



**To:** All WRS Users  
**From:** WRS Development Team  
**Date:** 04/25/2014  
**Re:** WRS Health System Update

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The WRS Development Team will perform an update on or about April 25, 2014. This release will include the following functionality as mandated by Meaningful Use Stage 2 requirements:

#### **Patient Representative Portal Access**

Functionality has been added to allow portal access to a patient-designated representative(s). This allows a family member, or other designee, to access that patient's health record on patient portal. Patient Representatives can be added by practice users under **Patient Management** or by the patient on the portal website.

Please note that granting access to a patient representative is done exclusively at the discretion of the practice. All existing practice privacy and access policies should be carefully outlined and followed when using this functionality.

#### **Designating a Patient Representative (Practice Users)**

Practice users can add a representative under **Patient Management>Contact>Add New Emergency Contact**. The user then enters contact information and check the **Patient Portal Access** box:

Providers	Consents/Directives	Account Information	Appointment Search	Referrals	Authorizations	Comments	Printout
Personal Information	Insurance	Contact Information	Medical History	Medications	Pharmacies	Social History	DC

Contact Information for Abby Test

Contact Addresses

[+ Add Address](#)

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Contact Phone Numbers

[+ Add Phone](#)

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Emergency and Family Contacts

[+ Add Emergency Contact](#)

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Email Addresses

Email	Comments	
zdemo@wrshealth.com	PRIMARY	<a href="#">Edit</a>

[+ Add Email](#)

Once the **Portal Access** box is checked, the user will be required to enter an **Email** for the representative (contact):

### Add New Emergency Contact

\* = Required

First Name\*

Last Name\*

Address 1

Address 2

City

State

Zip

Phone  -  -

Mobile Phone  -  -

Email  x

Patient Portal Access

Relationship

Mother's Maiden Name

[Submit](#)

Emergency and Family Contacts					
Full Name	Address	Phone	Relationship		
<a href="#">Mary Test</a>	1 State Street Monroe, NY, 10950	(222) 222-2222	Mother	<a href="#">Details</a>	<a href="#">Delete</a>

**+ Add Emergency Contact**

The representative (contact) will then be added the patient’s account. Notification emails will be sent to the patient and representative’s email accounts:

Sample of email sent to patient notifying them that access to their patient health record has been granted:

**ENT SPECIALTY CARE**

***Access to Patient Health Record for Craig Smith via ENT SPECIALTY CARE Website Portal***

Dear Craig Smith,

Gloria Smith ([gloriasmith1456@yahoo.com](mailto:gloriasmith1456@yahoo.com)) was recently granted access to your patient health record on the ENT SPECIALTY CARE patient portal website. If you believe this access was granted by mistake please call ENT SPECIALTY CARE at (866) 977-4367 immediately.

**4/24/2014**



▶ Book Appt. Online

▶ View Test Results

▶ Update My Records

▶ My Educational Resources

Sample of email to patient representative (contact) notifying them that they have been granted portal access, includes instructions for login:

ENT SPECIALTY CARE

Access to Patient Health Record for Craig Smith via ENT SPECIALTY CARE Website Portal

4/24/2014

Dear Gloria,

Craig Smith has given permission for you to access his/her health record on the ENT SPECIALTY CARE patient portal website.

Please use your current portal login email and password to access this information at:

[https://www.waitingroomsolutions.com/live/patient\\_v2/index.php?id=983266](https://www.waitingroomsolutions.com/live/patient_v2/index.php?id=983266)

Note that this link can also be used to reset your portal password, if needed

If you believe you have received this message in error, please contact the ENT SPECIALTY CARE at (866) 977-4367 immediately



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### Patient Representative – Email Address

When an email is entered for a patient representative, the system checks to see if that email address is already associated with a WRS patient record. If the **Email** is already on file the user is presented with the patient(s) to which that email is already linked.

#### Add New Emergency Contact

\* = Required

A patient portal login already exists for this email. Verify the contact details or provide a different email address.

Name	Address	Email	
Dave Test	123 Smith Street GOSHEN, NY 10924	clamboy+dave@wrshealth.com	<a href="#" style="color: #0056b3;">Verify</a>

First Name\*

Last Name\*

Address 1

Pressing **Verify** will add that patient representative and email under the current patient account. If the information cannot be verified, the user can enter another email address or uncheck the **Portal Access** box.

## Disabling Representative Login

A patient representative's access can be revoked at any time by updating unchecking the **Patient Portal Access** Checkbox.

Email	<input type="text" value="mom@test.com"/>
Patient Portal Access	<input type="checkbox"/>
Relationship	<input type="text" value="Mother"/>

## Designating a Patient Representative (Patient Portal)

The patient can also designate their own representative by logging into the Patient Portal and selecting **Phone and Contact** section:

### MANAGE MY MEDICAL RECORD • QUICK LINKS

-  **Email and Password**
-  **Personal Info**
-  **Phone and Contact**
-  **Current Medications**
-  **Edit Pharmacy Locations**

Adding a new **Emergency and Family Contact** will give the patient the ability to check **the Portal Access** box and enter an email address (above) for person they wish to designate as a representative:

### Emergency and Family Contacts

#### Add New Emergency Contact

[+ Add Emergency Contact](#)

\* = Required

**First Name\***

**Last Name\***

**Address 1**

**Address 2**

### Emergency and Family Contacts

Full Name	Address	Phone	Relationship		
Mom Test	1 State Street Goshen, NY, 10950	(999) 999-9999	Mother	Details	Delete

[+ Add Emergency Contact](#)

### Patient Representative Website Access

When a representative logs into the patient portal they will be directed to a new page called **Profiles**. Profiles of all patients connected to that email login will be listed. Clicking on the **Patient Name** will allow the representative to view that patient's health record.

Profiles
Dashboard Menu
My Health Record (37.5% complete) ▾
Contact

Diet Calculator ▾

## Profiles

Please select the profile you would like to view below:

	Nora Test123	Date of Birth: 01/19/1970	1 State Street, MONROE, NY 10950
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The representative can click on the profiles link at any time to view the list of patients they represent. If the representative is also a patient, his/her own name will show in the list on the profiles page. Note that the representative cannot view any pages on the portal until a Profile is selected. They will now has access to portal functionality including **Messaging, Medical History** and **Insurance** information.

#### MANAGE MY MEDICAL RECORD • QUICK LINKS

Email and Password

Personal Info

Phone and Contact

Current Medications

Edit Pharmacy Locations

Medical History

Lifestyle & Social History

Insurance Information

Appointment History

Request History

My Healthcare Providers

My Practices

Directives

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#### CONTACT AND COMMUNICATIONS • QUICK LINKS

Check inbox messages

Send message to office staff

Request Appointment

Book Appointment Online