Administrative Setup Training Overview

iSupport Settings

Within the ***iSupport*** Dropdown, there are several areas to aid in setup and learning of the system.

****Support:** This is where a user can create a support ticket and/or view current/previously closed support tickets. Each support ticket has its own identifier (ex: **TT#####**). To create a new ticket, you simply click 'New Ticket' and fill in the appropriate details>Submit. Once a ticket has been updated by the WRS team, an email will be sent to the administrator.

Training: Welcome to our Virtual Classroom. This is where you can partake in self-guided training and proficiency monitoring. There are various areas, including:

> **Videos:** Here you will find a wide array of self-guided videos for the different modules of WRS. These videos are accessible 24/7. *You will need Adobe Flash player downloaded to watch these videos*.
>
> **Courses:** Here you will find course overviews, for those that prefer written content over visual.
>
> **Webinars:** Here you will find a calendar of our LIVE webinars. Please note that you can register in advance by clicking on the associated webinar, clicking on the proceeding link, and registering your information. **A plus is these will NOT deduct from any of your paid training time.*
> *****Please note: All webinars are Eastern Time.***
>
> **Release Notes:** Here you will find our latest release notes, including an archive of all releases. A release in WRS refers to New or Enhanced functionality within WRS. The release note will include an overview of the functionality, including benefits, workflow and images of where the functionality can be found.
> ***A copy of the release notes will also be found on your login screen, and through an alert bell at the top of your screen (when applicable).*
>
> **User Guides:** Here you will find an overview (written) of our User Guides, explaining tasks within each domain.
>
> **Directory:** Here you will find an overview of our departments, including email, phone, and/or fax numbers.

Implementation – This is your Implementation Queue "IQ". This is where we monitor the status of your Implementation to ensure setup and configuration is being completed in preparation for a smooth Go-Live.

Download – This area is used as a centralized location to include files such as add-on setup files, including, but not limited to our digital pen and medical card scanner.

To setup a user with access to create a support ticket, please go to ***ADMINISTRATION>SYSTEM SETTINGS>SUPPORT SETTINGS*. Highlight any users that should have access, by holding down the Ctrl button on your keyboard and clicking on their name.

To Setup a user to receive an email notification that there has been a response placed on the ticket, please also add their email in the email field and save.

Patients Tab

Demographic Reports

Demographics reports are used to obtain demographic information on a large set of patient accounts, at once, rather than going to each individual account to obtain. **It is important to note that these reports will require to run overnight before data is available.*

To create a demographic report, go to ***PATIENTS>DEMOGRAPHIC REPORT***.

From here, you will select your filters (the areas of the system that data will be extracted from). It is also important to note that as part of your front desk workflow training you will learn that within the patient management area of an account, you can designate a location(s) to a patient. If you do this, you can then select a location(s) under the location field. If you opt **NOT** to match a patient, then **DO NOT** select a location(s) as it will not yield any results, as no patients would be directly related to any location.

Now that your filters are selected, you will move on to selecting your display characters (demographic information), which is the information sets you are looking to populate into your report. Please note that you can also choose 'Print Order' (how the columns appear in row order), in addition to 'Sort Order', meaning your report will appear A-Z (ASC), Z-A (DESC) or N/A.

Once completed you will click Run Report (Again, this will take over night to run).

The next day, you can go back to ***PATIENTS>DEMOGRAPHIC REPORT*** and scroll to the bottom of the page to access your report. You will note that each report has a Report ID, Report Name, Created On, Created By, in addition to three options:

Option 1 – 'View Results'- This will allow you to view the results in a new window screen.
Option 2 – "Export" – This will allow you to export the file to a .csv excel file.
Option 3 – Delete – Since no reports will automatically delete, this will give you the option to manually delete a report.

Administration Tab

Adding a New Employee

To add a new employee, go to ***ADMINISTRATION>RESOURCE MANAGEMENT>RESOURCE SETUP>ADD EMPLOYEE.***

From here, you will have three resource option types (Healthcare Provider – Billing, Healthcare Provider – Non-Billing, Non-Healthcare Provider).

For Healthcare providers, you will choose if they are billing (submitting claims to clearinghouse) or non-billing (cash only or submitting under a supervising provider) providers. You will then input the provider information and select 'Search'. From here, a support ticket will be submitted on your behalf. A member of the support team will then reach out to you for the necessary paperwork to add that provider to WRS.

For a non-healthcare provider, you will choose that resource type, inputting the resource's information and selecting 'Save'. The user will now be added to your site.

Resource Permissions

Go to ***ADMINISTRATION>RESOURCE MANAGEMENT>RESOURCE SETUP>CLICK ON USERS NAME>PERMISSIONS TAB.***

You can choose from the security drop down options, and from there tweak, by selecting/de-selecting certain permissions>then save.

Permissions are broken down into different areas of the system. Many have options of 'View, Add, Edit and Delete', while others have just one box available which signifies that the permission is an "all or nothing permission".

**Please note that there is an option called "No Permissions". This is used when a resource leaves the practice. It is advised not to delete a user outright as it can cause loss of data, directly tied to patient's accounts. Instead, you can mark the resource as inactive, remove their email and password (even update username) and then give 'No Permissions'.*

Resource Restrictions (*Optional*)

Go to ***ADMINISTRATION>RESOURCE MANAGEMENT>RESOURCE SETUP>CLICK ON USERS NAME>RESOURCE RESTRICTIONS TAB.***

Here you have the option to set:

> **Patient Restriction**: Here you can restrict a user from a specific patient(s)
> **Location Restriction**: Here you can restrict a user from a specific location(s)
> **Time Restriction**: Here you can restrict a user based on time – regarding system usage allowance
> **Save once assigned*

Provider Schedule Template

Creating a new provider template:

To create a provider schedule template, go to ***ADMINISTRATION>RESOURCE MANAGEMENT>RESOURCE SETUP>CLICK ON PROVIDER NAME.*** From here you will click on the provider's schedule tab and complete the following steps as necessary. *(*please note, more than one template can be created, per provider).*

Step 1: Click on 'Resource Scheduler Display Settings' and enter:
a. Select the EARLIEST time this provider will ever see a patient
b. Select the LATEST time this provider would ever end his/her appointments
(this will need to be the END of the apt as it needs to provide 'wiggle' room to be able to book the last apt)
c. Select the smallest time interval for the provider's appointments
d. You can deselect Saturday and Sunday if your provider does not work on those days, so they do not appear in weekly view
e. Select 'Submit' and then 'Back to Schedules'

Step 2: From the Schedule tab:
a. Select your location
b. Select your option for Appointment Type (Appointment Type can be left to 'Any', which means any type of appointment can be seen, or you can create template based on a specific appointment types)
c. Select 'Make New Schedule'
d. Effective Date will default to one year – this can be extended if desired

e. Recurrence should be selected as weekly, every other week, ever 3 or every 4 weeks, depending on the provider's availability
f. Select 'Continue'
g. From here you will individually (or click and drag) the time parameters that the provider is available to see patients on any specific days/times. Any box in red signifies that the provider is AVAILABLE to see patients. While any box shaded grey means they are UNAVAILABLE.
h. Please note – for any break time, leave box open so patients can't be booked
i. Select 'Save'

Creating a Non-Healthcare Provider Template:

To create a non-healthcare template (*a template not based on a single provider, but rather, a service – i.e., Allergy Testing, Ultrasound, Aesthetician, etc.*) this must be done in two steps.

Step 1: Go to ***ADMINISTRATION>RESOURCE MANAGEMENT>NON-HUMAN RESOURCE TYPE SETUP***. From here you will select 'Add New', creating a Name and Description (*optional*) and selecting Save. Step 1 is now completed.

Step 2: Go to ***ADMINISTRATION>RESOURCE MANAGEMENT>RESOURCE SETUP>SELECT NON-HUMAN RESOURCES TAB.*** From here you will select 'Add Resource' and rename the Resource and select the resource type, as the type (name) you just created in step 1. (UPIN, NPI, Description are all optional fields). Select Save and step 2 is now completed.
*******Once steps are completed, you can now follow the process of creating a template by clicking on the non-human resource and going to the schedule tab.*

Creating PERMANENT Changes to the templates:
To create a permanent change to the template, you will want to go to the provider's schedule tab and select on 'View Current Schedules". From here, select the effective date, alter the template, by removing or adding time and select 'Save'. This will change the template going forward, on a permanent basis.

Exceptions

****Positive Exceptions:*** This is when a provider is usually unavailable, and you would like to **ADD** time to their schedule
****Negative Exceptions:*** This is when a provider is usually available, and you would like to **REMOVE** time to their schedule.

Exceptions Types

Go to ***ADMINISTRATION>SCHEUDLER SETUP>PRACTICE EXCEPTION TYPES>ADD NEW***
This is where you will decide if the exception is Practice Wide or Resource Specific and Negative (unavailable) or Positive (available).

Creating Exceptions

To create a resource specific exception, go to ***ADMINISTRATION>RESOURCE MANAGEMENT>RESOURCE SETUP***. Select the provider's name and go to the schedule tab. From here you will select "Schedule exception" (far right), add your location, exception type and 'make new exception'. Once you input the date and time field, this will then create the exception on the provider schedule. This can easily be removed by going to the same area as it was created, selecting 'View Exceptions' and selecting delete and OK, which will then update the template to reflect its original state.

To create a practice wide exception, go to ***ADMINISTRATION>SCHEDULER SETUP>PRACTICE EXCEPTIONS***. From here you will select "Schedule exception" (far right), add your location, exception type and 'make new exception'. Once you input the date and time field, this will then create the exception on ALL provider schedules. This can easily be removed by going to the same area as it was created, selecting 'View Exceptions' and selecting Delete and OK, which will then update the template to reflect its original state.

Patient Merge

In the instance that you have a duplicate patient account, it is strongly recommended that you merge the account so that you do not have separate charts, where information can be misplaced or lost. To perform a merge, go to ***ADMINSITRATION>PATIENT MERGE***. From here you will enter *as much* demographic information as possible and select 'Search'.

The system will now generate any potential matches the system finds for duplication. You will notice that there has populated a "Primary Patient Record" as well as a "Secondary Patient Record". Each duplicate account will show twice, once under each column. The one you will designate as the primary account will be the one that has the most recent/up-to-date demographic importation. This is because although ALL data (clinically and/or billing, etc.) will be merged to one account, the only demographic information that will be used going forward is the account that is listed as Primary. You will then, after designating your primary and secondary accounts, be asked to verify that the patient is a duplicate, by verifying the data.
*****Please note, once a merge is completed, it CANNOT be undone***. Once you are sure, you can select Merge and the two files will merge into one single patient account file.

Appointment Types

Go to ***ADMINISTRATION>SCHEDULER SETUP>PRACTICE APPOINTMENT TYPES>ADD NEW.***
To create an apt, you must have Apt Type Name, Abbreviation and Length included. All other features are optional.

Reminder and Recall Setup (Recording your Voice Messages)

Instructions for Recording Reminder and Recall Messages

Practice Waiting Room Solutions ID: ####### (found on page)

You can have only one appointment reminder message and one appointment recall message per practice.
You will need to know your practice ID before recording your message. This is available at the top of this page.
For appointment reminder calls, the system will generate a date and time to be added to the end of your recorded message.

Instructions for Recording Appointment Reminder Message

Call the WRS Health number 866-977-4367 or 646-912-6634.
Enter extension "870" when the system answers the call.
Enter your practice ID number (**#######**) at the prompt. Record your appointment reminder message using words such as: "Hello I'm calling from <Practice Name> to remind you of your appointment on…"
After your recorded message the appointment date and time will be electronically created and added to your message for each individual reminder.

Instructions for Recording Recall Reminder Message

Call the WRS Health number 866-977-4367 or 646-912-6634.
Enter extension "871" when the system answers the call.
Enter your practice ID number (**#######**) at the prompt.
Record your appointment reminder message such as: "Hello I'm calling from <Practice Name> to let you know that it is time to make a follow up appointment. Please call our office at <Office Number> to setup your appointment;" or "Hello, this is <Provider Name>. I'm calling to remind you that it is time to make your follow up appointment. Please call the office at <office number> to setup your appointment."

Instructions for Listening to Recorded Messages
Call the WRS Health number 866-977-4367 or 646-912-6634.
Enter extension "872" for Appointment Reminder or "873" for Recall Reminder.
Enter your practice ID number (**#######**) at the prompt.

Customizing Patient Email Templates

Go to ***ADMINISTRATION>SYSTEM SETTINGS>PATIENT EMAIL TEMPLATES***
From here you can edit (and save) the following templates:

- **Welcome Email** - sent after patient is registered, IF email is captured at time of registration
- **Appointment Confirmation** - sent when apt is created
- **Appointment Reminder** - sent 'x' amount of days in advance with phone call and text message, timeframe assigned during administrative setup

Logs

Logs allow you to view what is going on in "the back end". Through these three logs, you will be able to see what is happening on a user and patient level. Each log will provide time stamps, IP address, Resource, and event. Each log can be 'viewed' or easily pulled to an excel file.

Security Log: This log will allow you to view resource level changes to their accounts, including password resets, login resets, account changes, permission changes, and deletion of resources.

Clinical log: This log will allow you to view both patient level and recourse level activities, including: Login/Out events, Patient Merge, registering a patient, viewing a health record, creating a note, creating a pharmacy, etc.

Emergency Access: This log is used in reference to a user that has a time restriction on them. With any time-restriction, the restricted user would receive an error message of "Insufficient Privileges" should they attempt to log in during a restricted time. However, if the same user has the permissions called 'Emergency Patient Info Access', this permission will overwrite the restriction, so that in the case of an emergency, the user can log in to the system. However, instead of having full access, they will be redirected to the Emergency Access tab, where the system will time stamp the user's login information, and require the user to state which patient account they are looking at, and what the reason is that they are logging in. This will then allow the administrator to see who has been logging in during restricted times.

Additional System Tips

Scheduler Tab

Patient Recall (*multiple ways to create*):

A. By going to ***SCHEDULER>PATIENT RECALL***
B. Search the patient's name from Quick Search and select on 'Patient Recall'
C. Hover over the patient's name and select 'Patient Recall'

To create a recall from any of the above areas, you will search the patient's name (unless you are using options B/C – where the name auto-populates) and you will then create when the recall is set for (time parameter). You can also assign an apt type and a resource if needed and this will reflect when the patient should be "seen by".

To view a recall, from the queue (***Scheduler>Patient Recall***) you can search recalls and you will have a master list of anyone with a recall, based on the parameters set in the search criteria. This list can also be sent via email or printed off.

Administration Tab

To customize your practice settings (i.e., # of login attempts, password pattern, registration setup options, etc.), go to ***ADMINISTRATION>SYSTEM SETTINGS>PRACTICE SETTINGS***. From here you can customize, enable/disable settings in relation to the system. Select 'Save' once desired parameters are set.

Preferences Tab

User Preferences

Each user has their own set of system preferences. These can be setup by going to the ***Preferences*** Dropdown (top right).

My Account Info: This area will show an overview of the user's personal account details, including General User Details, Permission and Restrictions. This is where a user can update his/her username and/or password if needed.
My Location: This area will allow a user to easily change locations without the need to log in/out of the system.
EMR Preferences: This area will allow a user to designate EMR preferences such as EMR Section Navigation and Default Note *(*more tailored to a provider)*.