To: All WRS Users

From: WRS Development Team

Date: 05/17/2013

Re: Update to Waiting Room Solutions System

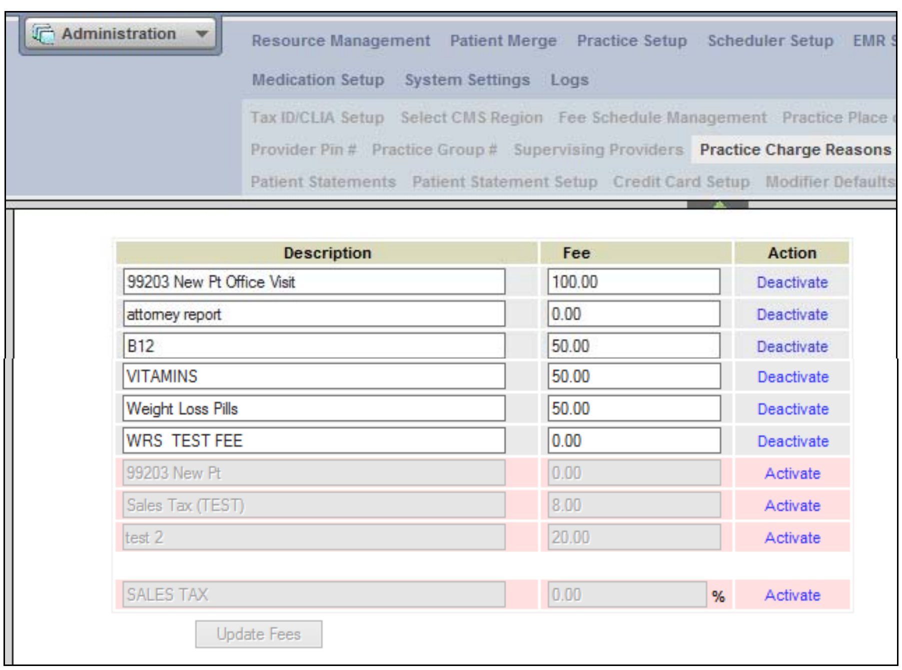
---

The WRS Development Team will be performing a software update on or about May 17, 2013. This release will include the following:

## SALES TAX CALCULATION (Click to View Video)

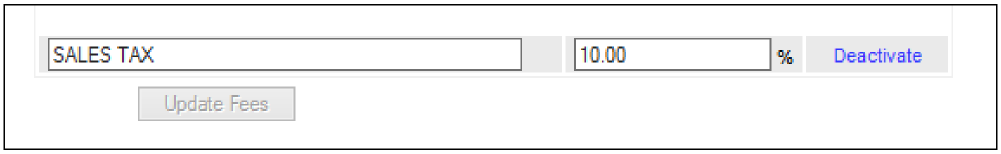
Functionality has been added to calculate and record **Sales Tax** for **Miscellaneous Charges**, when applicable. In addition, all **Sales Tax** - **Charged/Collected** can be tracked using the existing **Activity Report – Miscellaneous** function.

Note that **Sales Tax** functionality is optional and available to all practices. In order to enable this function, the practice must activate it under **Administration>Billing Setup>Practice Charge Reasons.** Once on this page, scroll to the bottom and select **Sales Tax>Activate** (right column):

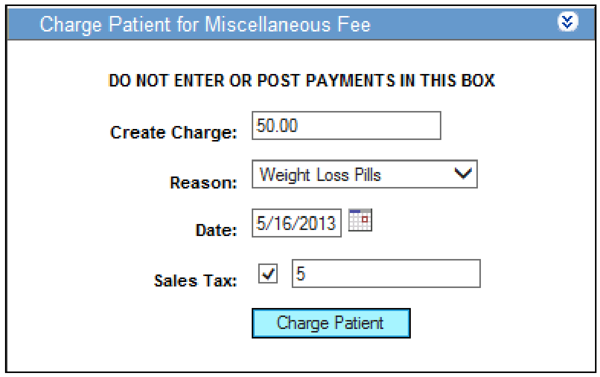



| Description | Fee | Action |
|---|---|---|
| 99203 New Pt Office Visit | 100.00 | Deactivate |
| attorney report | 0.00 | Deactivate |
| B12 | 50.00 | Deactivate |
| VITAMINS | 50.00 | Deactivate |
| Weight Loss Pills | 50.00 | Deactivate |
| WRS TEST FEE | 0.00 | Deactivate |
| 99203 New Pt | 0.00 | Activate |
| Sales Tax (TEST) | 8.00 | Activate |
| test 2 | 20.00 | Activate |
| SALES TAX | 0.00 % | Activate |

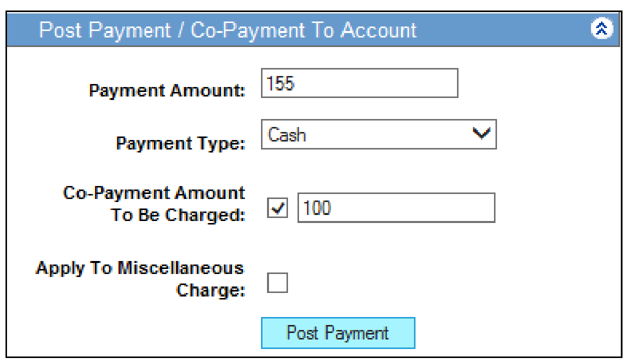
Next, enter a **Sales Tax Percentage** in the **Fee** column and press **Update Fees**:



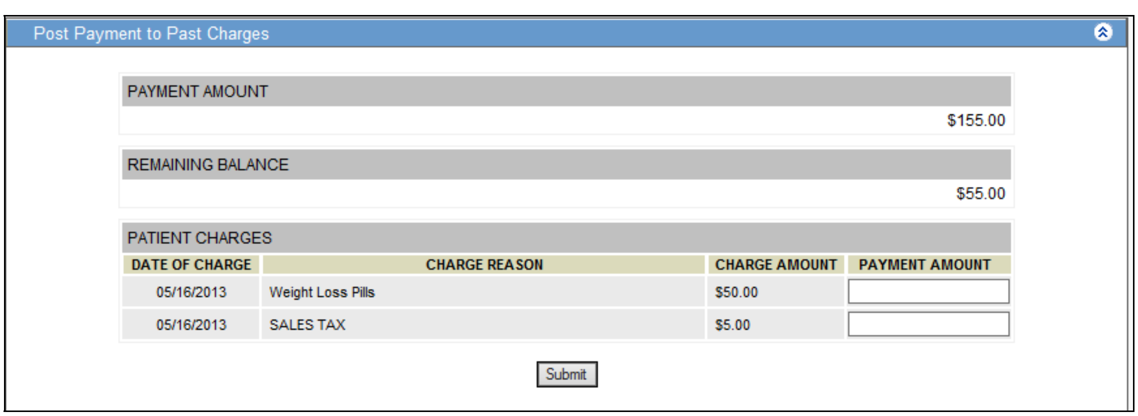

When charging **Sales Tax** on a miscellaneous item, go to the **Patient Account Screen** (check-in/out) and select **Charge Patient for Miscellaneous Fee.** Then, select a **Reason** from the dropdown list. Check the **Sales Tax** box to automatically calculate the **Sales Tax** based on the **Miscellaneous Fee**. Click **Charge Patient** to post the charge to the patient's account:



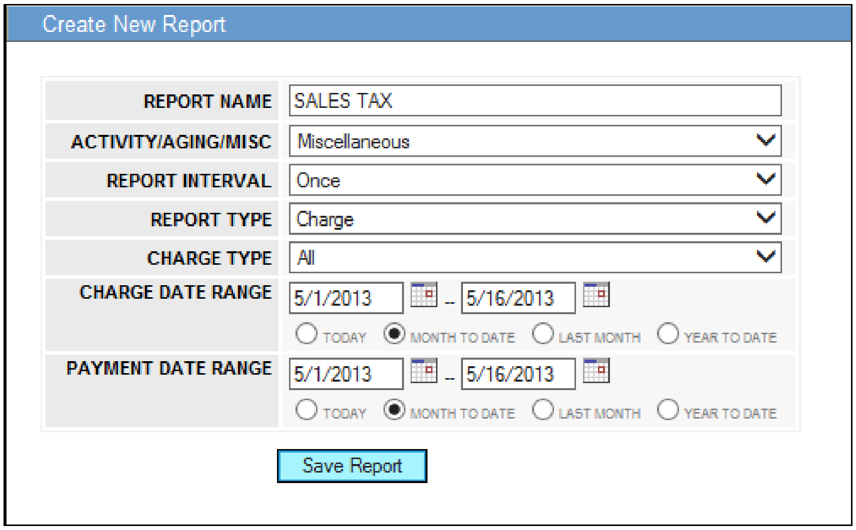

To record a payment made by the patient add the **Payment Amount** (including **Sales Tax** and **Co-Payment**). Press **Post Payment** to record it to their account:



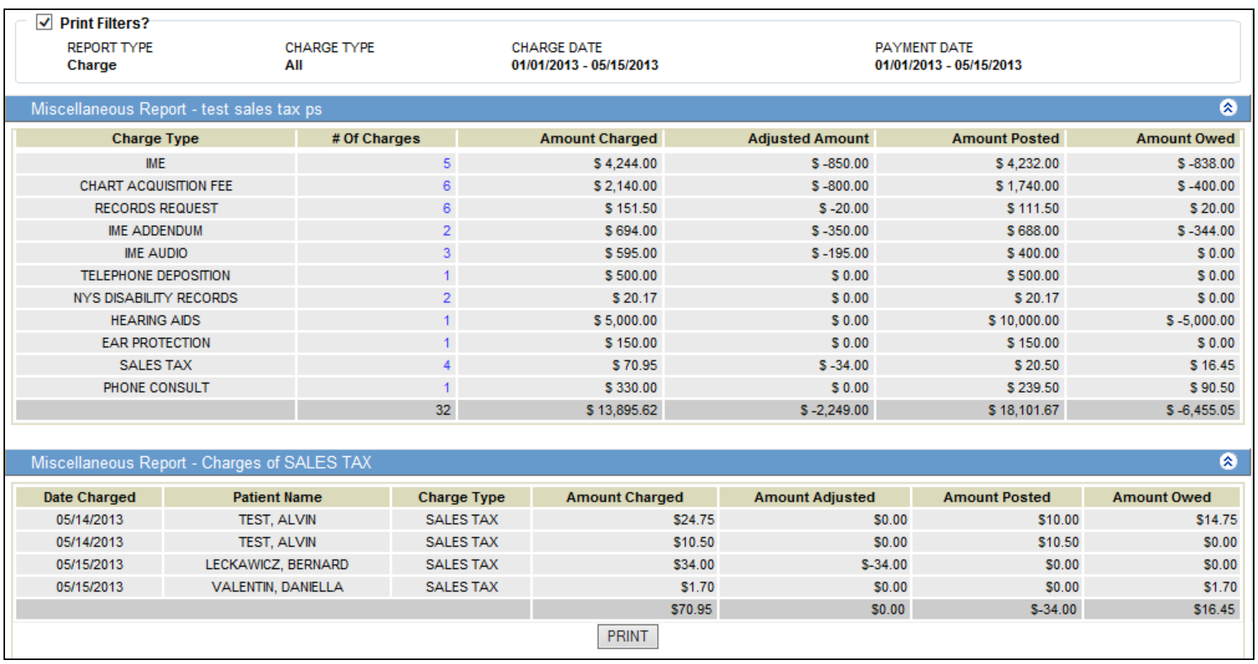

Once this step is complete, you can **Apply** the **Payment Amount** to the **Remaining Balance:**



To create a report on **Sales Tax - Charged/Collected** go to **Billing>Reports>Saved Reports.** Enter a **Name** for the report and select **MISC** under **Activity>Aging>Misc.** Press **Save Report** to finalize. The report will run overnight and be ready the next morning:




To view the report go to **Billing>Reports>Saved Reports** and click on the **Report Name**:



Print Filters?

| REPORT TYPE | CHARGE TYPE | CHARGE DATE | PAYMENT DATE |
|---|---|---|---|
| Charge | All | 01/01/2013 - 05/15/2013 | 01/01/2013 - 05/15/2013 |

Miscellaneous Report - test sales tax ps

| Charge Type | # Of Charges | Amount Charged | Adjusted Amount | Amount Posted | Amount Owed |
|---|---|---|---|---|---|
| IME | 5 | $ 4,244.00 | $ -850.00 | $ 4,232.00 | $ -838.00 |
| CHART ACQUISITION FEE | 6 | $ 2,140.00 | $ -800.00 | $ 1,740.00 | $ -400.00 |
| RECORDS REQUEST | 6 | $ 151.50 | $ -20.00 | $ 111.50 | $ 20.00 |
| IME ADDENDUM | 2 | $ 694.00 | $ -350.00 | $ 688.00 | $ -344.00 |
| IME AUDIO | 3 | $ 595.00 | $ -195.00 | $ 400.00 | $ 0.00 |
| TELEPHONE DEPOSITION | 1 | $ 500.00 | $ 0.00 | $ 500.00 | $ 0.00 |
| NYS DISABILITY RECORDS | 2 | $ 20.17 | $ 0.00 | $ 20.17 | $ 0.00 |
| HEARING AIDS | 1 | $ 5,000.00 | $ 0.00 | $ 10,000.00 | $ -5,000.00 |
| EAR PROTECTION | 1 | $ 150.00 | $ 0.00 | $ 150.00 | $ 0.00 |
| SALES TAX | 4 | $ 70.95 | $ -34.00 | $ 20.50 | $ 16.45 |
| PHONE CONSULT | 1 | $ 330.00 | $ 0.00 | $ 239.50 | $ 90.50 |
| | 32 | $ 13,895.62 | $ -2,249.00 | $ 18,101.67 | $ -6,455.05 |

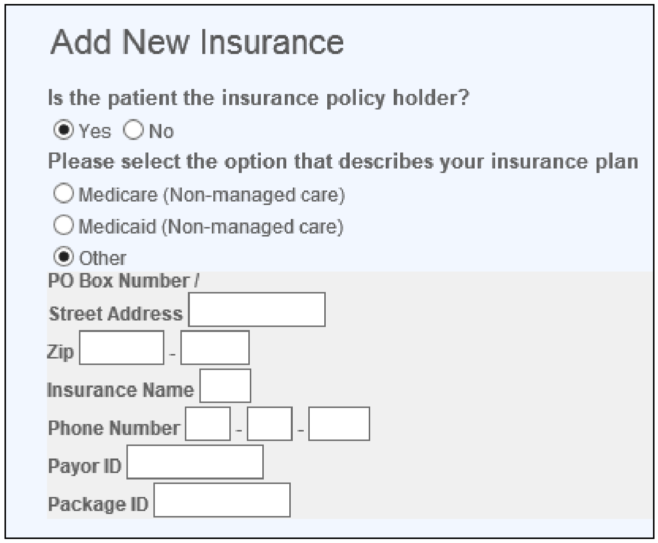
Miscellaneous Report - Charges of SALES TAX

| Date Charged | Patient Name | Charge Type | Amount Charged | Amount Adjusted | Amount Posted | Amount Owed |
|---|---|---|---|---|---|---|
| 05/14/2013 | TEST, ALVIN | SALES TAX | $24.75 | $0.00 | $10.00 | $14.75 |
| 05/14/2013 | TEST, ALVIN | SALES TAX | $10.50 | $0.00 | $10.50 | $0.00 |
| 05/15/2013 | LECKAWICZ, BERNARD | SALES TAX | $34.00 | $-34.00 | $0.00 | $0.00 |
| 05/15/2013 | VALENTIN, DANIELLA | SALES TAX | $1.70 | $0.00 | $0.00 | $1.70 |
| | | | $70.95 | $0.00 | $-34.00 | $16.45 |

PRINT

### SEARCH FOR INSURANCE BY P.O. BOX

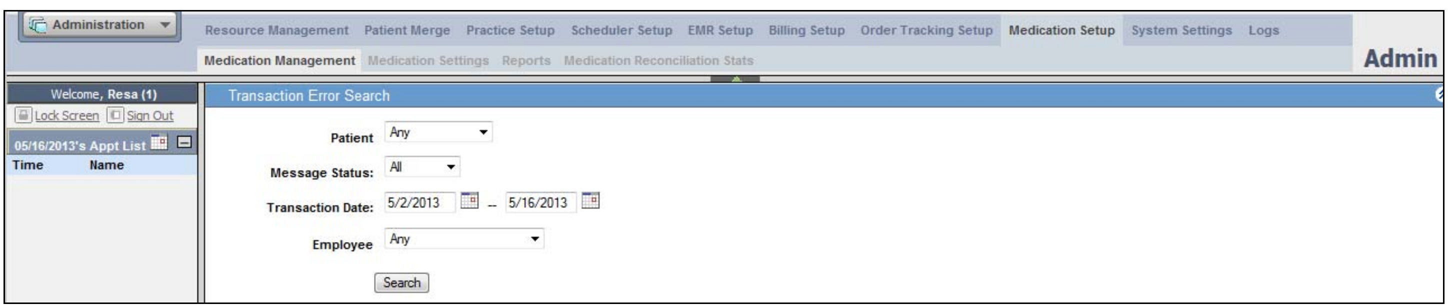
The ability to **Add New Insurance** by **PO Box Number** has been added. To use this function simply enter a **PO Box Number** under **Patient Management>Insurance>Add New Insurance**. Please note that while this new functionality will prove helpful, WRS still strongly encourages the use of the practice **Insurance Pick list** as the primary method for adding an insurance.



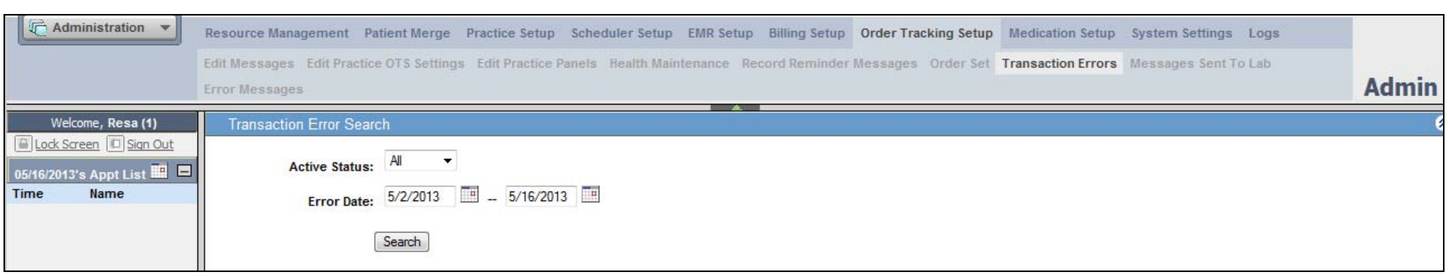

## UPDATE TO TRANSACTION LOGS

Several of the existing **Transaction Error Logs** have been relocated in an effort to group functionality and make user workflow more efficient.

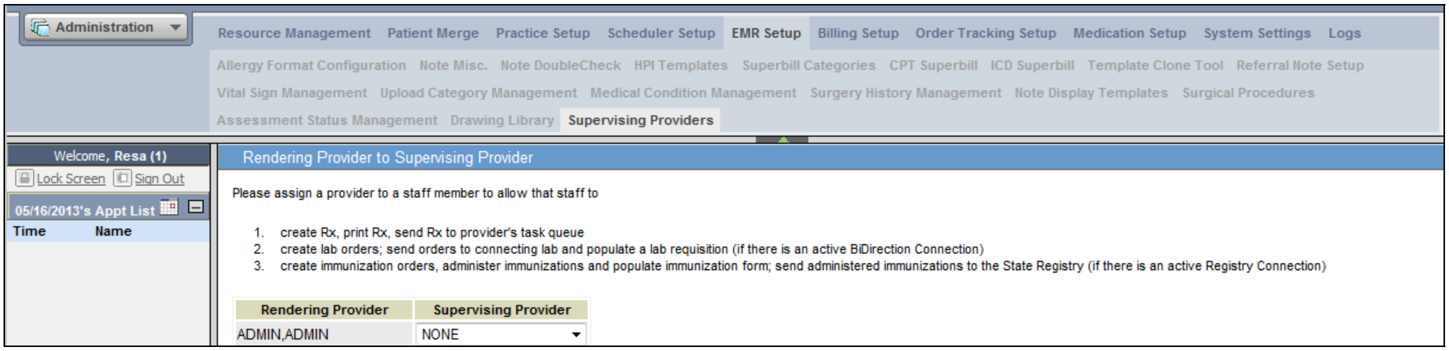
The following **Logs** have been moved from **Administration>Logs** to their respective setup modules, including: **Prescriptions, Refill Requests, Refill Responses, Eligibility, Drug History and Physician Registration.** These logs can now be accessed under **Medication Setup>Medication Management>Transaction Errors**. **Medication Reconciliation Stats** has been moved to **Medication Setup**.




HL7 Order Results have been moved to **Order Tracking Setup>Transaction Errors**. **Bi-Direction Laboratory Connection Messages/Errors** have been moved to **Order Tracking Setup>Lab Requisitions**.



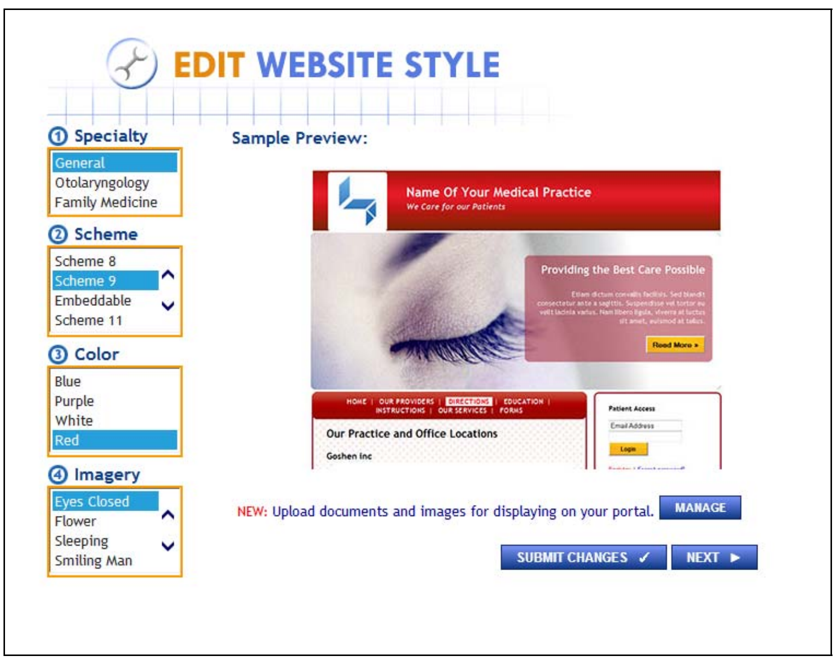

**Supervising Provider** prescribing setup has been moved from **Medication Setup** to **EMR Setup**. Note that this functional is used to associate **Supervising Providers** with staff users, allowing non-prescribing users to create/print/submit prescriptions by sending the prescription information to **Supervising Provider's Task Queue.** This also includes **Laboratory Order Creation, Bi-Directional Lab** submissions and the creation, administration and printing of **Immunization Forms** for submission to a **Vaccination Registry.**



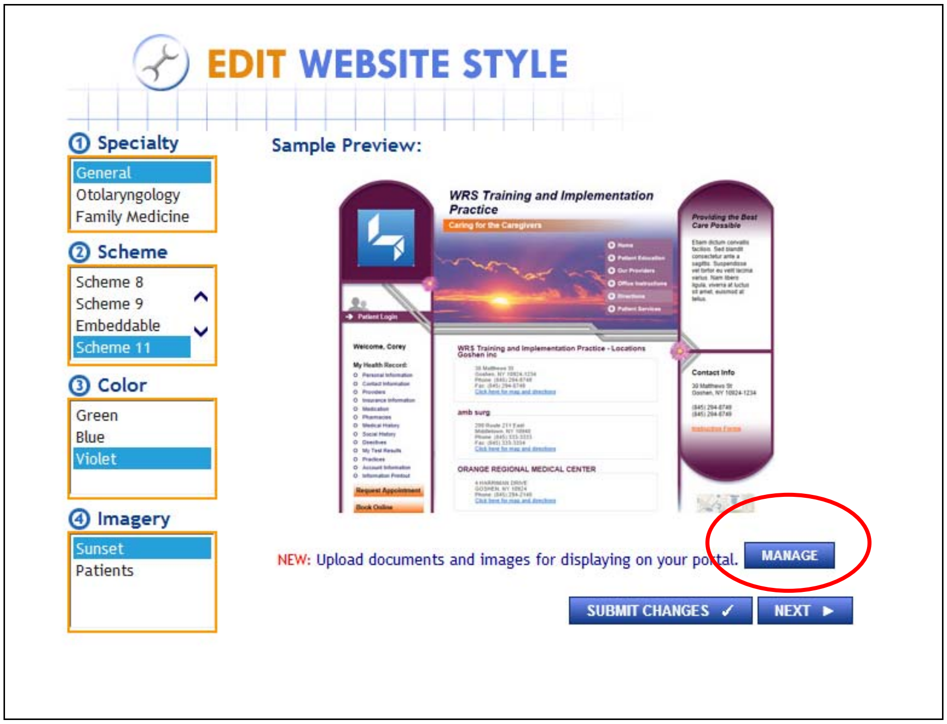

## ENHANCEMENTS TO PRACTICE WEBSITE FUNCTIONALITY

Several new controls and options have been added to the **Administration>Practice Setup>Edit Practice Info** and other website setup screens.

**<u>Style Selection</u> –** Users now have access to additional website “skins” and styles under **Admin>Practice Setup>Edit Website Style.** Menus have been reorganized to allow users the ability to more conveniently select **Specialty, Scheme, Color,** and **Imagery**. Pressing **Submit Changes** will automatically update the website. Changes can be viewed under **Administration>Practice Setup>View Website:**




**<u>Uploading Images</u>** – Functionality has been added to include practice-specific images to content fields. Under **Administration>Practice Setup>Edit Website Style** an option has been added to allow practices to upload documents and images for display on the website (i.e. exterior of office, images of staff). To upload documents and insert them into the **About Us** section, click **Manage under Admin>Practice Setup>Edit Website Style:**

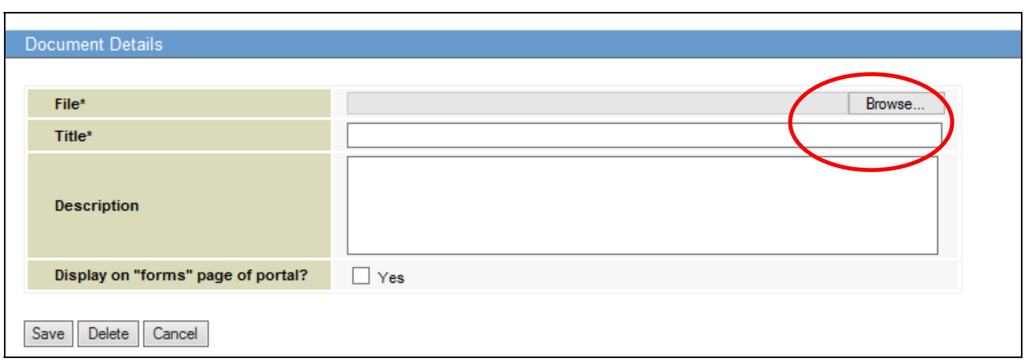



Clicking **Manage** will bring you to **Administration>Practice Setup>Practice Documents**. Select **Add New** to add a file for upload:

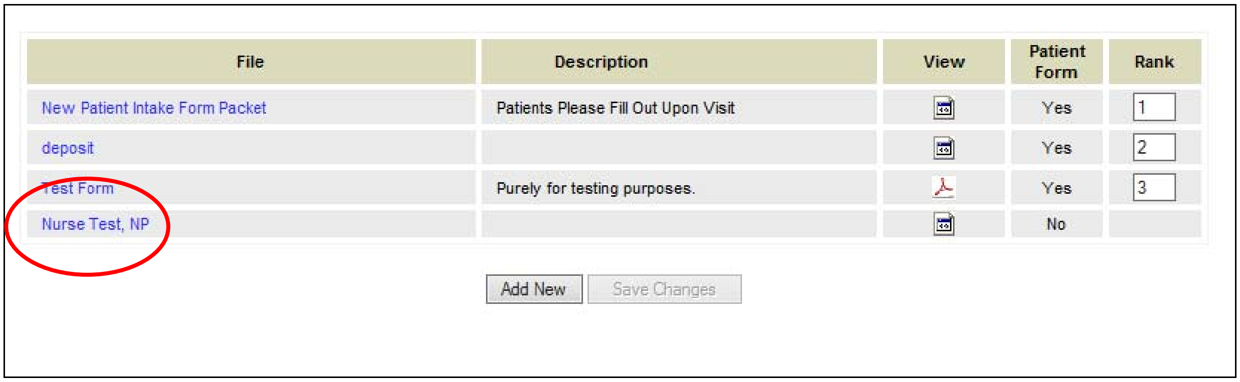
| File | Description | View | Patient Form | Rank |
|---|---|---|---|---|
| New Patient Intake Form Packet | Patients Please Fill Out Upon Visit | | Yes | 1 |
| deposit | | | Yes | 2 |
| Test Form | Purely for testing purposes. | | Yes | 3 |

Add New Save Changes

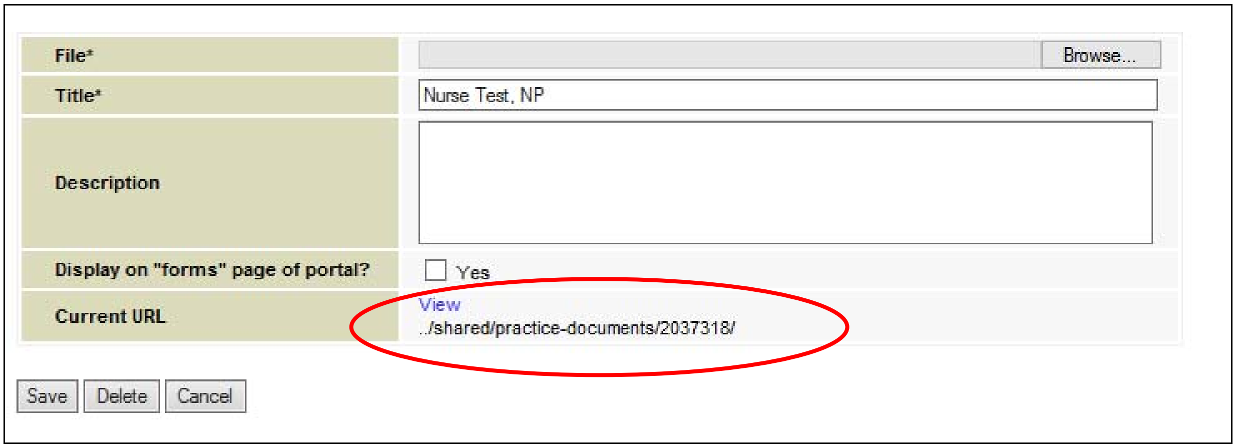
The user then selects **Browse** and enters a **Title.** If this is a practice form and not an image, the user should select **Display on "forms" page of portal.** The user then presses **Save** to upload the file to the website:



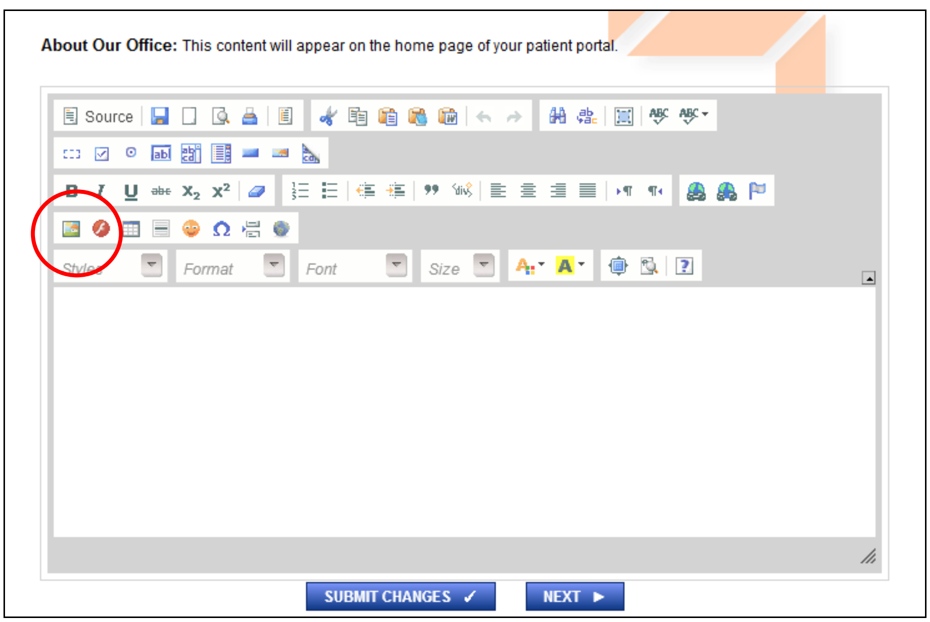

The uploaded image will display in the **Practice Documents List**:



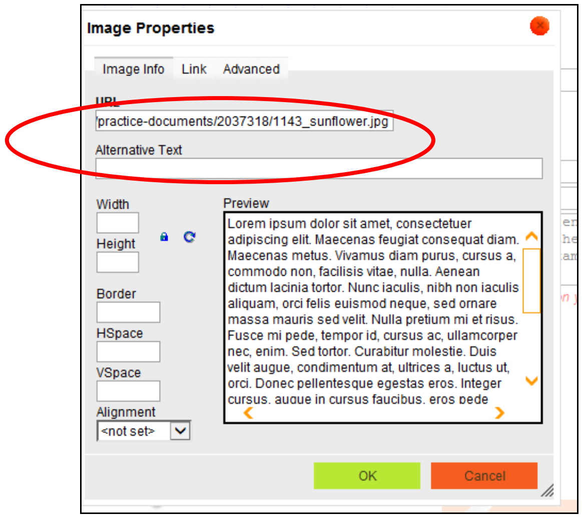

Clicking **Nurse Test NP** will allow you to view the **Current URL:**



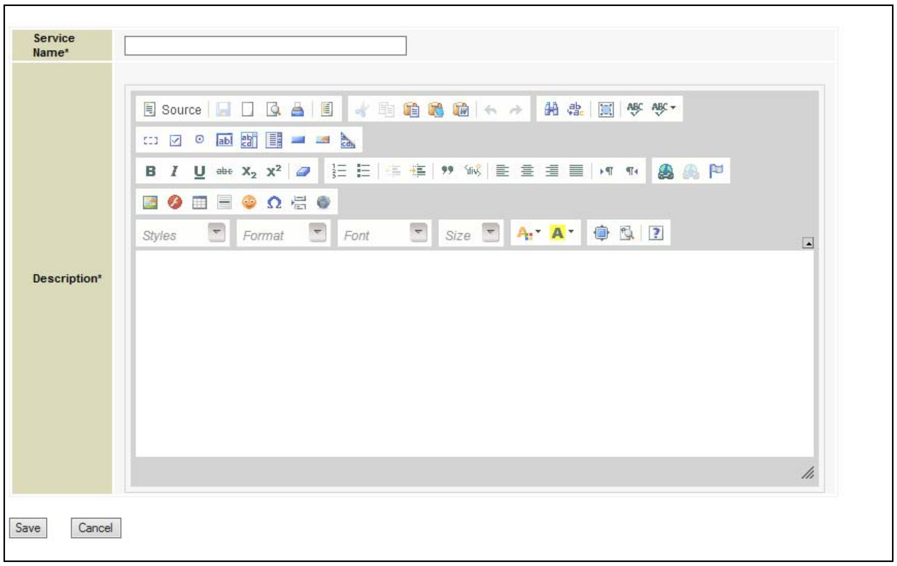

Copy current URL by highlighting, right click, copy. Go to **Administration>Practice Setup>Edit Practice Info**. Scroll down to **About our Office**. Select the **Image** button on the **Editor Toolbar**:



This will prompt an **Image properties** box to open. Paste image link into **URL**:



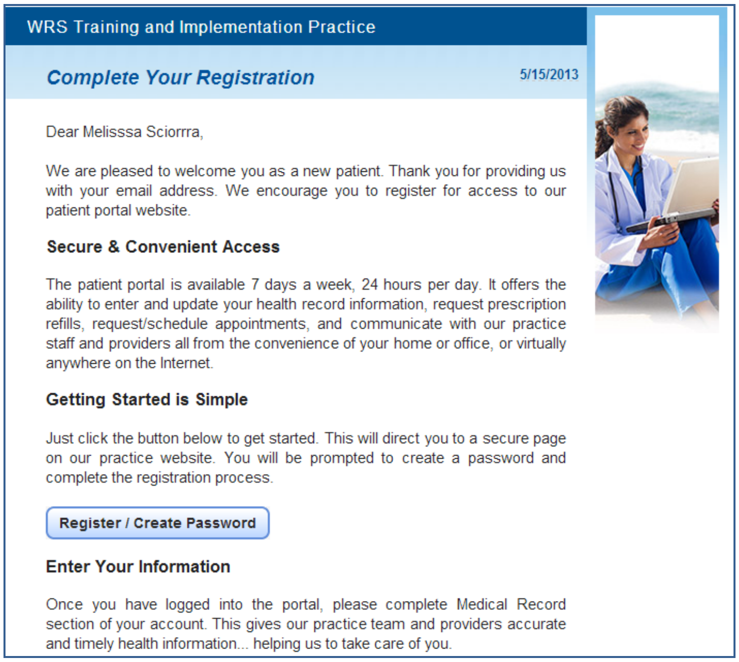

Entering the **Width** and **Height** (optional) will resize the image. Press **OK** to enter the image into content section:




**UPDATE TO PRACTICE EMAIL TEMPLATES**

Modifications have been made to the automated **Welcome Email** that is sent to all new patients upon registration (patient email address required). The information and design of this automated email have been optimized to further increase registration and usage of the portal by your patients.

The **Welcome Email** message now offers additional details about secure and convenient access to the **Patient Portal Website**. When the patient clicks **Register/Create Password** button, they be prompted to create a password and login to the portal using their email address and password combination.



WRS Training and Implementation Practice

*Complete Your Registration* 5/15/2013

Dear Melisssa Sciorrra,

We are pleased to welcome you as a new patient. Thank you for providing us with your email address. We encourage you to register for access to our patient portal website.

**Secure & Convenient Access**

The patient portal is available 7 days a week, 24 hours per day. It offers the ability to enter and update your health record information, request prescription refills, request/schedule appointments, and communicate with our practice staff and providers all from the convenience of your home or office, or virtually anywhere on the Internet.

**Getting Started is Simple**

Just click the button below to get started. This will direct you to a secure page on our practice website. You will be prompted to create a password and complete the registration process.

Register / Create Password

**Enter Your Information**

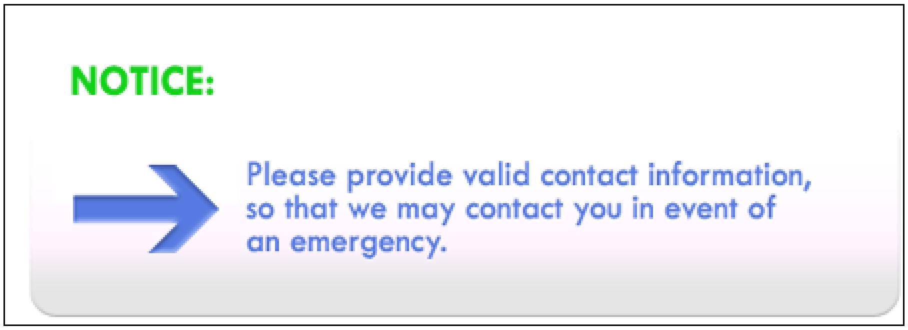
Once you have logged into the portal, please complete Medical Record section of your account. This gives our practice team and providers accurate and timely health information... helping us to take care of you.

## UPDATES TO PATIENT PORTAL

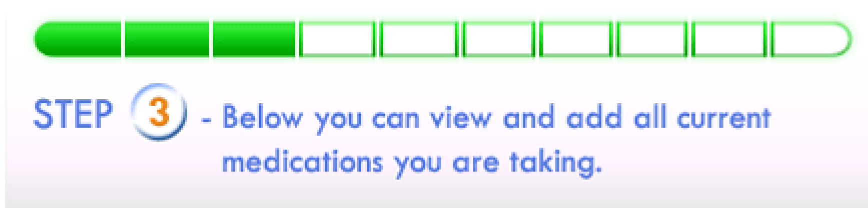
WRS has redesigned the interface of the Patient Portal in order to encourage patients to more fully enter data and contribute to an accurate medical record for your practice.

A **Completion Rating Scale** has been added to each section of the patient portal. Items will display green at 100% completeness, yellow at 50% completeness, and red at 0% completeness. When a patient logs in, or registers on the patient portal, they will easily be able to identify and complete any areas that need update based upon the color and percentage. All information is automatically transferred to **Patient Management** and the **EMR** for practice use.

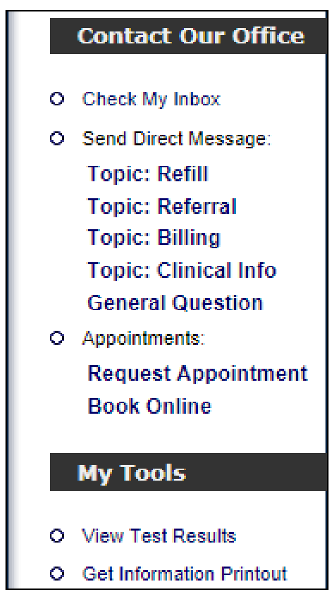
Functionality has also been added to display a notice on each section of portal in order to convey the importance of the data that the patient is being asked to enter:




A visual representation of “steps” to completion is also displayed:




Patients can view **Messaging** and **Inbox** options in a convenient new display box. If the practice has the optional functionality of **Online Appointment Booking** and **View Lab Results** enabled, this will also be displayed.




Note that if you are interested in activating these features, please contact your account representative directly or email: accountmanagement@wrshealth.com.