

User Manual

Facility Healthcare Provider Version

Revised May 11, 2020

Prepared by:

WebChartMD Johnson City, TN 37602



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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.

<u>Dictator</u>: A user that authors the voice files, referred to in this manual as the Healthcare Provider.

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

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

<u>DocHandler</u>: 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.

<u>File</u>: 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".

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

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

<u>Transcription Team</u>: 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 <u>www.webchartmd.org</u>. 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.



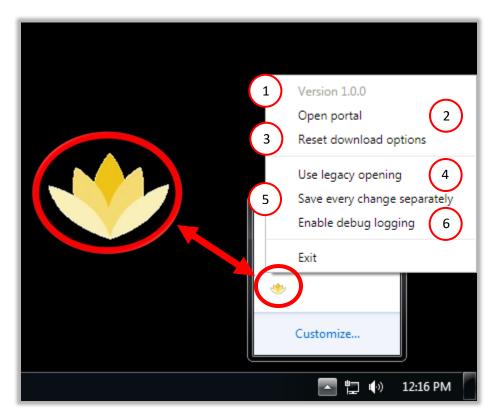
Once the download is complete, click the downloaded file to install it.

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 46) resetting both the file naming convention and preferred download location as set by the user.
 - 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.



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

Initial View When Logging In

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Draft	=	35409549	0		Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-:
Pending	=	34489188	۰		Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-
	=	32433425			Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	мо
Inbox	=	32433402			Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	112

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Name

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

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.

Username

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

Version Number

The Version Number is displayed next to the username.

Report Bug

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

Log out Button

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

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7 System Functional Areas (Views)

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

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filter	≡	34877483						Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	1.57	Dennis	Aram
	=	34588085						Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	20 11:57	Simi	Abra
Hampton Radiology	=												

- **The Folders view** displays the folders in which the dictation and transcriptions are accessed. transcriptions. More details can be found on page 13.
- **The Settings view** accesses the various workflow settings used by the Transcription Team and healthcare Facilities. More details can be found on page 81.
- The Reports view displays the Reporting suite. More details can be found on page 87.



Folders View

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Folder View Overview

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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:

My Documents		DID					Dictated	Uploaded	Case Info	First	Last	
,	=	35409549	0		 	Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	υ
Draft	=	34489188	•			Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	U
Pending	=	32433425				Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	N
^{In} 2	=	32433402				Taylor, Janice	09/2 3	04/11/17 17:35	08/15/17 16:02	Min	Chan	1
Re	=	32433399				Taylor, Janice	09/22/1	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	1
Final	=	30230278	•	۰		Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	4
	=	30230244	0	•		Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	4

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.

Folder Pane: Displays all folders used in the workflow.

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 seven icons from the left are always constant for all users across all folders. These are:

Janice Taylor Inbox Folder								Fo			3.340 <u>repo</u> ports Lo	
🗐 \varTheta 🗃 🖀 🖗 🍳	Search	Open (📇 Print 🕯	🚽 Fin	alize (🚫 Reject 🙈 Cł	nange Dictator 💧	🔒 eSign 濡 Fax	🐻 Case Info	8	🕜 🖓 1	yr2yr <mark>A</mark>
My Documents		DID	6 2	21		Dictator	Dictated	Uploaded	Finished 1	° ,ŧ	Last	ID
Draft	=	35, 09-				Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-19
Pending	=	34489188				Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-28
	=	324	.0		~							MO-9
Inbox	=	324				63	1	- 7	્યૂટ	Sear	rch	1122:
Rejected	=	324	·			~			ġ.			1122:
Final	≡	30230278		1	2	1 3 ice	5 20:1	6/16	3/15/16 11:54		Brown	40200
	≡	30230244	Ŀ	J	2	3 Ice	4 , 17:5	5 6	3/07/16 12:09	Ľ	Manning	4029:

- 1 **Pin Sidebar** This toggle button shows or hides the folder pane containing folders below the All Facilities column.
 - **Dictate** This allows the Healthcare Provider to make recordings from the Portal. More details on this feature can be found on page 58.
 - **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.
- 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.
 - **Sort By** Groups the dictations based on selected criteria such as a specific date or a Healthcare Provider.
 - **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.
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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.

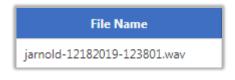
Clicking the "Search" button in the toolbar opens the "Filter Criteria" search fields.



Fields requiring explanation:

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- 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:



"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.

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:

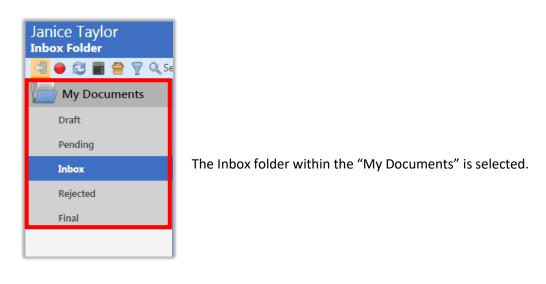
- The shorter the time interval selected, the faster the folder's content will load.
- All transcriptions regardless of the date are always available for access on the system by using the Search feature.

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.

Folders

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

My Documents: 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 18.





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.

POOL	Jamoid-11202					
Pool	jarnold-11262					
Pool	jarnold-11262					
Pool	jarnold-11262					
Pool	jarnold-11262	$\mathbf{\nabla}$	Limit:	100	next	1
_						

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.



My Documents

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:

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My Documents	≡	DID	G	-	2	٦	A	Dictator	Dictated	Uploaded	Finished V	First	Last	1
Draft	=	35409549	0					Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-
Pending	=	34489188	•					Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-
	=	32433425						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	мо
Inbox	=	32433402						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	112
Rejected	=	32433399						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	112
Final	=	30230278	•	•				Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	402
	=	30230244	•	•				Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	402

<u>Draft</u>: This displays the Draft folder 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.

<u>Rejected</u>: 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.

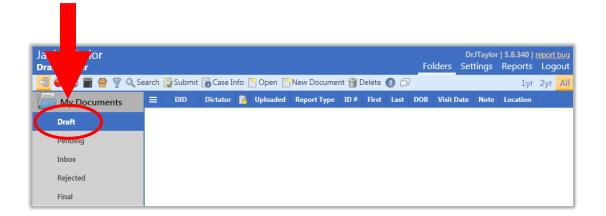


Draft

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The Draft folder holds all the documents that are created by the Healthcare Provider directly into Portal.



Folder Management Functions

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

Janice Taylor Draft Folder		2	4		Fo			5.8.340) Reports	_,
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Draft			ソ	5					
Pending									
Inbox									
Rejected									
Final									

Submit: Submit is used to move the audio to the next step in the workflow, which in almost all cases will be to submit a completed transcription from the Draft and into the Healthcare Provider's Pending folder.

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.

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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.

Janice Taylor Draft Folder							Folders		r 5.8.340 <u>r</u> Reports	
🧐 🔴 😂 📓 🚔 🍸 🔍 Se	earch 🕓	Change TA	AT 🚑 Change	Dictator 🐻 Case	e Info 📑 New D	ocument 闠 D	elete 🕜 ¢	5	1yr	2yr All
My Documents	Case I	nfo								
Draft	Search	h Patient				Visit Date				
		First				Last				
Pending		DOB				ID #				
Inbox	Rep	ort Type			~	Note				
Rejected	Billi	ng Code				Location	Default		~	
Final	Upo	date Case	Close							
	≡	DID	Dictator	Uploaded 🔻	Dictated	File Name	Length	TAT	Report Type	ID # 1
	Total	#1	-	-	-	-	0:01:07	-	-	
	=	35574750	Taylor, Janice	06/03/20 12:45	06/03/20 12:45	DrJTaylor-060	0:01:07	Standard		

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 8 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):

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Draft	=	32433425				Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	МС
Pending	=	32433399				Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	112
5	≡	32433402				Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	112
Inbox	=	30230244		0		Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	402
Rejected	=	30230278	0	0		Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	402
Final	≡	34489188	0			Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA
	=	35409549	•			Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-

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.

Janice Taylor Draft Folder										F			3.340 <u>repo</u> ports Lo	
🚄 👄 😂 📓 🚔 🚏 🔍 Search 📔 Open 🚐 Print 🔯 Finalize 🚫 Reject 🍇 Change Dictator 🔒 eSign 🚍 Fax 🐻 Case Info 🎁 Delete 👔 🗇 🛭 1yr2yr														
My Documents	=	DID	G	-	2	٢	2	Dictator	Dictated 🔺	Uploaded	Finished	First	Last	п
Draft	Ξ	32433425						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	MO-
Danding	=	32433399						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	1122
Pending	≡	32433402						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	1122
Inbox	=	30230244	0	•				Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	4029
Rejected	≡	30230278	0	0				Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	4020
Final	≡	34489188	•					Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-2
	≡	35409549	0					Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-1

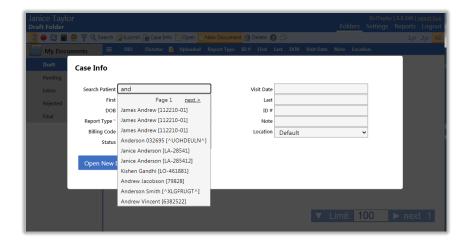
4

New Document: This feature allows the Provider to create a new document directly into the Portal. Clicking on the "New Document" button opens a new box:



Case Info				
Search Patient 3 First DOB 7 Type * Billing Code 11 Status		1 5 • 9 •	Visit Date 4 Last ID # 8 Note Location Default	2 6 10
Open New Document	Cancel			

1 Search Patient:



The search field uses full or partial names (at least three characters) for both first and last names. The search displays a list of patient names. This list of patients can be spread to multiple pages and can be accessed with the "next >" and "< prev" links at the top.

Selecting the patient adds all the relevant information into the fields such as First, Last, ID# and DOB.



Search Patient			
And			
	Page 1	<u>next ></u>	
James Andrew	[112210-01]		
James Andrew	[112210-01]		
James Andrew	[112210-01]		
Anderson 0326	95 [^UOHDEUL	.N^]	
Janice Anderso	n [LA-28541]		
Janice Anderso	n [LA-285412]		
Kishen Gandhi	[LO-461881]		
Andrew Jacobs	on [79828]		
Anderson Smith	h [^XLGFRUGT/	`]	
Andrew Vincen	t [6382522]		

2

4

5

Search Patient										
and										
< prev	Page 2									
Smith Anderson	[^KFJYUYKB^]									
Andrew Johnsto	Andrew Johnston [^WNJZXSTM^]									

Visit Date: The patient' date of visit can be added by clicking in the Visit Date field. This provides with a calendar popup which can be clicked into or the user can type the date directly into the field.

											Fold				
		🚽 Submit [🖥 Case Ir			Document 👸 Dele	ete 🕜								
My Docu	ments 📃	DID I	Dictator		Uploaded	Report Type	ID	# 1	First	Last	DOB	Visit D)ate	Note	
Draft	Case Info														
Pending															
inbox	Search Patient					Visit	Date	03/0	1/2020						
Rejected	First						Las		Marc	h		20	020		
	DOB						ID #	Mar	ch		∨ 20	20		~	
Final	Report Type *				~		Note	Pr	evious N	Month		Next	Month	h	
	Billing Code					Loc	atior	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	Status	Draft			~			1	2	3	4	5	6	Sat 7	
	Open New [)ocumont	C	ancel				8	9	10	11	12	13	14	
	Open New L	ocument		ancer				15	16	17	18	19	20	21	
								22	23	24	25	26	27	28	
								29	30	31				4	

- 3 First: This contains the first name of the patient.
 - Last: This contains the first name of the patient.
 - DOB: This contains the Date of birth of the patient.

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6 ID #: This contains the MRN or identification number of the patient.

Janice Tayl Draft Folder	or						Folders			10 <u>report bug</u> rts Logout
	🛉 👕 🔍 Search 🕻	🚽 Submit 🐻 Case In	fo 📑 Open 📑 Nev	w Document 🎁 Delete	0 🗗					Lyr 2yr All
My Doc	uments 📃	DID Dictator	Deloaded	Report Type	ID # F	irst Last	DOB V	isit Date	Note	Location
Draft	Case Info									
Pending										
Inbox	Search Patient	and		Visit Da	te					
Rejected	First	Andrew		Li	st Jacob	son				
Final	DOB	04/22/1956		IC	# 79828	6				
Fillar	Report Type *		~	No	te					
	Billing Code			Locati	Defa	ult		~		
	Status	Draft	~							
	Open New E	Document Ca	ancel							

Report Type: The "Report Type" dropdown provides a list of all templates in the system for the Healthcare Provider. A template can be preselected

Report Type
~
[Vista Deve - J. Taylor] Behavior Modification Note
[Vista Deve - J. Taylor] Early Intervention Screening Note
[Vista Deve - J. Taylor] Occ Therapy Consult
[Vista Deve - J. Taylor] Psych Eval
[Vista Deve - J. Taylor] Title XIX Form
[Vista Developme] Family Letter
[Vista Developme] Nursing Health Assessment

Note: This is a free text field that allows the Healthcare Provider to add notes along with the dictation.

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.

Location: For facilities using multiple locations.

7

8

9

10



Status: This dropdown menu contains three options. The Healthcare Provider can select the initial folder where the new document gets created.

11

Case Info	
Search Patient	
First	
DOB	
Report Type *	~
Billing Code	
Status	Draft 🗸
	Draft
Open New [Inbox
	Final

Clicking on the "Open New Document" button launches a Word document with the template loaded into it. The Healthcare Provider can then type the information and close Word. Closing word would ask if the Healthcare Provider wants to save the changes. Clicking "Save" would save the changes into Word and the new document gets created at the target folder chosen in Status.

Clicking "Cancel" stops the new document creation process and returns the user to the Portal.

5 Delete: This function allows the user to delete a dictation or transcription. "Delete" is a permission-based feature. Please speak with the Facility Administrator for more information on the Permissions.

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.

Janice Taylor Draft Folder					_		Fol			5.8.340 <u>re</u>p Reports l	
🚰 👄 🔁 🗑 音 🍸 Q.s	🕞 Submit	Ca			v Document 🕤	Delete 🕜 🗇					yr All
My Documents					or Dictate	oploaded					Encount
Draft	32433425		Carl				09/26/17 17:31	Jessica			
Pending				irm Del	etion		08/15/17 13:40				
Inbox	32433402		Delete	reason.			08/15/17 16:02		Chan		
	30230244	•					03/07/16 12:09	Carta	Manning	4029246	
Rejected	30230278	0 (03/15/16 11:54	Terry		402009	
Final		•					06/05/19 12:12	Janice	Anderson		
	35409549	•				/	03/18/20 14:04	Jessica		LA-19283	
			Del	lete	Cancel						



Columns

All available columns viewable in the Rejected and their descriptions can be found starting on page 37.

Column Management

See page 41 for a full description of column management features.

File Display

The File Display section displays the documents that are created by the Healthcare Provider within the Drafts folder.

File Action Menu

All available "File Action Menu" options viewable in the Drafts and their descriptions can be found starting on page 45.



Pending

1

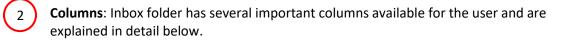
3

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.



The Pending folder consists of three important areas:

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.



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



Folder Management Functions

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

Janice Taylor Pending Folder	arch 📢	1 Change TA	AT 🔐 Change	Dictator		locument 🚔 Del		_	DrJTayle ers Settings		oorts		ut
My Documents		DID	Dict	Uploaded V	Dictate	File Name	Length	TAT	Report Type	ID #	First	Last	1
Draft	Total	# 1	- 2		- 4)	0:01:07	-	-	-	-	-	-
Pending	≡	35574750	Taylor, Janice	06/03/20 12:45	06/03/20 12:45	DrJTaylor-060	0:01:07	Standard					
Inbox													
Rejected													
Final													

1) Change TAT: This feature also allows the user to change the turn-around time, or TAT, assigned to a dictation.

By default, dictations uploaded into the database receive a standard TAT.

STAT times available are Standard, 1 hour, (1hr), 2-hour, 4-hour, 8-hour, and 12-hour. Unless otherwise configured in the "On Time" feature (by the Transcription Team), "Standard" is defined as 24 hours from the Upload date and time.

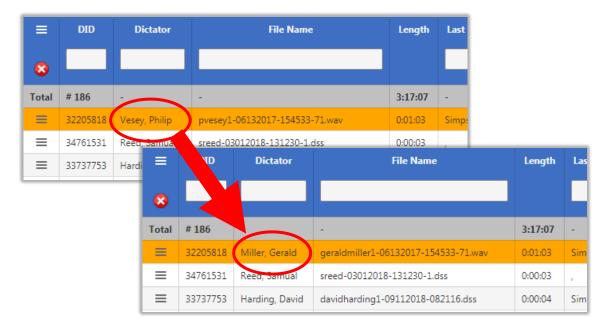
To change the TAT, select a dictation and click on the "Change TAT" button. Select the desired TAT change and click "Change".

nding Folder						1	olders	Settings	Reports L	.ogo
\varTheta 🔁 🗟 🚔 🖗 🔍	Search 🔇	Change	TAT 🙈 Ihange Dictator	Case Info	New D	ocument 闠 Del	ete 🕜 🧯	P	1yr 2	yr .
My Documents	Char	re File 1	AT							
Draft		TAT		~						
Pending	Ch	ange	Standard							
Inbox			1hr STAT							
	=	DID	2hr STAT	Dic	tated	File Name	Length	TAT	Report Type	ID
Rejected	Total	#1	4hr STAT 8hr STAT			-	0:01:07		-	-
Final	=	3557475	12hr STAT	<mark>/03/</mark>	/20 12:45	DrJTaylor-060	0:01:07	Standard		



2) 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 Healthcare Provider 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. The "Change Dictator" feature allows Transcription Team staff to change Healthcare Providers within the same Facility and from one Facility to another.



Case Info: More information on Case Info can be found on page 19.

3

4 New Document: This feature allows the Provider to create a new document directly into the Portal using Front End voice recognition software. More information on creating New Document using Front End voice recognition can be found on page 75.

Delete: More information on Delete can be found on page 25.



Columns

All available columns viewable in the Pending and their descriptions can be found starting on page 37.

Column Management

See page 41 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 77.

File Action Menu

All available "File Action Menu" options viewable in the Pending and their descriptions can be found starting on page 45.



Inbox

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

Janice Taylor Inbox Folder										Fo			.340 <u>repor</u> oorts Log	
🔮 🖶 🗃 👕 🝸 🔍 Search 📴 Open 📇 Print 🔂 Finalize 🚫 Reject 🍇 Change Dictator 🔰 🔝 Fax 🐻 Case Info 資 Delete 🌓 🗇 🗅												yr2yr		
My Documents		DID	0		2		A	Dictator	Dictated ▲	Jaded	Finished	First	Last	1
Draft		32433425						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	МО
	=	32433399						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	112
Pending	=	32433402						Taylor, Janice	09/22/	04/11/17 17:35	08/15/17 16:02	Min	Chan	112
Inbox	=	30230244	•					Taylor, Janice	02/25 3	02/26/16 08:10	03/07/16 12:09	Carta	Manning	402
Rejected	=	30230278	•	•				Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	402
Final	=	34489188	•					Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-
	=	35409549	•					Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-

The Inbox folder consists of three important areas:

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

3

1

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

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



Folder Management Functions

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3

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Janice Taylor Inbox Folder					(3)		5	7	DrJT. Iders Settin	~ /	. 340 <u>repor</u> ports Lo g	<u>rt bug</u> gout
🗐 \varTheta 🕄 🖩 音 🤋 🔍	Search	📑 Open 🜡	P	rint	F	inaliz	• 🛇	Reject ୡ Cl	hange Dictator	🔒 eSign 濫 Fax	🐻 Case Info 🥤	Delete	0 🖓 1	.yr2y
My Documents	=	DID			2	٢		ator	Dictated ▲	aded		First	Last	1
Draft	=	32433425	2	J				4 Janice	09/22/14 11:00	6 _{7 17:35}	8 7:31	Jessica	Smith	MO
Pending	≡	32433399						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	112
5	=	32433402						Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	112
Inbox	=	30230244		۰				Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	402
Rejected	=	30230278	•	•				Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	402
Final	≡	34489188	۰					Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-
	=	35409549	•					Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-

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

Open: This function opens the transcription document into Word. More information about the editing a transcription can be found on page 78.

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

Finalize: This function finalizes the transcription and moves it to the Final folder. More information about the finalized status can be found on page 77.

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 rejected status, please see page 77.

Change Dictator: More information on Change Dictator can be found on page 29.

eSign: This function allows the Healthcare Provider to add an electronic signature to the transcribed document. This feature is **only** available to the Healthcare Providers, and only the Healthcare Provider that dictated a file can esign that transcription. After selecting a

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dictation and clicking on the "esign" button, the Portal brings a pop up, asking for confirmation for the esigning.

Confirm e	Signature	
Once e-signe be modified l	d, the document(s) can or by you. Continue?	ly
eSign	Cancel	

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:

7 Fax: Transcriptions can be faxed directly from the Portal, via either an automatic setting or manually. For more information on automatic faxing, please see speak to the Facility Administrator.

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

	Send Fax
1	Search to locate fax recipient(s) name or fax number Search
	Include cover sheet
2	Name Fax Add
	Close Send Fax

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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.

Send Fax					Send Fax			
earch to locate fax reci	pient(s)			11	Search to locate fax reci	pient(s)		
Smith	Search				201	Search		
elect fax recipient(s)					Select fax recipient(s)			
Office Name	Contact Name	Location	Fax		Office Name	Contact Name	Location	Fax
Freeman Internal Medicine	Gerald Smith, MD		(757) 551-2122		Freeman Internal Medicine			(201) 555-1
Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1212		Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1
Smithers Associates			(888) 555-1212		Dr. Albert Jones			(201) 555-1
Smithers Associates	Frank Smithers, MD		1-423-432-9221					

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

Send Fax Search to locate fax reci 201	pient(s) Search		
Select fax recipient(s) Office Name	Contact Name	Location	Fax
Freeman Internal Medicine	Manfred E. Smith, MD	Location	(201) 555-1212
include cover sheet Add new fax recipient(s) Name	Fax		Add
save to address book			

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).

Send Fax
Search to locate fax recipient(s)
name or fax number Search
include cover sheet
John Kramer 124-509-9227 Add
save to address book
Close Send Fax

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.

Send Fax				
Search to loca	ate fax recipier	nt(s)		
name or fax	number	Search		
Select fax rec	ipient(s)			_
Office Name	Contact Name	Location	Fax	
John Kramer			(124) 509-9227	
include cov Add new fax John Kramer	recipient(s)	.24-509-9.	227	Add
save to add	dress book			
Close	Send Fax			

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



Send Fax			
Search to locate fax reci	pient(s)		
201	Search		
Select fax recipient(s)			
Office Name	Contact Name	Location	Fax
John Kramer			(124) 509-9227
Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1212
Dr. Albert Jones	Dr. Albert Johnson		(201) 555-1212
 include cover sheet Add new fax recipient(s) John Kramer 	124-509-9227		Add
save to address book			
Close Send Fa	x		

- 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. For more information about the cover sheet please speak with the Facility Administrator.
- 5. The "Close" button closes the window without sending the Fax while the "Send Fax" button sends the fax to the selected recipients.
- 8 Case Info: This allows the user to edit the demographics of a transcription. For more information about Case Info, please see page 19.

9

Delete: This allows the user to delete dictations and transcriptions from the workflow. For more information about deleting, please see page 25.



Columns

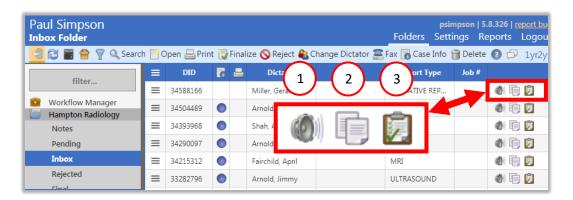
1

2

All available columns their descriptions:

Actions: This column contains three icons:

- Play Audio: Clicking on the "Play Audio" icon downloads the audio file to the computer and plays it to the computer' default audio player.
 - Document History: Clicking on the "Document History" icon opens a pop up window that shows all iterations of the transcribed documents for the transcription.
- 3 Audit Trail: This displays a list of all users who have accessed a document, the date/time of their access, and their actions such as opening, editing, finalizing, esigning, etc. (see below).



			DID 6	Dictator Miller, Gerald			eport Type RATIVE REP		
fijt Workflo My Doci		ment history	/ for 34504	489					
All Docu Notes	Open	Edited By	Patient MRN	Patient First	Patient First	Edit Date	Iteration	Restore	
Pendin		Arnold, Jimmy	1238366	Jessica	Lewis	12/12/19 14:5	0 76538789		
Inbox		Evans, Janice	1238366	Jessica	Lewis	12/06/19 15:0	4 76509146		
Rejecte		Simpson, Paula	1238366	Jessica	Lewis	11/21/19 09:0	3 76435808		
Final		Evans, Janice	1238366	Jessica	Lewis	09/05/19 15:3	3 76051103	1	
J. Arnolo		Simpson, Paula	1238366	Jessica	Lewis	05/24/19 09:5	8 75540686		
T. Paloc		Wallace, Connie	1238366	Jessica	Lewis	05/23/19 17:3	0 75537037		
T. Bales S. Demo									

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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.

<u>Column Selector</u>: 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.

<u>Dictated Date:</u> This is the date and time of dictation. On phone dictations, the date and time is when the Dictator 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 Dictator is the dictating user or owner of the transcription.

<u>DID</u>: 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.

<u>DOV</u>: The DOV stands for Date of Visit, the date the patient visited the Dictator.

<u>DOB</u>: The DOB stands for Date of Birth, the birth date of the patient that the Dictator is dictating on.

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

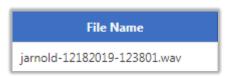
eSigned: This column displays if the transcription has been electronically signed by the Dictator.

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

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

<u>File Name</u>: 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:





"jarnold" – dictator' 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.

<u>Finished</u>: This column displays the date and time when the dictation was transcribed and uploaded.

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

<u>ID#</u>: 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.

<u>JobID</u>: For dictations made via the phone system, this column displays the Job ID given to the Dictator.

<u>Last Modified</u>: 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.

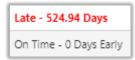
Location: For facilities using multiple locations.

<u>Locked</u>: 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.

<u>Note</u>: This column displays the "Clinic Note" written by the Transcriptionist while initially transcribing the dictation from the transcription tool.

<u>On Time</u>: This column displays if the transcription was delivered to the Dictator' 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.





<u>Opened</u>: This column displays if the transcription has been opened at least once.

<u>Printed</u>: This column displays if the transcription has been printed at least once.

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

<u>Report Type</u>: This column displays the name assigned to the template in the Template Manager. The Transcription team can set these templates up for the Dictators. Please speak with the Transcription Team with details for the template setup.

<u>Status</u>: This column displays the status of the file. See page 77 in the Document Management section for a full description of all Statuses.

<u>TAT</u>: this column displays the turn-around time assigned to a dictation. See page 28 for a full description of dictation Priority & TAT setup.

<u>Upload Date and Time</u>: 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 leftclick button on the mouse while simultaneously dragging the column to its new location.

Route	Re Cha	nge Dictato	or 词 Submit 👔	Case Info 📑 Op	en 🌒 Play	/ 🛃 Move	ne Export	🗑 Delete 👩				
	≡	DID	Facility	Dictator	Length	First	Last	Status	Rep	ort Typ		
	Total	# 194	-	-	3:15:55	-	-		-			
	≡	34761531	Maplewood S	Reed, Samual	0:00:03	Mikhail	Bekarov	Pending				
	≡	33737753	Caris, Sanders	Harding, David	0:00:04	Gerald	Cooper	Pendina	OFFIC	e note		
	≡	34504483	Hampton Rad	Fairchild, April	0:02:31	Jason	Bell	Open 🝘	Play 🛛	Move	Export	🔐 Delete
	≡	34504491	Advanced Ort	Harris, Moniq	0:02:31	Simson	Doug					
	≡	34504482	Hampton Rad	Johnson, Jim	0:02:31	Dennis	Banks	Leig	th Statı	Fin.t	Last	Status
								3:15:5		411-111	-	-
							al	3:15: 5		/ikhail	- Bekarov	- Pending
								0:00:0	3 N		- Bekarov	- Pending
_				se Info 📑 Op			e 🧼 Exp	0:00:0 ort 資 Dele	3 N	þ		- Pending
<mark>e</mark> Cha ≡	inge Dia		Submit 😱 Ca Facility	se Info 📑 Op Dictator	en 🌒 Pla Length	y 🛃 Mov Status		0:00:0	3 N			- Pending
≡							e 🧼 Exp	0:00:0 ort 資 Dele	3 N	þ		- Pending
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=							e 🧼 Exp	0:00:0 ort 資 Dele	3 N	þ		- Pending
=	DII		Facility		Length	Status	e 🏕 Exp First	ort 🔐 Dele Last	3 N te 2	þ		- Pending
E S Total	DII # 194	- 531 Ma	Facility - olewood S F	Dictator	Length 3:15:55	Status	e 🏕 Exp First	ort 🔐 Dele Last	3 N te 2	þ	Тур	- Pending
Total	DII # 194 34761	531 Maj 753 Car	Facility - - olewood S F is, Sanders H	Dictator	Length 3:15:55 0:00:03	Status - Pending	e 🏕 Exp First - Mikhail	ort 😭 Dele Last	3 N te 2	رچې Report آ	Тур	- Pending
Total	DI # 194 34761 33737	531 Maj 753 Car 483 Har	Facility - blewood S F is, Sanders F npton Rad F	Dictator deed, Samual darding, David	Length 3:15:55 0:00:03 0:00:04	Status - Pending Pending	e 🔶 Exp First - Mikhail Gerald	ort Cooper Bekarov Bell	3 N te 2	Report 1	Тур	- Pending

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).

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Image: Discurption of the status Discurption of the status Image: Discurption of the status Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status Image: Discurption of the status <thimage: discurption="" of="" status<="" th="" the=""> Image:</thimage:>	e 🔔 Cha	nge Dictato	r 🔁 Submit 🐻	Case Info 📑 O	pen 🍈 Play	/ 🛃 Mov			
Total # 194 - - 3:15:55 - = 34761531 Maplewood S Reed, Samual 0:00:03 Pending = 33737753 Caris, Sanders Harding, David 0:00:04 Pending = 34504483 Hampton Rad Fairchild, April X DID Facility Dictator = 34504491 Advanced Ort Harris, Moniq X DID Facility Dictator = 34504482 Hampton Rad Johnson, Jim X DID Facility Dictator = 34504479 Hampton Rad Malk, Jason DID Facility Is 2 ed, Samual Image: State of the s		DID	Facility	Dictator	Length	Status			
Total # 194 - - 3:15:55 - = 34761531 Maplewood S Reed, Samual 0:00:03 Pending = 33737753 Caris, Sanders Harding, David 0:00:04 Pending = 34504483 Hampton Rad Fairchild, April X DID Facility Dictator = 34504491 Advanced Ort Harris, Moniq X DID Facility Dictator = 34504482 Hampton Rad Johnson, Jim X DID Facility Dictator = 34504479 Hampton Rad Malk, Jason DID Facility Is 2 ed, Samual Image: State of the s	8								
Image: Standard S	_	# 194	-		3:15:55				
Image: Submit in the case later in	=	34761531	Maplewood S	Reed, Samual	0:00:03	Pending			
Image: Submit	=	33737753	Caris, Sanders	Harding, David	0:00:04	Pending			
≡ 34504491 Advanced Ort Harris, Moniq ≡ 34504482 Hampton Rad Johnson, Jim ≡ 34504479 Hampton Rad Malk, Jason Total Facility Iss. 2 Facility Iss. 2 eed, Samua □ Dictator ers Harding, Dava □ Pool Drt Harding, Dava □ Locked Drt Harris, Moni	=	34504483	Hampton Rad	Fairchild, April					
≡ 34504479 Hampton Rad Malk, Jason DID Total Facility I S. 2eed, Samua □ Dictator ers Harding, Dav □ Pool Drt Harris, Moni □ Locked Drt Harris, Moni	≡	34504491	Advanced Ort	Harris, Moniq				Facility	Dictator
≡ 34504479 Hampton Rad Malk, Jason DID Total Facility I S. 2eed, Samual □ Dictator ers Harding, Dav □ Routed To ers Harding, Dav □ Pool Drt Harris, Moni Locked Dictator ers Harris, Moni	=	34504482	Hampton Rad	Johnson, Jim	h .				
Total Facility Solution Image: Submit in Case Info Pool Drt Harris, Moni Locked Image: Submit in Case Info	=	34504479	Hampton Rad	Malk, Jason			DID		
■ Dictator ■ Bictator ■ Routed To ■ Pool Drt Fairchild, Ap Locked Drt Harris, Moni					Tot	al			
E Change Dictator To Submit To Case Jofe D'Open All						-	Facility	1.5	
E Pool ad Fairchild, Ap Locked Drt Harris, Moni Change Dictator Submit Case Info						-		1 2.1	ccu, sumue
Change Dictator - Submit - Case Info - Onen - All - Locked - Info								ers	
Change Dictator Submit Case Info Coop Miles and Licked									Harding, Dav
Change Dictator Submit Case Into Open Status							Routed To	ad	Harding, Dav Fairchild, Apr
		D ² + +					Routed To Pool	ad Drt	Harding, Dav Fairchild, Ap Harris, Monie
	Chang	e Dictator DID	Submit J	Case Info			Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Ap Harris, Monie
	Chang				Open (Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Ap Harris, Moni
	×				Open (Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Ap Harris, Moni
DID	× ×	DID	Dictator	Length	Open (Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Ap Harris, Moni
Total Facility 3:15:55	× × vtal	DID	Dictator	Length	Open (Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Ap Harris, Monie
Total Facility I a 3.00:03 Pending M	× × vtal	DID DID Facili	Dictator	Length	Open (Routed To Pool Locked	ad Drt	Harding, Da Fairchild, Ap Harris, Moni
DID - Facility - Dictator avid 0:00:04 Pending M	× × otal	DID DID Facili Dictat	Dictator ty tor	Length	Open (Status		Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Ap Harris, Monie
DID 3:15:55 - - ■ Facility Ia 0:00:03 Pending M ■ Dictator avid 0:00:04 Pending Ge ■ Routed To oril 0:02:31 OA Ja	× × ptal =	DID DID Facili Dictat	Dictator ty tor To orill orill	Length 3:15:55 3.00:03 0:00:04	Open (Status Pending Pending	E	Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Api Harris, Monio
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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:

Paula Simpson Workflow Manager Fold	ler							Folder	S	psimpson 5.8. Settings Rep	3 <mark>26 <u>report bu</u> orts Logou</mark>
🗐 🔁 🗃 管 🍸 冷 Rout	e 용 Cha	nge Dictato	r 당 Submit 🐻	Case Info	📑 Open (谢 Play 📃	Move 🧼 🖡	xport 🗑 De	lete	0 🖓	1yr 2yr A
All Facilities	≡	DID	Dictator	Length	Status	First	Las	TAT		Report Type	Last Modified
filter	8										
💼 Workflow Manager	Total	# 199	-	3:18:48	-	-	-	-	-	-	-
My Documents	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT			1
M. Abbott	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT		OFFICE NOTE	Simpson, Paul
S. Abraham	=	34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard			Bales, Zoey
 S. Ackerman N. Adair 	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT		SCH TEST	Bales, Zoey
A. Ahmed	=	34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard		CT SCAN	Simpson, Paul
 N. Ahmedli C. Aiken 	=	34504491	Harris, Moniq	0:02:31	QA	Simson	Doug	1hr STAT		OPERATIVE R	Bales, Zoey
A. Albers	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT		XRAY	Bales, Zoey
K. Alfaro	=	34504524	Harris, Moniq	0:01:08	QA	Victor	Agheboir	12hr STAT		CONSULT	Simpson, Paul
C. Alley C. Ames	=	34504604	Harris, Moniq	0:02:21	QA	Nancy	Comstock	Standard		DISCHARGE S	Bales, Zoey
W. Andersen	=	34504629	Harris, Moniq	0:00:48	QA	Greg	Jones	Standard		OPERATIVE R	Wallace, Con.
 P. Andolina S. Andrew 	=	34512978	Bales, Lowen	00:00:00	QA	Quinn	Bales	Standard		Blank Template	Bales, Zoey

The TAT column header in ascending sort:

Paula Simpson Workflow Manager Fold	ler							Folder	S	<mark>psimpson 5.8.</mark> Settings Rep	<mark>326 <u>report bug</u> orts Logout</mark>
🗐 🔁 🗃 👕 🍖 Rout	ie ୡ Cha	nge Dictato	r 词 Submit 🐻	Case Info	📑 Open (🎒 Play 📃	Move 🧼 🖡	port 🗑 De	lete	0 🗗	1yr 2yr All
All Facilities	≡	DID	Dictator	Length	Status	First	Las	TAT 🔺		Report Type	Last Modified
filter	8										
🙀 Workflow Manager	Total	# 198	-	3:18:36	-	-	-	-	-	-	-
My Documents	=	34504491	Harris, Moniq	0:02:31	QA	Simson	Doug	1hr STAT		OPERATIVE R	Bales, Zoey
M. Abbott	=	35003347	Arnold, Jimmy	0:00:12	Pending	Jeremy	Hobson	1hr STAT			,
8. Abraham	=	35022561	Bales, Lowen	0:00:02	QA	Allison	Smith	1hr STAT		A	Bales, Zoey
S. Ackerman N. Adair	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT			
A. Ahmed	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT		OFFICE NOTE	Simpson, Paula
 N. Ahmedli C. Aiken 	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT		SCH TEST	Bales, Zoey
A. Albers	=	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT			
K. Alfaro	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT		XRAY	Bales, Zoey
C. Alley C. Ames	=	34504524	Harris, Monig	0:01:08	QA	Victor	Agheboir	12hr STAT		CONSULT	Simpson, Paula
🗿 W. Andersen	=	34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard			Bales, Zoev
 P. Andolina S. Andrew 		34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard		CT SCAN	Simpson, Paula
N. Angell	=	34504604	Harris, Moniq	0:02:21	QA	Nancy	Comstock	Standard		DISCHARGE S	Bales, Zoey



The TAT column header in descending sort:

Paula Simpson Workflow Manager Folde	ŧr							Folders	psimpson 5.8.320 Settings Report	i <u>report bug</u> s Logout
🗐 🔁 🗃 骨 🍸 冷 Route	🚑 Cha	nge Dictato	r 词 Submit 🐻	Case Info	📑 Open	衡 Play 📃	Move 🧼 Exp	nt 🗑 Deiet	2 🗗 1	r 2yr All
All Facilities	≡	DID	Dictator	Length	Status	First	Last	TAT 🔻	Report Type	Last Modif
filter	8									
📫 Workflow Manager	Total	# 92	-	1:36:35	-	-	-	-		
My Documents	≡	35081472	Bales, Lowen	0:00:08	Pending			Standard		
M. Abbott	=	35072519	Bales, Lowen	0:00:36	QA	Ralph	Smith	Standard	A	Bales, Zoey
S. Abraham	=	34504524	Harris, Moniq	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Pa
S. Ackerman	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
🔞 A. Ahmed	=	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT		
 N. Ahmedli C. Aiken 	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
A. Albers	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Pa
K. Alfaro	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		
C. Alley	=	35147151	Bales, Traci	00:00:00	QA	Allison	Smith	1hr STAT	Blank Template	Bales, Zoey
W. Andersen	=	35109384	Bales, Lowen	00:00:00	QA	Michael	Salyers	1hr STAT	A	Bales, Traci
S. Andrew	≡	35081496	Bales, Lowen	0:00:05	Pending			1hr STAT		

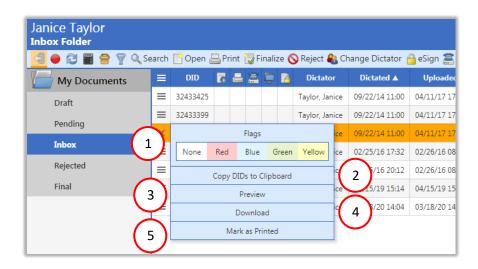


File Display

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 77.

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.



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:



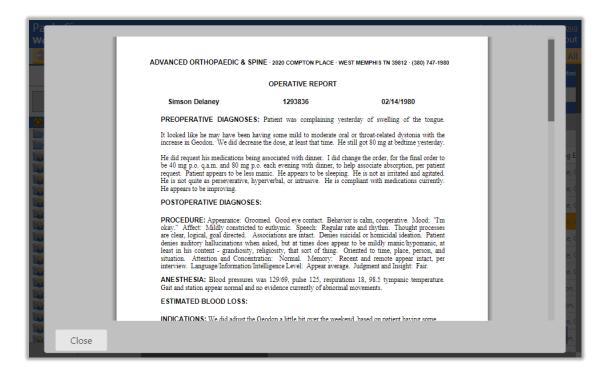
≡	DID	Dictator	Length	Status	First	Last		Report Type	Last Modified	Routed To	Comments	File Name	
8							<u></u>						۵
Total	# 198	-	3:17:51	-	-	-	-	-	-	-	-	-	-
=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov				Pool		sreed-030120	Ge
=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper		OFFICE NOTE	Simpson, Paula	Routing Error	Here's a com	davidharding	
≡	34504483	Fairchild, April	0:02:31	QA	Jason	Bell		SCH TEST	Bales, Zoey			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).

≡	DID	Dictator	Le	ength	Sta	tus	First	Last
8			Í	🔲 Ur	titled	- Note	epad	
<u> </u>				File	Edit	Form	at View	Help
Total	# 198	-	3:		1531 4482			
≡	34761531	Reed, Samual	0:	3450	4483			
≡	33737753	Harding, David	0:	3450	4524			
≡	34504483	Fairchild, April	0:					
≡	34504479	Malk, Jason	0:					
≡	34504482	Johnson, Jim	0:					
≡	34504491	Harris, Moniq	0:					
≡	34504524	Harris, Moniq	0:					
≡	34504604	Harris, Moniq	0:					
≡	34504629	Harris, Moniq	0:					
≡	34512978	Bales, Lowen	0					

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.





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:

Step 1: 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.



Janice Taylor Inbox Folder											
🔄 👄 😂 📓 🚔 🍸 Q, Se	arch	📄 Open 💧	- Pi	rint (😺 Fi	nali	ze 🔇	Reject 🌡	e Cl	hange Dictator	🔒 eSign 🚞
My Documents	≡	DID	d	-	2	٢	2	Dictato	or	Dictated 🔺	Uploaded
Draft	Draft		E 32433425 Taylor, Jan							09/22/14 11:00	04/11/17 17
	≡	32433399						Taylor, Ja	nice	09/22/14 11:00	04/11/17 17
Pending	×			F	lags				ice	09/22/14 11:00	04/11/17 17
Inbox	≡	None	Red	1	Blue	G	ireen	Yellow	ice	02/25/16 17:32	02/26/16 08
Rejected	≡		Com	/ DIDs	to	linh	oard		ice	02/25/16 20:12	02/26/16 08
Final	≡		cop			÷	ouru		ce	04/15/19 15:14	04/15/19 15
	≡	(Dov	wnloa	ad			ice	03/18/20 14:04	03/18/20 14
				leck	ac Dr	in let		<u> </u>			

<u>Step 2</u>: 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.

-		🔶 Set Se	parator		×			
Total	# 5000	-				-	-	
≡	42450	Wood	vhat separato	r should the filename use?		Calkre	1hr STAT	
=	42448	Wood	→ Dash (")		Calkre	Standard	
=	42449	Wood	S 11 - 1	21L 115		smith	Standard	
≡	47908	Tille, (→ Under	score ("_")	;	Scott	Standard	
=	113445	Wood	\rightarrow Space	("")	у	Arrowood	Standard	
=	119917	Wood	→ Percer	nt ("%")		Freeman	Standard	
≡	122028	Wood	, , , , , , , , , , , , , , , , , , , ,			Smith	Standard	
≡	125138	Woodard, Ja	0:00:04	In Final	SERENA	McLeod	Standard	
≡	126537	Renault, James	0:00:02	In Final	Sierra	Connors	Standard	
≡	202126	Woodard, Ja	00:00:00	In Final	JOHN	DOE	Standard	
≡	146552	Woodard, Ja	0:00:04	In Final	Carmen	Keilor	Standard	
≡	273723	Woodard, Ja	0:00:07	In Final 🗸 🗸	Jehnn,	100	8hr STAT	1
≡	156525	Mizell, David	0:00:06	In Final	no	dictation	Standard	

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

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- 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

<u>Step 3</u>: 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 Dictator' user ID.
- Provider First: Inserts the Dictator' first name.
- Provider Last: Inserts the Dictator' 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).



=	DID	Dictator	Lengti	* Select Fields X	rt Type
				🚸 Select filename components from list	
8				Filename:	
Total	# 5000	-	22:57:1	patient_last patient_first practitioner_last	-
=	42450	Woodard, Ja	0:00:02	dov dictationid	\
=	42448	Woodard, Ja	0:00:01		4
=	42449	Woodard, Ja	0:00:02		N N
=	47908	Tille, Charles	0:00:05	patient_last patient_first practitioner_last dov dictationid	1
=	113445	Woodard, Ja	0:00:01	\rightarrow DID	E
	119917	Woodard, Ja	0:00:06		N
=	122028	Woodard, Ja	0:00:06	\rightarrow Practice	E
=	125138	Woodard, Ja	0:00:04	\rightarrow DOV (MMDDYYYY)	4
=	126537	Renault, James	0:00:02	→ DOV (MM-DD-YYYY)	E
=	202126	Woodard, Ja	00:00:00		N
=	146552	Woodard, Ja	0:00:04	→ Provider ID	F
=	273723	Woodard, Ja	0:00:07	→ Provider First	E
=	156525	Mizell, David	0:00:06		E
=	181740	Woodard, Ja	0:00:06	\rightarrow Provider Last	4
=	181742	Woodard, Ja	0:00:08	→ Patient First	N
=	178565	Mizell, David	0:00:09	N. Dation Lond	[
=	241125	Woodard, Ja	0:00:09	→ Patient Last	N N
=	261850	Woodard, Ja	0:00:04	\rightarrow MRN	[
=	280916	Woodard, Ja	0:00:02	→ DOB (MMDDYYYY)	[
=	351492	Woodard, Ja	0:00:04	, 565 (1111557777)	E
=	458602	Woodard, Ja	0:00:03	→ DOB (MM-DD-YYYY)	NOTE E
=	461064	Fairchild, April	0:00:04	\rightarrow Done	NOTE F
=	3473029	Woodard, Ja	0:00:01		next
=	532167	Woodard, Ja	0:00:01	In Final Kirsten Poole Standard OFFIC	

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 Dictator 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".



🔀 Total	Select Folde		s PC → Desi	ktop		ن ک	Gearch Desktop		× P	
=	Organize	 New folde 	r						•	Woodard
	↓ N / ↓ U ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	finished finished Master M other Product	emails 12022 Aanual Proje on Audio file E Link projec I Faxes iots ier 2019	ct es NOT TE	SST				Date r ^ 12/11/ 12/11/ 1/10/2 1/10/2 1/10/2 12/11/ 1/10/2 12/11/ 1/10/2 12/11/ 1/10/2 12/11/ 1/10/2 1/10	Arnold, J Woodard Tille, Cha Evans, Ja Woodard Evans, Ja Arnold, J Evans, Ja
≡	`								>	Woodard
≡		Folder	Transcript	ions						Fairchild,
=				_		S	Select Folder	Cance	el	Evans, Ja Evans, Ja
=	181740	Woodard, Ja	0:00:06	In Final	John	Smith	1hr STAT			Arnold, J
≡	181742	Woodard, Ja	0:00:08	In Final	Louis	Freeman	Standard			Woodard

Step 6: 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

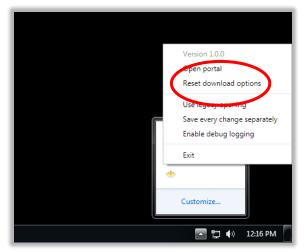


File Home				
\rightarrow \wedge \uparrow	Transcriptions		~ Ū	Search Tran 🔎
^	Name	Date modified	Туре	Size
📌 Quick	🗑 Adams-Beth-Malk-05192019-34504479.doc	1/10/2020 10:26 AM	Microsoft Word 9	13 KB
🛄 E 🖈	Mams-John-Arnold-06212019-34588258	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
🕂 E 🖈	Mpollos-Zebe-Arnold-06212019-3458810	1/10/2020 8:55 AM	Microsoft Word 9	21 KB
🎬 E 🖈	🖬 Aramonte-Dennis-Arnold-06212019-3458	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
📰 P 🖈	💼Arnold-11082019-35011016.doc	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
AI P	🖬 Arrowood-Jimmy-Woodard113445.doc	1/10/2020 11:50 AM	Microsoft Word 9	24 KB
Dict	🖮 Bales-Johnny-Arnold-05232019-34504518	1/10/2020 8:55 AM	Microsoft Word 9	21 KB
	💼 BLANK-SYSTEM-Arnold-09272019-34588	1/10/2020 8:55 AM	Microsoft Word 9	27 KB
user	💼 Calkre-Lisa-Woodard-03092007-42448.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
user	💼 Calkre-Lisa-Woodard-03092007-42450.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
😻 Dropł	🖬 Chresten-Martin-Arnold-06212019-34588	1/10/2020 8:55 AM	Microsoft Word 9	31 KB
🚉 dict	Freeman-Louis-Woodard-06132007-1199	1/10/2020 11:50 AM	Microsoft Word 9	26 KB
💷 Enri	🖬 Kline-Mercy-Arnold-06212019-34877487	1/10/2020 8:55 AM	Microsoft Word 9	33 KB
🔯 File	im McCord-James-Arnold-11202019-345880	1/10/2020 8:55 AM	Microsoft Word 9	33 KB
finis	🖬 Scott-Lewis-Tille-03142007-47908.doc	1/10/2020 11:50 AM	Microsoft Word 9	22 KB
	🗑 Smith-Alice-Arnold-06212019-34588257	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
<u> HIP</u>	🖬 smith-susie-Woodard-03092007-42449.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
🁧 mec				
📕 OnE				

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.



5

Mark as printed: This option marks the transcription as if it has been printed and adds the blue dot in the Printed column.



Rejected

2

3

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

🕘 🖥 音 🗑 🔍	Search	🗑 Delete	0 🗗			2			1	yr 2yr A
Documents		DID	Dictator	Dictated	Uploaded ▼	Finis	First	Last	ID #	Encounte
	=	34940729	West, Wally	10/08/19 10:07	10/18/19 13:44	12/20/19 14:45	Jessica	Smith	^HIOBFHIL^	
ing	=	34380676	West, Wally	04/15/19 15:14	04/15/19 15:18	04/19/19 15:49	Jessica	Smith	^HIOBFHIL^	
ing	=	33533576	West, Wally	05/30/18 12:51	07/19/18 10:7	3 ^{4/18 16:57}	Jessica	Smith	^HIOBFHIL^	
Inbox	=	33968454	West, Wally	05/30/18 12:51	07/19/18 10:2	4/19 15:29	Smith	Anderson	^KFJYUYKB^	
Rejected	=	33533467	West, Wally	05/30/18 12:51	07/19/18 10:05					

The Rejected folder consists of three important areas:

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.

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

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



Folder Management Functions

The first seven functions from the left are consistent in all folders and more information on them can be found on page 14. The only function in the Rejected folder is the Delete function and more details on it can be found on page 25.

Columns

All available columns viewable in the Rejected and their descriptions can be found starting on page 37.

Columns unique to the Rejected are:

<u>Rejection Reason</u>: This column displays the information provided by the Healthcare Provider while rejecting a transcription.

Column Management

See page 41 for a full description of column management features.

File Display

This section displays transcriptions that have been rejected by the Healthcare Provider. All visible transcriptions in this folder are of the Rejected status. For a detailed description of available file statuses and their meaning, see page 77.

File Action Menu

All available "File Action Menu" options viewable in the Rejected and their descriptions can be found starting on page 45.



Final

1

2

3

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 Healthcare Provider.

🗐 💼 📓 骨 🍸 🔍 Sear	ch 📑	Open 昌 P	rint [Cas	e Info		Fax 闠 Delete (0 🗇					1yr 2y
filter		DID	6	.	2 🔒	2	Dictator	Dictated	Uploaded	Finished V	Visit Date	DOB	Report Type
miter		34588241					Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	05/26/20 12:12	06/21/19	04/04/86	XRAY
w Manager	=	34588255			6		Arnold, Jimmy	06/21/19 13:53	06/21/19 13:57	05/26/20 12:06	06/21/19	08/21/75	CT SCAN
ding	=	34877483					Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:57	06/21/19		MRI
Libox	=	35137852					Arnold, Jimmy	12/18/19 13:38	12/18/19 13:40	04/20/20 13:09	04/20/20		
Rejecteo	=	35137844					Arnold, Jimmy	12/18/19 13:36	12/ 3	04/20/20 09:39	04/20/20	04/04/86	template boo
Final	=	35068759					Arnold, Jimmy	11/26/19 12:32	11/2	04/20/20 09:37	04/20/20		
J. Arnold T. Bales	=	35246373					Arnold, Jimmy	01/27/20 13:09	01/27/20 13:11	04/20/20 09:35	04/20/20		
					9								

The Final folder consists of three important areas:

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.

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

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



Folder Management Functions

The first seven functions from the left are consistent in all folders and more information on them can be found on page 14. The next six functions are explained in detail on page 32.

Columns

All available columns viewable in the Final folder and their descriptions can be found starting on page 37.

Columns unique to the Final folder:

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

	10/08/19
<u></u>	10/18/19
eSigned on	: 01/30/20 16:28 /17
<u></u>	06/08/17
<u></u>	06/08/17

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 41 for a full description of column management features.



File Display

This section displays transcriptions that have been finalized by the Healthcare Provider. All visible transcriptions in this folder are of the Finalized status. For a detailed description of available file statuses and their meaning, see page 77.

File Action Menu

All available "File Action Menu" options viewable in the Final folder and their descriptions can be found starting on page 45.



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

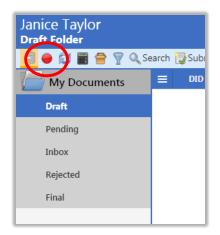
Using Dictate to record audio

Healthcare Providers can record audio files by using the Dictate button while being in any folder.

Please note: WebChartMD's front-end audio recording workflow utilizes hardware already purchased and installed on the Healthcare Provider's computer. WebChartMD does not provide the front-end audio recording hardware.

To record audio using the Dictate, the Healthcare Provider follows these steps:

1. While in any folder, click the "Dictate" button on the Folder Management toolbar.



2. This brings up the recording interface.



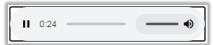
Janice Taylor Draft Folder My Documents DD Draft Pending 2 Draft 0:00 / 0:00 Draft Pending
Draft 0:00 / 0:00 •
Pending 2 > 0:00 / 0:00 +)
Inbox
Rejected Search Patient 3
Final Visit Date
First
Last 5
Report Type
· · · · · · · · · · · · · · · · · · ·
Location
10 Default ~
Submit Cancel

1 Record / Stop button: Clicking this button starts recording the audio from the Healthcare Provider' recording microphone. During the recording process, this icon glows/blinks a deeper shade of red. This means that the recording is in process.

Audio Track: This displays the length of recording.

2

Note: The track does not update to show any numbers during the recording process but only displays the total length of audio on clicking the play icon once the recording is completed. Hovering the mouse over the volume icon brings the volume slider which can be used to increase or decrease the playback audio volume.





3 Search Patient: The search field uses full or partial names (atleast three characters) for both first and last names. The search displays a list of patient names. This list of patients can be spread to multiple pages and can be accessed with the "next >" and "< prev" links at the top.

And		
	Page 1	<u>next ></u>
James Andrew	[112210-01]	
James Andrew	[112210-01]	
James Andrew	[112210-01]	
Anderson 0326	595 [^UOHDEUL	.N^]
Janice Anderso	on [LA-28541]	
Janice Anderso	on [LA-285412]	
Kishen Gandhi	[LO-461881]	
Andrew Jacobs	on [79828]	
Anderson Smit	h [^XLGFRUGT	1
Andrew Vincer	nt [6382522]	

Search Patient	
and	
<pre>< prev Page 2</pre>	
Smith Anderson [^KFJYUYKB^]	
Andrew Johnston [^WNJZXSTM^]	

Visit Date: The patient' date of visit can be added by clicking in the Visit Date field. This provides with a calendar popup which can be clicked into or the user can type the date directly into the field.

4

l	June		v 20'		20	~
June			✓ 202	20		·
Pre	evious N	Ionth		Next I	Month	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				



\frown	
5	First: This contains the first name of the patient.
\smile	·

(6)

7

8

Last: This contains the first name of the patient.

DOB: This contains the Date of birth of the patient.

ID #: This contains the MRN or identification number of the patient.

Search Patient							
<u>< prev</u> Page 2	2						
Smith Anderson [^KFJYU	(КВ^]						
Andrew Johnston [^WNJZXSTM^]							
Smith							
Last							
Anderson							
DOB							
12/07/1978							
ID #							
^KFJYUYKB^							
Report Type							
	~						
Location							
Default	~						
Submit	Cancel						

9

Report Type: The "Report Type" dropdown provides a list of all templates in the system for the Healthcare Provider. A template can be preselected

Report Type
~
[Vista Deve - J. Taylor] Behavior Modification Note
[Vista Deve - J. Taylor] Early Intervention Screening Note
[Vista Deve - J. Taylor] Occ Therapy Consult
[Vista Deve - J. Taylor] Psych Eval
[Vista Deve - J. Taylor] Title XIX Form
[Vista Developme] Family Letter
[Vista Developme] Nursing Health Assessment



Location: This field provides the Location for the dictation.



11

Submit and Cancel: The submit button submits the dictation to the system. The cancel button cancels the entire dictation and returns the user to the Portal.



Using iPhone to dictate

Healthcare Providers can use The WebChartMD Dictate and Review mobile app on an iPhone to dictate.

Installation of WebChartMD: Dictate and Review



- The mobile app for WebChartMD is in the Apple App Store. Search for WebChartMD: Dictate and Review
- Download the app by clicking the 'Get' link in the app window (The screenshot provided is showing a cloud because the app has previously been downloaded)



Set Up WebChartMD: Dictate and Review



WebChartMD: Dictate and Review App by pressing on the Gray and Yellow Icon newly placed on your home screen

0 4 🗖 🖬	🕩 🛈 🃸 🚧 79% 🛢 11:16 PM
1	
▶ 0:00 / 0:00 -	•
Search Patient	
Date of Visit	
Date of Visit	
First Name	
Last Name	
Date of Birth	
ID #	
Report Type	
	*
Location	
Default	•
Submit	Cancel
erande Alberton.	
\bigtriangledown	Ô 🗆
7	9

You'll initially be given the main dictation app page. Click Settings, located at the bottom right-hand corner of the application to log into the application.



11:34 🕫	
Settings	
Login	

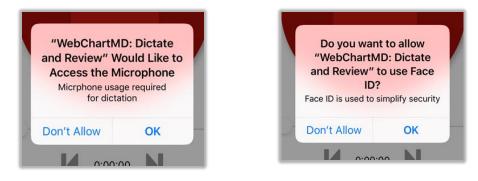
11:34 ৵		
	*	
S	ign in to your account	
	Jsername	
	Password	
	Cancel	
ac	gin with your WebChartM count to upload dictation review completed report	s

The Settings page will allow you to click the link for login.

When the application opens go to settings > Login> then enter the same credentials you use to log into the WebChartMD Portal.

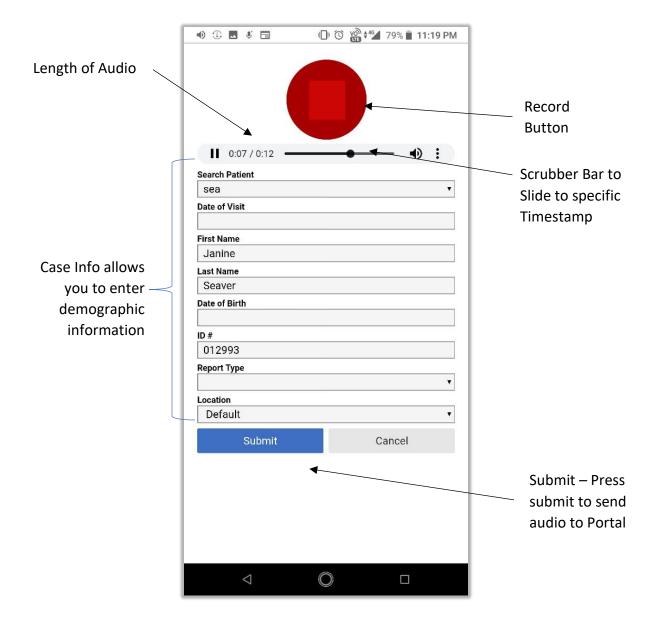
First time Setup:

You will receive the following messages from your iPhone. You will want to allow for use of the Microphone, and if you do want to use FaceID, you'll need to allow the second prompt as well.





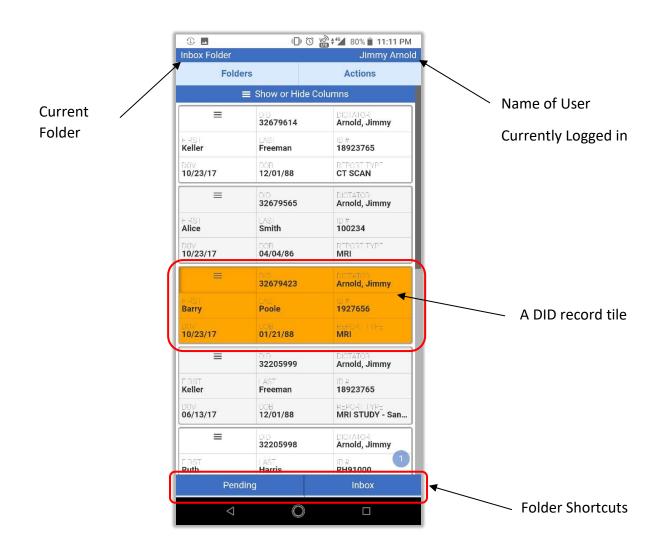
The Dictation Application





Mobile Portal – Care Provider

The Main Page / Initial Log in / The Folders View





Switching Folders

0 🖬	0	₩ 📲 80% 🖹 11:11 PM
Inbox Folder		Jimmy Arnold
Folders		Actions
My Draft	Hide C	olumns
My Pending	4	DICIAIOR Arnold, Jimmy
My Inbox		
My Rejected		18923765
My Final	3	CT SCAN
	5	DICTATOR Arnold, Jimmy
		100234
	5	REPORT TYPE MRI
	:3	DIOTATOR Arnold, Jimmy
		1927656
	3	REPORT TYPE MRI
	9	DICTATOR Arnold, Jimmy
		ID # 18923765
	3	REPORT TYPE MRI STUDY - San
	8	DICIAIOR Arnold, Jimmy
		RH91000
Pending		Inbox
\bigtriangledown	0	

To switch folders, tap on the Folders button and then tap on the corresponding folder name.



The Actions Pane

0 🖬 🗖	j (j)	📸 🕈 🕍 80% 📋 11:11 PM
Inbox Folder		.limmy Arnold
Fold	ers	Actions
	■ Show or Hide Co	olum 🥚 Dictate 🔍
≡	32679614	Search
S Keller	LASI Freeman	. 📄 Open
DOV 10/23/17	DOB 12/01/88	🛛 🜄 Finalize
=	010 32679565	Change Dictator
F RST Alice	LASI Smith	eSign
DOV 10/23/17	00B 04/04/86	Case Info
=	DID	
	32679423	, 🐼 Logout
Barry	Poole	
00V 10/23/17	00B 01/21/88	
=	010 32205999	Ţ.
F RST Keller	LAST Freeman	
DOV 06/13/17	DOB 12/01/88	ł
≡	32205998	
r RST Ruth	LAST Harris	i
Pene	ding	Inbox
⊲		

To make changes to the DID, select the DID first by tapping on it so it turns Orange.

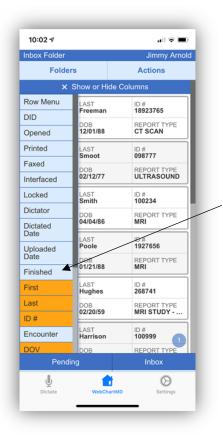
Once the DID tile is highlighted in Orange, tap the Actions button at the top and tap the desired action.



Customizing the Information tile

Fold	lers	Actions
	E Show or Hide	Columns
FIRST	DAST	ID #
Keller	Freeman	18923765
DOV	DOB	REPORT TYPE
10/23/17	12/01/88	CT SCAN

To customize the displayed information in a DID tile, tap on the Show or Hide Columns button first and a menu will pop out.



To Rearrange the information blocks within a DID tile, tap the column names in the dropdown menu to select or unselect them.

- Unselecting a block will remove it from its current position and shift the remaining tiles.
- Selecting a block (so it turns orange) will add that information at the next available spot in the tile (or create a new row if the current tile is full).



Information Block

- If Block No. 4 was removed, 5 and 6 would shift left to occupy 4 and 5 spots.
- If a new block was added, such as DID number, it would create a new row and occupy position 7, directly underneath 1 and 4.

FIRST	LAST	ID #
Alice	Smith	100234
DOV 10/23/17	DOB 04/04/86	REPORT TYPE
FIRST	LAST	ID #
Keller 1	Freeman 2	18923765 3
DOV 10/23/17 4	DOB 12/01/88 5	CT SCAN 6
FIRST	LAST	ID #
Kyle	Smoot	098777
DOV 10/23/17	DOB 02/12/77	REPORT TYPE



Opening Documents

10:03 🕫		•il 🗢 🔳
		\otimes
504 West M	adiology Center lission Avenue # N 37624 – (423)	
ULTRASOU	IND	
Smoot, Kyle 098777 DOB: 02/12		
EXAM:		
CLINICAL:		
FINDINGS:		
IMPRESSIO	DN:	
Jimmy Arnol	ld, MD, FACP	
JA/cw		
D: 10/23/20 T: 11/02/201	17 2:52 PM 7 8:54 PM	
be distracted page when I of using Lore or-less norm	stablished fact that d by the readable looking at its layou em [psum is that i nal distribution of I using 'Content he	content of a ut. The point t has a more- etters, as
Ų	WebChartMD	Settings

Upon double-tapping the DID tile, the Portal will open the document within an inbuild pdf reader for the user to read.

Altering Case Info

10:02 🕫		·1 🔶
Inbox Folder		Jimmy Ar
Folders		Actions
=	Show or Hide €	Columns
FIRST Keller	LAST Freeman	ID # 18923765
DOV 10/23/17	DOB 12/01/88	REPORT TYPE

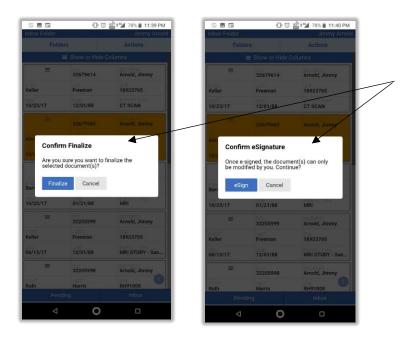
To update the Case Info of a dictation, select the DID tile so it turns orange, then tap on Actions and then Case Info.



Inbox Folder			80% 🗎 11:1 Jimmy /	rnol
Folders			Actions	٦
Case Info				
Search Patient	1			
First Name	Barry			5
Date of Birth	01/21/198	в		ſ
Report Type	[Hampton	Radiolo] MR	રા 🔻	
Billing Codes				
Date of Visit	10/23/201	7		
Last Name	Poole			
ID #	1927656			
Note				
Location	Default		*	
Up	Update date Case a		nt	1
Pendir	ıg		Inbox	_
1 2 3	4 5	6 7	8 9	0
q`w'e'	r t'	y'u	i o	p
a [®] s′ o	d [®] f⁻ g	h.	j [*] k	1
순 z >	(c) v	b	າ <u>່</u> m້	\boxtimes
?123 , 🤅	9			→

A new section will pop up, allowing for editing of the Demographics for the case info.

Finalizing and E-Signing dictations



Tapping the Finalize or the eSign buttons under Actions will create a popup allowing users to perform those actions.





In case the dictation needs to be transferred to a different provider, the Change Provider button to switch providers.

Helpful Tips & Tricks

Tips

• All audio files are encrypted on the device at the time of recording. The audio files will be automatically deleted from the device when you A.) Upload the dictation or B.) Manually kill the application

Tricks

• If you have an audio file you need to trash you can force the audio to be deleted by forcing the application to close. Minimize the application, and swipe up on the home screen, then swipe up to Kill the application



Using Dragon with WebChartMD

Healthcare Providers can incorporate front-end speech recognition tools like Dragon into their WebChartMD workflow.

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

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

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

Lowen Bales Draft Folder									Fold		ales2 5.8. ngs Rep		
🗐 🔴 🔁 📓 音 🍸 Q	Search	Case In	fo 📑 Oren 🛽	Ne	ew Document 🍟	Pelete 🕜 🗇						1yr	2yr All
filter	≡	DID	Dictator		opiouucu Date	Report Type	ID #	First	Last	DOB	DOV	Note	Locatio
niter	=	35109207	Bales, Lowen		12/10/19 11:32	А	123456	Mike	Salyers	02/12/56	12/10/19		Default
My Documents	=	35033887	Bales, Lowen		11/15/19 09:52	А	^CJSCDLUO^	RJ	Cooper		11/15/19		Default
Draft	≡	35033553	Bales, Lowen		11/15/19 08:02	А	^ELJCJMCG^	christopher	williamson		11/15/19		Default
Review	≡	35033551	Bales, Lowen		11/15/19 08:02	А	513533	Unknown	Patient		11/15/19		Default
Pending	=	35033549	Bales, Lowen		11/15/19 08:01	A					11/15/19		Default
, in the second s	≡	35033548	Bales, Lowen		11/15/19 08:00	А	123456	Mike	Salyers	02/12/56	11/15/19		Default
Inbox	=	35028736	Bales, Lowen		11/14/19 08:16	А					11/14/19		Default

- 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 Healthcare Provider's Inbox.
 - e. After filling out the information in the fields, click the "Open New Document" button in the Case Info box (below).



Lowen Bales Draft Folder						Fold	lowen Jers Setti	<mark>bales2 5:8</mark> ings Rep	
🗧 🛛 🗃 🖀 🍸 Q. Search	Case Info Open		Delete 🔘 🛱						
filter									
	35109207 Bales Lowen	12/10/19 11:32	A 1234	56	Mike	Salyers	02/12/56	12/10/19	Default
My Doc Case Info									Default
Draft									Default
Review Search Patier	it		Date of Visit	01/17/	2020				Default
Pending First Nam	e Ralph		Last Name	And and a state of the state of					Default
Date of Birt	h 04/08/2019		ID #	57458					Cefault
Report Type	[Fidelity I - L. Bales] X-F	Ray 🔻	Note						Default
Rejected Billing Code	s		Location	Defau	lt		•		Default
Final Statu	s Draft	•							Default
Fidelity									Default
Open New	Document Cancel								

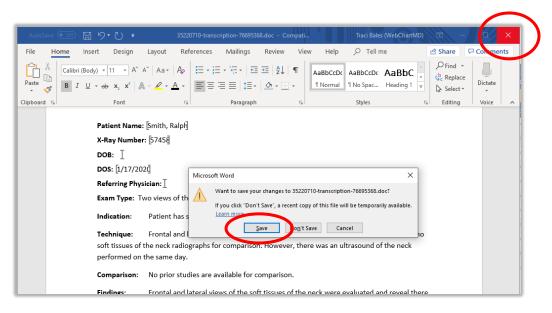
3. The selected template opens, and Case Information populates into the template (below).

Lowen Bales Draft Folder								Fold		nbales2 5.8 ttings Re		
🧧 🔴 🕄 📓 音 🍸 Q, s	earch [o Case Info	📑 Open	📑 New Document	Delete 🕜 🗇						1yr 2	2yr All
filter	≡	DID	Dictator	📔 Uploaded Date	Report Type	ID #	First	Last	DOB	DOV	Note	Location
	=	3 AutoSav	e 💿 0ff)	間りでしゃ	35220363-tra	anscription-766950	94.doc - Compa	tibility Mo	de - Saved	Tra	aci Bales (V	WebChartM
My Documents	=	3 File	Home		Layout Refe	rences Mailir	ngs Review	View	Help	Ø Tell r	ne	
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Review	=		Calibri			i≡ • i≡ • V≣ •			AaBbCcDc	AaBbCcDc	AaBb)C 📮 🧯
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	=	3										
Rejected	=	3										
Final	=	3										
Fidelity Insurance	=	3										
M. Bales												
				Batiant Nam	e: Smith, Ralp	٥						
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				DOB:	er. [2743ğ							
				DOB: 1/17/2	Бсо							
				DOS: 1/1//2	024				_	_	_	

- 4. The Healthcare Provider 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 Healthcare Provider 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.

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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 Healthcare Provider.

<u>Rejected</u>: Dictations that the Healthcare Provider has returned to the Transcription Team for further corrections.

<u>Finalized</u>: The dictations that have been sent to the Healthcare Provider's final folder.

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

<u>Deleted</u>: 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 by the Facility Administrator.

<u>E-Signed</u>: Transcriptions that the Healthcare Provider 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.

Paula Simpson Inbox Folder			Folde	<mark>psimpson</mark> ers Settings	5.8.326 <u>repo</u> Reports Lo	
🗐 🔂 🗃 🖶 🦞 🔍 Sea		int 🔯 Finalize 🚫 Reject 🍓 Change Dictator 🚞 Fax	🐻 Case Info 🍵	Delete 🕜 🗇		
All Facilities	🗸 📃 🛛 DID					
	35109384					
		A 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4	Marger, Gerald	06/21/19 14:07	Shari	
Workflow Manager	≡ 34504486	File locked by another user	old, Jimmy	05/23/19 15:33	Franklin	
My Documents All Documents	34504489	Another user has this document over	old, Jimmy		Jessica	
Pending	≡ 34393987	Another user has this document open. It has been locked to prevent editing. Any changes made will not be saved.	h, Ashish	04/18/19 15:12		
			old, Jimmy		Ryan	
Rejected	≡ 34215312	Click below to open a read-only copy or Cancel to exit.	hild, April	02/25/19 10:11	Marcia	
Final			d, Samual		Alberts	
M. Abbott S. Abraham	33737752	Open read-only Cancel	ding, David	09/11/18 09:18	Albert	
S. Ackerman	33499492		d, Samual	03/01/18 14:12	Lorie	,
N. Adair A. Ahmed	≡ 33499490	Maplewood S	Reed, Samual	03/20/18 11:26	Jane	
N. Ahmedli	33499096	Maplewood S	Conner, Charl			

Edit

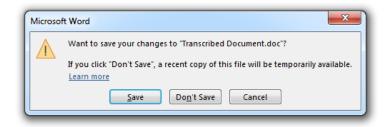
Edit is a permission-based function which enables users to edit transcriptions. As with the "Open" function, the edit function requires the installation of WebChartMD's DocHandler. To edit a transcription, highlight the transcription and click the "Open" button in the toolbar. The transcription will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

7 🔍 Searc	h 📑 C	Open 昌 Pri	nt 🕎 F	inalize	🚫 Rej	ect 용 Change D	ictator 濡 Fax 🐻 C	ase Info 🥤	Delete	0 🕫			
ies 🔹	≡	DID	6	1 2		Facility	Note	Dicta	ator	Dictated Date	First	Last	ID #
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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. Please speak with the Facility Administrator for "Interface Re-export" feature.



Settings View

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Settings View Overview

1

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

Vista Developmental Services	DrJTaylor 9,340 <u>report bug</u>
Settings	Follers <u>Settings</u> Relorts Logout
A My Settings	

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

Vista Developmenta Settings	Services Dr.JTaylor 5.8.340 report Folders Settings Reports Log	
4		_
🍇 My Settings	Change Password	
Change Password	Current Pas	
Fax Log	New Passw Confirm Pas Passwords must be at least 8 characters in 2 and contain at least one number, special character, or upper case letter. Change	

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

2 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.



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:

ista Developmen Httings		DrJTaylor 5.8.340 <u>report b</u> Settings Reports Logo
My Settings	Change Password	
Change Password	Current Pas	
Fax Log	New Passw Contim Pas Passwords must be at least 8 characters in length, and contain at least one number, special character, or upper case letter. Charge	

🛛 🚫 Failed Faxes 🔚 Res	and Selected 🤞	Export Failu	res for Month					
My Settings	did, nar	ne, or fax nu	mb Search	Clear				
Change Password	DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Da
Fax Log	33533575	James Smith	(555) 555-5555	failure	Calls to 555 n	Smith Anders	07/19/18 10:27	03/19/19 1



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.

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.

Vista Developmental Settings		DrJTayloi s Settings	r 5.8.340 ; Reports	
Mu Cattings Change Password	Change Password Current Pas			
Fax tog	New Passw Confirm Pas Passwords must be at least 8 characters in length, and contain at least one number, special character, or upper case letter. Change			

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.

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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:

Vista Developmental Settings							DrJTaylor 5.8.3 ettings Repc	
Seiled Faxes 🚍 Resence			_	_				
🌉 My Settings	did, nar	ne, or fax nu	mb Search	Clear				
Change Password	DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Date
Fax Log	33533575	James Smith	(555) 555-5555	failure	Calls to 555 n	Smith Anders	07/19/18 10:27	03/19/19 13:50
	1							

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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.



Reports View

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Reports

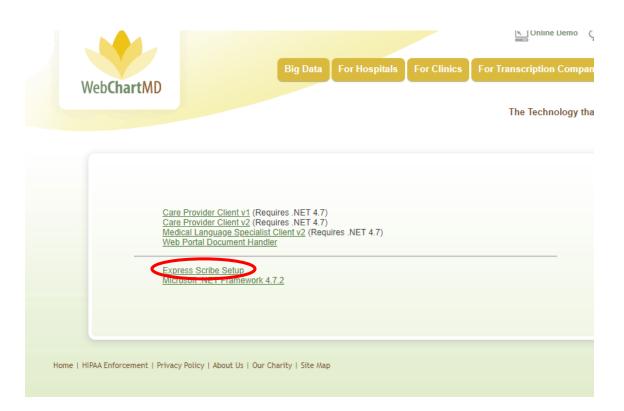
<u>Reports Per Day</u> – This report can be run by the Healthcare Provider and shows the total number of reports transcribed (by day) for a given time frame.

<u>Lines Per Day</u> – This report can be run by the Healthcare Provider and shows the total number of lines transcribed (by day) for a given time frame.



Appendix 1: Express Scribe

The Express Scribe version 5.10 can be downloaded from our Downloads page at <u>www.webchartmd.com/downloads</u>. 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.



)	Installing Express Scribe v 5.10
	License Agreement
	Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
	1. The copyrights in this software and my visual or sude work distributed with the software is belong to KH. Software and other lated in the book took. All rights are researed Installation of this software is located only in accordance with these terms. 2. So which we have a software is a software is a software is and on behalf of your employer or principal, sagres to be bound by these terms. Fou do not agree to any of these terms is you do not agree to any of these terms is you any on the software is a software is a software in the software is a software is a software in the software is a software is a software in the software is a software is a software is a software in the software is a software is a software is a software is any of these software is any of these software is any circumstances where here is any software is any soft
	Next Ca

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

🍚 🗾 Instal	ling Express Scribe v 5.10	×
Related	Programs and Extras	
	optional extras that complement this program and provid tools you might like to use:	de additional functionality.
Select	al	
	Express Dictate [Recommended] Express Dictate is a professional dictation recorder for letting users record and send dictations from their corr	
•	Web Dictate Internet Dictation Software Web Dictate is a dictation system that lets you record the internet with any ordinary web browser.	
•	Express Delegate Dictation workflow management with the ability to aut members of typing pools based on customizable rules.	
	NCH Software Internet Browser Toolban Get direct access to all NCH Software from within you blocker, email notifier, free streaming TV, radio, weath one of the most useful toolbars around and it's free.	Ir browser. Also includes a pop-up
	Set the default web search to be the NCH Search	1
	Set the start page to be the NCH search page	
	By choosing this you agree to the Toolbar End User License Agreement	Toolbar Privacy Policy
		Finish

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.

For Windows 8/10 only:

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'.

					Online Demo 🦕
		Big Data	For Hospitals	For Clinics	For Transcription Companie
WebChartMD					The Technology that
Ca	are Provider C edical Langua	<u>Slient v1</u> (Requires .NET 4.7) <u>Slient v2</u> (Requires .NET 4.7) ge <u>Specialist Client v2</u> (Requ ument <u>Handler</u>			
EX Mi	press Scribe crosoft .NET	Sotue Open link in new <u>t</u> ab Open link in new <u>w</u> indow Open link in incognito wir			
Home HIPAA Enforcement Privacy Poli	cy About Us	Save lin <u>k</u> as Copy link addr <u>e</u> ss			
		l <u>n</u> spect	Ctrl+Shift+I		

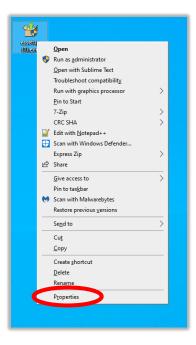
When the user clicks 'Save link as' they will be presented with a 'Save As' window. From here the user will need to save the download to their desktop.

Save As				×
$\leftarrow \rightarrow \land \uparrow$	→ Th	s PC → Desktop v ♂ Search Desktop		9
Organize 👻 Ne	w fold	и	== •	?
💻 This PC	^	Name	C	Dati ^
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		😥 GoToMeeting	2	2/20
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Save as <u>t</u> ype:	Appli	ation (*.exe)		\sim
∧ Hide Folders		Save	Cancel	

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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.

실 essetup.exe Pr	operties				×
Security	Cotails			Previous Vers	ions
General	Compatibility	Arch	ive	Digital Sig	natures
an earlier versior matches that ear Help me choose - Compatibility m	e the settings	the com	patibility		
Settings Run in 25	6 colors 0 x 480 screen resol	ution			
Disable vi	sual themes				
Disable de	esktop composition				
🔲 Disable di	splay scaling on high	n DPI set	tings		
Privilege Level	rogram as an admin	istrator			
😗 Change s	ettings for all users				
		ОК	C	ancel	Apply



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.

Installing Express Scribe v 5.10	×
License Agreement	
Please read the following License Agre continuing with the installation.	ement. You must accept the terms of this agreement before
belong to NCF Software and offsets in of this software is licensed only in acc 2, and the software is licensed on the software proper program and the society target of surplayer and software for the software of surplayer within 14 days to notice inductor systems and all accompanyin intend to rely on this software for onlice meducator systems and assume any in 4. We will not be table for any toat and the software is and assume any in 4. We will not be table for any toat clasms is intraction to the software for and clasms is intraction to the software is a physical 6. You may not, under any circumstane but you may not, under any circumstane our programs without within permission our programs without within permission our programs without software is not	software pour, on nyour own behalf and on behalf of your dig these terms. They use in days of these digitations, and the software - whun it to the place digitations, and the software - whun it to the place digitations of the software - whun it to the place digitation of the software digitation of the software response to milest except as requered by law. If you digitation of the software including, but not grant of the software including. But not did the amount you paid for the software in division of a of the mount you paid for the software regitation of the place to including the software including the software regitation of the place to including the software including the software regitation of the place to including the software including the software regitation of the place to including the software including the software regitation of the place to including the software including the softwa
 I agree with these terms I do not agree with these terms 	
	Next Cancel

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.



Open Seribic Run with graphics processor Open file location Image: Seribic Run as gdministrator Open file location Image: Seribic <			
Sertise Run with graphics processor > Open file location Image: Sertise in the system of the	Evoress	<u>O</u> pen	
Image: Second state of the system		Run with graphics processor	>
Qpen with Sublime Text Troubleshoot compatibility Pin to Start 7-Zip CRCS SHA If Edit with Notepad++ Scan with Windows Defender Express Zip Pin to taskbar Scan with Malwarebytes Restore previous versions Send to Cut Copy Create shortcut		Open file locat <u>i</u> on	
		🐶 Run as <u>a</u> dministrator	
Ein to Start 7-Zip CRC SHA Image: Edit with Notepad++		Open with Sublime Text	
7-Zip > CRC SHA > Image: Edit with Notepad++ Image: Edit with Notepad++ Image: Edit with Windows Defender Express Zip Express Zip > Pin to taskbar > Image: Scan with Malwarebytes Restore previous versions Send to > Cut		Troubleshoot compatibility	
CRC SHA >		Pin to Start	
		7-Zip	>
€can with Windows Defender Express Zip Pin to taskbar Pin to taskbar W Scan with Malwarebytes Restore previous versions Send to Cut <u>Copy</u> Create shortcut		CRC SHA	>
Express Zip > Pin to taskbar > Scan with Malwarebytes		Edit with Notepad++	
Pin to taskbar ♥ Scan with Malwarebytes Restore previous versions Send to Cut Copy Create shortcut		🚼 Scan with Windows Defender	
Scan with Malwarebytes Restore previous versions Send to Cut Copy Create shortcut		Express Zip	>
Restore previous versions Send to Cut Copy Create shortcut		Pin to tas <u>k</u> bar	
Send to Cut Copy Create shortcut		😽 Scan with Malwarebytes	
Cu <u>t</u> <u>C</u> opy Create <u>s</u> hortcut		Restore previous versions	
<u>C</u> opy Create <u>s</u> hortcut		Se <u>n</u> d to	>
Create <u>s</u> hortcut		Cu <u>t</u>	
-		<u>С</u> ору	
		Create shortcut	
<u>D</u> elete		Delete	
Rename		Rena <u>m</u> e	
P <u>r</u> operties	C	P <u>r</u> operties	

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

Security	Details	Previous Versions
General	Shortcut	Compatibility
	Windows, select the version.	nd it worked correctly or compatibility mode that
Run this prog	gram in compatibility r	node for:
Settings		
📃 Run in 256 c	colors	
📃 Run in 640 x	480 screen resolutio	n
Disable visua	al themes	
🔲 Disable desk	top composition	
Disable displ	ay scaling on high Di	PI settings
Privilege Level		
Run this prog	gram as an administra	tor
Change setti	ngs for all users	

Once compatibility has been set, Express Scribe is installed and ready to be used.

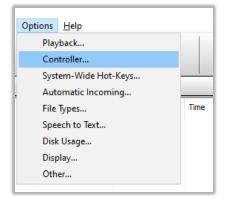
Setting Up Food Pedal:



File Control			Options He	\frown				
Sync Sync	Load	Dock -	Scribe Mini		Suite			🕜 Help
7 B B ;			=					
Dictation Name			Sender	Date	Time	Duration	Priority	Deadlin
¢								

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'.



Disk	Usage		Display		Other
layback	Controller	Hot-Keys	Incoming	File Types	Speech to
Cashie have	I-held or foot pe	and a second and			
		sual controller			
Active con Controller		None			
Status:		Not configured			
Status.		Not conligured			
	Proper	ties		Command map / t	test
Change a	ctive controller				
		Control	lor octure without		
		Control	ler setup wizard.		
Taplack		Control	ler setup wizard.		
Tap lock	e tan lock	Control	er setup wizard.		
Enabl	e tap lock		ler setup wizard.		
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Enabl	nable unlock tir	ne-out			
Enabl		ne-out		 a controller	
Enabl	nable unlock tir	ne-out			
Enabl	nable unlock tir	ne-out			
Enabl	nable unlock tir	ne-out			
Enabl	nable unlock tir	ne-out			

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.