



To: All WRS Users  
From: WRS Development Team  
Date: 02/24/12  
Re: System Update to Waiting Room Solutions

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The WRS Development Team will be performing a software update to the Waiting Room Solutions System on or about February 24, 2012. This release will include the following:

### Scheduler Display Preferences

Functionality has been added to allow users to set default **Scheduler Display Preferences**. This option is found under **My Preferences>Scheduler Display Preferences**. Please note that **My Preferences** are user-specific and the steps below should be repeated for each practice user, as needed:

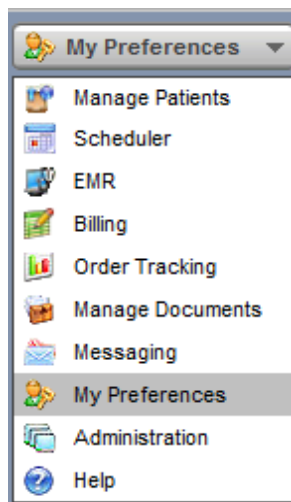


Figure 1: Main Menu>My Preferences

Users can now select a default landing page for the **Scheduler Module**. These include **Scheduler View** (individual resource view) , **Multi-Resource View** (displays multiple resources within in one view), and **Last Visited** (remembers last visited page, former default):

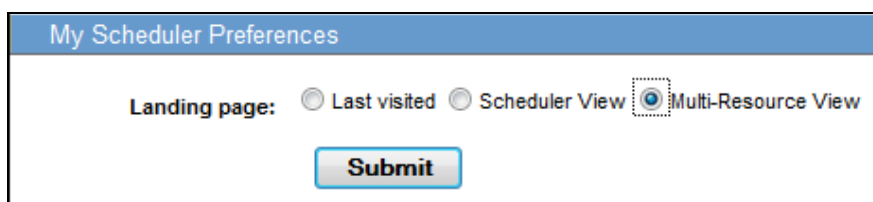


Figure 2: My Preferences>Scheduler Display>Multi Resource View

In order to use the **Multi-Resource View** the user must set their **Select Resources Filter** under **Scheduler>Multi-Resource View**:

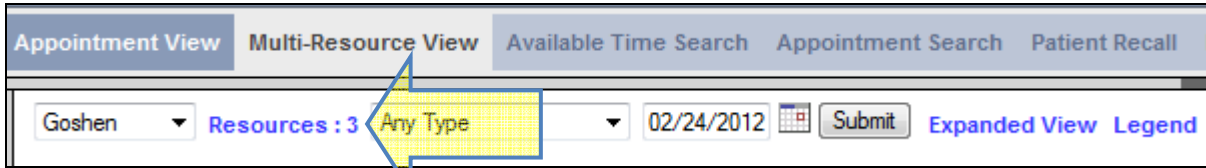


Figure 3: Scheduler>Multi Resource View>Set Filter> Resources

Pressing **Resources: 0** will open the **Select Resources Filter** dialog. This will display all current **Practice Resources** (providers) and **Non-Human Resources** (labs, etc.). The user would then select all **Resources** to be displayed and press **OK**:

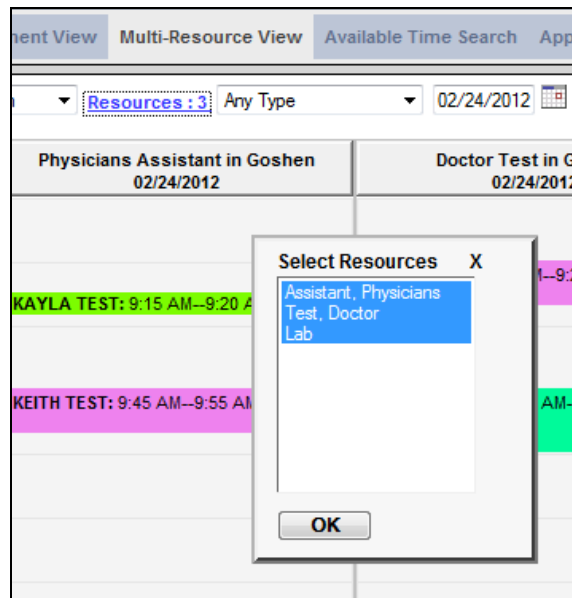


Figure 4: Scheduler>Multi-Resource View>Select Resources

Once the **Select Resources Filter** is set, the Program will retain these settings when the user returns to the **Multi-Resource View**:

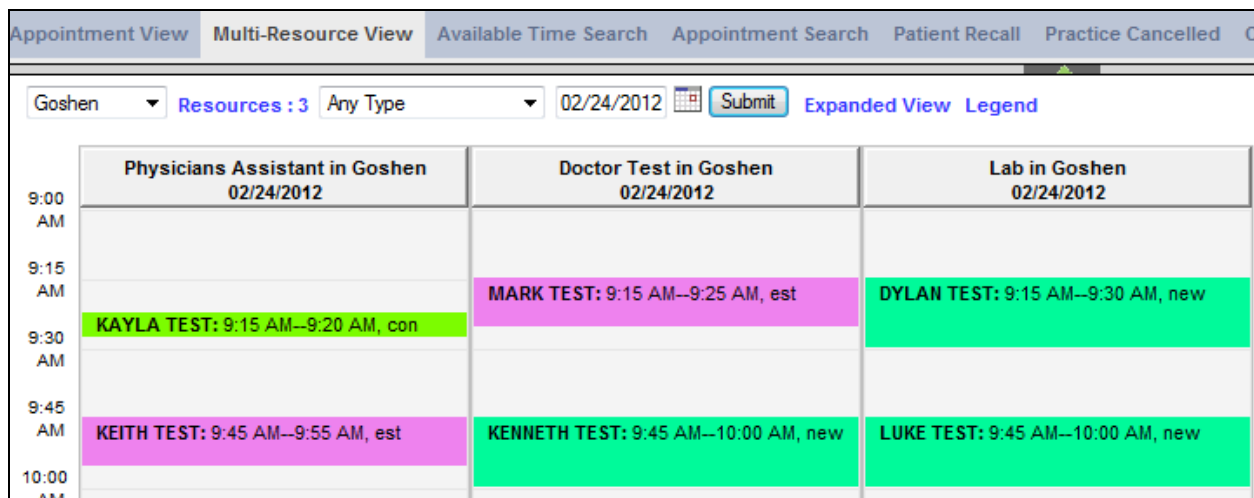


Figure 5: Scheduler>Multi-Resource View

Under **My Preferences>Scheduler Display Preferences** the user can also set their default **Today's Appointment List Filter**:

Today's Appointment List Filter

Patient: Any

Location: Goshen

Resource: Any

Appointment Type: Any Type

Workflow Status: Any

Active Status: Active

Time Window: All Day

Group By: Resource

Submit

Figure 6: My Preferences>Scheduler Display> Today's Appointment Filter

Once the **Today's Appointment Filter** has been set, the **Today's Appt List** will retain these selections for the user:

Welcome, Nora (0)

Lock Screen Sign Out

Today's Appt List

Time	Name
Doctor Test	
9:15 am est <sup>1</sup>	TEST,M
9:45 am new <sup>1</sup>	TEST,K
Physicians Assistant	
9:15 am con <sup>1</sup>	TEST,K
9:45 am est <sup>1</sup>	TEST,K
Lab	
9:15 am new <sup>1</sup>	TEST,D
9:45 am new <sup>1</sup>	TEST,L

Figure 7: Today's Appointment Window

### Reminder Call Details

Functionality has been added to display the **Date** and **Status** of **Automated Patient Reminder Calls**. This information can be accessed by clicking on any **Patient Appointment** and selecting **View Appointment Details**:

Appointment with Dr JohnTest at ENT SPECIALTY CARE

Patient: Kenneth Test

Appointment Time: (mm/dd/yyyy hh:mm)

From: 01/05/2011 9:45 AM

To: 01/05/2011 10:00 AM

Appointment Type: Established Patient

Scheduled on: 12/22/2011 by Nicole Marshall

Reminder call on: 01/04/2012 ANSWERED

Notes: to review audio at Inspire

Cancel Reason:

Send email notification

Save Cancel Appt Reschedule Print

Figure 8: Scheduler >Appointment Details> Reminder Call

The **Reminder Call Date** and **Status** can also be accessed using the **Scheduler>Appointment Search** and clicking the **History “H”** icon:

Appointment Search

Search Results

Change Search Criteria

Active Appointments Canceled Appointments

Printable View with Gap indication

Appointment Time	Patient Info	Resource	Location	Appointment Type	Notes	History
Thu, 01/05/2012 9:45 AM--10:00 AM	Michael Test DOB: 10/23/1968 CELL: 845-555-5555 WRS ID: 123456789		Dr. John Test ENT SPECIALTY CARE	Established Patient	to review audio at Inspire	H

Scheduled on: 12/22/2011 10:40:07 AM by Nicole Marshall  
Reminder call on: 01/04/2012 04:40:00 PM ANSWERED

Figure 9: Appointment Search >Appointment Details> History>Reminder Call

Please note that **Automated Patient Reminder Calls** must be enabled by the practice under **Administration>Scheduler Setup>Reminder and Recall Setup**. The one-time activation of this service must be completed by the practice in order for calls to be generated and for **Reminder Call Date** and **Status** information to be displayed.

## Order Tracking – Expected Date of Completion (Click to View Video Release Note 1)

Functionality has been added to record the **Expected Date of Completion** for any ordered test. Under **Orders and Procedures>Ordered Test** right click on the entry and select **Add Expected DOC**:

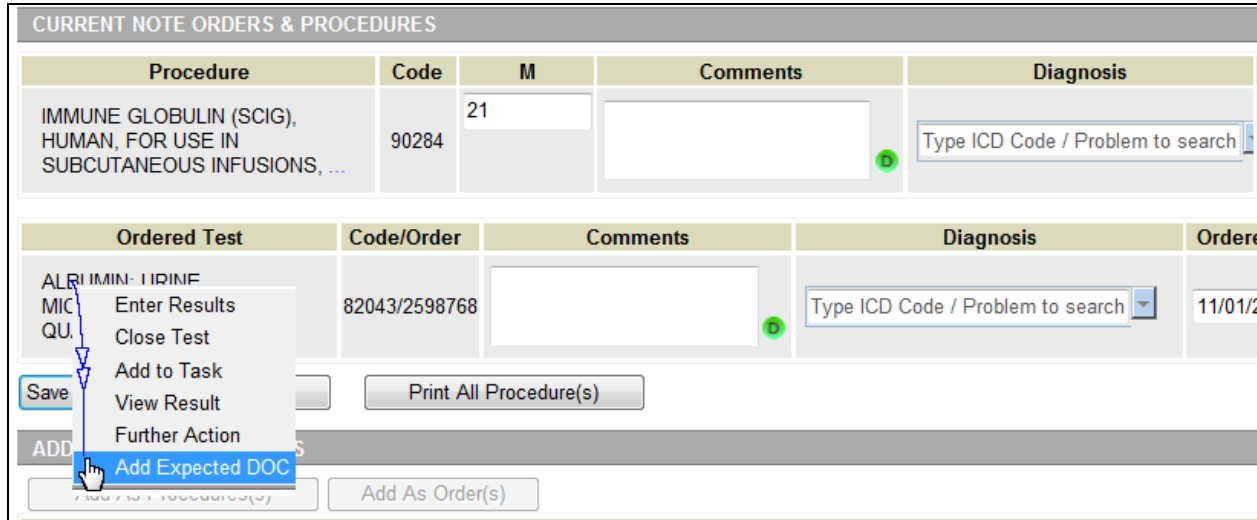


Figure 10: Orders & Procedures>Ordered Test>Add Expected DOC

Then, enter details for the **Expected Date of Completion** for the **Ordered Test**:

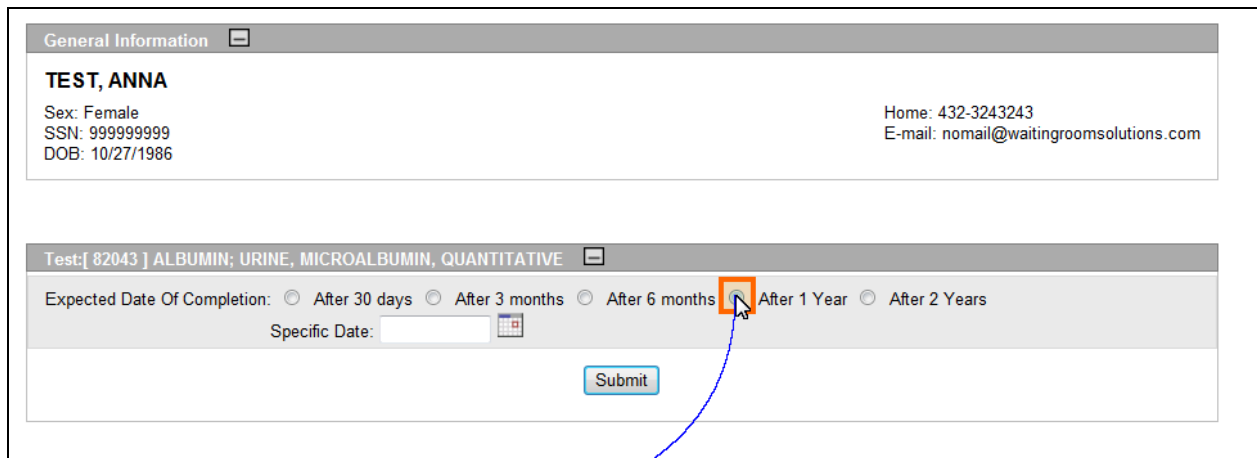


Figure 11: Orders & Procedures>Ordered Test>Add Expected DOC>Details

Once this step is completed, the **Expected Date of Completion** will be shown in the **Order History**:

CURRENT NOTE ORDERS & PROCEDURES							
Procedure	Code	M	Comments	Diagnosis	Ordered on	Action	
IMMUNE GLOBULIN (SCIG), HUMAN, FOR USE IN SUBCUTANEOUS INFUSIONS, ...	90284	21		Type ICD Code / Problem to search	10/04/2011		

Ordered Test	Code/Order	Comments	Diagnosis	Ordered on	Action	
ALBUMIN; URINE, MICROALBUMIN, QUANTITATIVE	82043/2598768		Type ICD Code / Problem to search	11/01/2011		

ADD ORDERS/PROCEDURES

Figure 12: Orders & Procedures>Ordered Test>History

MESSAGES		
No messages.		

Status History		
Test Name: 82043:ALBUMIN; URINE, MICROALBUMIN, QUANTITATIVE		
Expected Date Of Completion: 11/01/2012 Requisition: <a href="#">View</a>		
Date	Status	Comments
11/01/2011 11:17:40	Integrative Health Clinic ordered this test on 11/01/2011.	

Figure 13: Orders & Procedures>Ordered Test>History>Status History

The **Expected Date of Completion** can also be entered under **Order Tracking > Pending Results**:

Order Tracking											
Order Search											
Ordered Tests with Pending Results											
Patient Name	Test	Code	Order Comments	Ordered by	Ordered On	Expected On	View Notes	Order History	Print	Delete	
TEST, NICOLE	THYROID STIMULATING HORMONE (TSH)	84443		Cassandra Lamboy	02/21/2012	02/21/2013					
TEST, CASS	BLOOD COUNT, COMPLETE (CBC)	85025		Cassandra Lamboy	02/22/2012	-----					

<ul style="list-style-type: none"> <li>Enter Results</li> <li>Upload Reports</li> <li>Close Test</li> <li>Add to Task</li> <li>View/Add Diagnosis</li> <li>Further Action</li> <li><b>Add Expected DOC</b></li> </ul>
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Figure 14: Order Tracking>Ordered Tests with Pending Results>Add Expected DOC

The **Expected Date of Completion** is displayed under **Ordered Tests with Pending Results** under the **Expected On** column:

Order Tracking											
Order Search											
Ordered Tests with Pending Results											
Patient Name	Test	Code	Order Comments	Ordered by	Ordered On	Expected On	View Notes	Order History	Print	Delete	
TEST, NICOLE	THYROID STIMULATING HORMONE (TSH)	84443		Cassandra Lamboy	02/21/2012	02/21/2013	V A	H	Print	Delete	
TEST, CASS	BLOOD COUNT; COMPLETE (CBC), AUTOMATED (	85025		Cassandra Lamboy	02/22/2012	02/22/2013	V A	H	Print	Delete	
Completed Tests											
Tests Requiring Action											
Closed Tests											

Figure 15: Order Tracking>Ordered Tests with Pending Results

### Sending an OTS Patient Alert Message with the Expected Completion Date

An **OTS Alert Message** will be sent to the patient if the test is not completed by the **Expected Date of Completion**. Please note that message is only sent if this **Alert** has been enabled by the practice under **Administration>Order Tracking Setup> Edit Messages>Enable Alert**.

Patient performed test

Subject:

Message Body:

Enable Alert

Alert Period for sending the original message first time:  month(s)

Alert Period for sending the original message again as no reponse received for the earlier one:  week(s)

Figure 16: Administration>Order Tracking Setup> Edit Messages

### Various Other Enhancements & Adjustments

Several enhancements and adjustments have been made to overall system functionality. These include, but are not limited to, the following items:

- **Total Number of Claims** has been added to the **Clearinghouse Report**
- **ENT V Note Format** has been added