Master User Manual

Facility Administrator Version

Revised May 11, 2020

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Welcome to WebChartMD!

WebChartMD launched in 2006 as a workflow platform to assist medical transcription companies and departments process clinical documentation more efficiently.   Since then, over 15 million transcriptions for over 40,000 healthcare providers have been transcribed by thousands of medical language specialists.

One of the key benefits of having so many users over so many years has been their invaluable input in how to improve the system. This manual represents the most current revision (2019-2020) of our User Manual and includes instructions on hundreds of new features that we've added over the last few years – many of which began as suggestions given by clients.

In addition to new features, this version of the manual contains links to videos which give quick overviews of how a respective feature works. Those same videos – along with the User Manual sections related to different areas of the system – are posted within the WebChartMD platform for easy access.

To all of our clients who have helped us make WebChartMD one of the premier clinical documentation workflow platforms in healthcare today, we say *thank you!*

Please let us know of any comments or suggestions you might have as you use this manual by emailing us at support@webchartmd.com.

As an FYI, we've used fictitious patient information taken from our demo accounts in all screen shots taken throughout this manual.

Sincerely,

The team at WebChartMD

Glossary of Terms

A number of different terms are often used interchangeably in medical transcription to mean the same thing, and for the sake of consistency and clarity, the following terms are used throughout the document.

Tip: terms that appear in title case throughout the manual (e.g. Transcription Team) are defined within this Glossary of Terms.

Dictation: The voice file that is yet to be transcribed into written content is referred to as a "dictation".

DID: The DID, short for "Dictation ID", is a unique 8 digit number assigned to a dictation.

DocHandler: A downloaded application that performs a number of tasks related to document management in the WebChartMD system. Most notably, it enables users to access transcriptions via their locally installed copy of Microsoft Word.

File: A generic term to describe either a dictation or a transcription as it moves through the workflow and is presented in any of the various screens within WebChartMD. File is used to replace and standardize other synonymous terms that could be used such as "row" (as in a particular row within the portal), "record", "dictation" and "transcription".

Facility: The healthcare entity serviced by the Transcription Team. For the purpose of this manual, Facility is used synonymously with location, department, and office.

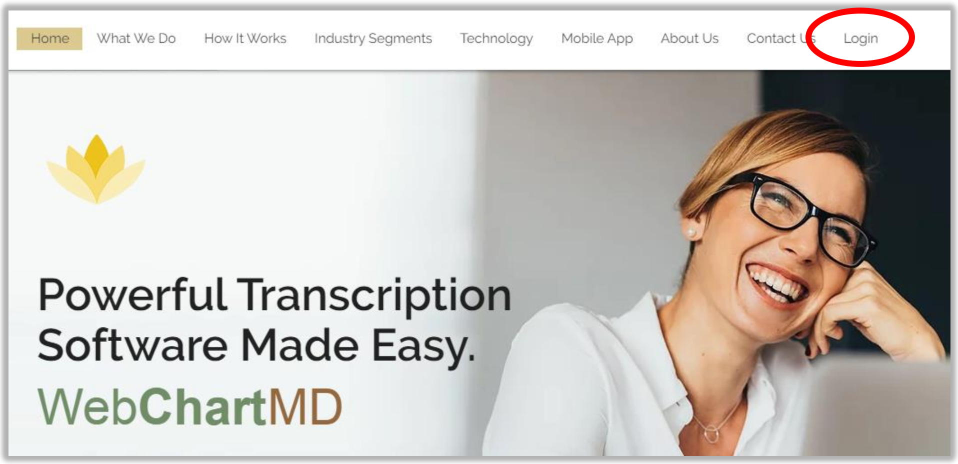
Healthcare Provider: A user that authors the voice files, referred to in this manual as the Healthcare Provider.

Transcriber: A user that listens to the audio dictations and types it into Word as text.

Transcription Team: the group of transcriptionists providing service to the Facility. The Transcription Team could be an outside vendor (Transcription Team), or an in-house transcription department.

Logging into the Portal

The website can be reached at www.webchartmd.org. Once there, the link for the Portal login page appears in the top right-hand side:

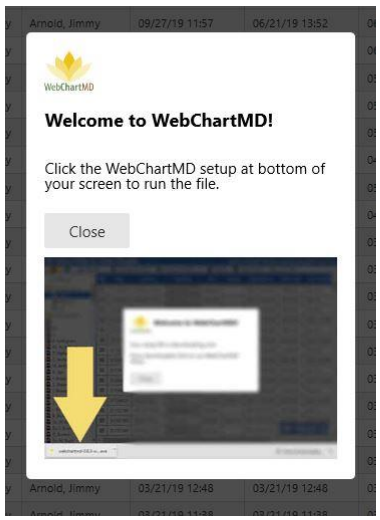


Enter your username and password in the fields and click on the Login button. If the username and password are correct, it will log in to the portal. If incorrect, a message will be displayed indicating that it is incorrect.

Software Installation

The first time a user logs into WebChartMD, the system installs a small application that enables the locally installed copy of Microsoft Word to interact with WebChartMD. This application is referred to as the “Doc (for document) Handler,” Or DocHandler.

The first step of the installation process is for a pop-up to appear on screen, indicating the DocHandler is downloading.

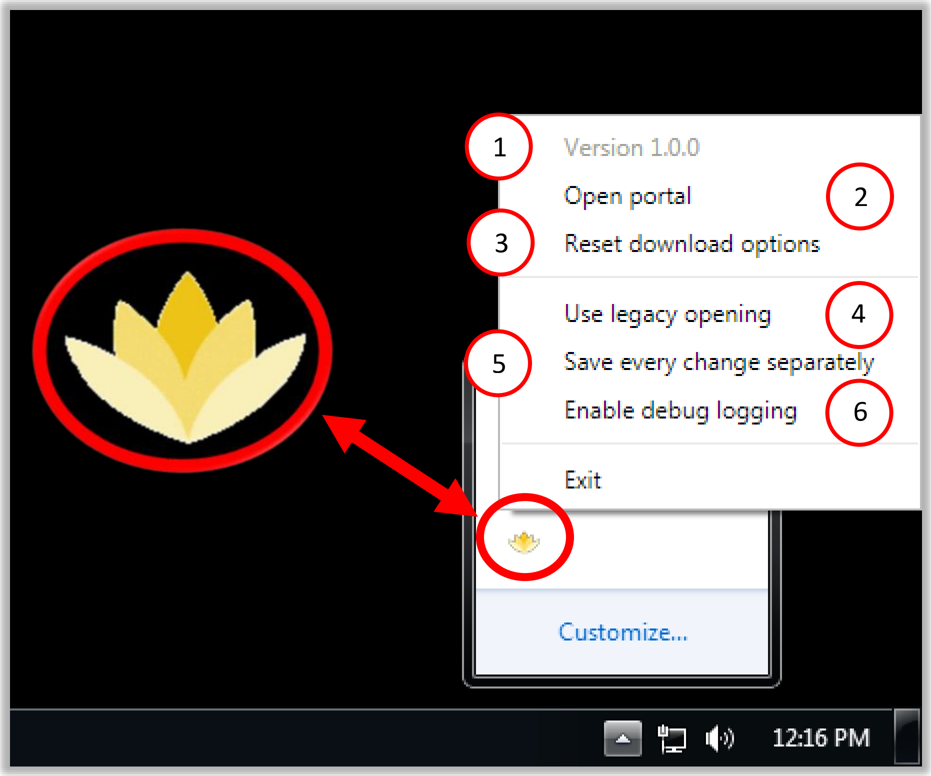


Once the download is complete, click the downloaded file to install it.

Please note: The DocHandler only needs to install once per computer, regardless of how many users are accessing WebChartMD from the computer.

DocHandler

Once the installation is complete, a small yellow lotus icon of WebChartMD appears in the bottom right-hand corner of the user’s screen indicating that the DocHandler has installed successfully.



Right mouse-clicking the logo causes the following menu items to appear:

1. Version number: The current version of the DocHandler. The DocHandler updates automatically when new versions are available.

2. Open portal: Clicking this option launches the WebChartMD Login page. WebChartMD is compatible with Internet Explorer (version 10 and 11), Google Chrome, Mozilla Firefox, Safari and Opera.

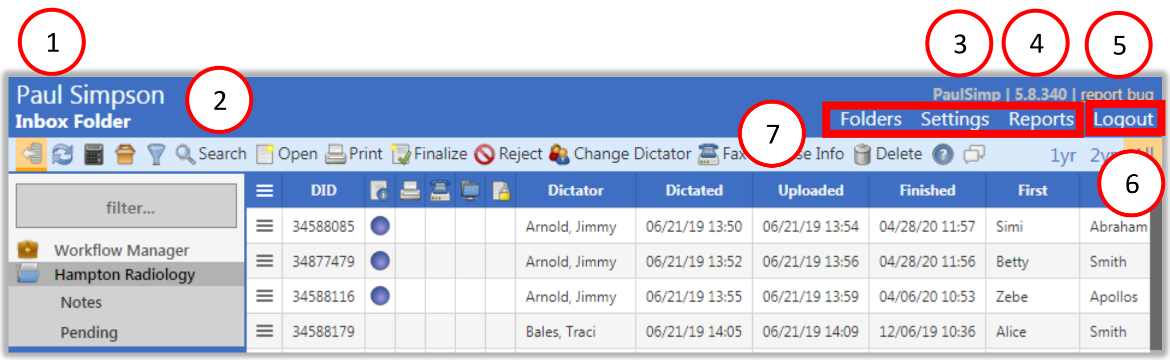
3. Reset download options: This option works in conjunction with the Download option of the dictations (on page 44) resetting both the file naming convention and preferred download location as set by the user.

4. Use legacy opening: This option is used by WebChartMD support staff to troubleshoot the DocHandler.

5. Save every change separately: Checking this option enables the user to manually save edits to a document on demand by using the control+S shortcut or pressing the “save” icon along the top edge of Microsoft Word.

6 Enable debug logging: This option is used by WebChartMD support staff to troubleshoot the DocHandler.

Initial View When Logging In



1 Name

The **Name** of the folder currently being accessed is displayed in the top left corner.

2 View and Folder Name

The **View Name** is displayed right underneath the user' name. The view name changes as the user navigates to different folders and comes in handy when visiting different folders.

3 Username

The **Username** that is logged into the current session in displayed in the top right.

4 Version Number

The **Version Number** is displayed next to the username.

5 Report Bug

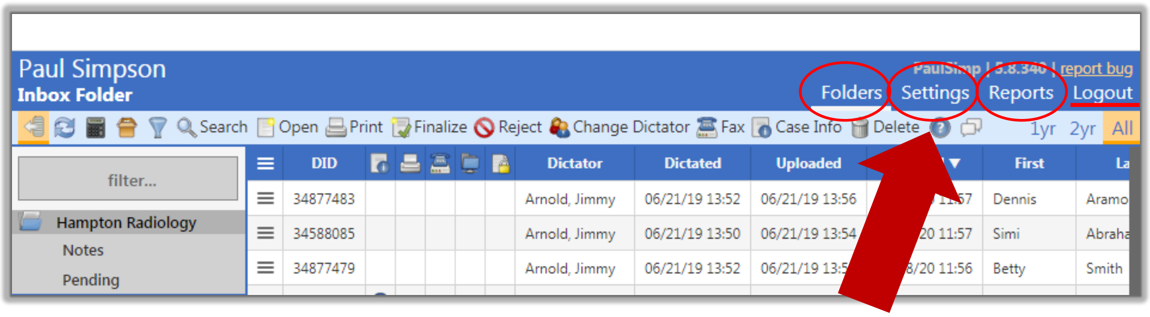
The **Report Bug** link allows the user to send notes back to the developer on any bugs encountered while using the application.

6 Log out Button

The Logout button logs the user out of the Portal, ending the current session

7 System Functional Areas (Views)

The **System Functional Area** links allow the user to navigate to different parts of the Portal.

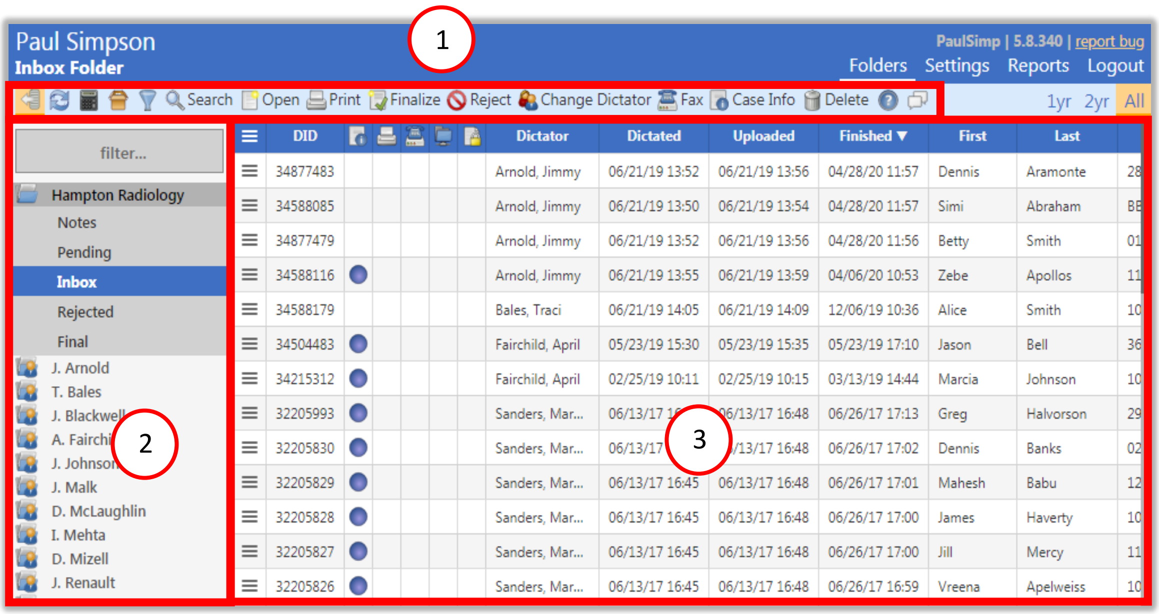


- **The Folders view** displays the folders in which the dictation and transcriptions are accessed. transcriptions. More details can be found on page 14.
- **The Settings view** accesses the various workflow settings used by the Transcription Team and healthcare Facilities. More details can be found on page 71.
- **The Reports view** displays the Reporting suite. More details can be found on page 112.

Folders View

Folder View Overview

The Folders view loads by default when users first log in. It is also accessed by clicking the “Folders” link in the top right-hand corner of the screen. The Folders view can be broadly grouped into three visual areas:



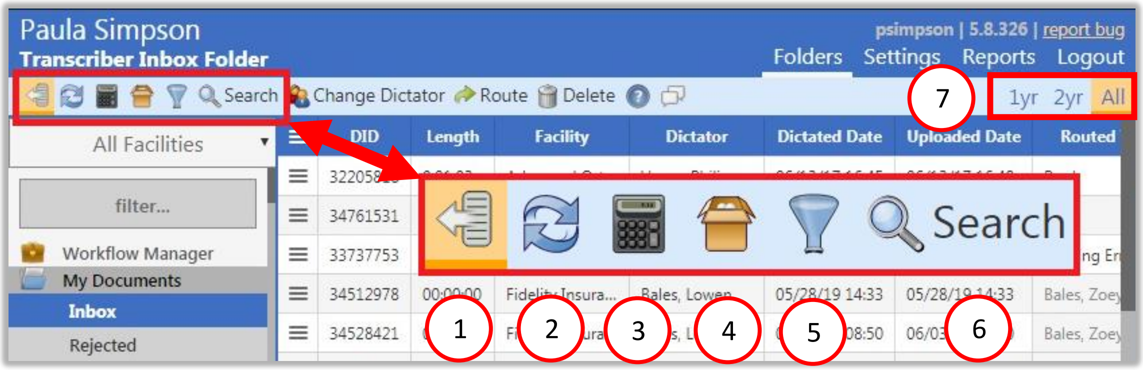
1 **Workflow Management Toolbar**: Along the top edge of the Folders view is the Functions Ribbon, or toolbar, which contains buttons used to perform various workflow related tasks.

2 **Folder Pane**: Displays all folders used in the workflow.

3 **File Display**: Displays all dictations and transcriptions in the workflow.

Folder Management Functions

Tools within the Folder Management toolbar vary according to the folder and permission levels of the user. However, the first six icons from the left are always constant for all users across all folders. These are:



1 **Pin Sidebar** – This toggle button shows or hides the folder pane containing folders below the All Facilities column.

2 **Refresh** – Refreshes the data on the page. This can be used to refresh the view after moving columns, changing flags or after closing a document to update the data displayed.

3 **Show Totals** – Shows total across the top of dictations in a grey row. This helps the user see the number of dictations and other information at a quick glance without having to calculate. Number of dictations and total length of all audio files are two common uses.

4 **Sort By** – Groups the dictations based on selected criteria such as a specific date or a Healthcare Provider.

5 **Filter** – Adds filter boxes underneath column headers, allowing user to filter the data. The user hides dictations based on excluded data and only views the filtered results.

6 **Search** – Allows the user to search the files for specific information.

The Search function is found in almost every folder view and provides the user with the ability to quickly search for a dictation or transcription by using one or multiple search criteria.

Clicking the "Search" button in the toolbar opens the "Filter Criteria" search fields.

Fields requiring explanation:

- The "DID" field represents the unique 8 digit Dictation Identification number.
- The "Uploaded from" and the "Uploaded TO" fields work together to display dictations that were dictated during a specific date range.

- The “Filename” field allows the user to search for a specific dictation using the name of the audio file. The audio file name has a specific naming format:

File Name
jarnold-12182019-123801.wav

“jarnold” – Healthcare Provider’ username
“12182019” – date of dictation: 18th December 2019
“123801” – time of dictation in 24hr format: 12:38pm
“wav” – audio file format of .wav

The user can use that specific format (including the dashes) to search for a specific audio file.

- The “Job#” is a unique JobID that is provided to the Healthcare Provider at the end of their dictation when calling into a phone line. The user can also search for a specific JobID as needed.

- The “First” and “Last” fields allow the user to search for the patient’ first and last names respectively.

- The “ID#” field allows the user to search for the patient’ MRN number.

Once the search criteria have been entered, the search can be performed on the last 12 months by clicking “Search Past Year” or the entire database for all years by clicking “Search All”. Please note: results will return more quickly if “Search Past Year” is selected.

Once the selection is made, search results will appear on screen below the Filter Criteria box. To close the Search box, click the “Close” button in the Filter Criteria box.

7 Data Filter – The labels “1yr”, “2yr” and “All” refer to the age of reports will be visible on screen in the folder. “1yr” shows reports transcribed in the last year. “2yr” shows reports transcribed in the last two years. “All” shows all transcriptions transcribed for any date.

Special notes on the use of this feature:

- The shorter the time interval selected, the faster the folder’s content will load.
- All transcriptions regardless of the date are always available for access on the system by using the Search feature.

Several other folder management functions appear on the Workflow Management Toolbar, depending on which folder the user is in. Details of these functions are provided in the individual folder details starting on page 46.

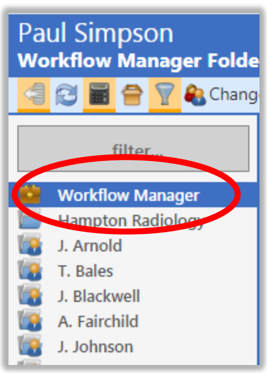
Folders

There are four main folder sections that are part of the Folder Pane. They are:

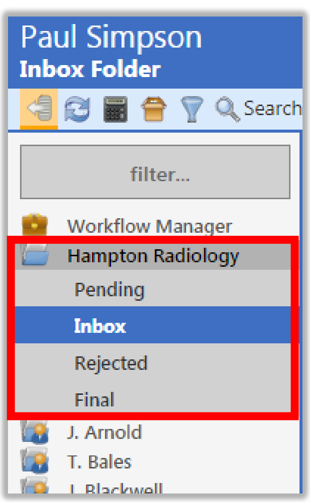
Workflow Manager: The "Workflow Manager" is a powerful tool that provides quick and easy access to all dictations and transcriptions available in the system. More information on the Workflow Manager can be found on page 21.

Facility Name: The folder containing the user folders is named with the Facility name. It shows the dictations and transcriptions to the Facility admin. More information on Facility documents can be found on page 46.

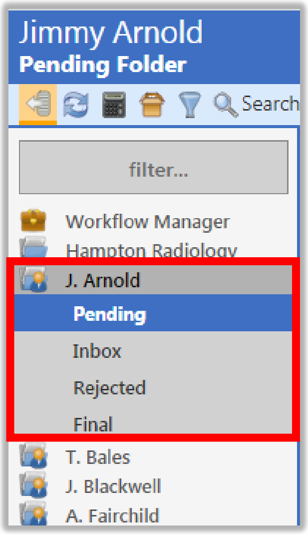
Healthcare Provider Folders: Below the "All Documents" and its folders are the Healthcare Provider Folders. These are laid out alphabetically by the last name of the provider. More information on Healthcare Provider Folders can be found on page 64.



The Workflow Manager folder is selected.



The Inbox folder within the "Named Facility" is selected.



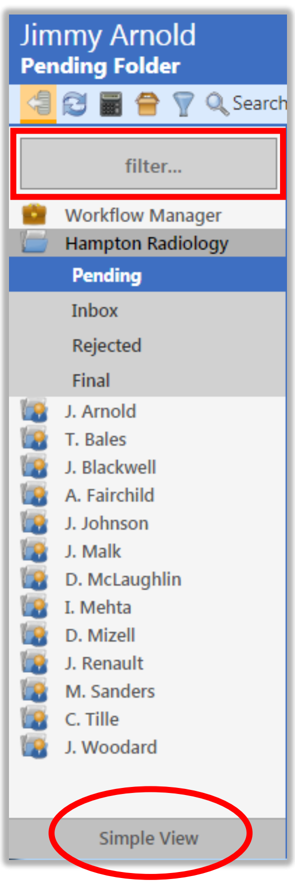
The Pending folder within the “Healthcare Provider Folders” for Healthcare Provider J. Arnold is selected.

Folder View Options

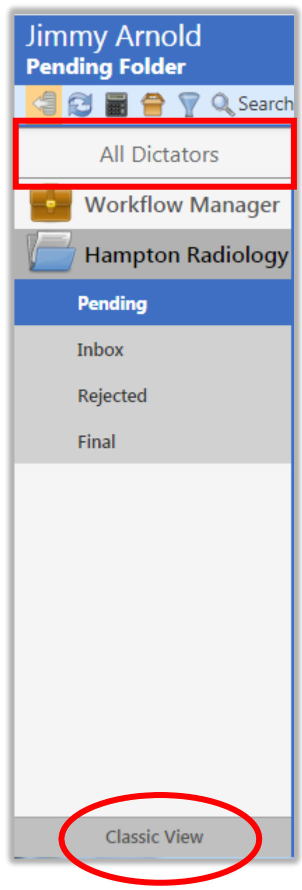
The Folder Pane can present folders in two different views. At the bottom of the Folders Pane a toggle button changes the which switches the view between “Classic View” and “Simple View.

The “Simple View” hides all Healthcare Provider names and presents a simpler view of the folders while collapsing all Healthcare Providers into a dropdown called “All Dictators” above the folders.

The “Classic View” displays a list of all Healthcare Provider names below the All Documents folder by default. Also, the Classic View presents a filter box at the top of the folders, allowing the user to quickly search for a specific Healthcare Provider by typing their name in it.



Currently in Classic View. Click the “Simple View” button to move to Simple View.



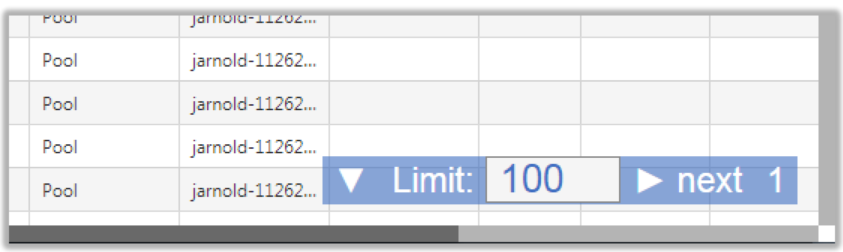
Currently in Simple View. Click the “Classic View” button to move to Classic View.

File Display

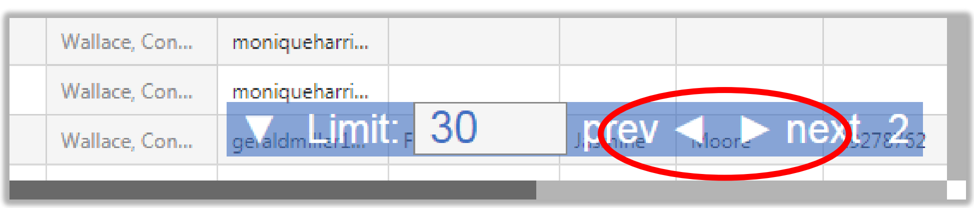
To the right of the Folder Pane is the space for File Display. This display contains a series of rows, each of which represents a dictation, or audio file (if in the Pending folder) or a document if in any other folder. The exception to this rule is the File Display within the Workflow Manager (see page 22), which displays both dictations and transcriptions. The folders visible and their content depend on the User role and their permissions.

Row and Page Setting

In the bottom right-hand corner of the file display is the row and page setting. The number of rows that are displayed, each row containing a file, can be adjusted in the page numbering block at the bottom right. The default setting of 100 rows per page can be customized by clicking the box containing "100" and changing the setting using the up and down arrows within the setting box.



The current page is changed by clicking the right-facing "next" or left-facing "prev" arrows.

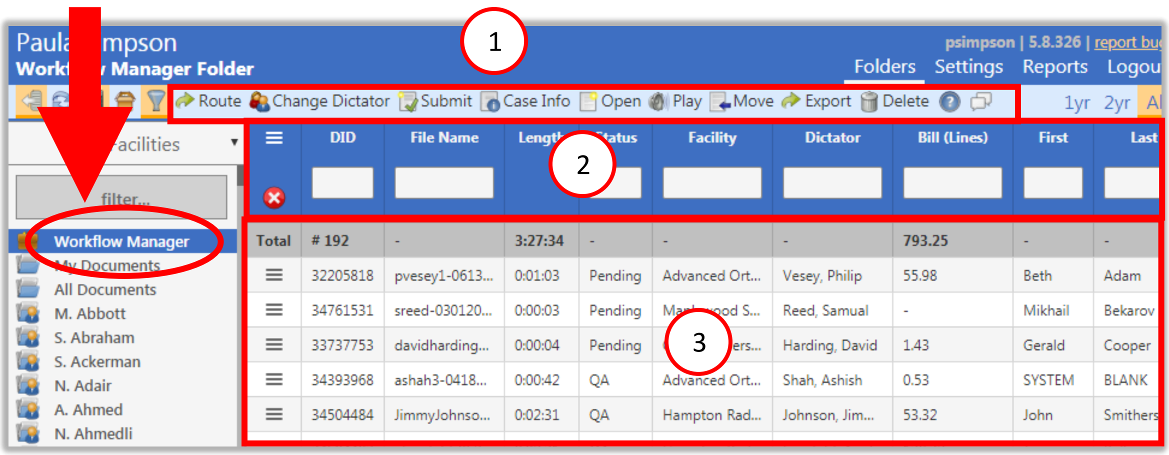


The downward facing arrow to the left of "Limit" minimizes the row and page setting box to a smaller view (see below). Clicking the up-facing arrow while in minimized view restores the default size.

Note: The functions available in the Folder Management Tools and contents of the File Display section depend on the Folder in use.

Workflow Manager

The first folder displayed in the top-left corner of the folder pane is the Workflow Manager (see below). The Workflow Manager is a powerful tool that provides quick and easy access to all dictations and transcriptions available in the system. The Workflow Manager utilizes a host of functions to provide the user with the ability to view all dictations in the workflow and to dig into their details simultaneously. This is achieved by combining several functions such as Filter, Show Totals, Export, Move and Submit, each of which is explained in upcoming pages.



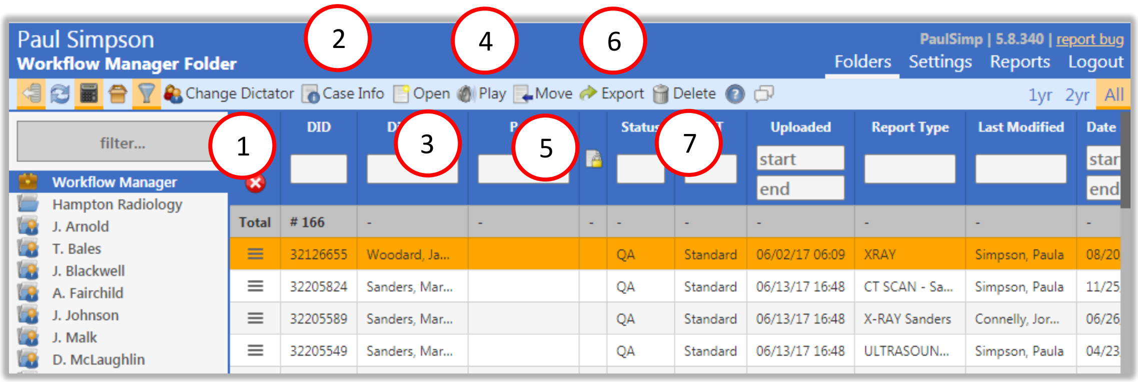
The Workflow Manager consists of three important areas:

1 **Folder Management Functions**: This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Workflow Manager folder.

2 **Columns**: Workflow Manager has several important and unique columns that are not visible anywhere else.

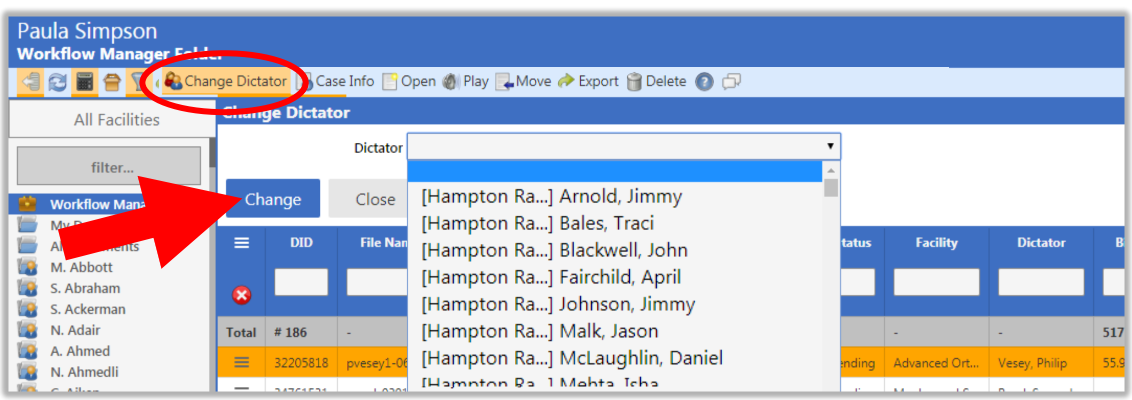
3 **File Display**: The central section of the Portal displays the files for dictations and transcriptions.

Folder Management Functions



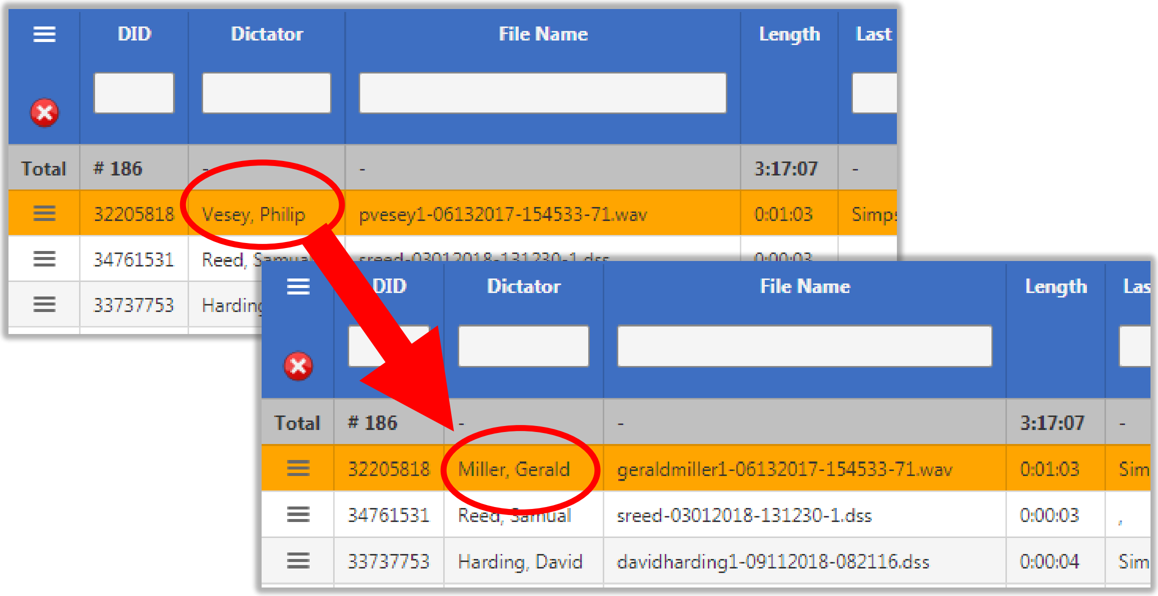
The first five icons from the left are consistent in all folders and more information on them can be found on page 14. The next seven icons are explained in detail below:

1 Change Dictator

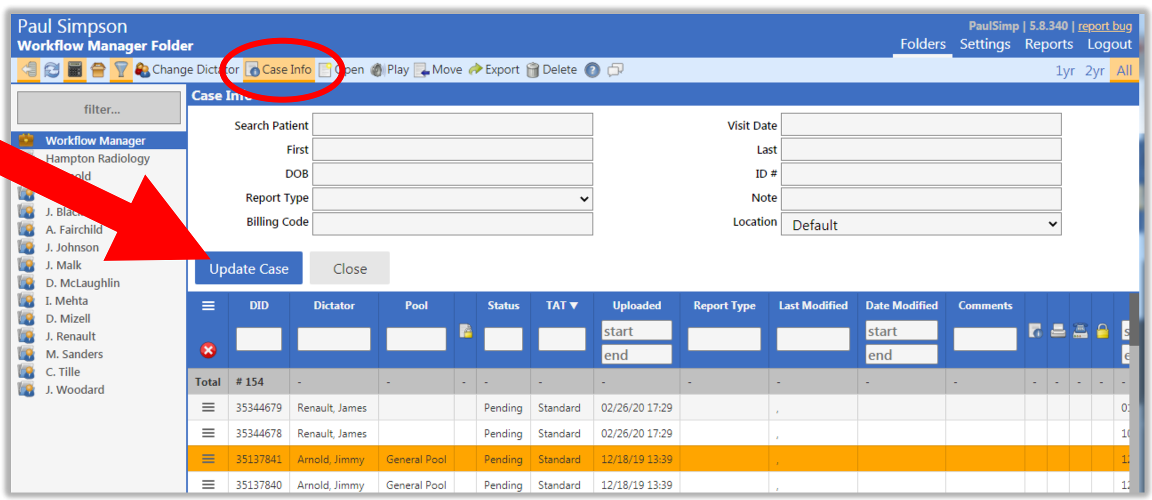


The “Change Dictator” function is used when Files need to be moved from one Healthcare Provider’s folders to another Healthcare Provider. The user selects a dictation and then clicks the “Change Dictator” button in the toolbar and selects the recipient Healthcare Provider from the Dictator dropdown.

Using the “Change Dictator” feature changes the Healthcare Provider identification attached to a dictation or transcription. When the Healthcare Provider is changed, the filename is updated to reflect the new Healthcare Provider. The “Dictator” column (and “Facility” column if applicable) is/are also updated.



2 Case Info



The Case Info function allows the user to add or change demographics associated with a dictation (via the Pending folder) or transcription (via all other folders). After selecting the desired row on screen and clicking the Case Info button, a panel will appear displaying fields that can be edited.

After edits, the user has two options for accepting changes: “Update Case” will only update the demographics within the portal view and the data base, but not update the document itself.

"Update Case and Document" will update the demographics within the portal, the data base, and the document itself. Clicking Close will discard the changes and close the Case Info panel.

Fields requiring explanation:

- The "Search Patient" field enables search on previously transcribed patients. Entering in a first name, last name, Patient ID, or a partial of any of those three options will cause a list to appear of all entries in the data base matching the search criteria.

- The "ID" field represents the MRN (Medical Record Number) of the patient.

- The "Report Type" field gives a list of all Report Types (sometimes called Work Types or Templates) associated with the Healthcare Provider / author.

- The "Note" field is a free text field. This field is used by the Transcription Team to send messages regarding the transcription back to the Facility.

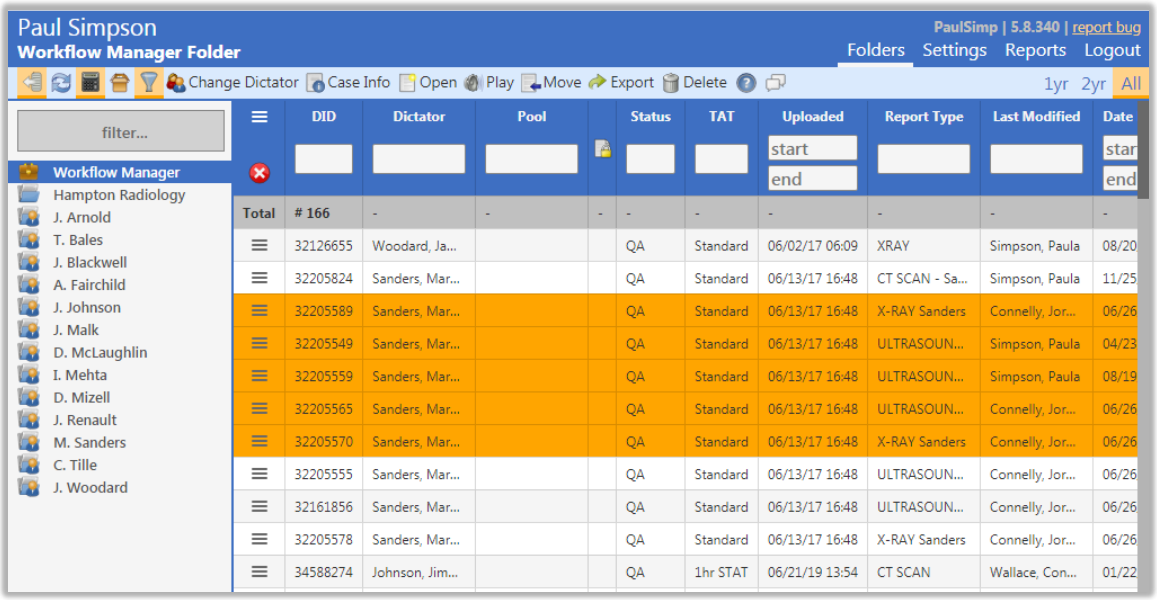
3 Open

"Open" is a permission-based function which enables users to open transcriptions using the Microsoft Word software installed on the local computer. Microsoft Word is accessed by WebChartMD's DocHandler (see page 9 for more information on the DocHandler). If the DocHandler is not installed (or if the user does not have edit permission), transcriptions will open in a non-editable PDF format.

Documents can be opened individually or in batches.

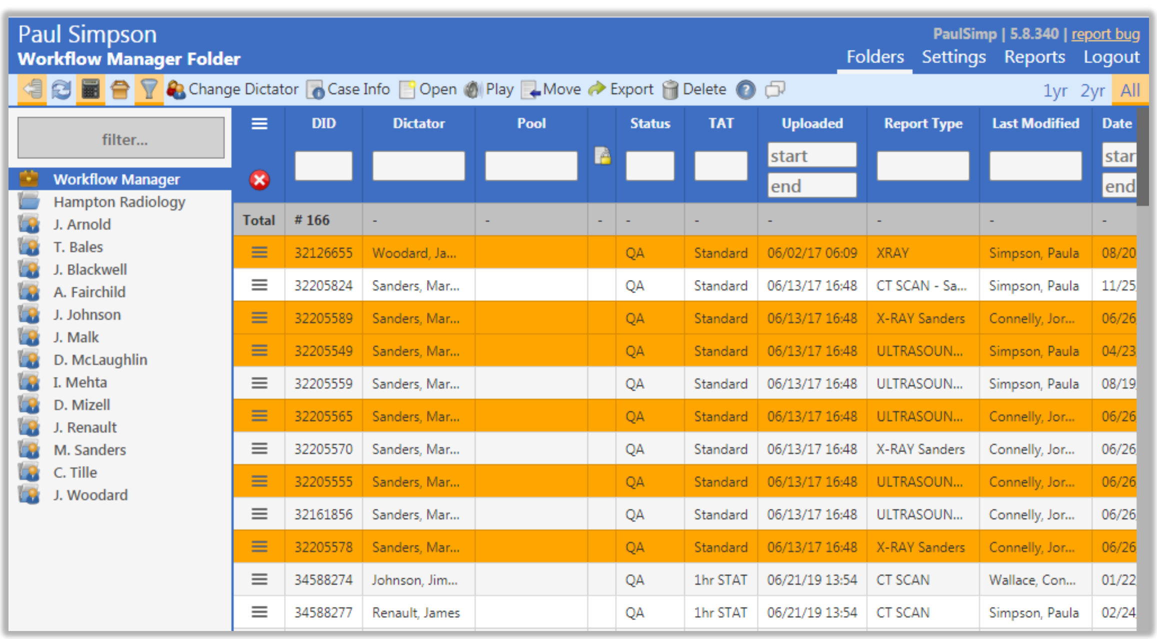
Opening a document individually: To open a document, highlight a row and either double-click the row, or press the "Open" button in the toolbar. This process is compatible with Internet Explorer, Microsoft Edge, Google Chrome and Mozilla Firefox.

Opening multiple transcriptions simultaneously: This feature is available only in Internet Explorer 10 and 11 and uses Active X settings. (see installation instructions for Active X settings needed). To open multiple transcriptions simultaneously, use the Shift key to select a batch of transcriptions, or the Control key to highlight and open non-adjacent selected transcriptions (see images below):



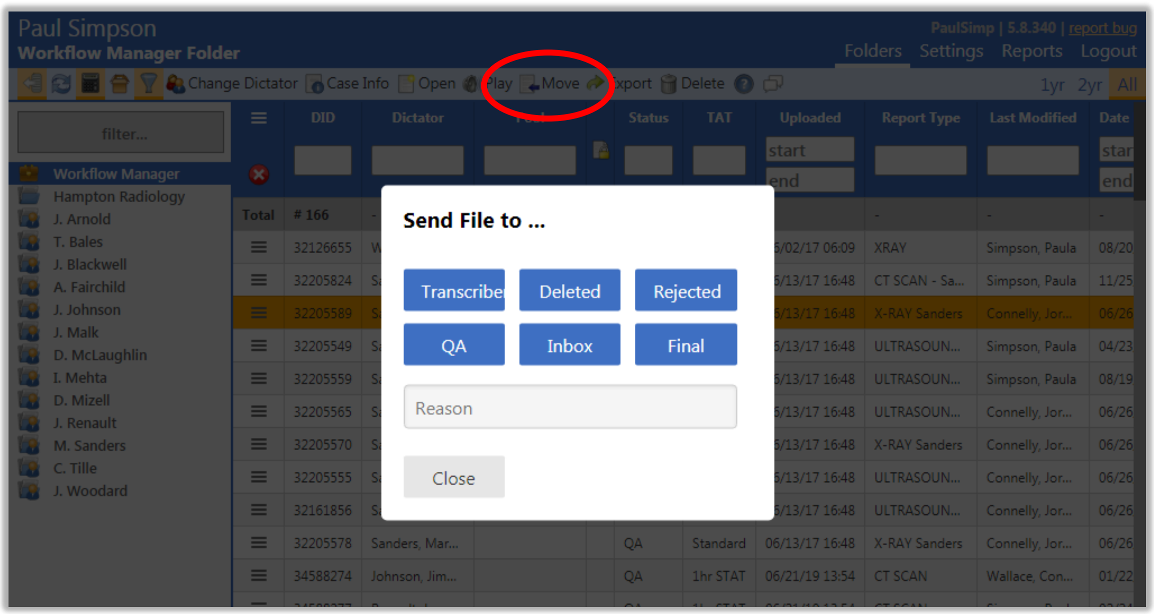
Example above of highlighting a group of transcriptions using the Shift key.

To open multiple specific transcriptions, hold down the Control key and click on selected rows (below). Click the "Open" button in the toolbar.



4 Play: This function loads the audio file of the dictation into the default player of the computer. More information about Express Scribe software can be found on page 113.

5 Move



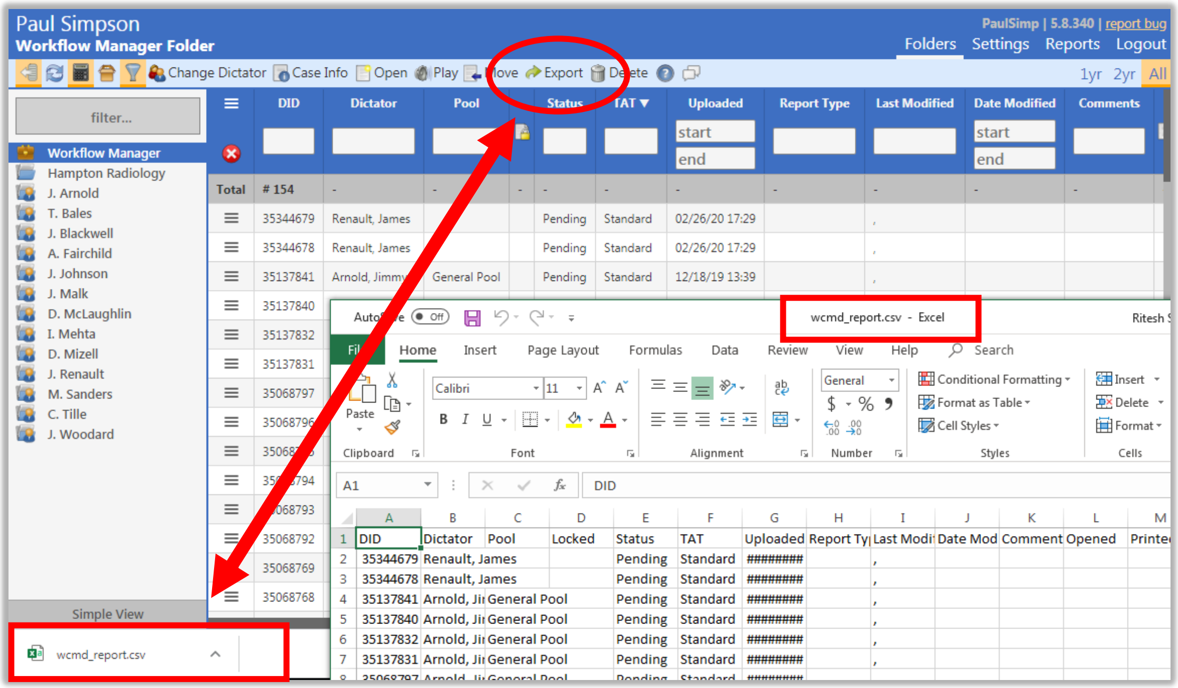
The “Move” function is only available in the Workflow Manager. This function allows the user to move a dictation or transcription into a different stage of the workflow. “Move” options available are:

- The “Transcriber” option moves the file back to the pending folder and routes it to the original transcriber.
- The “Deleted” option removes the file from the Portal’ view.
- The “Rejected” option moves the file to the rejected folder of the Healthcare Provider.
- The “QA” option moves the file to the QA folder of the Transcription Team.
- The “Inbox” option moves the file to the Healthcare Provider’ Inbox folder.
- The “Final” option moves the file to the Healthcare Provider’ Final folder.

See page 14 for detailed descriptions of folders.

Note: Since use of the “Move” feature represents a change in the normal workflow, the feature includes a “Reason” text box, which is captured in the audit trail.

6 Export

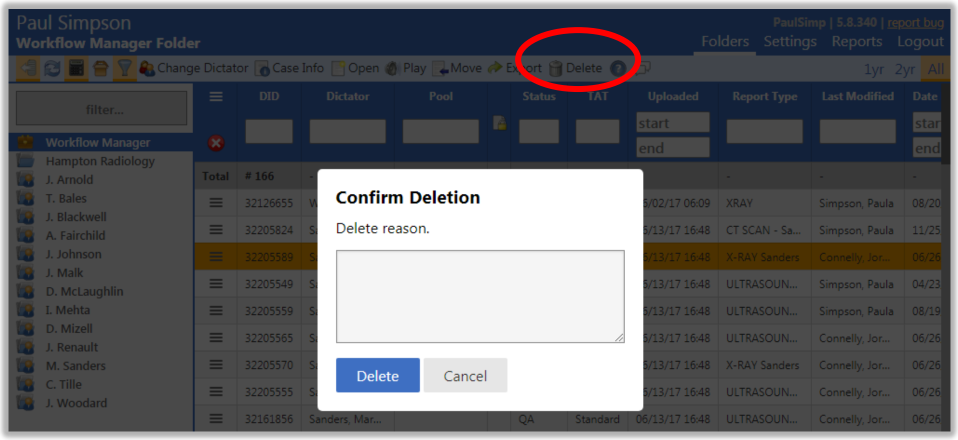


The “Export” feature is available only within the Workflow Manager. This feature downloads the content of the page into a csv file.

7 Delete

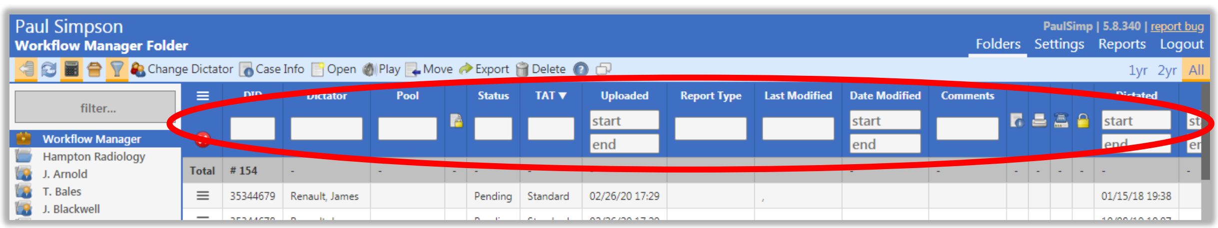
This function allows the user to delete a dictation or transcription. “Delete” is a permission-based feature (see Settings section, page 95).

To delete, select the dictation(s) or transcription(s), and click the Delete button in the toolbar. A popup menu appears asking the user to confirm their deletion request along with a reason, which serves to help prevent accidental deletions.



Columns

The Workflow Manager has a wide array of data columns available for display. Columns and their meaning are given below:



Here are the column descriptions in details:

Billing Code: This is a free text field that can be used by the Facility to add any notes or codes related to how the transcription will be coded and billed.

Column Selector: this is always the very first column and is used to show or hide the columns. More details on this are available in the next section called Column Management.

Date Modified: The date and time when the transcription was last edited.

Dictated Date: This is the date and time of dictation. On phone dictations, the date and time is when the Healthcare Provider is authenticated via their user ID. On the dictations done using handheld recorders, the dictation date and time is captured from the digital recorder's settings. If the date and time on the recorder is incorrect, then the dictated date and time will also be incorrect in WebChartMD Portal.

Dictator: The Healthcare Provider is the dictating user or owner of the transcription.

DID: This is a unique 8-digit number assigned to every dictation in the system and is used for tracking and File identification purposes. WebChartMD asks that users refer to Files in helpdesk interactions via the DID for HIPAA purposes. In cases where multiple patients are dictated on the same audio file, copies made of the audio file will each receive a unique DID.

DOV: The DOV stands for Date of Visit, the date the patient visited the Healthcare Provider.

DOB: The DOB stands for Date of Birth, the birth date of the patient that the Healthcare Provider is dictating on.

Encounter: This column displays the encounter type if it exists within an ADT feed from an EMR system.

eSigned: This column displays if the transcription has been electronically signed by the Healthcare Provider.

eSigned Date: This column displays the date and time of the electronic signature by the Healthcare Provider.

Faxed: This column displays the time and date of faxing the transcription.

File Name: The "Filename" column displays a unique identifier used by WebChartMD to identify the dictation or transcription. It is limited to use in either the Pending folder or the Workflow Manager folder. Components of the filename are:

File Name
jarnold-12182019-123801.wav

"jarnold" – Healthcare Provider' username
"12182019" – date of dictation: 18th December 2019
"123801" – time of dictation in 24hr format: 12:38pm
"wav" – audio file format of .wav. WebChartMD supports .dss, .mp3, .wav, .wma audio file formats.

Finished: This column displays the date and time when the dictation was transcribed and uploaded.

First: This column displays the patient's first name.

ID#: This column displays the patient's ID, or medical record number. In the absence of an ID, WebChartMD assigns a placeholder ID for patient tracking purposes.

JobID: For dictations made via the phone system, this column displays the Job ID given to the Healthcare Provider.

Last Modified: This column displays the name of the user who had made the most recent edits to the document of the transcription.

Last: This column displays the last name of the patient.

Location: For facilities using multiple locations.

Locked: This column displays a small lock icon if the document is already opened by another user. See more information on the Lock feature in the Document Management section.

Note: This column displays the “Clinic Note” written by the Transcriptionist while initially transcribing the dictation from the transcription tool.

On Time: This column displays if the transcription was delivered to the Healthcare Provider’ Inbox on time or not. This only displays for delivered files, and the field remains blank for dictations or transcriptions still in the QA folder.

- If the file was not late, it displays “On Time – x days” in black, .x is the number of days left.
- If the file was late, it displays “Late – x days” in red, x is the number of days it was late by.

Opened: This column displays if the transcription has been opened at least once.

Printed: This column displays if the transcription has been printed at least once.

Report Details: This column displays the report type but can be edited from the case info window.

Report Type: This column displays the name assigned to the template in the Template Manager. The Transcription team can set these templates up for the Healthcare Provider s. Please speak with the Transcription Team with details for the template setup.

Status: This column displays the status of the file. See page 68 in the Document Management section for a full description of all Statuses.

TAT: this column displays the turn-around time assigned to a dictation. See page 68 for a full description of dictation Priority & TAT setup.

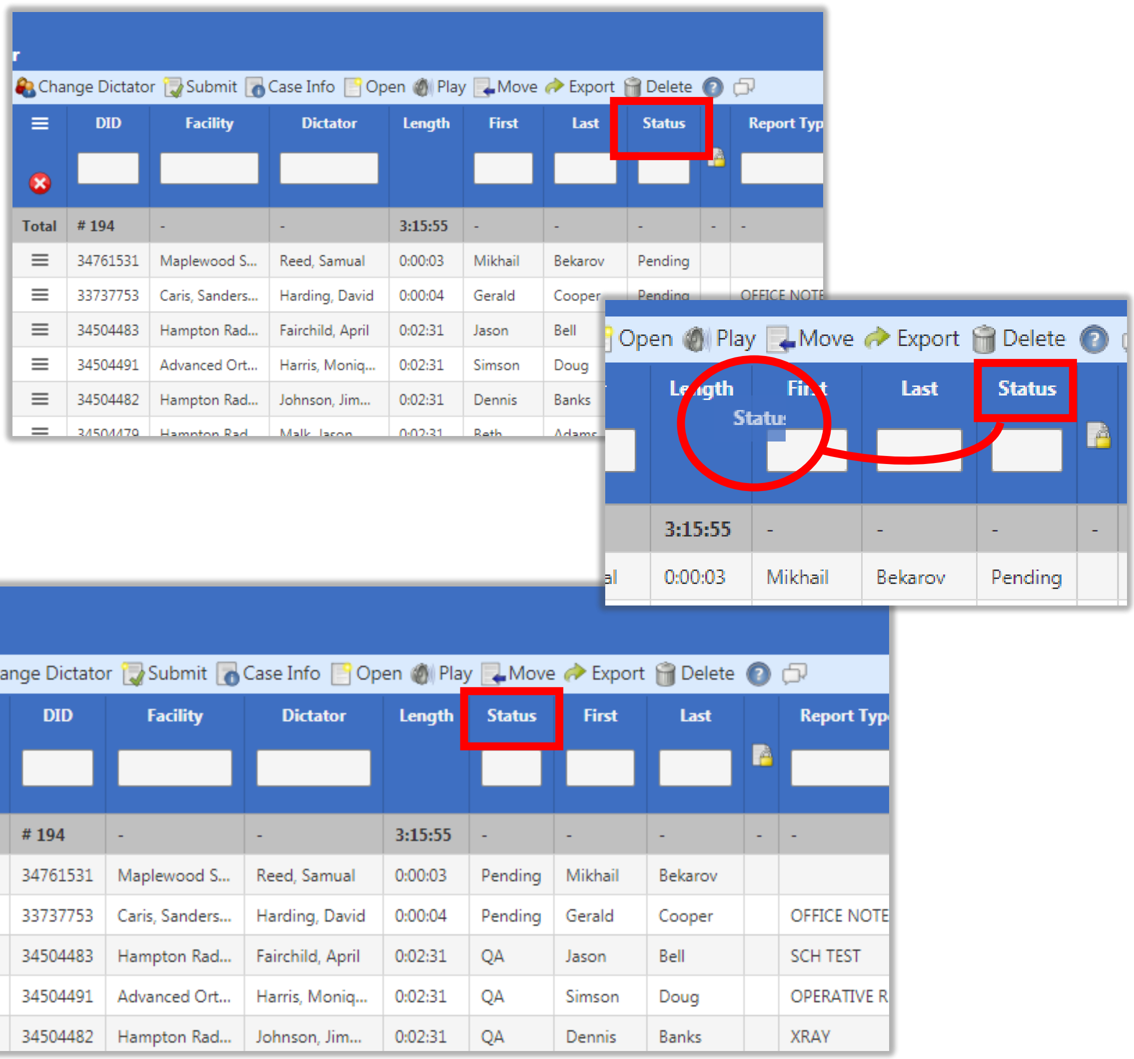
Upload Date and Time: this column displays the date and time when dictations upload into the database.

Column Management

Data columns in WebChartMD can be rearranged, hidden and sorted.

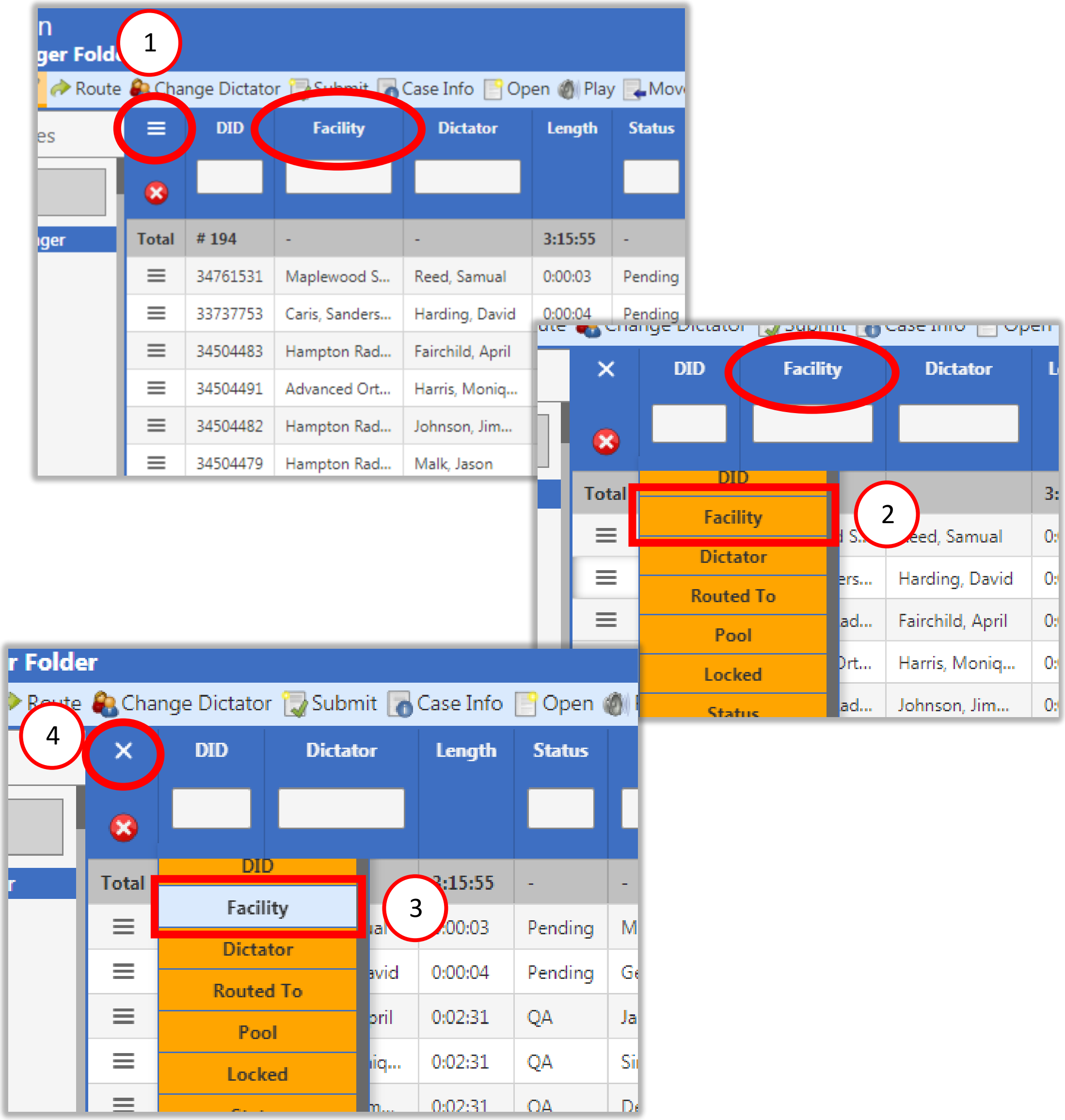
Rearranging

Columns can be dragged and dropped to a new location. To rearrange columns, hold down the left-click button on the mouse while simultaneously dragging the column to its new location.



Show/Hide

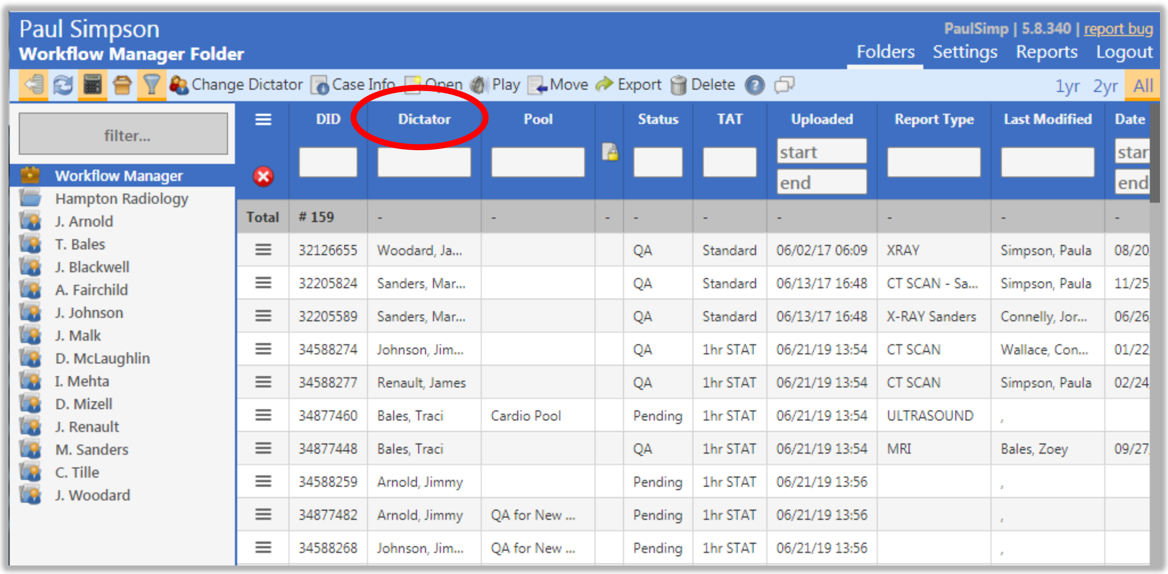
The Show/Hide menu is accessed via the three-line menu icon in the top-left corner of the File Display area (see 1 below). Currently visible columns are shown in orange, hidden columns in white (2 below). Click the column name to show or hide the column (3 below). Click the X when done to close the Show/Hide menu (4 below).



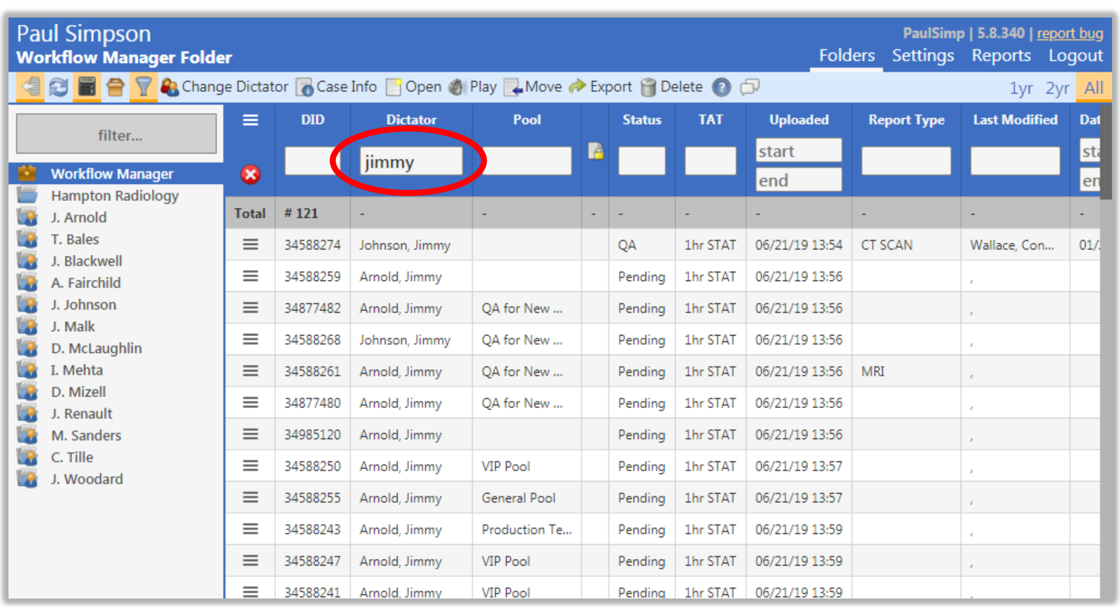
Quick Search

The information displayed in the File Display section, row by row, can be quick searched by using the fields under the column header names. To do this, the user can click inside the box and type in specific information and hits enter. This sorts the information available and displays files matching that criteria. Multiple search criteria can be combined and used to narrow the results. To do this, the user simply continues to enter more search criteria under other column headers before pressing enter.

Step 1: Identify which column will be used for searching. In this example, we will first search the Healthcare Provider name and then the status of the files.

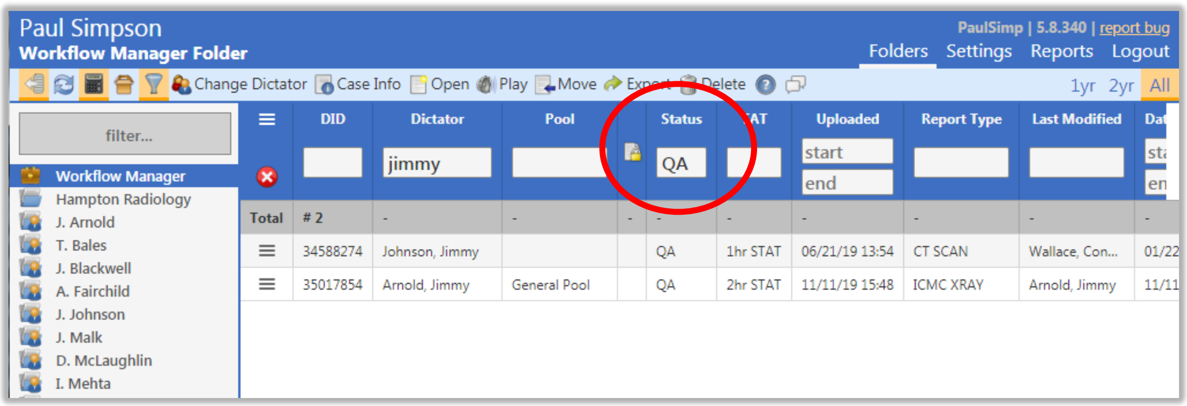


Step 2: Type the search content into the column header field.



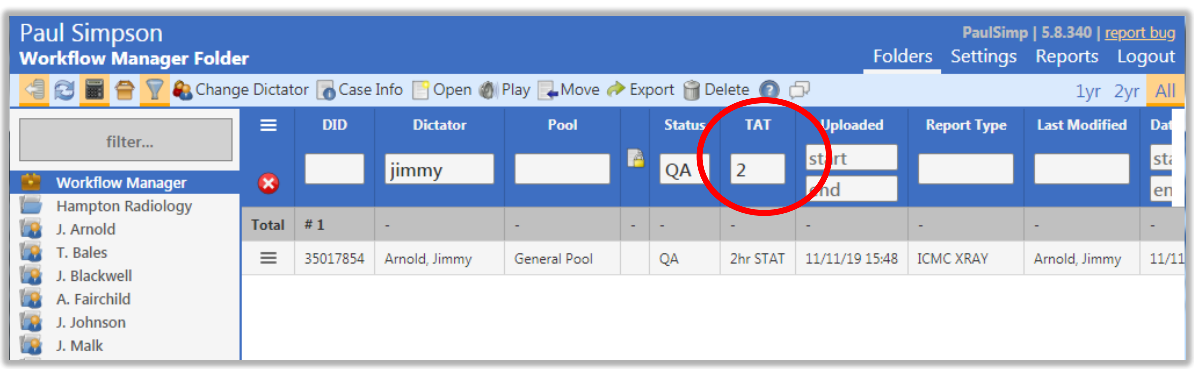
Results: In this example (above) typing the first word (Jimmy) of the Healthcare Provider's name filters all dictations and transcriptions down to those matching Healthcare Provider names matching that search criteria (Johnson and Arnold).

Step 3: A further level of search refinement is to filter only on dictations that are in a QA status. This is accomplished by adding all or part of the word "QA" in the Status column.



Results: This further eliminates all transcriptions from QA folder and only displays dictations in the Pending folder for Healthcare Providers Harris and Harding.

Step 4: The user further wants to look for dictations which would be in the QA folder & for Healthcare Providers containing "Jimmy" in their names & have a 2-hour STAT priority assigned. This is accomplished by typing "2" into the TAT column. This combines multiple search criteria and displays information that match all three requirements.



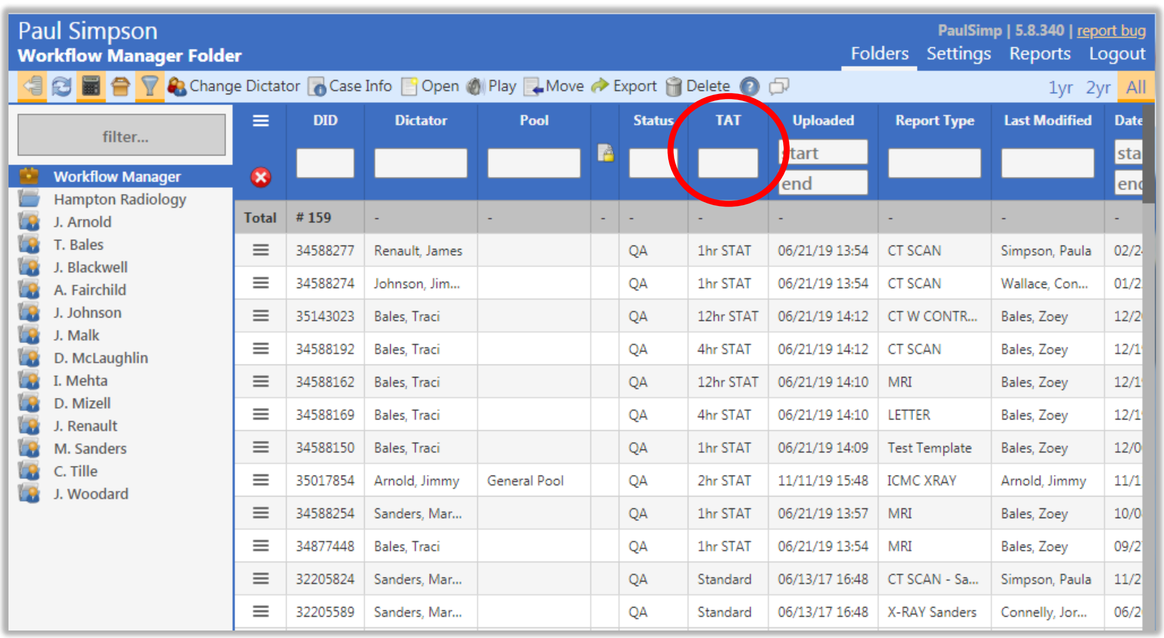
Results: This further sorts and displays only two files that belong to Healthcare Provider Harding and Harris that are in the Pending folder and have a 2-hour STAT priority on them.

Note: The "Enter" key is only needed to be pressed when search for a specific date range or for Status other than Pending and QA.

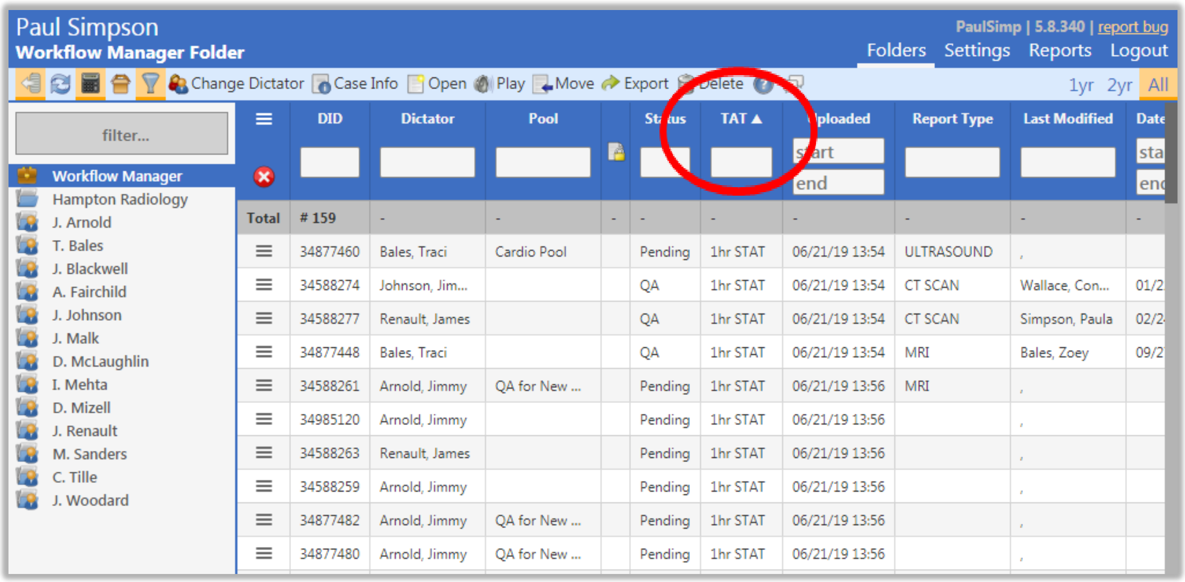
Sorting

Another feature that is available under Columns is the ability to sort the displayed information by a single column in an ascending (0 to 9, A to Z) or descending (9 to 0, Z to A) order. To do this, the user simply single clicks the name of the column header once. This adds a white triangle next to its name and sorts the column. The direction of the arrow further indicates if the information is sorted in ascending or descending order.

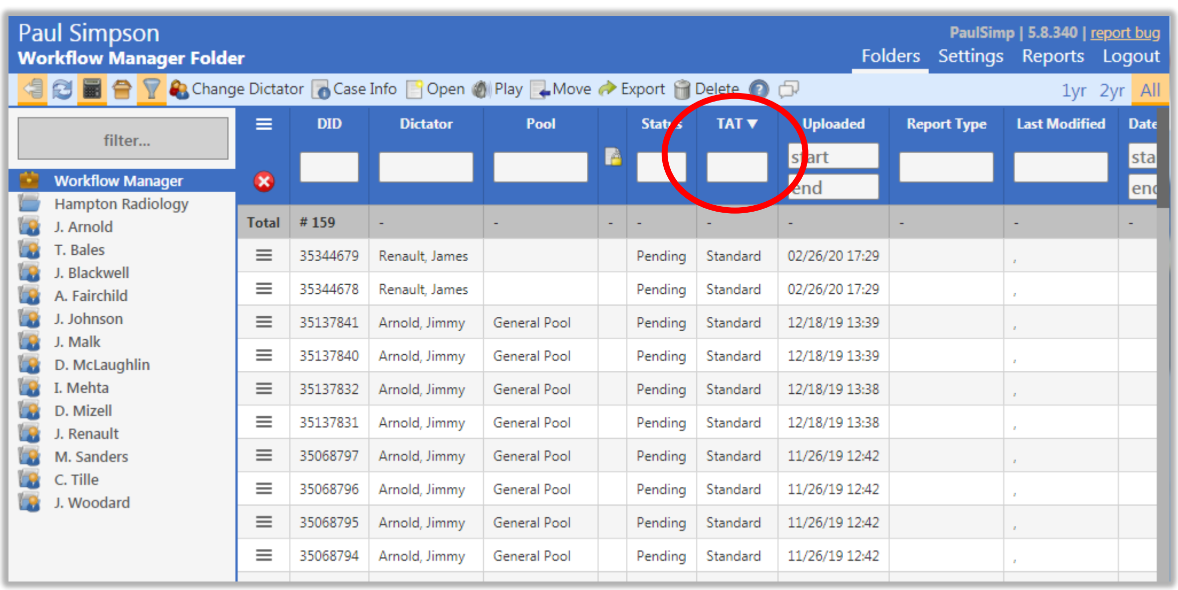
The unsorted TAT column header:



The TAT column header in ascending sort:



The TAT column header in descending sort:

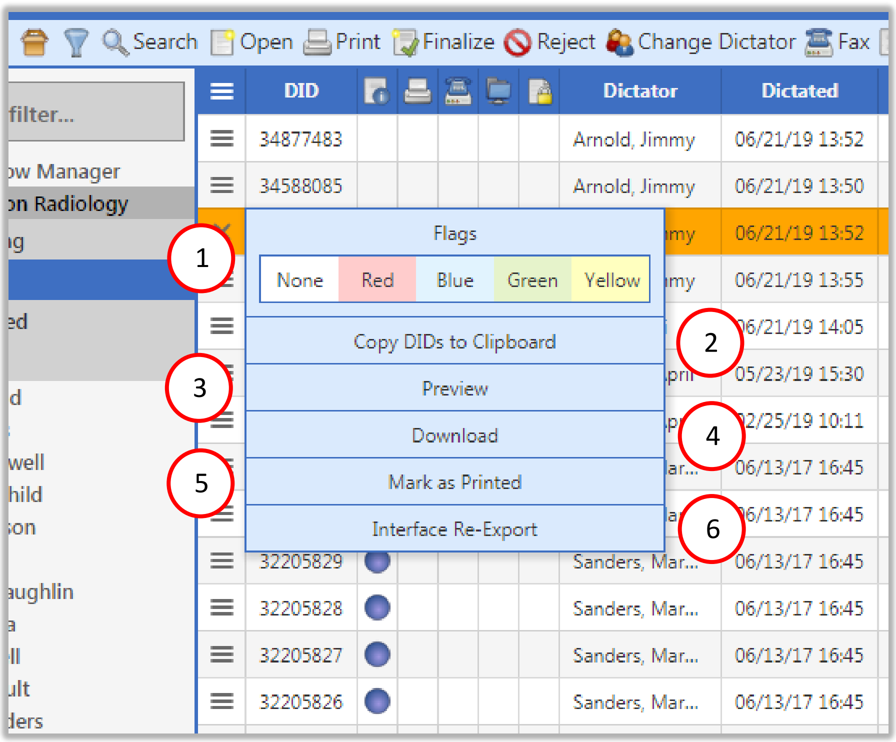


File Display

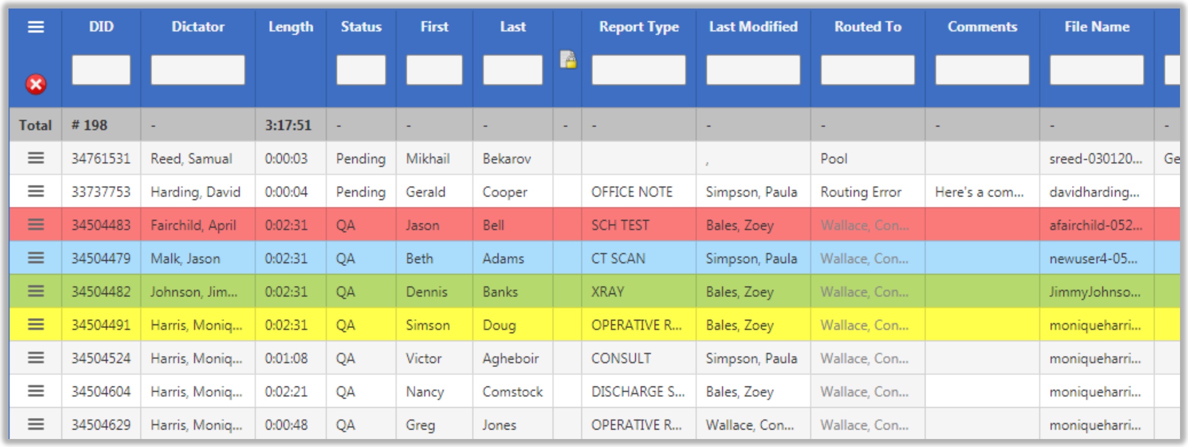
The Workflow Manager File Display area can display files in any phase of the workflow (Pending, Inbox, Rejected, Final, and Delivered (combines Inbox and Final). For a detailed description of available file statuses and their meaning, see page 68.

File Action Menu

The first column of each row contains a small icon of three black lines. This is called the File Action Menu. Clicking the icon opens the File Action Menu. Actions that can be taken on a dictation or transcription appear in the menu. If multiple rows are selected, intentionally or by mistake, the action will apply to all selected rows, even if the menu is opened on any one of the rows.

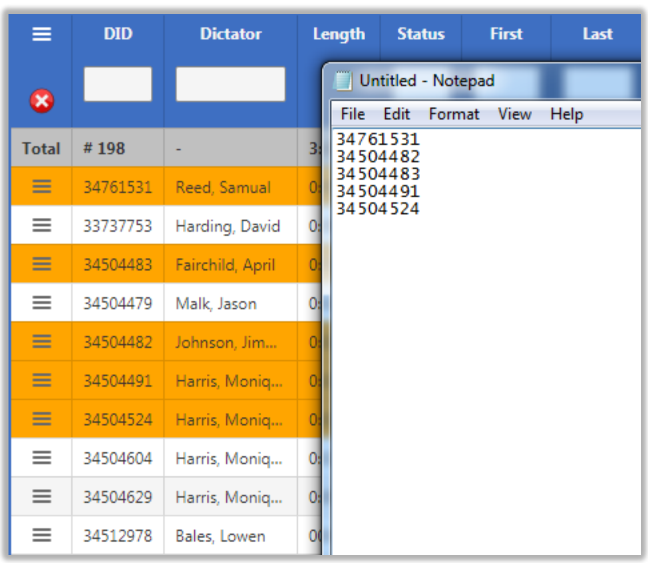


1 Flags: Rows in the “File Display” display in white by default. However, WebChartMD allows users to highlight rows in one of four colors for workflow reasons of the user’s design. To change the files from one color to another, select the dictation (or multiple dictations, using the control or shift key as needed) and click the File Action Menu icon. Select the desired color from the Flags options presented in the menu. Flag colors are displayed in the image below:

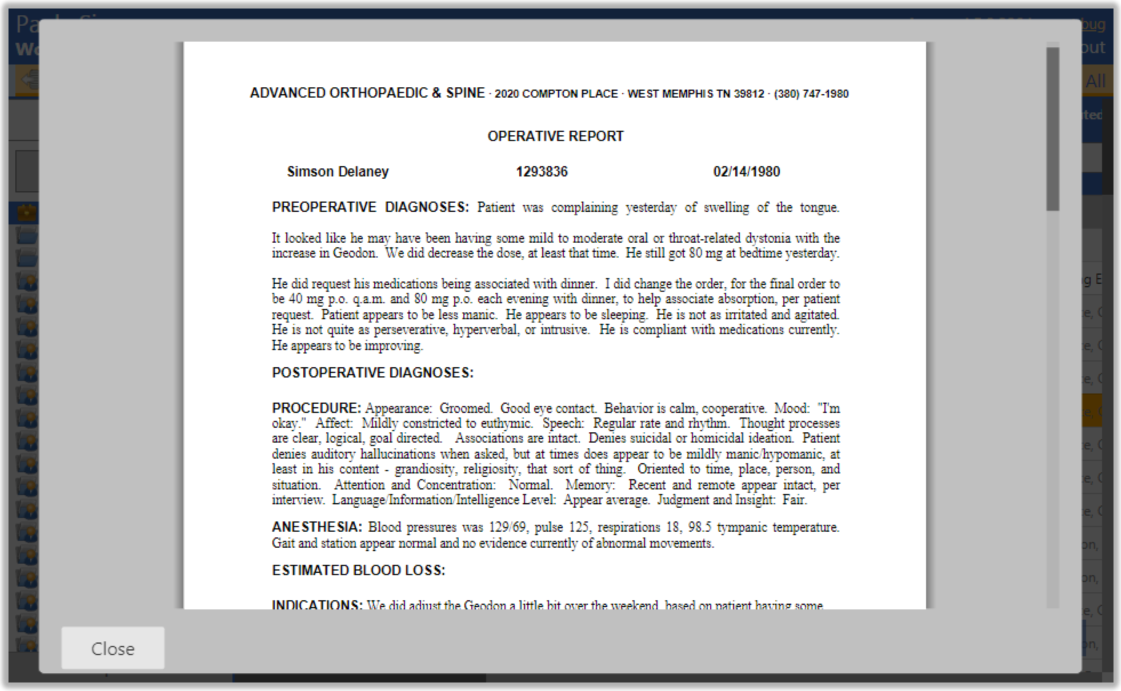


≡	DID	Dictator	Length	Status	First	Last		Report Type	Last Modified	Routed To	Comments	File Name	
Total	# 198	-	3:17:51	-	-	-	-	-	-	-	-	-	-
≡	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov			,	Pool		sreed-030120...	Ge
≡	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper		OFFICE NOTE	Simpson, Paula	Routing Error	Here's a com...	davidharding...	
≡	34504483	Fairchild, April	0:02:31	QA	Jason	Bell		SCH TEST	Bales, Zoey	Wallace, Con...		afairchild-052...	
≡	34504479	Malk, Jason	0:02:31	QA	Beth	Adams		CT SCAN	Simpson, Paula	Wallace, Con...		newuser4-05...	
≡	34504482	Johnson, Jim...	0:02:31	QA	Dennis	Banks		XRAY	Bales, Zoey	Wallace, Con...		JimmyJohnso...	
≡	34504491	Harris, Moniq...	0:02:31	QA	Simson	Doug		OPERATIVE R...	Bales, Zoey	Wallace, Con...		moniqueharri...	
≡	34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir		CONSULT	Simpson, Paula	Wallace, Con...		moniqueharri...	
≡	34504604	Harris, Moniq...	0:02:21	QA	Nancy	Comstock		DISCHARGE S...	Bales, Zoey	Wallace, Con...		moniqueharri...	
≡	34504629	Harris, Moniq...	0:00:48	QA	Greg	Jones		OPERATIVE R...	Wallace, Con...	Wallace, Con...		moniqueharri...	

2 Copy DIDs to Clipboard: This feature allows the user to quickly copy the DID numbers of the selected dictations into the clipboard for copy-paste to another application, such as Notepad. To use the feature, select a single or multiple rows and click "Copy DIDs to Clipboard". Transfer copied DID numbers using Paste (control-P).



3 Preview: This feature allows the user to do a quick preview of the document without opening it. Documents are previewed in a PDF format. The preview pane is closed by pressing the "Close" button in the bottom left corner of the preview window.



ADVANCED ORTHOPAEDIC & SPINE · 2020 COMPTON PLACE · WEST MEMPHIS TN 39812 · (380) 747-1980

OPERATIVE REPORT

Simson Delaney 1293836 02/14/1980

PREOPERATIVE DIAGNOSES: Patient was complaining yesterday of swelling of the tongue.

It looked like he may have been having some mild to moderate oral or throat-related dystonia with the increase in Geodon. We did decrease the dose, at least that time. He still got 80 mg at bedtime yesterday.

He did request his medications being associated with dinner. I did change the order, for the final order to be 40 mg p.o. q.a.m. and 80 mg p.o. each evening with dinner, to help associate absorption, per patient request. Patient appears to be less manic. He appears to be sleeping. He is not as irritated and agitated. He is not quite as perseverative, hyperverbal, or intrusive. He is compliant with medications currently. He appears to be improving.

POSTOPERATIVE DIAGNOSES:

PROCEDURE: Appearance: Groomed. Good eye contact. Behavior is calm, cooperative. Mood: "I'm okay." Affect: Mildly constricted to euthymic. Speech: Regular rate and rhythm. Thought processes are clear, logical, goal directed. Associations are intact. Denies suicidal or homicidal ideation. Patient denies auditory hallucinations when asked, but at times does appear to be mildly manic/hypomanic, at least in his content - grandiosity, religiosity, that sort of thing. Oriented to time, place, person, and situation. Attention and Concentration: Normal. Memory: Recent and remote appear intact, per interview. Language/Information/Intelligence Level: Appear average. Judgment and Insight: Fair.

ANESTHESIA: Blood pressures was 129/69, pulse 125, respirations 18, 98.5 tympanic temperature. Gait and station appear normal and no evidence currently of abnormal movements.

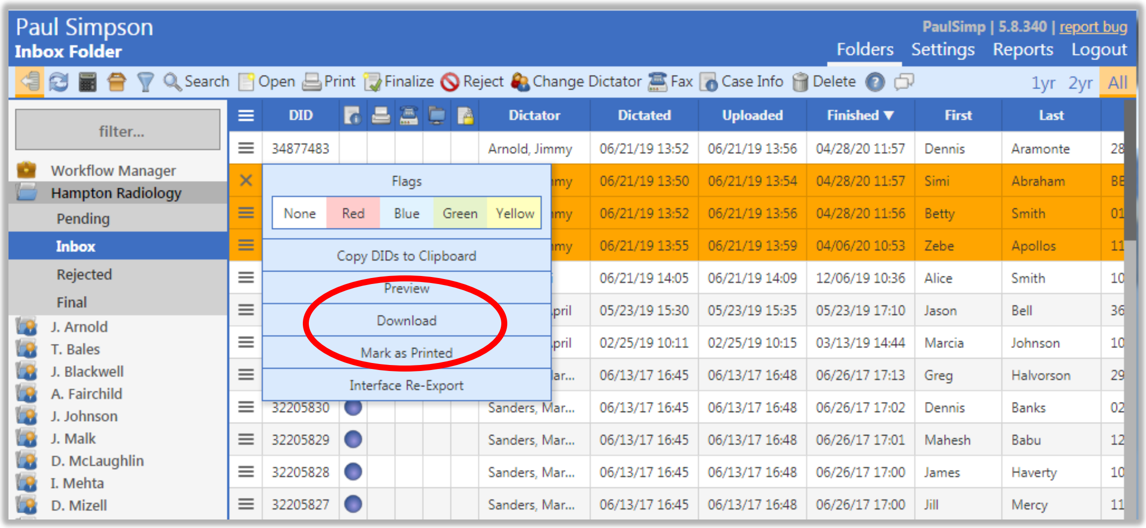
ESTIMATED BLOOD LOSS:

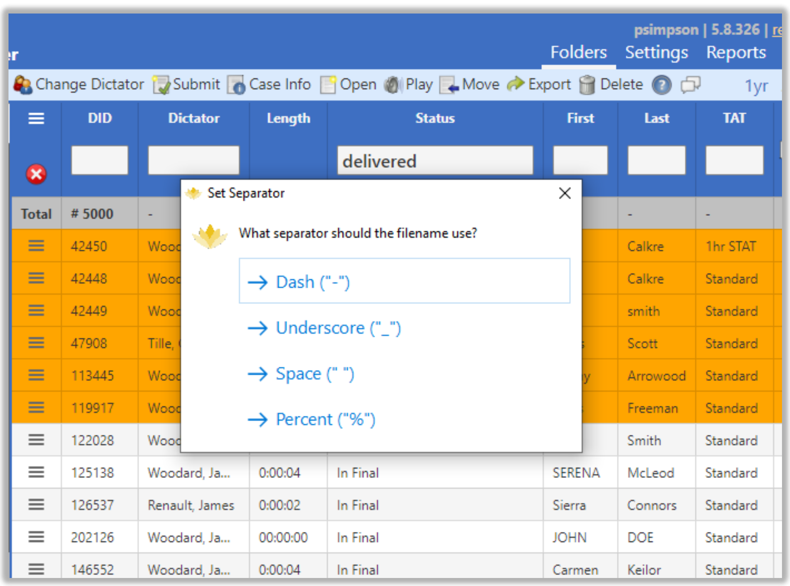
INDICATIONS: We did adjust the Geodon a little bit over the weekend, based on patient having some

4 Download: This feature allows the user to download the transcribed document(s) to their computer as a .doc file. To download, the user clicks on the “Download” option on the Row Action Menu.

Setup:
The downloading process can be setup with these easy steps:

<u>Step 1</u>: Select files(s) to download
The user selects a single or multiple files and then clicks on the “Download” option of the “File Action Menu”. This initiates the downloading process.





Step 2: Create the desired filename format
After pressing "Download" in the File Action Menu, the user is prompted to select the desired separator to be used in the filename. Four options are available:

- Dash ("-"): This creates the file name using the dash between words. Example: Andrew-Smith-Jessica-Johnson.doc

- Underscore ("_"): This creates the file name using the underscore between words.

Example: Andrew_Smith_Jessica_Johnson.doc

- Space (“ “): This creates the file name using the underscore between words. Example: Andrew Smith Jessica Johnson.doc

- Percent (“%”): This creates the file name using the underscore between words. Example: Andrew%Smith%Jessica%Johnson.doc

Step 3: Select the desired file name components.
After selecting the desired separator, a box appears presenting the list of twelve available data elements that can be included in the filename. Data elements will appear in the filename in the order they were selected. Available data elements are:

- DID: Inserts the DID number.
- Practice: Inserts the Facility name
- DOV (MMDDYYYY): Inserts the date of visit for the dictation without using separators.
- DOV (MM-DD-YYYY): Inserts the date of visit for the dictation with separators.
- Provider ID: Inserts the Healthcare Provider’ user ID.
- Provider First: Inserts the Healthcare Provider’ first name.
- Provider Last: Inserts the Healthcare Provider’ last name.
- Patient First: Inserts the patient’ first name.
- Patient Last: Inserts the patient’ last name.
- MRN: Inserts the patient’ medical record number (MRN).
- DOB (MMDDYYYY): Inserts the date of birth for the dictation without using separators.
- DOB (MM-DD-YYYY) Inserts the date of birth for the dictation with separators.
- Done

Examples of typical filenames are:

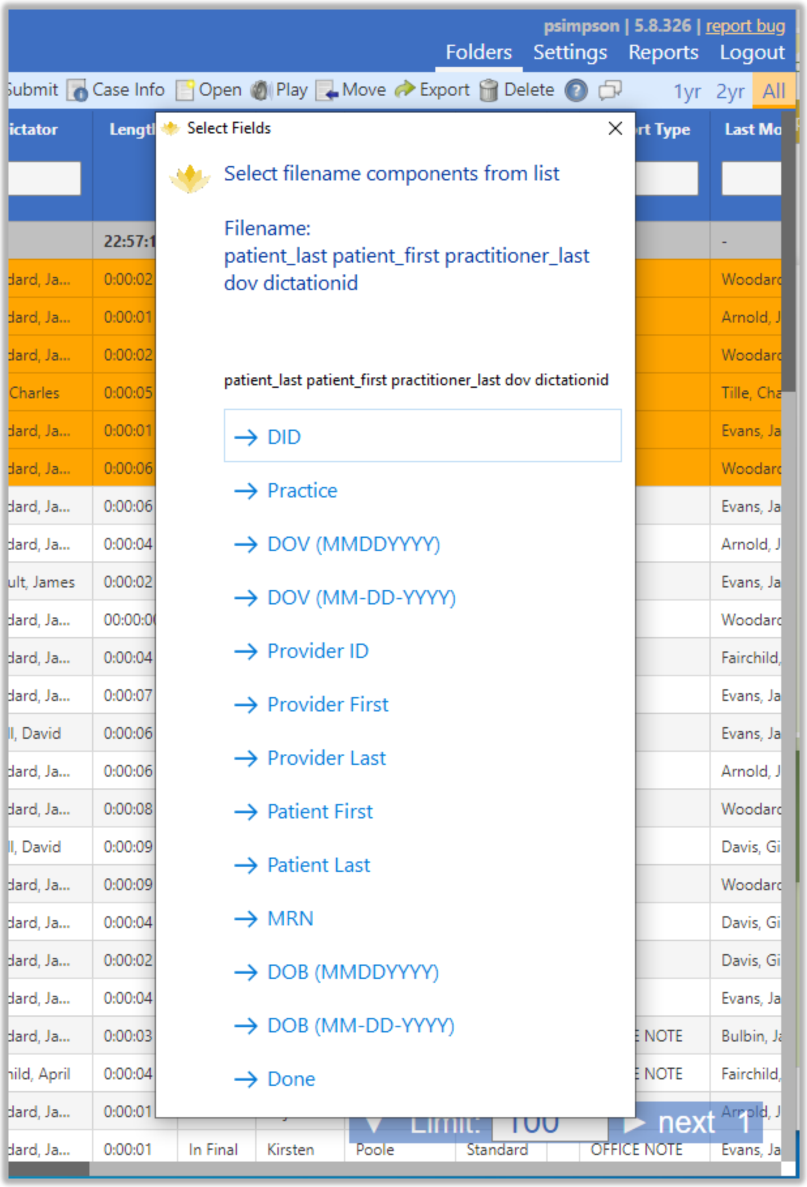
DID-Practice-MRN-Provider_Last, which would populate with data as:

32101595-Allentown Chiropractice-Johnson

or DOV (MMDDYYYY)_Provider_First_Patient_Last_Practice, which would display as:

02-20-2020_Jessica_Smith_Williams_Dallas-Surgery-Center

As data elements are selected, the setup windows adds the elements in real time to display what the filename. Once a data element is selected, it is not possible to unselect or remove it until the downloading options are reset (see further below).

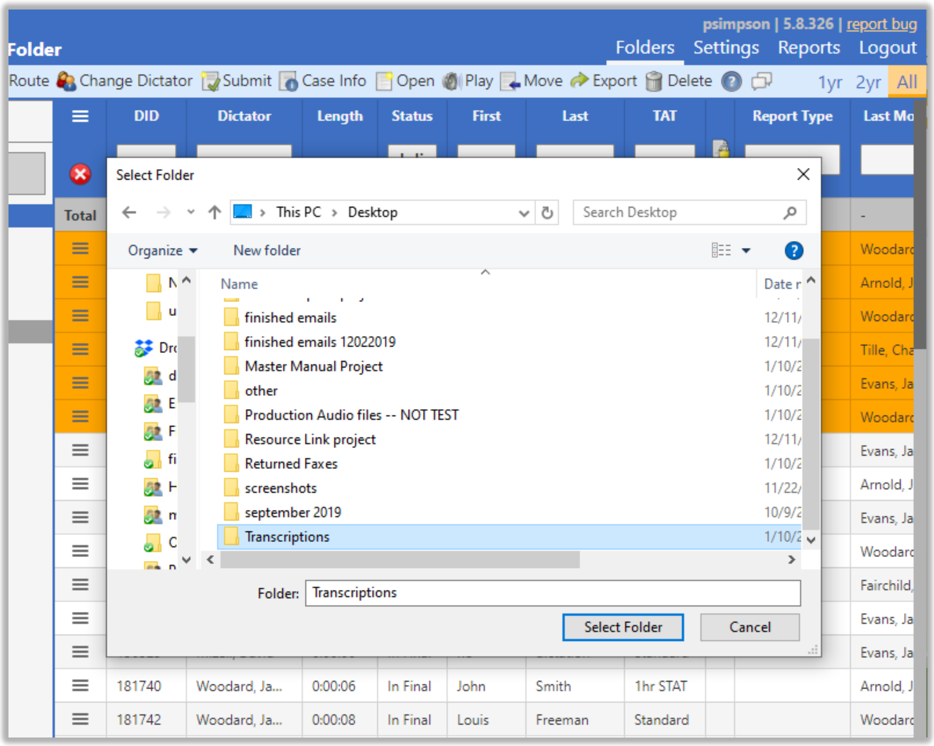


Step 4: Completing the filename
Once the required filename has been selected, click the “Done” option at the bottom of the list to finish the file name selecting process and proceed to the next step.

Note: It is highly recommended to have the filenames contain at least one unique file naming feature such as DID number in case the Healthcare Provider has two dictations on the same day for the same patient, in which case, both transcriptions would populate the same filename and can potentially overwrite each other in the process of downloading them.

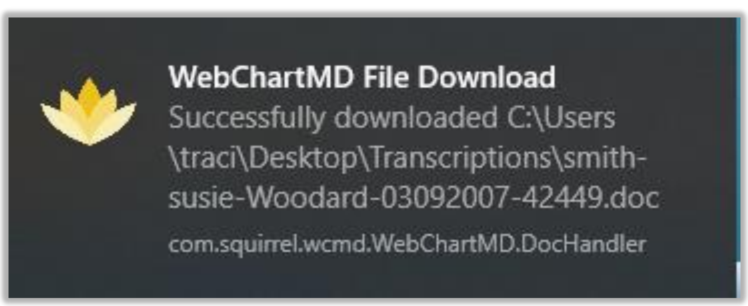
Step 5: Choose download location

Once the filename has been established, the set-up tool displays a folder selection window. Browse to the folder or location desired for documents to download and press “Select Folder”.

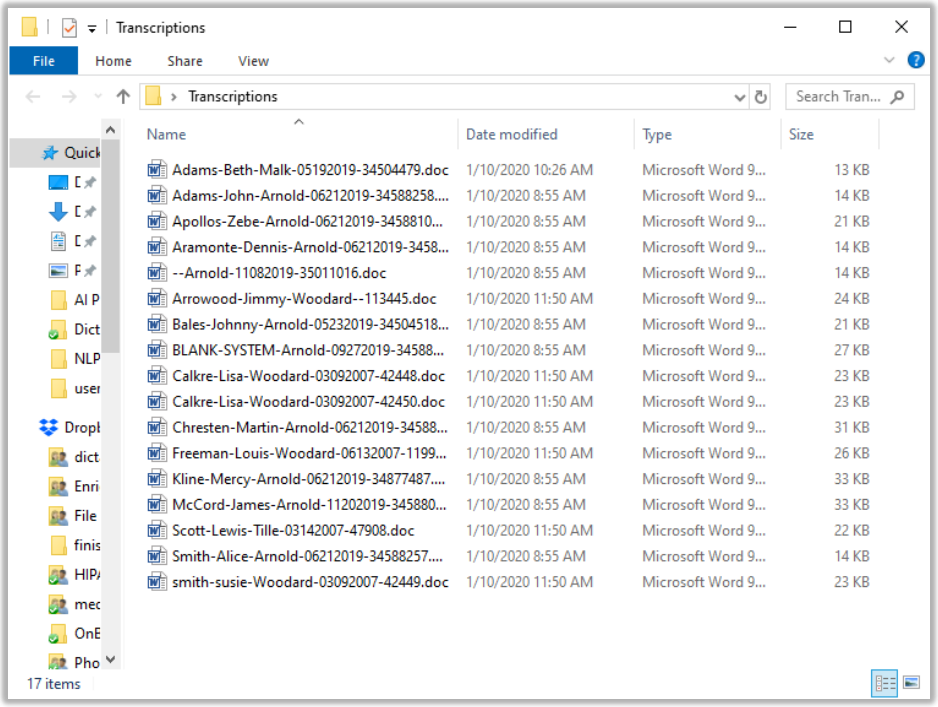


<u>Step 6</u>: Download completion

Once the download location is selected, files will automatically download into the selected folder. A popup message in the bottom right corner of the screen confirms files have successfully downloaded.



Download confirmation popup message

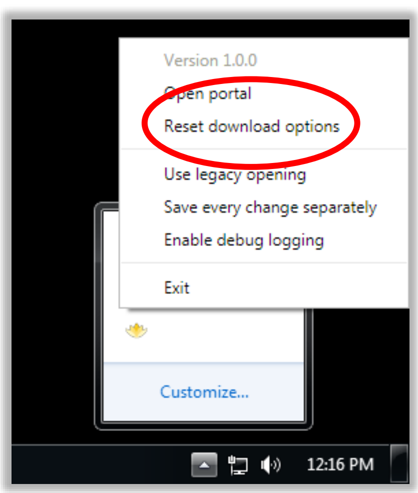


The transcribed documents downloaded to the selected location.

Notes:

1. After the initial set-up is done, the system remembers the configuration and uses it for any subsequent downloads.

2. The “Reset download options” in the Doc Handler allows the user to reset all downloading settings to create new download settings.

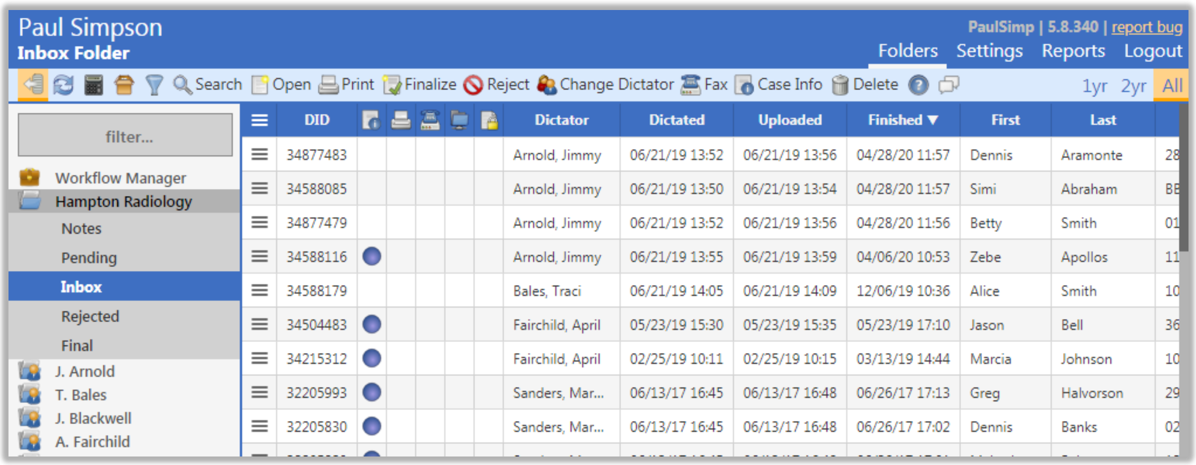


6 Mark as Printed: This marks the transcription as having been printed.

7 Interface Re-Export: This feature allows the user to retrigger a transcription so that it exports. For more details, please contact WebChartMD Support for details on setting up an Interface.

Facility Name

The folder is named with the Facility Name for the facility user logged into the Portal. It also serves as a secondary view into the workflow for many of the same functions performed within the Workflow Manager.   There are five folders under this view:



Notes: This displays the Notes created by the Healthcare Providers.

Pending: This displays the dictations that are yet to be transcribed.

Inbox: This displays the dictations that need to be transcribed.

Rejected: This displays transcriptions that have been moved to a Rejected status, either by the Healthcare Provider, or by a Transcription Team member.

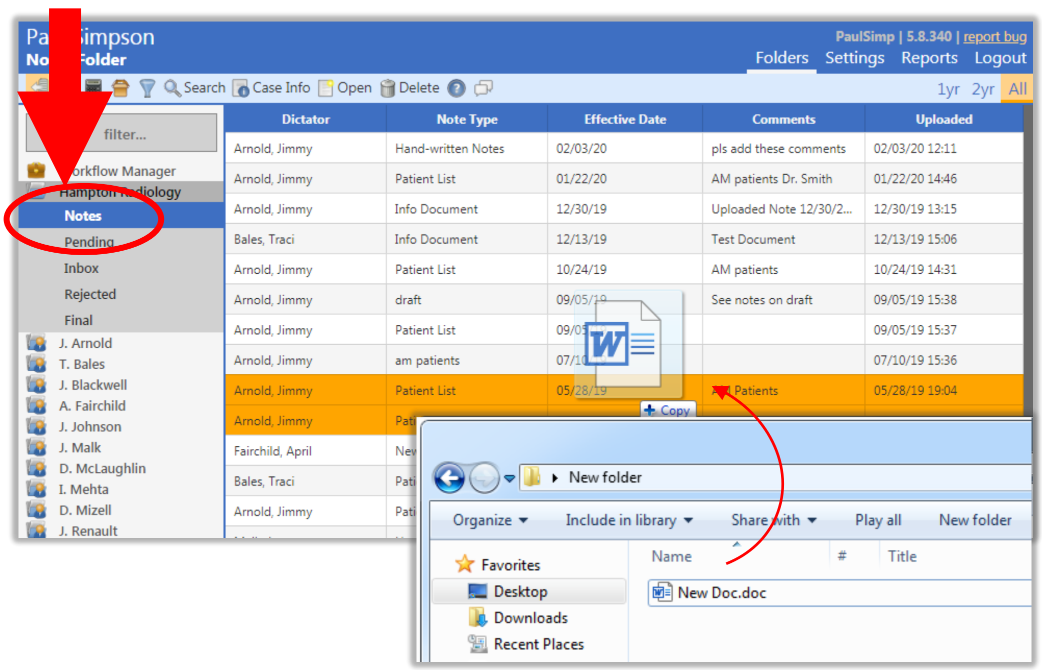
Final: This displays the dictations that have been finalized.

Notes

The Notes folder allows Facilities to add documents to the workflow through a drag and drop process. Typical documents that might be added to the workflow via the Notes folder include informational documents, patient lists/schedules, and hand-written notes that are outside the normal dictation/transcription workflow.

Adding Documents to Notes Folder

Facility users can upload a note by dragging and dropping it from the user's desktop or folder on computer and onto the the file onto the File Display area in the Notes view.



Once the document is dropped into the File Display area, a "Case info" box appears (below). Facility users can enter any pertinent information into the fields listed in the Case Info box:

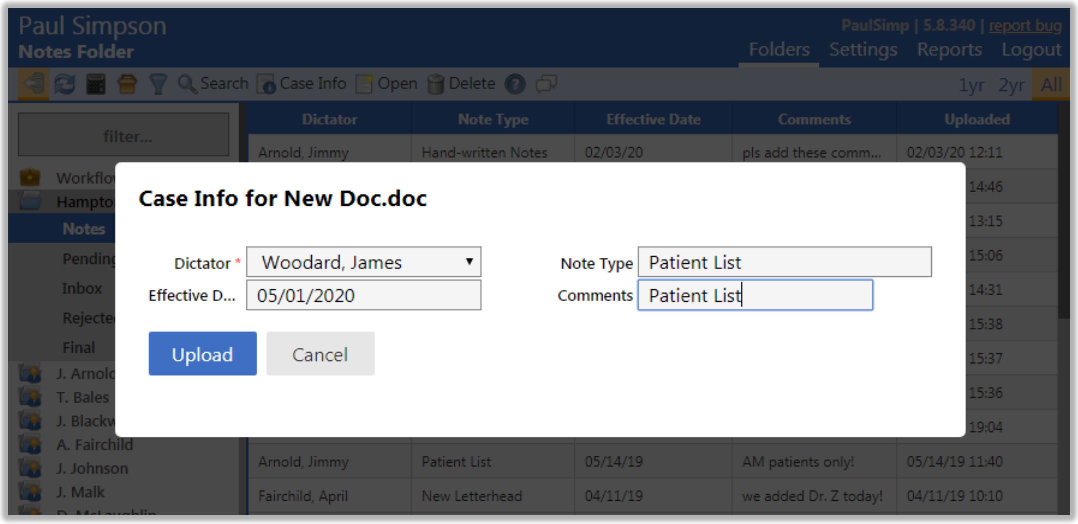
Facility: This provides with a dropdown menu allowing the user to select a Facility name.

Dictator: Once the Facility name has been selected in the above dropdown, this Dictator dropdown displays a list of Healthcare Providers at the Facility, allowing the user to select a Healthcare Provider for this note.

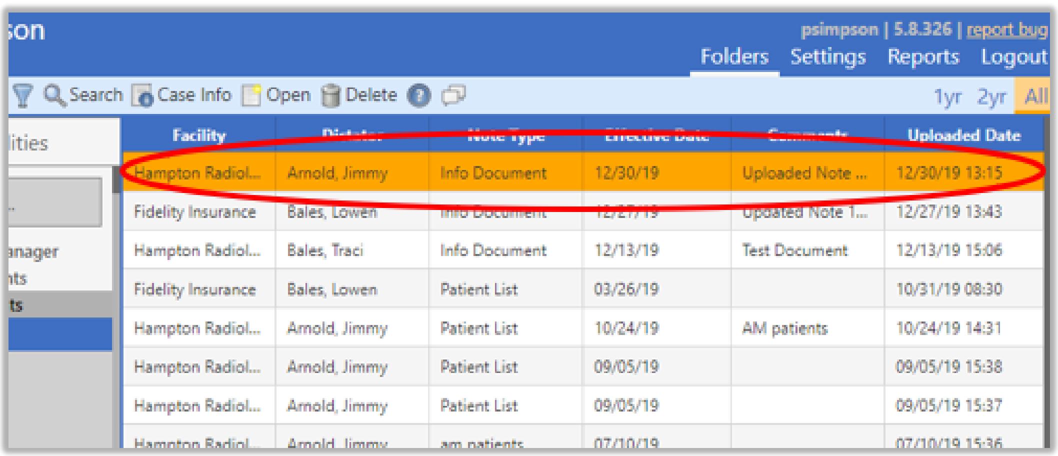
Note Type: The Note Type field is a free text that can be entered to describe the note type.

Comments: A free text box, allowing the user to write information about this Note document.

Effective Date: The time and date of uploading the Note.



Once the document is uploaded it will be visible in the main window of the Notes folder, from where the Transcription Team can access the document to take whatever action is required.



Folder Management Functions

All available Folder Management Functions viewable in the Notes folder and their descriptions can be found starting on page 14.

Columns

The column display within the Notes folder is intentionally different than other folders. This is because columns in the Notes folder display the data entered via the Case Info box at the time the document was added into the workflow. A full description of each data fields visible in the Notes folder are described on the previous page.

Column Management

Unlike other Folders, column management features are limited to column arranging, and column ascending/descending capabilities. See page 31 for a full description of column management features.

File Display

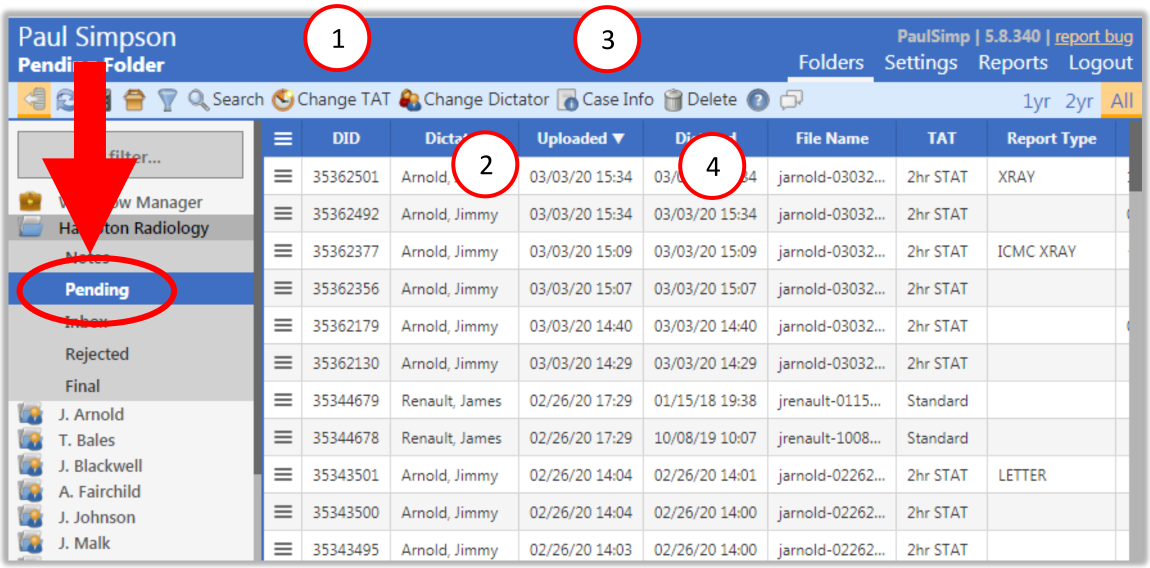
The files displayed in this section are not dictation files. All visible files in this folder are note documents. For a detailed description of available file statuses and their meaning, see page 38.

File Action Menu

All available "File Action Menu" options viewable in the All Documents Inbox and their descriptions can be found starting on page 37.

Pending

The Pending folder gives the user a view of all files that have not yet been delivered. In other words, it contains dictations waiting to be transcribed and transcriptions in the QA workflow of the Transcription Company, but no on-screen indication is given if a file is in a Pending status or a QA status.



Folder Management Functions

The first six functions from the left are consistent in all folders and more information on them can be found on page 14. The next four functions are explained in detail on page 68.

Columns

All available columns viewable in the Pending and their descriptions can be found starting on page 31.

Column Management

File Display

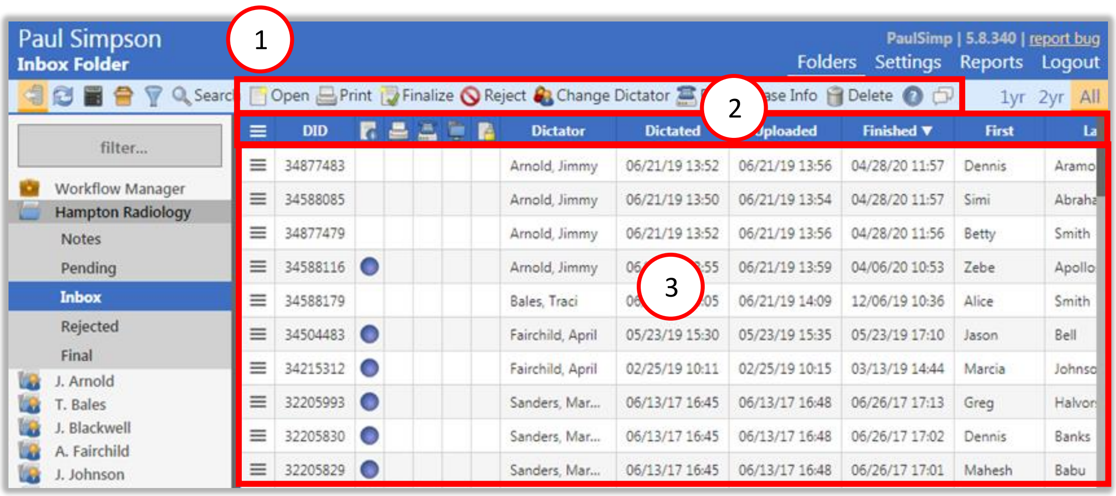
This section displays the dictations. All visible dictations in this folder are of the Pending status. For a detailed description of available file statuses and their meaning, see page 38.

File Action Menu

All available “File Action Menu” options viewable in the All Documents Pending and their descriptions can be found starting on page 37.

Inbox

The Inbox contains all dictations from all Healthcare Providers that have been transcribed by the Transcription Team.



The Inbox folder consists of three important areas:

1. **Folder Management Functions**: This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Inbox folder.

2. **Columns**: Inbox folder has several important columns available for the user and are explained in detail below.

3. **File Display**: The central section of the Portal displays the files for dictations.

Folder Management Functions

The first six functions from the left are consistent in all folders and more information on them can be found on page 14. The next eight functions are explained in detail below:

1. Open: More information on Open can be found on page 24.

2. Print: This allows the user to print transcriptions. The transcribed document prints to the default printer of the computer.

3. Finalize: This function finalizes the transcription and moves it to the Final folder. More information about the finalized status can be found on page 68.

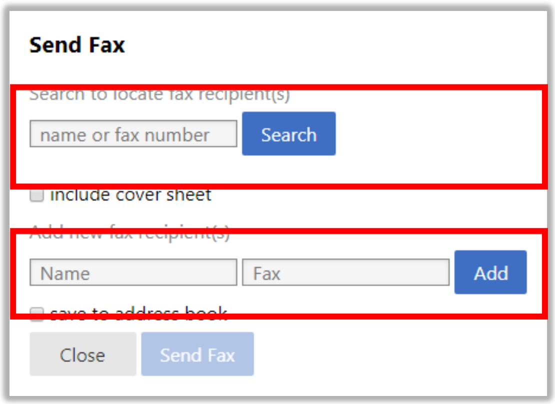
4. Reject: This allows the user to reject dictations in the transcription workflow; to access the Rejected folder within the Folders view; and to edit and re-submit documents that have been rejected and are within the Rejected folder. For more information about rejecting, please see page 60.

5. Change Dictator: More information on Change Dictator can be found on page 22.

6 Fax: Transcriptions can be faxed directly from the Portal, via either an automatic setting or manually. For more information on automatic faxing, please see page 65.

To manually fax transcription(s) from the portal:

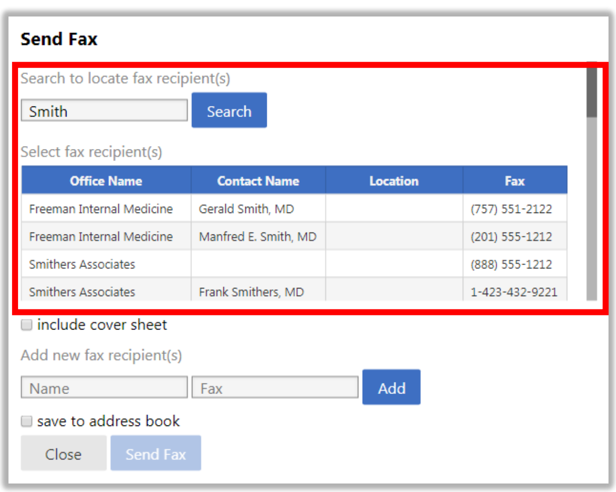
Click the “Fax” icon in the toolbar to open the “Send Fax” application.
This window is divided into two sections:
- Search for Fax Recipient
- Add New Fax Recipient

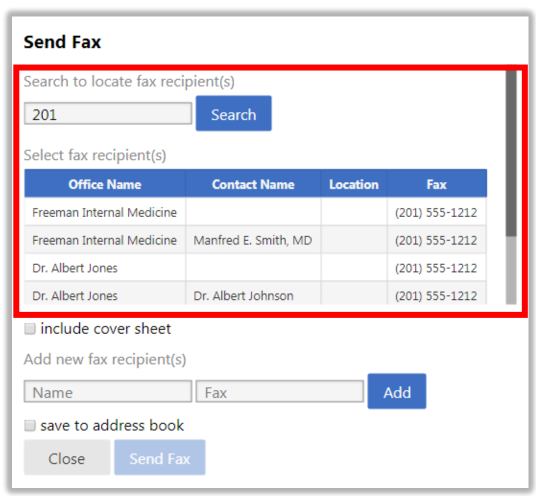
1
2


1 Search on Fax Recipient

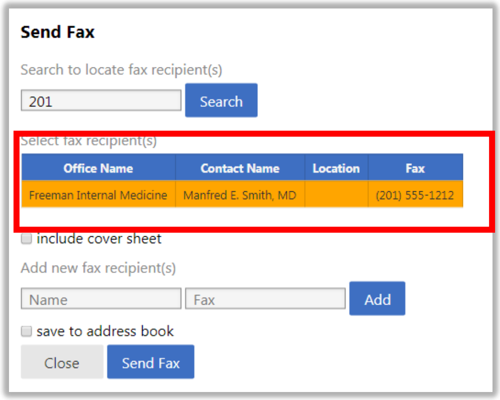
The first section of the window has the search window where a fax number can be searched. This option can be used to send the fax to a recipient who is already in the Address Book. To search on a recipient already in the address book:

1. Add the name or number in the field and click on the Search button



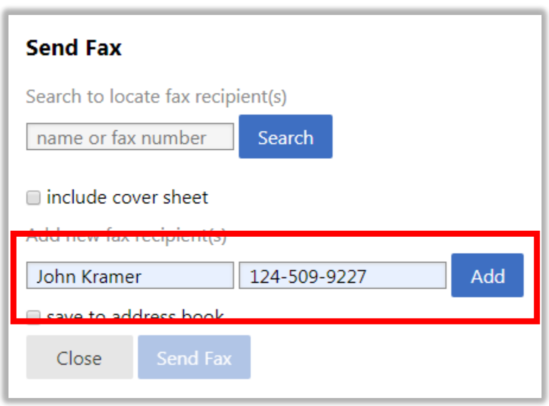


2. Click the row from search to add to the recipient list.



2 The second option is to add new fax recipients not currently in the address book. To add new recipients not already in the address book:

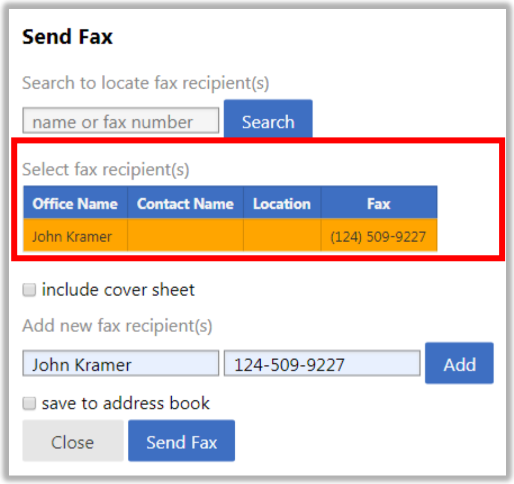
1. Add the name of the recipient and their fax number in the fields as indicated (see image below).



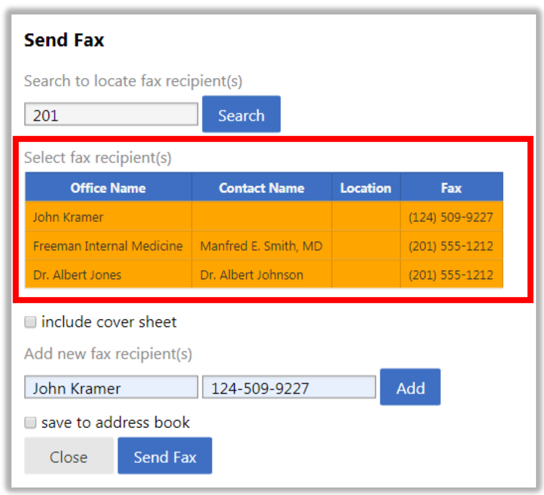
2. Click the “Add” button to the right of the name and fax number fields. This will add the recipient the recipient(s) list.

Notes on adding fax recipients:

1. Multiple recipients can be added to the same outgoing fax.



2. Existing recipients and new recipients can be added to a fax recipient list.



3. Checking the “save to address book” checkbox will add the name and fax number to the Address Book for future use.

4. Checking the “include cover sheet” checkbox will add the cover sheet to the fax as a first page. More information about the cover sheet can be found on page 83.

5. The “Close” button closes the window without sending the Fax while the “Send Fax” button sends the fax to the selected recipients.

7 Case Info: More information on Case Info can be found on page 23.

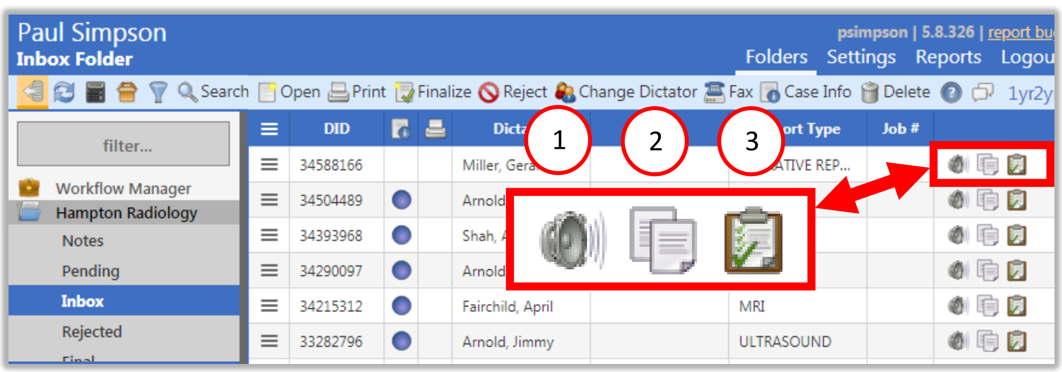
8 Delete: This allows the user to delete dictations and transcriptions from the workflow. For more information about deleting, please see page 27.

Columns

All available columns viewable in the Inbox and their descriptions can be found starting on page 28.

Columns unique to the Inbox are:

Actions: This column contains three icons:

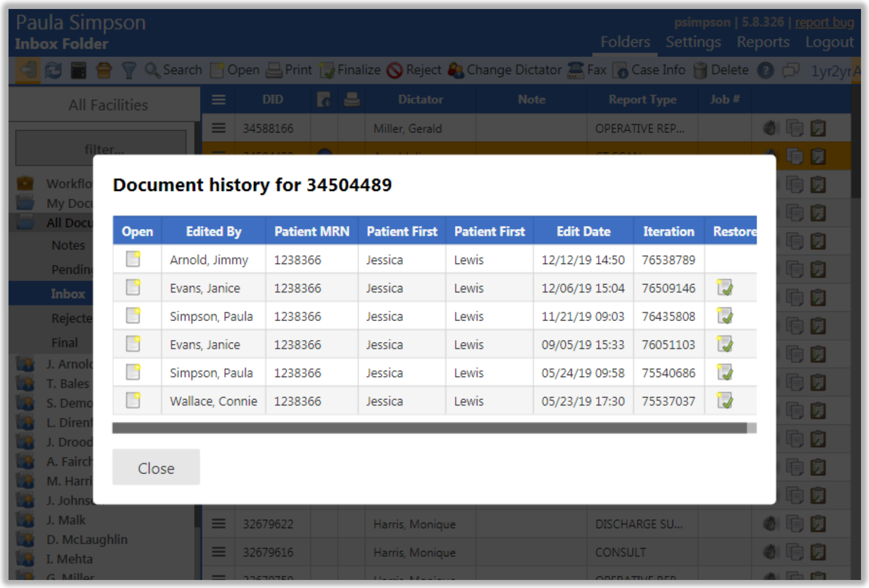


1 Play Audio: Clicking on the "Play Audio" icon downloads the audio file to the computer and plays it to the computer' default audio player.

2 Document History: Clicking on the "Document History" icon opens a pop up window that shows all iterations of the transcribed documents for the transcription.

A previous iteration of the document can be opened by double clicking on one of the rows in the Document History popup. This also uses the "Document Handler" software and opens the transcription document into Word.

A previous iteration of the document can be made as the current transcription document by using the "Restore" icon to the far right of the row. This overwrites the current copy of the document and can come in handy if an edit was made in error was made and a previous version of the document needs to be referred for rectifications.

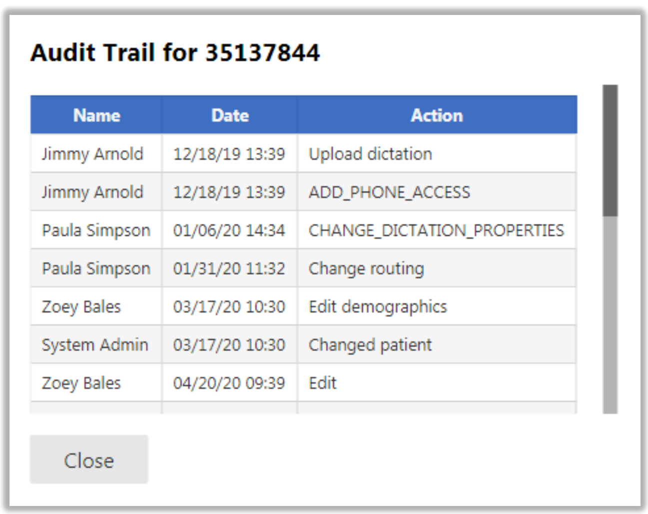


Document history for 34504489

Open	Edited By	Patient MRN	Patient First	Patient First	Edit Date	Iteration	Restore
	Arnold, Jimmy	1238366	Jessica	Lewis	12/12/19 14:50	76538789	
	Evans, Janice	1238366	Jessica	Lewis	12/06/19 15:04	76509146	
	Simpson, Paula	1238366	Jessica	Lewis	11/21/19 09:03	76435808	
	Evans, Janice	1238366	Jessica	Lewis	09/05/19 15:33	76051103	
	Simpson, Paula	1238366	Jessica	Lewis	05/24/19 09:58	75540686	
	Wallace, Connie	1238366	Jessica	Lewis	05/23/19 17:30	75537037	

Close

3 Audit Trail: This displays a list of all users who have accessed a document, the date/time of their access, and the action they performed, such as opening, editing, finalizing, esigning, etc. (see below).



Audit Trail for 35137844

Name	Date	Action
Jimmy Arnold	12/18/19 13:39	Upload dictation
Jimmy Arnold	12/18/19 13:39	ADD_PHONE_ACCESS
Paula Simpson	01/06/20 14:34	CHANGE_DICTATION_PROPERTIES
Paula Simpson	01/31/20 11:32	Change routing
Zoey Bales	03/17/20 10:30	Edit demographics
System Admin	03/17/20 10:30	Changed patient
Zoey Bales	04/20/20 09:39	Edit

Close

Column Management

See page 31 for a full description of column management features.

File Display

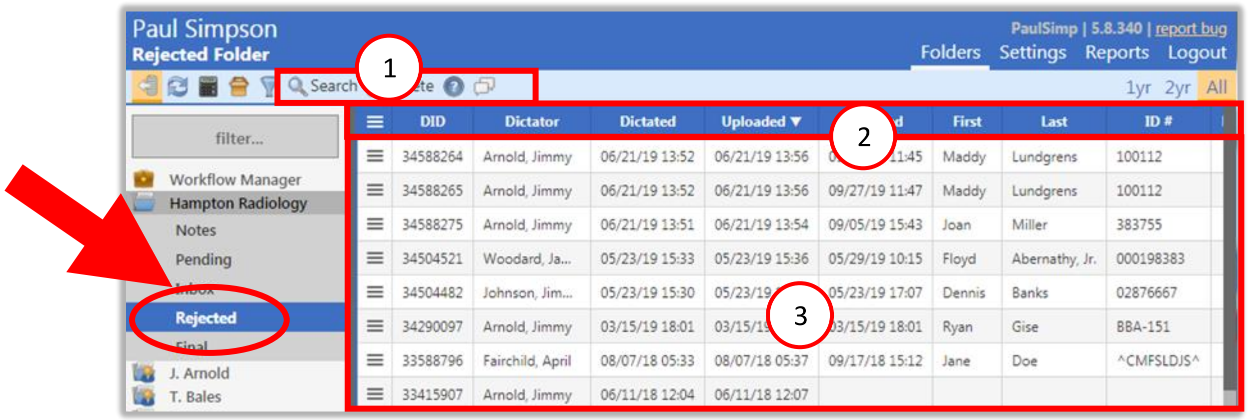
This section displays the dictations. All visible dictations in this folder are of the Pending status. For a detailed description of available file statuses and their meaning, see page 38.

File Action Menu

All available "File Action Menu" options viewable in the Inbox and their descriptions can be found starting on page 37.

Rejected

The Rejected folder displays transcriptions that have been moved to a Rejected status, either by the Dictator, or by a Transcription Team member.



The Rejected folder consists of three important areas:

1 **Folder Management Functions**: This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Rejected folder.

2 **Columns**: Rejected folder has several important columns available for the user.

3 **File Display**: The central section of the Portal displays the rejected transcriptions.

Folder Management Functions

The first six functions from the left are consistent in all folders and more information on them can be found on page 14. The next eight functions are explained in detail below:

Columns

All available columns viewable in the Rejected and their descriptions can be found starting on page 28.

Columns unique to the Rejected are:

Rejection Reason: This column displays the information provided by the Dictator while rejecting a transcription.

Column Management

See page 31 for a full description of column management features.

File Display

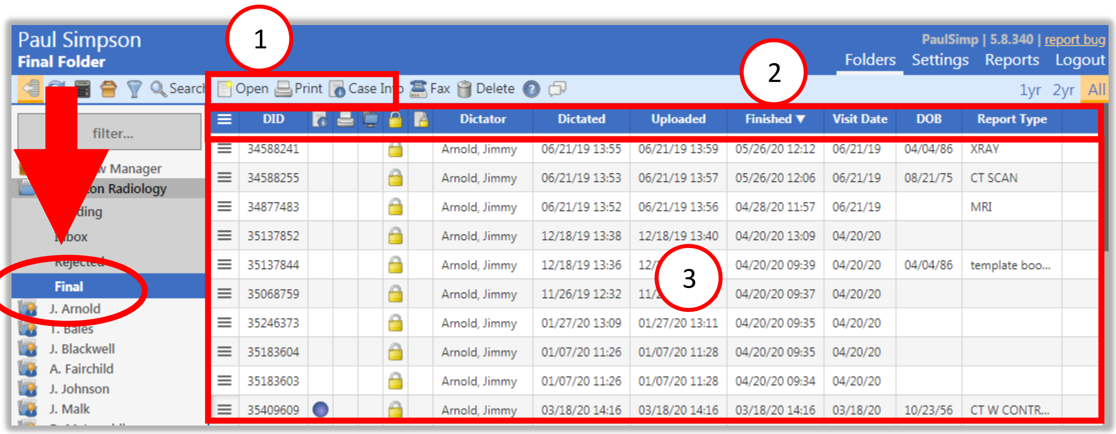
This section displays transcriptions that have been rejected by the Dictator. All visible transcriptions in this folder are of the Rejected status. For a detailed description of available file statuses and their meaning, see page 38.

File Action Menu

All available “File Action Menu” options viewable in the Rejected and their descriptions can be found starting on page 37.

Final

The Final folder displays transcriptions that have been Finalized, either by using the "Finalize" function in the Inbox, or by when the transcription gets esigned by the Dictator.



The Final folder consists of three important areas:

1 **Folder Management Functions**: This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Final folder.

2 **Columns**: Rejected folder has several important columns available for the user.

3 **File Display**: The central section of the Portal displays the finalized transcriptions.

Folder Management Functions

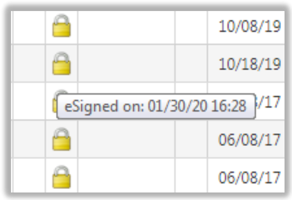
The first six functions from the left are consistent in all folders and more information on them can be found on page 14. The next eight functions are explained in detail below:

Columns

All available columns viewable in the Final folder and their descriptions can be found starting on page 28.

Columns unique to the Final folder:

eSigned: This column displays if the transcription has been electronically signed by the Dictator. This is displayed by a golden padlock icon appearing in the column if the document has received the electronic signature. Hovering the mouse over the padlock for a specific transcription displays the date and time of the esigning.



The electronic signature gets applied to the last line of the transcribed document. For example, a transcription esigned by Dr. Paul Simson would look like this:


***** Document e-signed by Dr. Paul Simpson on Thursday, May 28, 2020 at 3:36:05 PM *****

Column Management

See page 31 for a full description of column management features.

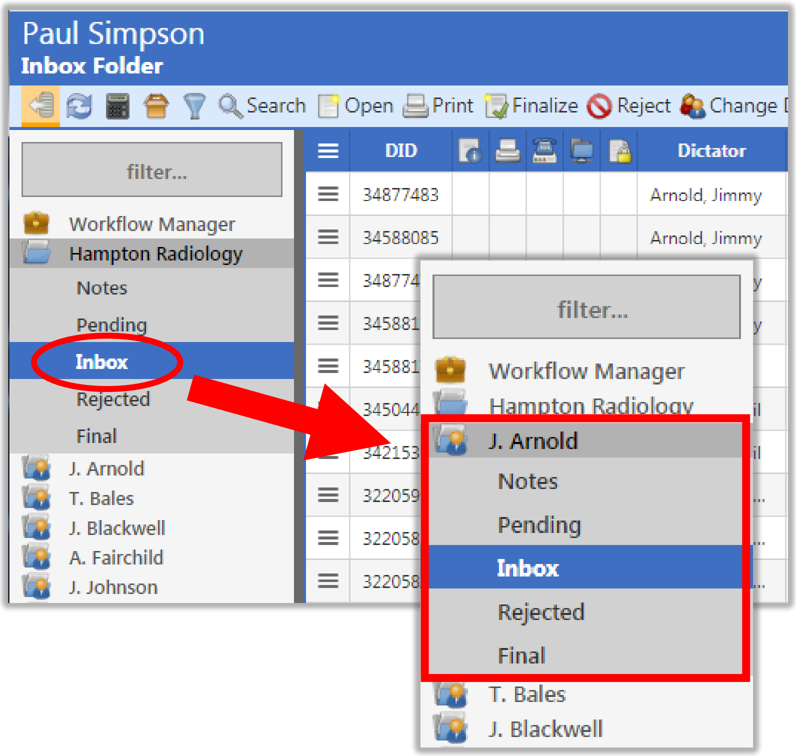
File Display

This section displays transcriptions that have been finalized by the Dictator. All visible transcriptions in this folder are of the Finalized status. For a detailed description of available file statuses and their meaning, see page 38.

File Action Menu

All available “File Action Menu” options viewable in the Final folder and their descriptions can be found starting on page 37.

Healthcare Provider Folders



Below the Facility folder are the individual Dictator folders. Dictator names appear in the folder pane by the last-name in alphabetical order.

Clicking a Dictator name expands the view to expose the folders available for each Dictator. Folders are permission-based, but typically include Notes, Pending, Inbox, Rejected and Final.

Document Management

This section of the manual provides details related to managing transcriptions.

Automatic faxing (auto-fax)

For details about how to set up Auto Print function, please contact WebChartMD Support team at support@webchartmd.com

Auto Print

For details about how to set up Auto Print function, please contact WebChartMD Support team at support@webchartmd.com

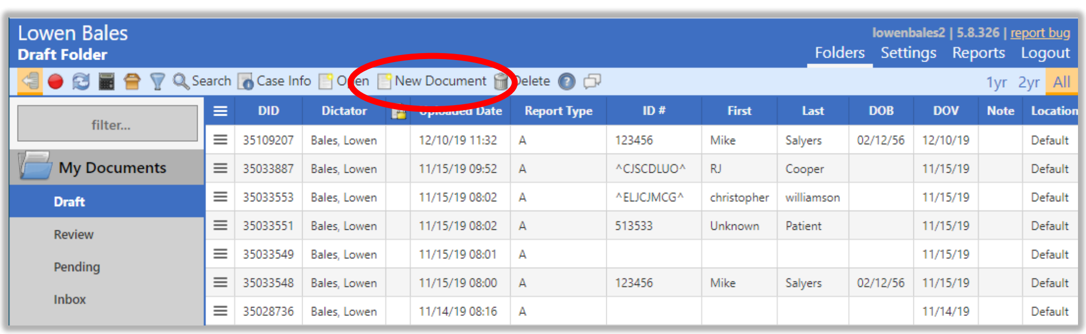
Using Dragon with WebChartMD

Dictators can incorporate front-end speech recognition tools like Dragon into their WebChartMD workflow. Instructions are included in the Facility user manuals but included here as a resource for the Transcription Team.

Please note: WebChartMD's front-end speech recognition workflow utilizes software already installed and purchased on the Dictator's computer. WebChartMD does not provide the front-end speech recognition software.

To incorporate front end speech recognition into the workflow, the Dictator follows these steps:

1. From the Draft folder, click the "New Document" button on the Folder Management toolbar.



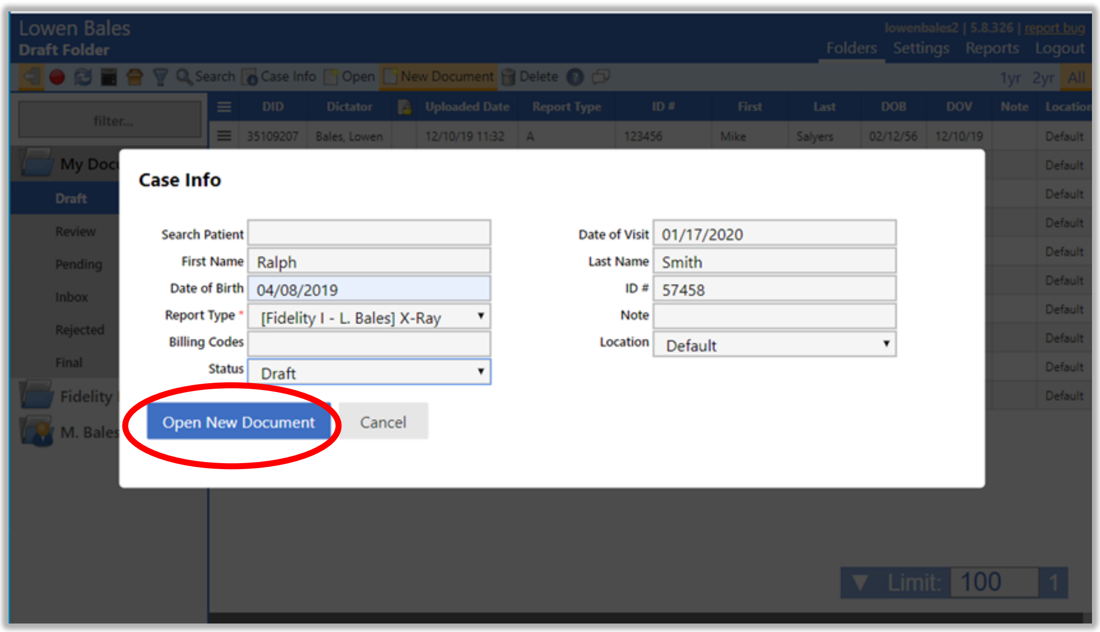
2. Click the "Case Info" window to enter demographics and make other selections relevant to the dictation.
    a. Add patient information if desired (not required).

b. Search for the patient using the "Search Patient" field. Previously transcribed patients will present in the search box.

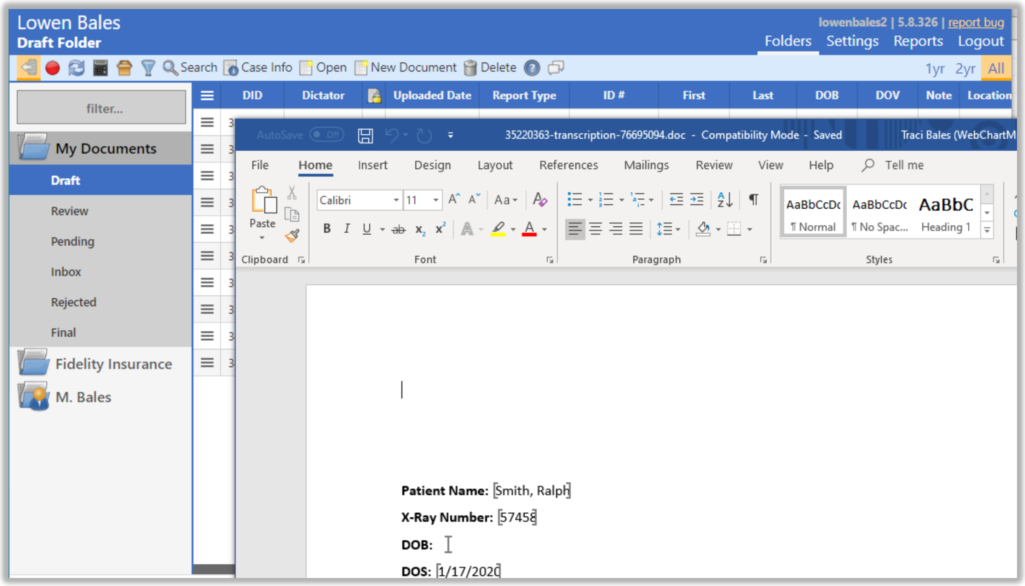
c. Select the "Report Type" (required entry) to use in conjunction with the workflow.

d. Select the "Status" for the file (required). If "Draft" is selected, the completed document will route to the Transcription Team for review and clean-up. If "Inbox" is selected", the document will by-pass QA and move directly to the Dictator's Inbox.

e. After filling out the information in the fields, click the "Open New Document" button in the Case Info box (below).



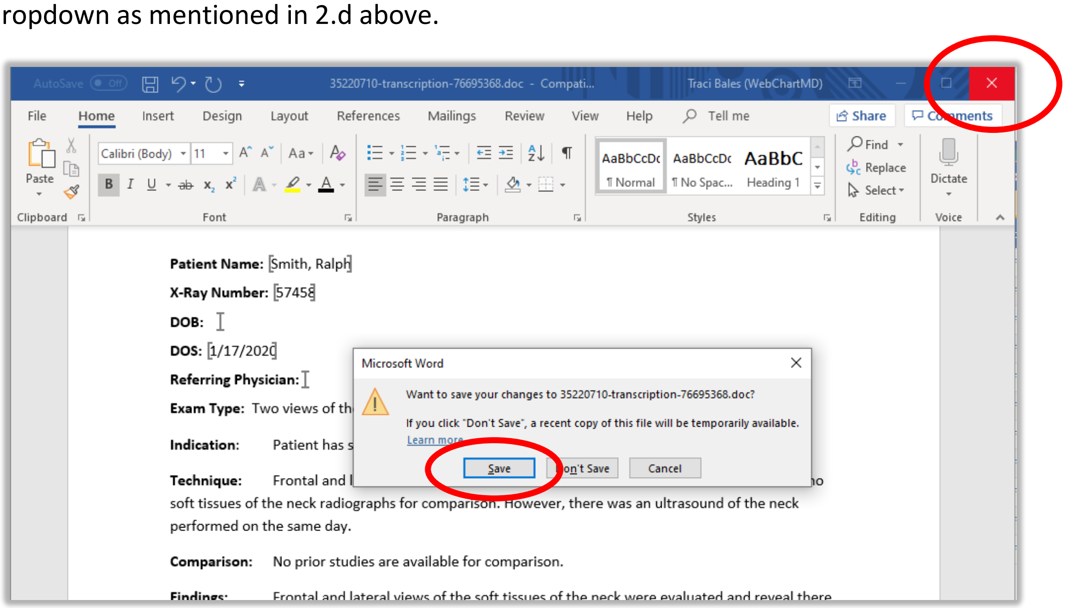
3. The selected template opens, and Case Information populates into the template (below).



4. The Dictator positions the cursor at each section / subsection of the template, and dictates using the front-end speech recognition software installed on the local computer.

5. Once completed, the Dictator presses “Save” to save the completed document.

6. Once saved and closed, the document will follow the routing rules selected in the “Status” dropdown as mentioned in 2.d above.



File Status

Every dictation and transcription passes through a variety of statuses as they progress through the transcription workflow, including:

Pending: This status signifies dictations that are yet to be transcribed.

Inbox: Dictations that have been transcribed and submitted to the dictator.

Rejected: Dictations that the dictator has returned to the Transcription Team for further corrections.

Finalized: The dictations that have been sent to the Dictator's final folder.

Delivered: this status is a combined term for both Inbox and Finalized transcriptions.

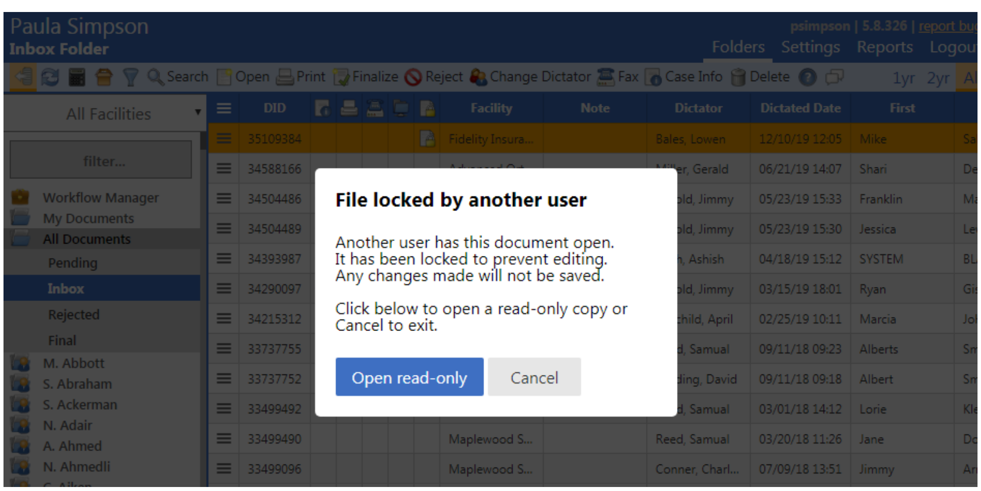
Deleted: this status means the dictation or transcription has been removed from the workflow and no longer accessible. Note – Documents can be taken out of the "Deleted" status by using the "Move" feature in the Workflow Manager. See page 26 for more details.

E-Signed: Transcriptions that the dictator has electronically signed.

Document Locking

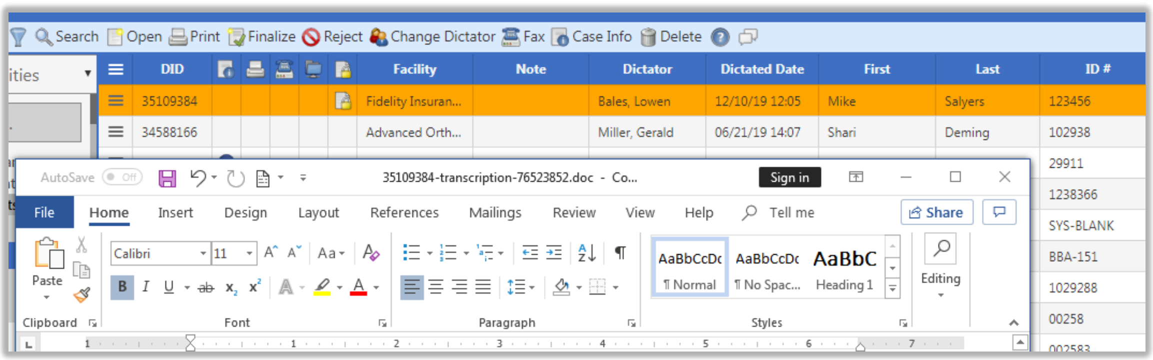
WebChartMD locks a document once opened by a user to prevent multiple users from accessing the document at the same time. Hovering over the "lock" icon on screen displays information about who is currently accessing the document, and the date/time of the access.

A pop-up message (below) alerts any users attempting to access that the document is already being accessed by another user, and that access to a read only version is available.

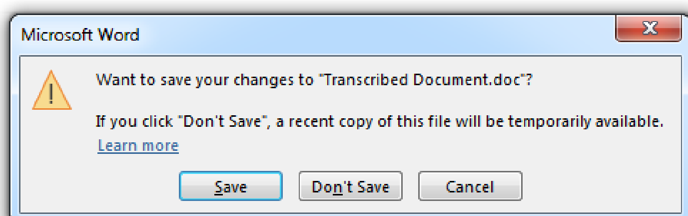


Edit

Edit is a permission-based function which enables users to edit transcriptions. As with the “Open” function, the edit function requires the installation of WebChartMD’s DocHandler. To edit a transcription, highlight the transcription and click the “Open” button in the toolbar. The transcription will open using the locally installed copy (i.e. the copy installed on the local computer) of Microsoft Word.



After edits are complete, save and close the transcription using the normal tools and workflow found within Microsoft Word. Clicking the “Save” button (below) saves changes to the authoritative copy of the transcription stored on the WebChartMD server and closes the transcription. Clicking “Don’t Save” exits the transcription without saving changes to WebChartMD. Clicking “Cancel” returns the user to the transcription.



Interfacing

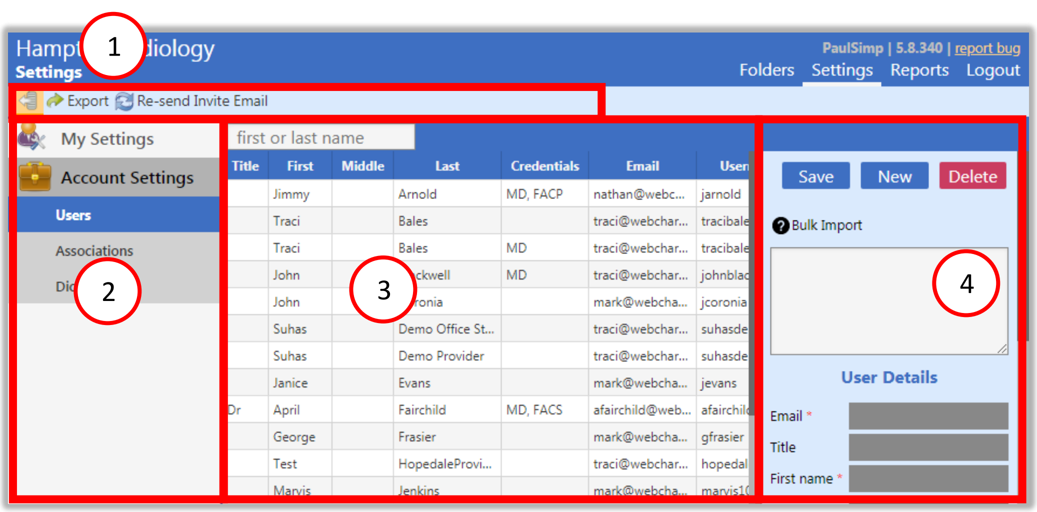
The Interface feature is part of a workflow created for interfacing transcriptions into electronic health record systems. For more information on creating custom interfaces, contact WebChartMD support. For a description of the “Interface Re-export” feature, see page 45.

Settings View

Settings View Overview

Clicking the “Settings” in the top right side of the Portal switches the “Folders View” to display the “Settings View” for the Transcription Team.

The Settings View can be broadly grouped into three visual areas:



1 Folder Management Functions: This Tools within the Folder Management toolbar vary according to the settings folder and permission levels of the user.

2 Settings Pane: This section displays different settings grouped into sections and subsections, providing the user with an ease of making changes.

3 User Section: This central section of the “Settings View” usually displays lists of users, both Transcription Team users and Facility users, to select from while editing their individual settings.

4 Details Panel: This panel in the right side usually provides the fields and dropdown menus of the actual settings.

Folder Management Functions

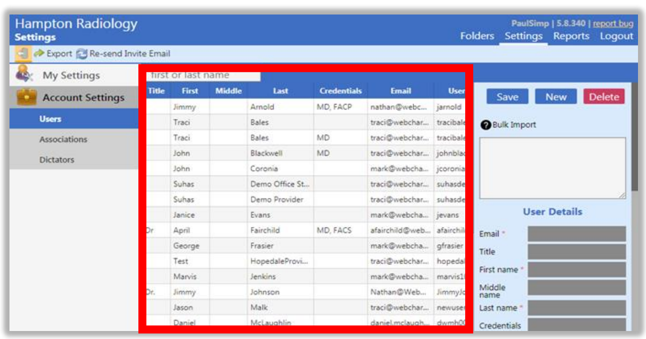
The Folder Management Functions appear as buttons in the ribbon at the top on specific Settings pages that they are relevant to.

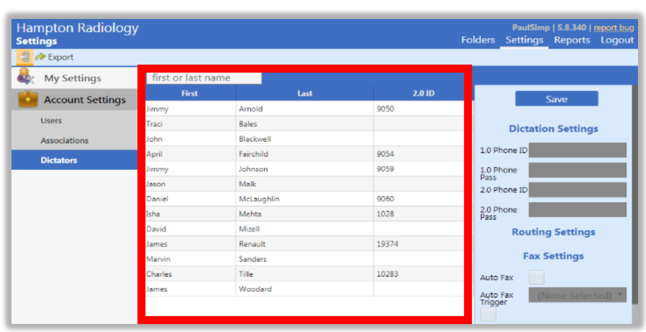
Settings Pane

The “All Facilities” option in the dropdown found in the top left corner of the Settings Pane displays workflow-related tools used by the Transcription Team in servicing their Facilities. Also displayed in the dropdown are each of the respective Facilities serviced by the Transcription Team. Selecting a specific Facility changes the view to display workflow-related tools specific to the Facility selected.

User Section

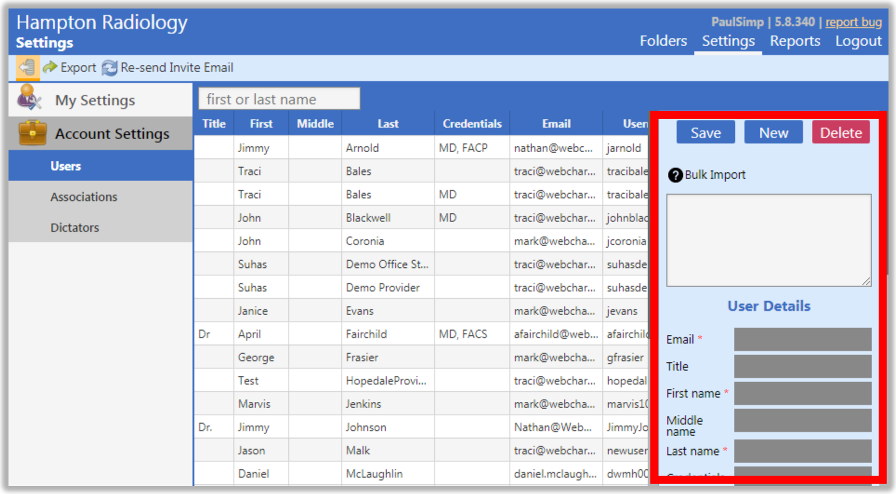
The central section of the Settings View area displays users as a selectable list. When selected, the individual settings available for that user loads into the Details Panel (explained next) on the right, allowing the Admin to change those settings. This section is shown in the next few images as examples:





Details Panel

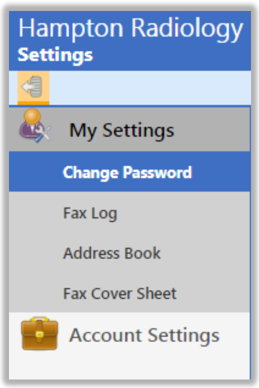
The section of the “Settings View” to the right of the “User Section” displays the individual settings for the selected users. This section is not always available in some Settings such as Associations windows where the central Users section displays two lists of users that need to be associated with each other and there are no individual settings to be altered for them.



Details Panel highlighted

My Settings

The Settings Menu displays when the user clicks on “Settings” in the top right side of the Portal.



Change Password is used for password updating.

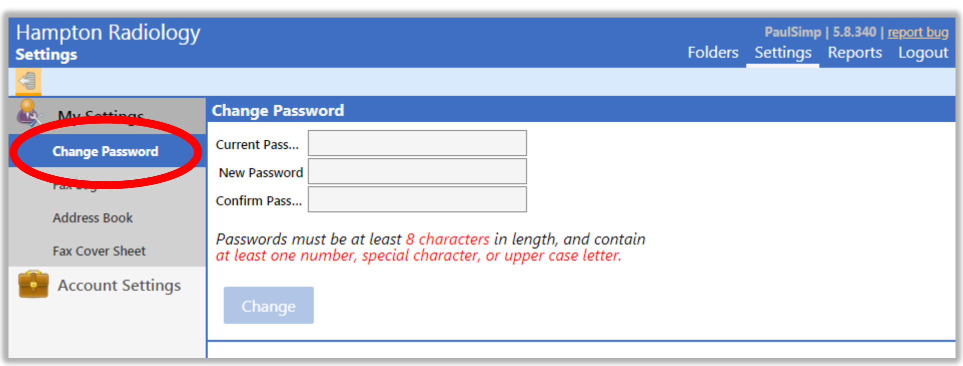
Fax Log displays the log of all auto-faxed and manually faxed transcriptions for the Facility.

Address Book displays in the “All Facilities” Settings Pane but is not used. All address books for Facilities are stored within their respective Named Facility views and discussed in the next section of this manual.

Fax Cover Sheet is used to add and manage a custom cover sheet that can be included with all out-going faxes for the Facility.

Change Password

Under My Settings, the **Change Password** feature enables the user to do a password change for his/her account. Passwords must be at least eight characters, and contain at least one number, special character or upper-case letter.



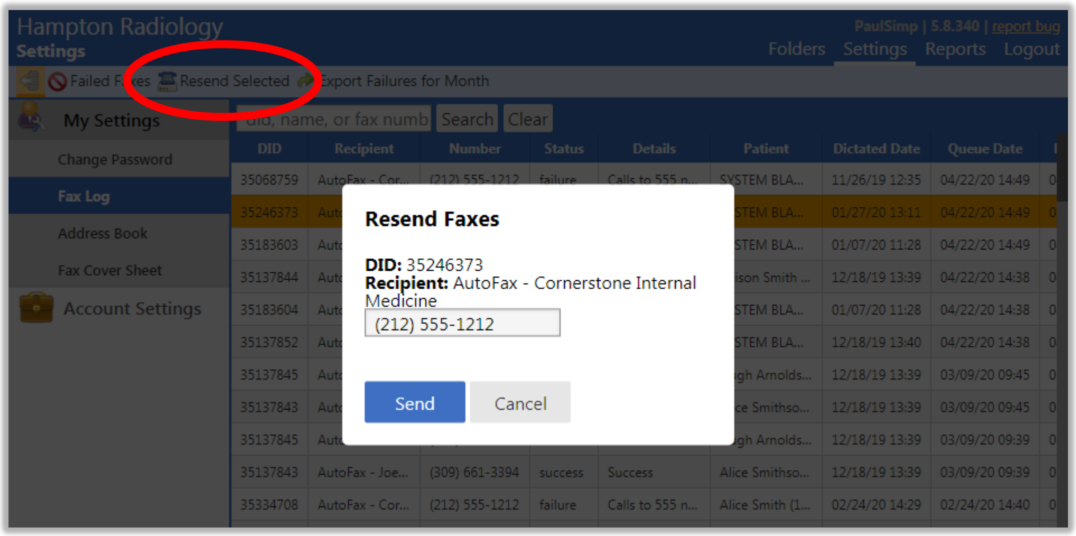
Fax Log

The “Fax Log” is a listed of all faxes transmitted by the Facility. The “Fax Log” toolbar contains a number of tools, which are described below.

Failed Faxes

The “Failed Faxes” button displays the list of all faxes which failed to transmit.

Resend Selected



The “Resend Selected” feature allows the user to resend transcriptions that failed to transmit. To resend a failed fax:

1. Click the failed transcription item in the Details Screen.

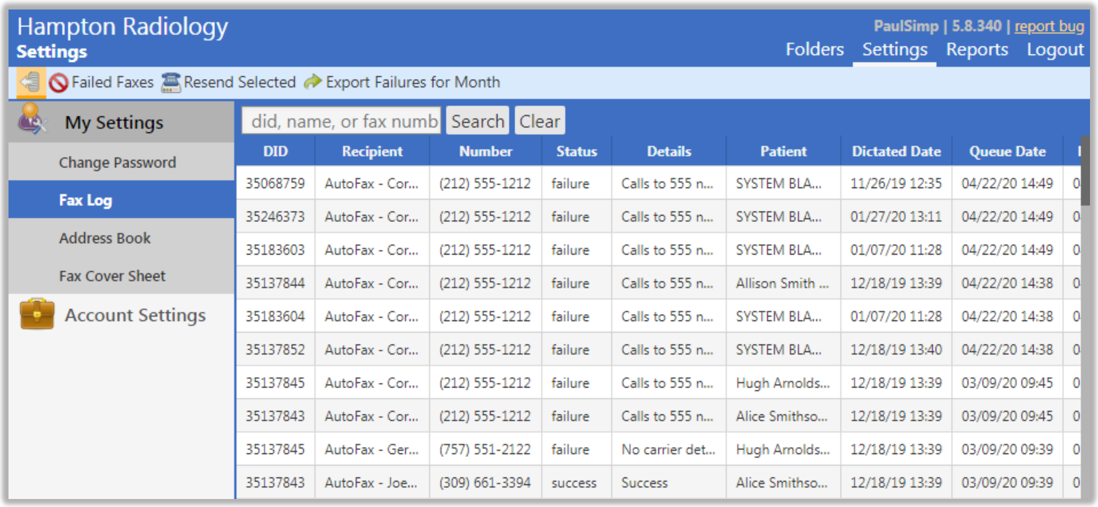
2. Enter the corrected fax number into the field where indicated (above image) and press the “Send” button.

Export Failures for Month

This feature is currently disabled.

Fax Log Column Display

Columns displayed in the Fax Log and their meanings are:



DID: Displays the DID number of the transcription that was faxed.

Recipient: Displays the name of the Address Book entry to whom the faxed transcription was faxed.

Number: Displays the fax number to which the transcription was faxed.

Status: “failure” means the fax failed to transmit successfully. “success” means the fax transmitted successfully.

Details: if the fax failed, a detailed description of the cause of failure is given.

Patient: Displays the name of the patient that the transcription was dictated about.

Dictated Date: Displays the time & date when the Dictation was dictated.

Queue Date: Displays the time & date when the transcription was triggered for auto-fax.

Process Date: Displays the time & date when the fax was sent successfully.

Address Book

The Address Book holds the contact information (and in particular the fax number) of entities and people that are fax recipients of the Facility.

Accessing Facility Address Books

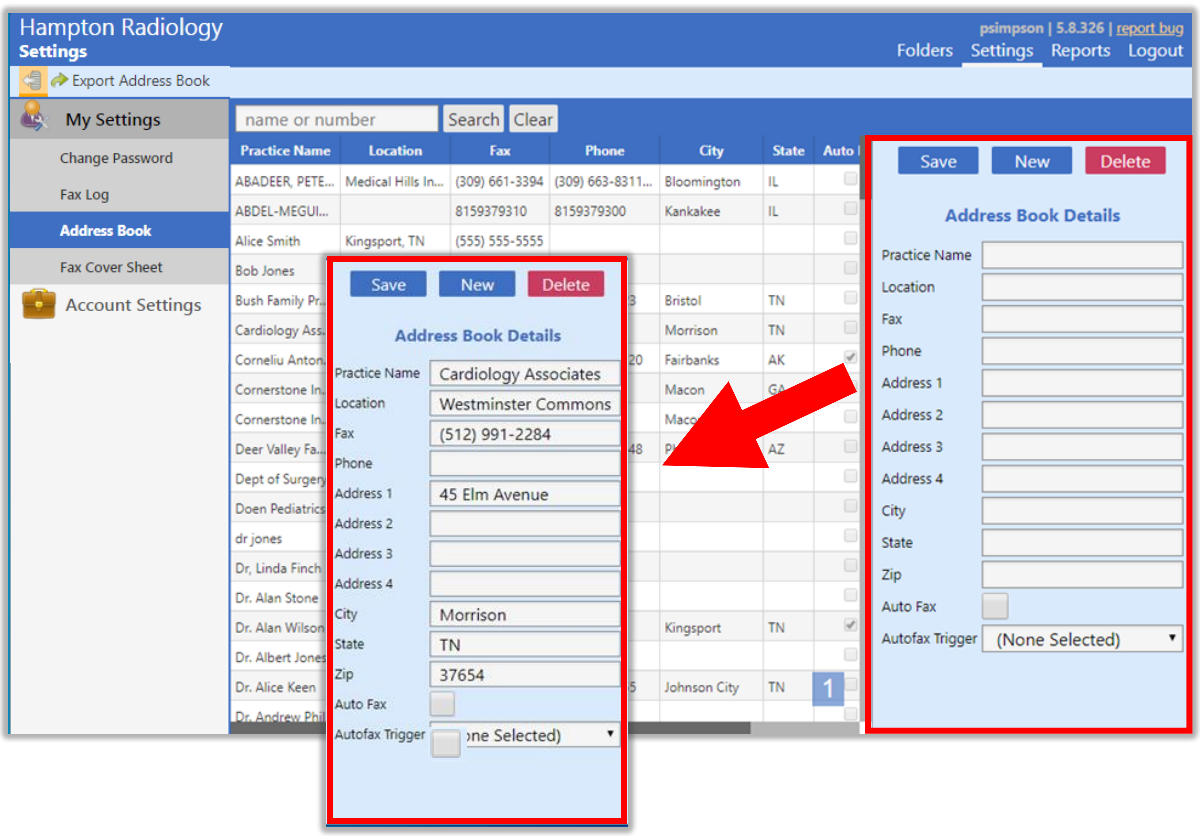
Address books for each Facility are stored separately and accessed via the dropdown in the top-left corner of the Settings Pane.

Adding an entry

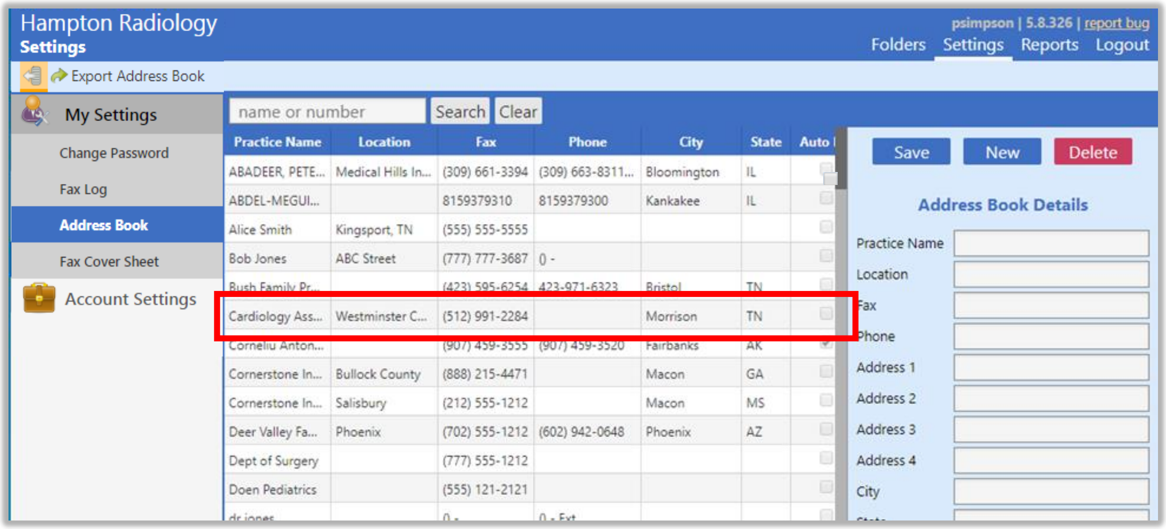
To add a new entry into the address book, follow these steps:

1. Press the “New” button in the Details Panel.

2. Fill in the applicable fields in the “Address Book Details” window, then click “Save”.



Once the address book entry has been added it will appear in the main address book window:

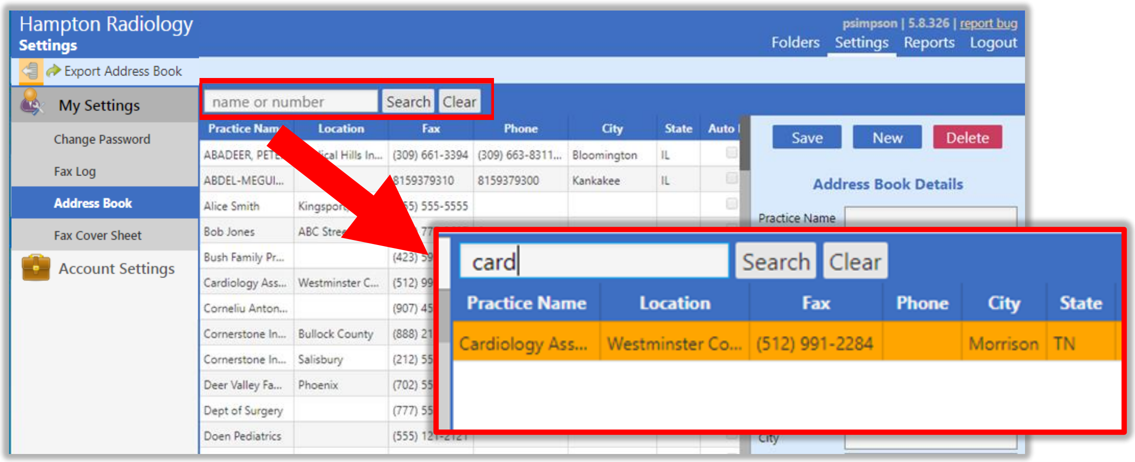


Notes related to address book entries:

1. The "Practice Name" field is often populated with the name of the recipient instead of the Facility. Keep in mind that whatever entry is made here is what the Transcriptionist will see when searching for the fax recipient during the transcription process. If the dictating healthcare provider normally references the physician recipient name when dictating, (i.e. "send a copy to Dr. John Smith", then the physician recipient's name should be added. If the dictating healthcare provider normally references a practice name (i.e. "send a copy to Milford ENT") then the practice name should be added.

Searching an entry

To search the address book, enter a name (or partial name), or the fax number (or partial number) into the search field and click the "Search" button. The "Clear" button clears the search parameters.



Auto-fax Setup

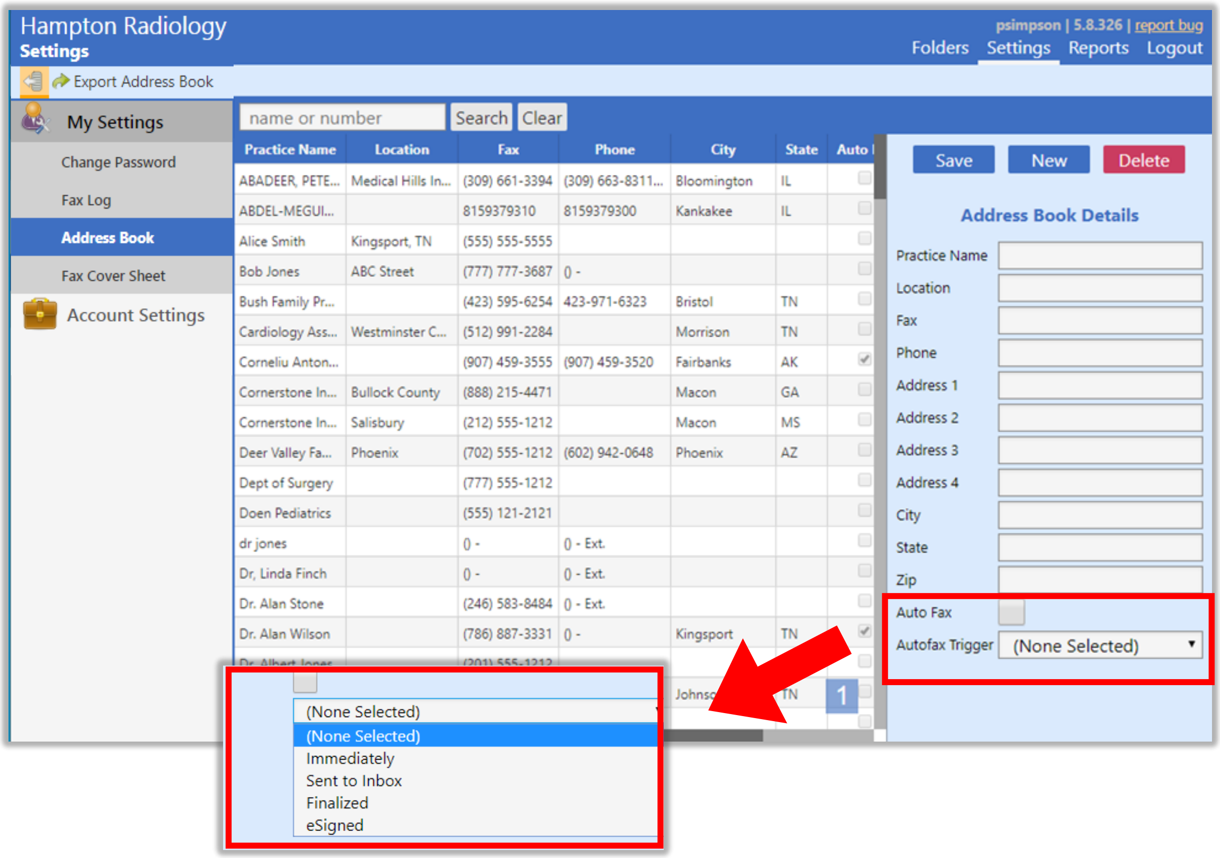
Auto faxing of transcriptions can be set up from the Address Book.

To enable sending of auto-faxes to the Address Book recipient:

1. Select the entry in the Address Book that will receive the auto-fax setting by clicking the row in the Address Book entry pane.

2. Checks the “Auto Fax” checkbox at the bottom of the Address Book Details Panel.

3. Select the desired auto-fax trigger from the dropdown in the “Auto-fax Trigger” box. Auto-fax Trigger options are:



Sent to Inbox: documents auto-fax when submitted to the inbox by the Transcription Team.

Finalized: documents auto-fax when moved to the Final folder from the Inbox.

Esign: documents auto-fax when eSigned by the provider.

Columns

The Main window of the address book will present the user with a list of address book entries. The columns headers identify demographic information for each address book entry. Those columns are:

Practice Name: This column displays the Name for the address book entry.

Location: This column displays the location of the Facility (if required). “Location” is used when a Facility has more than one office that is serviced by the Transcription Team.

Fax: This column displays the fax number.

Phone: This column displays the phone number.

City: This column displays the City.

State: This column displays the State.

Auto Fax: This checkbox displays a check if the auto-fax feature has been enabled for the Address Book entry.

Trigger: This column displays the trigger selected in the “Autofax Trigger”.

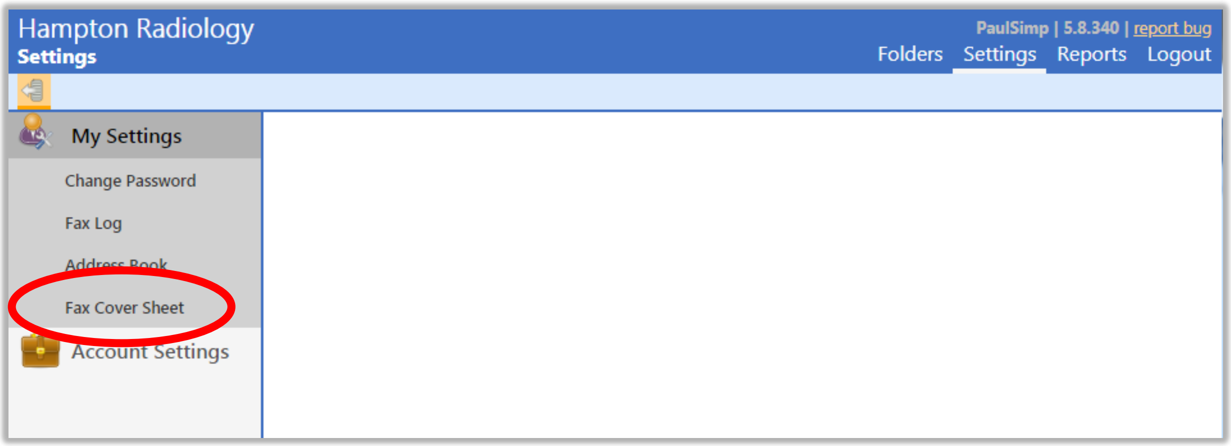
name or number | Search | Clear

Practice Name	Location	Fax	Phone	City	State	Auto Fax	Trigger
Dr. Alice Keen		(555) 555-5555	555-555-5555	Johnson City	TN	☐	eSigned
Dr. Andrew Phillipe		() -	() - Ext.			☐	eSigned
DR. BHASIN		(708) 799-2411	(708) 799-3044	HAZELCREST	IL	☐	
DR. BHOOPAL		(708) 388-4933	(708) 388-4911	PAOLS HEIGHTS	IL	☐	
Dr. David Andrews		() -	() - Ext.			☐	eSigned
Dr. David Harris		(575) 837-5467	() - Ext.			☐	eSigned
Dr. David Smelzer		(346) 546-4768	() - Ext.			☐	eSigned
Dr. Frank DeMollo		(888) 215-4471				☐	
Dr. Haines		() -	() - Ext.			☐	eSigned
Dr. Herald Jones		() -	() - Ext.			☐	eSigned
Dr. Janice Bays		(476) 327-5603	() - Ext.			☐	eSigned
Dr. Jay Goodpasture		() -	() - Ext.			☐	eSigned
Dr. Jenny Lawrence		8882154471	() - Ext.			☐	eSigned
Dr. John Smith		(555) 555-6392				☑	Finalized
Dr. John Smith		(555) 555-0345				☑	Sent to Inbox
Dr. John Smith MD		(555) 555-5555	() - Ext.			☐	eSigned
Dr. John Smithson		(555) 555-5555				☐	(None Selected)
Dr. John Taylor		(987) 098-7580	() - Ext.			☐	eSigned

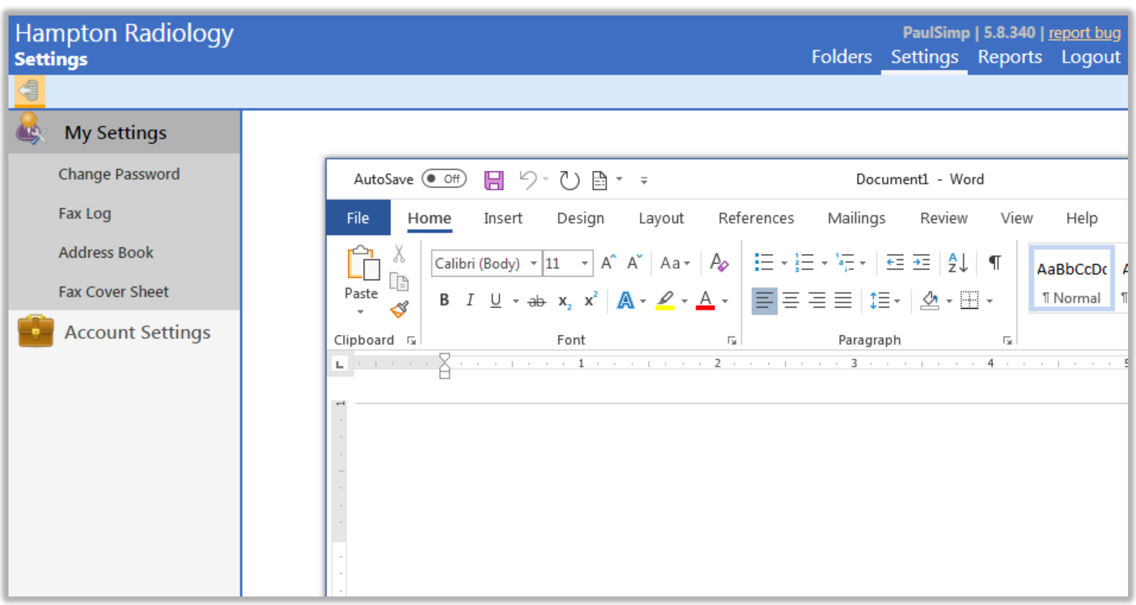
Fax Cover Sheet

The “Fax Cover Sheet” stores the fax cover sheet that can used with fax transmissions. This page can be customized for each Facility.

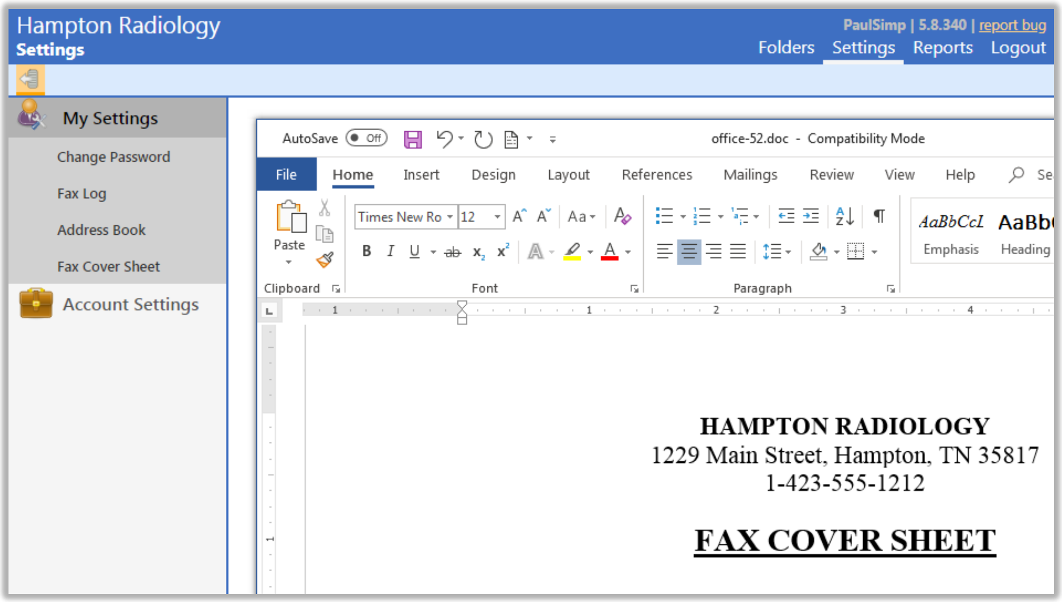
To customize the fax cover sheet:



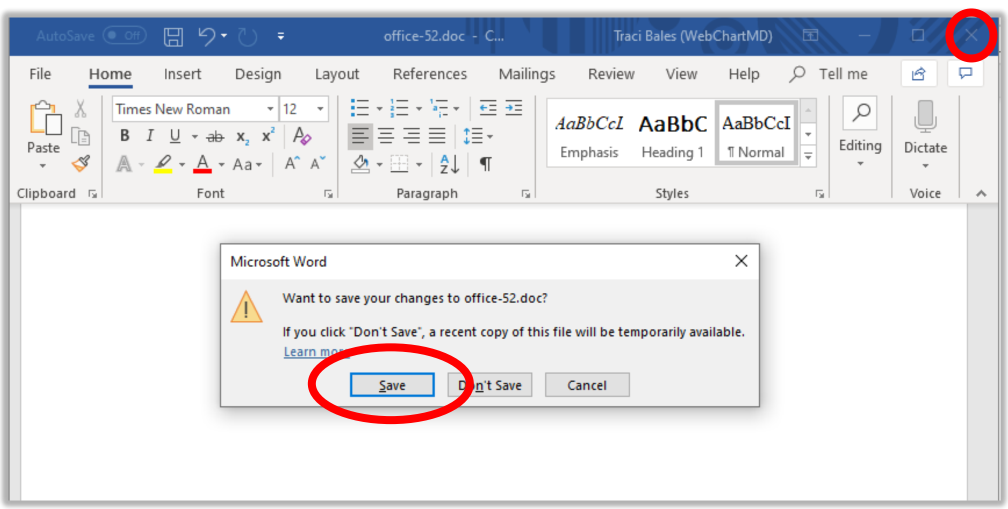
1. Click the “Fax Cover Sheet” link in the Folder Pane.



2. A blank page in Microsoft Word opens. Copy/paste an existing cover sheet on file into the blank document or create a new one in the blank document.



3. Save (not "Save As") and close the completed document.



To modify an existing coversheet:

1. click the "Fax Cover Sheet" link.
2. Edit directly into the Microsoft Word document that opens.
3. Save and close the updated cover sheet.

Once a cover sheet has been created, it will automatically fax with all outgoing faxes.

Account Settings

The settings menu displays under “Account Settings”.

Users

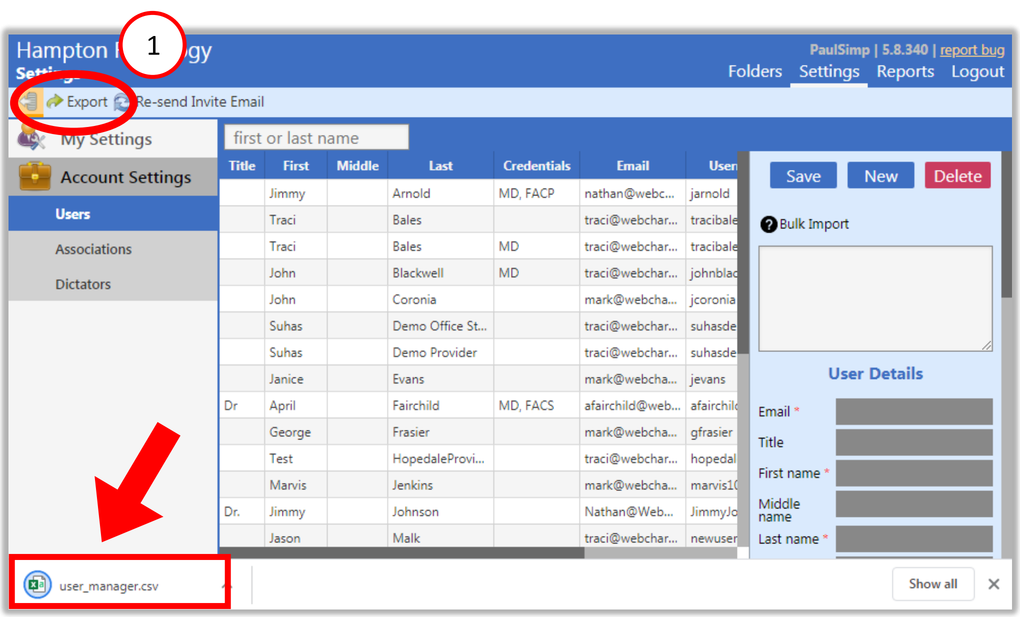
The “Users” section under the “Settings” is used to add and manage Facility users, such as Dictators, Administrators, Staff and other user types which are explained later in this section.

Folder Management Functions

This settings folder has two Folder Management Function button available in the ribbon at the top.

- Export
- Re-send Invite Email

1 Export

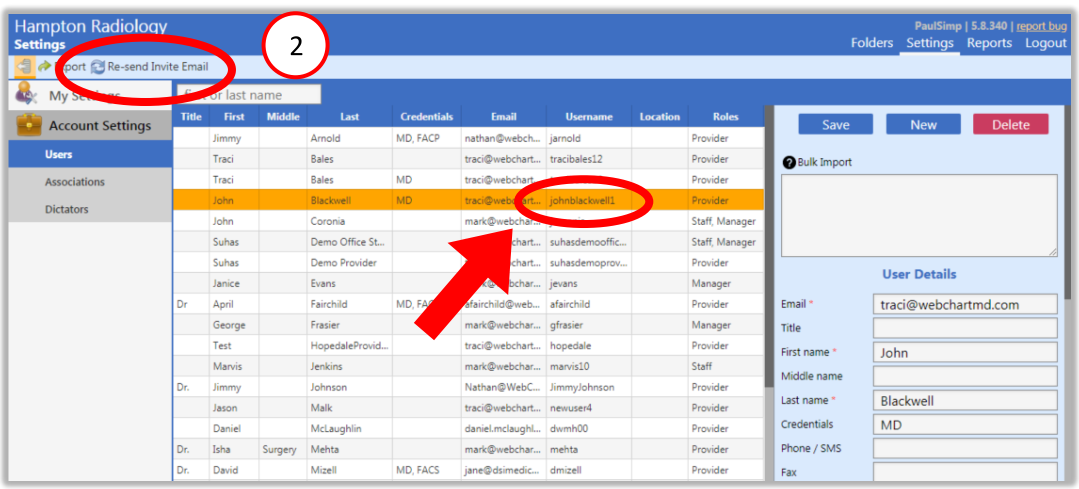


The list of users can be exported to a Microsoft Excel . To export, click the “Export” button in the toolbar. The exported file downloads to the Download folder, and in most browsers can be seen in the bottom edge of the screen (see below).

Re-send Invite Email

When a new user account is created, a system-generated “Welcome”, or invitation, email is automatically sent to the email used in the user’s account creation. The invitation email contains a link that allows the user to create a unique username and password.   Prior to the user creating a unique username, a temporary username is assigned using the format “firstnamelastname1”, e.g. “clarkjordan1” (see image below).

The User section contains a “Re-send Invite Email”. This feature is used in situations where the initial user registration is sent to one email address (e.g. to an administrator), but then later is taken over by the intended user. In that case, the original email address entered into the “Email” field is replaced by that of the intended user, and the invitation email resent via the “Re-send Invite Email” button.

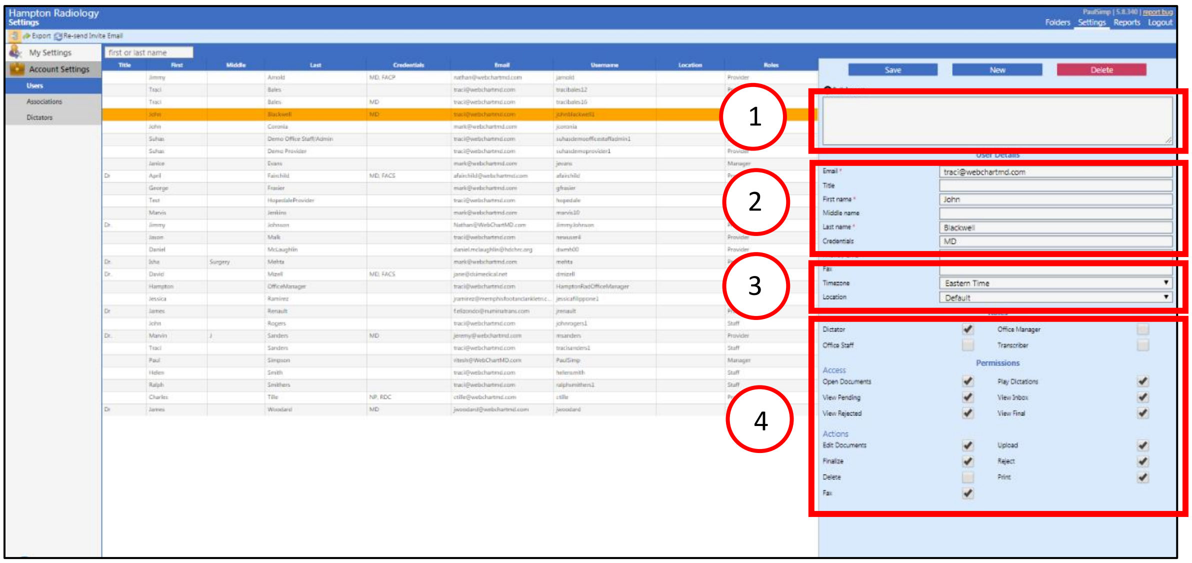


Notes on Re-send Invite Email feature:

- Once the user creates a unique username, the “Re-send Invite Email” is disabled to prevent multiple usernames from being created.

The User Details Panel

The “User Details” panel has five sections:



1 Bulk Import: This feature allows the bulk import of new users from an Excel or .csv formatted spreadsheet.

2 User Details: contains identifiers related to the user.

3 Roles: provides the definition of the user’s role.

4 Permissions: defines the permissions assigned to the user. This section is comprised of four subsections: Access, Actions, Administrative and QA, which will be defined later in this section.

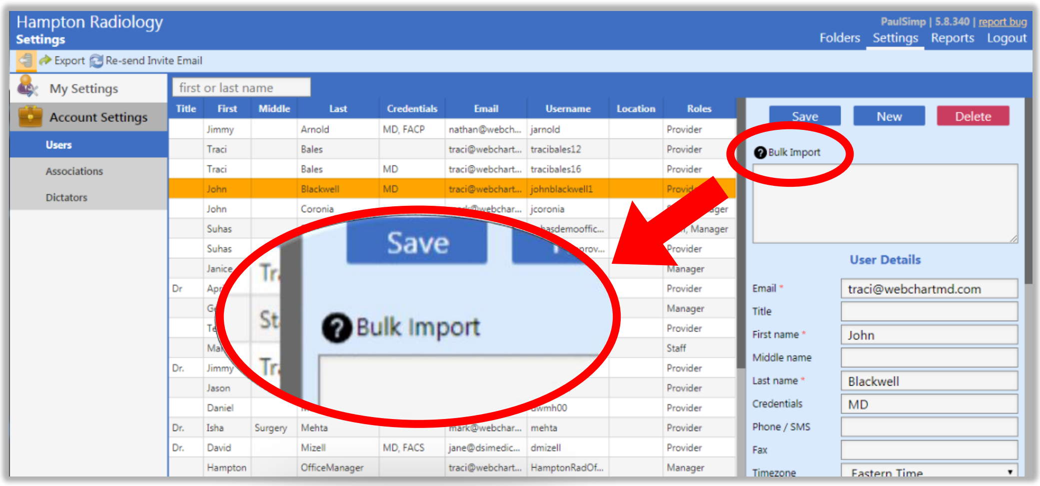
Bulk Import

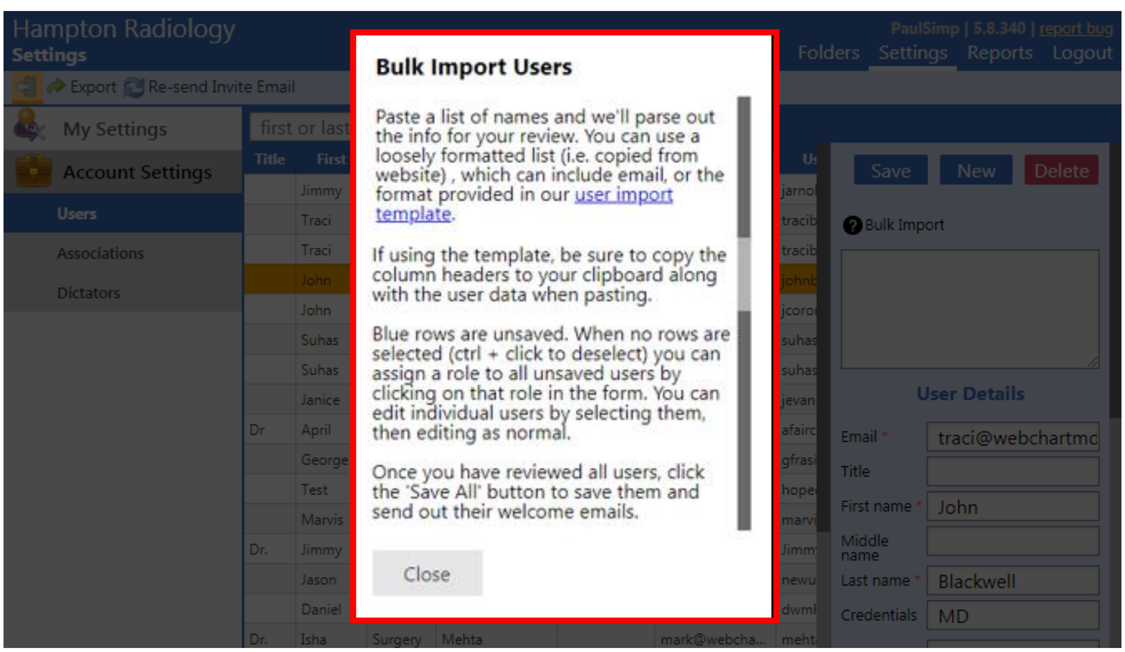
“Bulk Import” allows multiple users (up to 500 at a time) to be added as users to an Account.

To use the “Bulk Import” feature:

Step 1

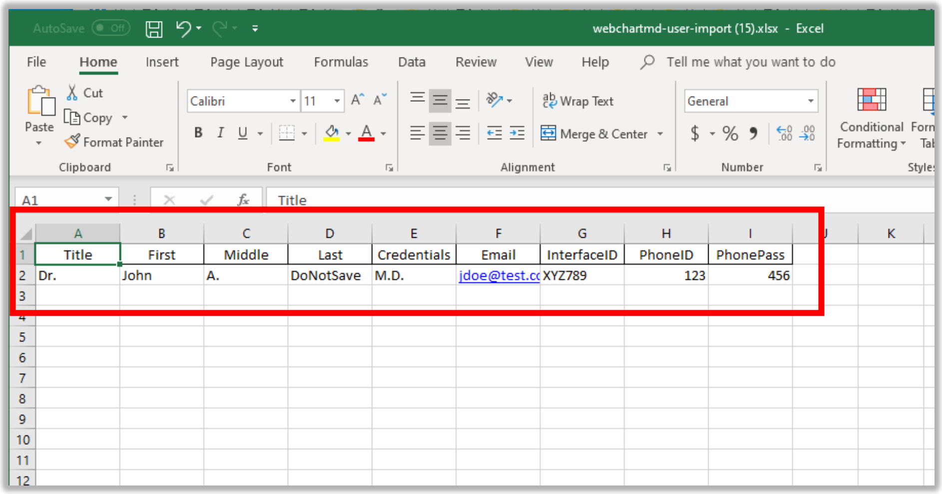
Confirm that the spreadsheet's data column names match those provided in the template sample found in the "**?**" icon found in the top-left corner of the bulk import window (below). Not all columns are required, but column names must match in order for data to import successfully.





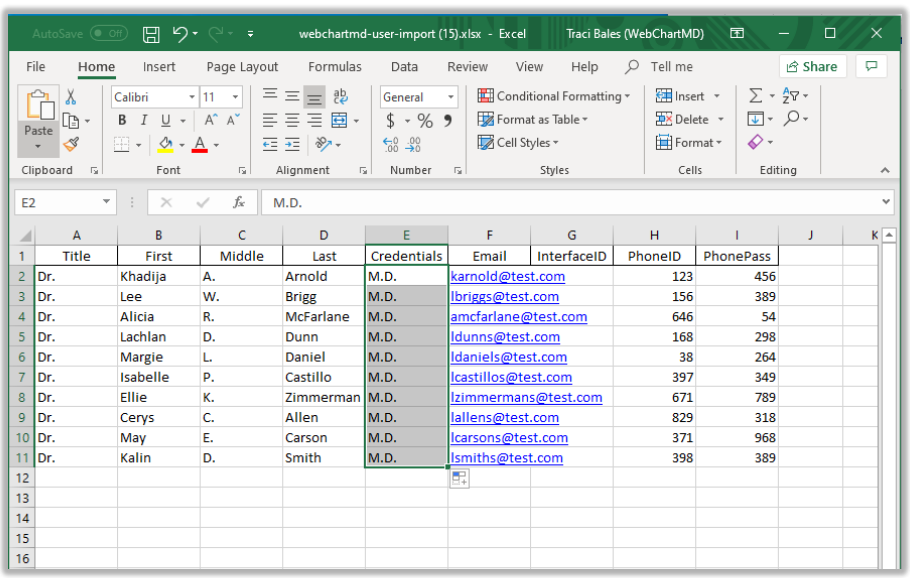
To download the template sample with available columns, click the "user import template" link (above).

Columns available for import are defined in the “user import template”, and an example of how data should be formatted are as pictured below:



Title	First	Middle	Last	Credentials	Email	InterfaceID	PhoneID	PhonePass
Dr.	John	A.	DoNotSave	M.D.	jdoe@test.cc	XYZ789	123	456

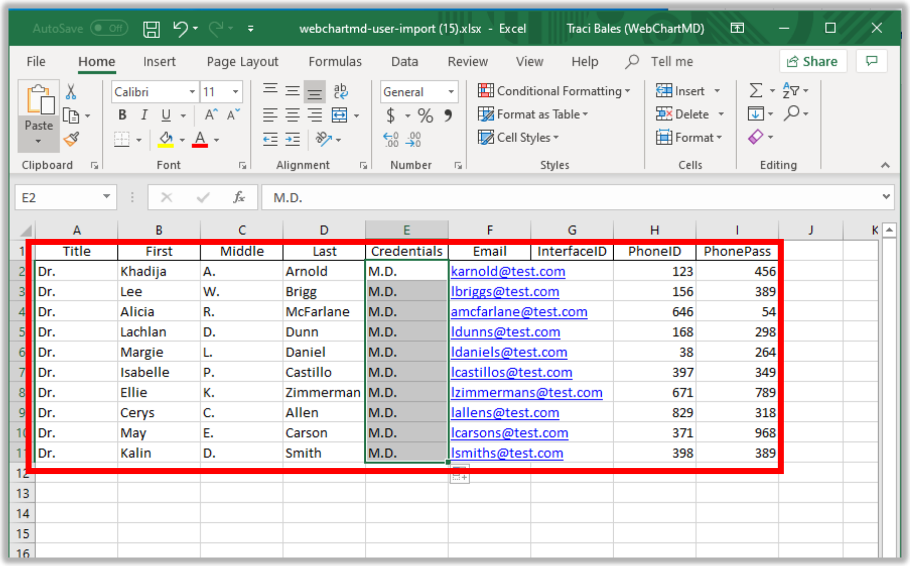
An example of a properly formatted bulk import excel sheet appears below:



Title	First	Middle	Last	Credentials	Email	InterfaceID	PhoneID	PhonePass
Dr.	Khadija	A.	Arnold	M.D.	karnold@test.com		123	456
Dr.	Lee	W.	Brigg	M.D.	lbriggs@test.com		156	389
Dr.	Alicia	R.	McFarlane	M.D.	amcfarlane@test.com		646	54
Dr.	Lachlan	D.	Dunn	M.D.	ldunns@test.com		168	298
Dr.	Margie	L.	Daniel	M.D.	ldaniels@test.com		38	264
Dr.	Isabelle	P.	Castillo	M.D.	lcastillos@test.com		397	349
Dr.	Ellie	K.	Zimmerman	M.D.	lzimmermans@test.com		671	789
Dr.	Cerys	C.	Allen	M.D.	lallens@test.com		829	318
Dr.	May	E.	Carson	M.D.	lcarsons@test.com		371	968
Dr.	Kalin	D.	Smith	M.D.	lsmiths@test.com		398	389

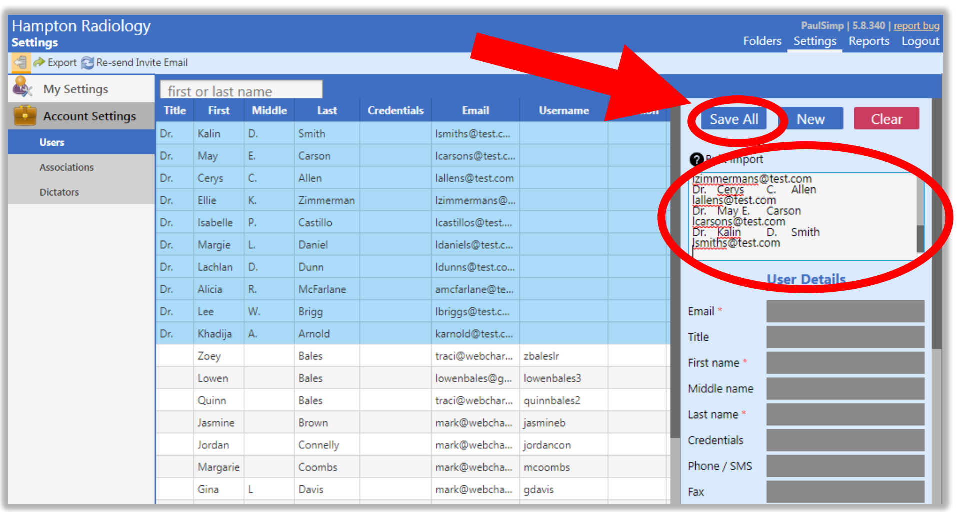
Step 2

Copy the columns and column headers from your (important) to your Microsoft Excel clipboard. Make sure to select and copy only those rows and columns that hold data required to be imported.



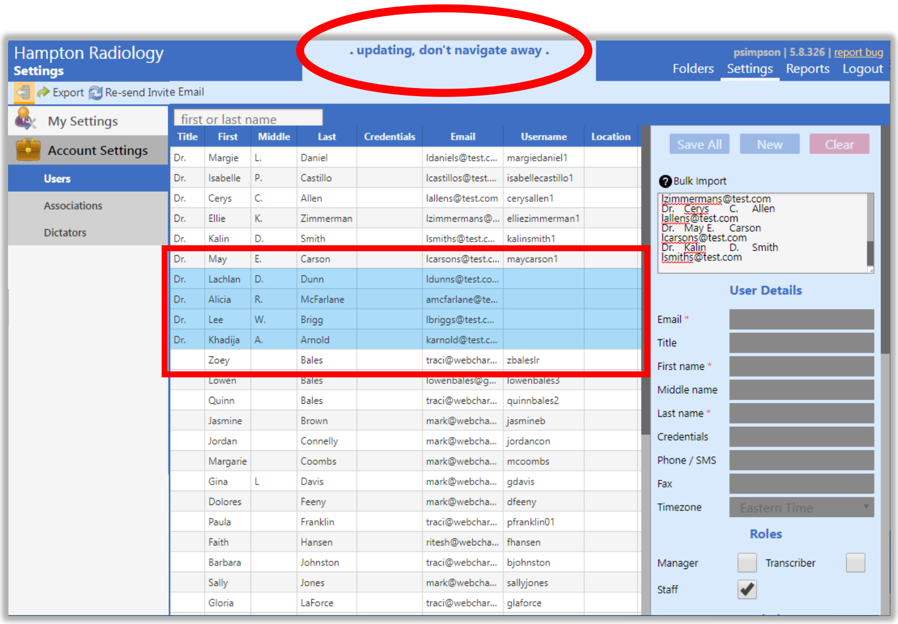
Step 3

Paste the copied selection into the “Bulk Import” window. After pasting, data will appear on screen highlighted in blue. Click the “Save All” button in the User Details panel. This initiates the saving process.



Step 4

As user data saves to the database, a message appears at the top of the screen: “updating, don’t navigate away” (see below). Rows on screen turn from blue to white as the user data is committed (saved) to the database (see below).



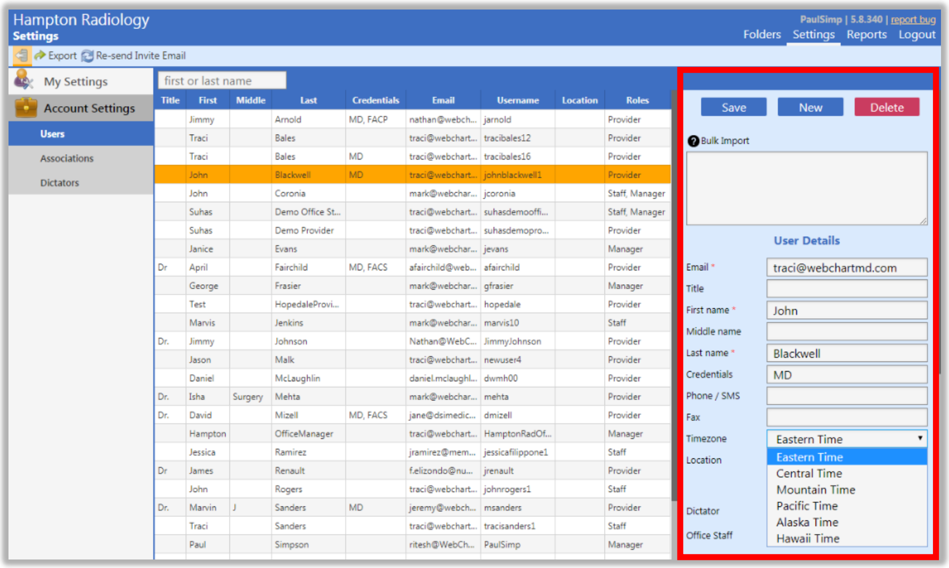
Notes on Bulk Import:

1. Data will load into the database exactly as it is formatted on the excel sheet that is used for the bulk import. For example, if physician names are in “all caps” on the excel sheet, they will appear in “all caps” within WebChartMD and on any document that are processed through WebChartMD.

2. The order of the columns on the spreadsheet used to import data do not need to match those of the “user import template” sample provided. However, column names must match those provided in the “user import template”.

User Details

This section records the personal identifiers of the new user such as name, work title, credentials, phone & fax numbers and time zone. Required fields are marked with a red asterisk.



Fields within User Details

Email: This is a required field. The email address is part of a new user notification feature of the system. If this email address is incorrect or misspelled, the new user will not receive the system email used to create a unique username and password. See the "Resend Invite Email" section on page 86 for more information on the importance of the email field.

Title: Optional field for title (Mr., Ms. Dr., etc.) of the new user.

First name: Required field for the first name of the user.

Middle name: Optional field for the middle name of the user.

Last name: Required field for the last name of the user.

Credentials: Optional field for Dictator credentials (MD, FACS, etc.)

Notes on Credentials field:

1. While optional, this field is an important component of the auto-populating feature used with the signature line for the Dictator on transcriptions. Credentials will appear following the Dictator's name on the signature line exactly as they are entered into the Credentials field. For example, if Dr. John Smith wishes his signature line to read "John Smith, MD, FACP", then the Credentials field needs to be populated with "MD, FACP" (no quote marks).

2. While a minor formatting point, Dictators sometimes have very specific formatting preferences, such as the additional or absence of periods "M.D." For that reason, make sure that the characters entered into the Credentials field are consistent with the Dictator's preferences.

Phone/SMS: Optional field for contact information.

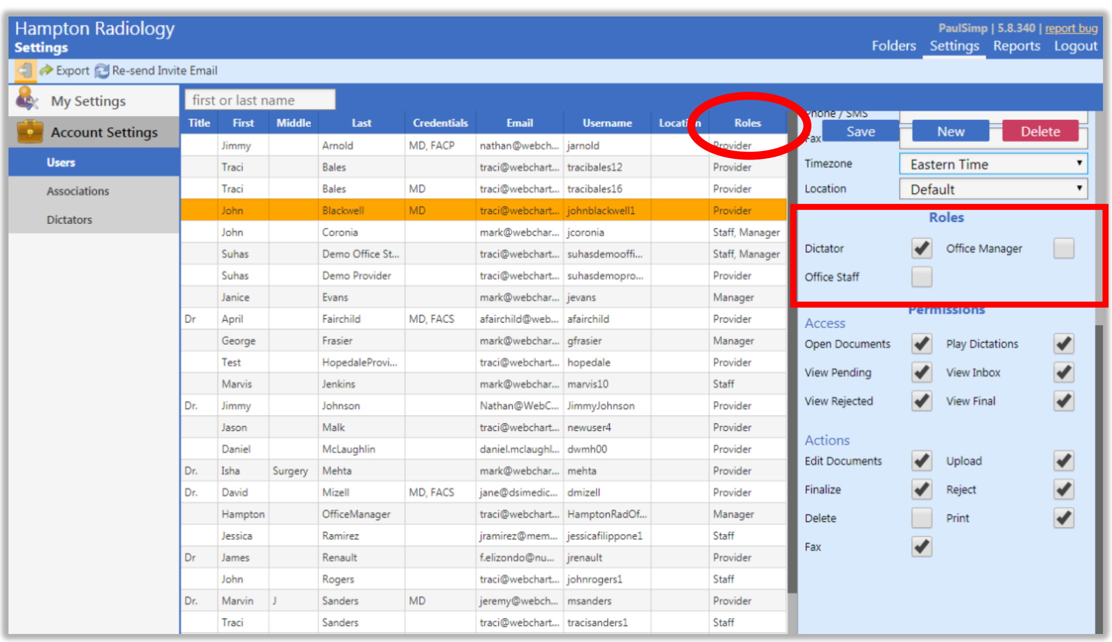
Fax: Optional field for fax number.

Time zone: Optional field for setting the time zone of the new user. The default is Eastern Time zone. While optional, this field is very important to the accurate presentation of date and time information within the Folders views, and also for STAT and on-time management of the dictations. Make sure the user's time zone is set correctly with the Details Panel. For more information on STAT and on-time management, please see page 68.

After completing all required and desired fields, press the "Save" button in the User Details panel to add the new user.

Roles

This section sets the Role assigned to the new user. Once a Role selection is checked, the "Roles" column displays the Role established for the new user (see below).



Roles available include:

Dictator

The “Transcriptionist” role is that of a Transcriptionist or QA editor working on the Transcription Team. Users under this Role have limited permissions by default but can have those permissions added to their user profile by a Manager.

Office Manager

The “Manager” role is an administrative position within the Transcription Team. By default, the Manager has access to all administrative functions with the Transcription Team’s account. The Manager also has access to all workflow controls for dictations and transcriptions and can perform administrative duties such as creating and managing accounts, creating and managing users for both the Transcription Team and Facilities, and access to all reporting tools. Each of these administrative functions will be described in detail in upcoming sections.

Office Staff

The “Staff” role is similar to the Manager role, but without any default permissions. Managers often are Transcription Team members responsible for some part of the overall workflow, such as QA editing or some area of operations. As such, Staff may be given certain administrative permissions (such as “Edit Templates” or “Route Dictations” but not given others (such as “Edit Line Settings” or “Edit Pools”).

Notes on Roles:

1. Multiple Roles can be assigned to a user. When multiple Roles are assigned, Roles display in the Roles column separated by a comma.

2. For more information about adding or removing permissions is explained in the next section called “Permissions”.

Permissions

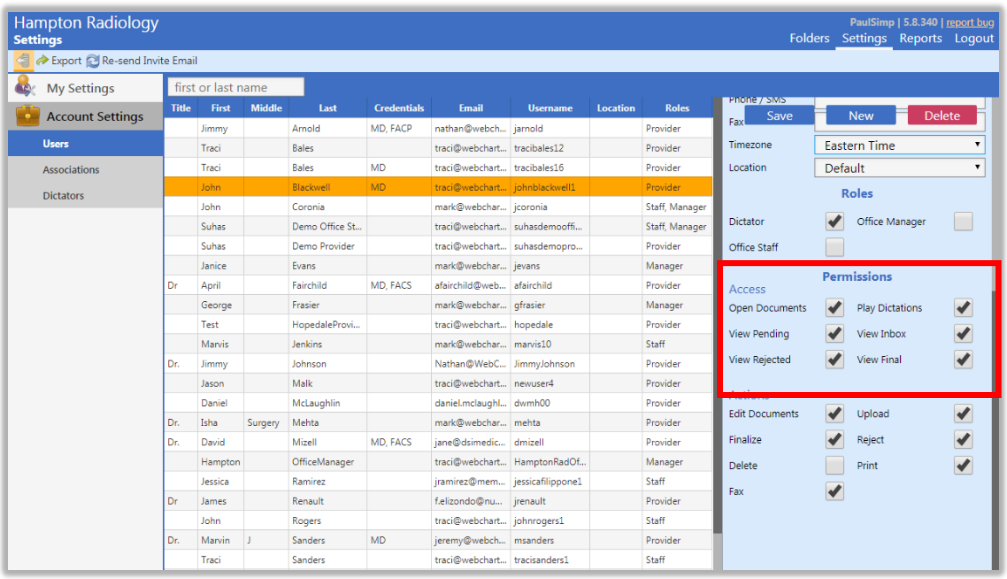
The “Permissions” section of the Details Panel is divided into four functional subsections, each of which deals with a specific part of the workflow:

- Access: Permissions contained within the Access section controls user access to certain functions of the workflow, such as accessing folders.

- Actions: Permissions contained within the Actions section controls certain actions users can take within the workflow. .

- Administrative: Permissions contained within the Administrative section control certain managerial/administrative tasks within the workflow.

- QA: Permissions contained within the QA section control certain QA controls the user can use in the workflow.



Actions

The "Actions" section controls eight different actions users can take within the workflow. Actions are:

- Edit Documents: This allows the user to edit transcriptions

- Route Dictations: This allows the user to route dictations manually to other users.

- Change Dictator: This allows the user to change a dictation or transcription from one Dictator's account to another Dictator's account.

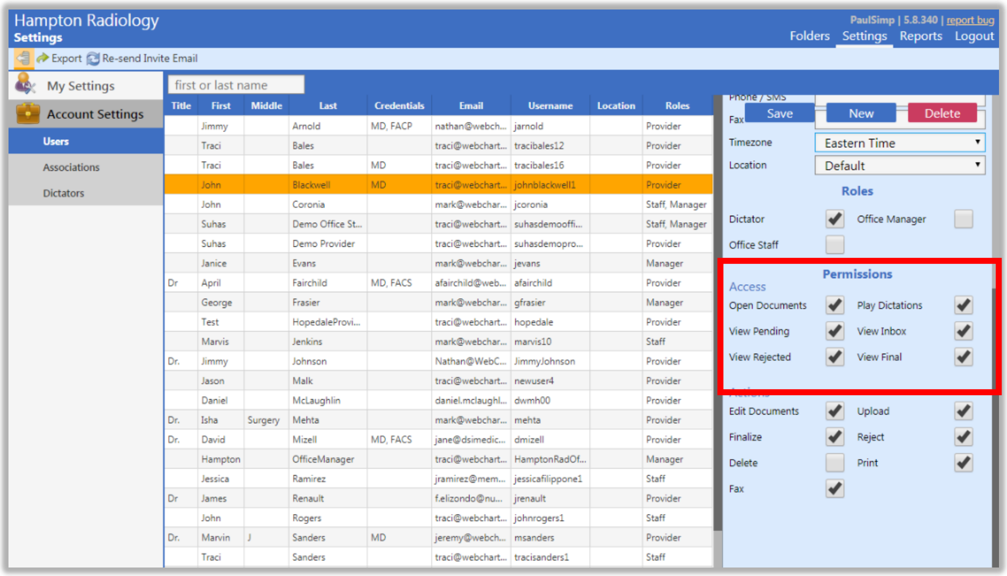
- Reject: This allows the user to reject dictations in the transcription workflow; to access the Rejected folder within the Folders view; and to edit and re-submit documents that have been rejected and are within the Rejected folder.

- Delete: This allows the user to delete dictations and transcriptions from the workflow.

- Print: This allows the user to print transcriptions.

- Fax: This allows the user to fax transcriptions.

- Edit Drafts: This allows the access the Draft folder within the Folders view, and to edit transcriptions within the Draft folder.



User Management

A number of functions related to Users are managed from the Users panel:

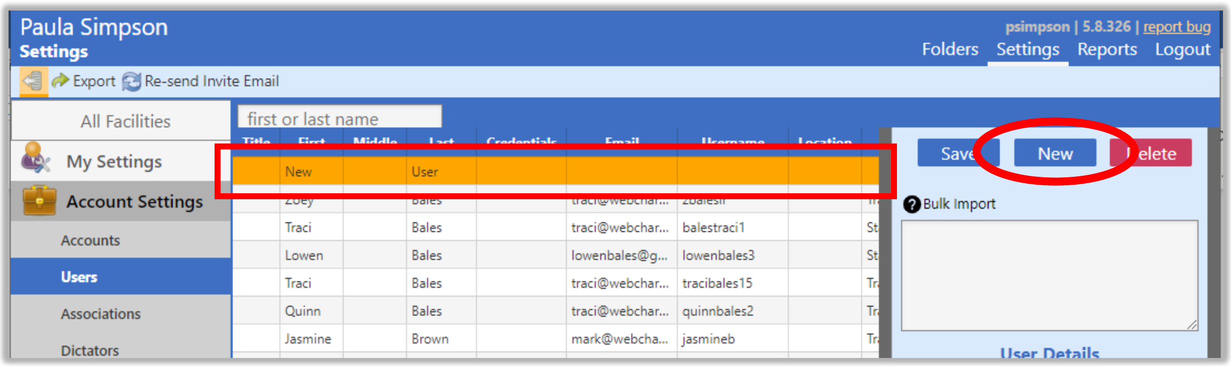
- Create User
- Edit User
- Delete User
- Bulk Create User (I think that bulk create should be part of "create" section, single and bulk create user, with bulk referencing to the section above for details.)

Create User

To create a new user:

1. Click the "New" button in the User Details panel. This creates a new blank row identified initially as "New User" at the top of the User Section (see below).

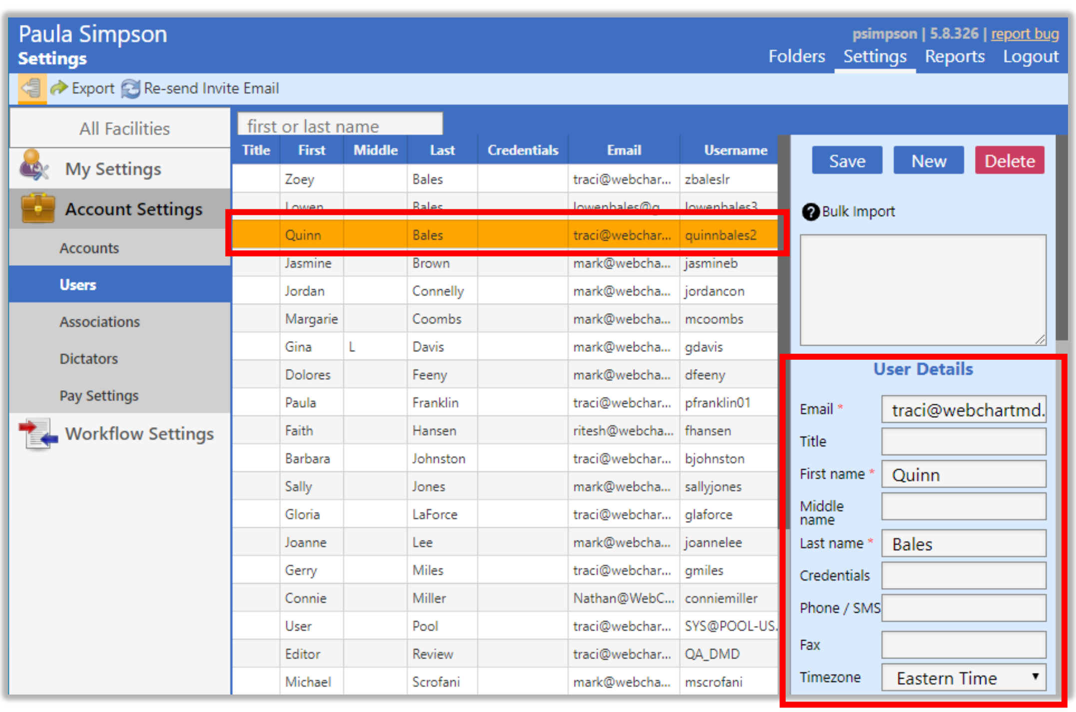
2. Add user identifiers and set Role and all permissions as described in the above "User Details" section.



Edit User

To edit an existing user:

1. Click the row of the user to be edited. Row highlights in gold.
2. The user's information and settings populate the User Details panel.
3. Make the required edits and click the "Save" button.

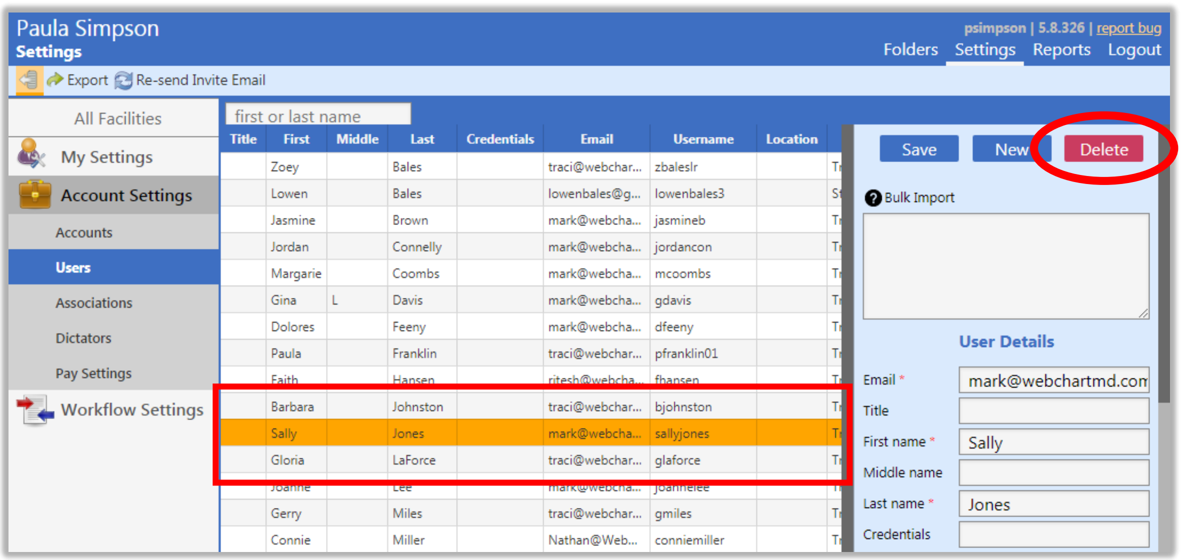


Delete User

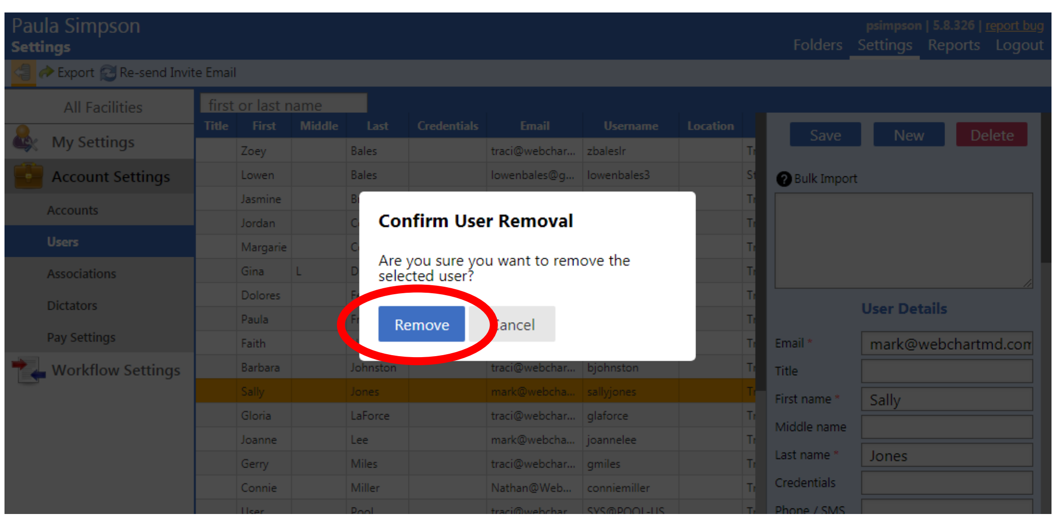
To delete a user:

1. Click the row of the user to be edited. Row highlights in gold.

2. Press the “Delete” button.



3. Clicking the “Delete” button creates a confirmation dialog box. Click “Remove” to confirm deletion.



Notes on Delete feature:

1. When Dictators are deleted, any dictations and transcriptions related to the Dictator are removed from screen but retained in the database. To purge dictations and transcriptions from WebChartMD, contact the helpdesk.

2. Users accidently deleted from an account can be restored. Contact the helpdesk for assistance.

Associations

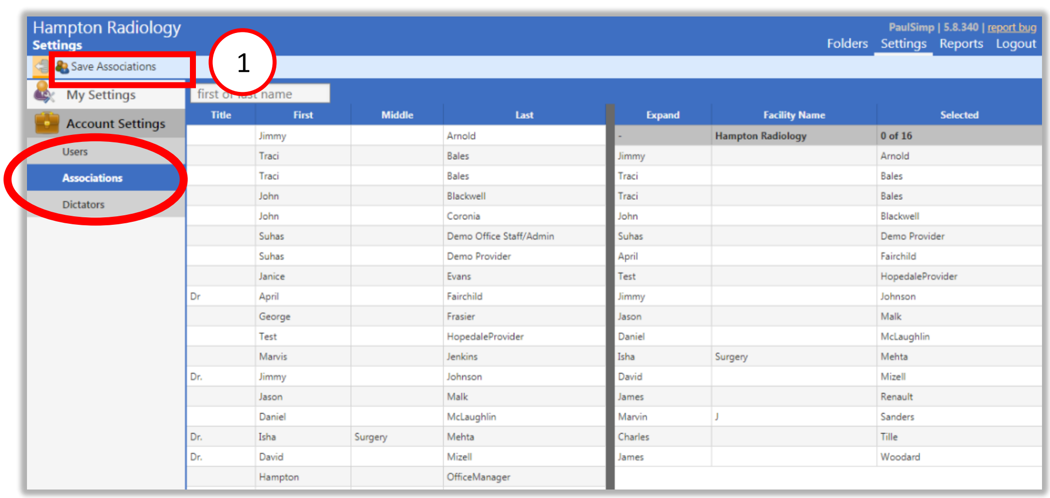
The Associations screen provides the Transcription Team member access to Folders of specific Dictators at Facilities. This feature is dependent on the user being given the “View Client Folders” permission setting in the User Details panel. If that permission is given, Facilities selected in the Associations view will be visible to the user in their Folders view.

The Associations setting decides which Dictators are visible to the user. Any dictator(s) or Facilities to which a user is not associated will not be visible to the user in the Folders view.

Notes on Associations:

1. Associations only affects visibility of Dictators in the Folders view. It has no bearing on the Transcriptionists being able to view Dictations in the transcription tool to transcribe them.

2. If a member of the Transcription Team is not associated with a Dictator, the Transcription Team member will be unable to access Transcriptions or Dictations for that Dictator in the Folders view.



Folder Management Function

The Associations area has only one folder management function button in the toolbar, “Save Associations”.

1 Save Associations: This function saves the changes made to the Associations. If the user navigates away to another page without clicking “Save Associations”, any changes that had been made will be lost.

Managing Associations

To create, manage and remove Associations between a Transcription Team member and a Facility and/or Dictator:

Step 1

Click on “Associations” in the Folder Pane under Account Settings. The screen displays two groups of users (see image above in previous section):

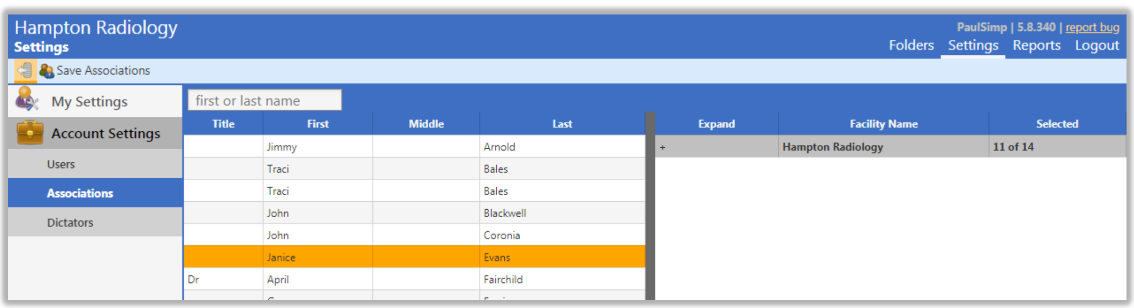
- The left side of the screen shows all Transcription Team members.
- The right side of the screen shows all Facilities and the Dictators at each Facility.

Note: While “All Facilities” is selected in the dropdown, the list on the right displays Dictators of all Facilities serviced by the Transcription Team. When a named Facility is selected in the dropdown, the list on the right displays on the named Facility and its Dictators.

Step 2

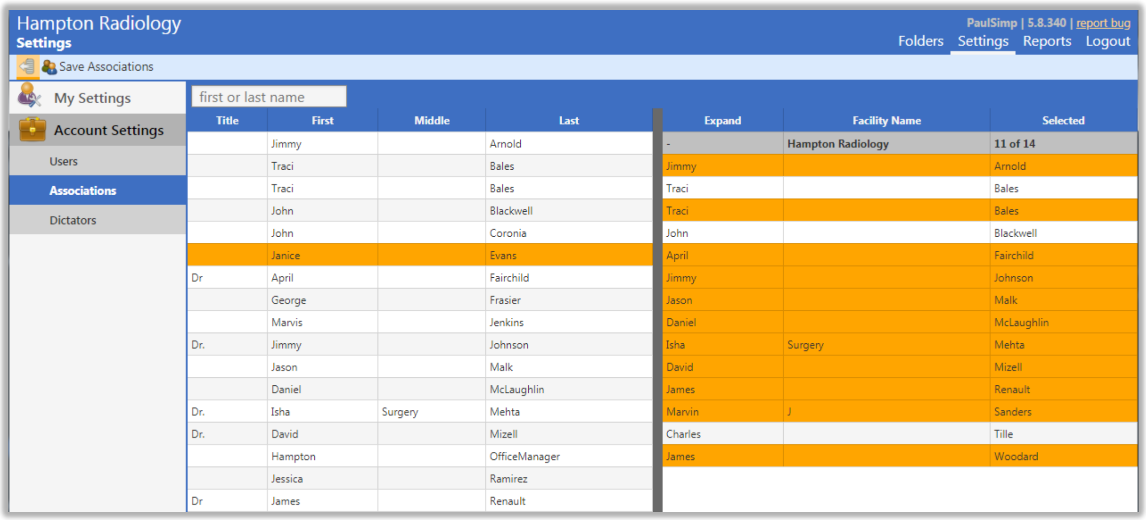
Select the Transcription Team user by clicking the name in the left side of the panel. Facilities the user is already associated with will display highlighted on the right side of the panel (see below).

Notes on Step 2:



- Clicking the “+” symbol to the left of the Facility name expands the Facility to display the Dictators at the Facility.
- The Facility name displays highlighted only if all Dictators are associated to the user. If the user is associated with all Dictators at the Facility, then the entire Facility name gets highlighted in gold and the “Selected” column displays the number as such.
- If all Dictators at the Facility are not associated, the Facility name remains gray, but the “Selected” column displays the number of Dictators associated with the user (as in example below, 11 of 14).

Step 3



Edit the existing associations by either adding or removing existing associations.

To Add a New Association

1. Ensure that the transcription team member's name is highlighted on the left side of the panel.

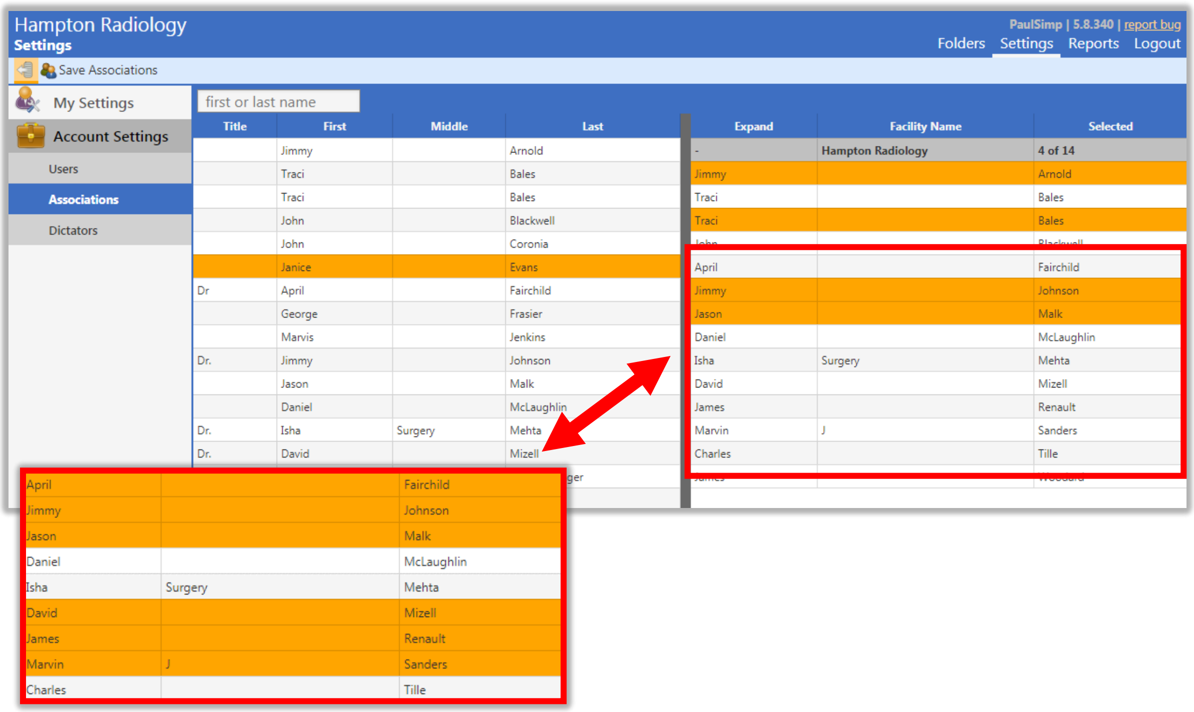
2. To associate the highlighted user with all Dictators at a Facility, hold down the Control key on the keyboard and click the Facility name to the right. This associates the Transcription Team member to all Dictators at the Facility.

3. To associate the user with single or multiple Dictators at a Facility, click the "+" symbol to expand the selection, and click on only the Dictator names required to be associated. Once clicked, selections will become highlighted.

Remove Existing Association

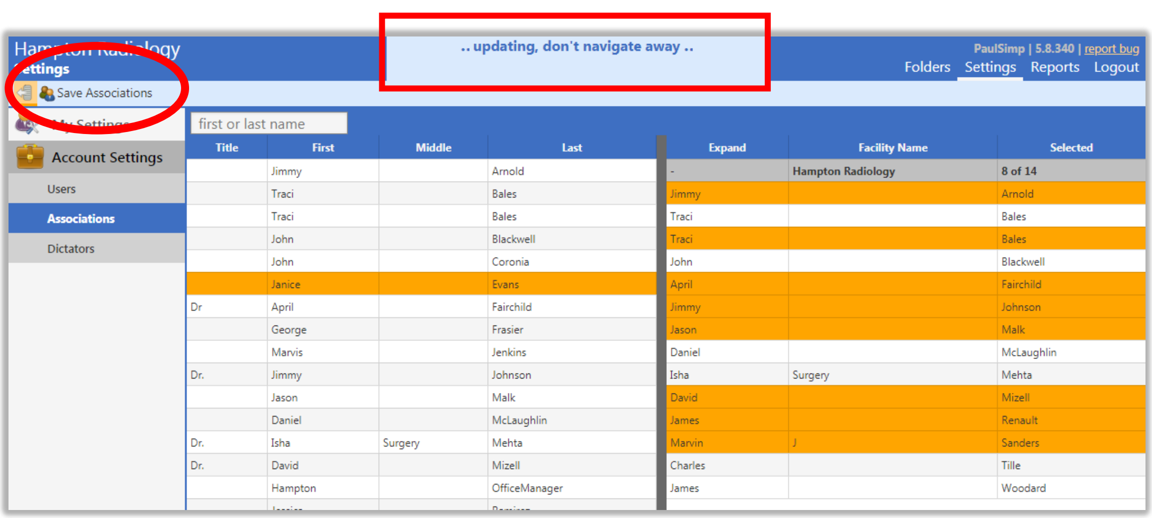
1. Ensure that the transcription team member's name is highlighted on the left side of the panel.

2. Hold down the Control key and click Facility name (or Dictator name(s) in the expanded view). The highlight color will remove, and the "Selected" column updates the number of selected Dictators.



Step 4

After adding or removing Associations, click the “Save Associations” button in the toolbar to commit new settings. Wait until the “Updating, don’t navigate away” message at the top of the screen disappears before leaving the screen (see below).



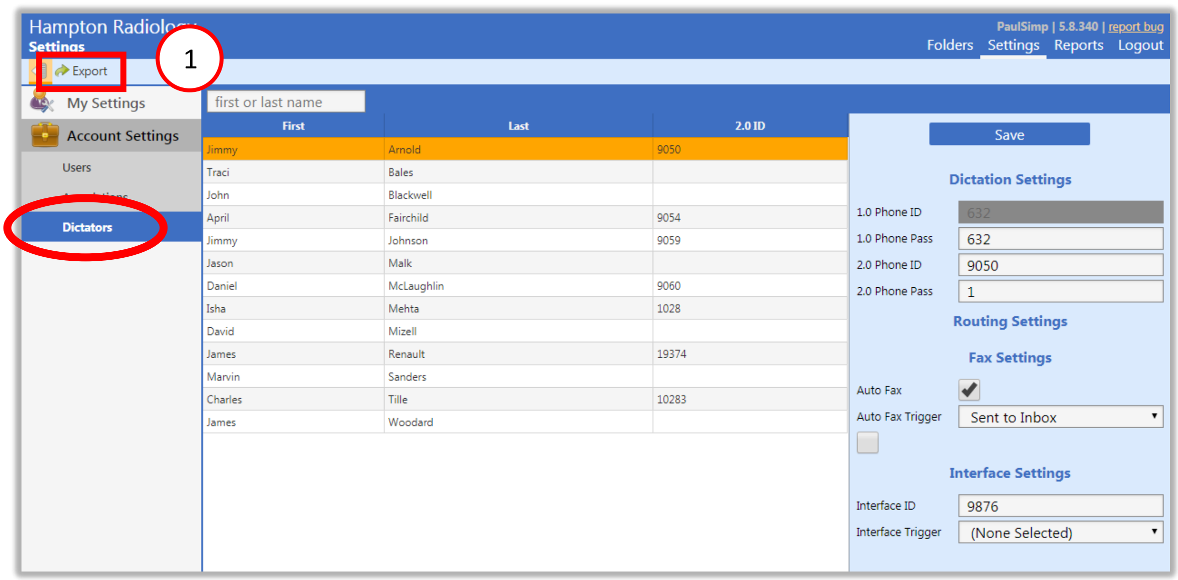
Dictators

This section provides workflow settings that can be customized for each Dictator.

Folder Management Functions

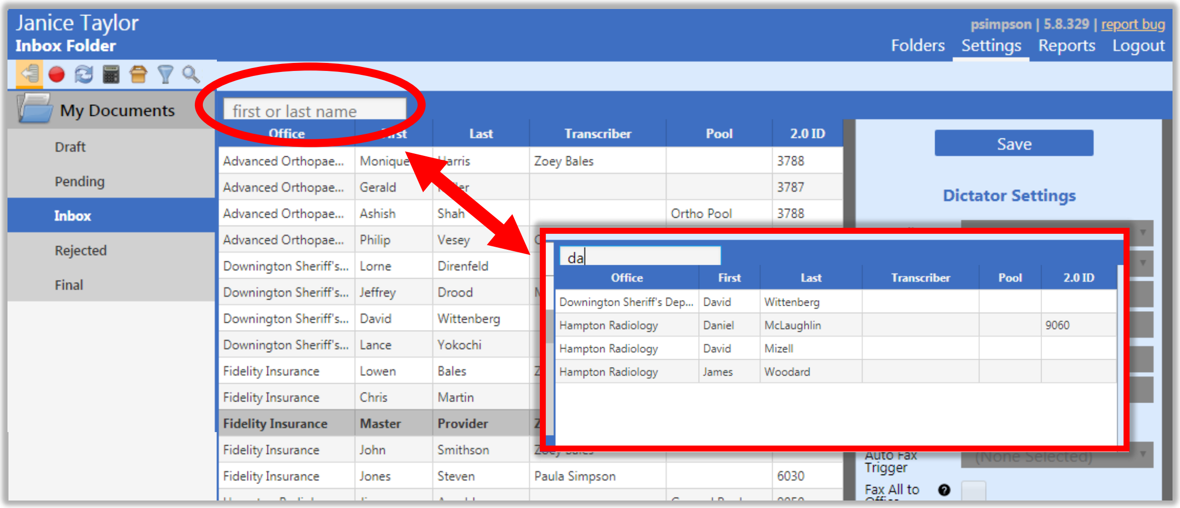
The Dictators area has only one folder management function button in the toolbar, “Export”.

1 Export: This exports the list of Dictators at all Facilities as an excel file. Pressing the “Export” button exports the excel file to the Downloads folder on the user’s computer. For additional details see page 85.



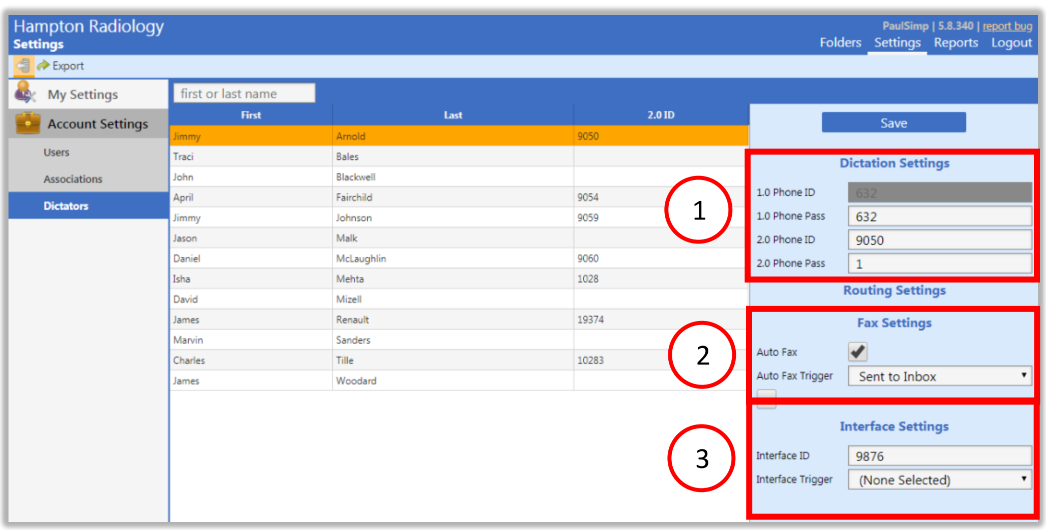
Search Feature

The Search field in the top-left corner of the User Details Section allows for quick searching on Dictators by entering part or all of the first or last name (see below).



Managing Dictator Settings

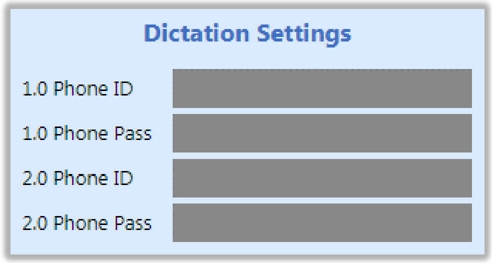
The Dictator settings found in the Details Panel can be divided into five sections:



1 Dictation Setup

This section manages the Dictator's telephone dictation user IDs and Passcodes (when two-factor user authentication is used). WebChartMD offers two call-in dictation versions:

- Standard Phone Dictation System
- Custom Phone Dictation System



Standard Phone Dictation System

Key features of the standard phone dictation are:

- pre-configured set of keypad presses and workflow.

- Two-factor authentication.
    - The first factor is the Dictator's "Phone ID", and this is pre-set by the system. The Phone ID of the Dictator is assigned by the system at the time of creating their account under Users screen. This pre-assigned number is contained in the greyed out box and cannot be changed.
    - The second factor is the Dictator's "Phone Pass", or passcode, and this factor can be configured. The passcode field is used to create a numeric passcode for the Dictator. The passcode can be up to seven digits in length. The default value of "-1" in the passcode is system generated at the time of user account creation so that it cannot authenticate on the phone line and acts as a disable/not in use method.

- The default call-in number for the standard phone system is our toll-free line, 1-877-864-8844, with a backup number of 1-877-206-1761 assigned to the 1.0 system. However, local call-in numbers can also be assigned to the standard phone system if required.
- The standard phone system has a fixed keypad configuration as follows:

KEYPAD COMMANDS

1 – RECORD/UNPAUSE		2 – PAUSE	
3 – REWIND 5 SECONDS		4 – REWIND BEGINNING	
5 – NEW FILE		6 – FAST PLAY	
7 – SKIP TO END		8 – JOB NUMBER	
9 – STAT	1 hr: 9/1 8 hr: 9/8	2 hr: 9/2 12 hr: 9/12	4 hr: 9/4

- The top-of-call workflow consists of the following prompts / dialogue:

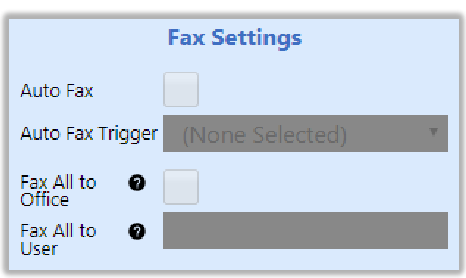
- "Welcome to WebChartMD"
- "Please enter your user ID followed by the pound sign"
- "Please enter your passcode followed by the pound sign"
- "Begin speaking at the tone"

Custom Phone Dictation System

Key features of the custom phone dictation system are:

- Keypad presses, user IDs and top-of-call workflow are customizable to emulate/mimic client's existing telephone systems.
-
- One factor or two factor authentication is available. IDs and/or passcodes can be up to seven digits in length.
- Top-of-call customizations can any combination of the following in any order:
    - Dictator ID
    - Patient identifier (MRN, ID number, etc.)
    - Location ID
    - Work type
    - Date of birth
    - Date of service
    - Encounter ID
- Command prompts can be custom recorded or existing command prompts can be imported.
- Presence of background tone during record mode can be enabled/disabled.
- Terminator key (#) can be enabled/disabled.
- Announcement of Job ID played at end of dictation can be enabled/disabled.
- "Append" or "over-write" modes can be used for recording.
    - "Append" means that any newly recorded dictation is placed at the end of the audio file.
    - "Over-write" means that any newly recorded dictation is placed at the current position in the file.

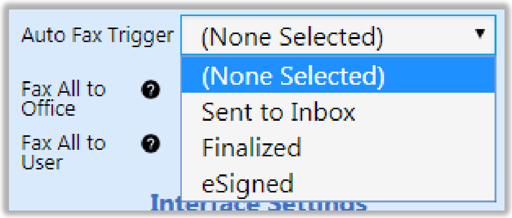
Fax Settings



This section of the Details Panel consists of four settings.

- Auto Fax: When checked, the system will automatically fax completed transcriptions based on the Auto Fax Trigger (below).

- Auto Fax Trigger: This dropdown menu contains three options based on the workflow status of the document (for more information on Statuses, see page 68).

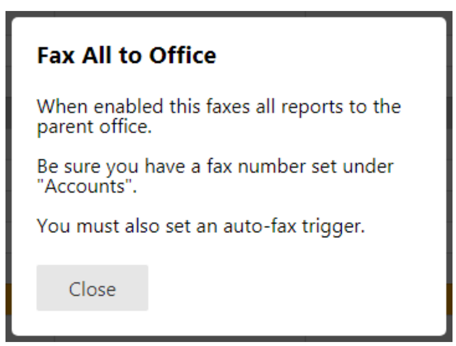


  - Sent to Inbox: This condition is met when a transcription is submitted to the Dictator's Inbox folder.

  - Finalized: This condition is met when the transcription is sent to the Final folder.

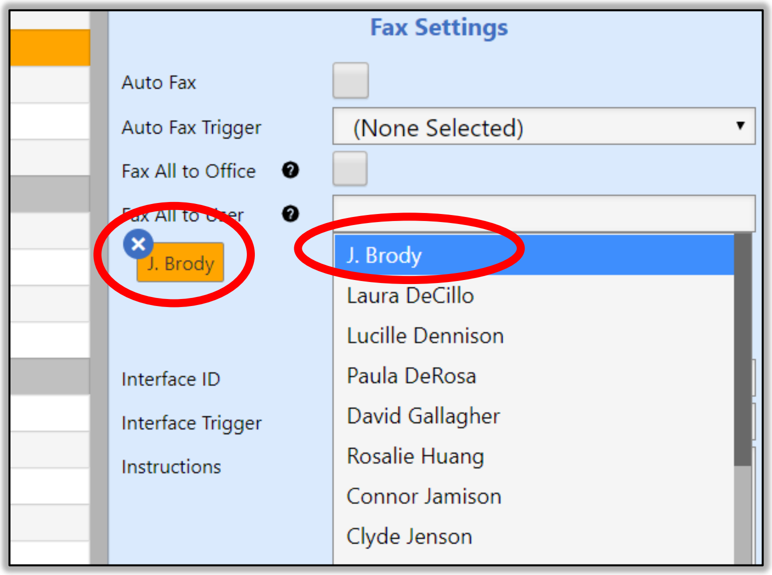
  - eSigned: This condition is met when the transcription has been eSigned by the Dictator. Re-esigning a transcription does not retrigger the auto faxing.

- Fax All to Office: When checked, a copy of all transcriptions for this specific Dictator are faxed to their Dictator's office fax number in the Address Book.



- Fax All to User: In some cases, Dictators want copies of their transcriptions to be auto-faxed to other Dictators at their Facility, which is capable via this feature. The dropdown lists all other Dictators at the same Facility as the Selected Dictator.

  To set a single or multiple Dictator to automatically receive faxed copies of transcriptions, click the dropdown and select the Dictator. Once selected, the recipient Dictator's name appears as a "tag" adjacent to the dropdown (see below). To remove a selected recipient Dictator, click the "x" in the top-left corner of the tag.

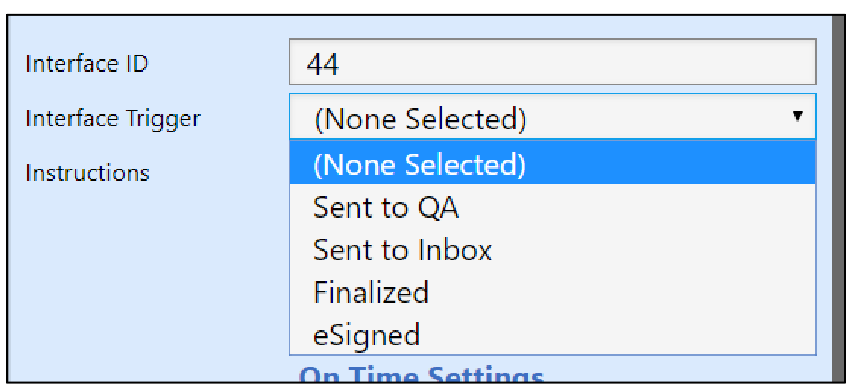


Interface Settings

This section manages specific aspects of the workflow when an interface into an electronic medical record system is in use. Settings available in this section are:

- Interface ID: This field contains the ID used by the electronic medical record system to identify the selected Dictator. For more details on Interface setups, please contact the WebChartMD Helpdesk.

- Interface Trigger: This field defines the trigger, or when the transcription will interface into the electronic medical system. Trigger options are:



<u>Sent to QA:</u> transcriptions interface when sent to QA.

<u>Sent to Inbox:</u> transcriptions interface when sent to the Dictator's Inbox.

Finalized: transcriptions interface when moved from the Inbox to the Final folder.

ESigned: transcriptions interface when e-signed by the Dictator in his/her WebChartMD workflow.

For more details on Interface setups, please contact the WebChartMD Helpdesk for more information.

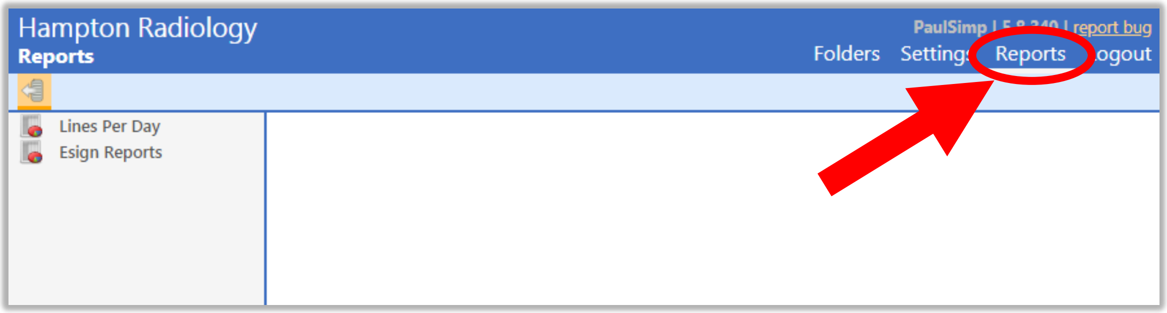
- Instructions: This is a free text box used for any notes or special instructions the Facility wishes to keep on file related to the Dictator's settings.

Please contact WebChartMD Support team at support@webchartmd.com for further details on the use of the Interface Settings.

Reports View

Reports

The Reports area is the third functional area within the WebChartMD platform, as shown in the top-right corner of the user's online account (see below).



Premade Reports

Lines Per Day – This report can be run by the Dictator and will show the total number of lines transcribed (by day) for a given time frame.

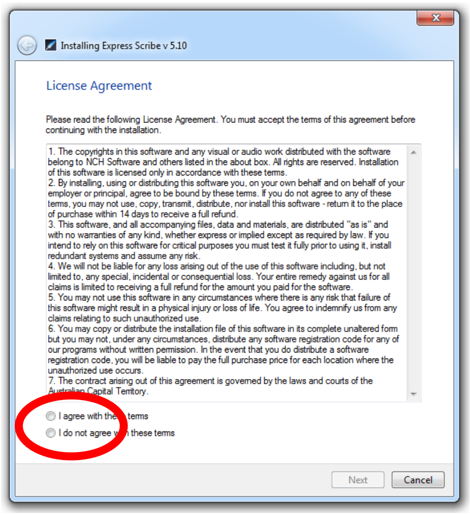
Esigned Reports – This report will give the total number of reports the Dictators have eSigned (by day) for a given period of time (by finished date)

Appendix 1: Express Scribe

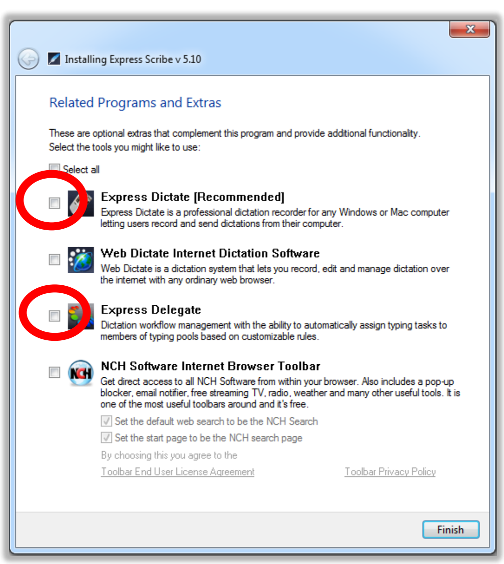
The Express Scribe version 5.10 can be downloaded from our Downloads page at www.webchartmd.com/downloads. It is listed as ‘Express Scribe Setup’.

This version of Express Scribe can play the dss, mp3, wma and wav formats but is incompatible with .ds2 format. It can be installed on Windows 7, Windows 8 and Windows 10 machines.

For Windows 7 users:
Double-click the 'Express Scribe Setup' link from the downloads page. Then, accept the License Terms on the license Agreement window, then click next.



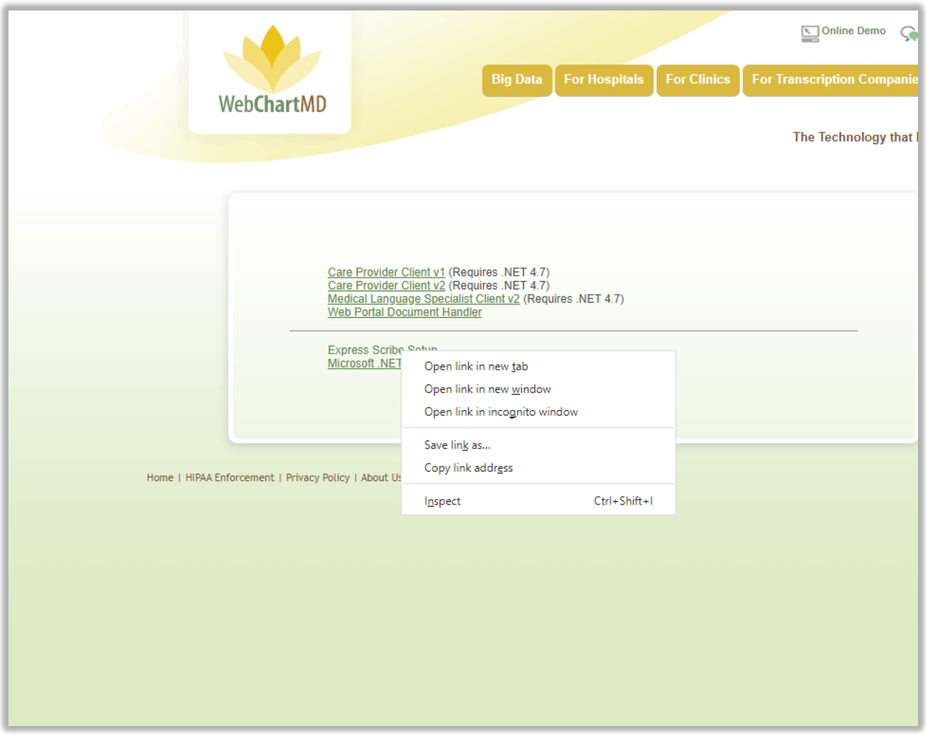
The next page has several extra software options that NCH would like the user to try out and bundles them along with Express Scribe.



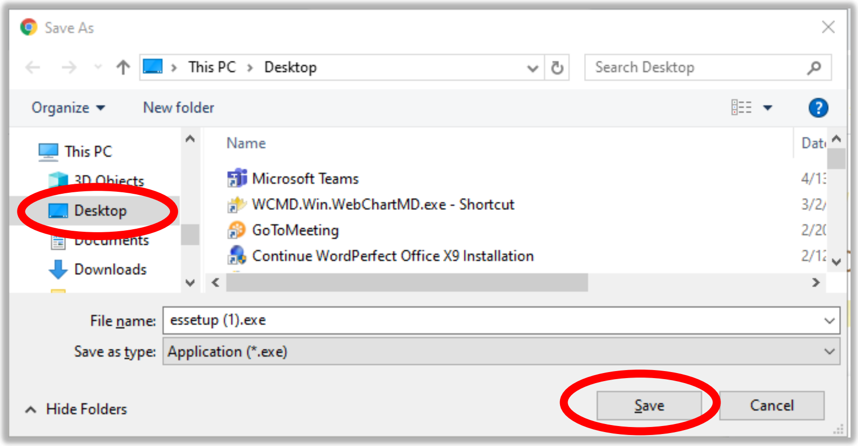
None of these options are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

<u>For Windows 8/10 only</u>:
Express Scribe 5.10 is only compatible with Windows 7 and hence needs to be run in compatibility mode for Windows 8/10 installation. **This step is not needed for Windows 7 installation**.

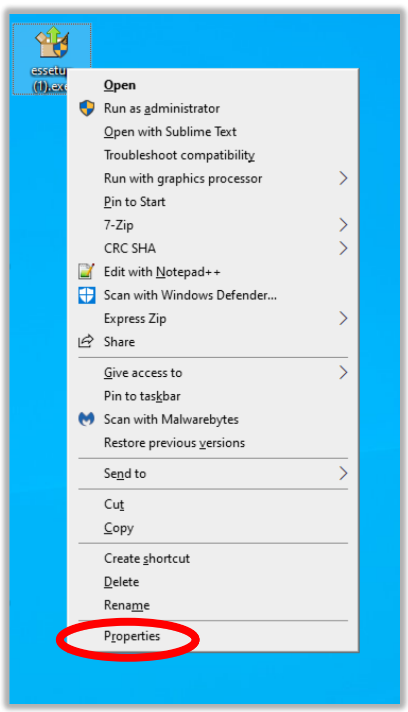
First the user needs to save the download to their desktop. To save the installer on the desktop, the user can right-click the 'Express Scribe Setup' link on the downloads page. Then click 'Save link as'.



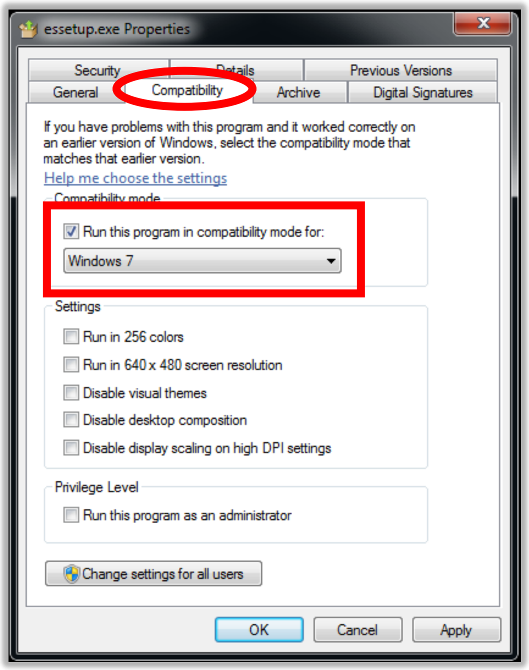
When the user clicks 'Save link as' they will be presented with a 'Save As' window. From here the user will need to save the download to their desktop.



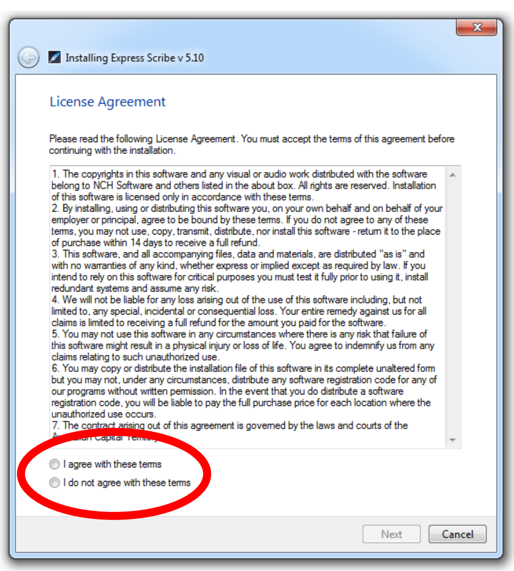
To set the Installation in Compatibility Mode on Windows 8 and 10, user needs to go to the Properties of the downloaded essetup.exe. To do so, right-click the installer and go to 'Properties' at the bottom of the window presented



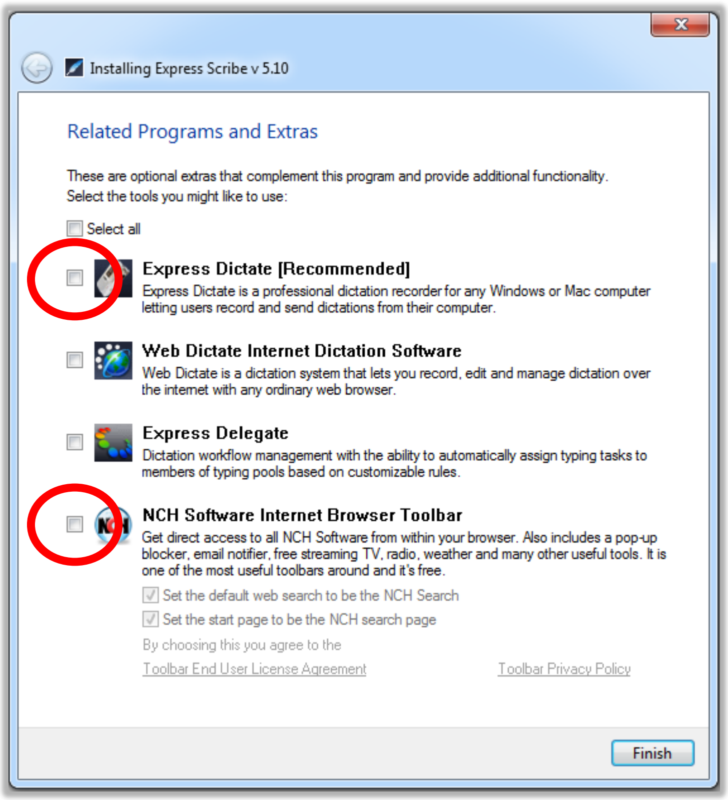
Once the Properties window opens, navigate to the Compatibility tab at the top, then look for the Compatibility Mode section. Check the checkbox that says, "Run the program in compatibility mode for" and then select 'Windows 7' and then click OK.



To install Express Scribe, the user double clicks on the essetup.exe installation file. This brings up the License Agreement which can be agreed upon. Click Next.

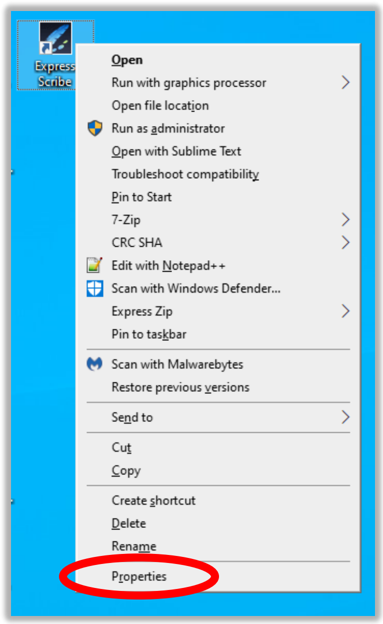


The next page has several extra options that NCH would like the user to try out and bundles them along with Express Scribe. However, none of these are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

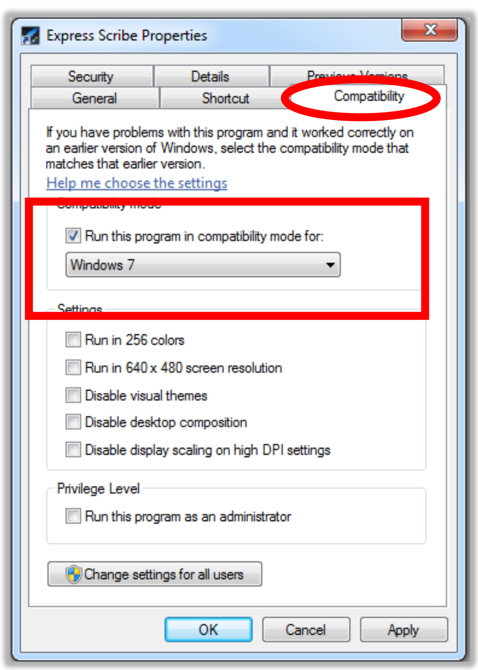


Once ‘Finish’ has been selected the shortcut for Express Scribe will be on the desktop. On Windows 7 the user can proceed to the next steps and setup their foot pedal (see below). However, on Windows 8 and 10, this may create two NCH Software windows to be presented automatically. Those two windows and their accompanying browser windows can be OK’d and/or closed.

Next the user will want to place Express Scribe in compatibility mode. To do this, the user right clicks on the Express Scribe shortcut and goes to Properties.



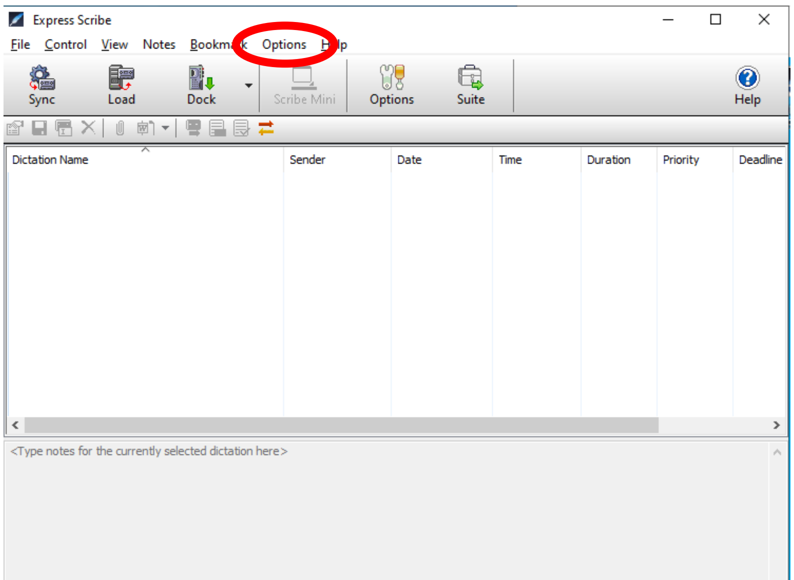
Again, just like before, the user sets the compatibility mode to Windows 7 under the Compatibility tab and clicks OK



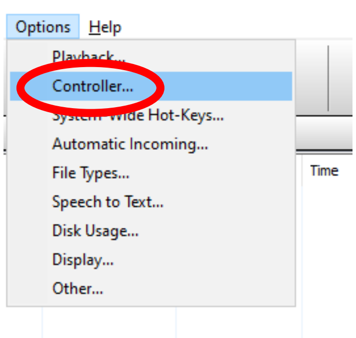
Once compatibility has been set, express scribe is installed and ready to be used.

Setting Up Food Pedal:

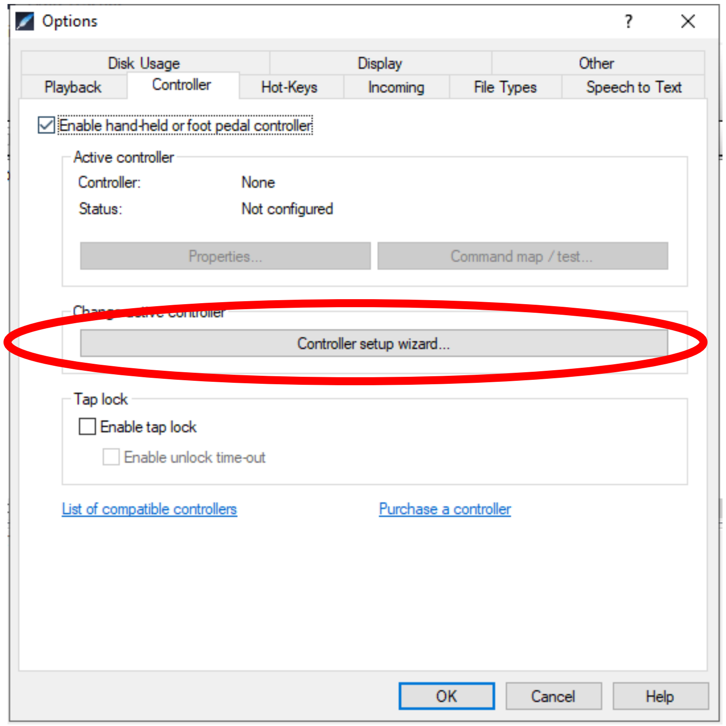
To set up the foot pedal, the user will go into the 'Options' tab in express scribe



In the 'Options' tab you'll want to go to 'Controller'



In the 'Controller' window, the user will then want to click the 'Controller setup wizard'



The user will then be guided through a setup wizard where the foot pedal will be selected and set up. Once the wizard is complete the foot pedal will be configured and usable through express scribe.