

# **User Manual**

# **Facility Staff 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 <a href="mailto:support@webchartmd.com">support@webchartmd.com</a>.

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

Sincerely,

The team at WebChartMD



# **Glossary of Terms**

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

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

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

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

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

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

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

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

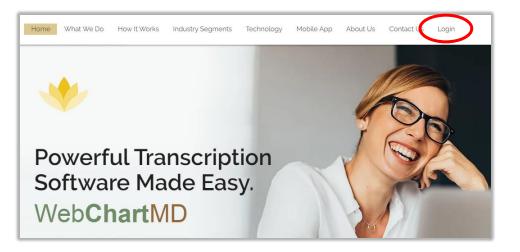
Transcriber: A user that listens to the audio dictations and types it into Word as text.

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



# Logging into the Portal

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



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

WebChartMD	For Hospitals For Clinics For Trans	Contact Us Contact Us Cogin
	Lername   Desword	Over 5,000 healthcare professionals nationwide rely on WebChartMD for patient encounter documentation management needs.



# **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.



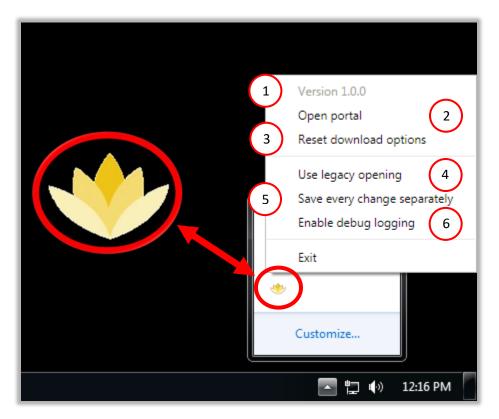
Once the download is complete, click the downloaded file to install it.

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 48) resetting both the file naming convention and preferred download location as set by the user.
  - Use legacy opening: This option is used by WebChartMD support staff to troubleshoot the DocHandler.
- 5 Save every change separately: Checking this option enables the user to manually save edits to a document on demand by using the control+S shortcut or pressing the "save" icon along the top edge of Microsoft Word.



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

# Initial View When Logging In

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Inbox Folder	Search	P Open	🖳 Pr	int 📜	Finali	ize 🄇	🛇 Reject 🙈 Cl	nange Dictator		olders Settin			qou
My Documents	=	DID			2 D		Dictator	Dictated	Uploaded	Finished <b>V</b>	First	Last	6
Draft	=	35409549	•				Taylor, Janice	03/18/20 14:04	03/18/20 14:04	03/18/20 14:04	Jessica	Smith	LA-
Pending	≡	34489188					Taylor, Janice	04/15/19 15:14	04/15/19 15:18	06/05/19 12:12	Janice	Anderson	LA-
Inbox	Ξ.	32433425			_		Taylor, Janice	09/22/14 11:00	04/11/17 17:35	09/26/17 17:31	Jessica	Smith	MO
INDOX	=	32433402					Taylor, Janice	09/22/14 11:00	04/11/17 17:35	08/15/17 16:02	Min	Chan	112
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Report Bug													
The <b>Repor</b> encounter		-						l notes ba	ck to the c	leveloper	on ar	iy bugs	
Log out Button													
The Logou	t bu	<b>tton</b> lo	gs 1	the	use	r o	ut of the	Portal, en	ding the c	urrent ses	sion		



7 System Functional Areas (Views)

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

Paul Simpson Inbox Folder										Folders	Settings	La.a.346 ( Reports	
🚄 🔁 📓 🚔 🍸 🔍 Searci	י 📑	Open 昌 Pr	int	🜄 Fi	inaliz	e 🔇	Re	ject 용 Change	Dictator 🚞 Fax	🐻 Case Info 🕤 D	elete 🕜 🗇	lyr	2yr A
filter	≡	DID	6	-	2	٦	7	Dictator	Dictated	Uploaded	V	First	L
Inter	≡	34877483						Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	1157	Dennis	Aram
	-	34588085						Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	20 11:57	Simi	Abrah
Hampton Radiology	=	54500005											

- **The Folders view** displays the folders in which the dictation and transcriptions are accessed. transcriptions. More details can be found on page 13.
- **The Settings view** accesses the various workflow settings used by the Transcription Team and healthcare Facilities. More details can be found on page 59.
- The Reports view displays the Reporting suite. More details can be found on page 65.



# **Folders View**

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# **Folder View Overview**

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

🔋 🔁 📓 音 🌹 🔍 Sear	ch 📑	Open 昌 Pi	rint 🕯	🚽 Fin	alize	🚫 Re	eject 🙈 Change	Dictator 濡 Fax	🐻 Case Info	Delete 👩 🗇		1yr 2yr
filter	≡	DID	G	≞ ;	s (		Dictator	Dictated	Uploaded	Finished <b>V</b>	First	Last
inter	=	34588244					Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	06/03/20 10:56	smith	lowen
Hampton Radiology	=	34588085	۰				Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:57	Simi	Abraham
Pendi	=	34877479	۰				Arnold, Jimmy	06/21/19 13-52	06/21/19 13:56	04/28/20 11:56	Betty	Smith
Inl 2	Ξ.	34588116	۰				Arnold, Jimmy	06/21/ 3	06/21/19 13:59	04/06/20 10:53	Zebe	Apollos
Reje	=	34588179					Bales, Traci	06/21/19	06/21/19 14:09	12/06/19 10:36	Alice	Smith
Final	=	34504483					Fairchild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:10	Jason	Bell
J. Arnold T. Bales	=	34215312	•				Fairchild, April	02/25/19 10:11	02/25/19 10:15	03/13/19 14:44	Marcia	Johnson
J. Blackwell	≡	32205993	٠				Sanders, Mar	06/13/17 16:45	06/13/17 16:48	06/26/17 17:13	Greg	Halvorson
A. Fairchild J. Johnson	=	32205830	۰				Sanders, Mar	06/13/17 16:45	06/13/17 16:48	06/26/17 17:02	Dennis	Banks
J. Jonnson J. Malk	≡	32205829	•				Sanders, Mar	06/13/17 16:45	06/13/17 16:48	06/26/17 17:01	Mahesh	Babu
D. McLaughlin	=	32205828	•				Sanders, Mar	06/13/17 16:45	06/13/17 16:48	06/26/17 17:00	James	Haverty

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

Folder Pane: Displays all folders used in the workflow.

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



## **Folder Management Functions**

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

Inbox Folder	arch	Open 🖵 P	rint 🔂 Finalize 🚫 F	Reject 🔗 Change	Dictator 🕿 Fax	Case Info		ettings F	Reports Log 1yr 2yr	
		DID	6 8 8 C 6		Dictated	Uploaded	Finished V	rirst	Last	í
filter	=	34.		Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	06/03/20 10:56	smith	lowen	
Hampton Radiology	=	34588085	0	Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:57	Simi	Abraham	1
Notes Pending	=	348774							Smith	
Inbox	=	345881				$\nabla C$	🛛 Sea	rch	Apollos	
Rejected	=	345881		655L)			0		Smith	
Final	=	34504483	$\sim$	Fairch il	05 9 15:30	2/19 15:35	05/23/19	Jason	Bell	
J. Arnold T. Bales	=	34215312	(1)(2	ai 3	4 0:11	5 9 10:15	03/13/1 6	Marcia	Johnson	
J. Blackwell	=	32205993	$\sim$ $\sim$	Sanders, Mar	06/13/17 16:45	06/13/17 16:48	06/26/17 1/:13	Greg	Halvorson	
🐻 A. Fairchild	=	32205830	•	Sanders Mar	06/13/17 16:45	06/13/17 16:48	06/26/17 17:02	Dennis	Banks	

- 1 **Pin Sidebar** This toggle button shows or hides the folder pane containing folders below the All Facilities column.
  - **Refresh** Refreshes the data on the page. This can be used to refresh the view after moving columns, changing flags or after closing a document to update the data displayed.
- 3 **Show Totals** Shows total across the top of dictations in a grey row. This helps the user see the number of dictations and other information at a quick glance without having to calculate. Number of dictations and total length of all audio files are two common uses.
  - **Sort By** Groups the dictations based on selected criteria such as a specific date or a Healthcare Provider.
    - **Filter** Adds filter boxes underneath column headers, allowing user to filter the data. The user hides dictations based on excluded data and only views the filtered results.
      - 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.

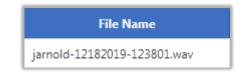
Fields requiring explanation:

5

6



- 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: 18<sup>th</sup> 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.

7

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

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

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



Special notes on the use of this feature:

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

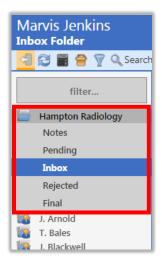
Several other folder management functions appear on the Workflow Management Toolbar, depending on which folder the user is in. Details of these functions are provided in the individual folder.

## Folders

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

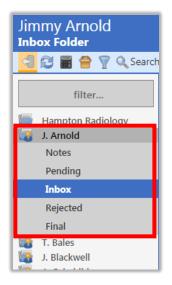
**Facility Name**: The folder containing the user folders is named with the Facility name. It shows the dictations and transcriptions to the Facility admin. More information on Facility documents can be found on page 19.

**Healthcare Provider Folders**: Below the "All Documents" and its folders are the Folders for Healthcare Providers. These are laid out alphabetically by the last name of the provider. More information on these Folders can be found on page 54.



The Inbox folder within the Facility name "Hampton Radiology" is selected.





The Inbox folder within the "Healthcare Provider Folders" for Healthcare Provider J. Arnold 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 folders visible and their content depend on the User role and their permissions.

#### Row and Page Setting

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

Pool	jarnold-11262	LIIIII.	100	
	-	Limit:	100	▶ next 1
Pool	jarnold-11262			
Pool	jarnold-11262			
Pool	jarnold-11262			
2001	Jamoid-11202			



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

Wallace, Con	moniqueharri	
Wallace, Con	moniqueharri	
Wallace, Con	gevaldmimit: F 30	Jprev door next278252

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.

prev ◀ ▶ next 2					
	-	prev ┥	▶ next	2	

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:

nbox Folder		0		-	12	0.0	· · · •		<b>- - - - - - - - - -</b>		Folders		Reports Logo
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filter		DID	o	-	2	📮 🖪	Dictator	Dictated	Uploaded	Finished <b>V</b>	First	Last	ID #
Inter	≡	35300670					Arnold, Jimmy	02/12/20 16:07	02/12/20 16:07	06/25/20 12:14	Alice	Smith	1002345
Hampton Radiology	=	34985120					Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	06/11/20 13:18	John	Smith	0052
Notes Pending	=	34588244			8		Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	06/03/20 10:56	smith	lowen	^IWAVGNAK^
Inbox	=	34588085	۰				Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:57	Simi	Abraham	BBA-145
Rejected	=	34877479	•				Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:56	Betty	Smith	01028876
Final	=	34588116	•				Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	04/06/20 10:53	Zebe	Apollos	1192285322
<ul> <li>J. Arnold</li> <li>T. Bales</li> </ul>	=	34588179					Bales, Traci	06/21/19 14:05	06/21/19 14:09	12/06/19 10:36	Alice	Smith	100234
J. Blackwell	≡	34504483	•				Fairchild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:10	Jason	Bell	36985
A. Fairchild	=	34215312	•				Fairchild, April	02/25/19 10:11	02/25/19 10:15	03/13/19 14:44	Marcia	Johnson	1029288

<u>Draft</u>: This displays the Draft folder created by the Healthcare Providers.

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

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

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

<u>Final</u>: This displays the dictations that have been finalized.



### Notes

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

# Adding Documents to Notes Folder

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

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音 🍸 🔍 Se	arch 🐻 Case Info 📑 Op	en 🍟 Delete 👔 🗇			1yr 2yr
filter	Dictator	Note Type	Effective Date	Comments	Uploaded
	Arnold, Jimmy	Hand-written Notes	02/03/20	pls add these comments	02/03/20 12:11
Hampton Rediology	Arnold, Jimmy	Patient List	01/22/20	AM patients Dr. Smith	01/22/20 14:46
Notes Pending	Arnold, Jimmy	Info Document	12/30/19	Uploaded Note 12/30/2	12/30/19 13:15
Inbox	Bales, Traci	Info Document	12/13/19	Test Document	12/13/19 15:06
Rejected	Arnold, Jimmy	Patient List	10/24/19	AM patients	10/24/19 14:31
Final	Arnold, Jimmy	draft	09/05/19	See notes on draft	09/05/19 15:38
J. Arnold	Arnold, Jimmy	Patient List	09/03		09/05/19 15:37
T. Bales J. Blackwell	Arnold, Jimmy	am patients	07/10		07/10/19 15:36
A. Fairchild	Arnold, Jimmy	Patient List	05/28/19	Patients	05/28/19 19:04
J. Johnson J. Malk			05/28/19		05/28/19 19:04
D. McLaughlin	Arnold, Jimmy	Pat			
I. Mehta	Fairchild, April	Nev			
D. Mizell	Bales, Traci	Pati 🎧 💬 🛡 🌽	<ul> <li>New folder</li> </ul>		
J. Renault M. Sanders	Arnold, Jimmy	Pati Organize 🔻	Include in library 🔻	Share with 🔻 🛛 P	Play all New fold
с ти.			,	_	
		🔶 🙀 Favorites	Name	#	Title
		📃 Deskto	p 🖬 N	ew Doc.doc	
		Deskto		ew Doc.doc	
		Secent			

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

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

<u>Dictator</u>: Once the Facility name has been selected in the above dropdown, this dropdown displays a list of Healthcare Providers at the Facility, allowing the user to select a name.

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



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

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

Case Info	for New Doc.doc		
Dictator *	Woodard, James	<ul> <li>Note Type</li> </ul>	Patient List
Effective D	05/01/2020	Comments	Patient List
Upload	Cancel	_	

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

ion					Folders	psimpsor Settings	5.8.326   <u>report bug</u> Reports Logout
🗑 🔍 Sea	arch 🐻 Case Info 📑 🤇	Open 闠 Delete 🌘	0 🗇				1yr 2yr Al
lities	Facility	Distant	Hote Type	Effective Da		•tr	Uploaded Date
	Hampton Radiol	Arnold, Jimmy	Info Document	12/30/19	Uplo	aded Note	12/30/19 13:15
	Fidelity Insurance	Bales, Lowen	Into Document	12/27/19	upa	ated Note 1	12/27/19 13:43
anager	Hampton Radiol	Bales, Traci	Info Document	12/13/19	Test	Document	12/13/19 15:06
nts ts	Fidelity Insurance	Bales, Lowen	Patient List	03/26/19			10/31/19 08:30
6	Hampton Radiol	Arnold, Jimmy	Patient List	10/24/19	AM	patients	10/24/19 14:31
	Hampton Radiol	Arnold, Jimmy	Patient List	09/05/19			09/05/19 15:38
	Hampton Radiol	Arnold, Jimmy	Patient List	09/05/19			09/05/19 15:37
	Hampton Radiol	Arnold limmy	am natients	07/10/19			07/10/19 15:36



## 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 three functions are explained in detail on page 30.

Notes Folder 🗐 😂 🗃 🚔 🍸 🔍 Sea	rch 🕞 Case Info 📑 Open	Balata		Folders S	Settings Reports Logou 1yr 2yr A
	Case Into Copen	Note Type	Effective Date	Comments	Uploaded
filter	_ <u>∧(</u> 1 )	3 instructions	05/27/20		05/27/20 16:01
Hampton Radiology	Arnola, Jimmy	Hand-written Notes	02/03/20	pls add these comments	02/03/20 12:11
Notes	Arnold, Jimmy	Patient List	01/22/20	AM patients Dr. Smith	01/22/20 14:46
Pending Inbox	Arnold, Jimmy	Info Document	12/30/19	Uploaded Note 12/30/2019	12/30/19 13:15
Rejected	Bales, Traci	Info Document	12/13/19	Test Document	12/13/19 15:06
Final	Arnold, Jimmy	Patient List	10/24/19	AM patients	10/24/19 14:31
J. Arnold T. Bales	Arnold, Jimmy	draft	09/05/19	See notes on draft	09/05/19 15:38

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.



Marvis Jenkins Notes Folder				Folders S	marvis10   5.8.340   <u>report bug</u> Settings Reports Logout
⊴ 😰 📰 🚔 🍸 🔍 Sear	Case Info			ctator [Hampton Radiolo	1yr 2yr All
Hampton Radiology Notes Pending Inbox Rejected		lampton Radiology nobile instructions	Effective		
Final	Dictator	Note Type	Effective Date	Comments	Uploaded
J. Arnold	Arnold, Jimmy	mobile instructions	05/27/20		05/27/20 16:01
J. Blackwell	Arnold, Jimmy	Hand-written Notes	02/03/20	pls add these comments	02/03/20 12:11
A. Fairchild	Arnold, Jimmy	Patient List	01/22/20	AM patients Dr. Smith	01/22/20 14:46
J. Malk	Arnold, Jimmy	Info Document	12/30/19	Uploaded Note 12/30/2019	12/30/19 13:15

Open: This function opens the transcription document into Word. More information about the editing a transcription can be found on page 56.

3 Delete: This allows the user to delete dictations and transcriptions from the workflow. For more information about deleting, please see page 34.

#### Columns

2

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

#### Column Management

Unlike other Folders, column management features are limited to column arranging, and column ascending/descending capabilities. See page 38 for a full description of column management features.

#### File Display

The files displayed in this section are not dictation files. All visible files in this folder are note documents. For a detailed description of available file statuses and their meaning, see page 55.



### File Action Menu

All available "File Action Menu" options viewable in the All Documents Inbox and their descriptions can be found starting on page 42.



## 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.

Pendir older	-					_		Fold	lers Settings	Reports	Logo
🧧 🙃 🧧 🖗 🔍 Sea	rct 🕑	Change TAT	í 🍓 Change Dic	tator 🐻 Case Inf	fo 闠 Delete 👔					1y	r 2yr /
ter		DID	Dictator	Uploaded V	Dictated	File Name	TAT	Report Type	1D #	First	Last
	=	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarnold-0:	STAT				
Han ton Radiology	=	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032.	2hr STAT		01099	Bryce	Polanski
Pending	=	35362130	Arnold, Jimmy	03/03/20 14:29	03 2 9	jarnold-03032	2hr STAT				
Inhox	=	35344679	Renault, James	02/26/20 17:29	01/ 38	jrenault-0115	Standard				
Rejected	=	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jrenault-1008	Standard				
Final	=	35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarnold-02262	2hr STAT	LETTER			

The Pending folder consists of three important areas:

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



3

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

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



## **Folder Management Functions**

1

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:

Marvis Jenkins Pending Folder		1		3				Fold	marvis lers Setting	10   5.8.340 s Report	
🚄 🔁 📓 🚔 🍸 🔍 Sea	rch 🕙	Change TAT	용 Change Dict	ator 🐻 Case Inf	fo 簤 Delete 🔞	0				1	yr 2yr 🥖
(llhar)		DID	Dir	Uploaded 🔻	$\frown$	File Name	TAT	Report Type	ID #	First	Last
filter	=	35362356	Arno 2	03/03/20 15:07	os 4	jarnold-03032	2hr STAT				
Hampton Radiology	=	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032	2hr STAT		01099	Bryce	Polanski
Notes Pending	=	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29	jarnold-03032	2hr STAT				
Inbox	=	35344679	Renault, James	02/26/20 17:29	01/15/18 19:38	jrenault-0115	Standard				
Rejected	=	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jrenault-1008	Standard				
Final	=	35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarnold-02262	2hr STAT	LETTER			
J. Arnold	≡	35343500	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:00	jarnold-02262	2hr STAT				

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

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

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

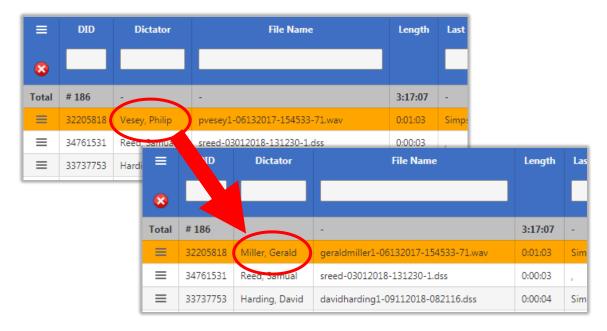
To change the TAT, select a dictation and click on the "Change TAT" button. Select the desired TAT change and click "Change".

nding Folder						F	olders	Settings	Reports I	ogo
🔴 🔁 🔚 音 🤋 🔍	Search 🔇	Change	TAT 🔬 hange Dictator	Case Info 📑 N	lew Docu	iment 簤 Del	ete 👩 ¢	5	1yr 2	yr
My Documents	Chan	ge File 1								
Draft		TAT		~						
Pending	Ch	ange	Standard							
Inbox			1hr STAT							
		DID	2hr STAT	Dictate	d	File Name	Length	TAT	Report Type	ID
Rejected	Total	#1	4hr STAT 8hr STAT		-		0:01:07	-	-	-
Final	=	3557475	12hr STAT	<mark>/03/20</mark> 1	12:45 D	JTaylor-060	0:01:07	Standard		



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

Using the "Change Dictator" feature changes the Healthcare Provider identification attached to a dictation or transcription. When the Healthcare Provider is changed, the filename is updated to reflect the new Healthcare Provider. The "Dictator" column (and "Facility" column if applicable) is/are also updated. The "Change Dictator" feature allows Transcription Team staff to change Healthcare Providers within the same Facility and from one Facility to another.



Case Info: More information on Case Info can be found on page 33.

3





## Columns

All available columns viewable in the Pending and their descriptions can be found starting on page 34.

#### Column Management

See page 38 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 55.

## File Action Menu

All available "File Action Menu" options viewable in the Pending and their descriptions can be found starting on page 42.



#### Inbox

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

Marvis Jenkins Inbox Folder										Folders	marvis10 Setting	<mark>5.8.340   <u>report b</u> ports Logo</mark>
🗐 🔁 📓 音 🍸 🔍 Sean	1	Open 昌 P	rint [	🎝 Finalize 🄇	Re	ject ୡ Change	Dictator 🚞 Fax	🐻 Case Info	) Delete 🕜 🎵			2 1yr 2yr 1
filter		DID	ō	820	A	Dictator	Dictated	Uploaded	Finished <b>V</b>	First	Last	ID #
miter		34985120				Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	06/11/20 13:18	John	Smith	0052
Hampton Radiology	=	34588244		8		Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	06/03/20 10:56	smith	lowen	^IWAVGNAK^
Notes Pending	=	34588085	۰			Arnold, Jimmy	06/21/19 13:50	06/2 2:54	04/28/20 11:57	Simi	Abraham	BBA-145
Inbox	=	34877479	۰			Arnold, Jimmy	06/21/19 13:52	0 3 6	04/28/20 11:56	Betty	Smith	01028876
Rejected	=	34588116	۰			Arnold, Jimmy	06/21/19 13:55	06/21/10 13:59	04/06/20 10:53	Zebe	Apollos	1192285322
Final	=	34588179				Bales, Traci	06/21/19 14:05	06/21/19 14:09	12/06/19 10:36	Alice	Smith	100234
J. Arnold	=	34504483	•			Fairchild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:10	Jason	Bell	36985

The Inbox folder consists of three important areas:

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

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

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



## **Folder Management Functions**

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	arvis Jenkins ox Folder				3	5		7		Folders		5.8.340   <u>report b</u> Reports Logo
4	🔁 📓 曾 🦞 Q. Sea	irch [	Open 📇 Pi	rint 📘	Finalize	🚫 Reject 🍇 Change	Dictator 📇 Fax	Case Info 🎁	Delete 🕜 🗇			1yr 2yr /
-	filter	=	DIT	1	121	Dictator	Dict	Uploaded	ved 🔻	First	Last	ID #
	niter	=	3493	2 5		4 old, Jimmy	06/21 6	06/21/19 13:56	8 13:18	John	Smith	0052
-	Hampton Radiology	=	34588244		8	Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	06/03/20 10:56	smith	lowen	^IWAVGNAK^
	Notes Pending	=	34588085	•		Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:57	Simi	Abraham	BBA-145
	Inbox	=	34877479	•		Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:56	Betty	Smith	01028876
	Rejected	=	34588116	•		Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	04/06/20 10:53	Zebe	Apollos	1192285322
	Final	=	34588179			Bales, Traci	06/21/19 14:05	06/21/19 14:09	12/06/19 10:36	Alice	Smith	100234
	J. Arnold	=	34504483	•		Fairchild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:10	Jason	Bell	36985

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

Open: This function opens the transcription document into Word. More information about the editing a transcription can be found on page 55.

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

Finalize: This function finalizes the transcription and moves it to the Final folder. More information about the finalized status can be found on page 55.

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 55.

Change Dictator: More information on Change Dictator can be found on page 27.

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

To manually fax transcription(s) from the portal:

```
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```



Click the "Fax" icon in the toolbar to open the "Send Fax" application.

This window is divided into two sections:

- Search for Fax Recipient
- Add New Fax Recipient

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



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				Send Fax			
Search to locate fax recip	pient(s)			Search to locate fax rec	pient(s)		
Smith	Search			201	Search		
Select fax recipient(s)				Select fax recipient(s)			
Office Name	Contact Name	Location	Fax	Office Name	Contact Name	Location	Fax
Freeman Internal Medicine	Gerald Smith, MD		(757) 551-2122	Freeman Internal Medicine			(201) 555-12
Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1212	Freeman Internal Medicine	Manfred E. Smith, MD		(201) 555-1
Smithers Associates			(888) 555-1212	Dr. Albert Jones			(201) 555-1
Smithers Associates	Frank Smithers, MD		1-423-432-9221	Dr. Albert Jones	Dr. Albert Johnson		(201) 555-12



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

Search to locate fax reci	pient(s) 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			

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

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

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

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

Notes on adding fax recipients:

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



Send Fax				
Search to loc	ate fax recipier	nt(s)		
name or fax	number	Search		
Select fax rec	ipient(s)			
Office Name	Contact Name	Location	Fax	
John Kramer			(124) 509-9227	
include co	ver sheet			
Add new fax	recipient(s)			
John Krame	r 1	24-509-9	227	Add
🔲 save to add	dress book			
Close	Send Fax			

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

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

- 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.

Case Info: This allows the user to edit the demographics of a transcription. For more information about Case Info, please see page 22.



Delete: This allows the user to delete dictations and transcriptions from the workflow. For more information about deleting, please see page 34.

#### Columns

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All available columns their descriptions:

Actions: This column contains three icons:

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

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

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).

Marvis Jenkins Inbox Folder						p <mark>son   5.8.326   <u>report bu</u> Igs Reports Logou</mark>
🚄 🔁 🗑 骨 🍸 🔍 Seard	:h 📑 (	Open 昌 Prin	it 词 F	inalize 🚫 Reject 🍓 Change Dictator	🖀 Fax 🚡 Case Info 🥤	Delete 👔 🗇 1yr2y
filter	≡	DID	6	Dict: 1 2	3 ort Type	Job #
	≡	34588166		Miller, Gera	ATIVE REP	
Hampton Radiology	=	34504489		Arnold		
Pending	=	34393968		Shah, A		Ø 🗊 😥
Inbox	Ξ.	34290097		Arnold		Ø) 🗐 関
Rejected	=	34215312	•	Fairchild, April	MRI	Ø 🗊 🖻
Final	≡	33282796		Arnold, Jimmy	ULTRASOUND	Ø E 5

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



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 and a previous version of the document needs to be referred for rectifications.

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

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

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

<u>Dictator</u>: The Healthcare Provider or owner of the transcription.

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

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

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

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

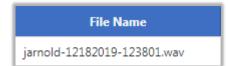
<u>eSigned</u>: This column displays if the transcription has been electronically signed by the Healthcare Provider.

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

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



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



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

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

<u>First</u>: This column displays the patient's first name.

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

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

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

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

Location: For facilities using multiple locations.

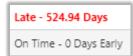
<u>Locked</u>: This column displays a small lock icon if the document is already opened by another user. See more information on the Lock feature in the Document Management section.

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

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

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





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

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

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

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

<u>Status</u>: This column displays the status of the file. See page 55 in the Document Management section for a full description of all Statuses.

<u>TAT</u>: this column displays the turn-around time assigned to a dictation. See page 26 for a full description of dictation Priority & TAT setup.

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



# Column Management

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

#### Rearranging

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

~		DID		-			Dictator	Dictated		Case Info aded	Finishe		First			
					-											
ogy	1	35300670	•		_		rnold, Jimmy	02/12/20 16		0 10:07	06/25/20		Alice	3		
	=	34985120					rnold, Jimmy	06/21/19 13		19 13:56	06/11/20		John	3		
	=	34588244				_	rnold, Jimmy	06/21/19 13		9 13:59	06/03/20		smith			
	=	34588085	•				rnold, Jimmy	06/21/19 13		19 13:54	04/28/20		Simi	4		
	=	34877479	•		_	_	rnold, Jimmy	06/21/19 13		9 13:56	04/28/20	) 11:56	Retty	g		
	=	34588116	•			A	rnold, Jimmy	06/21/19 13	8:55 06/21/3	9 13:59						~
											nalize 🕻	Reje		nge Did ator 🚞	Fax Case Inf	o 🗑 Dele
											۵ 💭		tator	aded Dic ated	Uploaded	Finish
												Arnolo	, Jacoby	02/12/20 16:07	02/12/2/16:07	06/25/20
													l, Jimmy I, Jimmy	05/12/2016:07 06/21/1913:52	02/12/2/16:07 06/21/19 13:56	
nc.												Arnolo				06/11/20
)S												Arnolo	l, Jimmy	06/21/19 13:52	06/21/19 13:56	06/11/20
	arch [	] Open 듣	Pri	nt 🕻	Fi	nalize	🚫 Reject 🖨	Chan <u>ge I</u>	Dictator 🕿	Fax 🐻	Case Info	Arnolo Arnolo	l, Jimmy I, Jimmy	06/21/19 13:52 06/21/19 13:55 Folder	06/21/19 13:56	06/11/20
	arch		_			nalize			Dictator 🕿 Ploaded	Fax 🐻 ( Dict		Arnolo Arnolo	l, Jimmy I, Jimmy	06/21/19 13:52 06/21/19 13:55 Folder	06/21/19 13:56	06/11/20
	_	∃ DID						or U			ated	Arnolo Arnolo D 資 D Finit	l, Jimmy I, Jimmy elete 👔	06/21/19 13:52 06/21/19 13:55 Folder	06/21/19 13:56	06/11/20
∕Q <sub>e</sub> Se		■ DID ■ 353006	70	6			Dictat	or U nmy 02/1	ploaded	Dict	ated	Arnolo Arnolo D 🔐 D Finis 06/25,	I, Jimmy I, Jimmy elete 2 shed <b>v</b>	06/21/19 13:52 06/21/19 13:55 Folder 57 First	06/21/19 13:56	06/11/20
∕Q <sub>e</sub> Se		<ul> <li>DID</li> <li>353006</li> <li>349851</li> </ul>	70 20	6			Arnold, Jin	or U nmy 02/1 nmy 06/2	ploaded 2/20 16:07	Dict. 02/12/2	ated 0 16:07 9 13:52	Arnold Arnold C C D Finit 06/25, 06/11,	I, Jimmy I, Jimmy elete 2 shed /20 12:14	06/21/19 13:52 06/21/19 13:55 Folder First Alice	06/21/19 13:56	06/11/20
∕Q <sub>e</sub> Se		<ul> <li>DID</li> <li>353006</li> <li>349851</li> <li>345882</li> </ul>	70 20 44	6			Dictat Arnold, Jin Arnold, Jin	or U nmy 02/1 nmy 06/2 nmy 06/2	ploaded 2/20 16:07 21/19 13:56	Dict 02/12/2 06/21/1	ated 10 16:07 19 13:52 19 13:55	Arnold Arnold C C D C Fine 06/25, 06/11, 06/03,	I, Jimmy I, Jimmy elete shed ▼ /20 12:14 /20 13:18	06/21/19 13:52 06/21/19 13:55 Folder © First Alice John	06/21/19 13:56	06/11/20
∕Q <sub>e</sub> Se		<ul> <li>DID</li> <li>353006</li> <li>349851</li> <li>345882</li> <li>345880</li> </ul>	70 20 44 85				Dictat Arnold, Jin Arnold, Jin Arnold, Jin	or U nmy 02/1 nmy 06/2 nmy 06/2	ploaded 12/20 16:07 21/19 13:56 21/19 13:59	Dict 02/12/2 06/21/1 06/21/1	ated 0 16:07 9 13:52 9 13:55 9 13:55	Arnold Arnold C C C C C C C C C C C C C C C C C C C	I, Jimmy I, Jimmy I, Jimmy elete 2 shed ▼ /20 12:14 /20 13:18 /20 10:56	06/21/19 13:52 06/21/19 13:55 Folder First Alice John smith	06/21/19 13:56	06/25/20 06/11/20 06/03/20
S C Se		<ul> <li>DID</li> <li>353006</li> <li>349851</li> <li>345882</li> <li>345880</li> <li>348774</li> </ul>	70 20 44 85 79				Dictat Arnold, Jir Arnold, Jir Arnold, Jir Arnold, Jir	or U nmy 02/1 nmy 06/2 nmy 06/2 nmy 06/2	ploaded 2/20 16:07 21/19 13:56 21/19 13:59 21/19 13:54	Dict 02/12/2 06/21/1 06/21/1 06/21/1	ated 0 16:07 9 13:52 9 13:55 9 13:50 9 13:52	Arnold Arnold C C C C C C C C C C C C C C C C C C C	I, Jimmy I, Jimmy I, Jimmy I, Jimmy I, Jimmy Shed ▼ (20 12:14 (20 13:18 (20 10:56 (20 11:57	06/21/19 13:52 06/21/19 13:55 Folder First Alice John smith Simi	06/21/19 13:56	06/11/20

#### 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).



ler								
te 🚱 Cha	nge Dictato	r Submit 🔽 Facility	Case Info 📄 O Dictator	pen 🌒 Play	/ 🛃 Move Status			
S Total	# 194			3:15:55				
	# 194 34761531	- Maplewood S	- Reed, Samual	0:00:03	- Pending			
-	33737753	Caris, Sanders	Harding, David		-			
-	34504483	Hampton Rad	Fairchild, April	ute 🕤	nange u			
-	34504491	Advanced Ort	Harris, Monig	>	( D	ID I	Facility	Dictator
-	34504482	Hampton Rad	Johnson, Jim					
-	34504479	Hampton Rad	Malk, Jason	-				
_	34304473	Hampton Rad	Walk, Jason	Tot	al	DID		
						Facility		2
								eed Samua
						Dictator		
						Dictator Routed To	ers	Harding, Dav
							ers ad	Harding, Dav
						Routed To		Harding, Dav Fairchild, Apr
Chang	e Dictator	Submit 🖥	Case Info			Routed To Pool	ad	Harding, Dav Fairchild, Api Harris, Monio
Chang	e Dictator DID	Submit 🛛	Case Info			Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Api Harris, Monio
				Open (		Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Api Harris, Monio
×				Open (		Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Api Harris, Monio
× 8		Dictator	Length	Open ( Status		Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Api Harris, Monio
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× × rotal	DID DID Facili Dictat Routed	Dictator ty Ja tor avid	Length	Open ( Status		Routed To Pool Locked	ad Drt	Harding, Dav Fairchild, Apr Harris, Monic
× votal E	DID DID Facili Dictat	Dictator	Length 3.00:03 0:00:04 0:02:31	Copen ( Status Pending Pending	E	Routed To Pool Locked	ad Drt	eed, Samual Harding, Dav Fairchild, Apr Harris, Moniq Johnson, Jim

## Sorting

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



The unsorted TAT column header:

Paula Simpson Workflow Manager Fold	er							Folder	s S	psimpson   5.8. Settings Rep	326   <u>report bu</u> orts Logou
🗐 🔁 🗃 管 🍸 冷 Rout	e 용 Cha	nge Dictato	r 词 Submit 🐻	Case Info	📑 Open (	🌒 Play 📃	Move 🧼 🗄	xport 🗑 De	lete	0 🗇	1yr 2yr A
All Facilities	≡	DID	Dictator	Length	Status	First	Las	TAT	)	Report Type	Last Modified
filter	8										
💼 Workflow Manager	Total	# 199	-	3:18:48	-	-	-	-	-	-	-
My Documents	≡	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT			
M. Abbott	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT		OFFICE NOTE	Simpson, Paul
S. Abraham	=	34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard			Bales, Zoey
<ul> <li>S. Ackerman</li> <li>N. Adair</li> </ul>	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT		SCH TEST	Bales, Zoey
🚯 A. Ahmed	=	34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard		CT SCAN	Simpson, Paul
<ul> <li>N. Ahmedli</li> <li>C. Aiken</li> </ul>	=	34504491	Harris, Moniq	0:02:31	QA	Simson	Doug	1hr STAT		OPERATIVE R	Bales, Zoey
A. Albers	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT		XRAY	Bales, Zoey
K. Alfaro	=	34504524	Harris, Moniq	0:01:08	QA	Victor	Agheboir	12hr STAT		CONSULT	Simpson, Paul
C. Ames	=	34504604	Harris, Moniq	0:02:21	QA	Nancy	Comstock	Standard		DISCHARGE S	Bales, Zoey
W. Andersen	=	34504629	Harris, Moniq	0:00:48	QA	Greg	Jones	Standard		OPERATIVE R	Wallace, Con
<ul> <li>P. Andolina</li> <li>S. Andrew</li> </ul>	=	34512978	Bales, Lowen	00:00:00	QA	Quinn	Bales	Standard		Blank Template	Bales, Zoey

# The TAT column header in ascending sort:

Paula Simpson Workflow Manager Fold	Vorkflow Manager Folder Folder Folders Settings Reports Logout														
🗐 🔁 🔚 骨 🍸 冷 Rout	e 🍓 Cha	nge Dictato	r 词 Submit 🐻	Case Info	📑 Open (	衡 Play 📃	Move 🧼 🖡	port 🗑 De	lete	0 🖓	1yr 2yr All				
All Facilities	≡	DID	Dictator	Length	Status	First	Las	TAT 🔺		Report Type	Last Modified				
filter	8														
😫 Workflow Manager	Total	# 198	-	3:18:36	-	-	-	-	-	-	-				
My Documents	=	34504491	Harris, Moniq	0:02:31	QA	Simson	Doug	1hr STAT		OPERATIVE R	Bales, Zoey				
M. Abbott	=	35003347	Arnold, Jimmy	0:00:12	Pending	Jeremy	Hobson	1hr STAT			,				
S. Abraham	=	35022561	Bales, Lowen	0:00:02	QA	Allison	Smith	1hr STAT		A	Bales, Zoey				
S. Ackerman N. Adair	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT			1				
A. Ahmed	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT		OFFICE NOTE	Simpson, Paula				
N. Ahmedli C. Aiken	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT		SCH TEST	Bales, Zoey				
A. Albers	=	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT							
K. Alfaro	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT		XRAY	Bales, Zoey				
C. Alley	=	34504524	Harris, Monig	0:01:08	QA	Victor	Agheboir	12hr STAT		CONSULT	Simpson, Paula				
W. Andersen	-	34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard			Bales, Zoev				
P. Andolina S. Andrew	-	34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard		CT SCAN	Simpson, Paula				
N. Angell	=	34504604	Harris, Moniq	0:02:51	QA QA	Nancy	Comstock	Standard		DISCHARGE S	Bales, Zoey				

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The TAT column header in descending sort:

Paula Simpson Workflow Manager Fold	∍r							Folders	psimpson   5.8.32 Settings Repor	6   <u>report bug</u> ts Logout
🗐 🔁 🗃 管 🍸 🛷 Route	🚑 Cha	nge Dictato	r 词 Submit 🐻	Case Info	📑 Open (	🎒 Play 📃	Move 🧼 Exp	n 🗑 Delet	0 🗗 1	yr 2yr <mark>All</mark>
All Facilities	≡	DID	Dictator	Length	Status	First	Last	TAT 🔻	Report Type	Last Modif
filter	8									
💼 Workflow Manager	Total	# 92	-	1:36:35	-	-	-	-		
My Documents	≡	35081472	Bales, Lowen	0:00:08	Pending			Standard		1
M. Abbott	=	35072519	Bales, Lowen	0:00:36	QA	Ralph	Smith	Standard	A	Bales, Zoey
S. Abraham	≡	34504524	Harris, Moniq	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Pa
S. Ackerman	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
🔞 A. Ahmed	=	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT		
N. Ahmedli C. Aiken	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
A. Albers	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Pa
K. Alfaro C. Alley	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		
C. Alley C. Ames	=	35147151	Bales, Traci	00:00:00	QA	Allison	Smith	1hr STAT	Blank Template	Bales, Zoey
W. Andersen	=	35109384	Bales, Lowen	00:00:00	QA	Michael	Salyers	1hr STAT	A	Bales, Traci
<ul><li>P. Andolina</li><li>S. Andrew</li></ul>	≡	35081496	Bales, Lowen	0:00:05	Pending			1hr STAT		1

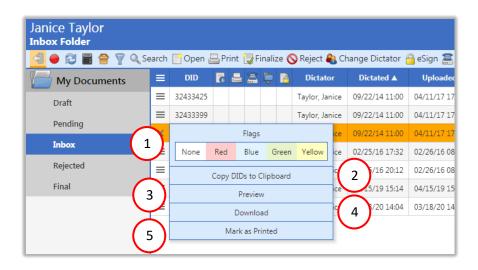


# **File Display**

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 55.

#### File Action Menu

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



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

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

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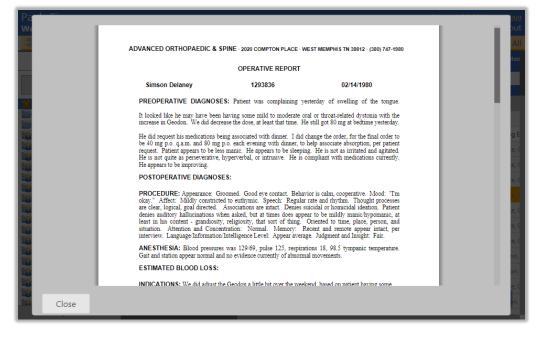


2) Copy DIDs to Clipboard: This feature allows the user to quickly copy the DID numbers of the selected dictations into the clipboard for copy-paste to another application, such as Notepad. To use the feature, select a single or multiple rows and click "Copy DIDs to Clipboard". Transfer copied DID numbers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

≡	DID	Dictator	Le	ength	Status		First	Last
8			Í	Un	titled - N	otepa	d	
<u> </u>				File	Edit Fo	ormat	View	Help
Total	# 198	-	3:	3476 3450	4482			
≡	34761531	Reed, Samual	0:	3450				
≡	33737753	Harding, David	0:	34 50	4524			
=	34504483	Fairchild, April	0:					
≡	34504479	Malk, Jason	0:					
≡	34504482	Johnson, Jim	0:					
=	34504491	Harris, Moniq	0:					
=	34504524	Harris, Moniq	0:					
≡	34504604	Harris, Moniq	0:					
=	34504629	Harris, Moniq	0:					
=	34512978	Bales, Lowen	0					

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.

3



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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:

4

The downloading process can be setup with these easy steps:

## Step 1: Select files(s) to download

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

Janice Taylor Inbox Folder											
🔁 🔴 🔁 📓 音 🍸 🔍 Se			_						-	hange Dictator 🍵	
My Documents	=	DID	D	-	2	Ģ	4	Dictate	or	Dictated <b>A</b>	Uploaded
Draft	≡	32433425						Taylor, Ja	nice	09/22/14 11:00	04/11/17 17
	≡	32433399						Taylor, Ja	nice	09/22/14 11:00	04/11/17 17
Pending	×			F	Flags				ice	09/22/14 11:00	04/11/17 17
Inbox	≡	None	Red	1	Blue	G	reen	Yellow	ice	02/25/16 17:32	02/26/16 08
Rejected	≡		Сору		s to C	linh	oard		ce	02/25/16 20:12	02/26/16 08
Final	≡		copy		eviev		Juru		ice	04/15/19 15:14	04/15/19 15
	≡	- (			wnloa				ice	03/18/20 14:04	03/18/20 14
			4	/ark a	as Pri	inter					

<u>Step 2</u>: Create the desired filename format

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

🚸 Set S	eparator	×
*	What separator should the filename use?	
	→ Dash ("-")	
	$\rightarrow$ Underscore ("_")	
	→ Space (" ")	
	$\rightarrow$ Percent ("%")	



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

<u>Step 3</u>: Select the desired file name components.

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

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

Examples of typical filenames are:

DID-Practice-MRN-Provider\_Last, which would populate with data as:

32101595-Allentown Chiropractice-Johnson

or DOV (MMDDYYYY)\_Provider\_First\_Patient\_Last\_Practice, which would display as:

02-20-2020\_Jessica\_Smith\_Williams\_Dallas-Surgery-Center

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

=	DID	Dictator	Lengtl	* Select Fields X	rt Type
				🚸 Select filename components from list	
8				-11	
Total	# 5000	-	22:57:1	Filename: patient_last patient_first practitioner_last	
≡	42450	Woodard, Ja	0:00:02	dov dictationid	, in the second s
=	42448	Woodard, Ja	0:00:01		
=	42449	Woodard, Ja	0:00:02		N N
=	47908	Tille, Charles	0:00:05	patient_last patient_first practitioner_last dov dictationid	
=	113445	Woodard, Ja	0:00:01	$\rightarrow$ DID	8
=	119917	Woodard, Ja	0:00:06		1
=	122028	Woodard, Ja	0:00:06	$\rightarrow$ Practice	E
=	125138	Woodard, Ja	0:00:04	$\rightarrow$ DOV (MMDDYYYY)	
≡	126537	Renault, James	0:00:02	→ DOV (MM-DD-YYYY)	E
=	202126	Woodard, Ja	00:00:00		N
≡	146552	Woodard, Ja	0:00:04	$\rightarrow$ Provider ID	F
=	273723	Woodard, Ja	0:00:07	→ Provider First	E
≡	156525	Mizell, David	0:00:06		E
=	181740	Woodard, Ja	0:00:06	→ Provider Last	1
≡	181742	Woodard, Ja	0:00:08	$\rightarrow$ Patient First	A N
=	178565	Mizell, David	0:00:09	$\rightarrow$ Patient Last	ſ
=	241125	Woodard, Ja	0:00:09		N N
=	261850	Woodard, Ja	0:00:04	$\rightarrow$ MRN	ſ
=	280916	Woodard, Ja	0:00:02	$\rightarrow$ DOB (MMDDYYYY)	ſ
=	351492	Woodard, Ja	0:00:04		E
≡	458602	Woodard, Ja	0:00:03	$\rightarrow$ DOB (MM-DD-YYYY)	E NOTE
=	461064	Fairchild, April	0:00:04	$\rightarrow$ Done	NOTE F
=	3473029	Woodard, Ja	0:00:01		next'
=	532167	Woodard, Ja	0:00:01	In Final Kirsten Poole Standard OFFIC	CE NOTE

## 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.

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



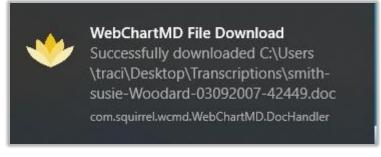
Step 5: Choose download location

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

8	Select Folde	er			_				×	
Total	$\leftarrow \   \rightarrow$	~ 🛧 🔜 > This	PC > Des	ctop		√ Ū	Search Desktop		R	-
=	Organize	<ul> <li>New folder</li> </ul>	r						0	Woodard
=	- N 1	Name			^			C	Date r ^	Arnold, J
=	<b>u</b>	<b>finished</b>						1	2/11/	Woodard
=	🐉 Dre		emails 12022						2/11/	Tille, Cha
=	<u> a</u> d	Master N	lanual Proje	ct					/10/2	Evans, Ja
=	JE E	Producti	on Audio file	es NOT TE	ST			1	/10/2	Woodard
=	🧟 F	Resource Returned	Link project	t					2/11/	Evans, Ja
=	Jan H	screensh							1/22/	Arnold, J
=	<u>a</u> n	septemb	er 2019					1	0/9/2	Evans, Ja
=	S C	Transcrip	tions					1	/10/2 🗸	Woodard
=		Folder	Transcripti	ions						Fairchild,
=						Г	Select Folder	Cance		Evans, Ja
=									.:	Evans, Ja
=	181740	Woodard, Ja	0:00:06	In Final	John	Smith	1hr STAT			Arnold, J
=	181742	Woodard, Ja	0:00:08	In Final	Louis	Freem	an Standard			Woodard

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

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



Download confirmation popup message



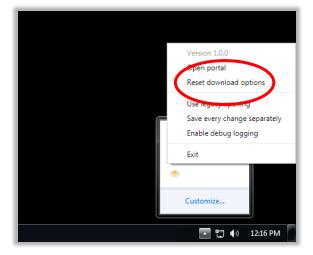
l iver in the second s	ranscriptions e Share View			
- → ~ 1	> Transcriptions		ڻ ~	Search Tran
A Ouick	Name	Date modified	Туре	Size
	🗑 Adams-Beth-Malk-05192019-34504479.doc	1/10/2020 10:26 AM	Microsoft Word 9	13 KB
E#	🗑 Adams-John-Arnold-06212019-34588258	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
🕂 🖙	M Apollos-Zebe-Arnold-06212019-3458810	1/10/2020 8:55 AM	Microsoft Word 9	21 KB
😤 E 🖈	Aramonte-Dennis-Arnold-06212019-3458	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
📰 F.#	💼Arnold-11082019-35011016.doc	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
AI P	🗑 Arrowood-Jimmy-Woodard113445.doc	1/10/2020 11:50 AM	Microsoft Word 9	24 KB
Dict	💼 Bales-Johnny-Arnold-05232019-34504518	1/10/2020 8:55 AM	Microsoft Word 9	21 KB
	BLANK-SYSTEM-Arnold-09272019-34588	1/10/2020 8:55 AM	Microsoft Word 9	27 KB
	💼 Calkre-Lisa-Woodard-03092007-42448.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
user	💼 Calkre-Lisa-Woodard-03092007-42450.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
😻 Dropł	🖬 Chresten-Martin-Arnold-06212019-34588	1/10/2020 8:55 AM	Microsoft Word 9	31 KB
🔯 dict	💼 Freeman-Louis-Woodard-06132007-1199	1/10/2020 11:50 AM	Microsoft Word 9	26 KB
St. Enri	🚮 Kline-Mercy-Arnold-06212019-34877487	1/10/2020 8:55 AM	Microsoft Word 9	33 KB
File	💼 McCord-James-Arnold-11202019-345880	1/10/2020 8:55 AM	Microsoft Word 9	33 KB
	💼 Scott-Lewis-Tille-03142007-47908.doc	1/10/2020 11:50 AM	Microsoft Word 9	22 KB
finis	💼 Smith-Alice-Arnold-06212019-34588257	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
🧟 HIP	💼 smith-susie-Woodard-03092007-42449.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
🁧 mec				

The transcribed documents downloaded to the selected location.

# Notes:

5

- 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.



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



# Rejected

2

3

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

3 🖬 合 🖗 🔍	Search	🗑 Delete	0 🗇			2			1	yr 2y
Documents	=	DID	Dictator	Dictated	Uploaded 🔻	Finis	First	Last	ID #	Enco
	=	34940729	West, Wally	10/08/19 10:07	10/18/19 13:44	12/20/19 14:45	Jessica	Smith	^HIOBFHIL^	
	=	34380676	West, Wally	04/15/19 15:14	04/15/19 15:18	04/19/19 15:49	Jessica	Smith	^HIOBFHIL^	
ling	=	33533576	West, Wally	05/30/18 12:51	07/19/18 10:2	4/18 16:57	Jessica	Smith	^HIOBFHIL^	
nbox	=	33968454	West, Wally	05/30/18 12:51	07/19/18 10:2	4/19 15:29	Smith	Anderson	^KFJYUYKB^	
Rejected	=	33533467	West, Wally	05/30/18 12:51	07/19/18 10:05					

The Rejected folder consists of three important areas:

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

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

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



# **Folder Management Functions**

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

# Columns

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

Columns unique to the Rejected are:

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

## Column Management

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

## File Display

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

## File Action Menu

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



# Final

1

2

3

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

🗐 📺 🗃 骨 🦞 Q. Sear	rcł 📑	Open 昌 Pi	rint 🐻	Case Info	. 2	Fax 闠 Delete 🌘	0 🕫		$\langle J \rangle$			1yr 2y
filter		DID	6 2	۵		Dictator	Dictated	Uploaded	Finished <b>V</b>	First	Last	ID #
		34588241				Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	05/26/20 12:12	Alice	Smith	1002345
n Radiology	=	34588255				Arnold, Jimmy	06/21/19 13:53	06/21/19 13:57	05/26/20 12:06	Hugh	Arnold	57693
Iding	=	34877483				Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:57	Dennis	Aramonte	28365652
Inbox	=	35137852				Arnold, Jimmy	12/18/19 13:38	12/18/19 13:40	04/20/20 13:09	SYSTEM	BLANK	SYS-BLANK
Rejected	=	35137844				Arnold, Jimmy	12/18/19 13:36	12/ 3	04/20/20 09:39	Allison	Smith	10013
Final	=	35068759				Arnold, Jimmy	11/26/19 12:32	11/2	04/20/20 09:37	SYSTEM	BLANK	SYS-BLANK
J. Arnold T. Bales	=	35246373				Arnold, Jimmy	01/27/20 13:09	01/27/20 13:11	04/20/20 09:35	SYSTEM	BLANK	SYS-BLANK
						Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:35	SYSTEM	BLANK	SYS-BLANK

The Final folder consists of three important areas:

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

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

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



# **Folder Management Functions**

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

# Columns

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

Columns unique to the Final folder:

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

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

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

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

## Column Management

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



# **File Display**

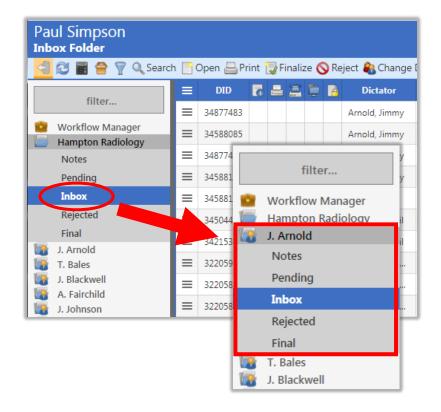
This section displays transcriptions that have been finalized by the Healthcare Provider. All visible transcriptions in this folder are of the Finalized status. For a detailed description of available file statuses and their meaning, see page 77.

# File Action Menu

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



# Healthcare Provider Folders



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

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



# **Document Management**

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

# Automatic faxing (auto-fax)

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

# Auto Print

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

## **File Status**

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

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

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

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

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

<u>Delivered</u>: this status is a combined term for both Inbox and Finalized transcriptions.

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

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

# **Document Locking**

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



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

			Folde			
🧲 🔁 🔚 音 🍸 🔍 Sea		👕 Finalize 🚫 Reject 🚷 Change Dictator 🚍 Fax	Case Info 🍵	Delete 🕜 💭		
	35109384					
	34588166	Adversed Ora	Mailer, Gerald	06/21/19 14:07	Shari	
Workflow Manager	34504486	File locked by another user	old, Jimmy	05/23/19 15:33	Franklin	
My Documents	34504489	- 	old, Jimmy		Jessica	
	34393987	Another user has this document open. It has been locked to prevent editing. Any changes made will not be saved.	n, Ashish	04/18/19 15:12		
	34290097	Any changes made will not be saved.	old, Jimmy		Ryan	
	≡ 34215312	Click below to open a read-only copy or Cancel to exit.	child, April	02/25/19 10:11	Marcia	
	33737755		d, Samual		Alberts	
M. Abbott	33737752	Open read-only Cancel	ding, David	09/11/18 09:18	Albert	
S. Ackerman	33499492		d, Samual	03/01/18 14:12	Lorie	
N. Adair A. Ahmed	33499490	Maplewood S	Reed, Samual	03/20/18 11:26	Jane	
N. Ahmedli	≡ 33499096	Maplewood S	Conner, Charl			

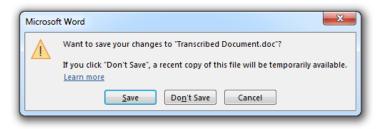
# Edit

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

es 🔻	≡	DID	o	-	2	٦	1	Facility	Note	Dictato		Dictated Date	First	Last	ID #
	≡	35109384					A	Fidelity Insuran		Bales, Lowen		12/10/19 12:05	Mike	Salyers	123456
	≡	34588166						Advanced Orth		Miller, Gerald	1	06/21/19 14:07	Shari	Deming	102938
AutoSave 💽 🌐 りゃ () 🗎 ャ マ 35109384-transcription-76523852.doc - Co Sign in 📧 - 🗆 🗙										29911					
												Sian in			
e1.									•				· -		1238366
File H	lome	Insert		sign		Layo	ut		Mailings Revie		Help		· -	Share 🖓	1238366 SYS-BLANK
File File	lome	Insert	De	sign				References M	•	w View			•		
File	Cal	Insert	De 11	sign	A A	Layo	а т	References M A <sub>Ø</sub>	Mailings Revie	w View	aBbCc	⊃ ,	AaBbC	Share 🖵	SYS-BLANK

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





# Interfacing

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



# Settings View

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# **Settings View Overview**

1

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

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

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

Vista Developmental Settings	Services DrJTaylor   5.8.340   <u>report bug</u> Folders <u>Settings</u> Reports Logou
My Settings Change Password Fax Log 1	Change Password Current Pas New Passw Confirm Pas Passwords must be at least 8 characters in provide the contain at least one number, special character, or upper case letter.
	Change

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

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



# Settings Pane

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

## **User Section**

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

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

V Falled Faxes 🛲 Res	end Selected 🥖	Export Failure	res for Month					_
My Settings	did, nar	ne, or fax nu	umb Search	Clear				
Change Password	DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue D
Fax Log	33533575	James Smith	(555) 555-5555	failure	Calls to 555 n	Smith Anders	07/19/18 10:27	03/19/19 1



# **My Settings**

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



Change Password is used for password updating.

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

# Change Password

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

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

# Fax Log

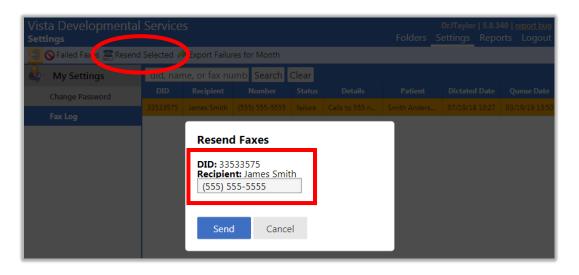
The "Fax Log" is a listed of all faxes transmitted by the Facility. The "Fax Log" toolbar contains a number of tools, which are described below.

## Failed Faxes

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



# **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 Developmenta Settings							DrJTaylor   5.8.3 Settings Repo				
Selected I Export Failures for Month											
& My Settings	My Settings did, name, or fax numb Search Clear										
Change Password	DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Date			
change Password	33533575	James Smith	(555) 555-5555	failure	Calls to 555 n	Smith Anders	07/19/18 10:27	03/19/19 13:50			
Fax Log											



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

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

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

**Status**: "failure" means the fax failed to transmit successfully. "success" means the fax transmitted successfully.

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

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

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

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

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



# **Reports View**

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# Reports

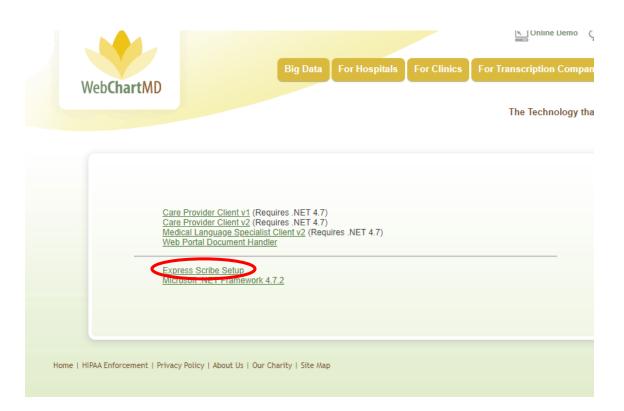
<u>Reports Per Day</u> – This report can be run by the Healthcare Provider and shows the total number of reports transcribed (by day) for a given time frame.

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



# **Appendix 1: Express Scribe**

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



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

#### For Windows 7 users:

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



9	Installing Express Scribe v 5.10	
	License Agreement	
	Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.	
	1. The corpights in this achieves and any visual or audo work distributed with the schware is a being to IAC Software in clones tied on the about book. All rights are researed. Installation of this software is a locened only in accordance with these terms. 2. By installing, using or distributing the software is using our own belf and on behalf of your employer or principal, agree to be bound by these terms. J'you do not agree to any of these terms is a software in the software is using our constraints the software is used to be software the software is a software in the software is used to be bound by these terms. J'you do not agree to any of these terms is a software in the software is used to be software the software is used to be software the software is used to be software in the software is used to be software in the software is used to be software is a software is used to be software in the software is used to be software is a software is used to be software is a software is used to be software is an original term of the use of this software induced, but not the table for any loss attemption of the use of this software inducing, but not do takes to any close the software is any close where the software is any close the software is any close the software in any close the software is any close the software in any close term of the use of this software is any close the software is any close to software is any close the software isoftware isoftwar	
	Next Ca	ncel

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

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

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

#### For Windows 8/10 only:

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



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

						Soline Demo 🦕
			Big Data	For Hospitals	For Clinics	For Transcription Companie
	Web <b>ChartMD</b>					The Technology that I
	Care Pr Medica	rovider Client v1 (Re rovider Client v2 (Re I Language Specialis ortal Document Hand	quires .NET 4.7) t Client v2 (Requ			
	Expres: Microso	Open lin	k in new <u>t</u> ab k in new <u>w</u> indow k in incognito wi			
Home   HIPAA Er	forcement   Privacy Policy   A	Save lin <u>k</u> Copy link	as addr <u>e</u> ss			
		l <u>n</u> spect		Ctrl+Shift+I		

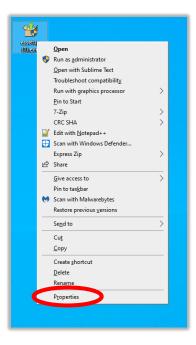
When the user clicks 'Save link as' they will be presented with a 'Save As' window. From here the user will need to save the download to their desktop.

Save As			×
	→ Th	is PC > Desktop v Ö Search Desktop	Q
Organize 🔻 Ne	w fold	er Bill	- ()
💻 This PC	^	Name	Dati ^
		🗊 Microsoft Teams	4/13
Desktop		📂 WCMD.Win.WebChartMD.exe - Shortcut	3/2/
		😥 GoToMeeting	2/2(
Downloads		👧 Continue WordPerfect Office X9 Installation	2/12 🗸
	~	<	>
File <u>n</u> ame:	esset	up (1).exe	~
Save as type:	Appli	cation (*.exe)	~
∧ Hide Folders		Şave	Cancel .::

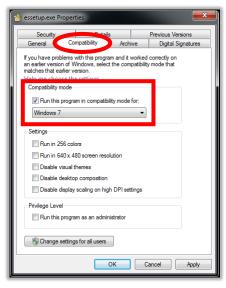
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To set the Installation in Compatibility Mode on Windows 8 and 10, user needs to go to the Properties of the downloaded essetup.exe. To do so, right-click the installer and go to 'Properties' at the bottom of the window presented



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





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.

		×
9	Installing Express Scribe v 5.10	
	License Agreement	
	Please read the following License Agreement. You must accept the terms of this agreement befo continuing with the installation.	re
	<ol> <li>The coopertian in its orthors and any visual or audio work databased with the software bloop to NCH Software in licensed only in accordance with three terms.</li> <li>That all audio of this database and others lated in the audio tox. All database in licensed only in accordance with three terms.</li> <li>De Installing using of database its installation of this adhrees in license of the adhrees in license of the adhrees of the adhrees of the adhrees in license of the adhrees in the adhrees of the adhrees of</li></ol>	•
1	I agree with these terms	
	I do not agree with these terms	
	Next	ancel

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.



Express	<u>O</u> pen	
Scribe	Run with graphics processor >	
	Open file location	
•	Run as <u>a</u> dministrator	
	Open with Sublime Text	
	Troubleshoot compatibility	
	Pin to Start	
	7-Zip >	
	CRC SHA	
	Y Edit with Notepad++	
E	Scan with Windows Defender	
	Express Zip >	
	Pin to tas <u>k</u> bar	
	Scan with Malwarebytes	
	Restore previous $\underline{v}$ ersions	
	Se <u>n</u> d to	
-	Cu <u>t</u>	
_	<u>С</u> ору	
	Create <u>s</u> hortcut	
	<u>D</u> elete	
	Rena <u>m</u> e	
	P <u>r</u> operties	

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

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

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

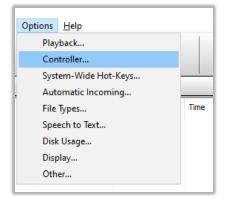
# Setting Up Food Pedal:



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

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

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



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



Diek	Usage		Display		Other
layback	Controller	Hot-Keys	Incoming	File Types	Speech to
			inconing	The types	opeoente
Enable hand	d-held or foot pe	edal controller			
Active co	ntroller				
Controlle	r.	None			
Status:		Not configured			
	Proper	ties		Command map / t	test
Change a	ctive controller				
		C			
		Control	ler setup wizard.		
		Control	ler setup wizard.		
- Tap lock		Control	ler setup wizard.		
	le tap lock	Control	ler setup wizard.		
Enab	le tap lock nable unlock tir		er setup wizard.		_
Enab			ler setup wizard.		
Enab		ne-out		 a controller	
Enab	nable unlock tir	ne-out			
Enab	nable unlock tir	ne-out			
Enab	nable unlock tir	ne-out			
Enab	nable unlock tir	ne-out			
Enab	nable unlock tir	ne-out			

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