



To: All WRS Users
From: WRS Development Team
Date: 04/10/2017
Re: Software Release

Filters 03/12/2017 - 03/18/2017 Current Week Day Week

Goshen

Ada Provider Test , Doc Test , Nathan Test , Provider Test

	Mon 3/13	Tue 3/14	Wed 3/15	Thu 3/16	Fri 3/17
9:00am		Any	Any	Any	Any
9:30am	Any	Any	Any	Any	Any
10:00am	Any	Any	Any	Any	Any
10:30am	Any	Any	Any	Any	Any
11:00am	Any	11:15 - 11:45 RONALD FIRST	11:15 - 11:45 RONALD FIRST		
11:30am	Any	12:00 - 12:30 VIVICA FOX	12:15 - TEST ADAM		
12:00pm	Any	1:15 - VIVICA FOX	1:30 - VIVICA FOX		
12:30pm	Any	2:00 - SUZY SICKNESS			
1:00pm	Any	3:00 - DYLAN FIRST	3:20 - SUZY SICKNESS		
1:30pm			4:00 - MIKE FIRST		
2:00pm					
2:30pm					
3:00pm					
3:30pm					
4:00pm					

Appointment Details

Scheduled by: Victoria Poliakova

Tuesday 03/14/2017 From 12:00 PM To 12:30 PM

Location Goshen

Patient VIVICA FOX 12/31/1990

Resource Test, Nathan

Appointment Type Consultation

Notes Enter Comments

☒ Send Email Notification

Scheduler Enhancements

Multi-Provider Views

Drag n' Drop Appointments

Zoom In & Out

Calendar Icon

Easy Rescheduling

Redesigned Dialog Boxes

Smart Filters

Appointment Pop-up

Easy Access

Improved Visibility

Practice Setup Changes

[View Release Notes Video](#)

OPTIMIZED WORKFLOW

Multi-Provider Daily & Weekly Views

	Mon 3/13	Tue 3/14	Wed 3/15	Thu 3/16	Fri 3/17
9:00am		Any	Any	Any	Any
9:20am	Any	Any	Any	Any	Any
9:40am	Any	Any	Any	Any	Any
10:00am	Any	Any	10:00 - 10:25 TEST TEST	Any	Any
10:20am	Any	Any	Any	Any	Any
10:40am	Any	Any	Any	Any	Any
11:00am	Any	Any	Any	Any	Any
11:20am	Any	11:15 - 11:45 RONALD FIRST	11:15 - 11:45 RONALD FIRST	Any	Any
11:40am	Any	Any	Any	Any	Any
12:00pm	Any	12:00 - 12:30 VIVICA FOX	Any	Any	Any
12:20pm	Any	Any	12:15 - 12:35 TEST ADAM	Any	Any
12:40pm	Any	Any	Any	Any	Any

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

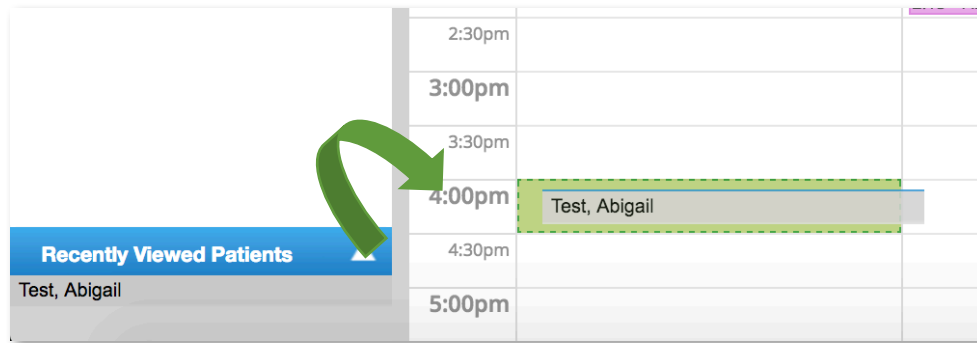
- Schedules can be filtered by Appointment Type and Practice Location.
- Possible Appointment Types are listed within each available appointment slot.

	A.Test	D.Test	N.Test	P.Test
11:10am	Any	Established Patient	Any	Any
11:20am	Any	Established Patient	Any	11:15 - 11:45 RONALD FIRST
11:30am	Any	Established Patient	Any	Any
11:40am	Any	Established Patient	Any	Any
11:50am	Any	Established Patient	Any	Any
12:00pm	Any	Established Patient	12:00 - 12:30 VIVICA FOX	12:00 - 12:15 MICHELLE TEST
12:10pm	Any	Established Patient	Any	Any
12:20pm	Any	Established Patient	Any	Any
12:30pm	Any	Established Patient	Any	Any
12:40pm	Any	Established Patient	Any	Any

Workflow:

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

Drag n' Drop Appointments

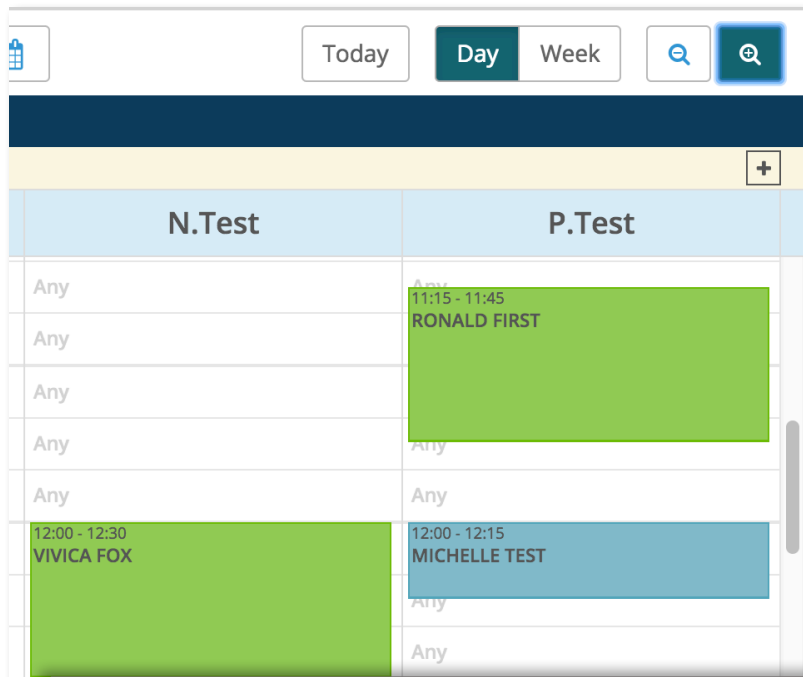


Patient names can be dragged from Recently Viewed Patients and Today's Appointments into the Scheduler. Appointments can be dragged and dropped between slots in any Scheduler View.

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

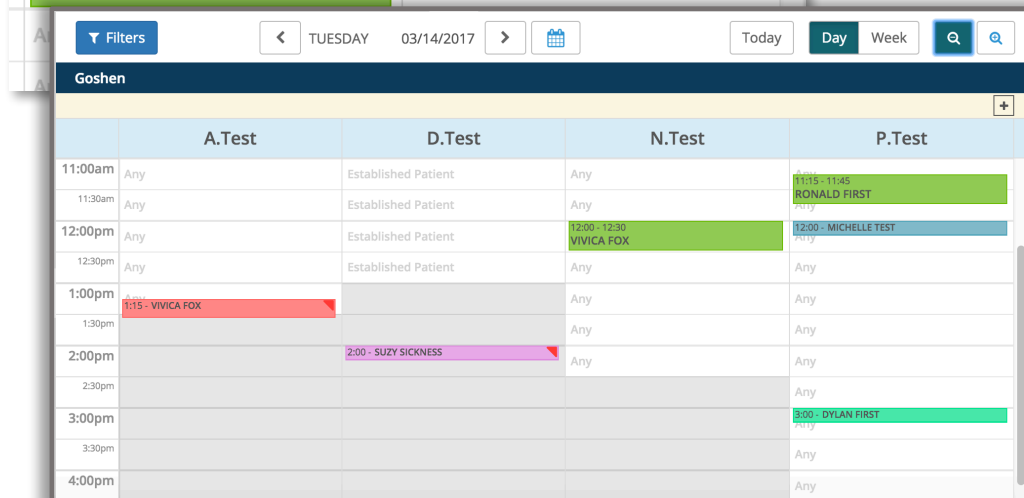


New Zoom In and Zoom Out buttons have been added to all scheduler windows.

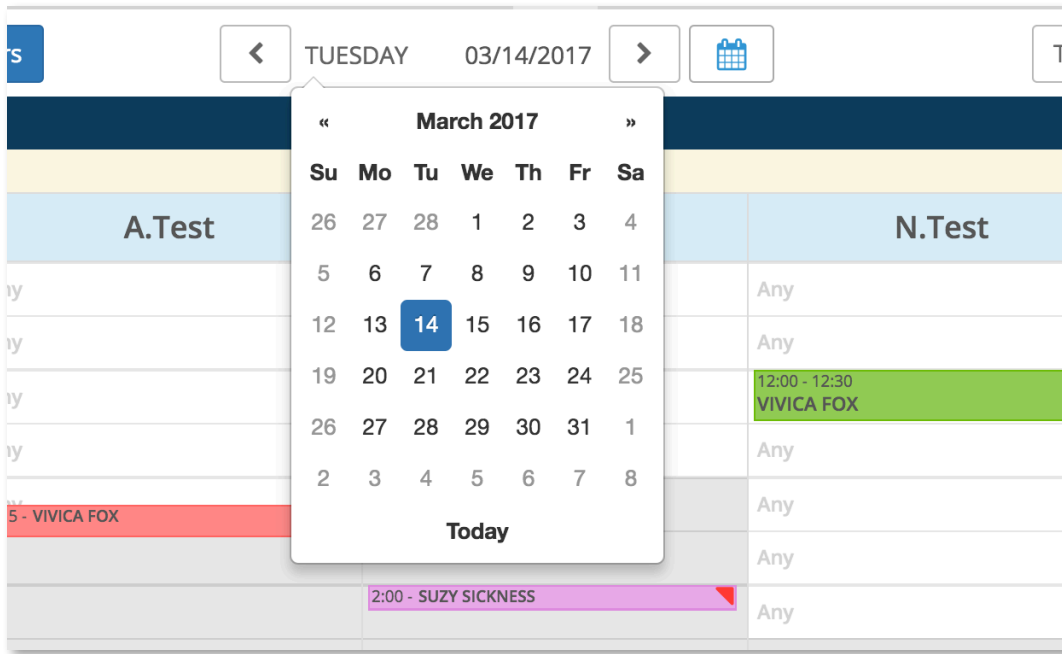
Pressing these easy-access buttons makes your view temporarily larger or smaller.

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 Icon



The new Calendar Icon has been added to all scheduler windows. Pressing this icon makes it easy to quickly navigate to an upcoming month or day.

Workflow:

1. Click on the **Calendar Icon** in the header to view the calendar

Easy Rescheduling

Appointment Details ✕

Scheduled by: Victoria Poliakova


Tuesday03/14/2017

From12:00 PM⌚

To12:30 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

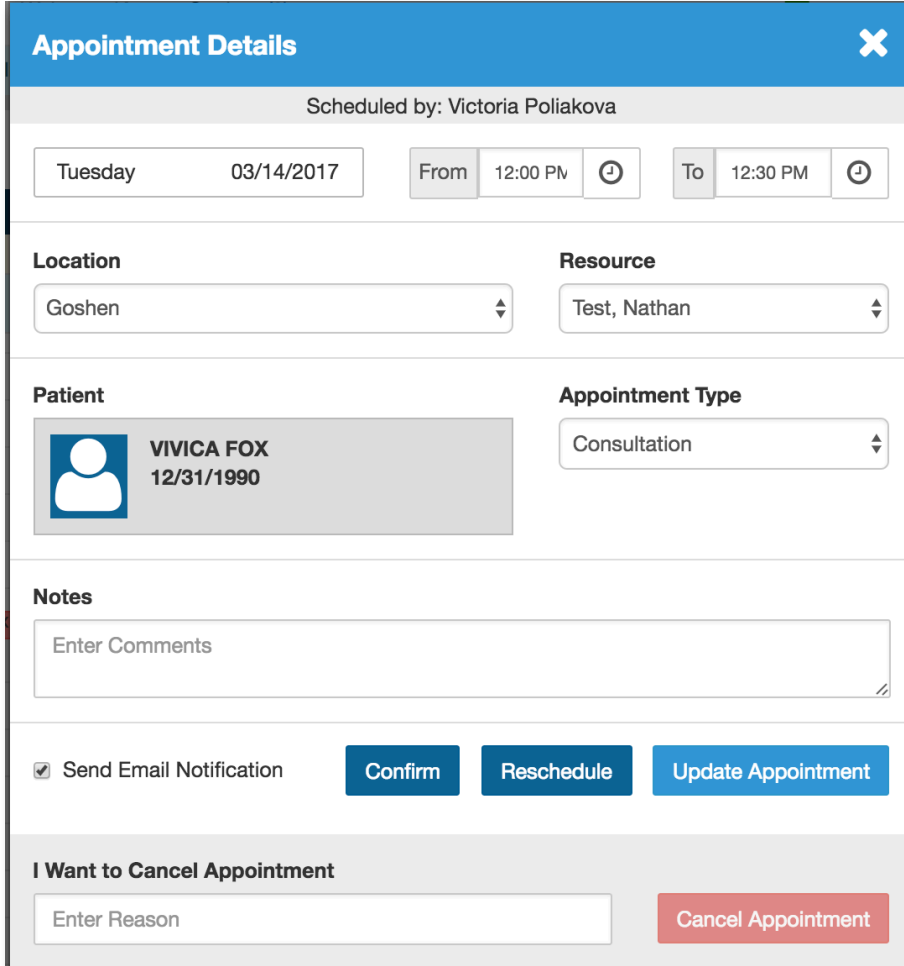
Cancel Appointment

A new **Reschedule Appointment** 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**

Redesigned Dialog Boxes



The dialog box is titled "Appointment Details" with a close button (X) in the top right corner. It contains the following 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 checkbox for "Send Email Notification" (checked), and three buttons: "Confirm", "Reschedule", and "Update Appointment".
- Cancel Section:** A section titled "I Want to Cancel Appointment" with a text field "Enter Reason" and a red "Cancel Appointment" button.

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 Pop-up Box will appear
3. View or edit the appointment details including name, date & time, location, provider and notes. From here, you can also reschedule and cancel appointments

Smart Filters

New filtering tools allow the easy display of
Providers, Appointment Types, and Practice Locations.

The screenshot shows a software interface for filtering appointments. At the top, there is a header bar with a 'Filters' button on the left, a date selector showing 'TUESDAY 03/14/2017' with navigation arrows and a calendar icon, and view toggles for 'Today', 'Day' (selected), and 'Week'. Below the header, the interface is divided into three vertical panels, each with a title and a list of items with checkboxes.

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"/> Allergv	<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

Customizable Appointment Pop-up Box

E

Appointment Made

2:15pm - 2:30pm

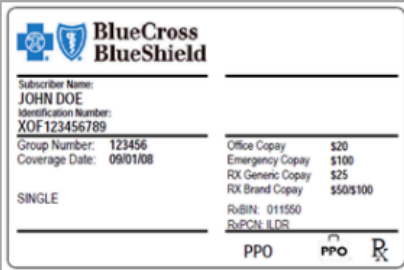


upload

Abigail Test
DOB 05/17/2007

Email Not Available

Sun Flower, BAINBRIDGE OH 45612



Upload Insurance Card Front

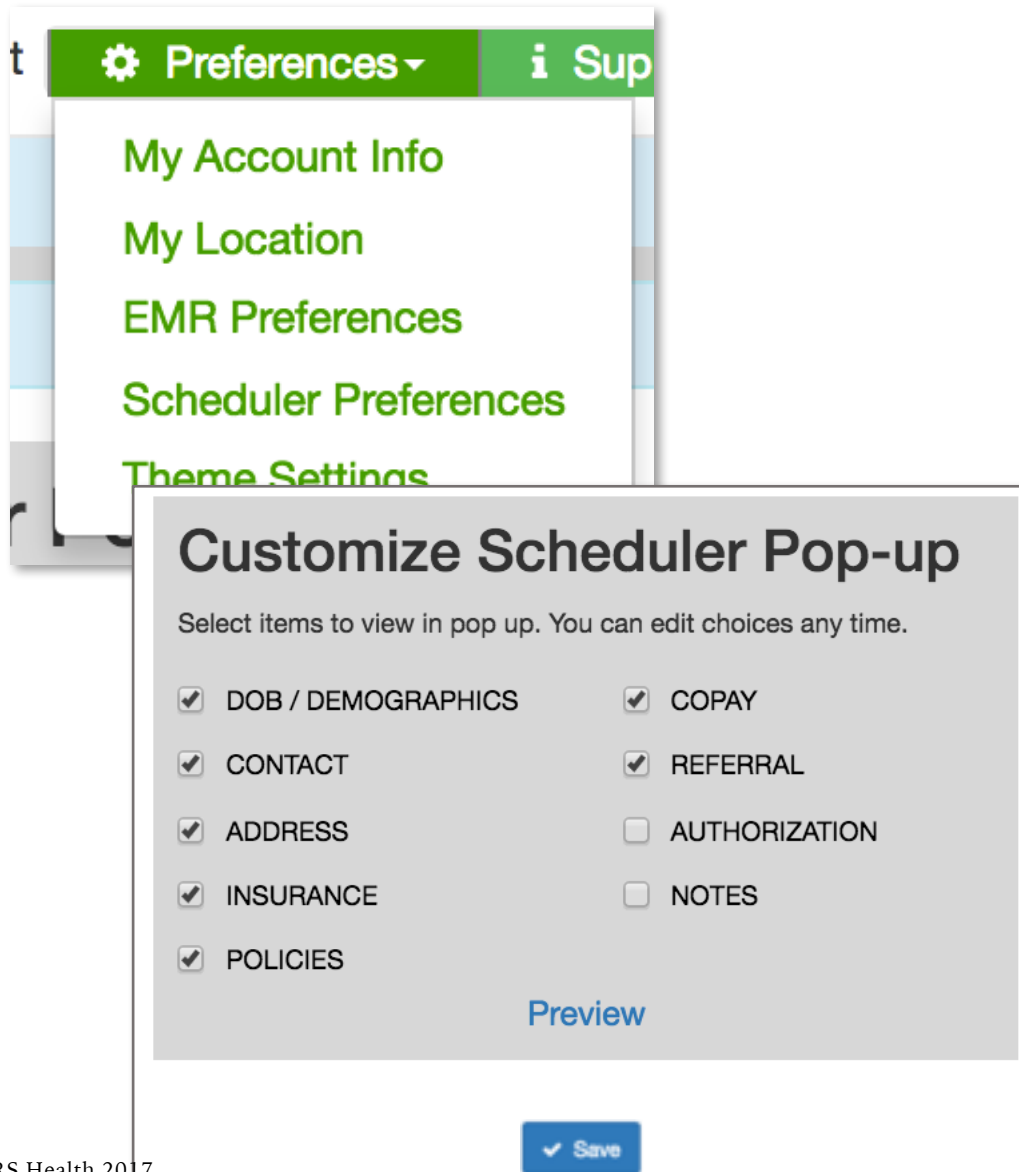
AETNA | #1234567890
Copay **DUE**

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.

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 Box



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 Photos to your Appointment Box

E Appointment Made

12:15pm - 12:30pm

Ajax Test
DOB 03/01/1956
(999)999-9999

upload Email Not Available

123 STREET, GOSHEN NY 12345-1234

Upload Insurance Card Front

Anthem BCBS | #test ID
Copay **35\$**

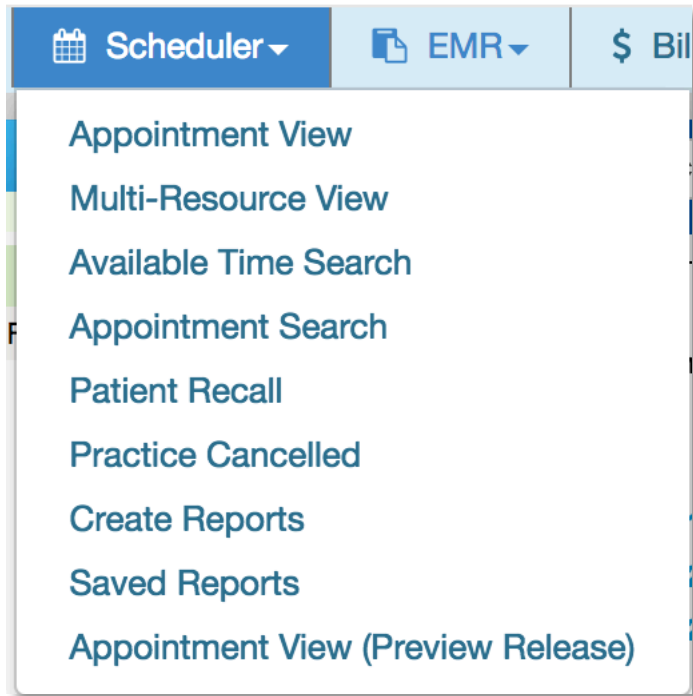
Referral **blank**

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

Easy Access



You can access the new Scheduler by selecting Appointment View (Preview Release) on the top of the Scheduler dropdown menu.

Note that the current scheduler will also be available for limited time. It will then get retired and this new scheduler will take its place.

IMPROVED VISIBILITY

Visual Improvements

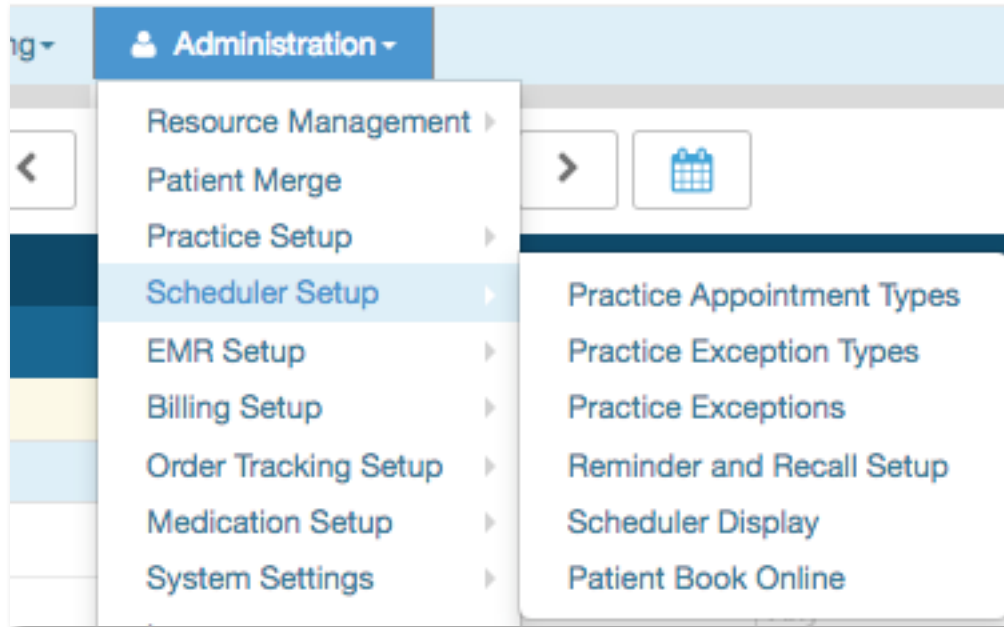
	Mon 3/13	Tue 3/14	Wed 3/15	Thu 3/16	Fri 3/17
9:00am		Any	Any	Any	Any
9:20am	Any	Any	Any	Any	Any
9:40am	Any	Any	Any	Any	Any
10:00am	Any	Any	10:00 - 10:25 TEST TEST	Any	Any
10:20am	Any	Any	Any	Any	Any
10:40am	Any	Any	Any	Any	Any
11:00am	Any	Any	Any	Any	Any
11:20am	Any	11:15 - 11:45 RONALD FIRST	11:15 - 11:45 RONALD FIRST	Any	Any
11:40am	Any	Any	Any	Any	Any
12:00pm	Any	12:00 - 12:30 VIVICA FOX	12:00 - 12:35 TEST ADAM	Any	Any
12:20pm	Any	Any	Any	Any	Any
12:40pm	Any	Any	Any	Any	Any
1:00pm	Any	1:15 - 1:35 VIVICA FOX	Any	Any	Any
1:20pm	Any	Any	1:30 - 1:45 VIVICA FOX	Any	Any
1:40pm					
2:00pm		2:00 - 2:15 SUZY SICKNESS			

Optimized:

1. **Colors:** Muted versions of the colors in your scheduler allow for enhanced visibility. This change does not impact your template or appointment types
2. **Grid:** Additional grid lines and 15-minute time blocks make it easier to schedule and view appointments
3. **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
4. **Header Bar:** Two different background colors makes it easy to distinguish between your location and selected provider.

PRACTICE SETUP CHANGES

Making Changes to Your Setup



None of the enhancements to the scheduler alter your templates, settings, or preferences.

- To make changes to your appointment and/or exception types, go to:
Admin>Scheduler Setup.
- To make changes to your provider list, go to:
Admin>Resource Management



If you need assistance please contact us at
Support@waitingroomsolutions.com