

To: All WRS Users

From: WRS Development Team

Date: 04/25/2014

Re: WRS Health System Update

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:

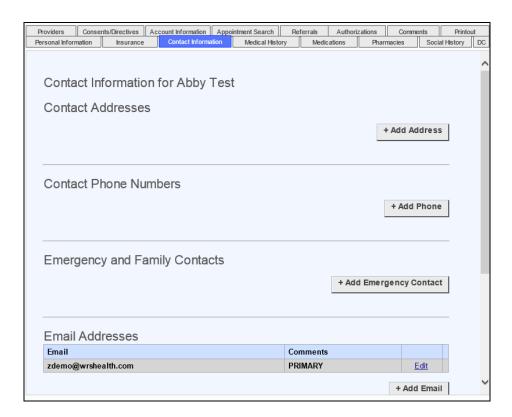
Patient Representative Portal Access

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:



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



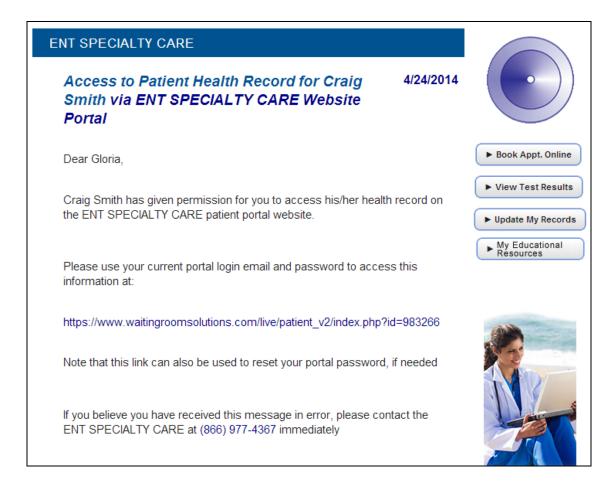


The representative (contact) will then be added the patient's account. Notification emails will be sent to the patient and representative's email accounts:

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

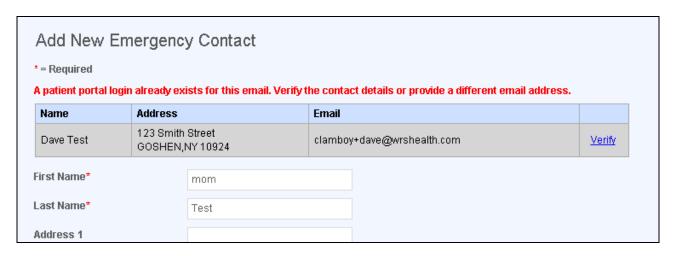


Sample of email to patient representative (contact) notifying them that they have been grated portal access, includes instructions for login:



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.



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.**



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:



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:





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.



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.

