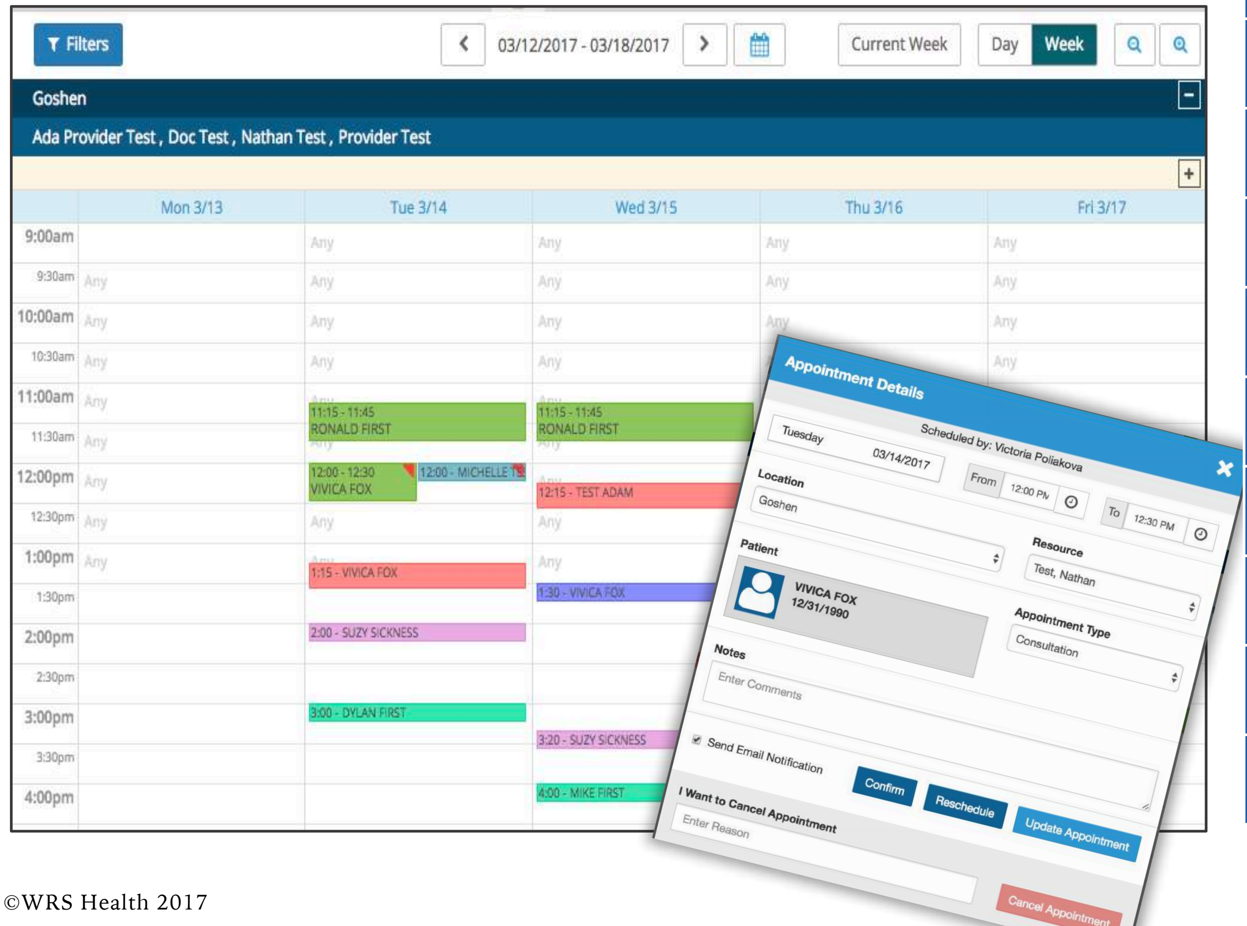
To: All WRS Users
From: WRS Development Team
Date: 04/10/2017
Re: Software Release



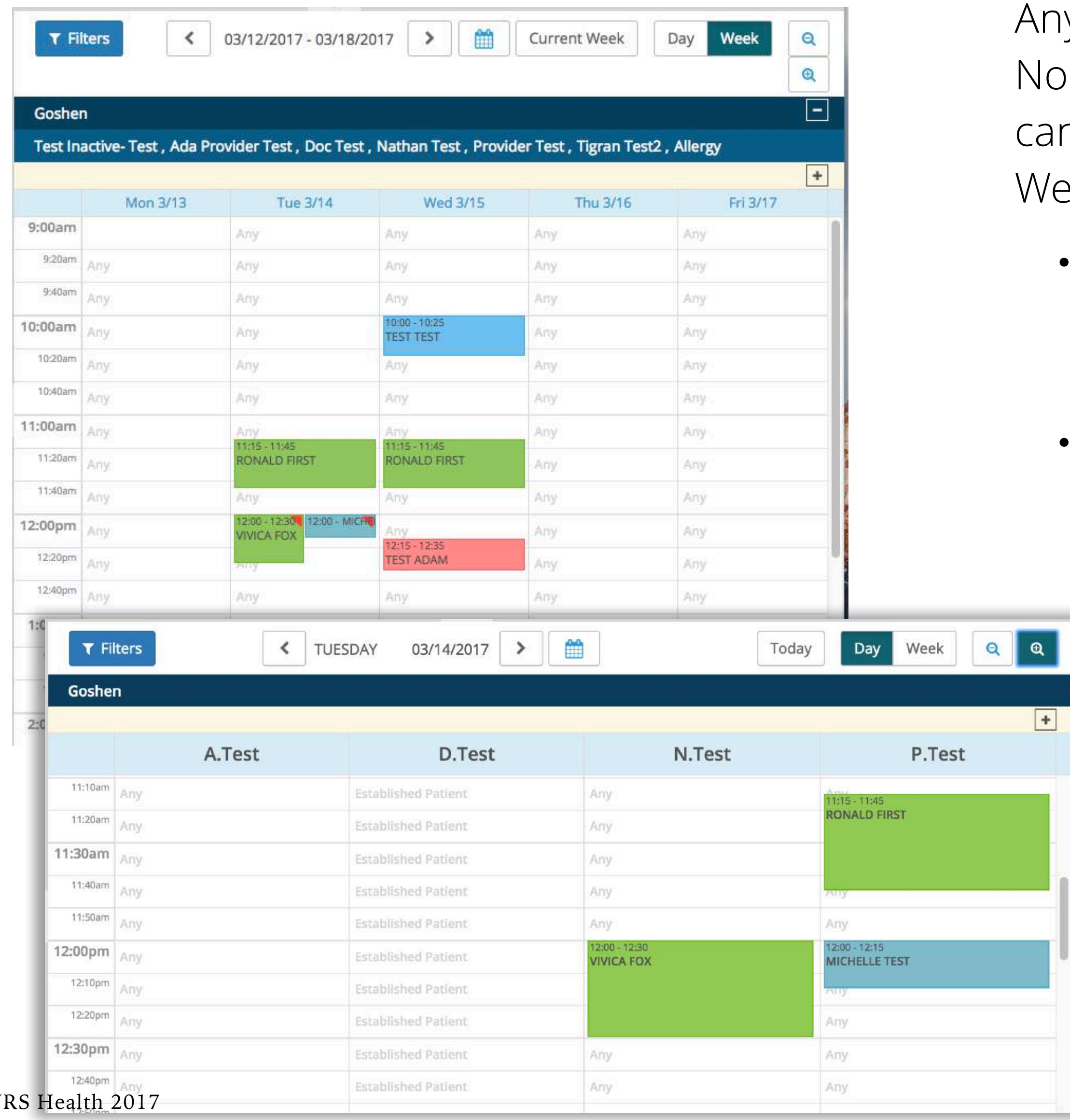
Scheduler Enhancements

- Multi-Provider Views
- Drag n' Drop Appointments
- Zoom In & Out
- Calendar Icon
- Easy Rescheduling
- Redesigned Dialog Boxes
- Smart Filters
- Appointment Pop-up
- Easy Access
- Improved Visibility
- Practice Setup Changes

View Release Notes Video

OPTIMIZED WORKFLOW

Multi-Provider Daily & Weekly Views



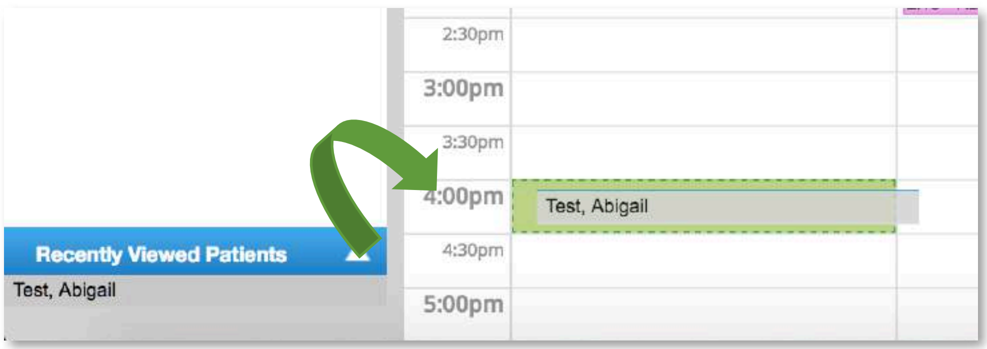
Any combination of Provider and Non-Human Resource schedules can be viewed in the Daily and Weekly Views.

- Schedules can be filtered by Appointment Type and Practice Location.
- Possible Appointment Types are listed within each available appointment slot.

Workflow:

1. Toggle between views using the Day, Week, and Current Week/Today buttons in the Header Bar
2. Open and collapse your options by clicking on **Filters**. Select your desired criteria.

Drag n' Drop Appointments

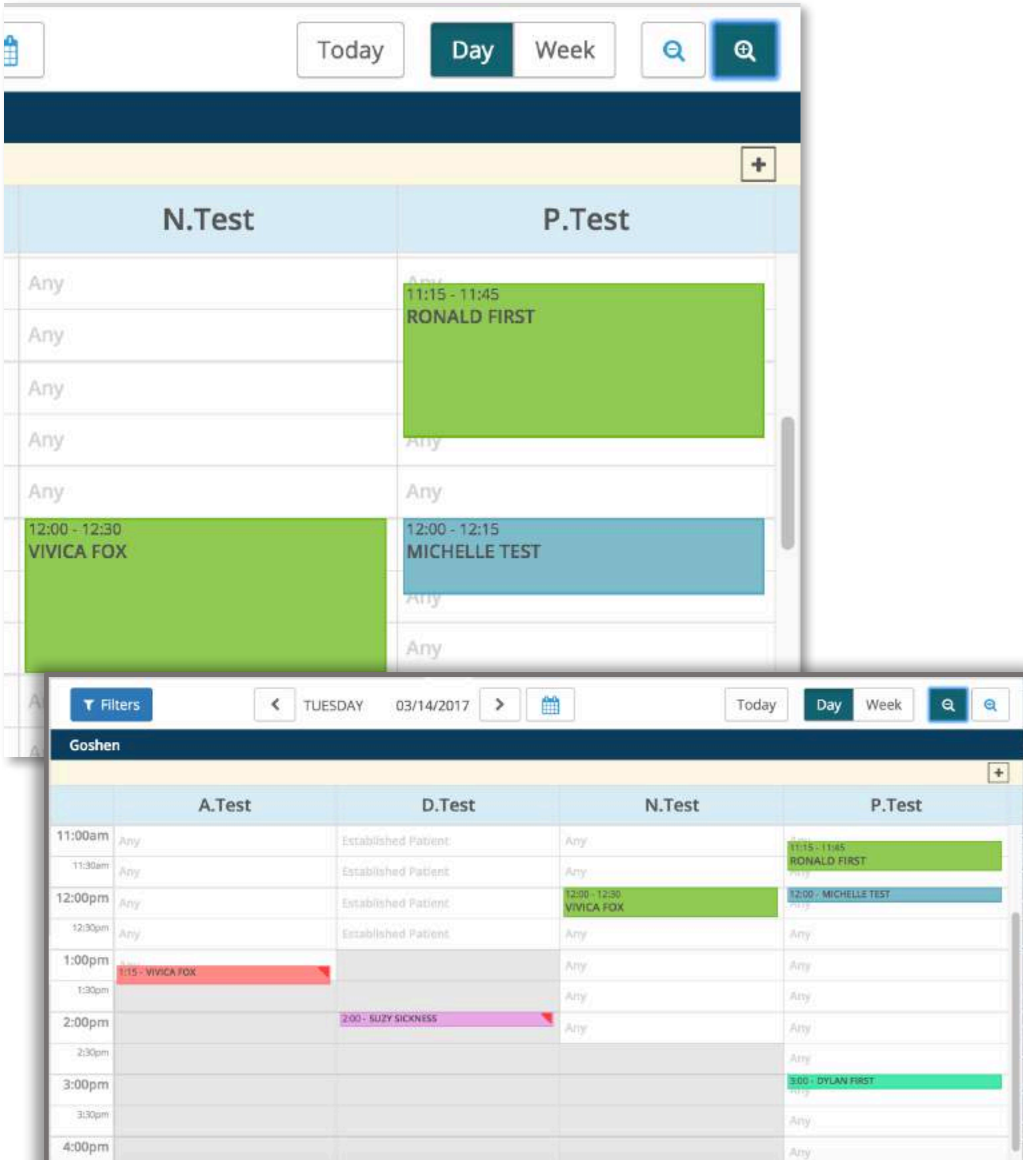


Patient names can be dragged from Recently Viewed Patients and Today's Appointments into the Scheduler. Appointments can be dragged and dropped between slots in any Scheduler View.

Workflow:

1. Click on a recently viewed patient
2. Drag the patient name onto the scheduler
3. Drop it into the preferred time slot

Zoom In & Out



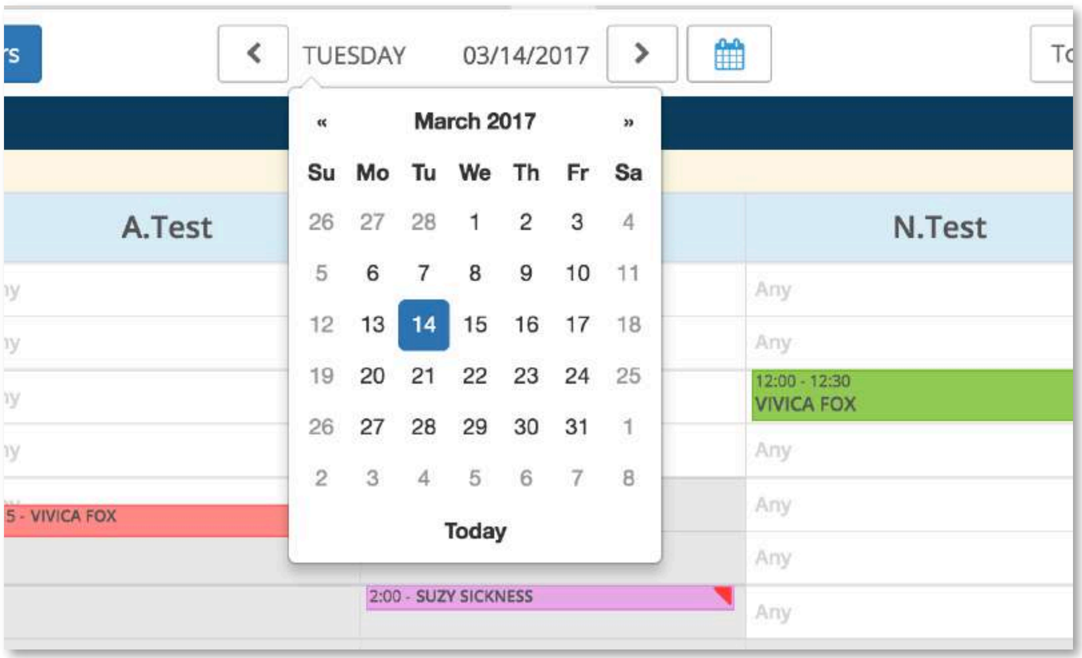
New Zoom In and Zoom Out buttons have been added to all scheduler windows.

Pressing these easy-access buttons makes your view temporarily larger or smaller.

Workflow:

1. To make your view larger, select the magnifying glass with the plus sign
2. To make your view smaller, select the magnifying glass with the minus sign

Calendar Icon

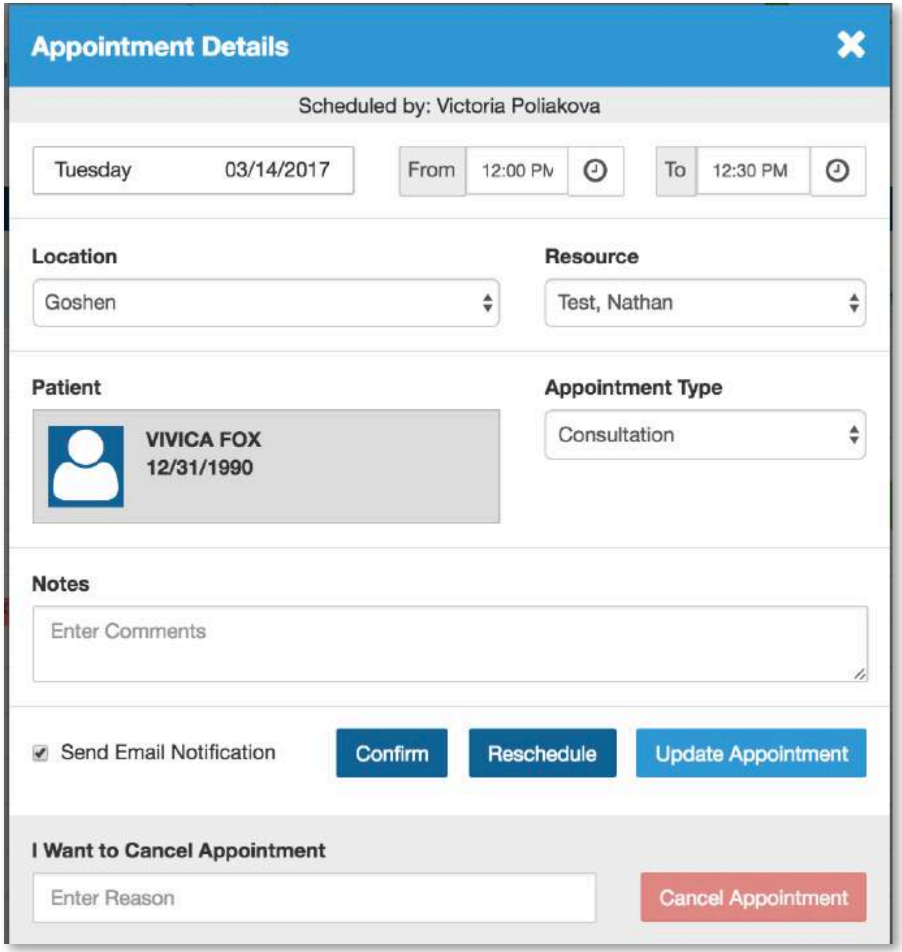


The new Calendar Icon has been added to all scheduler windows. Pressing this icon makes it easy to quickly navigate to an upcoming month or day.

Workflow:

1. Click on the **Calendar Icon** in the header to view the calendar

Easy Rescheduling

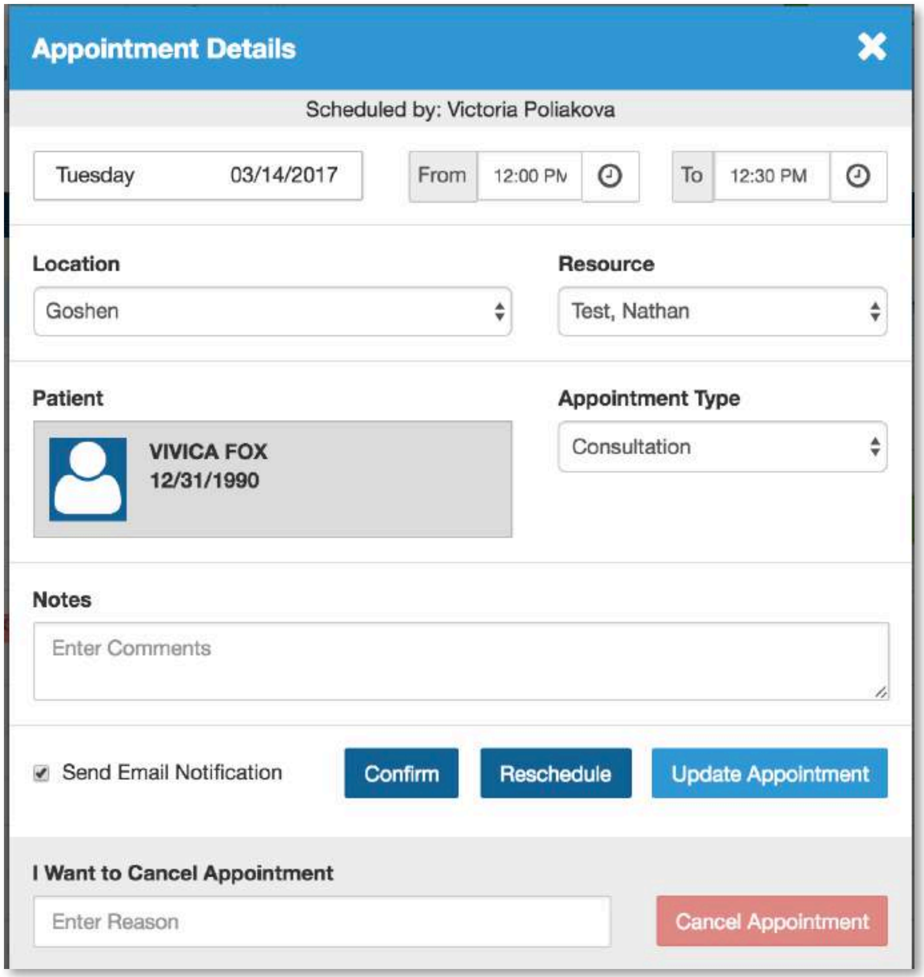


A new Reschedule Appointment function has been added. This allows rescheduling of an appointment in a single process.

Workflow:

1. Click on an appointment within the scheduler; a pop-up box will appear.
2. Select **Reschedule**
3. Within the schedule, select a new appointment time and date
4. Make any other changes in the pop-up box and select **Reschedule Appointment**

Redesigned Dialog Boxes



Essential dialogs have been designed to accommodate your workflow needs and allow for easy access to commonly needed functions

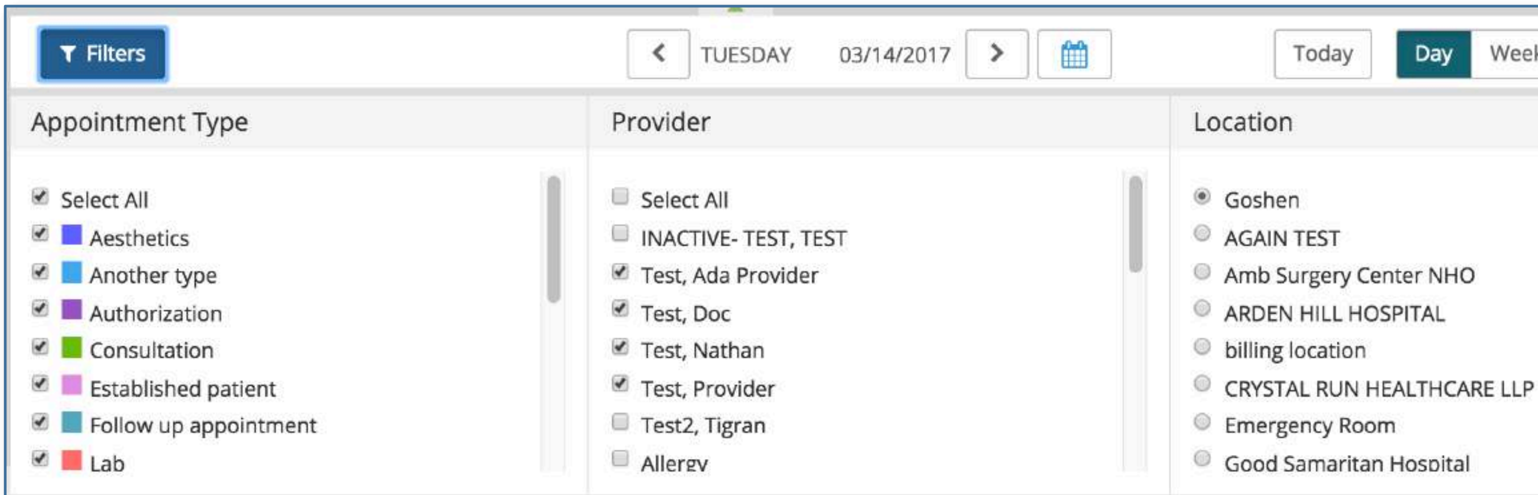
Workflow:

1. View the new dialog boxes by clicking on a scheduled patient
2. The Appointment Pop-up Box will appear
3. View or edit the appointment details including name, date & time, location, provider and notes. From here, you can also reschedule and cancel appointments

Smart Filters

New filtering tools allow the easy display of

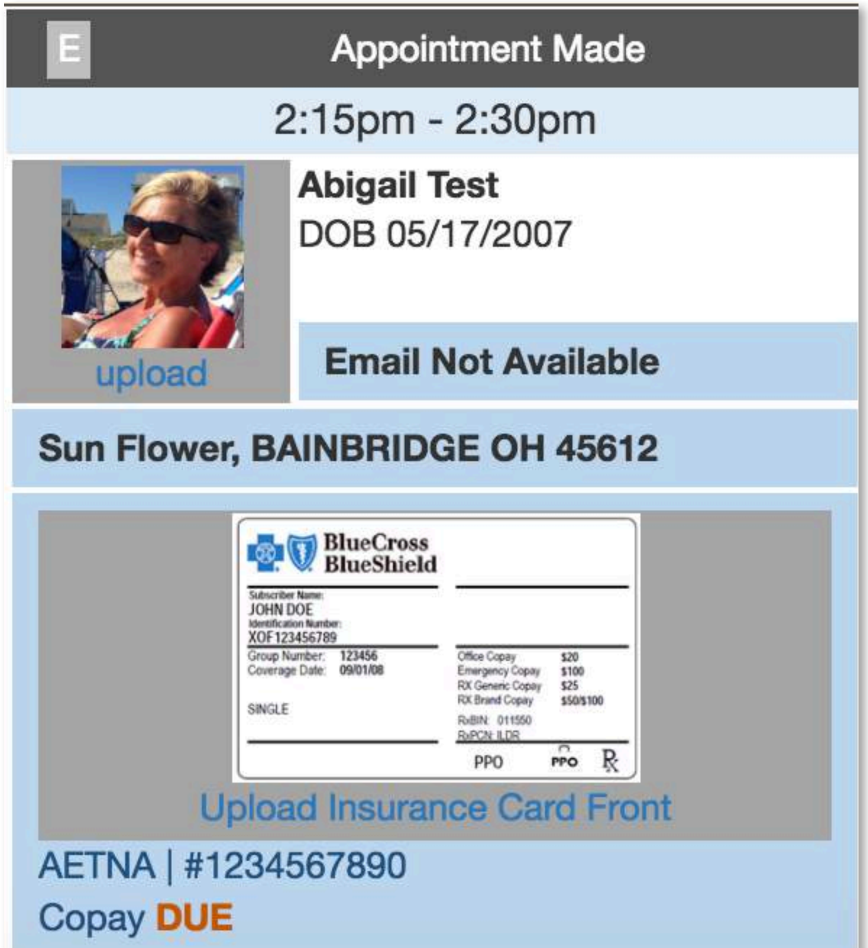
Providers, Appointment Types, and **Practice Locations.**



Workflow:

1. Open by selecting **Filters** in the header
2. Check the select all button or filter your items based on the information you want to appear on your schedule
3. Collapse the Filters box by selecting the Filters button again

Customizable Appointment Pop-up Box

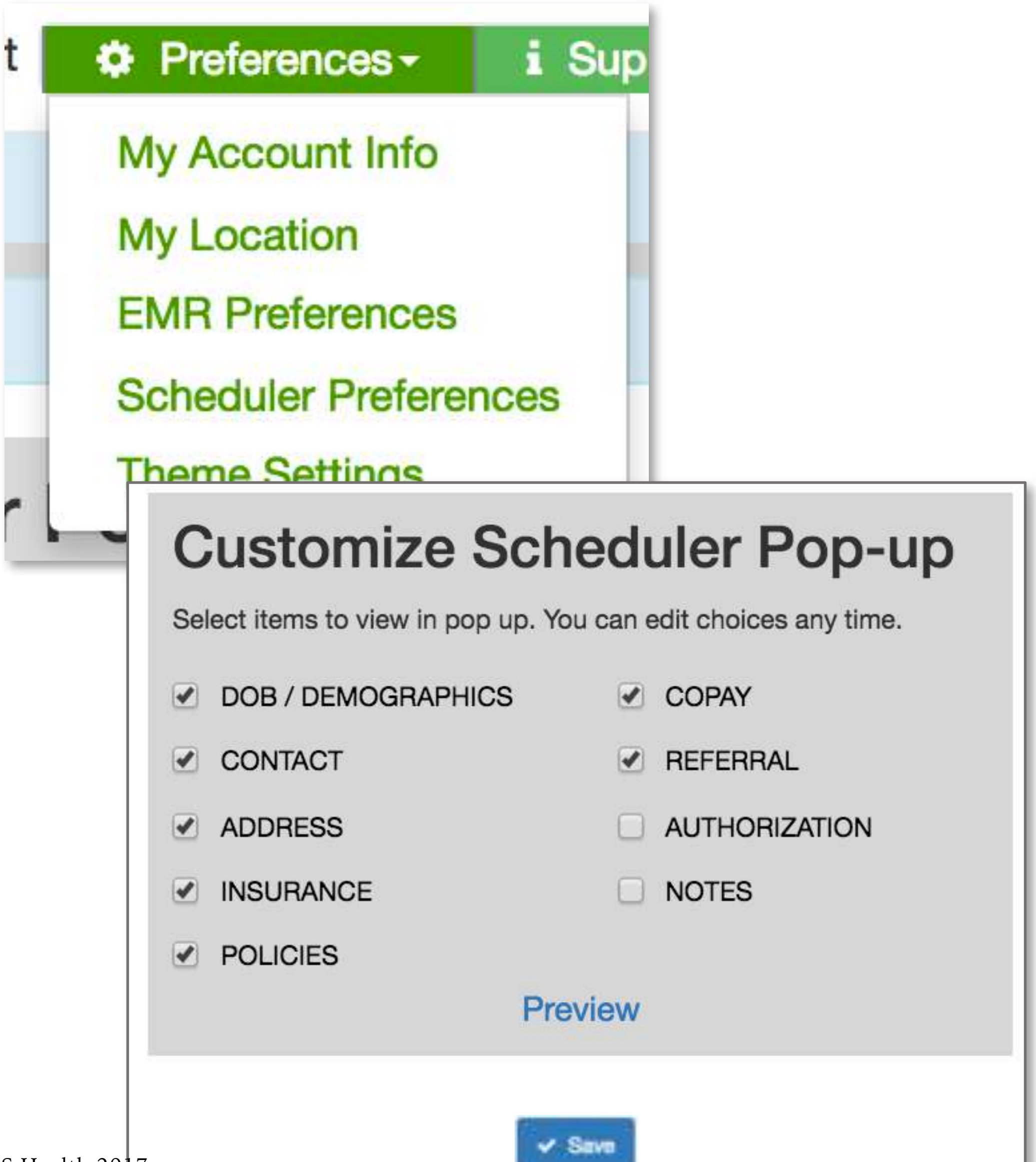


This appointment-specific hover box allows the user to quickly view and collect key data. This is a user-level preference, not a practice setting.

Users can display:

1. Patient Photo
2. Appointment Status and Time
3. Key Demographics
4. Insurance Card & Co-Pay
5. Referral
6. Authorization
7. Notes

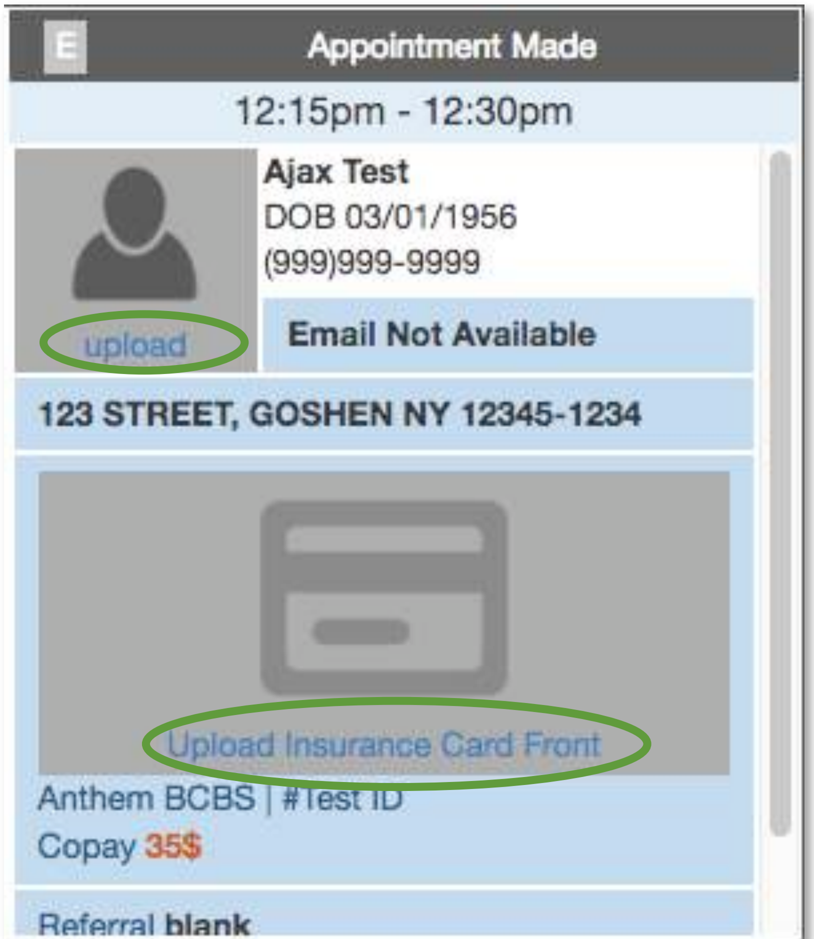
Customizing Your Appointment Box



Workflow:

1. Go to: **Preferences>Scheduler Preferences**
2. Select the elements to be displayed
3. **Preview** to view your customized box
4. Select **Save**
5. Go to **Scheduler View** to see the box in your schedule

Uploading Photos to your Appointment Box

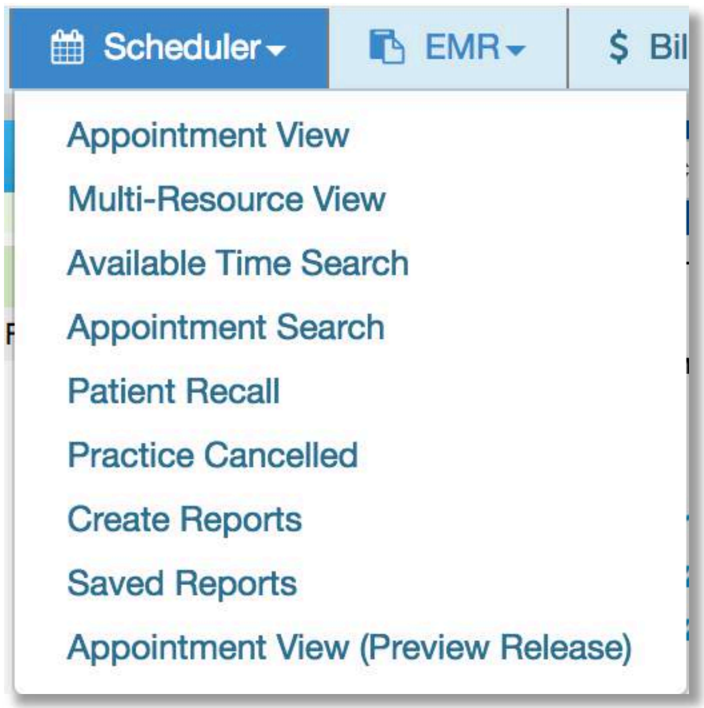


You can easily add a patient's photo and insurance card from the **Appointment Pop-up Box** in the **Scheduler View**.

Workflow:

1. Directly in the box, select **Upload**
2. Upload the patient photo and/or the insurance card from your computer

Easy Access

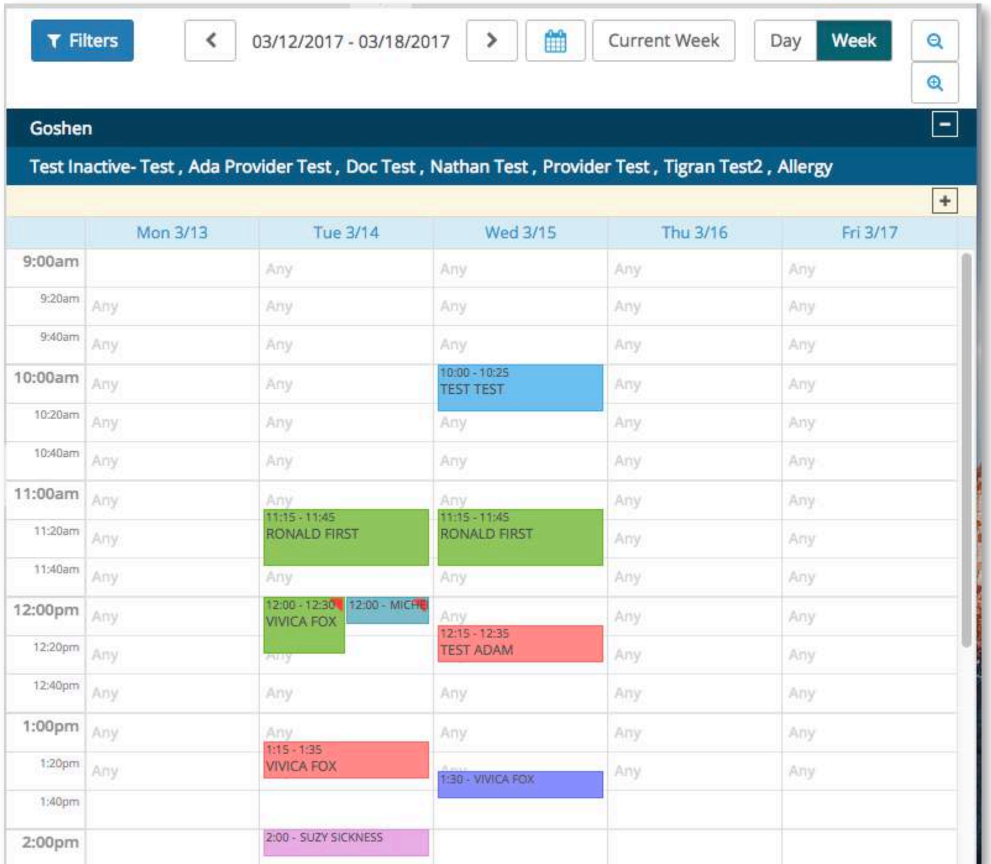


You can access the new Scheduler by selecting Appointment View (Preview Release) on the top of the Scheduler dropdown menu.

Note that the current scheduler will also be available for limited time. It will then get retired and this new scheduler will take its place.

IMPROVED VISIBILITY

Visual Improvements

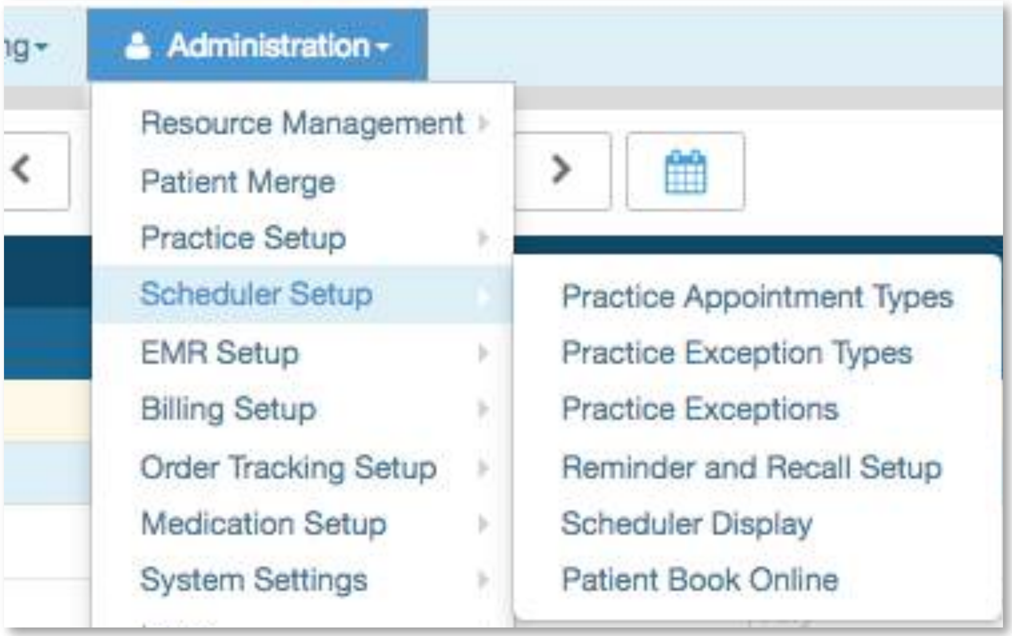


Optimized:

1. **Colors:** Muted versions of the colors in your scheduler allow for enhanced visibility. This change does not impact your template or appointment types
2. **Grid:** Additional grid lines and 15-minute time blocks make it easier to schedule and view appointments
3. **Exception & Double-Booked Indicator:** A red triangle in the corner of appointment boxes allows you to quickly identify when there is an exception or a double-booking
4. **Header Bar:** Two different background colors makes it easy to distinguish between your location and selected provider.

PRACTICE SETUP CHANGES

Making Changes to Your Setup



None of the enhancements to the scheduler alter your templates, settings, or preferences.

- To make changes to your appointment and/or exception types, go to: **Admin>Scheduler Setup**.
- To make changes to your provider list, go to: **Admin>Resource Management**

If you need assistance please contact us at
Support@waitingroomsolutions.com