



# **Master User Manual**

Transcription Company Administrator Version

**Revised May 11, 2020**

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## Welcome to WebChartMD!

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

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

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

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

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

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

Sincerely,

The team at WebChartMD

## Glossary of Terms

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

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

Dictator: A user that authors the voice files.

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

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

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

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

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

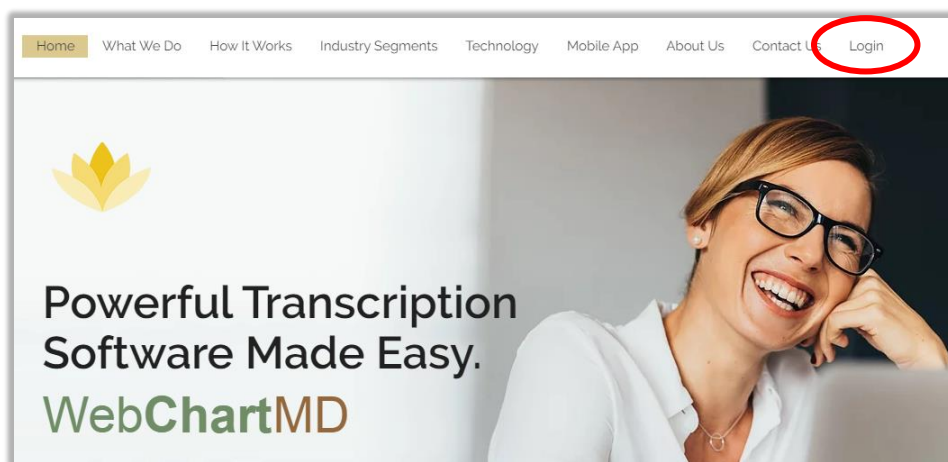
Transcriber: A user that listens to the audio dictations and types it into Word as text.

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

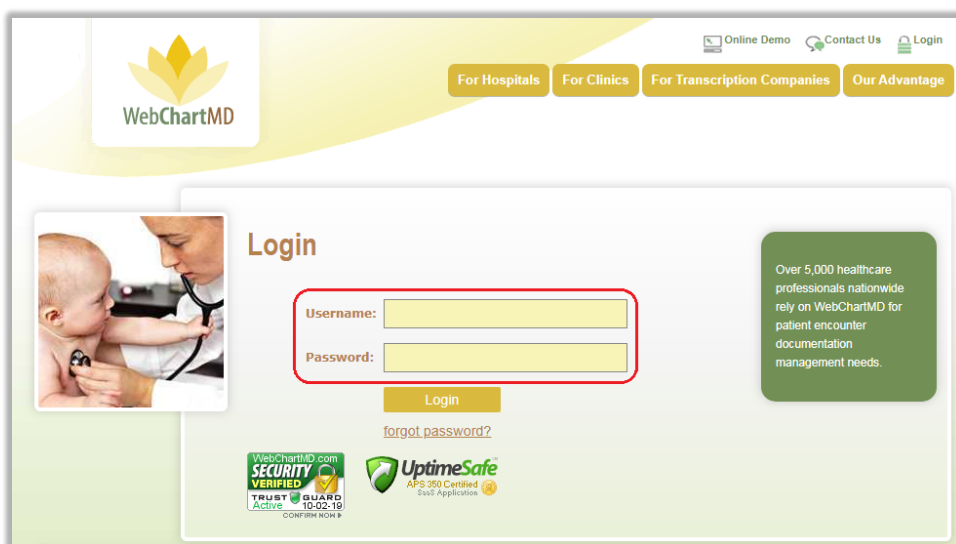


## Logging into the Portal

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



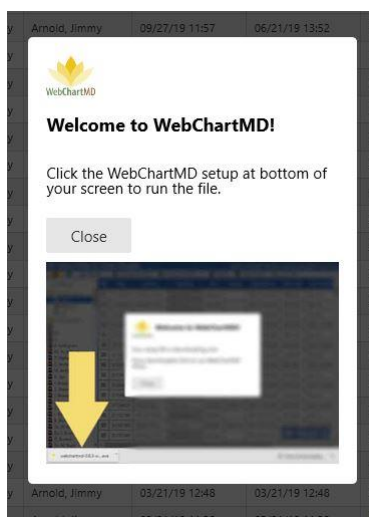
Enter your username and password in the fields and click on the Login button. If the username and password are correct, it will log in to the portal. If incorrect, a message will be displayed indicating that it is incorrect.



## Software Installation

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

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

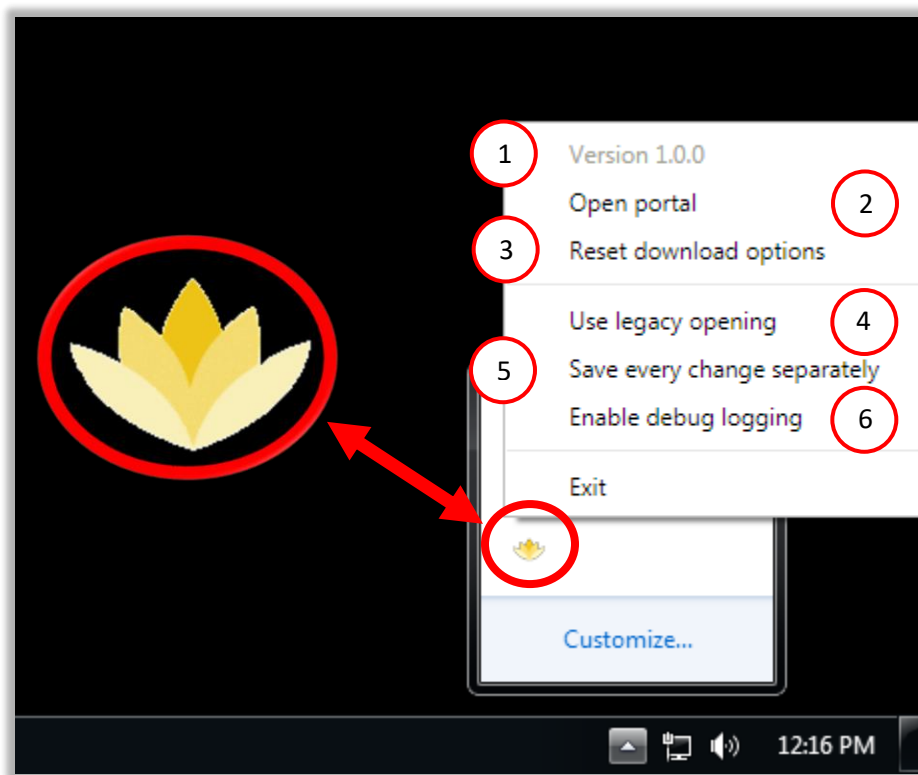


Once the download is complete, click the downloaded file to install it.

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

### DocHandler

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

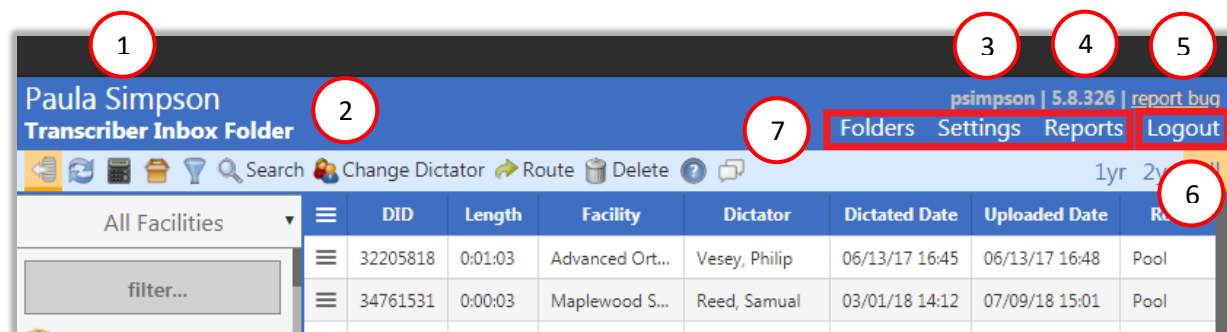


Right mouse-clicking the logo causes the following menu items to appear:

- 1 Version number: The current version of the DocHandler. The DocHandler updates automatically when new versions are available.
- 2 Open portal: Clicking this option launches the WebChartMD Login page. WebChartMD is compatible with Internet Explorer (version 10 and 11), Google Chrome, Mozilla Firefox, Safari and Opera.
- 3 Reset download options: This option works in conjunction with the Download option of the dictations (on page 55) resetting both the file naming convention and preferred download location as set by the user.
- 4 Use legacy opening: This option is used by WebChartMD support staff to troubleshoot the DocHandler.
- 5 Save every change separately: Checking this option enables the user to manually save edits to a document on demand by using the control+S shortcut or pressing the “save” icon along the top edge of Microsoft Word.

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

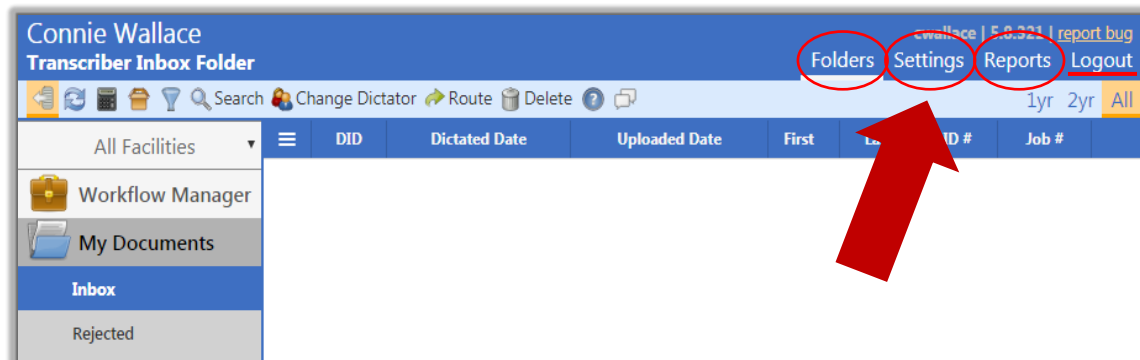
## Initial View When Logging In



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

## 7 System Functional Areas (Views)

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

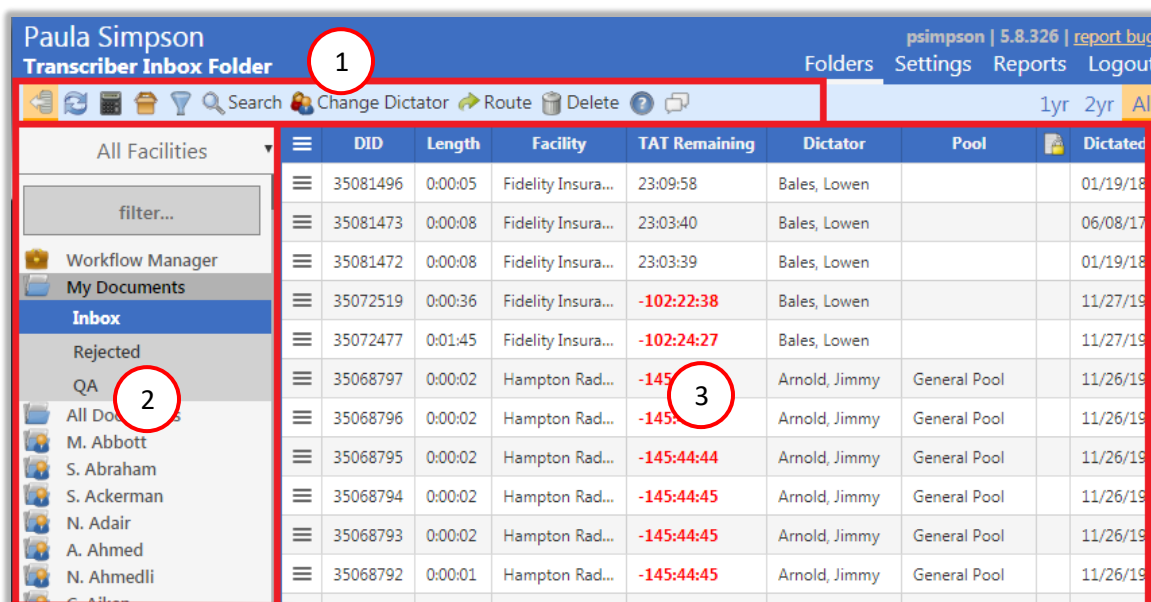


- **The Folders view** displays the folders in which the dictation and transcriptions are accessed. More details can be found on page 19.
- **The Settings view** accesses the various workflow settings used by the Transcription Team and healthcare Facilities. More details can be found on page 102.
- **The Reports view** displays the Reporting suite. More details can be found on page 221.

## Folders View

## Folder View Overview

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



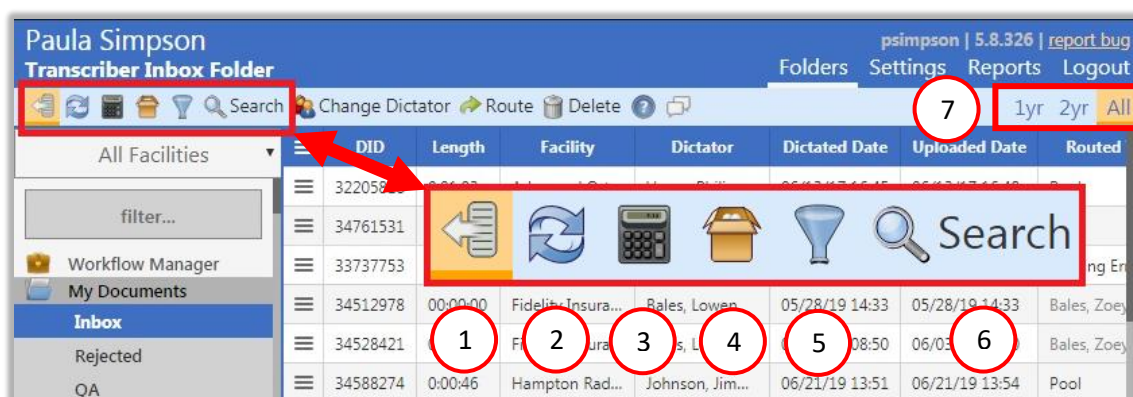
The screenshot shows the 'Paula Simpson Transcriber Inbox Folder' view. The interface is divided into three main sections:

- 1. Workflow Management Toolbar:** Located at the top, it includes buttons for 'Change Dictator', 'Route', 'Delete', and a search icon.
- 2. Folder Pane:** Located on the left, it displays a list of folders including 'Workflow Manager', 'My Documents', 'Inbox', 'Rejected', 'QA', and a list of user folders (All Documents, M. Abbott, S. Abraham, S. Ackerman, N. Adair, A. Ahmed, N. Ahmedli).
- 3. File Display:** The main table area showing a list of dictations with columns: DID, Length, Facility, TAT Remaining, Dictator, Pool, and Dictated. The table lists several dictations from 'Fidelity Insura...' and 'Hampton Rad...'.

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

### Folder Management Functions

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



- 1 **Pin Sidebar** – This toggle button shows or hides the folder pane containing folders below the All Facilities column.
- 2 **Refresh** – Refreshes the data on the page. This can be used to refresh the view after moving columns, changing flags or after closing a document to update the data displayed.
- 3 **Show Totals** – Shows total across the top of dictations in a grey row. This helps the user see the number of dictations and other information at a quick glance without having to calculate. Number of dictations and total length of all audio files are two common uses.
- 4 **Sort By** – Groups the dictations based on selected criteria such as a specific date or a Dictator.
- 5 **Filter** – Adds filter boxes underneath column headers, allowing user to filter the data. The user hides dictations based on excluded data and only views the filtered results.
- 6 **Search** – Allows the user to search the files for specific information.
- 7 **Data Filter** – The labels “1yr”, “2yr” and “All” refer to the age of reports will be visible on screen in the folder. “1yr” shows reports transcribed in the last year. “2yr” shows reports transcribed in the last two years. “All” shows all transcriptions transcribed for any date.

Special notes on the use of this feature:

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



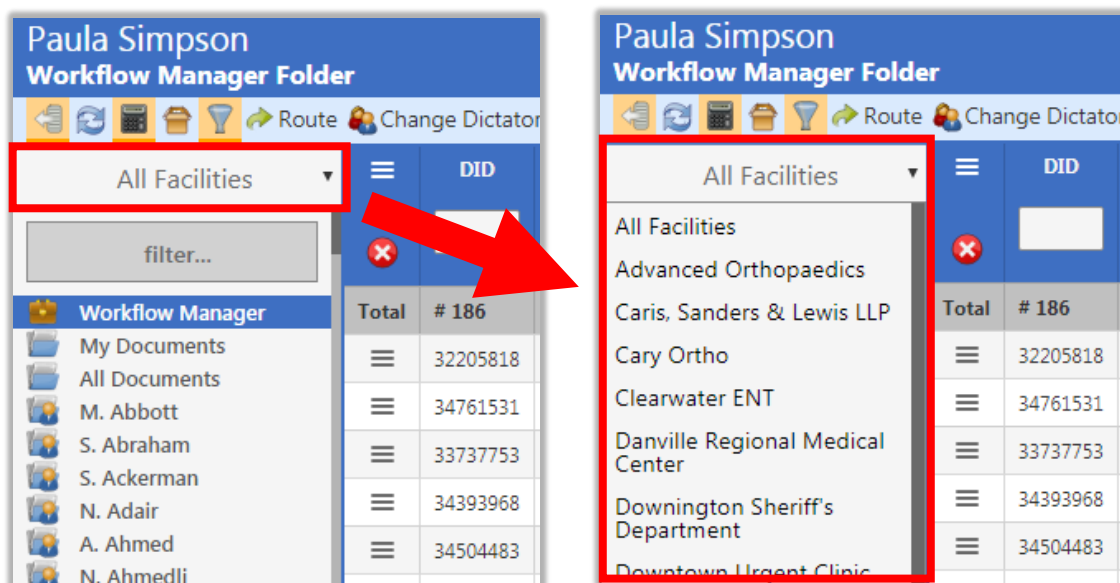
Several other folder management functions appear on the Workflow Management Toolbar, depending on which folder the user is in. Details of these functions are provided in the individual folder details on page 28.

## Folder Pane

On the left side of the screen is the Folder Pane, in which folders are displayed. These folders can be clicked to enter different areas of the workflow. If more than one Facility is serviced by the Transcription Team, a drop down appears in the top-left corner of the Folders view. Clicking this dropdown expands a list of all Facilities serviced by the Transcription Team.

### All Facilities Dropdown

The first entry at the top of this list is “All Facilities” (see below). Choosing All Facilities will list all Dictators serviced by the Transcription Team in the folder pane. Selecting on individual Facility displays only those Dictators at the selected Facility.



The Folder Pane also lists all folders available to the user in the workflow, such as the Workflow Manager, My Documents, All Documents, and the folders for each Dictator serviced by the Transcription Team. Details related to each folder view are described in upcoming sections of the manual.

## Folders

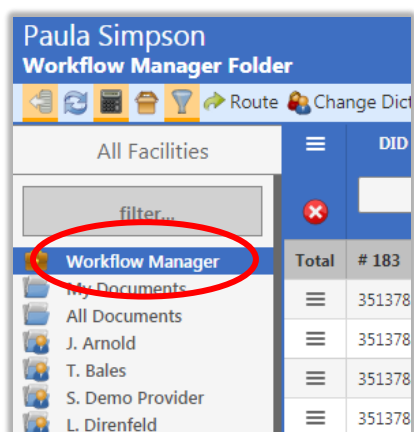
There are four main folder sections that are part of the Folder Pane. They are:

**Workflow Manager:** The “Workflow Manager” is a powerful tool that provides quick and easy access to all dictations and transcriptions available in the system. More information on the Workflow Manager can be found on page 27.

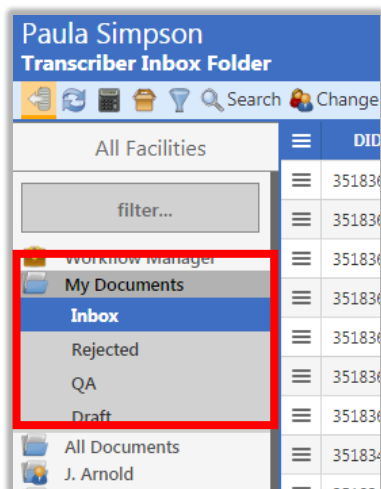
**My Documents:** The “My Documents” shows the dictations and transcriptions to the Transcription Team admin from the Transcription Teams’ point of view. More information on My Documents can be found on page 57.

**All Documents:** The “All Documents” shows the dictations and transcriptions to the Transcription Team admin from the Facility’ point of view. More information on All Documents can be found on page 76.

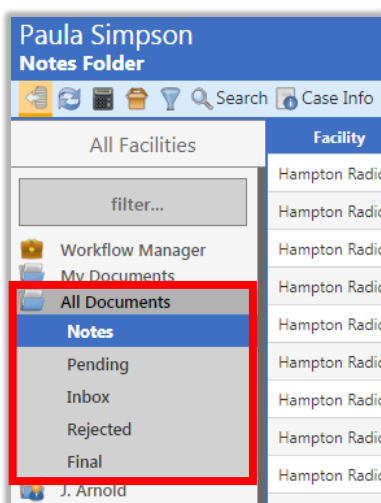
**Dictator Folders:** Below the “All Documents” and its folders are the Dictator Folders. These are laid out alphabetically by the last name of the provider. More information on Dictator Folders can be found on page 91.



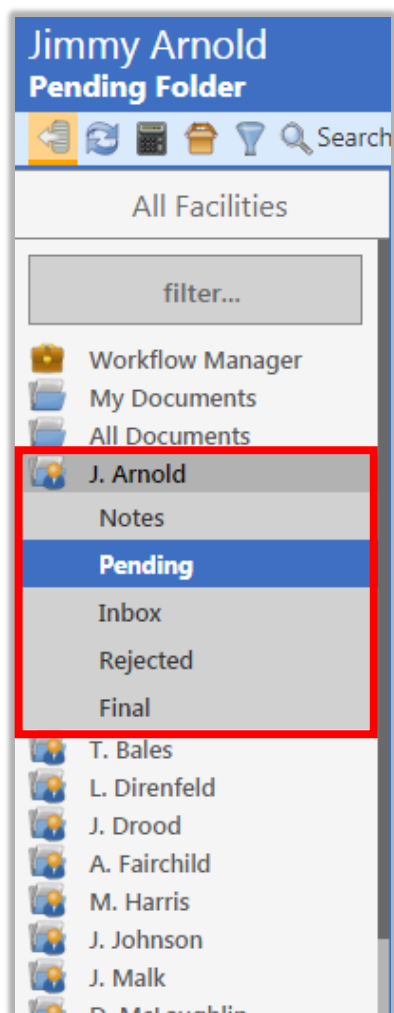
The Workflow Manager folder is selected.



The Inbox folder within “My Documents” is selected.



The Notes folder within “All Documents” is selected.



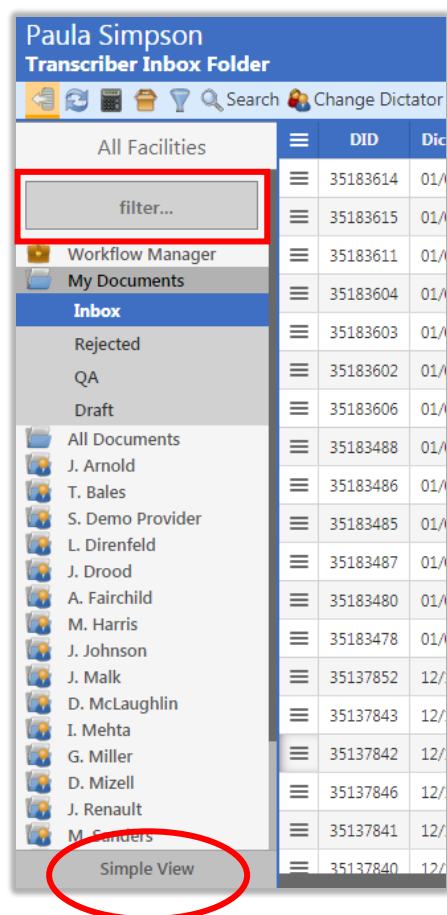
The Pending folder within the “Dictator Folders” for Dictator J. Arnold is selected.

## Folder View Options

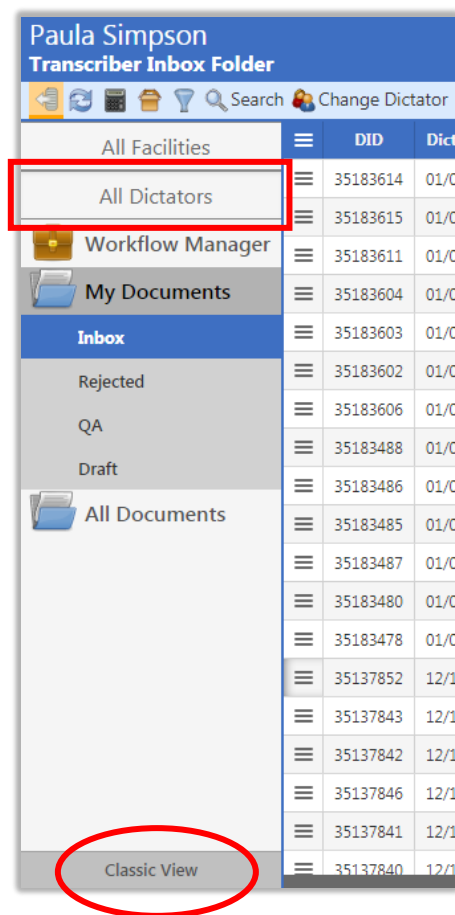
The Folder Pane can present folders in two different views. At the bottom of the Folders Pane a toggle button changes the which switches the view between “Classic View” and “Simple View.”

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

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



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



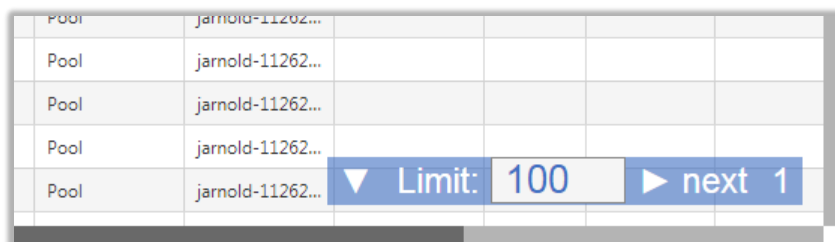
Currently in Simple View. Click the “Classic View” button to move to Classic View.

## File Display

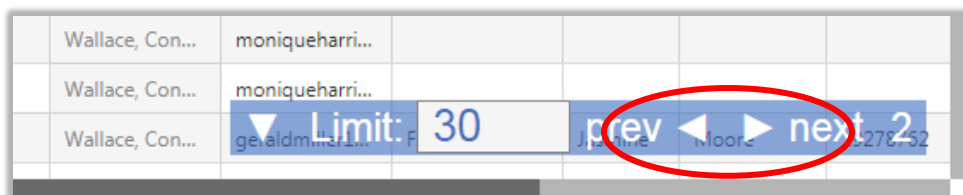
To the right of the Folder Pane is the space for File Display. This display contains a series of rows, each of which represents a dictation, or audio file (if in the Pending folder) or a document if in any other folder. The exception to this rule is the File Display within the Workflow Manager (see page 46), which displays both dictations and transcriptions. The folders visible and their content depend on the User role and their permissions.

### Row and Page Setting

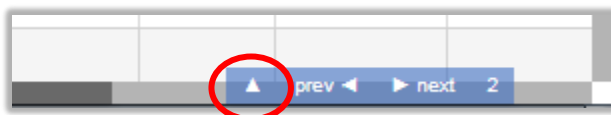
In the bottom right-hand corner of the file display is the row and page setting. The number of rows that are displayed, each row containing a file, can be adjusted in the page numbering block at the bottom right. The default setting of 100 rows per page can be customized by clicking the box containing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



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



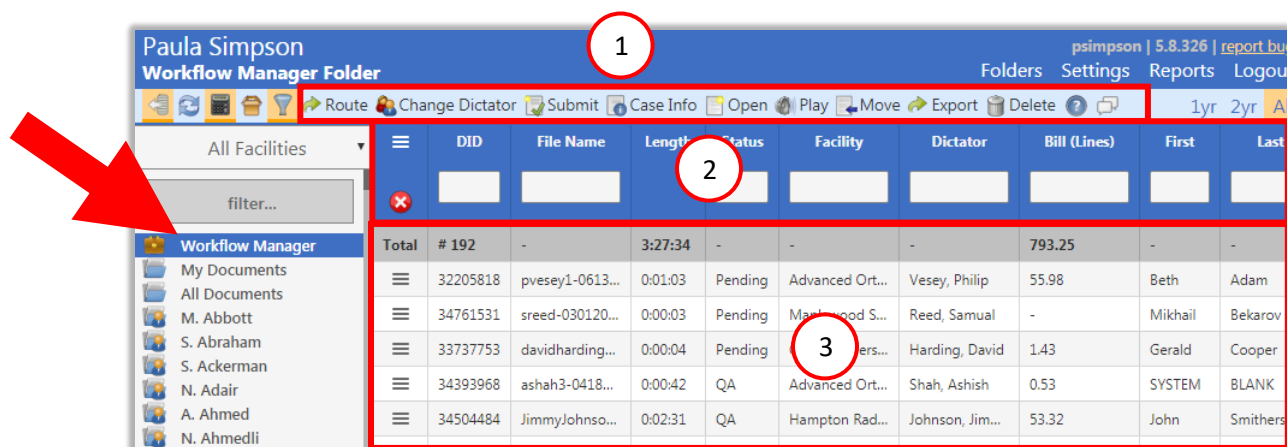
The downward facing arrow to the left of “Limit” minimizes the row and page setting box to a smaller view (see below). Clicking the up-facing arrow while in minimized view restores the default size.



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

## Workflow Manager

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



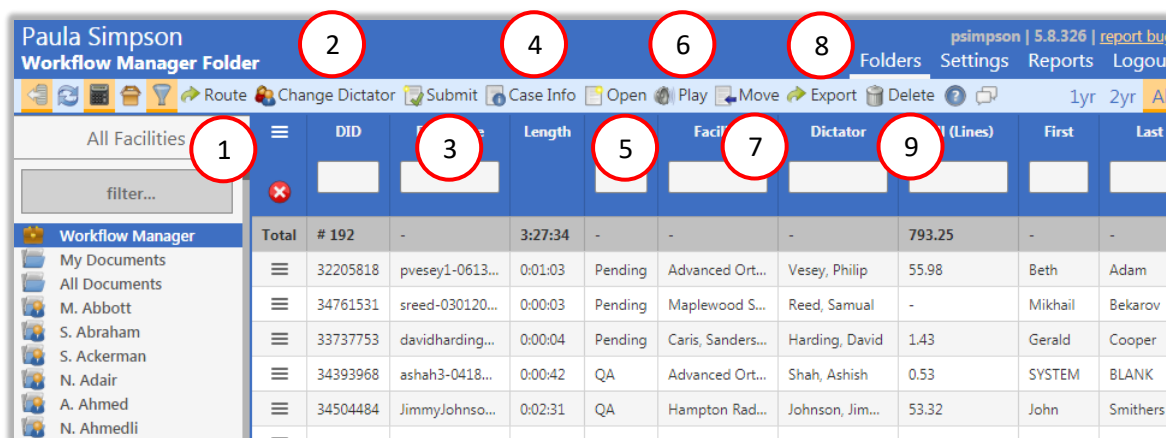
The screenshot shows the Workflow Manager interface. The top ribbon (1) contains buttons for Route, Change Dictator, Submit, Case Info, Open, Play, Move, Export, and Delete. The left folder pane shows 'Workflow Manager' as the first folder. The main table (2) has columns for DID, File Name, Length, Status, Facility, Dictator, Bill (Lines), First, and Last. The table body (3) displays a list of dictations with their respective details.

	DID	File Name	Length	Status	Facility	Dictator	Bill (Lines)	First	Last
Total	# 192	-	3:27:34	-	-	-	793.25	-	-
	32205818	pvesey1-0613...	0:01:03	Pending	Advanced Ort...	Vesey, Philip	55.98	Beth	Adam
	34761531	sreed-030120...	0:00:03	Pending	Mantwood S...	Reed, Samuel	-	Mikhail	Bekarov
	33737753	davidharding...	0:00:04	Pending	ers...	Harding, David	1.43	Gerald	Cooper
	34393968	ashah3-0418...	0:00:42	QA	Advanced Ort...	Shah, Ashish	0.53	SYSTEM	BLANK
	34504484	JimmyJohnso...	0:02:31	QA	Hampton Rad...	Johnson, Jim...	53.32	John	Smithers

The Workflow Manager consists of three important areas:

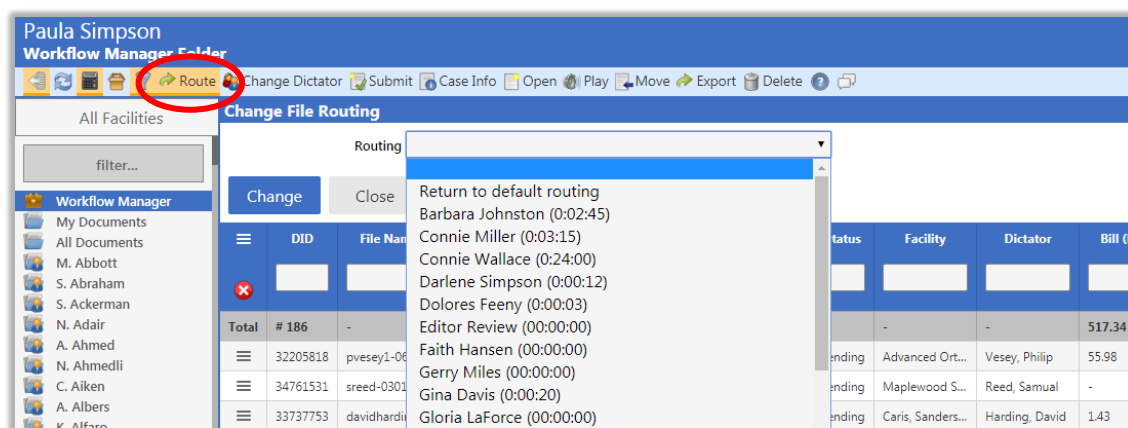
- 1 **Folder Management Functions:** This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Workflow Manager folder.
- 2 **Columns:** Workflow Manager has several important and unique columns that are not visible anywhere else.
- 3 **File Display:** The central section of the Portal displays the files for dictations and transcriptions.

## Folder Management Functions



The first five icons from the left are consistent in all folders and more information on them can be found on page 19. The next nine icons are explained in detail below:

### 1 Route



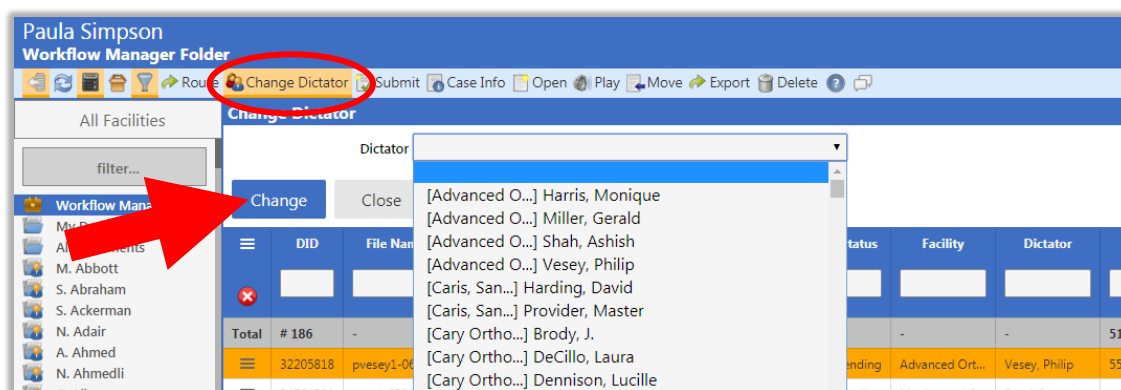
The Route function allows the Transcription Team admins to manually route a dictation to a specific user.

More details on Routing can be found on page 99.

More details on Pools and Transcriptionist queue can be found on page 214.











## 2 Change Dictator



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

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

	DID	Dictator	File Name	Length	Last
					
Total	# 186	-	-	3:17:07	-
	32205818	Vesey, Philip	pvesey1-06132017-154533-71.wav	0:01:03	Simp
	34761531	Reed, Samuel	sreed-03012018-131230-1.dss	0:00:03	,
	33737753	Harding, David	avidharding1-09112018-082116.dss	0:00:04	Simp

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

### 3 Submit

The Submit function is available within the Workflow Manager, QA folder and the Rejected folder for the Transcription Team staff. Submit is used to move a transcription to the next step in the workflow, which in almost all cases will be to submit a completed transcription from the QA workflow and into the Dictator's Inbox. In workflows with multiple tiers of QA, pressing Submit will move the transcription from the Tier 1 QA Editor to the Tier 2 QA Editor.

### 4 Case Info

Paula Simpson  
Workflow Manager Folder

psimpson | 5.8.326 | [report bug](#)

[Folders](#) [Settings](#) [Reports](#) [Logout](#)

[Route](#) [Change Dictator](#) [Submit](#) [Case Info](#) [Open](#) [Play](#) [Move](#) [Export](#) [Delete](#) [1yr](#) [2yr](#) [All](#)

All Facilities

filter...

Workflow Manager

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

Case Info

Search Patient

First Name

Date of Birth

Report Type

Billing Codes

Date of Visit





Last Name

ID #

Note

Location

[Update Case](#) [Close](#)

	DID	Facility	Dictator	Length	First	Last	Status	Report Type	Last Modified	Routed To
	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>				
Total	# 184	-	-	3:15:22	-	-	-	-	-	-
	34761531	Maplewood S...	Reed, Samuel	0:00:03	Mikhail	Bekarov	Pending			Pool
	33737753	Caris, Sanders...	Harding, David	0:00:04	Gerald	Cooper	Pending	OFFICE NOTE	Simpson, Paula	Routing Error
	34504483	Hampton Rad...	Fairchild, April	0:02:31	Jason	Bell	QA	SCH TEST	Bales, Zoey	Wallace, Con...

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 Dictator / 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.

## 5 Open

“Open” is a permission-based function which enables users to open transcriptions using the Microsoft Word software installed on the local computer. Microsoft Word is accessed by WebChartMD’s DocHandler (see page 14 for more information on the DocHandler). If the DocHandler is not installed (or if the user does not have edit permission), transcriptions will open in a non-editable PDF format.

Documents can be opened individually or in batches.

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

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

Paula Simpson  
Inbox Folder

Search Open Print Finalize Reject Change Dictator Fax Case Info Delete

All Facilities	DID	Facility	Note	Dictator	Dictated Date
filter...	34588166	Advanced Orth...		Miller, Gerald	06/21/19 14:07
Workflow Manager	34504486	Hampton Radi...		Arnold, Jimmy	05/23/19 15:33
My Documents	34504489	Hampton Radi...		Arnold, Jimmy	05/23/19 15:30
All Documents	34393987	Advanced Orth...		Shah, Ashish	04/18/19 15:12
Notes	34290097	Hampton Radi...		Arnold, Jimmy	03/15/19 18:01
Pending	34215312	Hampton Radi...		Fairchild, April	02/25/19 10:11
Inbox	33737755	Maplewood Su...	Note	Reed, Samuel	09/11/18 09:23
Rejected	33737752	Caris, Sanders ...	Here's a note	Harding, David	09/11/18 09:18
Final	33499492	Maplewood Su...		Reed, Samuel	03/01/18 14:12
M. Abbott	33499490	Maplewood Su...		Reed, Samuel	03/20/18 11:26
S. Abraham					

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

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

Paula Simpson  
Inbox Folder

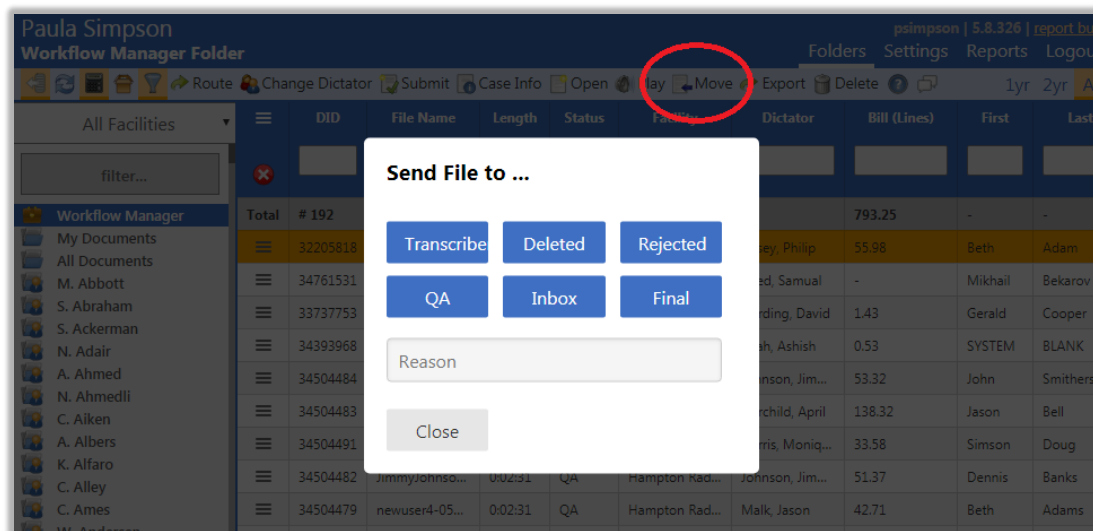
Search Open Print Finalize Reject Change Dictator Fax Case Info Delete

All Facilities	DID	Facility	Note	Dictator	Dictated Date
filter...	34588166	Advanced Orth...		Miller, Gerald	06/21/19 14:07
Workflow Manager	34504486	Hampton Radi...		Arnold, Jimmy	05/23/19 15:33
My Documents	34504489	Hampton Radi...		Arnold, Jimmy	05/23/19 15:30
All Documents	34393987	Advanced Orth...		Shah, Ashish	04/18/19 15:12
Notes	34290097	Hampton Radi...		Arnold, Jimmy	03/15/19 18:01
Pending	34215312	Hampton Radi...		Fairchild, April	02/25/19 10:11
Inbox	33737755	Maplewood Su...	Note	Reed, Samuel	09/11/18 09:23
Rejected	33737752	Caris, Sanders ...	Here's a note	Harding, David	09/11/18 09:18
Final	33499492	Maplewood Su...		Reed, Samuel	03/01/18 14:12
M. Abbott	33499490	Maplewood Su...		Reed, Samuel	03/20/18 11:26
S. Abraham					

## 6 Play

This function loads the audio file of the dictation into the default player of the computer. More information about Express Scribe software can be found on page 264.

## 7 Move



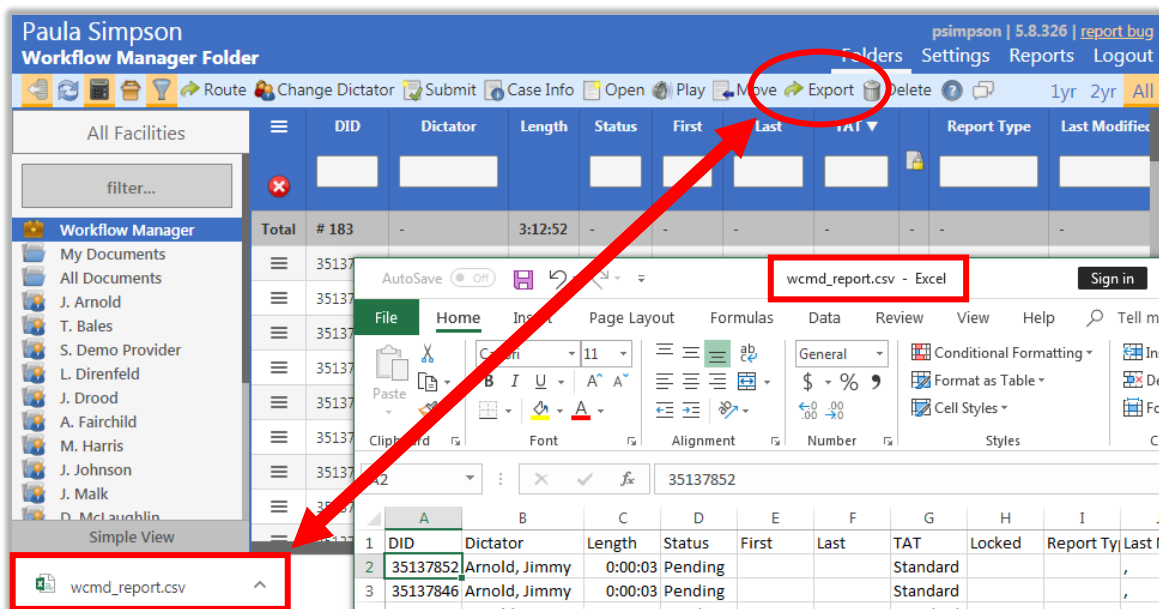
The “Move” function is only available in the Workflow Manager. This function allows the user to move a dictation or transcription into a different stage of the workflow. “Move” options available are:

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

See page 19 for detailed descriptions of folders.

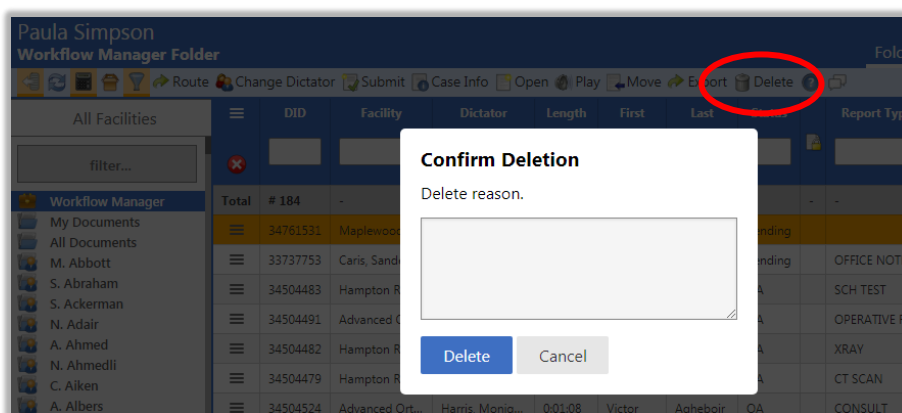
Note: Since use of the “Move” feature represents a change in the normal workflow, the feature includes a “Reason” text box, which is captured in the audit trail.

## 8 Export



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

## 9 Delete

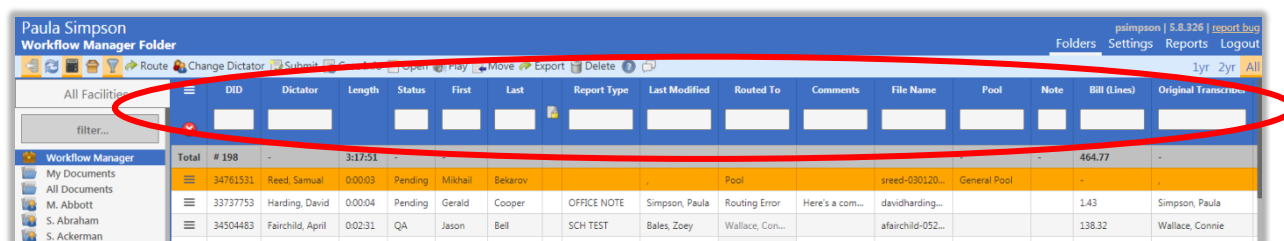


This function allows the user to delete a dictation or transcription. “Delete” is a permission-based feature (see Settings section, page 142).

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

## Columns

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



	DID	Dictator	Length	Status	First	Last	Report Type	Last Modified	Routed To	Comments	File Name	Pool	Note	Bill (Lines)	Original Transcription
Total	# 198		3:17:51											464.77	
	34761531	Reed, Samuel	000:03	Pending	Mikhail	Beharav			Pool		street-030120...	General Pool			
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	OFFICE NOTE	Simpson, Paula	Routing Error	Here's a com...	davidharding...		1.43		Simpson, Paula
	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	SCH TEST	Bales, Zoey	Wallace, Con...		afaichild-052...		138.32		Wallace, Connie

Here are the column descriptions in details:

**Bill (Lines):** This displays the number of lines that the Transcription Team charges the dictator/Facility for this transcription. See page 190 for a full description of Bill Lines.

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

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

**Comments:** The comments is a free text field in the transcription tool that the Transcriptionist can use to write notes about a transcription.

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

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

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

**DID:** This is a unique 8-digit number assigned to every dictation in the system and is used for tracking and File identification purposes. WebChartMD asks that users refer to Files in helpdesk

interactions via the DID for HIPAA purposes. In cases where multiple patients are dictated on the same audio file, copies made of the audio file will each receive a unique DID.

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

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

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

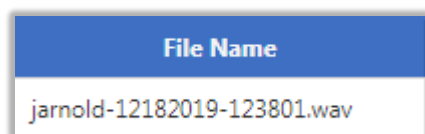
eSigned: This column displays if the transcription has been electronically signed by the Dictator.

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

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

Facility Name: This column displays the name of the Dictator's Facility

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



"jarnold" – dictator's 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.

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

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

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

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

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



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

Length: This column displays the length of the audio file.

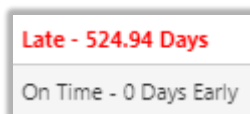
Location: For facilities using multiple locations.

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

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

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

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



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

Original Transcriber: The Transcriptionist’ name that transcribed the initial document.

Pay (Lines): This displays the number of lines that the Transcriptionist typed while initially transcribing the document. See page 164 for a full description of Pay Lines.

Pool: This column displays the name of the pool to which the dictation is assigned. Once the file is routed to a transcriptionist within the pool, the pool name is removed from the column and replaced with the transcriptionist or editor’s name in the “Routed To” column. If the dictation is returned to the pool, the pool name once again appears in the Pool column.

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

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

Report Type: This column displays the name assigned to the template in the Template Manager. See page 191 for a full description of the Template Manager.

Routed To: This column displays the name of the transcriptionist or editor currently assigned a dictation or transcription. See page 99 for a full description of Routing.

Status: This column displays the status of the file. See page 96 in the Document Management section for a full description of all Statuses.

**TAT Remaining:** This column displays the time remaining until the file becomes late. The TAT (turn-around time) calculation starts with the Upload Date and Time, and the priority set by the Dictator/Transcription Team on that dictation.

**TAT:** this column displays the turn-around time assigned to a dictation. See page 167 for a full description of dictation Priority & TAT setup.

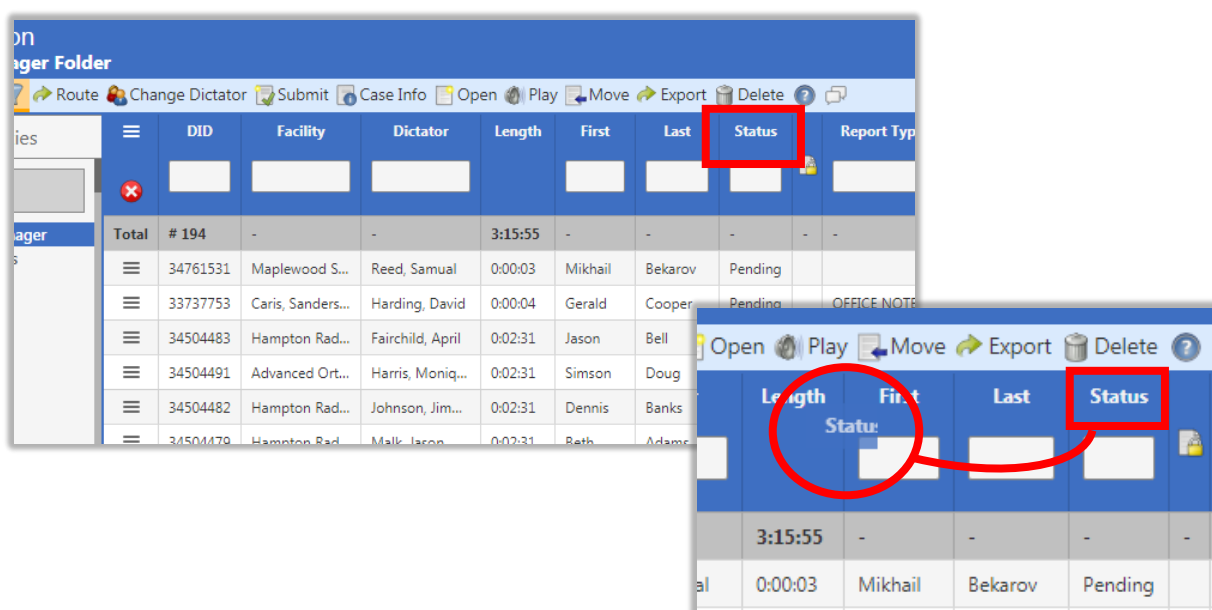
**Upload Date and Time:** this column displays the date and time when dictations upload into the database.

## Column Management


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


### Rearranging


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





er


 Change Dictator


 Submit


 Case Info


 Open


 Play








 Move

 Export

 Delete

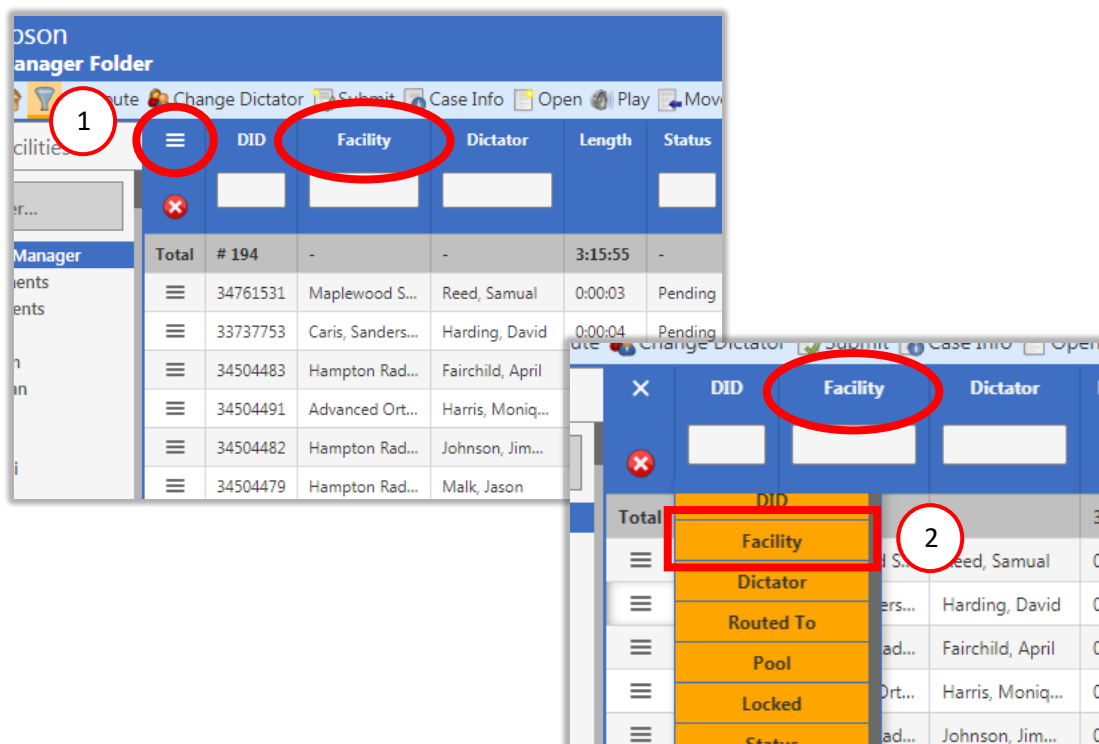
 ?



	DID	Facility	Dictator	Length	Status	First	Last		Report Type
									
Total	# 194	-	-	3:15:55	-	-	-	-	-
	34761531	Maplewood S...	Reed, Samuel	0:00:03	Pending	Mikhail	Bekarov		
	33737753	Caris, Sanders...	Harding, David	0:00:04	Pending	Gerald	Cooper		OFFICE NOTE
	34504483	Hampton Rad...	Fairchild, April	0:02:31	QA	Jason	Bell		SCH TEST
	34504491	Advanced Ort...	Harris, Moniq...	0:02:31	QA	Simson	Doug		OPERATIVE R
	34504482	Hampton Rad...	Johnson, Jim...	0:02:31	QA	Dennis	Banks		XRAY

### 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).

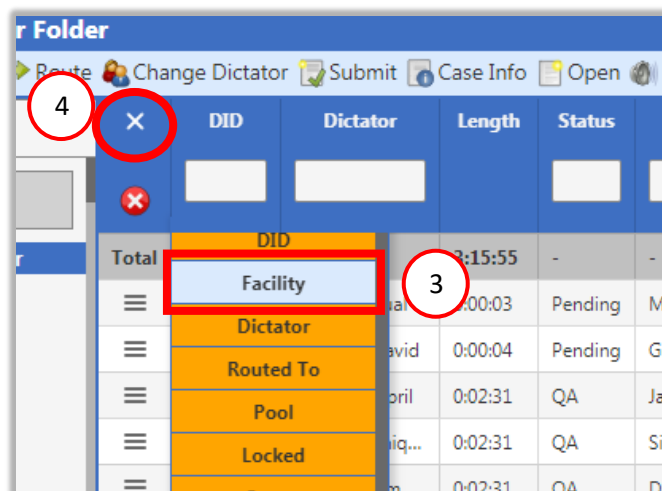


1

2

3

4



### Quick Search

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

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

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Folders Settings Reports Logout

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

All Facilities

filter...

Workflow Manager

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

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

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

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Folders Settings Reports Logout

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

All Facilities

filter...

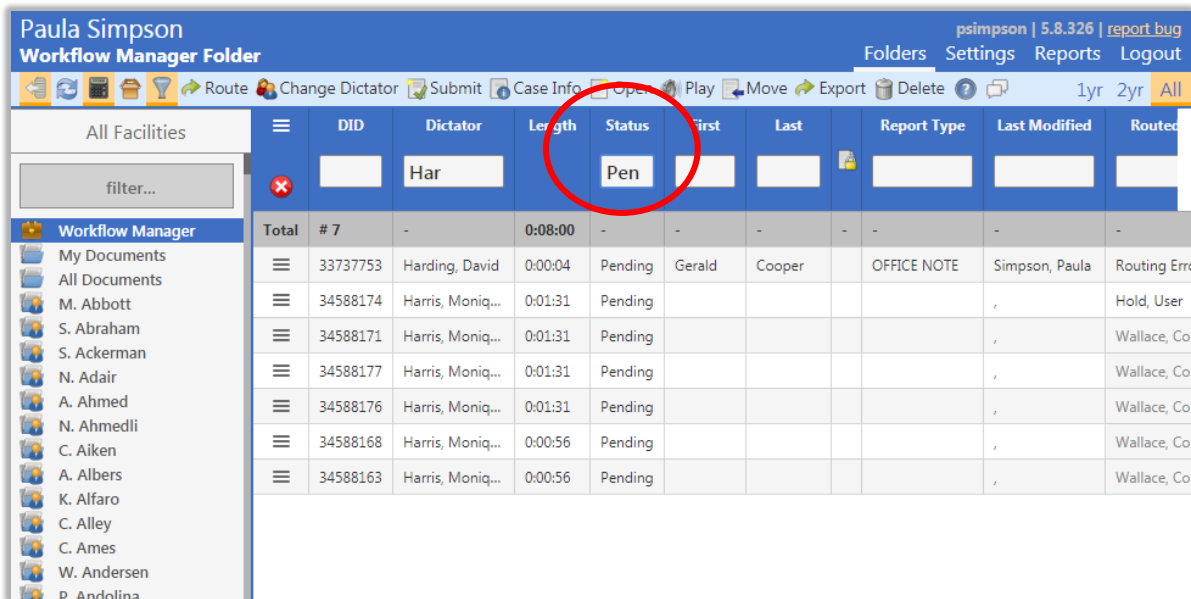
Workflow Manager

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

	DID	Dictator	Length	Status	First	Last	Report Type	Last Modified	Routed
Total	# 11	-	0:14:48	-	-	-	-	-	-
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	OFFICE NOTE	Simpson, Paula	Routing Em
	34504491	Harris, Moniq...	0:02:31	QA	Simson	Doug	OPERATIVE R...	Bales, Zoey	Wallace, Co
	34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir	CONSULT	Simpson, Paula	Wallace, Co
	34504604	Harris, Moniq...	0:02:21	QA	Nancy	Comstock	DISCHARGE S...	Bales, Zoey	Wallace, Co
	34504629	Harris, Moniq...	0:00:48	QA	Greg	Jones	OPERATIVE R...	Wallace, Con...	Wallace, Co
	34588174	Harris, Moniq...	0:01:31	Pending					Hold, User
	34588171	Harris, Moniq...	0:01:31	Pending					Wallace, Co
	34588177	Harris, Moniq...	0:01:31	Pending					Wallace, Co
	34588176	Harris, Moniq...	0:01:31	Pending					Wallace, Co
	34588168	Harris, Moniq...	0:00:56	Pending					Wallace, Co
	34588163	Harris, Moniq...	0:00:56	Pending					Wallace, Co

Results: In this example (above) typing the first few characters (Har) of the Dictator's name filters all dictations and transcriptions down to those matching dictator names matching that search criteria (Harris and Harding).

Step 3: A further level of search refinement is to filter only on dictations that are in a Pending status.



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Workflow Manager Folder

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Folders Settings Reports Logout

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

All Facilities

filter...

Workflow Manager

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

	DID	Dictator	Length	Status	First	Last	Report Type	Last Modified	Routed
Total	# 7	-	0:08:00	-	-	-	-	-	-
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	OFFICE NOTE	Simpson, Paula	Routing Error
	34588174	Harris, Moniq...	0:01:31	Pending					Hold, User
	34588171	Harris, Moniq...	0:01:31	Pending					Wallace, Co
	34588177	Harris, Moniq...	0:01:31	Pending					Wallace, Co
	34588176	Harris, Moniq...	0:01:31	Pending					Wallace, Co
	34588168	Harris, Moniq...	0:00:56	Pending					Wallace, Co
	34588163	Harris, Moniq...	0:00:56	Pending					Wallace, Co

This is accomplished by adding all or part of the word "Pending" in the Status column.

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

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

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Folders Settings Reports Logout

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

All Facilities

filter...

Workflow Manager

- My Documents
- All Documents
- M. Abbott
- S. Abraham
- S. Ackerman
- N. Adair
- A. Ahmed
- N. Ahmedli
- C. Aiken
- A. Albers
- K. Alfaro

	DID	Dictator	Length	Status	First	Last	TAT	Report Type	Last Modified	Route
Total	# 2	-	0:01:35	-	-	-	-	-	-	-
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Paula	Routing
	34588171	Harris, Moniq...	0:01:31	Pending			2hr STAT			Wallace

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

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

### Sorting

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

The unsorted TAT column header:

Paula Simpson

Workflow Manager Folder












psimpson | 5.8.326 | [report bug](#)

Folders

Settings

Reports

Logout

1yr

2yr

All

All Facilities

filter...

Workflow Manager

My Documents

All Documents

M. Abbott

S. Abraham

S. Ackerman

N. Adair

A. Ahmed

N. Ahmedli

S. Aiken

A. Albers

K. Alfaro

C. Alley

C. Ames

W. Andersen

P. Andolina

S. Andrew

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

The TAT column header in ascending sort:

Paula Simpson

Workflow Manager Folder












psimpson | 5.8.326 | [report bug](#)

Folders

Settings

Reports


Logout


           1yr 2yr All


All Facilities


filter...


Workflow Manager


 My Documents


 All Documents


 M. Abbott


 S. Abraham


 S. Ackerman


 N. Adair


 A. Ahmed


 N. Ahmedli


 C. Aiken


 A. Albers


 K. Alfaro


 C. Alley


 C. Ames

 W. Andersen

 P. Andolina

 S. Andrew

 N. Angell

 W. Angelo

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



The TAT column header in descending sort:

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

**Workflow Manager Folder**      Folders   Settings   Reports   Logout

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

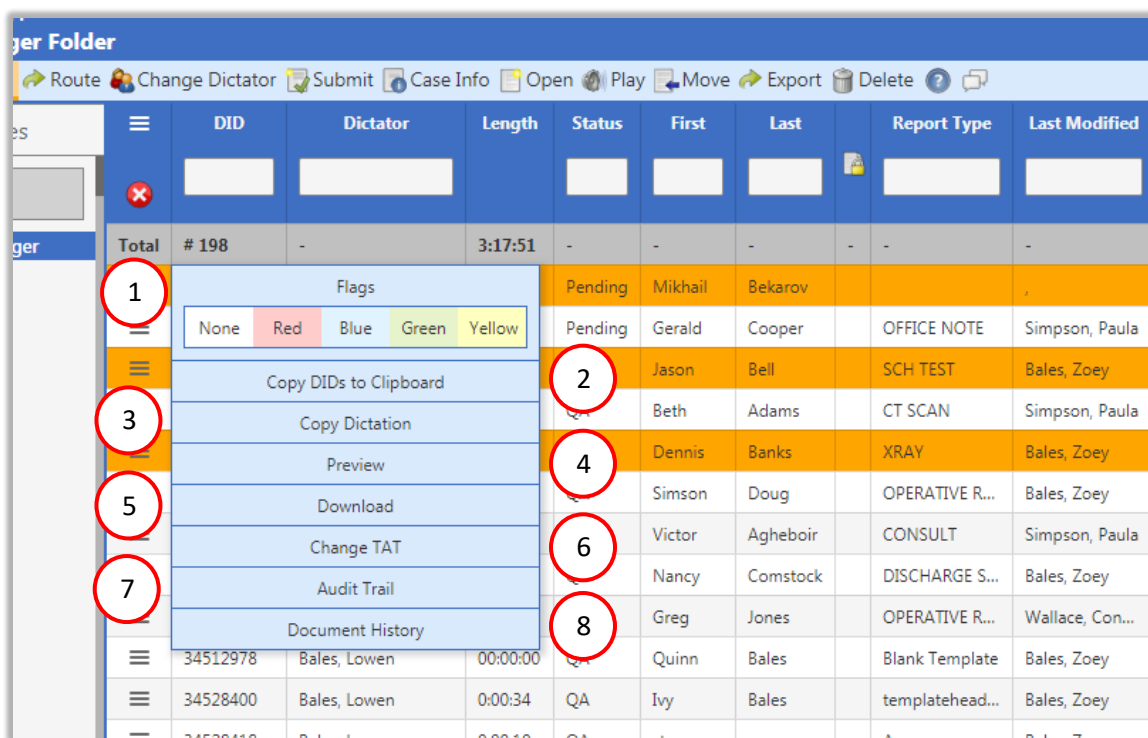
All Facilities	DID	Dictator	Length	Status	First	Last	TAT ▼	Report Type	Last Modif
filter...									
<b>Workflow Manager</b>	<b>Total</b>	<b># 92</b>	<b>1:36:35</b>						
My Documents	35081472	Bales, Lowen	0:00:08	Pending			Standard		,
All Documents	35072519	Bales, Lowen	0:00:36	QA	Ralph	Smith	Standard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

## File Display

The Workflow Manager File Display area can display files in any phase of the workflow (Pending, QA, Inbox, Rejected, Final, and Delivered (combines Inbox and Final)). For a detailed description of available file statuses and their meaning, see page 96.

## File Action Menu

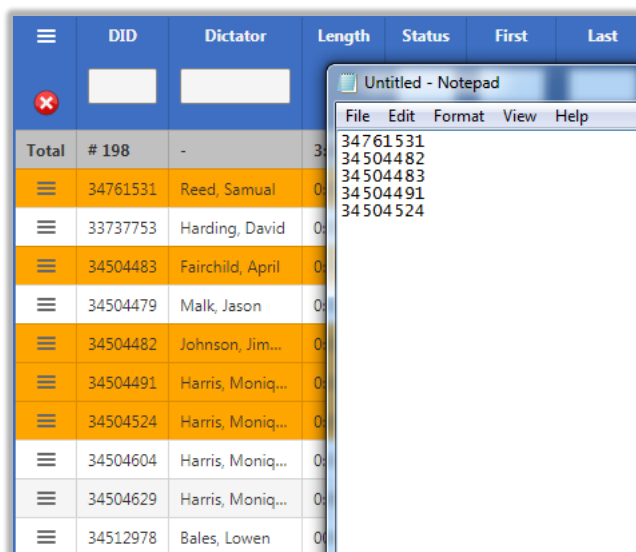
The first column of each row contains a small icon of three black lines. This is called the File Action Menu. Clicking the icon opens the File Action Menu. Actions that can be taken on a dictation or transcription appear in the menu. If multiple rows are selected, intentionally or by mistake, the action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

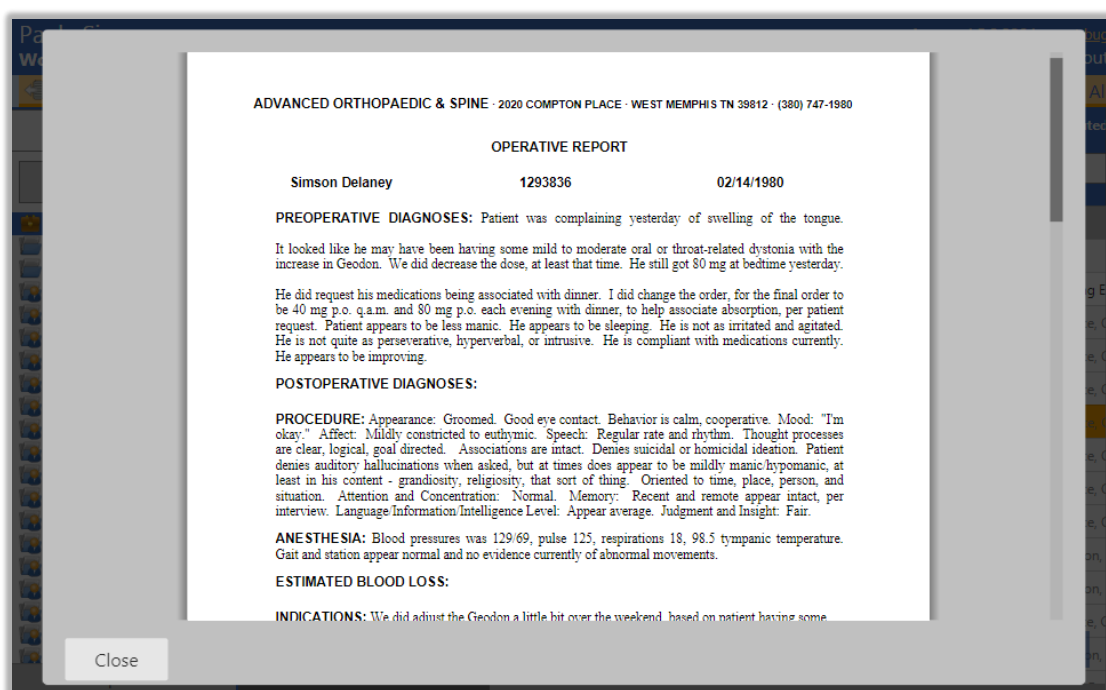
	DID	Dictator	Length	Status	First	Last	Report Type	Last Modified	Routed To	Comments	File Name
Total	# 198	-	3:17:51	-	-	-	-	-	-	-	-
	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov			Pool		sreed-030120...
	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	OFFICE NOTE	Simpson, Paula	Routing Error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

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



- 3 Copy Dictation: This feature makes a copy of the audio file selected. Copied audio files inherit the same routing rules as the master copy of the audio.

- 4 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.



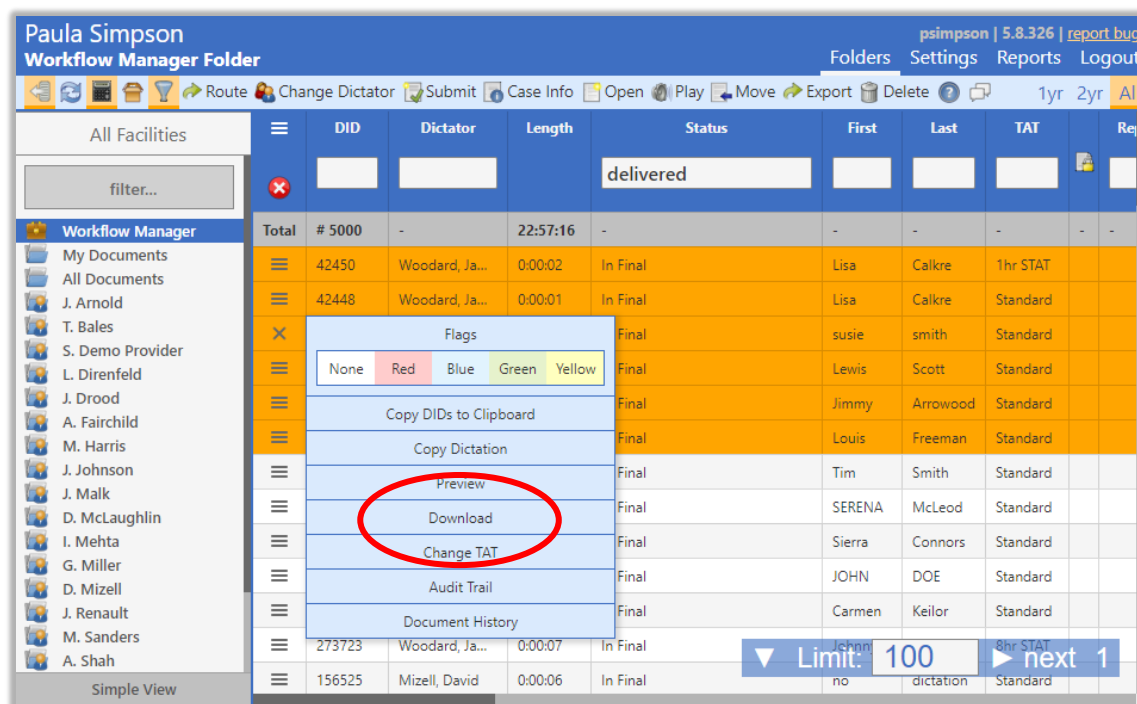
- 5 Download: This feature allows the user to download the transcribed document(s) to their computer as a .doc file. To download, the user clicks on the “Download” option on the Row Action Menu.

#### Setup:

The downloading process can be setup with these easy steps:

Step 1: Select file(s) to download

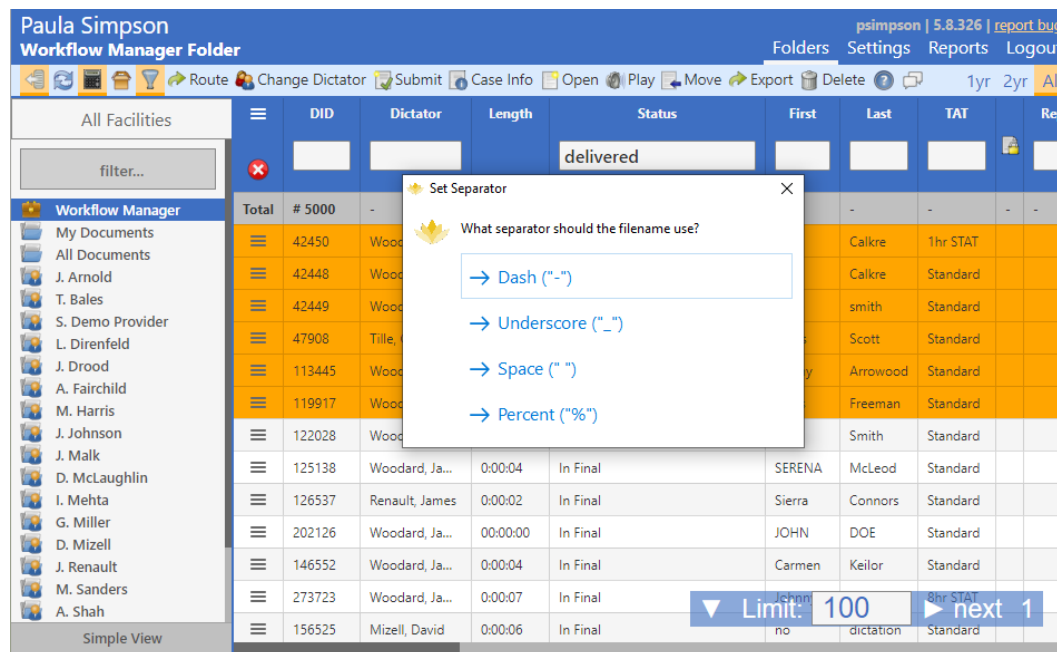
The user selects a single or multiple files and then clicks on the “Download” option of the “File Action Menu”. This initiates the downloading process.



## Step 2: Create the desired filename format

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

- Dash (“-“): This creates the file name using the dash between words.  
Example: Andrew-Smith-Jessica-Johnson.doc
- Underscore (“\_“): This creates the file name using the underscore between words.  
Example: Andrew\_Smith\_Jessica\_Johnson.doc
- Space (“ ““): This creates the file name using the underscore between words.  
Example: Andrew Smith Jessica Johnson.doc
- Percent (“%“): This creates the file name using the underscore between words.  
Example: Andrew%Smith%Jessica%Johnson.doc



### Step 3: Select the desired file name components.

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

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

Paula Simpson  
Workflow Manager Folder

psimpson | 5.8.326 | report bug

Folders Settings Reports Logout

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

All Facilities

filter...

Workflow Manager

My Documents

All Documents

J. Arnold

T. Bales

S. Demo Provider

L. Drenfeld

J. Drood

A. Fairchild

M. Harris

J. Johnson

J. Malk

D. McLaughlin

I. Mehta

G. Miller

D. Mizell

J. Renault

M. Sanders

A. Shah

A. Shah

C. Tille

P. Vesey

D. Wittenberg

J. Woodard

L. Yokochi

Select Fields

Select filename components from list

Filename:  
patient\_last patient\_first practitioner\_last  
dov dictationid

patient\_last patient\_first practitioner\_last dov dictationid

→ DID

→ Practice

→ DOV (MMDDYYYY)

→ DOV (MM-DD-YYYY)

→ Provider ID

→ Provider First

→ Provider Last

→ Patient First

→ Patient Last

→ MRN

→ DOB (MMDDYYYY)

→ DOB (MM-DD-YYYY)

→ Done

Simple View

Examples of typical filenames are:

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

32101595-Allentown Chiropractice-Johnson

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

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

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

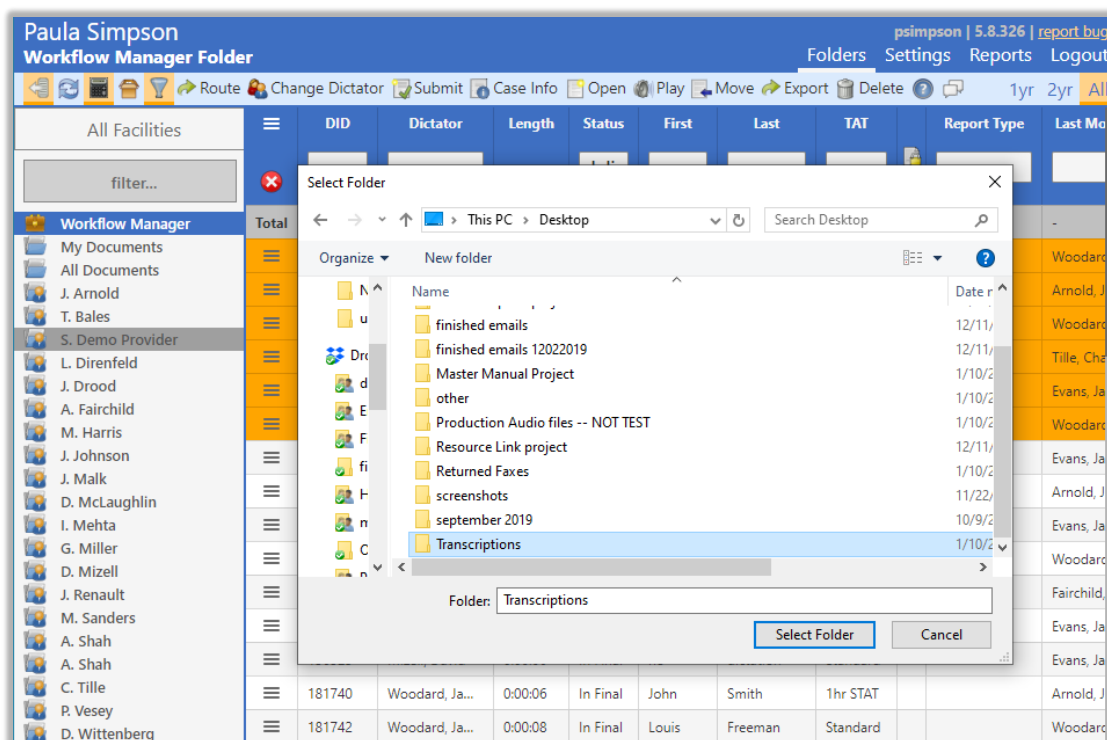
#### Step 4: Completing the filename

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

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

#### Step 5: Choose download location

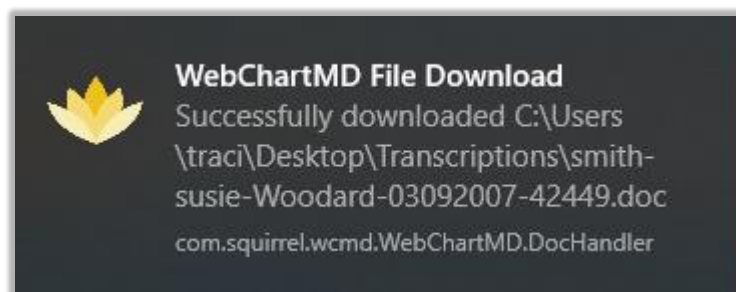
Once the filename has been established, the set-up tool displays a folder selection window. Browse to the folder or location desired for documents to download and press “Select Folder”.



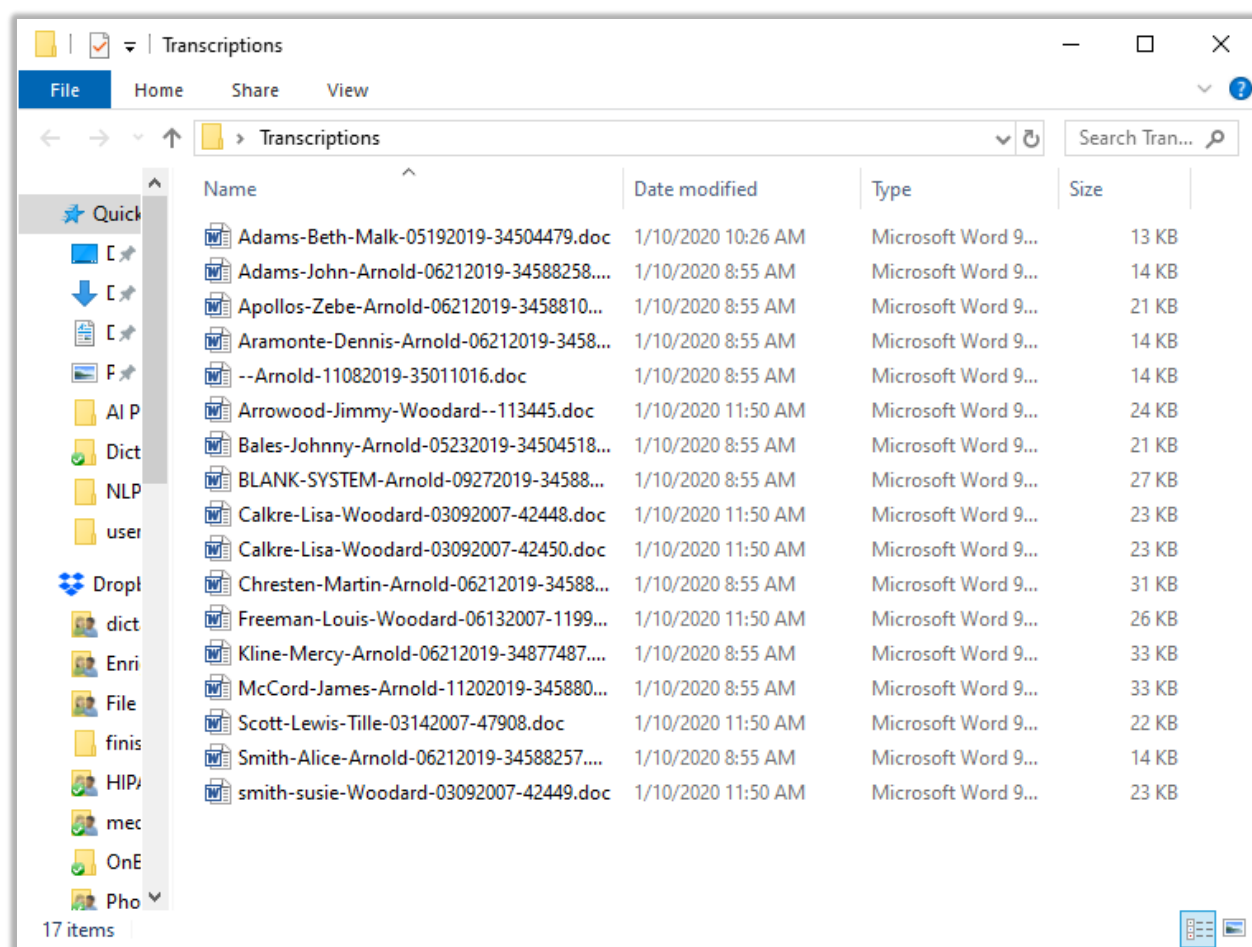
#### Step 6: Download completion



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



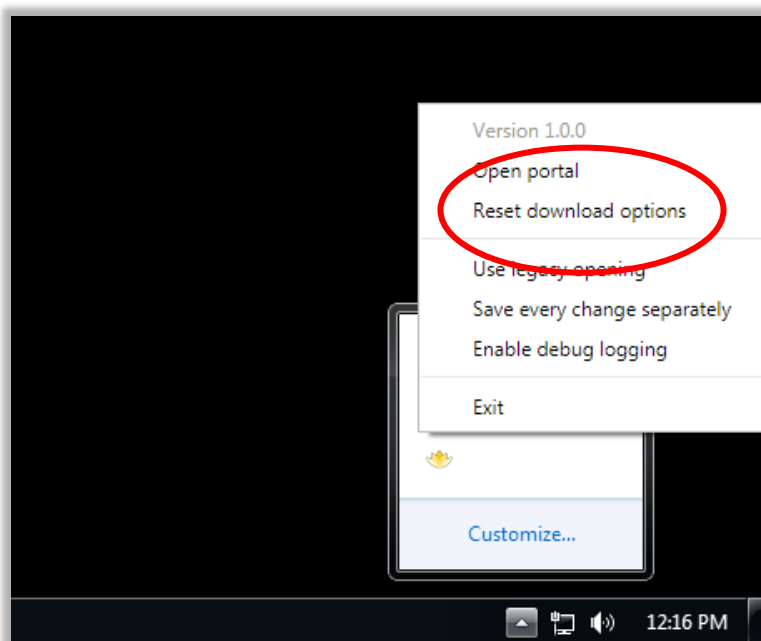
Download confirmation popup message



The transcribed documents downloaded to the selected location.

Notes:

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

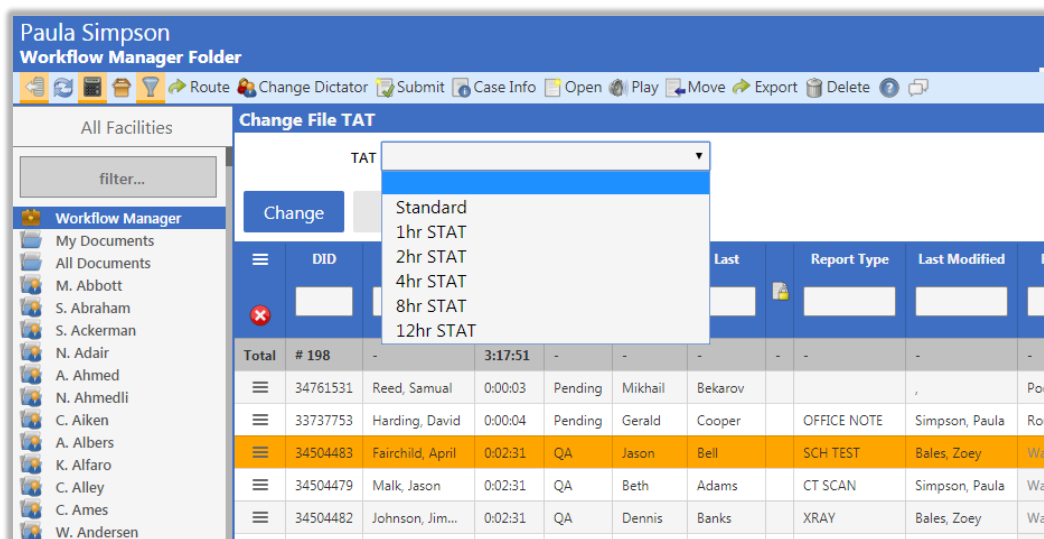


- 6 Change TAT: This feature also allows the user to change the turn-around time, or TAT, assigned to a dictation.

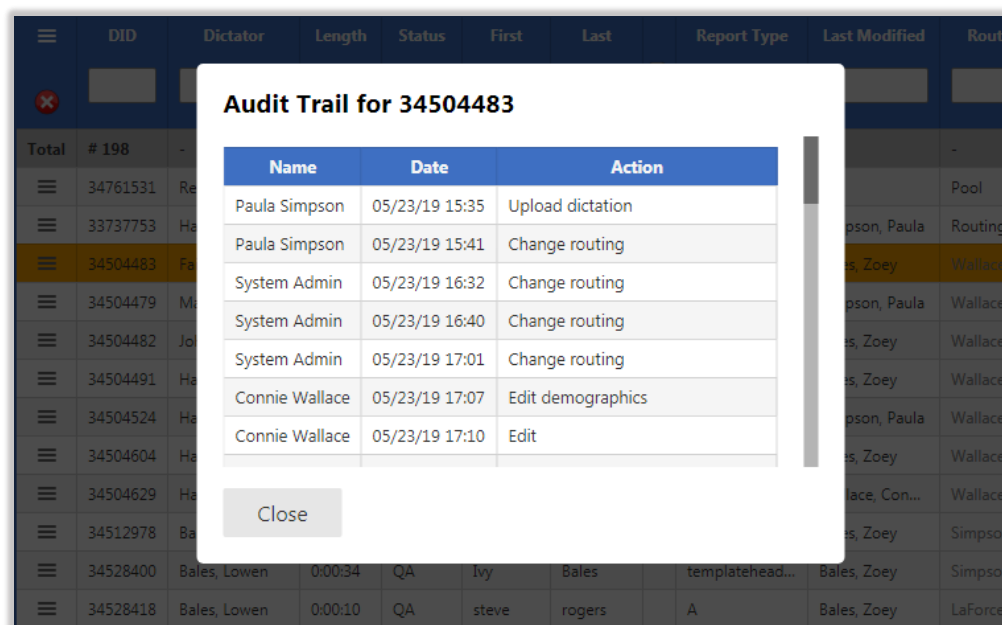
By default, dictations uploaded into the database receive a standard TAT.

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 (see page 167), “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”.












- 7 Audit Trail: This feature allows the user to view the audit trail associated with the dictation and transcription. Audit data captured includes the name of the user who accessed the document, the date and time of access, and the action performed during the access.



Document History: The document history displays all iterations of the document. Clicking the “open” icon to the left of any iteration opens the prior iteration of the document. Audit data captured for each iteration includes name of user who edited the iteration, patient MRN, patient name, edit date and time, and iteration tracking number. Clicking the “Restore” icon restores the document to the selected iteration.

	DID	Dictator	Length	Status	First	Last	Report Type	Last Modified	Routed To	Comments	File Name
Total	# 198										
	34761531										sreed-030120...
	33737753										com... davidharding...
	34504483										afarchild-052...
	34504479										newuser4-05...
	34504482										JimmyJohnso...
	34504491										moniqueharri...
	34504524										moniqueharri...
	34504604										moniqueharri...
	34504629										moniqueharri...
	34512978										lowenbales2-...
	34528400	Bales, Lowen	0:00:34	QA	Ivy	Bales	templatehead...	Bales, Zoey	Simpson, Paula		lowenbales2-...
	34528418	Bales, Lowen	0:00:10	QA	steve	rogers	A	Bales, Zoey	LaForce, Gloria		lowenbales2-...

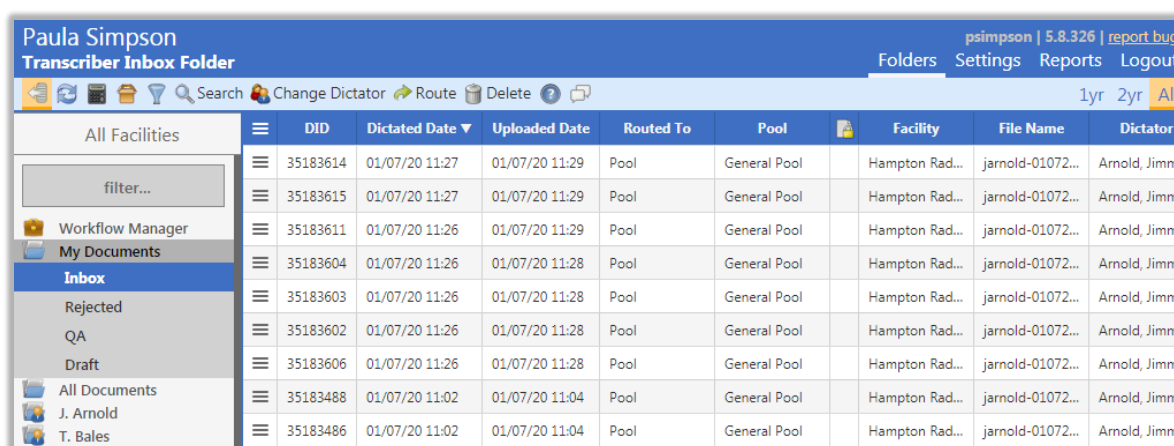
#### Document history for 34504483

Open	Edited By	Patient MRN	Patient First	Patient First	Edit Date	Iteration	Restore
	Bales, Zoey	36985	Jason	Bell	08/15/19 14:13	75954882	
	Bales, Zoey	36985	Jason	Bell	08/12/19 15:19	75934455	
	Evans, Janice	36985	Jason	Bell	08/02/19 08:25	75888799	
	Evans, Janice	36985	Jason	Bell	08/02/19 08:23	75888792	
	Evans, Janice	36985	Jason	Bell	07/30/19 14:34	75870628	
	Wallace, Connie	36985	Jason	Bell	05/23/19 17:10	75536968	

Close

## My Documents

The My Documents view of the folders is used by Transcription Team members who do not have permission to access the Workflow Manager. It also serves as a secondary view into the workflow for many of the same functions performed within the Workflow Manager. There are four folders with the My Documents view:



Paula Simpson Transcriber Inbox Folder									
psimpson   5.8.326   <a href="#">report bug</a>									
Folders Settings Reports Logout									
1yr 2yr All									
	DID	Dictated Date	Uploaded Date	Routed To	Pool	Facility	File Name	Dictator	
Workflow Manager	35183614	01/07/20 11:27	01/07/20 11:29	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
My Documents	35183615	01/07/20 11:27	01/07/20 11:29	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
Inbox	35183611	01/07/20 11:26	01/07/20 11:29	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
Rejected	35183604	01/07/20 11:26	01/07/20 11:28	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
QA	35183603	01/07/20 11:26	01/07/20 11:28	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
Draft	35183602	01/07/20 11:26	01/07/20 11:28	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
All Documents	35183606	01/07/20 11:26	01/07/20 11:28	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
J. Arnold	35183488	01/07/20 11:02	01/07/20 11:04	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	
T. Bales	35183486	01/07/20 11:02	01/07/20 11:04	Pool	General Pool	Hampton Rad...	jarnold-01072...	Arnold, Jimn	

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

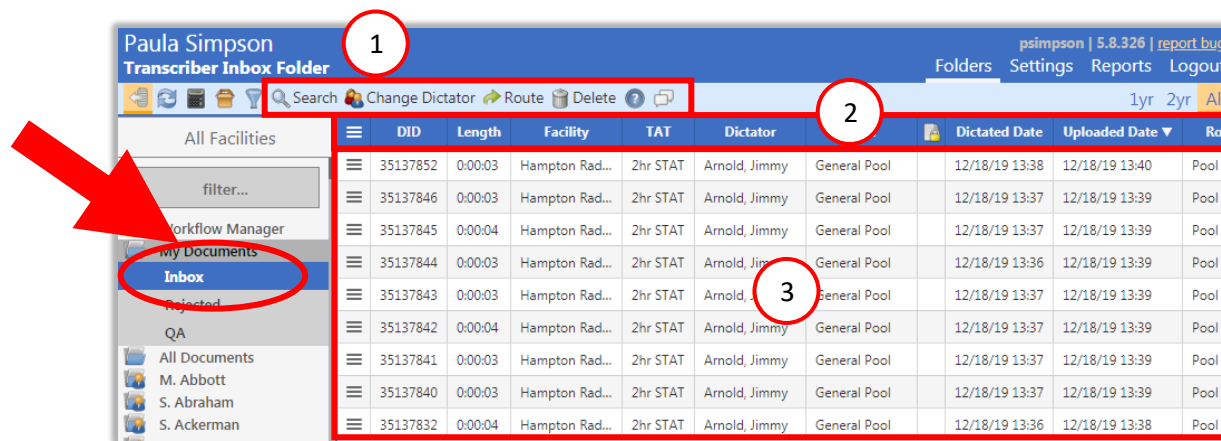
**QA:** This displays the transcriptions that need to be checked for Quality Assurance before being delivered to the Dictator.

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

**Draft:** This displays transcriptions that have been added to the workflow by the Dictator outside of the normal dictation and transcription process that need to be processed through Quality Assurance before delivery to the Dictator's Inbox. This could include handwritten documents uploaded as scans or PDFs; documents transcribed by the Dictator and/or Facility staff that need to be completed by the Transcription Team; and documents produced by the Dictator using front-end speech recognition.

## Inbox

The My Documents Inbox contains all dictations from all Facilities and all Dictators that are waiting to be transcribed by the Transcription Team.



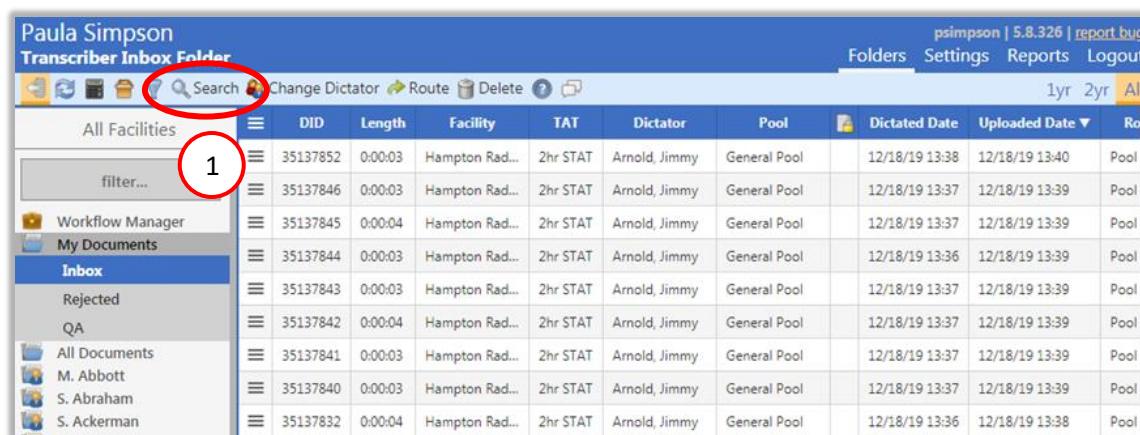
The screenshot displays the 'Paula Simpson Transcriber Inbox Folder' interface. The sidebar on the left shows the 'Inbox' folder selected. The top ribbon contains various management functions. The main area displays a table of dictation files with the following columns: DID, Length, Facility, TAT, Dictator, General Pool, Dictated Date, Uploaded Date, and Ro. The table lists several files, all from 'Hampton Rad...' and 'Arnold, Jimmy'.

DID	Length	Facility	TAT	Dictator	General Pool	Dictated Date	Uploaded Date	Ro
35137852	0:00:03	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:38	12/18/19 13:40	Pool
35137846	0:00:03	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:37	12/18/19 13:39	Pool
35137845	0:00:04	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:37	12/18/19 13:39	Pool
35137844	0:00:03	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:36	12/18/19 13:39	Pool
35137843	0:00:03	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:37	12/18/19 13:39	Pool
35137842	0:00:04	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:37	12/18/19 13:39	Pool
35137841	0:00:03	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:37	12/18/19 13:39	Pool
35137840	0:00:03	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:37	12/18/19 13:39	Pool
35137832	0:00:04	Hampton Rad...	2hr STAT	Arnold, Jimmy	General Pool	12/18/19 13:36	12/18/19 13:38	Pool

The Inbox folder consists of three important areas:

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

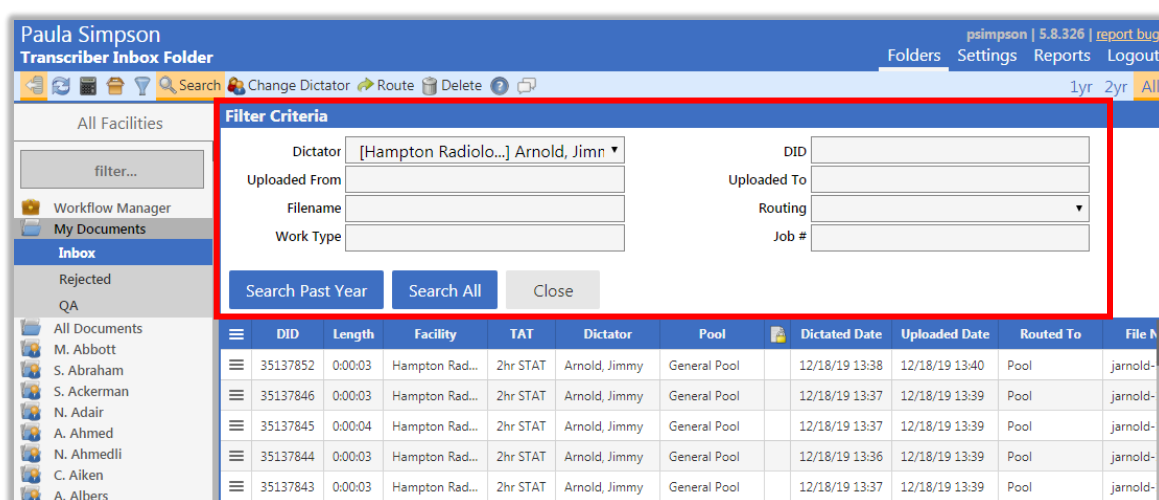
## Folder Management Functions



All available Folder Management Functions viewable in the My Documents Inbox and their descriptions can be found starting on page 19.

Functions unique to the My Documents Inbox are:

- 1 Search

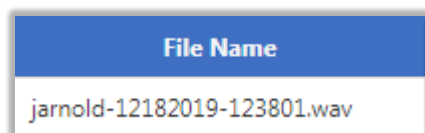


The Search function is found in almost every folder view and provides the user with the ability to quickly search for a dictation or transcription by using one or multiple search criteria.

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

Fields requiring explanation:

- The “Dictator” field displays all dictators that are serviced by the Transcription Team. Since the Inbox displays dictations for all facilities together, the search dictator field also allows the user to search for them.
- 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” – dictator’ 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 “Routing” field displays both the individual transcriptionists as well as pools so that the user can, for example, search for all dictations in a specific pool that are yet to get transcribed or see how many files a particular transcriptionist has in their queue.
- The “worktype” field is a custom text field that can be used with phone line dictations. Users can also search for all dictations using a specific worktype as needed.
- The “Job#” is a unique JobID that is provided to the dictator at the end of their dictation when calling into a phone line. The user can also search for a specific JobID as needed.

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.

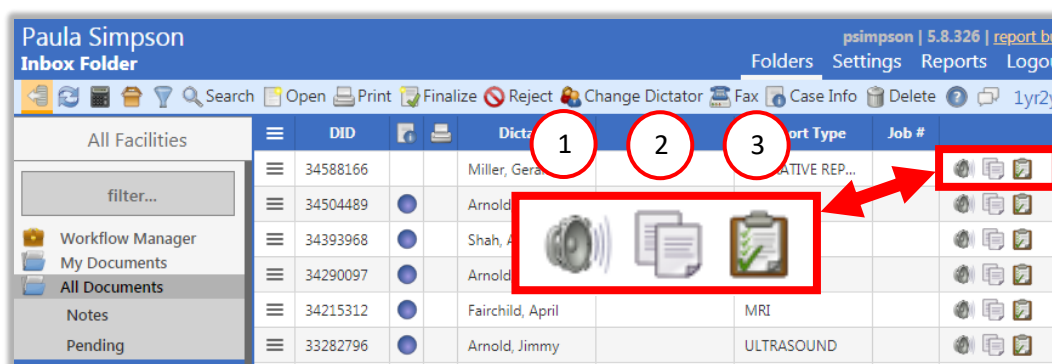


## Columns

All available columns viewable in the My Documents Inbox and their descriptions can be found starting on page 36.

Columns unique to the My Documents Inbox are:

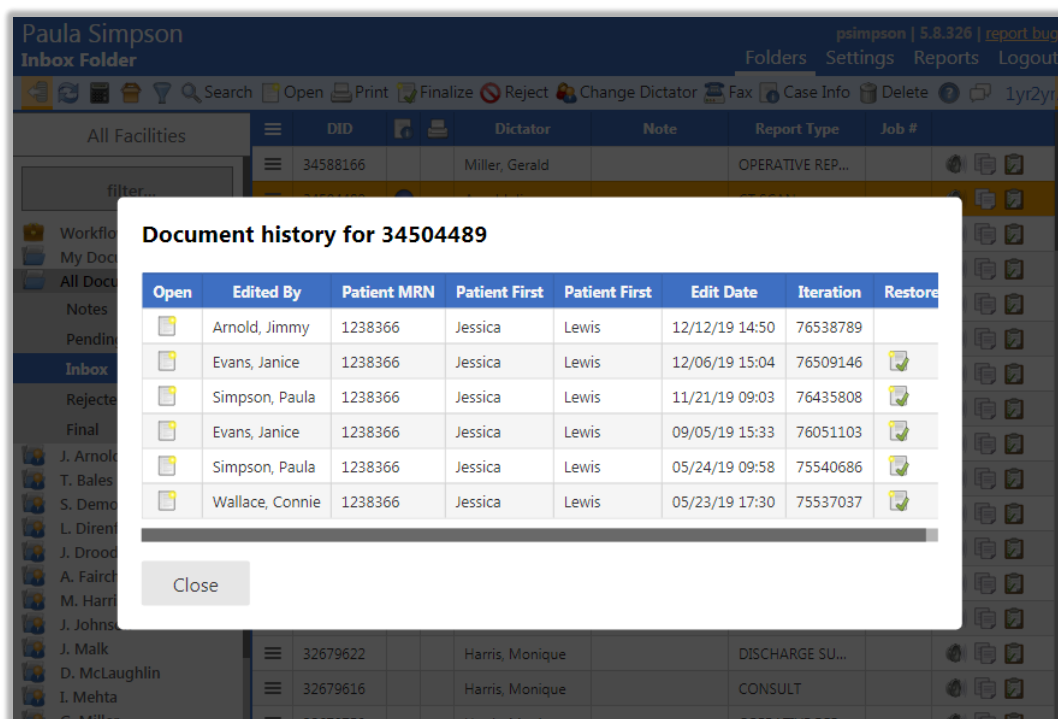
Actions: This column contains three icons:



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

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

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



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

### Column Management

See page 36 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 46.

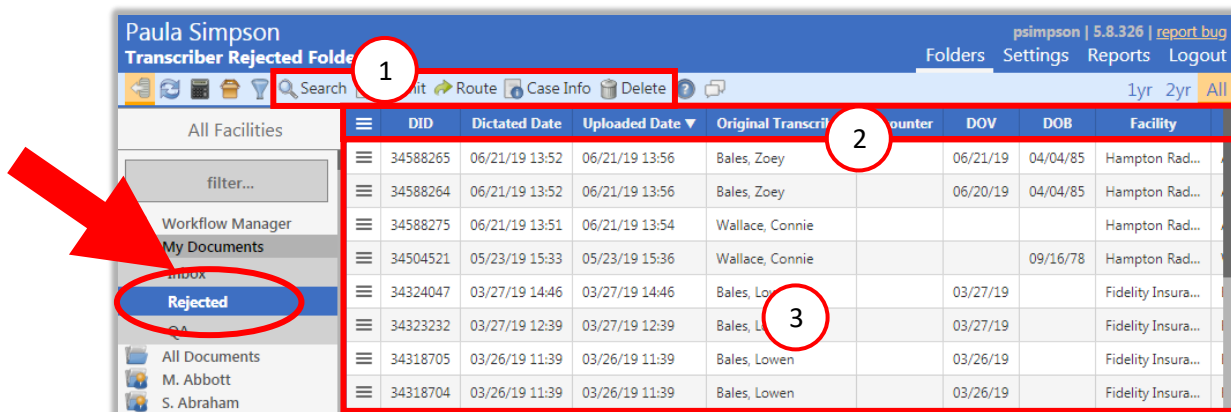
### File Action Menu

All available “File Action Menu” options viewable in the My Documents Inbox and their descriptions can be found starting on page 46.

## Rejected

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

These transcriptions show as routed to the last staff that it was routed to before being submitted to the dictator. To the Transcription Team staff, this folder looks just like the QA folder, with transcriptions waiting to be submitted to the dictator.



DID	Dictated Date	Uploaded Date	Original Transcription	Counter	DOV	DOB	Facility
34588265	06/21/19 13:52	06/21/19 13:56	Bales, Zoey		06/21/19	04/04/85	Hampton Rad...
34588264	06/21/19 13:52	06/21/19 13:56	Bales, Zoey		06/20/19	04/04/85	Hampton Rad...
34588275	06/21/19 13:51	06/21/19 13:54	Wallace, Connie				Hampton Rad...
34504521	05/23/19 15:33	05/23/19 15:36	Wallace, Connie			09/16/78	Hampton Rad...
34324047	03/27/19 14:46	03/27/19 14:46	Bales, Lowen		03/27/19		Fidelity Insura...
34323232	03/27/19 12:39	03/27/19 12:39	Bales, Lowen		03/27/19		Fidelity Insura...
34318705	03/26/19 11:39	03/26/19 11:39	Bales, Lowen		03/26/19		Fidelity Insura...
34318704	03/26/19 11:39	03/26/19 11:39	Bales, Lowen		03/26/19		Fidelity Insura...

The Rejected folder consists of three important areas:

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

### Folder Management Functions

All available Folder Management Functions viewable in the My Documents Rejected and their descriptions can be found starting on page 19.

### Columns

All available columns viewable in the My Documents Rejected and their descriptions can be found starting on page 36.

Columns unique to the My Documents Rejected are:

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

#### *Column Management*

See page 36 for a full description of column management features.

### **File Display**

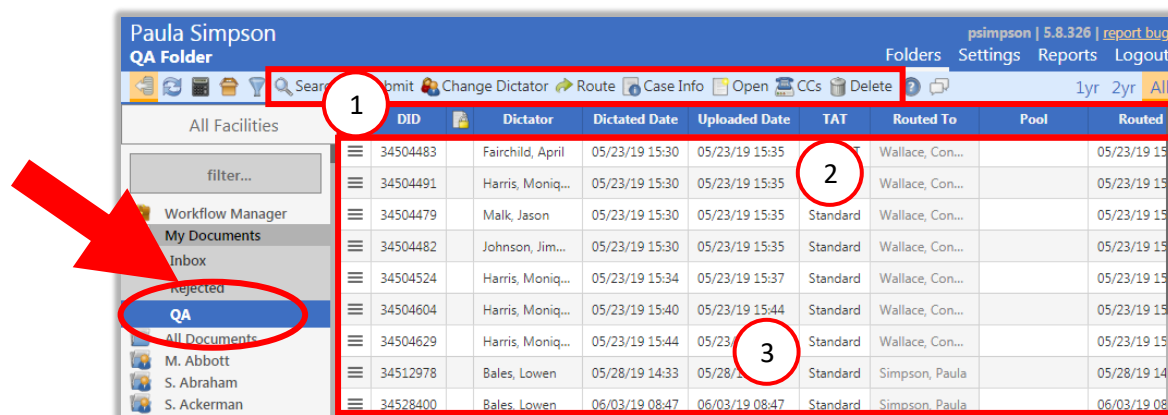
This section displays transcriptions that have been rejected by the Dictator. All visible transcriptions in this folder are of the Rejected status. For a detailed description of available file statuses and their meaning, see page 46.

#### *File Action Menu*

All available “File Action Menu” options viewable in the My Documents Rejected and their descriptions can be found starting on page 46.

## QA

The QA folder contains dictations that have been just transcribed and uploaded by the Transcriptionist for the Transcription Team to check for quality control measures before sending it to the dictator. The edits done within the QA folder do not change line counts for the Transcriptionist that uploaded the transcribed document.



The QA folder consists of three important areas:

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

### Folder Management Functions

Paula Simpson  
QA Folder

psimpson | 5.8.326 | [report bug](#)

Folders Settings Reports Logout

Search Submit Change Dictator Route Case Info Open CCs Delete 1yr 2yr All

DID	Dictator	Dictated Date	Uploaded Date	TAT	Routed To	Pool	Routed
34504483	Fairchild, April	05/23/19 15:30	05/23/19 15:30	STAT	Wallace, Con...		05/23/19 15:30
34504491	Harris, Moniq...	05/23/19 15:30	05/23/19 15:30	Standard	Wallace, Con...		05/23/19 15:30
34504479	Malk, Jason	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con...		05/23/19 15:35
34504482	Johnson, Jim...	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con...		05/23/19 15:35
34504524	Harris, Moniq...	05/23/19 15:34	05/23/19 15:37	Standard	Wallace, Con...		05/23/19 15:37
34504604	Harris, Moniq...	05/23/19 15:40	05/23/19 15:44	Standard	Wallace, Con...		05/23/19 15:44
34504629	Harris, Moniq...	05/23/19 15:44	05/23/19 15:47	Standard	Wallace, Con...		05/23/19 15:47

All Facilities

filter...

Workflow Manager

My Documents

Inbox

Rejected

QA

All Documents

All available Folder Management Functions viewable in the My Documents QA and their descriptions can be found starting on page 19.

# 1 CCs Management:

Paula Simpson  
QA Folder

psimpson | 5.8.326 | [report bug](#)

Folders Settings Reports Logout

Search Submit Change Dictator Route Case Info Open CCs Delete 1yr 2yr All

DID	Dictator	Dictated Date	Uploaded Date	TAT	Routed To	Pool
34393987	Shah, Ashish	04/18/19 15:12	04/18/19 15:15	1hr STAT	Simpson, Paula	

**Manage CC's for 34504479**

Address Book Name	Address Book Fax	Contact Name	Contact Fax	Remove CC
ABADEER, PETER S DO	(309) 661-3394	Joe Smith, MD	(123) 456-8520	
John S Cullen, MD	(907) 835-5162	James Smith	(907) 835-5162	
John S Cullen, MD	(907) 835-5162	James Smith	(907) 835-5162	

**Add CC**

1

Close

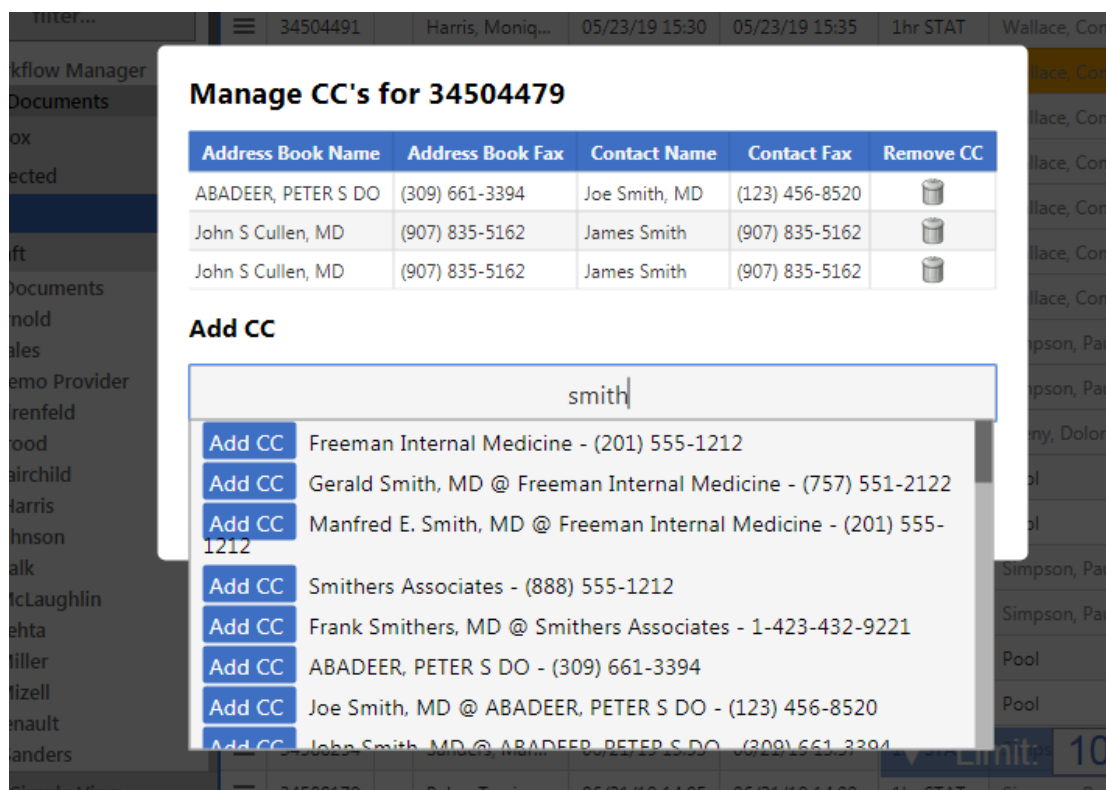
2

3




1

Limit: 100

- 1 Selecting a File and clicking the “CCs” function button will create a popup that allows editing of CC recipients . For example, typing “Smith” displays a list of all users in the Address Book for the user to select. The list has a scroll



**Manage CC's for 34504479**

Address Book Name	Address Book Fax	Contact Name	Contact Fax	Remove CC
ABADEER, PETER S DO	(309) 661-3394	Joe Smith, MD	(123) 456-8520	
John S Cullen, MD	(907) 835-5162	James Smith	(907) 835-5162	
John S Cullen, MD	(907) 835-5162	James Smith	(907) 835-5162	

**Add CC**

smith

- Add CC Freeman Internal Medicine - (201) 555-1212
- Add CC Gerald Smith, MD @ Freeman Internal Medicine - (757) 551-2122
- Add CC Manfred E. Smith, MD @ Freeman Internal Medicine - (201) 555-1212
- Add CC Smithers Associates - (888) 555-1212
- Add CC Frank Smithers, MD @ Smithers Associates - 1-423-432-9221
- Add CC ABADEER, PETER S DO - (309) 661-3394
- Add CC Joe Smith, MD @ ABADEER, PETER S DO - (123) 456-8520
- Add CC John Smith, MD @ ABADEER, PETER S DO - (309) 661-3394

- 2 New CC recipients are added by entering the full or partial first or last name into the “Add CC” field and clicking on the desired search result to select it. Selected items appear in table at the top of the box.
- 3 Deleting CC recipients is done by clicking the trash can icon to the right of the recipient to be deleted in the “Remove CC” column.

Clicking the Close button closes the Manage CC window.

## Columns

All available columns viewable in the My Documents QA and their descriptions can be found starting on page 36.

Columns unique to the My Documents Inbox are:

**Routed:** This column displays the time and date when the dictation was routed to the user.

### Column Management

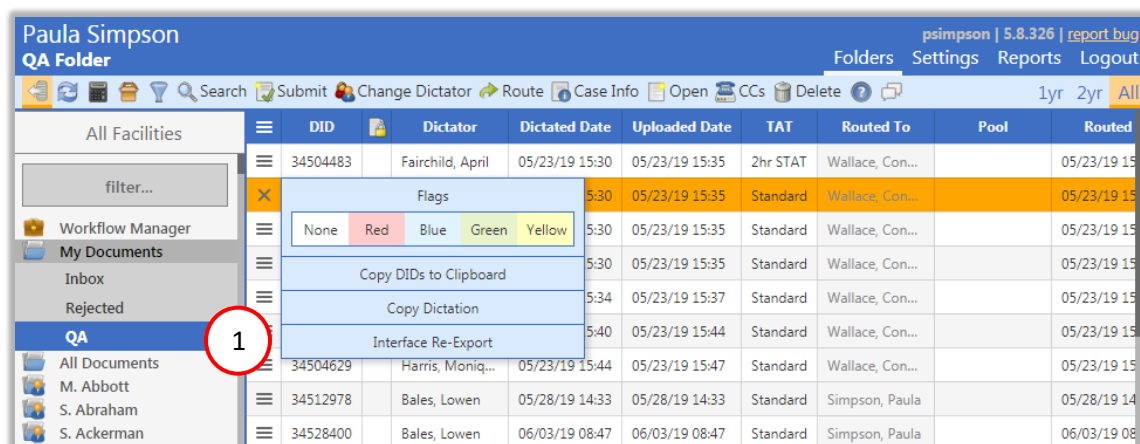
See page 36 for a full description of column management features.

## File Display

This section displays the transcriptions that are yet to be delivered to the Dictator. All visible dictations in this folder are of the QA status. For a detailed description of available file statuses and their meaning, see page 46.

### File Action Menu

All available “File Action Menu” options viewable in the My Documents QA and their descriptions can be found starting on page 46.



Paula Simpson QA Folder									
psimpson   5.8.326   <a href="#">report bug</a>									
Folders Settings Reports Logout									
1yr 2yr All									
	DID	Dictator	Dictated Date	Uploaded Date	TAT	Routed To	Pool	Routed	
	34504483	Fairchild, April	05/23/19 15:30	05/23/19 15:35	2hr STAT	Wallace, Con...		05/23/19 15:35	
		Flags	5:30	05/23/19 15:35	Standard	Wallace, Con...		05/23/19 15:35	
		None Red Blue Green Yellow	5:30	05/23/19 15:35	Standard	Wallace, Con...		05/23/19 15:35	
		Copy DIDs to Clipboard	5:30	05/23/19 15:35	Standard	Wallace, Con...		05/23/19 15:35	
		Copy Dictation	5:34	05/23/19 15:37	Standard	Wallace, Con...		05/23/19 15:37	
		Interface Re-Export	5:40	05/23/19 15:44	Standard	Wallace, Con...		05/23/19 15:44	
	34504629	Harris, Moniq...	05/23/19 15:44	05/23/19 15:47	Standard	Wallace, Con...		05/23/19 15:47	
	34512978	Bales, Lowen	05/28/19 14:33	05/28/19 14:33	Standard	Simpson, Paula		05/28/19 14:33	
	34528400	Bales, Lowen	06/03/19 08:47	06/03/19 08:47	Standard	Simpson, Paula		06/03/19 08:47	

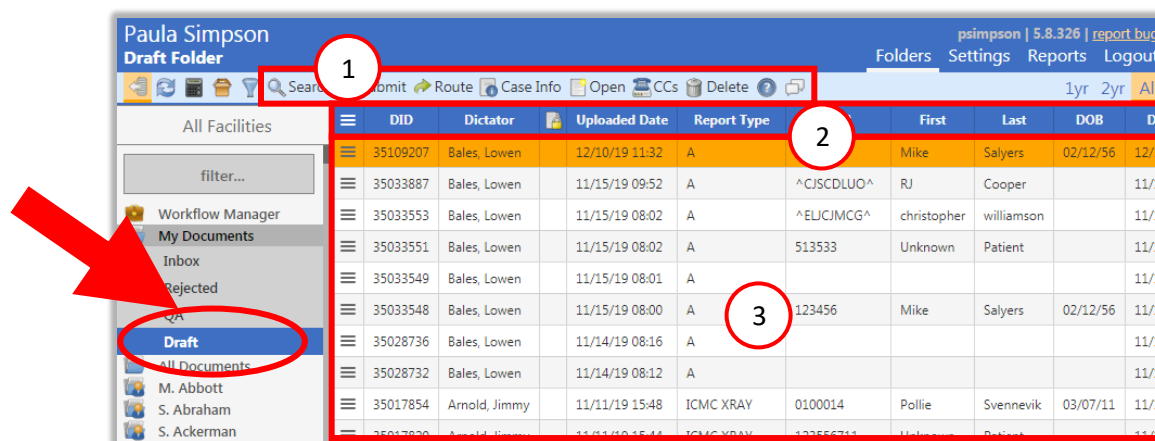
- 1 Interface Re-Export: This feature allows the user to retrigger a transcription so that it exports. For more details, please contact WebChartMD Support for details on setting up an Interface.



## Draft

The Draft folder holds transcriptions that the Dictator types themselves, either manually or by using any front end voice processing software such as Dragon Dictate. These transcriptions are then available to the Transcription Team for review / QA before delivery to the Dictator' inbox.

Note: for more detailed instructions on the use of front-end speech recognition with WebChartMD, see page 94.



The Draft folder consists of three important areas:

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

## Folder Management Functions

All available Folder Management Functions viewable in the My Documents Draft and their descriptions can be found starting on page 19.

Functions unique to the My Documents Inbox (for the Dictators only) are:

New Document: This feature allows the Dictator to create a new transcription. More details on this are available on page 94.

## Columns

All available columns viewable in the My Documents Draft and their descriptions can be found starting on page 36.

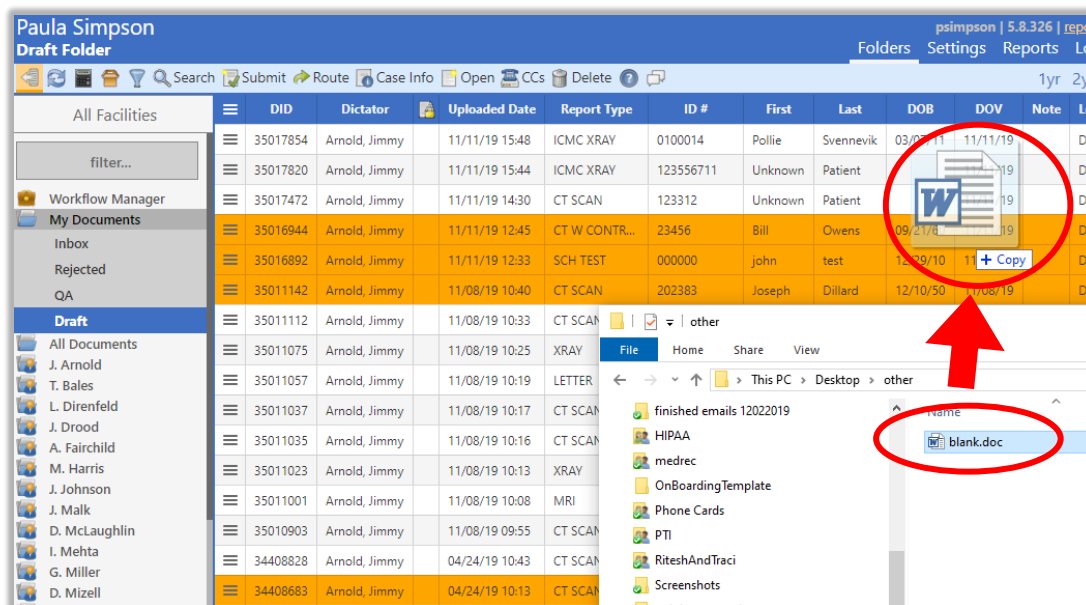
### Column Management

See page 36 for a full description of column management features.

## File Display

The Draft folder displays transcriptions that can be reviewed by the Transcription Team before delivering to the Dictator's Inbox. For a detailed description of available file statuses and their meaning, see page 46.

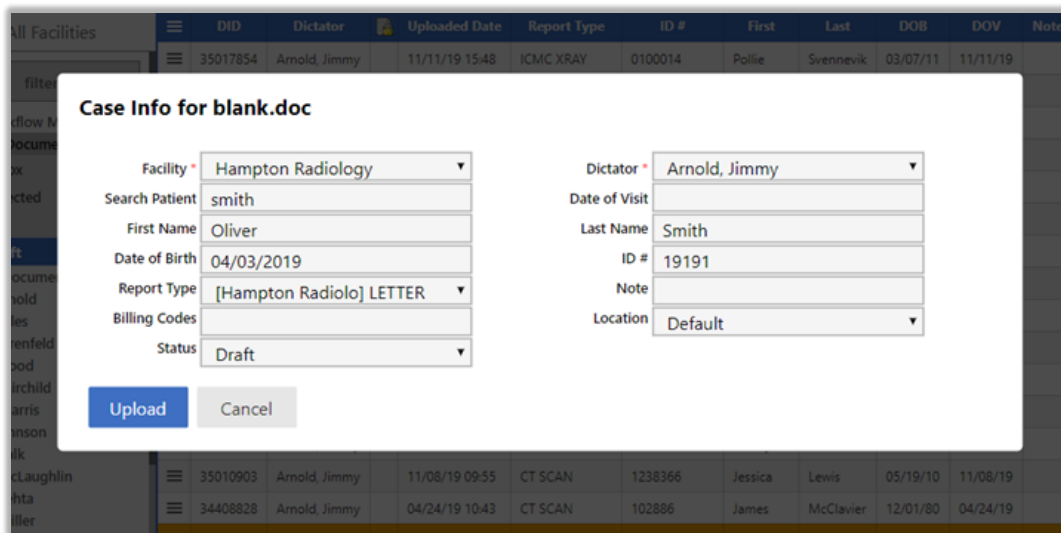
Creating a new Draft document is different than how dictations are created by Dictators. To create a new draft the user will select a document from their local computer, then drag the document to the main "Draft" window. The user will then drop the file and the document will automatically upload.



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

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

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



**Search Patient:** Users can search existing patient records by using the “Search Patient” field. To Search for a patient, begin entering the patient’s name and the portal will automatically search for matching patient names. Once a list is found the user will be presented with a dropdown to select from.

Once the patient is selected any available demographic information for that patient will populate the “Case Info” window.

Note: If a patient record does not already exist in WebChartMD’s system, the user can manually add demographic information to the “Case Info” screen.

**Date of Visit:** The user will enter the date of visit for the specific document they are uploading

**First Name:** The first name of the patient will be entered in this field, if the patient was selected from the “Search Patient” field this demographic will populate automatically, if the user was unable to find or needs to add a new patient this field will be filled out manually.

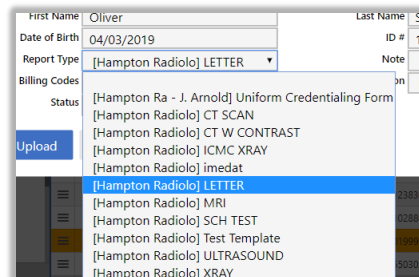
**Last Name:** The last name of the patient will be entered in this field, if the patient was selected from the “Search Patient” field this demographic will populate automatically, if the user was unable to find or needs to add a new patient this field will be filled out manually.

**Date of Birth:** The date of birth of the patient will be entered in this field, if the patient was selected from the “Search Patient” field this demographic will populate automatically (if available), if the user was unable to find or needs to add a new patient this field will be filled out manually.

**ID #:** The ID# of the patient will be entered in this field, if the patient was selected from the “Search Patient” field this demographic will populate automatically (if available), if the user was unable to find or needs to add a new patient this field will be filled out manually or left blank (if left blank the system will assign a unique ID#).

**Report Type:** The user will select which template the new document will be uploaded under. The user will be presented with a dropdown of the available template types:

**Note:** (optional) The user has the option of adding a note to the document they are uploading

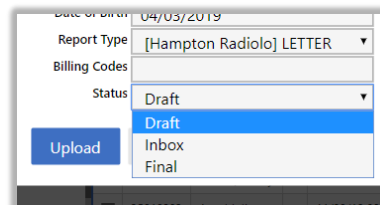


**Billing Codes:** (optional) The user has the option of adding any billing codes needed to the document they are uploading

**Location:** Multi-location facilities have the option of selecting different facilities, by using the “Location” dropdown field. The user will click the dropdown field and available locations will be presented for the user to select.

**Status:** The status field set the location of the document after it is uploaded. Users have three options to select from:

- **Draft:** This sends the uploaded document to the draft folder where it can be reviewed and submitted to the provider’s inbox
- **Inbox:** This option sends the document straight to the provider’s inbox bypassing any editing from the transcription side.
- **Final:** This option sends the document straight to the provider’s final folder, bypassing the transcription side and the inbox.



Clicking on the “Upload” button saves the uploaded document along with the demographics provided in the Case Info window. Clicking on the “Cancel” button closes the Case Info window and the uploaded document is discarded by the Portal.

Once Uploaded the document will be displayed in the appropriate folder.

Paula Simpson  
Draft Folder

psimpson | 5.8.326 | report bug

Folders Settings Reports Logout

1yr 2yr All

	DID	Dictator	Uploaded Date	Report Type	ID #	First	Last	DOB	DOV	Note	Location
	35219474	Arnold, Jimmy	01/17/20 10:23	LETTER	19191	Oliver	Smith	04/03/19	01/17/20		Default
	35017854	Arnold, Jimmy	11/11/19 15:48	ICMC XRAY	0100014	Pollie	Svennevik	03/07/11	11/11/19		Default
	35017820	Arnold, Jimmy	11/11/19 15:44	ICMC XRAY	123556711	Unknown	Patient		11/11/19		Default
	35017472	Arnold, Jimmy	11/11/19 14:30	CT SCAN	123312	Unknown	Patient		11/11/19		Default
	35016944	Arnold, Jimmy	11/11/19 12:45	CT W CONTR...	23456	Bill	Owens	09/21/60	11/11/19		Default
	35016892	Arnold, Jimmy	11/11/19 12:33	SCH TEST	000000	john	test	12/29/10	11/11/19		Default
	35011142	Arnold, Jimmy	11/08/19 10:40	CT SCAN	202383	Joseph	Dillard	12/10/50	11/08/19		Default
	35011112	Arnold, Jimmy	11/08/19 10:33	CT SCAN	^KUZFNF5Q^	Ralph	Smith		11/08/19		Default
	35011075	Arnold, Jimmy	11/08/19 10:25	XRAY	192872	John	Daily		11/08/19		Default

## Creating Documents Without Audio Files

Dictators can create documents directly from templates in WebChartMD without the need for an accompanying audio file. Instructions are included in the Facility user manuals but included here as a resource for the Transcription Team.

To create a document directly from the template, the Dictator follows these steps:

1. Click the “New Document” button on the Folder Management toolbar in the “Draft” folder.

Lowen Bales  
Draft Folder

lowenbales2 | 5.8.326 | report bug

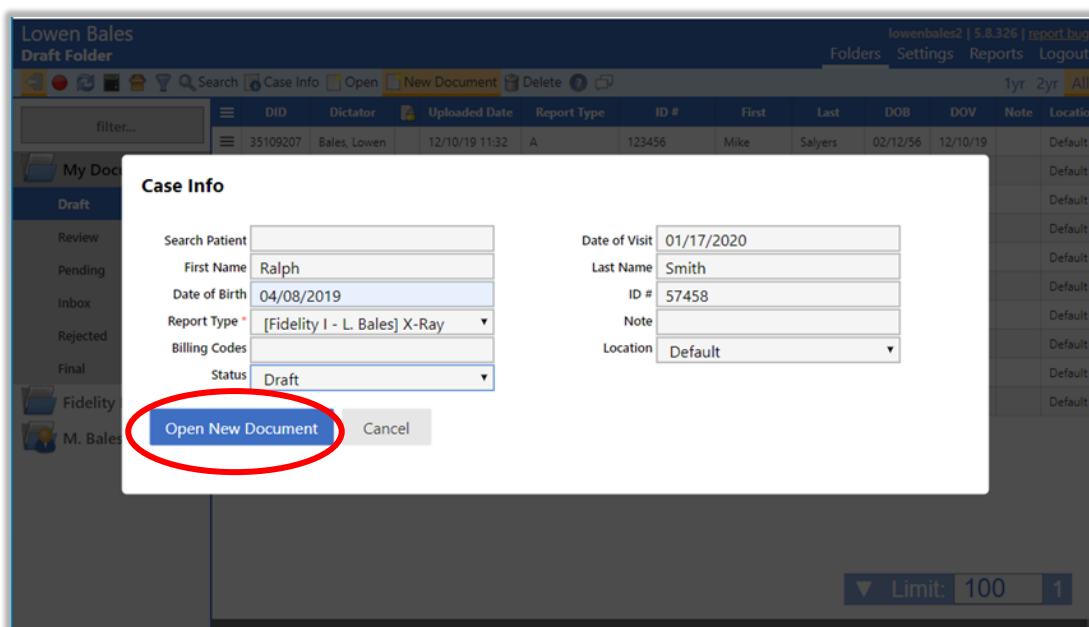
Folders Settings Reports Logout

1yr 2yr All

	DID	Dictator	Uploaded Date	Report Type	ID #	First	Last	DOB	DOV	Note	Location
	35109207	Bales, Lowen	12/10/19 11:32	A	123456	Mike	Salyers	02/12/56	12/10/19		Default
	35033887	Bales, Lowen	11/15/19 09:52	A	^CJSCDLUO^	RJ	Cooper		11/15/19		Default
	35033553	Bales, Lowen	11/15/19 08:02	A	^ELICJIMCG^	christopher	williamson		11/15/19		Default
	35033551	Bales, Lowen	11/15/19 08:02	A	513533	Unknown	Patient		11/15/19		Default
	35033549	Bales, Lowen	11/15/19 08:01	A					11/15/19		Default
	35033548	Bales, Lowen	11/15/19 08:00	A	123456	Mike	Salyers	02/12/56	11/15/19		Default
	35028736	Bales, Lowen	11/14/19 08:16	A					11/14/19		Default

2. Click the “Case Info” window to enter demographics and make other selections relevant to the dictation.
  - a. Add patient information if desired (not required).
  - b. Search for the patient using the “Search Patient” field. Previously transcribed patients will present in the search box.
  - c. Select the “Report Type” (required entry) to use in conjunction with the workflow.
  - d. Select the “Status” for the file (required). If “Draft” is selected, the completed document will route to the Transcription Team for review and clean-up. If “Inbox” is selected, the document will by-pass QA and move directly to the Dictator’s Inbox.

- e. After filling out the information in the fields, click the “Open New Document” button in the Case Info box (below).
3. Click the “Open New Document” button at the bottom of the Case Info box.



Lowen Bales Draft Folder

lowenbales2 | 5.8.326 | report bug

Folders Settings Reports Logout

Search Case Info Open New Document Delete

filter...

My Documents

Draft

Review

Pending

Inbox

Rejected

Final

Fidelity

M. Bales

Case Info

Search Patient

First Name Ralph

Date of Birth 04/08/2019

Report Type [Fidelity I - L. Bales] X-Ray

Billing Codes

Status Draft

Date of Visit 01/17/2020

Last Name Smith

ID # 57458

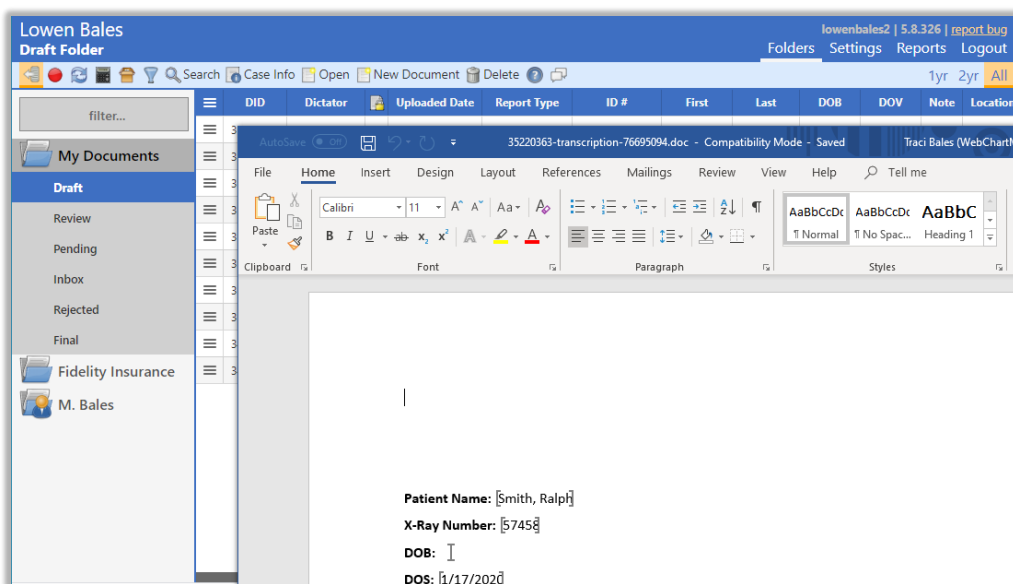
Note

Location Default

Open New Document Cancel

Limit: 100 1

4. The selected template opens, and the case information populates into the template (below).



Lowen Bales Draft Folder

lowenbales2 | 5.8.326 | report bug

Folders Settings Reports Logout

Search Case Info Open New Document Delete

filter...

My Documents

Draft

Review

Pending

Inbox

Rejected

Final

Fidelity Insurance

M. Bales

AutoSave 35220363-transcription-76695094.doc - Compatibility Mode - Saved

Traci Bales (WebChartMD)

File Home Insert Design Layout References Mailings Review View Help Tell me

Calibri 11 A\* Aa

B I U X<sub>2</sub> X<sup>2</sup> A - A -

Font Paragraph Styles

AaBbCcDc AaBbCcDc AaBbCc

Normal No Spac... Heading 1

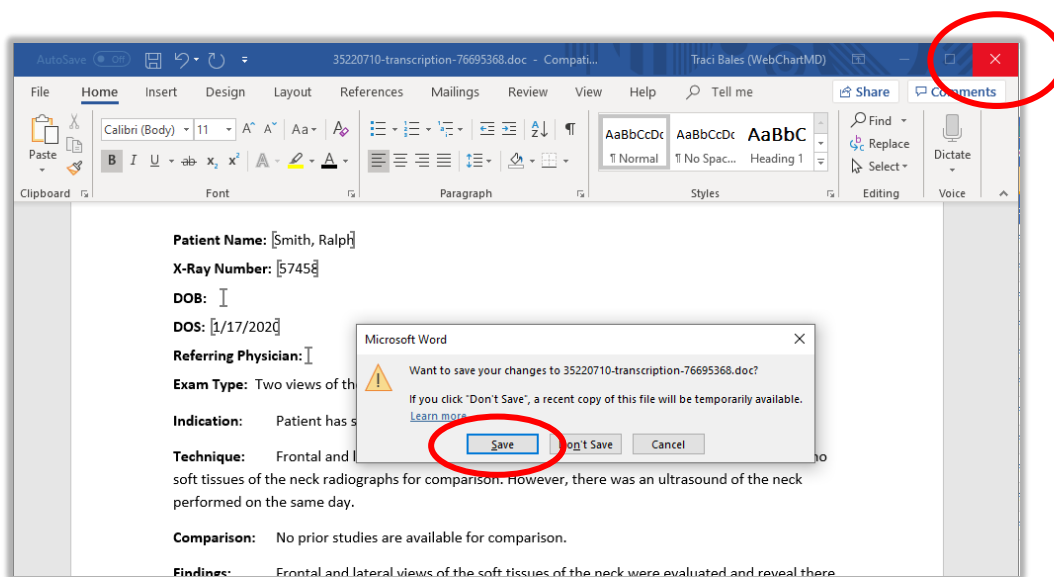
Patient Name: [Smith, Ralph]

X-Ray Number: [57458]

DOB: [04/08/2019]

DOS: [01/17/2020]

5. Once the document is opened, the Dictator manually types content into the template.
6. Once completed, the Dictator saves and closes the document (below). The document will follow the routing rules selected in the “Status” dropdown as mentioned in 2.d above.



### File Action Menu

All available “File Action Menu” options viewable in the My Documents Draft and their descriptions can be found starting on page 46.

## All Documents

The “All Documents” folder gives the user a view of the dictations and transcriptions from the perspective of a user at the Facility. The “All Documents” folder contains five subfolders: Notes, Pending, Inbox, Rejected, and Final.

Paula Simpson  
Notes Folder

psimpson | 5.8.326 | report bug

Folders Settings Reports Logout

1yr 2yr All

Facility	Dictator	Note Type	Effective Date	Comments	Uploaded Date
Fidelity Insurance	Bales, Lowen	Info Document	12/27/19	Updated Note 1...	12/27/19 13:43
Hampton Radiol...	Bales, Traci	Info Document	12/13/19	Test Document	12/13/19 15:06
Fidelity Insurance	Bales, Lowen	Patient List	03/26/19		10/31/19 08:30
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, Jimmy	am patients	07/10/19		07/10/19 15:36
Hampton Radiol...	Arnold, Jimmy	Patient List	05/28/19	AM Patients	05/28/19 19:04
Hampton Radiol...	Arnold, Jimmy	Patient List	05/14/19	AM patients only!	05/14/19 11:40
Hampton Radiol...	Fairchild, April	New Letterhead	04/11/19	we added Dr. Z t...	04/11/19 10:10
Hampton Radiol...	Bales, Traci	Patient List	04/11/19	AM patients only!	04/11/19 10:09
Hampton Radiol...	Arnold, Jimmy		04/08/19	for Monday's aw...	04/08/19 17:04
Hampton Radiol...	Malk, Jason	Hand-written N...	04/11/19		04/08/19 17:00
Hampton Radiol...	Bales, Traci		04/08/19	letter to office st...	04/08/19 16:59

filter...

Workflow Manager

My Documents

All Documents

Notes

Pending

Inbox

Rejected

Final

M. Abbott

S. Abraham

S. Ackerman

N. Adair

A. Ahmed

N. Ahmedli

C. Aiken

A. Albers

Notes: This contains notes such as patient list or other information for the Transcription Team.

Pending: This contains the dictations waiting to be transcribed.

Inbox: This contains completed transcriptions that have been delivered to the Dictator.

Rejected: This contains transcriptions that have been returned by the Dictator for rework.

Final: This contains transcriptions that have been esigned by the Dictator, as well as transcriptions that have been finalized without being esigned.

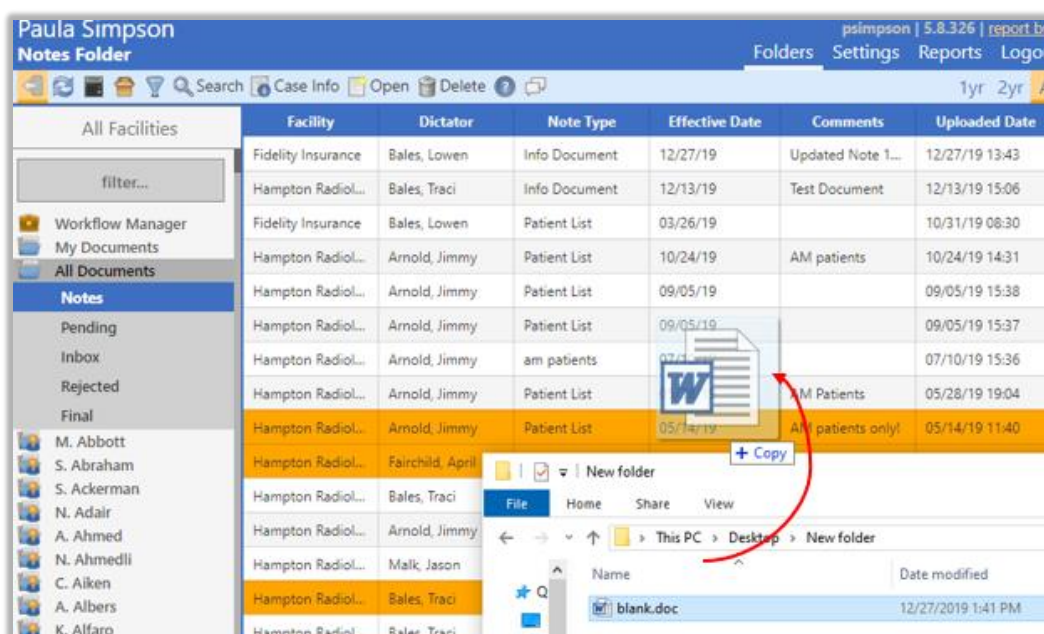


## Notes

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.



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

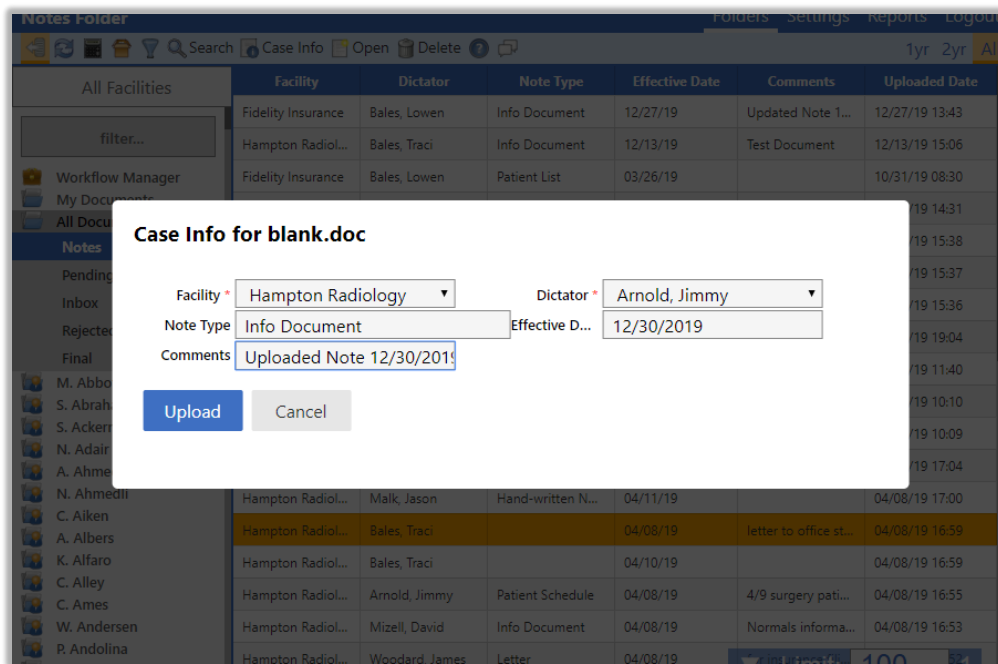
**Facility:** This provides with a dropdown menu allowing the user to select a Facility name.

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

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

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

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



**Case Info for blank.doc**

Facility \* Hampton Radiology Dictator \* Arnold, Jimmy

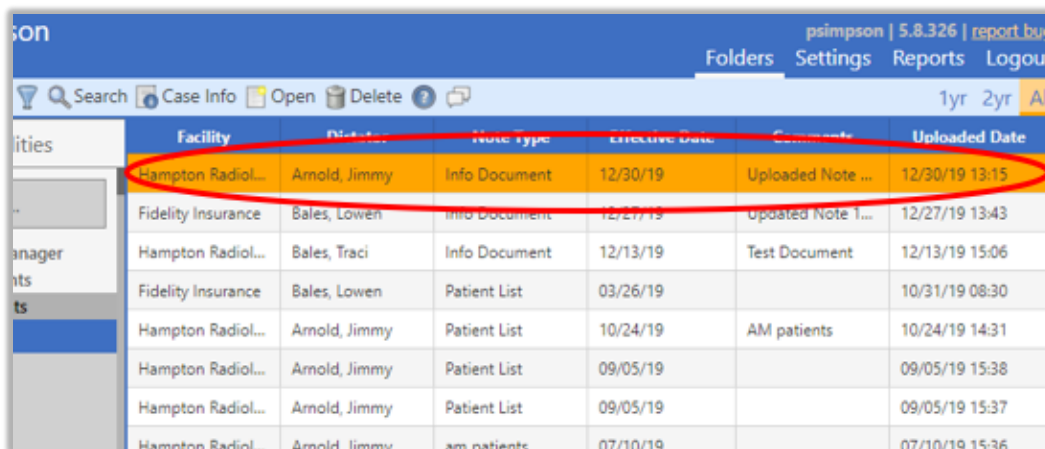
Note Type Info Document Effective D... 12/30/2019

Comments Uploaded Note 12/30/2019

Upload Cancel

Facility	Dictator	Note Type	Effective Date	Comments	Uploaded Date
Fidelity Insurance	Bales, Lowen	Info Document	12/27/19	Updated Note 1...	12/27/19 13:43
Hampton Radiol...	Bales, Traci	Info Document	12/13/19	Test Document	12/13/19 15:06
Fidelity Insurance	Bales, Lowen	Patient List	03/26/19		10/31/19 08:30
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, Jimmy	am patients	07/10/19		07/10/19 15:36

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.



Facility	Dictator	Note Type	Effective Date	Comments	Uploaded Date
Hampton Radiol...	Arnold, Jimmy	Info Document	12/30/19	Uploaded Note ...	12/30/19 13:15
Fidelity Insurance	Bales, Lowen	Info Document	12/27/19	Updated Note 1...	12/27/19 13:43
Hampton Radiol...	Bales, Traci	Info Document	12/13/19	Test Document	12/13/19 15:06
Fidelity Insurance	Bales, Lowen	Patient List	03/26/19		10/31/19 08:30
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, Jimmy	am patients	07/10/19		07/10/19 15:36

## Folder Management Functions

All available Folder Management Functions viewable in the All Documents Inbox and their descriptions can be found starting on page 19.

## Columns

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

### *Column Management*

Unlike other Folders, column management features are limited to column arranging, and column ascending/descending capabilities. See page 36 for a full description of column management features.

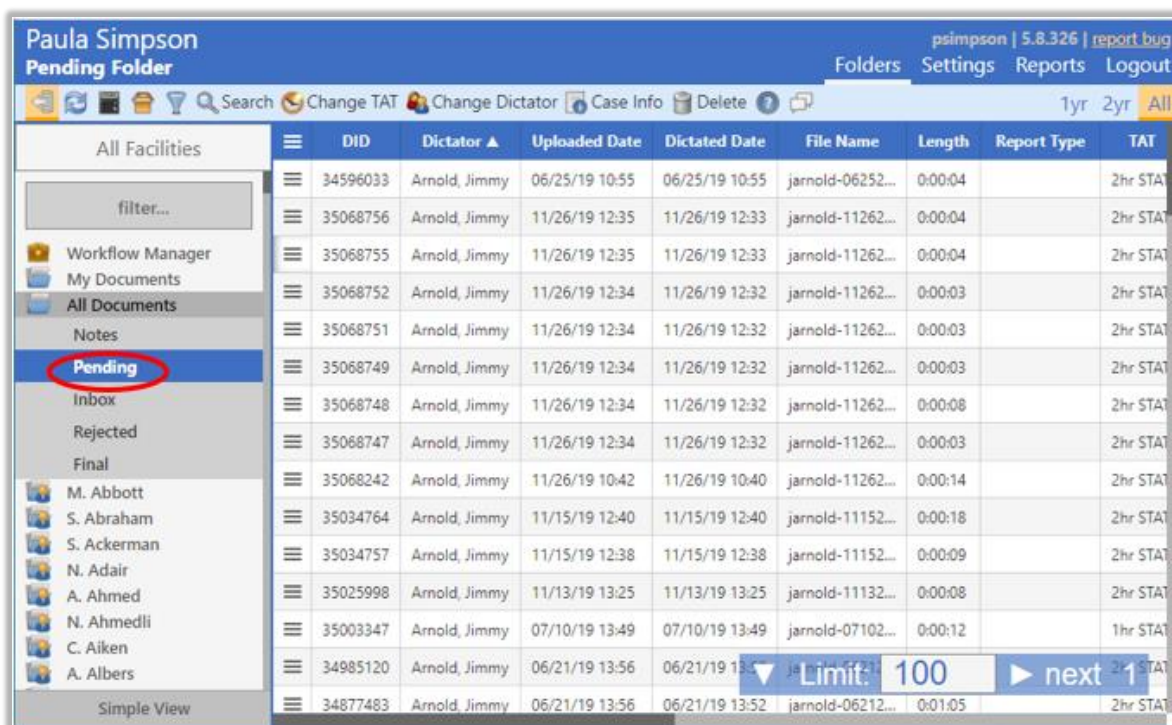
This section displays the notes.

### *File Action Menu*

All available “File Action Menu” options viewable in the All Documents Inbox and their descriptions can be found starting on page 46.

## Pending

The All Documents Pending folder is a slightly different view than the My Documents Inbox, although at first glance they would appear to contain the same content. This Pending folder gives the Transcription Team a view of how the Facility users see files that have not yet been delivered. In other words, it contains dictations waiting to be transcribed and transcriptions in the QA workflow, but no on-screen indication is given if a file is in a Pending status or a QA status.



DID	Dictator	Uploaded Date	Dictated Date	File Name	Length	Report Type	TAT
34596033	Arnold, Jimmy	06/25/19 10:55	06/25/19 10:55	jarnold-06252...	0:00:04		2hr STAT
35068756	Arnold, Jimmy	11/26/19 12:35	11/26/19 12:33	jarnold-11262...	0:00:04		2hr STAT
35068755	Arnold, Jimmy	11/26/19 12:35	11/26/19 12:33	jarnold-11262...	0:00:04		2hr STAT
35068752	Arnold, Jimmy	11/26/19 12:34	11/26/19 12:32	jarnold-11262...	0:00:03		2hr STAT
35068751	Arnold, Jimmy	11/26/19 12:34	11/26/19 12:32	jarnold-11262...	0:00:03		2hr STAT
35068749	Arnold, Jimmy	11/26/19 12:34	11/26/19 12:32	jarnold-11262...	0:00:03		2hr STAT
35068748	Arnold, Jimmy	11/26/19 12:34	11/26/19 12:32	jarnold-11262...	0:00:08		2hr STAT
35068747	Arnold, Jimmy	11/26/19 12:34	11/26/19 12:32	jarnold-11262...	0:00:03		2hr STAT
35068242	Arnold, Jimmy	11/26/19 10:42	11/26/19 10:40	jarnold-11262...	0:00:14		2hr STAT
35034764	Arnold, Jimmy	11/15/19 12:40	11/15/19 12:40	jarnold-11152...	0:00:18		2hr STAT
35034757	Arnold, Jimmy	11/15/19 12:38	11/15/19 12:38	jarnold-11152...	0:00:09		2hr STAT
35025998	Arnold, Jimmy	11/13/19 13:25	11/13/19 13:25	jarnold-11132...	0:00:08		2hr STAT
35003347	Arnold, Jimmy	07/10/19 13:49	07/10/19 13:49	jarnold-07102...	0:00:12		1hr STAT
34985120	Arnold, Jimmy	06/21/19 13:56	06/21/19 13:52	jarnold-06212...	0:01:05		2hr STAT
34877483	Arnold, Jimmy	06/21/19 13:56	06/21/19 13:52	jarnold-06212...	0:01:05		2hr STAT

## Folder Management Functions

All available Folder Management Functions viewable in the All Documents Inbox and their descriptions can be found starting on page 19.

## Columns

All available columns viewable in the All Documents Pending and their descriptions can be found starting on page 36.

### Column Management

See page 36 for a full description of column management features.

## File Display

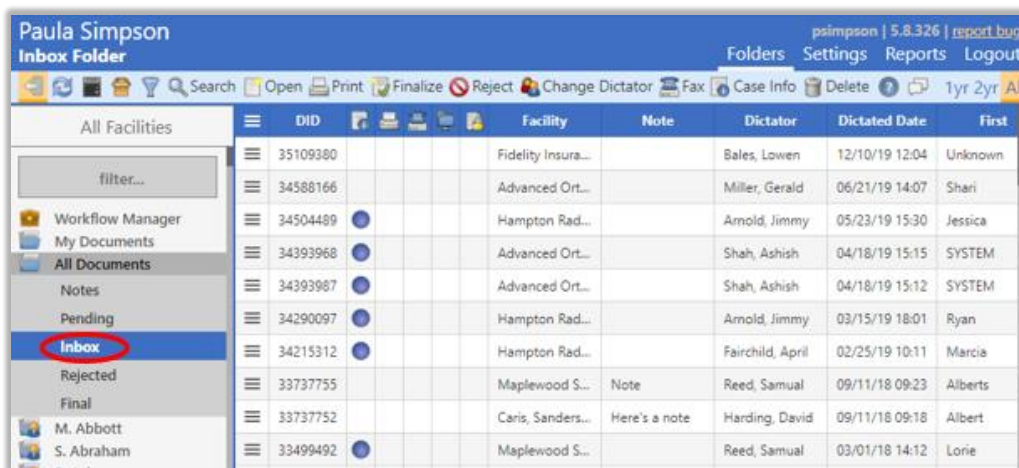
This section displays the dictations. All visible dictations in this folder are of the Pending status. For a detailed description of available file statuses and their meaning, see page 46.

### *File Action Menu*

All available “File Action Menu” options viewable in the All Documents Pending and their descriptions can be found starting on page 46.

## Inbox

The “Inbox” folder contains the transcriptions completed by the Transcription Team. Documents can be opened, edited, faxed and printed. The transcriptions can be Finalized or eSigned (by the dictating provider) and moved to the “Final” folder for archive.



DID	Facility	Note	Dictator	Dictated Date	First
35109380	Fidelity Insura...		Bales, Lowen	12/10/19 12:04	Unknown
34588166	Advanced Ort...		Miller, Gerald	06/21/19 14:07	Shari
34504489	Hampton Rad...		Arnold, Jimmy	05/23/19 15:30	Jessica
34393968	Advanced Ort...		Shah, Ashish	04/18/19 15:15	SYSTEM
34393987	Advanced Ort...		Shah, Ashish	04/18/19 15:12	SYSTEM
34290097	Hampton Rad...		Arnold, Jimmy	03/15/19 18:01	Ryan
34215312	Hampton Rad...		Fairchild, April	02/25/19 10:11	Marcia
33737755	Maplewood S...	Note	Reed, Samuel	09/11/18 09:23	Alberts
33737752	Caris, Sanders...	Here's a note	Harding, David	09/11/18 09:18	Albert
33499492	Maplewood S...		Reed, Samuel	03/01/18 14:12	Lorie

## Folder Management Functions

All available Folder Management Functions viewable in the All Documents Inbox and their descriptions can be found starting on page 19.

Functions unique to the All Documents Inbox are:

### Fax

Transcriptions can be faxed directly from the Portal, via either an automatic setting or manually. For instructions on automatic faxing, please see page 92.

To manually fax transcription(s) from the portal:

Click the “Fax” icon in the toolbar to open the “Send Fax” application.

This window is divided into two sections:

- Search for Fax Recipient
- Add New Fax Recipient

1

2

### Send Fax

Search to locate fax recipient(s)

☐ include cover sheet

Add new fax recipient(s)

☐ save to address book

## 1 Search on Fax Recipient

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

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

### Send Fax

Search to locate fax recipient(s)

☐ include cover sheet

Select fax recipient(s)
 

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

☐ save to address book

### Send Fax

Search to locate fax recipient(s)

☐ include cover sheet

Select fax recipient(s)
 

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

☐ save to address book

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

**Send Fax**

Search to locate fax recipient(s)

201

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

☐ 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

☐ include cover sheet

Add new fax recipient(s)

John Kramer  124-509-9227

☐ save to address book

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

Notes on adding fax recipients:

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



**Send Fax**

Search to locate fax recipient(s)

name or fax number

Select fax recipient(s)

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

☐ include cover sheet

Add new fax recipient(s)

John Kramer 124-509-9227

☐ save to address book

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

**Send Fax**

Search to locate fax recipient(s)

201

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

☐ save to address book

- Checking the “save to address book” checkbox will add the name and fax number to the Address Book for future use.
- Checking the “include cover sheet” checkbox will add the cover sheet to the fax as a first page. More information about the cover sheet can be found on page 120.
- The “Close” button closes the window without sending the Fax while the “Send Fax” button sends the fax to the selected recipients.

## Columns

All available columns viewable in the All Documents Inbox and their descriptions can be found starting on page 36.

Columns unique to the All Documents Inbox are:

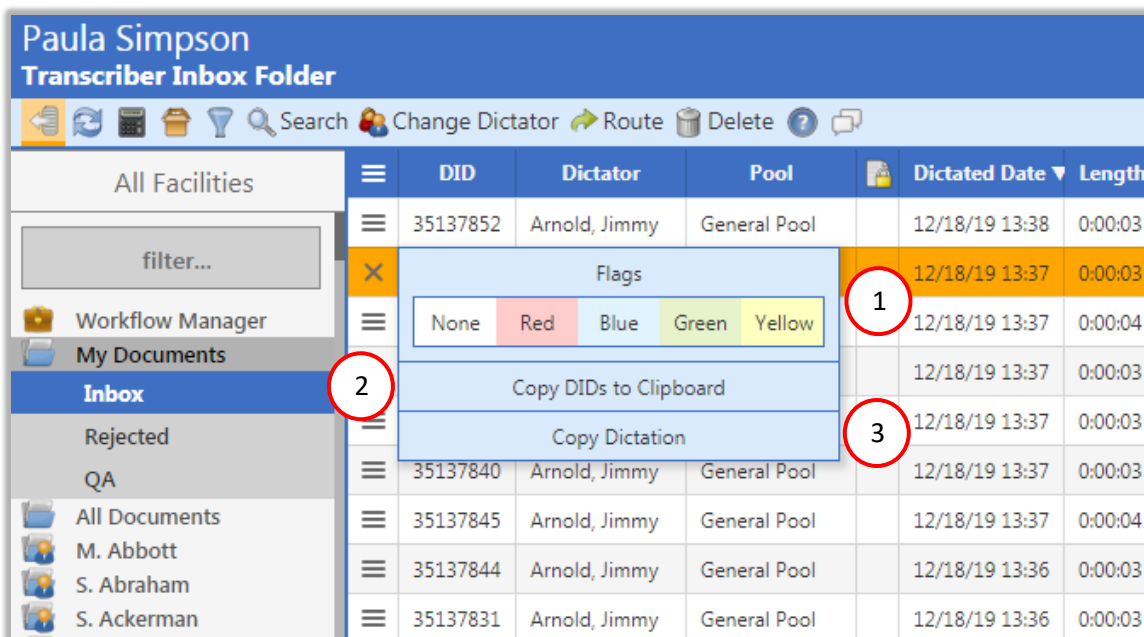
Interfaced: This column displays if a transcription has been interfaced or not. See page 36 for a full description of interface setups.

### Column Management

See page 46 for a full description of column management features.

## File Display

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 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.



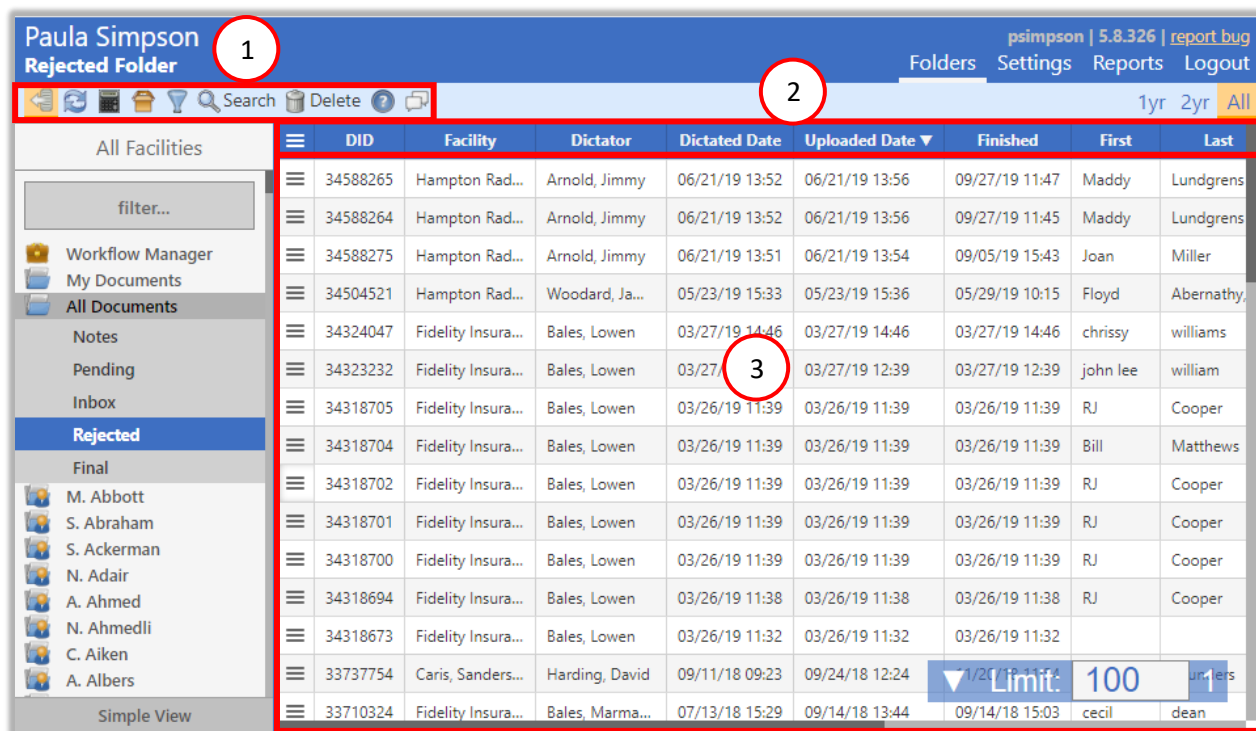
The screenshot shows the 'Paula Simpson Transcriber Inbox Folder' interface. On the left is a sidebar with 'All Facilities' and a list of folders: 'Workflow Manager', 'My Documents', 'Inbox' (selected), 'Rejected', 'QA', 'All Documents', 'M. Abbott', 'S. Abraham', and 'S. Ackerman'. The main area displays a table of transcriptions. A context menu is open over the second row, showing options: 'Flags' (with sub-options: None, Red, Blue, Green, Yellow), 'Copy DIDs to Clipboard', and 'Copy Dictation'. Three red circles with numbers 1, 2, and 3 highlight specific elements: 1 points to the 'Flags' menu, 2 points to the 'Inbox' folder in the sidebar, and 3 points to the 'Copy Dictation' menu option.

	DID	Dictator	Pool	Dictated Date	Length
	35137852	Arnold, Jimmy	General Pool	12/18/19 13:38	0:00:03
				12/18/19 13:37	0:00:03
				12/18/19 13:37	0:00:04
				12/18/19 13:37	0:00:03
				12/18/19 13:37	0:00:03
	35137840	Arnold, Jimmy	General Pool	12/18/19 13:37	0:00:03
	35137845	Arnold, Jimmy	General Pool	12/18/19 13:37	0:00:04
	35137844	Arnold, Jimmy	General Pool	12/18/19 13:36	0:00:03
	35137831	Arnold, Jimmy	General Pool	12/18/19 13:36	0:00:03

- 1 Flags: A detailed description of “Flags” is found on page 46, in the Workflow Manager section.
- 2 Copy DIDs to Clipboard: A detailed description of “Copy DIDs to Clipboard” is found on page 47, in the Workflow Manager section.
- 3 Copy Dictation: A detailed description of “Copy Dictation” is found on page 47, in the Workflow Manager section.

## Rejected

The Rejected folder contains the transcriptions that the dictator has rejected and returned to the Transcription Team for further corrections or edits. The Rejected folder is sometimes also used by the Transcription Team as a holding area for documents needing special assistance of some kind.



**Paula Simpson**  
**Rejected Folder**

psimpson | 5.8.326 | [report bug](#)  
Folders Settings Reports Logout

1yr 2yr All

filter...

Workflow Manager  
My Documents  
All Documents  
Notes  
Pending  
Inbox  
**Rejected**  
Final  
M. Abbott  
S. Abraham  
S. Ackerman  
N. Adair  
A. Ahmed  
N. Ahmedli  
C. Aiken  
A. Albers

Simple View

DID	Facility	Dictator	Dictated Date	Uploaded Date	Finished	First	Last
34588265	Hampton Rad...	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	09/27/19 11:47	Maddy	Lundgrens
34588264	Hampton Rad...	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	09/27/19 11:45	Maddy	Lundgrens
34588275	Hampton Rad...	Arnold, Jimmy	06/21/19 13:51	06/21/19 13:54	09/05/19 15:43	Joan	Miller
34504521	Hampton Rad...	Woodard, Ja...	05/23/19 15:33	05/23/19 15:36	05/29/19 10:15	Floyd	Abernathy,
34324047	Fidelity Insura...	Bales, Lowen	03/27/19 14:46	03/27/19 14:46	03/27/19 14:46	chrissy	williams
34323232	Fidelity Insura...	Bales, Lowen	03/27/19 12:39	03/27/19 12:39	03/27/19 12:39	john lee	william
34318705	Fidelity Insura...	Bales, Lowen	03/26/19 11:39	03/26/19 11:39	03/26/19 11:39	RJ	Cooper
34318704	Fidelity Insura...	Bales, Lowen	03/26/19 11:39	03/26/19 11:39	03/26/19 11:39	Bill	Matthews
34318702	Fidelity Insura...	Bales, Lowen	03/26/19 11:39	03/26/19 11:39	03/26/19 11:39	RJ	Cooper
34318701	Fidelity Insura...	Bales, Lowen	03/26/19 11:39	03/26/19 11:39	03/26/19 11:39	RJ	Cooper
34318700	Fidelity Insura...	Bales, Lowen	03/26/19 11:39	03/26/19 11:39	03/26/19 11:39	RJ	Cooper
34318694	Fidelity Insura...	Bales, Lowen	03/26/19 11:38	03/26/19 11:38	03/26/19 11:38	RJ	Cooper
34318673	Fidelity Insura...	Bales, Lowen	03/26/19 11:32	03/26/19 11:32	03/26/19 11:32		
33737754	Caris, Sanders...	Harding, David	09/11/18 09:23	09/24/18 12:24	1/20/19 10:11		
33710324	Fidelity Insura...	Bales, Marma...	07/13/18 15:29	09/14/18 13:44	09/14/18 15:03	cecil	dean

Limit: 100

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 files.

## Folder Management Functions

All available Folder Management Functions viewable in the All Documents Rejected and their descriptions can be found starting on page 19.

## Columns

All available columns viewable in the All Documents Rejected and their descriptions can be found starting on page 36.

### *Column Management*

See page 36 for a full description of column management features.

## File Display

This section displays transcriptions that have been rejected by the Dictator. All visible transcriptions in this folder are of the Rejected status. For a detailed description of available file statuses and their meaning, see page 46.

### *File Action Menu*

All available “File Action Menu” options viewable in the All Documents Rejected and their descriptions can be found starting on page 46.

## Final

The “Final” folder works as an archive to store finalized and/or eSigned transcriptions. Documents are still accessible from within the Final folder, and many of the same actions are available in the Final folder that are available in the Inbox, depending on the access rights of the user.

### Folder Management Functions

All available Folder Management Functions viewable in the All Documents Rejected and their descriptions can be found starting on page 19.

### Columns

All available columns viewable in the All Documents Final and their descriptions can be found starting on page 36.

### *Column Management*

See page 36 for a full description of column management features.

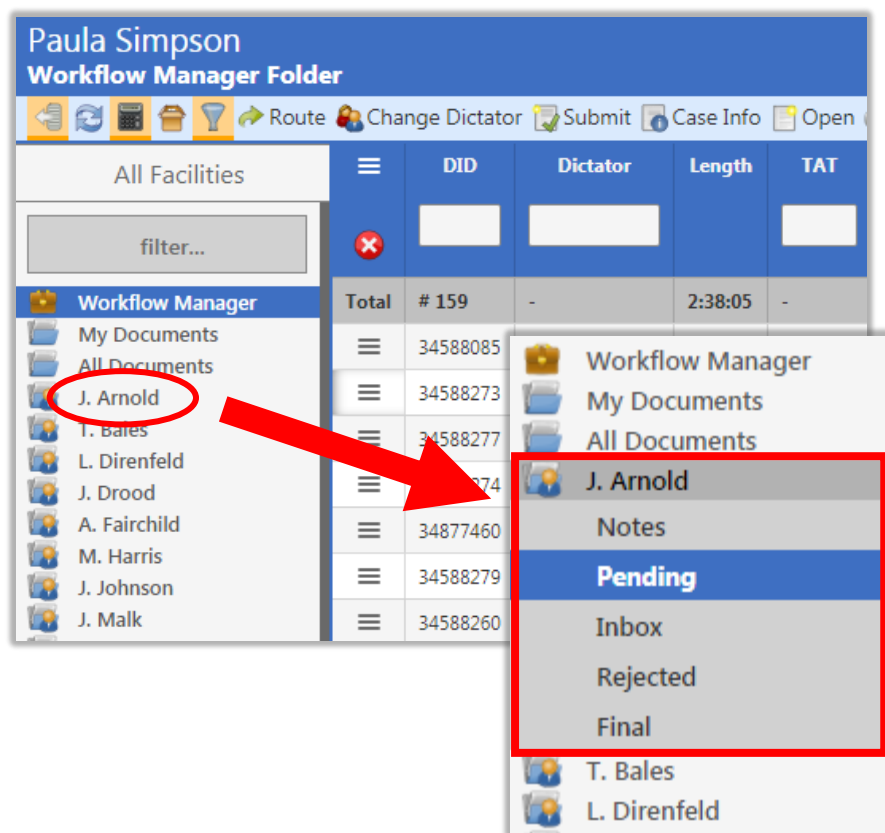
### File Display

This section displays transcriptions that have been finalized by the Dictator. All visible transcriptions in this folder are of the Finalized status. For a detailed description of available file statuses and their meaning, see page 46.

### *File Action Menu*

All available “File Action Menu” options viewable in the All Documents Final and their descriptions can be found starting on page 46.

## Dictator Folders



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

Clicking a Dictator name expands the view to expose the folders available for each Dictator. Folders are permission-based, but typically include Pending, Inbox, Rejected and Final. A full description of the features and functions of each of these folders can be found in the user manuals for Facilities.

## Document Management

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

### Automatic faxing (auto-fax)

Transcriptions can be faxed to recipients automatically based on different trigger criteria, or rules. Rules can be set at the sender (Dictator) level, or at the recipient level.

#### Auto-fax from Sender (Dictator) Level

Auto-fax rules at the sender (Dictator) level are accessed via Settings >Account Settings > Dictators screen. Options available are:

##### *Auto Fax Trigger*

Auto-faxing will occur if these criteria are met:

1. The Auto Fax box is checked.
2. An Auto Fax Trigger is selected (More details on Triggers can be found on page 160).
3. Transcriptionist adds CC recipients during the transcription workflow. Please note: CC recipients must be added within the template's bookmark and must have fax numbers listed in the address book, in order for the auto-fax feature to function.

##### *Fax All to Office*

If this option is checked, the transcription will be auto-faxed to the Dictator's office if these criteria are met:

1. The Auto Fax box is checked.
2. An Auto Fax Trigger is selected (trigger options explained below).
3. The Dictator's fax number is listed in the address book.

##### *Fax All to User*

The transcription will be auto-faxed to other Dictators at the same Facility using this feature. Other Dictators at the Facility are added via the dropdown, and once added display as highlighted tags in the section below the dropdown.



Hampton Radiology Settings

psimpson | 5.8.340 | report\_bug

Folders Settings Reports Logout

Export

Hampton Radiology first or last name

My Settings

Account Settings

Locations

Users

Associations

Dictators

Bill Settings

Templates

Patient Import

First	Last	Transcriber	Pool	2.0 ID
Jimmy	Arnold		General Pool	9050
John	Blackwell	Paula Simpson		
April	Fairchild			9054
Jimmy	Johnson		General Pool	
Jason	Malk			
Daniel	McLaughlin			9060
Isha	Mehta		Cardio Pool	1028
David	Mizell			
James	Renault			19374
Marvin	Sanders			
Charles	Tille			10283
James	Woodard			

Save

Transcriber

Pool

QA Percent

0

Fax Settings

Auto Fax

Auto Fax Trigger

eSigned

Fax All to Office

Fax All to User

John Blackwell

Jason Malk

## Auto-fax from Recipient Level

Auto-fax rules at the recipient (Address Book) level are accessed via Settings > My Settings > Address Book screen. The only options available is for the Auto Fax Trigger.

Hampton Radiology Settings

psimpson | 5.8.340 | report\_bug

Folders Settings Reports Logout

Export Address Book

Hampton Radiology name or number Search Clear

My Settings

Change Password

Fax Log

Address Book

Fax Cover Sheet

Account Settings

Practice Name	Location	Fax	Phone	City	State	Auto Fax	Trigg
ABADEER, PETE...	Medical Hills In...	(309) 661-3394	(309) 663-8311...	Bloomington	IL		Finalized
ABDEL-MEGUL...		8159379310	8159379300	Kankakee	IL		Finalized
Alice Smith	Kingsport, TN	(555) 555-5555					(None Sel
Bob Jones	ABC Street	(777) 777-3687	0 -				Sent to In
Bush Family Pr...		(423) 595-6254	423-971-6323	Bristol	TN		(None Sel
Cardiology Ass...	Westminster C...	(512) 991-2284		Morrison	TN		
Corneliu Anton...		(907) 459-3555	(907) 459-3520	Fairbanks	AK		Immediat
Cornerstone In...	Bullock County	(888) 215-4471		Macon	GA		Immediat
Cornerstone In...	Salisbury	(212) 555-1212		Macon	MS		
Deer Valley Fa...	Phoenix	(702) 555-1212	(602) 942-0648	Phoenix	AZ		Finalized
Dept of Surgery		(777) 555-1212					
Doen Pediatrics		(555) 121-2121					
Dr. Alan Stone		(246) 583-8484	0 - Ext.				eSigned
Dr. Alan Wilson		(786) 887-3331	0 -	Kingsport	TN		Sent to In
Dr. Albert Jones		(201) 555-1212					Finalized
Dr. Alice Keen		(555) 555-5555	555-555-5555	Johnson City	TN		eSigned
Dr. Andrew Phil...		0 -	0 - Ext.				eSigned
DR. BHASIN		(708) 799-2411	(708) 799-3044	HAZELCREST	IL		
DR. BHOOPAL		(708) 388-4933	(708) 388-4911	PAOLS HEIGHTS	IL		
Dr. David Andr...		0 -	0 - Ext.				eSigned
Dr. David Harris		(575) 837-5467	0 - Ext.				eSigned
Dr. David Smel...		(346) 546-4768	0 - Ext.				eSigned

Save New Delete

Address Book Details

Practice Name

Location

Fax

Phone

Address 1

Address 2

Address 3

Address 4

City

State

Zip

Auto Fax

Autofax Trigger

(None Selected)

(None Selected)

Immediately

Sent to Inbox

Finalized

eSigned

Once the Auto Fax trigger has been set, Transcriptionist adds CC recipients during the transcription workflow. See page 13 of the Transcription Software manual for more details.

## Auto Print

For details about how to set up Auto Print function, please contact WebChartMD Support team at [support@webchartmd.com](mailto:support@webchartmd.com)

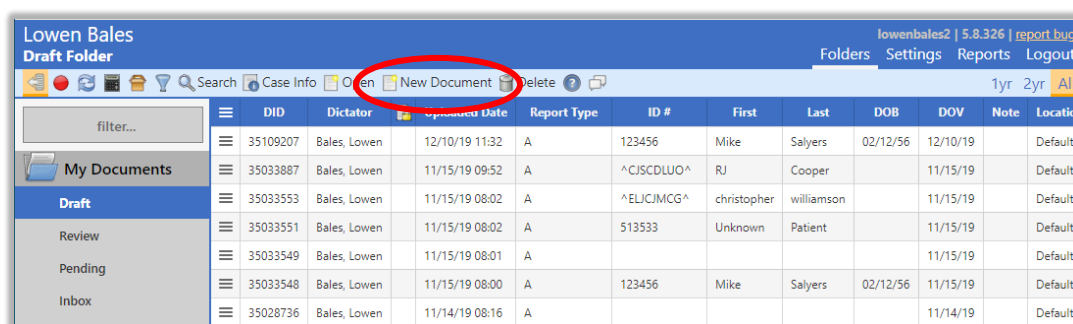
## Using Dragon with WebChartMD

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

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

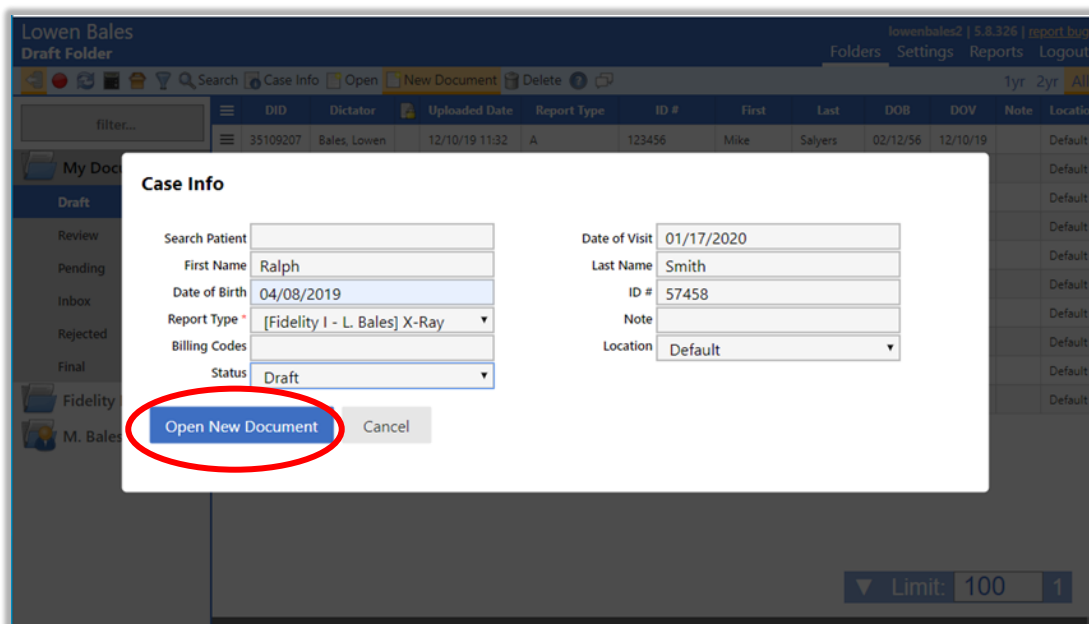
To incorporate front end speech recognition into the workflow, the Dictator follows these steps:

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



2. Click the "Case Info" window to enter demographics and make other selections relevant to the dictation.
  - a. Add patient information if desired (not required).
  - b. Search for the patient using the "Search Patient" field. Previously transcribed patients will present in the search box.
  - c. Select the "Report Type" (required entry) to use in conjunction with the workflow.
  - d. Select the "Status" for the file (required). If "Draft" is selected, the completed document will route to the Transcription Team for review and clean-up. If "Inbox" is selected, the document will by-pass QA and move directly to the Dictator's Inbox.

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



Lowen Bales Draft Folder

lowenbales2 | 5.8.326 | report\_bug

Folders Settings Reports Logout

1yr 2yr All

filter...

My Documents

Draft

Review

Pending

Inbox

Rejected

Final

Fidelity

M. Bales

Case Info

Search Patient

First Name: Ralph

Date of Birth: 04/08/2019

Report Type: [Fidelity I - L. Bales] X-Ray

Billing Codes

Status: Draft

Date of Visit: 01/17/2020

Last Name: Smith

ID #: 57458

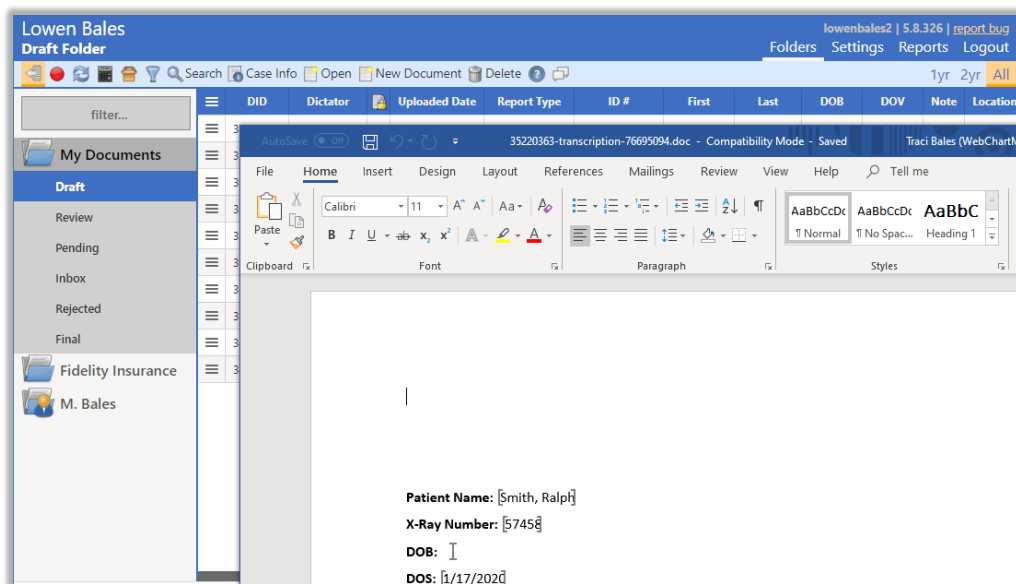
Note

Location: Default

Open New Document Cancel

Limit: 100 1

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



Lowen Bales Draft Folder

lowenbales2 | 5.8.326 | report\_bug

Folders Settings Reports Logout

1yr 2yr All

filter...

My Documents

Draft

Review

Pending

Inbox

Rejected

Final

Fidelity Insurance

M. Bales

AutoSave 35220363-transcription-76695094.doc - Compatibility Mode - Saved Traci Bales (WebChartMD)

File Home Insert Design Layout References Mailings Review View Help Tell me

Clipboard Font Paragraph Styles

Patient Name: [Smith, Ralph]

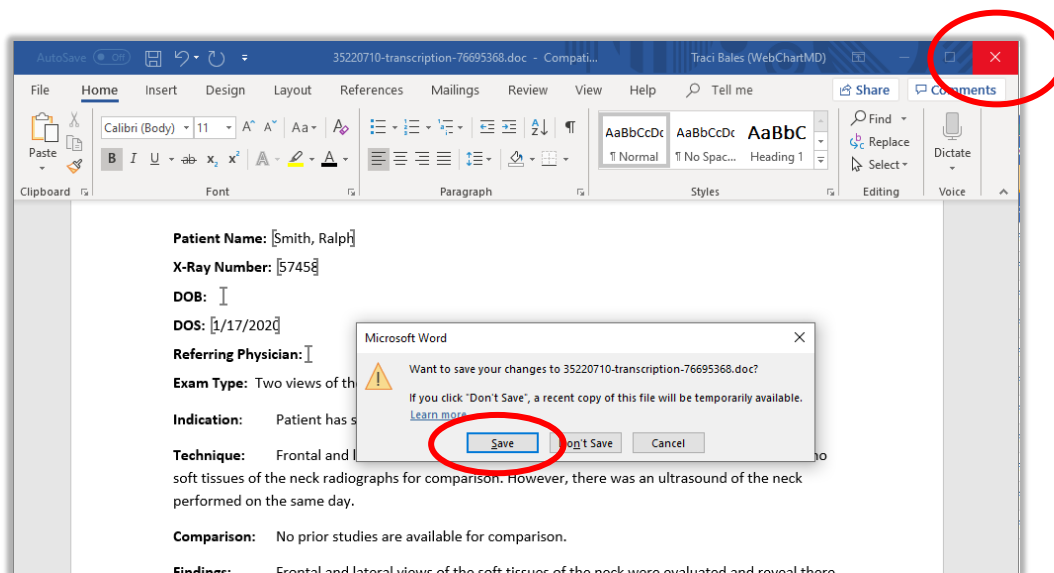
X-Ray Number: [57458]

DOB: [04/08/2019]

DOS: [01/17/2020]

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

5. Once completed, the Dictator presses “Save” to save the completed document.
6. Once saved and closed, the document will follow the routing rules selected in the “Status” dropdown as mentioned in 2.d above.



## File Status

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

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

QA: This status means that the dictation has been transcribed by the Transcriptionist and has been forwarded internally to the Transcription Team QA staff for quality checks.

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

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

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

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

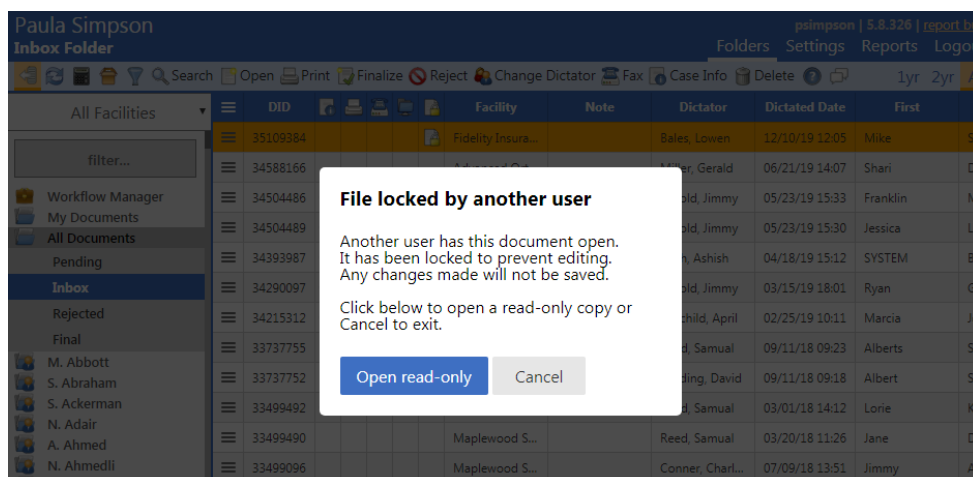
**Deleted:** this status means the dictation or transcription has been removed from the workflow and no longer accessible. Note – Documents can be taken out of the “Deleted” status by using the “Move” feature in the Workflow Manager. See page 34 for more details.

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

## Document Locking

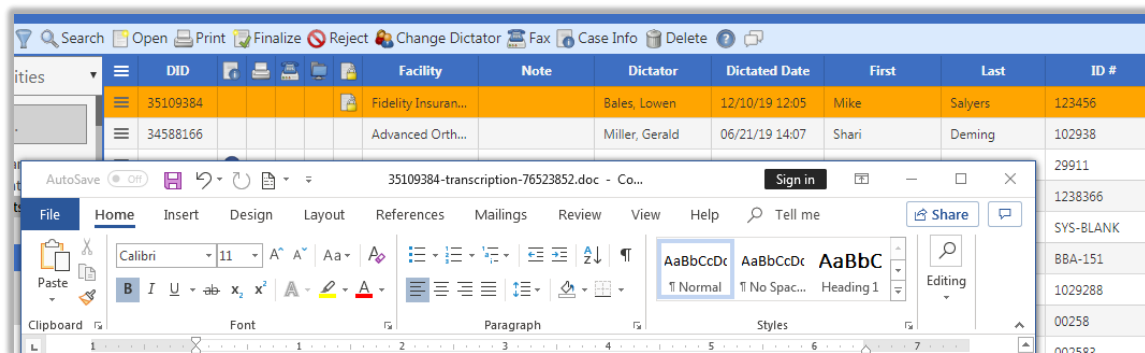
WebChartMD locks a document once opened by a user to prevent multiple users from accessing the document at the same time. Hovering over the “lock” icon on screen displays information about who is currently accessing the document, and the date/time of the access.

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

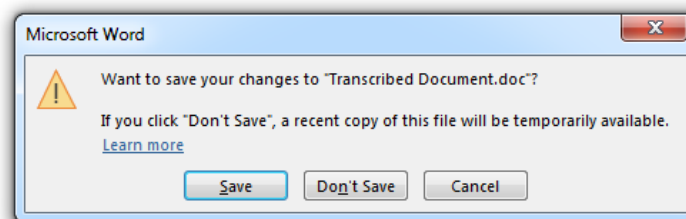


## Edit

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

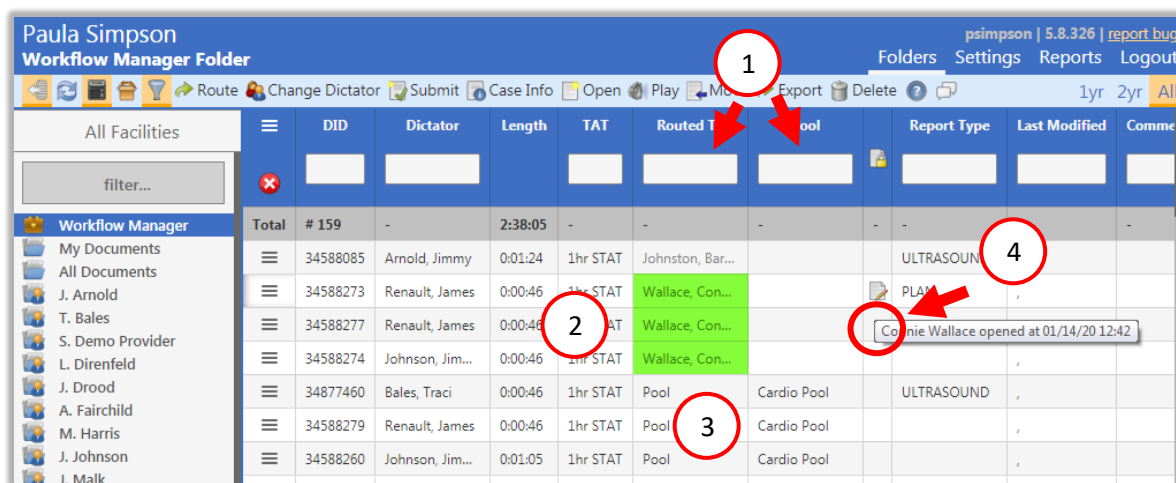


After edits are complete, save and close the transcription using the normal tools and workflow found within Microsoft Word. Clicking the “Save” button (below) saves changes to the authoritative copy of the transcription stored on the WebChartMD server and closes the transcription. Clicking “Don’t Save”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



## Routing

Routing options within WebChartMD enable a variety of different routing options, and routing views. Some typical routing scenarios are described below:



	DID	Dictator	Length	TAT	Routed To	Pool	Report Type	Last Modified	Comments
Total	# 159	-	2:38:05	-	-	-	-	-	-
	34588085	Arnold, Jimmy	0:01:24	1hr STAT	Johnston, Bar...		ULTRASOUND		
	34588273	Renault, James	0:00:46	1hr STAT	Wallace, Con...		PLAY		
	34588277	Renault, James	0:00:46	1hr STAT	Wallace, Con...				Connie Wallace opened at 01/14/20 12:42
	34588274	Johnson, Jim...	0:00:46	1hr STAT	Wallace, Con...				
	34877460	Bales, Traci	0:00:46	1hr STAT	Pool	Cardio Pool	ULTRASOUND		
	34588279	Renault, James	0:00:46	1hr STAT	Pool	Cardio Pool			
	34588260	Johnson, Jim...	0:01:05	1hr STAT	Pool	Cardio Pool			

- 1 Direct Routing: When dictations are routed directly to a transcriptionist or editor (instead of being assigned via a pool), the transcriptionist's name appears in the "Routed To" column, and no text appears in the Pool column (see image above).

### Notes on Direct Routing:

1. The Transcription Team Admin can direct route dictations to a specific Transcriptionist' queue, either through an assignment made in the Settings View (see page 158), or by using the "Route" button in the toolbar.
2. Unlike dictations routed via pools, which are subject to a time limit for remaining in queue if not transcribed, dictations direct routed remain with the transcription to whom they were routed indefinitely.

- 2 Pool Routing: WebChartMD has a robust pool management system that is described in detail in the Workflow Rules section of the Settings view, see page 200. When dictations are routed via pools, dictations display the word "Pool" in the "Routed To" column and the specific pool name in the "Pool" column.

#### Notes on Pool Routing:

1. These dictations only stay in the queue while the transcriptionist is active. This is indicated by the green colored cell highlight. If a transcriptionist becomes inactive, the color changes to yellow highlight.
2. Once the transcriptionist logs out of the system, the dictations are returned to the pool and display information as noted in #3 "Dictations in Pool".

3

Once a dictation or dictations are routed out to a transcriptionist or editor, the "Routed To" cell for the dictations will update from the word "Pool" to the name of the person to whom the files were routed.

4

Locked: Once a transcriptionist begins typing a dictation, the system locks that dictation and displays a "Locked" icon in the "Locked" column.

#### Additional notes on Routing:

1. Files populate into the transcriptionist or editor's workflow in a first-in-first out prioritization. Files marked with a STAT priority supersede files with a standard TAT.

### Using the Manual "Routing" Feature

A "Routing" button exists in a number of Transcription Team toolbars. This is used to manually route a dictation.

To manually route, select a dictation and click the "Route" button. This opens a panel with a dropdown listing of all transcriptionists, editors, and pools. Select the desired routing assignment and click "Change". The new routing assignment will appear in the "Routed To" column.

#### Additional notes on manual routing:

1. Manually routed files over-ride any maximum time settings made for the transcriptionist or editor. Routing assignments (page 99), Pool setups & associations (page 214) and Workflow Rules (page 200) governing system routing provide more information.

### Interfacing

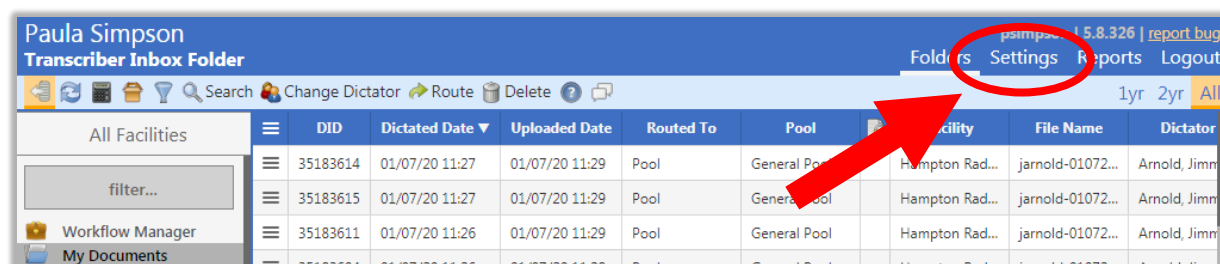
The Interface feature is part of a workflow created for interfacing transcriptions into electronic health record systems. For more information on creating custom interfaces, contact WebChartMD support. For a description of the "Interface Re-export" feature, see page 68.



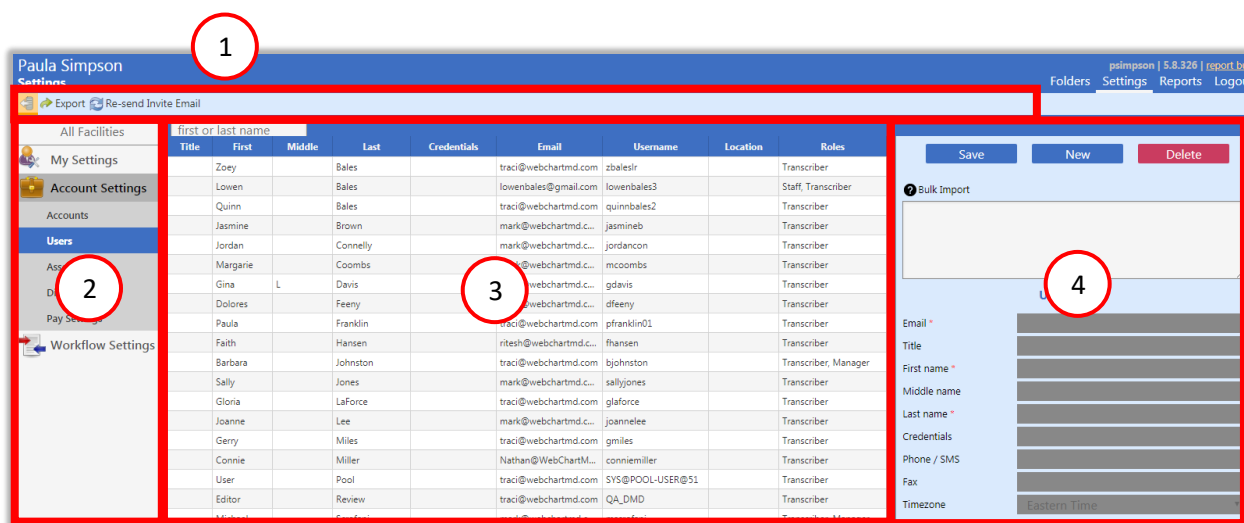
## Settings View

## Settings View Overview

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



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



- 1 **Folder Management Functions:** This Tools within the Folder Management toolbar vary according to the settings folder and permission levels of the user.
- 2 **Settings Pane:** This section displays different settings grouped into sections and subsections, providing the user with an ease of making changes.

- 3 User Section: This central section of the “Settings View” usually displays lists of users, both Transcription Team users and Facility users, to select from while editing their individual settings.
- 4 Details Panel: This panel in the right side usually provides the fields and dropdown menus of the actual settings.

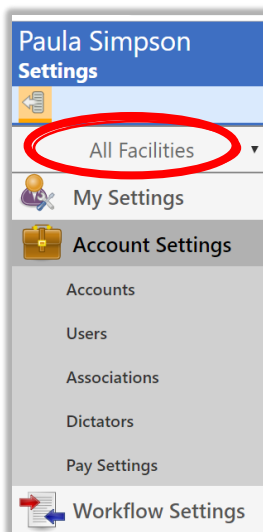
### Folder Management Functions

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

## Settings Pane

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

### View for All Facilities



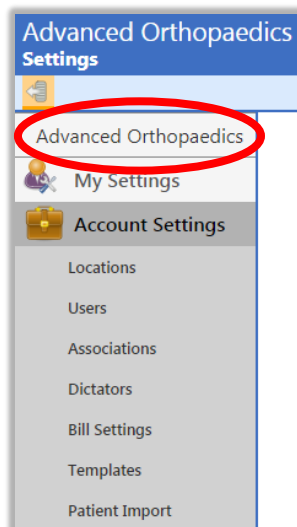
Below the “All Facilities” view are three functional areas:

**My Settings** contains settings options and house-keeping tasks unique to the signed-in user and the Transcription Team in general.

**Account Settings** contains a series of functional areas used by the Transcription Team to create new Facility accounts and workflow setups.

**Workflow Settings** contains powerful workflow control settings useful to the Transcription Team.

### View for Named Facility

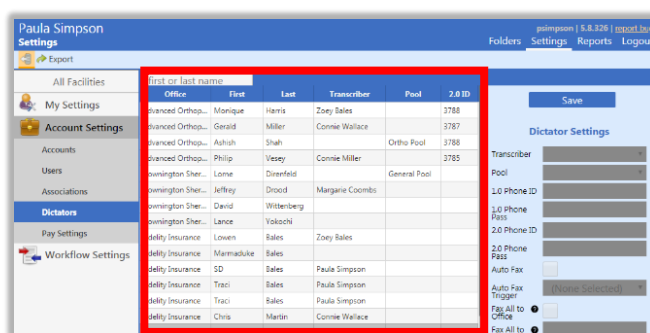


**My Settings** contains settings options and house-keeping tasks unique to the named Facility in the dropdown.

**Account Settings** a several functional settings used by the Transcription Team to manage the named Facility and its workflow setups.

## 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:



Paula Simpson Settings | 5.8.326 | report.log | Folders Settings Reports Logout

Export

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

First or last name	Office	First	Last	Transcriber	Pool	2.0 ID
Advanced Orthop...	Manique	Harris	Zoe Bales		3788	
Advanced Orthop...	Gerald	Miller	Connie Wallace		3787	
Advanced Orthop...	Ashish	Shah		Ortho Pool	3788	
Advanced Orthop...	Philip	Vesey	Connie Miller		3785	
Downtown Sher...	Lorne	Dorenfeld		General Pool		
Downtown Sher...	Jeffrey	Drood	Margie Coombs			
Downtown Sher...	David	Wittenberg				
Downtown Sher...	Lance	Volochi				
Relay Insurance	Loren	Bales	Zoe Bales			
Relay Insurance	Marmaduke	Bales				
Relay Insurance	SD	Bales	Paula Simpson			
Relay Insurance	Traci	Bales	Paula Simpson			
Relay Insurance	Traci	Bales	Paula Simpson			
Relay Insurance	Chris	Martin	Connie Wallace			

Save

Dictator Settings

Transcriber

Pool

1.0 Phone ID

1.0 Phone Pass

2.0 Phone ID

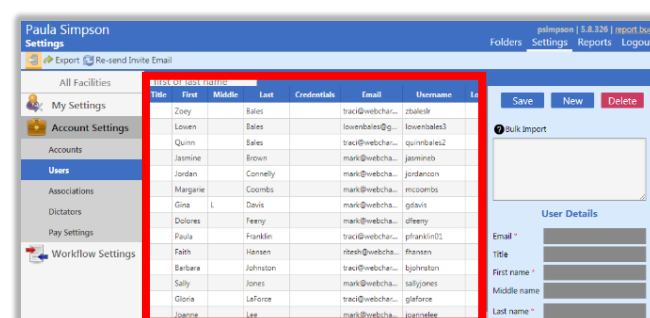
2.0 Phone Pass

Auto Fax

Auto Fax Trigger

Tag All to Office

Fax All to



Paula Simpson Settings | 5.8.326 | report.log | Folders Settings Reports Logout

Export Re-send Invite Email

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

First or last name	First	Last	Credentials	Email	Username	Last
Zoe		Bales		traci@webchart...	zoebales	
Loren		Bales		lorenbales@...	lorenbales3	
Quinn		Bales		traci@webchart...	quinnbales2	
Jasmine		Brown		mark@webchart...	jasmineb	
Jordan		Connelly		mark@webchart...	jordancon	
Margie		Coombs		mark@webchart...	mcombs	
Gina	L	Davis		mark@webchart...	gdavis	
Dolores		Ferry		mark@webchart...	dferry	
Paula		Franklin		traci@webchart...	pfranklin02	
Fahn		Hansen		zish@webchart...	fhansen	
Barbara		Johnston		traci@webchart...	bjohnston	
Sally		Jones		mark@webchart...	sallyjones	
Gloria		Laforce		traci@webchart...	glaforce	
Joanne		Lee		mark@webchart...	jlee	

Save New Delete

Bulk Import

User Details

Email

Title

First name

Middle name

Last name



Paula Simpson Settings | 5.8.326 | report.log | Folders Settings Reports Logout

Export

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Name	Facility	Dictator	Template	Priority	Transcriber
A Production ...	Hampton Radi...	Jimmy Arnold	Hampton Radi...		Connie Wallace
Connie Wallace...	Hampton Radi...	James Renault	Hampton Ra - ...	2hr STAT	
A for New MTs	Hampton Radi...				
A Connie Wal...	Downtowning Sh...	Lorne Dorenfeld	Downtowning S...	Standard	Connie Wallace
Training Pool - ...					Gerry Miles
A Arnold MRIs	Hampton Radi...	Jimmy Arnold	Hampton Radi...		Connie Miller
Connie's probl...		Jimmy Arnold	Hampton Radi...		Jasmine Brown
r. Shah Blanka...	Advanced Orth...	Ashish Shah	Advanced Ort...	2hr STAT	
r. Miller STAT ...	Advanced Orth...	Gerald Miller	Advanced Ort...		Barbara Johnst...
Johnston - O...	Advanced Orth...	Gerald Miller	Advanced Ort...		
mith Workflow		John Smith	Fidelity Insur...		

Save New Delete

Workflow Rules

Name

Facility

Dictator

Template

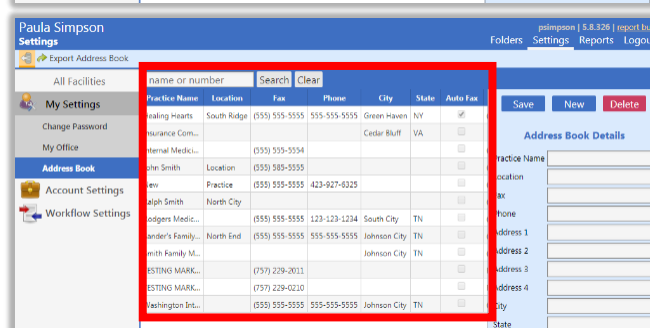
Priority

Status

Tag

Transcriber

Pool



Paula Simpson Settings | 5.8.326 | report.log | Folders Settings Reports Logout

Export Address Book

All Facilities

My Settings

Change Password

My Office

Address Book

Account Settings

Workflow Settings

Name or number	Search	Clear	Practice Name	Location	Fax	Phone	City	State	Auto Fax
Training Hearts			South Ridge	(555) 555-5555	555-555-5555	Green Haven	NY		<input checked="" type="checkbox"/>
Insurance Com...				(555) 555-5554		Cedar Bluff	VA		<input type="checkbox"/>
Internal Medic...				(555) 555-5555					<input type="checkbox"/>
the Smith			Location	(555) 585-5555					<input type="checkbox"/>
ew			Practice	(555) 555-5555	423-927-0325				<input type="checkbox"/>
alph Smith			North City	(555) 555-5555	123-123-1234	South City	TN		<input type="checkbox"/>
edgers Medic...			North End	(555) 555-5555	555-555-5555	Johnson City	TN		<input type="checkbox"/>
ardner's Family...				(757) 229-2011		Johnson City	TN		<input type="checkbox"/>
Smith Family M...				(757) 229-0210					<input type="checkbox"/>
ESTING MARK...				(555) 555-5555	555-555-5555	Johnson City	TN		<input type="checkbox"/>
Washington Int...									<input type="checkbox"/>

Save New Delete

Address Book Details

Practice Name

Location

Fax

Phone

Address 1

Address 2

Address 3

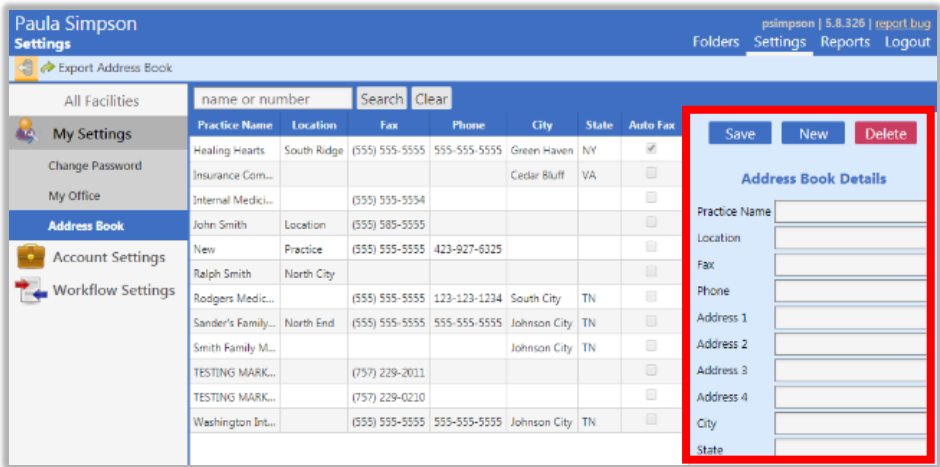
Address 4

City

State

## Details Panel

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



The screenshot shows the 'Settings' view for Paula Simpson. The left sidebar contains navigation options: My Settings, Change Password, My Office, Address Book (selected), Account Settings, and Workflow Settings. The main area displays a table of address book entries. A red box highlights the 'Address Book Details' panel on the right, which includes fields for Practice Name, Location, Fax, Phone, Address 1 through 4, City, and State, along with Save, New, and Delete buttons.

Practice Name	Location	Fax	Phone	City	State	Auto Fax
Healing Hearts	South Ridge	(555) 555-5555	555-555-5555	Green Haven	NY	<input checked="" type="checkbox"/>
Insurance Com...				Cedar Bluff	VA	<input type="checkbox"/>
Internal Medici...		(555) 555-5554				<input type="checkbox"/>
John Smith	Location	(555) 585-5555				<input type="checkbox"/>
New	Practice	(555) 555-5555	423-927-6325			<input type="checkbox"/>
Ralph Smith	North City					<input type="checkbox"/>
Rodgers Medic...		(555) 555-5555	123-123-1234	South City	TN	<input type="checkbox"/>
Sander's Family...	North End	(555) 555-5555	555-555-5555	Johnson City	TN	<input type="checkbox"/>
Smith Family M...				Johnson City	TN	<input type="checkbox"/>
TESTING MARK...		(757) 229-2011				<input type="checkbox"/>
TESTING MARK...		(757) 229-0210				<input type="checkbox"/>
Washington Int...		(555) 555-5555	555-555-5555	Johnson City	TN	<input type="checkbox"/>

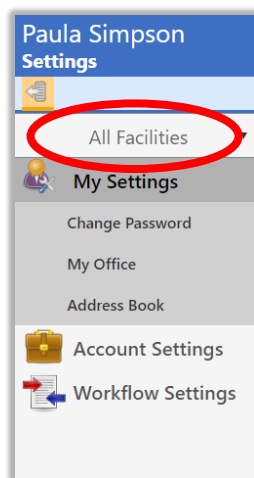
Details Panel highlighted

## My Settings

The Settings Menu that displays when the dropdown in the upper left corner of the Settings Pane is selected changes depending on the selection made. There are two views available: All Facilities and Named Facilities.

### “All Facilities” View

When “All Facilities” is selected in the dropdown, the “My Settings” section of the Settings Pane provides the user with settings and features related to the Transcription Team workflow. (as a note, the Portal also displays the name of the user logged into the portal in the top left corner of the screen, see below).



Within the My Settings area of the “All Facilities” view, there are three administrative functions: .

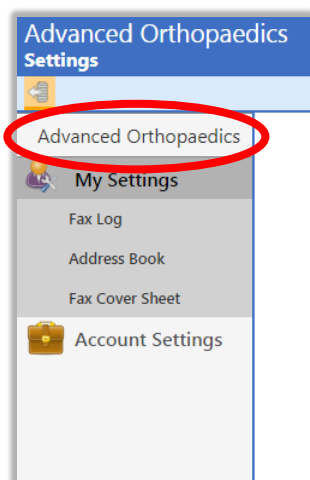
**Change Password** is used for password updating.

**My Office** is used to make global / Transcription Team-wide changes for certain workflow related tasks.

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

### Named Facility View

When a Facility name is selected in the dropdown, the menu changes to display settings for that Facility. The Portal displays the name of the Facility at the top, indicating that the settings being viewed are for the selected Facility.



Within the My Settings area of a named Facility view, there are three administrative functions:

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

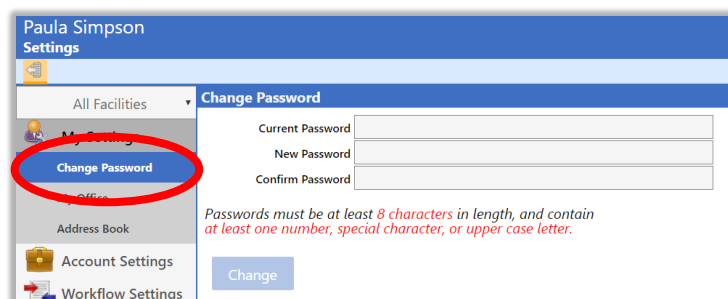
**Address Book** is used to access and manage the address book associated with the specific Facility.

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

## “All Facilities” Functions

### Change Password

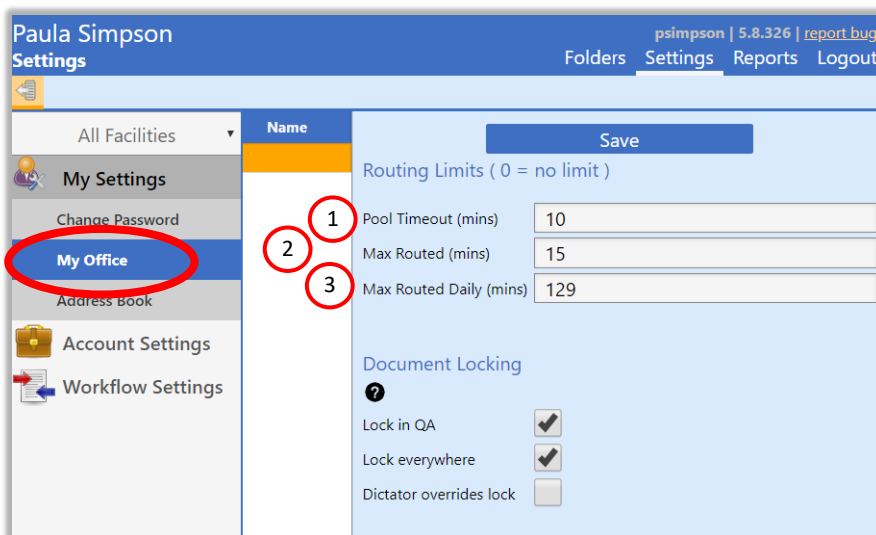
Under My Settings, the **Change Password** feature enables the user to do a password change for his/her account. Passwords must be at least eight characters, and contain at least one number, special character or upper-case letter.



### My Office

This is a settings area that enables the user to make global / Transcription Team-wide changes for certain workflow related tasks such as routing and document locking. “My Office” is comprised of two sections: “Routing Limits” and “Document Locking”.





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Settings | Folders | Settings | Reports | Logout

All Facilities ▼ Name

My Settings

Change Password

**My Office**

Address Book

Account Settings

Workflow Settings

Save

Routing Limits ( 0 = no limit )

1 Pool Timeout (mins) 10

2 Max Routed (mins) 15

3 Max Routed Daily (mins) 129

Document Locking

Lock in QA ☒

Lock everywhere ☒

Dictator overrides lock ☐

### Routing Limits:

Understanding the “Routing Limits” section is an important part of setting up transcription workflows. Routing limits set up under My Office function as global settings, meaning, they govern all members of the Transcription team. Routing limits can also be set up at the Transcriptionist level (Settings->Account Settings->Users) to manage individual limits.

Since the Routing Limits (at the global level and the Transcriptionist level) are part of the same feature, it will be described here for both.

Routing Limits consists of three settings:

- 1 Pool Timeout (mins)
- 2 Max Routing (mins)
- 3 Max Routed Daily (mins)

### Pool Timeout Setting

Pool Timeout is a setting that defines how long (minutes) a Transcriptionist can be idle (meaning, the computer has not detected any keystrokes) before the dictations are removed from his/her queue and returned to the pool.

For example, if a Transcriptionist has 10 minutes set in the Pool Timeout and has had no keyboard activity detected by the system for 10 minutes, the dictations in his/her queue will be returned to the pool.

#### Notes on Pool Timeout Settings

1. Entering “0” as the timeout setting will prevent the Transcriptionist from ever timing out. Keep in mind that a setting of “0” will force dictations to remain in the Transcriptionist’s queue, even if he/she is idle for long periods, and that dictations in the Transcriptionist’s queue will remain in his/her queue even after the Transcriptionist has logged out of the application.
2. If no value is entered into the Pool Timeout field under My Settings, the system will automatically assign a value of 20 minutes. At the individual Transcriptionist level, if no value is entered, the system automatically defaults to the My Settings value.
3. If Pool Timeout settings are set at the individual Transcriptionist level, those individual settings over-ride the global settings. For example, if Pool Timeout is set at 20 minutes under My Settings, but Transcriptionist Jane Smith has an individual setting of 40 minutes, then all Transcriptionists on the team will have a Pool Timeout of 20 minutes with the exception of Jane, whose Pool Timeout will be 40 minutes.

#### Max Routed (mins)

Max (short for maximum) Routed (mins) is a setting that defines the maximum number of minutes of dictations that a Transcriptionist will have in his/her queue at a time. As with the other Routing Limits settings, Max Routed (mins) can be set at either the Global or individual Transcriptionist level.

#### Notes on Max Routed Setting

1. **\*\* Please note: The Max Routed setting is a critical setting for managing Transcriptionist workflow and may cause file routing issues if not carefully managed. Until a value is entered by the Transcription Team under My Settings->Max Routed (min), the default system setting is 15 minutes.**
2. Setting the Max Routed at too high a setting for a specific Transcriptionist could lead to that Transcriptionist receiving more work than other Transcriptionists working in the same pool. For example, let’s say a Transcriptionist’s Max Routed setting is set to 50 minutes, and 50 minutes of dictations are currently in the pool. If this Transcriptionist logs in ahead of other Transcriptionists in the same pool, he/she will be sent all 50 minutes of dictation, with other Transcriptionists receiving none.
3. If the Max Routed is set to “0”, there will be no limit on the number of minutes of dictations that will download to the Transcriptionist. In other words, a single Transcriptionist could be sent all dictations in every pool he/she belongs to if the value is set to “0”.

4. The “Maximum dictations per transcriber” feature sets a maximum on the total number of dictations that can be downloaded by a Transcriptionist and does provide a safeguard or upper limit. See page 214 for more details on this feature.
5. If a value is not set at the individual Transcriptionist level, the system will use the Max Routed (mins) setting under My Office to determine minutes of audio to route. If neither the individual nor the My Office setting is set, the system default used will be the 15 minute maximum.

### Max Routed Daily (mins)

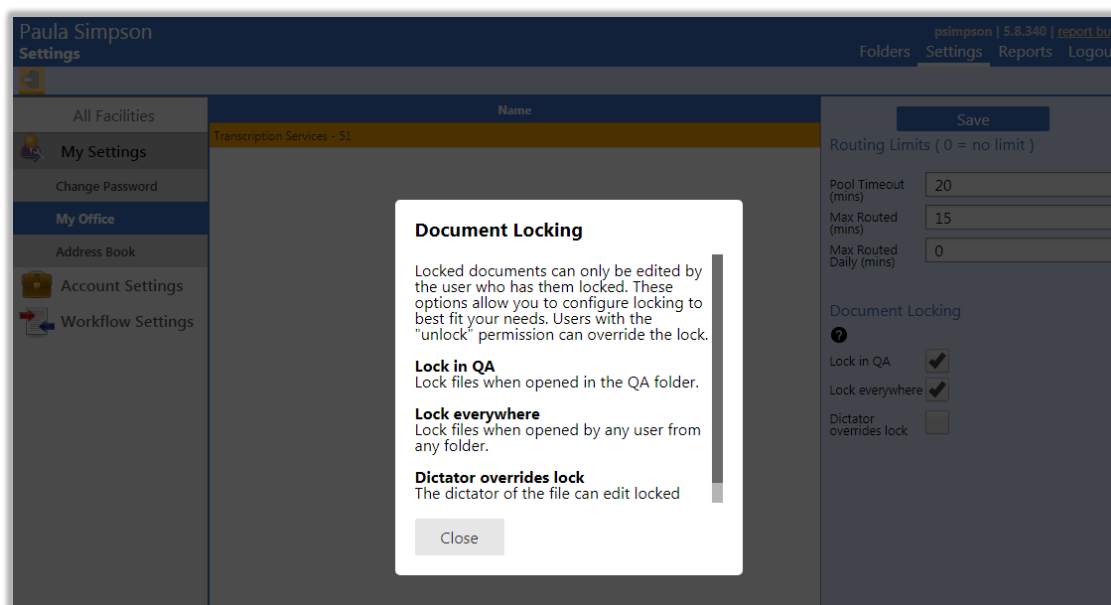
Max (short for maximum) Routed Daily (mins) is a global setting that defines the maximum number of minutes of audio that can be routed with a Transcriptionist within 24 hours. Once this number of minutes has been reached, the system does not send any further dictations to the Transcriptionist until the end of the 24-hour period (the 24-hour period runs 12:01 am to 12:00 midnight, central time).

### Notes on Max Routed Daily (mins)

1. Entering “0” as the Max Routed Daily means that there is no limit to the minutes of work the Transcriptionist can receive in 24 hours.

If no value is entered into the Max Routed Daily (mins), the system default is to allow an unlimited number of minutes per Transcriptionist per day.

### Document Locking:



WebChartMD locks a transcription when it is opened by a user. This is to avoid the transcription being accidentally overwritten by another user. This behavior can be modified based on Transcription Team and Facility needs as described below:

Lock in QA – Checking this option locks the transcription in the QA folder only to everyone except the user currently accessing the transcription. Unchecking this option allows multiple users to access the transcription simultaneously.

Lock everywhere – Checking this option locks the transcription in all folders to everyone except the user currently accessing the transcription. Unchecking this option allows multiple users to access the transcription simultaneously in any folder.

Dictator overrides lock – Checking this option allows Dictators to become the authoritative user of the transcription, even if another user is accessing the transcription at the time of the Dictator's access. Unchecking this option prevents Dictators from opening the Authoritative Copy of the document when another user already is accessing the transcription.

Notes on Document Locking:

1. If the “Locked everywhere” permission and the “Dictator overrides lock” permission are both checked, then the “Dictator overrides lock” allows the Dictator to be able to edit transcriptions even if the document is locked by another user. It basically disables the “Locked everywhere” permission for Dictators.

## Address Book

Although the Address Book is seen in the Settings Pane under All Facilities, it is not used. Address Books are stored and maintained under each respective named Facility. See the Address Book section on page 115 for more information.

## Named Facility Functions

As mentioned earlier, within the My Settings area of a named Facility view are three administrative functions, found in the Settings Pane: Fax Log, Address Book, and Fax Cover Sheet. This section covers those functions in detail.

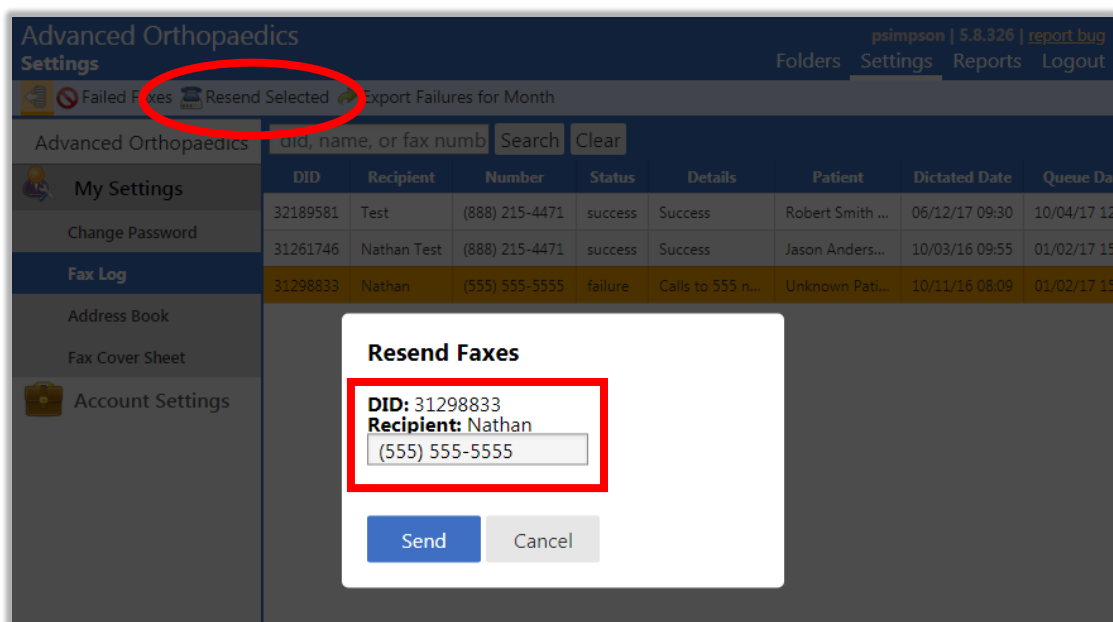
### Fax Log

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:

Hampton Radiology									
Settings									
<a href="#">Failed Faxes</a> <a href="#">Resend Selected</a> <a href="#">Export Failures for Month</a>									
Hampton Radiology	did, name, or fax numb			Search	Clear				
	DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Date	Process Date
My Settings	34877487	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu...	Mercy Kline (s...	06/21/19 13:56	12/05/19 14:16	12/05/19 14:16
Change Password	34588256	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu...	smith lowen (^...	06/21/19 13:57	12/05/19 14:16	12/05/19 14:16
Fax Log	34588072	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu...	James McCord ...	06/21/19 13:52	12/05/19 14:16	12/05/19 14:16
Address Book	34588220	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu...	James Arrowo...	06/21/19 14:01	12/05/19 14:16	12/05/19 14:16
Fax Cover Sheet	34290094	Dr. Jenny Lawr...	(888) 215-4471	success	Success	Abe Mueller (2...	03/15/19 17:58	04/23/19 11:59	04/23/19 12:00
Account Settings	33282793	James Miller MD	(888) 215-4471	success	Success	Jim Cooper (29...	04/30/18 12:30	04/18/19 14:03	04/18/19 14:04
	34336896	AutoFax - Corn...	(212) 555-1212	failure	Calls to 555 nu...	Sam White (13...	04/01/19 14:23	04/11/19 10:17	04/11/19 10:17
	34336102	AutoFax - Corn...	(212) 555-1212	failure	Calls to 555 nu...	Pollie Miles (19...	04/01/19 12:09	04/11/19 10:17	04/11/19 10:17
	32163790	Dr. Jenny Lawr...	(888) 215-4471	success	Success	Amber Bachma...	06/12/17 09:30	03/04/19 15:56	03/04/19 15:59
	32163797	Dr. Jenny Lawr...	(888) 215-4471	success	Success	Lowen Bales (4...	06/12/17 09:30	03/04/19 15:56	03/04/19 15:57
	33678471	AutoFax - Corn...	(212) 555-1212	failure	Calls to 555 nu...	test test (999)	09/05/18 10:52	01/10/19 11:51	01/10/19 11:51
	33678456	AutoFax - Corn...	(212) 555-1212	failure	Calls to 555 nu...	Floyd Abernath...	08/07/18 05:44	11/13/18 13:40	11/13/18 13:40
	33723095	AutoFax - Corn...	(212) 555-1212	failure	Calls to 555 nu...	Alice Smith (10...	09/19/18 11:01	11/13/18 13:40	11/13/18 13:40
	30995044	AutoFax - Web...	(888) 215-4471	success	Success	Frank Smith (0...	08/15/16 11:51	09/18/18 14:39	09/18/18 14:40

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

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

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

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

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

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

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

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

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

## Address Book

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

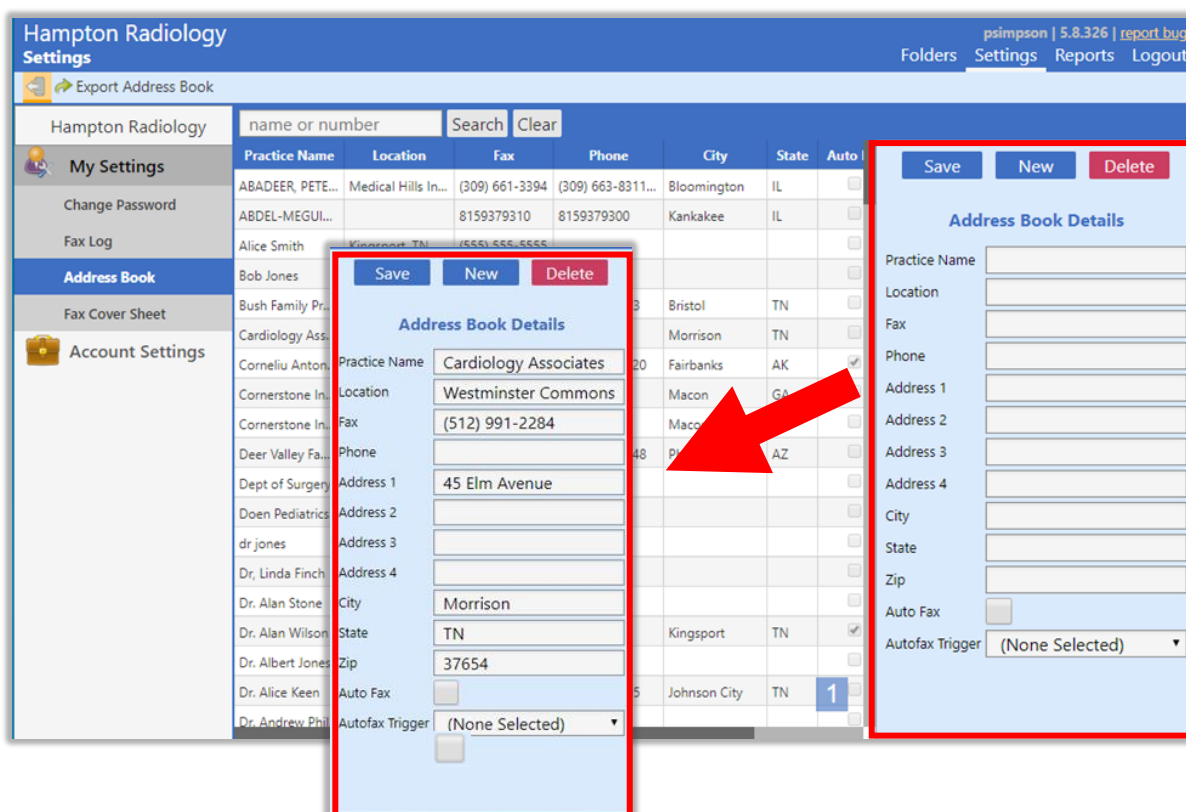
### Accessing Facility Address Books

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

### Adding an entry

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

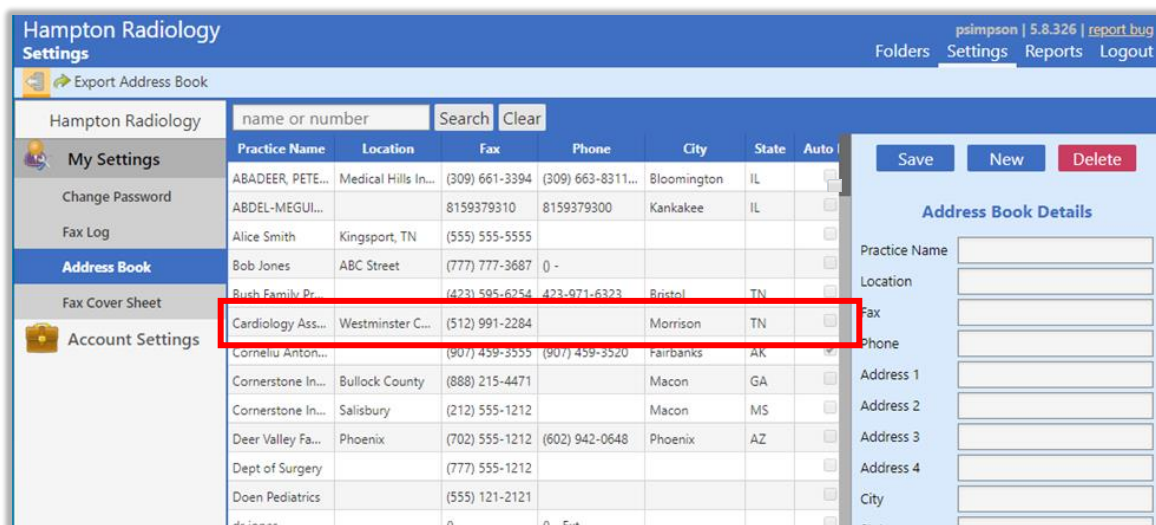
1. Press the “New” button in the Details Panel.
2. Fill in the applicable fields in the “Address Book Details” window, then click “Save”.



The screenshot shows the 'Hampton Radiology Settings' page. On the left, there's a sidebar with 'My Settings', 'Address Book', and 'Account Settings'. The 'Address Book' section is active, showing a table of entries. A modal window titled 'Address Book Details' is open, allowing a new entry to be added. The modal has fields for Practice Name, Location, Fax, Phone, City, State, and Address. A red arrow points to the 'New' button in the modal window.

Practice Name	Location	Fax	Phone	City	State	Auto
ABADEER, PETE...	Medical Hills In...	(309) 661-3394	(309) 663-8311...	Bloomington	IL	
ABDEL-MEGUL...		8159379310	8159379300	Kankakee	IL	
Alice Smith	Kingsport, TN	(555) 555-5555				
Bob Jones						
Bush Family Pr...				Bristol	TN	
Cardiology Ass...				Morrison	TN	
Cornelius Anton...				Fairbanks	AK	
Cornerstone In...				Macon	GA	
Cornerstone In...				Macon	GA	
Deer Valley Fa...				Phoenix	AZ	
Dept of Surgery						
Doen Pediatrics						
Dr. Jones						
Dr. Linda Finch...						
Dr. Alan Stone				Morrison		
Dr. Alan Wilson						
Dr. Albert Jones						
Dr. Alice Keen						
Dr. Andrew Phil...						

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



Practice Name	Location	Fax	Phone	City	State	Auto I
ABADEER, PETE...	Medical Hills In...	(309) 661-3394	(309) 663-8311...	Bloomington	IL	<input type="checkbox"/>
ABDEL-MEGUI...		8159379310	8159379300	Kankakee	IL	<input type="checkbox"/>
Alice Smith	Kingsport, TN	(555) 555-5555				<input type="checkbox"/>
Bob Jones	ABC Street	(777) 777-3687	() -			<input type="checkbox"/>
Rush Family Dr...		(423) 595-6254	423-971-6323	Bristol	TN	<input type="checkbox"/>
Cardiology Ass...	Westminister C...	(512) 991-2284		Morrison	TN	<input type="checkbox"/>
Lorneliu Anton...		(907) 459-3555	(907) 459-3520	Fairbanks	AK	<input type="checkbox"/>
Cornerstone In...	Bullock County	(888) 215-4471		Macon	GA	<input type="checkbox"/>
Cornerstone In...	Salisbury	(212) 555-1212		Macon	MS	<input type="checkbox"/>
Deer Valley Fa...	Phoenix	(702) 555-1212	(602) 942-0648	Phoenix	AZ	<input type="checkbox"/>
Dept of Surgery		(777) 555-1212				<input type="checkbox"/>
Doen Pediatrics		(555) 121-2121				<input type="checkbox"/>
dr Jones		() -	() - Ext			<input type="checkbox"/>

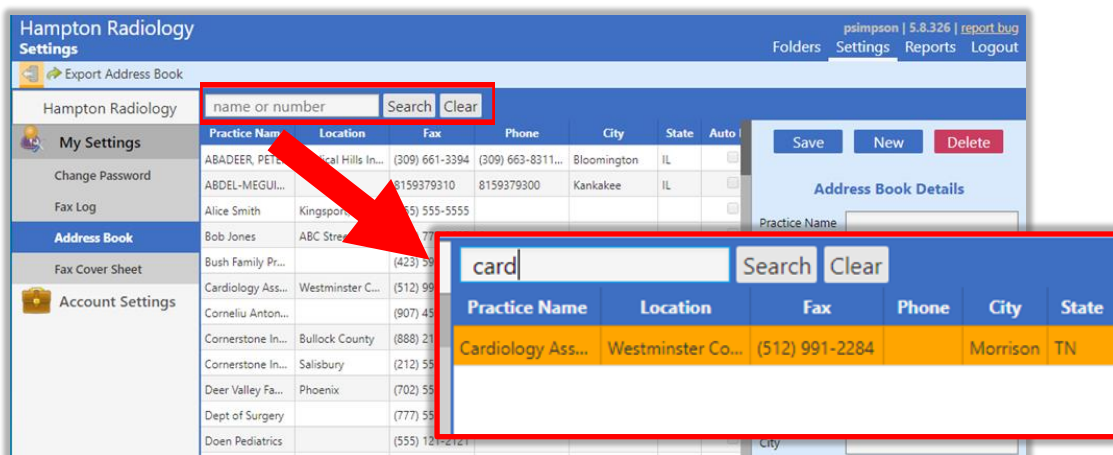
Notes related to address book entries:

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

### Searching an entry

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





Hampton Radiology Settings

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Folders Settings Reports Logout

Export Address Book

Hampton Radiology

name or number Search Clear

My Settings

Change Password

Fax Log

Address Book

Fax Cover Sheet

Account Settings

Practice Name	Location	Fax	Phone	City	State	Auto
ABADEER, PETE	Medical Hills In...	(309) 661-3394	(309) 663-8311...	Bloomington	IL	<input type="checkbox"/>
ABDEL-MEGUI...		8159379310	8159379300	Kankakee	IL	<input type="checkbox"/>
Alice Smith	Kingsport	(555) 555-5555				<input type="checkbox"/>
Bob Jones	ABC Stre...					<input type="checkbox"/>
Bush Family Pr...		(423) 55...				<input type="checkbox"/>
Cardiology Ass...	Westminster Co...	(512) 991-2284		Morrison	TN	<input type="checkbox"/>
Cornelius Anton...		(907) 45...				<input type="checkbox"/>
Cornerstone In...	Bullock County	(888) 21...				<input type="checkbox"/>
Cornerstone In...	Salisbury	(212) 55...				<input type="checkbox"/>
Deer Valley Fa...	Phoenix	(702) 55...				<input type="checkbox"/>
Dept of Surgery		(777) 55...				<input type="checkbox"/>
Doen Pediatrics		(555) 123-21...				<input type="checkbox"/>

Save New Delete

Address Book Details

Practice Name

card Search Clear

Practice Name	Location	Fax	Phone	City	State
Cardiology Ass...	Westminster Co...	(512) 991-2284		Morrison	TN

### Auto-fax Setup

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

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

1. Select the entry in the Address Book that will receive the auto-fax setting by clicking the row in the Address Book entry pane.
2. Checks the "Auto Fax" checkbox at the bottom of the Address Book Details Panel.
3. Select the desired auto-fax trigger from the dropdown in the "Auto-fax Trigger" box. Auto-fax Trigger options are:

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[Folders](#) [Settings](#) [Reports](#) [Logout](#)

[Export Address Book](#)

Hampton Radiology

Practice Name	Location	Fax	Phone	City	State	Auto
ABADEER, PETE...	Medical Hills In...	(309) 661-3394	(309) 663-8311...	Bloomington	IL	<input type="checkbox"/>
ABDEL-MEGUI...		8159379310	8159379300	Kankakee	IL	<input type="checkbox"/>
Alice Smith	Kingsport, TN	(555) 555-5555				<input type="checkbox"/>
Bob Jones	ABC Street	(777) 777-3687	0 -			<input type="checkbox"/>
Bush Family Pr...		(423) 595-6254	423-971-6323	Bristol	TN	<input type="checkbox"/>
Cardiology Ass...	Westminster C...	(512) 991-2284		Morrison	TN	<input type="checkbox"/>
Cornellu Anton...		(907) 459-3555	(907) 459-3520	Fairbanks	AK	<input checked="" type="checkbox"/>
Cornerstone In...	Bullock County	(888) 215-4471		Macon	GA	<input type="checkbox"/>
Cornerstone In...	Salisbury	(212) 555-1212		Macon	MS	<input type="checkbox"/>
Deer Valley Fa...	Phoenix	(702) 555-1212	(602) 942-0648	Phoenix	AZ	<input type="checkbox"/>
Dept of Surgery		(777) 555-1212				<input type="checkbox"/>
Doen Pediatrics		(555) 121-2121				<input type="checkbox"/>
dr jones		0 -	0 - Ext.			<input type="checkbox"/>
Dr, Linda Finch		0 -	0 - Ext.			<input type="checkbox"/>
Dr. Alan Stone		(246) 583-8484	0 - Ext.			<input type="checkbox"/>
Dr. Alan Wilson		(786) 887-3331	0 -	Kingsport	TN	<input checked="" type="checkbox"/>
Dr. Alan Wilson		(786) 887-3331	0 -	Kingsport	TN	<input checked="" type="checkbox"/>
Johns...						<input type="checkbox"/>

**Address Book Details**

Practice Name

Location

Fax

Phone

Address 1

Address 2

Address 3

Address 4

City

State

Zip

Auto Fax ☐

Autofax Trigger

**Autofax Trigger Options:**

- (None Selected)
- (None Selected)
- Immediately
- Sent to Inbox
- Finalized
- eSigned

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

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

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

### Columns

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

logy

Book

ogy

Search

Clear

Practice Name	Location	Fax	Phone	City	State	Auto Fax	Trigger
Dr. Alice Reen		(555) 555-5555	555-555-5555	Johnson City	NY	<input type="checkbox"/>	eSigned
Dr. Andrew Phillippe		0 -	0 - Ext.			<input type="checkbox"/>	eSigned
DR. BHASIN		(708) 799-2411	(708) 799-3044	HAZELCREST	IL	<input type="checkbox"/>	
DR. BHOOPAL		(708) 388-4933	(708) 388-4911	PAOLS HEIGHTS	IL	<input type="checkbox"/>	
Dr. David Andrews		0 -	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. David Harris		(575) 837-5467	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. David Smelzer		(346) 546-4768	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. Frank DeMollo		(888) 215-4471				<input type="checkbox"/>	
Dr. Haines		0 -	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. Herald Jones		0 -	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. Janice Bays		(476) 327-5603	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. Jay Goodpasture		0 -	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. Jenny Lawrence		8882154471	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. John Smith		(555) 555-6392				<input checked="" type="checkbox"/>	Finalized
Dr. John Smith		(555) 555-0345				<input checked="" type="checkbox"/>	Sent to Inbox
Dr. John Smith MD		(555) 555-5555	0 - Ext.			<input type="checkbox"/>	eSigned
Dr. John Smithson		(555) 555-5555				<input type="checkbox"/>	(None Selected)
Dr. John Taylor		(987) 098-7580	0 - Ext.			<input type="checkbox"/>	eSigned

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

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

**Fax:** This column displays the fax number.

**Phone:** This column displays the phone number.

**City:** This column displays the City.

**State:** This column displays the State.

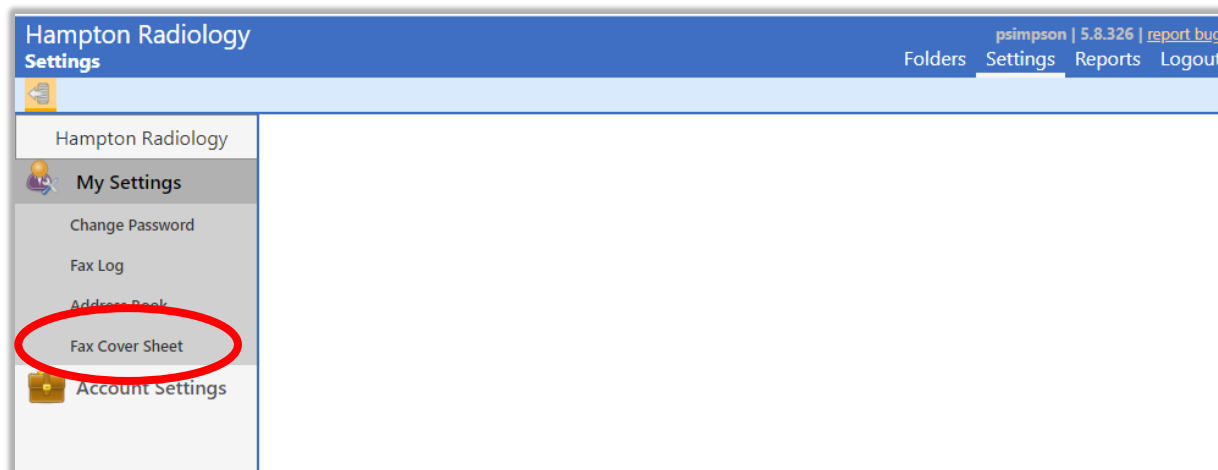
**Auto Fax:** This checkbox displays a check if the auto-fax feature has been enabled for the Address Book entry.

**Trigger:** This column displays the trigger selected in the "Autofax Trigger".

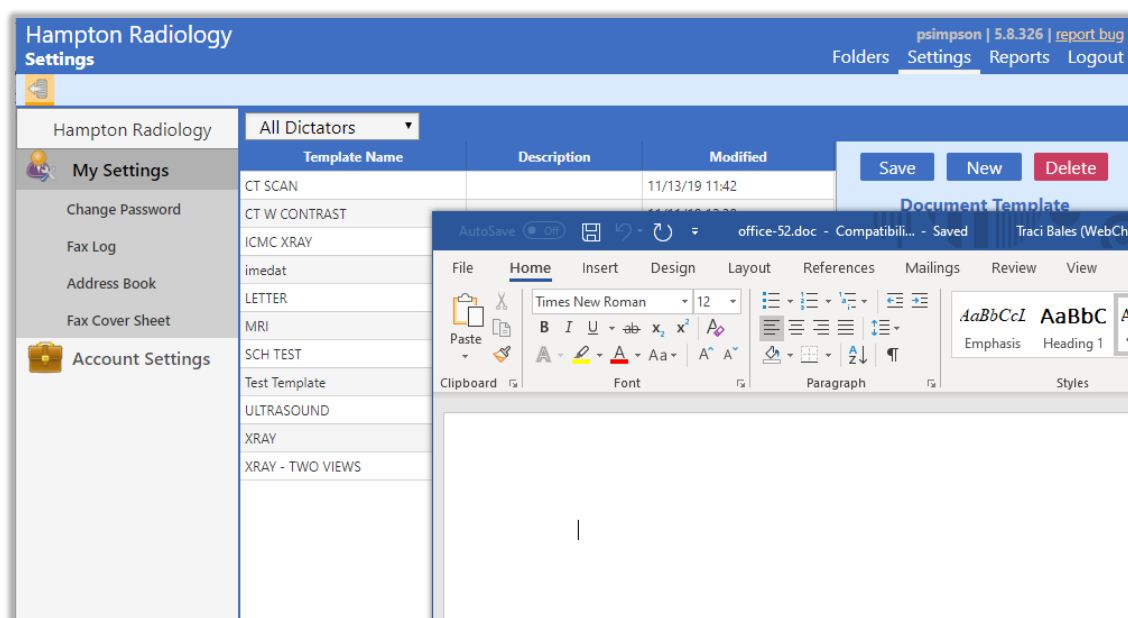
## Fax Cover Sheet

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

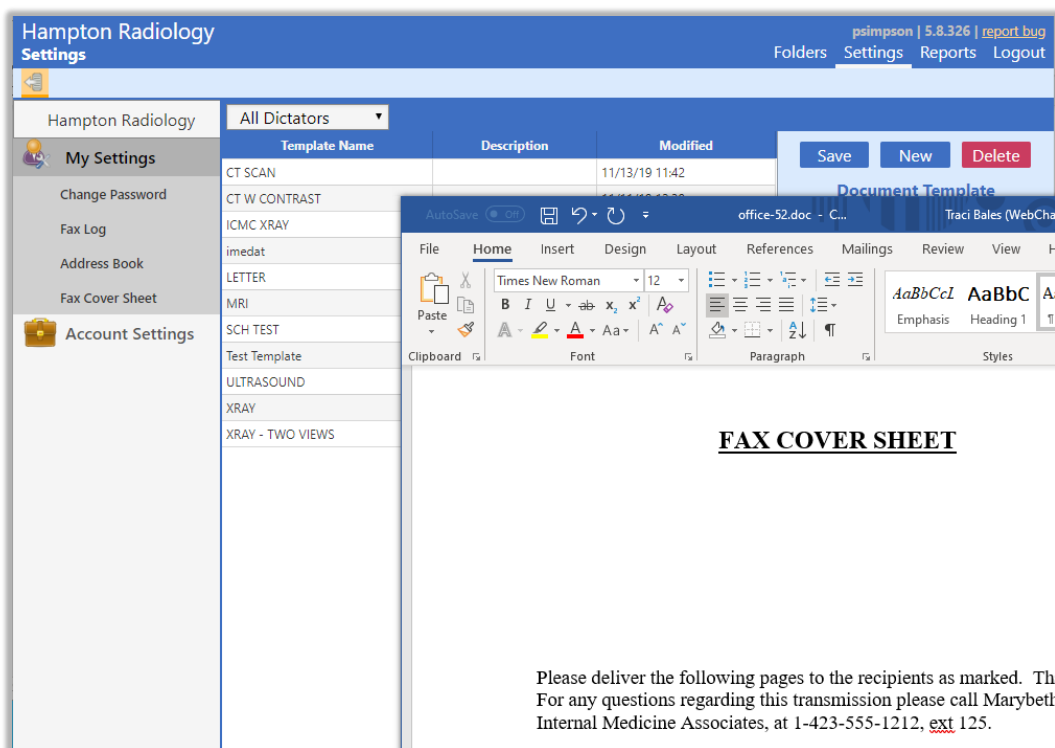
To customize the fax cover sheet:



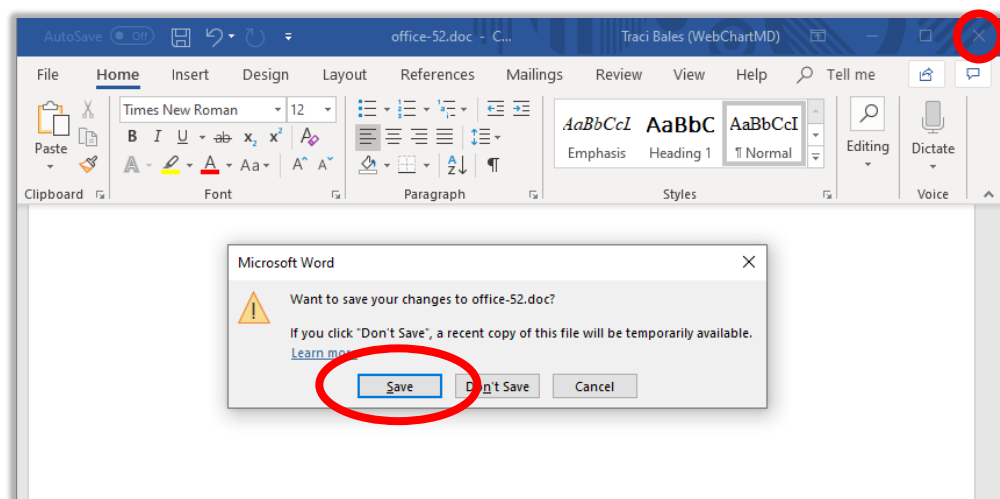
1. Click the “Fax Cover Sheet” link in the Folder Pane.



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



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



To modify an existing coversheet:

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

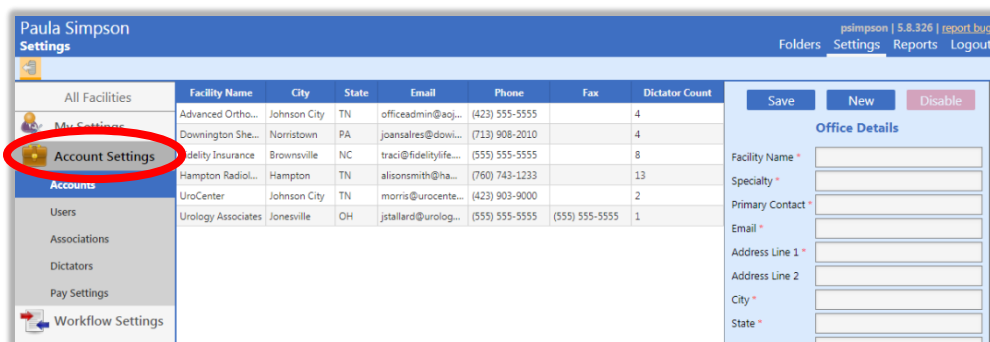
Once a cover sheet has been created, it will automatically fax with all outgoing faxes.

## Account Settings

The settings menu displayed under “Account Settings” changes based on whether “All Facilities” or a named Facility is selected in the dropdown. The “All Facilities” view displays settings areas specific to the Transcription Team, while selecting a named Facility displays settings that pertain to the named office.

The “Account Settings” section under the “All Facilities” dropdown contains functional areas related to the Transcription Team set-up and management, and to some specific areas of Facility set-up and management. This next section reviews each of those functional areas.

### All Facilities Functions



The screenshot displays the 'Account Settings' page for Paula Simpson. The sidebar on the left has 'Account Settings' highlighted. The main content area shows a table of facilities and a form for office details.

Facility Name	City	State	Email	Phone	Fax	Dictator Count
Advanced Ortho...	Johnson City	TN	officeadmin@aol...	(423) 555-5555		4
Downington She...	Norristown	PA	joansalres@dow...	(713) 908-2010		4
Fidelity Insurance	Brownsville	NC	traci@fidelityfe...	(555) 555-5555		8
Hampton Radiol...	Hampton	TN	alisonsmith@ha...	(760) 743-1233		13
UroCenter	Johnson City	TN	morris@urocente...	(423) 903-9000		2
Urology Associates	Jonesville	OH	jstallard@urolog...	(555) 555-5555	(555) 555-5555	1

Office Details

Facility Name \*

Specialty \*

Primary Contact \*

Email \*

Address Line 1 \*

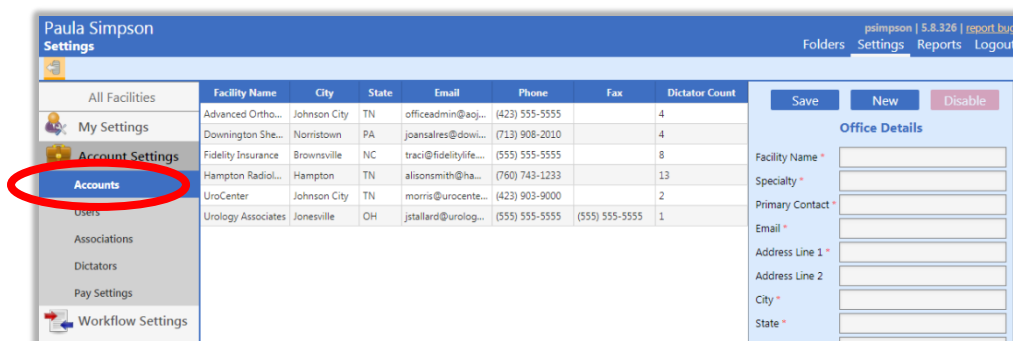
Address Line 2 \*

City \*

State \*

## Accounts

The “Accounts” functional area is where the Transcription Team can add new Accounts (Facilities) and modify the details related to those Accounts.



Facility Name	City	State	Email	Phone	Fax	Dictator Count
Advanced Ortho...	Johnson City	TN	officeadmin@acj...	(423) 555-5555		4
Downington She...	Norristown	PA	joansalres@dow...	(713) 908-2010		4
Fidelity Insurance	Brownsville	NC	traci@fidelitylife...	(555) 555-5555		8
Hampton Radiol...	Hampton	TN	alisonsmith@ha...	(760) 743-1233		13
UroCenter	Johnson City	TN	morris@urocente...	(423) 903-9000		2
Urology Associates	Jonesville	OH	jstallard@urolog...	(555) 555-5555	(555) 555-5555	1

Office Details

Facility Name \*

Specialty \*

Primary Contact \*

Email \*

Address Line 1 \*

Address Line 2

City \*

State \*

### Create an Account

To add a new Account:

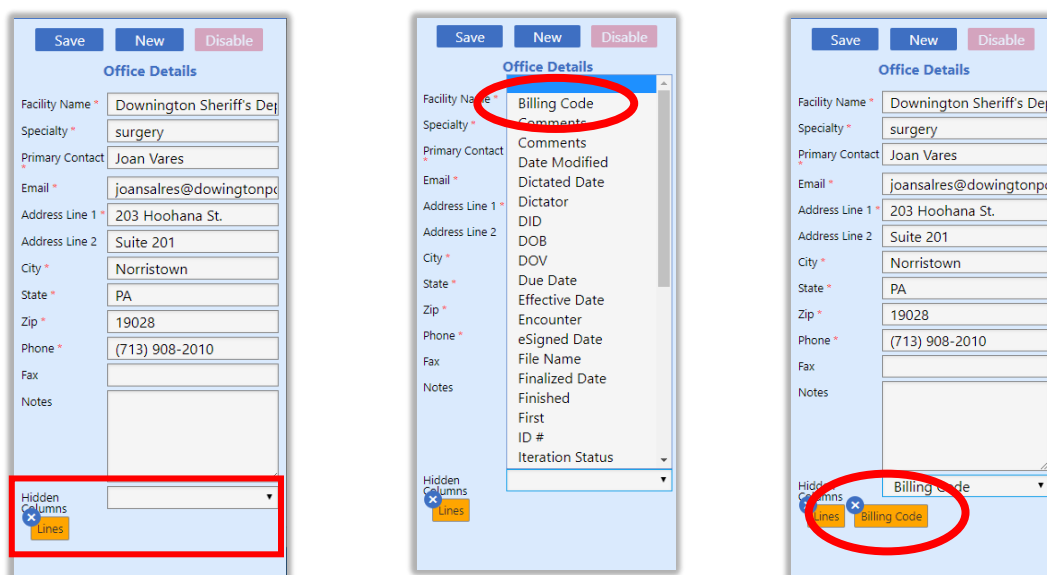
1. Click the “New” button in the “Office Details” panel.
2. Add requested details in the fields provided. Fields with a red asterisk are required.
3. Click the “Save” button when completed. Once saved, the new account will be listed in the main screen along with the other accounts for the MTSO.

Notes on fields:

1. Whatever text is entered into the Facility Name field is how the system will display the Facility name throughout WebChartMD (such as in the Facility dropdown). If the Facility name is normally written out in full form (Glasgow Arms ENT), then that; if an abbreviation is normally used (GAENT), enter the abbreviation.
2. “Specialty” refers to the type of practice of medicine at the Facility, such as “Neurology”, “Orthopedics”, etc.
3. “Primary Contact” is the name of the administrator at the Facility.
4. “Email” is the email address the Transcription Team wishes to use for the primary contact at the Facility. There are different ways to use this field, depending on the objectives of the Transcription Team.

**A Note on the use of the Email field:** When an Account is first created, the system will automatically send a “Welcome to WebChartMD” email to the email address entered in this field. As such, the Transcription Team may decide to enter the email address of a Transcription Team member instead of the Facility administrator until set-up of the account is completed and the Facility is ready to be trained. Once the account is created, the email address can be updated to the Facility administrator and the “Welcome to WebChartMD” email re-triggered.

5. **Notes:** The Notes is a free text field that can be used to keep information pertaining to the office creation or any other notes in general.
6. **Hidden Columns:** The “Hidden Columns” dropdown located at the bottom of the Office Details section allows the user to hide specific columns so that the Facility users cannot view them. This allows the Transcription Team to control what information is available to the Facility and what is hidden from them.



To hide a column, click the “Hidden Columns” dropdown and click the column name(s) to be hidden. Hidden columns selected appear as “tags” (small boxes) in gold at the bottom of the Details Panel. To un-hide a column, click the blue “x” in the top left edge of the tag

Columns available to be hidden are:

Billing Code: See page 35 for a full description of column management features.

Comments: See page 35 for a full description of column management features.

Date Modified: See page 35 for a full description of column management features.

Dictated Date: See page 35 for a full description of column management features.



Dictator: See page 35 for a full description of column management features.

DID: See page 35 for a full description of column management features.

DOB: See page 35 for a full description of column management features.

DOV: See page 35 for a full description of column management features.

Due Date: This column does not exist.

Effective Date: See page 35 for a full description of column management features

Encounter: See page 35 for a full description of column management features.

eSigned Date: See page 35 for a full description of column management features.

File Name: See page 35 for a full description of column management features.

Finished: See page 35 for a full description of column management features.

First: See page 35 for a full description of column management features.

ID #: See page 35 for a full description of column management features.

Job #: See page 35 for a full description of column management features.

Last: See page 35 for a full description of column management features.

Last Modified: See page 35 for a full description of column management features.

Length: See page 35 for a full description of column management features.

Lines: See page 35 for a full description of column management features.

Note: This selection will hide both bill and pay lines from the facility's view.

Location: See page 35 for a full description of column management features.

On Time: See page 35 for a full description of column management features.

Pool: See page 35 for a full description of column management features.

Rejection Reason: See page 35 for a full description of column management features.

Report Details: See page 35 for a full description of column management features.

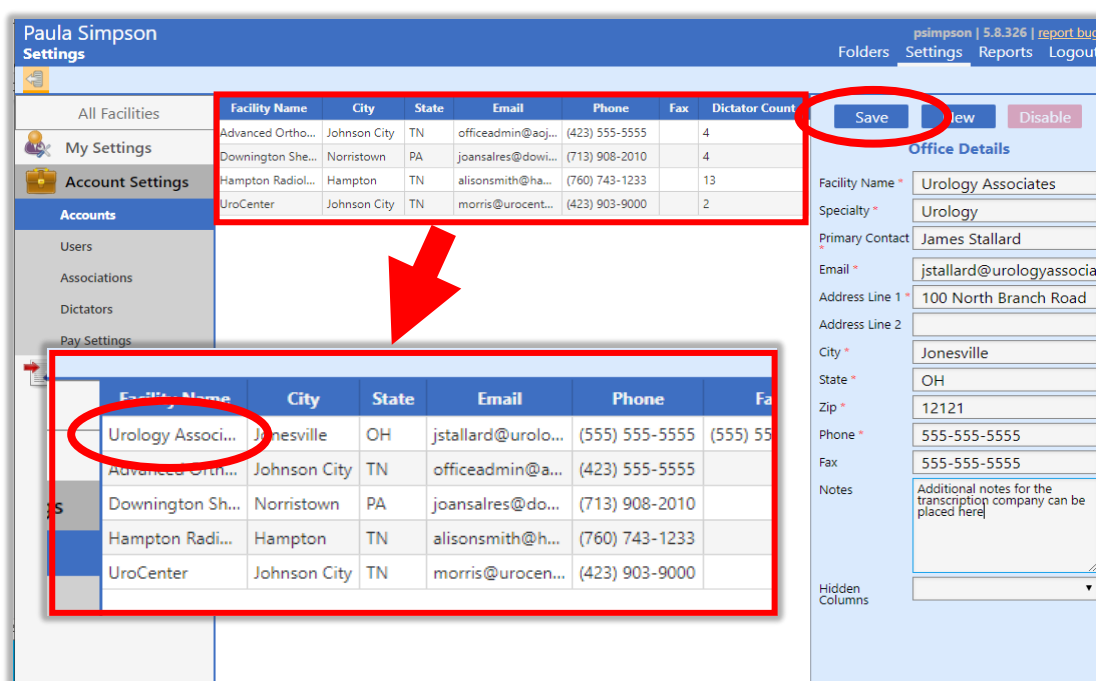
Report Type: See page 35 for a full description of column management features.

Routed: See page 35 for a full description of column management features.

Status: See page 35 for a full description of column management features.

TAT: See page 35 for a full description of column management features.

Uploaded Date: See page 35 for a full description of column management features.



The screenshot shows the 'Paula Simpson Settings' page. On the left is a sidebar with 'All Facilities', 'My Settings', 'Account Settings', 'Accounts', 'Users', 'Associations', 'Dictators', and 'Pay Settings'. The main area displays a table of facilities. A red box highlights the 'Save' button in the top right of this table. A red arrow points from the 'Save' button to the 'Office Details' panel on the right, which is also highlighted with a red box. The 'Office Details' panel shows information for 'Urology Associates'.

Facility Name	City	State	Email	Phone	Fax	Dictator Count
Advanced Ortho...	Johnson City	TN	officeadmin@aoj...	(423) 555-5555		4
Downington She...	Norristown	PA	joansalres@dow...	(713) 908-2010		4
Hampton Radiol...	Hampton	TN	alisonsmith@ha...	(760) 743-1233		13
UroCenter	Johnson City	TN	morris@urocent...	(423) 903-9000		2

**Office Details**

Facility Name \* Urology Associates

Specialty \* Urology

Primary Contact James Stallard

Email \* jstallard@urologyassocia

Address Line 1 \* 100 North Branch Road

Address Line 2

City \* Jonesville

State \* OH

Zip \* 12121

Phone \* 555-555-5555

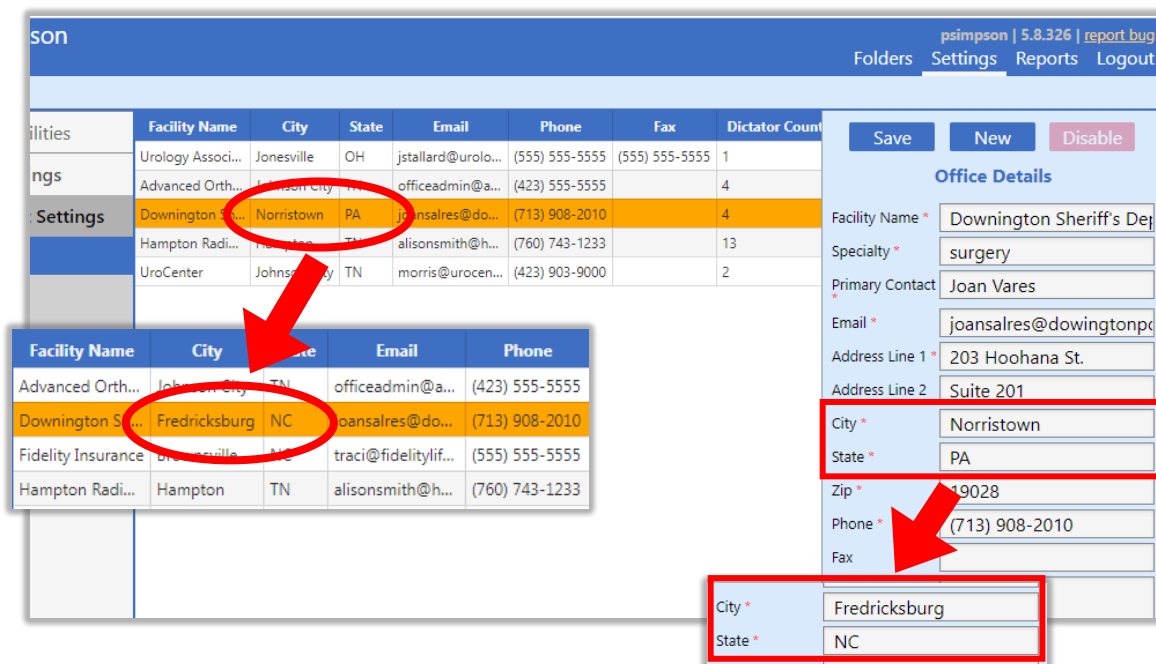
Fax 555-555-5555

Notes Additional notes for the transcription company can be placed here

Hidden Columns

### Edit an Account

To edit a specific account's details, click on the row of the account in the Details Panel. The row highlights and the account's details populate in the "Office Details" panel to the right.



The screenshot shows the WebChartMD interface with a 'Facilities' table and an 'Office Details' form. The 'Facilities' table has columns: Facility Name, City, State, Email, Phone, Fax, and Dictator Count. The 'Office Details' form has fields for Facility Name, Specialty, Primary Contact, Email, Address Line 1, Address Line 2, City, State, Zip, Phone, and Fax. A red circle highlights the 'Downington Sheriff's Dept' entry in the table, and a red arrow points to its details in the form. Another red circle highlights the 'Fredricksburg, NC' entry in a separate table, and a red arrow points to its details in a separate form.

Facility Name	City	State	Email	Phone	Fax	Dictator Count
Urology Associ...	Jonesville	OH	jstallard@urolo...	(555) 555-5555	(555) 555-5555	1
Advanced Orth...	Johnson City	NC	officeadmin@a...	(423) 555-5555		4
Downington S...	Norristown	PA	joansalres@do...	(713) 908-2010		4
Hampton Radi...	Hampton	TN	alisonsmith@h...	(760) 743-1233		13
UroCenter	Johnson City	TN	morris@urocen...	(423) 903-9000		2

Facility Name	City	State	Email	Phone
Advanced Orth...	Johnson City	TN	officeadmin@a...	(423) 555-5555
Downington S...	Fredricksburg	NC	joansalres@do...	(713) 908-2010
Fidelity Insur...	Johnsonville	NC	traci@fidelitylif...	(555) 555-5555
Hampton Radi...	Hampton	TN	alisonsmith@h...	(760) 743-1233

Once the details are populated in the Office Details fields, edit the details as needed, and click the “Save” button at the top of the “Office Details” window to save the changes.

### Disable an Account

The “Disable” button in the Office Details panel is currently not an available feature. Please contact the WebChartMD helpdesk to remove inactive accounts from the Account list.

### Master User Profiles

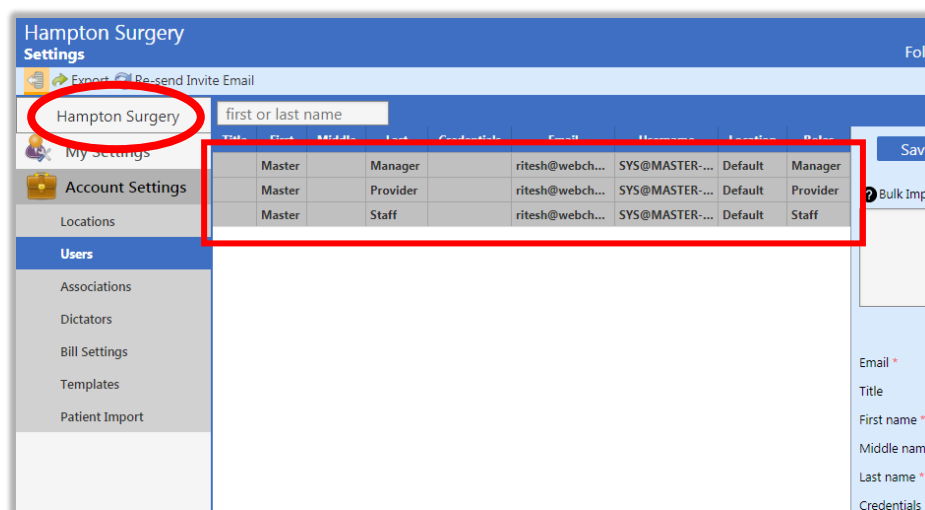
Adding a new Facility account automatically creates Master User profiles for the Facility. The Master User profiles act as templates for the three respective user roles available to the Facility.

When new users are added to the system, they “inherit” the Roles and Permissions assigned to the Master User profile. If set, they also inherit the line settings, routing settings and templates assigned to the Master User profile.

The system pre-assigns a set of recommended permissions based on settings used by a broad base of WebChartMD users. Those pre-assigned permissions can be customized to your and your client’s needs.

For example, setting up the Master Provider (another term for Dictator) profile with a specific routing setting (such as routing all dictations to a particular Transcriptionist or pool) gets inherited by all other Dictators added to the Facility.

The Master User profiles can be accessed in the Users section by changing the dropdown in the top left from “All Facilities” to the Named Facility view. In the Users section, the Master User profiles are highlighted in dark grey background (below).



There are three Master User profiles:

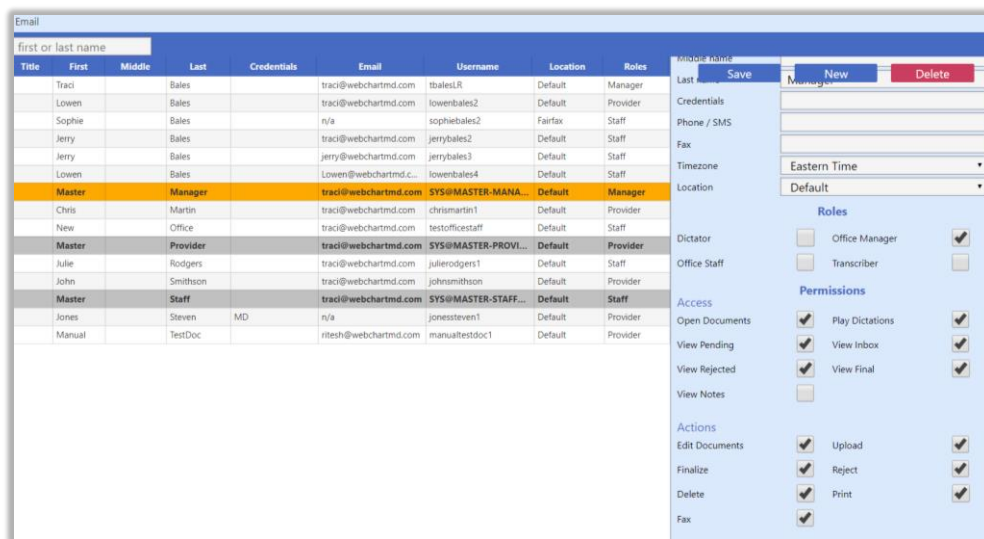
- **Master Manager:** The Master Manager settings get copied to all users created with the Manager role permission provided to them.
- **Master Provider:** The Master Provider is another term for the Dictators. Master Provider settings get copied to all users created with the Provider role permission provided to them.
- **Master Staff:** The Master Staff settings get copied to all users created with the Staff role permission provided to them.

### Changing Master User Profiles

To change pre-assigned permissions:

1. Click the Master User row that needs to be modified. The pre-assigned Permissions will appear in the Details Panel.

2. Check and/or uncheck the desired permissions to be added or removed.



3. Press “Save” to accept changes. Any new user added to the system with that Role will inherit the new Master User permissions.

Please Note: Changes made to Master User profile does not change the permissions of users already added to the system.

## Master User Settings

### Master Manager

Master Manager settings that are pre-set include:

- User Settings menu: Permissions for both Actions and Access.
- Associations menu: Associations to all or any specific set of Dictators.

### Master Provider

Master Provider settings that are pre-set include:

- User Settings menu: Permissions for both Actions and Access.

- Associations menu: Dictators are usually only associated with themselves but if the Master Provider profile is associated with a specific set of users, the Dictators added thereafter inherit those associations.

Master Provider settings that need to be set in order to be inherited by Dictators are:

- Routing: Create the desired workflow routing for Dictators. This can be set in one of two screens:
  - In the Dictators screen, use the Routing Settings to set either a Transcriptionist or Pool.
  - In the Workflow Rules screen, create customized routing logic for the Dictator.
- On Time: Set the On Time Setting via the Dictators screen.

Bill Settings: Set the various Rate and Line Settings via the Bill Settings screen. Please note: In the Rate Settings, only the Metric is replicated, the rate cost does not get replicated.

Please note:

1. Dictators Menu: Dictation Settings, Fax and Interface Settings are not replicated as these need to be unique per Dictator.
2. Bill Rate menu: the Rate of Bill Pay Rate Settings does not get replicated.
3. Templates: Any templates uploaded for the individual Dictator are not replicated. Any templates uploaded for "All Dictators" are available by default to all Dictators at the Facility.

#### Master Staff

- Master Staff settings that are pre-set include: User Settings menu: Permissions for both Actions and Access.
- Associations menu: Associations to all or any specific set of Dictators.

For more details on Users please see page 131.

For more details on Associations please see page 149.

For more details on Dictators please see page 154.

For more details on Bill Settings please see page 190.

For more details on Templates please see page 191.

For more details on Routing please see page 99.

## Users

The “Users” section under the “All Facilities” dropdown is used to add and manage Transcription Team users, such as Transcriptionists, QA editors, and other user types which are explained later in this section.

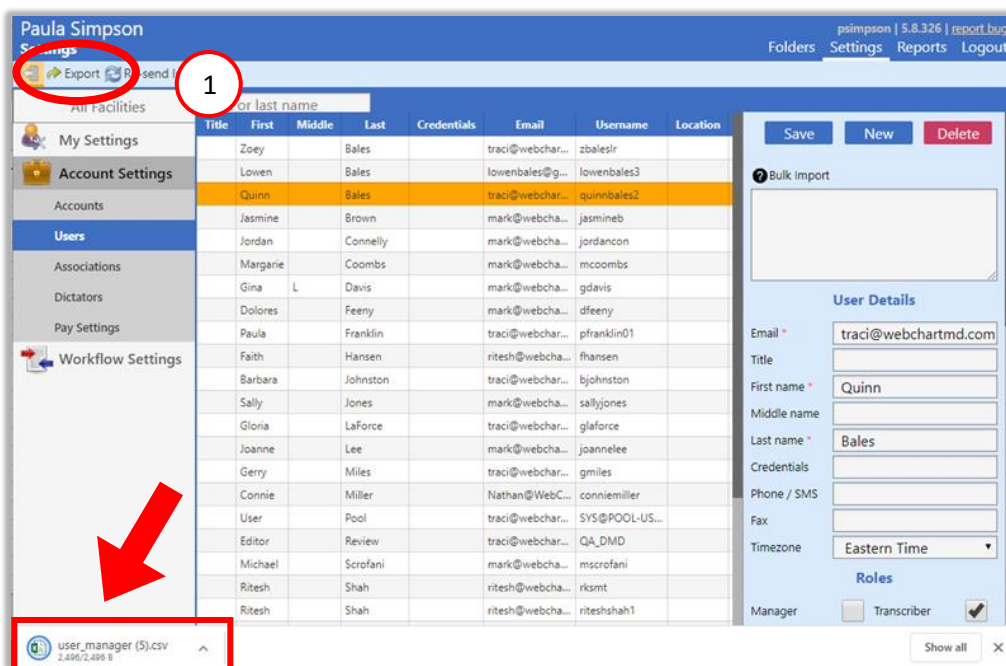
### Folder Management Functions

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

- Export
- Re-send Invite Email

#### 1 Export

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

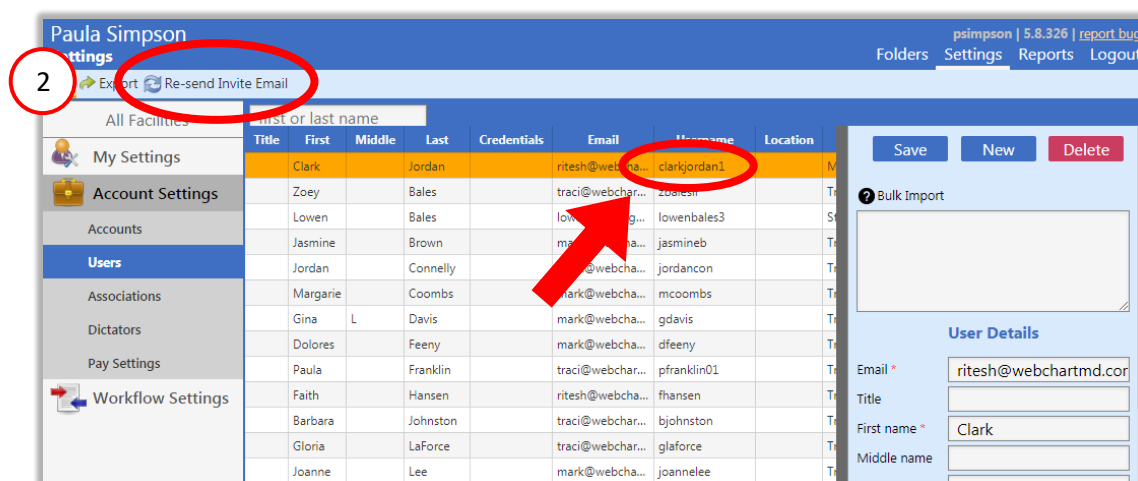


2

## Re-send Invite Email

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

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



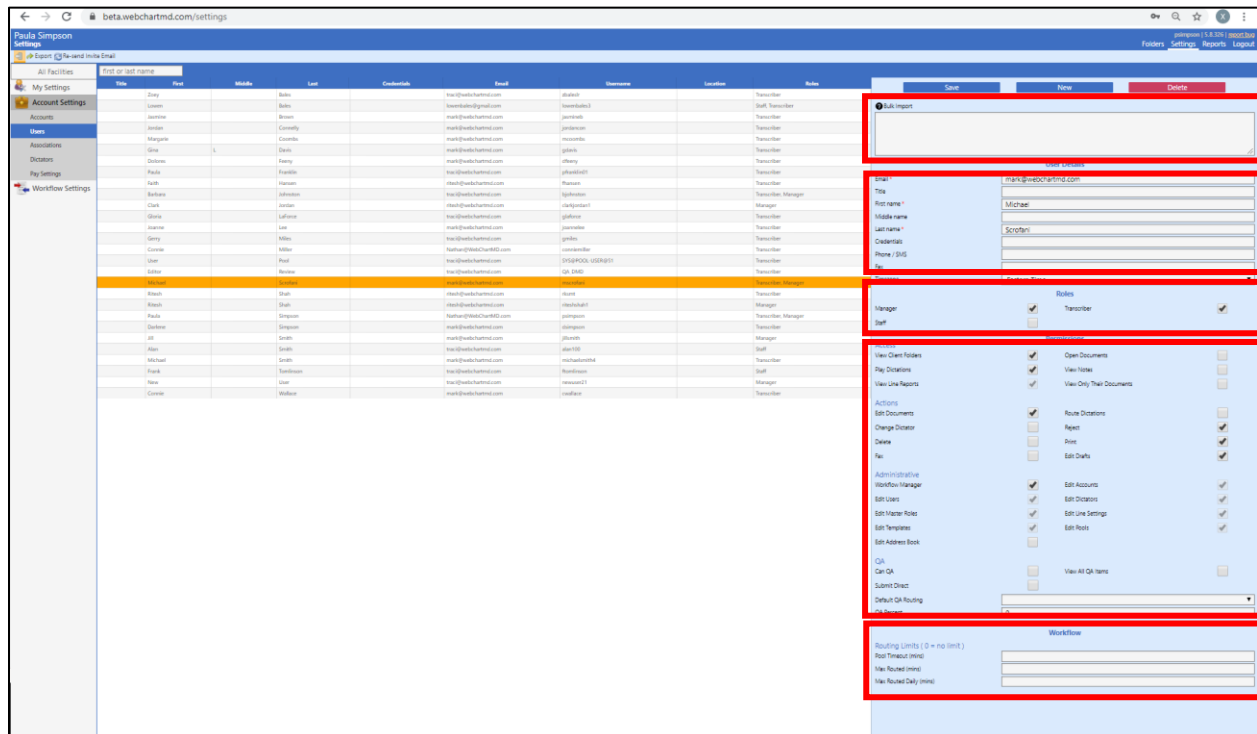
Notes on Re-send Invite Email feature:

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



## The User Details Panel

The “User Details” panel has five sections:



The screenshot shows the 'User Details' panel for a user named 'Paula Simpson'. The panel is divided into five sections, each highlighted with a red box and a numbered callout:

- 1 Bulk Import:** A section for importing new users from an Excel or .csv formatted spreadsheet.
- 2 User Details:** A section containing identifiers related to the user, such as Title, First name, Middle name, Last name, Credentials, and Phone / SMS.
- 3 Roles:** A section for defining the user's role, showing a list of roles and their associated permissions.
- 4 Permissions:** A section defining the permissions assigned to the user, organized into four subsections: Access, Actions, Administrative, and QA.
- 5 Workflow:** A section containing settings that determine the file routing maximums if the user has a “Transcriptionist” role.

- 1 Bulk Import:** This feature allows the bulk import of new users from an Excel or .csv formatted spreadsheet.
- 2 User Details:** contains identifiers related to the user.
- 3 Roles:** provides the definition of the user’s role.
- 4 Permissions:** defines the permissions assigned to the user. This section is comprised of four subsections: Access, Actions, Administrative and QA, which will be defined later in this section.
- 5 Workflow:** contains settings that determine the file routing maximums if the user has a “Transcriptionist” role.

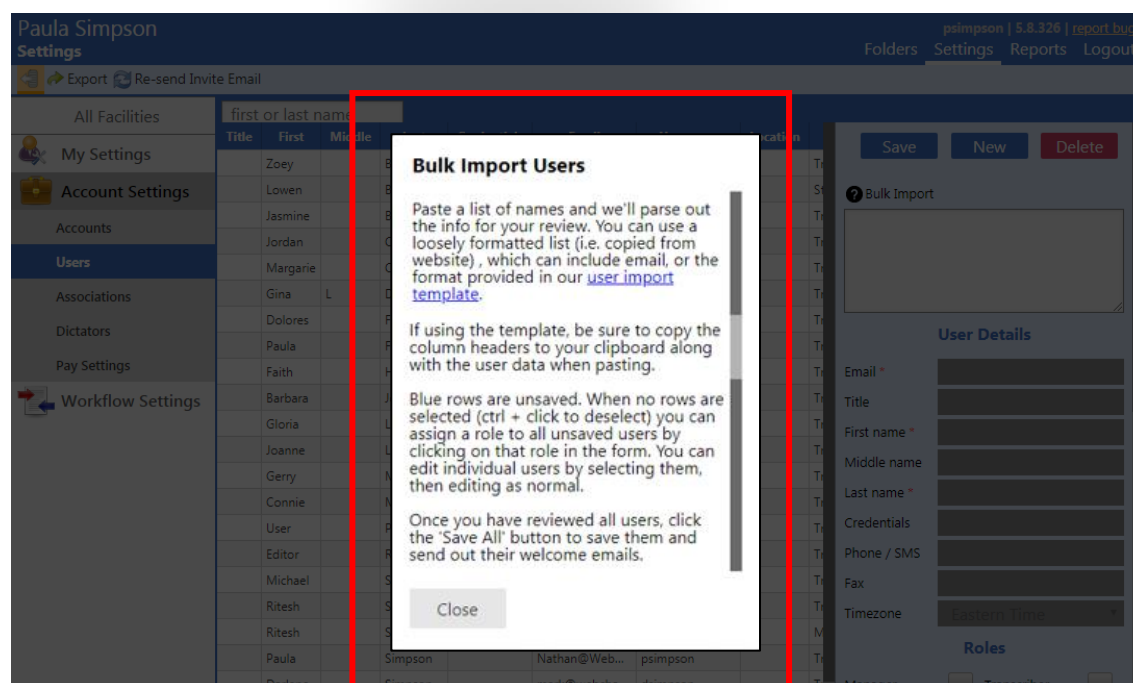
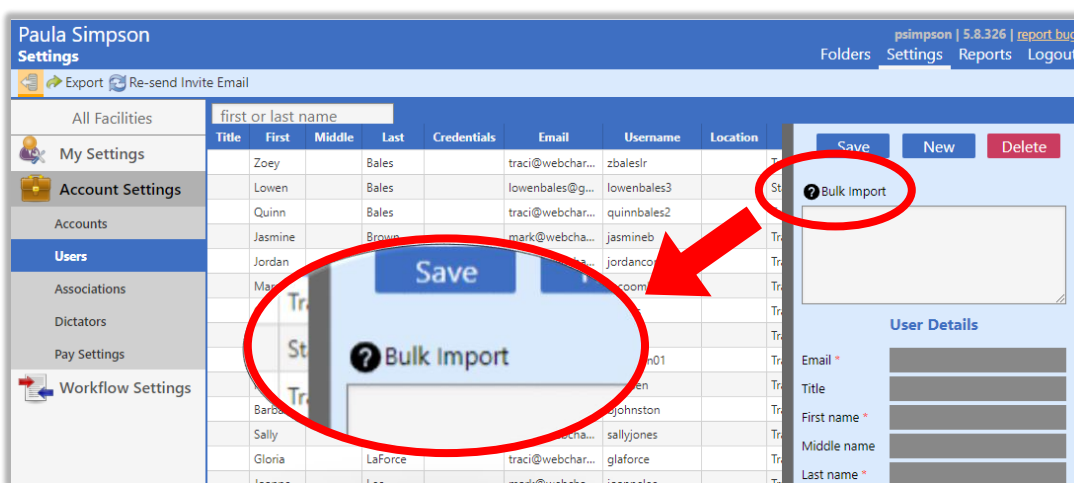
## Bulk Import

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

To use the “Bulk Import” feature:

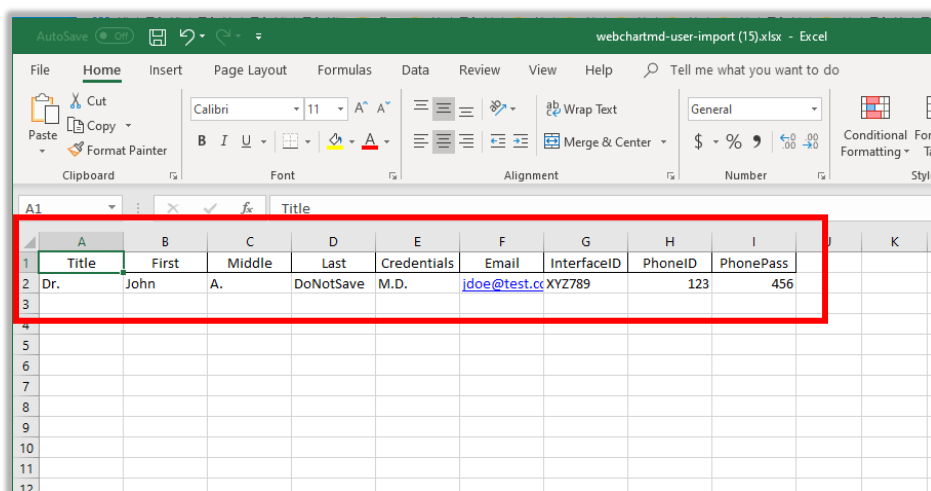
### Step 1

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



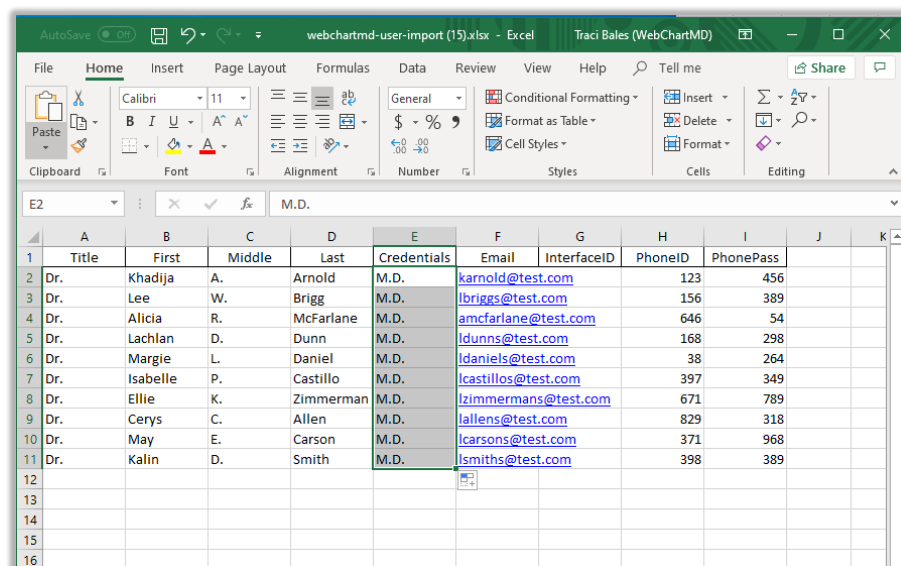
To download the template sample with available columns, click the “user import template” link (above).

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



	A	B	C	D	E	F	G	H	I	J	K
1	Title	First	Middle	Last	Credentials	Email	InterfaceID	PhoneID	PhonePass		
2	Dr.	John	A.	DoNotSave	M.D.	jdoe@test.co	XYZ789	123	456		
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											

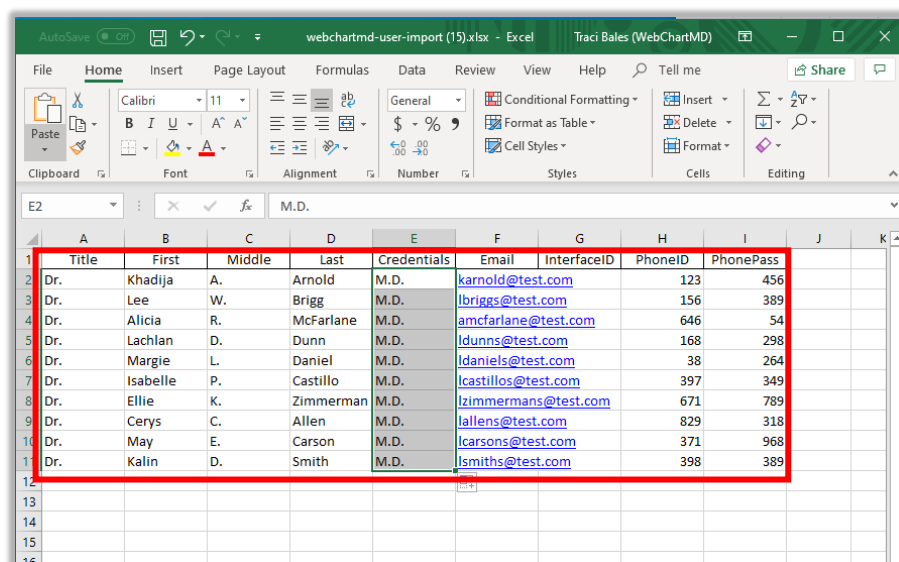
An example of a properly formatted bulk import excel sheet appears below:



	A	B	C	D	E	F	G	H	I	J	K
1	Title	First	Middle	Last	Credentials	Email	InterfaceID	PhoneID	PhonePass		
2	Dr.	Khadija	A.	Arnold	M.D.	karnold@test.com		123	456		
3	Dr.	Lee	W.	Brigg	M.D.	lbriggs@test.com		156	389		
4	Dr.	Alicia	R.	McFarlane	M.D.	amcfarlane@test.com		646	54		
5	Dr.	Lachlan	D.	Dunn	M.D.	ldunns@test.com		168	298		
6	Dr.	Margie	L.	Daniel	M.D.	ldaniels@test.com		38	264		
7	Dr.	Isabelle	P.	Castillo	M.D.	lcastillos@test.com		397	349		
8	Dr.	Ellie	K.	Zimmerman	M.D.	lzimmermans@test.com		671	789		
9	Dr.	Cerys	C.	Allen	M.D.	lallens@test.com		829	318		
10	Dr.	May	E.	Carson	M.D.	lcarsons@test.com		371	968		
11	Dr.	Kalin	D.	Smith	M.D.	lsmiths@test.com		398	389		
12											
13											
14											
15											
16											

## Step 2

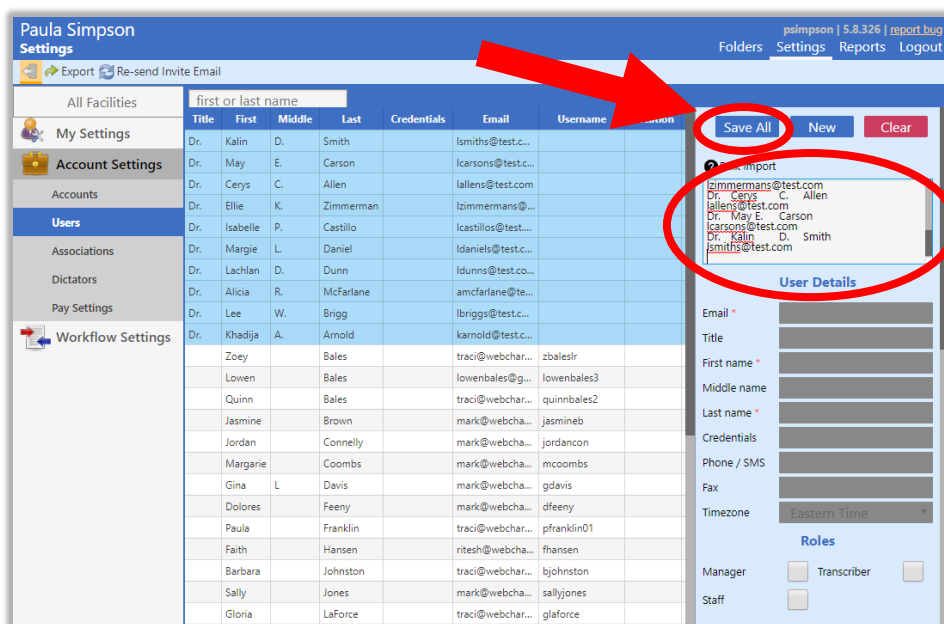
Copy the columns and column headers from your (important) to your Microsoft Excel clipboard. Make sure to select and copy only those rows and columns that hold data required to be imported.



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

### Step 3

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



Paula Simpson | 5.8.326 | report bug

Settings | Folders | Settings | Reports | Logout

Export | Re-send Invite Email

All Facilities | first or last name

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Title	First	Middle	Last	Credentials	Email	Username	Role
Dr.	Kalin	D.	Smith		lsmiths@test.com		
Dr.	May	E.	Carson		lcarsons@test.com		
Dr.	Cerys	C.	Allen		lallens@test.com		
Dr.	Ellie	K.	Zimmerman		lzimmermans@test.com		
Dr.	Isabelle	P.	Castillo		lcastillos@test.com		
Dr.	Margie	L.	Daniel		ldaniels@test.com		
Dr.	Lachlan	D.	Dunn		ldunns@test.com		
Dr.	Alicia	R.	McFarlane		amcfarlane@te...		
Dr.	Lee	W.	Brigg		lbriggs@test.c...		
Dr.	Khadija	A.	Arnold		karnold@test.c...		
	Zoe		Bales		traci@webchar...	zbaleslr	
	Lowen		Bales		traci@webchar...	lowenbales3	
	Quinn		Bales		traci@webchar...	quinnbales2	
	Jasmine		Brown		mark@webcha...	jasmineb	
	Jordan		Connelly		mark@webcha...	jordancon	
	Margarie		Coombs		mark@webcha...	mcoombs	
	Gina	L	Davis		mark@webcha...	gdavis	
	Dolores		Feeny		mark@webcha...	dfeeny	
	Paula		Franklin		traci@webchar...	pfranklin01	
	Faith		Hansen		ritesh@webcha...	fhansen	
	Barbara		Johnston		traci@webchar...	bjohnston	
	Sally		Jones		mark@webcha...	sallyjones	
	Gloria		LaForce		traci@webchar...	glaforce	

Bulk Import

lzimmermans@test.com  
Dr. Cerys C. Allen  
lallens@test.com  
Dr. May E. Carson  
lcarsons@test.com  
Dr. Kalin D. Smith  
lsmiths@test.com

User Details

Email \*

Title

First name \*

Middle name

Last name \*

Credentials

Phone / SMS

Fax

Timezone Eastern Time

Roles

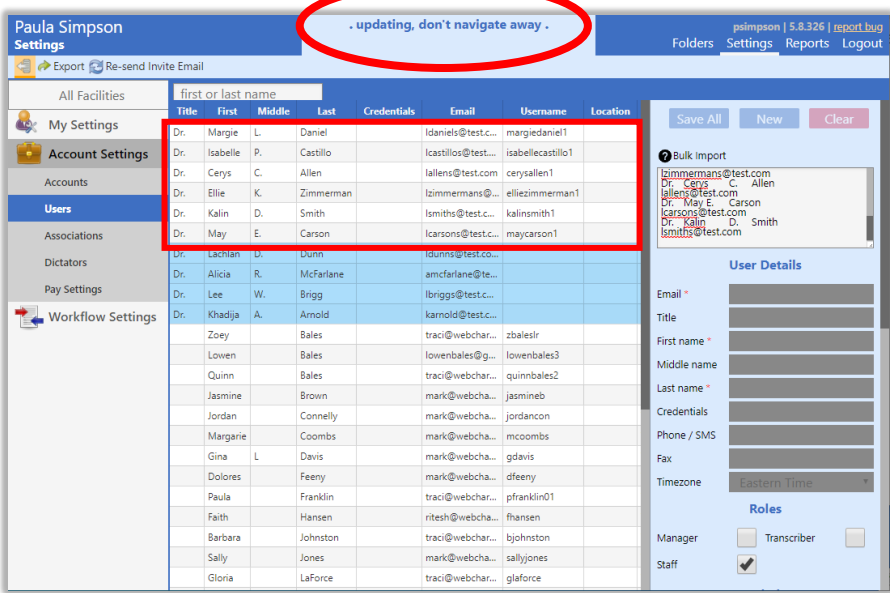
Manager ☐ Transcriber ☐

Staff ☐

Save All New Clear

## Step 4

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



Paula Simpson  
Settings

. updating, don't navigate away .

psimpson | 5.8.326 | report bug  
Folders Settings Reports Logout

Export Re-send Invite Email

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Title	First	Middle	Last	Credentials	Email	Username	Location
Dr.	Margie	L.	Daniel		ldaniels@test.c...	margiedaniel1	
Dr.	Isabelle	P.	Castillo		lcastillos@test...	isabellecastillo1	
Dr.	Cerys	C.	Allen		lallens@test.com	cerysallen1	
Dr.	Ellie	K.	Zimmerman		lzimmermans@...	elliezimmerman1	
Dr.	Kalin	D.	Smith		lsmiths@test.c...	kalinsmith1	
Dr.	May	E.	Carson		lcarsons@test.c...	maycarson1	
Dr.	Lachlan	D.	Dunn		ldunn@test.co...		
Dr.	Alicia	R.	McFarlane		amcfarlane@te...		
Dr.	Lee	W.	Brigg		lbriggs@test.c...		
Dr.	Khadja	A.	Arnold		karnold@test.c...		
	Zoe		Bales		traci@webchar...	zbaleslr	
	Lowen		Bales		lowenbales@g...	lowenbales3	
	Quinn		Bales		traci@webchar...	quinnbales2	
	Jasmine		Brown		mark@webcha...	jasmineb	
	Jordan		Connelly		mark@webcha...	jordancon	
	Margarie		Coombs		mark@webcha...	mcoombs	
	Gina	L.	Davis		mark@webcha...	gdavis	
	Dolores		Feeny		mark@webcha...	dfeeny	
	Paula		Franklin		traci@webchar...	pfrankin01	
	Faith		Hansen		ritesh@webcha...	fhansen	
	Barbara		Johnston		traci@webchar...	bjohnston	
	Sally		Jones		mark@webcha...	sallyjones	
	Gloria		LaForce		traci@webchar...	glaforce	

Bulk Import

lzimmermans@test.com  
Dr. Cerys C. Allen  
lallens@test.com  
Dr. May E. Carson  
lcarsons@test.com  
Dr. Kalin D. Smith  
lsmiths@test.com

User Details

Email \*

Title

First name \*

Middle name

Last name \*

Credentials

Phone / SMS

Fax

Timezone

Roles

Manager ☐ Transcriber ☐

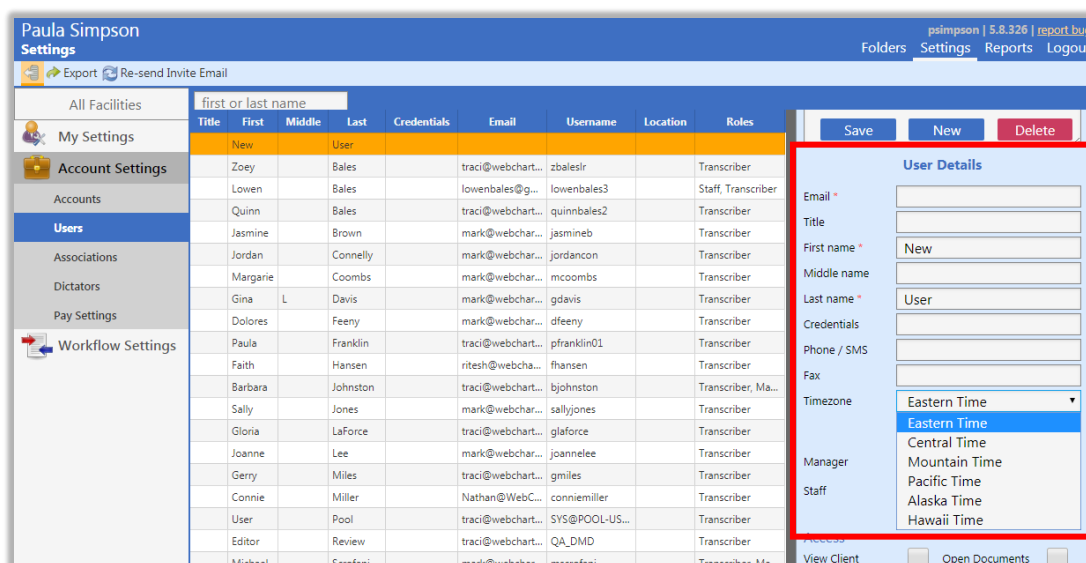
Staff ☒

## Notes on Bulk Import:

1. Data will load into the database exactly as it is formatted on the excel sheet that is used for the bulk import. For example, if physician names are in “all caps” on the excel sheet, they will appear in “all caps” within WebChartMD and on any document that are processed through WebChartMD.
2. The order of the columns on the spreadsheet used to import data do not need to match those of the “user import template” sample provided. However, column names must match those provided in the “user import template”.

## User Details

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



Title	First	Middle	Last	Credentials	Email	Username	Location	Roles
New			User					
	Zoey		Bales		traci@webchart...	zbaleslr		Transcriber
	Lowen		Bales		lowenbales@g...	lowenbales3		Staff, Transcriber
	Quinn		Bales		traci@webchart...	quinnbales2		Transcriber
	Jasmine		Brown		mark@webchar...	jasmineb		Transcriber
	Jordan		Connelly		mark@webchar...	jordancon		Transcriber
	Margarie		Coombs		mark@webchar...	mcooms		Transcriber
	Gina	L	Davis		mark@webchar...	gdavis		Transcriber
	Dolores		Feeny		mark@webchar...	dfeeny		Transcriber
	Paula		Franklin		traci@webchart...	pfranklin01		Transcriber
	Faith		Hansen		ritesh@webcha...	fhansen		Transcriber
	Barbara		Johnston		traci@webchart...	bjohnston		Transcriber, Ma...
	Sally		Jones		mark@webchar...	sallyjones		Transcriber
	Gloria		LaForce		traci@webchart...	glaforce		Transcriber
	Joanne		Lee		mark@webchar...	joannelee		Transcriber
	Gerry		Miles		traci@webchart...	gmiles		Transcriber
	Connie		Miller		Nathan@WebC...	conniemiller		Transcriber
	User		Pool		traci@webchart...	SYS@POOL-US...		Transcriber
	Editor		Review		traci@webchart...	QA_DMD		Transcriber
	Michael		Scrofani		mark@webchar...	mscrofani		Transcriber, Ma...

### Fields within User Details

**Email:** This is a required field. The email address is part of a new user notification feature of the system. If this email address is incorrect or misspelled, the new user will not receive the system email used to create a unique username and password. See the “Resend Invite Email” section on page 132 for more information on the importance of the email field.

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

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

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

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

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

### Notes on Credentials field:

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

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

Phone/SMS: Optional field for contact information.

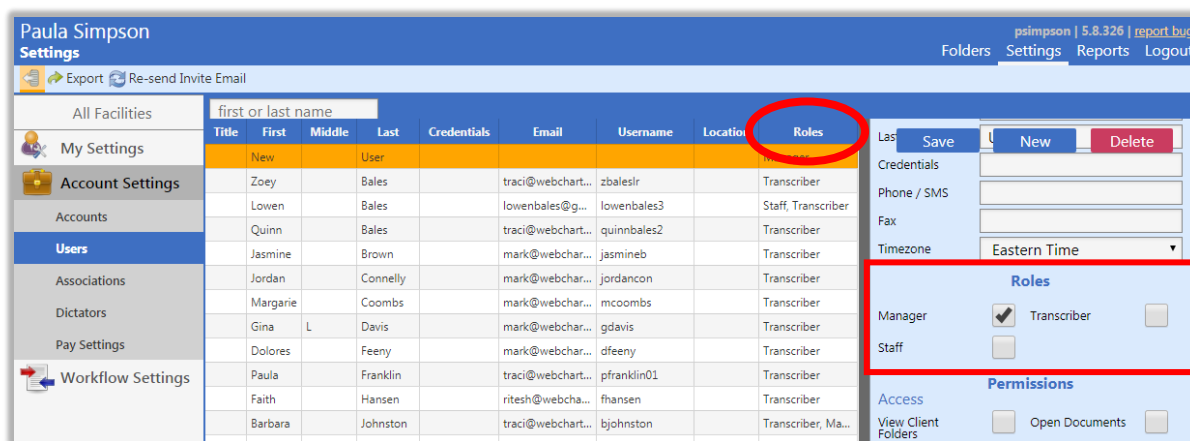
Fax: Optional field for fax number.

Time zone: Optional field for setting the time zone of the new user. The default is Eastern Time zone. While optional, this field is very important to the accurate presentation of date and time information within the Folders views, and also for STAT and on-time management of the dictations. Make sure the user’s time zone is set correctly with the Details Panel. For more information on STAT and on-time management, please see page 167.

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

## Roles

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



Title	First	Middle	Last	Credentials	Email	Username	Location	Roles
New			User					
	Zoey		Bales		traci@webchart...	zbalesir		Transcriber
	Lowen		Bales		lowenbales@g...	lowenbales3		Staff, Transcriber
	Quinn		Bales		traci@webchart...	quinnbales2		Transcriber
	Jasmine		Brown		mark@webchar...	jasmineb		Transcriber
	Jordan		Connelly		mark@webchar...	jordancon		Transcriber
	Margarie		Coombs		mark@webchar...	mcoombs		Transcriber
	Gina	L	Davis		mark@webchar...	gdavis		Transcriber
	Dolores		Feeny		mark@webchar...	dfeeny		Transcriber
	Paula		Franklin		traci@webchart...	pfranklin01		Transcriber
	Faith		Hansen		ritesh@webcha...	fhansen		Transcriber
	Barbara		Johnston		traci@webchart...	bjohnston		Transcriber, Ma...

**Roles**

Manager ☒ Transcriber ☐

Staff ☐

**Permissions**

Access

View Client Folders ☐ Open Documents ☐

Roles available include:

## Manager

The “Manager” role is an administrative position within the Transcription Team. By default, the Manager has access to all administrative functions with the Transcription Team’s account. The

Manager also has access to all workflow controls for dictations and transcriptions and can perform administrative duties such as creating and managing accounts, creating and managing users for both the Transcription Team and Facilities, and access to all reporting tools. Each of these administrative functions will be described in detail in upcoming sections.

### Transcriptionist

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

### Staff

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

### Notes on Roles:

1. Multiple Roles can be assigned to a user. When multiple Roles are assigned, Roles display in the Roles column separated by a comma.
2. For more information about adding or removing permissions is explained in the next section called “Permissions”.

### Permissions

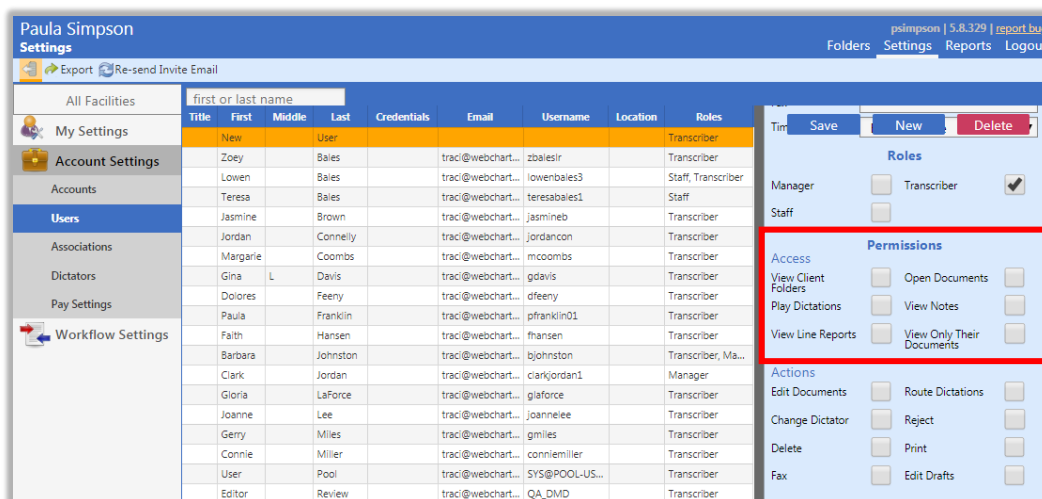
The “Permissions” section of the Details Panel is divided into four functional subsections, each of which deals with a specific part of the workflow:

- Access: Permissions contained within the Access section controls user access to certain functions of the workflow, such as accessing folders.
- Actions: Permissions contained within the Actions section controls certain actions users can take within the workflow. .
- Administrative: Permissions contained within the Administrative section control certain managerial/administrative tasks within the workflow.
- QA: Permissions contained within the QA section control certain QA controls the user can use in the workflow.



## Access

The “Access” section of Permissions contains five access controls:



first or last name		Title	First	Middle	Last	Credentials	Email	Username	Location	Roles
New User										
	Zoe				Bales		trac@webchart...	zbaiesir		Transcriber
	Lowen				Bales		trac@webchart...	lowenbales3		Staff, Transcriber
	Teresa				Bales		trac@webchart...	teresabales1		Staff
	Jasmine				Brown		trac@webchart...	jasmineb		Transcriber
	Jordan				Connelly		trac@webchart...	jordancon		Transcriber
	Margarie				Coombs		trac@webchart...	mcoombs		Transcriber
	Gina	L			Davis		trac@webchart...	gdavis		Transcriber
	Dolores				Feeny		trac@webchart...	dfeeny		Transcriber
	Paula				Franklin		trac@webchart...	pfranklin01		Transcriber
	Faith				Hansen		trac@webchart...	fransen		Transcriber
	Barbara				Johnston		trac@webchart...	bjohnston		Transcriber, Ma...
	Clark				Jordan		trac@webchart...	clarkjordan1		Manager
	Gloria				LaForce		trac@webchart...	glaforce		Transcriber
	Joanne				Lee		trac@webchart...	joannelee		Transcriber
	Gerry				Miles		trac@webchart...	gmiles		Transcriber
	Connie				Miller		trac@webchart...	conniemiller		Transcriber
	User				Pool		trac@webchart...	SYS@POOL-US...		Transcriber
	Editor				Review		trac@webchart...	QA_DMD		Transcriber

Save New Delete

Roles

Manager ☐ Transcriber ☒

Staff ☐

Permissions

Access

View Client Folders ☐ Open Documents ☐

Play Dictations ☐ View Notes ☐

View Line Reports ☐ View Only Their Documents ☐

Actions

Edit Documents ☐ Route Dictations ☐

Change Dictator ☐ Reject ☐

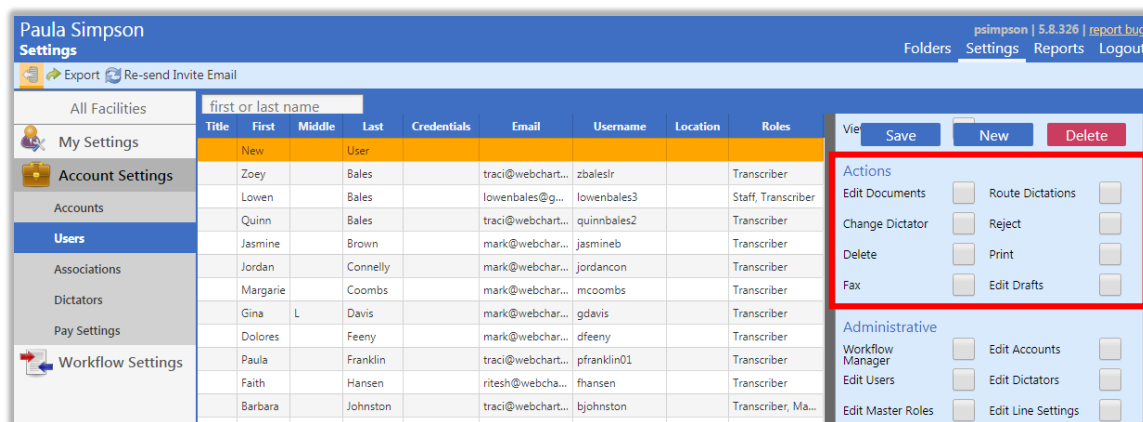
Delete ☐ Print ☐

Fax ☐ Edit Drafts ☐

- **View Client Folders:** This permission allows the user to see dictations and transcriptions within the Folders view. If this permission is not given, the user sees the Folders but no dictations or transcriptions are visible.
- **Open Documents:** This permission allows transcriptions to be opened. If this permission is not given, the “Open” button in Folders views toolbars is removed.
- **Play Dictations:** This permission allows audio files to be playable from the Portal. The “Play Audio” icon/function on the “Actions” column is available only if this permission is checked.
- **View Notes:** This permission allows the Notes folder to be visible. If this permission is unchecked, the Notes folder is not visible.
- **View Line Reports:** This permission allows Reports section of the portal to be visible.
- **View Only Their Documents.** This permission appears in the Access section only for the Transcriptionist Role. If this permission is checked, Transcriptionists only see the transcriptions produced by the Transcriptionist. If unchecked, Transcriptionist have access to all transcriptions regardless of the Transcriptionist.

## Actions

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



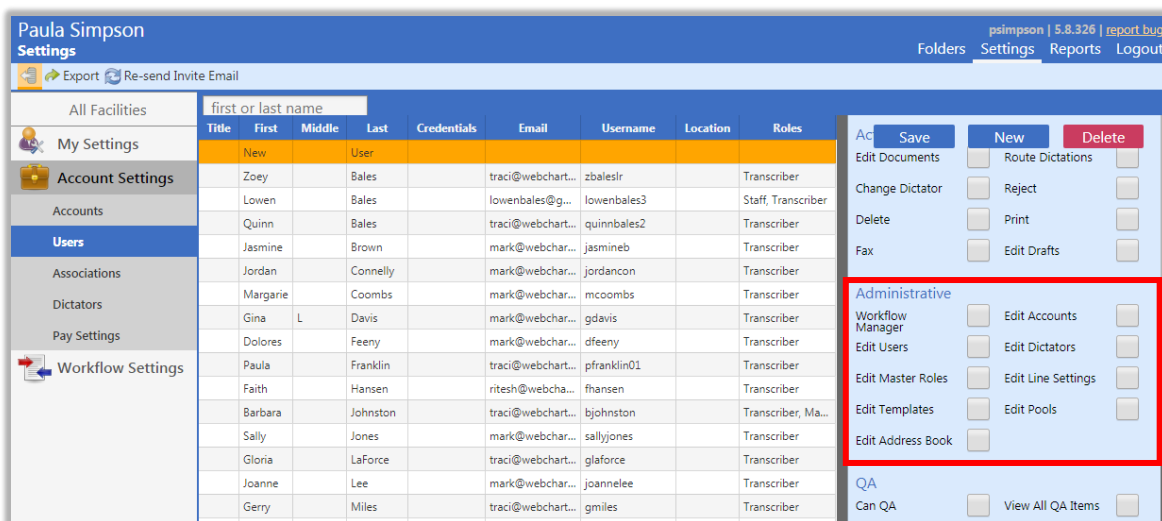
The screenshot shows the 'Settings' page for Paula Simpson. The 'Users' section is active, displaying a table of users. To the right of the table is an 'Actions' panel with a red border, containing eight actions with checkboxes: Edit Documents, Route Dictations, Change Dictator, Reject, Delete, Print, Fax, and Edit Drafts. Below this is an 'Administrative' section with checkboxes for Workflow Manager, Edit Accounts, Edit Users, Edit Dictators, Edit Master Roles, and Edit Line Settings.

Title	First	Middle	Last	Credentials	Email	Username	Location	Roles
New	User							
Traci	Bales				traci@webchart...	zbaleslr		Transcriber
Lowen	Bales				lowenbales@g...	lowenbales3		Staff, Transcriber
Quinn	Bales				traci@webchart...	quinnbales2		Transcriber
Jasmine	Brown				mark@webchar...	jasmineb		Transcriber
Jordan	Connelly				mark@webchar...	jordancon		Transcriber
Margarie	Coombs				mark@webchar...	mcoombs		Transcriber
Gina	L	Davis			mark@webchar...	gdavis		Transcriber
Dolores	Feeny				mark@webchar...	dfeeny		Transcriber
Paula	Franklin				traci@webchart...	pfranklin01		Transcriber
Faith	Hansen				ritesh@webcha...	fhansen		Transcriber
Barbara	Johnston				traci@webchart...	bjohnston		Transcriber, Ma...

- **Edit Documents:** This allows the user to edit transcriptions
- **Route Dictations:** This allows the user to route dictations manually to other users.
- **Change Dictator:** This allows the user to change a dictation or transcription from one Dictator’s account to another Dictator’s account.
- **Reject:** This allows the user to reject dictations in the transcription workflow; to access the Rejected folder within the Folders view; and to edit and re-submit documents that have been rejected and are within the Rejected folder.
- **Delete:** This allows the user to delete dictations and transcriptions from the workflow.
- **Print:** This allows the user to print transcriptions.
- **Fax:** This allows the user to fax transcriptions.
- **Edit Drafts:** This allows the access the Draft folder within the Folders view, and to edit transcriptions within the Draft folder.

## Administrative

The “Administrative” section controls permissions related to certain managerial/administrative tasks within the workflow. Administrative permissions are:



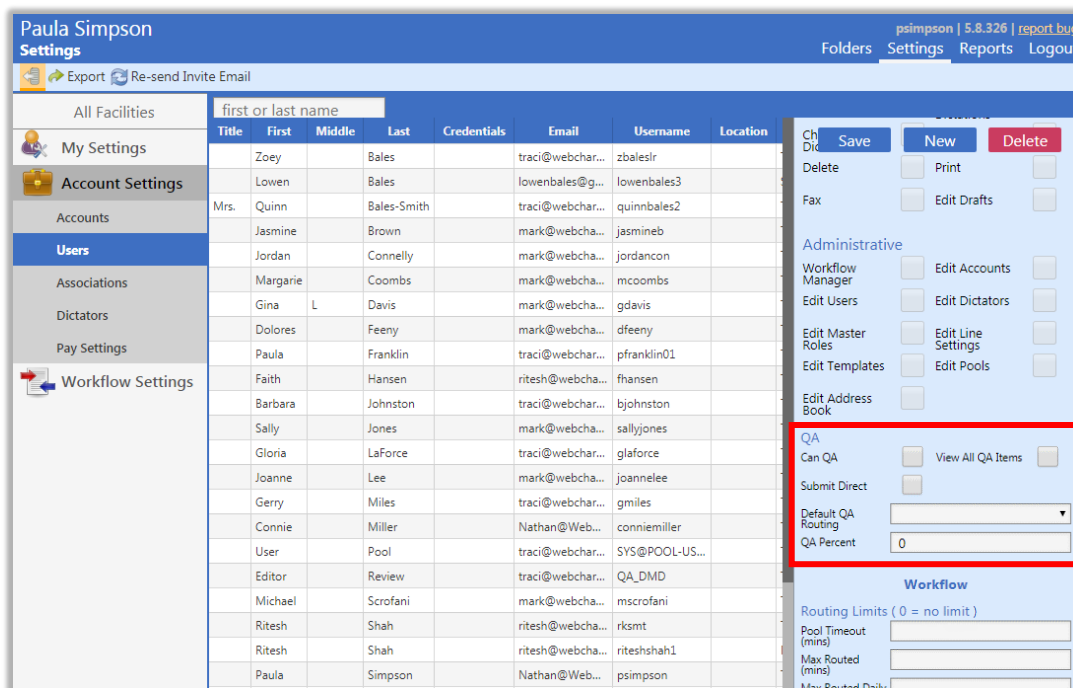
The screenshot shows the 'Settings' page for Paula Simpson. The 'Administrative' section on the right contains the following permissions:

- ☐ Edit Documents
- ☐ Route Dictations
- ☐ Change Dictator
- ☐ Reject
- ☐ Delete
- ☐ Print
- ☐ Fax
- ☐ Edit Drafts
- Administrative**
  - ☐ Workflow Manager
  - ☐ Edit Accounts
  - ☐ Edit Users
  - ☐ Edit Dictators
  - ☐ Edit Master Roles
  - ☐ Edit Line Settings
  - ☐ Edit Templates
  - ☐ Edit Pools
  - ☐ Edit Address Book
- QA**
  - ☐ Can QA
  - ☐ View All QA Items

- **Workflow Manager:** Provides access to the Workflow Manager folder.
- **Edit Accounts:** Allows the user to create and edit Facility accounts and their setups.
- **Edit Users:** Allows the user to create and edit Users.
- **Edit Dictators:** Allows the user to create and edit Dictators.
- **Edit Master Roles:** Allows the user to create and edit Master Roles.
- **Edit Line Settings:** Allows the user to create and edit Line Settings.
- **Edit Templates:** Allows the user to create and edit Templates.
- **Edit Pools:** Allows the user to create and edit Pools.
- **Edit Address Book:** Allows the user to create and edit entries within the Address Book.

## QA

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



- **Can QA:** This permission allows the user to perform QA functions such as editing and submitting transcriptions from the QA folder. More information on the QA folder can be found on page 66.
- **View All QA Items:** If checked, this permission allows the user to access all transcriptions within the QA workflow. If unchecked, the user will only see those files in QA assigned to them. More information on routing can be found on page 99.
- **Submit Direct:** This permission affects the routing of completed transcriptions by the Transcriptionist. If checked, transcriptions will by default automatically route directly to the Dictator's Inbox. Even if "Submit Direct" is checked, Transcriptionists always have the option of choosing to route a completed transcription to QA if needed.

If unchecked, two additional workflow boxes appear in the QA section:

- **Default QA Routing:** This field creates an automated routing of the Transcriptionist's completed transcriptions to a QA pool or directly to a QA editor for review. Transcriptions uploaded by the Transcriptionist are always routed to the pool or QA editor selected in this field.

- QA Percent: This field defines the percentage of work submitted by the transcriptionist that will automatically route to a QA pool or directly to a QA editor for review. For example, typing “100” will submit 100% of the Transcriptionist’s transcriptions into the QA workflow; “50” will select 50% of the transcriptions to route to QA.

Note: The QA percent for the Transcriptionist determines if the transcribed document goes to QA folder or to the Dictators’ Inbox folder. This applies to all files of this specific Transcriptionist, irrespective of which Dictator dictates it.

There is also a similar setting for the Dictator which determines if the transcriptions uploaded go to QA folder or submits to the Dictator’ Inbox folder. This setting is found under Dictator section and more information on this can be found here (All Facilities > Dictators).

It is possible to create conflicting settings by setting a Dictator to 100% QA and a Transcriptionist to 100% Direct Submit. In such conflicts, the Dictator specific setting supersedes the Transcriptionist setting and the uploads would go to QA folder (for example).

## Workflow

The Workflow settings define routing limits related to the user’s workflow. Routing limits are:

- Pool Timeout (mins): This setting determines how long a Transcriptionist can be idle (meaning, the computer has not detected any keystrokes) before the dictations that had downloaded to Transcriptionists are removed from his/her queue and returned to the pool.
- Max Routed (mins): This setting defines the maximum number of minutes of audio that can be routed to a Transcriptionist at any given moment. Once this number of minutes has been reached, the system does not send any further dictations to the Transcriptionist until the Transcriptionist finishes a dictation.
- Max Routed Daily (mins): This setting defines the maximum number of minutes of audio that can be routed to a Transcriptionist per day. Once this number of minutes has been reached, the system does not send any further dictations to the Transcriptionist until the end of the 24-hour period (the 24-hour period runs 12:01 am to 12:00 midnight).

## User Management

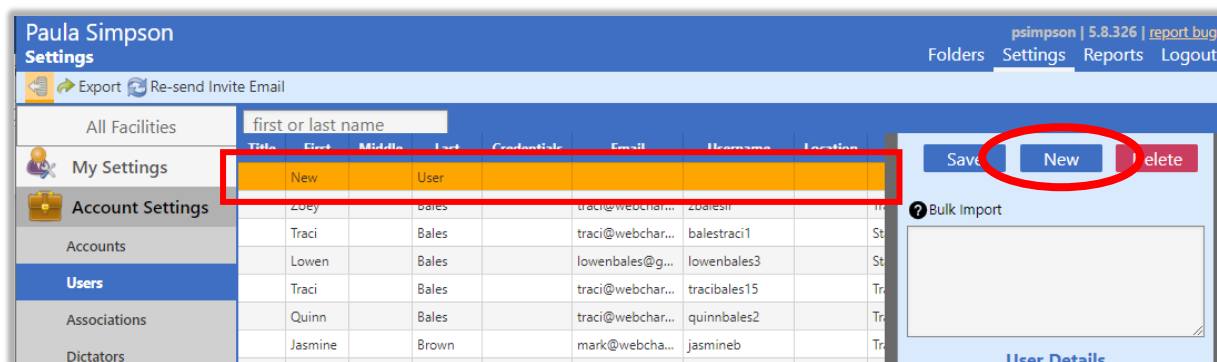
A number of functions related to Users are managed from the Users panel:

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

### Create User

To create a new user:

1. Click the “New” button in the User Details panel. This creates a new blank row identified initially as “New User” at the top of the User Section (see below).
2. Add user identifiers and set Role and all permissions as described in the above “User Details” section.



### Edit User

To edit an existing user:

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

Paula Simpson  
Settings

psimpson | 5.8.326 | [report bug](#)

Folders Settings Reports Logout

Export Re-send Invite Email

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Title	First	Middle	Last	Credentials	Email	Username
	Zoey		Bales		traci@webchar...	zbaleslr
	Lowen		Bales		lowenbales@g...	lowenbales3
	Quinn		Bales		traci@webchar...	quinnbales2
	Jasmine		Brown		mark@webcha...	jasmineb
	Jordan		Connelly		mark@webcha...	jordancon
	Margarie		Coombs		mark@webcha...	mcoombs
	Gina	L	Davis		mark@webcha...	gdavis
	Dolores		Feeny		mark@webcha...	dfeeny
	Paula		Franklin		traci@webchar...	pfranklin01
	Faith		Hansen		ritesh@webcha...	fhanzen
	Barbara		Johnston		traci@webchar...	bjohnston
	Sally		Jones		mark@webcha...	sallyjones
	Gloria		LaForce		traci@webchar...	glaforce
	Joanne		Lee		mark@webcha...	joannelee
	Gerry		Miles		traci@webchar...	gmiles
	Connie		Miller		Nathan@WebC...	conniemiller
	User		Pool		traci@webchar...	SYS@POOL-US...
	Editor		Review		traci@webchar...	QA_DMD
	Michael		Scrofani		mark@webcha...	mscrofani

Save New Delete

Bulk Import

User Details

Email \* traci@webchartmd.

Title

First name \* Quinn

Middle name

Last name \* Bales

Credentials

Phone / SMS

Fax

Timezone Eastern Time

## Delete User

To delete a user:

1. Click the row of the user to be edited. Row highlights in gold.
2. Press the "Delete" button.

Paula Simpson  
Settings

psimpson | 5.8.326 | [report bug](#)

Folders Settings Reports Logout

Export Re-send Invite Email

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Title	First	Middle	Last	Credentials	Email	Username	Location
	Zoey		Bales		traci@webchar...	zbaleslr	
	Lowen		Bales		lowenbales@g...	lowenbales3	
	Jasmine		Brown		mark@webcha...	jasmineb	
	Jordan		Connelly		mark@webcha...	jordancon	
	Margarie		Coombs		mark@webcha...	mcoombs	
	Gina	L	Davis		mark@webcha...	gdavis	
	Dolores		Feeny		mark@webcha...	dfeeny	
	Paula		Franklin		traci@webchar...	pfranklin01	
	Faith		Hansen		ritesh@webcha...	fhanzen	
	Barbara		Johnston		traci@webchar...	bjohnston	
	Sally		Jones		mark@webcha...	sallyjones	
	Gloria		LaForce		traci@webchar...	glaforce	
	Joanne		Lee		mark@webcha...	joannelee	
	Gerry		Miles		traci@webchar...	gmiles	
	Connie		Miller		Nathan@Web...	conniemiller	

Save New Delete

Bulk Import

User Details

Email \* mark@webchartmd.com

Title

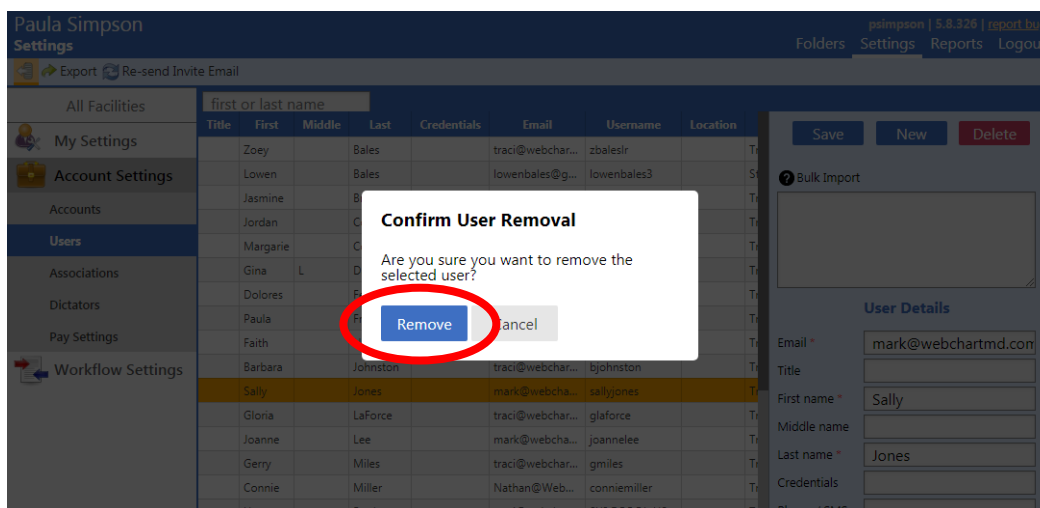
First name \* Sally

Middle name

Last name \* Jones

Credentials

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



#### Notes on Delete feature:

1. When Dictators are deleted, any dictations and transcriptions related to the Dictator are removed from screen but retained in the database. To purge dictations and transcriptions from WebChartMD, contact the helpdesk.
2. Users accidentally deleted from an account can be restored. Contact the helpdesk for assistance.



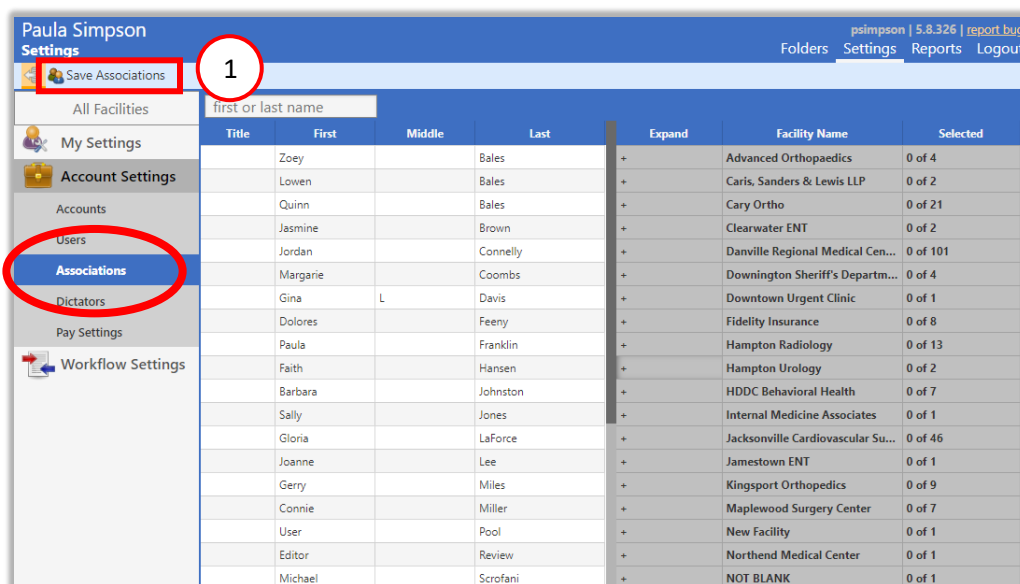
## Associations

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

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

Notes on Associations:

1. Associations only affects visibility of Dictators in the Folders view. It has no bearing on the Transcriptionists being able to view Dictations in the transcription tool to transcribe them.
2. If a member of the Transcription Team is not associated with a Dictator, the Transcription Team member will be unable to access Transcriptions or Dictations for that Dictator in the Folders view.



The screenshot shows the Paula Simpson Settings page. The left sidebar contains a list of settings: All Facilities, My Settings, Account Settings, Users, Associations (highlighted with a red circle), Dictators, Pay Settings, and Workflow Settings. The main content area shows a table with columns: Title, First, Middle, Last, Expand, Facility Name, and Selected. The table lists various facilities and the number of dictators associated with each. A red circle with the number '1' is placed over the 'Save Associations' button in the top left corner of the main content area.

### Folder Management Function

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

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

### Managing Associations

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

#### Step 1

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

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

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

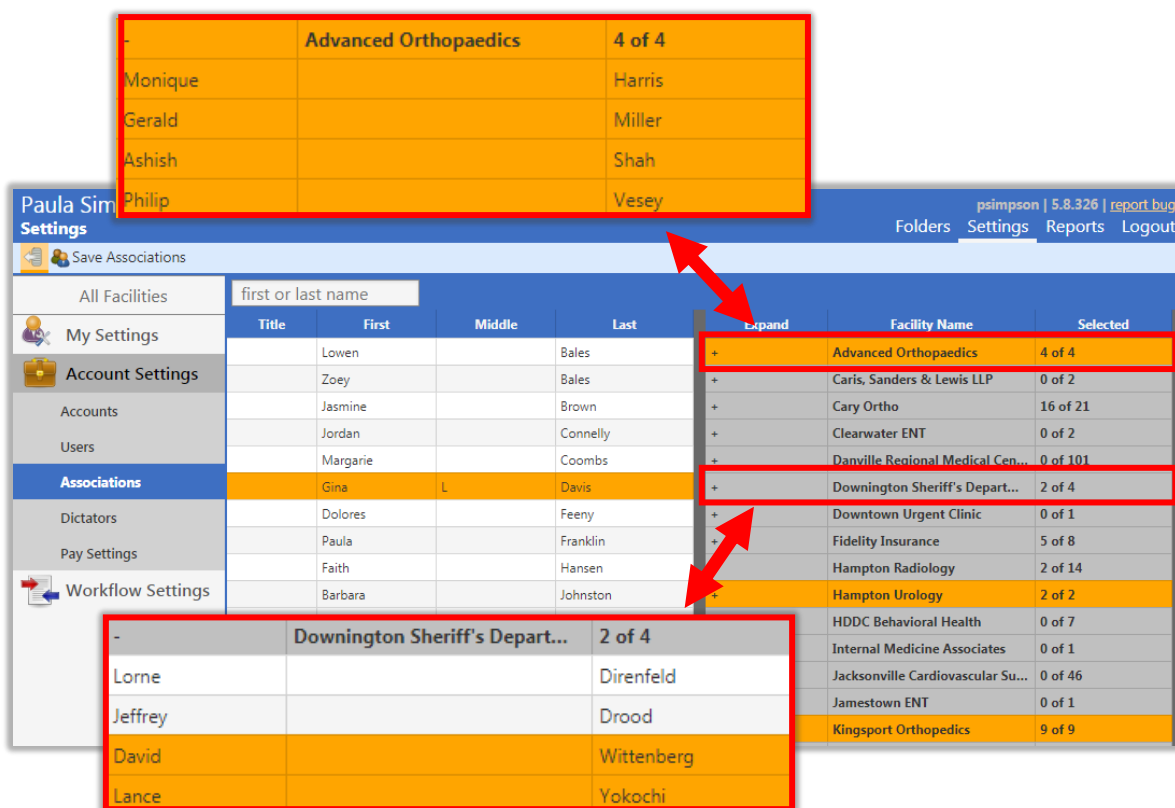
#### Step 2

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

Paula Simpson Settings					psimpson   5.8.326   <a href="#">report bug</a>		
Save Associations					Folders Settings Reports Logout		
All Facilities	first or last name						
My Settings	Title	First	Middle	Last	Expand	Facility Name	Selected
Account Settings		Lowen		Bales	+	Advanced Orthopaedics	4 of 4
Accounts		Zoey		Bales	+	Caris, Sanders & Lewis LLP	0 of 2
Users		Jasmine		Brown	+	Cary Ortho	16 of 21
Associations		Jordan		Connelly	+	Clearwater ENT	0 of 2
Dictators		Margarie		Coombs	+	Danville Regional Medical Cen...	0 of 101
Pay Settings		Gina	L	Davis	+	Downington Sheriff's Depart...	2 of 4
Workflow Settings		Dolores		Feeny	+	Downtown Urgent Clinic	0 of 1
		Paula		Franklin	+	Fidelity Insurance	5 of 8
		Faith		Hansen	+	Hampton Radiology	2 of 14
		Barbara		Johnston	+	Hampton Urology	2 of 2
		Clark		Jordan	+	HDDC Behavioral Health	0 of 7
		Gloria		LaForce	+	Internal Medicine Associates	0 of 1
		Joanne		Lee	+	Jacksonville Cardiovascular Su...	0 of 46
		Gerry		Miles	+	Jamestown ENT	0 of 1
		Connie		Miller	+	Kingsport Orthopedics	9 of 9

## Notes on Step 2:

- Clicking the “+” symbol to the left of the Facility name expands the Facility to display the Dictators at the Facility.
- The Facility name displays highlighted only if all Dictators are associated to the user. If the user is associated with all Dictators at the Facility, then the entire Facility name gets highlighted in gold (as in example below, 4 of 4) and the “Selected” column displays the number as such.
- If all Dictators at the Facility are not associated, the Facility name remains gray, but the “Selected” column displays the number of Dictators associated with the user (as in example below, 2 of 4).



The screenshot shows the 'Associations' section of the WebChartMD interface. The main table lists facilities and the number of dictators associated with the user. Two facilities are highlighted with red boxes and arrows:

- Advanced Orthopaedics** (4 of 4): This facility is highlighted in gold. The expanded view shows four dictators: Monique Harris, Gerald Miller, Ashish Shah, and Philip Vesey.
- Downington Sheriff's Department** (2 of 4): This facility is highlighted in gray. The expanded view shows four dictators: Lorne Drenfeld, Jeffrey Drood, David Wittenberg, and Lance Yokochi.

The interface also includes a sidebar with 'My Settings', 'Account Settings', and 'Workflow Settings'. The main table has columns for 'Title', 'First', 'Middle', 'Last', 'Expand', 'Facility Name', and 'Selected'.

## Step 3

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

## To Add a New Association

1. Ensure that the transcription team member's name is highlighted on the left side of the panel.
2. To associate the highlighted user with all Dictators at a Facility, hold down the Control key on the keyboard and click the Facility name to the right. This associates the Transcription Team member to all Dictators at the Facility.
3. To associate the user with single or multiple Dictators at a Facility, click the "+" symbol to expand the selection, and click on only the Dictator names required to be associated. Once clicked, selections will become highlighted.

## Remove Existing Association

1. Ensure that the transcription team member's name is highlighted on the left side of the panel.
2. Hold down the Control key and click Facility name (or Dictator name(s) in the expanded view). The highlight color will remove, and the "Selected" column updates the number of selected Dictators.

Paula Simpson  
Settings

psimpson | 5.8.326 | report bug  
Folders Settings Reports Logout

Save Associations

All Facilities first or last name

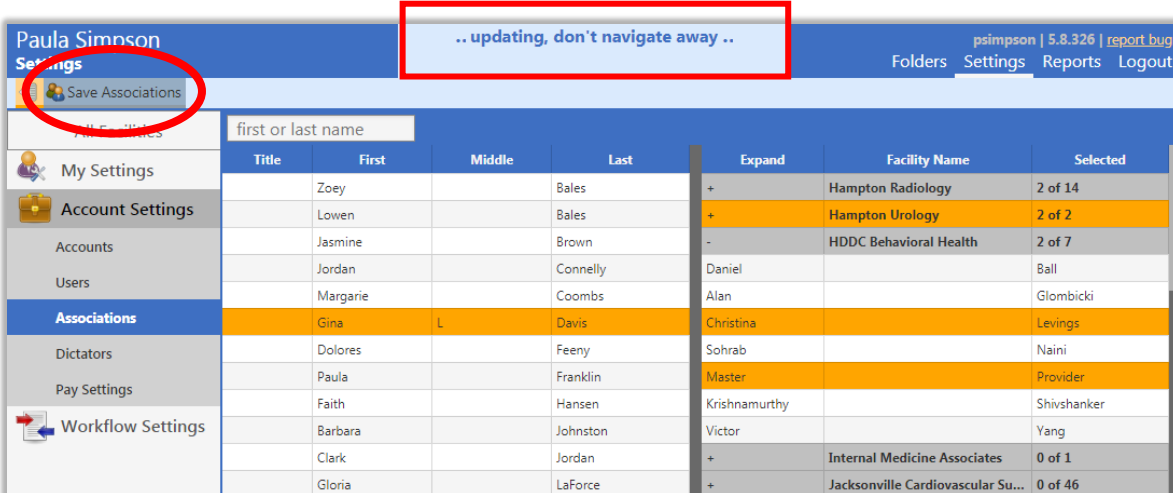
Title	First	Middle	Last	Expand	Facility Name	Selected
	Zoey		Bales	+	Hampton Radiology	2 of 14
	Lowen		Bales	+	Hampton Urology	2 of 2
	Jasmine		Brown	-	HDDC Behavioral Health	0 of 7
	Jordan		Connelly		Daniel	Ball
	Margarie		Coombs		Alan	Glombicki
	Gina	L	Davis		Christina	Levings
	Dolores		Feeny		Sohrab	Naini
	Paula		Franklin		Master	Provider
	Faith		Hansen		Krishnamurthy	Shivshanker
	Barbara		Johnston		Victor	Yang
	Clark		Jordan	+	Internal Medicine Associates	0 of 1
	Gloria		LaForce	+	Jacksonville Cardiovascular Su...	0 of 46
				+	Jamestown ENT	0 of 1
				+	Kingsport Orthopedics	9 of 9
				+	Maplewood Surgery Center	0 of 7
				+	New Facility	0 of 1

HDDC Behavioral Health 2 of 7

Daniel	Ball
Alan	Glombicki
Christina	Levings
Sohrab	Naini
Master	Provider
Krishnamurthy	Shivshanker
Victor	Yang

## Step 4

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



The screenshot shows the 'Paula Simpson Settings' page. The 'Associations' section is active, displaying a table of user associations. The 'Save Associations' button in the toolbar is circled in red. A message at the top of the page, also circled in red, reads '.. updating, don't navigate away ..'.

Title	First	Middle	Last	Expand	Facility Name	Selected
	Zoey		Bales	+	Hampton Radiology	2 of 14
	Lowen		Bales	+	Hampton Urology	2 of 2
	Jasmine		Brown	-	HDDC Behavioral Health	2 of 7
	Jordan		Connelly	Daniel		Ball
	Margarie		Coombs	Alan		Glombicki
	Gina	L	Davis	Christina		Levings
	Dolores		Feeny	Sohrab		Naini
	Paula		Franklin	Master		Provider
	Faith		Hansen	Krishnamurthy		Shivshanker
	Barbara		Johnston	Victor		Yang
	Clark		Jordan	+	Internal Medicine Associates	0 of 1
	Gloria		LaForce	+	Jacksonville Cardiovascular Su...	0 of 46

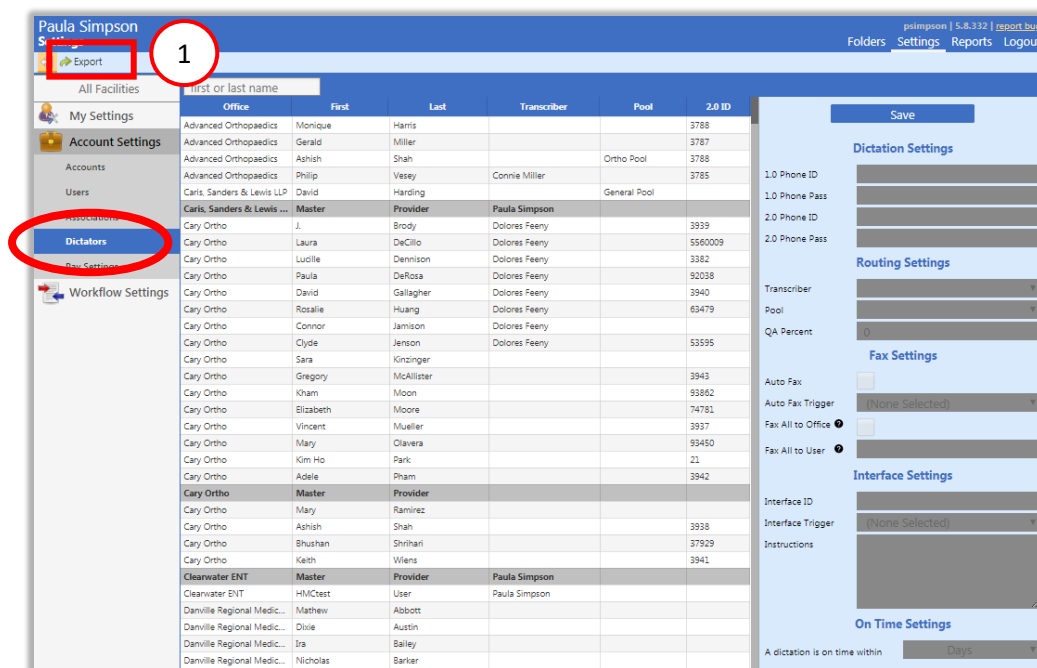
## Dictators

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

### Folder Management Functions

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

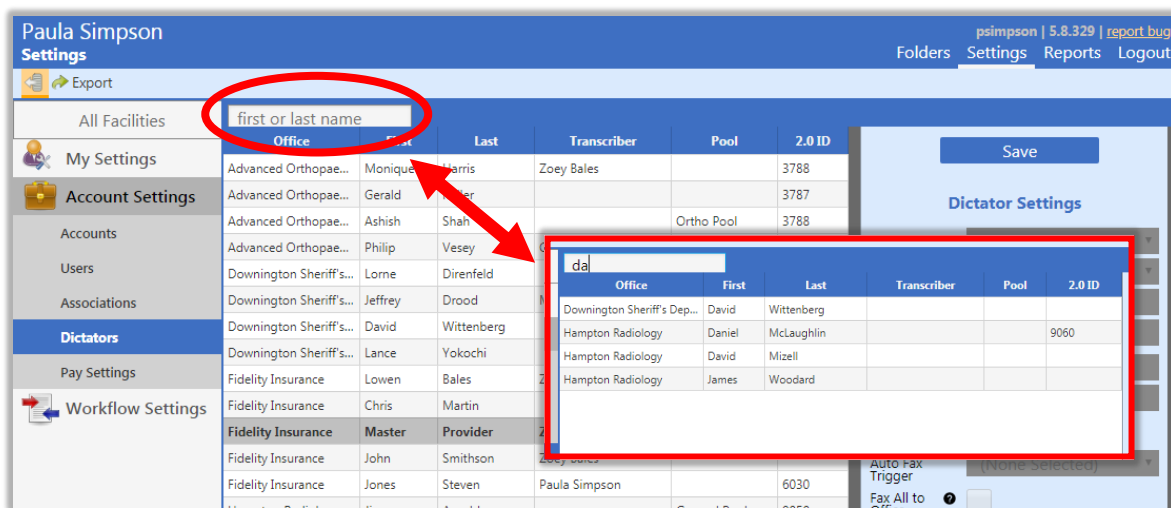
- 1 Export: This exports the list of Dictators at all Facilities as an excel file. Pressing the “Export” button exports the excel file to the Downloads folder on the user’s computer. For additional details see page 131.



Office	First	Last	Transcriber	Pool	2.0 ID
Advanced Orthopaedics	Monique	Harris			3788
Advanced Orthopaedics	Gerald	Miller			3787
Advanced Orthopaedics	Ashish	Shah		Ortho Pool	3788
Advanced Orthopaedics	Philip	Vesey	Connie Miller		3785
Caris, Sanders & Lewis LLP	David	Harding		General Pool	
Caris, Sanders & Lewis ...	Master	Provider	Paula Simpson		
Cary Ortho	J.	Brody	Dolores Feeny		3939
Cary Ortho	Laura	DeCillo	Dolores Feeny		5560009
Cary Ortho	Ludille	Dennison	Dolores Feeny		3382
Cary Ortho	Paula	DeRosa	Dolores Feeny		92038
Cary Ortho	David	Gallagher	Dolores Feeny		3940
Cary Ortho	Rosalie	Huang	Dolores Feeny		63479
Cary Ortho	Connor	Jamison	Dolores Feeny		
Cary Ortho	Clyde	Jensong	Dolores Feeny		53555
Cary Ortho	Sara	Kinsinger			
Cary Ortho	Gregory	McAllister			3943
Cary Ortho	Kham	Moore			93862
Cary Ortho	Elizabeth	Moore			74761
Cary Ortho	Vincent	Mueller			3937
Cary Ortho	Mary	Olivera			93450
Cary Ortho	Kim Ho	Park			21
Cary Ortho	Adele	Pham			3942
Cary Ortho	Master	Provider			
Cary Ortho	Mary	Ramirez			
Cary Ortho	Ashish	Shah			3938
Cary Ortho	Bhushan	Shrinani			37929
Cary Ortho	Keith	Wiens			3941
Clearwater ENT	Master	Provider	Paula Simpson		
Clearwater ENT	HMCtest	User			
Danville Regional Medic...	Mathew	Abbott			
Danville Regional Medic...	Diola	Austin			
Danville Regional Medic...	Ira	Bailey			
Danville Regional Medic...	Nicholas	Barker			

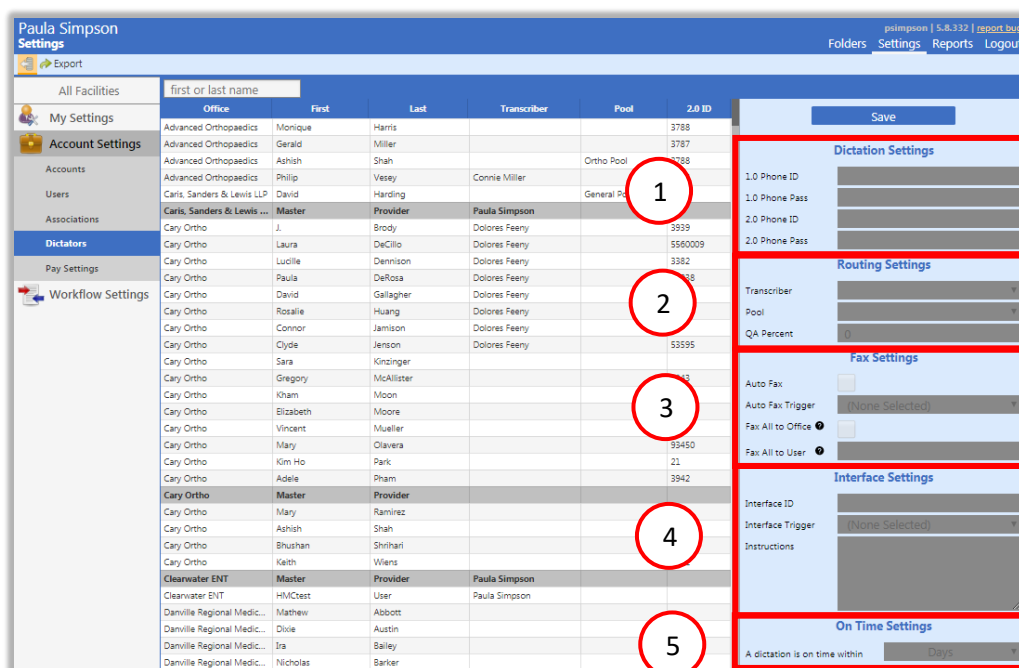
### Search Feature

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



## Managing Dictator Settings

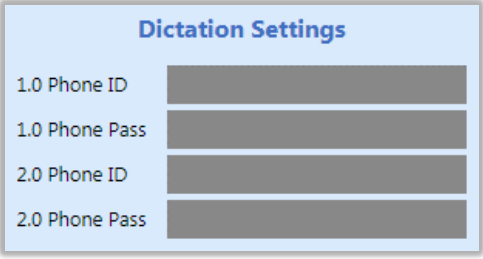
The Dictator settings found in the Details Panel can be divided into five sections:



## 1 Dictation Setup

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

- Standard Phone Dictation System
- Custom Phone Dictation System



The screenshot shows a form titled "Dictation Settings" with a light blue header. Below the header, there are four rows of input fields, each with a label on the left and a greyed-out input box on the right. The labels are: "1.0 Phone ID", "1.0 Phone Pass", "2.0 Phone ID", and "2.0 Phone Pass".

Dictation Settings	
1.0 Phone ID	
1.0 Phone Pass	
2.0 Phone ID	
2.0 Phone Pass	

### Standard Phone Dictation System

Key features of the standard phone dictation are:

- pre-configured set of keypad presses and workflow.
- Two-factor authentication.
  - The first factor is the Dictator's "Phone ID", and this is pre-set by the system. The Phone ID of the Dictator is assigned by the system at the time of creating their account under Users screen. This pre-assigned number is contained in the greyed out box and cannot be changed.
  - The second factor is the Dictator's "Phone Pass", or passcode, and this factor can be configured. The passcode field is used to create a numeric passcode for the Dictator. The passcode can be up to seven digits in length. The default value of "-1" in the passcode is system generated at the time of user account creation so that it cannot authenticate on the phone line and acts as a disable/not in use method.
- The default call-in number for the standard phone system is our toll-free line, 1-877-864-8844, with a backup number of 1-877-206-1761 assigned to the 1.0 system. However, local call-in numbers can also be assigned to the standard phone system if required.
- The standard phone system has a fixed keypad configuration as follows:



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

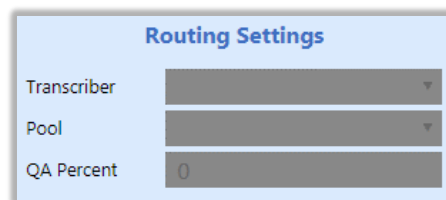
- The top-of-call workflow consists of the following prompts / dialogue:
  - “Welcome to WebChartMD”
  - “Please enter your user ID followed by the pound sign”
  - “Please enter your passcode followed by the pound sign”
  - “Begin speaking at the tone”

### Custom Phone Dictation System

Key features of the custom phone dictation system are:

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

## 2 Routing Settings



The Routing Settings dialog box contains three fields: Transcriber (a dropdown menu), Pool (a dropdown menu), and QA Percent (a text input field with the value 0).

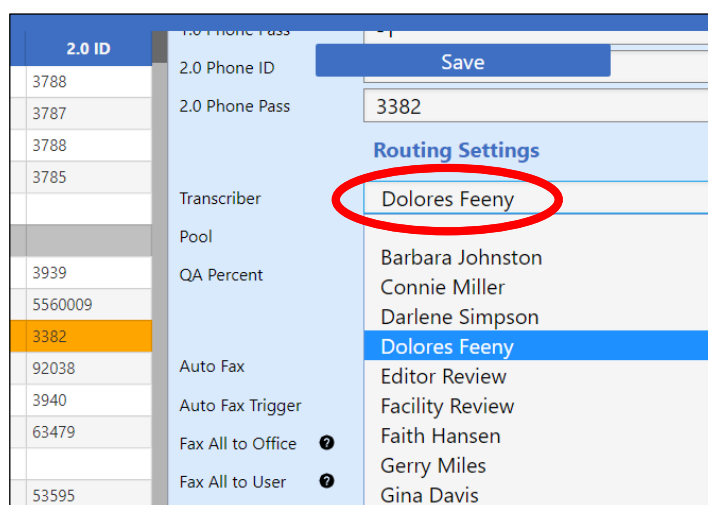
WebChartMD has robust and highly configurable routing capabilities as part of the Workflow Settings tools (see page 200), but more straightforward Dictator-specific routing settings can be set using the Routing Settings. Dictator-specific routing options include a direct routing assignment to a specific Transcriptionist, and a direct routing assignment to a specific pool.

### Transcriptionist Routing

To set a Dictator's dictations to always route to a specific Transcriptionist:

#### Step 1

Click the Transcriptionist dropdown in the Routing Settings area of the Dictator Settings panel.



The Dictator Settings panel shows a list of 2.0 IDs on the left. The ID 3382 is highlighted in orange. On the right, the Routing Settings section is expanded, showing a dropdown menu for the Transcriber. The name 'Dolores Feeny' is circled in red and highlighted in blue in the dropdown list. Other names in the list include Barbara Johnston, Connie Miller, Darlene Simpson, Editor Review, Facility Review, Faith Hansen, Gerry Miles, and Gina Davis. A 'Save' button is visible at the top right of the Routing Settings section.

#### Step 2

Select the Transcriptionist.

### Step 3

Click “Save”. Once saved, all dictations for the Dictator would be directly routed to the selected Transcriptionist and would not be part of any pools and would not be available to any other Transcriptionist.

### Pool Routing

To set a Dictator’s dictations to always route to a specific Pool, repeat the same steps as with Transcriptionist routing, but using the “Pool” dropdown. Once selected, all dictations for the Dictator would be directly routed to the selected Pool and would be available to any Transcriptionist(s) associated with that Pool.

More information on Pools can be found on page 214.

More information on Associating Transcriptionists to Pools can be found on page 217.

### QA Percent

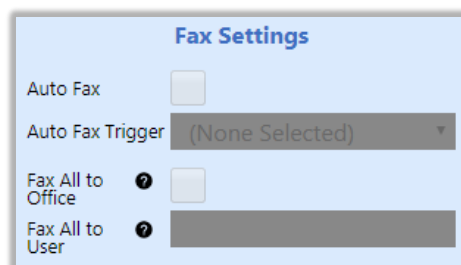
This field defines what percentage of transcriptions transcribed for the selected Dictator will be automatically sent to the QA routing assigned to either the Transcriptionist or Pool. A value between 0 and 100 can be entered, with 100 meaning that all work is routed to QA. If no value is entered, then no files will automatically route to QA. If a value other than “0” or “100” are entered, the system’s algorithm randomly selects transcriptions from the workflow to route to QA in order to meet the percentage of files designated for QA review.

Note: The QA percent for the Dictator determines if the transcribed document goes to QA folder or to the Dictators’ Inbox folder. This applies to all files of this specific Dictator, irrespective of which Transcriptionist transcribes and uploads it.

There is also a similar setting for the Transcriptionist which determines if the transcriptions uploaded by them goes to QA folder or submits to the Dictator. This setting is found under Users section and more information on this can be found here (All Facilities > Users).

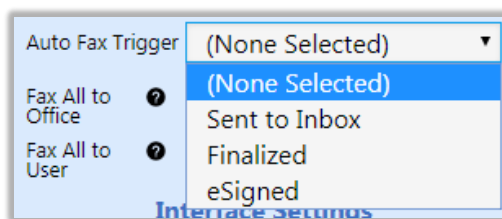
It is possible to create conflicting settings by setting a Dictator to 100% QA and a Transcriptionist to 100% Direct Submit. In such conflicts, the Dictator specific setting supersedes the Transcriptionist setting and the uploads would go to QA folder (for example).

## Fax Settings

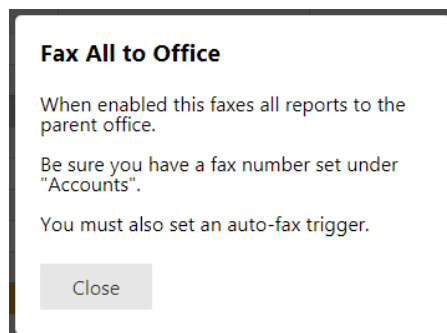


This section of the Details Panel consists of four settings.

- **Auto Fax:** When checked, the system will automatically fax completed transcriptions based on the Auto Fax Trigger (below).
- **Auto Fax Trigger:** This dropdown menu contains three options based on the workflow status of the document (for more information on Statuses, see page 96).

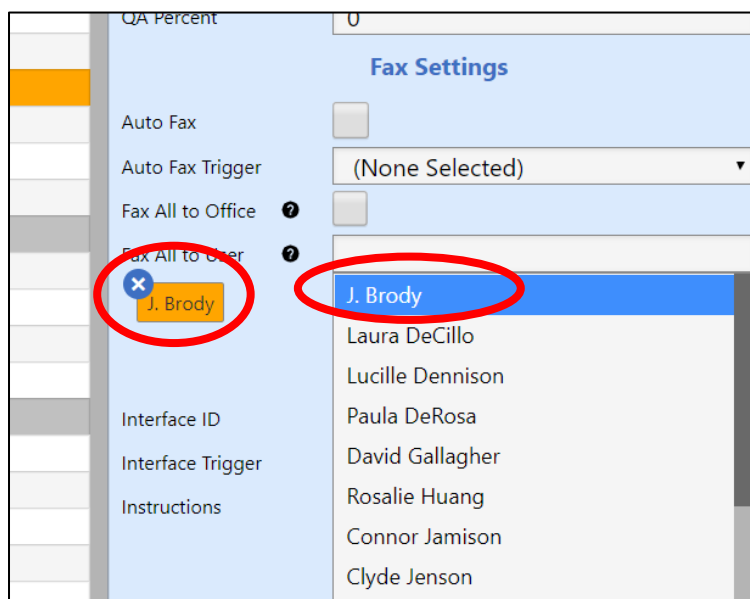


- **Sent to Inbox:** This condition is met when a transcription is submitted to the Dictator's Inbox folder.
- **Finalized:** This condition is met when the transcription is sent to the Final folder.
- **eSigned:** This condition is met when the transcription has been eSigned by the Dictator. Re-signing a transcription does not retrigger the auto faxing.
- **Fax All to Office:** When checked, a copy of all transcriptions for this specific Dictator are faxed to their Dictator's office fax number in the Address Book.



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

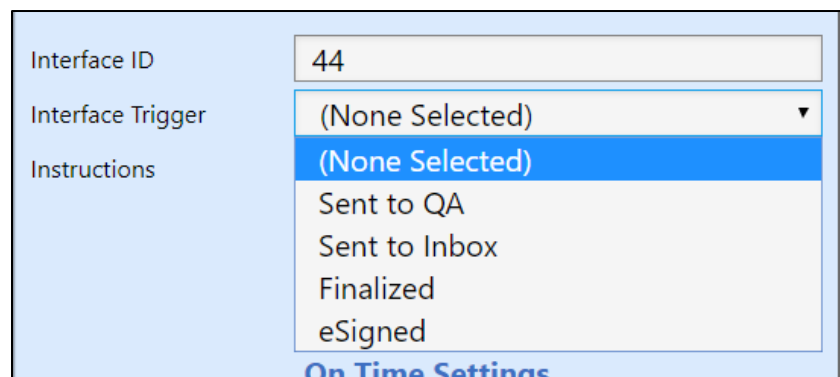
To set a single or multiple Dictator to automatically receive faxed copies of transcriptions, click the dropdown and select the Dictator. Once selected, the recipient Dictator's name appears as a "tag" adjacent to the dropdown (see below). To remove a selected recipient Dictator, click the "x" in the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



#### 4 Interface Settings

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

- **Interface ID:** This field contains the ID used by the electronic medical record system to identify the selected Dictator. For more details on Interface setups, please contact the WebChartMD Helpdesk.
- **Interface Trigger:** This field defines the trigger, or when the transcription will interface into the electronic medical system. Trigger options are:



Sent to QA: transcriptions interface when sent to QA.

Sent to Inbox: transcriptions interface when sent to the Dictator's Inbox.

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

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

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

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

#### 5 On Time Settings

This section of the Details Panel defines the required turn-around time for transcriptions being returned for the selected Dictator.

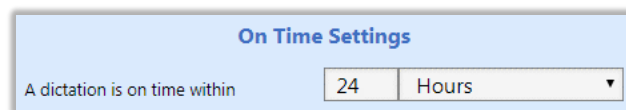
The “On Time Settings” section has two settings fields: a free text box to the left, and a dropdown to the right.

Free text box. This box is used to enter a whole numbers (fractions, e.g. “2.5” are not accepted).

Dropdown. This field contains two options:

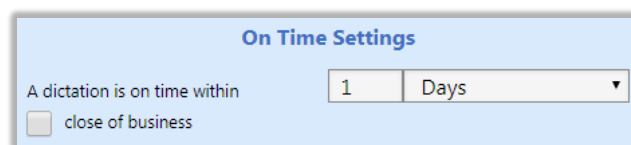
- Days
- Hours

The combination of the free text field and dropdown are used to create the on-time definition. For example, a turn-around time of 24 hours is created as follow:



The screenshot shows a light blue box titled "On Time Settings". Inside, the text "A dictation is on time within" is followed by a text input field containing the number "24" and a dropdown menu currently set to "Hours".

- On selecting "Hours" in the dropdown and adding a number, the transcriptions are considered to be On Time within that time from being uploaded.
- On selecting "Days" in the dropdown and adding a number, the transcriptions are considered to be On Time within that time from being uploaded.
- An additional settings "Close of business" appears when "Days" is selected. Checking this setting allows the transcription to be On Time till the specified day at 5pm.



The screenshot shows the "On Time Settings" form with the text input field containing "1" and the dropdown menu set to "Days". Below the input field, there is a checkbox labeled "close of business" which is checked.

#### Notes on “On Time Settings”

1. “On Time” assumes that dictations uploaded on Friday are due Monday, not Saturday. Weekend hours are not counted toward late turn-around.

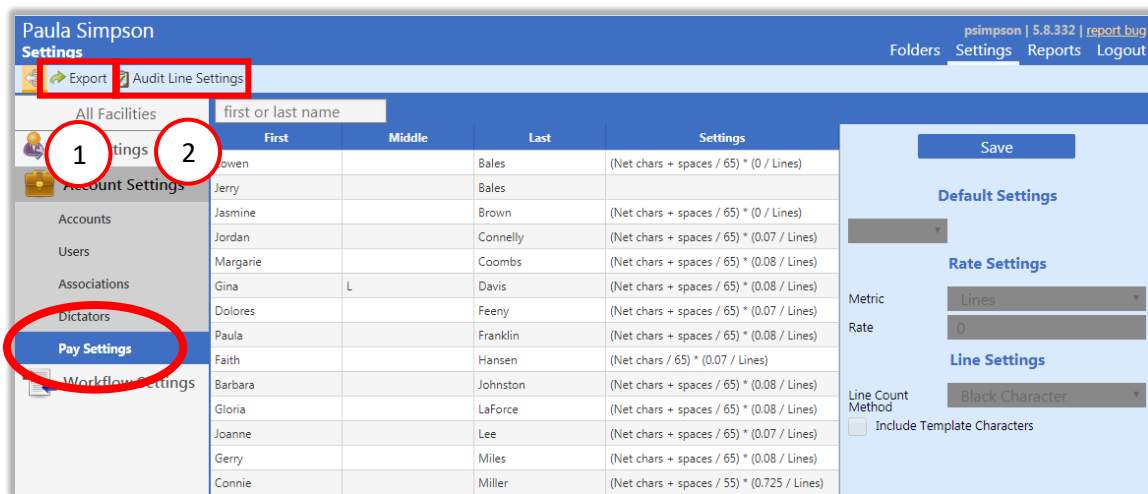
## Pay Settings

Pay Settings is used to set the line count methodology and the pay rates for Transcription Team members. Individual Transcriptionists can be assigned multiple pay rate settings as needed by the Transcription Team.

Note: The “Pay Settings” menu is replaced by “Bill Settings” when the dropdown is changed from All Facilities to a Named Facility. Bill Settings is used to set Dictator line count methodologies and charge bill rates.

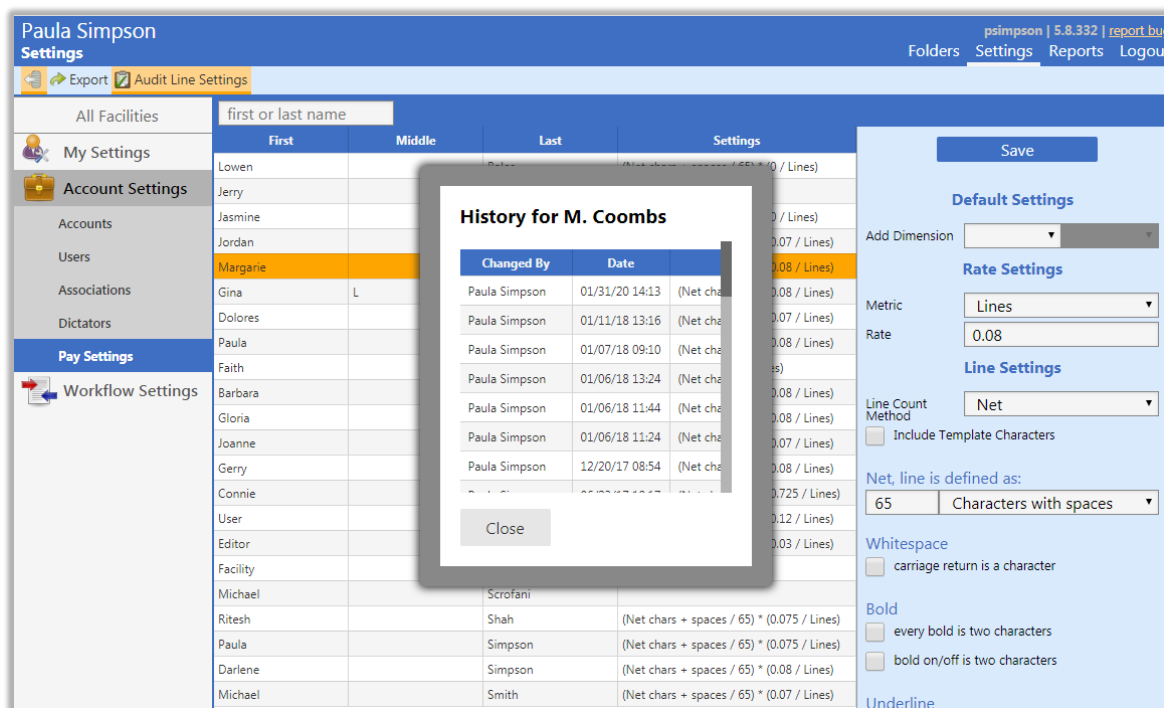
### Folder Management Functions

The Pay Settings view has two Folder Management Function buttons in the toolbar:



- 1 Export: This exports the list of Dictators as an excel file. Pressing the “Export” button exports the excel file to the Downloads folder on the user’s computer. For additional details see page 131.
- 2 Audit Line Settings: This feature provides an audit log of the changes that have been made to a Transcriptionists’ pay rate and line count methodology settings. Clicking the “Audit Line Settings” button after selecting a Transcriptionists displays an audit log (below):





**History for M. Coombs**

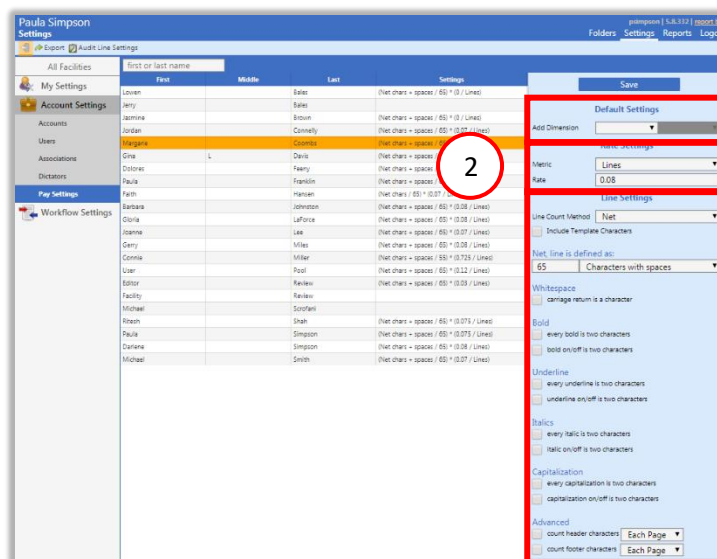
Changed By	Date	Settings
Paula Simpson	01/31/20 14:13	(Net chars + spaces / 65) * (0.075 / Lines)
Paula Simpson	01/11/18 13:16	(Net chars + spaces / 65) * (0.075 / Lines)
Paula Simpson	01/07/18 09:10	(Net chars + spaces / 65) * (0.075 / Lines)
Paula Simpson	01/06/18 13:24	(Net chars + spaces / 65) * (0.075 / Lines)
Paula Simpson	01/06/18 11:44	(Net chars + spaces / 65) * (0.075 / Lines)
Paula Simpson	01/06/18 11:24	(Net chars + spaces / 65) * (0.075 / Lines)
Paula Simpson	12/20/17 08:54	(Net chars + spaces / 65) * (0.075 / Lines)

The Audit Log contains three columns:

- **Changed By:** This column contains the name of the user that made changes to the line count methodology and pay rate for the selected Transcription Team member.
- **Date:** This column contains the time & date of when the changes were saved.
- **Settings (not visible in image above):** This contains details of what change(s) were made to the line count methodology.

Clicking a row in the audit trail loads the line count methodology and pay rate information into the Default Settings Panel as it was set on the date and time of the audit trail entry.

### *The User Details Panel*



The “User Details” panel has three subsections:

- 1 Dimension Settings: This feature creates the Dimension(s) (i.e. the types or variations) of pay rates and line count methodologies used for the Transcription Team member.
- 2 Rate Settings: This section defines the metric and rate used for each Dimension.
- 3 Line Settings: This section defines the line count methodology used with each Dimension.

## Dimension Settings

The Dimensions feature is one of the most powerful and agile features of WebChartMD. It allows for the creation of highly customized pay rates where required by the Transcription Team. A few examples of different circumstances requiring customized Pay Rate settings include:

- A Transcriptionist is paid one rate for transcribing and a different rate for QA.
- A Transcriptionist is paid one rate for standard TAT files and a different rate for STAT files.
- A Transcriptionist is paid using gross line count methodology when transcribing for one Facility and net line count methodology when transcribing for another Facility.

There are five Dimensions available for setting customized Pay Rates:

- **Status:** Allows the pay rate to be set by the status of the dictation or transcription in the workflow. Status options are:
  - Pending: this status are for dictations that have not yet have been transcribed. Pending is the typical status of most audio files prior to being transcribed.
  - QA: this is a transcription in the QA folder.
  - Rejected: this is a transcription in the Rejected folder.
  - Inbox: this is a transcription that has been completed and sent to the Dictator's Inbox.
  - Final: this is a transcription that has been moved from the Inbox to the Final folder.
  - Deleted: this is a transcription that has been deleted from the Portal' view.
- **Office:** Allows the pay rate to be set at the Office level. When "Office" is chosen as a Dimension, the drop down in the adjacent field populates with all Offices serviced by the Transcription Team.
- **Dictator:** Allows the pay rate to be set at the Dictator level. When "Dictator" is chosen as a Dimension, the drop down in the adjacent field populates with all Dictators serviced by the Transcription Team.
- **Report Type:** Allows the pay rate to be set at the Report Type level. When "Report Type" is chosen as a Dimension, the drop down in the adjacent field populates with all Report Types for all Dictators serviced by the Transcription Team.
- **Priority:** Allows the pay rate to be set at the Priority level. Priority is how much time the Transcription Team must transcribe and return the transcriptions to the Dictator and not be late. When "Priority" is chosen as a Dimension, the drop down in the adjacent field populates with all Priority levels available. Available Priority options are:
  - Standard: dictations have 24 hours to be transcribed
  - 1 hr STAT: dictations have one hour to be transcribed
  - 2 hr STAT: dictations have two hours to be transcribed
  - 4 hr STAT: dictations have four hours to be transcribed
  - 8 hr STAT: dictations have eight hours to be transcribed

- 12 hr STAT: dictations have twelve hours to be transcribed

#### Notes on Dimension Settings:

1. Dimensions can be single or multi-dimensional. For example:
  - a. A pay rate can be set for a specific Report Type that has a specific Priority.
  - b. A pay rate can be set for a specific Status (QA) for a specific Office.
  - c. A pay rate can be set for the Transcriptionist differently for each Office he/she transcribes for. And, a pay rate for the same Office can be set differently for each Transcriptionist typing for that Office.
2. Dimensions are used in conjunction with the “Rate Settings” (“Metric” and “Rate” as described in the below example and on pages 168) and with the “Line Settings” (described in the below example and on pages 170).

#### Rate Settings

The Rate Settings is comprised of two fields:

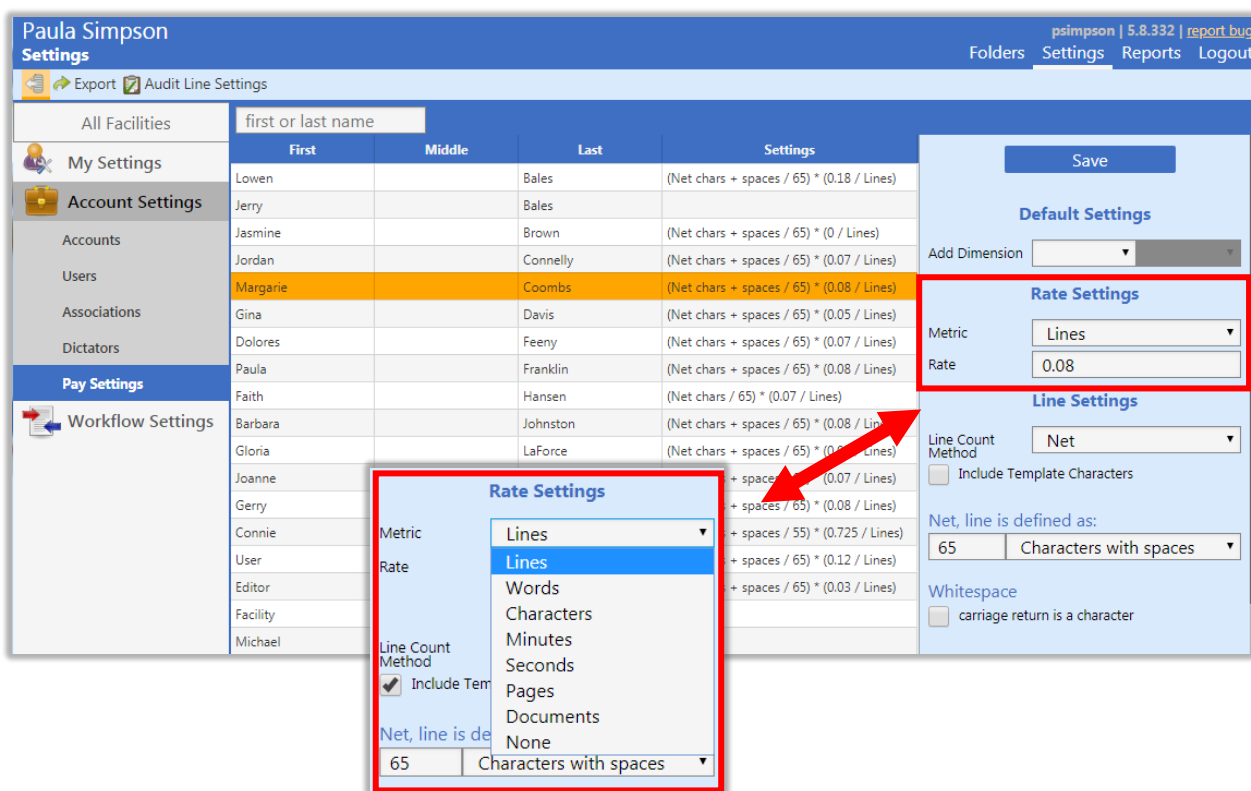
- Metric: defines the metric used to define the pay methodology.
- Rate: defines the monetary compensation amount associated with the metric.

#### Metric

Eight different metric options are available:

- Lines: A “Line” is defined as a continuous string of words (and spaces if this option is enabled). A line is further defined in the “Line Settings” section can be defined in a variety of ways that gets detailed in the following “Line Settings” section.
- Words: A “Word” means a continuous string of characters that ends in a space or a punctuation mark such as periods, commas, etc.
- Characters: Individual characters can be defined as a metric.
- Minutes: The number of minutes of the audio dictation can be defined as a metric.
- Seconds: The number of seconds of the audio dictation can be defined as a metric.

- Pages: The number of pages of a transcribed document, irrespective of how many characters are typed into it, can be defined as a metric.
- Documents: The transcribed document, irrespective of how many characters are typed into it, can be defined as a metric.
- None: Setting the metric to “None” disables the rate setting.



**Paula Simpson Settings**

psimpson | 5.8.332 | [report bug](#)

[Folders](#) [Settings](#) [Reports](#) [Logout](#)

[Export](#) [Audit Line Settings](#)

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

first or last name	First	Middle	Last	Settings
Lowen			Bales	(Net chars + spaces / 65) * (0.18 / Lines)
Jerry			Bales	(Net chars + spaces / 65) * (0 / Lines)
Jasmine			Brown	(Net chars + spaces / 65) * (0.07 / Lines)
Jordan			Connelly	(Net chars + spaces / 65) * (0.07 / Lines)
Margarie			Coombs	(Net chars + spaces / 65) * (0.08 / Lines)
Gina			Davis	(Net chars + spaces / 65) * (0.05 / Lines)
Dolores			Feeny	(Net chars + spaces / 65) * (0.07 / Lines)
Paula			Franklin	(Net chars + spaces / 65) * (0.08 / Lines)
Faith			Hansen	(Net chars / 65) * (0.07 / Lines)
Barbara			Johnston	(Net chars + spaces / 65) * (0.08 / Lines)
Gloria			LaForce	(Net chars + spaces / 65) * (0.08 / Lines)
Joanne				+ spaces / 65) * (0.07 / Lines)
Gerry				+ spaces / 65) * (0.08 / Lines)
Connie				+ spaces / 55) * (0.725 / Lines)
User				+ spaces / 65) * (0.12 / Lines)
Editor				+ spaces / 65) * (0.03 / Lines)
Facility				
Michael				

**Rate Settings**

Metric: **Lines**

Rate: **0.08**

**Line Settings**

Line Count Method: **Net**

☐ Include Template Characters

Net, line is defined as: **65** **Characters with spaces**

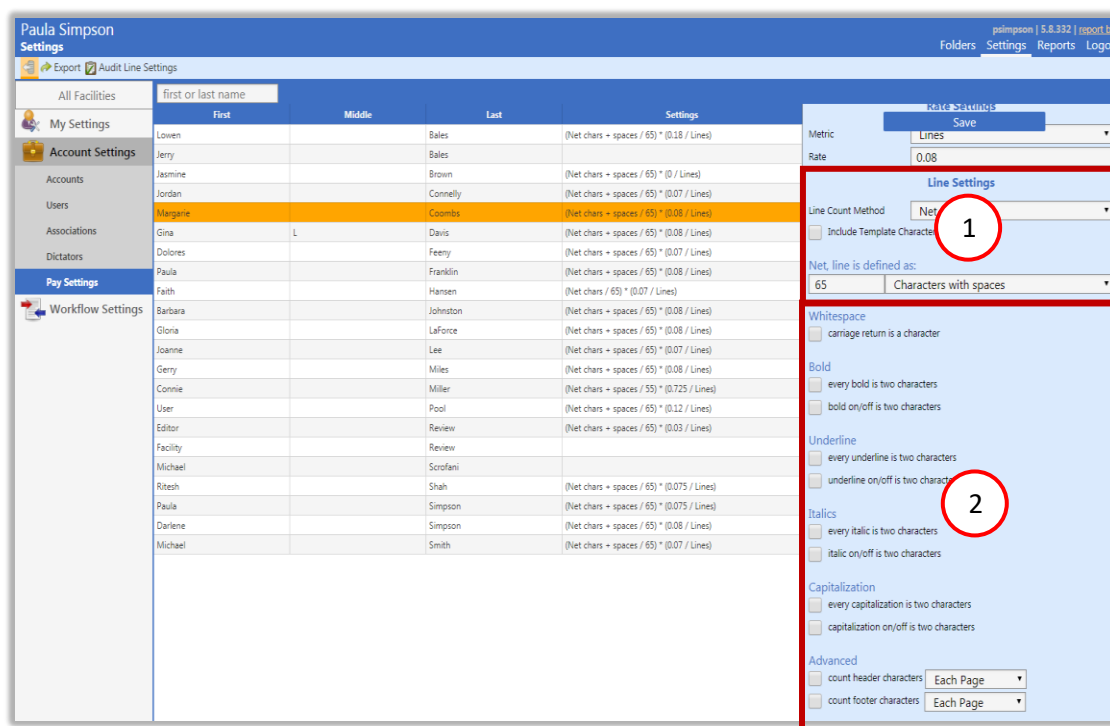
**Whitespace**

☐ carriage return is a character

## Rate

“Rate” defines the monetary compensation amount associated with the metric. While not shown as currency, the monetary system used in “Rate” is US Dollars. “Rate” is multiplied by the Metric used to calculate the pay amount due to Transcription Team member. In the image above, “0.08” is entered as the Rate. This means the Transcription Team member is paid \$.08, or 8 cents, per line.

## Line Settings



Paula Simpson  
Settings

Export Audit Line Settings

All Facilities first or last name

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

First	Middle	Last	Settings
Lowen		Bales	(Net chars + spaces / 65) * (0.18 / Lines)
Jerry		Bales	(Net chars + spaces / 65) * (0 / Lines)
Jasmine		Brown	(Net chars + spaces / 65) * (0.07 / Lines)
Jordan		Connelly	(Net chars + spaces / 65) * (0.07 / Lines)
Margerie		Coombs	(Net chars + spaces / 65) * (0.08 / Lines)
Gina	L	Davis	(Net chars + spaces / 65) * (0.08 / Lines)
Dolores		Feeny	(Net chars + spaces / 65) * (0.07 / Lines)
Paula		Franklin	(Net chars + spaces / 65) * (0.08 / Lines)
Faith		Hansen	(Net chars + spaces / 65) * (0.07 / Lines)
Barbara		Johnston	(Net chars + spaces / 65) * (0.08 / Lines)
Gloria		LaForce	(Net chars + spaces / 65) * (0.08 / Lines)
Joanne		Lee	(Net chars + spaces / 65) * (0.07 / Lines)
Gerry		Miles	(Net chars + spaces / 65) * (0.08 / Lines)
Connie		Miller	(Net chars + spaces / 65) * (0.725 / Lines)
User		Pool	(Net chars + spaces / 65) * (0.12 / Lines)
Editor		Review	(Net chars + spaces / 65) * (0.03 / Lines)
Facility		Review	
Michael		Scrofani	
Ritesh		Shah	(Net chars + spaces / 65) * (0.075 / Lines)
Paula		Simpson	(Net chars + spaces / 65) * (0.075 / Lines)
Darlene		Simpson	(Net chars + spaces / 65) * (0.08 / Lines)
Michael		Smith	(Net chars + spaces / 65) * (0.07 / Lines)

Line Settings

Line Count Method: Net

Include Template Characters: ☐

Net line is defined as: 65 Characters with spaces

Whitespace

carriage return is a character: ☐

Bold

every bold is two characters: ☐

bold on/off is two characters: ☐

Underline

every underline is two characters: ☐

underline on/off is two characters: ☐

Italics

every italic is two characters: ☐

italic on/off is two characters: ☐

Capitalization

every capitalization is two characters: ☐

capitalization on/off is two characters: ☐

Advanced

count header characters: Each Page

count footer characters: Each Page

The “Line Settings” section consists of two settings:

1 Line Count Method and Definition

2 Other Counting Options

### Line Count Method and Definition

“Line Count Method” defines the methodology used to count transcription. Four different line count methodologies are available:

- Black Character
- ASCII
- Gross
- Net

### *Black Character*

Also referred to as Visual Black Character, or VBC, Black character counts are any visible mark on a page of any color, including punctuation, headers, footers, and template characters. Spaces are not counted, and other work effort keys such as tab, space bar, function keys, etc. are also not counted. Special character treatments (bold, underline, italics, font changes) are not counted. VBC counting can be set at the character level, or at the line level when used in conjunction with a defined line length. For a detailed analysis of black character methodology, see

[https://cdn.ymaws.com/ahdionline.site-ym.com/resource/resmgr/WhitePapers/VBC\\_StandardUnitOfMeasure.pdf](https://cdn.ymaws.com/ahdionline.site-ym.com/resource/resmgr/WhitePapers/VBC_StandardUnitOfMeasure.pdf)

#### Line Length

If “Line” is selected as the Metric, the free text field “Black, line is defined as” sets the number of characters in a line. (if “Character” is selected as the Metric, “Line Length” should not be populated).

### *ASCII*

ASCII (American Standard Code for Information Interchange), is a set of digital codes representing letters, numerals, and other symbols, that is widely used as a standard format in the transfer of text between computers. Most work effort keys such as tab, space bar, function keys, etc. are included in the ASCII table. Special character treatments (bold, underline, italics, font changes) are not counted. For access to the ASCII table and more information see

<https://en.wikipedia.org/wiki/ASCII>.

#### Line Length

If “Line” is selected as the Metric, the free text field “ASCII, line defined as” sets the number of characters in a line. (if “Character” is selected as the Metric, “Line Length” should not be populated).

### *Gross*

Gross counts lines with or without visible characters appearing on a line, as in the case of the use of the enter key to create a line. Gross line counts produce whole numbers when counting lines, whereas Net lines are counted to the second decimal.

Settings options for defining a Gross line are:

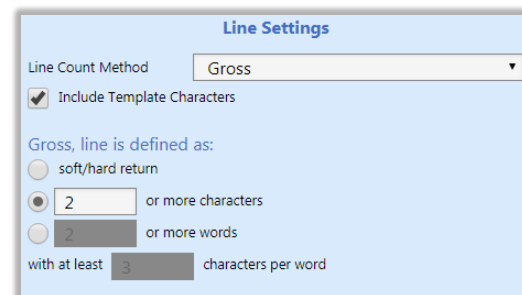
#### Line Length

The section “Gross, line defined as” contains three options:

- Soft/Hard Return
- ( ) or More Characters
- ( ) or More Words With at least ( ) characters per word

## Soft/Hard Return

A soft return is the creation of a line via a word wrap forced by the right-side margin setting. Soft returns allow you to continue typing without having to press the Enter key manually at the end of each line. A hard return is the creation of a line by pressing an enter key, regardless of the cursor's current position to the right-side margin.



The screenshot shows the 'Line Settings' dialog box. The 'Line Count Method' is set to 'Gross'. The 'Include Template Characters' checkbox is checked. Under 'Gross, line is defined as:', the 'soft/hard return' radio button is selected. The 'or more characters' field is set to 2. The 'or more words' field is set to 2. The 'with at least' field is set to 3 characters per word.

## ( ) or More Characters

This setting allows for a line to be counted based on a minimum number of visible characters.

## ( ) or More Words

This setting allows for a line to be counted based on a minimum number of words. Single letters like "A" are not considered a word.

## With at Least

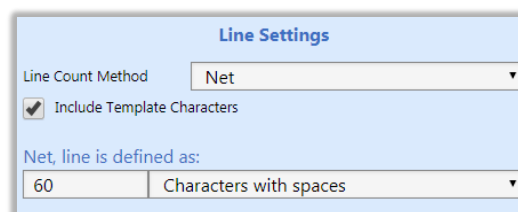
This setting allows for the minimum number of characters that must be present for a word to be counted.

## Net

A net line is counted only when a specified number of characters (and if selected, spaces) are counted. Options for Net line count settings are:

## Line Length

The free text field "Net, line is defined as" sets the number of characters in a line.



The screenshot shows the 'Line Settings' dialog box. The 'Line Count Method' is set to 'Net'. The 'Include Template Characters' checkbox is checked. Under 'Net, line is defined as:', the '60' is entered in the text field and 'Characters with spaces' is selected in the dropdown menu.

## Spaces Setting

The adjacent dropdown allows for lines to be defined either with spaces counted ("characters with spaces") or not ("characters without spaces").

## "Include Template Characters"

When checked, all characters that appear on the template as it appears in the Template Manager will be counted.



## Other Counting Options

### Whitespace

When checked, this option counts the enter key (carriage return) as a character.

### Bold, Underline, Italics, Capitalization

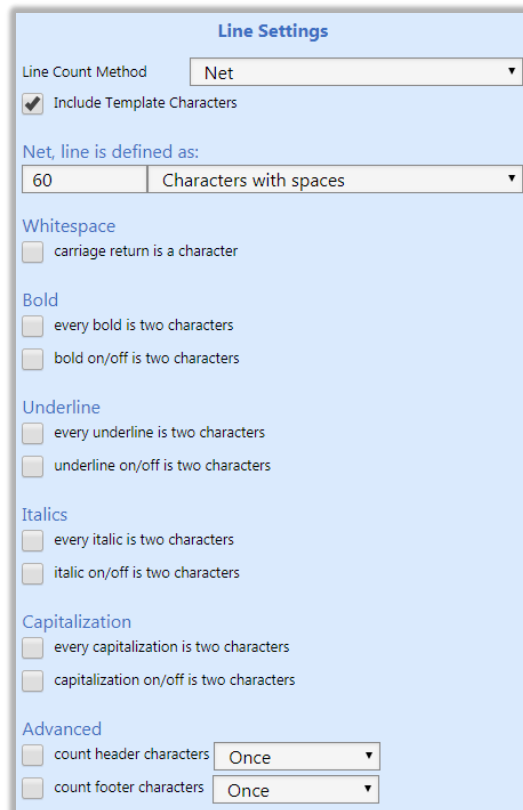
Each of these special character treatments have two options:

1. Every (bold/underline/italic/capitalization) is counted as two characters.
2. (bold/underline/italic/capitalization) on/off is two characters. To be clear, this setting when applied counts two characters to the first character when entering into a special character treatment, and two characters to the last character when entering into a special character treatment.

### Advanced

The advanced counting option counts characters that appear in headers and footers of documents. Three counting options are available for both header and footer characters:

1. "Once". Characters are counted in the header and/or footer on the first page, but not on any succeeding pages.
2. "On Change". Characters are counted in the header and/or footer if they change.
3. "Each Page". Characters are counted in the header and/or footer on all pages.

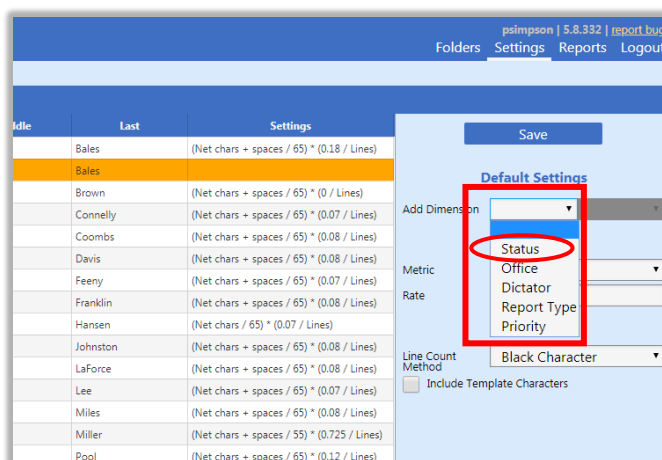


## Pay Settings Management

Dimensions can be created, edited or removed as needed.

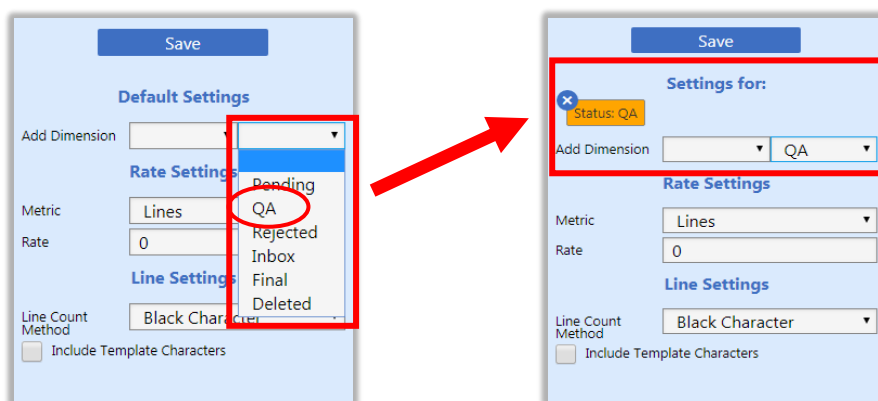
### Create a Pay Setting with One Dimension

1. Select the desired Dimension from the first (left side) drop-down. In the example below, "Status" is selected.



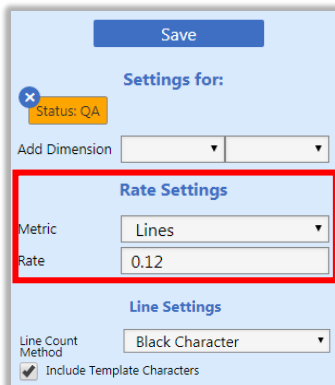
The screenshot shows the 'Pay Settings Management' interface. On the left, there is a table with columns 'Id', 'Last', and 'Settings'. The 'Last' column lists various names, and the 'Settings' column shows formulas like '(Net chars + spaces / 65) \* (0.18 / Lines)'. On the right, there is a 'Default Settings' panel. The 'Add Dimension' dropdown is open, and 'Status' is selected. Other options in the dropdown include Office, Dictator, Report Type, and Priority. The 'Metric' dropdown is set to 'Lines', and the 'Rate' is set to '0'. The 'Line Count Method' is set to 'Black Character', and the 'Include Template Characters' checkbox is unchecked.

2. Once a Dimension has been selected, click the desired Attribute within the second (right side) drop-down. In the example below, "QA" is the selected Attribute. Once created, the Attribute appears as a "tag" in the space shown below.



The image shows two screenshots of the 'Pay Settings Management' interface. The left screenshot shows the 'Default Settings' panel with the 'Add Dimension' dropdown open, and 'QA' is selected. The right screenshot shows the 'Settings for: Status: QA' panel. The 'Add Dimension' dropdown is now closed, and 'QA' is displayed next to it. The 'Metric' dropdown is set to 'Lines', and the 'Rate' is set to '0'. The 'Line Count Method' is set to 'Black Character', and the 'Include Template Characters' checkbox is unchecked. A red arrow points from the 'QA' selection in the left screenshot to the 'QA' tag in the right screenshot.

- Set the “Metric” and “Rate” under Rate Settings. In the example below, “Lines” is the selected Metric and a rate of “0.12” is set for Rate (12 cents).



Save

Settings for:

Status: QA

Add Dimension

**Rate Settings**

Metric: Lines

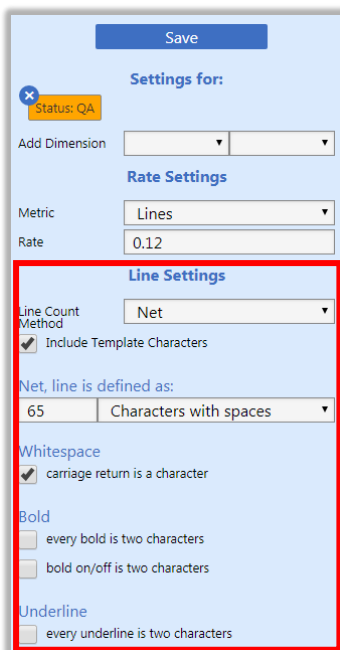
Rate: 0.12

**Line Settings**

Line Count Method: Black Character

☒ Include Template Characters

- Set the “Line Setting”. In the example below, “Net” is the selected Line Count Method, 65 characters including spaces and counting carriage as a character are selected.



Save

Settings for:

Status: QA

Add Dimension

**Rate Settings**

Metric: Lines

Rate: 0.12

**Line Settings**

Line Count Method: Net

☒ Include Template Characters

Net, line is defined as:

65 Characters with spaces

**Whitespace**

☒ carriage return is a character

**Bold**

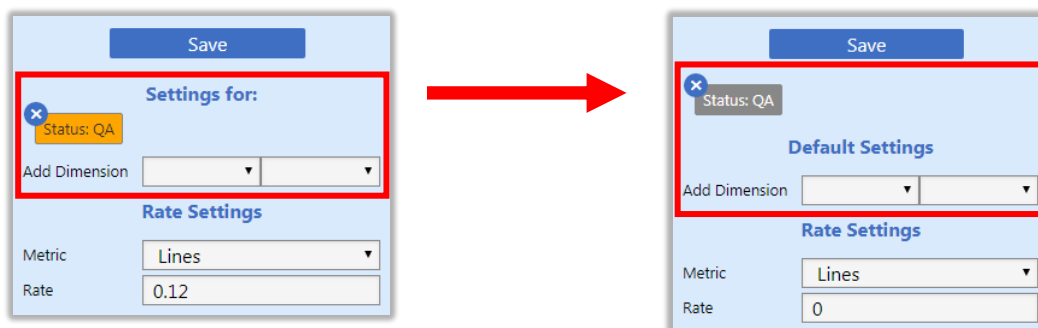
☐ every bold is two characters

☐ bold on/off is two characters

**Underline**

☐ every underline is two characters

- Click the “Save” button to save the Dimension. This saves the pay rate and the settings tied to the Dimension. The tag turns from gold to gray, confirming save has completed (below).



### Create a Pay Setting with Multiple Dimensions

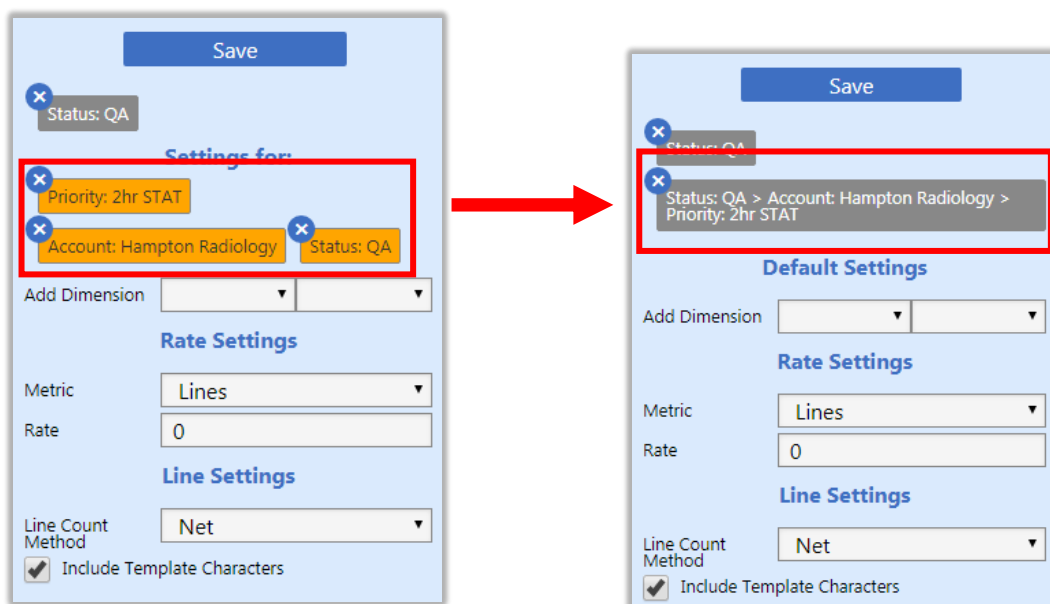
In the simple Dimensions example, only “Status” Dimension was chosen and its “QA” Attribute was selected. But Dimensions can be created to cover more complicated Pay Rate Scenarios. In this example, a Pay Rate needs to be created that meets the following needs:

- Status is QA
- Facility is Hampton Radiology
- Priority is 2 hr STAT

To Create a Pay Setting with Multiple Dimensions, the same sequence of steps is basically the same, but includes one major difference when selecting the Dimensions. Let’s , as follows:

1. Step 1: select the Dimensions one by one using the Dimension drop down. In the example at right:
  - a. the “Priority” Dimension was selected from the left drop down and “2hr STAT” was selected from the right drop down.
  - b. The “Account” Dimension was selected from the left drop down and “Hampton Radiology” was selected from the right drop down.
  - c. The “Status” Dimension was selected from the left drop down and “QA” was selected from the right drop down.
2. Step 2: After selecting multiple Dimensions, set the Metric, Rate and Line Settings options.
3. Click the “Save” button to save this Pay Rate setting as a multiple Dimension settings.

Once saved, the Dimensions merged into one consolidated tag with a “>” symbol separating each Dimension (see below), and the tag turns from gold to gray.



## Edit Pay Settings

To edit an existing dimension settings:

1. Click the Dimension tag to be edited. The tag turns gold to indicate it has been selected. Settings related to the selected Dimension load into the Details Panel.
2. Make the changes as required.
3. Click the “Save” button.

## Delete Pay Settings

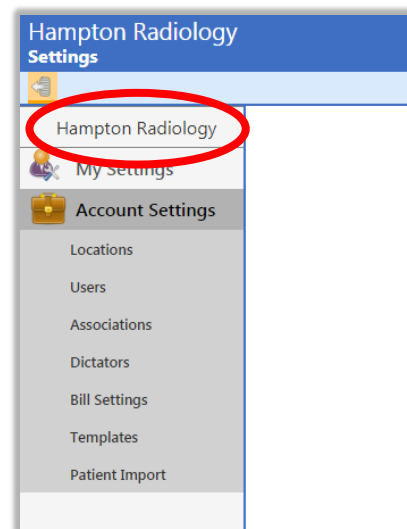
To delete a Dimension, click the blue “x” in the top left edge of the tag. The tag is removed from the Details Panel.

## Named Facility functions

The term “Named Facility” refers to the Accounts serviced by the Transcription Organization. Any Accounts that display in the drop down that displays in the top-left corner of the Folder View are the Named Entities.

When a Named Facility is selected from the drop down, some of the functional areas that display under the “Account Settings” change. The functional areas that appear are:

- Locations
- Users
- Associations
- Dictators
- Bill Settings
- Templates
- Patient Import



## Locations


Facilities sometimes have more than one location. In such situations, multiple locations can be added to the same Facility via the “Locations” area in the Folder Pane for a Named Facility.

When multiple locations are present, Dictators can be given permission to access dictations and transcriptions for all locations, while Facility staff can be restricted to only access dictations and transcriptions for their own location.

The “Default” Location is the primary location created when the Facility is first registered or added as a new account and is assigned to all Dictators and users if no additional Locations are created.

The Locations feature is used in conjunction with the call-in dictation system, where Dictators enter a code ID that corresponds with the Location. This attaches an ID to the dictation that identifies it as belonging to the selected Location.

In the below example, the selected Location named “Atrium” has a Location ID Code of “2”. That code, along with any other location codes, are listed on the call-in dictation instruction sheet for the Dictator’s reference. Once the Dictator presses “2” when prompted for the location code, the dictation gets assigned to the Atrium location. Any Facility staff at that location will have access to the completed transcription, while users at other locations (such as Southside, see below) will not.



Name ▼	Code
Atrium	2
Default	1
Southside	4
Uptown	3

Save New

Name: Atrium

Code: 2

#### Notes on Location:

1. If a Dictator mistakenly presses the wrong Location ID, the Location ID cannot be manually changed. Please contact the helpdesk for assistance.
2. If a Location ID is not assigned to a dictation, the Location ID cannot be manually added to the dictation. Please contact the helpdesk for assistance.
3. Please contact WebChartMD Support Team for changing the Location from “Default” to a named Location and vice versa.

#### Location Management

To add a new Location to a Facility:

1. click on the “New” button in the Details Panel. This creates a new placeholder row highlighted in gold (below).
2. Enter the name of this new Location in the “Name” field in the Details Panel, and add a numeric value representing the new Location in the “Code” field.
3. Click the “Save” button to create the new Location.

Name ▼	Code
Atrium	2
Default	1
Southside	4
Uptown	3

Save New
  
Name 
  
Code

### Edit Location

To edit an existing Location:

1. Select it in the Users Section so it highlights in gold.
2. Edit the Name and/or Code field and click “Save” to save the changes to the Location.

Name ▼	Code
Atrium	2
Default	1
Southside	4
Uptown	3

Save New
  
Name 
  
Code

Note: To delete a Location, please contact WebChartMD Support Team.



## Users

The “Users” section under the “Named Facility” dropdown is used to add and manage Facility users.

### *Folder Management Functions*

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

- Export
- Re-send Invite Email

#### 1 Export

A detailed description of “Exports” is found on page 131, in the Users section under the “All Facilities” section.

#### 2 Re-send Invite Email

A detailed description of “Re-send Invite Email” is found on page 132, in the Users section under the “All Facilities” section.

### *The User Details Panel*

The “User Details” panel has five sections:

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

#### 2 User Details: contains identifiers related to the user.

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



## User Details

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## Roles

Roles available include:

### Dictator

The “Dictator” role is assigned to any team member that dictates audio files to be transcribed. Typically, this is a healthcare provider who is the person at the point of care, and who dictates the patient encounter for documentation purposes.

### Office Manager

The “Office Manager” role is an administrative position with administrative oversight of the workflow within WebChartMD. Typically, the Office Manager is given permissions to many if not all of the Access and Actions Permissions in the Detail Panel. Office Managers have access to the “Reports” area by default.

### Office Staff

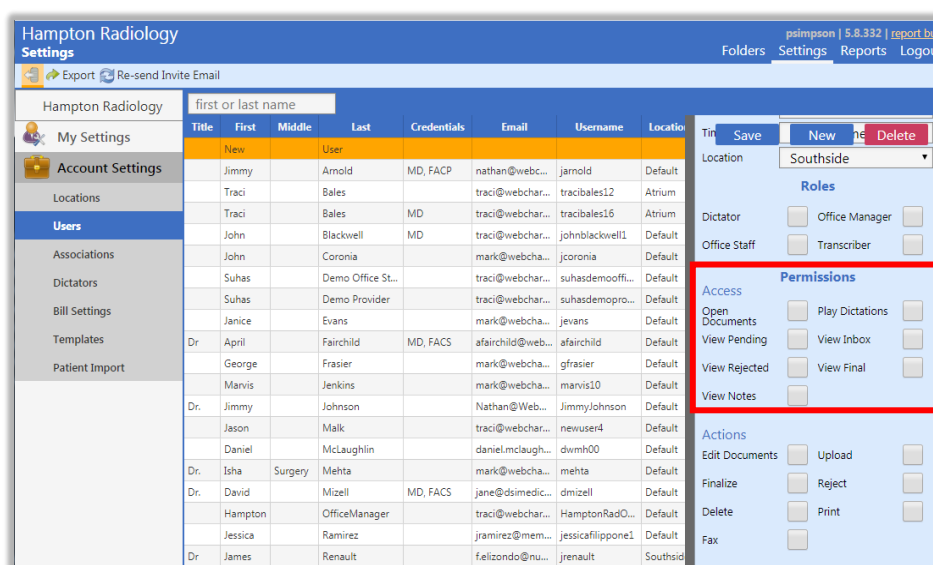
The “Office Staff” role is used to give certain Facility team members a more limited set of permissions. For example, a front desk staff person may be given the permission “Open Documents” in the Access area but not “Edit Documents” in the Actions area.

### Transcriptionist

The “Transcriptionist” is for any in-house Transcriptionists at a Facility who work alongside of the Transcription Team in a transcribing capacity.

## Permissions

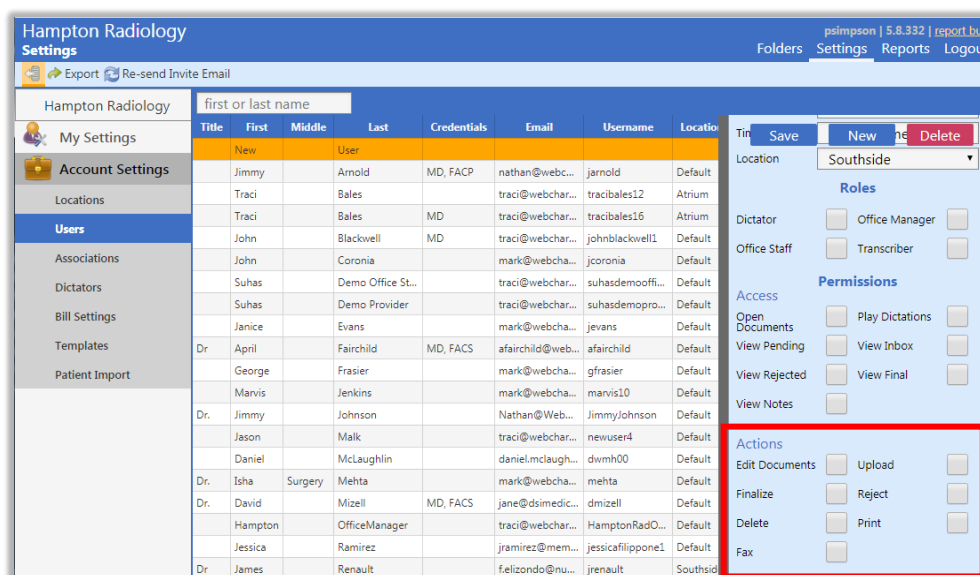
Permissions are divided into two sections – “Access” permissions and “Actions” permissions.



The screenshot shows the 'Hampton Radiology' Settings page. On the left is a sidebar with navigation links: My Settings, Account Settings, Locations, Users, Associations, Dictators, Bill Settings, Templates, and Patient Import. The main area displays a table of users with columns: Title, First, Middle, Last, Credentials, Email, Username, and Location. The 'Users' section is active, showing a list of users including Jimmy Arnold, Traci Bales, John Blackwell, John Corona, Suhas Demo Office St..., Suhas Demo Provider, Janice Evans, Dr. April Fairchild, George Frasier, Marvis Jenkins, Dr. Jimmy Johnson, Jason Malk, Daniel McLaughlin, Dr. Isha Mehta, Dr. David Mizell, Hampton OfficeManager, Jessica Ramirez, and Dr. James Renault. On the right, the 'Roles' panel is visible, showing checkboxes for Dictator, Office Manager, and Office Staff. Below this, the 'Permissions' section is highlighted with a red box, containing two sub-sections: 'Access' (Open Documents, View Pending, View Rejected, View Notes) and 'Actions' (Edit Documents, Finalize, Delete, Fax). Each permission has a checkbox and a 'New' button.

## Access

- **Open Documents:** This permission allows transcriptions to be opened. If this permission is not given, the “Open” button in Folders views toolbars is removed.
- **Play Dictations:** This permission allows audio files to be playable from the Portal. The “Play Audio” icon/function on the “Actions” column is available only if this permission is checked.
- **View Pending:** This permission allows the user to access the dictations in the Pending folder. A detailed description of the Pending folder can be found on page 80 in the All Documents section.
- **View Inbox:** This permission allows the user to access the transcriptions in the Inbox folder. A detailed description of the Inbox folder can be found on page 82 in the All Documents section.
- **View Rejected:** This permission allows the user to access the transcriptions in the Rejected folder. A detailed description of the Rejected folder can be found on page 88 in the All Documents section.
- **View Final:** This permission allows the user to access the transcriptions in the Final folder. A detailed description of the Final folder can be found on page 90 in the All Documents section.
- **View Notes:** This permission allows the Notes folder to be visible. If this permission is unchecked, the Notes folder is not visible.



Title	First	Middle	Last	Credentials	Email	Username	Location
New	User						
	Jimmy		Arnold	MD, FACP	nathan@webc...	jarnold	Default
	Traci		Bales		traci@webchar...	tracibales12	Atrium
	Traci		Bales	MD	traci@webchar...	tracibales16	Atrium
	John		Blackwell	MD	traci@webchar...	johnblackwell1	Default
	John		Coronia		mark@webcha...	jcoronia	Default
	Suhas		Demo Office St...		traci@webchar...	suhasdemooffi...	Default
	Suhas		Demo Provider		traci@webchar...	suhasdemopro...	Default
	Janice		Evans		mark@webcha...	jevans	Default
Dr	April		Fairchild	MD, FACS	afairchild@web...	afairchild	Default
	George		Frasier		mark@webcha...	gfrasier	Default
	Marvis		Jenkins		mark@webcha...	marvis10	Default
Dr.	Jimmy		Johnson		Nathan@Web...	JimmyJohnson	Default
	Jason		Malk		traci@webchar...	newuser4	Default
	Daniel		McLaughlin		daniel.mclaugh...	dwmh00	Default
Dr.	Isha	Surgery	Mehta		mark@webcha...	mehta	Default
Dr.	David		Mizell	MD, FACS	jane@dsimedic...	dmizell	Default
	Hampton		OfficeManager		traci@webchar...	HamptonRadO...	Default
	Jessica		Ramirez		jramirez@mem...	jessicafilipone1	Default
Dr	James		Renault		f.elizondo@nu...	jrenault	Southsid

## Actions

- **Edit Documents:** This allows the user to edit transcriptions. For more information about editing, please see page 98.
- **Upload:** This permission allows the user to upload dictations from the CP Upload software. The CP Upload software uses the handheld recorders to upload audio files.
- **Finalize:** This permission allows the user to Finalize transcriptions from the Dictator's Inbox folder and move them into the Final folder. To finalize a transcription:
  1. Click the transcription in the Inbox to select it.
  2. Press the "Finalize" button in the toolbar.
  3. When the "Confirm Finalize" pop-up box appears, click "Finalize" (or "Cancel" to cancel).
  4. Selected document(s) will move from the Inbox to the Final folder.
- **Reject:** This allows the user to reject dictations in the transcription workflow; to access the Rejected folder within the Folders view; and to edit and re-submit documents that have been rejected and are within the Rejected folder. For more information about rejecting, please see page 63.
- **Delete:** This allows the user to delete dictations and transcriptions from the workflow. For more information about deleting, please see page 34.
- **Print:** This allows the user to print transcriptions.
- **Fax:** This allows the user to fax transcriptions. For more information about faxing, please see page 85.
- **Create Draft:** when the "Dictator" Role is selected, an additional Permission appears, "Create Drafts".

## User Management

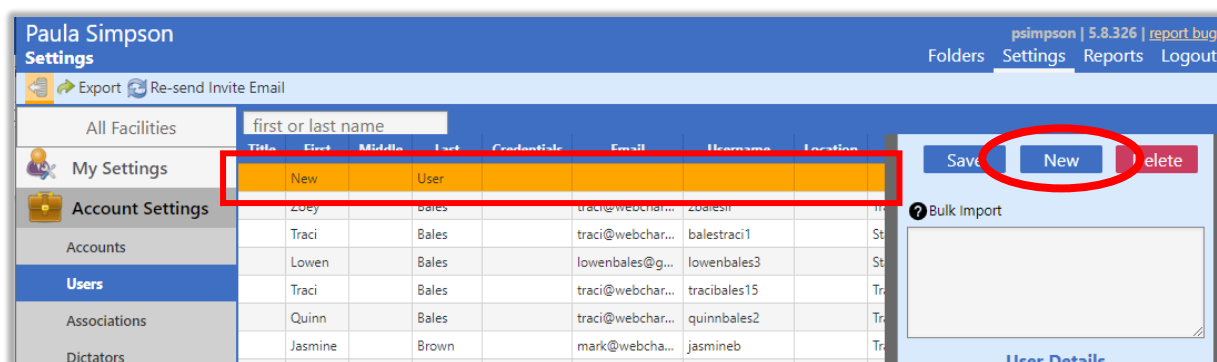
A number of functions related to Users are managed from the Users panel:

- Create User
- Edit User
- Delete User
- Bulk Create User

### Create User

To create a new user:

1. Click the “New” button in the User Details panel. This creates a new blank row identified initially as “New User” at the top of the User Section (see below).
2. Add user identifiers and set Role and all permissions as described in the above “User Details” section.



### Edit User

To edit an existing user:

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

Paula Simpson  
Settings

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Folders Settings Reports Logout

Export Re-send Invite Email

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Title	First	Middle	Last	Credentials	Email	Username
	Zoey		Bales		traci@webchar...	zbaleslr
	Lowen		Bales		lowenbales@g...	lowenbales3
	Quinn		Bales		traci@webchar...	quinnbales2
	Jasmine		Brown		mark@webcha...	jasmineb
	Jordan		Connelly		mark@webcha...	jordancon
	Margarie		Coombs		mark@webcha...	mcoombs
	Gina	L	Davis		mark@webcha...	gdavis
	Dolores		Feeny		mark@webcha...	dfeeny
	Paula		Franklin		traci@webchar...	pfranklin01
	Faith		Hansen		ritesh@webcha...	fhanzen
	Barbara		Johnston		traci@webchar...	bjohnston
	Sally		Jones		mark@webcha...	sallyjones
	Gloria		LaForce		traci@webchar...	glaforce
	Joanne		Lee		mark@webcha...	joannelee
	Gerry		Miles		traci@webchar...	gmiles
	Connie		Miller		Nathan@WebC...	conniemiller
	User		Pool		traci@webchar...	SYS@POOL-US...
	Editor		Review		traci@webchar...	QA_DMD
	Michael		Scrofani		mark@webcha...	mscrofani

Save New Delete

Bulk Import

User Details

Email \* traci@webchartmd.

Title

First name \* Quinn

Middle name

Last name \* Bales

Credentials

Phone / SMS

Fax

Timezone Eastern Time

## Delete User

To delete a user:

1. Click the row of the user to be edited. Row highlights in gold.
2. Press the "Delete" button.

Paula Simpson  
Settings

psimpson | 5.8.326 | [report bug](#)

Folders Settings Reports Logout

Export Re-send Invite Email

All Facilities

My Settings

Account Settings

Accounts

Users

Associations

Dictators

Pay Settings

Workflow Settings

Title	First	Middle	Last	Credentials	Email	Username	Location
	Zoey		Bales		traci@webchar...	zbaleslr	
	Lowen		Bales		lowenbales@g...	lowenbales3	
	Jasmine		Brown		mark@webcha...	jasmineb	
	Jordan		Connelly		mark@webcha...	jordancon	
	Margarie		Coombs		mark@webcha...	mcoombs	
	Gina	L	Davis		mark@webcha...	gdavis	
	Dolores		Feeny		mark@webcha...	dfeeny	
	Paula		Franklin		traci@webchar...	pfranklin01	
	Faith		Hansen		ritesh@webcha...	fhanzen	
	Barbara		Johnston		traci@webchar...	bjohnston	
	Sally		Jones		mark@webcha...	sallyjones	
	Gloria		LaForce		traci@webchar...	glaforce	
	Joanne		Lee		mark@webcha...	joannelee	
	Gerry		Miles		traci@webchar...	gmiles	
	Connie		Miller		Nathan@Web...	conniemiller	

Save New Delete

Bulk Import

User Details

Email \* mark@webchartmd.com

Title

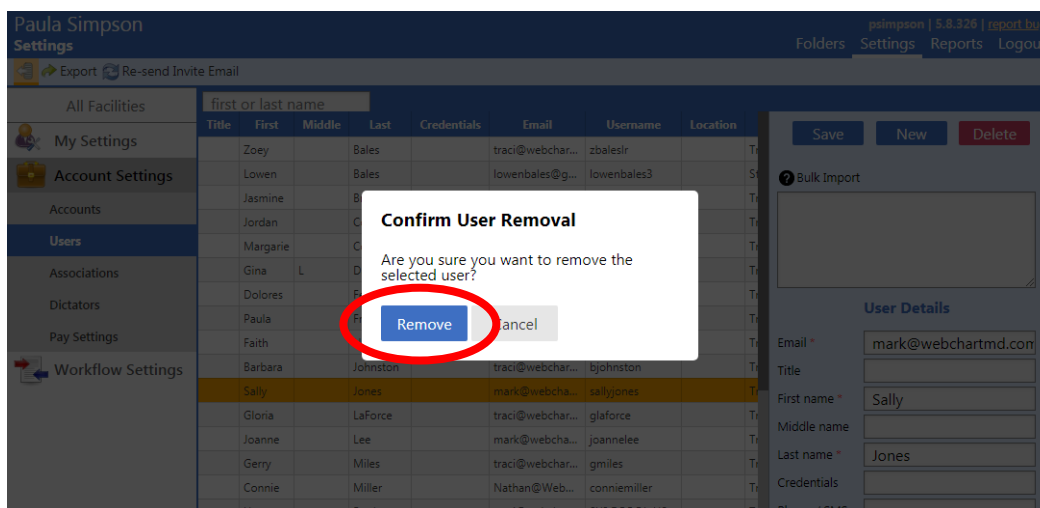
First name \* Sally

Middle name

Last name \* Jones

Credentials

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



#### Notes on Delete feature:

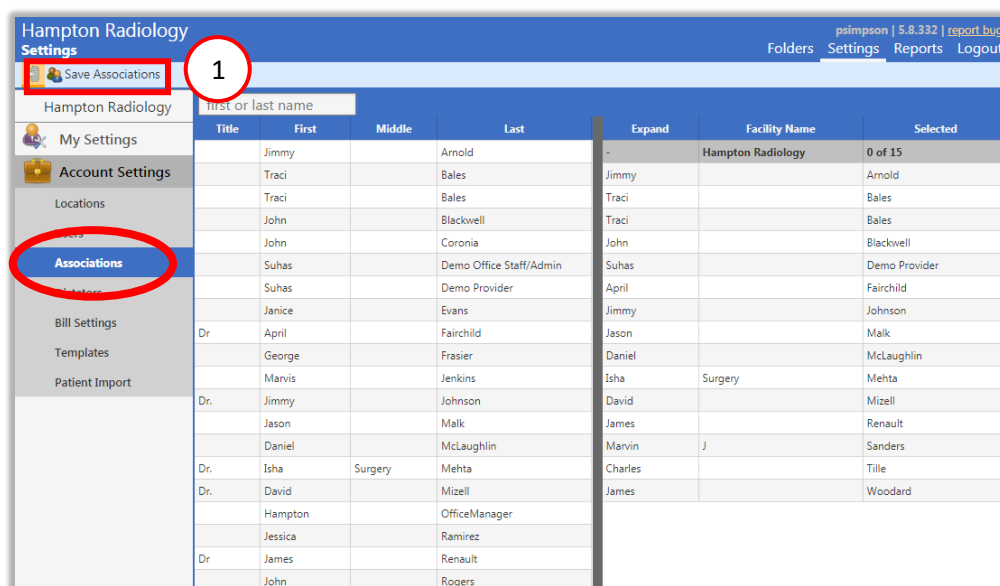
1. When Dictators are deleted, any dictations and transcriptions related to the Dictator are removed from screen but retained in the database. To purge dictations and transcriptions from WebChartMD, contact the helpdesk.
2. Users accidentally deleted from an account can be restored. Contact the helpdesk for assistance.



## Associations

The Associations screen is used to enable and disable a user's access to dictations and transcriptions for Dictators at the Facility.

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



### Folder Management Function

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

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

### Managing Associations

A detailed description of adding and removing Associations for users is found on page 149, in the Associations section under the “All Facilities” section. Use these same steps to create, manage and remove Associations between a Facility user and a Dictator.

## Dictators

A detailed description of all settings options in the “Dictators” screen is found in the Users section under the “All Facilities” section on page 154. Follow the steps listed in that section to manage Dictator settings.

Note on Dictators section:

1. When “All Facilities” is selected in the dropdown, the Users Details section shows all Dictators for all Facilities serviced by the Transcription Team. When a named Facility is selected in the dropdown, only Dictators at that Facility are displayed.

## Bill Settings

Bill Settings is used to set the line count methodology and the Bill Rates for each of the Dictators at the Named Facility. Dictators can be assigned multiple Bill rate settings as required by the Transcription Organization’s agreement with the Facility. Examples would be:

- One Bill rate for standard TAT but a different bill rate for STAT files.
- One Bill rate for one work type but a different bill rate for another work type.

Note: The “Bill Settings” menu is replaced by “Pay Settings” when the dropdown is changed from a Named Facility to All Facilities.

A detailed description of “Dimensions, Rate Settings, Line Settings and line count options is found on page 166. Use those same steps to create and manage Bill Settings.

## Templates

A template, also referred to as a work type, is a pre-formatted document usually containing sections and subsections into which the Dictator's transcribed content will be placed by the Transcriptionist. Templates often include Facility-specific identification information (often found in the document header). An example of a typical template appears below:

CONNOR CHIROPRACTIC  
100 MAIN STREET  
LEWISTON, TN 37056  
TEL: 423-988-0110      FAX: 423-202-2001

**NAME:**  
**DOB:**  
**MRN:**

**PROGRESS NOTE**

**SUBJECTIVE:** Text here

**PHYSICAL EXAMINATION:** Text here

**DIAGNOSES:**  
1.  
2.

**TREATMENT PLAN:** Text here

James S. Doe, MD

JSD/mlt

D:            T:  
|

### *Creating Templates*

Templates in WebChartMD are created using Microsoft Word. WebChartMD uses the Bookmarks feature within Microsoft Word for loading and managing metadata within templates. For a full description of the template creation process, see Appendix 1, on page 245.

### *Folder Management Functions*

There are no Folder Management Function buttons in this section.

### *The User Details Panel*

The Fields laid out in the "Document Template" section are:

- **Template Name:** The name of the template is a free text field. The name given becomes the display name throughout the workflow on all screens and management reports.

- **Description:** Extra information that can be added to identify the template. This field is not visible to the Transcriptionist. It is only visible within the Portal.
- **Template File:** This field is used to upload the template into the Template Manager. It has a “Choose File” button and a field next to it. Clicking on the Choose File button launches a Windows Explorer allowing the user to browse to the template and upload it.
- **Phone Code:** This field works in conjunction with the call-in dictation system. Add the numeric identifier assigned to the template for call-in dictation purposes.
- **Default TAT:** This is a dropdown field that holds the six STAT options. This dropdown menu allows the template to have a default STAT priority assigned to it. More details on the priority details can be found on page 167.
- **Default Transcriptionist:** This is a dropdown menu that allows the template to have a default Transcriptionist assigned to it. **Default Pool:** This is a dropdown menu that allows the template to have a default Pool assigned to it. More details on the Pools can be found on page 213.
- **Bill Template Characters:** This is a dropdown menu that has three options:
  - **Inherit:** This uses the setting for Template characters for the Dictator.
  - **Include:** This includes the Template character count into the total Line Count.
  - **Exclude:** This excludes the Template character count into the total Line Count.
- **Pay Template Characters:** This is a dropdown menu that has three options:
  - **Inherit:** This uses the setting for Template characters for the Transcriptionist.
  - **Include:** This includes the Template character count into the total Line Count.
  - **Exclude:** This excludes the Template character count into the total Line Count.
- **Add Lines to Bill:** This field allows the user to add or subtract a fixed number of lines to the Bill Line count. For example, if a document has a line count of 20 lines and “5” has been entered in this field, the total Bill Line count becomes 25. If the document has a line count of 20 lines and “-5” is entered in this field, total Bill line count becomes 15.
- **Add Lines to Pay:** This field works identically to “Add Lines to Bill”, but for Pay Lines.
- **Add Lines % to Bill:** This field allows the user to add or subtract a percentage of lines to the Bill Line count. For example, if a document has a line count of 20 lines and “25” (i.e. 25%) has been entered in this field, the total Bill Line count becomes 25. If the document has a line count of 20 lines and “-25” is entered in this field, total Bill line count becomes 15.
- **All Lines % to Pay:** This field works identically to “Add Lines % to Bill”, but for Pay Lines.

- **Work type Text:** This field is used to enter specific text that is used by the interface to identify documents as they are imported into their systems. For more information please contact WebChartMD Support Helpdesk.
- **Interface Code 1:** this field is used when configuring HL7 interfaces. Contact the helpdesk for more information.
- **Interface Code 2:** this field is used when configuring HL7 interfaces. Contact the helpdesk for more information.

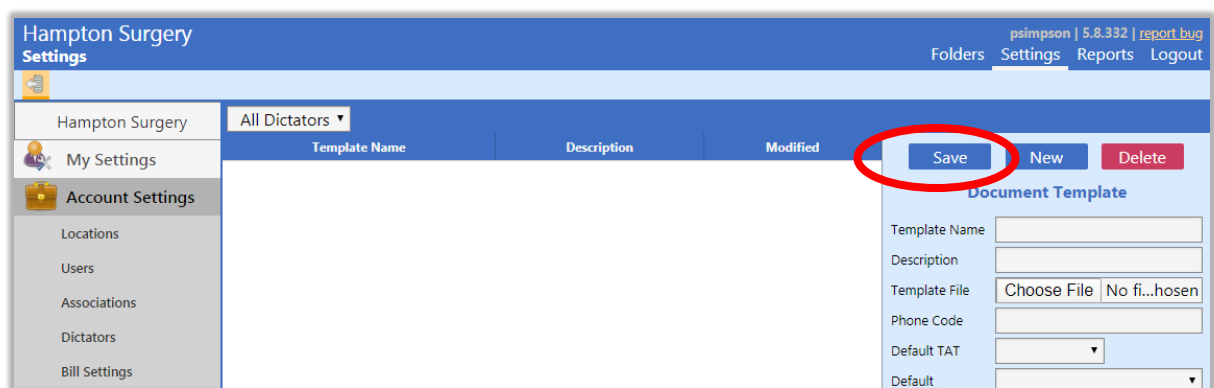
### Template Management

A number of functions related to Templates are managed from the Document Template panel:

- Upload Template
- Edit Template
- Delete Template

### Upload Template

1. Click the “New” button in the Document Template panel. This creates a new blank row on screen.
2. Click the “Choose File” button and browse to the template on the local computer.
3. Add information to the fields in the Document Template panel as described above.
4. Click “Save” to upload the template.

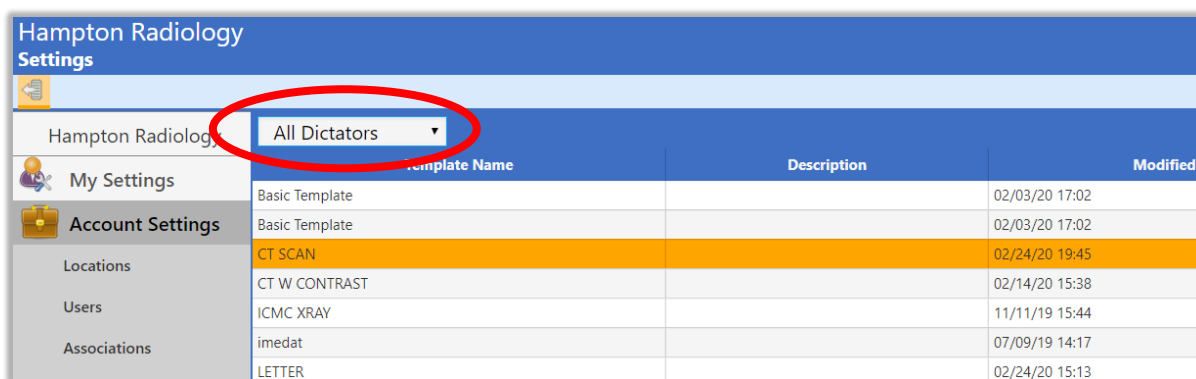


## Upload Group Template vs. Individual Dictator Template

Templates can be shared by all Dictators at the Facility, and/or Dictators can have Templates uploaded for their use only.

### Uploading Shared Templates

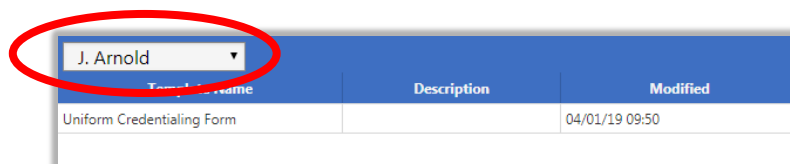
To upload a template that will be used by all Dictators at the Facility, set the drop-down in the top-left corner of the Templates screen to “All Dictators” (see below) and repeat the above steps for saving the Template.



Hampton Radiology Settings			
Hampton Radiology		All Dictators	
Template Name	Description	Modified	
Basic Template		02/03/20 17:02	
Basic Template		02/03/20 17:02	
CT SCAN		02/24/20 19:45	
CT W CONTRAST		02/14/20 15:38	
ICMC XRAY		11/11/19 15:44	
imedat		07/09/19 14:17	
LETTER		02/24/20 15:13	

### Uploading Individual Dictator Templates

To upload a template that will be used only by an individual Dictators at the Facility, set the drop-down in the top-left corner of the Templates screen to the Dictator’s name (see below) and repeat the above steps for saving the Template.



J. Arnold	Template Name	Description	Modified
	Uniform Credentialing Form		04/01/19 09:50

## Edit Template

Edits can be made to either the metadata and Settings for a Template in the Document Template panel, and/or the Template itself.

### Edit metadata and Settings

1. Click on the Template that needs to be edited so its details load into the User Details panel in the right side.
2. Edit the settings as needed.
3. Click “Save” to save the changes.

#### Edit Template

1. Double-click the row for the Template to be edited. The Template opens in Microsoft Word.
2. Made needed edits, and press “Save” (not Save-as) in Microsoft Word.
3. Press the “X” or use Close to close out of Template. Edits made are saved to the Template.

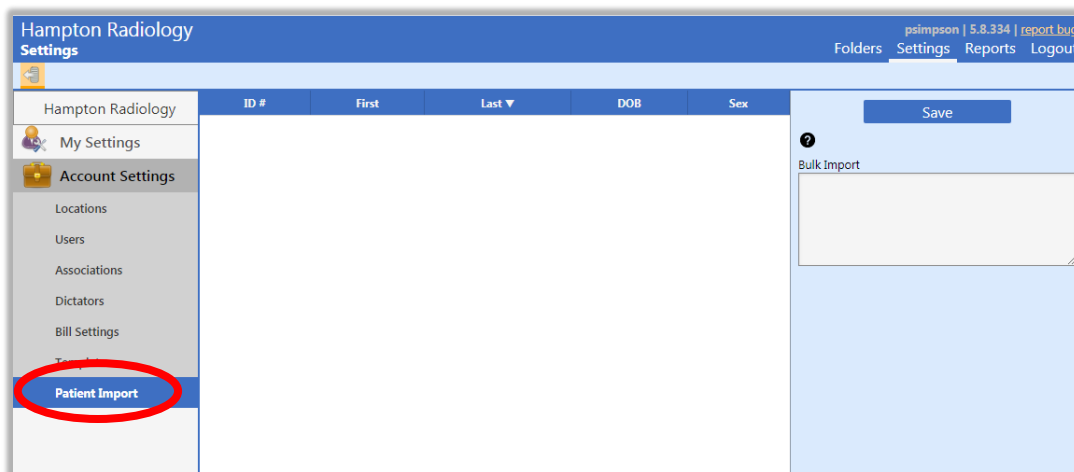
#### Delete Template

1. Click the Template to be deleted, Template name is highlighted in gold.
2. Click the “Delete” button in the Document Template panel.

#### Notes on Templates:

If a Template is deleted by mistake, please contact WebChartMD Support to restore the template.

## Patient Import

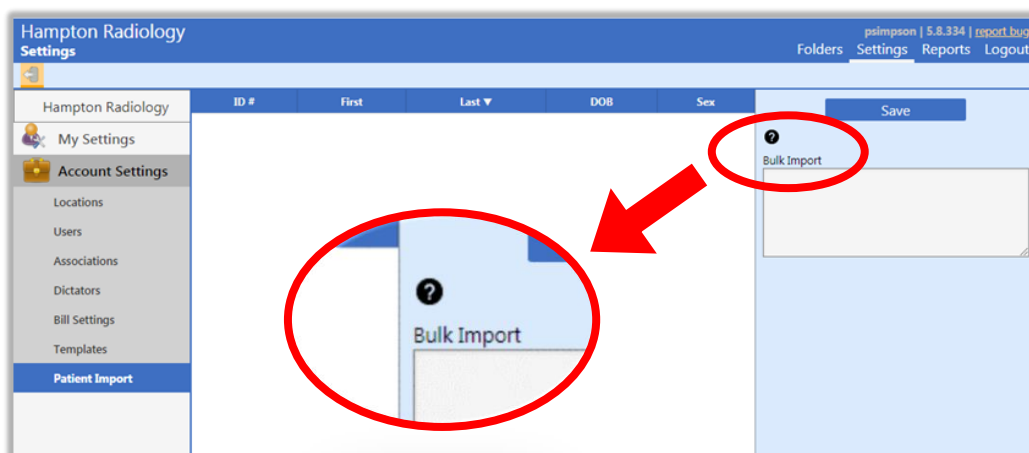


“Bulk Import” allows multiple patients (up to 500 at a time) to be added as users to a Facility.

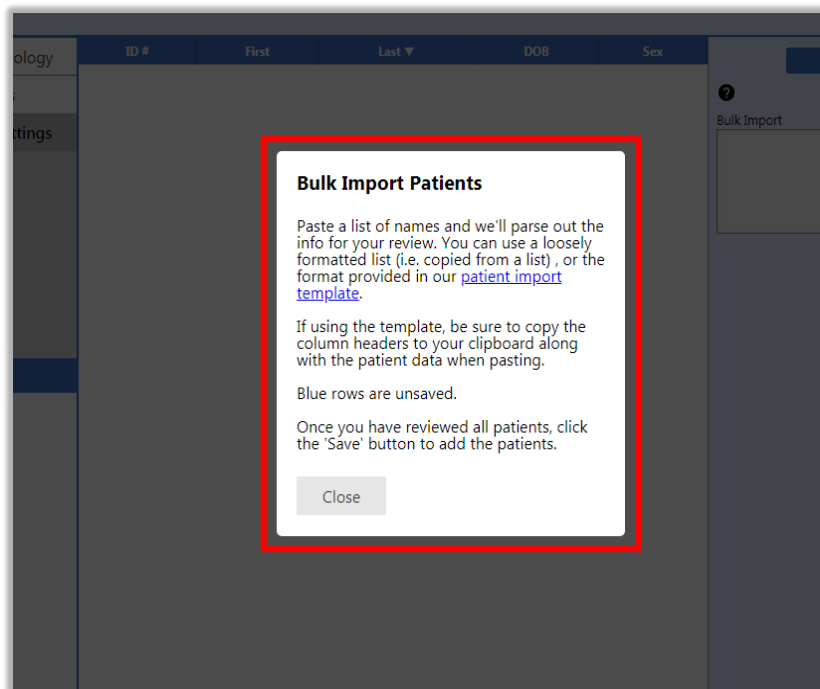
To use the “Bulk Import” feature:

### Step 1

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

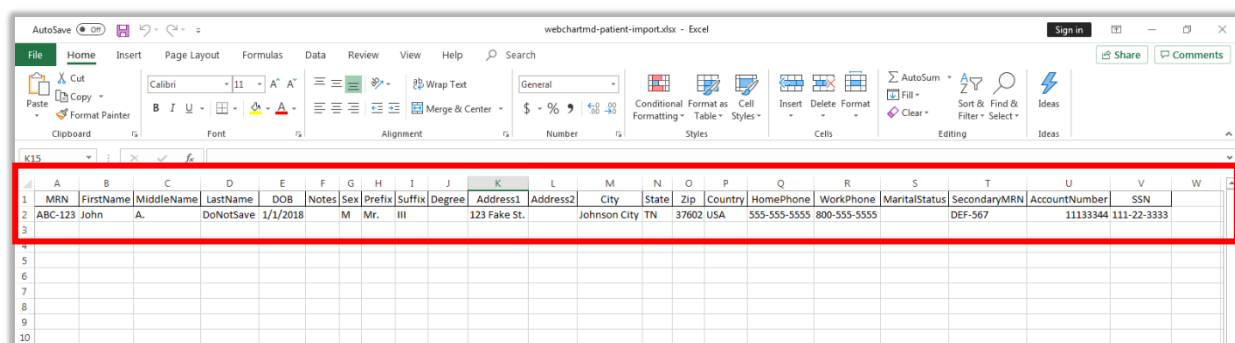






To download the template sample with available columns, click the “patient import template” link (above).

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

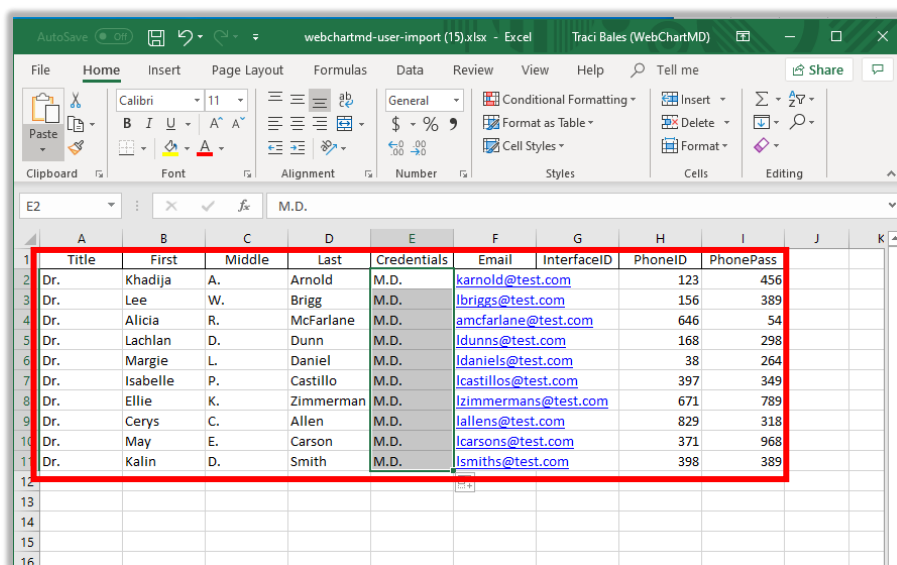


MRN	First Name	Middle Name	Last Name	DOB	Notes	Sex	Prefix	Suffix	Degree	Address1	Address2	City	State	Zip	Country	HomePhone	WorkPhone	MaritalStatus	SecondaryMRN	AccountNumber	SSN
ABC-123	John	A.	DoNotSave	1/1/2018		M	Mr.	III		123 Fake St.		Johnson City	TN	37602	USA	555-555-5555	800-555-5555		DEF-567	111333444	111-22-3333

## Step 2

Format your data sheet to match the column headers presented in the sample template sheet (above and below images) and use the “copy” feature in excel to copy the data to your clipboard. Please note:

Make sure to select and copy only those rows and columns that hold data required to be imported. Do not include blank rows or columns outside of those containing data to be imported.



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

### Step 3

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



Hampton Radiology Settings

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Folders Settings Reports Logout

Hampton Radiology

ID #	First	Last	DOB
22222	Chris	Alan	
11111	John	Doe	M
55555	Chris	Johnson	
44444	Susan	Kohls	
33333	Mandy	Smith	

My Settings

Account Settings

Locations

Users

Associations

Dictators

Bill Settings

Templates

Patient Import

Bulk Import

44444	Susan	Kohls	Chicago
Miss	4 Peter Lane		
IL	22568	USA	
55555	Chris	Johnson	Dallas
Mr.	17 Second St.		
63440	USA		

Save

## Step 4

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

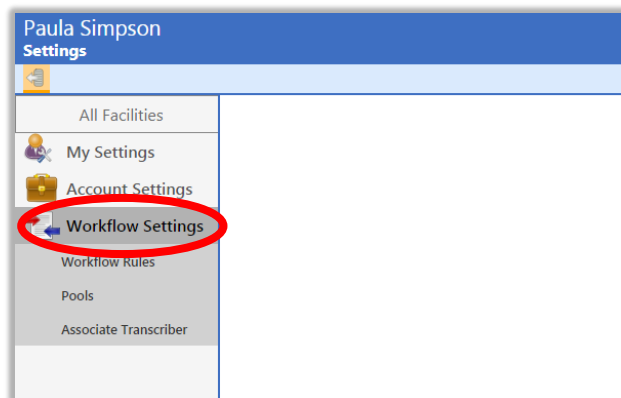


## Notes on Bulk Import:

1. Data will load into the database exactly as it is formatted on the excel sheet that is used for the bulk import. For example, if patient names are in “all caps” on the excel sheet, they will appear in “all caps” within WebChartMD and on any document that are processed through WebChartMD.
2. The order of the columns on the spreadsheet used to import data do not need to match those of the “user import template” sample provided. However, column names must match those provided in the “patient import template”.

## Workflow Settings

The “Workflow Settings” menu under the “All Facilities” dropdown provides routing rules that can be created to govern the flow of dictations and transcriptions through the workflow. These routing rules can be used to automate key decisions based on specific workflow needs.



The Workflow Settings has three options available under it:

- **Workflow Rules:** This section is used to create and manage rules that manage dictation and transcription workflow.
- **Pools:** This section is used to create and manage specific pools used in the workflow.
- **Associate Transcriptionist:** This section is used to add and remove specific Transcription Team members from pools.

### Workflow Rules

WebChartMD allows for “Rules” to be set up that govern how dictations and transcriptions will move through the workflow. These rules can be as specific or general as needed to meet the workflow requirement.

The Rules section works in combination with the Application section below it to create the desired workflow action. It can be thought of as an “if-then” statement, in which the Rules section defines the “if”, and the Application section defines the “then”. Another way to describe how the two sections work together is:

“If the set of conditions in the Rules section is met, then apply the settings in the Application section.”

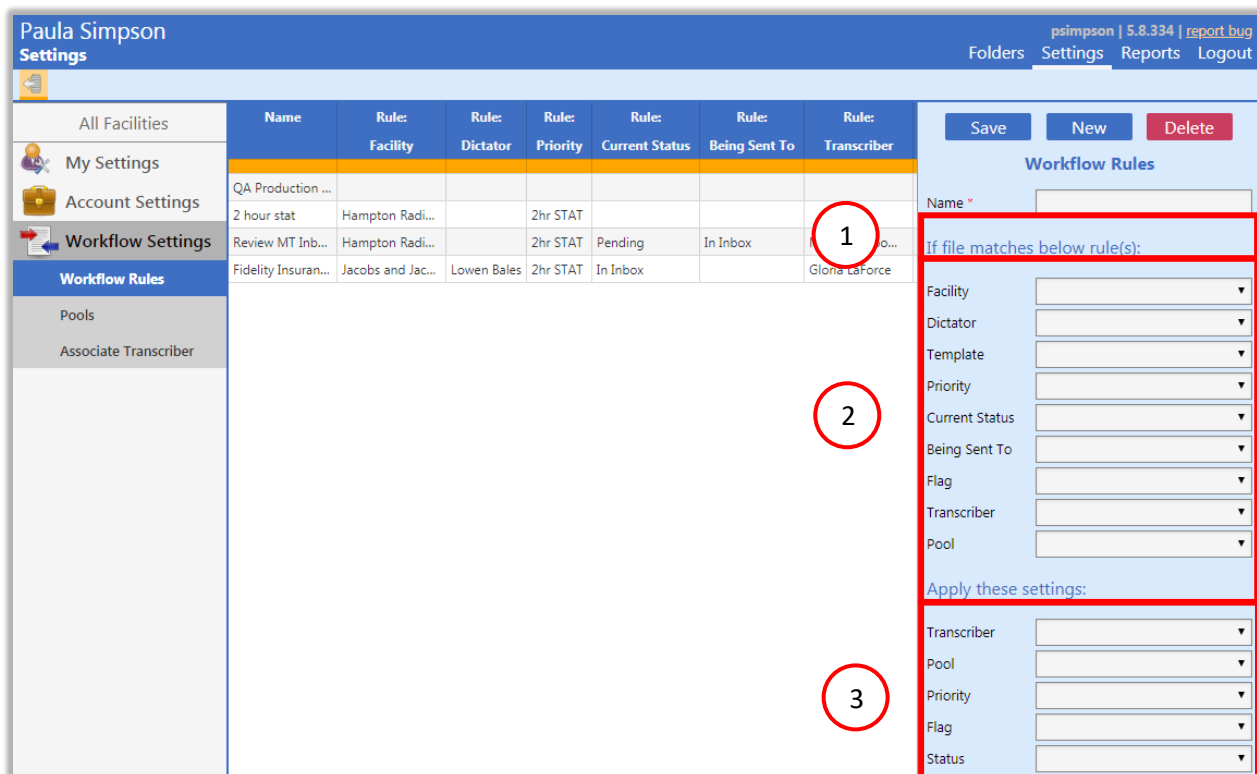
## Folder Management Functions

There are no Folder Management function buttons in the Workflow Settings toolbar.

## The Details Panel

The Details Panel can be divided into three sections:

- 1 Workflow Rules Name: This section holds the name of the Rule.
- 2 Rules: This section holds fields that are the objective of the Rule.
- 3 Application: This section defines the action to be applied if the rules created in the Rules section are matched.



**Paula Simpson Settings** | psimpson | 5.8.334 | [report bug](#)

**Workflow Rules**

Name	Rule: Facility	Rule: Dictator	Rule: Priority	Rule: Current Status	Rule: Being Sent To	Rule: Transcriber
QA Production ...						
2 hour stat	Hampton Radi...		2hr STAT			
Review MT Inb...	Hampton Radi...		2hr STAT	Pending	In Inbox	
Fidelity Insuran...	Jacobs and Jac...	Lowen Bales	2hr STAT	In Inbox		Gloria LaForce

**Workflow Rules Details Panel:**

**1 Name \***

**2 Rules:**

- Facility
- Dictator
- Template
- Priority
- Current Status
- Being Sent To
- Flag
- Transcriber
- Pool

**3 Application:**

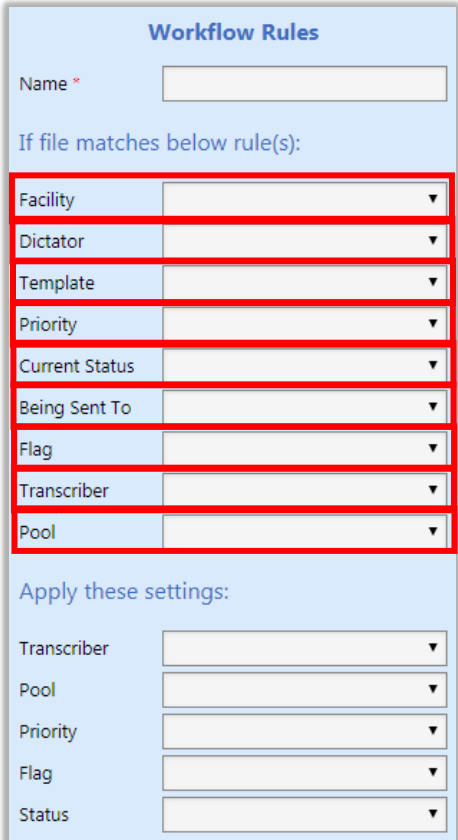
- Transcriber
- Pool
- Priority
- Flag
- Status

## Name

Enter the name of the rule being created in this free text field. The name should describe what the intent of the Rule is so it's easy to identify what the Rule does.

## Rules

The rules created can be as broad or as specific as needed. For example, a rule can be created at the Facility level, which would then apply the rule to all Dictators at the Facility. Or, a specific Dictator can be selected, in which case the rule would apply to that Dictator but no others at the Facility. Further examples of setting rules will be given in coming pages. The Rules section has nine options for creating the workflow scenario the rule is meant to govern. The nine options for creating rules are:



The screenshot shows the 'Workflow Rules' form. At the top is a 'Name' field with an asterisk. Below it is the text 'If file matches below rule(s):'. There are nine dropdown menus, each with a red circle and a number next to it. The dropdowns are labeled: Facility (1), Dictator (2), Template (3), Priority (4), Current Status (5), Being Sent To (6), Flag (7), Transcriber (8), and Pool (9). Below these is the text 'Apply these settings:'. There are five more dropdown menus: Transcriber, Pool, Priority, Flag, and Status.

- 1 Facility: This dropdown contains the names Facilities that are serviced by the Transcription Team. Items of note:

- If a Facility is selected, then the Rule is applicable to just that Facility.

- If the Facility is not selected, then all Facilities have the Rule apply to them.

2

Dictator: The Dictator dropdown contains the names of all the Dictators at all the Facilities serviced by the Transcription Team. Items of note:

- If a Dictator is selected, the rule being created will apply to that Dictator only.
- If a Facility is not selected and a Dictator is not selected, then the Rule applies to all the Dictators at all the Facilities serviced.
- If a Facility is selected, the Dictator dropdown only displays the Dictators at that Facility.
- If both a Facility and a Dictator from that Facility is selected, then the Rule applies to the selected Dictator only.

3

Template: This dropdown contains the templates for all the Dictators serviced by the Transcription Team. Items of note:

- Selecting a template in this dropdown applies the Rule being created to that template only.
- If a Dictator is selected, then only the templates for that specific Dictator display.

4

Priority: This dropdown contains all available priorities available with WebChartMD. For more information on the Priority please see page 167. Items of note:

- Selecting a priority in this dropdown applies the Rule being created to that priority only.
- If a Dictator is selected, then only the priority on dictations for that specific Dictator will have the rule applied to.

5

Current Status: This dropdown defines the dictation or transcription's current location in the workflow.

- Selecting a status in this dropdown applies the Rule being created to files in that status only.
- If a Dictator is also selected, then only the files for that specific Dictator in the specified Status will have the rule applied to.

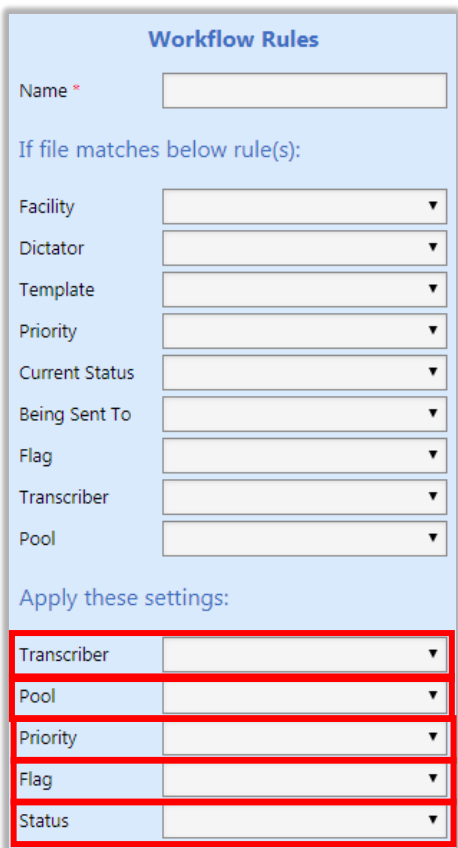
- 6 Being Sent To: This dropdown defines where the dictation or transcription is being sent after the Current Status. Items of note:
- “Being Sent to” is used in conjunction with “Current Status” as a means of delineating in cases where dictations or transcriptions are destined for different folders in the workflow. For example, completed transcriptions being sent to the Dictator’s Inbox might follow one rule, while transcriptions being sent to the Dictator’s Final folder might follow a different rule.
- 7 Flag: WebChartMD provides flags that can be set on files to highlight them in the Portal. Flags can also be set on files to trigger Rules. For more information on Flags, please see page 46.
- Selecting a Flag in this dropdown applies the Rule being created to files with that Flag only.
  - If a priority is selected, then only the files with the priority and the selected flag will have the Rule apply to.
- 8 Transcriptionist: This setting lists all Transcriptionists at the Transcription Team in the dropdown. This option is used to assign specific dictations or transcriptions to a particular Transcriptionist.
- Selecting a template in this dropdown applies the Rule being created to that template only.
  - If a Dictator is selected, then only the templates for that specific Dictator display
- 9 Pool: This setting lists all the Pools created for the Transcription Team in the dropdown. This option is used to assign specific dictations or transcriptions to a particular pool.
- Selecting a Pool in this dropdown applies the Rule being created to that pool only.
  - If a Dictator is selected, then only the templates for that specific Dictator display

### *Application*

The Application section has five options that get applied to the files once the Rules requirement has been met. The Rules section works in combination with the Application section below it to create the desire workflow action.



The five options for creating rules are:



- 1 Transcriptionist: This dropdown contains the names of all Transcriptionists at the Transcription Team.
  - If a Transcriptionist is selected, then application of the Rule means that the Files that meet the criteria of the Rule will be routed to the Transcriptionist.
- 2 Pool: This dropdown contains the names of all the Pools created by the Transcription serviced by the Transcription Team. Items of note:
  - If a Dictator is selected in the Rule section and a Pool is selected in the Application section, then all Files from the Dictator gets directly routed to the Pool.

- The Workflow Rule takes precedence over routing assignments set at the Dictator menu.

3

Priority: This dropdown contains all the Priorities for the files. Items of note:

- Selecting a Priority in this dropdown applies the Rule being created to all the Files that match the Rule requirements.
- If a Dictator is selected, then only the templates for that specific Dictator display.

4

Flag: This dropdown contains the Flags available with WebChartMD. Items of note:

- Selecting a Flag in this dropdown applies the Flag to all the Files that match the Rule requirements.
- If a Dictator is selected, then only the Flag on dictations for that specific Dictator will have the rule applied to.

5

Status: This dropdown contains the Flags available with WebChartMD. Items of note:

- Selecting a status in this dropdown applies the Rule being created to files in that status only.
- If a Dictator is also selected, then only the files for that specific Dictator in the specified Status will have the rule applied to.

## Workflow Rules Management

Transcription Team administrator can create, edit or delete Workflow Rules.

### Create Workflow Rules

To create a new rule, here are the steps:

Name	Rule: Facility	Rule: Dictator	Rule: Priority	Rule: Current Status	Rule: Being Sent To	Rule: Transcriber
QA Production ...						
2 hour stat	Hampton Radi...		2hr STAT			
Review MT Inb...	Hampton Radi...		2hr STAT	Pending	In Inbox	Margarie Co...
Fidelity Insuran...	Jacobs and Jac...	Lowen Bales	2hr STAT	In Inbox		Gloria LaForce

Save
New
Delete

**Workflow Rules**

Name \*

If file matches below rule(s):

### Step 1

Click on the “New” button so it creates a new row highlighted in gold for the new Workflow Rule.

### Step 2

Fill in the “Name” field with the name of the new Workflow Rule. The “Name” field of the new row will reflect the new name.

Name	Rule: Facility	Rule: Dictator	Rule: Priority	Rule: Current Status	Rule: Being Sent To	Rule: Transcriber
Dr. Fairchild Pri...						
QA Production ...						
2 hour stat	Hampton Radi...		2hr STAT			
Review MT Inb...	Hampton Radi...		2hr STAT	Pending	In Inbox	Margarie Co...
Fidelity Insuran...	Jacobs and Jac...	Lowen Bales	2hr STAT	In Inbox		Gloria LaForce

Save
New
Delete

#### Workflow Rules

Name \*

If file matches below rule(s):

Facility

### Step 3

Fill in the Workflow Rule and the Settings areas. In the example below, the Rule being created is “if a file is in a Pending status for Dr. Fairchild, mark them as 1 hour STAT”.

### Step 4:

Click on the “Save” button at the top. This will create that new rule and save it.

Name ▲	Rule: Facility	Rule: Dictator	Rule: Priority	Rule: Current Status	Rule: Being Sent To	Rule: Transcriber	Rule: Pool	Settings: Transcriber	Settings: Pool	Settings: Priority	Settings: Status
Review MT Inb...	Hampton Radi...		2hr STAT	Pending	In Inbox	Margarie Coom...					In Inbox
QA Production ...							Production Tea...		Production Tea...		
Fidelity Insuran...	Jacobs and Jac...	Lowen Bales	2hr STAT	In Inbox		Gloria LaForce	XRAY POOL		QA On Team A		In Final
Dr. Fairchild Pri...	April Fairchild									2hr STAT	
2 hour stat	Hampton Radi...		2hr STAT				Traci Bales				

Save
New
Delete

#### Workflow Rules

Name \*

If file matches below rule(s):

Facility

Dictator

Template

Priority

Current Status

Being Sent To

Flag

Transcriber

Pool

Apply these settings:

Transcriber

Pool

Priority

Flag

Status

## Workflow Rules Examples

### Example 1

In our first example, the transcription admin needs to send all 4 hour STAT files to a specific Transcriptionist.

**Step 1:** Click the “New” button.

**Step 2:** Name the Rule “STAT to Joanne”.

**Step 3:** Selecting the Rules and Applications:

**Step 3a:** Select the “4hr STAT” in the dropdown for STAT under Rules.

**Step 3b:** Select “Joanne” in the Transcriptionist under Applications.

**Step 4:** Click on “Save”.

Name	Rule:	Rule:	Rule:	Rule:	Rule:	Rule:	Rule:	Setting:
	Facility	Dictator	Priority	Current Status	Being Sent To	Transcriber	Pool	Transcriber
STAT to Joanne			4hr STAT					Joanne Lee
QA Production ...							Production Tea...	
2 hour stat	Hampton Radi...		2hr STAT					Traci Bales
Review MT Inb...	Hampton Radi...		2hr STAT	Pending	In Inbox	Margarie Co...		
Fidelity Insuran...	Jacobs and Jac...	Lowen Bales	2hr STAT	In Inbox		Gloria LaForce	XRAY POOL	

Save

New

Delete

Workflow Rules

Name \*  
STAT to Joanne

If file matches below rule(s):

Facility

Dictator

Template

Priority  
4hr STAT

Current Status

Being Sent To

Flag

Transcriber

Pool

Apply these settings:

Transcriber  
Lee, Joanne

Pool

Priority

Flag

Status

### Example 2

In our second example, the transcription admin needs to send all CT Scan dictations from Provider Jimmy Arnold to the “Jimmy Arnold CT Scan” pool and flag them in Green.

**Step 1:** Click the “New” button.

**Step 2:** Name the Rule “Jimmy Arnold CT Scan to Special Pool”.

**Step 3:** Selecting the Rules and Applications:

**Step 3a:** Select the dropdown for Dictator to Jimmy Arnold.

**Step 3b:** Select “CT Scan” template for Dr. Arnold.

**Step 3c:** Select Pool “Jimmy Arnold CT Scan Pool”.

**Step 3d:** Select Flag as “Green”.

**Step 4:** Click on “Save”.

Name	Rule: Dictator	Rule: Template	Rule: Priority	Setting: Transcriber	Setting: Pool	Setting: Flag
Jimmy Arnold CT Scan to Special...	Jimmy Arnold	[Hampton Radiolo] CT SCAN			Jimmy Arnold ...	Green
STAT to Joanne			4hr STAT	Joanne Lee		

Save

New

Delete

Workflow Rules

Name \*

Jimmy Arnold CT Scan to Special Po

If file matches below rule(s):

Facility

Dictator

Template

Priority

Current Status

Being Sent To

Flag

Transcriber

Pool

Apply these settings:

Transcriber

Pool

Priority

Flag

Status

### Example 3

In our third example, transcriptionist Connie Wallace submits all completed transcriptions directly to the Dictator’s Inbox with the exception of MRI reports, which need to be sent to the QA pool for MRIs.

**Step 1:** Click the “New” button.

**Step 2:** Name the Rule “Connie MRI to Pool”.

**Step 3:** Selecting the Rules and Applications:

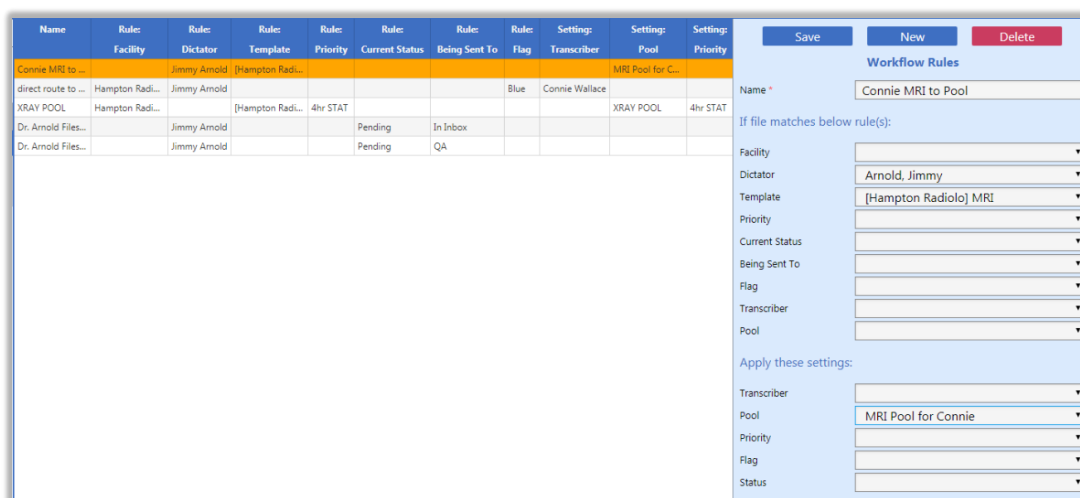
**Step 3a:** Select “Jimmy Arnold” under the dropdown for Dictator.

**Step 3b:** Select “MRI” template for All Providers under the Template. Note: The Template will have the Facility Name in front of it along with the Provider. If the Template belongs to All Providers, it will just have the Facility name in front of it.

**Step 3c:** Select “MRI Pool for Connie” under Pool dropdown for Settings.

**Step 3d:** Select “Inbox” under Status for Application.

**Step 4:** Click on “Save”.



Name	Rules: Facility	Rules: Dictator	Rules: Template	Rules: Priority	Rules: Current Status	Rules: Being Sent To	Rules: Flag	Setting: Transcriber	Setting: Pool	Setting: Priority
Connie MRI to ...	Hampton Radi...	Jimmy Arnold	[Hampton Radi...				Blue	Connie Wallace	MRI Pool for C...	
direct route to ...	Hampton Radi...	Jimmy Arnold	[Hampton Radi...	4hr STAT					XRAY POOL	4hr STAT
XRAY POOL	Hampton Radi...									
Dr. Arnold Files...		Jimmy Arnold		Pending	In Inbox					
Dr. Arnold Files...		Jimmy Arnold		Pending	QA					

Save New Delete

Workflow Rules

Name \* Connie MRI to Pool

If file matches below rule(s):

Facility  
Dictator Arnold, Jimmy  
Template [Hampton Radiolo] MRI  
Priority  
Current Status  
Being Sent To  
Flag  
Transcriber  
Pool

Apply these settings:

Transcriber  
Pool MRI Pool for Connie  
Priority  
Flag  
Status

Example 4

In our fourth example, the Transcription Team Admin needs to keep track of all dictations from Provider Jimmy Arnold files depending on what the destination folder is. For instance, if files are transcribed from Pending and submitted directly to the Dictator’ Inbox, they can flag it Green. Alternatively, if files are transcribed from Pending and submitted to the QA for reviewing before being sent to the Dictator’ inbox, they can flag it Red.

**Step 1:** Click the “New” button.

**Step 2:** Name the Rule “Dr. Arnold Files To QA”.

**Step 3:** Selecting the Rules and Applications:

**Step 3a:** Select “Jimmy Arnold” under the dropdown for Dictator.

**Step 3b:** Select “Pending” in the dropdown for Current Status.

Step 3c: Select “QA” in the dropdown for Being Sent To.

Step 3d: Select “Red” under Status for Flag.

Step 4: Click on “Save”.

Step 5: Click the “New” button.

Step 6: Name the Rule “Dr. Arnold Files To Inbox”.

Step 7: Selecting the Rules and Applications:

Step 7a: Select “Jimmy Arnold” under the dropdown for Dictator.

Step 7b: Select “Pending” in the dropdown for Current Status.

Step 7c: Select “Inbox” in the dropdown for Being Sent To.

Step 7d: Select “Green” under Status for Flag.

Step 8: Click on “Save”.

This creates two rules, one that takes effect if the files are transcribed and submitted directly to the Dictator’ Inbox and the other when they are submitted to the QA folder.

Name	Rule: Facility	Rule: Dictator	Rule: Template	Rule: Priority	Rule: Current Status	Rule: Being Sent To	Rule: Flag	Rule: Transcriber	Rule: Pool
direct route to ...	Hampton Radi...	Jimmy Arnold					Blue	Connie	
XRAY POOL	Hampton Radi...		Hampton Radi...	4hr STAT					
Connie MRI to ...		Jimmy Arnold	Hampton Radi...						
Dr. Arnold Files...		Jimmy Arnold			Pending	In Inbox			
Dr. Arnold Files...		Jimmy Arnold			Pending	QA			

Save

New

Delete

Workflow Rules

Name \*  
Dr. Arnold Files To QA

If file matches below rule(s):

Facility

Dictator  
Arnold, Jimmy

Template

Priority

Current Status  
Pending

Being Sent To  
QA

Flag

Transcriber

Pool

Apply these settings:

Transcriber

Pool

Priority

Flag  
Red

Status

### *Edit Workflow Rules*

To edit a Workflow Rule:

1. Click the row corresponding to the Rule to be edited. Row highlights in gold.
2. Details of the Rule populate into the Details Panel to the right. Make needed changes to the Rule and/or Application settings.
3. Click Save.

### *Delete Workflow Rules*

To delete a Workflow Rule:

1. Click the row corresponding to the Rule to be deleted. Row highlights in gold.
2. Press the “Delete” button in the Details Panel.

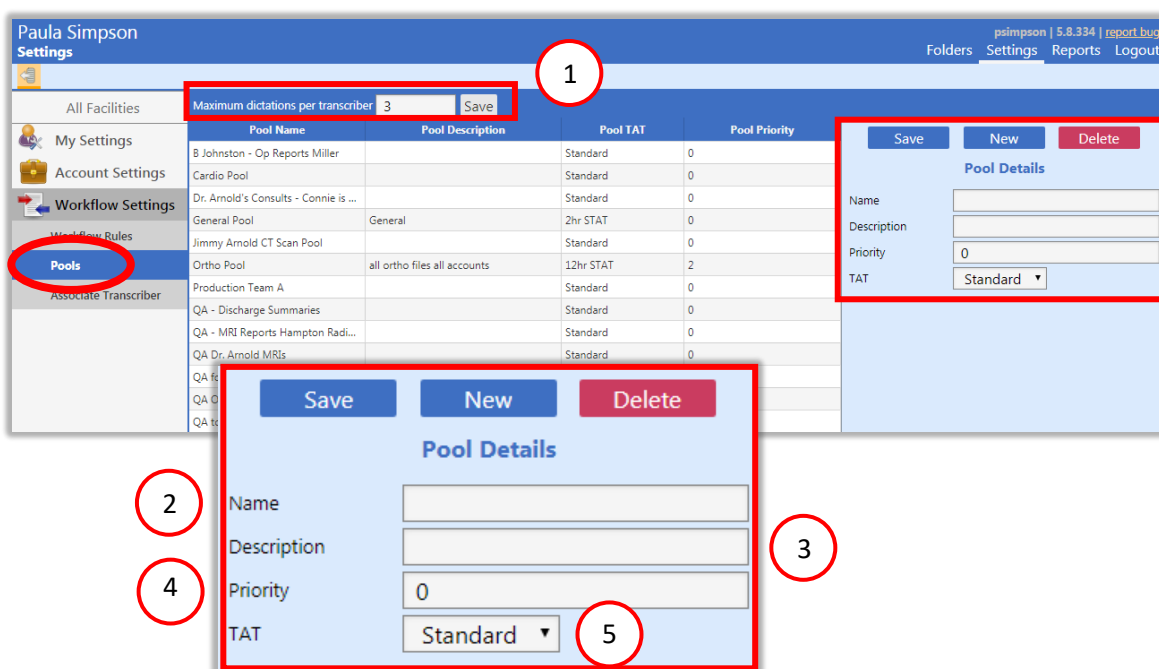


## Pools

A “Pool” is usually comprised of two or more members of the Transcription Team who collectively transcribe dictations based on certain workflow requirements of the Transcription Organization. Pools are used to create workflows that automatically deliver dictations to Transcriptionists without any manual intervention by the transcription manager.

Transcriptionists can belong to as many Pools as required. When Transcriptionists belong to more than one Pool, dictations will be ordered or prioritized in the Transcriptionist’s Pool based on workflow definitions set elsewhere in the system, such as those set in Workflow Rules, or specific TAT assignments made at the Template level.

Dictators can be assigned to Pools in two different ways. A simple Pool assignment can be made via the Dictators screen (see page 158) if all dictations for a Dictator will be routed to the same Pool. However, if more nuanced routing assignments need to be created, those are best done via the Workflow Rules section.



Paula Simpson  
Settings

Maximum dictations per transcriber 3 Save

1

Pool Name	Pool Description	Pool TAT	Pool Priority
B Johnston - Op Reports Miller		Standard	0
Cardio Pool		Standard	0
Dr. Arnold's Consults - Connie is ...		Standard	0
General Pool	General	2hr STAT	0
Jimmy Arnold CT Scan Pool		Standard	0
Ortho Pool	all ortho files all accounts	12hr STAT	2
Production Team A		Standard	0
QA - Discharge Summaries		Standard	0
QA - MRI Reports Hampton Radi...		Standard	0
QA Dr. Arnold MRIs		Standard	0

2

3

4

5

Save New Delete

Pool Details

Name

Description

Priority 0

TAT Standard

## Folder Management Functions

- 1 “Maximum dictations per Transcriptionist”: This is a global setting that defines the maximum number of dictations that will download to members of Pools. To set a maximum number of dictations per Transcriptionist:

1. Enter a number into the text field and a “Save” button.

Notes on “Maximum dictations per Transcriptionist:

1. This setting pertains to Pool dictations only. Dictations that are direct routed to a Transcriptionist are not limited by this setting. More information on Routing can be found on page 99.

2 Name: This field is used to create the name of the Pool.

3 Description: This field is optional and is used for any further details related to the Pool.

4 Priority: This field is used to establish a ranking, or weighting, of a Pool’s priority. The higher the number entered, the higher the priority of the Pool. If a Transcriptionist is in multiple Pools, the Priority setting routes dictations to the Transcriptionist based on the Pool’s Priority. The default value for all Pools is “0”.

Notes on Priority:

1. If “0” is left as the Priority for all Pools, then dictations will route to Transcriptionists in TAT order, meaning, oldest files will route first.
2. If a Pool is assigned a Priority of “1” while all other Pools have a value of “0”, then all dictations in Pool Priority 1 will route to be transcribed before any files from Pools with a “0” value are routed.

5 TAT: This field sets a TAT for all dictations in the Pool.

Notes on TAT:

1. Describe TAT’s relationship to Priority

## Pools Management

Pools can be created, edited and deleted.

### Create Pools

To create a new pool:

Step 1: Click the “New” button in the Pool Details panel.

Step 2: Create the Pool Name. Add Description if desired.

Step 3: Define the Pool’s priority if other than the Default of “0”.

Step 4: Define the Pool’s TAT if other than Standard.

Step 5: Click “Save” to create the Pool.

### Edit Pools

To edit a pool:

Step 1: Click the row of the Pool to be edited. Row highlights in gold.

Step 2: Edit the information in the Pool Details section.

Step 3: Click the “Save” button to save the changes to the Pool.

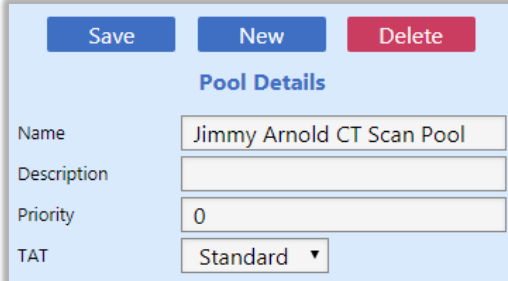
### Delete Pools

To delete a pool:

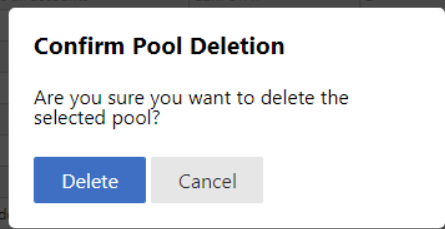
Step 1: Click the row of the Pool to be deleted. Row highlights in gold.

Step 2: Click on the “Delete” button.

Step 3: Click “Delete” on the confirmation dialog box.



The Pool Details panel is a light blue box with a title bar. It contains three buttons at the top: 'Save' (blue), 'New' (blue), and 'Delete' (red). Below the buttons is the title 'Pool Details'. The panel contains four input fields: 'Name' (text box with 'Jimmy Arnold CT Scan Pool'), 'Description' (text box), 'Priority' (text box with '0'), and 'TAT' (dropdown menu with 'Standard' selected).



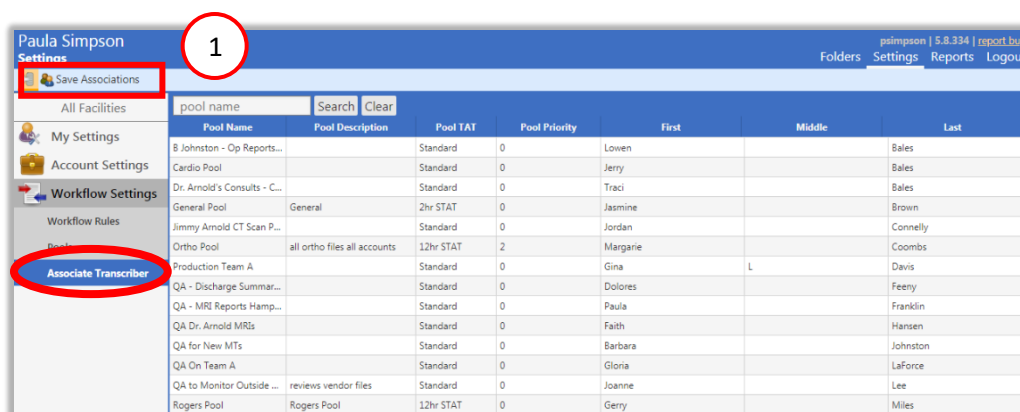
The Confirm Pool Deletion dialog box is a white box with a black border. It has a title 'Confirm Pool Deletion' in bold. Below the title is the text 'Are you sure you want to delete the selected pool?'. At the bottom are two buttons: 'Delete' (blue) and 'Cancel' (gray).

## Associate Transcriber

The Associate Transcriber screen is used to assign, or associate, Transcriptionists to specific Pools.

Notes on Associate Transcriber:

1. The Associate Transcriber function is used to add Transcriptionists to Pools. It does not associate Transcriptionists to Dictators, which is done via the Associations screen. For more information on using the Associations feature, please see page 217.
2. A Transcriptionist can belong to multiple Pools. When a Transcriptionist belongs to multiple Pools, dictations will route into the Transcriptionist's queue from each Pool according to the routing priorities set for those Pools.



Pool Name	Pool Description	Pool TAT	Pool Priority	First	Middle	Last
B Johnston - Op Reports...		Standard	0	Lowen		Bales
Cardio Pool		Standard	0	Jerry		Bales
Dr. Arnold's Consults - C...		Standard	0	Traci		Bales
General Pool	General	2hr STAT	0	Jasmine		Brown
Jimmy Arnold CT Scan P...		Standard	0	Jordan		Connelly
Ortho Pool	all ortho files all accounts	12hr STAT	2	Margarie		Coombs
Production Team A		Standard	0	Gina	L	Davis
QA - Discharge Summar...		Standard	0	Dolores		Feeny
QA - MRI Reports Hamp...		Standard	0	Paula		Franklin
QA Dr. Arnold MRIs		Standard	0	Faith		Hansen
QA for New MTs		Standard	0	Barbara		Johnston
QA On Team A		Standard	0	Gloria		LaForce
QA to Monitor Outside ...	reviews vendor files	Standard	0	Joanne		Lee
Rogers Pool	Rogers Pool	12hr STAT	0	Geny		Miles

## Folder Management Function

The Associate Transcriber area has only one folder management function button in the toolbar, "Save Associations".

1. Save Associations: This function saves associations made when adding Transcriptionists to Pools. If the user navigates away to another page without clicking "Save Associations", any changes that had been made will be lost.

## Managing Associations

Associations between a Transcriptionist and a Pool can be edited, created and deleted.

## To Edit an Existing Association

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

- The left side of the screen shows all Pool names.
- The right side of the screen shows all Transcriptionists.

Note: This feature is only available when the dropdown in the top left has “All Facilities” selected, since the Transcriptionists can service all Facilities and their Dictators.

2. Select the Pool by clicking the name in the left side of the panel. Transcriptionists that are already associated with will display highlighted on the right side of the panel (see below).

Paula Simpson Settings		psimpson   5.8.334   <a href="#">report bug</a>					
Save Associations		Folders Settings Reports Logout					
All Facilities	pool name	Search	Clear				
My Settings	Pool Name	Pool Description	Pool TAT	Pool Priority	First	Middle	Last
Account Settings	B Johnston - Op Reports...		Standard	0	Lowen		Bales
Workflow Settings	Cardio Pool		Standard	0	Jerry		Bales
	Dr. Arnold's Consults - C...		Standard	0	Traci		Bales
Workflow Rules	General Pool	General	2hr STAT	0	Jasmine		Brown
Pools	Jimmy Arnold CT Scan P...		Standard	0	Jordan		Connelly
Associate Transcriber	Ortho Pool	all ortho files all accounts	12hr STAT	2	Margaret		Coombs
	Production Team A		Standard	0	Gina	L	Davis
	QA - Discharge Summar...		Standard	0	Dolores		Feeny
	QA - MRI Reports Hamp...		Standard	0	Paula		Franklin
	QA Dr. Arnold MRIs		Standard	0	Faith		Hansen
	QA for New MTs		Standard	0	Barbara		Johnston
	QA On Team A		Standard	0	Gloria		LaForce
	QA to Monitor Outside ...	reviews vendor files	Standard	0	Joanne		Lee
	Rogers Pool		12hr STAT	0	Gerry		Miles
	Smith Pool	Smith Pool	Standard	2	Connie		Miller

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

## To Create a New Association

1. Ensure that the Pool's name is highlighted on the left side of the panel.
2. To associate a Transcriptionist with the Pool, hold down the Control key on the keyboard and click the Transcriptionist name to the right.
3. To associate another Transcriptionist to that same Pool, click on another Transcriptionist with the control key still held down.

- Click “Save Associations” in the top left to save changes.

Paula Simpson  
Settings

psimpson | 5.8.334 | report bug  
Folders Settings Reports Logout

Save Associations

All Facilities

My Settings

Account Settings

Workflow Settings

Workflow Rules

Pools

Associate Transcriber

Pool Name	Pool Description	Pool TAT	Pool Priority	First	Middle	Last
B Johnston - Op Reports...		Standard	0	Lowen		Bales
Cardio Pool		Standard	0	Jerry		Bales
Dr. Arnold's Consults - C...		Standard	0	Traci		Bales
General Pool	General	2hr STAT	0	Jasmine		Brown
Jimmy Arnold CT Scan P...		Standard	0	Jordan		Connelly
Ortho Pool	all ortho files all accounts	12hr STAT	2	Margarie		Coombs
Production Team A		Standard	0	Gina	L	Davis
QA - Discharge Summar...		Standard	0	Dolores		Feeny
QA - MRI Reports Hamp...		Standard	0	Paula		Franklin
QA Dr. Arnold MRIs		Standard	0	Faith		Hansen
QA for New MTs		Standard	0	Barbara		Johnston
				Gloria		LaForce
				Joanne		Lee
				Gerry		Miles
				Connie		Miller

Lowen Bales

Jerry Bales

Traci Bales

Jasmine Brown

Jordan Connelly

Margarie Coombs

Gina L Davis

Dolores Feeny

Paula Franklin

Faith Hansen

Barbara Johnston

Gloria LaForce

Joanne Lee

### To Remove an Existing Association

- Ensure that the Pool's name is highlighted on the left side of the panel.
- Hold down the Control key and click the Transcriptionist's name that appears highlighted in gold. The highlight color disappears from the Transcriptionist's name (Marjorie Coombs in example below).

Paula Simpson  
Settings

psimpson | 5.8.334 | report bug  
Folders Settings Reports Logout

Save Associations

All Facilities

pool name Search Clear

Pool Name	Pool Description	Pool TAT	Pool Priority	First	Middle	Last
B Johnston - Op Reports...		Standard	0	Loiwen		Bales
Cardio Pool		Standard	0	Jerry		Bales
Dr. Arnold's Consults - C...		Standard	0	Traci		Bales
General Pool	General	2hr STAT	0	Jasmine		Brown
Jimmy Arnold CT Scan P...		Standard	0	Jordan		Connelly
Ortho Pool	all ortho files all accounts	12hr STAT	2	Margarie		Coombs
Production Team A		Standard	0	Gina	L	Davis
QA - Discharge Summar...		Standard	0	Dolores		Feeny
QA - MRI Reports Hamp...		Standard	0	Paula		Franklin
QA Dr. Arnold MRIs		Standard	0	Faith		Hansen
QA for New MTs		Standard	0	Barbara		Johnston
			0	Gloria		LaForce
			0	Joanne		Lee
			2	Gerry		Miles
				Connie		Miller

Lowen  
Jerry  
Traci  
Jasmine  
Jordan  
Margarie  
Gina L  
Dolores  
Paula  
Faith  
Barbara

Bales  
Bales  
Bales  
Brown  
Connelly  
Coombs  
Davis  
Feeny  
Franklin  
Hansen  
Johnston

- After removing the association, click the "Save Associations" button in the toolbar to commit new settings. Wait until the "Updating, don't navigate away" message at the top of the screen disappears before leaving the screen (see below).

Paula Simpson  
Settings

psimpson | 5.8.334 | report bug  
Folders Settings Reports Logout

Save Associations

pool name Search Clear

Pool Name	Pool Description	Pool TAT	Pool Priority	First	Middle	Last
B Johnston - Op Reports...		Standard	0	Loiwen		Bales
Cardio Pool		Standard	0	Jerry		Bales
Dr. Arnold's Consults - C...		Standard	0	Traci		Bales
General Pool	General	2hr STAT	0	Jasmine		Brown
Jimmy Arnold CT Scan P...		Standard	0	Jordan		Connelly
Ortho Pool	all ortho files all accounts	12hr STAT	2	Margarie		Coombs
Production Team A		Standard	0	Gina	L	Davis
QA - Discharge Summar...		Standard	0	Dolores		Feeny
QA - MRI Reports Hamp...		Standard	0	Paula		Franklin
QA Dr. Arnold MRIs		Standard	0	Faith		Hansen
QA for New MTs		Standard	0	Barbara		Johnston
QA On Team A		Standard	0	Gloria		LaForce
QA to Monitor Outside ...	reviews vendor files	Standard	0	Joanne		Lee
Rogers Pool	Rogers Pool	12hr STAT	0	Gerry		Miles
Smith Pool	Smith Pool	Standard	2	Connie		Miller

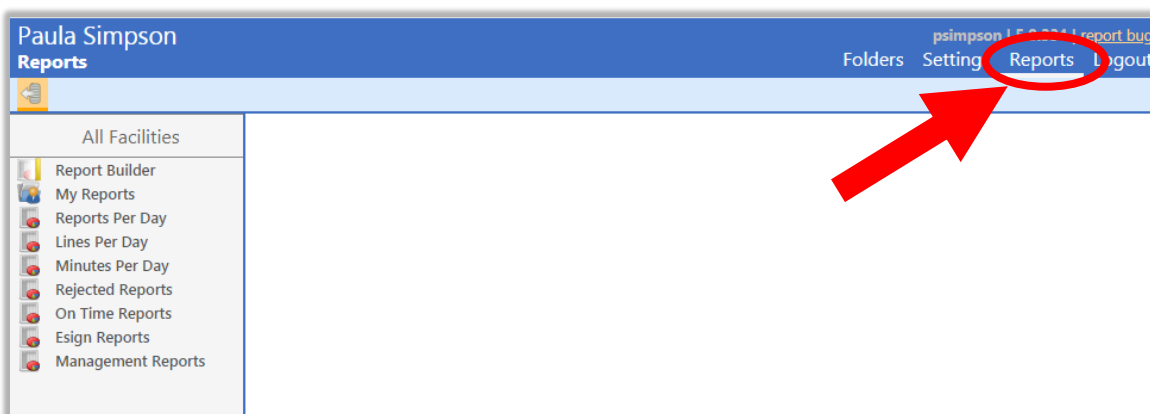
updating, don't navigate away

## Reports View



## Reports

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

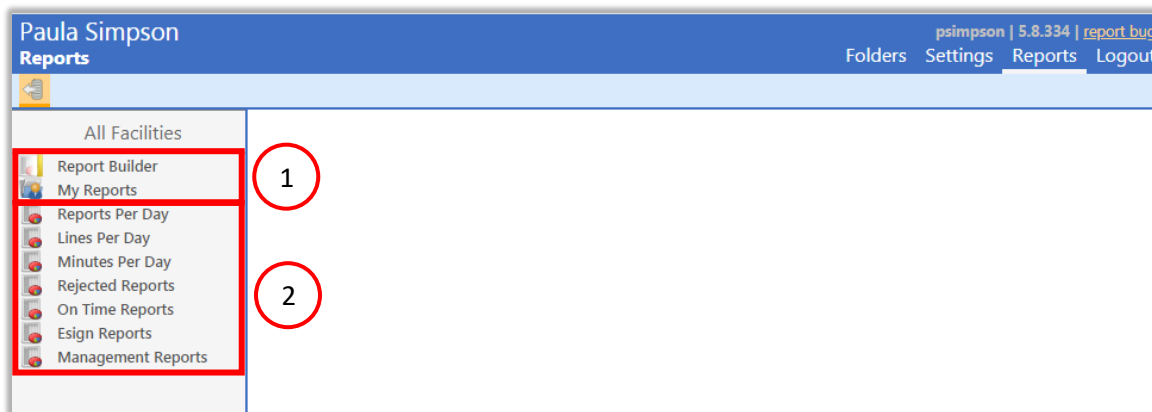


## Workflow Management Functions

When the Reports section is initially opened, there are no Workflow Management Function buttons in the toolbar (see images above and below). Toolbar buttons do appear in other areas of the Reports section and will be described in upcoming sections.

## Functional Areas

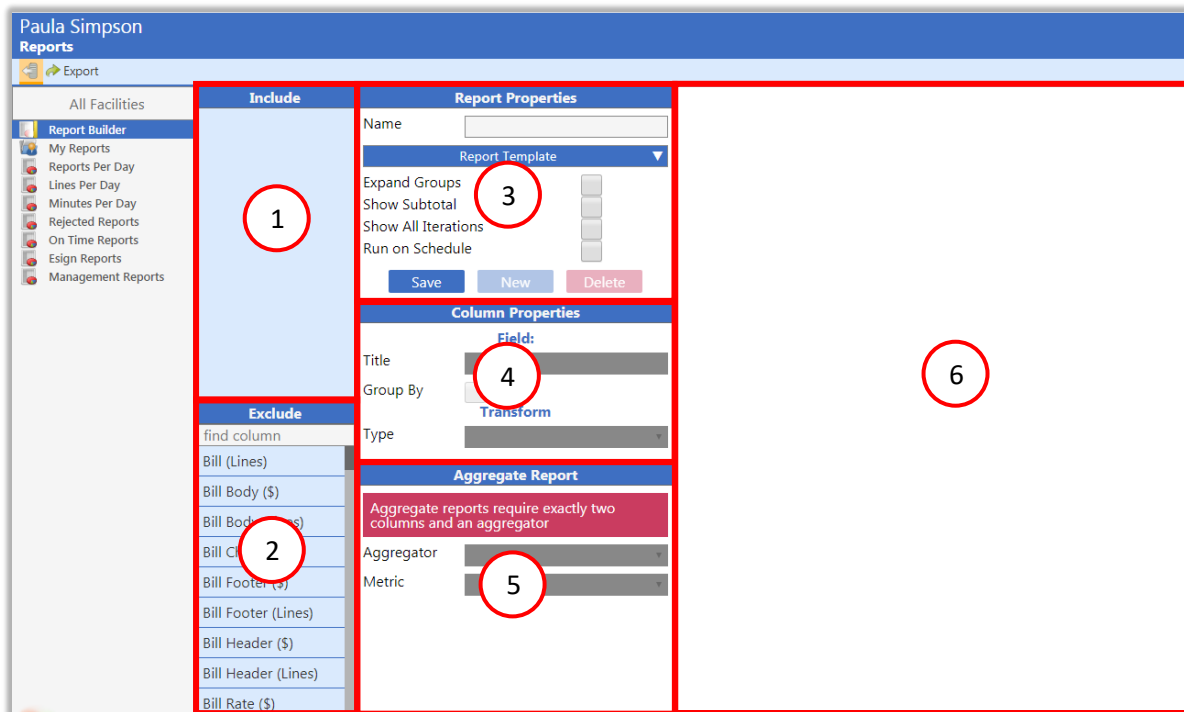
The Reports section consists of two functional areas:



- 1 Report Builder/My Reports: This section allows the user to create and store custom reports and is explained in detail in the next section.
- 2 Pre-built Reports: This section contains some of the most commonly asked for pre-built reports that can be generated on demand.

## Report Builder/My Reports

WebChartMD's Report Builder and the My Reports section are designed to give users an easy way to build and store custom reports for re-use. This section describes the tools available within the Report Builder and describes how to create and store custom reports.



The screenshot shows the 'Report Builder' interface for 'Paula Simpson'. The interface is divided into several sections:

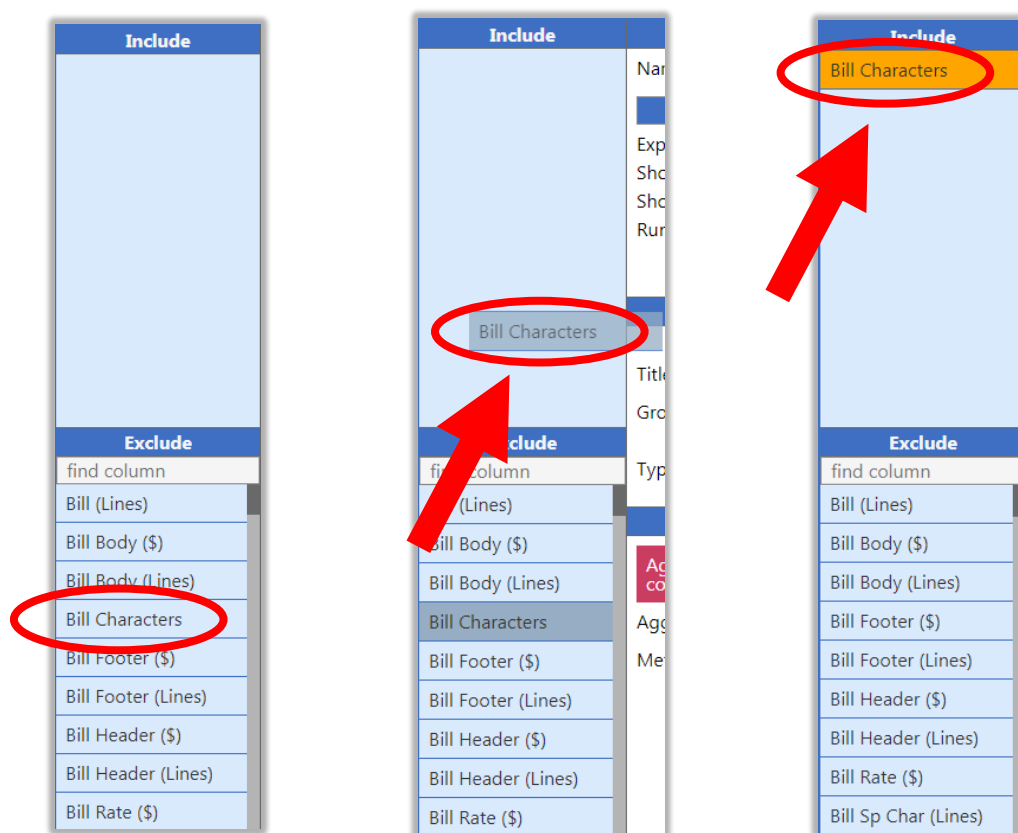
- Left Sidebar (Callout 1):** A list of report categories including 'All Facilities', 'Report Builder', 'My Reports', 'Reports Per Day', 'Lines Per Day', 'Minutes Per Day', 'Rejected Reports', 'On Time Reports', 'Esign Reports', and 'Management Reports'.
- Include/Exclude Section (Callout 2):** A list of columns to include or exclude from the report. The 'Include' section is currently active, showing a list of columns like 'find column', 'Bill (Lines)', 'Bill Body (\$)', etc.
- Report Properties (Callout 3):** A section for configuring the report. It includes fields for 'Name', 'Report Template' (a dropdown menu), and checkboxes for 'Expand Groups', 'Show Subtotal', 'Show All Iterations', and 'Run on Schedule'. There are 'Save', 'New', and 'Delete' buttons.
- Column Properties (Callout 4):** A section for configuring the columns. It includes fields for 'Title', 'Group By', and 'Type'. There is a 'Transform' button.
- Aggregate Report (Callout 5):** A section for configuring the aggregate report. It includes a message: 'Aggregate reports require exactly two columns and an aggregator'. There are dropdown menus for 'Aggregator' and 'Metric'.
- Main Report Area (Callout 6):** A large empty area on the right side of the interface, intended for the generated report.

- 1 2 Include and Exclude

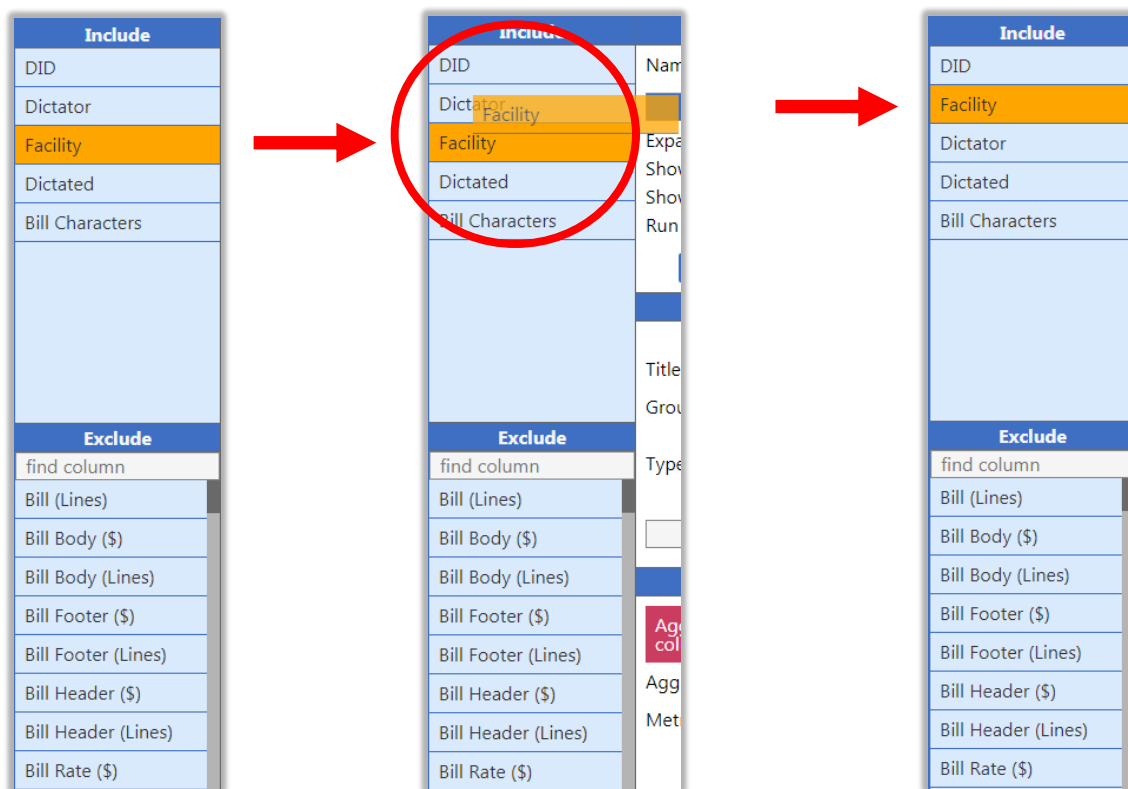
The ReportBuilder allows users to access over 100 different tables in the system in which data is stored and organize the data in a report format easily designed by the user.

Each of the data sets available for report creation are listed in the “Exclude” section of the ReportBuilder (see section “2” in the above image), and can be thought of as column headers, just like a column header in Microsoft Excel.

A report is built by dragging and dropping the desired column headers from the “Exclude” section to the “Include” section. Once the column headers are dropped in the Include section, they can be rearranged by dragging and dropping them in a different position.



Example above shows how to drag and drop the column headers from Exclude to Include



Drag and drop the “Column Name Plates” to rearrange them

## 2 Exclude Column Headers

As explained above, the “Exclude” section holds the available column headers for reports. The “find column” box is a quick search tool for finding column headers by name.

Column headers available (arranged alphabetically) are:

- Bill (Lines): Total Line count that is billed.
- Bill Body (\$): Total US Dollar amount for the body (excluding headers & footers) that is billed.
- Bill Body (Lines): Total Line count for the body (excluding headers and footers) that is billed.
- Bill Characters: Total number of characters for each transcription that is billed.

- Bill Footer (\$): Total US Dollar amount for the footer that is billed.
- Bill Footer (Lines): Total line count for the footer that is billed.
- Bill Header (\$): Total US Dollar amount for the header that is billed.
- Bill Header (Lines): Total Line count for the header that is billed.
- Bill Rate (\$): Rate of billing in US Dollar.
- Bill Sp Char (Lines): Total line count for special characters that is billed.
- Bill Template (\$): Total US Dollar amount for the template that is billed.
- Bill Total (\$): Total US Dollar amount for each transcription that is billed.
- Bill Words: Total number of words for each transcription that is billed.
- Billing Code: This is a text field for use in manually entering billing codes that display in the Folders view.
- Comments: Comments attached by the transcriptionist while transcribing.
- Cost – QA: Total US Dollar amount to be paid for any edits made in the QA folder.
- Cost – QA (Lines): Total number of lines of edits made in the QA folder.
- Cost – Transcriber: Total US Dollar amount to be paid to the transcriber for each transcription.
- Cost – Transcriber + QA: Total US Dollar amount to be paid to the transcriber and for any edits in QA folder for each transcription.
- Cost – Transcriber + QA (Line): Total Line count by the transcriber and edits in QA folder for each transcription.
- Current Transcriber: Name of the last transcriptionist that edited the transcribed document.
- Date Modified: Date and time of last editing of the transcribed document.
- Dictated Date: Date and time of dictation.
- Dictator: First and last name of the Dictator.
- DID: Short for “Dictation ID”, a unique 8 digit number assigned to a dictation.

- DOB: Date of birth of the patient.
- DOV: Date of the visit of the patient.
- Due Date: Date and time within which the dictation would be considered not late.
- Effective Date: This field also represents the Date of the visit of the patient.
- Encounter: This field holds an encounter ID generated for electronic health record interfaces.
- eSigned Date: Date and time the transcription was electronically signed.
- Facility: The healthcare entity serviced by the Transcription Team.
- Facility – Dictator: Facility name, followed by a – (dash) followed by the Dictator’ first and last name (as described above).
- File Name: The unique identifier assigned by the system for tracking a dictation or transcription.
- Finalized Date: Date and time of the transcription being sent to the Final folder.
- Finished: Date and time that the transcription was submitted to the Dictator’ Inbox.
- First: First name of the patient.
- Footer Margin (\$): The difference in dollars between the price and the cost for footer content.
- Margin Footer (%) The difference as a percent between the price and the cost for footer content.
- Header Margin (\$): The difference in dollars between the price and the cost for header content.
- Margin Header (\$) Duplicate of Header Margin (\$)
- ID #: The unique identifier used by the Facility for identifying the patient. Sometimes referred to as the Medical Record Number (MRN).
- Job #: For call-in dictation files, the unique identifier assigned by the telephone system for tracking a dictation or transcription.

- Last: Last name of the patient.
- Last Modified: The name of the Transcription Team member who last modified the transcription. .
- Length: The length of the audio dictation expressed in hours: minutes: seconds.
- Line Margin (%) w/QA: The difference expressed as a percent between the price and the cost for each line of a transcription that has been transcribed and QA'd.
- Line Margin (\$) w/QA: The difference expressed in dollars between the price and the cost for each line of a transcription that has been transcribed and QA'd.
- Location: For facilities using multiple locations.
- Margin (%) w/QA: The difference expressed as a percent between the price and the cost for a transcription that has been transcribed and QA'd.
- Margin (\$) w/QA: The difference expressed in dollars between the price and the cost for a transcription that has been transcribed and QA'd.
- Margin Pre-QA (%): The difference expressed as a percent between the price and the cost for a transcription before QA.
- Margin Pre-QA (\$) The difference expressed in dollars between the price and the cost for a transcription before QA.
- Margin Sp Char (%). The difference expressed as a percentage between the price and the cost for special characters.
- Margin Sp Char (\$). The difference expressed in dollars between the price and the cost for special characters.
- Margin Template (%) The difference expressed as a percentage between the price and the cost for template characters.
- Margin Template (\$): The difference expressed in dollars between the price and the cost for template characters.
- Margin/Line Pre-QA (%): The difference expressed as a percentage between the price and the cost for each line in a transcription before QA.
- Margin Line Pre-QA (\$): The difference expressed in dollars between the price and the cost for each line in a transcription before QA.

- **Note:** Information provided in the Clinic Note field of the transcription.
- **Note Type:** An editable field used by the Transcription Team to add any special comments related to the Report Type.
- **On Time:** Displays “On Time” if a report’s Finished date and time was prior to the specified turnaround time and displays “Late – xxx Hours” if a report was late, where xxx equals the hours late.
- **Original Transcriber:** Name of the transcriber who transcribed the dictation.
- **Pages:** Number of pages in the transcribed document.
- **Pay (Lines):** Total number of lines that the Transcriptionist gets paid for.
- **Pay Body (\$):** Total US Dollar amount for the body (excluding headers & footers) that is paid.
- **Pay Chars:** Total number of characters that the Transcriptionist gets paid for.
- **Pay Footer (\$):** Total US Dollar amount for the footer that is paid.
- **Pay Footer (Lines):** Total number of Characters in the footer that the Transcriptionist gets paid for.
- **Pay Header (\$):** Total US Dollar amount for the header that is paid.
- **Pay Header (Lines):** Total number of characters in the header that the Transcriptionist gets paid for.
- **Pay Rate – Transcriber:** Rate of payment to the Transcriptionist in US Dollar.
- **Pay SP Char (\$):** Total US Dollar amount for Special Characters that the Transcriptionist is paid for.
- **Pay Sp Char (Lines):** Total Line Count for Special Characters that the Transcriptionist is paid for.
- **Pay Template (\$):** Total US Dollar amount for the Template that the Transcriptionist is paid for.
- **Pay Template (Lines):** Total Line Count for the Template that the Transcriptionist is paid for.
- **Phone Mins:** The total number of minutes that the Dictator called into the phone line for the dictation.



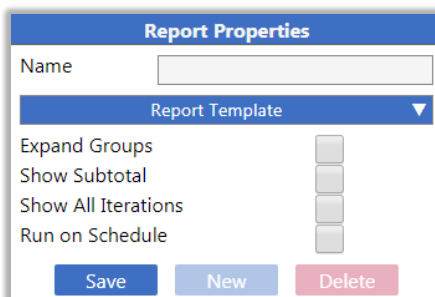
- Pool: A “Pool” is usually comprised of two or more members of the Transcription Team who collectively transcribe dictations based on certain workflow requirements.
- QA Duration: Amount of time transcription remained in the QA folder.
- QA Finished: Date and time the transcription was submitted from the QA folder.
- QA Line Diff: Change in line total for the transcription as a result of QA expressed as a number.
- QA Line Diff (%): Change in line total for the transcription as a result of QA expressed as a percentage.
- QA Lines: Total number of lines added in the QA folder to the transcribed document.
- QA Routed: Date and time that the transcription was routed to QA.
- QA Started: Date and time that the transcription was opened in the QA folder.
- Rejection Reason: The reason provided by the Dictator while rejecting the transcription.
- Report Details: Editable field used by the transcription team to add comments related to the Report Type.
- Report Type: Displays the name assigned to the Template at the time the Template was created/uploaded.
- Routed: Date and time dictation or transcription was routed to the Transcription Team member.
- Sp Char Bill: Total bill amount expressed in dollars for special characters.
- Status: Current status of dictation or transcription, such as “Pending”, “Inbox” etc.
- TAT: this column displays the turn-around time assigned to a dictation. See page 167 for a full description of dictation Priority & TAT setup.
- Transcriber Finished: Date and time that the Transcription Team member submitted the transcription.
- Uploaded: Date and time of the dictation being uploaded by the Dictator.

## 3

## Report Properties

The Report Properties option controls four functions within the Report Builder.

- Name of the Report
- Report Template
- Column Controls
- Report Saving Controls



### Name of the Report

This field is used to create the name for the report and to save the report using that name.

### Column Controls

This section has four checkboxes that provides control features for the column.

- Expand Groups
- Show Subtotal
- Show All Iterations
- Run on Schedule

### Expand Groups

This checkbox allows data in the report to present in an expanded format instead of a summary format.

“Expand Groups” works in conjunction with the “Group By” checkbox, found under “Column Properties” section. When “Group By” is selected, the Expand Groups option will expand the rows in the report by the “Group By” criteria.

In the example below, the “Group By” selected is “Dictator”. When “Expand Group” is selected in the Report Properties section, the report Preview Panel changes from showing the data in a summary format (see 1 below) to an expanded view ( see 2 below) in which all rows are displayed for each Dictator.

Include	Report Properties	DID	Facility	Dictator	Dictated Date
DID	Name	# 50	-	-	-
Facility	Report Template	# 16	Hampton Radiology	Arnold, Jimmy	-
Dictator	Expand Groups	# 29	Fidelity Insurance	Bales, Lowen	-
Dictated Date	Show Subtotal	# 1	Hampton Radiology	Fairchild, April	06/21/19 13:57
Finished	Show All Iterations	# 1	Hampton Radiology	Renault, James	06/21/19 13:51
eSigned Date	Run on Schedule	# 3	Fidelity Insurance	Smithson, John	-
	Save New Delete				
	Column Properties				
	Field: practitionerid				
	Title Dictator				
	Group By				
	Transform				

1



Report Properties	DID	Facility	Dictator	Dictated Date	Finished
Name	# 50	-	-	-	-
Report Template	# 16	Hampton Radiology	Arnold, Jimmy	-	-
Expand Groups	34877484	Hampton Radiology	Arnold, Jimmy	06/21/19 13:52	10/31/19 15:05
Show Subtotal	34877485	Hampton Radiology	Arnold, Jimmy	06/21/19 13:52	10/31/19 15:13
Show All Iterations	35011016	Hampton Radiology	Arnold, Jimmy	11/08/19 10:11	11/08/19 10:11
Run on Schedule	34588155	Hampton Radiology	Arnold, Jimmy	06/21/19 14:07	11/11/19 15:48
Save New Delete	34588135	Hampton Radiology	Arnold, Jimmy	06/21/19 13:58	01/29/20 10:41
Column Properties	35183611	Hampton Radiology	Arnold, Jimmy	01/07/20 11:26	01/30/20 15:09
Field: practitionerid	35183614	Hampton Radiology	Arnold, Jimmy	01/07/20 11:27	01/30/20 15:13
Title Dictator	35183615	Hampton Radiology	Arnold, Jimmy	01/07/20 11:27	01/30/20 15:14
Group By	35183480	Hampton Radiology	Arnold, Jimmy	01/07/20 11:01	01/31/20 11:37
Transform	35183485	Hampton Radiology	Arnold, Jimmy	01/07/20 11:02	01/31/20 12:03
Type	35183486	Hampton Radiology	Arnold, Jimmy	01/07/20 11:02	01/31/20 12:06
Filter	35183487	Hampton Radiology	Arnold, Jimmy	01/07/20 11:01	01/31/20 12:08
	35183488	Hampton Radiology	Arnold, Jimmy	01/07/20 11:02	01/31/20 12:10

2

## Show Subtotal

When “Show Subtotal” is checked, reports show subtotals for the “Group By” selections as well as the grand total. In the example below, “Group By” is selected by Dictator, and so Subtotals are displayed for each Dictator with a Grand Total displayed for all Dictators.

Report Properties		DID	Facility	Dictator	Dictated Date	Finished
Name		# 50	-	-	-	-
Report Template		# 16	Hampton Radiology	Arnold, Jimmy	-	-
Expand Groups	<input checked="" type="checkbox"/>	34877484	Hampton Radiology	Arnold, Jimmy	06/21/19 13:52	10/31/19 15:05
Show Subtotal	<input checked="" type="checkbox"/>	34877485	Hampton Radiology	Arnold, Jimmy	06/21/19 13:52	10/31/19 15:13
Show All Iterations	<input checked="" type="checkbox"/>	35011016	Hampton Radiology	Arnold, Jimmy	11/08/19 10:11	11/08/19 10:11
Run on Schedule	<input type="checkbox"/>	34588155	Hampton Radiology	Arnold, Jimmy	06/21/19 14:07	11/11/19 15:48
Save	New	34588135	Hampton Radiology	Arnold, Jimmy	06/21/19 13:58	01/29/20 10:41
Column Properties		35183611	Hampton Radiology	Arnold, Jimmy	01/07/20 11:26	01/30/20 15:09
Field: practitionerid		35183614	Hampton Radiology	Arnold, Jimmy	01/07/20 11:27	01/30/20 15:13
Title	Dictator	35183615	Hampton Radiology	Arnold, Jimmy	01/07/20 11:27	01/30/20 15:14
Group By	<input checked="" type="checkbox"/> Transform	35183480	Hampton Radiology	Arnold, Jimmy	01/07/20 11:01	01/31/20 11:37
Type		35183485	Hampton Radiology	Arnold, Jimmy	01/07/20 11:02	01/31/20 12:03
	Filter	35183486	Hampton Radiology	Arnold, Jimmy	01/07/20 11:02	01/31/20 12:06
		35183487	Hampton Radiology	Arnold, Jimmy	01/07/20 11:01	01/31/20 12:08
		35183488	Hampton Radiology	Arnold, Jimmy	01/07/20 11:02	01/31/20 12:10

## Show All Iterations

When clicked, this feature displays additional data fields in the “Exclude” list that are specific to the QA workflow. Data fields that are displayed are:

- Can you please identify which new column headers are available when this is checked?

## Run on Schedule

This feature creates a rule that automatically distributes the report to a recipient list on a configurable schedule.

Clicking “Run on Schedule” opens an options box where configuration details can be added, namely:

- Run...

This feature is a dropdown that holds five options:

- Daily
- Weekly
- Bi-Weekly
- Monthly
- Quarterly

- Mail to

Report Properties

NameMain Report

Report Template

Expand Groups

Show Subtotal

Show All Iterations

Run on Schedule

Schedule

Run...

Mail to

last run: never

SaveNewDelete

This section is used for adding recipient email addresses for report distribution. Recipient email addresses should be comma separated.

## Report Saving Options

This section has three Report Control buttons available for the user to control

- Save
- New
- Delete

### Save

This button allows the user to “Save” the created Custom Report. Saved reports are stored in the “My Reports” section.

### New

This button creates a new Custom Report.

### Delete

This button deletes the current Report loaded into Report Builder.

Notes on Report Properties:

1. Below the Report Saving Options, a message appears indicating when the report was last run.

## 4 Column Properties

This “Column Properties” section has four fields divided into two sections:

### Section 1: Field

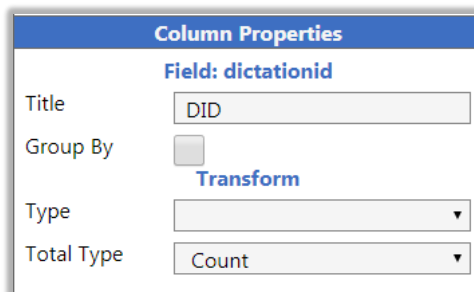
The text displayed after the “Field” is the name of the selected Column in the Include section.

#### Title:

This field displays the name of the selected Column.

#### Group By:

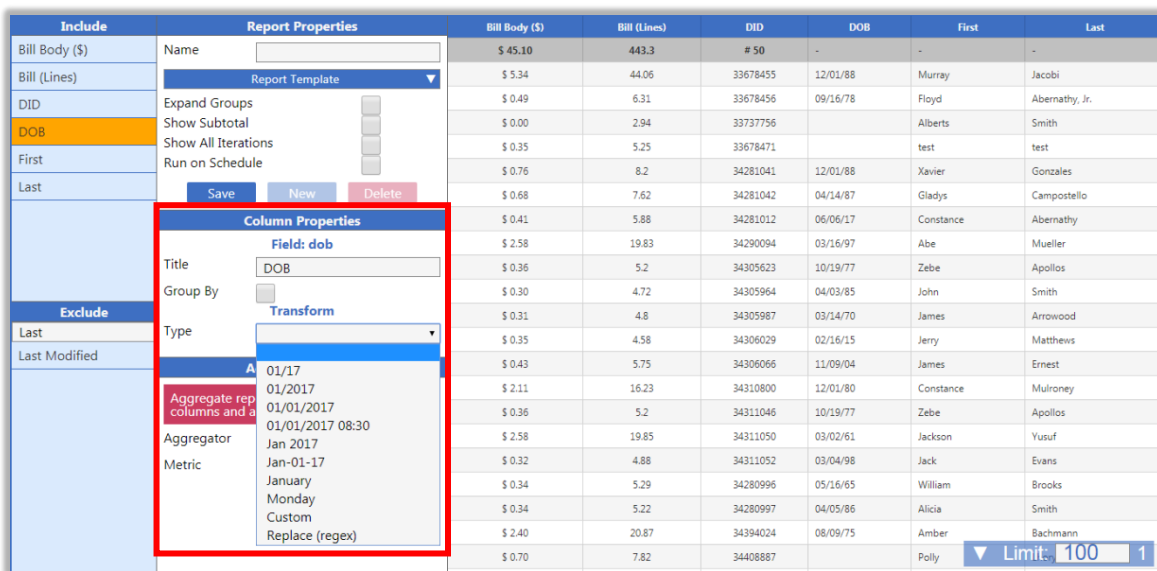
The Group By checkbox is accessible when a column header in the Include section is selected. For example, if Facility is one of the column headers that has been moved from Exclude to Include, and



Column Properties	
Field: dictationid	
Title	DID
Group By	<input type="checkbox"/>
Type	Transform
Total Type	Count

the Facility header is clicked, adding the “Group By” checkbox will collapse all of the rows of the Report into totals by Facility. Section 2: Transform

This section allows data format to be customized to display in a different format. For example, selecting an Include item such as DOB in the Include section and then selecting the Transform dropdown shows all the different formats in which a date of birth can be displayed in a report (see below).



Include	Report Properties	Bill Body (\$)	Bill (Lines)	DID	DOB	First	Last
Bill Body (\$)	Name	\$ 45.10	443.3	# 50	-	-	-
Bill (Lines)	Report Template	\$ 5.34	44.06	33678455	12/01/88	Murray	Jacobi
DID	Expand Groups	\$ 0.49	6.31	33678456	09/16/78	Floyd	Abernathy, Jr.
DOB	Show Subtotal	\$ 0.00	2.94	33737756		Alberts	Smith
First	Show All Iterations	\$ 0.35	5.25	33678471		test	test
Last	Run on Schedule	\$ 0.76	8.2	34281041	12/01/88	Xavier	Gonzales
	Save	\$ 0.68	7.62	34281042	04/14/87	Gladys	Campostello
	Now	\$ 0.41	5.88	34281012	06/06/17	Constance	Abernathy
	Delete	\$ 2.58	19.83	34290094	03/16/97	Abe	Mueller
	Column Properties	\$ 0.36	5.2	34305623	10/19/77	Zebe	Apollos
	Field: dob	\$ 0.30	4.72	34305964	04/03/85	John	Smith
	Title	\$ 0.31	4.8	34305987	03/14/70	James	Arrowood
	Group By	\$ 0.35	4.58	34306029	02/16/15	Jerry	Matthews
	Transform	\$ 0.43	5.75	34306066	11/09/04	James	Ernest
	Type	\$ 2.11	16.23	34310800	12/01/80	Constance	Mulroney
	01/17	\$ 0.36	5.2	34311046	10/19/77	Zebe	Apollos
	01/2017	\$ 2.58	19.85	34311050	03/02/61	Jackson	Yusuf
	01/01/2017	\$ 0.32	4.88	34311052	03/04/98	Jack	Evans
	01/01/2017 08:30	\$ 0.34	5.29	34280996	05/16/65	William	Brooks
	Jan 2017	\$ 0.34	5.22	34280997	04/05/86	Alicia	Smith
	Jan-01-17	\$ 2.40	20.87	34394024	08/09/75	Amber	Bachmann
	January	\$ 0.70	7.82	34408887		Polly	
	Monday						
	Custom						
	Replace (regex)						
Exclude							
Last							
Last Modified							

- **Date columns:** Columns that have the date displayed of any kind (example, date of birth or dictated dated) have the following options available under the “Type” field:
    - 01/17 – Two digit month and two digit year separated by a “/”
    - 01/201717 – Two digit month and four digit year separated by a “/”
    - 01/01/2017 – Two digit month, two digit date and four digit year separated by a “/”
    - 01/01/2017 08:30 – Two digit month, two digit date and four digit year separated by a “/” followed by the timestamp in the format of two digit hours and two digit minutes separated by a colon.
    - Jan 2017 – Short month and four digit year
    - Jan-01-17 – Short month, two digit date and four digit year separated by a “-”
    - January – Full month
    - Monday – Full day
    - Custom – Selecting “Custom” in the dropdown adds a new field just below it named “Format” with a field that allows the user to input a custom Date format for it.
- Custom formats accepted in this field:
- “D” creates a single digit date, such as “8”
  - “DD” creates two digit date, such as “08”
  - “d” creates the number of the day with Monday being 1, Tuesday being 2, so on till Sunday being 7.
  - “dd” creates a two character date abbreviation, such as “Mo” for Monday.

- “ddd” creates a three character date abbreviation, such as “Mon” for Monday.
  - “dddd” creates the full date, such as Monday.
  - “M” creates a one digit Month abbreviation, such as “1” for January but still creates “12” for December.
  - “MM” creates a two digit Month abbreviation, such as “01” for January and “12” for December.
  - “MMM” creates a three character Month abbreviation, such as “Jan” for January.
  - “Y” creates a four digit Year, such as “2019”.
  - “YY” creates a two digit Year, such as “19” for the year “2019”.
- Replace (regex) – Selecting “Replace (regex)” in the dropdown adds two new fields just below it named “Find (regex)” and “Replace”. This feature is currently not available.
- Numeral Columns: Columns that have the date displayed of any kind (example, date of birth or dictated date) have the following options available under the “Type” field. There are two new fields
  - Type
  - Total Type

Include	Report Properties	Bill Body (\$)	Bill (Lines)
Bill Body (\$)	Name <input type="text"/>	\$ 45.10	443.3
Bill (Lines)	Report Template <input type="text"/>	\$ 5.34	44.06
DID	Expand Groups <input type="checkbox"/>	\$ 0.49	6.31
DOB	Show Subtotal <input type="checkbox"/>	\$ 0.00	2.94
First	Show All Iterations <input type="checkbox"/>	\$ 0.35	5.25
Last	Run on Schedule <input type="checkbox"/>	\$ 0.76	8.2
	Save New Delete	\$ 0.68	7.62
	Column Properties	\$ 0.41	5.88
	Field: bill_counts	\$ 2.58	19.83
	Title <input type="text" value="Bill (Lines)"/>	\$ 0.36	5.2
	Group By <input type="text"/>	\$ 0.30	4.72
Exclude	Transform	\$ 0.31	4.8
Last	Type <input type="text"/>	\$ 0.35	4.58
Last Modified	Total Type <input type="text"/>	\$ 0.43	5.75

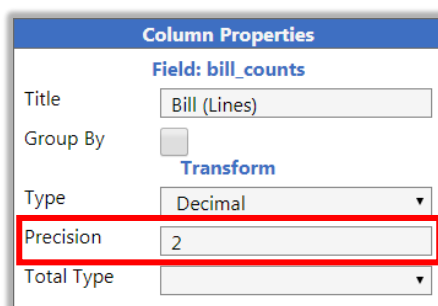
The options for the “Type” field are:

- Money – Adds a “\$” symbol in front of the number

Note: If this column already is a monetary column that produces figures in Dollars, then it would add a second “\$” symbol in front of it, so it’s advisable to not use this option for monetary columns as they already populate with the Dollar symbol.

- Decimal – Adds a new field just below the “Type” field.

This field is called “Precision” and it customizes the number of decimal places behind the number. For example, the number of decimal places in the number can be increased or decreased by changing the number from 2. The default number of decimal places is 2.



Column Properties	
Field: bill_counts	
Title	Bill (Lines)
Group By	<input type="checkbox"/>
Transform	
Type	Decimal
Precision	2
Total Type	

The top row of the report, highlighted in grey, contains the Total for the column by default. This can be altered by using the Total field. The options for this field are:

- Count – This option alters the number at the top to display the total count of rows that are populated in the Report.
- Sum – This is the default option that is displayed at the top of the Report. It provides a total sum of all numbers in the column in the Report.
- Average – This option displays the average of all numbers in the column for the entire Report.
- Standard Deviation – This option displays the Standard Deviation of all numbers in the column for the entire Report.
- Mode – This option displays the Mode of all numbers in the column for the entire Report.
- Median – This option displays the Median of all numbers in the column for the entire Report.



- Min – This option displays the minimum number of all numbers in the column for the entire Report.
- Max – This option displays the maximum number of all numbers in the column for the entire Report.
- Variance – This option displays the variance of all numbers in the column for the entire Report.

Include	Report Properties	Bill Body (\$)	Percent	DID
Bill Body (\$)	Name	\$ 45.10	443.3	# 50
Bill (Lines)	Report Template	\$ 5.34	6.31	33678455
DID	Expand Groups	\$ 0.49	6.31	33678456
DOB	Show Subtotal	\$ 0.00	2.94	33737756
First	Show All Iterations	\$ 0.35	5.25	33678471
Last	Run on Schedule	\$ 0.76	8.2	34281041
	Save New Delete	\$ 0.68	7.62	34281042
	Column Properties	\$ 0.41	5.88	34281012
	Field: bill_counts	\$ 2.58	19.83	34290094
	Title	\$ 0.36	5.2	34305623
	Group By	\$ 0.30	4.72	34305964
	Transform	\$ 0.31	4.8	34305987
Exclude	Type	\$ 0.35	4.58	34306029
Last	Total Type	\$ 0.43	5.75	34306066
Last Modified	Count	\$ 2.11	16.23	34310800
	Sum	\$ 0.36	5.2	34311046
	Average	\$ 2.58	19.85	34311050
	Standard Deviation	\$ 0.32	4.88	34311052
	Mode	\$ 0.34	5.29	34280996
	Median	\$ 0.34	5.22	34280997
	Min	\$ 2.40	20.87	34394024
	Max	\$ 0.70	7.82	34408887
	Variance			

## 5 Aggregate Report

This is a special section of the Report Builder that is only available when an X and Y axis report is created. X and Y reports by definition are built using only two column headers. The system creates a chart and assigns the first column header as the X axis (column headers left to right) and assigns the second column header as the Y-axis (row headers top to bottom).

Once the two columns have been selected, two dropdown fields appear.

- Aggregate
- Metric

Include	Report Properties
Dictated	Name <input type="text"/>
Finished	Report Template <input type="text"/>
	Expand Groups <input type="checkbox"/>
	Show Subtotal <input type="checkbox"/>
	Show All Iterations <input type="checkbox"/>
	Run on Schedule <input type="checkbox"/>
	<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Delete"/>
	Column Properties
	Field: finishedtime
	Title <input type="text" value="Finished"/>
	Group By <input type="text"/>
	Type <input type="text"/>
	<input type="button" value="Count"/> <input type="button" value="Sum"/> <input type="button" value="Average"/> <input type="button" value="Standard Deviation"/> <input type="button" value="Mode"/> <input type="button" value="Median"/> <input type="button" value="Min"/> <input type="button" value="Max"/> <input type="button" value="Variance"/>
	Aggregator <input type="text"/>
	Metric <input type="text"/>

## Aggregator

There are nine options, as stated above. Each of these options creates a line at the top of the report that provides the selected mathematical results of the information populated in the report. Aggregators available are:

Count – this displays the total number of occurrence

Sum – the total amount resulting from the addition of two or more numbers or amounts

Average – a number expressing the central or typical value in a set of numbers or amounts

Standard Deviation – a quantity expressing by how much the members of a group differ from the mean value for the group.

Mode – The mode of a set of data values is the value that appears most often.

Median - The simple measure of central tendency in a group of numbers or amounts.

Min-Max- The minimum and maximum values in a group of numbers or amounts.

Variance – The measure how far a set of numbers are spread out from their average value

A simple way to explain how this Aggregate Report section works is to look at an example. (Example 3)

#### Metric

A wide variety of metrics are available for the Y-axis of the report, see dropdown in the ReportBuilder for the list of available options.

6

#### *Report Preview*

This portion of the Report Builder section displays a dynamic view of the report's final format. Data within the report preview is for illustration purposes and will not display final/actual data.

## Report Examples

In this section, we work through setting up custom reports for custom requirements.

### Example 1

In our first example, the Transcription administrator needs to create a custom report to track all dictations that were completed on time for a specific Facility.

#### Step 1

Click the Report Builder bar in the Folder Pane. Select the column headers in the Exclude section to be used in the report and drag them one by one to the Include section. For this report, we need these columns:

DID

Facility

Dictator

Dictated Date

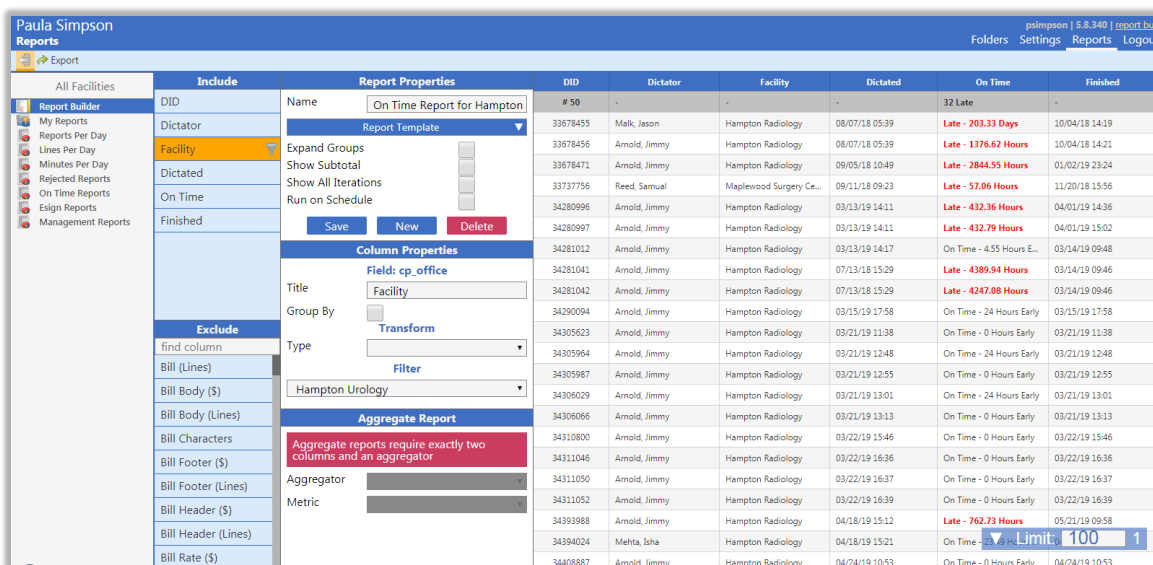
On Time

Finished Date

(see image below of column headers selected and dragged to the Include section)

#### Step 2

Name the Report: “On Time Report for Hampton Radiology”.



The screenshot shows the 'Report Builder' window for Paula Simpson. The 'Include' section contains the following columns: DID, Dictator, Facility, Dictated, On Time, and Finished. The 'Exclude' section is empty. The 'Report Properties' section shows the report name as 'On Time Report for Hampton' and the report template as 'Report Template'. The 'Column Properties' section shows the title as 'Field: cp\_office' and the group by as 'Facility'. The 'Aggregate Report' section shows the aggregator as 'Sum' and the metric as 'Limit'. The 'Table' section displays a list of dictations with columns for DID, Dictator, Facility, Dictated, On Time, and Finished. The 'On Time' column is highlighted in red, indicating late dictations. The 'Limit' is set to 100.

DID	Dictator	Facility	Dictated	On Time	Finished
33678455	Malk, Jason	Hampton Radiology	08/07/18 05:39	Late - 203.33 Days	10/04/18 14:19
33678456	Arnold, Jimmy	Hampton Radiology	08/07/18 05:39	Late - 1376.62 Hours	10/04/18 14:21
33678471	Arnold, Jimmy	Hampton Radiology	09/05/18 10:49	Late - 2844.55 Hours	01/02/19 23:24
33737756	Reed, Samuel	Maplewood Surgery Ce...	09/11/18 09:23	Late - 57.06 Hours	11/20/18 15:56
34280996	Arnold, Jimmy	Hampton Radiology	03/13/19 14:11	Late - 432.36 Hours	04/01/19 14:36
34280997	Arnold, Jimmy	Hampton Radiology	03/13/19 14:11	Late - 432.79 Hours	04/01/19 15:02
34281012	Arnold, Jimmy	Hampton Radiology	03/13/19 14:17	On Time - 4.55 Hours E...	03/14/19 09:48
34281041	Arnold, Jimmy	Hampton Radiology	07/13/18 15:29	Late - 4389.94 Hours	03/14/19 09:46
34281042	Arnold, Jimmy	Hampton Radiology	07/13/18 15:29	Late - 4247.08 Hours	03/14/19 09:46
34290094	Arnold, Jimmy	Hampton Radiology	03/15/19 17:58	On Time - 24 Hours Early	03/15/19 17:58
34305623	Arnold, Jimmy	Hampton Radiology	03/21/19 11:38	On Time - 0 Hours Early	03/21/19 11:38
34305964	Arnold, Jimmy	Hampton Radiology	03/21/19 12:48	On Time - 24 Hours Early	03/21/19 12:48
34305987	Arnold, Jimmy	Hampton Radiology	03/21/19 12:55	On Time - 0 Hours Early	03/21/19 12:55
34306029	Arnold, Jimmy	Hampton Radiology	03/21/19 13:01	On Time - 24 Hours Early	03/21/19 13:01
34306066	Arnold, Jimmy	Hampton Radiology	03/21/19 13:13	On Time - 0 Hours Early	03/21/19 13:13
34310800	Arnold, Jimmy	Hampton Radiology	03/22/19 15:46	On Time - 0 Hours Early	03/22/19 15:46
34311046	Arnold, Jimmy	Hampton Radiology	03/22/19 16:36	On Time - 0 Hours Early	03/22/19 16:36
34311050	Arnold, Jimmy	Hampton Radiology	03/22/19 16:37	On Time - 0 Hours Early	03/22/19 16:37
34311052	Arnold, Jimmy	Hampton Radiology	03/22/19 16:39	On Time - 0 Hours Early	03/22/19 16:39
34393988	Arnold, Jimmy	Hampton Radiology	04/18/19 15:12	Late - 762.73 Hours	05/21/19 09:58
34394024	Mehta, Isha	Hampton Radiology	04/18/19 15:21	On Time - 23.68 Hours	04/18/19 15:21
34408887	Arnold, Jimmy	Hampton Radiology	04/24/19 10:53	On Time - 0 Hours Early	04/24/19 10:53

### Step 3

To limit the data in the report to Hampton Radiology only, click the Facility column header in the Include section to highlight it (see image above). The Column Properties field now shows “Facility” in the “Title” field, and the “Filter” dropdown now lists all Facilities. Click the Facility dropdown and select “Hampton Radiology”. This will ensure that the Report always runs for the specific Facility.

### Step 4

Click the Save button in the Report Properties box. This creates the report and saves it in the “My Reports” section for on-going use.

## Example 2

In our second example, the Transcription administrator needs to create a custom report that tracks all “2-hr STAT dictations processed for the last three months. Once created the report needs to be automatically emailed to a list of recipients on an on-going basis. Step 1

Click the Report Builder bar in the Folder Pane. .

Select the column headers in the Exclude section to be used in the report and drag them one by one to the Include section. For this report, we need these columns:

DID

Facility

Dictator

Dictated Date

TAT

### Step 2

Name the Report: “Quarterly 2hr STAT for Hampton Rad”.

Check the “Run on Schedule” checkbox. This opens a new section called “Schedule”.

Use the “Run...” dropdown to select “Quarterly”.

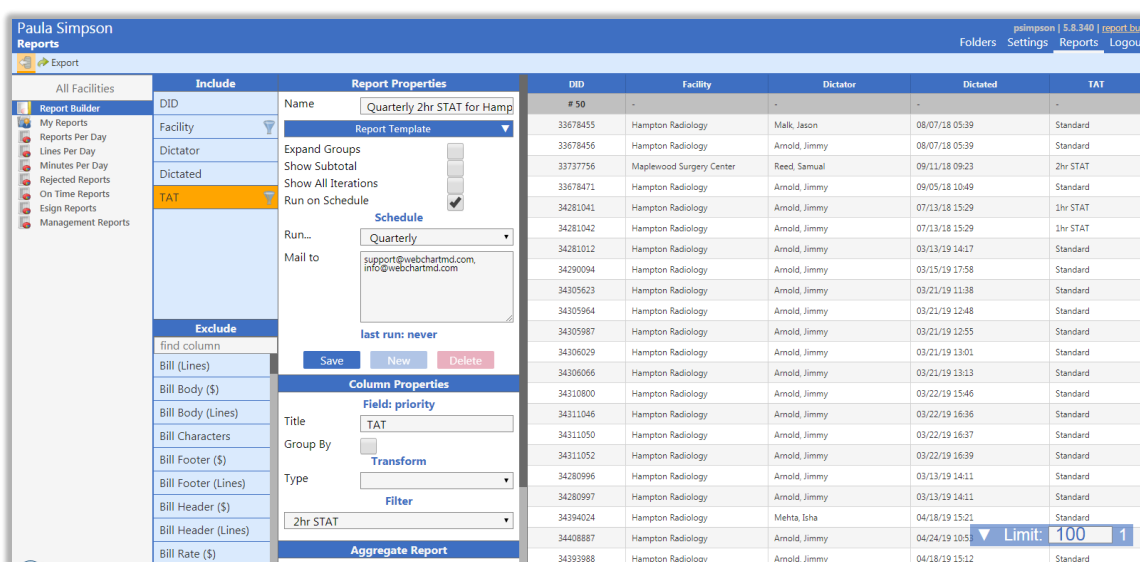
Add email addresses of recipients for the report. In the example illustration below we have added “support@webchartmd.com” on one line and “info@webchartmd.com” on the next line in the “Mail to” field.

Once email addresses have been added, a pop-up box will ask the user if the email addresses are correct. Click “Yes” on the popup. (see picture)

### Step 3

Click Facility in the Include section, then change the Filter under “Column Properties” to select “Hampton Radiology”. This will ensure that the Report always runs for the specific Facility.

Next, click TAT in the Include section, and change the Filter under “Column Properties” to select “2 hr STAT”. This will ensure that the Report always runs for the specific STAT priority.



#	DID	Facility	Dictator	Dictated	TAT
33678455		Hampton Radiology	Malk, Jason	08/07/18 05:39	Standard
33678456		Hampton Radiology	Arnold, Jimmy	08/07/18 05:39	Standard
33737756		Maplewood Surgery Center	Reed, Samuel	09/11/18 09:23	2hr STAT
33678471		Hampton Radiology	Arnold, Jimmy	09/05/18 10:49	Standard
34281041		Hampton Radiology	Arnold, Jimmy	07/13/18 15:29	1hr STAT
34281042		Hampton Radiology	Arnold, Jimmy	07/13/18 15:29	1hr STAT
34281012		Hampton Radiology	Arnold, Jimmy	03/13/19 14:17	Standard
34290094		Hampton Radiology	Arnold, Jimmy	03/15/19 17:58	Standard
34305623		Hampton Radiology	Arnold, Jimmy	03/21/19 11:38	Standard
34305964		Hampton Radiology	Arnold, Jimmy	03/21/19 12:48	Standard
34305987		Hampton Radiology	Arnold, Jimmy	03/21/19 12:55	Standard
34306029		Hampton Radiology	Arnold, Jimmy	03/21/19 13:01	Standard
34306066		Hampton Radiology	Arnold, Jimmy	03/21/19 13:13	Standard
34310800		Hampton Radiology	Arnold, Jimmy	03/22/19 15:46	Standard
34311046		Hampton Radiology	Arnold, Jimmy	03/22/19 16:36	Standard
34311050		Hampton Radiology	Arnold, Jimmy	03/22/19 16:37	Standard
34311052		Hampton Radiology	Arnold, Jimmy	03/22/19 16:39	Standard
34280996		Hampton Radiology	Arnold, Jimmy	03/13/19 14:11	Standard
34280997		Hampton Radiology	Arnold, Jimmy	03/13/19 14:11	Standard
34394024		Hampton Radiology	Mehta, Isha	04/18/19 15:21	Standard
34408887		Hampton Radiology	Arnold, Jimmy	04/24/19 10:55	Standard
34393988		Hampton Radiology	Arnold, Jimmy	04/18/19 15:12	Standard

### Step 4

Click the Save button in the Report Properties box. This creates the report and saves it in the “My Reports” section for on-going use.

### Example 3

In our third example, the Transcription administrator needs a running daily bill total for each Dictator. This kind of report is an X-axis / Y-axis report and uses the “Aggregate Report” feature.

### Step 1

Click the Report Builder bar in the Folder Pane. The column headers that need to be dragged and dropped from the Exclude section to the Include section are:

Dictator

Dictated Date

Step 2


Name the Report: "Daily Bill Total Per Dictator".

Step 3

In the Aggregate dropdown, select "Sum", and in the Metric dropdown select "Bill Total (\$)" so that the report populates with Bill Totals in US Dollar amounts.

- 1 Dictator - first Column header in the Include section becomes the X axis
- 2 Dictated Date - second column header in the Include section becomes the Y axis

Step 4 Click on the Save button.



**Report Properties**

**Report Template**

Expand Groups  
Show Subtotal  
Show All Iterations  
Run on Schedule

Save New Dictated

**Column Properties**

Field: dictateddate  
Title: Dictated  
Group By:   
Type:   
Filter:   
Transform:   
Y-axis - Dictated Date

**Aggregate Report**

X: Dictator  
Y: Dictated  
Aggregator: Sum  
Metric: Bill Total (\$)

Dictated	Total	Arnold, Jimmy	Fairchild, April	Johnson, Jimmy	Malk, Jason	Mehta, Isha	Reed, Samual	Renault, James
07/13/18 15:29	\$ 2.06	\$ 2.06	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
08/07/18 05:39	\$ 6.55	\$ 0.82	\$ 0.00	\$ 0.00	\$ 5.73	\$ 0.00	\$ 0.00	\$ 0.00
09/05/18 10:49	\$ 0.68	\$ 0.68	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
09/11/18 09:23	\$ 0.37	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.37	\$ 0.00
03/13/19 14:11	\$ 1.37	\$ 1.37	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/13/19 14:17	\$ 0.76	\$ 0.76	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/15/19 17:58	\$ 2.58	\$ 2.58	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/21/19 11:38	\$ 0.68	\$ 0.68	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/21/19 12:48	\$ 0.61	\$ 0.61	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/21/19 12:55	\$ 0.62	\$ 0.62	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/21/19 13:01	\$ 0.60	\$ 0.60	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/21/19 13:13	\$ 0.75	\$ 0.75	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/22/19 15:46	\$ 2.11	\$ 2.11	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/22/19 16:36	\$ 0.68	\$ 0.68	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/22/19 16:37	\$ 2.58	\$ 2.58	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
03/22/19 16:39	\$ 0.63	\$ 0.63	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
04/18/19 15:12	\$ 0.69	\$ 0.69	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
04/18/19 15:21	\$ 2.71	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 2.71	\$ 0.00	\$ 0.00
04/24/19 10:53	\$ 1.02	\$ 1.02	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
05/23/19 15:30	\$ 3.45	\$ 3.45	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
05/23/19 15:34	\$ 0.88	\$ 0.88	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
06/21/19 13:51	\$ 0.21	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.21

Limit: 100 1

## Premade Reports

Reports Per Day – This report can be run by either Dictator or Transcriptionist and will show the total number of reports finished (by day) for a given time frame.

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

Minutes Per Day – This report can be run by Dictator or Transcriptionist and will show the total number of phone minutes dictated and processed (by day) for a given time frame.

Rejected Reports – This report can be run by Dictator or Transcriptionist and will show the total number of rejected transcriptions (by day) for a given period of time.

On Time Reports – This report can be run by Dictator or Transcriptionist. The report run by dictator will show the total number of reports completed for a given period of time with detailed information as well as their OnTime status. The report run by Transcriptionist will show the total number of onTime reports finished (by day) for a given period of time.

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

Management Reports – This section holds a selection of additional pre-made reports useful to Transcription teams for account and staff management.



## Appendix 1: Creating a Template

### Introduction

WebChartMD stores and manages templates (sometimes called work types) used in the transcription workflow. Templates are created using Microsoft Word, and then uploaded to the Template Manager (see page 191 for information on the Template Manager). Once uploaded, templates are edited and managed from within the Template Manager.

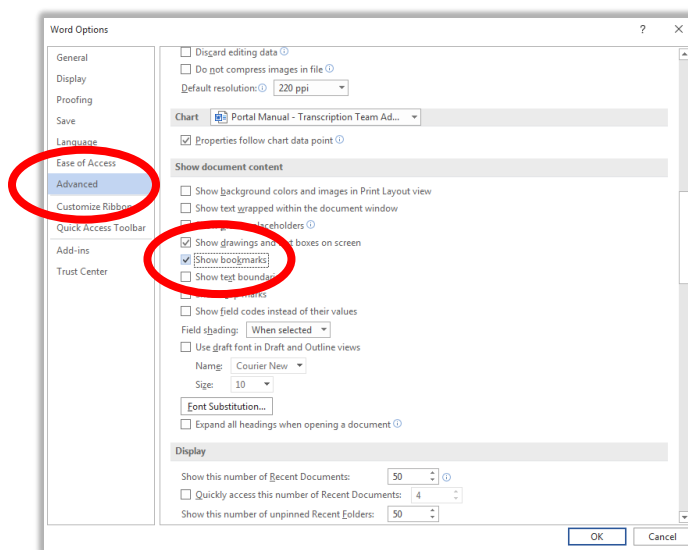
### Steps to Creating a Template

#### Step 1

Open a blank document in Microsoft Word. (Note: WebChartMD is compatible with Word versions 2003 through 2019.)

WebChartMD's template software incorporates a Microsoft Word feature called "bookmarks". Bookmarks are used to automatically insert data into a document. By default, bookmarks are hidden in Microsoft Word, and so the first step in the template creation process is to make the bookmarks visible, or "show" them. To show the bookmarks, go to:

- File in the top left, then Options.
- On the Options window, click Advanced on the left menu.
- In the "Show Document Content" section see "Show bookmarks". Place a check in the checkbox and click OK. This makes bookmarks visible within the Word document. See image below for more details.



## Step 2

Now that bookmarks are visible, the next step is to begin creating the template. WebChartMD places no limitations on the appearance or layout of a template. Margins, icons, logos, special characters, headers and footers – anything can be added to a template that is required to meet the client’s formatting specifications.

Templates are often created by using an existing document sample as a reference. In the example below, an existing Letter is used as the starting point for the creation of a CT Scan template:

**Hampton Radiology Center**  
504 West Mission Avenue #101 – Hampton, TN 37624 – (423) 747-1980

**CT SCAN**

**NAME:** [Benne, David]

**MRN:** [119228]

**DOB:** [10/19/1977]

**EXAM:** CT Neck

**CLINICAL:** CT REPORT - Soft Tissue Neck

**HISTORY:** This is a middle-aged male with an epiglottic mass, odynophagia, and involvement of the left aryepiglottic fold, piriform sinus, and vallecula. High resolution transaxial images were obtained with reformatted sagittal and coronal images.

**FINDINGS:** There is a lobulated mass lesion of the epiglottis measuring approximately 22 x 16 x 30 mm (mediolateral x AP x craniocaudal) in size. There is an infiltrative mass like lesion extending into the pre-epiglottic space.

**IMPRESSION:** Epiglottic mass lesion with probable invasion of the glossoepiglottic fold and pre-epiglottic space with invasion of the bilateral aryepiglottic folds. Bilateral deep cervical nodal disease involving bilateral Level II, Level III and left Level IV.

---

**Marvin A. Sanders, MD, DMRD, Chief Radiologist**  
Diplomate American Board of Radiology

**[MJS]**  
D: [1/13/2022 3:45 PM]  
T: [1/26/2022 3:59 PM]

Page 1 of 1  
[Benne, David]

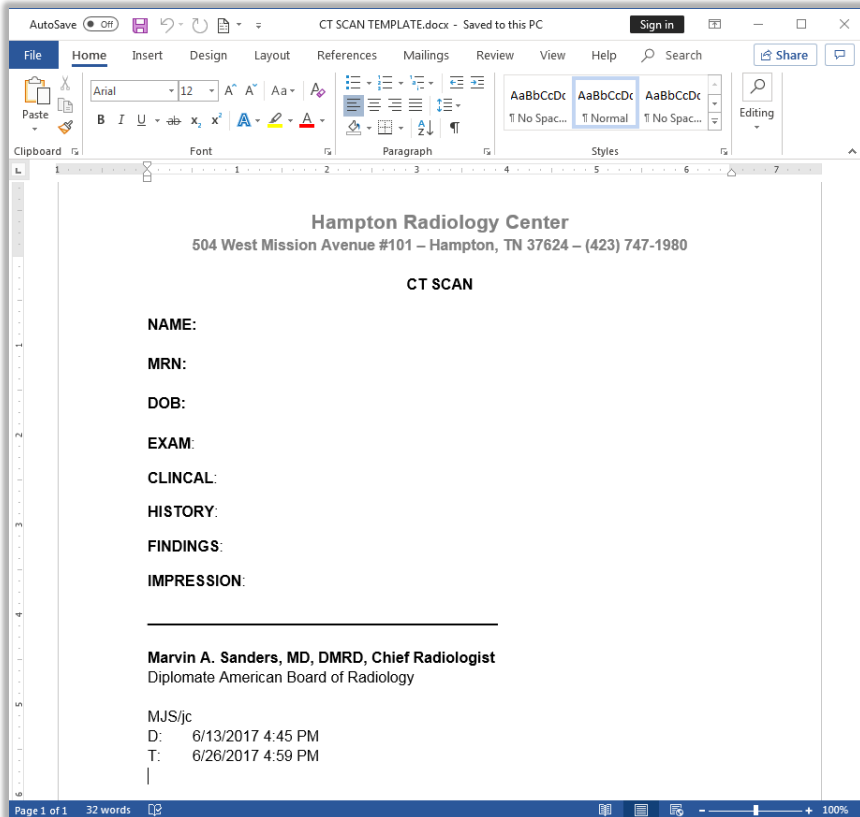
In the above sample note, we see there are number of fields in which patient information or other information related to the document is seen. Each of these fields can be created within the template using bookmarks so that the fields will automatically populate with data in the transcription workflow.

The use of bookmarks to automatically populate data into documents is a powerful efficiency tool that can be used to enter a wide array of data. Over 100 different bookmarks are available within WebChartMD. A full list of those bookmarks is available in Appendix 2.

For the sake of this exercise, our Office Note template requires the following bookmarks to be added to the template:

Name: Last, First  
MRN: in bold  
DOB: in bold  
Dictator Name and credentials: in bold  
Date Dictated  
Date Transcribed  
Name: Last, First in the Footer.

After removing all patient-specific information from our sample Office Note, the remaining structure of the document looks like this:



AutoSave OFF CT SCAN TEMPLATE.docx - Saved to this PC Sign in

File Home Insert Design Layout References Mailings Review View Help Search Share

Clipboard Font Paragraph Styles Editing

Hampton Radiology Center  
504 West Mission Avenue #101 – Hampton, TN 37624 – (423) 747-1980

CT SCAN

NAME:  
MRN:  
DOB:  
EXAM:  
CLINICAL:  
HISTORY:  
FINDINGS:  
IMPRESSION:

Marvin A. Sanders, MD, DMRD, Chief Radiologist  
Diplomate American Board of Radiology

MJS/jc  
D: 6/13/2017 4:45 PM  
T: 6/26/2017 4:59 PM

Page 1 of 1 32 words 100%



Now that our basic document format or template is defined, let's add the needed bookmarks to automatically populate the data required into the template for use by the transcriptionists.

### Step 3

#### Choosing the correct Bookmark

The next step is to choose the bookmark from the WebChartMD Bookmark Definitions list (Appendix 2) that correlates to the desired format. The list contains a wide variety of format options, such as placing last name followed by first name or first name followed by last name.

Examples:

WCMD\_NAME bookmark name populates the patient name as Jack Louis Morrow, their full name.

WCMD\_NAME\_LASTFIRST bookmark name populates the patient name as Morrow, Jack Louis, their name as Last name first, and first name with middle name in full.

WCMD\_NAME\_LASTFIRST\_MIDDILEINITIAL bookmark name populates the patient name as Morrow, Jack L., their name as last name first, and first name with middle initial.

Once the needed bookmark has been identified, it can be inserted into the template.

### Step 4

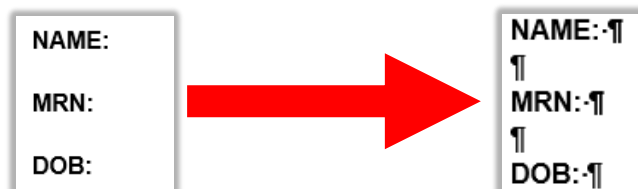
#### Adding a Bookmark

To add a bookmark to the template:

1. place the cursor at the location on the document where the information needs to insert. If a space should be present between the preceding character and the inserted data, please mindful to add the needed space. For example, in adding a bookmark following a template element like "Name:", a space is required following the colon (:), or else the document will have the following appearance:

Name:Jack Louis Morrow

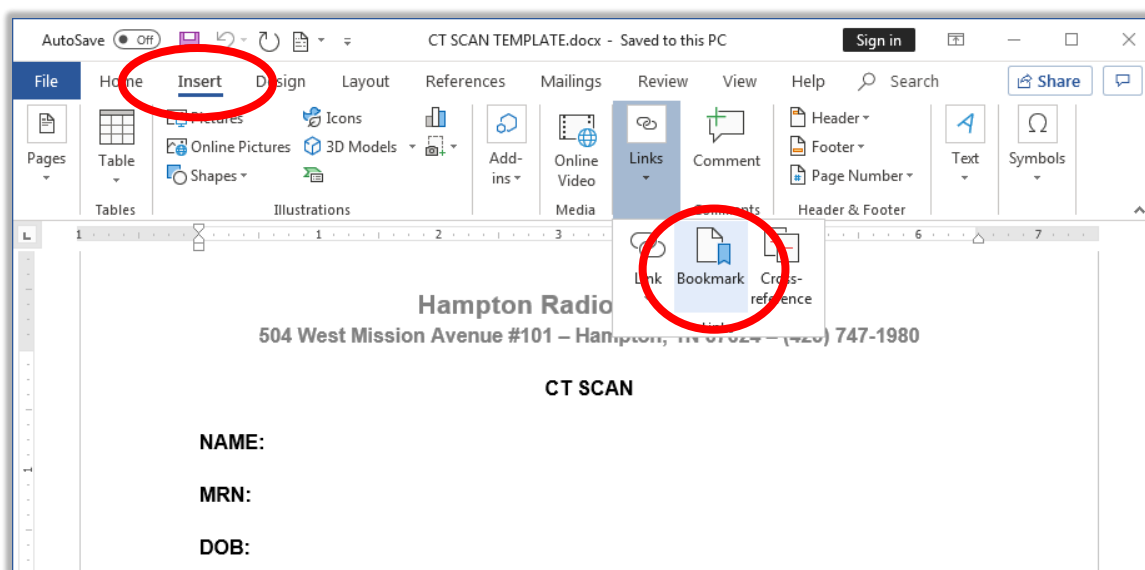
Using the Show/Hide control in the toolbar will help ensure that formatting is correct. The addition of a space displays a small black dot (as a placeholder for the space). Place the cursor after this dot as the correct place for the insertion of the bookmark.



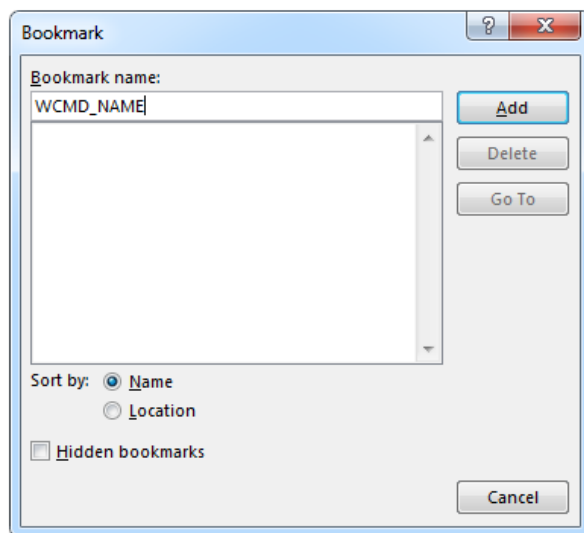
In the image above, the Name has the small black dot (as a placeholder for the space) added after the “.” symbol but the MRN and DOB lines don’t have it after the colon symbol. Having this space will populate the name as:

Name: Jack Louis Morrow

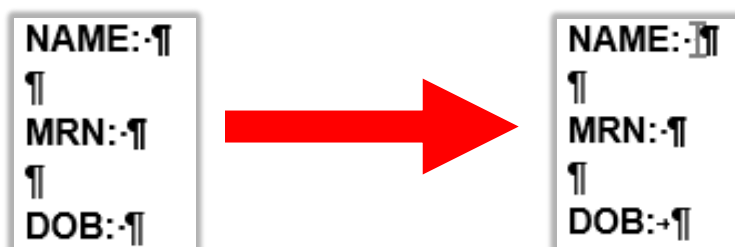
2. Once the cursor is in place, click “Insert” tab in the ribbon, and select “Bookmark” under Links, as shown below.



3. After clicking the Bookmark button, the “Bookmark” box appears. Type the selected Bookmark name to the field at the top of the box.



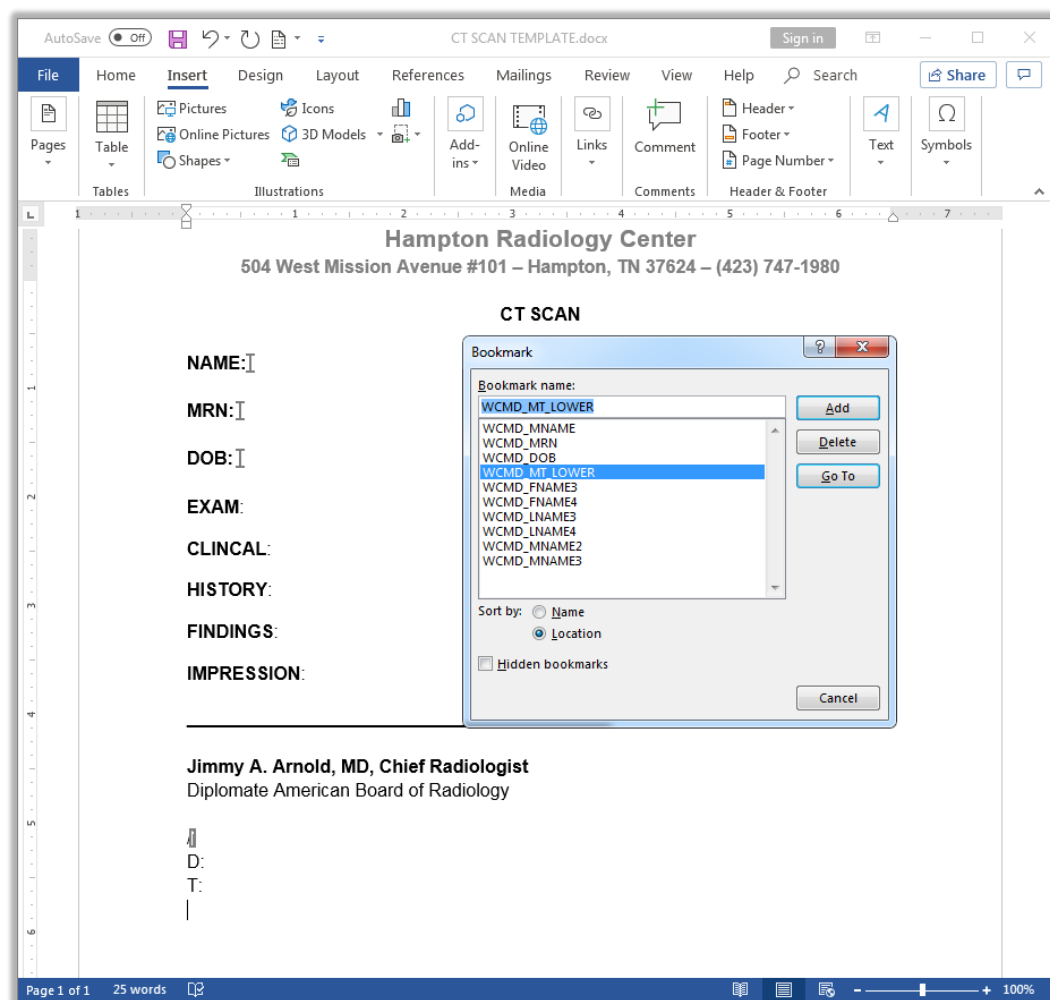
4. Once the Bookmark name is in place, click the Add button. This will insert the bookmark at the current cursor location. The bookmark is indicated by the light grey (capital) i symbol.



#### Step 5

This same procedure is used for adding each of the bookmarks needed in the document.

As bookmarks are created, they appear in the larger box in the Bookmark box (see image below).



#### Notes on Adding Bookmarks:

1. Bookmarks must be added in ALL CAPS and in the exact format shown in the Bookmark Definitions document. Check for mis-spells and formatting errors if a bookmark doesn't load upon testing.
2. Handling date entries.

A wide variety of date formats are available in the Bookmark Definitions document. In the event that the format needed is not listed in the Bookmarks Definition document, custom formats can be created

by adding the needed format directly into the bookmark. For example, if a leading zero is called for in a date format using slash-marks, e.g. 02/03/2020, that format can be custom added as follows:

1. type the desired format, and highlight / select it, as in the example below:



Date:dd/MM/yyyy

While leaving the date highlighted/selected, add the bookmark to the document. In the case below, the WCMD\_DOB bookmark was added:



Date:dd/MM/yyyy

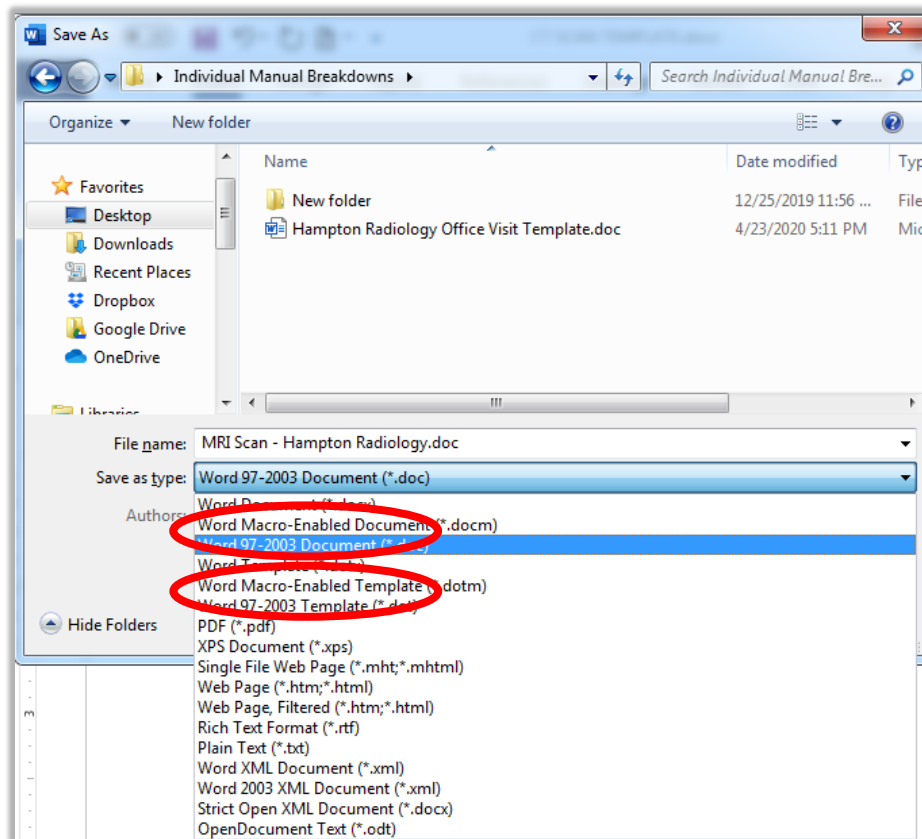
Once added, the gray bookmark brackets appear at the beginning and end of the date format. When the date now loads into the bookmark via the workflow, it will conform to the custom format added to the bookmark. This same approach can be used for any custom date format needed, such as using dashes instead of slash-marks (e.g. 2-1-2020 format by using “d-M-yyyy”).

## Step 6

Once the template is built, use the “Save as Type” dropdown in the “Save As” box to save the template in either a “.doc” or “.dot” format only. .docx or .dotx format are not compatible with the Template Manager and will not save correctly.

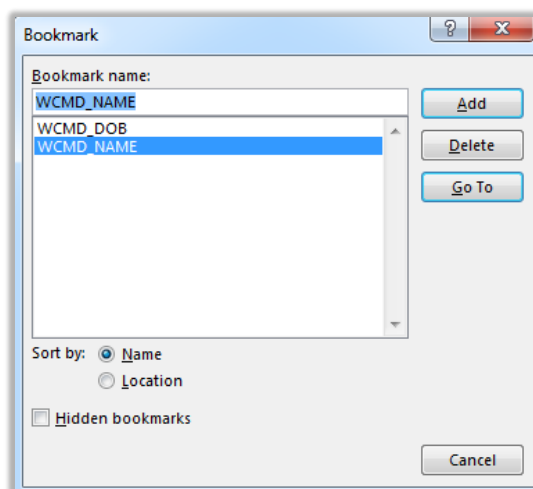
To save a file as .doc or .dot, always change the “Save as type” below the “File name” field to “Word 97-2003 Document (\*.doc)” or the “Word 97-2003 Document (\*.dot)” as shown below.





## Editing a Bookmark

1. open the Bookmark box from the Microsoft Word toolbar and highlight the bookmark to be edited. When highlighted, the bookmark populates into the top box of the Bookmark box (see below).



2. Make the needed correction to the bookmark and click “Add”. The corrected bookmark should now show in the list of bookmarks in the larger box within the Bookmark box.
3. Highlight the incorrect bookmark that was replaced in the larger box, and press “Delete” to remove the incorrect bookmark.

### Deleting a Bookmark

To delete a bookmark, select the bookmark that needs to be deleted, and then click on the Delete button. This will remove the bookmark from the document.

### Adding Multiple Instances of the Same Bookmark

If a demographic or other piece of data needs to appear in multiple places within a document, the bookmark used needs a numerical suffix added for each use.

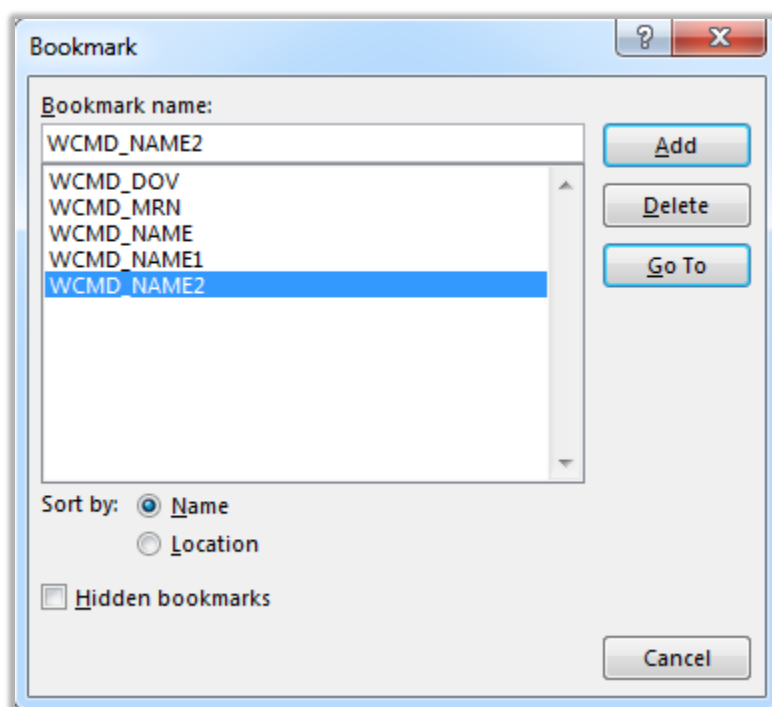
For example, in the below Bookmark box example, the template calls for the patient's name to appear multiple times within the document (such as at the top of the document, but a second time in the document footer and a third time in the document body, where it appears once).

This calls for three separate uses of the bookmark WCMD\_NAME. In order for the same bookmark to be used three times, the addition of the suffix "1" and "2" to be added to the bookmark on each subsequent use after the initial addition of WCMD\_NAME. As a result, the bookmark appears in the bookmark list three times:

WCMD\_NAME: this is the bookmark added for the placement of the patient name in the document's initial demographics.

WCMD\_NAME1: this is the bookmark placed in the document footer.

WCMD\_NAME2: this is the bookmark placed within the body of the document where called for by the template/document specifications.



## Appendix 2: Bookmark Definitions

Bookmark name	Description	Example
WCMD_MRN	Patient's unique identifier	Could be SSN, Chart number, ID number, etc.
WCMD_NAME	Patient's Full name	Jack Louis Morrow
WCMD_NAME_UPPER	Patient's Full name, upper case	JACK LOUIS MORROW
WCMD_NAME_FIRSTANDLAST	Patient's first and last name	Jack Morrow
WCMD_NAME_FIRSTANDLAST_UPPER	Patient's first and last name, upper case	JACK MORROW
WCMD_NAME_LASTFIRST	Patient's last name, first name middle name	Morrow, Jack Louis
WCMD_NAME_LASTFIRST_UPPER	Patient's last name, first name middle name upper case	MORROW, JACK LOUIS
WCMD_NAME_LASTFIRST_MIDDLEINITIAL	Patient's last name, first name middle initial	Morrow, Jack L.
WCMD_NAME_LASTFIRST_MIDDLEINITIAL_UPPER	Patient's last name, first name middle initial upper case	MORROW, JACK L.
WCMD_NAME_LASTFIRST_MIDDLE	Patient's last name, first name	Morrow, Jack
WCMD_NAME_LASTFIRST_MIDDLE_UPPER	Patient's last name, first name upper case	MORROW, JACK
WCMD_FNAME	Patient's First name	Jack
WCMD_FNAME_UPPER	Patient's First name, upper case	JACK
WCMD_MNAME	Patient's Middle name	Larry or L. depending on data entered in field.
WCMD_MNAME_UPPER	Patient's Middle name, upper case	
WCMD_MIDDLE_INITIAL	Inserts first letter of patient's middle name and adds a period	M.

Bookmark name	Description	Example
WCMD_NAME_MIDDLEINITIAL	Patient's name with middle initial	Jack L. Morrow
WCMD_NAME_MIDDLEINITIAL_UPPER	Patient's name with middle initial, upper case	JACK L. MORROW
WCMD_LNAME	Patient's Last name	Morrow
WCMD_LNAME_UPPER	Patient's Last name, upper case	MORROW
WCMD_DOB	Date of Birth	1/1/2008
WCMD_DOB_LONG	Date of Birth long format	January 1, 2008
WCMD_DOB_LONG_UPPER	Date of Birth long format upper case	JANUARY 1, 2008
WCMD_DOB_LONG_SUFFIX	Date of Birth long format with suffix	January 1st, 2008
WCMD_DOB_LONG_SUFFIX_UPPER	Date of Birth long format upper case with suffix	JANUARY 1st, 2008
WCMD_DOV	Date of Visit	1/1/2008
WCMD_DOV_LONG	Date of Visit for letters	January 1, 2008
WCMD_DOV_LONG_UPPER	Date of Visit for letters, uppercase	JANUARY 1, 2008
WCMD_DOV_LONG_SUFFIX	Date of Visit for letters with suffix	January 1st, 2008
WCMD_DOV_LONG_SUFFIX_UPPER	Date of Visit for letter with suffix, uppercase	JANUARY 1st, 2008
WCMD_ADMIT_DATE	The date admitted <sup>1</sup>	1/1/2008
WCMD_ADMIT_DATE_LONG	The date admitted, long format <sup>1</sup>	January 1, 2008
WCMD_ADMIT_DATE_LONG_SUFFIX	The date admitted, long format with suffix <sup>1</sup>	January 1 <sup>st</sup> , 2008
WCMD_ADMIT_DATE_LONG_UPPER	The date admitted, long format, upper case <sup>1</sup>	JANUARY 1, 2008
WCMD_ADMIT_DATE_LONG_SUFFIX_UPPER	The date admitted, long format, upper case with suffix <sup>1</sup>	JANUARY 1 <sup>st</sup> , 2008
WCMD_POINT_OF_CARE	Part of patient visit information. Must come from an ADT feed <sup>1</sup>	1W23K8TY

Bookmark name	Description	Example
WCMD_DISCHARGE_DATE	Date patient is discharged <sup>1</sup>	1/1/2008
WCMD_DISCHARGE_DATE_LONG	Date patient is discharged long format <sup>1</sup>	January 1, 2008
WCMD_DISCHARGE_DATE_LONG_UPPER	Date patient is discharged long format upper case <sup>1</sup>	JANUARY 1, 2008
WCMD_DISCHARGE_DATE_LONG_SUFFIX	Date patient is discharged long format with suffix <sup>1</sup>	January 1st, 2008
WCMD_DISCHARGE_DATE_LONG_SUFFIX_UPPER	Date patient is discharged long format with suffix upper case <sup>1</sup>	JANUARY 1 <sup>st</sup> , 2008
WCMD_FACILITY_ID	Facility ID, must come from an ADT feed <sup>1</sup>	
WCMD_ROOM_NUMBER	Room number patient was seen. Must come from an ADT feed <sup>1</sup>	150
WCMD_BED_NUMBER	Bed number patient stayed in. Must come from an ADT feed. <sup>1</sup>	150
WCMD_AGE	Patient's Age	39
WCMD_SEX	Patient's sex abbreviated	M
WCMD_SEX_LONG	Patient's sex fully spelled out	Male
WCMD_SEX_LONG_UPPER	Patient's sex fully spelled out in upper case	MALE
WCMD_CLINIC_NOTE	A free text field for notes to the clinic	Patient is diabetic
WCMD_DEPARTMENT_NAME	Name of the Department <sup>1</sup>	Radiology
WCMD_PRIMARY_CC	Primary recipient name and address	Frank Smith, MD Internal Medicine Associates 100 Main Street Newton, MA 02115

Bookmark name	Description	Example
WCMD_PRIMARY_CC_WITHPHONE	The normal primary CC block with the phone number on a new line after the text "Phone:"	Frank Smith, MD Internal Medicine Associates 100 Main Street Newton, MA 02115 Phone: (877)-858-6677
WCMD_PRIMARY_CC_WITHFAX	The normal primary CC block with the fax number on a new line after the text "Fax:"	Frank Smith, MD Internal Medicine Associates 100 Main Street Newton, MA 02115 Fax: (877)-858-6677
WCMD_PRIMARY_CC_WITHPHONEANDFAX	The normal primary CC block with the phone number on a new line after the text "Phone:" and the fax number on a new line after the text "Fax:"	Frank Smith, MD Internal Medicine Associates 100 Main Street Newton, MA 02115 Phone: (877)-858-6677 Fax: (877)-858-6677
WCMD_PRIMARY_CC_NAMEANDFAX_BELOW_PREFIX	Name and fax number on the next line of the primary CC with prefix.	Dr. John Smith, MD Fax: (000) 000-0000
WCMD_PRIMARY_CC_NAME	Primary CC name, without address.	Frank Smith, MD
WCMD_PRIMARY_CC_PHONE	Primary CC phone number without name and address	Phone: (877)-858-6677
WCMD_PRIMARY_CC_FAX	Inserts primary CC's fax number Mirrors WCMD_PRIMARY_FAX.	(000) 000-0000
WCMD_CC_NAMEANDFAX	CC name and fax side by side	John Smith, MD - (555)-555-5555
WCMD_CC_NAMEANDFAX_BELOW	Name and fax number on the next line of all attached CCs. Each cc still has a new line between them	Dr. John Smith, MD (000) 000-0000

Bookmark name	Description	Example
WCMD_CC_NAMEANDFAX_BELLOW_PREFIX	Name and fax number on the next line of all attached CCs. Each cc still has a new line between them with prefix	Dr. John Smith, MD Fax: (000) 000-0000
WCMD_CC	Name of CC recipient	Frank Smith, MD
WCMD_CC_PHONE	Inserts CC's phone numbers for all CC's.	(000) 000-0000
WCMD_CC_FAX	Inserts CC's fax numbers for all CC's. mirrors WCMD_FAX, added to make naming more clear/consistent	(000) 000-0000
WCMD_CC_MAILING	Inserts CC's addresses for all CC's.	Internal Medicine Associates 100 Main Street Newton, MA 02115
WCMD_CC_MAILING_WITHPHONE	Inserts CC's addresses & Phone numbers for all CC's	Internal Medicine Associates 100 Main Street Newton, MA 02115 Phone: (877)-858-6677
WCMD_CC_MAILING_WITHFAX	Inserts CC's addresses & Fax numbers for all CC's.	Internal Medicine Associates 100 Main Street Newton, MA 02115 Fax: (877)-858-6677
WCMD_CC_MAILING_WITHPHONEANDFAX	Inserts CC's addresses, phone Numbers, & Fax numbers for all CC's.	Internal Medicine Associates 100 Main Street Newton, MA 02115 Phone: (877)-858-6677 Fax: (877)-858-6677
WCMD_MT	Transcriptionist's Initials	SB
WCMD_MT_LOWER	Transcriptionist Initials, lower case	sb



Bookmark name	Description	Example
WCMD_DT_TRANS	Date of Transcription	1/1/2008
WCMD_DT_TRANS_LONG	Date of Transcription, Long	January 1, 2008
WCMD_DT_TRANS_LONG_SUFFIX	Date of Transcription, Long with suffix	January 1st, 2008
WCMD_DT_TRANS_LONG_UPPER	Date of Transcription, Long, upper case	JANUARY 1, 2008
WCMD_DT_TRANS_LONG_SUFFIX_UPPER	Date of Transcription, Long, upper case with suffix	JANUARY 1st, 2008
WCMD_DT_DICT	Date of Dictation	1/1/2008
WCMD_DT_DICT_LONG	Date of Dictation, Long	January 1, 2008
WCMD_DT_DICT_LONG_UPPER	Date of Dictation, Long, upper case	JANUARY 1, 2008
WCMD_DT_DICT_LONG_SUFFIX	Date of Dictation, Long with suffix	January 1st, 2008
WCMD_DT_DICT_LONG_SUFFIX_UPPER	Date of Dictation, Long, upper case with suffix	JANUARY 1st, 2008
WCMD_DT_UPLOADED	Date of Dictation Upload	1/1/2008
WCMD_DT_UPLOADED_LONG	Date of Dictation Upload, Long	January 1, 2008
WCMD_DT_UPLOADED_LONG_UPPER	Date of Dictation Upload, Long, upper case	JANUARY 1, 2008
WCMD_DT_UPLOADED_LONG_SUFFIX	Date of Dictation Upload, Long with suffix	January 1st, 2008
WCMD_DT_UPLOADED_LONG_SUFFIX_UPPER	Date of Dictation Upload, Long, upper case with suffix	JANUARY 1st, 2008
WCMD_TM_TRANS	Time of Transcription	3:48 PM
WCMD_TM_DICT	Time of Dictation	3:48 PM
WCMD_CP	Care Provider Initials, CAPS	JG
WCMD_CP_LOWER	Care Provider Initials, lower case	jg
WCMD_CP_FNAME	Care Provider First Name	John
WCMD_CP_MNAME	Care Provider Middle Name	Jo

Bookmark name	Description	Example
WCMD_CP_LNAME	Care Provider Last Name	Jameson
WCMD_DICTATOR_SIG	First Name, Last Name & credentials	Frank W. Smith, MD, FAACP
WCMD_REPORT_TYPE	Report type, mirrors WCMD_RTYPE	Surgical Note
WCMD_WORKTYPE	Work type	H&P
WCMD_WORKTYPE_KEY	The clients unique worktype identifier	03 or OP
WCMD_MTID	Transcriptionist's ID number	734
WCMD_DID	Dictation ID number	1023912
WCMD_ICD9	ICD9 or billing code	732.34
WCMD_INTERFACE_PRACTITIONER_ID	Interface ID for Practitioners <sup>1</sup>	1057284
WCMD_INTERFACE_JOB_NUMBER	Interface Job Number <sup>1</sup>	4868606
WCMD_ENCOUNTER_ID	Patients visit number <sup>1</sup>	4004949
WCMD_JOBID_PHONE	The Job ID that the provider would have received while dictating via phone	000000 (6 digits)
WCMD_DEPARTMENT_ID	Number that identifies a department <sup>1</sup>	Radiology department 18E10FT498
WCMD_LOCATION	Provider's office location	Chicago
WCMD_ESIGN	Allows for customized placement of the provider's e-signature. In the absence of the WCMD_ESIGN bookmark, the e-sign statement will be placed at the end of the document.	***** Document e-signed by Jimmy Arnold, MD, FACP on Thursday, August 13, 2009 at 10:53 AM *****
WCMD_ESIGN_1 WCMD_ESIGN_2 ... WCMD_ESIGN_9 WCMD_ESIGN_10	For documents being counter signed, the counter signer's signatures can be custom located by using WCMD_ESIGN_1 through WCMD_ESIGN_10 Each number	***** Document e-signed by Jimmy Arnold, MD, FACP on Thursday, August 13, 2009 at 10:53 AM *****

	represents a tier of the counter sign process.	
WCMD_CUSTOM_A WCMD_CUSTOM_B WCMD_CUSTOM_C WCMD_CUSTOM_D WCMD_CUSTOM_E WCMD_CUSTOM_F WCMD_CUSTOM_G	Bookmarks to allow for custom text in the document at specific places. The information can be populated into these from the Document Properties window using the Bookmarks button.	*****Customizable entry that benefits the user*****

## Appendix 3: Express Scribe

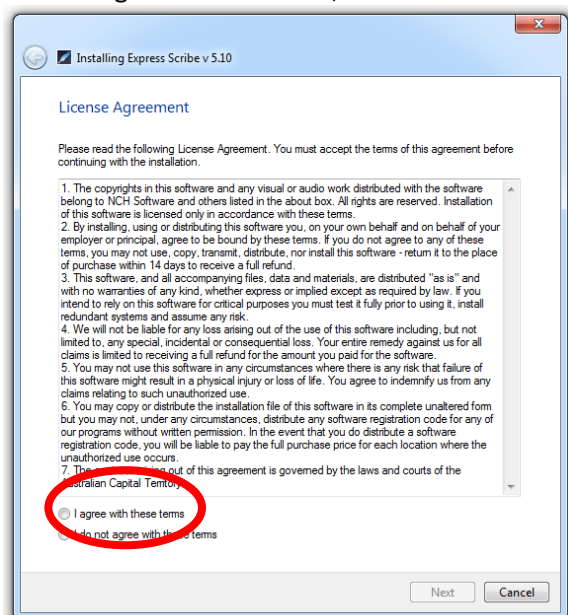
The Express Scribe version 5.10 can be downloaded from our Downloads page at [www.webchartmd.com/downloads](http://www.webchartmd.com/downloads). It is listed as 'Express Scribe Setup'.



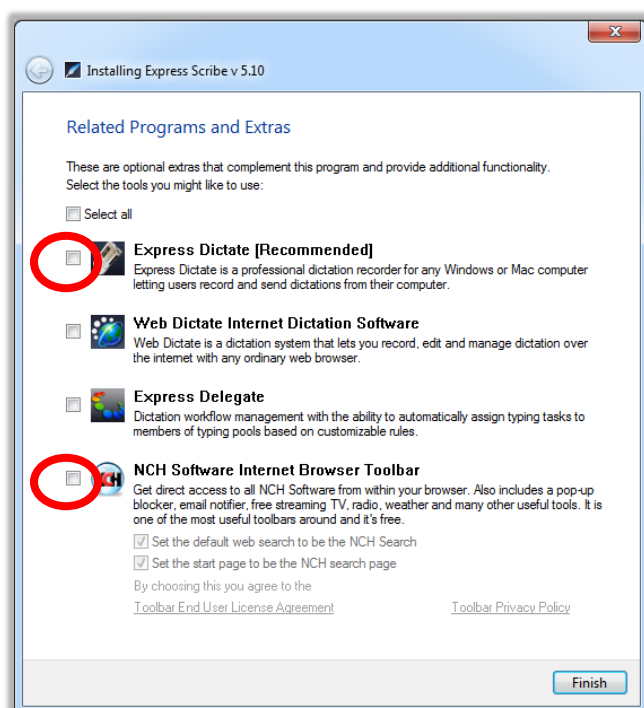
This version of Express Scribe can play the dss, mp3, wma and wav formats but is incompatible with .ds2 format. It can be installed on Windows 7, Windows 8 and Windows 10 machines.

### For Windows 7 users:

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



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

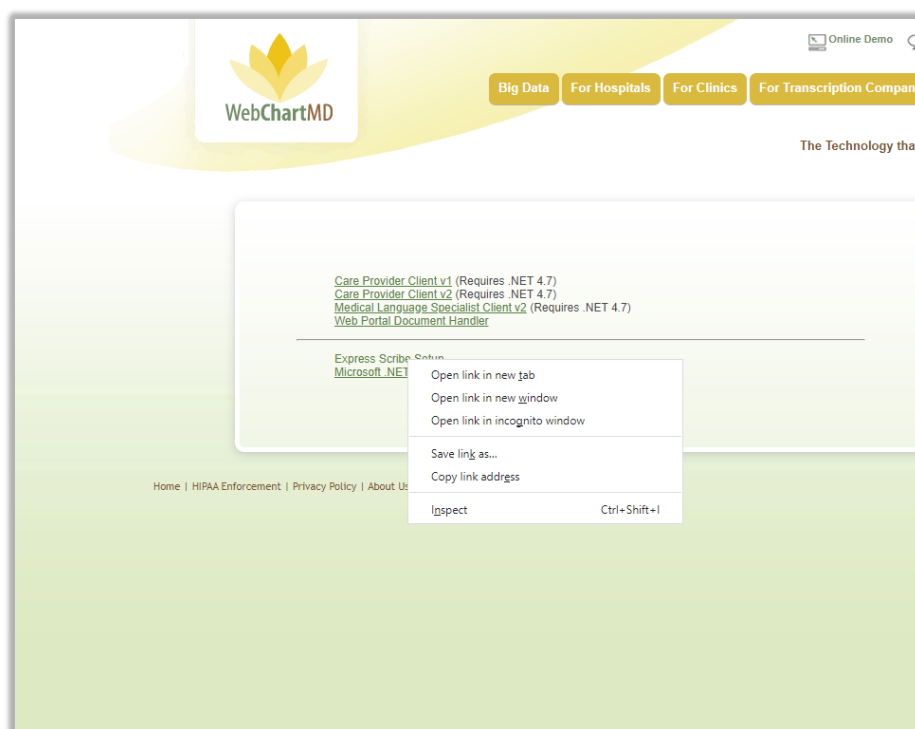


None of these options are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

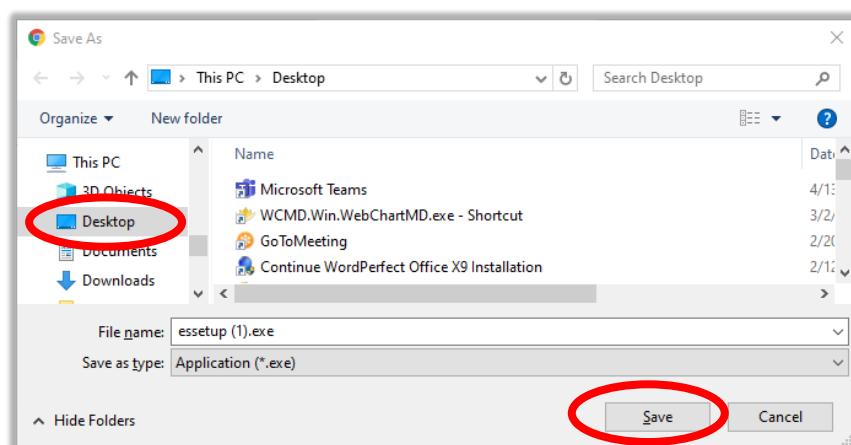
### **For Windows 8/10 only:**

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

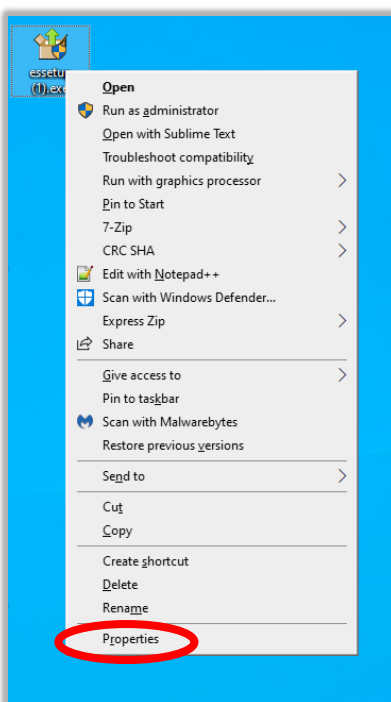
First the user needs to save the download to their desktop. To save the installer on the desktop, the user can right-click the 'Express Scribe Setup' link on the downloads page. Then click 'Save link as'.



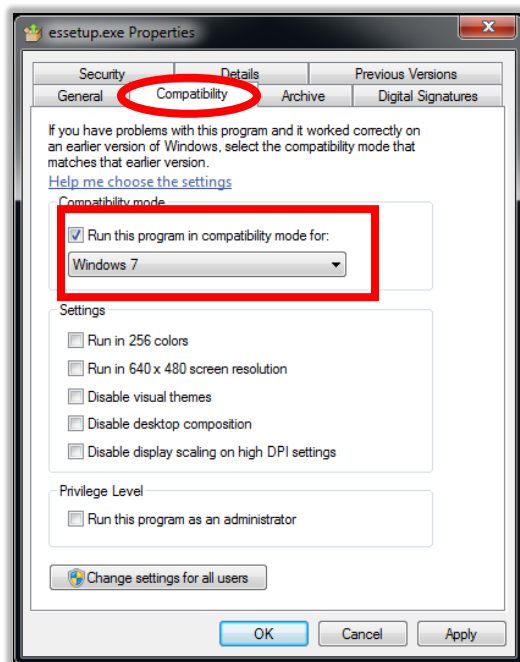
When the user clicks 'Save link as' they will be presented with a 'Save As' window. From here the user will need to save the download to their desktop.



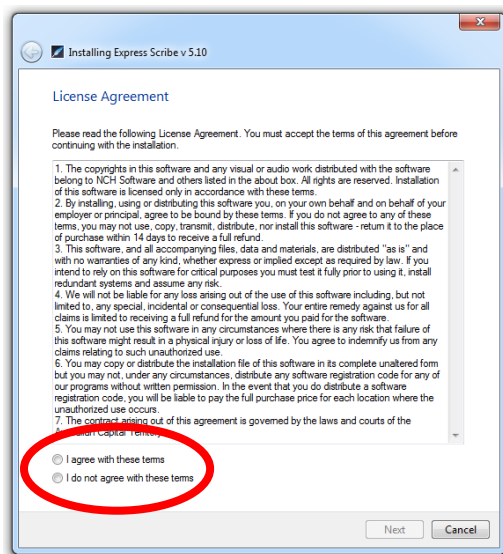
To set the Installation in Compatibility Mode on Windows 8 and 10, user needs to go to the Properties of the downloaded essetup.exe. To do so, right-click the installer and go to 'Properties' at the bottom of the window presented



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

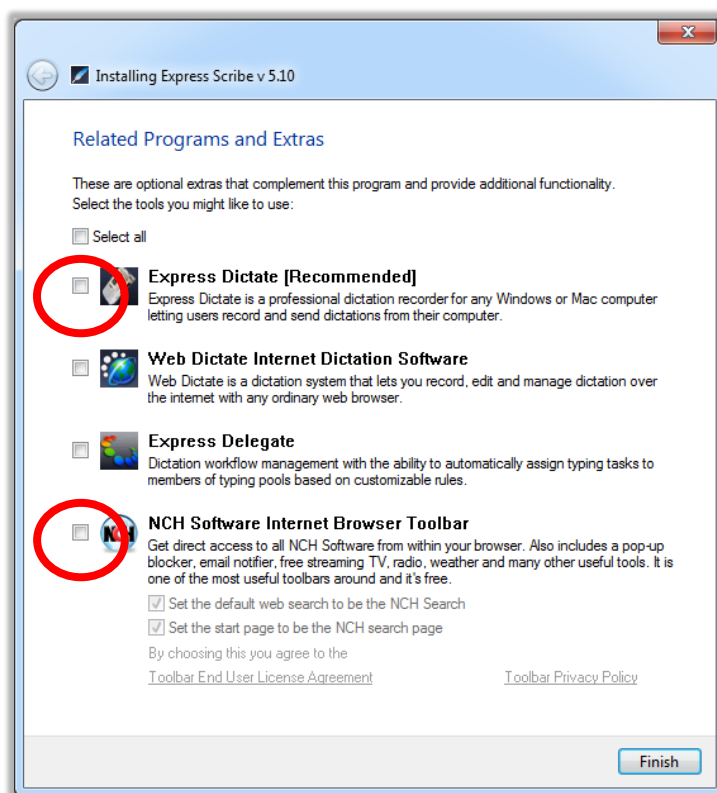


To install Express Scribe, the user double clicks on the essetup.exe installation file. This brings up the License Agreement which can be agreed upon. Click Next.



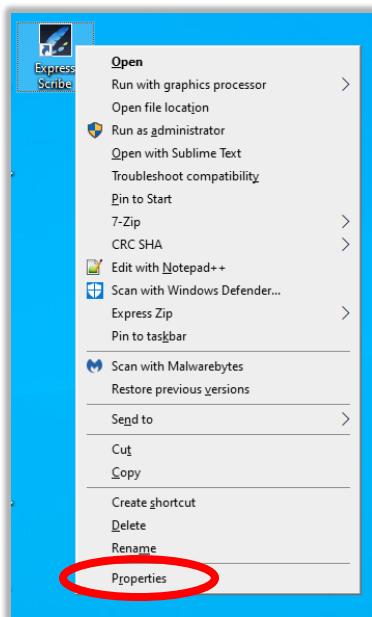


The next page has several extra options that NCH would like the user to try out and bundles them along with Express Scribe. However, none of these are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

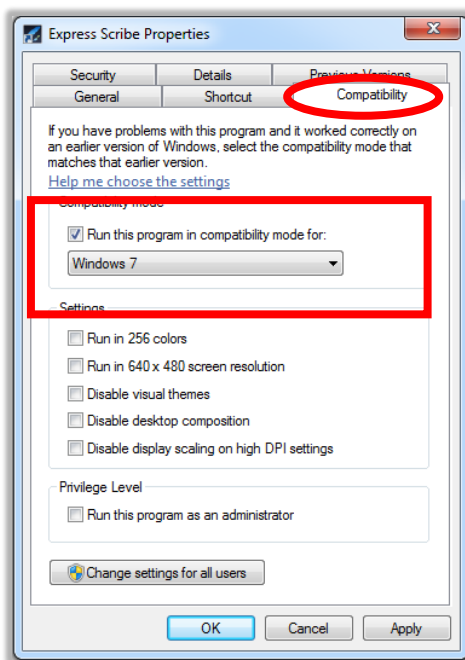


Once 'Finish' has been selected the shortcut for Express Scribe will be on the desktop. On Windows 7 the user can proceed to the next steps and setup their foot pedal (see below). However, on Windows 8 and 10, this may create two NCH Software windows to be presented automatically. Those two windows and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

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



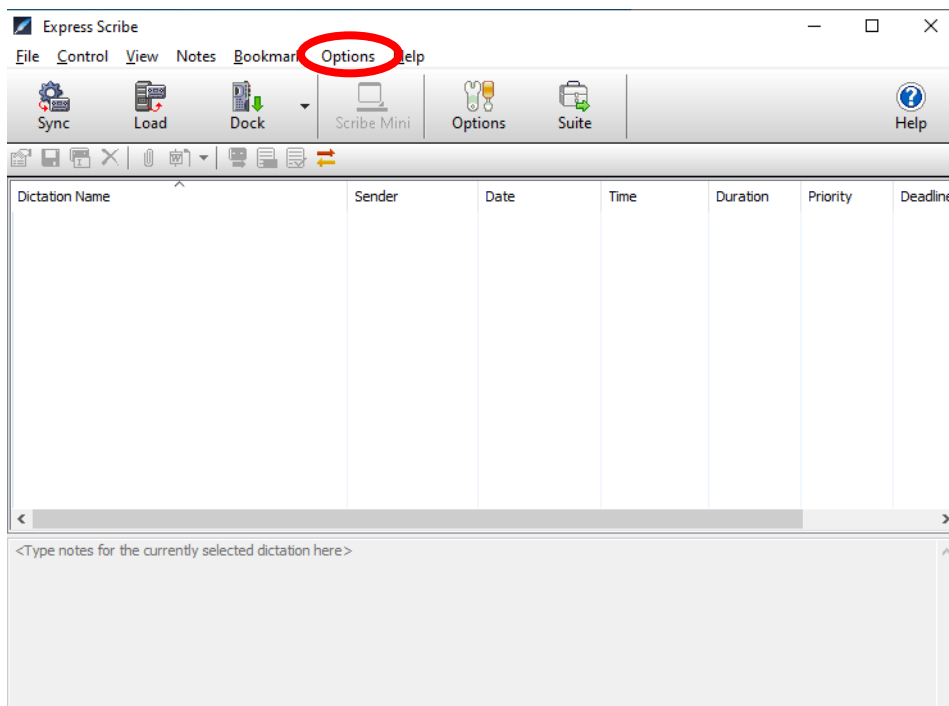
Again, just like before, the user sets the compatibility mode to Windows 7 under the Compatibility tab and clicks OK



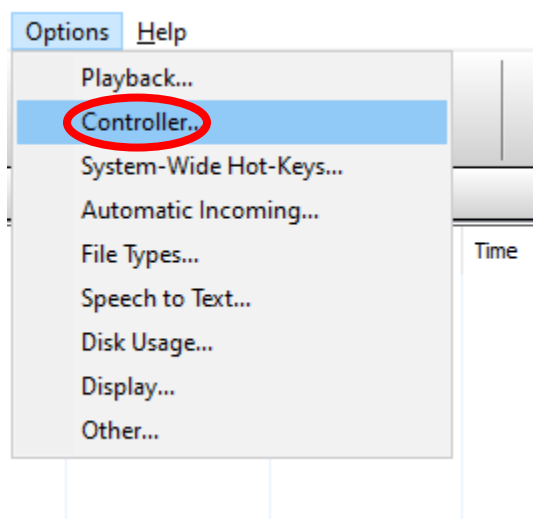
Once compatibility has been set, express scribe is installed and ready to be used.

## Setting Up Food Pedal:

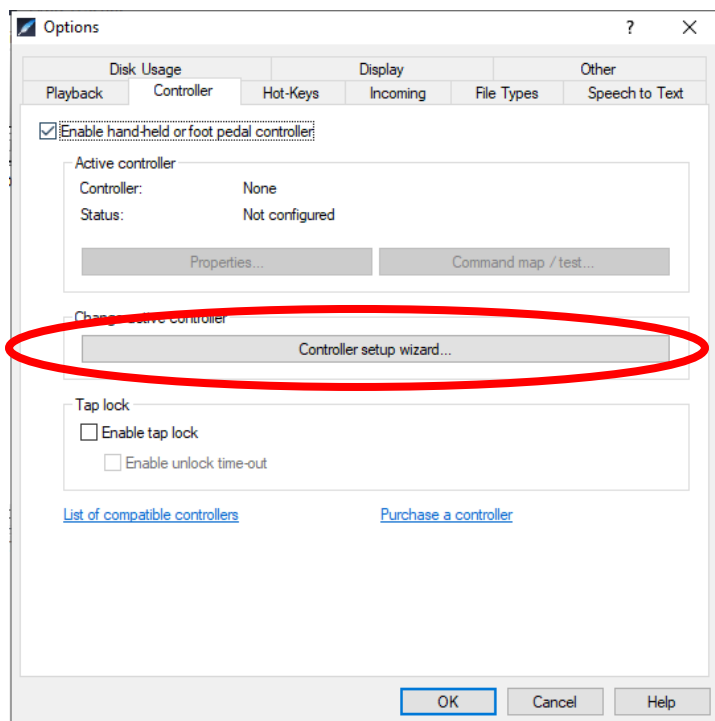
To set up the foot pedal, the user will go into the 'Options' tab in express scribe



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



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



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