



User Manual

Facility Healthcare Provider Version

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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.

Dictator: 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”.

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

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

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

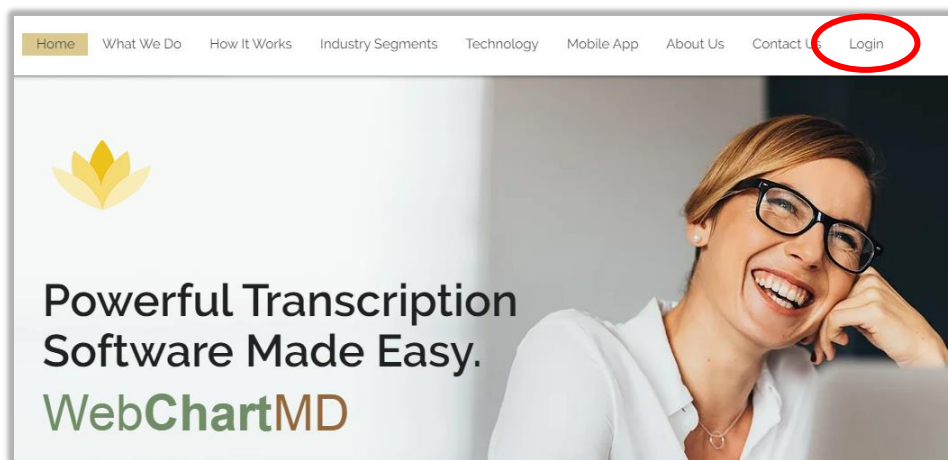
Facility: The healthcare entity serviced by the Transcription Team. For the purpose of this manual, Facility is used synonymously with location, department, and office.

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

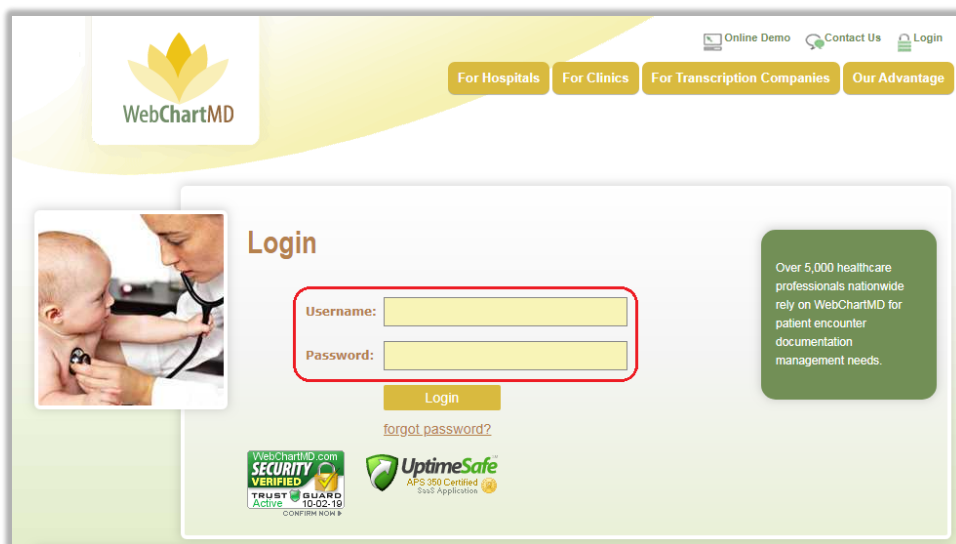
Transcription Team: the group of transcriptionists providing service to the Facility. The Transcription Team could be an outside vendor (Transcription Team), or an in-house transcription department.

Logging into the Portal

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



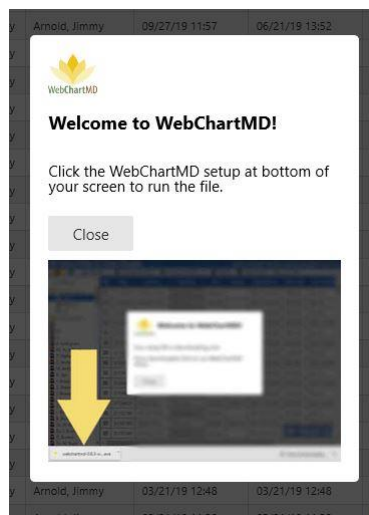
Enter your username and password in the fields and click on the Login button. If the username and password are correct, it will log in to the portal. If incorrect, a message will be displayed indicating that it is incorrect.



Software Installation

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

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

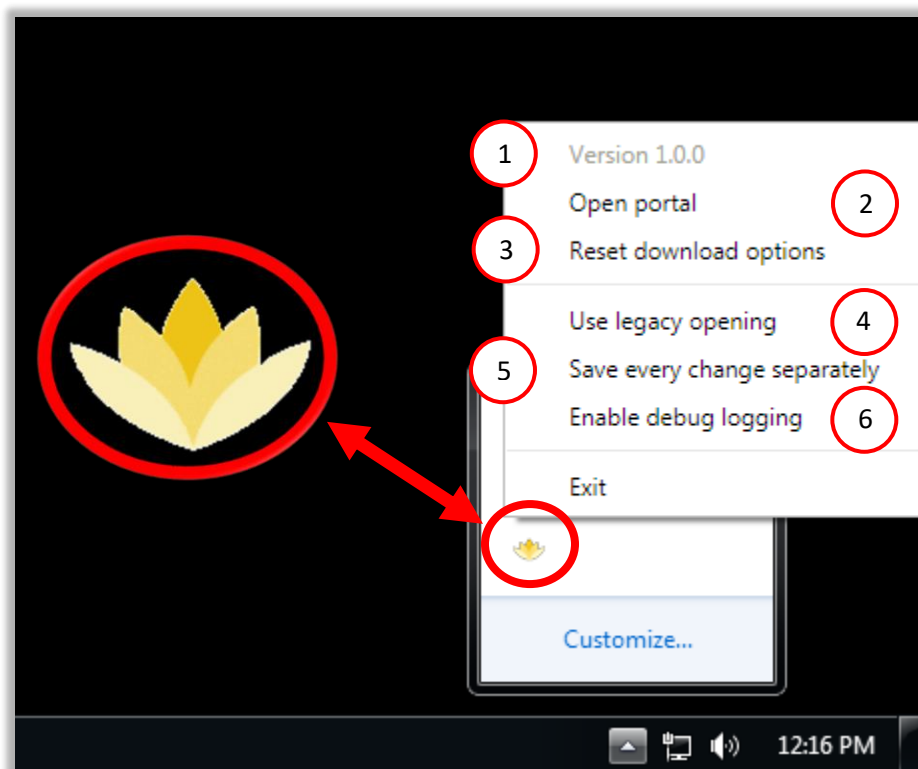


Once the download is complete, click the downloaded file to install it.

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

DocHandler

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

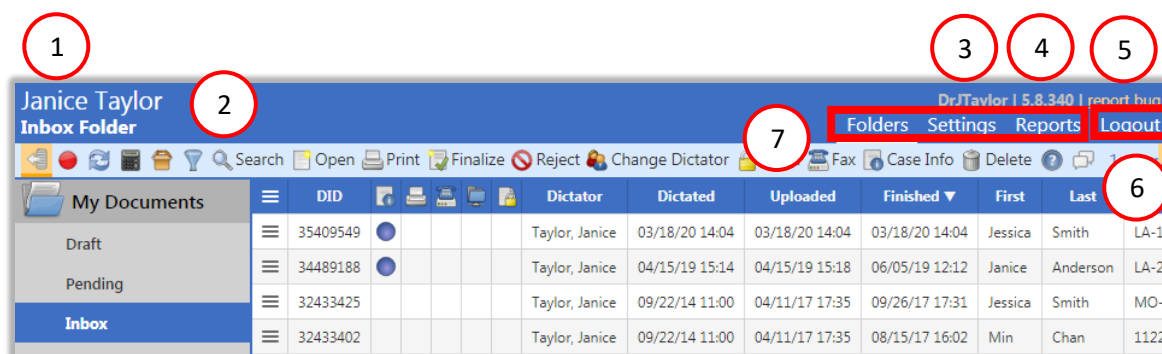


Right mouse-clicking the logo causes the following menu items to appear:

- 1 Version number: The current version of the DocHandler. The DocHandler updates automatically when new versions are available.
- 2 Open portal: Clicking this option launches the WebChartMD Login page. WebChartMD is compatible with Internet Explorer (version 10 and 11), Google Chrome, Mozilla Firefox, Safari and Opera.
- 3 Reset download options: This option works in conjunction with the Download option of the dictations (on page 46) resetting both the file naming convention and preferred download location as set by the user.
- 4 Use legacy opening: This option is used by WebChartMD support staff to troubleshoot the DocHandler.
- 5 Save every change separately: Checking this option enables the user to manually save edits to a document on demand by using the control+S shortcut or pressing the “save” icon along the top edge of Microsoft Word.

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

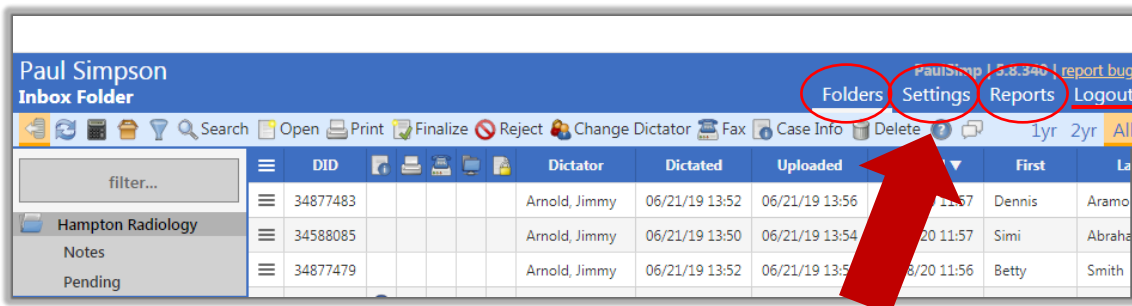
Initial View When Logging In



- 1 Name
The **Name** of the folder currently being accessed is displayed in the top left corner.
- 2 View and Folder Name
The **View Name** is displayed right underneath the user' name. The view name changes as the user navigates to different folders and comes in handy when visiting different folders.
- 3 Username
The **Username** that is logged into the current session is displayed in the top right.
- 4 Version Number
The **Version Number** is displayed next to the username.
- 5 Report Bug
The **Report Bug** link allows the user to send notes back to the developer on any bugs encountered while using the application.
- 6 Log out Button
The **Logout button** logs the user out of the Portal, ending the current session

7 System Functional Areas (Views)

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

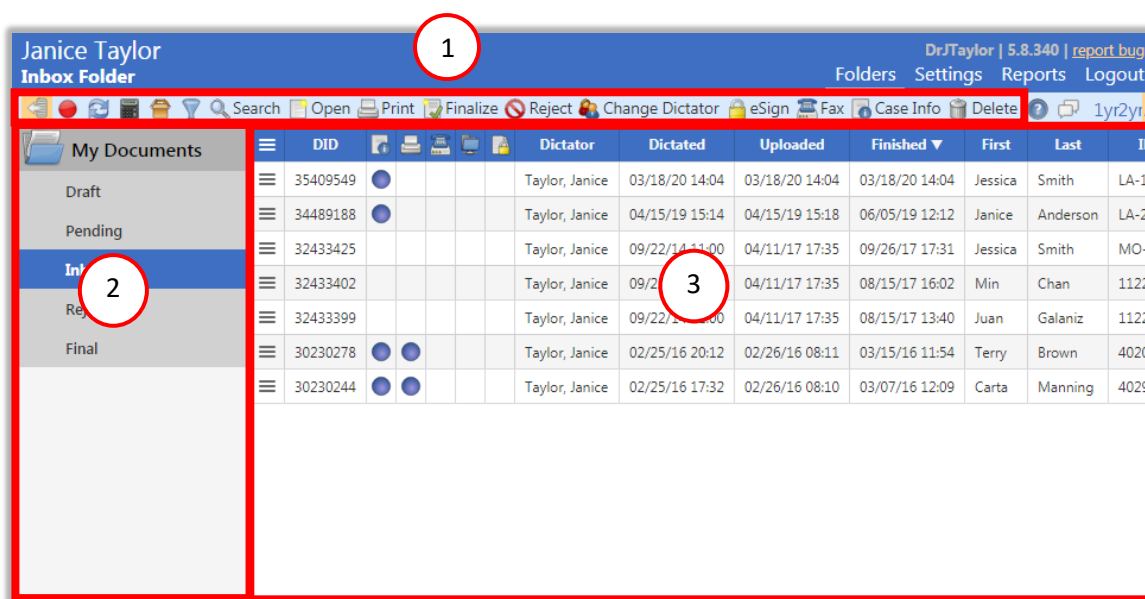


- **The Folders view** displays the folders in which the dictation and transcriptions are accessed. More details can be found on page 13.
- **The Settings view** accesses the various workflow settings used by the Transcription Team and healthcare Facilities. More details can be found on page 81.
- **The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

Folders View

Folder View Overview

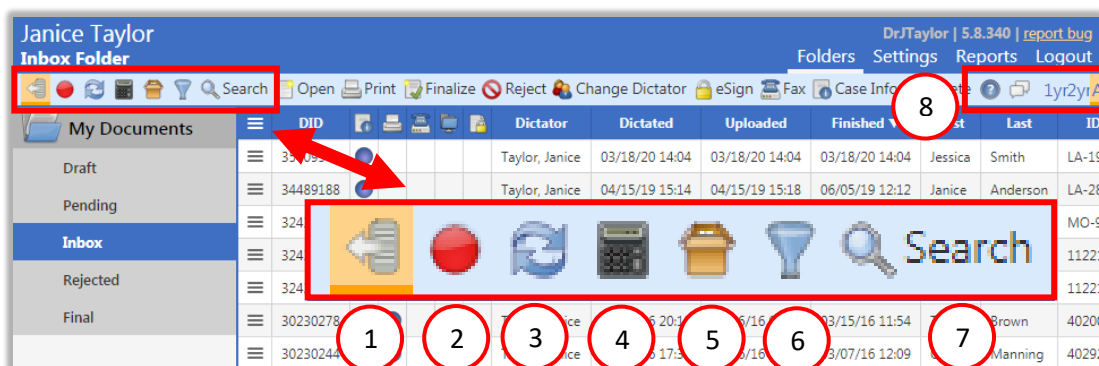
The Folders view loads by default when users first log in. It is also accessed by clicking the “Folders” link in the top right-hand corner of the screen. The Folders view can be broadly grouped into three visual areas:



- 1 **Workflow Management Toolbar:** Along the top edge of the Folders view is the Functions Ribbon, or toolbar, which contains buttons used to perform various workflow related tasks.
- 2 **Folder Pane:** Displays all folders used in the workflow.
- 3 **File Display:** Displays all dictations and transcriptions in the workflow.

Folder Management Functions

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



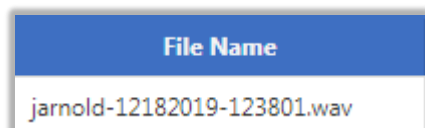
- 1 **Pin Sidebar** – This toggle button shows or hides the folder pane containing folders below the All Facilities column.
- 2 **Dictate** – This allows the Healthcare Provider to make recordings from the Portal. More details on this feature can be found on page 58.
- 3 **Refresh** – Refreshes the data 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.
- 4 **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.
- 5 **Sort By** – Groups the dictations based on selected criteria such as a specific date or a Healthcare Provider.
- 6 **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.
- 7 **Search** – Allows the user to search the files for specific information.

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

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

Fields requiring explanation:

- The “DID” field represents the unique 8 digit Dictation Identification number.
- The “Uploaded from” and the “Uploaded TO” fields work together to display dictations that were dictated during a specific date range.
- The “Filename” field allows the user to search for a specific dictation using the name of the audio file. The audio file name has a specific naming format:



“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.

- 8 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:

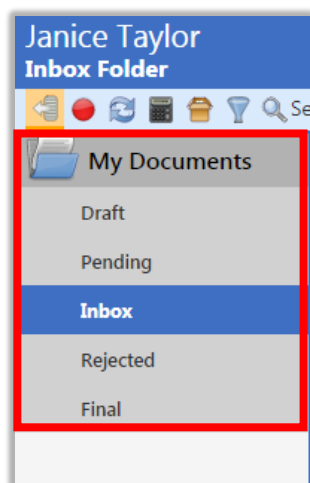
- The shorter the time interval selected, the faster the folder's content will load.
- All transcriptions regardless of the date are always available for access on the system by using the Search feature.

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.



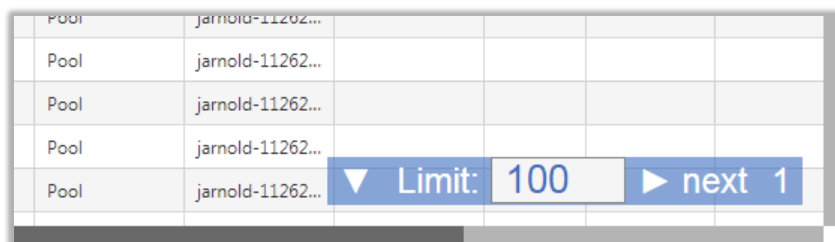
The Inbox folder within the “My Documents” is selected.

File Display

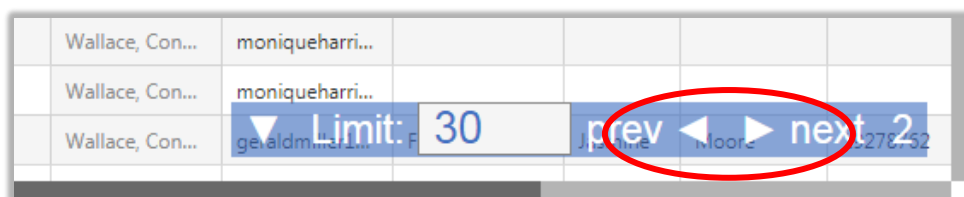
To the right of the Folder Pane is the space for File Display. This display contains a series of rows, each of which represents a dictation, or audio file (if in the Pending folder) or a document if in any other folder. The exception to this rule is the File Display within the Workflow Manager (see page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

Row and Page Setting

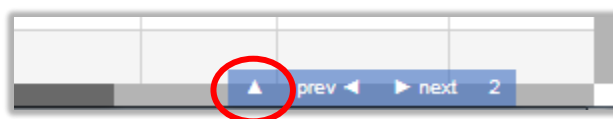
In the bottom right-hand corner of the file display is the row and page setting. The number of rows that are displayed, each row containing a file, can be adjusted in the page numbering block at the bottom right. The default setting of 100 rows per page can be customized by clicking the box containing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



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



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



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

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:

Janice Taylor Inbox Folder										
Dr/Taylor 5.8.340 report bug										
Folders Settings Reports Logout										
Search Open Print Finalize Reject Change Dictator eSign Fax Case Info Delete 1yr2yr										
My Documents	DID			Dictator	Dictated	Uploaded	Finished	First	Last	ID
Draft	35409549			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
Inbox	32433425			Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	MO-9
Rejected	32433402			Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	1122
Final	32433399			Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	1122
	30230278			Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	4020
	30230244			Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	4029

Draft: This displays the Draft folder created by the Healthcare Providers.

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

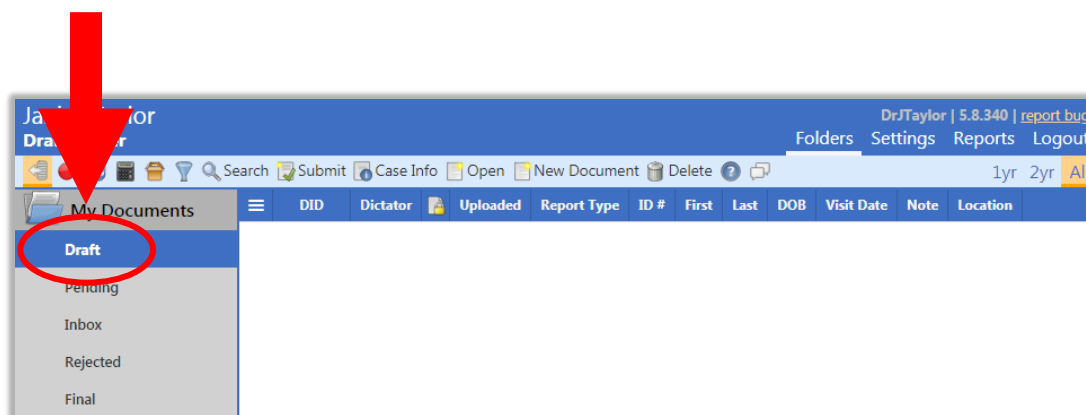
Inbox: This displays the dictations that need to be transcribed.

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

Final: This displays the dictations that have been finalized.

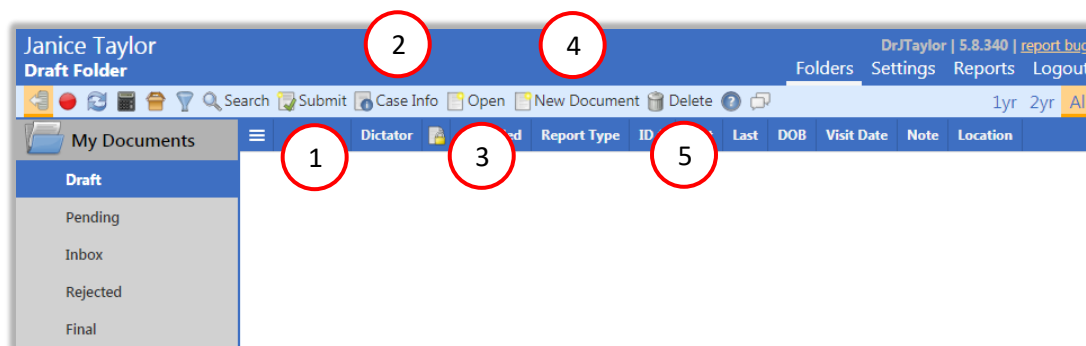
Draft

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:

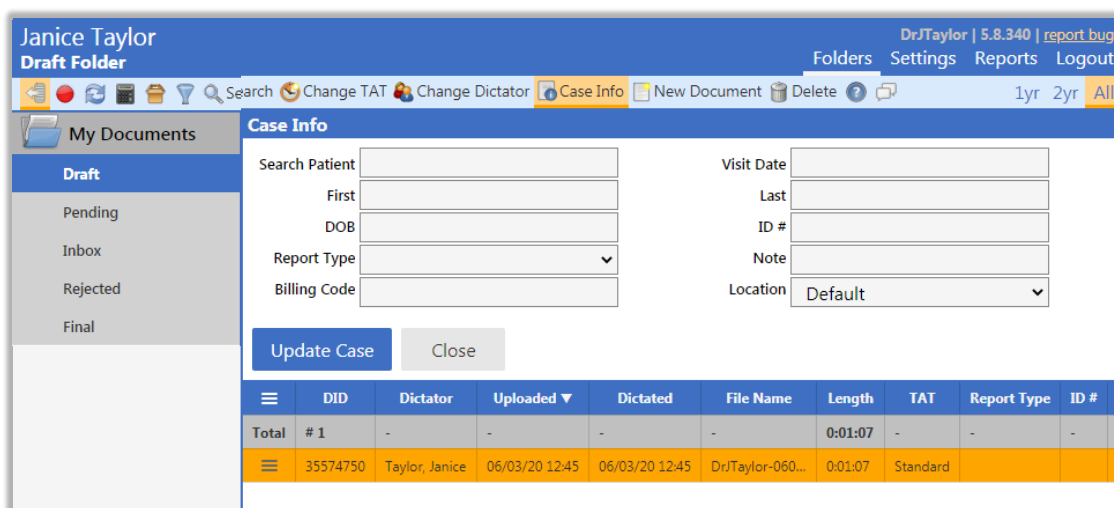


- 1 **Submit:** Submit is used to move the audio to the next step in the workflow, which in almost all cases will be to submit a completed transcription from the Draft and into the Healthcare Provider's Pending folder.
- 2 **Case Info:** The Case Info function allows the user to add or change demographics associated with a dictation (via the Pending folder) or transcription (via all other folders). After selecting the desired row on screen and clicking the Case Info button, a panel will appear displaying fields that can be edited.

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

Fields requiring explanation:

- The “Search Patient” field enables search on previously transcribed patients. Entering in a first name, last name, Patient ID, or a partial of any of those three options will cause a list to appear of all entries in the data base matching the search criteria.
- The “ID” field represents the MRN (Medical Record Number) of the patient.
- The “Report Type” field gives a list of all Report Types (sometimes called Work Types or Templates) associated with the Healthcare Provider / author.
- The “Note” field is a free text field. This field is used by the Transcription Team to send messages regarding the transcription back to the Facility.



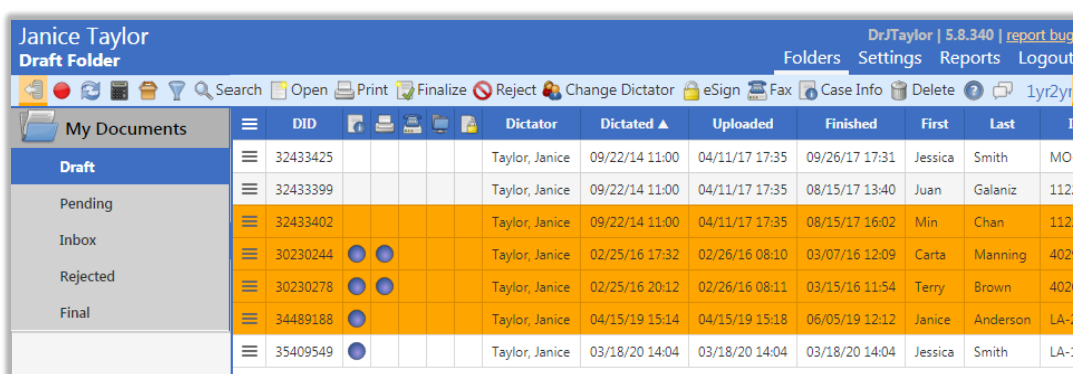
	DID	Dictator	Uploaded ▼	Dictated	File Name	Length	TAT	Report Type	ID #
Total # 1	-	-	-	-	-	0:01:07	-	-	-
	35574750	Taylor, Janice	06/03/20 12:45	06/03/20 12:45	DrJTaylor-060...	0:01:07	Standard		

- 3 Open: “Open” is a permission-based function which enables users to open transcriptions using the Microsoft Word software installed on the local computer. Microsoft Word is accessed by WebChartMD’s DocHandler (see page 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.

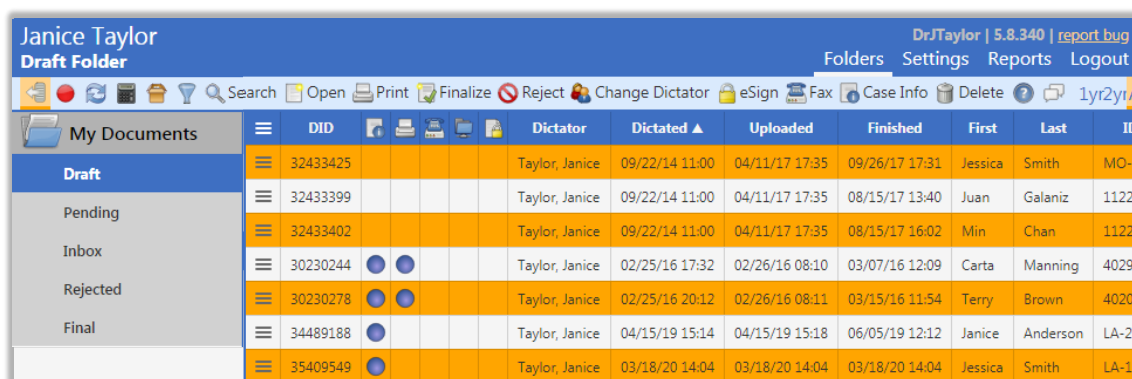
Opening multiple transcriptions simultaneously: This feature is available only in Internet Explorer 10 and 11 and uses Active X settings. (see installation instructions for Active X settings needed). To open multiple transcriptions simultaneously, use the Shift key to select a batch of transcriptions,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



	DID	Dictator	Dictated	Uploaded	Finished	First	Last	ID
	32433425	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	MO-9
	32433399	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	1122
	32433402	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	1122
	30230244	Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	4029
	30230278	Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	4020
	34489188	Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-28
	35409549	Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-19

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.



	DID	Dictator	Dictated	Uploaded	Finished	First	Last	ID
	32433425	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	MO-9
	32433399	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	1122
	32433402	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	1122
	30230244	Taylor, Janice	02/25/16 17:32	02/26/16 08:10	03/07/16 12:09	Carta	Manning	4029
	30230278	Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	4020
	34489188	Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-28
	35409549	Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-19

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

Draft

1

5

9

Visit Date

2

4

Last

ID #

6

8

Note

Location

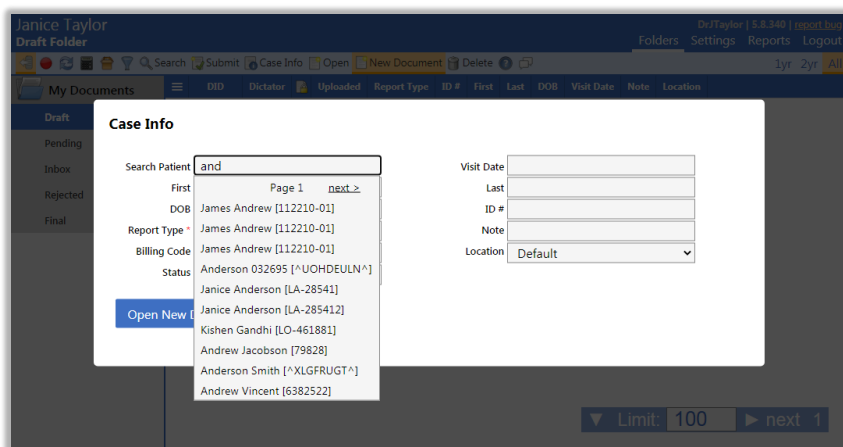
Default

10

Open New Document

Cancel

1 Search Patient:



The screenshot shows the 'Case Info' form with a search dropdown open. The search field contains the text 'and'. The dropdown list displays a list of patient names and their associated IDs. The list is paginated, showing 'Page 1' and 'next >' and '< prev' links. The list includes the following entries:

- James Andrew [112210-01]
- James Andrew [112210-01]
- James Andrew [112210-01]
- Anderson 032695 [^UOHDEULN^]
- Janice Anderson [LA-28541]
- Janice Anderson [LA-285412]
- Kishen Gandhi [LO-461881]
- Andrew Jacobson [79828]
- Anderson Smith [^XLGFRUGT^]
- Andrew Vincent [6382522]

The 'Open New' button is visible at the bottom of the dropdown list. The 'Case Info' form fields are visible in the background, including 'Visit Date', 'Last', 'ID #', 'Note', and 'Location' (set to 'Default').

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 [next >](#)

James Andrew [112210-01]
James Andrew [112210-01]
James Andrew [112210-01]
Anderson 032695 [^UOHDEULN^]
Janice Anderson [LA-28541]
Janice Anderson [LA-285412]
Kishen Gandhi [LO-461881]
Andrew Jacobson [79828]
Anderson Smith [^XLGFRUGT^]
Andrew Vincent [6382522]

Search Patient

and

[< prev](#) Page 2

Smith Anderson [^KFJYUYKB^]
Andrew Johnston [^WNJZXSTM^]

- 2 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.

Janice Taylor
Draft Folder

Dr/Taylor | \$5.8340 | [report bug](#)

Folders Settings Reports Logout

1yr 2yr All

My Documents

Case Info

Search Patient

First

DOB

Report Type *

Billing Code

Status Draft

Open New Document Cancel

Visit Date 03/01/2020

Last March 2020

ID # March 2020

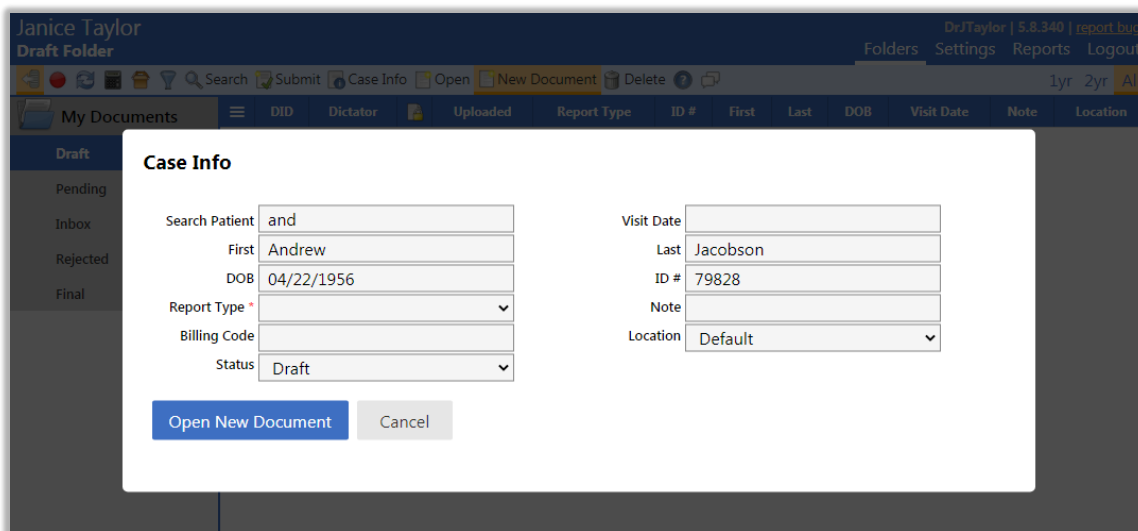
Note

Location

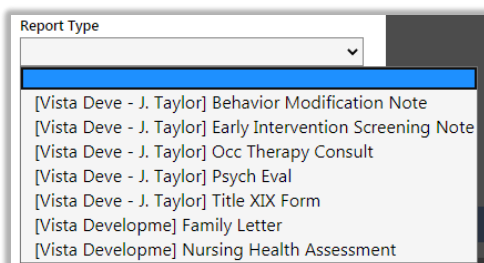
Previous Month				Next Month		
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

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

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



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

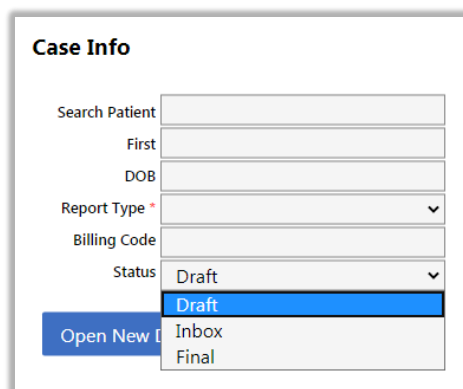


- 8 Note: This is a free text field that allows the Healthcare Provider to add notes along with the dictation.

- 9 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.

- 10 Location: For facilities using multiple locations.

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



Case Info

Search Patient

First

DOB

Report Type *

Billing Code

Status

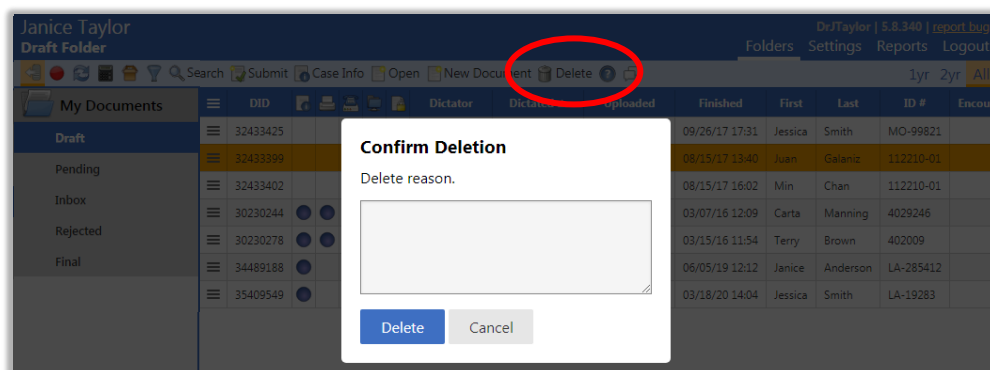
Open New Document

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

Dr Taylor | 5.8.348 | report.htm

Folders Settings Reports Logout

Search Submit Case Info Open New Document **Delete**

My Documents

	DID	Dictator	Dictation	Downloaded	Finished	First	Last	ID #	Encoun
Draft	32433425				09/26/17 17:31	Jessica	Smith	MO-99821	
Pending	32433399				08/15/17 13:40	Juan	Galano	112210-01	
Inbox	32433402				08/15/17 16:02	Min	Chan	112210-01	
Rejected	30230244				03/07/16 12:09	Carta	Manning	4029246	
Final	30230278				03/15/16 11:54	Terry	Brown	402009	
	34489188				06/05/19 12:12	Janice	Anderson	LA-285412	
	35409549				03/18/20 14:04	Jessica	Smith	LA-19283	

Confirm Deletion

Delete reason.

Delete 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

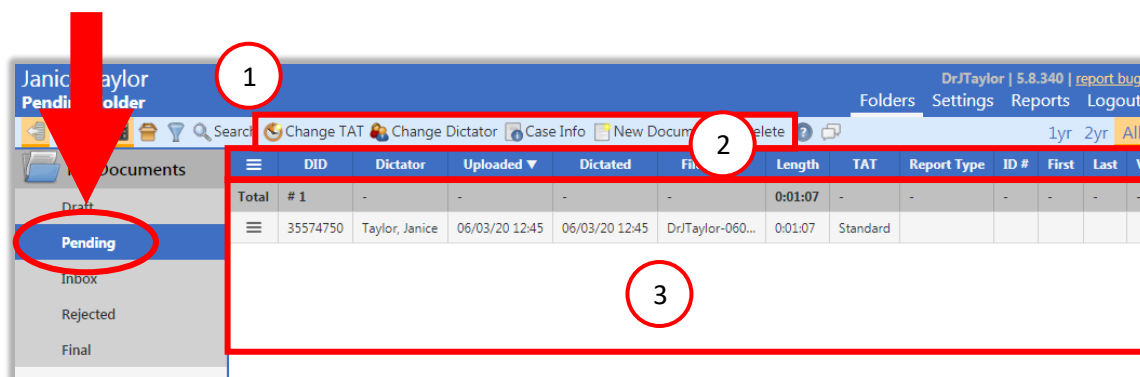
The File Display section displays the documents that are created by the Healthcare Provider within the Drafts folder.

File Action Menu

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

Pending

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.

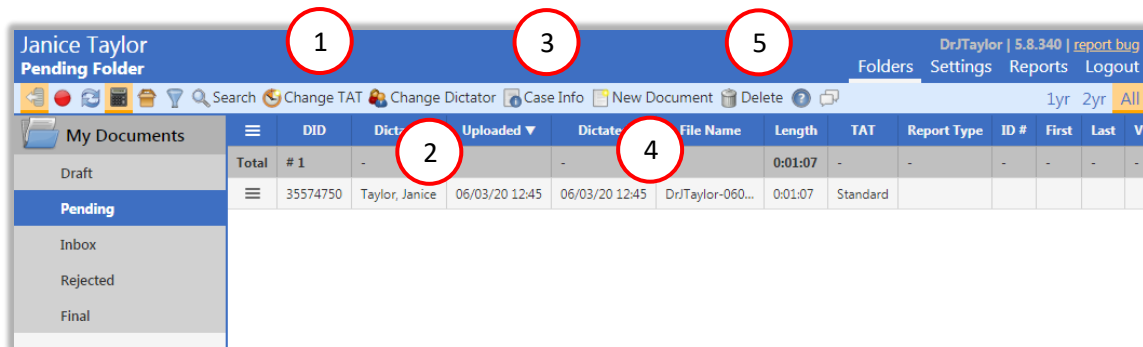


The Pending folder consists of three important areas:

- 1 **Folder Management Functions:** This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Inbox folder.
- 2 **Columns:** Inbox folder has several important columns available for the user and are explained in detail below.
- 3 **File Display:** The central section of the Portal displays the files for dictations.

Folder Management Functions

The first 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:

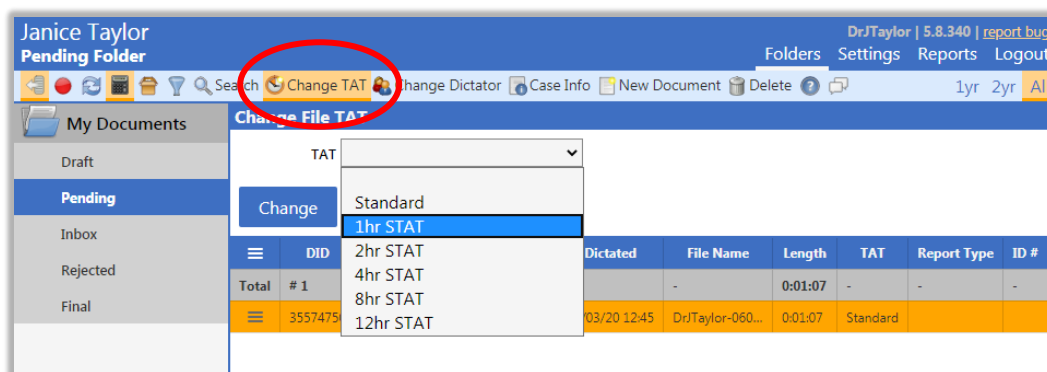


- 1 Change TAT: This feature also allows the user to change the turn-around time, or TAT, assigned to a dictation.

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

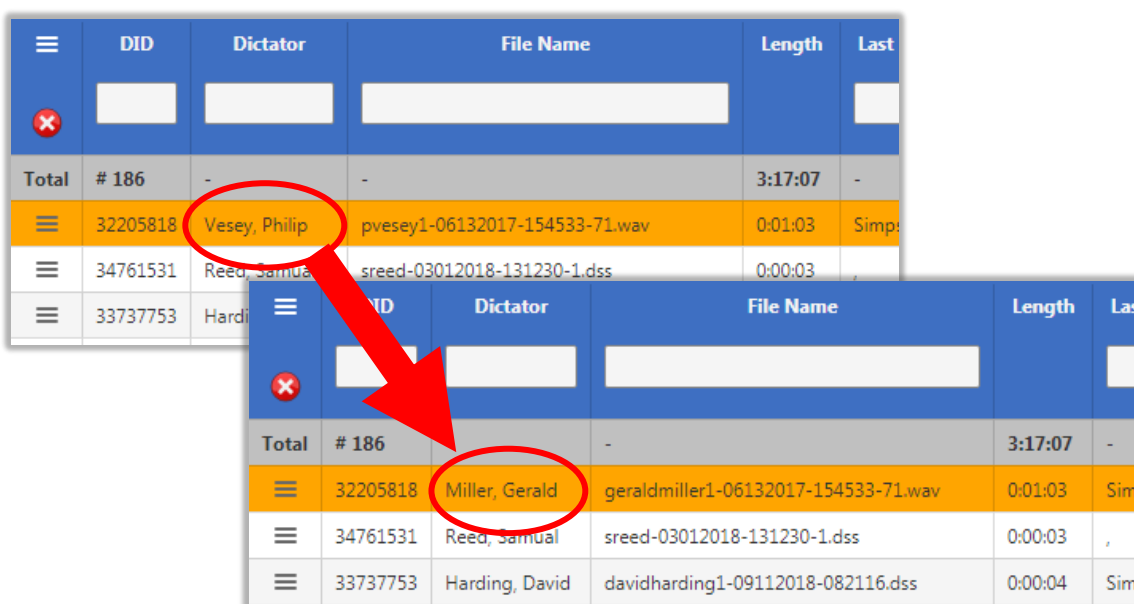
STAT times available are Standard, 1 hour, (1hr), 2-hour, 4-hour, 8-hour, and 12-hour. Unless otherwise configured in the “On Time” feature (by the Transcription Team), “Standard” is defined as 24 hours from the Upload date and time.

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



- 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.



	DID	Dictator	File Name	Length	Last
Total	# 186	-	-	3:17:07	-
	32205818	Vesey, Philip	pvesey1-06132017-154533-71.wav	0:01:03	Simple
	34761531	Reed, Samuel	sreed-03012018-131230-1.dss	0:00:03	,
	33737753	Hardi			

	DID	Dictator	File Name	Length	Last
Total	# 186	-	-	3:17:07	-
	32205818	Miller, Gerald	geraldmiller1-06132017-154533-71.wav	0:01:03	Sim
	34761531	Reed, Samuel	sreed-03012018-131230-1.dss	0:00:03	,
	33737753	Harding, David	davidharding1-09112018-082116.dss	0:00:04	Sim

- 3 Case Info: More information on Case Info can be found on page 19.
- 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.
- 4 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

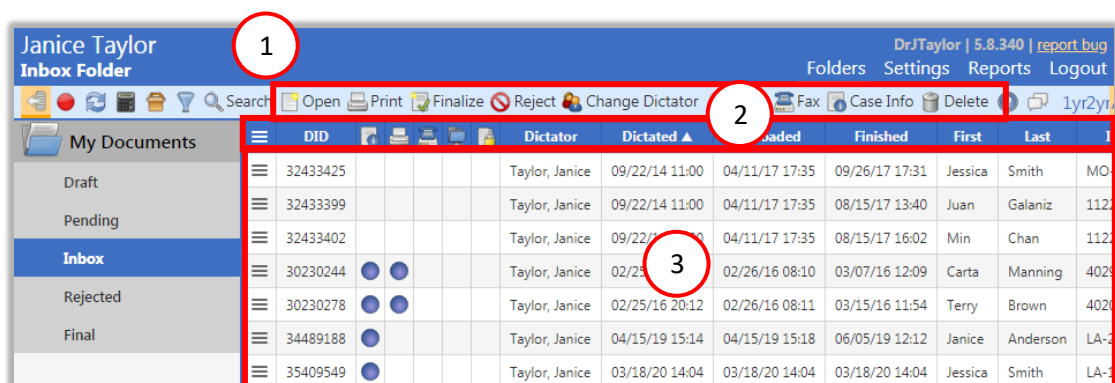
This section displays the dictations. All visible dictations in this folder are of the Pending status. For a detailed description of available file statuses and their meaning, see page 77.

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.

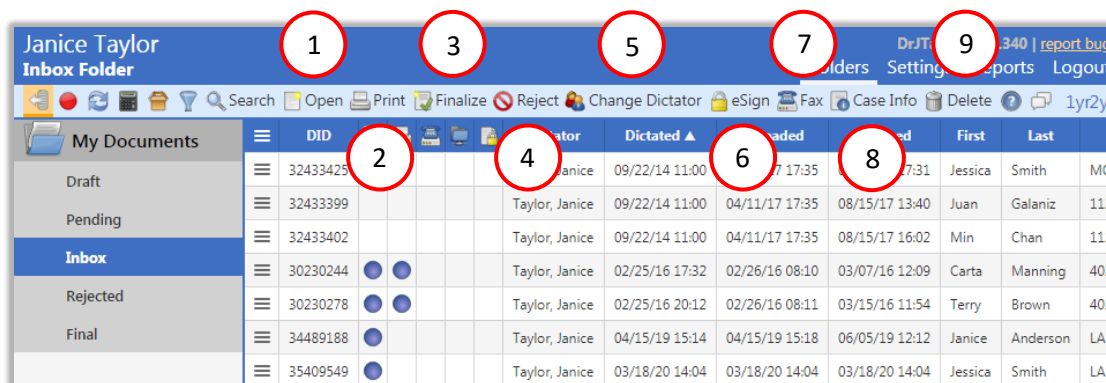


DID	Dictator	Dictated	Loaded	Finished	First	Last	
32433425	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	MO
32433399	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 13:40	Juan	Galaniz	112
32433402	Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	112
30230244	Taylor, Janice	02/25/16 08:10	02/26/16 08:10	03/07/16 12:09	Carta	Manning	402
30230278	Taylor, Janice	02/25/16 20:12	02/26/16 08:11	03/15/16 11:54	Terry	Brown	402
34489188	Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-2
35409549	Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-2

The Inbox folder consists of three important areas:

- 1 **Folder Management Functions:** This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Inbox folder.
- 2 **Columns:** Inbox folder has several important columns available for the user and are explained in detail below.
- 3 **File Display:** The central section of the Portal displays the files for dictations.

Folder Management Functions



	1	3	5	7	9
My Documents					
Draft					
Pending					
Inbox					
Rejected					
Final					

DID	2	4	6	8	First	Last
32433425					Jessica	Smith
32433399					Juan	Galaniz
32433402					Min	Chan
30230244					Carta	Manning
30230278					Terry	Brown
34489188					Janice	Anderson
35409549					Jessica	Smith

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:

- 1 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.
- 3 Finalize: This function finalizes the transcription and moves it to the Final folder. More information about the finalized status can be found on page 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.
- 5 Change Dictator: More information on Change Dictator can be found on page 29.
- 6 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

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

Confirm eSignature

Once e-signed, the document(s) can only be modified by you. Continue?

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:

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

- 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

1

2

Send Fax

Search to locate fax recipient(s)

Search

☐ include cover sheet

Add new fax recipient(s)

Add

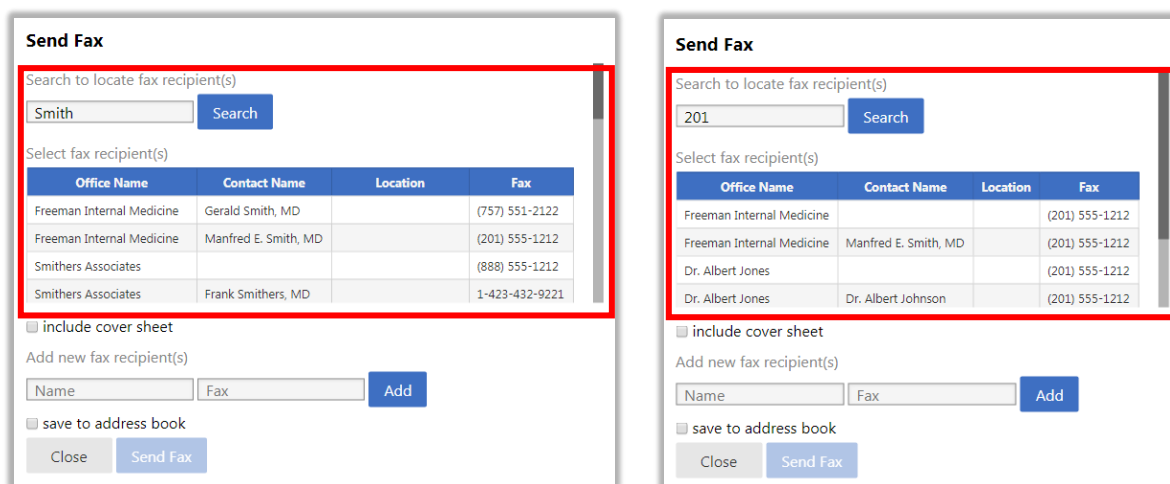
☐ save to address book

Close
Send Fax

1 Search on Fax Recipient

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

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



Send Fax

Search to locate fax recipient(s)

Smith Search

Select fax recipient(s)

Office Name	Contact Name	Location	Fax
Freeman Internal Medicine	Gerald Smith, MD		(757) 551-2122
Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1212
Smithers Associates			(888) 555-1212
Smithers Associates	Frank Smithers, MD		1-423-432-9221

☐ include cover sheet

Add new fax recipient(s)

Name Fax Add

☐ save to address book

Close Send Fax

Send Fax

Search to locate fax recipient(s)

201 Search

Select fax recipient(s)

Office Name	Contact Name	Location	Fax
Freeman Internal Medicine			(201) 555-1212
Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1212
Dr. Albert Jones			(201) 555-1212
Dr. Albert Jones	Dr. Albert Johnson		(201) 555-1212

☐ include cover sheet

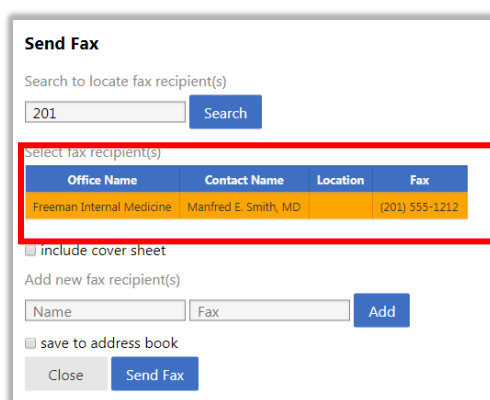
Add new fax recipient(s)

Name Fax Add

☐ save to address book

Close Send Fax

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



Send Fax

Search to locate fax recipient(s)

201 Search

Select fax recipient(s)

Office Name	Contact Name	Location	Fax
Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1212

☐ include cover sheet

Add new fax recipient(s)

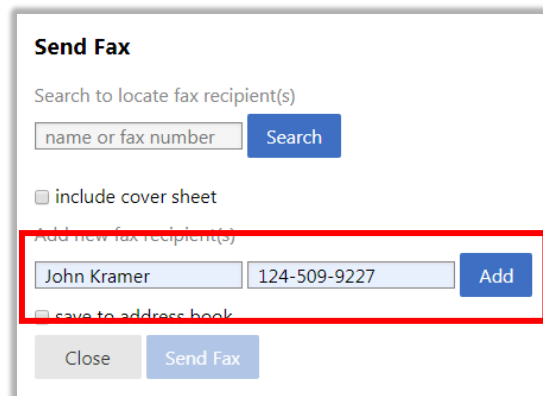
Name Fax Add

☐ save to address book

Close Send Fax

- 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

☐ include cover sheet

Add new fax recipient(s)

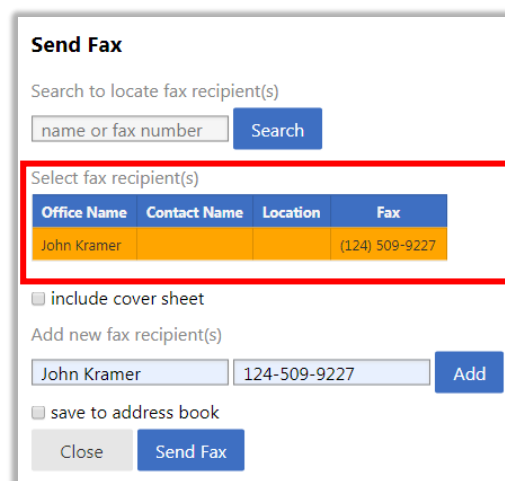
John Kramer 124-509-9227

☐ save to address book

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 locate fax recipient(s)

name or fax number

Select fax recipient(s)

Office Name	Contact Name	Location	Fax
John Kramer			(124) 509-9227

☐ include cover sheet

Add new fax recipient(s)

John Kramer 124-509-9227

☐ save to address book

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

Send Fax

Search to locate fax recipient(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 Fax

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.

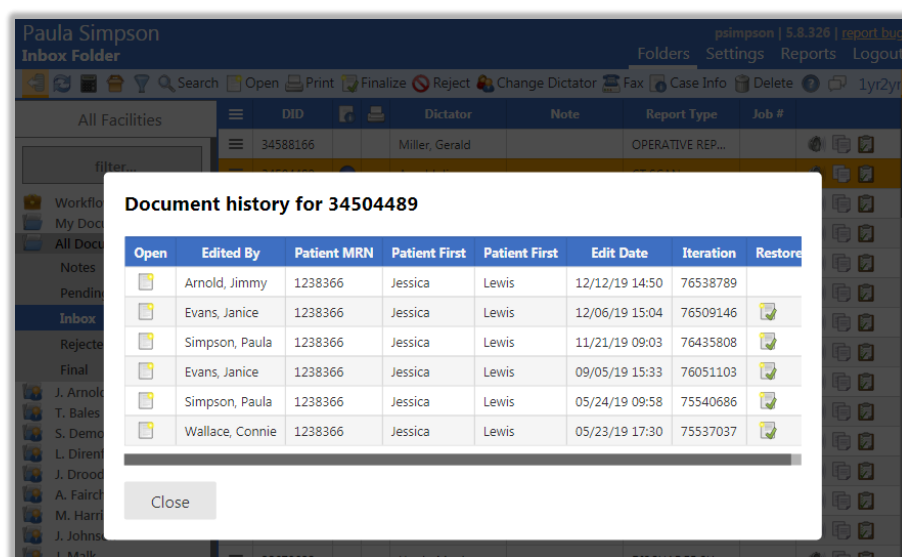
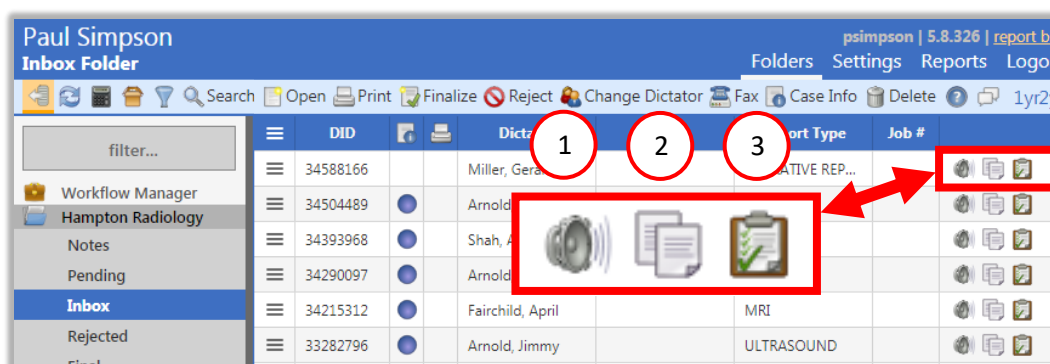
9 Delete: This allows the user to delete dictations and transcriptions from the workflow. For more information about deleting, please see page 25.

Columns

All available columns their descriptions:

Actions: This column contains three icons:

- 1 Play Audio: Clicking on the “Play Audio” icon downloads the audio file to the computer and plays it to the computer’ default audio player.
- 2 Document History: Clicking on the “Document History” icon opens a pop up window that shows all iterations of the transcribed documents for the transcription.
- 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).



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.

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

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

Dictated Date: This is the date and time of dictation. On phone dictations, the date and time is when the 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.

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

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

DOB: 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.

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

File Name
jarnold-12182019-123801.wav

“jarnold” – 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.

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

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

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

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

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

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

Location: For facilities using multiple locations.

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

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

On Time: This column displays if the transcription was delivered to the 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.

Late - 524.94 Days
On Time - 0 Days Early

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

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

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

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

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

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

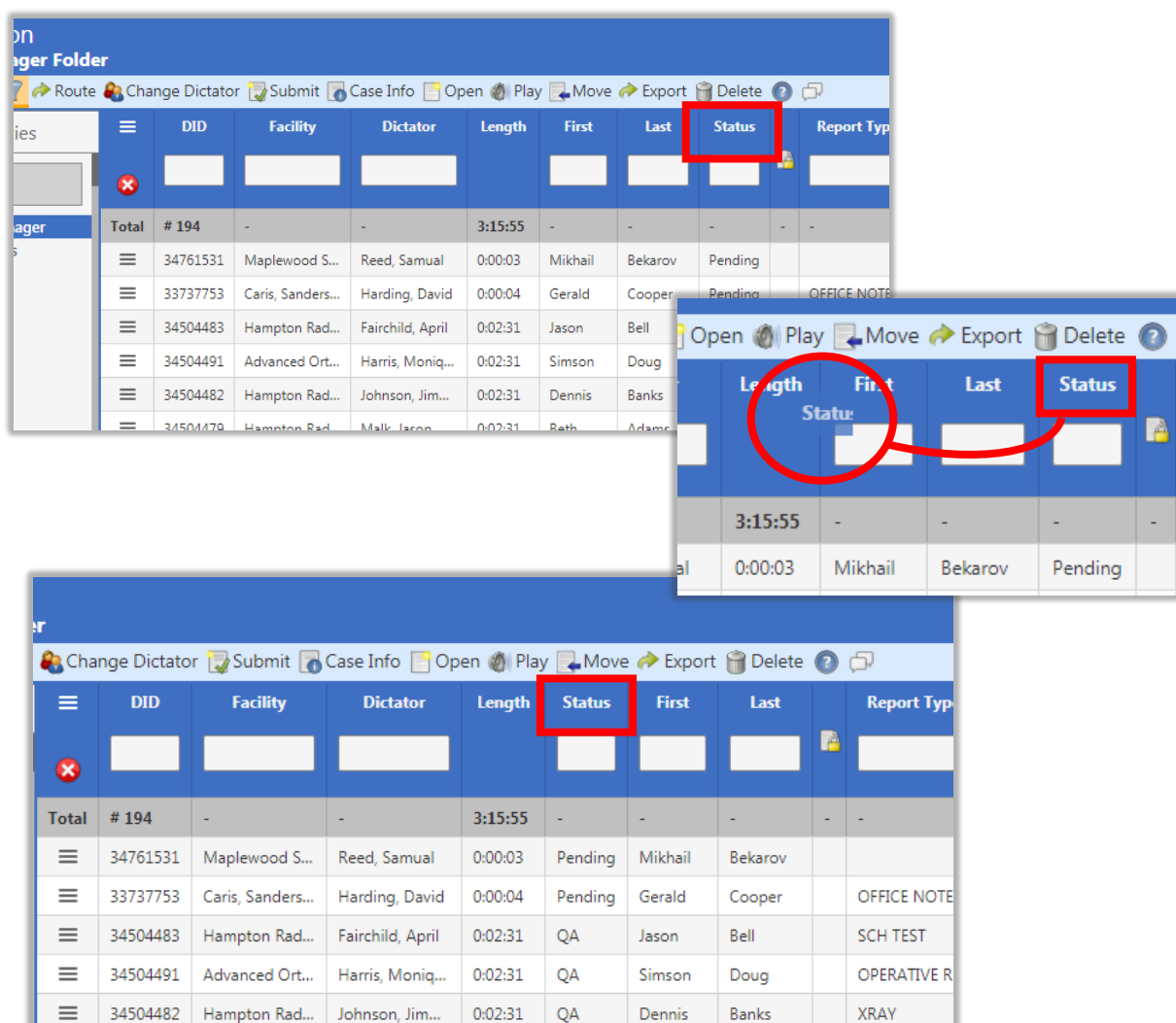
Upload Date and Time: this column displays the date and time when dictations upload into the database.

Column Management

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

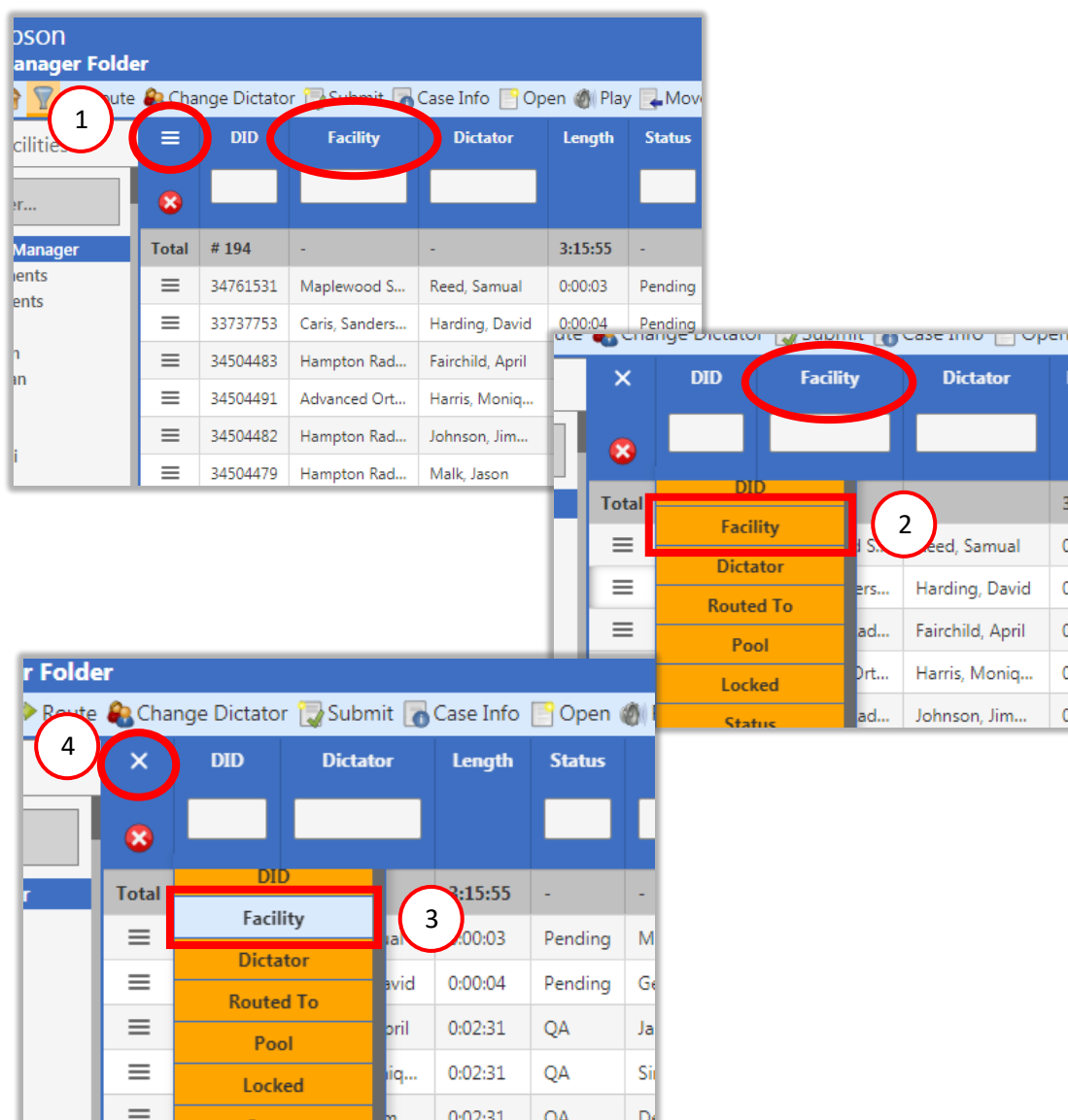
Rearranging

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



Show/Hide

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



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 | 5.8.326 | report bug

Workflow Manager Folder

Folders Settings Reports Logout

Route Change Dictator Submit Case Info Open Play Move Export Delete ? 1yr 2yr All

All Facilities

filter...

Workflow Manager

- My Documents
- All Documents
- M. Abbott
- S. Abraham
- S. Ackerman
- N. Adair
- A. Ahmed
- N. Ahmedli
- C. Aiken
- A. Albers
- K. Alfaro
- C. Alley
- C. Ames
- W. Andersen
- P. Andolina
- S. Andrew

	DID	Dictator	Length	Status	First	Last	TAT	Report Type	Last Modified
Total	# 199	-	3:18:48	-	-	-	-	-	-
	34761531	Reed, Samuel	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Paula
	34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard		Bales, Zoey
	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
	34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard	CT SCAN	Simpson, Paula
	34504491	Harris, Moniq...	0:02:31	QA	Simson	Doug	1hr STAT	OPERATIVE R...	Bales, Zoey
	34504482	Johnson, Jim...	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
	34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Paula
	34504604	Harris, Moniq...	0:02:21	QA	Nancy	Comstock	Standard	DISCHARGE S...	Bales, Zoey
	34504629	Harris, Moniq...	0:00:48	QA	Greg	Jones	Standard	OPERATIVE R...	Wallace, Con...
	34512978	Bales, Lowen	0:00:00	QA	Quinn	Bales	Standard	Blank Template	Bales, Zoey

The TAT column header in ascending sort:

Paula Simpson | 5.8.326 | report bug

Workflow Manager Folder

Folders Settings Reports Logout

Route Change Dictator Submit Case Info Open Play Move Export Delete ? 1yr 2yr All

All Facilities

filter...

Workflow Manager

- My Documents
- All Documents
- M. Abbott
- S. Abraham
- S. Ackerman
- N. Adair
- A. Ahmed
- N. Ahmedli
- C. Aiken
- A. Albers
- K. Alfaro
- C. Alley
- C. Ames
- W. Andersen
- P. Andolina
- S. Andrew
- N. Angell
- W. Angulo

	DID	Dictator	Length	Status	First	Last	TAT ▲	Report Type	Last Modified
Total	# 198	-	3:18:36	-	-	-	-	-	-
	34504491	Harris, Moniq...	0:02:31	QA	Simson	Doug	1hr STAT	OPERATIVE R...	Bales, Zoey
	35003347	Arnold, Jimmy	0:00:12	Pending	Jeremy	Hobson	1hr STAT		
	35022561	Bales, Lowen	0:00:02	QA	Allison	Smith	1hr STAT	A	Bales, Zoey
	34761531	Reed, Samuel	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Paula
	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT		
	34504482	Johnson, Jim...	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
	34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Paula
	34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard		Bales, Zoey
	34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard	CT SCAN	Simpson, Paula
	34504604	Harris, Moniq...	0:02:21	QA	Nancy	Comstock	Standard	DISCHARGE S...	Bales, Zoey

The TAT column header in descending sort:

Paula Simpson | 5.8.326 | [report bug](#)

Workflow Manager Folder Folders Settings Reports Logout

Route Change Dictator Submit Case Info Open Play Move Export Delete 1yr 2yr All

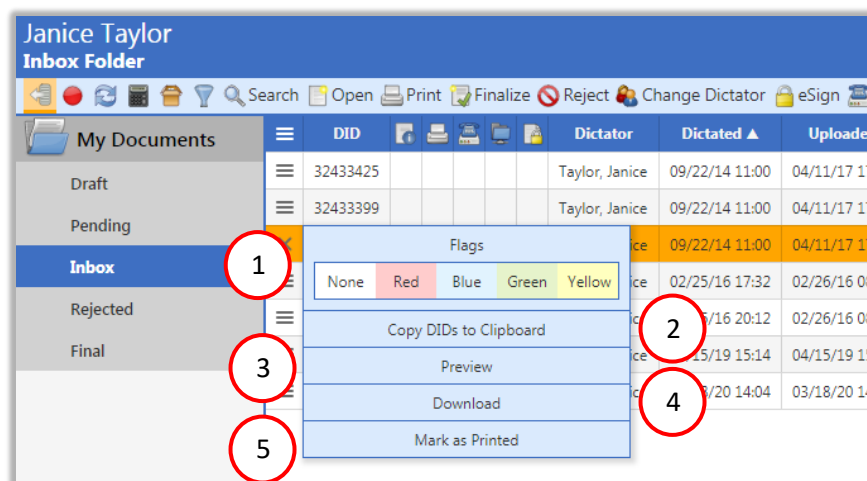
All Facilities	DID	Dictator	Length	Status	First	Last	TAT ▼	Report Type	Last Modif
filter...									
Workflow Manager	Total # 92	-	1:36:35	-	-	-	-	-	-
My Documents	35081472	Bales, Lowen	0:00:08	Pending			Standard		,
All Documents	35072519	Bales, Lowen	0:00:36	QA	Ralph	Smith	Standard	A	Bales, Zoey
M. Abbott	34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Pa
S. Abraham	34504482	Johnson, Jim...	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
S. Ackerman	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT		,
N. Adair	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
A. Ahmed	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Pa
N. Ahmedli	34761531	Reed, Samuel	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		,
C. Aiken	35147151	Bales, Traci	00:00:00	QA	Allison	Smith	1hr STAT	Blank Template	Bales, Zoey
A. Albers	35109384	Bales, Lowen	00:00:00	QA	Michael	Salyers	1hr STAT	A	Bales, Traci
K. Alfaro	35081496	Bales, Lowen	0:00:05	Pending			1hr STAT		,
C. Alley									
C. Ames									
W. Andersen									
P. Andolina									
S. Andrew									

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.



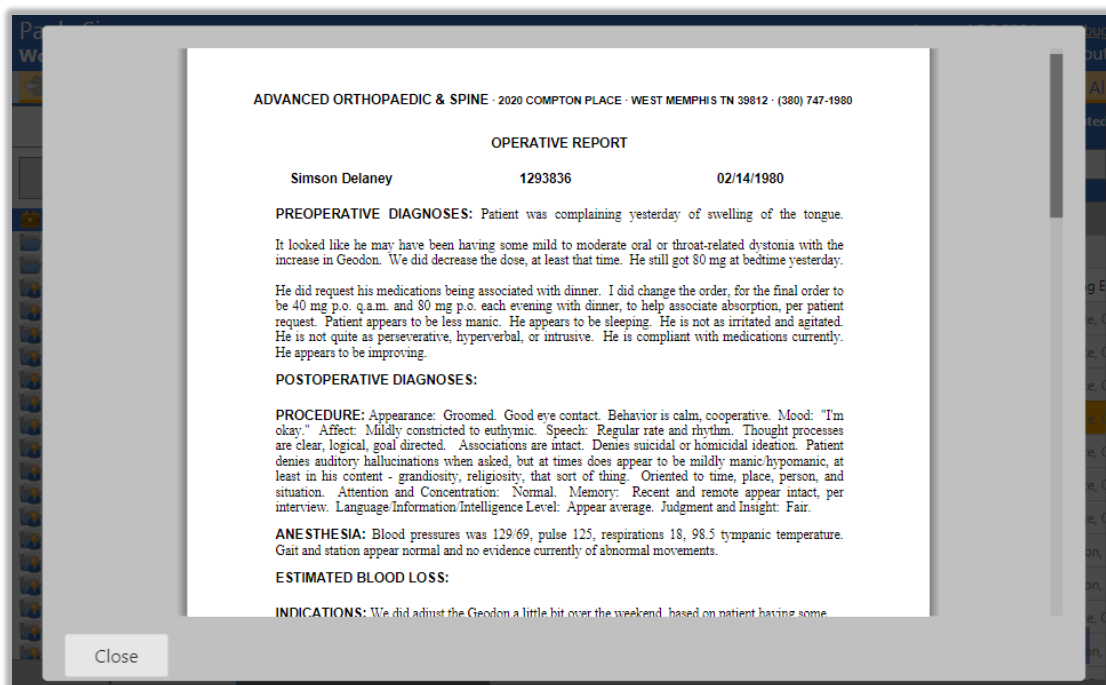
1 Flags: Rows in the “File Display” display in white by default. However, WebChartMD allows users to highlight rows in one of four colors for workflow reasons of the user’s design. To change the files from one color to another, select the dictation (or multiple dictations, using the control or shift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

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

- 2 Copy DID 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 DID to Clipboard”. Transfer copied DID numbers using Paste (control-P).

	DID	Dictator	Length	Status	First	Last
Total	# 198	-	3			
	34761531	Reed, Samuel	0			
	33737753	Harding, David	0			
	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.



4

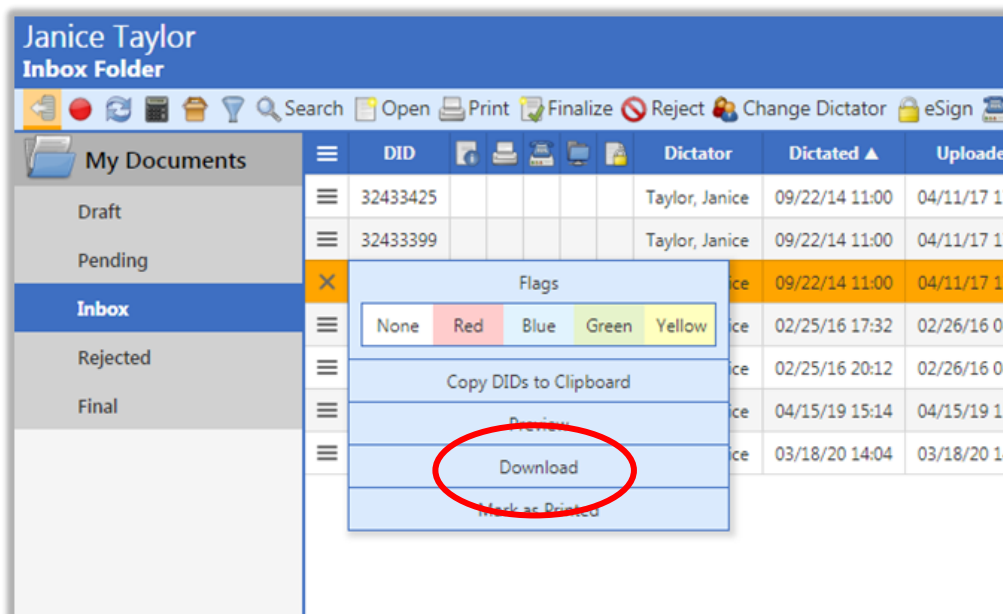
Download: This feature allows the user to download the transcribed document(s) to their computer as a .doc file. To download, the user clicks on the "Download" option on the Row Action Menu.

Setup:

The downloading process can be setup with these easy steps:

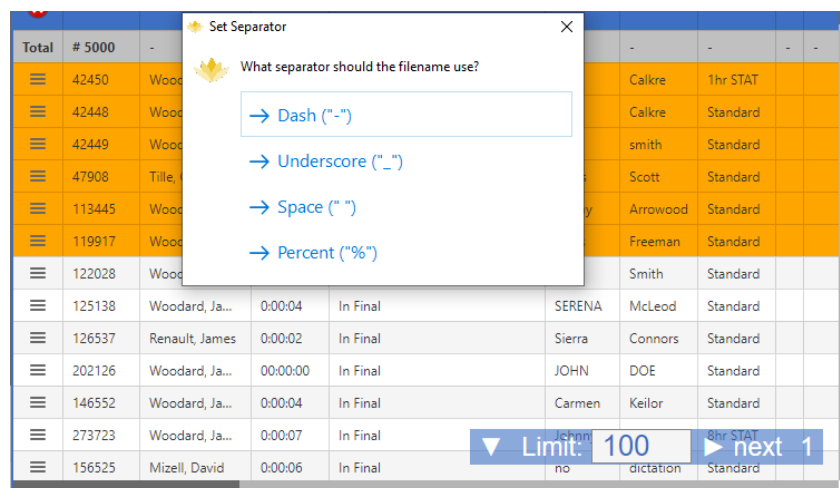
Step 1: Select file(s) to download

The user selects a single or multiple files and then clicks on the "Download" option of the "File Action Menu". This initiates the downloading process.



Step 2: Create the desired filename format

After pressing “Download” in the File Action Menu, the user is prompted to select the desired separator to be used in the filename.



Four options are available:

- Dash (“-“): This creates the file name using the dash between words.
Example: Andrew-Smith-Jessica-Johnson.doc
- Underscore (“_“): This creates the file name using the underscore between words.
Example: Andrew_Smith_Jessica_Johnson.doc

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

Step 3: Select the desired file name components.

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

- DID: Inserts the DID number.
- Practice: Inserts the Facility name
- DOV (MMDDYYYY): Inserts the date of visit for the dictation without using separators.
- DOV (MM-DD-YYYY): Inserts the date of visit for the dictation with separators.
- Provider ID: Inserts the 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:

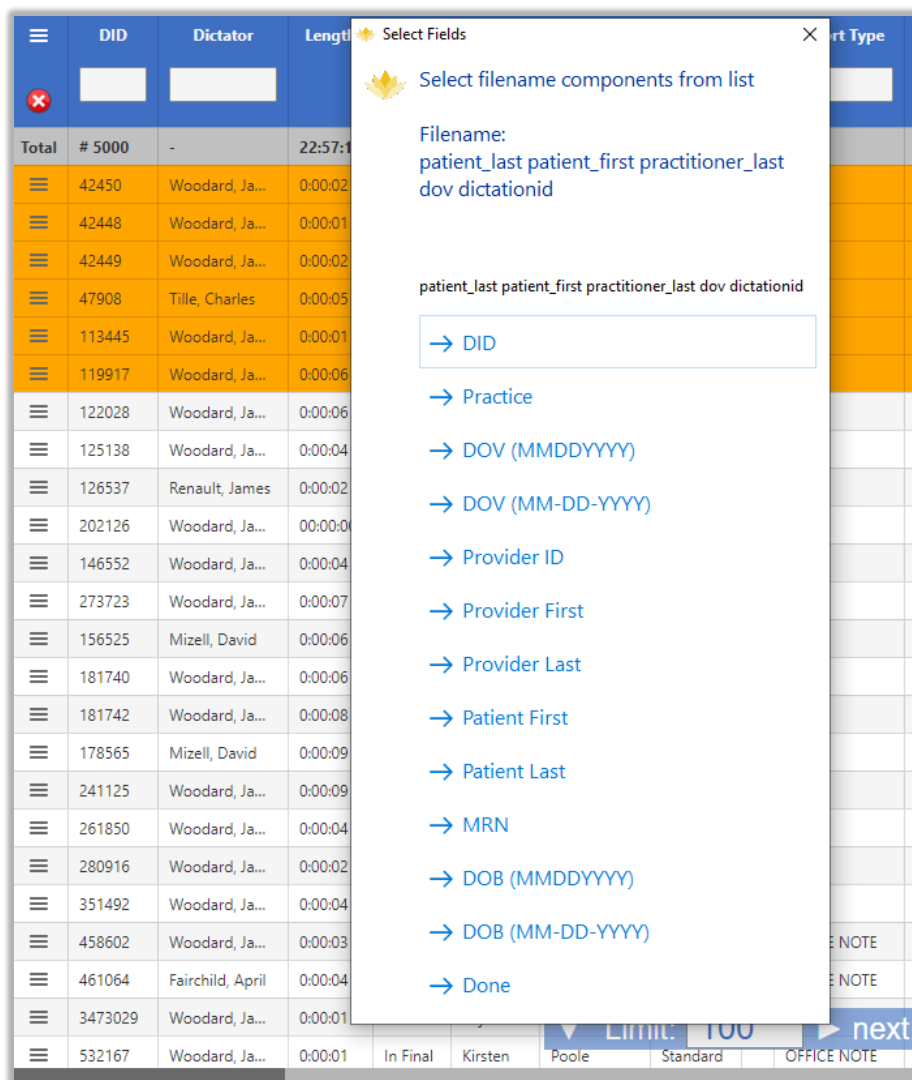
DID-Practice-MRN-Provider_Last, which would populate with data as:

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).



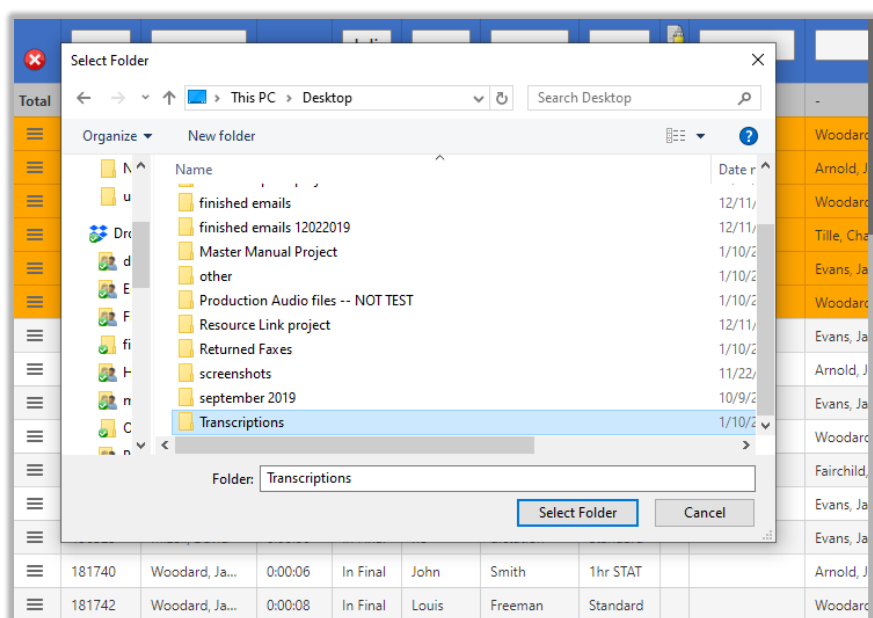
Step 4: Completing the filename

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.

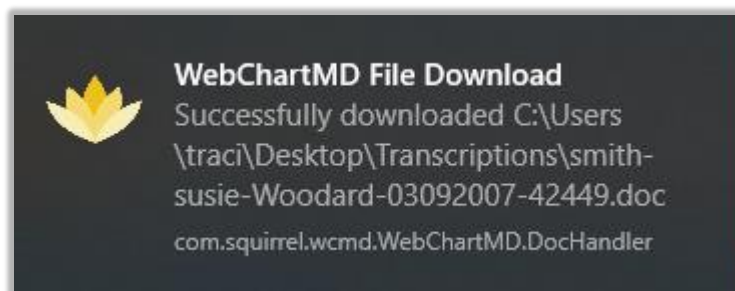
Step 5: Choose download location

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”.

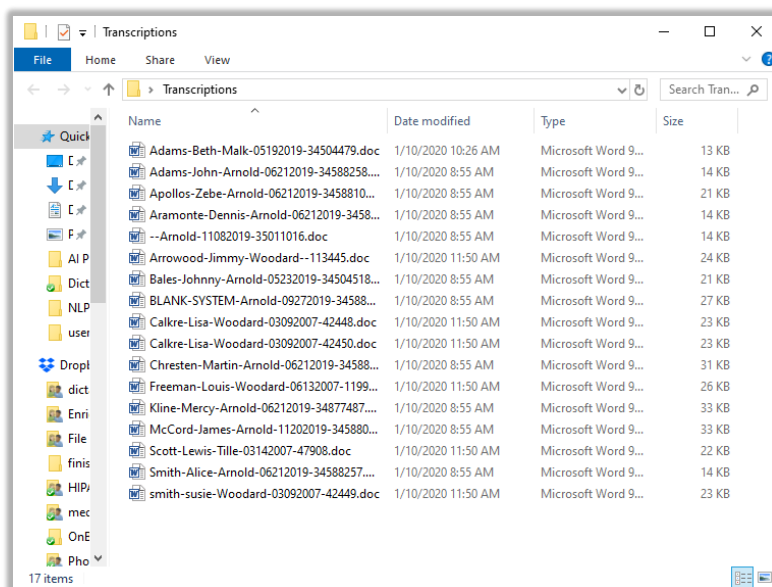


Step 6: Download completion

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.



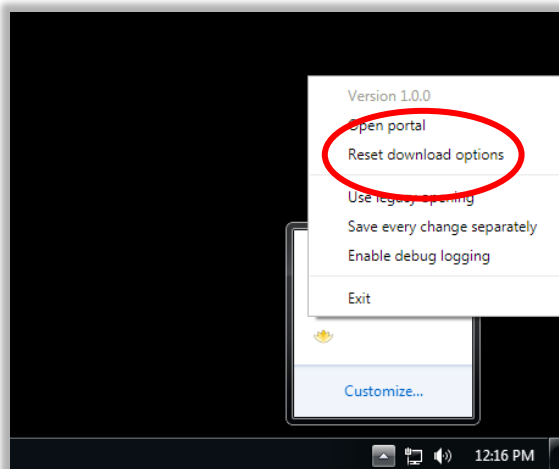
Download confirmation popup message



The transcribed documents downloaded to the selected location.

Notes:

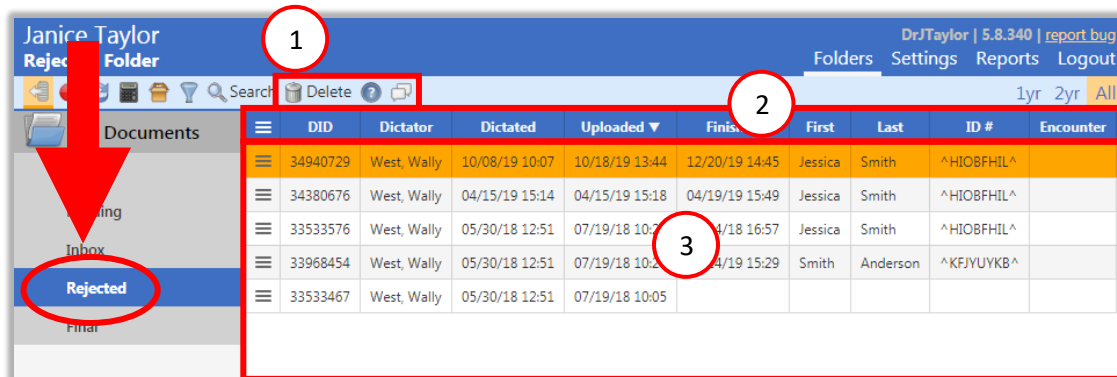
1. After the initial set-up is done, the system remembers the configuration and uses it for any subsequent downloads.
2. The “Reset download options” in the Doc Handler allows the user to reset all downloading settings to create new download settings. .



- 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

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



The Rejected folder consists of three important areas:

- 1 **Folder Management Functions:** This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Rejected folder.
- 2 **Columns:** Rejected folder has several important columns available for the user.
- 3 **File Display:** The central section of the Portal displays the rejected transcriptions.

Folder Management Functions

The first 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:

Rejection Reason: 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

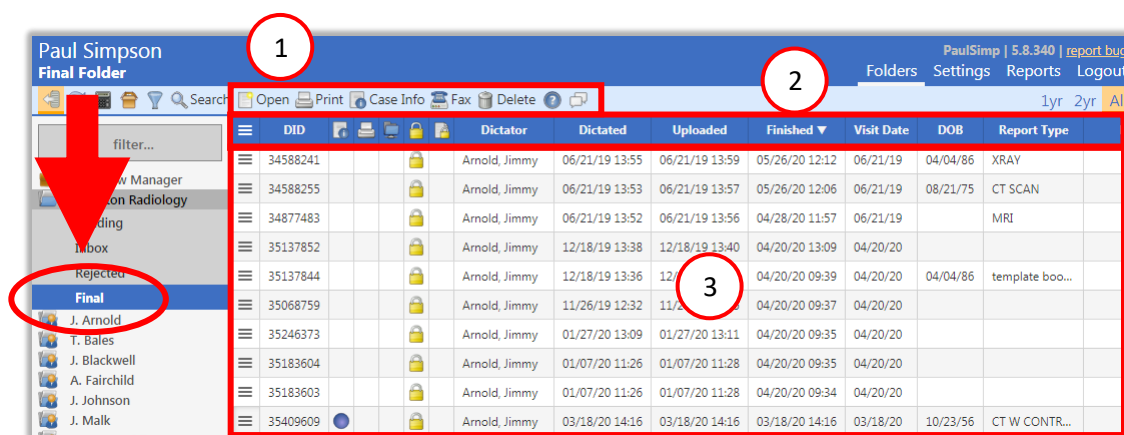
This section displays transcriptions that have been rejected by the Healthcare Provider. All visible transcriptions in this folder are of the Rejected status. For a detailed description of available file statuses and their meaning, see page 77.

File Action Menu

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

Final

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.



The Final folder consists of three important areas:

- 1 **Folder Management Functions:** This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Final folder.
- 2 **Columns:** Rejected folder has several important columns available for the user.
- 3 **File Display:** The central section of the Portal displays the finalized transcriptions.

Folder Management Functions






The first 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:

eSigned: 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 signing.

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

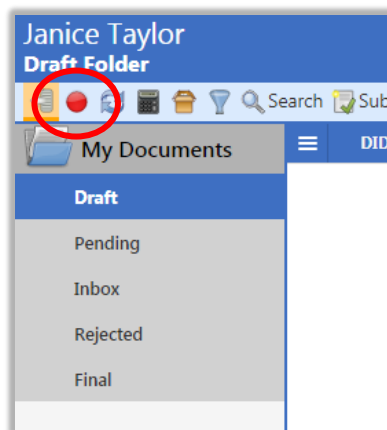
Using Dictate to record audio

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

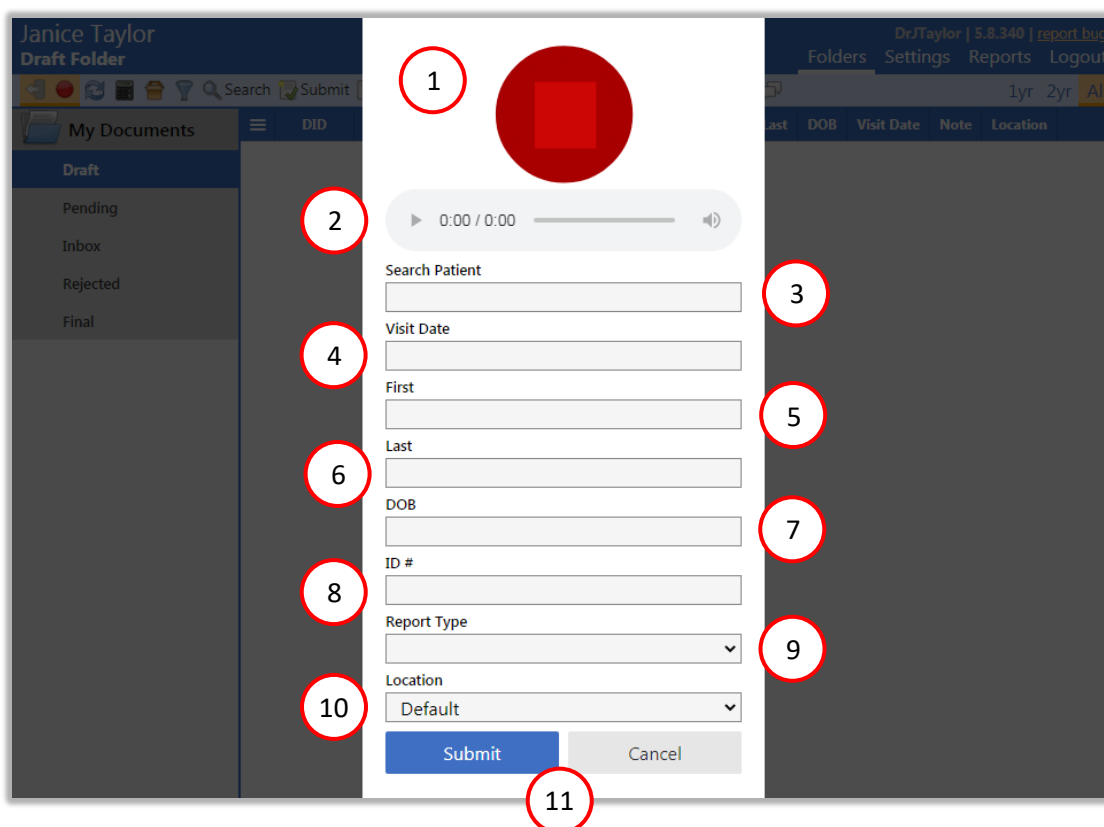
Please note: WebChartMD's front-end audio recording workflow utilizes hardware already purchased and installed on the Healthcare Provider's computer. WebChartMD does not provide the front-end audio recording hardware.

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.



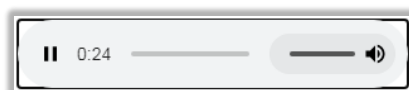
2. This brings up the recording interface.



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

2 Audio Track: This displays the length of recording.

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.

Search Patient

And

Page 1 [next >](#)

James Andrew [112210-01]
James Andrew [112210-01]
James Andrew [112210-01]
Anderson 032695 [^UOHDEULN^]
Janice Anderson [LA-28541]
Janice Anderson [LA-285412]
Kishen Gandhi [LO-461881]
Andrew Jacobson [79828]
Anderson Smith [^XLGFRUGT^]
Andrew Vincent [6382522]

Search Patient

and

[< prev](#) Page 2

Smith Anderson [^KFJYUYKB^]
Andrew Johnston [^WNJZXSTM^]

- 4 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.

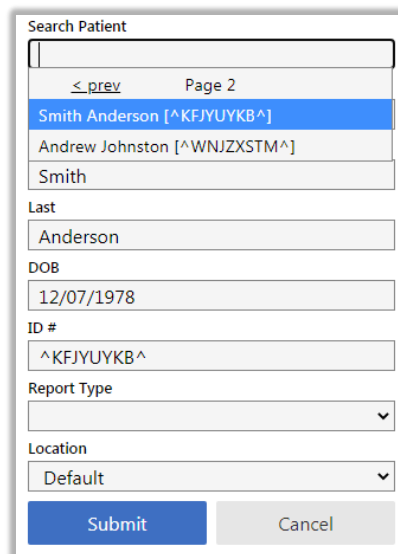
Visit Date

June 2020

June 2020

Previous Month				Next 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	1	2	3	4

- 5 First: This contains the first name of the patient.
- 6 Last: This contains the first name of the patient.
- 7 DOB: This contains the Date of birth of the patient.
- 8 ID #: This contains the MRN or identification number of the patient.



Search Patient

<_prev Page 2

Smith Anderson [^KFJYUYKB^]

Andrew Johnston [^WNJZXSTM^]

Smith

Last

Anderson

DOB

12/07/1978

ID #

^KFJYUYKB^

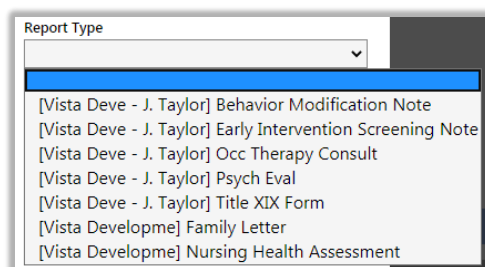
Report Type

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

- 10 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

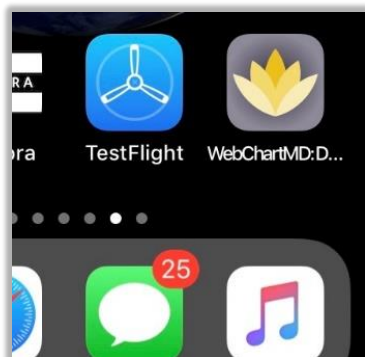
Healthcare Providers can use The WebChartMD Dictate and Review mobile app on an iPhone to dictate.

Installation of WebChartMD: Dictate and Review

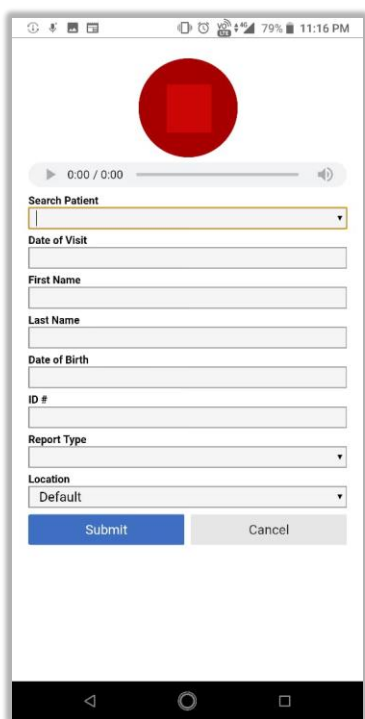


- The mobile app for WebChartMD is in the Apple App Store. Search for WebChartMD: Dictate and Review
- Download the app by clicking the 'Get' link in the app window (The screenshot provided is showing a cloud because the app has previously been downloaded)

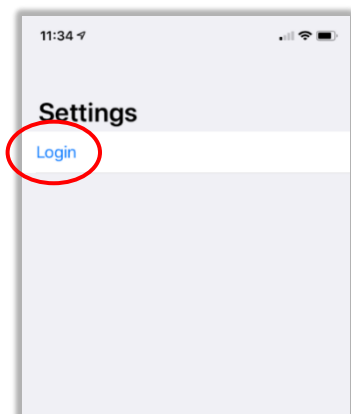
Set Up WebChartMD: Dictate and Review



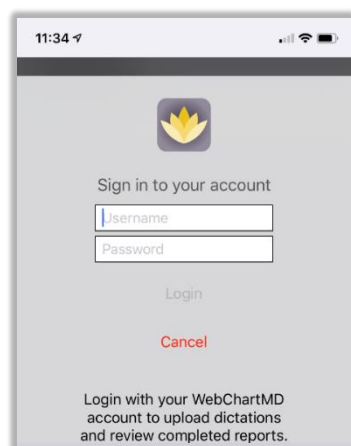
WebChartMD: Dictate and Review App by pressing on the Gray and Yellow Icon newly placed on your home screen



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.



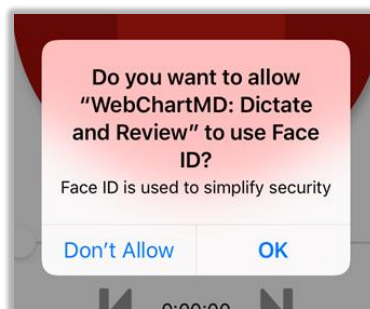
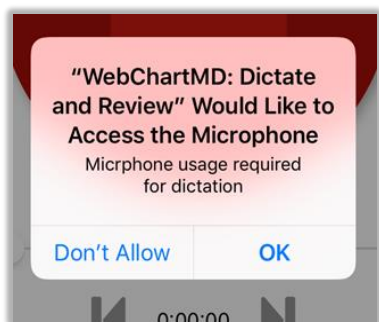
The Settings page will allow you to click the link for login.



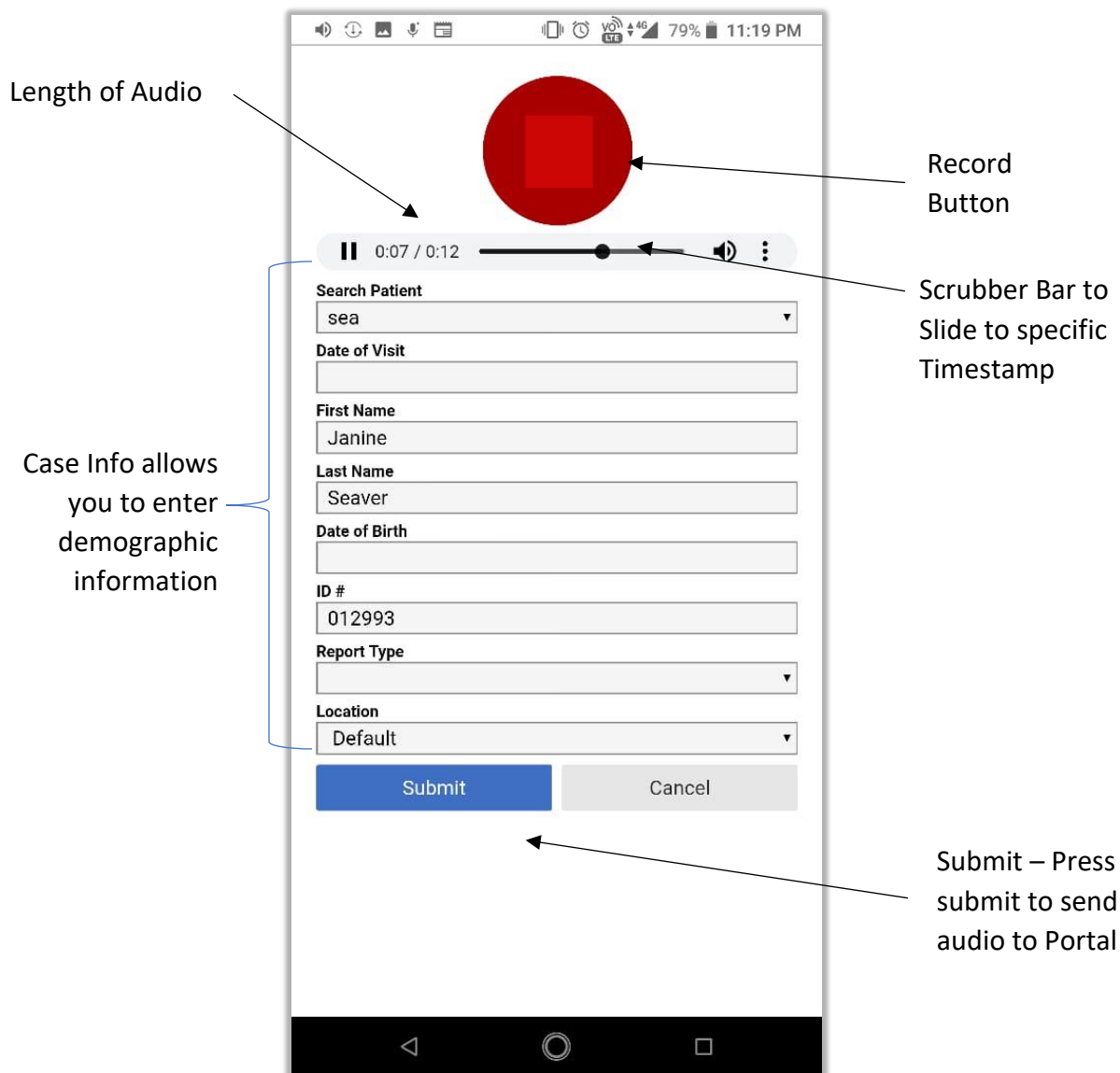
When the application opens go to settings > Login> then enter the same credentials you use to log into the WebChartMD Portal.

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.

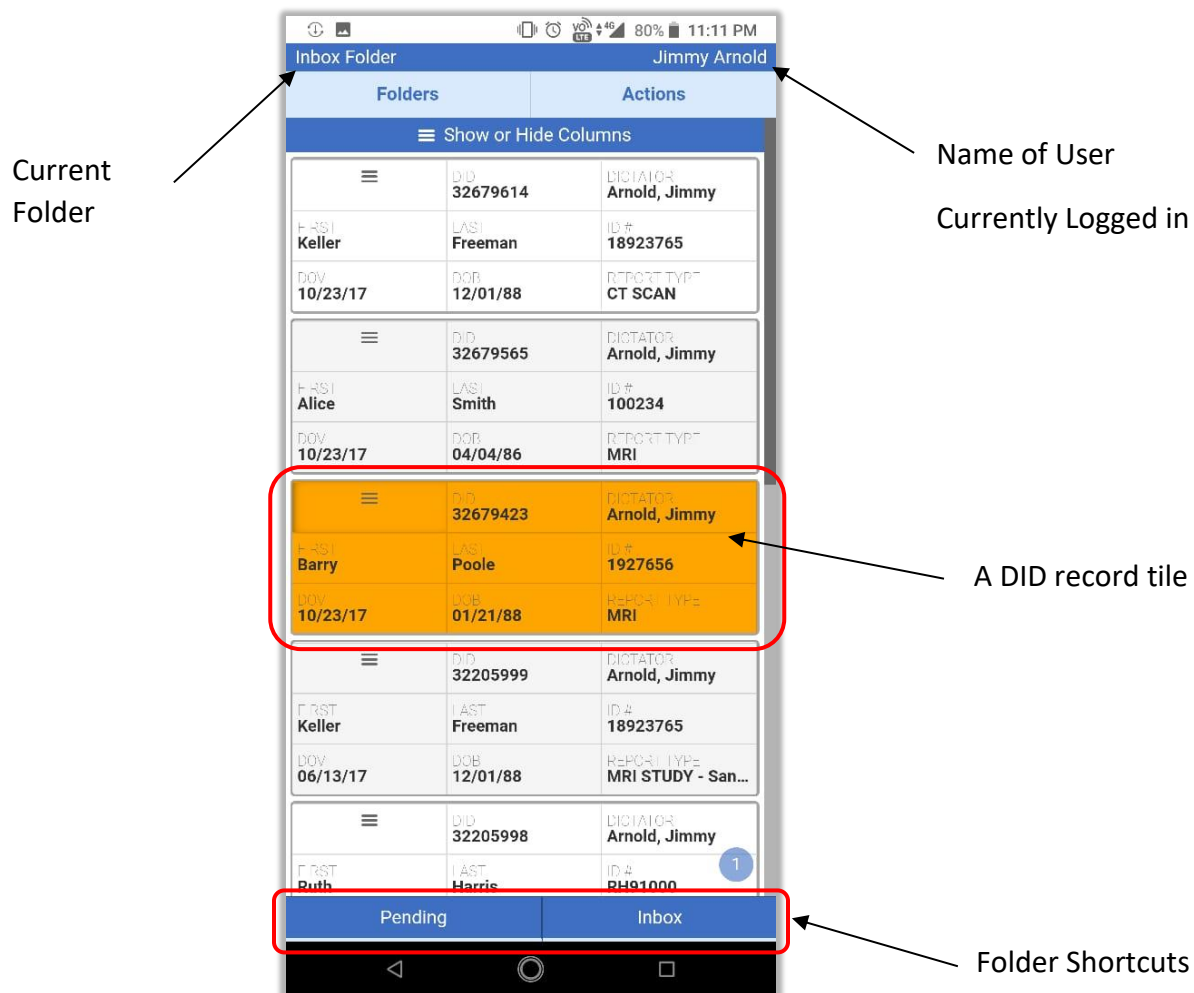


The Dictation Application

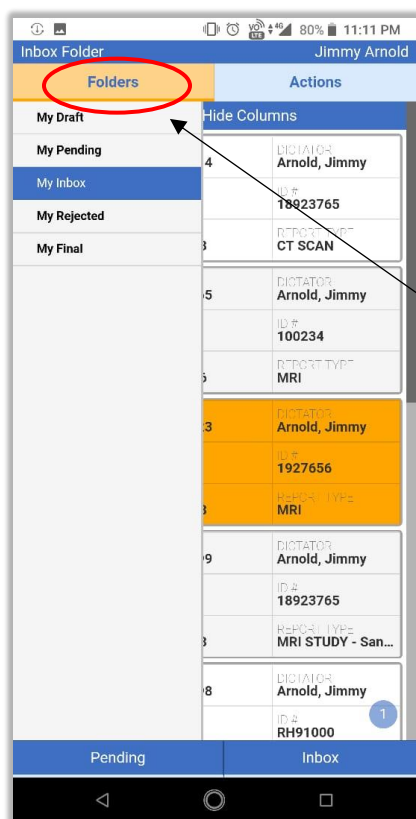


Mobile Portal – Care Provider

The Main Page / Initial Log in / The Folders View

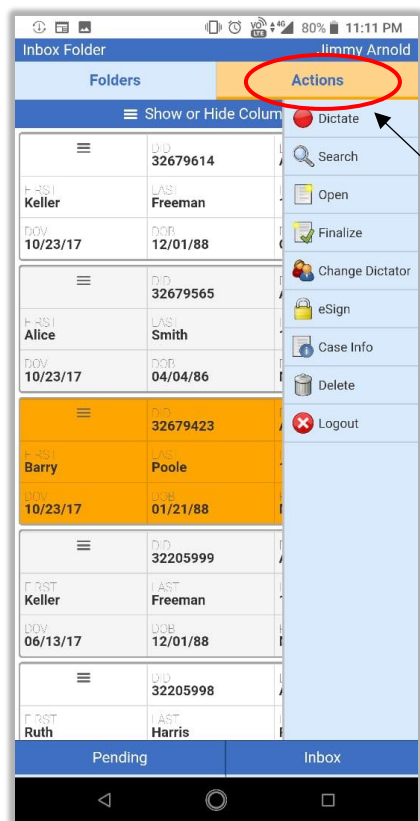


Switching Folders



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

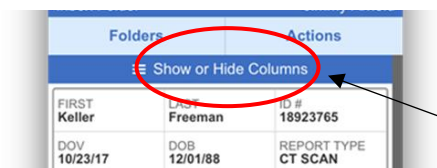
The Actions Pane



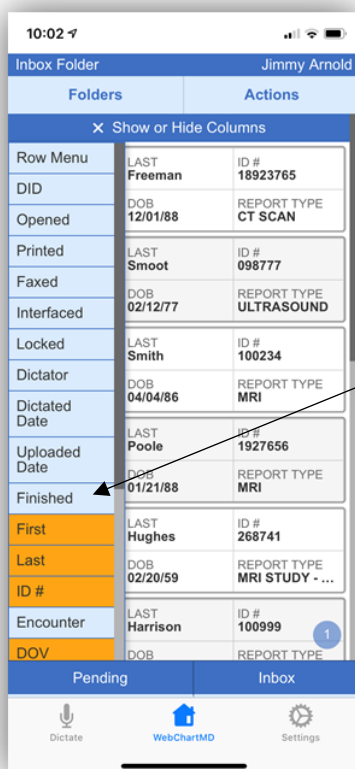
To make changes to the DID, select the DID first by tapping on it so it turns Orange.

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

Customizing the Information tile



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.

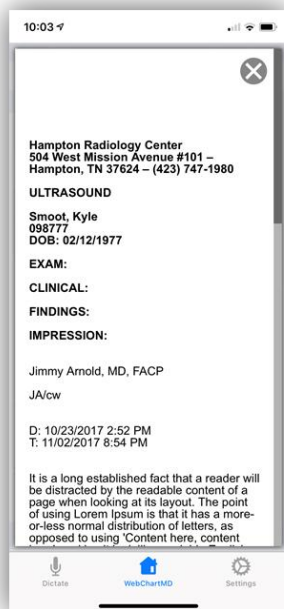
- Unselecting a block will remove it from its current position and shift the remaining tiles.
- Selecting a block (so it turns orange) will add that information at the next available spot in the tile (or create a new row if the current tile is full).

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.

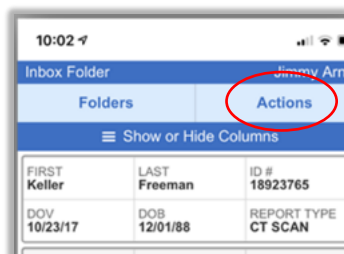
FIRST Alice	LAST Smith	ID # 100234
DOV 10/23/17	DOB 04/04/86	REPORT TYPE MRI
FIRST Keller 1	LAST Freeman 2	ID # 18923765 3
DOV 10/23/17 4	DOB 12/01/88 5	REPORT TYPE CT SCAN 6
FIRST Kyle	LAST Smoot	ID # 098777
DOV 10/23/17	DOB 02/12/77	REPORT TYPE ULTRASOUND

Opening Documents

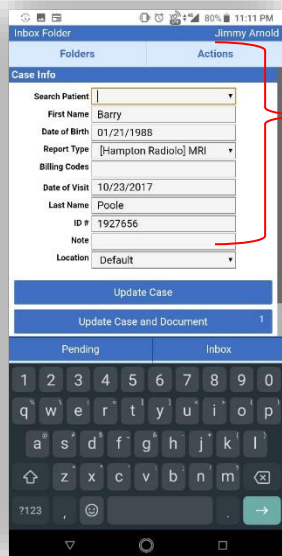


Upon double-tapping the DID tile, the Portal will open the document within an inbuilt pdf reader for the user to read.

Altering Case Info

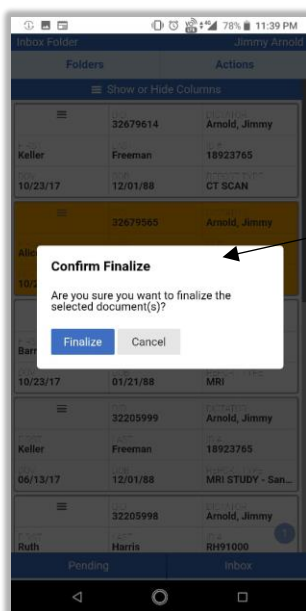
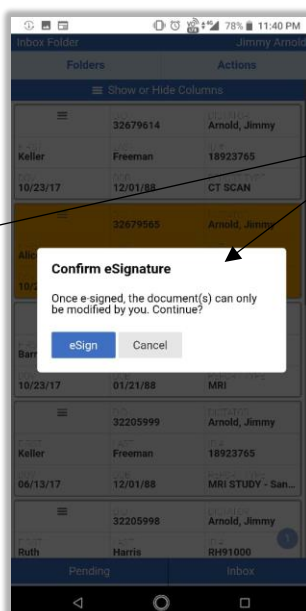


To update the Case Info of a dictation, select the DID tile so it turns orange, then tap on Actions and then Case Info.

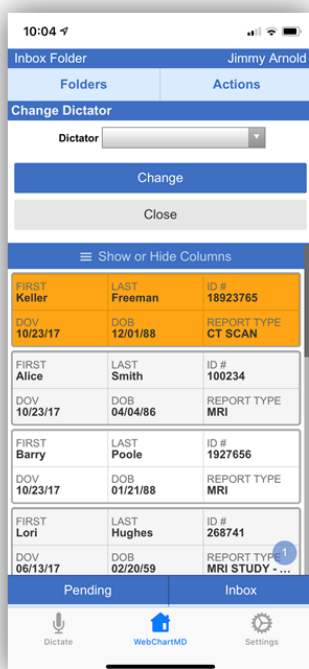


A new section will pop up, allowing for editing of the Demographics for the case info.

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

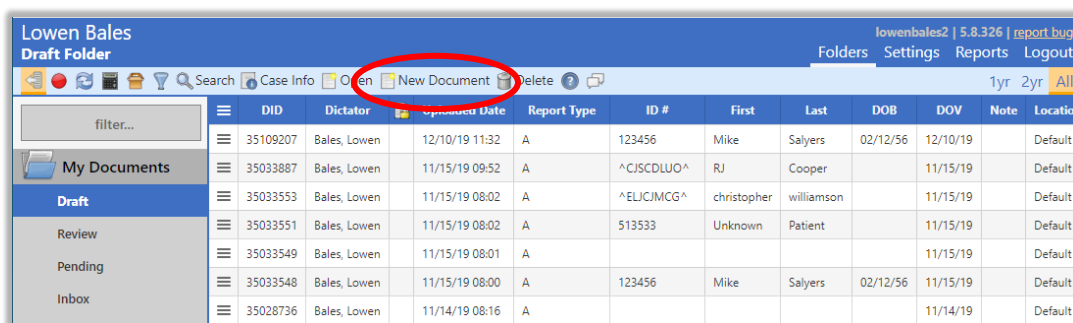
Using Dragon with WebChartMD

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

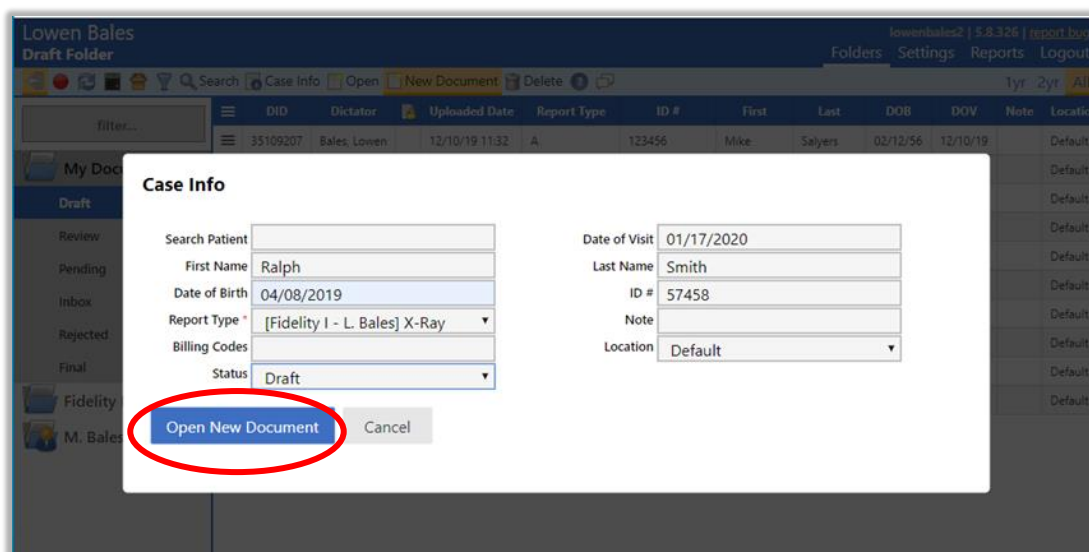
Please note: WebChartMD's front-end speech recognition workflow utilizes software already installed and purchased on the Healthcare Provider's computer. WebChartMD does not provide the front-end speech recognition software.

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

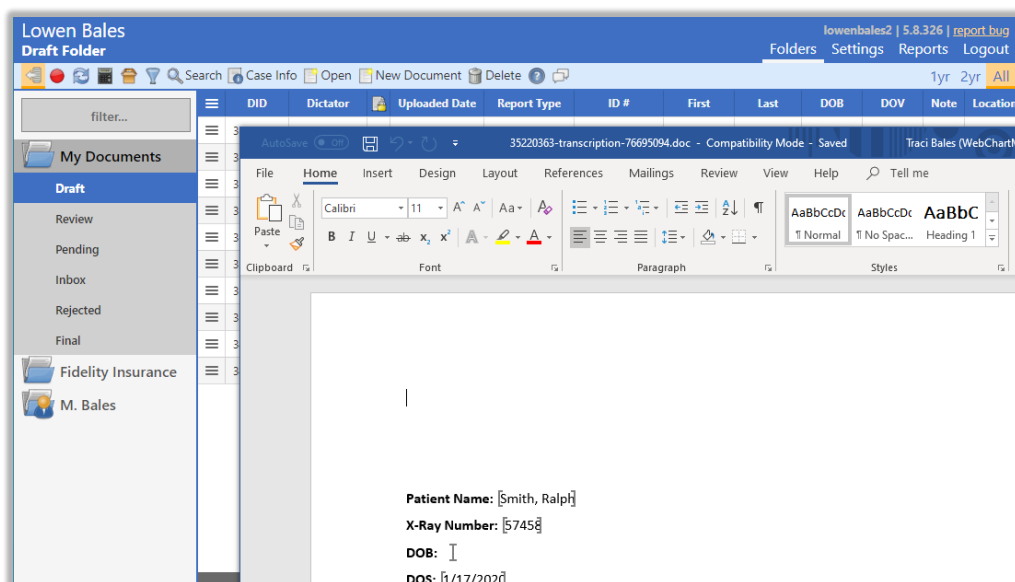
1. From the Draft folder, click the "New Document" button on the Folder Management toolbar.



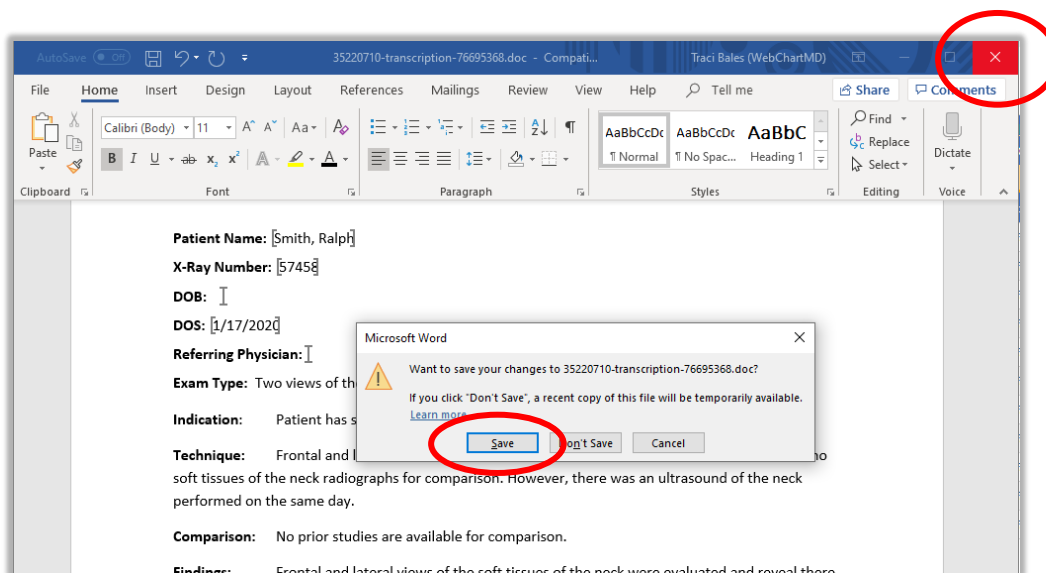
2. Click the "Case Info" window to enter demographics and make other selections relevant to the dictation.
 - a. Add patient information if desired (not required).
 - b. Search for the patient using the "Search Patient" field. Previously transcribed patients will present in the search box.
 - c. Select 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).



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



- 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.
- Once completed, the Healthcare Provider presses "Save" to save the completed document.
- Once saved and closed, the document will follow the routing rules selected in the "Status" dropdown as mentioned in 2.d above.



File Status

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

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

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

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

Finalized: 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.

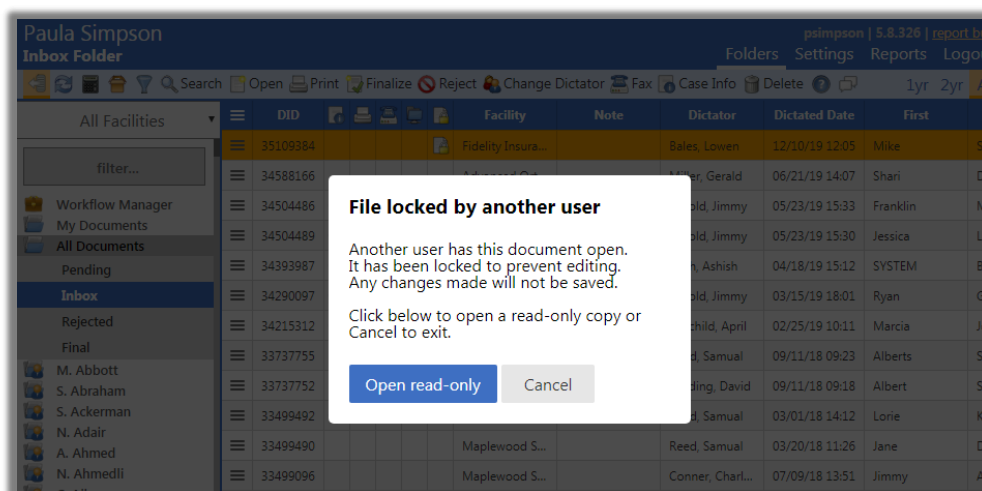
Deleted: this status means the dictation or transcription has been removed from the workflow and no longer accessible. Note – Documents can be taken out of the "Deleted" status by using the "Move" feature in the Workflow Manager by the Facility Administrator.

E-Signed: Transcriptions that the Healthcare Provider has electronically signed.

Document Locking

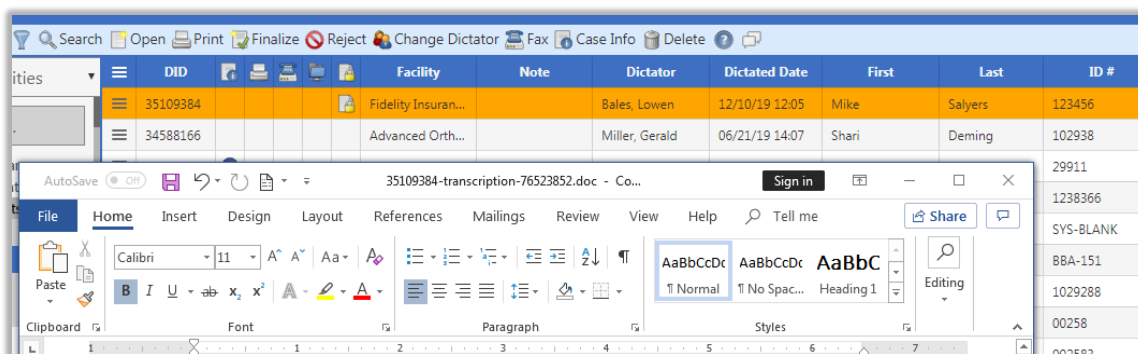
WebChartMD locks a document once opened by a user to prevent multiple users from accessing the document at the same time. Hovering over the “lock” icon on screen displays information about who is currently accessing the document, and the date/time of the access.

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.

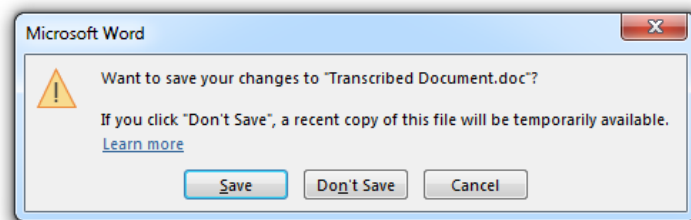


Edit

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



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



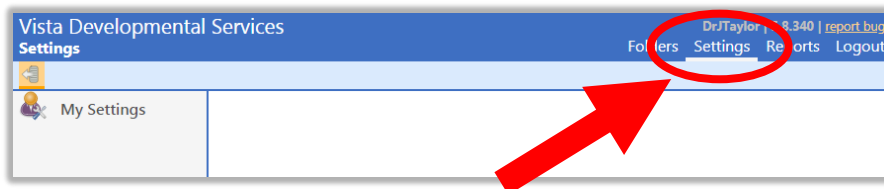
Interfacing

The Interface feature is part of a workflow created for interfacing transcriptions into electronic health record systems. For more information on creating custom interfaces, contact WebChartMD support. Please speak with the Facility Administrator for “Interface Re-export” feature.

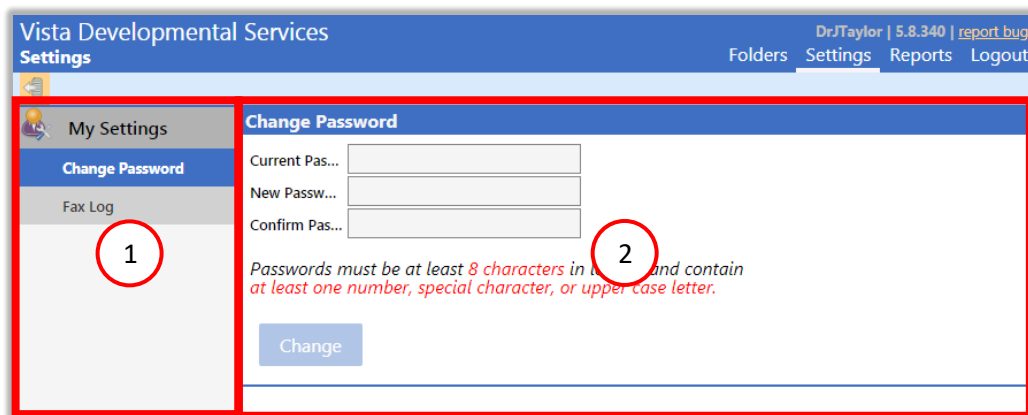
Settings View

Settings View Overview

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



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



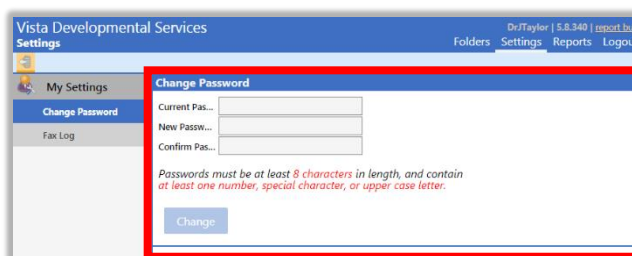
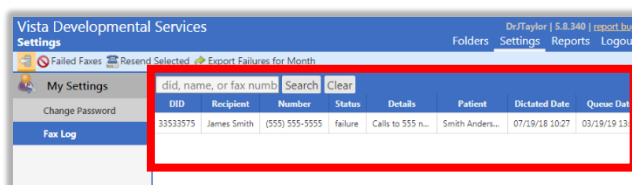
- 1 Settings Pane: This section displays different settings grouped into sections and subsections, providing the user with an ease of making changes.
- 2 User Section: This central section of the “Settings View” usually displays lists of users, both Transcription Team users and Facility users, to select 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

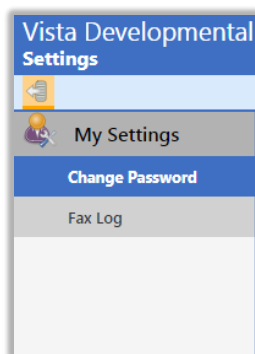
The central section of the Settings View area displays users as a selectable list. When selected, the individual settings available for that user loads into the Details Panel (explained next) on the right, allowing the Admin to change those settings. This section is shown in the next few images as examples:

DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Dat
33533575	James Smith	(555) 555-5555	failure	Calls to 555 n...	Smith Anders...	07/19/18 10:27	03/19/19 13

My Settings

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

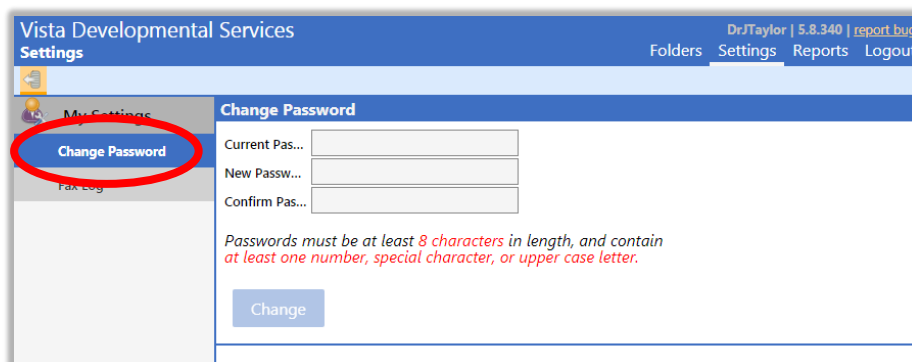


Change Password is used for password updating.

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.



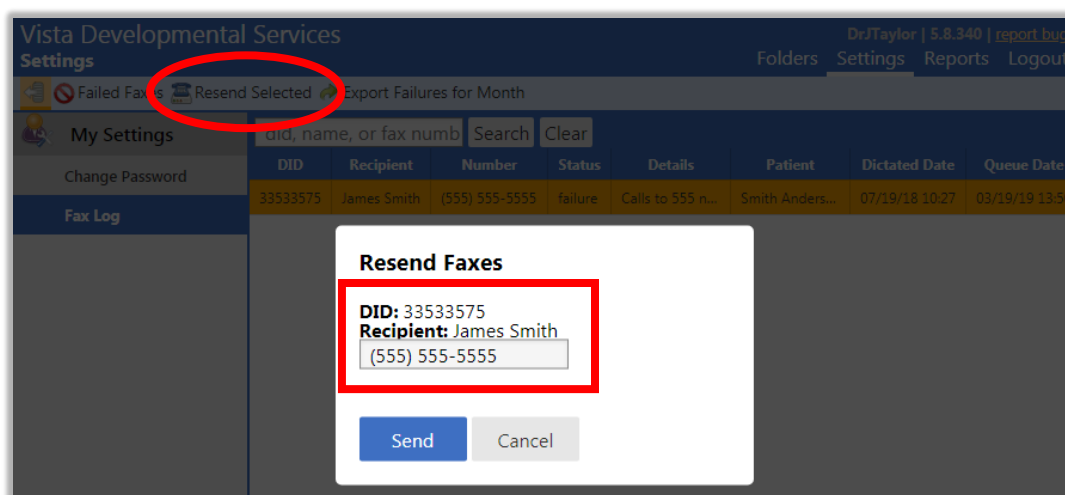
Fax Log

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

Failed Faxes

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

Resend Selected



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

1. Click the failed transcription item in the Details Screen.
2. Enter the corrected fax number into the field where indicated (above image) and press the “Send” button.

Export Failures for Month

This feature is currently disabled.

Fax Log Column Display

Columns displayed in the Fax Log and their meanings are:

Vista Developmental Services								
Settings			DrJTaylor 5.8.340 report bug					
			Folders Settings Reports Logout					
			Failed Faxes Resend Selected Export Failures for Month					
My Settings			did, name, or fax numb Search Clear					
Change Password			DID	Recipient	Number	Status	Details	Patient
Fax Log								Dictated Date
			33533575	James Smith	(555) 555-5555	failure	Calls to 555 n...	Smith Anders...
								Queue Date
								07/19/18 10:27
								03/19/19 13:50

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

Reports

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

Lines Per Day – 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

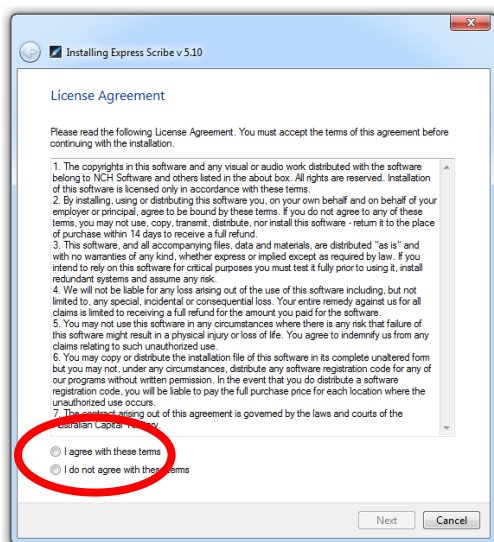
The Express Scribe version 5.10 can be downloaded from our Downloads page at www.webchartmd.com/downloads. It is listed as 'Express Scribe Setup'.



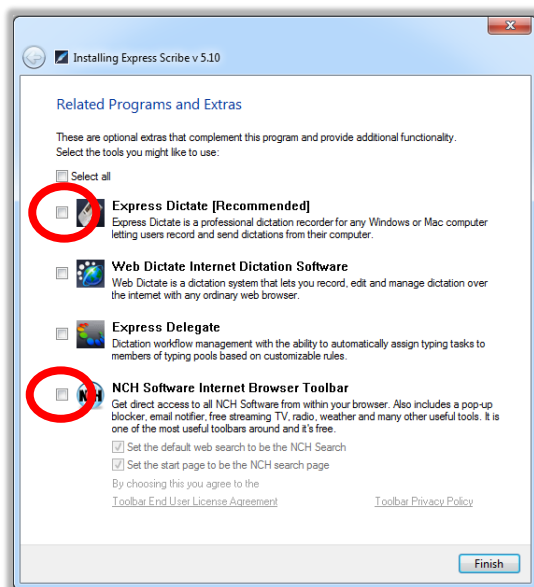
This version of Express Scribe can play the dss, mp3, wma and wav formats but is incompatible with .ds2 format. It can be installed on Windows 7, Windows 8 and Windows 10 machines.

For Windows 7 users:

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



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

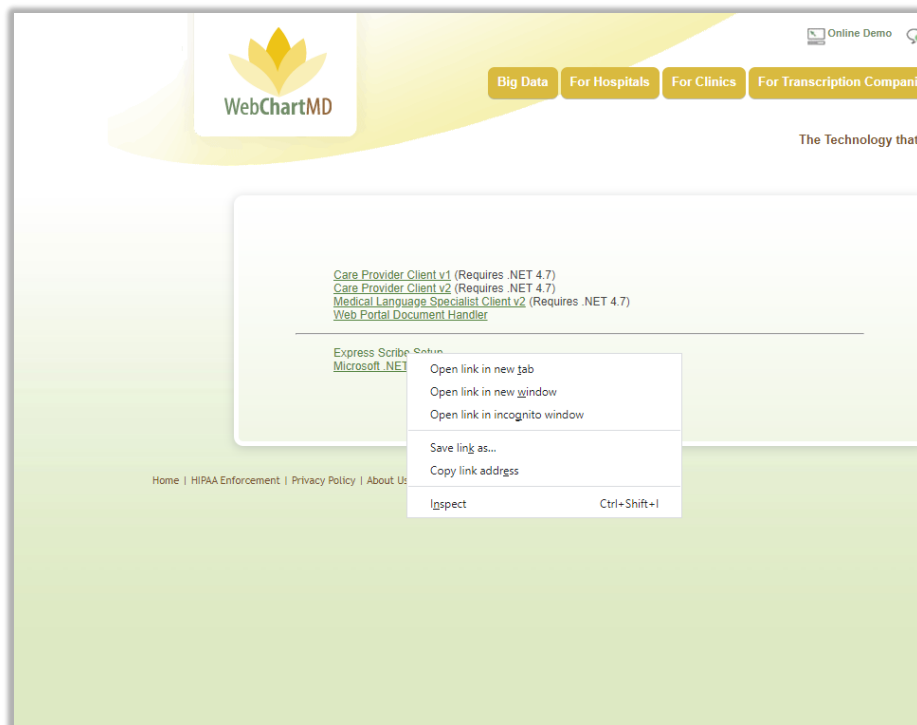


None of these options are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

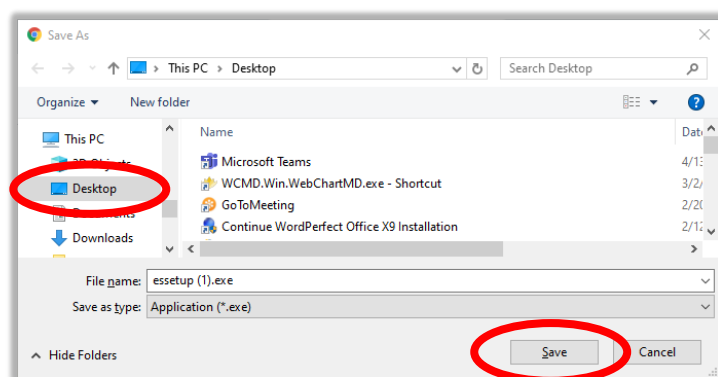
For Windows 8/10 only:

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.**

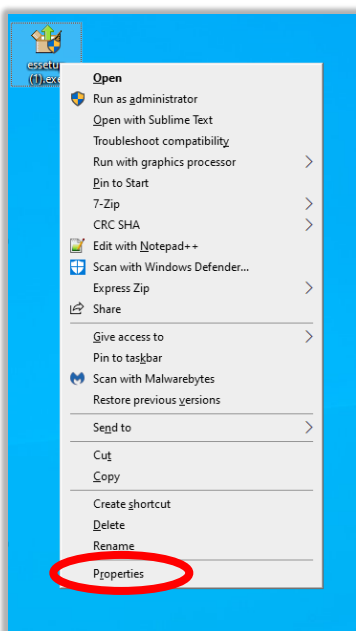
First the user needs to save the download to their desktop. To save the installer on the desktop, the user can right-click the 'Express Scribe Setup' link on the downloads page. Then click 'Save link as'.



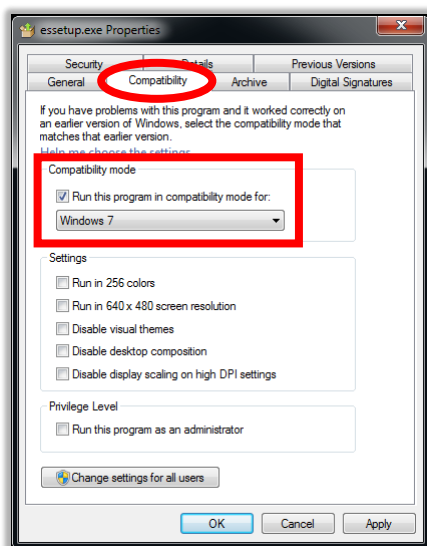
When the user clicks 'Save link as' they will be presented with a 'Save As' window. From here the user will need to save the download to their desktop.



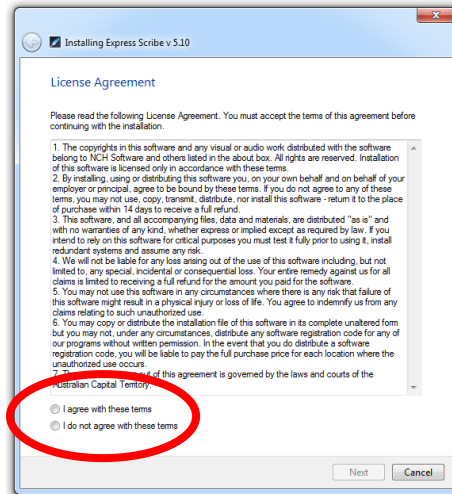
To set the Installation in Compatibility Mode on Windows 8 and 10, user needs to go to the Properties of the downloaded esetup.exe. To do so, right-click the installer and go to 'Properties' at the bottom of the window presented



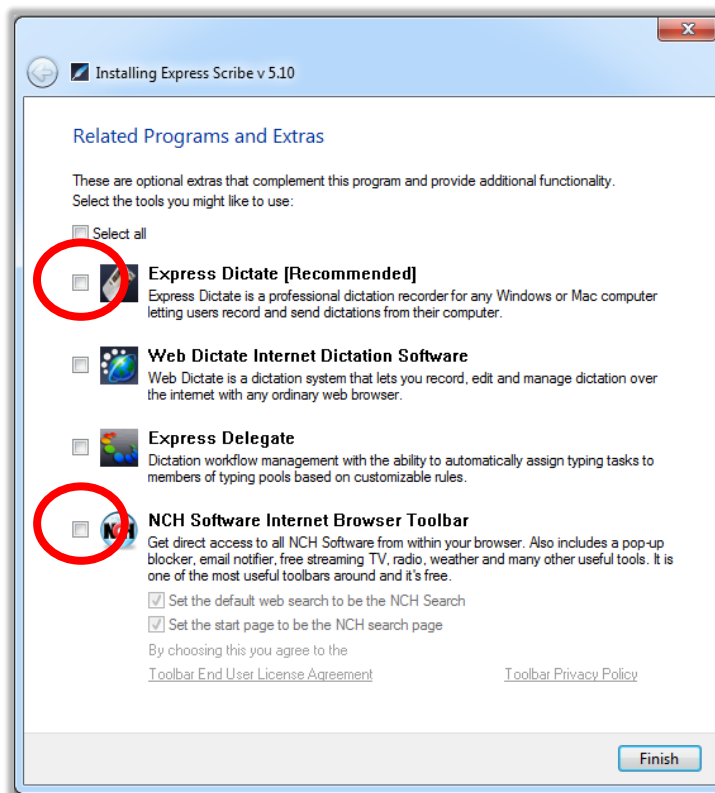
Once the Properties window opens, navigate to the Compatibility tab at the top, then look for the Compatibility Mode section. Check the checkbox that says, "Run the program in compatibility mode for" and then select 'Windows 7' and then click OK.



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

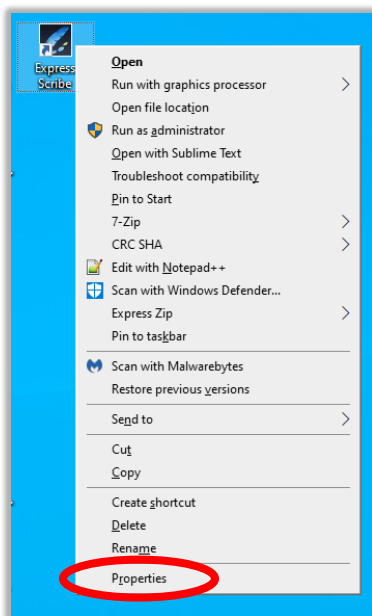


The next page has several extra options that NCH would like the user to try out and bundles them along with Express Scribe. However, none of these are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

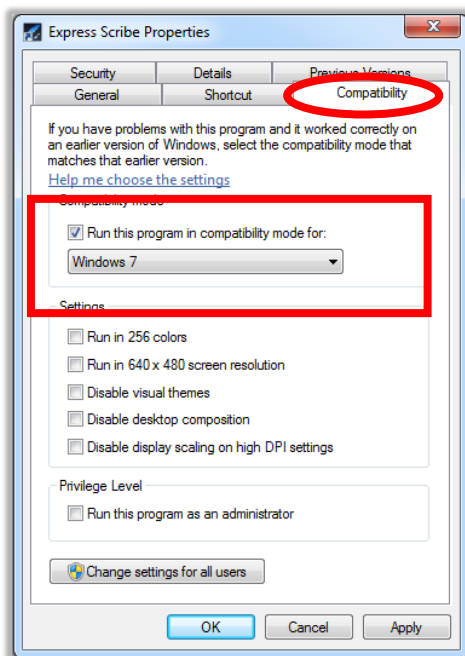


Once 'Finish' has been selected the shortcut for Express Scribe will be on the desktop. On Windows 7 the user can proceed to the next steps and setup their foot pedal (see below). However, on Windows 8 and 10, this may create two NCH Software windows to be presented automatically. Those two windows and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

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



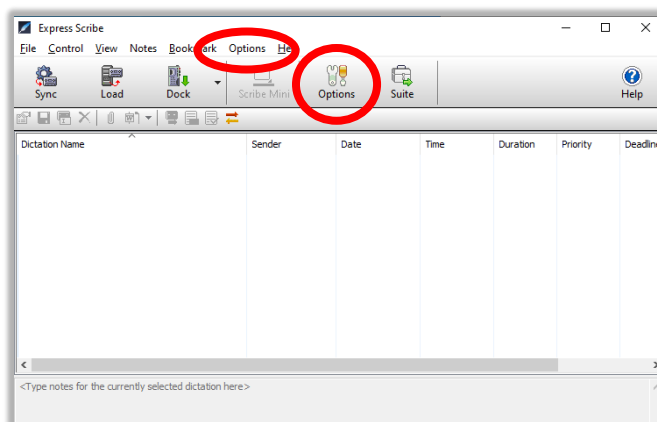
Again, just like before, the user sets the compatibility mode to Windows 7 under the Compatibility tab and clicks OK



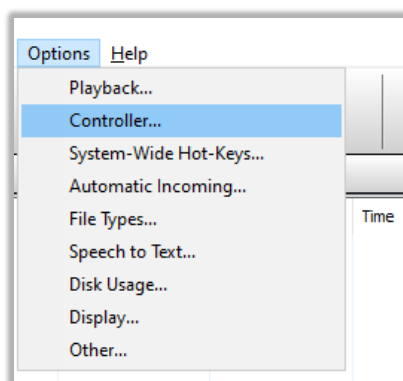
Once compatibility has been set, Express Scribe is installed and ready to be used.

Setting Up Food Pedal:

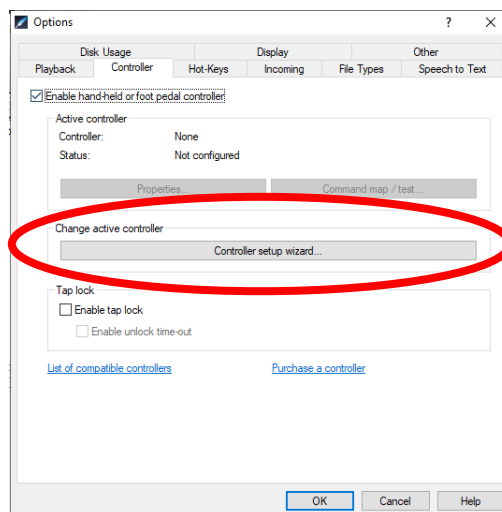
To set up the foot pedal, the user will go into the 'Options' tab in express scribe



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



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



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