



To: All WRS Users
From: WRS Development Team
Date: 03/21/14
Re: WRS Health System Update

The WRS Development Team will perform an update on or about March 21, 2014. This release will include the following functionality as mandated by Meaningful Use Stage 2 requirements:

Patient Portal - View Summary Notes, Appointments & Requests

Functionality has been added to allow patients to **View Notes, Appointment History, and Request Amendments** to notes from the **Patient Portal**. These functions can be enabled/disabled by the practice (below).



Patient Portal>Patient Dashboard>Manage My Medical Record

View Appointment History, Summary, Request Note Amendment

Appointment History allows patients to view a list of past and future appointments. This page also gives patients the ability to **View Summary (Note)** and **Request an Amendment** for any previous encounter.

Appointment History					
Show	25	entries	Search: <input type="text"/>		
Appointment Time	Provider	Location	Type	View Summary	Request Amendment
Wed, 04/02/2014 9:00 AM - 9:15 AM	Physicians Assistant	Goshen Office	Follow Up Appointment	View	Make Request
Fri, 03/21/2014 9:20 AM - 9:30 AM	Physicians Assistant	Goshen Office	Established Patient	View	Make Request

Showing 1 to 2 of 2 entries

◀ Previous Next ▶

Practice Website Portal>Patient Dashboard>Manage My Medical Record>Appointment History

Notes designated as **Private** by the practice cannot be viewed, or amended, from the **Patient Portal**. **Private Notes** are shown as “- -” and these do not display with a **View Summary** or **Request Amendment** option.


Type	View Summary	Request Amendment
Follow Up Appointment	--	--
Established Patient	View	Make Request

◀ Previous Next ▶

Practice Website Portal>Patient Dashboard>Manage My Medical Record>Appointment History>View Summary/Request Amendment

WRS Implementation and Training Practice
 2004 Route 17m, Goshen, NY 10924-1234
 Tel: (845)294-8749 Fax: (845)294-8749

Test, Maryann
 DOB: 07/14/1941, 72 year old Female
 Note No.14537961, Date: Mar 21, 2014



Printed 9:53 AM Mar 21 2014, User Location: Goshen Office

HISTORIES & HABITS

Medical History: No Medical History on Record

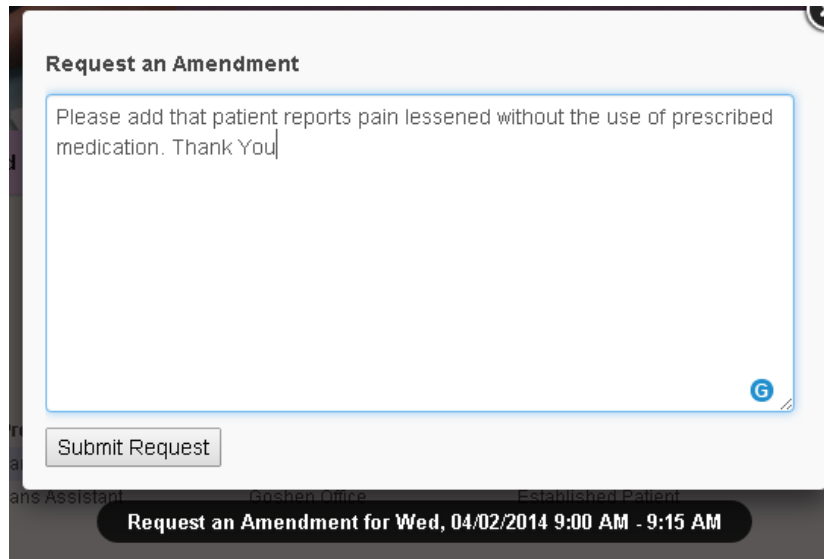
Chief Complaint

Complaint: ear pain

Practice Website Portal>Patient Dashboard>Manage My Medical Record>Appointment History>View Summary (View Note)

Patient Note Amendment Request

Patients can request an **Amendment** to an encounter note by selecting **Make Request** and entering a description of the **Amendment**, pressing **Submit** to finalize:



Request an Amendment

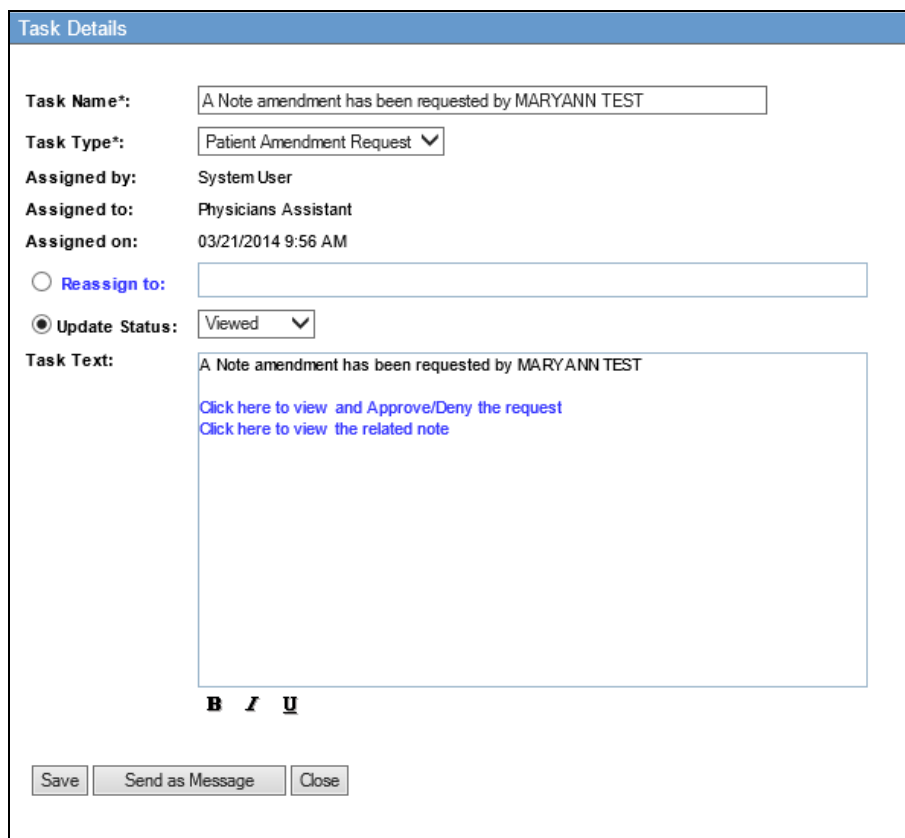
Please add that patient reports pain lessened without the use of prescribed medication. Thank You

Submit Request

Request an Amendment for Wed, 04/02/2014 9:00 AM - 9:15 AM

Practice Website Portal>Patient Dashboard>Manage My Medical Record>Appointment History>Request Amendment

A task is automatically created and sent to provider associated with that note. The provider task includes an option to **view and Approve/Deny the request** and/or **view the related note**.



Task Details

Task Name*: A Note amendment has been requested by MARYANN TEST

Task Type*: Patient Amendment Request

Assigned by: System User

Assigned to: Physicians Assistant

Assigned on: 03/21/2014 9:56 AM

Reassign to:

Update Status: Viewed

Task Text: A Note amendment has been requested by MARYANN TEST

[Click here to view and Approve/Deny the request](#)

[Click here to view the related note](#)

B I U

Save Send as Message Close

Messaging>Tasks>Patient Amendment Request (Sent to Provider)

The provider can **Approve/Deny the request** to review the amendment submitted by the patient and select **Response: Approve** or **Deny** to **Submit** their response.

Amendment Request Response

Date Requested:

Requested By:

Amendment Requested:

Please add that patient reports pain lessened without the use of prescribed medication. Thank You

Response:

Messaging>Tasks>Patient Amendment Request>Amendment Request Response

If **Accepted** by the provider, the **Amendment** is reflected in the note (**View Note**).

Private Visit

PATIENT ANNOTATIONS

Patient Amendment Request: The following was requested on Mar 21 2014 by MaryAnn Test
Please add that patient reports pain lessened without the use of prescribed medication. Thank You
Practice Response: (Request has been approved by Physicians Assistant 9:58 AM Mar 21 2014)

EMR>View Note>Patient Amendment Request>Accepted by Provider

If **Declined** by the provider, the note includes a notation of the **Amendment Request** and a link to the request message from the patient.

PATIENT ANNOTATIONS

Patient Amendment Request: [Click here to view request made on Mar 21 2014 by MaryAnn Test](#)

EMR>View Note>Patient Amendment Request>Declined by Provider

Request History

Request History allows the patient to see all requests submitted to the practice for medical record information and amendments to notes. This function is found under **Patient Dashboard>Manage My Medical Record>Request History** (if enabled):

MANAGE MY MEDICAL RECORD • QUICK LINKS



Email and Password



Personal Info



Phone and Contact



Current Medications



Edit Pharmacy Locations



Medical History



Lifestyle & Social History



Insurance Information



Appointment History



Request History



My Healthcare Providers



My Practices

Patient Portal>Dashboard>Manage My Medical Record

Selecting **Request History** will display any/all previous **Electronic Health Record Requests** and **Amendment Requests** on file for that patient.

Patient Electronic Health Record Requests					
Request Date	Description	Edit	Delete		
03/21/2014 02:51:06 PM	Manual Request - Patient called to request copy of all records via fax on 03/19/14, NAA	Edit	Delete		

Patient Amendment Requests					
Date Requested	Approved/Denied By	Status	Date Approved/Denied	View Summary	View Rec
Mar 21 2014	Physicians Assistant	Approved	Mar 21 2014	--	view
Mar 21 2014	Physicians Assistant	Denied	Mar 21 2014	view	view

Patient Portal>Dashboard>Manage My Medical Record>Request History (if enabled)

Practice users can also view this information under **Patient Management>Comments**:

Patient Electronic Health Record Requests					
Request Date	Description	Edit	Delete		
03/21/2014 02:51:06 PM	Manual Request - Patient called to request copy of all records via fax on 03/19/14, NAA	Edit	Delete		

[+ Add Request](#)

Patient Amendment Requests					
Date Requested	Approved/Denied By	Status	Date Approved/Denied	View Summary	View Request
Mar 21 2014	Physicians Assistant	Approved	Mar 21 2014	view	view
Mar 21 2014	Physicians Assistant	Denied	Mar 21 2014	view	view

Manage Patients>Comments>Patient Electronic Health Record Requests and Patient Amendment Requests (if enabled)

Practice Controls - Appointment & Request History

Practice administrators can enable or disable **Appointment & Request History** functions under **Administration>System Settings>Practice Settings**:

<p>Patient access to Appointment & Request History on patient portal: <input type="radio"/> Enabled <input checked="" type="radio"/> Disabled</p> <p>Patient access to view summary on Appointment History on patient portal: <input type="radio"/> Enabled <input checked="" type="radio"/> Disabled</p> <p style="text-align: center;">Save</p>

Clinical Log Enhancements

Additional functionality has been added to **Clinical Logs** under **Administration>Practice Settings>Practice Logs>Clinical Log**. The ability to filter by **Event Type** and **Action Type** has been added. Note that **Date Range** has now been limited to maximum period of 90 days:

Clinical Logs										
Patient:	Any	User:	Any	Note ID:		Event Type:	Demographics	Action Type:	Any	
Date Range:	2/1/2014	--	3/31/2014	Display:	50	<input type="button" value="Search"/> <input type="button" value="Print"/> <input type="button" value="Export to File"/>				
Time	Note ID	Patient	Employee	Event Type	Event	Action Type				
03/21/2014 09:01:27		TEST, MARY ANN WRS ID:2724963		Demographics	patient registers with WRS Implementation and Training Practice	add				

SNOMED Coding

Ability to view and notate SNOMED coding within the **Patient History** and **EMR Note** has been added.

An option to display **SNOMED** coding on **ICD Superbill** and **Assessment & Plan** can be selected under **Administration>EMR Setup>ICD Superbill**:

ICD Superbill Management	
<input checked="" type="checkbox"/>	Display SNOMED in Superbill and EMR Assessment & Plan
Item Name	Description
Blood Diseases	
Anemia in chronic kidney disease	Anemia in chronic kidney disease
Anemia of other chronic illness	Anemia of other chronic illness
Family history of malignant neoplasm of breast	Family history of malignant neoplasm of breast

Administration>EMR Setup>ICD Superbill>Display SNOMED

If **Display SNOMED** (above) is checked, a **SNOMED CT** section will appear on the **Assessment & Plan** page of all notes:

Add SNOMED CT Code	
otitis	<small>Hold Ctrl key to Select Multiple Codes</small> SEROMUCINOUS OTTIS MEDIA (DISORDER) [1980003] ACUTE OTTIS MEDIA (DISORDER) [3110003] OTTIS EXTERNA (DISORDER) [3135009] MUCOSANGUINOUS CHRONIC OTTIS MEDIA (DISORDER) [6485001] SUBACUTE NONSUPPURATIVE OTTIS MEDIA (DISORDER) [6965008]
<input type="button" value="Add to Current Note Assessments"/>	
Follow up: prn <input type="checkbox"/>	day(s) <input type="text" value=""/> <input type="button" value="v"/>
<input type="button" value="Delete"/> <input type="button" value="Print"/> <input type="button" value="Save"/>	

EMR Note>Assessment & Plan>SNOMED

SNOMED coding is also now shown under **Administration>EMR Setup>Medical Condition Management**:

Management	Surgery History Management	Note Display Templates	Surgical Proce
Medical Condition Management			
ICD Code	Condition	SNOMED	
303.9	Alcoholism		
477.9	Allergic rhinitis	61582004	
281.90	Anemia		

Administration>EMR Setup>Medical Condition Management

SNOMED coding has been added to **Family History**, **Medical History** and **Histories/Habits** pages. Also, the designation of first level relatives is now shown with a **(1)** icon:

Relation	Added By	Comment	Condition	Active	Delete
(1) Father	Alexander, Nora 03/21/2014	Edit	-Diabetes	<input checked="" type="checkbox"/>	Delete
Maternal Grandfather	Alexander, Nora 03/21/2014	Edit	-Congestive heart failure	<input checked="" type="checkbox"/>	Delete
(1) Mother	Alexander, Nora 03/21/2014	Edit	-Congestive heart failure	<input checked="" type="checkbox"/>	Delete
Sister	Alexander, Nora 03/21/2014	Edit	-Arthritis	<input checked="" type="checkbox"/>	Delete