



Updated on June 23, 2017

**To:** WRS User Community  
**From:** WRS Development Team  
**Date:** 06/23/2017  
**Re:** Software Release

**IMPORTANT NOTE** – Chrome users may experience an “Initializing” error when attempting to first run the new scheduler. To assist in solving this issue, please *clear all cookies* that are saved in your browser history. Here are the steps:

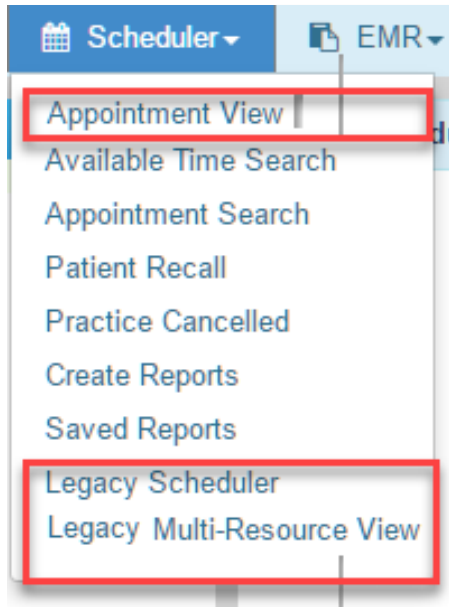
1. Launch Chrome
2. At the top right, click “**More**” and then “**Settings**”
3. At the bottom, click “**Advanced**”
4. Under “**Privacy and Security**” click “**Content Settings**”
5. Click **Cookies**
6. Under “**All Cookies and Site Data,**” click “**Remove All**”
7. Confirm by clicking “**Clear All**”

*(Click Link to View)*

<a href="#">Scheduler Menu</a>
<a href="#">Multi-Provider View</a>
<a href="#">Drag n’ Drop</a>
<a href="#">Zoom In &amp; Out</a>
<a href="#">Rescheduling</a>
<a href="#">Print &amp; Calendar Icons</a>
<a href="#">Appointment Details</a>
<a href="#">Schedule Filters</a>
<a href="#">Appointment Pop-up</a>
<a href="#">Scheduler Preferences</a>

# Scheduler - Menu

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Please note that the existing (old) scheduler still remains available under **Scheduler>Legacy Appointment View** and **Legacy Multi-Resource View**.

We encourage all clients transition to the new scheduler immediately since we plan to sunset the “old” scheduler in the near future.

# Multi-Provider View (Daily & Weekly)

Tue 5/2	Wed 5/3	Thu 5/4	
9:00 - 9:30 MINDY BOY FIRST PAT	9:00 - 9:15 DEANNA TE DT	Any	Any
Any	Any	Any	Any
Any	Any	Any	Any
Any	Any	Any	Any
Any	Any	Any	Any
10:45 - 11:00 MINDY FIRS PT	10:50 - 11:20 VIVICA FOX	Any	Any
11:00 - 11:15 CANDICE TE PT	Any	11:00 - 11:15 ZOEY TEST PT	Any
11:15 - 11:30 DAISY TEST PT	Any	11:15 - 11:30 DAKOTA TEST PT	Any
Any	Any	Any	Any

Any combination of Provider and Non-Human Resource schedules can be viewed in the Daily and Weekly Views.

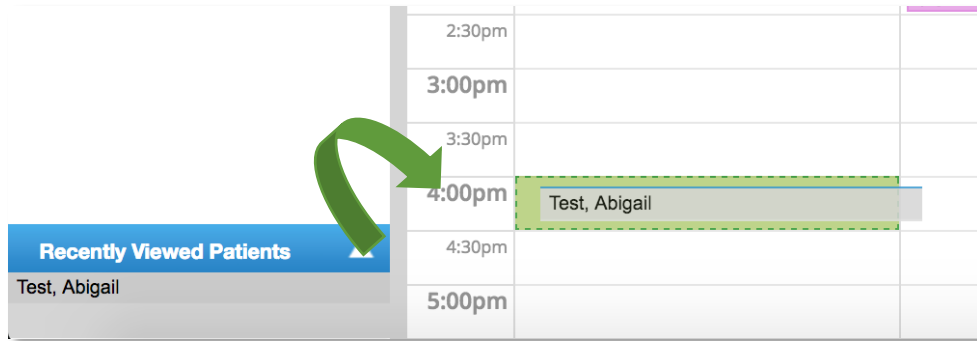
- Schedules can be filtered by Appointment Type and Practice Location.
- Possible Appointment Types are listed within each available appointment slot. Hide these under **Admin>Scheduler Setup>Scheduler Display**

## Workflow:

1. Toggle between views using the Day, Week, and Current Week buttons in the Header Bar
2. Open and collapse your options by clicking on **Filters**. Select your desired criteria.

Goshen				
	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
12:50pm	Any	Established Patient	Any	Any

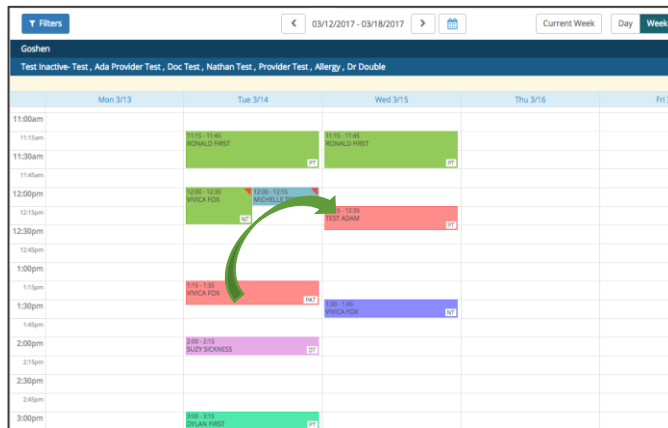
# Drag n' Drop - Patients & Appointments



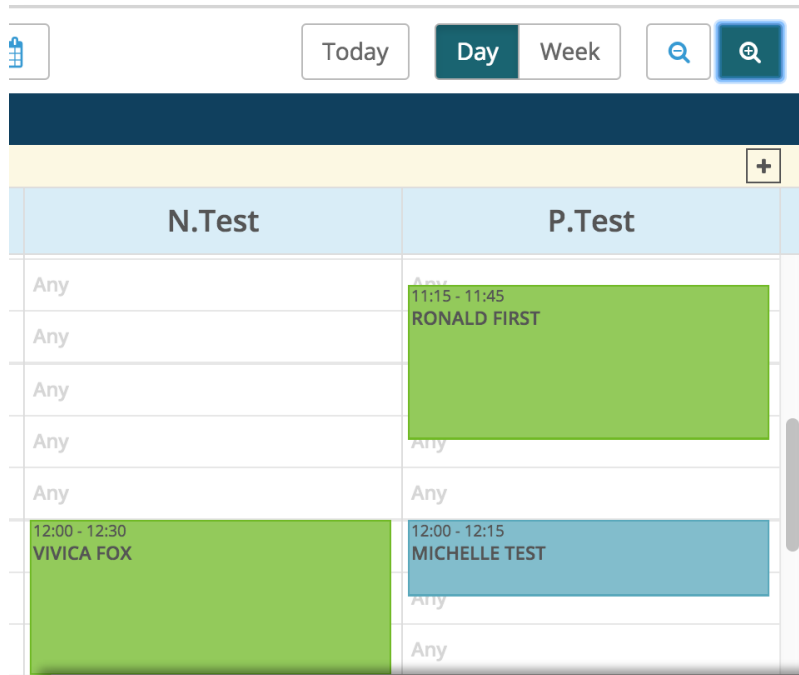
Patient names can be dragged from Recently Viewed Patients and Today's Appointments into the Scheduler. Appointments can also be dragged and dropped between slots in the Scheduler View.

## 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

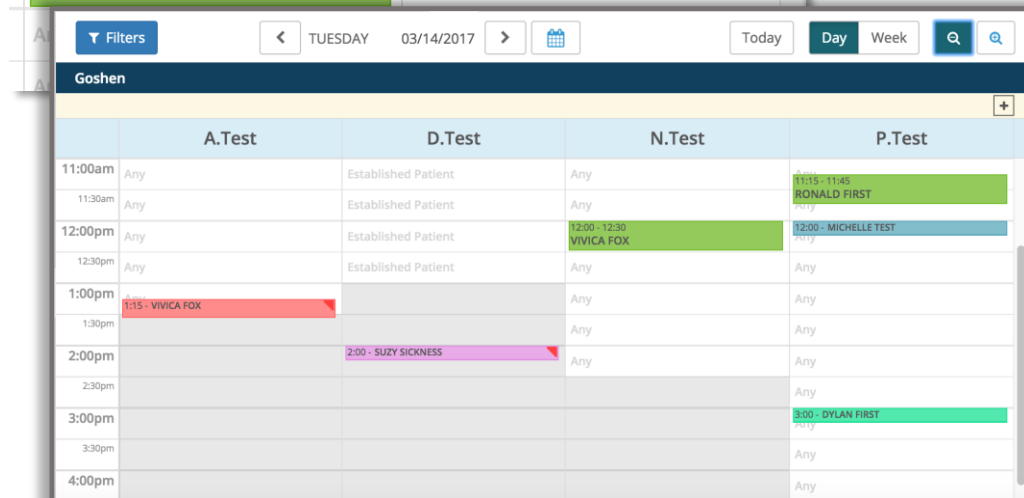


New Zoom In and Zoom Out buttons have been added to all scheduler windows.

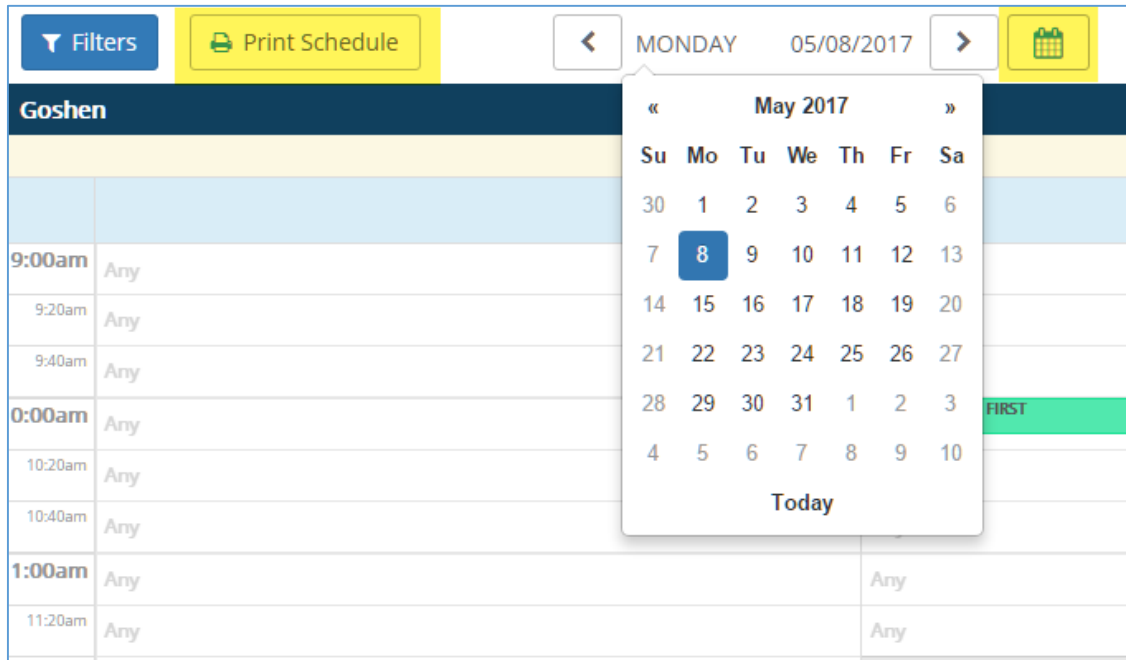
Pressing these easy-access buttons makes your view temporarily larger or smaller.

## 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 & Print Icons



The screenshot shows a scheduler interface for 'Goshen'. At the top, there is a 'Filters' button, a 'Print Schedule' button, and a header area displaying 'MONDAY 05/08/2017' with navigation arrows and a calendar icon. A calendar pop-up is open, showing 'May 2017' with the 8th highlighted. The scheduler table below has columns for time slots and 'Any' entries. A 'FIRST' label is visible in the right margin.

Time Slot	Any
9:00am	Any
9:20am	Any
9:40am	Any
0:00am	Any
10:20am	Any
10:40am	Any
1:00am	Any
11:20am	Any

New Calendar and Print Icons have been added to the scheduler window. Pressing these icons allow you to quickly Navigate to an upcoming date and print the current schedule view.

## Workflow:

1. Click on the **Calendar Icon** in the header to view the calendar
2. Click on the **Print Icon** to print the current scheduler view with applied filter choices.

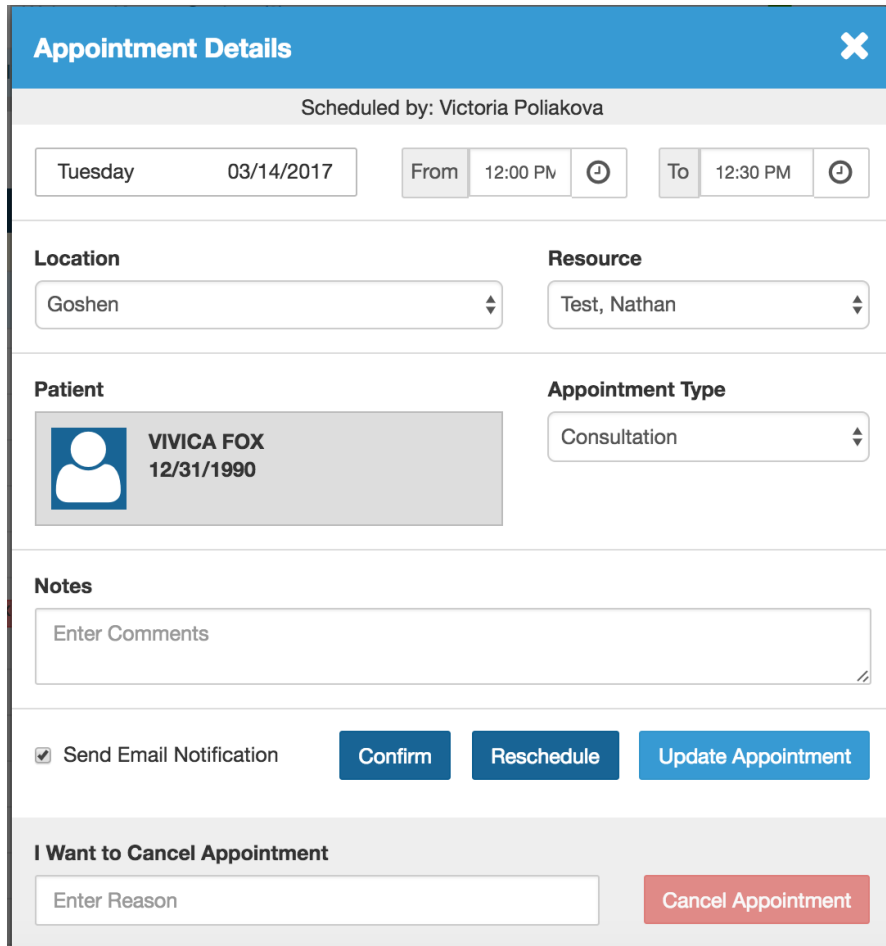


Calendar Icon

 Print Schedule

Print Icon

# Rescheduling Appointments



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 and Time:** Tuesday, 03/14/2017. From 12:00 PM to 12:30 PM. Each time field has a clock icon for selection.
- 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 checked checkbox for "Send Email Notification" 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** 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 Detail

## 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:

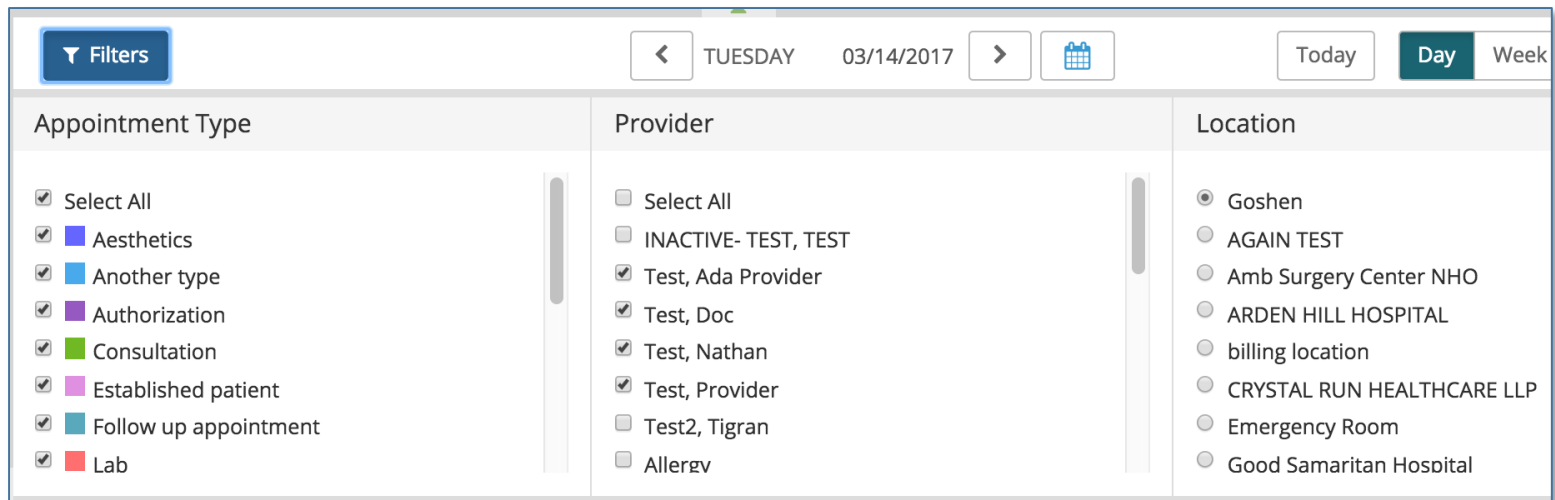
1. View the new dialog boxes by clicking on a scheduled patient
2. The Appointment Details Box will appear
3. View or edit the details including name, date & time, location, provider and notes. From here, you can also Reschedule and Cancel appointments



# Scheduling Filters

New filtering tools allow the easy display of

**Providers, Appointment Types, and Practice Locations.**



The screenshot shows a scheduling interface with a 'Filters' button in the top left. The main area is divided into three columns: Appointment Type, Provider, and Location. Each column has a 'Select All' checkbox and a list of items with checkboxes. The Appointment Type column has 8 items, the Provider column has 7 items, and the Location column has 9 items. The date is TUESDAY 03/14/2017, and the view is set to 'Day'.

Appointment Type	Provider	Location
<input checked="" type="checkbox"/> Select All	<input type="checkbox"/> Select All	<input checked="" type="radio"/> Goshen
<input checked="" type="checkbox"/> Aesthetics	<input type="checkbox"/> INACTIVE- TEST, TEST	<input type="radio"/> AGAIN TEST
<input checked="" type="checkbox"/> Another type	<input checked="" type="checkbox"/> Test, Ada Provider	<input type="radio"/> Amb Surgery Center NHO
<input checked="" type="checkbox"/> Authorization	<input checked="" type="checkbox"/> Test, Doc	<input type="radio"/> ARDEN HILL HOSPITAL
<input checked="" type="checkbox"/> Consultation	<input checked="" type="checkbox"/> Test, Nathan	<input type="radio"/> billing location
<input checked="" type="checkbox"/> Established patient	<input checked="" type="checkbox"/> Test, Provider	<input type="radio"/> CRYSTAL RUN HEALTHCARE LLP
<input checked="" type="checkbox"/> Follow up appointment	<input type="checkbox"/> Test2, Tigran	<input type="radio"/> Emergency Room
<input checked="" type="checkbox"/> Lab	<input type="checkbox"/> Allerev	<input type="radio"/> Good Samaritan Hospital


## 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

# Appointment Pop-Up Box

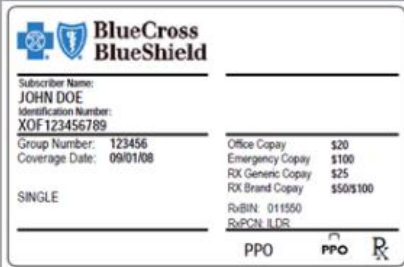
**E** **Appointment Made**

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**

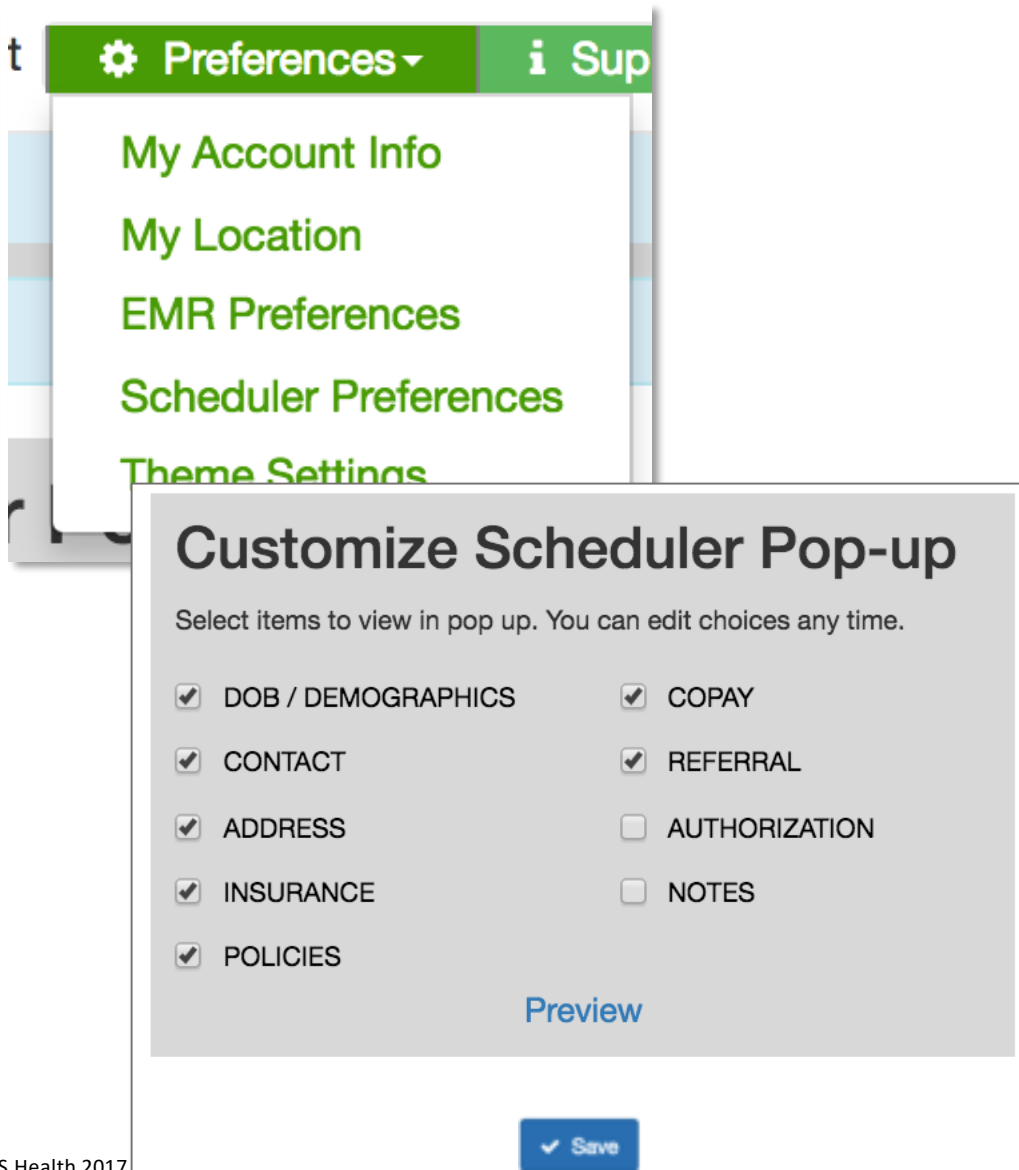
This appointment-specific hover box allows the user to quickly view and collect key data. This is a user-level preference, not a practice setting. To disable this feature, go to **Preferences > Scheduler Preferences** and deselect **Enable Scheduler Popup**.

## 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 Pop-Up 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 Images to Your Appointment Box

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The screenshot shows a mobile application interface for an appointment. At the top, a dark header contains a white 'E' icon and the text 'Appointment Made'. Below this, a light blue bar shows the time '12:15pm - 12:30pm'. The main content area is divided into several sections: a patient profile section with a grey silhouette icon, the name 'Ajax Test', 'DOB 03/01/1956', and '(999)999-9999'; a light blue bar with 'Email Not Available' and a blue 'upload' button circled in green; a light blue bar with the address '123 STREET, GOSHEN NY 12345-1234'; a large grey area with a faded card icon and a blue 'Upload Insurance Card Front' button circled in green; a light blue bar with 'Anthem BCBS | # Test ID' and 'Copay 35\$'; and a final light blue bar with '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

# Scheduler - Visual Enhancements

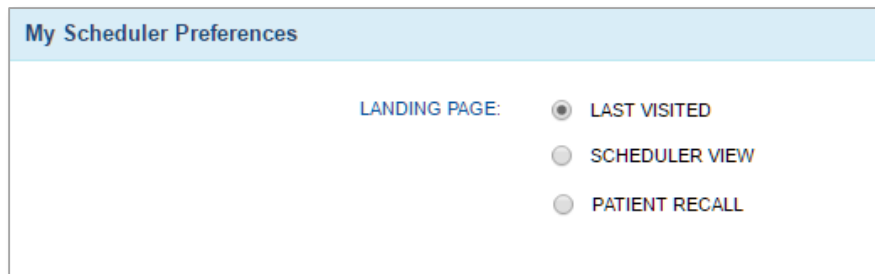
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	Mon 4/3	Tue 4/4
9:00am	Any	9:00 - FOX TEST PT
9:20am	Any	Any
9:40am	Any	Any
10:00am	Any	Any
10:20am	Any	Any
10:40am	Any	10:30 - 11:00 PT RONALD FIRST 10:30 - CEDRIC PT
11:00am	Any	Any
11:20am	Any	Any
11:40am	Any	Any
12:00pm	Any	Any
12:20pm	Any	Any
12:40pm	Any	12:30 - 1:00 PT FOX TEST
1:00pm	Any	Any

1. **Colors:** Muted versions of the colors in your scheduler allow for enhanced visibility. These can be changed under **Admin> Appointment Type Details**
2. **Appointment Labels:** Time blocks are labeled with possible appointments types. Hide these labels in **Admin>Scheduler Setup>Scheduler Display**. Uncheck **Show Appointment Labels**.
3. **Grid:** Additional grid lines and 15-minute time blocks make it easier to schedule and view appointments
4. **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
5. **Header Bar:** Two different background colors makes it easy to distinguish between your location and selected provider.
6. **Provider Initials:** Initials are now included in the appointment slot so that it is easy to identify providers at a glance.

# Scheduler - User Preferences

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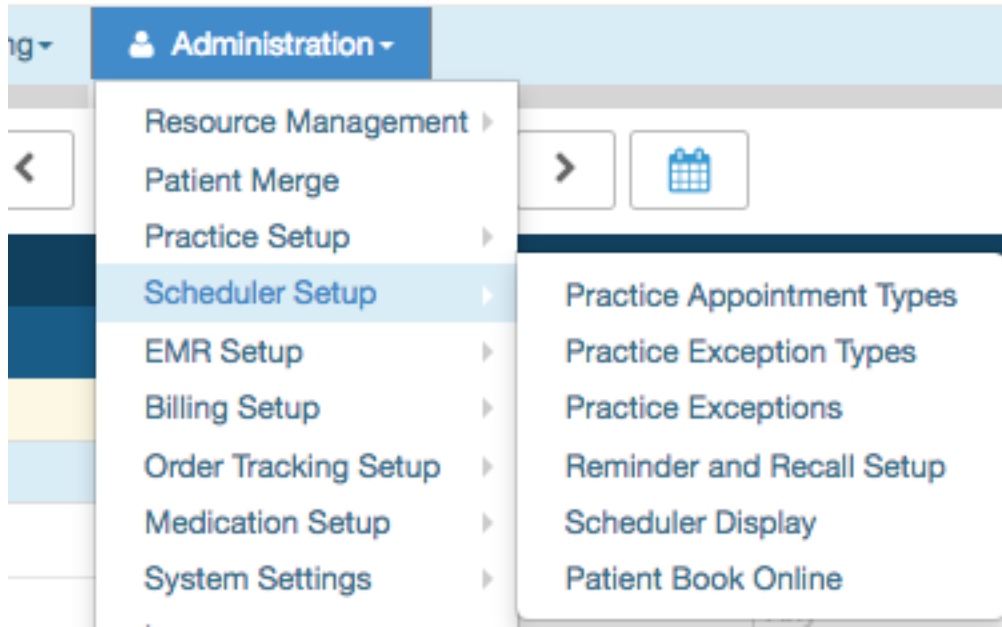
The screenshot shows a dialog box titled "My Scheduler Preferences". Under the heading "LANDING PAGE:", there are three radio button options: "LAST VISITED" (which is selected), "SCHEDULER VIEW", and "PATIENT RECALL".

As a part of this update the ability to specific the **Multi-Resource View** as your default scheduler has been removed. Users with this will now see the new **Appointment View** when they login.

These Preference Settings can be adjusted under **Preferences > My Scheduler Preferences**.

# Scheduler - Setup Changes

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The redesigned scheduler will not alter your existing templates, settings or user preferences.

To make changes to settings for appointment or exception types, go to:

**Admin > Scheduler Setup.**



Please contact  
[support@wrshealth.com](mailto:support@wrshealth.com)  
if you need assistance.

Thank You