

**To:** All WRS Users  
**From:** WRS Implementation Team  
**Date:** 01/01/2022  
**Re:** Scheduler View

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As we remove the legacy version of the WRS Health Scheduler, this notice is to inform you of workflow changes that might occur if you use the older version for scheduling patient appointments.

### ITEMS IN THIS RELEASE



Using the Scheduler



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## Using the Scheduler

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### SCHEDULING A PATIENT:

Go to SCHEDULER > APPOINTMENT VIEW

- **FILTERS:** select an appointment type, provider, or the location you would like to view.
- **SCHEDULING:**
  - If you already have your patient under your recently viewed patient section (lower left-hand corner), you can drag and drop the patient's name on the exact date and time requested.
  - It will then pop open the new appointment box where you can make changes or modifications on the time, location, resource, patient's name, and appointment type. Select "Book appointment" to save.
  - "Send email notification" will allow a patient to receive an email and text message with the appointment details.
  - To confirm an appointment: hover over the patient's name, click on the view appointment detail, click confirm. Then you will see that the patient's name has turned to bold. The number found beside the patient's name, which is one, refers to the workflow. The patient is in the first step of the workflow which means an appointment has been made.

## SCHEDULING FOR RECURRING TYPES OF APPOINTMENTS:

Go to *SCHEDULER > AVAILABLE TIME SEARCH*

- Set your filters then click search to see all available schedules.
- Search the patient
- Select and set up a recurrence pattern.
- Click submit.
- To view all appointments for a specific patient, search the patient and go to the *Patient Management page and click the Appointment search.*

## Scheduler Setup

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### CREATING SCHEDULER TEMPLATE:

Practices will be able to setup and configure in a way that safeguards the provider's valuable time. This will allow patients and staff to book appointments for a specific provider and a specific appointment type

### CREATING SCHEDULE EXCEPTION:

Practices will be able to create available and unavailable schedule exceptions which will allow them to open a blocked schedule of a provider for situations such as working lunch or working holidays; and it will also allow them to block an open schedule for events/situations such as holidays, vacation, and even sick leave.

### NON-HUMAN RESOURCE TYPE SETUP:

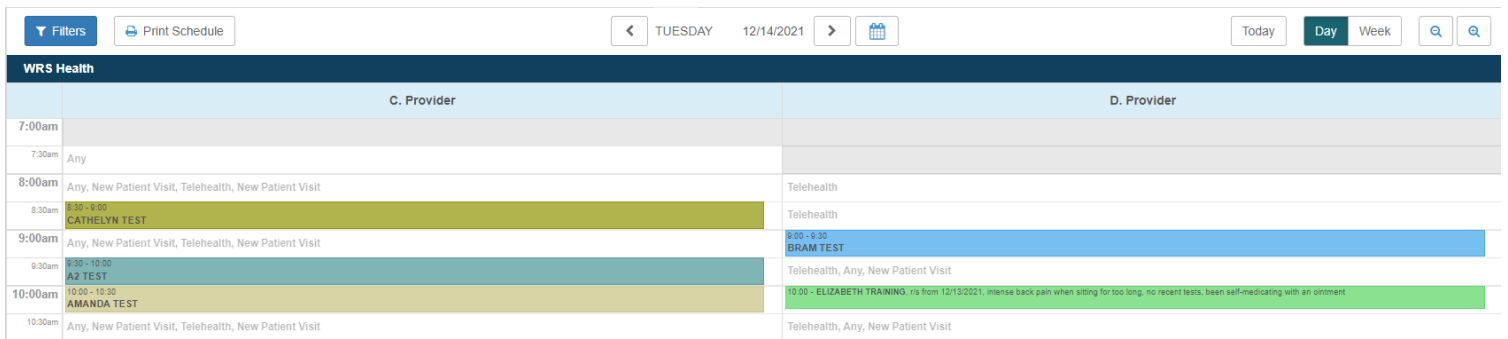
Practices who offer services such as allergy testing, allergy shots, ultrasound, counselling, or therapy will be able to create another type of schedule template which will allow patients and staff to book appointments.

## Scheduler Display

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Practices with multiple providers will be able to set their offices' earliest time and latest time, considering all locations within the practice. This will set their appointment view for multiple providers.

Once this section is set up, staff will be able to create a scheduler template for every provider in every location within the practice



WRS Health		
	C. Provider	D. Provider
7:00am		
7:30am	Any	
8:00am	Any, New Patient Visit, Telehealth, New Patient Visit	Telehealth
8:30am	8:30 - 9:30 CATHELYN TEST	Telehealth
9:00am	Any, New Patient Visit, Telehealth, New Patient Visit	8:00 - 9:30 BRAM TEST
9:30am	9:30 - 10:00 A2 TEST	Telehealth, Any, New Patient Visit
10:00am	10:00 - 10:30 AMANDA TEST	10:00 - ELIZABETH TRAINING /rs from 12/13/2021. intense back pain when sitting for too long. no recent tests, been self-medicating with an ointment
10:30am	Any, New Patient Visit, Telehealth, New Patient Visit	Telehealth, Any, New Patient Visit