



To: All WRS Users
From: WRS Development Team
Date: 05/23/2019
Re: Updates to the WRS Health System

WRS Health is proud to announce the release of several new features created from the continued feedback and requests of our user community. Below is an explanation of new and updated items, along with directions for use.


Items in this Release:

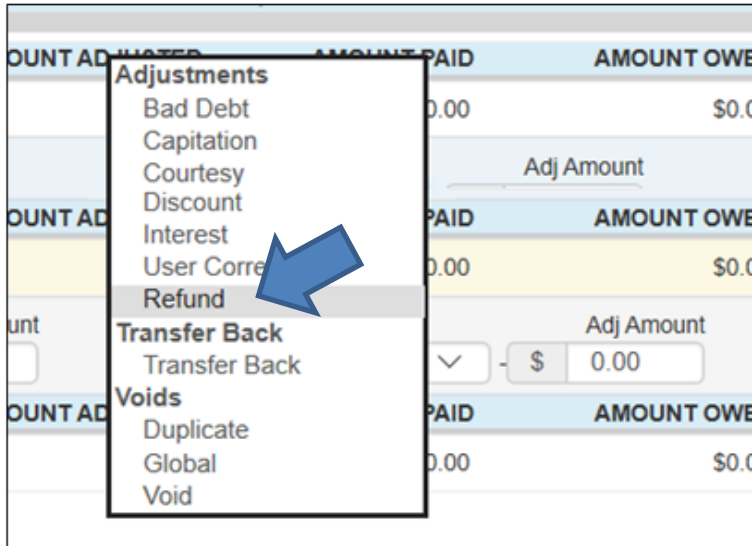
Refund Payment Adjustment (new)
Saved Billing Reports Queue (optimized view)
Clinical Data Reporting Module (new)

Refund Adjustment Type

Functionality has been added that allows users to identify payment adjustments as **Refund** and report on **Refund Adjustment Types**. **Refunds** can be applied to a patient or an insurance carrier.

A. Creating a Refund Adjustment to a Patient

To create a **Refund Payment Adjustment**, locate the line of the original charge and click **Adjustment Type** and select **Refund**. 



Enter the amount of the Adjustment and press **Submit** to confirm. The amount of the **Refund Adjustment** will then be subtracted from the **Amount Owed**

ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
	\$0.00	\$10.00	\$5.00	TEST, DIRK
Adj Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount
▼ \$ 0.00	Refund ▼	\$ 5.00	Contractual ▼	\$ 0.00
ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
	-\$50.00	\$50.00	\$0.00	Palmetto GBA - Railroad Medicare
Adj Amount	Adjustment Type	Adj Amount	Adjustment Type	Adj Amount
▼ \$ 0.00	Co-Insurance ▼	\$ 0.00	Contractual ▼	\$ 0.00
ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	
	-\$50.00	\$60.00	\$0.00	

Submit Reset

Example: A patient is charged \$10. A **Refund Adjustment** is made in the amount of \$5. The patient now shows \$5 under **Amount Owed**.

ments Messaging Administration

ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
	\$0.00	\$5.00	\$5.00	TEST, DIRK
Adj Amount: \$ 0.00	Adjustment Type: Refund	Adj Amount: \$ 5.00	Adjustment Type: Contractual	Adj Amount: \$ 0.00
ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
	\$-50.00	\$40.00	\$10.00	Palmetto GBA - Railroad Medicare
Adj Amount: \$ 10.00	Adjustment Type: Co-Insurance	Adj Amount: \$ 0.00	Adjustment Type: Contractual	Adj Amount: \$ 0.00
ALLOWABLE	AMOUNT ADJUSTED	AMOUNT PAID	AMOUNT OWED	OWED BY
	\$-50.00	\$60.00	\$0.00	

Submit Reset

Line Item	Amount	Type	Authorized By	Authorized On
99213	\$-10.00	Transfer Patient: Co-Pay	Patti Vanzuuk	05/22/2019
99213	\$-40.00	Contractual	Patti Vanzuuk	05/22/2019

Edit Payment	Line Item	Check/CC Number	Type	Paid By	Amount	Authorized By	Authorized On
Edit Payment	99213	test refund	Check	Palmetto GBA - Railroad Medicare	\$50.00	Patti Vanzuuk	05/22/2019
Edit Payment	99213	12345	Check	TEST, DIRK	\$10.00	Patti Vanzuuk	05/22/2019

B. Creating a Refund Adjustment to Insurance Carrier

Refunds can also be made to an insurance carrier. The amount of the refund is deducted from the **Amount Paid**.

Line Item	Amount	Type	Authorized By	Authorized On
99213	\$-10.00	Transfer Patient: Co-Pay	Patti Vanzuuk	05/22/2019
99213	\$-40.00	Contractual	Patti Vanzuuk	05/22/2019


Edit Payment	Line Item	Check/CC Number	Type	Paid By	Amount	Authorized By	Authorized On
Edit Payment	99213	test refund	Refund	Palmetto GBA - Railroad Medicare	\$-10.00	Patti Vanzuuk	05/22/2019
Edit Payment	99213	test refund	Check	Palmetto GBA - Railroad Medicare	\$50.00	Patti Vanzuuk	05/22/2019
Edit Payment	99213	12345	Refund	TEST, DIRK	\$-5.00	Patti Vanzuuk	05/22/2019
Edit Payment	99213	12345	Check	TEST, DIRK	\$10.00	Patti Vanzuuk	05/22/2019

Example: The insurance carrier has paid \$50. A **Refund Adjustment** is created in the amount of \$10. The **Amount Paid** now shows as \$40 and the insurance carrier is owed a refund of \$10.


	Line Item	Amount	Type	Authorized By	Authorized On
	99213	\$-10.00	Transfer Patient: Co-Pay	Patti Vanzuuk	05/22/2019
	99213	\$-40.00	Contractual	Patti Vanzuuk	05/22/2019

Edit Payment	Line Item	Check/CC Number	Type	Paid By	Amount	Authorized By	Authorized On
Edit Payment	99213	test refund	Check	Palmetto GBA - Railroad Medicare	\$50.00	Patti Vanzuuk	05/22/2019
Edit Payment	99213	12345	Check	TEST, DIRK	\$10.00	Patti Vanzuuk	05/22/2019

You can also view refunds and other adjustments by clicking **Edit Payment**.

RECEIVED ON	PAYMENT AMOUNT	UNAPPLIED AMOUNT	PAYMENT TYPE	CHECK NUMBER
5/22/2019 	\$50.00	\$10.00 Unpostable	CHECK Comment	test refur
Update				

RECEIVED ON	ALLOCATED ON	ALLOCATED TO	PAYMENT AMOUNT
	5/22/2019	Claim #: 11690754 99213	\$40.00

ADJUSTMENT AMOUNT	ADJUSTMENT TYPE	AUTHORIZED ON	AUTHORIZED BY
\$-10.00	Refund 	05/22/19	Patti Vanzuuk

C. Reporting on Refund Adjustments

A filter for **Refund Adjustments** has been added to the **Saved Reports Queue**. Selecting this filter allows the user to report only on **Refund Payment Adjustments** in combination with other report filters.

PRINT FILTERS?

DATE
05/01/2019 - 05/22/2019

Payment Adjustments

Refund

User Correction

Total Adjustments

Bad Debt

Capitation

Courtesy

Contractual

Discount

Interest

User Correction

Saved Billing Reports - Color-Coded View

The Saved Billing Reports Queue has been optimized to display related items by color.

# OF CHARGES	# OF BILLING CHARGES	PAYMENT/RVU	ALLOWABLE/RVU	TOTAL RVU	AMOUNT CHARGED	TRUE CHARGES	BILLED CHARGES	AMOUNT POSTED THIS PERIOD	TOTAL AMOUNT ENTERED	TOTAL AMOUNT POSTED	REFUND	TOTAL ADJUSTMENTS	TOTAL PATIENT TRANSFERS	TOTAL SECONDARY TRANSFERS	TOTAL TERTIARY TRANSFERS	TRANSFER BACK	TOTAL VOIDS
9	4	109.05	73.53	2.70	\$ 1,085.00	\$ 820.00	\$ 900.00	\$ -313.00	\$ -450.00	\$ -313.00	\$ -137.00	\$ -471.00	\$ -105.00	\$ -50.00	\$ 0.00	\$ 0.00	\$ 0.00
9	4	109.05	73.53	2.70	\$ 1,085.00	\$ 820.00	\$ 900.00	\$ -313.00	\$ -450.00	\$ -313.00	\$ -137.00	\$ -471.00	\$ -105.00	\$ -50.00	\$ 0.00	\$ 0.00	\$ 0.00

DATE CHARGED	PATIENT NAME	REASON FOR CHARGE	PAYMENT/RVU	ALLOWABLE/RVU	TOTAL RVU	AMOUNT CHARGED	TRUE CHARGES	BILLED CHARGES	AMOUNT POSTED THIS PERIOD	TOTAL AMOUNT ENTERED	TOTAL AMOUNT POSTED	REFUND	TOTAL ADJUSTMENTS	TOTAL PATIENT TRANSFERS	TOTAL SECONDARY TRANSFERS	TOTAL TERTIARY TRANSFERS	TRANSFER BACK	TOTAL VOIDS	AMOUNT OWED	LAST ACTION DATE	CMS 15	
05/08/2019	TEST, ANTHEA	99214	16.01	24.51	3.06	\$300.00	\$275.00	\$300.00	\$-49.00	\$-50.00	\$-49.00	\$-1.00	\$0.00	\$-225.00	\$-25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.00	05/08/2
05/17/2019	TEST, ANTHEA	99214	16.34	49.02	3.06	\$300.00	\$250.00	\$300.00	\$-50.00	\$-100.00	\$-50.00	\$-50.00	\$0.00	\$-100.00	\$-50.00	\$-50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	05/17/2
05/14/2019	TEST, DIRK	99213	35.89	-	2.09	\$200.00	\$200.00	\$200.00	\$-75.00	\$-100.00	\$-75.00	\$-25.00	\$0.00	\$-100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	05/14/2

Blue = Charges

Orange = Adjustments

Green = Payments

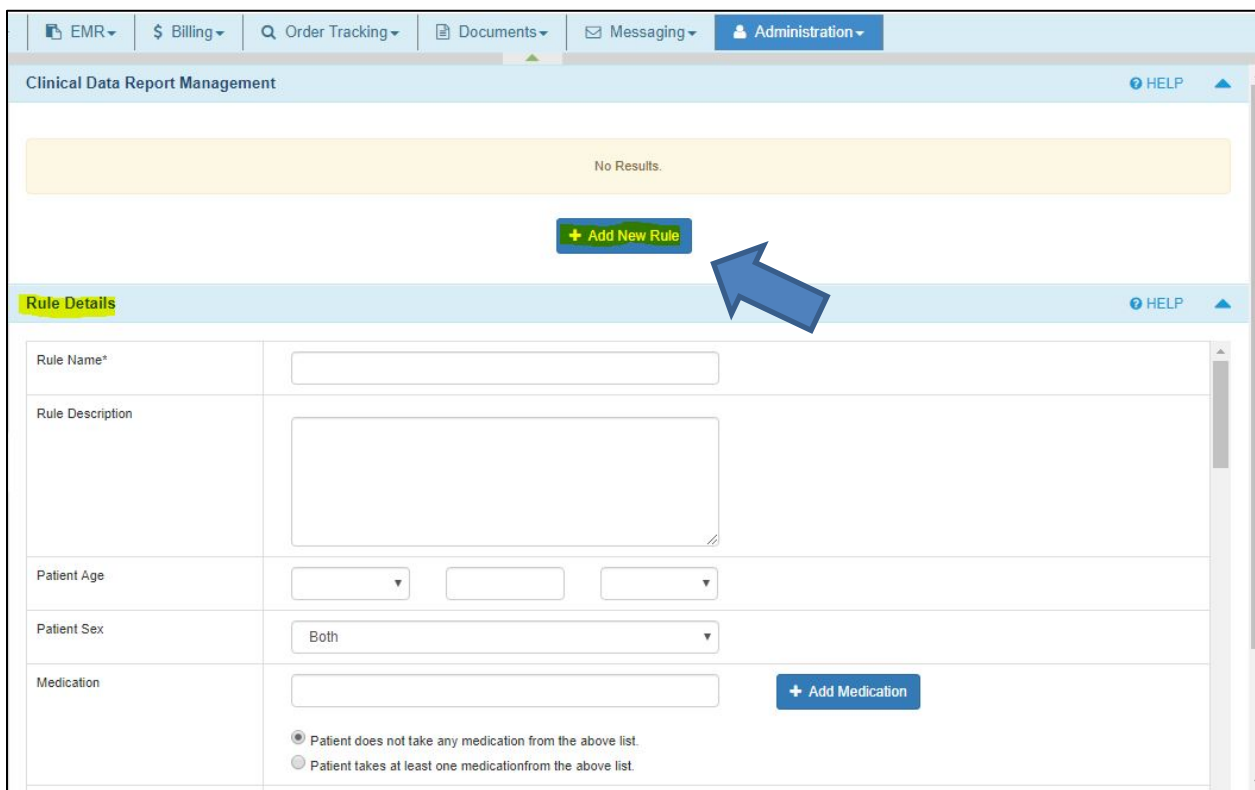
Light Blue = Outstanding Amounts

Clinical Data Reporting Module

Functionality has been added to give users the ability to create lists of patients based on specific clinical data (e.g. diabetic patient list, medication-specific patient list). Like existing **Demographic Reports**, the new **Clinical Data Reports** will generate lists based on parameters specified by the practice. Parameters are similar to those found in existing **Health Maintenance Rules**, but there is no layer of clinical review, alerts, or maintenance associated with **Clinical Data Reports**.

A. Creating a Report

To set report parameters go to **Administration>EMR Setup>Clinical Data Report Setup** and select **Add New Rule**:



The screenshot shows the 'Clinical Data Report Management' interface. At the top, there is a navigation bar with tabs for EMR, Billing, Order Tracking, Documents, Messaging, and Administration. Below the navigation bar, the main content area displays 'No Results.' and a prominent yellow button labeled '+ Add New Rule'. A blue arrow points to this button. Below the main content area, there is a 'Rule Details' section with a form for creating a new rule. The form includes fields for Rule Name, Rule Description, Patient Age (with dropdowns), Patient Sex (with a dropdown set to 'Both'), and Medication (with an '+ Add Medication' button). At the bottom of the form, there are two radio button options: 'Patient does not take any medication from the above list.' (selected) and 'Patient takes at least one medication from the above list.'

Enter a name for the **Clinical Data Report** and select the parameters that you want to apply. Enter any specific data elements to filter by:



This is a close-up view of the 'Rule Details' form. The 'Rule Name*' field is highlighted in yellow, and a blue arrow points to it, indicating where to enter the name for the report.

Diagnosis	ICD 9 <input type="text"/>
	ICD 10 <input type="text"/>
	<input checked="" type="radio"/> Patient has not been diagnosed with any ICD code from the above list. <input type="radio"/> Patient has been diagnosed with at least one ICD code from the above list.
Tests	<input type="text" value="Search and Add Tests"/> <input checked="" type="radio"/> None of the above tests have been ordered for the patient. <input type="radio"/> At least one of the above listed tests have been ordered for the patient.
Tests Due Range	In the last <input type="text"/> OR Between: <input type="text"/> <input type="text"/> And: <input type="text"/>
Test Results	<input type="text" value="Type CPT Code / Description to search"/> <input type="text"/> <input type="button" value="+ Add"/> <input checked="" type="radio"/> None of the above listed test values have been received for the patient.

Height/Weight/BMI		
<input type="checkbox"/> HEIGHT	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> WEIGHT	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> BMI	<input type="text"/>	<input type="text"/>
<hr/>		
Temperature		
<input type="checkbox"/> TEMPERATURE	<input type="text"/>	<input type="text"/>
<hr/>		
Pulse Rate/Pulse Rhythm		
<input type="checkbox"/> PULSE RATE	<input type="text"/>	<input type="text"/>
<hr/>		
Blood Pressure		
<input type="checkbox"/> BP SYSTOLIC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> BP DIASTOLIC	<input type="text"/>	<input type="text"/>
<hr/>		
Respirations		
<input type="checkbox"/> RESPIRATIONS	<input type="text"/>	<input type="text"/>

SNF PSYCHIATRY FORMS

AIMS

BIMS

DISCUS

GDS

MMSE

PHQ-9

None of the above listed vital signs have been recorded for the patient.

At least one of the above listed vital signs have been recorded for the patient.

B. Saving a Report

Pressing **Save** will store it for future use.



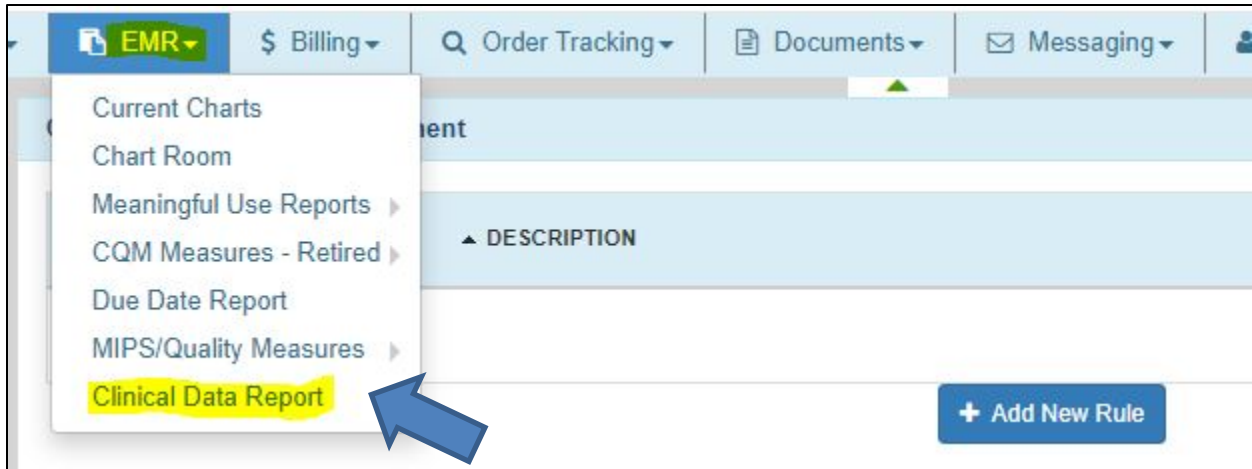
The report will be listed in the **Clinical Data Report Queue** where it can be run again, modified and/or deleted from the Queue:

Clinical Data Report Management			
NAME	DESCRIPTION	CREATED BY	MODIFIED ON
Diabetic List	All Diabetic patients	Resa, Resa on 04/03/2019	04/03/2019

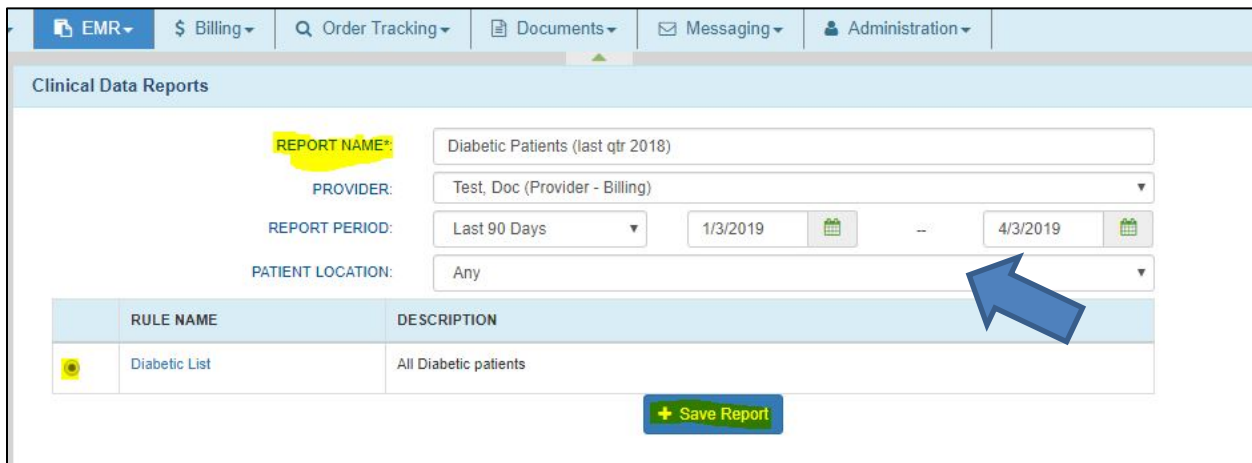
[+ Add New Rule](#)

C. Setting the Report Parameters

To run the report simply navigate to **EMR>Clinical Data Report:**



Select the required details for populating the report and include desired filtering of **Providers**, **Reporting Period**, and/or **Location**. Press **Save** to run and store the report. Select the report and press **Save**:



The report will run overnight and queued for review under **Clinical Data Reports>Saved Reports**. Saved reports can be viewed, downloaded or deleted, as needed:

Clinical Data Reports HELP ▲

REPORT NAME*:

PROVIDER:

REPORT PERIOD: Last 90 Days 1/3/2019 -- 4/3/2019

PATIENT LOCATION: Any

	RULE NAME	DESCRIPTION
<input type="radio"/>	Diabetic List	All Diabetic patients

[+ Save Report](#)

Saved Reports ▲

REPORT ID	REPORT NAME	REPORT MEASURES	CREATED ON	VIEW RESULTS	DOWNLOAD	DELETE
225405	Diabetic Patients (last qtr 2018)	Diabetic List	04/03/2019	View Results		Delete

D. Viewing the Report

Viewing the **Report** will reflect all parameters applied. This includes **Providers, Locations, and Date Range** with a list of matching patients:

REPORT GENERATED ON: 04/03/2019 06:32:08		REPORT NAME: Diabetic Patients (last qtr 2018)		REPORTING PERIOD: 1/1/2018 - 12/31/2018	
REPORT RULE NAME: Diabetic List		PROVIDERS: Provider Test		RULE DESCRIPTION: All Diabetic patients	
PATIENT ID	NAME	DOB	SSN	DIAGNOSIS	
209143	Vanzuuk, Patricia	04/01/1964	105-58-9999	E11.00, 02/22/2019	
2599747	Test, Alberto	11/12/1976	646-37-0009	E11.10, 10/06/2018	
2984143	Test, Alby	04/15/1990	999-99-9999	e11.01, 01/21/2019	
3803819	Test, Abcd	02/03/1975	999-99-9999	E11.01, 02/04/2019	
4462111	Test, Abigail	05/16/2007	999-99-9999	E11.00, 04/01/2019	
4527600	GRACE, TEST	10/31/1993	123-45-6789	E11.00, 10/23/2018	
4905325	TEST, Daniel	06/04/2016	124-24-2142	E11.00, 10/18/2018	
5899190	Test, Victoria	06/22/1954	999-99-9999	E11.00, 08/08/2018	
5899192	Test, Susan	11/03/1950	999-99-9999	E11.00, 08/08/2018	
6015643	Test, Abcdef	12/31/1999	999-99-9999	E11.00, 03/29/2019	
Total # of patients: 10					