



**To:** WRS User Community  
**From:** WRS Development Team  
**Date:** 06/15/2017  
**Re:** Software Release

We are proud to announce the final release of our new scheduler.  
The current “preview” version becoming final on June 22, 2017.

The development process for this project has been a great example of User Centered Design. Over the last six months, we have collected and implemented hundreds of suggestions, needs and ideas from our user community. We sincerely thank you for all of the insightful feedback during this period.

Please note that the existing (old) scheduler will still remain available under **Scheduler>Scheduler (Old)**. We encourage all clients transition to the new scheduler now as access to the “old” version will be removed in the near future.

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# Redesigned Scheduler (live release)

The screenshot displays a medical scheduling interface. At the top, there's a navigation bar with a 'Filters' button, a date range '03/12/2017 - 03/18/2017', and buttons for 'Current Week', 'Day', and 'Week'. Below this, a header for 'Goshen' lists various test types: 'Test Inactive- Test , Ada Provider Test , Doc Test , Nathan Test , Provider Test , Allergy , Dr Double'. The main area is a calendar grid for the week of March 13-17, 2017. The grid shows appointments for different times of the day, with colors indicating different providers or appointment types. For example, on Tuesday (3/14), there are appointments for Ronald First (11:15-11:45), Vivica Fox (12:00-12:30), Michelle Test (12:00-12:15), Test Adam (12:15-12:35), Vivica Fox (1:15-1:35), Suzy Sickness (2:00-2:15), and Dylan First (3:00-3:15). On Wednesday (3/15), there's an appointment for Ronald First (11:15-11:45) and Test Adam (12:15-12:35). On Thursday (3/16), there's an appointment for Vivica Fox (1:30-1:45). An 'Appointment Details' modal is overlaid on the right side of the calendar, showing details for a Tuesday appointment on 03/14/2017. The modal includes fields for 'Location' (Goshen), 'Patient' (VIVICA FOX, 12/31/1990), 'Resource' (Test, Nathan), 'Appointment Type' (Consultation), and a 'Notes' section. It also has a 'Send Email Notification' checkbox and buttons for 'Confirm', 'Reschedule', and 'Update Appointment'. At the bottom, there's a section for 'I Want to Cancel Appointment' with a text input for 'Enter Reason' and a 'Cancel Appointment' button.

**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

Confirm Reschedule Update Appointment

I Want to Cancel Appointment

Enter Reason

Cancel Appointment

# Multi-Provider View (Daily & Weekly)

Tue 5/2	Wed 5/3	Thu 5/4	
9:00 - 9:30 MINDY BOY FIRST PAT	9:00 - 9:15 DEANNA TE DT	Any	Any
Any	Any	Any	Any
Any	Any	Any	Any
Any	Any	Any	Any
Any	Any	Any	Any
10:45 - 11:00 MINDY FIRS PT	10:50 - 11:20 VIVICA FOX PAT	Any	Any
11:00 - 11:15 CANDICE TE PT	Any	11:00 - 11:15 ZOEY TEST PT	Any
11:15 - 11:30 DAISY TEST PT	Any	11:15 - 11:30 DAKOTA TEST PT	Any
Any	Any	Any	Any

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

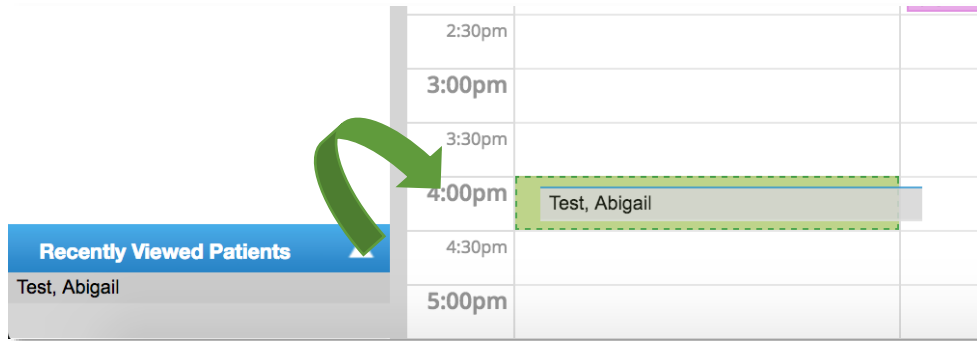
- Schedules can be filtered by Appointment Type and Practice Location.
- Possible Appointment Types are listed within each available appointment slot. Hide these under **Admin>Scheduler Setup>Scheduler Display**

<div> Filters </div> <div> TUESDAY 03/14/2017 </div> <div> Today Day Week </div>				
Goshen				
	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:

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

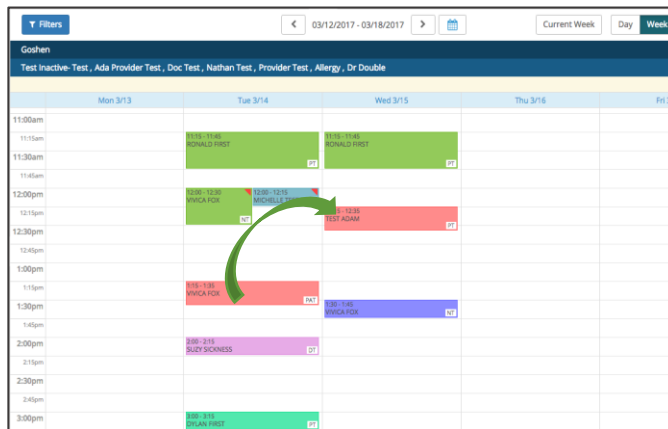
# Drag n' Drop - Patients & Appointments



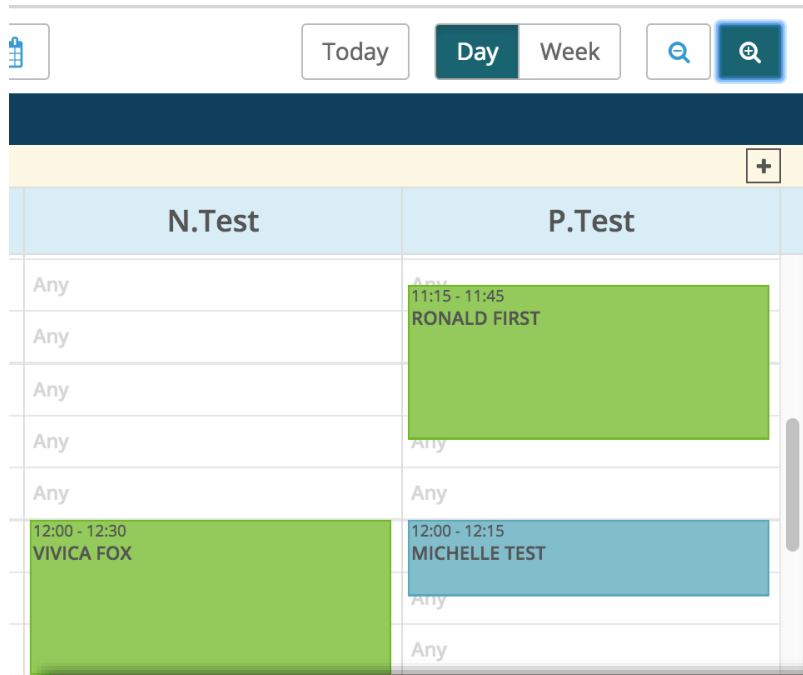
Patient names can be dragged from Recently Viewed Patients and Today's Appointments into the Scheduler. Appointments can also be dragged and dropped between slots in the Scheduler View.

## 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

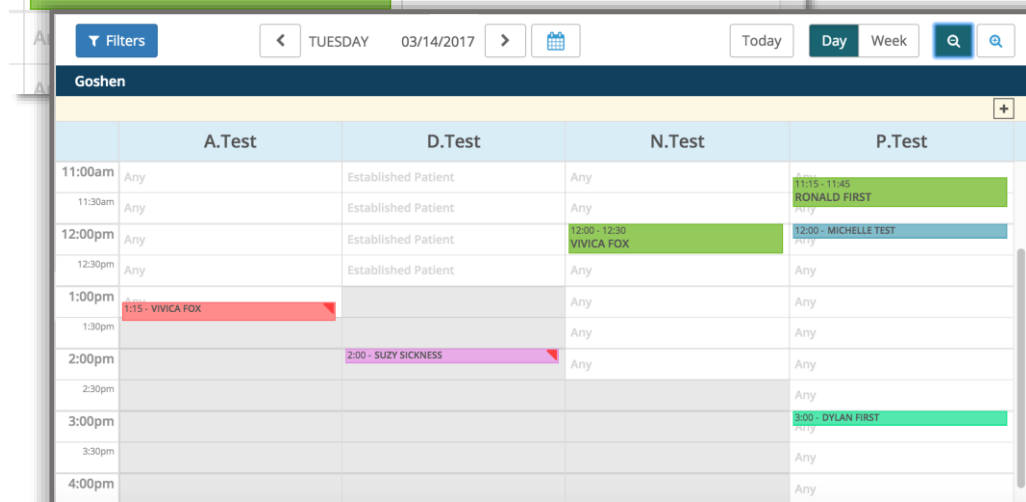


New Zoom In and Zoom Out buttons have been added to all scheduler windows.

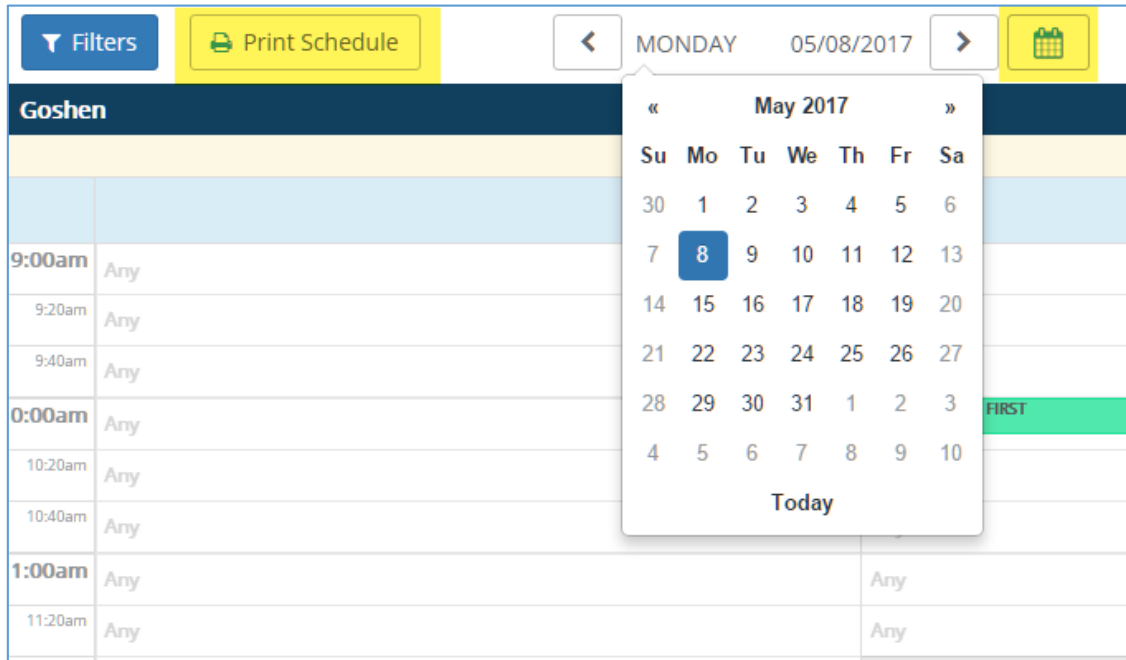
Pressing these easy-access buttons makes your view temporarily larger or smaller.

## 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 & Print Icons



New Calendar and Print Icons have been added to the scheduler window. Pressing these icons allow you to quickly Navigate to an upcoming date and print the current schedule view.

## Workflow:

1. Click on the **Calendar Icon** in the header to view the calendar
2. Click on the **Print Icon** to print the current scheduler view with applied filter choices.



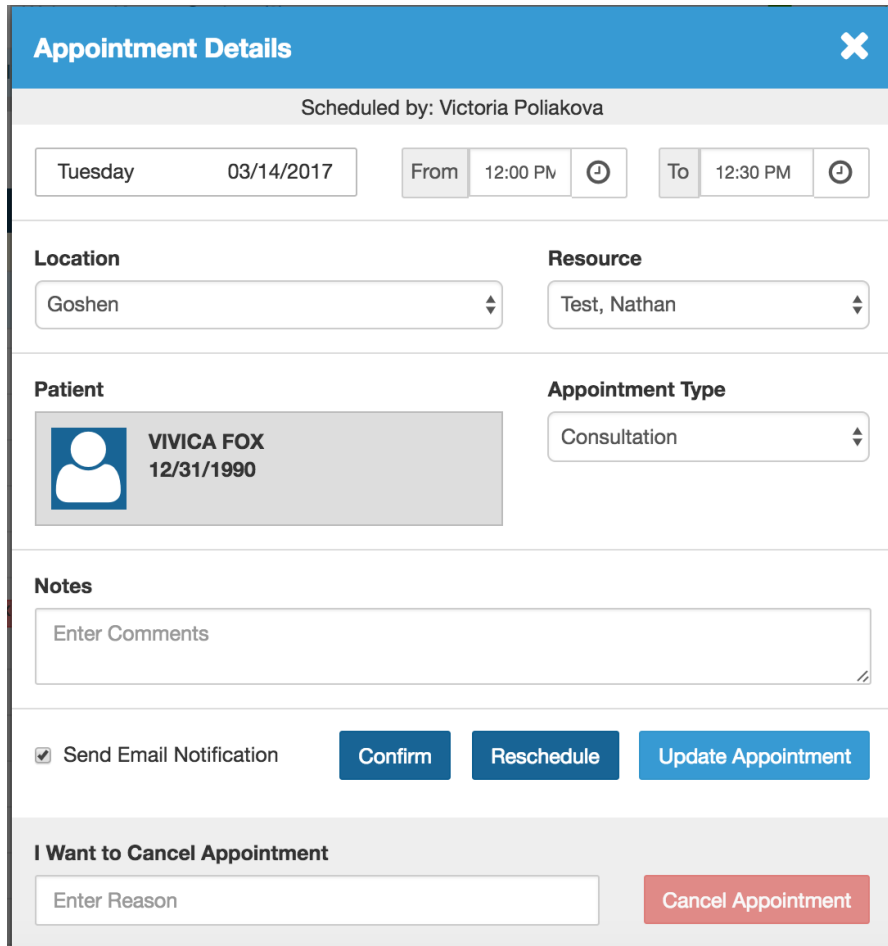
Calendar Icon



Print Schedule

Print Icon

# Rescheduling Appointments



The image shows a screenshot of an 'Appointment Details' pop-up window. At the top, it says 'Scheduled by: Victoria Poliakova'. Below this, there are fields for the date 'Tuesday 03/14/2017', and time slots 'From 12:00 PM' and 'To 12:30 PM'. There are two dropdown menus: 'Location' set to 'Goshen' and 'Resource' set to 'Test, Nathan'. Below these are 'Patient' information (VIVICA FOX, 12/31/1990) and 'Appointment Type' set to 'Consultation'. A 'Notes' section with a text area labeled 'Enter Comments' is present. At the bottom, there is a checkbox for 'Send Email Notification' which is checked, and three buttons: 'Confirm', 'Reschedule', and 'Update Appointment'. At the very bottom, there is a section 'I Want to Cancel Appointment' with a text area 'Enter Reason' and a 'Cancel Appointment' button.

**Appointment Details** ✕

Scheduled by: Victoria Poliakova

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

**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**

☒ Send Email Notification Confirm Reschedule Update Appointment

**I Want to Cancel Appointment**  
 Cancel Appointment

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 Details Box will appear
3. View or edit the details including name, date & time, location, provider and notes. From here, you can also Reschedule and Cancel appointments



# Scheduling Filters

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

The screenshot displays a software interface for scheduling filters. 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, 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

# 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**

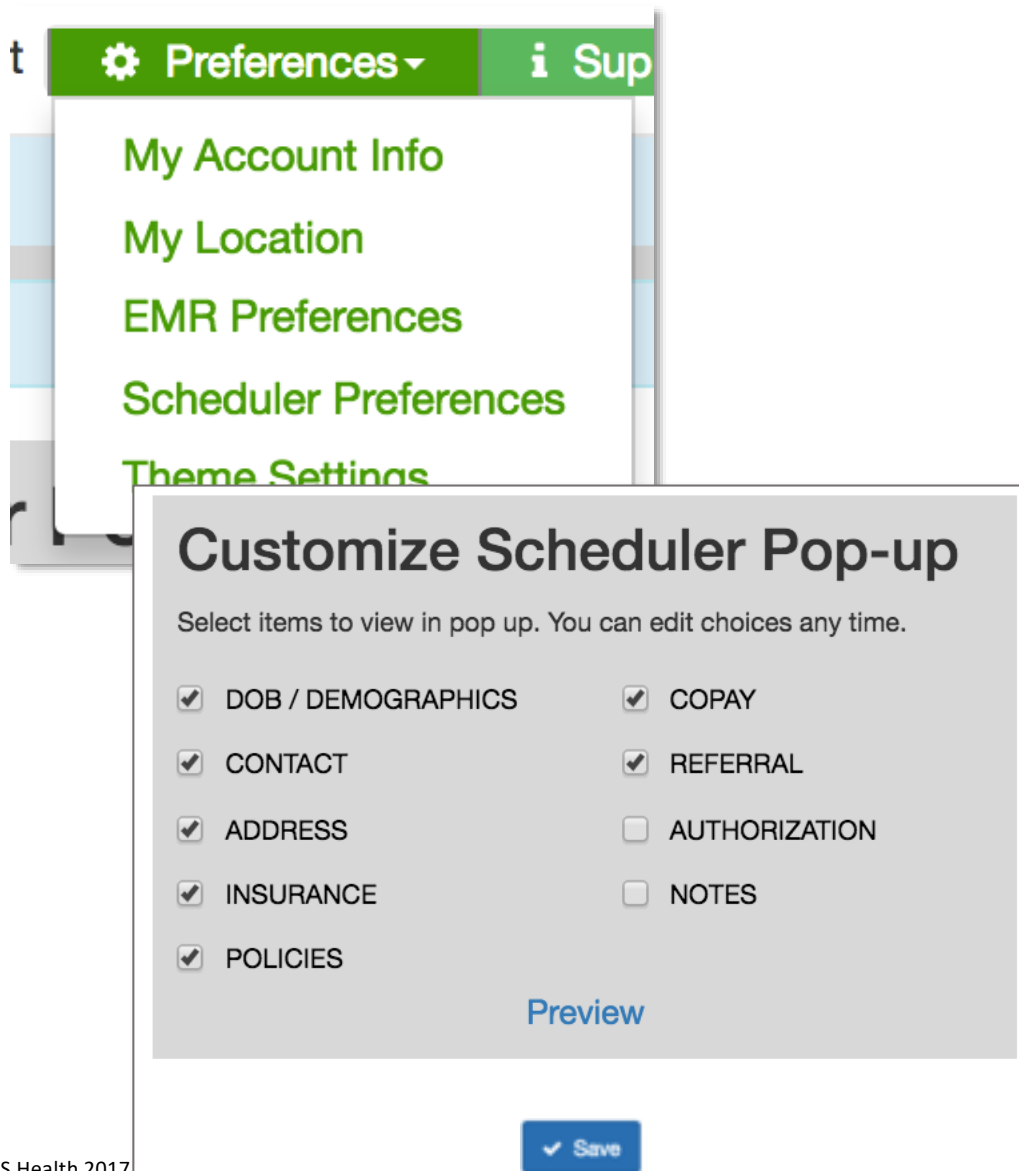
This appointment-specific hover box allows the user to quickly view and collect key data. This is a user-level preference, not a practice setting. To disable this feature, go to **Preferences>Scheduler Preferences** and deselect **Enable Scheduler Popup**.

## 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 Pop-Up Box

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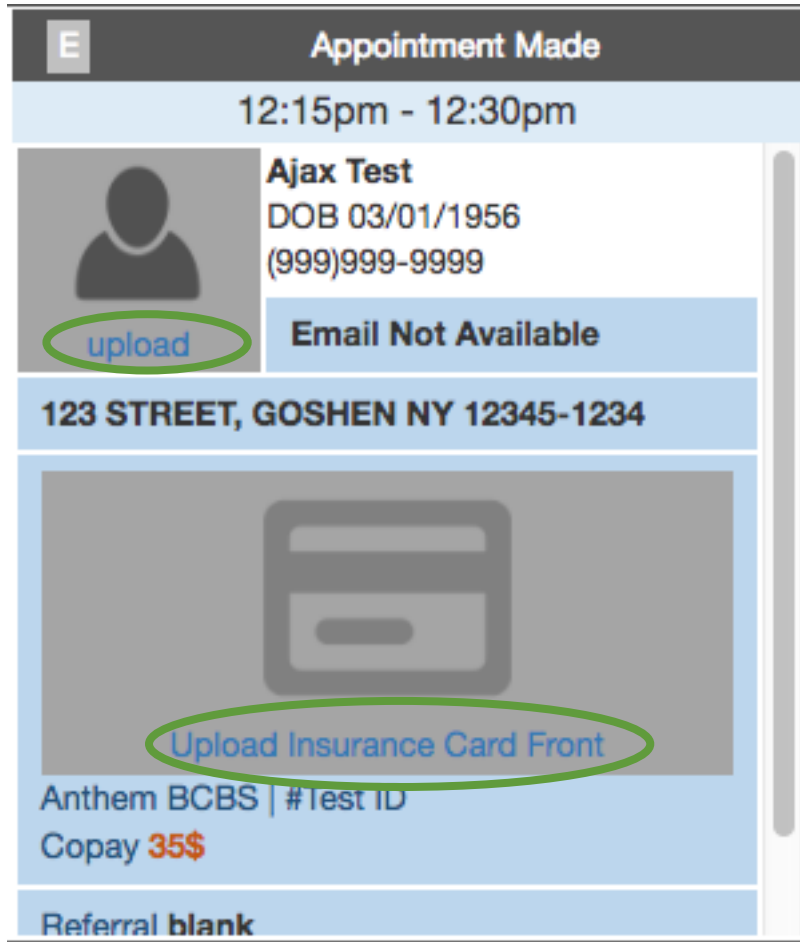


## Workflow:

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 Images to Your Appointment Box

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The screenshot shows a digital appointment box interface. At the top, a dark header bar contains a white 'E' icon and the text 'Appointment Made'. Below this, a light blue bar displays the time '12:15pm - 12:30pm'. The main content area has a white background. On the left, there is a grey silhouette of a person's head and shoulders. To its right, the patient's name 'Ajax Test' is displayed, followed by their date of birth 'DOB 03/01/1956' and phone number '(999)999-9999'. Below the name, a light blue bar contains the text 'Email Not Available'. A green oval highlights a blue 'upload' link positioned below the patient photo. Further down, a light blue bar shows the address '123 STREET, GOSHEN NY 12345-1234'. Below the address is a large grey rectangular area with a faint icon of an insurance card. A green oval highlights the text 'Upload Insurance Card Front' at the bottom of this area. At the very bottom, a light blue bar contains the text 'Anthem BCBS | #test ID', 'Copay 35\$' (with '35\$' in red), and '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

# Scheduler - Visual Enhancements

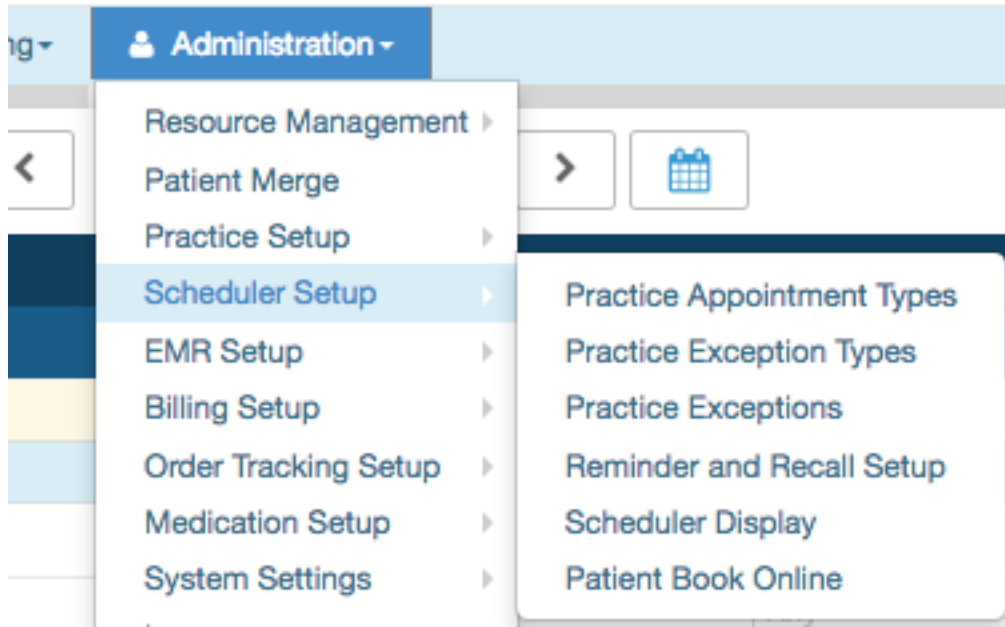
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	Mon 4/3	Tue 4/4
9:00am	Any	9:00 - FOX TEST PT
9:20am	Any	Any
9:40am	Any	Any
10:00am	Any	Any
10:20am	Any	Any
10:40am	Any	10:30 - 11:00 PT RONALD FIRST
11:00am	Any	Any
11:20am	Any	Any
11:40am	Any	Any
12:00pm	Any	Any
12:20pm	Any	12:30 - 1:00 PT FOX TEST
12:40pm	Any	Any
1:00pm	Any	Any

- Colors:** Muted versions of the colors in your scheduler allow for enhanced visibility. These can be changed under **Admin > Appointment Type Details**
- Appointment Labels:** Time blocks are labeled with possible appointments types. Hide these labels in **Admin > Scheduler Setup > Scheduler Display**. Uncheck **Show Appointment Labels**.
- Grid:** Additional grid lines and 15-minute time blocks make it easier to schedule and view appointments
- 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
- Header Bar:** Two different background colors makes it easy to distinguish between your location and selected provider.
- Provider Initials:** Initials are now included in the appointment slot so that it is easy to identify providers at a glance.

# Scheduler - Setup Changes

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The redesigned scheduler will not alter your existing templates, settings or user preferences.

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

# Fax Queue Sender ID

File List			
Unmatched Faxes			
FILE NAME	SENDER		
<a href="#">8455314890_unknownXX2013-12-20X14_1_2_48XXXUnityFaxXX.pdf</a>	Regional Hospital 845-531-4890	10/02/2016 04:51 pm	
<a href="#">2062990981_XXunknownXX2014-09-29X12_44_48XXXUnityFaxXX.pdf</a>	Regional Hospital 206-299-0981	10/02/2016 04:51 pm	
<a href="#">5554444444_XXunknownXX2014-11-19X10_18_32XXXUnityFaxXX.pdf</a>	John Doe 555-444-4444		
<a href="#">2342342342_XXunknownXX2014-11-01X11_11_32XXXUnityFaxXX.pdf</a>	Bob Smith 234-234-2342	10/02/2016 04:51 pm	
<a href="#">8455555555_XXunknownXX2015-02-26X17_02_35XXXUnityFaxXX.pdf</a>	845-555-5555	10/02/2016 04:51 pm	
File Viewer			

The Sender's Name and Fax Number now appears for all faxed entries in the **Fax Queue**.

When a fax arrives your **Practice Address Book** will be cross-checked for fax number. If that number is found, then the name of the sender will displayed in the **Fax Queue**. If no match is found, then the sender's fax number will just be displayed.

# Fax Sender ID - Practice Address Book Setup

Search Address

RST NAM

NAME :

LESS NAM

NUMBER :

Search

ADDRESSES

Add Address

Delete Selected

	FAVORITE	IRST NAM	LAST NAME	BUSINESS NAME		ADDRESS	CITY	STATE	PHONE NUMBER	FAX NUMBER	ACTION
<input type="checkbox"/>	★		Zamora	Test					--	800-000-0000	<div>Edit</div>
<input type="checkbox"/>	★	tesat	WRS TEST	WRS TEST					--	845-531-4890	<div>Edit</div>
<input type="checkbox"/>	★	Mary	Test	Medical Practice	mte	5 East Emblem Way	Staten Island	NY	718-456-4565	718-232-3939	<div>Edit</div>
<input type="checkbox"/>	★	John	Smith	Stanford Associates	jsmith@stam mtarring@stom	22 Leat Drive	Albany	NY	914-236-6060	914-236-6061	<div>Edit</div>
<input type="checkbox"/>	★	Jason	Jones	Acme Associates	jjone:	23 Sylvan Street	Tyran	VA	866-987-2929	866-987-2930	<div>Edit</div>
<input type="checkbox"/>	★	Sam	Spectra	Total Testing		23 Test Drive	Brooklyn	NY	456-464-8737	668-389-4403	<div>Edit</div>
<input type="checkbox"/>	★	Larry	Lumbert	Lawson Assoc	llawson@n	19 Lawson Court	Staten Island	NY	718-949-4949	718-939-3939	<div>Edit</div>
<input type="checkbox"/>	★		Raymond	Test					--	--	<div>Edit</div>
<input type="checkbox"/>	★		Test	Test Only					800-000-0000	000-000-0000	<div>Edit</div>

Practice Address Book can be setup under **Administration>Practice Setup>Address Book**. Instructions are found on the 02-17-16 release notes [https://www.wrshealth.com/sites/default/files/release\\_notes\\_pdf/WRSReleaseNotes021716.pdf](https://www.wrshealth.com/sites/default/files/release_notes_pdf/WRSReleaseNotes021716.pdf)





Please contact  
[support@wrshealth.com](mailto:support@wrshealth.com)  
if you need assistance.

Thank You