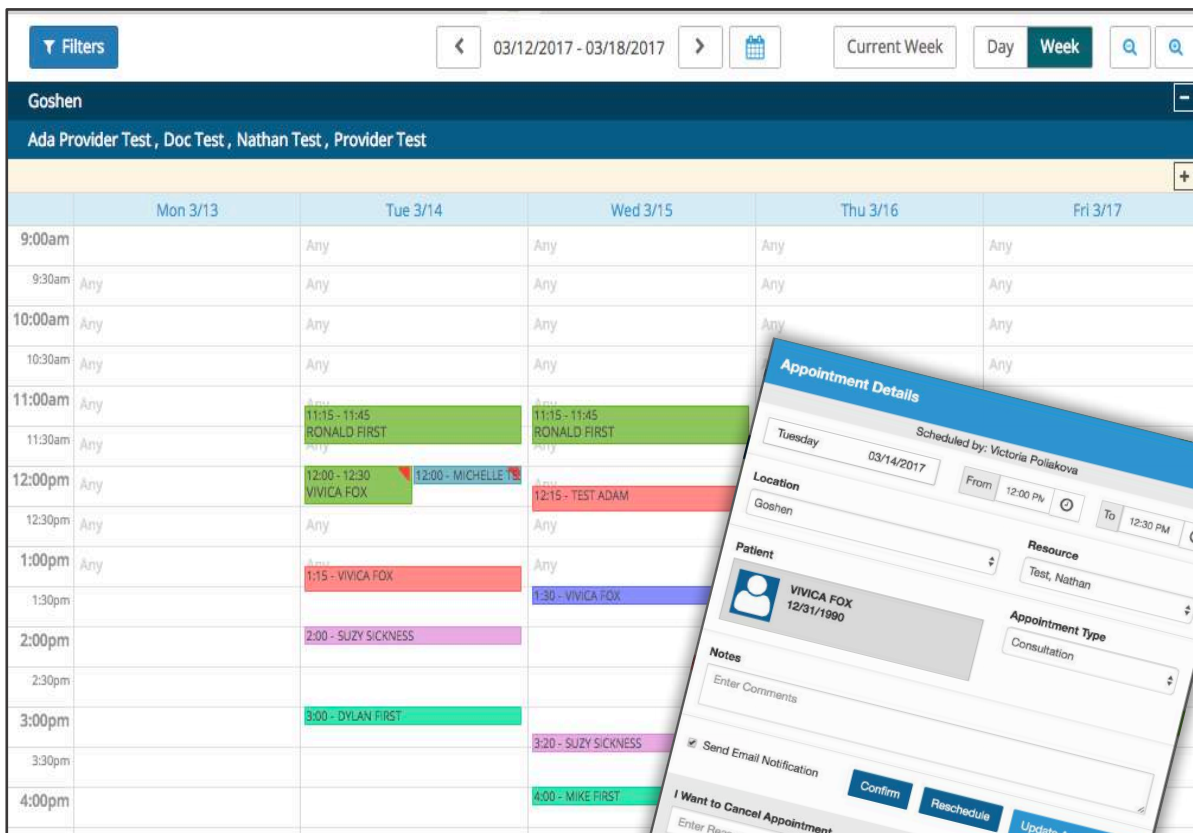


To: All WRS Users  
 From: WRS Development Team  
 Date: 04/10/2017  
 Re: Software Release



The screenshot displays a web-based scheduler interface. At the top, there are navigation elements including a 'Filters' button, a date range selector (03/12/2017 - 03/18/2017), and view options (Current Week, Day, Week). Below this, the location 'Goshen' is selected, and a list of providers is shown: 'Ada Provider Test, Doc Test, Nathan Test, Provider Test'. The main area is a calendar grid with columns for days (Mon 3/13 to Fri 3/17) and rows for time slots (9:00am to 4:00pm). Appointments are represented by colored bars with text labels such as 'RONALD FIRST', 'VIVICA FOX', and 'SUZY SICKNESS'. A pop-up dialog titled 'Appointment Details' is overlaid on the calendar, showing information for a Tuesday appointment on 03/14/2017 at 12:00 PM. The dialog includes fields for Location (Goshen), Patient (VIVICA FOX), Resource (Test, Nathan), Appointment Type (Consultation), and a 'Send Email Notification' checkbox. At the bottom of the dialog, there are buttons for 'Confirm', 'Reschedule', and 'Update Appointment', along with a section for 'I Want to Cancel Appointment' with a 'Cancel Appointment' button.

## 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

	Mon 3/13	Tue 3/14	Wed 3/15	Thu 3/16	Fri 3/17
9:00am		Any	Any	Any	Any
9:20am	Any	Any	Any	Any	Any
9:40am	Any	Any	Any	Any	Any
10:00am	Any	Any	10:00 - 10:25 TEST TEST	Any	Any
10:20am	Any	Any	Any	Any	Any
10:40am	Any	Any	Any	Any	Any
11:00am	Any	Any	Any	Any	Any
11:20am	Any	11:15 - 11:45 RONALD FIRST	11:15 - 11:45 RONALD FIRST	Any	Any
11:40am	Any	Any	Any	Any	Any
12:00pm	Any	12:00 - 12:30 VIVICA FOX	12:00 - MICHELLE TEST	Any	Any
12:20pm	Any	Any	12:15 - 12:35 TEST ADAM	Any	Any
12:40pm	Any	Any	Any	Any	Any

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.

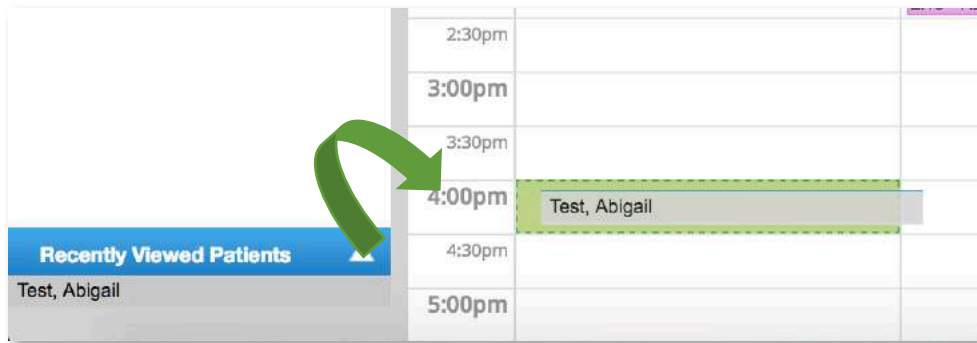
	A.Test	D.Test	N.Test	P.Test
11:10am	Any	Established Patient	Any	11:15 - 11:45 RONALD FIRST
11:20am	Any	Established Patient	Any	
11:30am	Any	Established Patient	Any	
11:40am	Any	Established Patient	Any	
11:50am	Any	Established Patient	Any	
12:00pm	Any	Established Patient	12:00 - 12:30 VIVICA FOX	12:00 - 12:15 MICHELLE TEST
12:10pm	Any	Established Patient		
12:20pm	Any	Established Patient		
12:30pm	Any	Established Patient	Any	Any
12:40pm	Any	Established Patient	Any	Any

## 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

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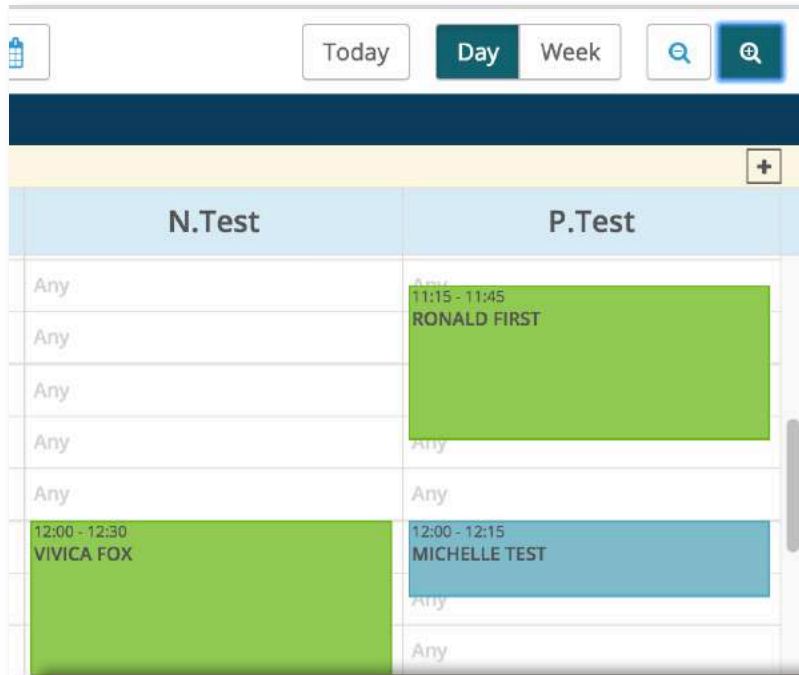


Patient names can be dragged from Recently Viewed Patients and Today's Appointments into the Scheduler. Appointments can be dragged and dropped between slots in any Scheduler View.

## 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

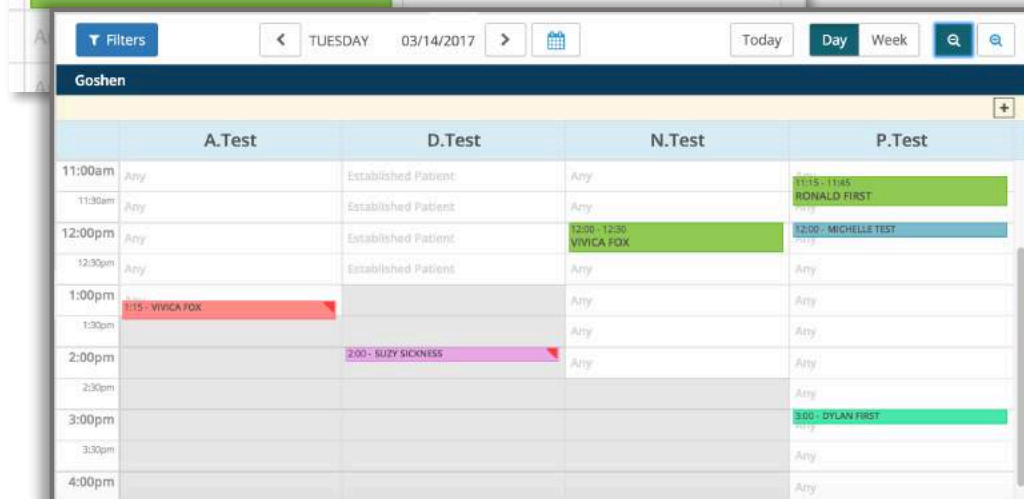


New Zoom In and Zoom Out buttons have been added to all scheduler windows.

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

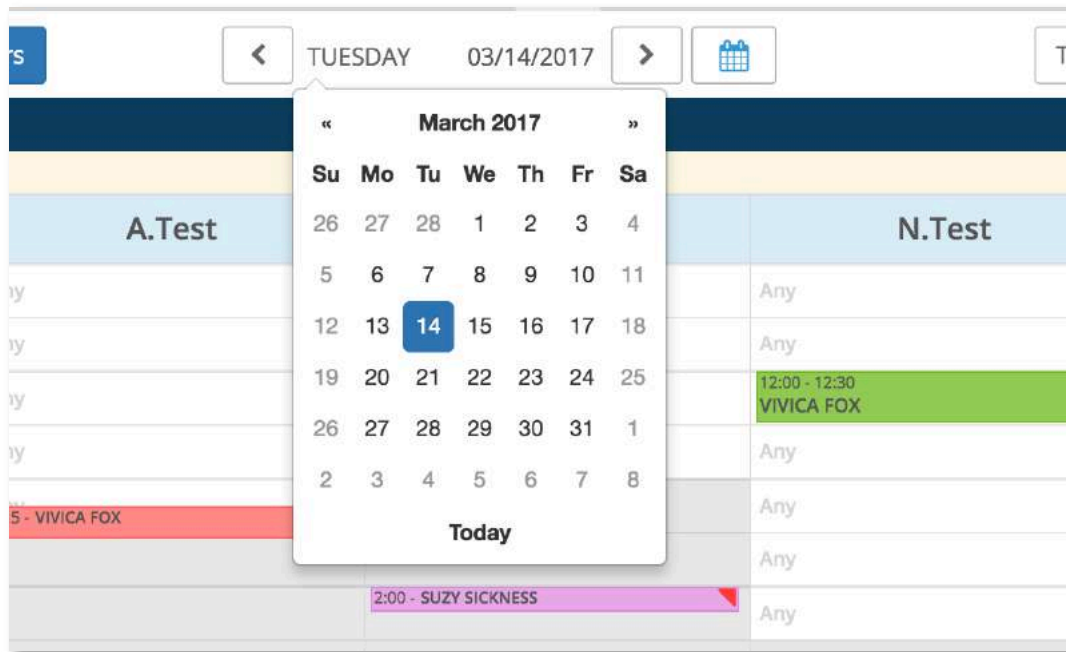
## Workflow:

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

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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

The screenshot shows a pop-up window titled "Appointment Details" with a close button (X) in the top right corner. The window is divided into several sections:

- Scheduled by:** Victoria Poliakova
- Date:** Tuesday, 03/14/2017
- Time:** From 12:00 PM to 12:30 PM, with clock icons for editing.
- Location:** Goshen (dropdown menu)
- Resource:** Test, Nathan (dropdown menu)
- Patient:** VIVICA FOX, 12/31/1990 (with a profile icon)
- Appointment Type:** Consultation (dropdown menu)
- Notes:** A text area with the placeholder "Enter Comments".
- Actions:** A checkbox for "Send Email Notification" (checked), and three buttons: "Confirm", "Reschedule", and "Update Appointment".
- Cancel Option:** A section titled "I Want to Cancel Appointment" with a text area for "Enter Reason" and a red "Cancel Appointment" button.

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

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**Appointment Details** ✕

Scheduled by: Victoria Poliakova

Tuesday 03/14/2017 From 12:00 PM To 12:30 PM

**Location** Goshen **Resource** Test, Nathan

**Patient** **VIVICA FOX**  
12/31/1990 **Appointment Type** Consultation

**Notes**  
Enter Comments

Send Email Notification **Confirm** **Reschedule** **Update Appointment**

**I Want to Cancel Appointment**  
Enter Reason **Cancel Appointment**

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

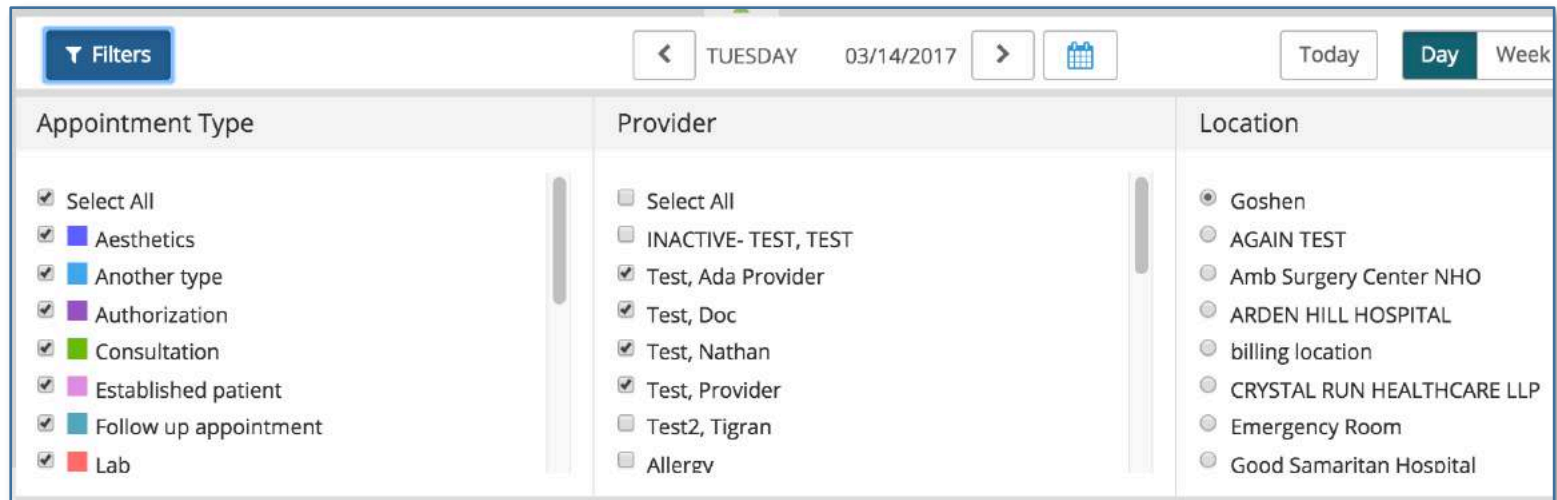
## Workflow:

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


**E** **Appointment Made**

**2:15pm - 2:30pm**

**Abigail Test**  
DOB 05/17/2007

[upload](#) **Email Not Available**

**Sun Flower, BAINBRIDGE OH 45612**

  
**Upload Insurance Card Front**

**AETNA | #1234567890**  
**Copay DUE**

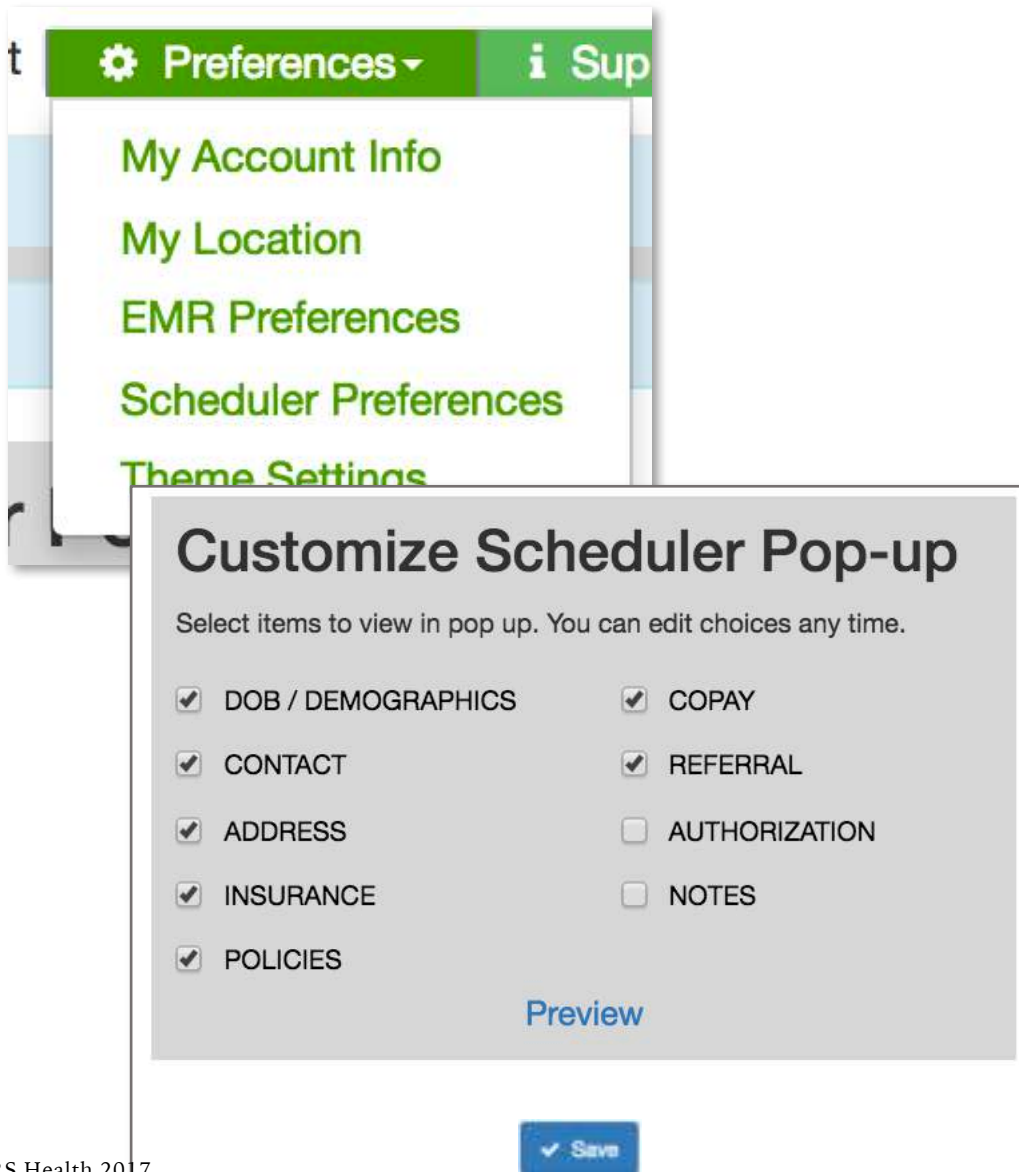
This appointment-specific hover box allows the user to quickly view and collect key data. This is a user-level preference, not a practice setting.

## 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

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## 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

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The screenshot shows a mobile application interface for an appointment. At the top, it says "Appointment Made" with a time slot of "12:15pm - 12:30pm". Below this, the patient's name "Ajax Test" is displayed along with their "DOB 03/01/1956" and phone number "(999)999-9999". A blue button labeled "upload" is circled in green next to a placeholder icon for a patient photo. To the right of the photo icon, it says "Email Not Available". Below the patient information, the address "123 STREET, GOSHEN NY 12345-1234" is shown. A large grey area contains a placeholder icon for an insurance card, with a blue button labeled "Upload Insurance Card Front" circled in green below it. At the bottom, the insurance provider is listed as "Anthem BCBS | #test ID", the copay is "35\$", and the referral status is "Referral blank".

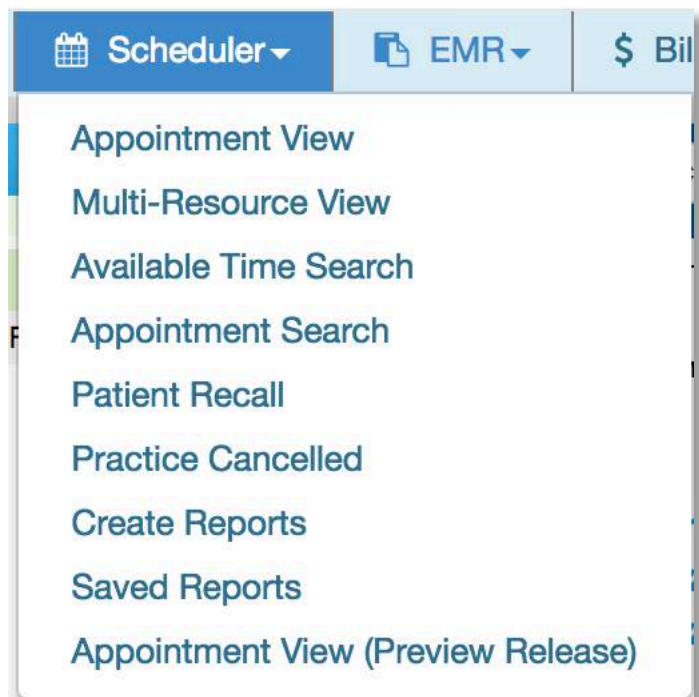
You can easily add a patient's photo and insurance card from the **Appointment Pop-up Box** in the **Scheduler View**.

## Workflow:

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

# Easy Access

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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

The screenshot shows a medical scheduler interface for 'Goshen'. At the top, there are navigation controls including a 'Filters' button, a date range '03/12/2017 - 03/18/2017', a calendar icon, 'Current Week', and view options for 'Day' and 'Week'. Below the navigation is a header bar for 'Goshen' with a list of test types: 'Test Inactive- Test , Ada Provider Test , Doc Test , Nathan Test , Provider Test , Tigran Test2 , Allergy'. The main area is a grid with columns for days of the week (Mon 3/13, Tue 3/14, Wed 3/15, Thu 3/16, Fri 3/17) and rows for time slots from 9:00am to 2:00pm. Appointments are represented by colored boxes with text indicating the provider and time. A red triangle in the corner of some boxes indicates an exception or double-booking. For example, on Tue 3/14, there is a green box for 'RONALD FIRST' from 11:15-11:45 and a red box for 'VIVICA FOX' from 1:15-1:35. On Wed 3/15, there is a blue box for 'TEST TEST' from 10:00-10:25 and a red box for 'TEST ADAM' from 12:15-12:35. On Thu 3/16, there is a blue box for 'VIVICA FOX' from 1:30-1:45. On Fri 3/17, there is a purple box for 'SUZY SICKNESS' from 2:00-2:15.

	Mon 3/13	Tue 3/14	Wed 3/15	Thu 3/16	Fri 3/17
9:00am		Any	Any	Any	Any
9:20am	Any	Any	Any	Any	Any
9:40am	Any	Any	Any	Any	Any
10:00am	Any	Any	10:00 - 10:25 TEST TEST	Any	Any
10:20am	Any	Any	Any	Any	Any
10:40am	Any	Any	Any	Any	Any
11:00am	Any	Any	Any	Any	Any
11:20am	Any	11:15 - 11:45 RONALD FIRST	11:15 - 11:45 RONALD FIRST	Any	Any
11:40am	Any	Any	Any	Any	Any
12:00pm	Any	12:00 - 12:30 VIVICA FOX	12:00 - MICHAEL	Any	Any
12:20pm	Any	Any	12:15 - 12:35 TEST ADAM	Any	Any
12:40pm	Any	Any	Any	Any	Any
1:00pm	Any	Any	Any	Any	Any
1:20pm	Any	1:15 - 1:35 VIVICA FOX	1:30 - VIVICA FOX	Any	Any
1:40pm					
2:00pm		2:00 - SUZY SICKNESS			

## Optimized:

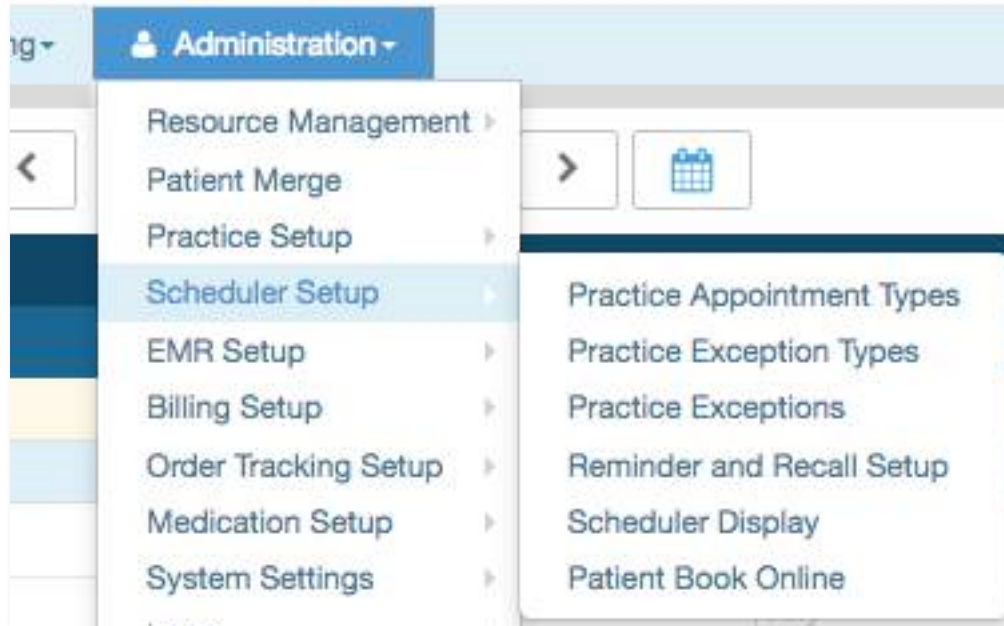
1. **Colors:** Muted versions of the colors in your scheduler allow for enhanced visibility. This change does not impact your template or appointment types
2. **Grid:** Additional grid lines and 15-minute time blocks make it easier to schedule and view appointments
3. **Exception & Double-Booked Indicator:** 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

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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](mailto:Support@waitingroomsolutions.com)