To: All WRS Users

From: WRS Development Team

Date: 12/30/11

Re: System Update to Waiting Room Solutions

NEW! CLICK TO VIEW VIDEO RELEASE NOTES

The WRS Development Team will be performing a software update to the Waiting Room Solutions System on or about December 30, 2011. This release will include the following:

Changes to Patient Registration Page **(Click to View Video Release Note 1)**

Enhancements have been made to the Patient Registration page to aid in the collection and entry of data used to create a patient. These include:

- **Time of Birth** and **Birth Time Zone** – will only display if the patient's age is entered as 12 months or less.
- **Birth Time Zone** is no longer a mandatory field.
- **Mandatory Fields (*)** have been grouped together (e.g. **Street, Zip, Password, Email**)
- **Phone Type** now defaults to **Cell**
- **Marital Status** and **Patient Photo** have been moved below required fields on the page

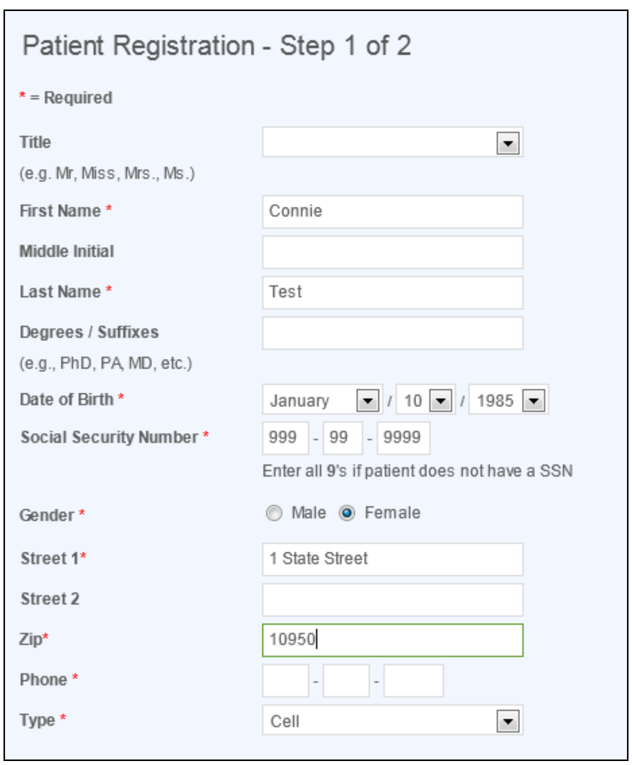


Figure 1: Manage Patients>Patient Registration

Information We're Required to ask has been moved above patient policies to address race, ethnicity, language, occupation, etc.

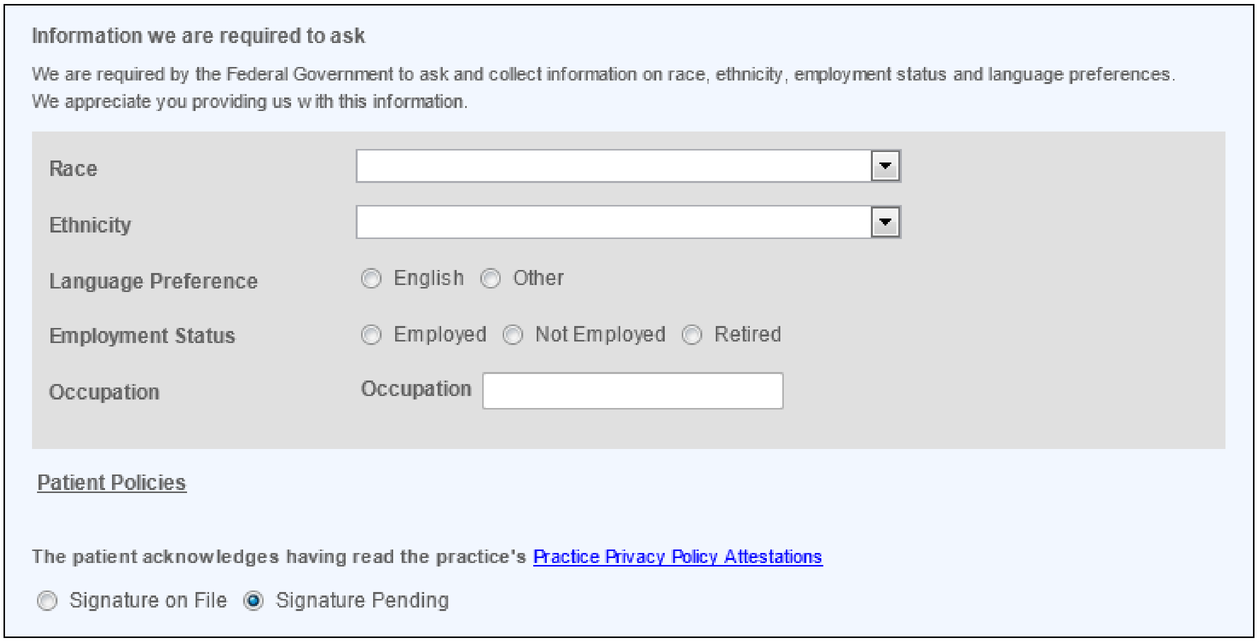


Figure 2: Manage Patients>Patient Registration

Customize Patient Emails **(Click to View Video Release Note 2)**

Functionality to allow the customization of automated practice email messages to patients has been added. This can be accessed under **Administration>System Settings>Patient Email Templates.**

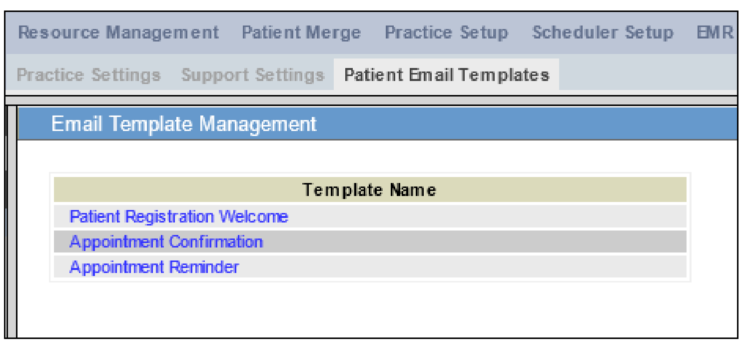


Figure 3: Administration>Practice Settings>Patient Email Templates

Three Email Templates can be selected for customization: **Patient Registration Welcome**, **Appointment Confirmation**, and **Appointment Reminder**. Clicking the **Template Name** will open the Template Editor screen. Customizations can then be made and saved. All emails, for that message type, will now contain this customized content. Templates can be modified and changed by the practice at any time.

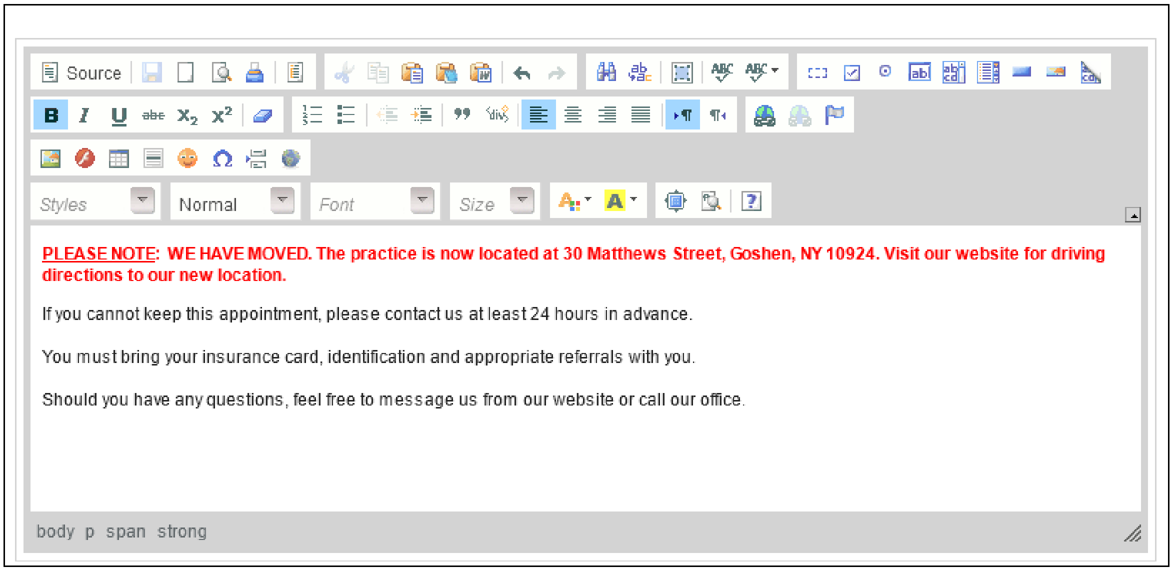


**Figure 4: Administration>Practice Settings>Patient Email Templates>
Patient Appointment Reminder>Template Details**

Specify Appointment Reminder and Schedule Recall Periods (Click to View Video Release Note 2)

Functionality has been added to all the selection timing for **Automated Appointment Reminder Phone Calls & Emails**. Practices can now specify the time period that reminder calls are placed. This can be set anywhere from 1 to 7 days prior to the scheduled appointment date. Under **Administration>Scheduler Setup>Reminder and Recall Setup** the user can select a desired time period (1 to 7 Calendar Days). Automated Reminder Calls will then be performed in advance of the patient's scheduled appointment date.

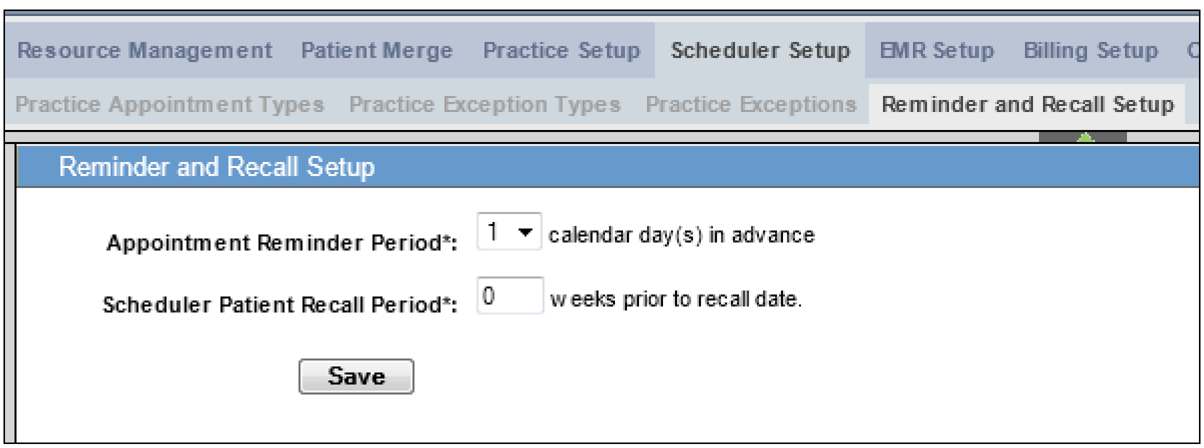


Figure 5: Administration>Scheduler Setup>Reminder and Recall Setup

In addition, practices can set the **Scheduler Patient Recall Period** to notify (recall) the patient within a desired period of weeks before the entered **Recall Date**. <u>**Example**</u> – A patient recall is entered for March 1, 2012. If **"4 weeks prior to recall date"** is specified as the practice default, the patient will receive a phone reminder call/email on February 1, 2012 to contact the office for an appointment.

Scheduler Setup Permission (Click to View Video Release Note 2)

A user level permission has been added for **Scheduler Setup**. This allows practices to enable, or disable, all Scheduler Setup functions for any User ID.

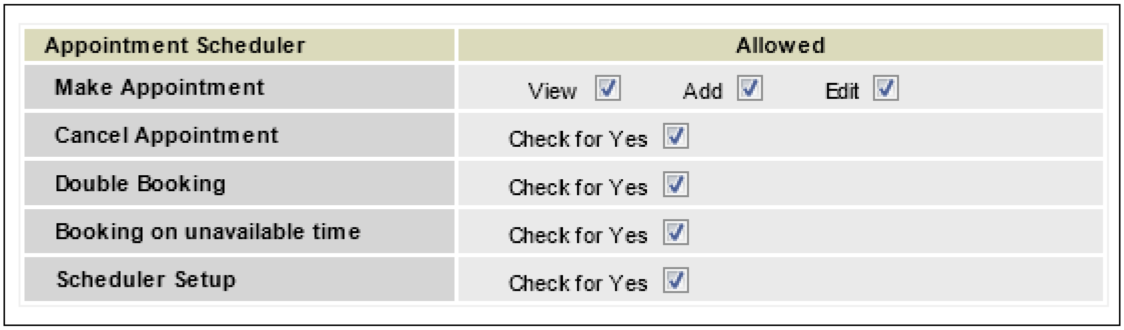


Figure 6: Administration>Resource Management>Resource Setup> USER ID>Permissions> Scheduler Setup

Patient Portal Login Enhancements (Click to View Video Release Note 3)

The patient login password system has been updated to increase usability and efficiently for patients and encourage patient usage of the Patient Portal Website. These changes concern Patient Login IDs, email addresses and password reset. The following scenarios are presented as examples of the new functionality:

Registering a New Patient in the WRS System with Email Address –Under **Patient Management>Patient Registration>Email** enter the patient's email address. This will now become the patient's Portal Login ID.

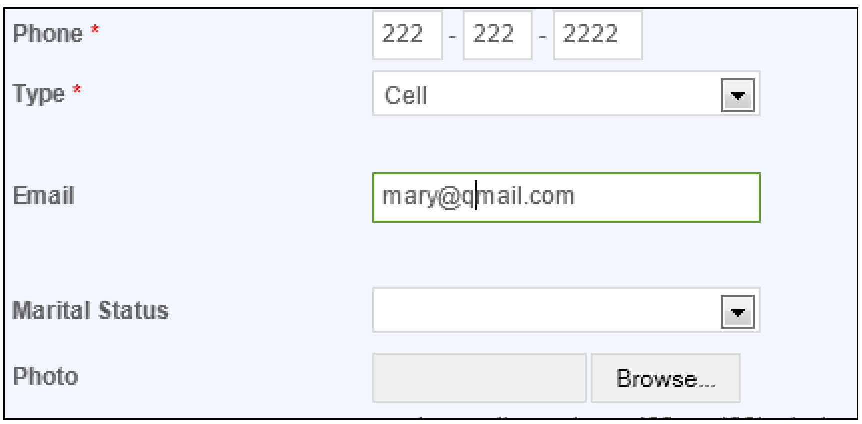


Figure 7: Manage Patients>Patient Registration>Email

<u>**Note**</u>: The system will no longer ask you to enter a password for a patient during registration. The patient will receive an e-mail that contains a link with instructions on how to setup their own unique password.

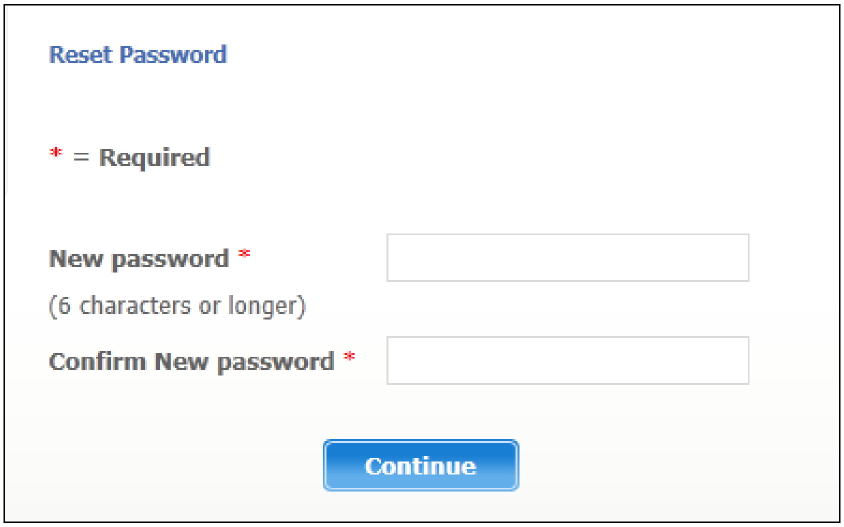


Figure 8: Password Reset Email

<u>NOTE</u>: Each patient MUST have a unique email address. The same email address cannot be used for two patients within the same practice. If an email entered that has already been used for another patient an error message will be displayed.

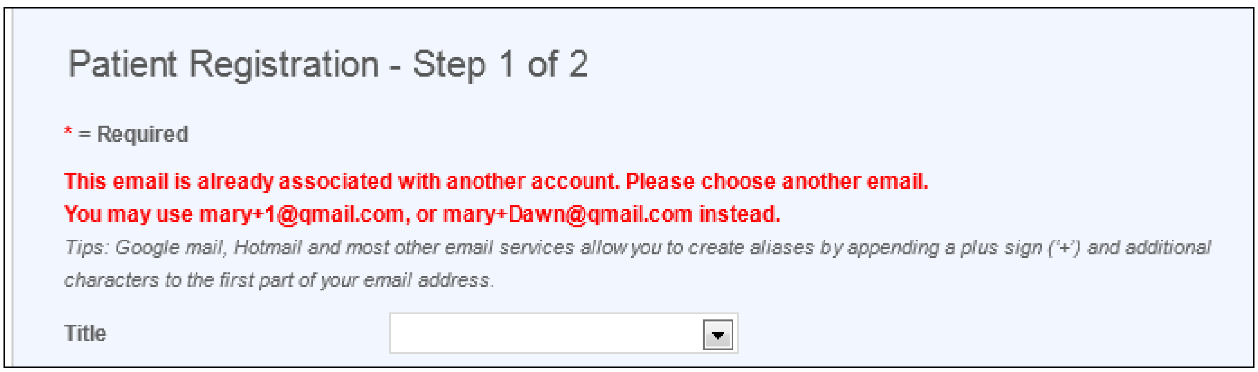


Figure 8: Manage Patients>Patient Registration>Duplicate Email

Creating a Unique Email Address - It is suggested that you add a +1 (or any other characters) to the email name. This will identify the user email as a unique ID and will still direct email to that patient's original email address. This method can be useful when registering patients within the same family that may share a single email address

Example: Mother is patient "Mary Test" registered with email "mary@qmail.com". The practice then registers daughter "Dawn Test" as a patient. Since they cannot use the original email "mary@qmail.com" again, they would simply create another email "mary+1@qmail.com." WRS will then send emails to "mary+1@qmail.com" and they will be received on the "mary@qmail.com" account.

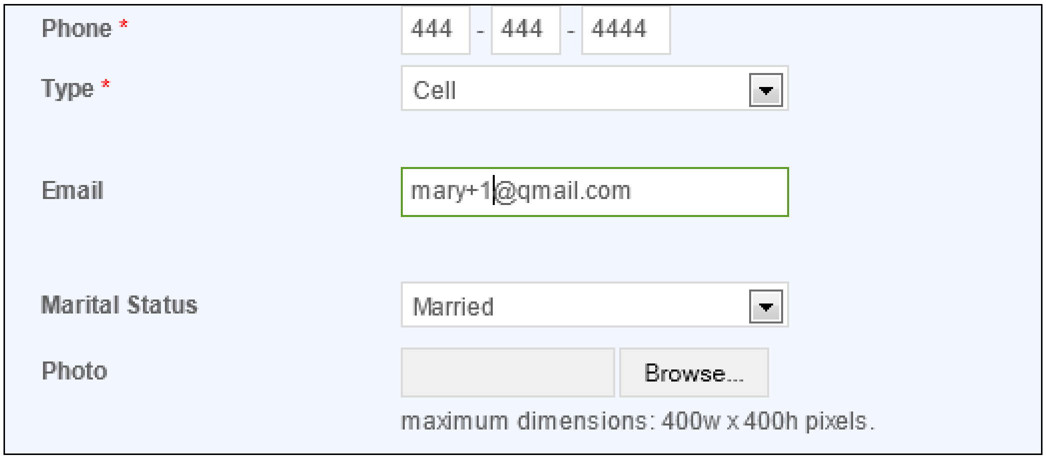


Figure 9: Manage Patients>Patient Registration>Duplicate Email

Registering a New Patient <u>without</u> Email Address– Alternately, practice users have the option to leave the **Email** field blank.

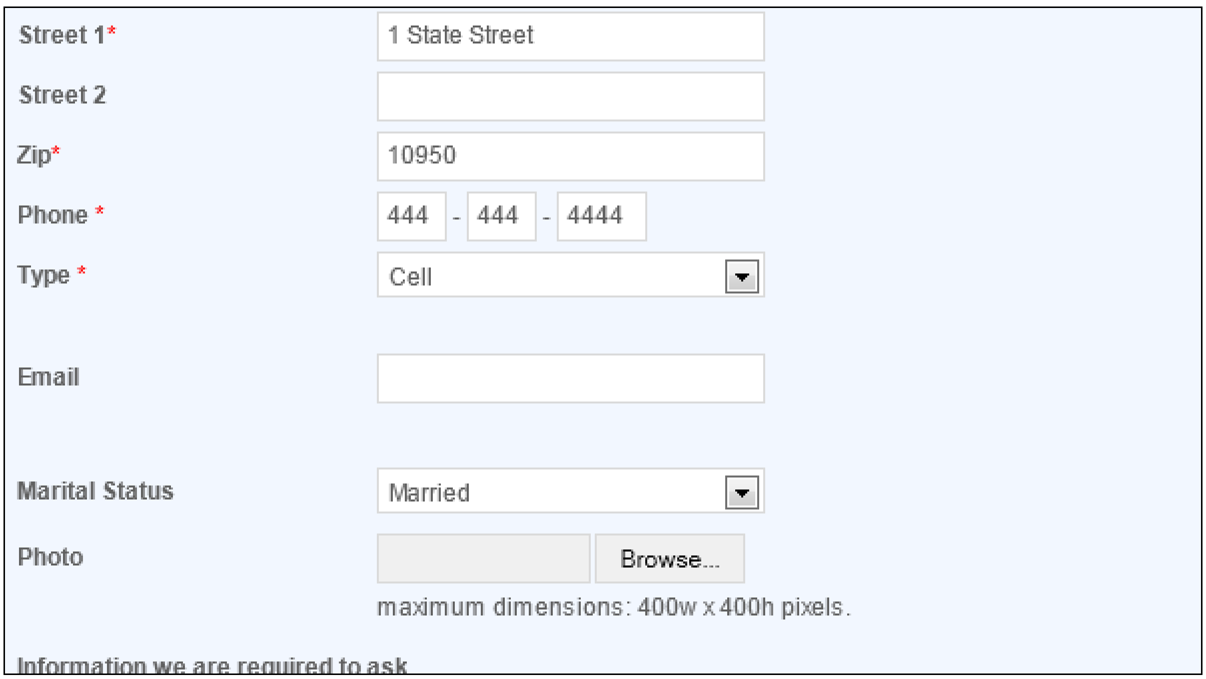


Figure 10: Manage Patients>Patient Registration>Email

Updating a Patient Account in the WRS System – The message below will be displayed Under **Patient Management>Account Information**, if the patient has not yet updated their Portal Login to an email address. The practice can update the email address for the patient here, as well.

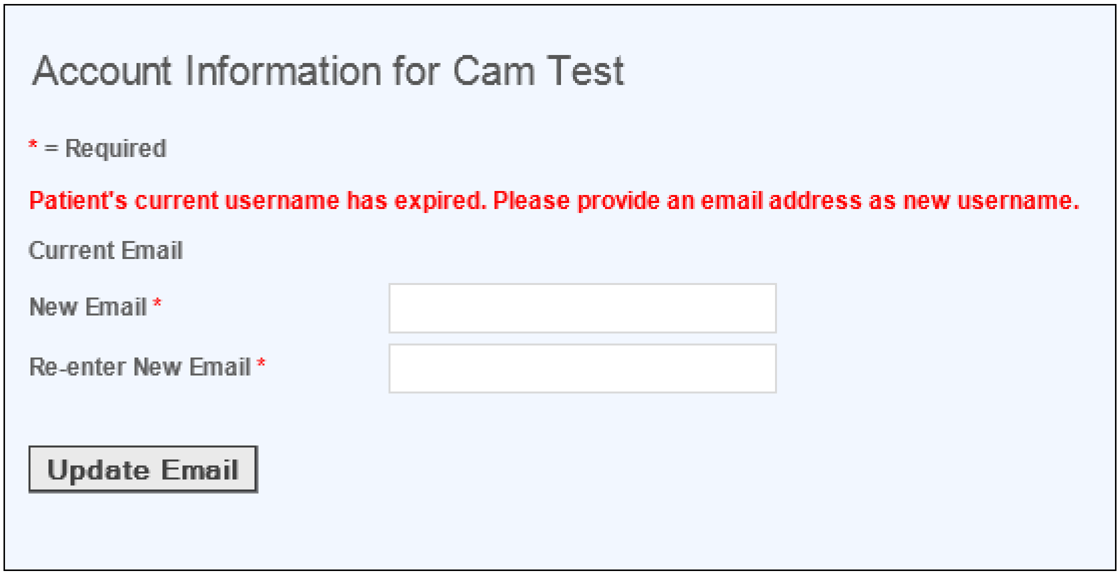


Figure 11: Manage Patients>Account Information>Email Update

Patient Portal Website Login and Password Changes **(Click to View Video Release Note 4)**

If a patient visits the Patient Portal Website and registers directly, they will be required to enter an email address. This email address will now become their Portal Login ID.

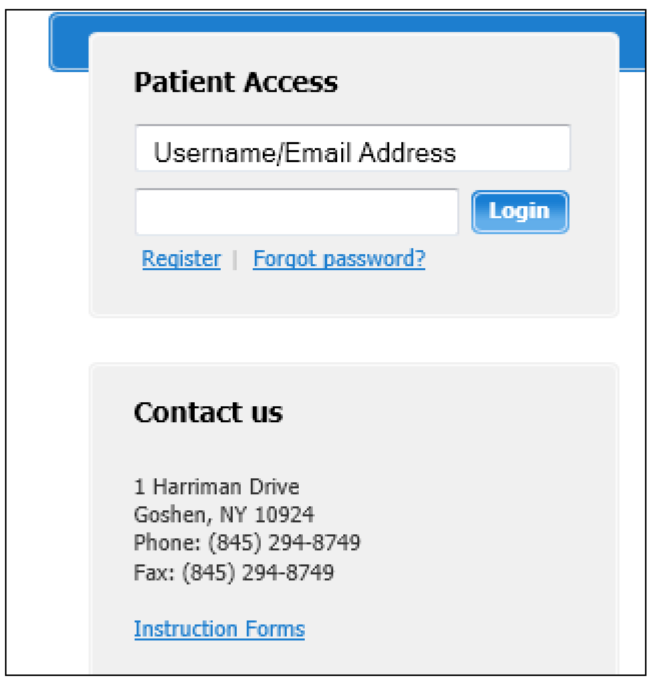
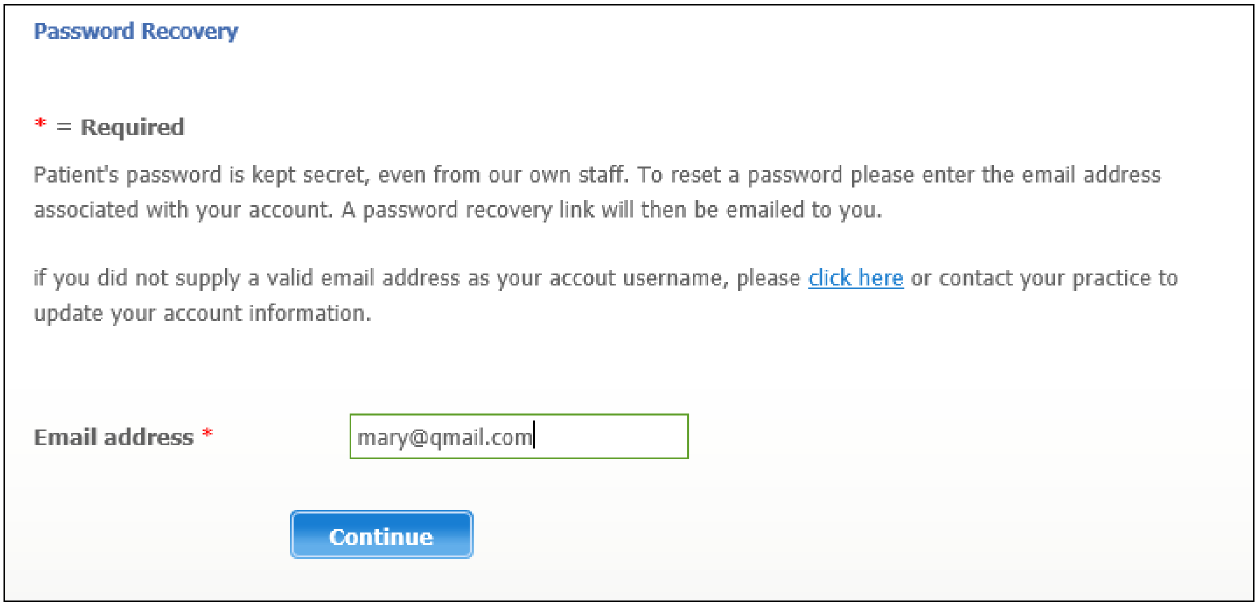


Figure 12: Patient Portal>Forgot Password (Reset)

Patient Update of Portal Website Account – If a patient has already registered on the portal, they will be prompted to update their login to an email address. Note that the email address field will be prepopulated with their current email address if an email is already on file in the WRS System.

Patient Resets Password from Portal Website – Patients can now request a **Password Reset** on the portal by entering the Email Address specified for their account.


Password Recovery

* = Required

Patient's password is kept secret, even from our own staff. To reset a password please enter the email address associated with your account. A password recovery link will then be emailed to you.

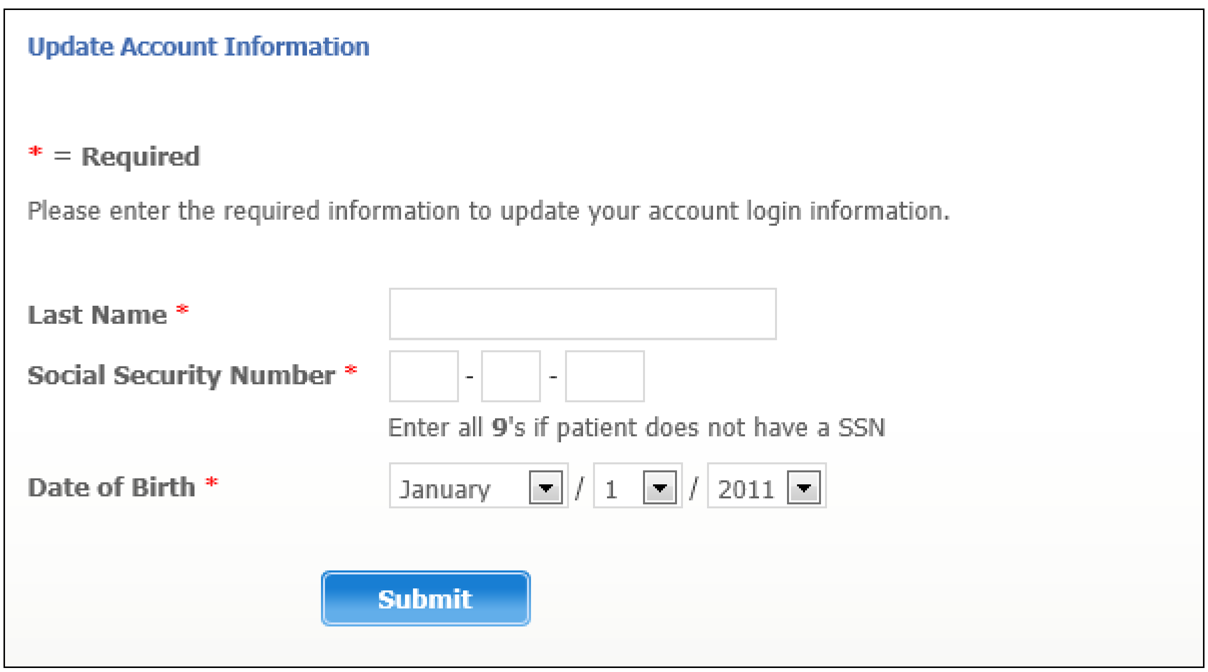
if you did not supply a valid email address as your accout username, please click here or contact your practice to update your account information.

Email address * mary@qmail.com

Continue

Figure 13: Patient Portal>Forgot Password (Reset)

Note that patients who have not yet updated their User Logins to an Email Address will receive the following message "**if you did not supply a valid email address as your account username, please <u>click here</u> or contact your practice to update your account information**." They will then have the option to enter an Email Address on the **Forgot Password** page.


Update Account Information

* = Required

Please enter the required information to update your account login information.

Last Name *

Social Security Number * - -

Enter all 9's if patient does not have a SSN

Date of Birth * January / 1 / 2011

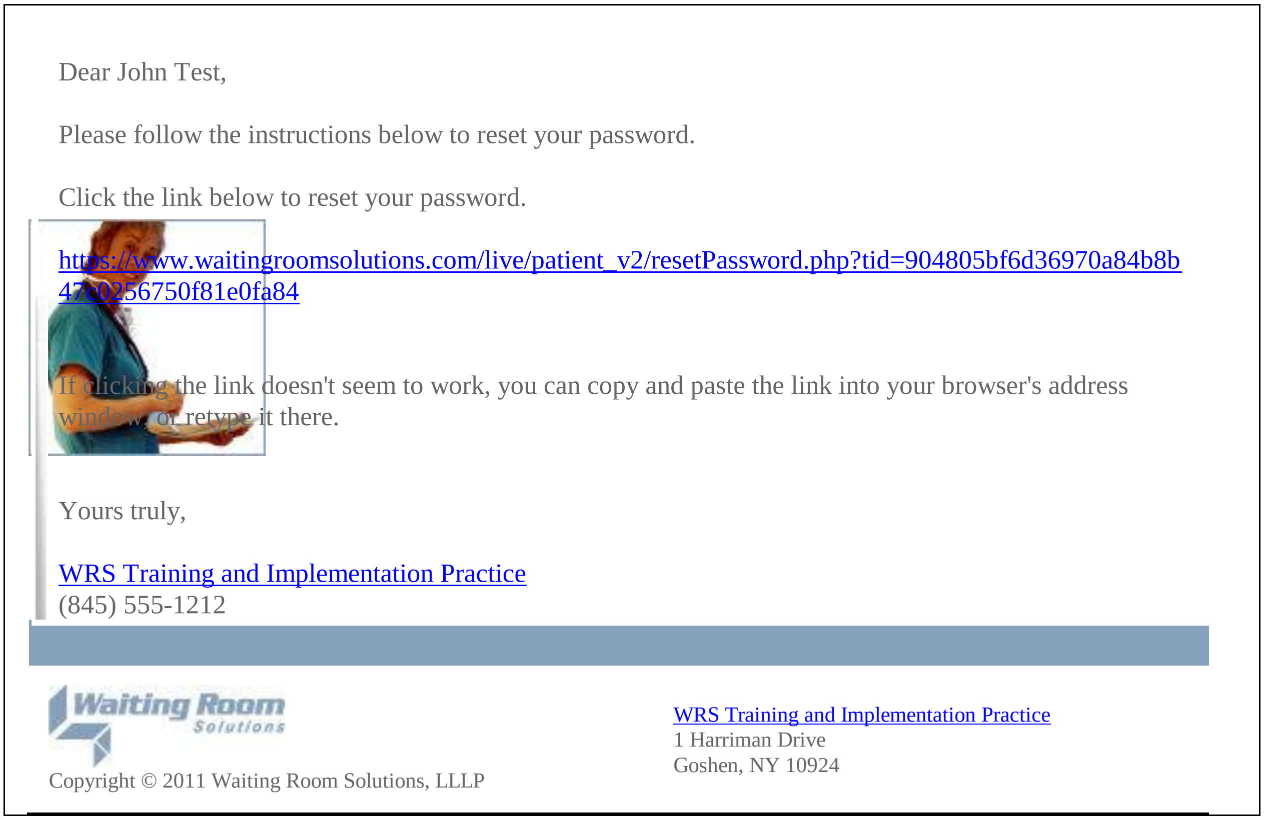
Submit

Figure 13: Patient Portal>Forgot Password (Reset)

From: do-not-reply@waitingroomsolutions.com [mailto:do-not-reply@waitingroomsolutions.com]
Sent: Thursday, December 15, 2011 9:47 AM
To: johntest@optimum.net
Subject: WRS Training and Implementation Practice Password Reset Instruction

Date: Thu, 15 Dec 2011 09:46:33 -0500

Thursday, December 15, 2011



Dear John Test,

Please follow the instructions below to reset your password.

Click the link below to reset your password.

https://www.waitingroomsolutions.com/live/patient_v2/resetPassword.php?tid=904805bf6d36970a84b8b47c0256750f81e0fa84

If clicking the link doesn't seem to work, you can copy and paste the link into your browser's address window, or retype it there.

Yours truly,

WRS Training and Implementation Practice
(845) 555-1212

Waiting Room Solutions

WRS Training and Implementation Practice
1 Harriman Drive
Goshen, NY 10924

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Figure 14: SAMPLE – Patient Password Reset Email

Demographic Reports (Click to View Video Release Note 5)

Functionality has been added to allow users to generate a patient reports/lists based on a selection of user-specified criteria. Please note that the Demographic Report runs overnight. So, the user would set it up and it will be ready for viewing the next day.

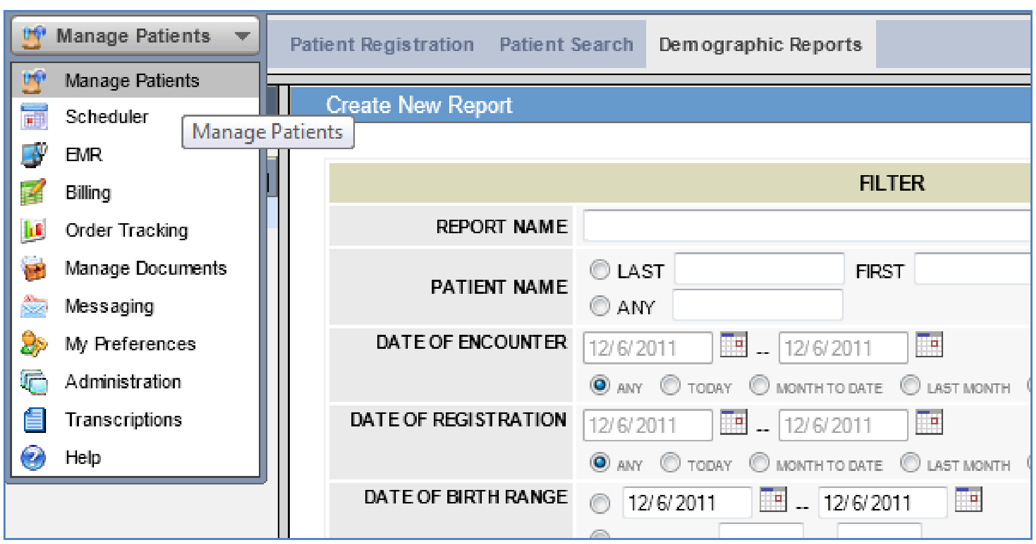

Figure 15: Manage Patients>Demographic Reports

Setting Up Filters for the Demographic Report

This new function is found under **Manage Patients>Demographic Report.** Demographic Report filters can be used to specify criteria for creating a Demographic Report. Users can filter information based on any of the available patient criteria. Leaving any/all filter selections blank will include all patients in the practice for that criteria.

1) Under **Report Name** enter a name for the report
2) Set Desired Filter Parameters for the report (patient names, date ranges, other demographic elements, ICD codes, insurance category, etc.)
3) Select Any to include all Patient Names and/or Date Range(s)

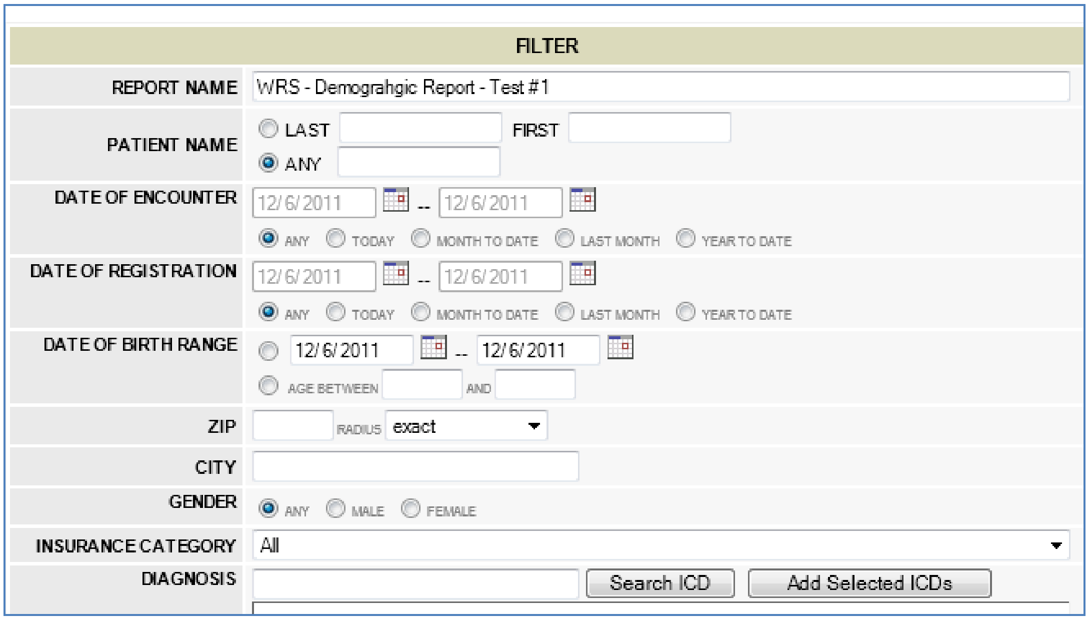

Figure 16: Manage Patients>Demographic Reports>Filter

Setting up the Display for the Demographic Report

Under the Display portion of the Demographic Report setup, users can select any/all fields to include in the completed Report.

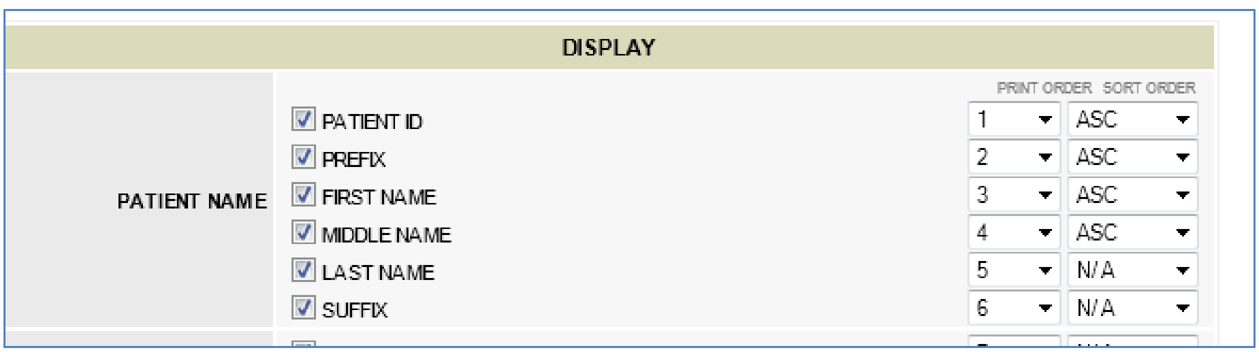

Figure 17: Manage Patients>Demographic Reports>Display

Setting the Order of Demographic Data Displayed

The **Print Order** and **Sort Order** are used to specify the order of information in your completed report. Note that **Print Order** determines the “priority” of each item in the report (example: to run a report where Last Name is key, select **Print Order** and enter “1” for Last Name under Print Order). **Sort Order** can also be used to further specify the order of data.

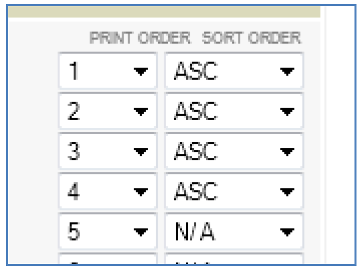

Figure 18: Manage Patients>Demographic Reports>Sort & Print Order

Each line of the report includes the patient's information. Example: FIRST NAME is ASC and LAST NAME is DESC – the program checks **Print Order** to see which column has higher priority, and then sorts by these parameters.

<u>Example</u>: sort patients by STATE, and then sort by LAST NAME within each state, by using the following settings:

STATE PRINT ORDER = 1 SORT ORDER = ASC
LAST PRINT ORDER = 2 SORT ORDER = ASC

The results would be:

alabama, anderson;
alabama, johnson;
florida, abramson;

Active Demographic Report Queue

Once a report is setup it will run behind-the-scenes and be available the next day.

Active Demographic Reports

Report Id	Report Name	Created On	Created By	Delete
17	WRS - Demographic Report #1	12/06/2011	NORA ALEXANDER	Delete

Figure 19: Manage Patients>Demographic Reports>Active Reports

Completed Demographic Report Queue

The completed report will be shown under the **Completed Demographic Reports**. Each report will be assigned a **Report ID**, **Report Name. Created On** and **Created By** information will also be shown**.**

Completed Demographic Reports

Report Id	Report Name	Created On	Created By	View Results	Export	Delete
2	vladimir's - year to date, age 20-80	11/11/2011	VLADIMIR MASLO	View Results	Download CSV	Delete
3	vladimir's - full report	11/11/2011	VLADIMIR MASLO	View Results	Download CSV	Delete
4	NAA Test_Report_11.16.11	11/16/2011	NORA ALEXANDER	View Results	Download CSV	Delete
5	NAA Test_Report_2_11.16.11 (patient=any)	11/16/2011	NORA ALEXANDER	View Results	Download CSV	Delete
6	NAA Test_Report_2_11.16.11 (insurance=unknown)	11/16/2011	NORA ALEXANDER	View Results	Download CSV	Delete
7	NAA Test_Report_4_11.16.11 (Diag=017.40)	11/16/2011	NORA ALEXANDER	View Results	Download CSV	Delete

Figure 20: Manage Patients>Demographic Reports>Completed Reports

Clicking **View Results** will open a new tab (or window)

1255005		Patti		Test		female	03/27/1990	21		888888888	home:8888888888	nomail@w aitingroomsolutions.com	home	111 Test Street	MIDDLETOWN	NY	10940	AETNA	111111111111	PO Box 14094
1334023		Nora		Test		female	01/01/1983	28		999999999	home:2222222222	nomail@w aitingroomsolutions.com	home	1 State Street	MONROE	NY	10950	BLUE CROSS-CA: BLUE CROSS PRUDENT BUYER PLAN SMALL GROUP	123456789	PO BOX 9042
1337678		Melissa	M	Test		female	06/20/1980	31	married	123456789	home:8455555555	nomail@w aitingroomsolutions.com	home	1 happy lane	GOSHEN	NY	10924	UNITED HEALTHCARE-EMPIRE NEW YORK GOVERNMENT EMPLOYEE	89000000	PO BOX 1600
1339559		Angela		Test		female	07/25/1950	61		123456789	home:8455555555	nomail@w aitingroomsolutions.com	home	1 happy lane	MIDDLETOWN	NY	10940	AETNA	111111111111111	PO Box 14094

Figure 21: Manage Patients>Demographic Reports>Completed Reports>View Report

Selecting **Download CSV** will export a spreadsheet file for viewing in programs such as MS Excel.

	A	B	C	D	E
1	Patient ID	Prefix	FIRST NAME	Middle Name	Last Name
2	6043537		Vincent		xirxcuxe
3	6043867		xxtridx		Wxlz
4	6043847		xhxwnx		xichxelxxn
5	6043897		Jxnxthxn		xwiller
6	6044035		Dxnnx		Cullxri
7	6044086		Edwxrd		Purcxrx
8	6044098		Nxncy		Yxungblxxd
9	6044653		Dxniel		Nicxlette
10	6044222		Pxtrick		Hxgxn
11	6044382		Kxthy		Feretzxnix
12	6044428		Cxnxtxnce		Cxlderin

**Figure 22: Manage Patients>Demographic Reports>
Completed Reports>Export to CSV File (Excel)**

Setting Permissions for the Demographic Report

By default, no users in the practice will have access to this report. The practice should enable this permission for selected users under **Administration>Resource Management>Resource Setup>USER NAME>Permissions>Demographic Reports.** On the Permissions Tab, check the checkbox next to Demographic Reports, scroll to the bottom of the page, and press Save.

General Permissions	View	Add	Edit	Delete
Practice Info	☑	☑	☑	☑
Insurance Info	☑	☑	☑	☑
Links (Sections / Specialites)	☑	☑	☑	☑
Affiliated Organizations	☑	☑	☑	☑
Contact Info	☑	☑	☑	☑
Location Info	☑	☑	☑	☑
Instruction Info	☑	☑	☑	☑
Doctor Info	☑	☑	☑	☑
User Info	☑	☑	☑	☑
Patient Info	☑	☑	☑	☑
Patient Merge Admin	Check for Yes ☑			
Emergency Patient Info Access	Check for Yes ☑			
Demographic Reports	Check for Yes ☑			

**Figure 22: Administration>Resource Management>Resource Setup>
USER ID>Permissions> Demographic Report**

Additional Enhancements & Adjustments

Several enhancements and adjustments have been made to overall system functionality. These include, but are not limited to, the following items:

- Patient Information Box now immediately reflects updated insurance information
- Updates to Ob-Gyn Note Format
- Updates to Eye Exam Note Format
- Ability to Update and Deactivate added under **Administration>Billing Setup>Miscellaneous Charge Reasons**