



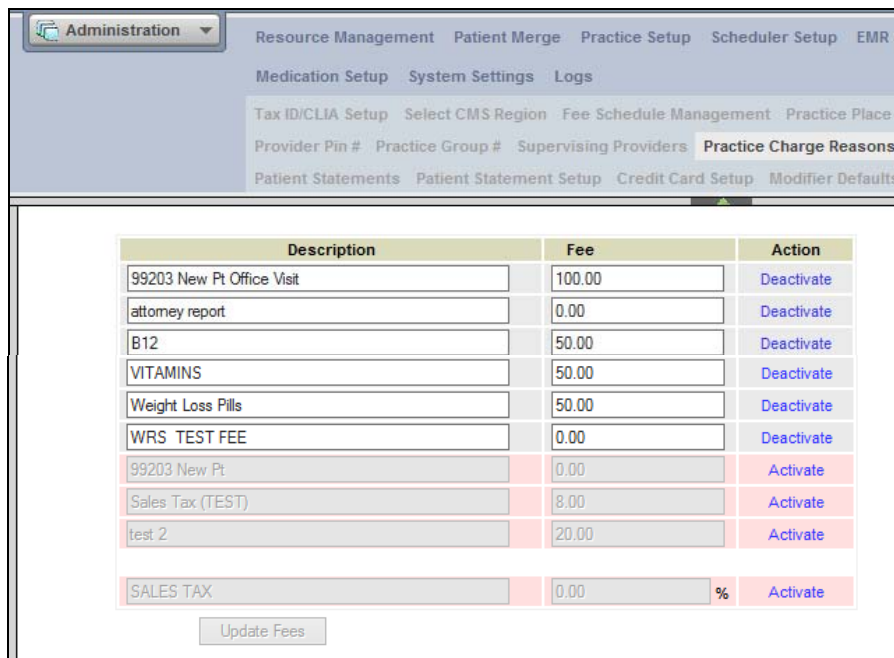
To: All WRS Users
From: WRS Development Team
Date: 05/17/2013
Re: Update to Waiting Room Solutions System

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

Update Fees

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

SALES TAX 10.00 % Deactivate

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:

Charge Patient for Miscellaneous Fee

DO NOT ENTER OR POST PAYMENTS IN THIS BOX

Create Charge: 50.00

Reason: Weight Loss Pills

Date: 5/16/2013

Sales Tax: 5

Charge Patient

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:

Post Payment / Co-Payment To Account

Payment Amount: 155

Payment Type: Cash

Co-Payment Amount To Be Charged: 100

Apply To Miscellaneous Charge:

Post Payment

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

Post Payment to Past Charges

PAYMENT AMOUNT \$155.00

REMAINING BALANCE \$55.00

PATIENT CHARGES

DATE OF CHARGE	CHARGE REASON	CHARGE AMOUNT	PAYMENT AMOUNT
05/16/2013	Weight Loss Pills	\$50.00	
05/16/2013	SALES TAX	\$5.00	

Submit

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:

Create New Report

REPORT NAME	SALES TAX
ACTIVITY/AGING/MISC	Miscellaneous ▼
REPORT INTERVAL	Once ▼
REPORT TYPE	Charge ▼
CHARGE TYPE	All ▼
CHARGE DATE RANGE	5/1/2013 [calendar] -- 5/16/2013 [calendar] <input type="radio"/> TODAY <input checked="" type="radio"/> MONTH TO DATE <input type="radio"/> LAST MONTH <input type="radio"/> YEAR TO DATE
PAYMENT DATE RANGE	5/1/2013 [calendar] -- 5/16/2013 [calendar] <input type="radio"/> TODAY <input checked="" type="radio"/> MONTH TO DATE <input type="radio"/> LAST MONTH <input type="radio"/> YEAR TO DATE

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

Print Filters?

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

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.

Add New Insurance

Is the patient the insurance policy holder?
 Yes No

Please select the option that describes your insurance plan

Medicare (Non-managed care)
 Medicaid (Non-managed care)
 Other

PO Box Number /
 Street Address
 Zip -
 Insurance Name
 Phone Number - -
 Payor ID
 Package ID

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.**

The screenshot shows the 'Transaction Error Search' interface. The top navigation bar includes 'Administration', 'Resource Management', 'Patient Merge', 'Practice Setup', 'Scheduler Setup', 'EMR Setup', 'Billing Setup', 'Order Tracking Setup', 'Medication Setup', 'System Settings', and 'Logs'. The 'Medication Setup' module is active, with sub-tabs for 'Medication Management', 'Medication Settings', 'Reports', and 'Medication Reconciliation Stats'. The 'Transaction Error Search' form includes the following fields: Patient (Any), Message Status (All), Transaction Date (5/2/2013 to 5/16/2013), and Employee (Any). A 'Search' button is located at the bottom of the form.

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.**

The screenshot shows the 'Transaction Error Search' interface within the 'Order Tracking Setup' module. The top navigation bar is the same as in the previous screenshot, but the 'Order Tracking Setup' module is active, with sub-tabs for 'Edit Messages', 'Edit Practice OTS Settings', 'Edit Practice Panels', 'Health Maintenance', 'Record Reminder Messages', 'Order Set', 'Transaction Errors', and 'Messages Sent To Lab'. The 'Transaction Error Search' form includes the following fields: Active Status (All) and Error Date (5/2/2013 to 5/16/2013). A 'Search' button is located at the bottom of the form.

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

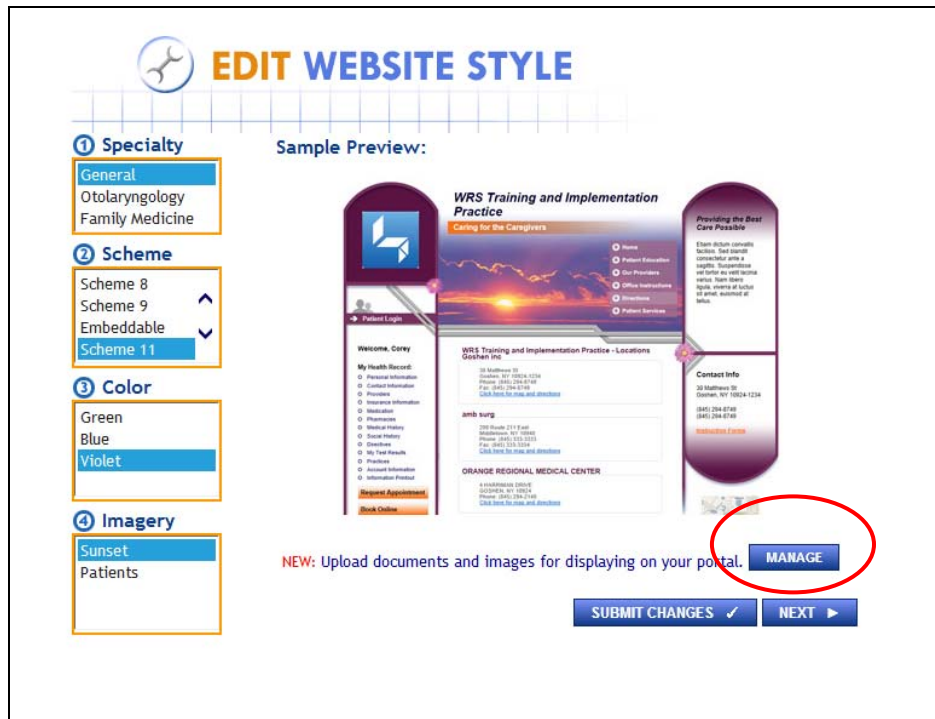
create/print/submit prescriptions by sending the prescription information to **Supervising Provider's Task Queue**. This also includes **Laboratory Order Creation, Bi-Directional Lab** submissions and the creation, administration and printing of **Immunization Forms** for submission to a **Vaccination 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.

Style Selection – 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**:

Uploading Images – 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	<input type="text" value="1"/>
deposit			Yes	<input type="text" value="2"/>
Test Form	Purely for testing purposes.		Yes	<input type="text" value="3"/>

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:

Document Details

File*	<input type="text"/>
Title*	<input type="text"/>
Description	<input type="text"/>
Display on "forms" page of portal?	<input type="checkbox"/> Yes

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

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
Nurse Test, NP			No	

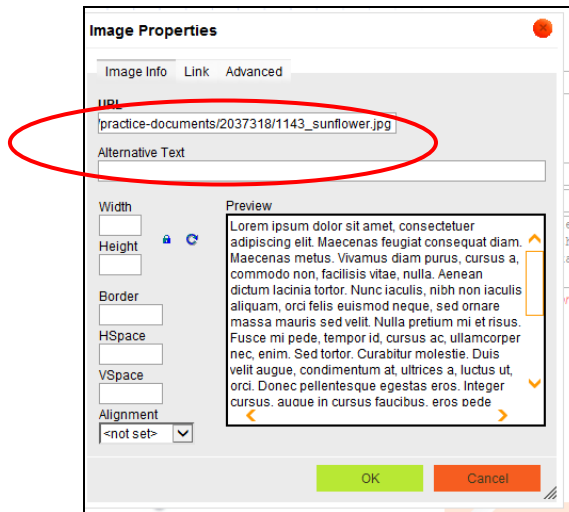
Clicking **Nurse Test NP** will allow you to view the **Current URL**:

File*	<input type="text"/> Browse...
Title*	Nurse Test, NP
Description	<input type="text"/>
Display on "forms" page of portal?	<input type="checkbox"/> Yes
Current URL	View ../shared/practice-documents/2037318/

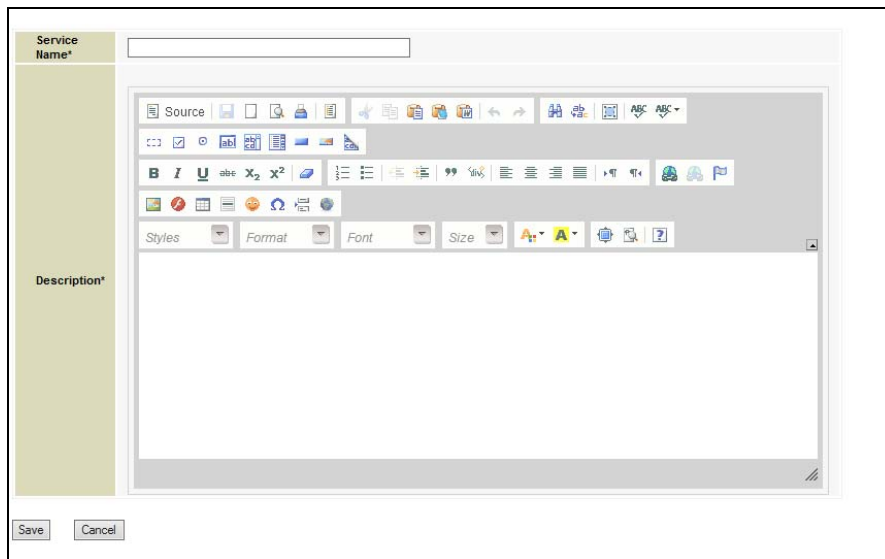
Copy current URL by highlighting, right click, copy. Go to **Administration>Practice Setup>Edit Practice Info**. Scroll down to **About our Office**. Select the **Image** button on the **Editor Toolbar**:

About Our Office: This content will appear on the home page of your patient portal.

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 Melissa Sciorra,

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.



WRS Training and Implementation Practice
Your One Stop Medical Practice

Welcome, Google!

My Medical Record

- Account Email & Password
- Personal Info ● 100%
- Contact Info ● 50%
- Medications ● 0%
- Pharmacies ● 0%
- Medical History ● 0%
- Social History ● 0%
- Insurance Info ● 100%
- My Healthcare Providers ● 0%
- My Practices ● 100%
- Directives ● 0%

Contact Our Office

- Check My Inbox
- Send Direct Message
 - Topic: Refill
 - Topic: Referral
 - Topic: Billing
 - Topic: Clinical Info

NOTICE:

Please provide required personal information, so that your healthcare providers will have accurate information for your care.

Personal Information for Google Chrome

* = Required

This is patient's current Personal Information.

Keep this data up to date by making any necessary changes to each field, and then click the Submit Changes button at the bottom of the page.

This information is kept private, in accordance with state and federal law.

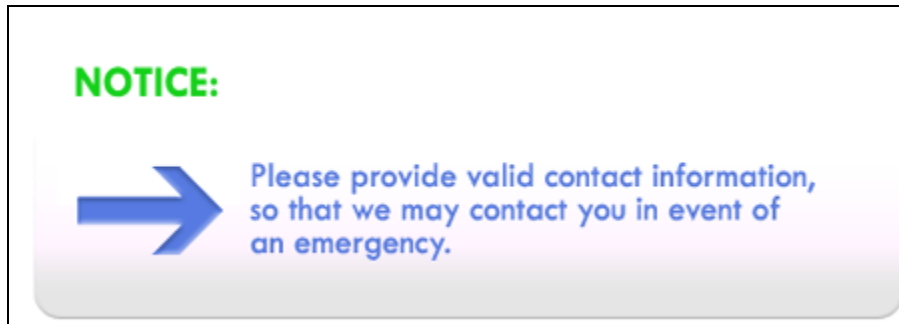
Contact Us

30 Matthews St
Goshen, NY 10924-1234
Phone: (845) 294-8749
Fax: (845) 294-8749

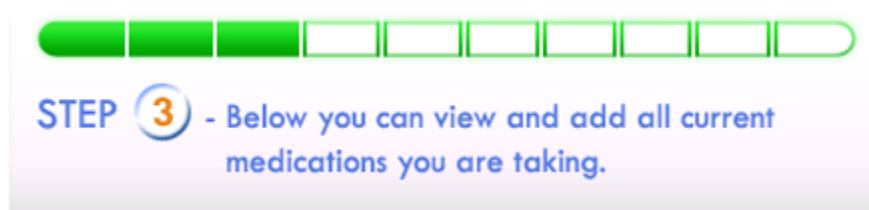
Having trouble finding us?
[Get Directions](#)

Patient must first Accept and/or Acknowledge the following

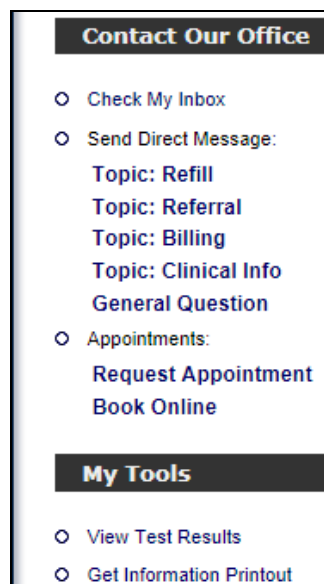
Functionality has also been added to display a notice on each section of portal in order to convey the importance of the data that the patient is being asked to enter:



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.