dialog box.

EMR>Current Charts>Send Notes



EMR>Current Charts>Send>Send Note>Recipient Email Address

Manually enter a **Recipient Email Address** or select the **Address Book** icon to access a practice-maintained list of contacts. When adding multiple email recipients separate each with a semi-colon. Press **Send Email** to transmit the email with attached charts.



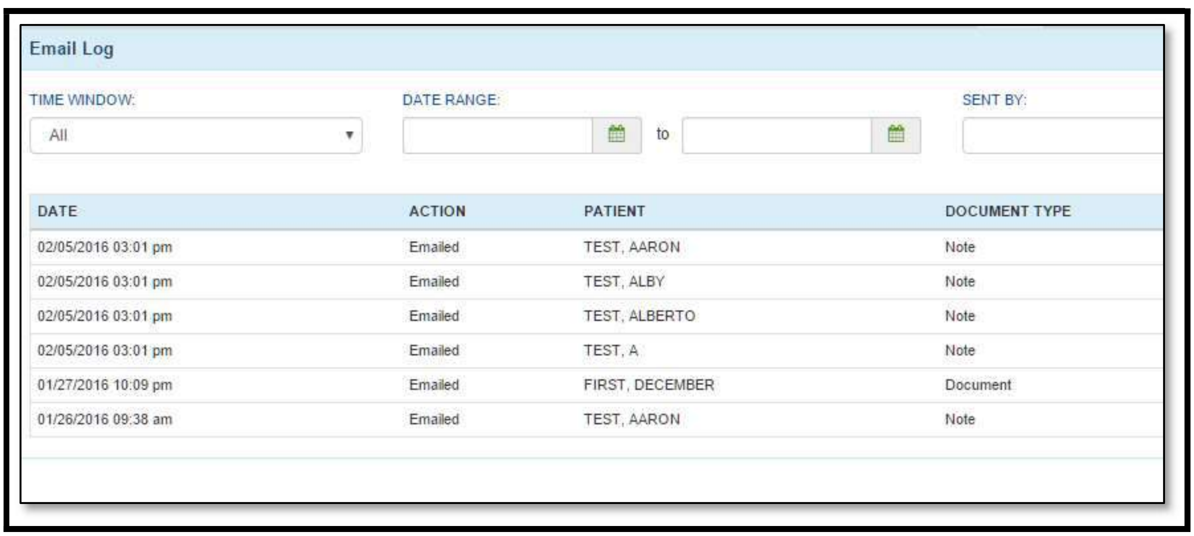
EMR>Current Charts>Send Notes>Recipient Emailed>

Confirmation of Email

A confirmation message will appear upon successful transmission of the email.

Email Log

All emails transmitted by the practice are listed under Document Management>Email Log. The **Date**, **Action, Patient**, **Document Type, Email, User** and **Result** are displayed in a set of sortable columns. The log can be filtered by **Time Window**, **Date Range**, **User** and **Status:**



Documents>Email Log

Practice Enabled Features – Signup Form
February 18, 2016

WRS Health has added several new functions that are enabled at the practice-level. Activating these features requires the signed authorization from the practice owner/administrator. Note that there is **no additional cost** for the use of these new features.

Please select the features you wish to enable in your practice. Then, sign and return this page only via email: **SystemUpdates@wrshealth.com** or fax: **(845) 531-4812**

1	**ABILITY TO EMAIL CLINICAL NOTES**
Check to enable	**Functional Description:** Ability to email notes and documents directly from the EMR (see above). *This feature should be enabled with caution. Note that not all email is HIPAA compliant. It is the responsibility of practice ownership/management to determine how the email functional will be used, while avoiding any potential privacy or security issues.*

2	**QUICK PATIENT REGISTRATION**
Check to enable	**Functional Description**: Removal of mandatory requirements for Address, Phone and Gender when creating a new patient. *This feature should be enabled with caution. Missing demographics can cause eligibility checking issues and delays in processing claims*.

3	**ENHANCED PATIENT DATA PRIVACY SETTINGS**
Check to enable	**Functional Description:** With this feature enabled, your patient demographics are no longer be shared with other WRS practices. *In turn, your practice will no longer have access to demographics shared by other WRS practices.*

Provider/Owner Signature (required for enabling the above features)		
I authorize WRS Health to enable the optional system features selected above.		
Practice Name	**Name (print)**	**Title**
Signature		**Date**