



User Manual

Transcriptionist Version

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Prepared by:

WebChartMD
Johnson City, TN 37602



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Welcome to WebChartMD!

WebChartMD launched in 2006 as a workflow platform to assist medical transcription companies and departments process clinical documentation more efficiently. Since then, over 14 million transcriptions for over 40,000 healthcare providers have been transcribed by thousands of medical language specialists.

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

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

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

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

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

**** Please note: for this version of the manual created for transcriptionists, many of the features discussed are permission based and may not display and/or be functional. Features that are permission-based will be noted as such, usually with a statement like, "Fax is a permission-based function." Please contact your administrator for access to any features presented in this manual that are not visible in your online account.**

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”.

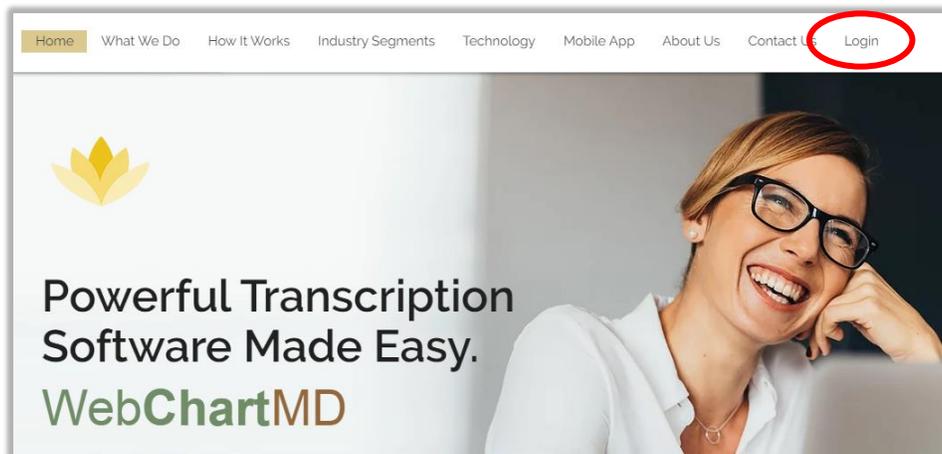
Facility: The healthcare entity serviced by the Transcription Team. For the purpose of this manual, Facility is used synonymously with location, department, and office.

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

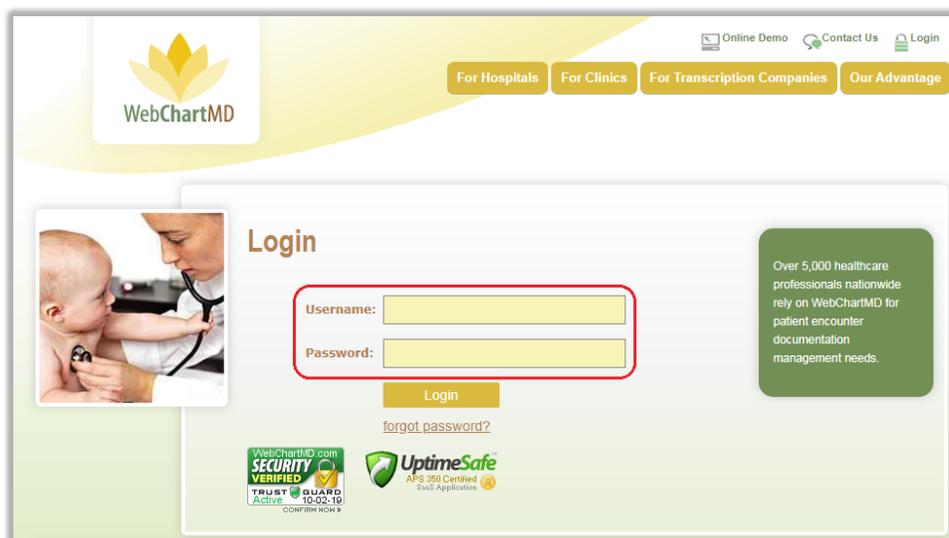
Transcription Team: the group of transcriptionists providing service to the Facility. The Transcription Team could be an outside vendor (Transcription Team), or an in-house transcription department.

Logging into the Portal

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



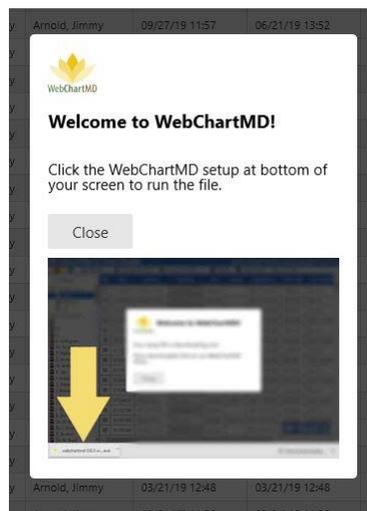
Enter your username and password in the fields and click on the Login button. If the username and password are correct, it will log in to the portal. If incorrect, a message will be displayed indicating that it is incorrect.



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.

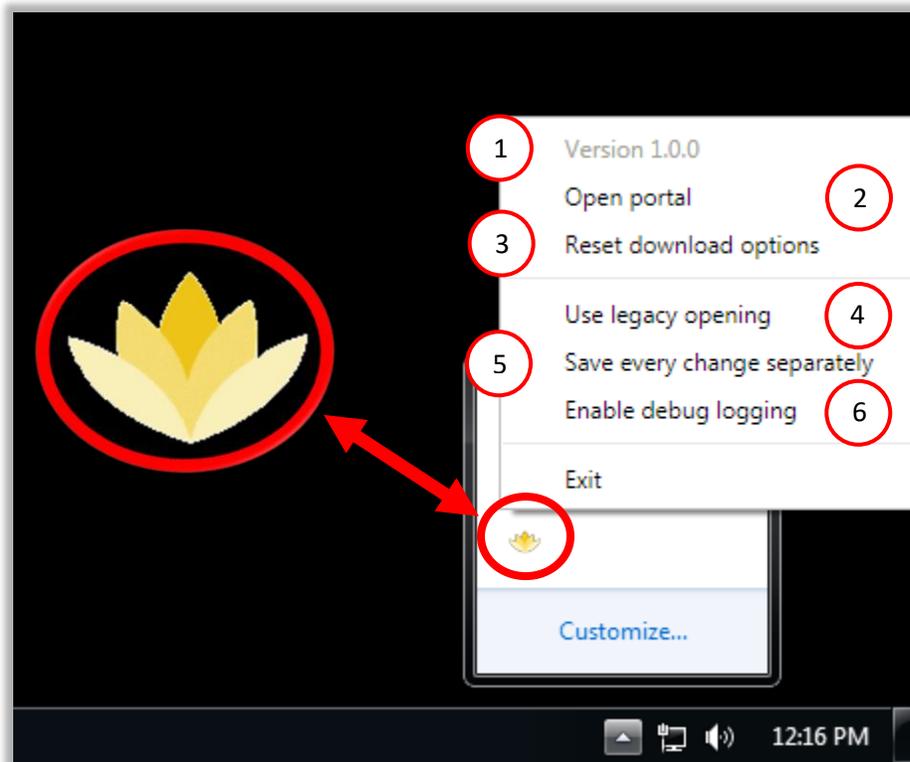


Once the download is complete, click the downloaded file to install it.

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.

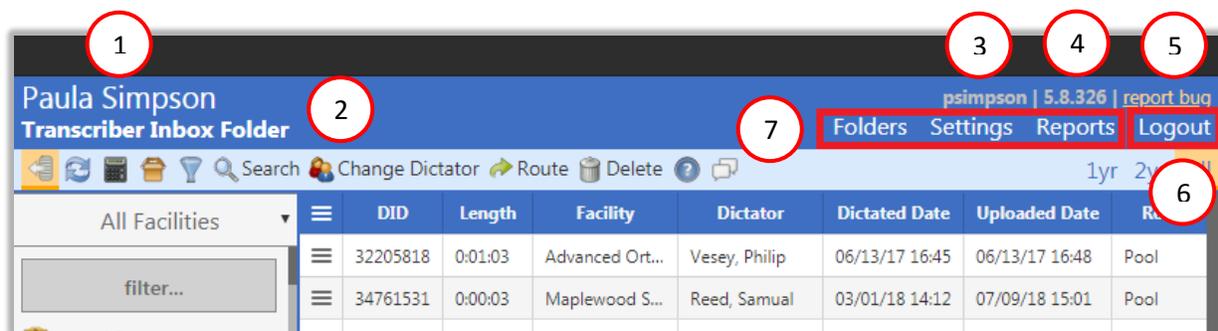


Right mouse-clicking the logo causes the following menu items to appear:

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

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

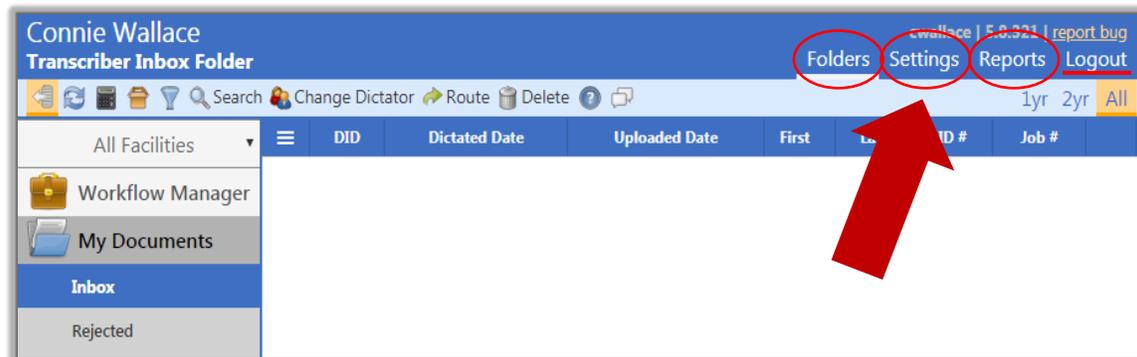
Initial View When Logging In



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

7 System Functional Areas (Views)

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

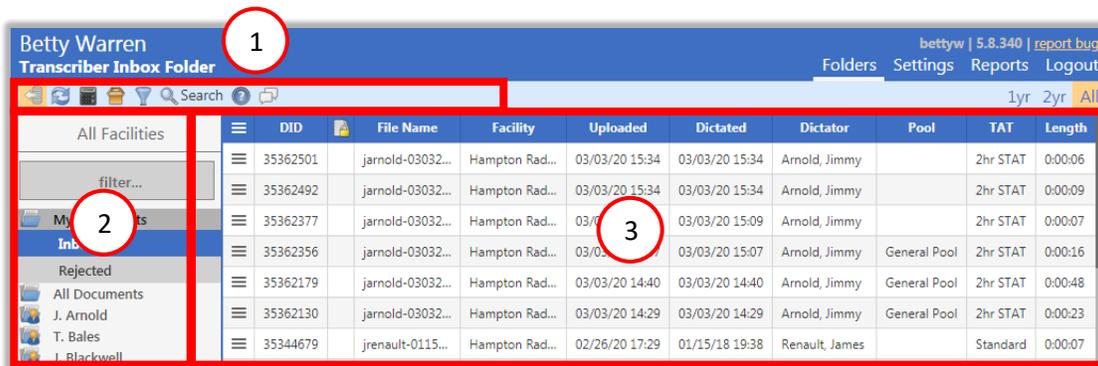


- **The Folders view** displays the folders in which the dictation and transcriptions are accessed. More details can be found on page 14.
- **The Settings view** accesses the various workflow settings used by the Transcription Team and healthcare Facilities. More details can be found on page 66.
- **The Reports view** displays the Reporting suite. More details can be found on page 75.

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:

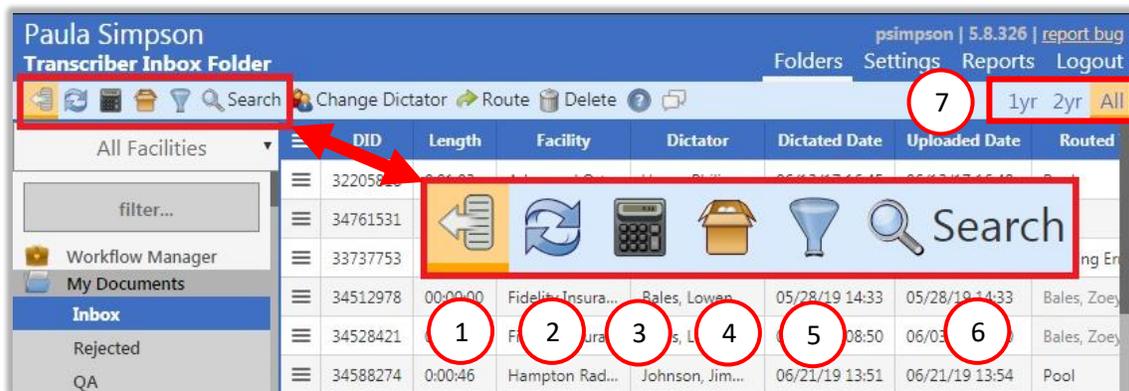


Betty Warren										
Transcriber Inbox Folder										
bettyw 5.8.340 report bug										
Folders Settings Reports Logout										
1yr 2yr All										
All Facilities	DID	File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length	
filter...	35362501	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06	
	35362492	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09	
	35362377	jarnold-03032...	Hampton Rad...	03/03/20 15:09	03/03/20 15:09	Arnold, Jimmy		2hr STAT	0:00:07	
	35362356	jarnold-03032...	Hampton Rad...	03/03/20 15:07	03/03/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16	
	35362179	jarnold-03032...	Hampton Rad...	03/03/20 14:40	03/03/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48	
	35362130	jarnold-03032...	Hampton Rad...	03/03/20 14:29	03/03/20 14:29	Arnold, Jimmy	General Pool	2hr STAT	0:00:23	
	35344679	jrenault-0115...	Hampton Rad...	02/26/20 17:29	01/15/18 19:38	Renault, James		Standard	0:00:07	

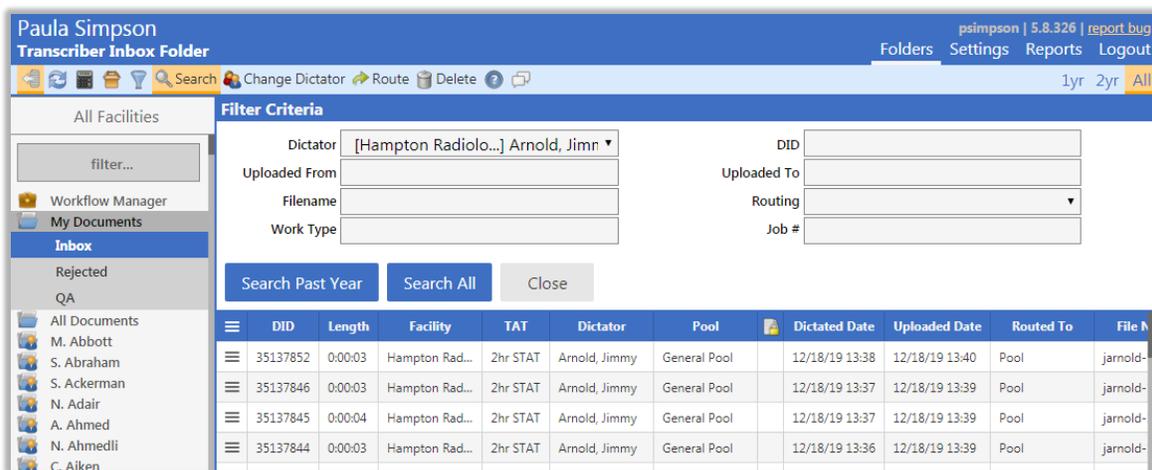
- 1 **Workflow Management Toolbar:** Along the top edge of the Folders view is the Functions Ribbon, or toolbar, which contains buttons used to perform various workflow related tasks.
- 2 **Folder Pane:** Displays all folders used in the workflow.
- 3 **File Display:** Displays all dictations and transcriptions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



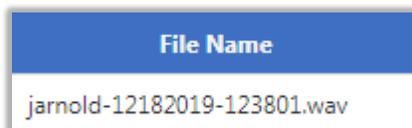
- 1 **Pin Sidebar** – This toggle button shows or hides the folder pane containing folders below the All Facilities column.
- 2 **Refresh** – Refreshes the data on the page. This can be used to refresh the view after moving columns, changing flags or after closing a document to update the data displayed.
- 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** – 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: 18th December 2019
 “123801” – time of dictation in 24hr format: 12:38pm
 “wav” – audio file format of .wav

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

- The “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.

- 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.

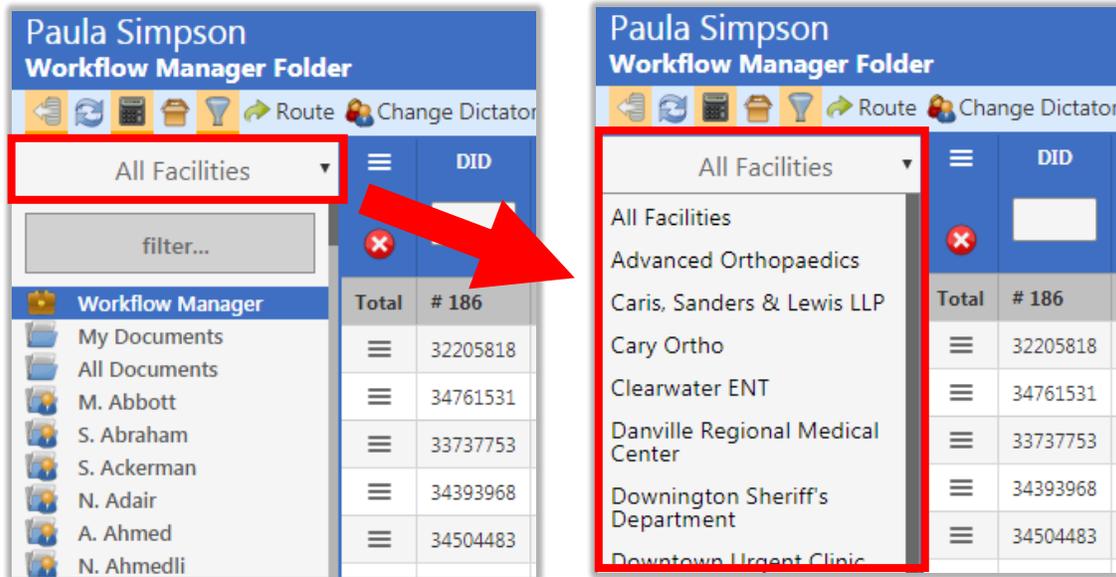
Several other folder management functions appear on the Workflow Management Toolbar, depending on which folder the user is in. Details of these functions are provided in the individual folders.

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 that the transcriptionist has permission to access. Selecting on individual Facility displays only those Dictators at the selected Facility.



The Folder Pane also lists all folders that the user has permission to access, such as the Workflow Manager and folders for specific accounts and Dictators. Details related to each folder view are described in upcoming sections of the manual.

** Please Note: For more information and access to permission-based folders and features, please contact your Administrator.

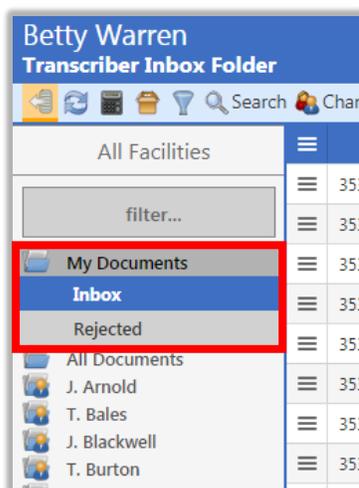
Folders

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

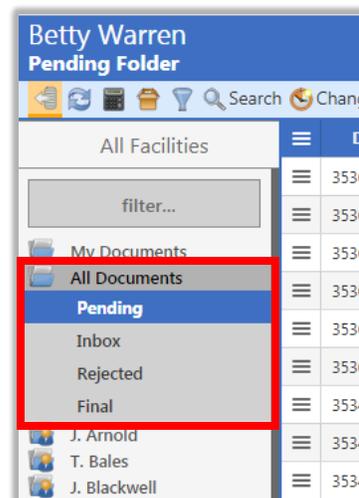
My Documents: The “My Documents” shows the dictations and transcriptions to the Transcription Team admin from the Transcription Teams’ point of view. More information on My Documents can be found on page 23.

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 39.

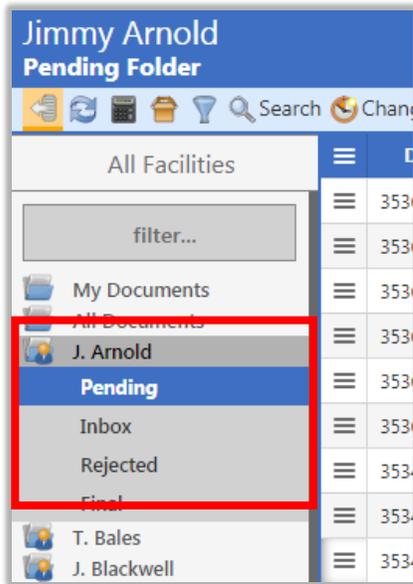
Dictator Folders: Below the “All Documents” and its folders are the Dictator Folders. Access to specific Dictator folders is permission-based. These are laid out alphabetically by the last name of the provider. More information on Dictator Folders can be found on page 59.



The Inbox folder within “My Documents” is selected.



The Pending folder within “All Documents” is selected.



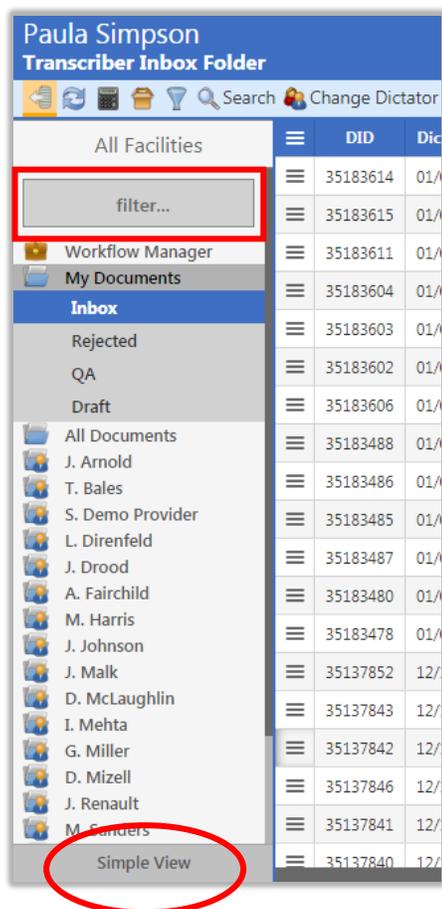
The Pending folder within the “Dictator Folders” for Dictator J. Arnold is selected.

Folder View Options

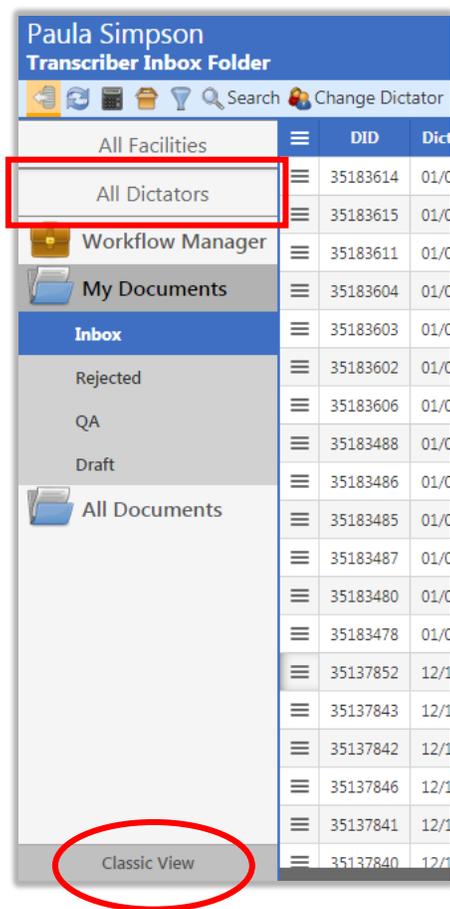
The Folder Pane can present folders in two different views. At the bottom of the Folders Pane a toggle button changes the which switches the view between “Classic View” and “Simple View”.

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.



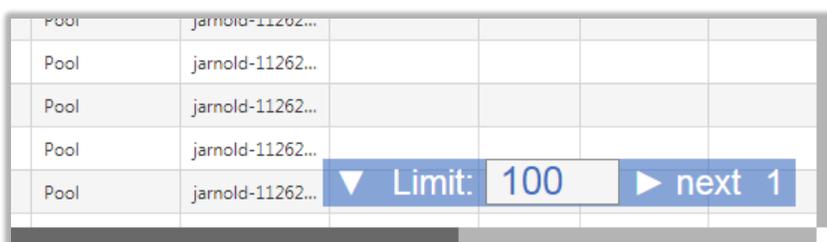
Currently in Simple View. Click the “Classic View” button to move to Classic View.

File Display

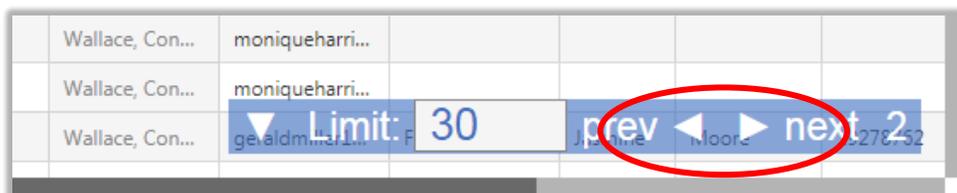
To the right of the Folder Pane is the space for File Display. This display contains a series of rows, each of which represents a dictation, or audio file (if in the Pending folder) or a document if in any other folder. The folders visible and their content depend on the User role and their permissions.

Row and Page Setting

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



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



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



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

My Documents

The 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.

**** Please Note:** Workflow Manager is a permission-based feature and may not be accessible to all Transcription Staff. For instructions on the use of the Workflow Manager, please speak to your Administrator for more details.

There are two folders with the My Documents view:



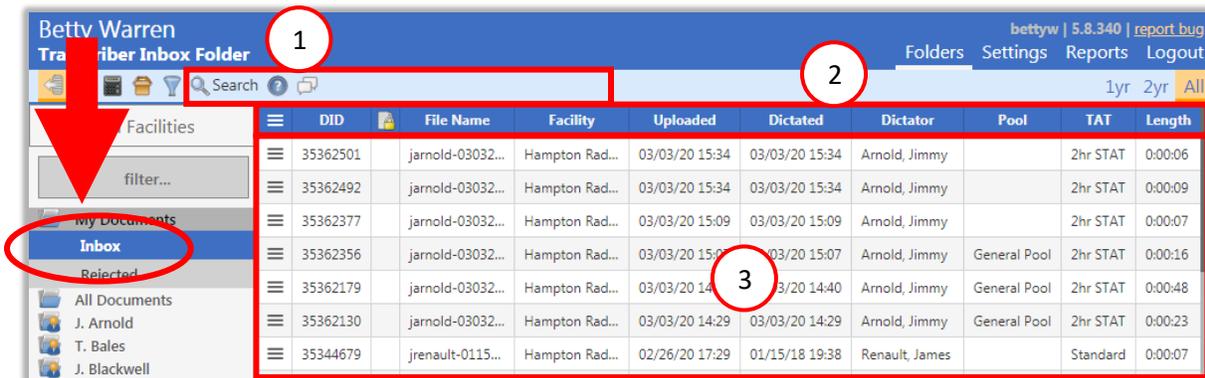
Betty Warren									
Transcriber Inbox Folder									
bettyw 5.8.340 report bug									
Folders Settings Reports Logout									
1yr 2yr All									
filter...	DID	File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length
All Facilities	35362501	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06
	35362492	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09
My Documents	35362377	jarnold-03032...	Hampton Rad...	03/03/20 15:09	03/03/20 15:09	Arnold, Jimmy		2hr STAT	0:00:07
Inbox	35362356	jarnold-03032...	Hampton Rad...	03/03/20 15:07	03/03/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16
Rejected	35362179	jarnold-03032...	Hampton Rad...	03/03/20 14:40	03/03/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48
All Documents	35362130	jarnold-03032...	Hampton Rad...	03/03/20 14:29	03/03/20 14:29	Arnold, Jimmy	General Pool	2hr STAT	0:00:23
J. Arnold	35344679	jrenault-0115...	Hampton Rad...	02/26/20 17:29	01/15/18 19:38	Renault, James		Standard	0:00:07
T. Bales									
J. Blackwell									

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

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

Inbox

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

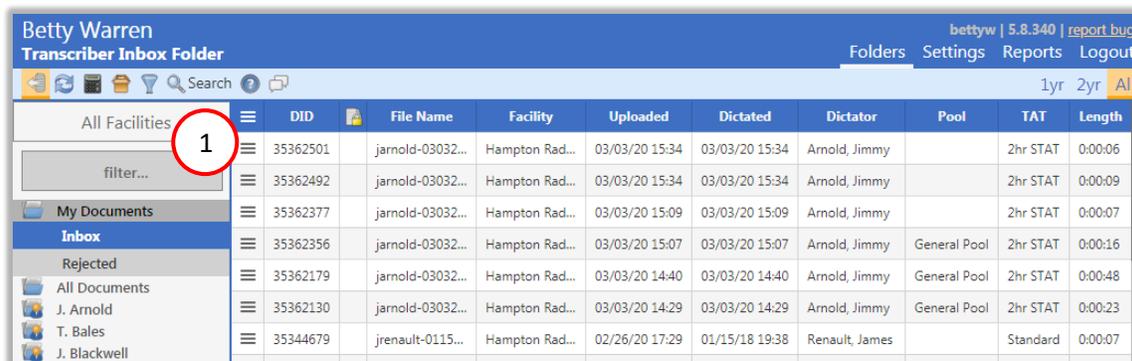


DID	File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length
35362501	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06
35362492	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09
35362377	jarnold-03032...	Hampton Rad...	03/03/20 15:09	03/03/20 15:09	Arnold, Jimmy		2hr STAT	0:00:07
35362356	jarnold-03032...	Hampton Rad...	03/03/20 15:07	03/03/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16
35362179	jarnold-03032...	Hampton Rad...	03/03/20 14:40	03/03/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48
35362130	jarnold-03032...	Hampton Rad...	03/03/20 14:29	03/03/20 14:29	Arnold, Jimmy	General Pool	2hr STAT	0:00:23
35344679	jrenault-0115...	Hampton Rad...	02/26/20 17:29	01/15/18 19:38	Renault, James		Standard	0:00:07

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. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.
- 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



Betty Warren									
Transcriber Inbox Folder									
Folders Settings Reports Logout									
1yr 2yr All									
File Name	DID	File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length
	35362501	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06
	35362492	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09
	35362377	jarnold-03032...	Hampton Rad...	03/03/20 15:09	03/03/20 15:09	Arnold, Jimmy		2hr STAT	0:00:07
	35362356	jarnold-03032...	Hampton Rad...	03/03/20 15:07	03/03/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16
	35362179	jarnold-03032...	Hampton Rad...	03/03/20 14:40	03/03/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48
	35362130	jarnold-03032...	Hampton Rad...	03/03/20 14:29	03/03/20 14:29	Arnold, Jimmy	General Pool	2hr STAT	0:00:23
	35344679	jrenault-0115...	Hampton Rad...	02/26/20 17:29	01/15/18 19:38	Renault, James		Standard	0:00:07

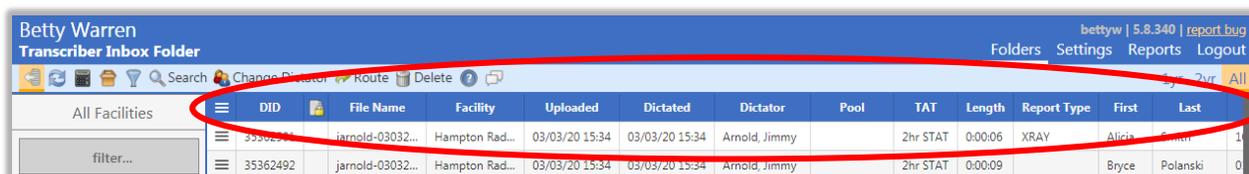
The first five icons from the left are consistent in all folders and more information on them can be found on page 14. The next four icons are explained in detail below:

Functions unique to the My Documents Inbox are:

- 1 Search A detailed description of Search is found on page 14.

Columns

Columns and their meaning are given below:



Betty Warren									
Transcriber Inbox Folder									
Folders Settings Reports Logout									
1yr 2yr All									
File Name	DID	File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length
	35362501	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06
	35362492	jarnold-03032...	Hampton Rad...	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09

Here are the column descriptions in details:

Actions: This column contains three icons:

Betty Warren
Transcriber Inbox Folder

🔊 🔄 📄 🗑️ 🔍 Search ? 🗨️

All Facilities	☰	DID	📄	File Name	Facility	Uploaded	
filter...	☰	35362501	📄	jarnold-03032...	Hampto	03/03/20 15:34	🔊
	☰	35362492	📄	jarnold-03032...	Hampton Rad...	03/03/20 15:34	🔊
My Documents	☰	35362377	📄	jarnold-03032...	Hamp	03/03/20 15:09	🔊
Inbox	☰	35362356	📄	jarnold-03032...	Hamp	03/03/20 15:07	🔊
Rejected	☰	35362179	📄	jarnold-03032...	Hampton Rad...	03/03/20 14:40	🔊
All Documents	☰	35362130	📄	jarnold-03032...	Hampton Rad...	03/03/20 14:29	🔊
J. Arnold	☰	35344679	📄	jrenault-0115...	Hampton Rad...	02/26/20 17:29	🔊
T. Bales	☰	35344678	📄	jrenault-1008...	Hampton Rad...	02/26/20 17:29	🔊
J. Blackwell							
T. Burton							

- 1 Play Audio – Clicking on the “Play Audio” icon downloads the audio file to the computer and plays it to the computer’ default audio player.

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.

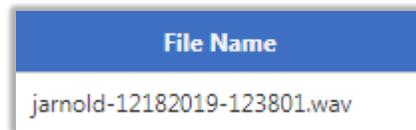
eSigned: This column displays if the transcription has been electronically signed by the Dictator.

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 the Pending folder. Components of the filename are:



"jarnold" – dictator' username

"12182019" – date of dictation: 18th December 2019

"123801" – time of dictation in 24hr format: 12:38pm

"wav" – audio file format of .wav. WebChartMD supports .dss, .mp3, .wav, .wma audio file formats.

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.

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

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

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. Templates such as “OP Report” or “Letter” or H&P Eval” are common examples.

Routed To: This column displays the name of the transcriptionist or editor currently assigned a dictation or transcription. See page 63 for a full description of Routing.

TAT: this column displays the turn-around time assigned to a dictation. See page 42 for a full description of dictation Priority & TAT setup.

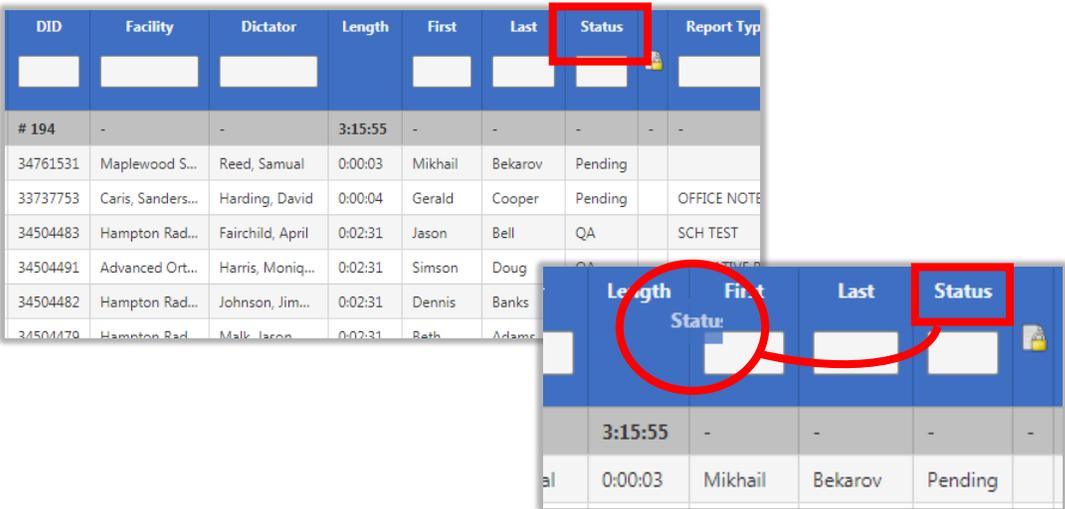
Upload Date and Time: this column displays the date and time when dictations upload into the database.

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.

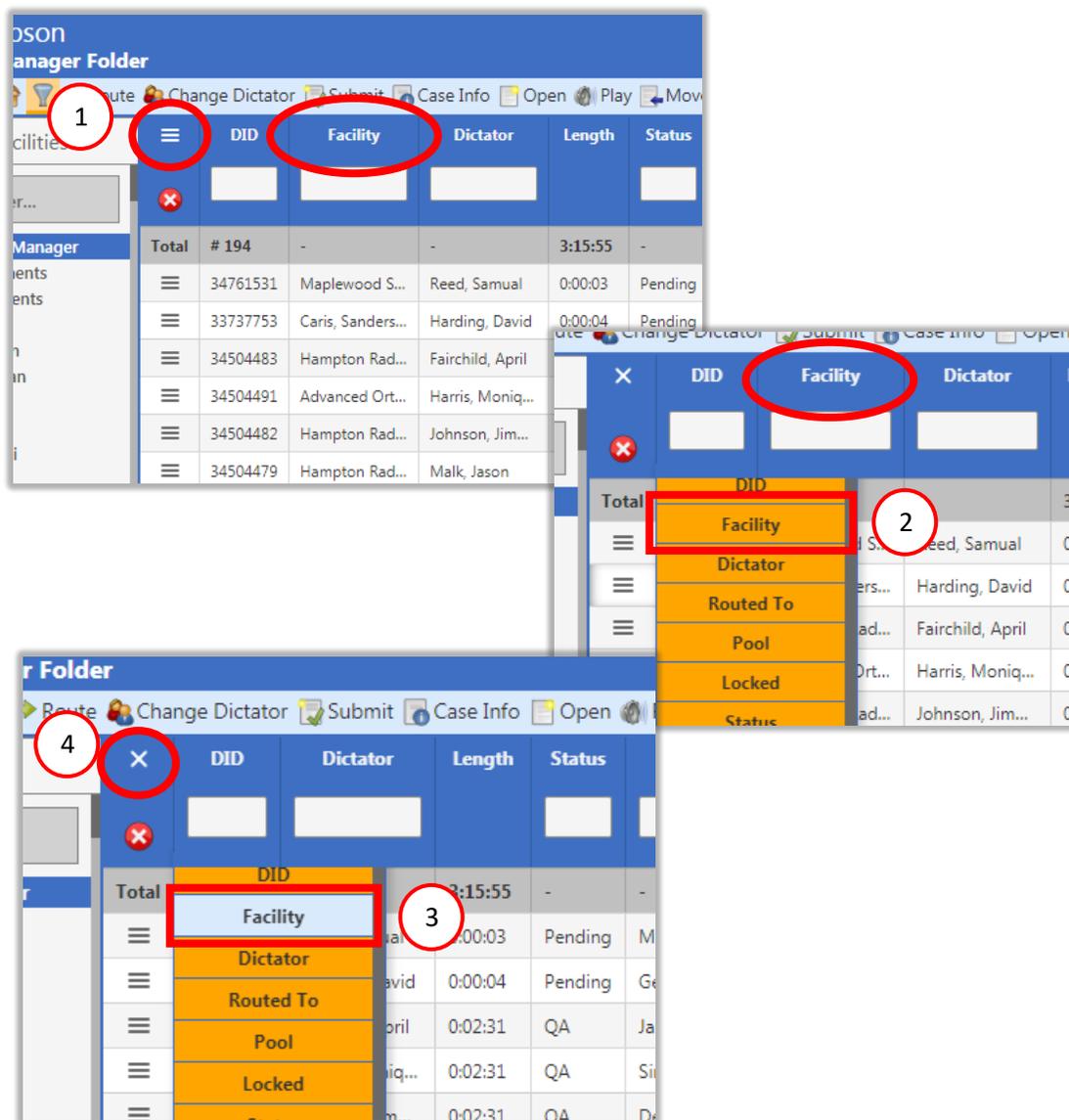


DID	Facility	Dictator	Length	First	Last	Status	Report Type
# 194	-	-	3:15:55	-	-	-	-
34761531	Maplewood S...	Reed, Samuel	0:00:03	Mikhail	Bekarov	Pending	
33737753	Caris, Sanders...	Harding, David	0:00:04	Gerald	Cooper	Pending	OFFICE NOTE
34504483	Hampton Rad...	Fairchild, April	0:02:31	Jason	Bell	QA	SCH TEST
34504491	Advanced Ort...	Harris, Moniq...	0:02:31	Simson	Doug	QA	OPERATIVE R
34504482	Hampton Rad...	Johnson, Jim...	0:02:31	Dennis	Banks	QA	XRAY
34504479	Hampton Rad...	Malk, Jason	0:02:31	Beth	Adams	QA	

☰	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).



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:

Betty Warren | Transcriber Inbox Folder | Betty Warren | 5.8.340 | Folders Settings Reports

Search Change Dictator Route Delete 1yr

All Facilities		DID	Dictator	Length	Status	First	Last	TAT	Report Type	Last Modified
filter...		34761531	Reed, Samuel	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		
My Documents		33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Paula
Inbox		34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard		Bales, Zoey
Rejected		34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
QA		34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard	CT SCAN	Simpson, Paula
All Documents		34504491	Harris, Moniq...	0:02:31	QA	Simson	Doug	1hr STAT	OPERATIVE R...	Bales, Zoey
J. Arnold		34504482	Johnson, Jim...	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
T. Bales		34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Paula
J. Blackwell		34504604	Harris, Moniq...	0:02:21	QA	Nancy	Comstock	Standard	DISCHARGE S...	Bales, Zoey
T. Burton										
A. Fairchild										

The TAT column header in ascending sort:

Betty Warren | Transcriber Inbox Folder | Betty Warren | 5.8.340 | Folders Settings Reports

Search Change Dictator Route Delete 1yr

All Facilities		DID	Dictator	Length	Status	First	Last	TAT	Report Type	Last Modified
filter...		34504491	Harris, Moniq...	0:02:31	QA	Simson	Doug	1hr STAT	OPERATIVE R...	Bales, Zoey
My Documents		35003347	Arnold, Jimmy	0:00:12	Pending	Jeremy	Hobson	1hr STAT		
Inbox		35022561	Bales, Lowen	0:00:02	QA	Allison	Smith	1hr STAT	A	Bales, Zoey
Rejected		34761531	Reed, Samuel	0:00:03	Pending	Mikhail	Bekarov	2hr STAT		
QA		33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT	OFFICE NOTE	Simpson, Pa
All Documents		34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT	SCH TEST	Bales, Zoey
J. Arnold		35068144	Miller, Gerald	0:00:12	Pending			2hr STAT		
T. Bales		34504482	Johnson, Jim...	0:02:31	QA	Dennis	Banks	8hr STAT	XRAY	Bales, Zoey
J. Blackwell		34504524	Harris, Moniq...	0:01:08	QA	Victor	Agheboir	12hr STAT	CONSULT	Simpson, Pa
T. Burton										
A. Fairchild										

The TAT column header in descending sort:

Betty Warren | 5.8.34
 Transcriber Inbox Folder | Folders Settings Repo

Search Change Dictator Route Delete

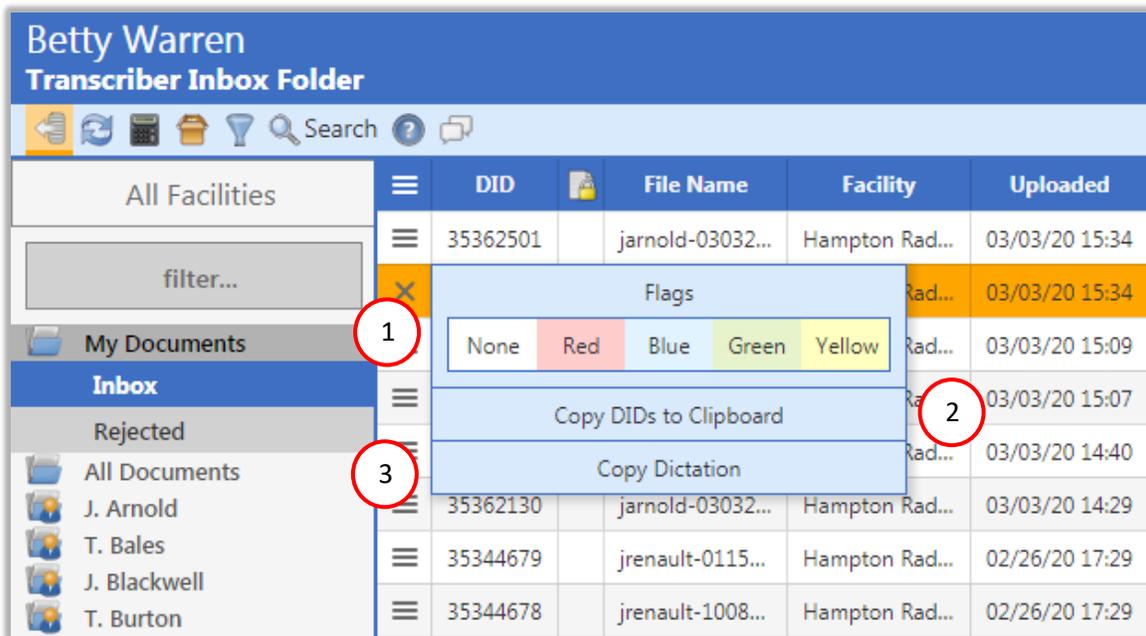
All Facilities	DID	Dictator	Length	Status	First	Last	TAT	Report Type	Last Mod
filter...	35081472	Bales, Lowen	0:00:08	Pending		Bekarov	Standard		,
	35072519	Bales, Lowen	0:00:36	QA	Ralph	Cooper	Standard	A	Bales, Zoey
My Documents	34504524	Harris, Moniq...	0:01:08	QA	Victor	BLANK	12hr STAT	CONSULT	Simpson, Pe
Inbox	34504482	Johnson, Jim...	0:02:31	QA	Dennis	Bell	8hr STAT	XRAY	Bales, Zoey
Rejected	35068144	Miller, Gerald	0:00:12	Pending		Adams	2hr STAT		,
QA	34504483	Fairchild, April	0:02:31	QA	Jason	Doug	2hr STAT	SCH TEST	Bales, Zoey
All Documents	33737753	Harding, David	0:00:04	Pending	Gerald	Banks	2hr STAT	OFFICE NOTE	Simpson, Pe
J. Arnold	34761531	Reed, Samuel	0:00:03	Pending	Mikhail	Agheboir	2hr STAT		,
T. Bales	35147151	Bales, Traci	00:00:00	QA	Allison	Comstock	1hr STAT	Blank Template	Bales, Zoey
J. Blackwell									
T. Burton									
A. Fairchild									

File Display

The Inbox File Display area can display files in the Pending phase of the workflow. For a detailed description of available file statuses and their meaning, see page 60. For a detailed description of Row and Page Settings, see page 21.

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.

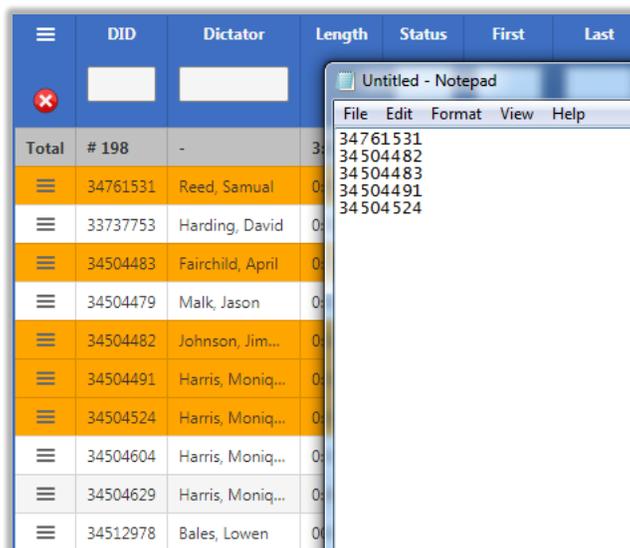


All Facilities	DID	File Name	Facility	Uploaded
	35362501	jarnold-03032...	Hampton Rad...	03/03/20 15:34
filter...				
My Documents				
Inbox				
Rejected				
All Documents				
J. Arnold	35362130	jarnold-03032...	Hampton Rad...	03/03/20 14:29
T. Bales	35344679	jrenault-0115...	Hampton Rad...	02/26/20 17:29
J. Blackwell	35344678	jrenault-1008...	Hampton Rad...	02/26/20 17:29
T. Burton				

- 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:

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

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



- 3 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.

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.



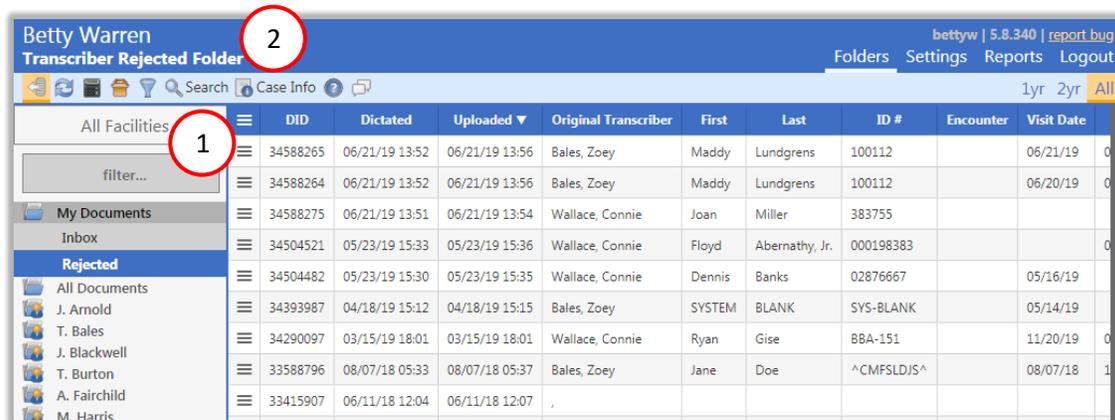
DID	Dictated Date	Uploaded Date	Original Transcriber	Counter	DOV	DOB	Facility
34588265	06/21/19 13:52	06/21/19 13:56	Bales, Zoey		06/21/19	04/04/85	Hampton Rad...
34588264	06/21/19 13:52	06/21/19 13:56	Bales, Zoey		06/20/19	04/04/85	Hampton Rad...
34588275	06/21/19 13:51	06/21/19 13:54	Wallace, Connie				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. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.
- 2 **Columns:** Rejected folder has several important columns available for the user.
- 3 **File Display:** The central section of the Portal displays the rejected transcriptions.

Folder Management Functions

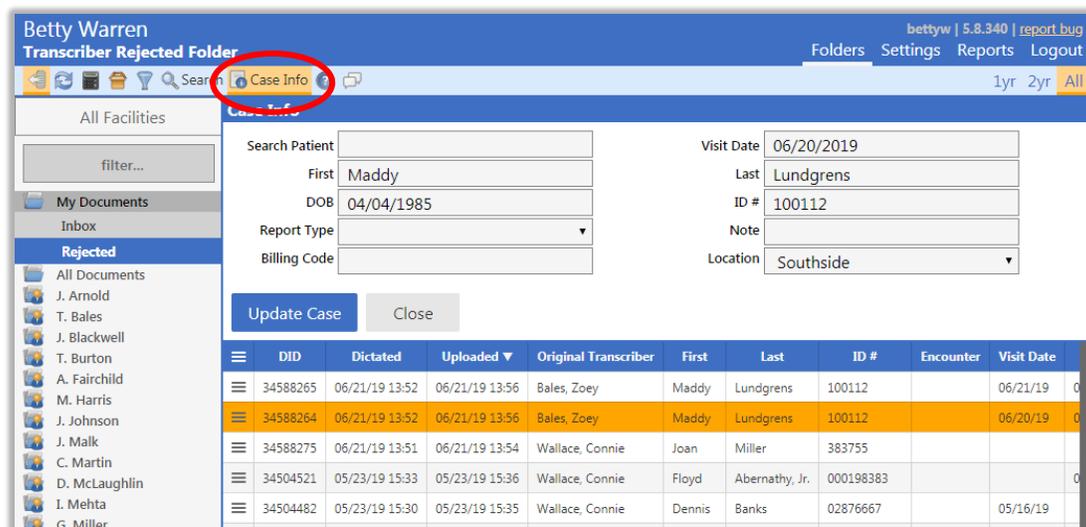
The first five icons from the left are consistent in all folders and more information on them can be found on page 14. The next five icons are explained in detail below:



All Facilities	DID	Dictated	Uploaded	Original Transcriber	First	Last	ID #	Encounter	Visit Date
filter...	34588265	06/21/19 13:52	06/21/19 13:56	Bales, Zoey	Maddy	Lundgrens	100112		06/21/19 0
	34588264	06/21/19 13:52	06/21/19 13:56	Bales, Zoey	Maddy	Lundgrens	100112		06/20/19 0
My Documents	34588275	06/21/19 13:51	06/21/19 13:54	Wallace, Connie	Joan	Miller	383755		
Inbox	34504521	05/23/19 15:33	05/23/19 15:36	Wallace, Connie	Floyd	Abernathy, Jr.	000198383		0
Rejected	34504482	05/23/19 15:30	05/23/19 15:35	Wallace, Connie	Dennis	Banks	02876667		05/16/19
All Documents	34393987	04/18/19 15:12	04/18/19 15:15	Bales, Zoey	SYSTEM	BLANK	SYS-BLANK		05/14/19
J. Arnold	34290097	03/15/19 18:01	03/15/19 18:01	Wallace, Connie	Ryan	Gise	BBA-151		11/20/19 0
T. Bales	33588796	08/07/18 05:33	08/07/18 05:37	Bales, Zoey	Jane	Doe	^CMFSLDIS^		08/07/18 1
J. Blackwell	33415907	06/11/18 12:04	06/11/18 12:07						
T. Burton									
A. Fairchild									
M. Harris									

1 Search: A detailed description of Search is found on page 14.

2 Case Info



DID	Dictated	Uploaded	Original Transcriber	First	Last	ID #	Encounter	Visit Date
34588265	06/21/19 13:52	06/21/19 13:56	Bales, Zoey	Maddy	Lundgrens	100112		06/21/19 0
34588264	06/21/19 13:52	06/21/19 13:56	Bales, Zoey	Maddy	Lundgrens	100112		06/20/19 0
34588275	06/21/19 13:51	06/21/19 13:54	Wallace, Connie	Joan	Miller	383755		
34504521	05/23/19 15:33	05/23/19 15:36	Wallace, Connie	Floyd	Abernathy, Jr.	000198383		0
34504482	05/23/19 15:30	05/23/19 15:35	Wallace, Connie	Dennis	Banks	02876667		05/16/19

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.

Columns

All available columns viewable in the My Documents Rejected and their descriptions can be found starting on page 24.

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 28 for a full description of column management features.

File Display

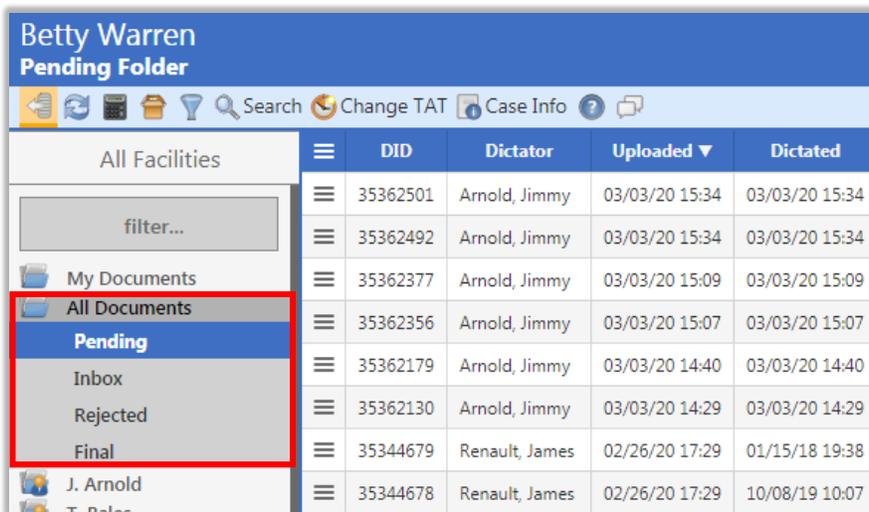
This section displays transcriptions that have been rejected by the Dictator. All visible transcriptions in this folder are of the Rejected status. For a detailed description of available file statuses and their meaning, see page 60. For a detailed description of Row and Page Settings, see page 21.

File Action Menu

All available “File Action Menu” options viewable in the My Documents Rejected and their descriptions can be found starting on page 32.

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.



Betty Warren Pending Folder				
All Facilities				
	DID	Dictator	Uploaded ▼	Dictated
filter...	35362501	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34
	35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34
My Documents	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09
All Documents	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07
Pending	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40
Inbox	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29
Rejected	35344679	Renault, James	02/26/20 17:29	01/15/18 19:38
Final	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07

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.

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.



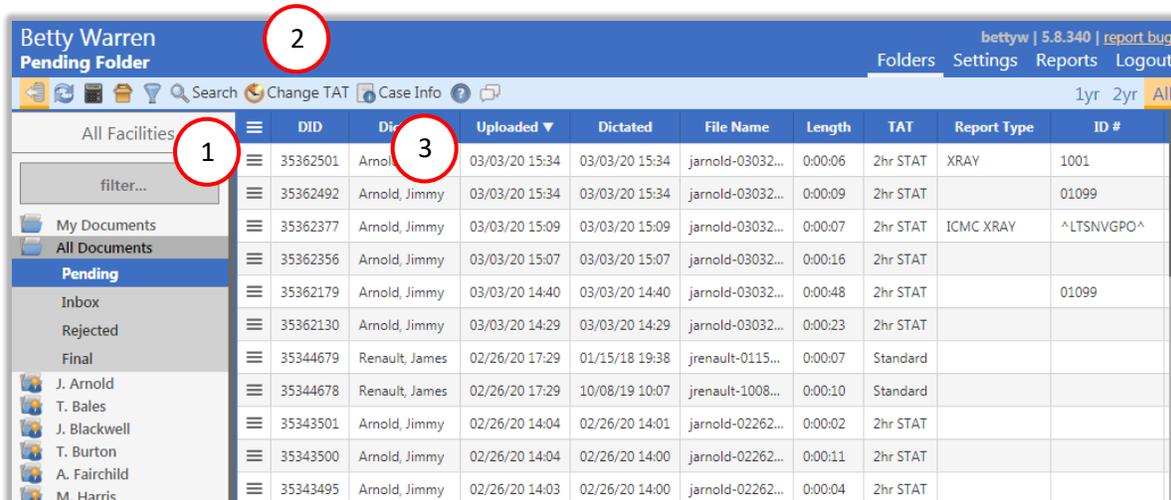
The screenshot shows the 'Pending Folder' view for user Betty Warren. The interface includes a left sidebar with folders like 'All Facilities', 'My Documents', 'All Documents', 'Pending', 'Inbox', 'Rejected', and 'Final'. The main area displays a table of files with columns: DID, Dictator, Uploaded, Dictated, File Name, Length, TAT, Report Type, and ID #. A red arrow points to the 'Pending' folder in the sidebar. A red box highlights the top ribbon area (1), the table columns (2), and the table rows (3).

DID	Dictator	Uploaded	Dictated	File Name	Length	TAT	Report Type	ID #
35362501	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032...	0:00:06	2hr STAT	XRAY	1001
35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032...	0:00:09	2hr STAT		01099
35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09	jarnold-03032...	0:00:07	2hr STAT	ICMC XRAY	^LTSNVGPO^
35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarnold-03032...	0:00:16	2hr STAT		
35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032...	0:00:48	2hr STAT		01099
35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29	jarnold-03032...	0:00:23	2hr STAT		
35344679	Renault, James	02/26/20 17:29	01/15/18 19:3	jrenault-0115...	0:00:07	Standard		
35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jrenault-1008...	0:00:10	Standard		
35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarnold-02262...	0:00:02	2hr STAT		
35343500	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:00	jarnold-02262...	0:00:11	2hr STAT		

The Pending folder consists of three important areas:

- 1 **Folder Management Functions:** This ribbon holds several function buttons that assist with file management. Only a specific set of functions are available in the Pending folder. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.
- 2 **Columns:** Pending folder has several important columns available for the user.
- 3 **Files:** The central section of the Portal displays the files.

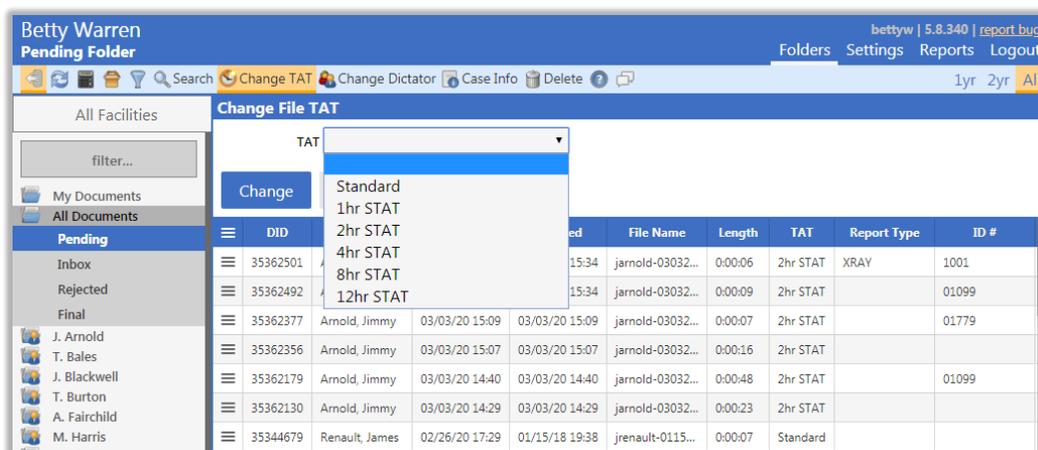
Folder Management Functions



	DID	Dictator	Uploaded	Dictated	File Name	Length	TAT	Report Type	ID #
	35362501	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032...	0:00:06	2hr STAT	XRAY	1001
	35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032...	0:00:09	2hr STAT		01099
	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09	jarnold-03032...	0:00:07	2hr STAT	ICMC XRAY	^LTSNVGPO^
	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarnold-03032...	0:00:16	2hr STAT		
	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032...	0:00:48	2hr STAT		01099
	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29	jarnold-03032...	0:00:23	2hr STAT		
	35344679	Renault, James	02/26/20 17:29	01/15/18 19:38	jrenault-0115...	0:00:07	Standard		
	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jrenault-1008...	0:00:10	Standard		
	35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarnold-02262...	0:00:02	2hr STAT		
	35343500	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:00	jarnold-02262...	0:00:11	2hr STAT		
	35343495	Arnold, Jimmy	02/26/20 14:03	02/26/20 14:00	jarnold-02262...	0:00:04	2hr STAT		

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

- 1 Search: A detailed description of Search is found on page 14.
- 2 Change TAT: This feature also allows the user to change the turn-around time, or TAT, assigned to a dictation.



	DID	Dictator	Uploaded	Dictated	File Name	Length	TAT	Report Type	ID #
	35362501	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032...	0:00:06	2hr STAT	XRAY	1001
	35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032...	0:00:09	2hr STAT		01099
	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09	jarnold-03032...	0:00:07	2hr STAT		01779
	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarnold-03032...	0:00:16	2hr STAT		
	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032...	0:00:48	2hr STAT		01099
	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29	jarnold-03032...	0:00:23	2hr STAT		
	35344679	Renault, James	02/26/20 17:29	01/15/18 19:38	jrenault-0115...	0:00:07	Standard		

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

STAT times available are Standard, 1 hour, (1hr), 2-hour, 4-hour, 8-hour, and 12-hour. Unless otherwise configured in the “On Time” feature by the Administrator, “Standard” is usually 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”.

3 Case Info: A detailed description of Case Info is found on page 35.

Columns

All available columns viewable in the All Documents Pending and their descriptions can be found starting on page 24.

Column Management

See page 28 for a full description of column management features.

File Display

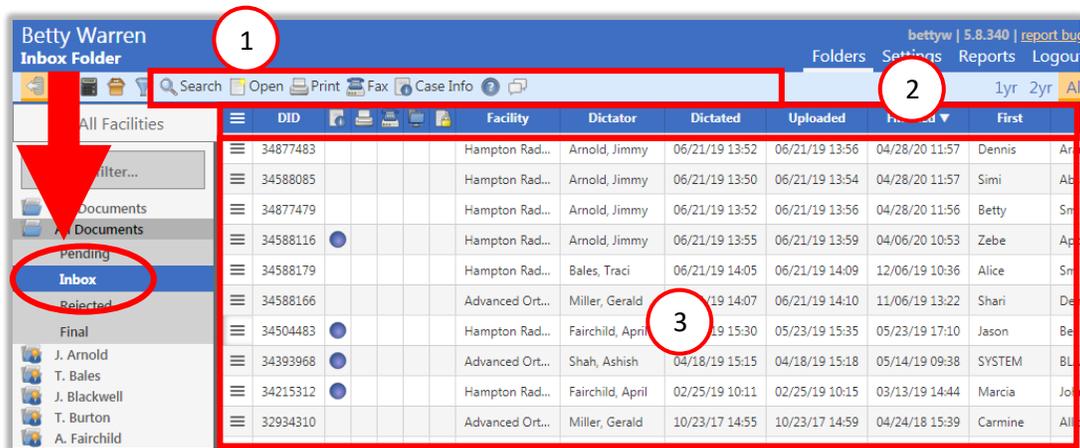
This section displays the dictations. All visible dictations in this folder are of the Pending status. For a detailed description of available file statuses and their meaning, see page 60. For a detailed description of Row and Page Settings, see page 22.

File Action Menu

All available “File Action Menu” options viewable in the All Documents Pending and their descriptions can be found starting on page 33.

Inbox

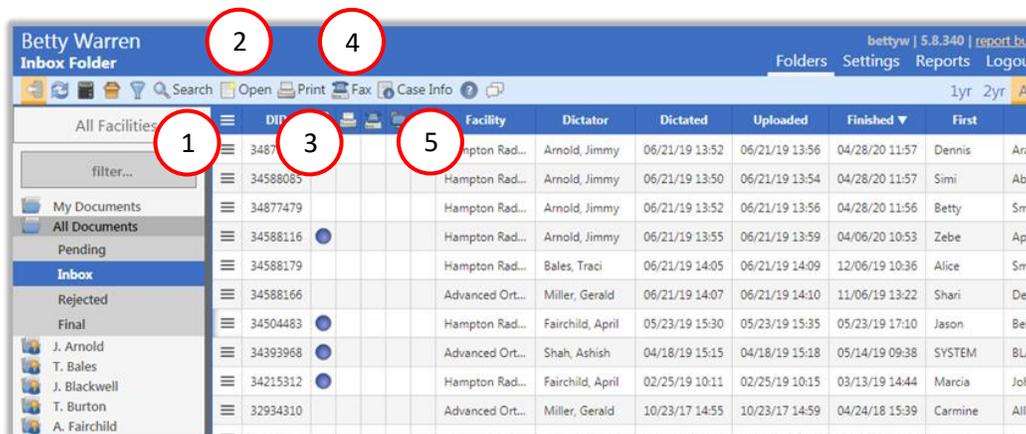
The “Inbox” folder contains the transcriptions completed by the Transcription Team. Documents can be opened, edited, faxed and printed. The transcriptions can be Finalized or eSigned (by the dictating provider) and moved to the “Final” folder for archive.



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 Pending folder. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.
- 2 **Columns:** Pending folder has several important columns available for the user.
- 3 **Files:** The central section of the Portal displays the files.

Folder Management Functions



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

- 1 Search: A detailed description of Search is found on page 14.
- 2 Open: "Open" is a permission-based function which enables users to open transcriptions using the Microsoft Word software installed on the local computer. Microsoft Word is accessed by WebChartMD's DocHandler (see page 8 for more information on the DocHandler). If the DocHandler is not installed (or if the user does not have edit permission), transcriptions will open in a non-editable PDF format.

Documents can be opened individually or in batches.

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

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

Paula Simpson
Inbox Folder

Search Open Print Finalize Reject Change Dictator Fax Case Info Delete

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

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
	34588166	Advanced Orth...		Miller, Gerald	06/21/19 14:07
	34504486	Hampton Radi...		Arnold, Jimmy	05/23/19 15:33
	34504489	Hampton Radi...		Arnold, Jimmy	05/23/19 15:30
	34393987	Advanced Orth...		Shah, Ashish	04/18/19 15:12
	34290097	Hampton Radi...		Arnold, Jimmy	03/15/19 18:01
	34215312	Hampton Radi...		Fairchild, April	02/25/19 10:11
	33737755	Maplewood Su...	Note	Reed, Samuel	09/11/18 09:23
	33737752	Caris, Sanders ...	Here's a note	Harding, David	09/11/18 09:18
	33499492	Maplewood Su...		Reed, Samuel	03/01/18 14:12
	33499490	Maplewood Su...		Reed, Samuel	03/20/18 11:26

- 3 Print: This is a permission-based function. This function prints the transcribed document into the default printer for the computer.

4 Fax

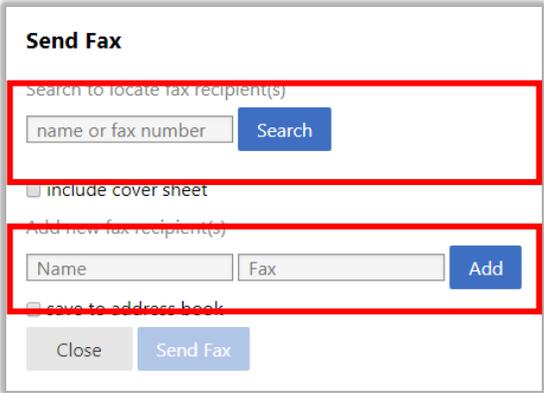
Fax is a permission-based function. Transcriptions can be faxed directly from the Portal, via either an automatic setting or manually. Automatic faxing is only available to Administrators, please speak with your Administrator for details.

To manually fax transcription(s) from the portal:

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

This window is divided into two sections:

- Search for Fax Recipient
- Add New Fax Recipient



1

2

1 Search on Fax Recipient

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

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

Send Fax

Search to locate fax recipient(s)

Smith

Select fax recipient(s)

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

include cover sheet

Add new fax recipient(s)

Name Fax

save to address book

Send Fax

Search to locate fax recipient(s)

201

Select fax recipient(s)

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

include cover sheet

Add new fax recipient(s)

Name Fax

save to address book

- 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

- 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:

- 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)

include cover sheet

Add new fax recipient(s)

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)

Select fax recipient(s)

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

include cover sheet

Add new fax recipient(s)

save to address book

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

Send Fax

Search to locate fax recipient(s)

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)

save to address book

3. Checking the “save to address book” checkbox will add the name and fax number to the Address Book for future use.
4. Checking the “include cover sheet” checkbox will add the cover sheet to the fax as a first page. Cover Sheet can be set by Transcription Team Administrators only.
5. The “Close” button closes the window without sending the Fax while the “Send Fax” button sends the fax to the selected recipients.

5 Case Info: A detailed description of Case Info is found on page 35.

Columns

All available columns viewable in the All Documents Inbox and their descriptions can be found starting on page 24.

Columns unique to the All Documents Inbox are:

Interfaced: This column displays if a transcription has been interfaced or not.

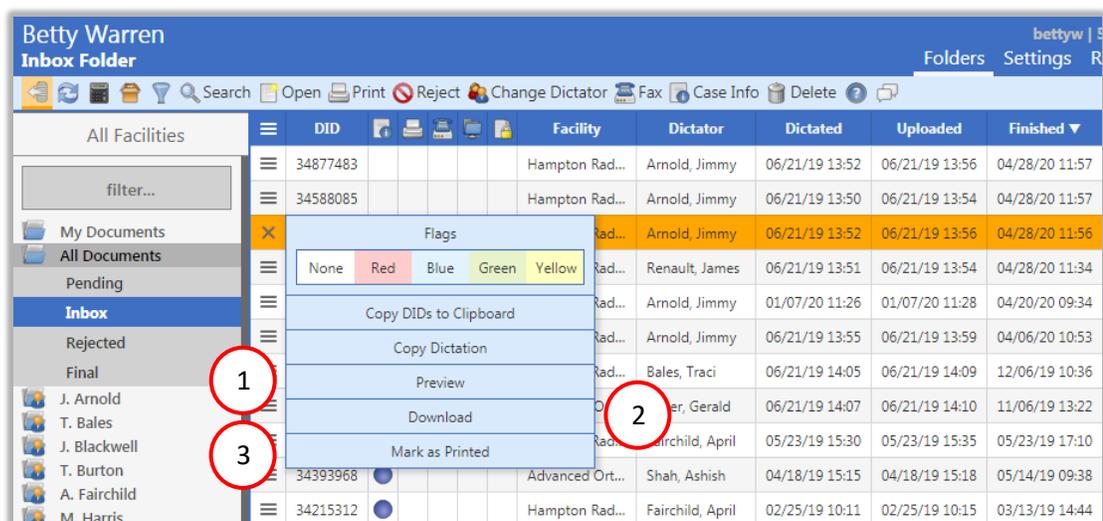
Column Management

See page 28 for a full description of column management features.

File Display

This section displays the transcriptions. All visible transcriptions in this folder are of the Inbox status. For a detailed description of available file statuses and their meaning, see page 60. For a detailed description of Row and Page Settings, see page 22.

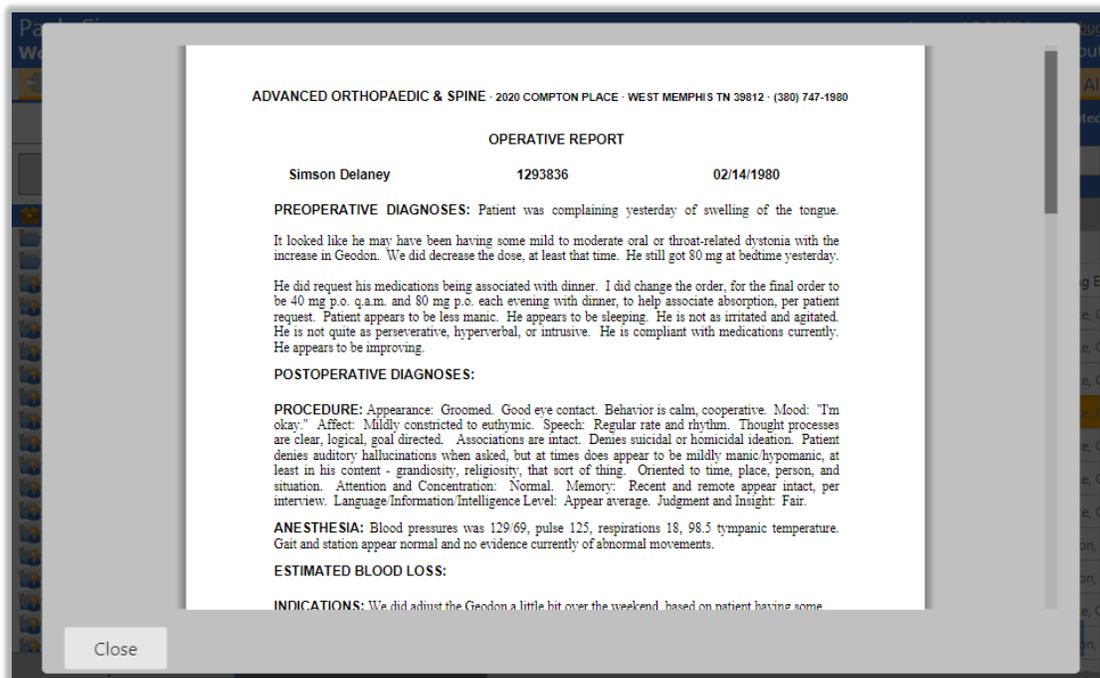
File Action Menu



All available “File Action Menu” options viewable in the My Documents QA and their descriptions can be found starting on page 32.

File Action new to the QA folder:

- 1 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.



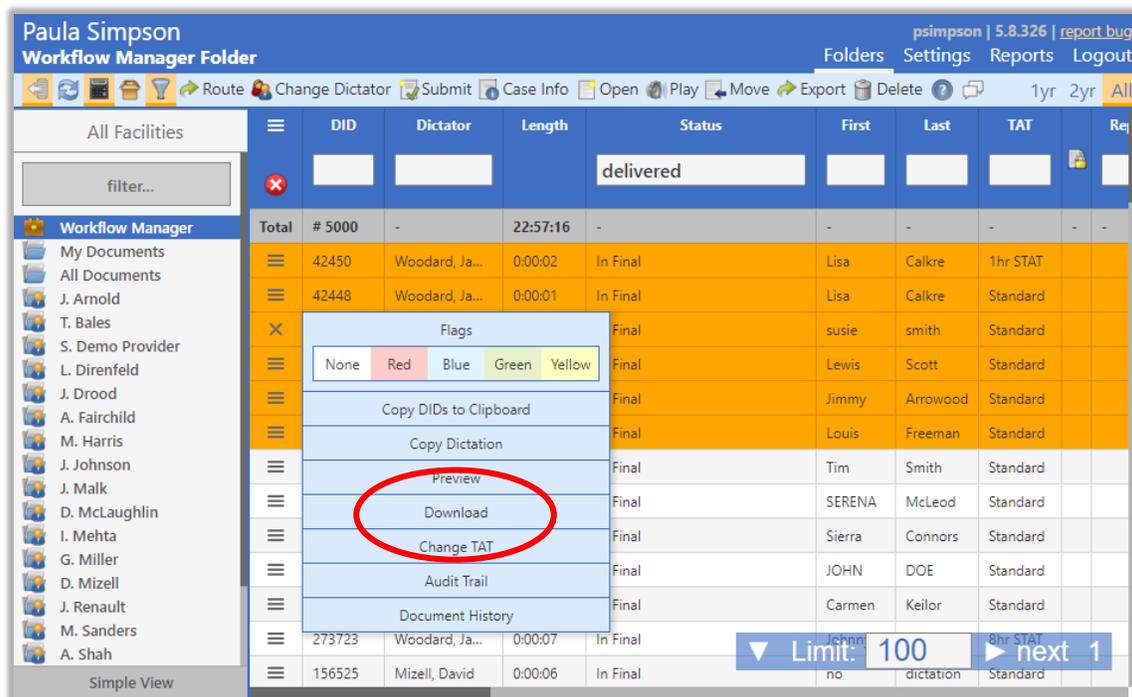
- 2 Download: This feature allows the user to download the transcribed document(s) to their computer as a .doc file. To download, the user clicks on the "Download" option on the Row Action Menu.

Setup:

The downloading process can be setup with these easy steps:

Step 1: Select file(s) to download

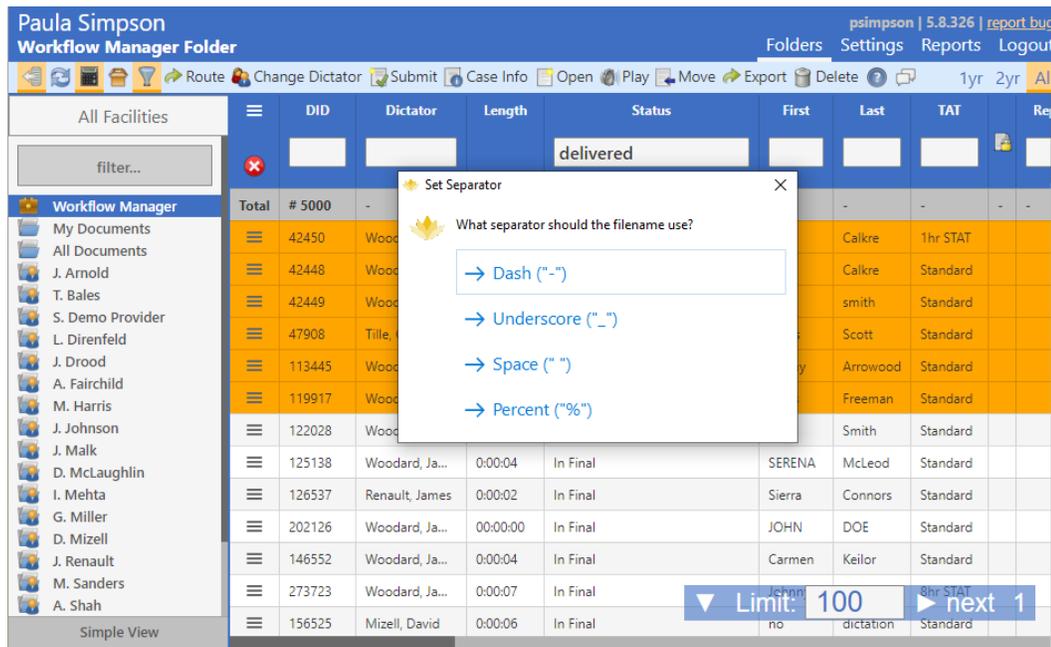
The user selects a single or multiple files and then clicks on the "Download" option of the "File Action Menu". This initiates the downloading process.



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:

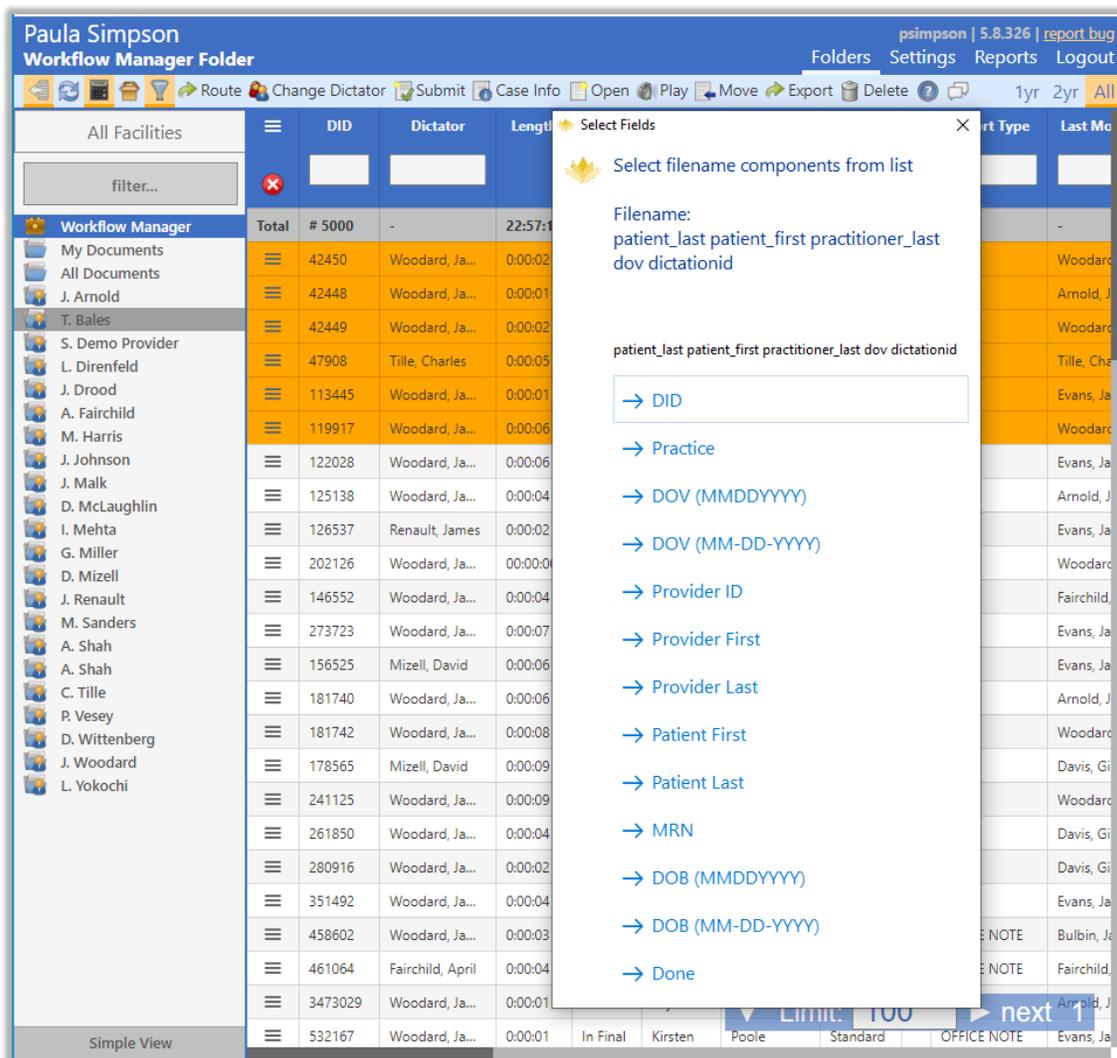
- Dash (“-“): This creates the file name using the dash between words.
Example: Andrew-Smith-Jessica-Johnson.doc
- Underscore (“_“): This creates the file name using the underscore between words.
Example: Andrew_Smith_Jessica_Johnson.doc
- Space (“ ““): This creates the file name using the space between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



Step 3: Select the desired file name components.

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

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



Examples of typical filenames are:

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

32101495-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).

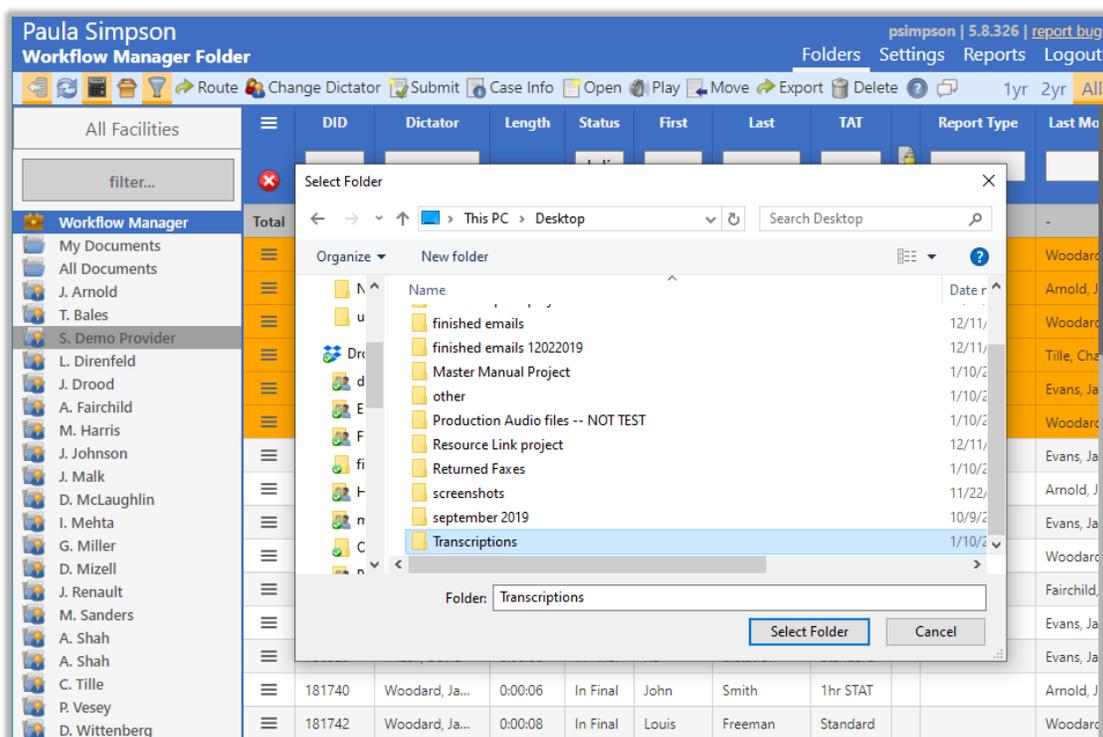
Step 4: Completing the filename

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.

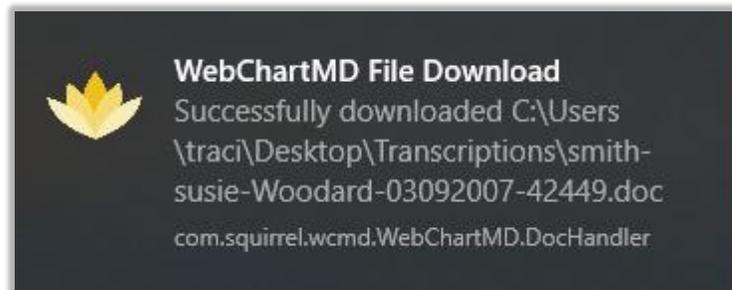
Step 5: Choose download location

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”.

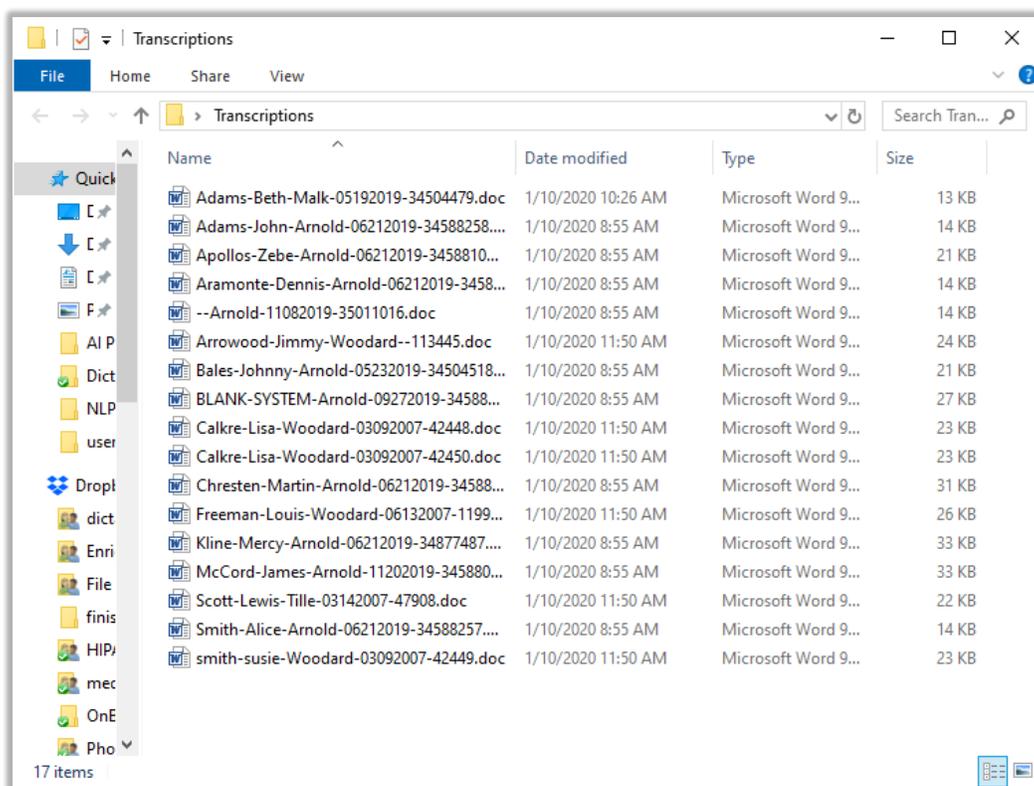


Step 6: Download completion

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.



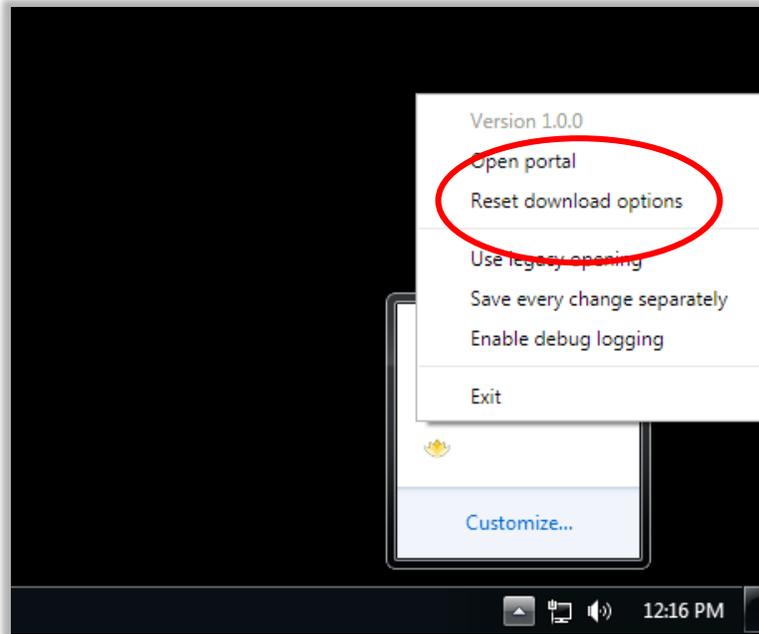
Download confirmation popup message



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. .



- 3 Mark as Printed: This marks the dictation as having been printed and adds the blue dot in the Printed column.

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.

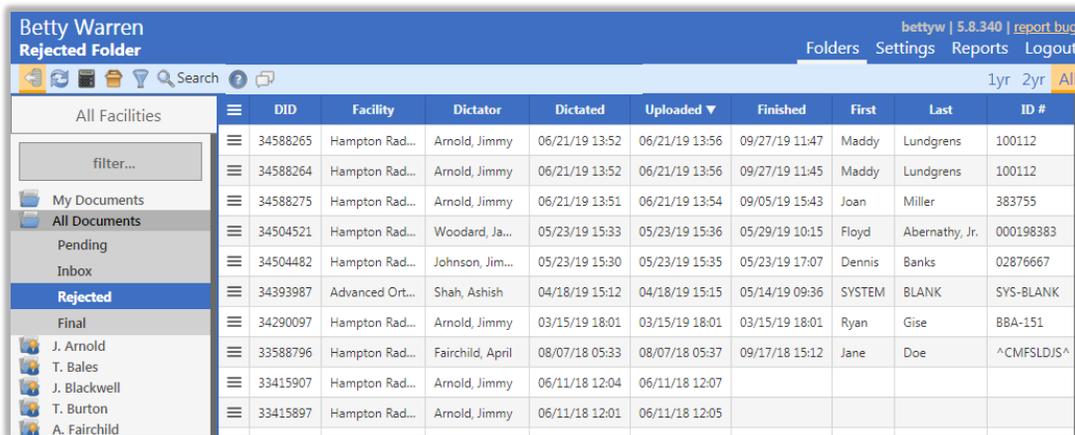


DID	Facility	Dictator	Dictated	Upload	Finished	First	Last	ID #
34588265	Hampton Rad...	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:52	09/27/19 11:47	Maddy	Lundgrens	100112
34588264	Hampton Rad...	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	09/27/19 11:45	Maddy	Lundgrens	100112
34588275	Hampton Rad...	Arnold, Jimmy	06/21/19 13:51	06/21/19 13:54	09/05/19 15:43	Joan	Miller	383755
34504521	Hampton Rad...	Woodard, Ja...	05/23/19 15:33	05/23/19 15:36	05/29/19 10:15	Floyd	Abernathy, Jr.	000198383
34504482	Hampton Rad...	Johnson, Jim...	05/23/19 15:30	05/23/19 15:35	05/23/19 17:07	Dennis	Banks	02876667
34393987	Advanced Ort...	Shah, Ashish	04/18/19 15:12	04/18/19 15:15	05/14/19 09:36	SYSTEM	BLANK	SYS-BLANK
34290097	Hampton Rad...	Arnold, Jimmy	03/15/19 18:01	03/15/19 18:01	03/15/19 18:01	Ryan	Gise	BBA-151
33588796	Hampton Rad...	Fairchild, April	08/07/18 05:33	08/07/18 05:37	09/17/18 15:12	Jane	Doe	^CMFSLDIS^
33415907	Hampton Rad...	Arnold, Jimmy	06/11/18 12:04	06/11/18 12:07				
33415897	Hampton Rad...	Arnold, Jimmy	06/11/18 12:01	06/11/18 12:05				

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. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.
- 2 **Columns:** Rejected folder has several important columns available for the user.
- 3 **File Display:** The central section of the Portal displays the files.

Folder Management Functions



Betty Warren									
Rejected Folder									
bettyw 5.8.340 report bug									
Folders Settings Reports Logout									
1yr 2yr All									
filter...	DID	Facility	Dictator	Dictated	Uploaded ▼	Finished	First	Last	ID #
My Documents	34588265	Hampton Rad...	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	09/27/19 11:47	Maddy	Lundgrens	100112
All Documents	34588264	Hampton Rad...	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	09/27/19 11:45	Maddy	Lundgrens	100112
Pending	34588275	Hampton Rad...	Arnold, Jimmy	06/21/19 13:51	06/21/19 13:54	09/05/19 15:43	Joan	Miller	383755
Inbox	34504521	Hampton Rad...	Woodard, Ja...	05/23/19 15:33	05/23/19 15:36	05/29/19 10:15	Floyd	Abernathy, Jr.	000198383
Rejected	34504482	Hampton Rad...	Johnson, Jim...	05/23/19 15:30	05/23/19 15:35	05/23/19 17:07	Dennis	Banks	02876667
Final	34393987	Advanced Ort...	Shah, Ashish	04/18/19 15:12	04/18/19 15:15	05/14/19 09:36	SYSTEM	BLANK	SYS-BLANK
J. Arnold	34290097	Hampton Rad...	Arnold, Jimmy	03/15/19 18:01	03/15/19 18:01	03/15/19 18:01	Ryan	Gise	BBA-151
T. Bales	33588796	Hampton Rad...	Fairchild, April	08/07/18 05:33	08/07/18 05:37	09/17/18 15:12	Jane	Doe	^CMFSLDJS^
J. Blackwell	33415907	Hampton Rad...	Arnold, Jimmy	06/11/18 12:04	06/11/18 12:07				
T. Burton	33415897	Hampton Rad...	Arnold, Jimmy	06/11/18 12:01	06/11/18 12:05				
A. Fairchild									

The first five icons from the left are consistent in all folders and more information on them can be found on page 14. More details on Search function can be found on page 14.

Columns

All available columns viewable in the All Documents Rejected and their descriptions can be found starting on page 24.

Column Management

See page 28 for a full description of column management features.

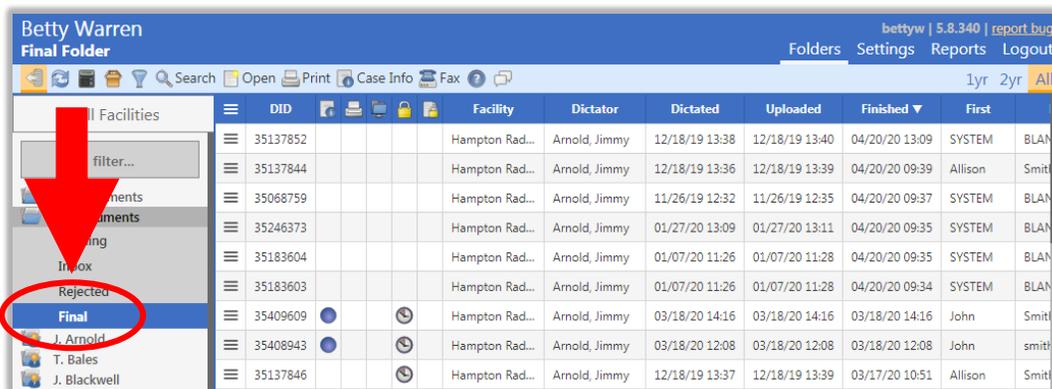
File Display

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 60. For a detailed description of Row and Page Settings, see page 22.

File Action Menu

All available “File Action Menu” options viewable in the All Documents Rejected and their descriptions can be found starting on page 33.

Final



DID	Facility	Dictator	Dictated	Uploaded	Finished	First
35137852	Hampton Rad...	Arnold, Jimmy	12/18/19 13:38	12/18/19 13:40	04/20/20 13:09	SYSTEM BLAN
35137844	Hampton Rad...	Arnold, Jimmy	12/18/19 13:36	12/18/19 13:39	04/20/20 09:39	Allison Smit
35068759	Hampton Rad...	Arnold, Jimmy	11/26/19 12:32	11/26/19 12:35	04/20/20 09:37	SYSTEM BLAN
35246373	Hampton Rad...	Arnold, Jimmy	01/27/20 13:09	01/27/20 13:11	04/20/20 09:35	SYSTEM BLAN
35183604	Hampton Rad...	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:35	SYSTEM BLAN
35183603	Hampton Rad...	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:34	SYSTEM BLAN
35409609	Hampton Rad...	Arnold, Jimmy	03/18/20 14:16	03/18/20 14:16	03/18/20 14:16	John Smit
35408943	Hampton Rad...	Arnold, Jimmy	03/18/20 12:08	03/18/20 12:08	03/18/20 12:08	John smit
35137846	Hampton Rad...	Arnold, Jimmy	12/18/19 13:37	12/18/19 13:39	03/17/20 10:51	Allison Smit

The “Final” folder works as an archive to store finalized and/or eSigned transcriptions. Documents are still accessible from within the Final folder similar to the Inbox 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 Final and their descriptions can be found starting on page 42. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.

Columns

All available columns viewable in the All Documents Final and their descriptions can be found starting on page 24.

Column Management

See page 28 for a full description of column management features.

File Display

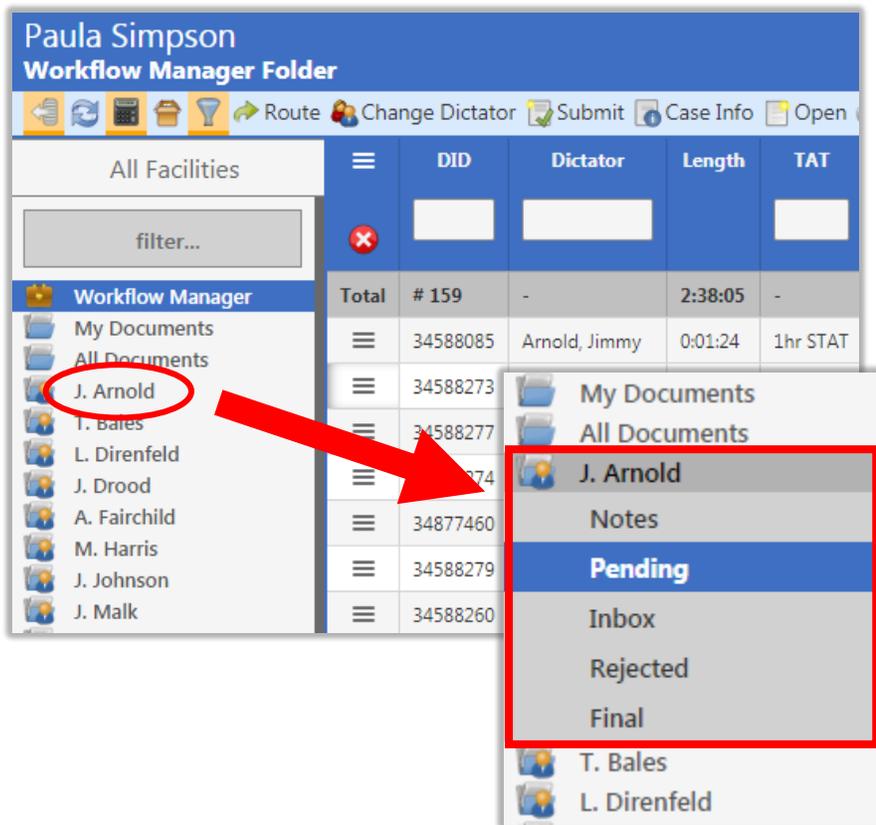
This section displays transcriptions that have been finalized by the Dictator. All visible transcriptions in this folder are of the Finalized status. For a detailed description of available file statuses and their meaning, see page 60. For a detailed description of Row and Page Settings, see page 22.



File Action Menu

All available “File Action Menu” options viewable in the All Documents Final and their descriptions can be found starting on page 33.

Dictator Folders



The screenshot displays the Paula Simpson Workflow Manager Folder interface. The top navigation bar includes icons for Home, Refresh, Print, Save, and a search icon, along with buttons for Route, Change Dictator, Submit, Case Info, and Open. Below the navigation bar is a filter input field labeled "filter...".

The main content area is divided into two panes. The left pane, titled "Workflow Manager", lists various folders: My Documents, All Documents, J. Arnold (circled in red), T. Bales, L. Direnfeld, J. Drood, A. Fairchild, M. Harris, J. Johnson, and J. Malk. A red arrow points from the "J. Arnold" folder to the right pane.

The right pane shows a table of workflow items with columns for DID, Dictator, Length, and TAT. The table includes a "Total" row and several rows for individual dictators. Below the table, a detailed view of the "J. Arnold" folder is shown, containing sub-folders: My Documents, All Documents, J. Arnold (selected), Notes, Pending (highlighted in blue), Inbox, Rejected, and Final. Below this view, other dictators like T. Bales and L. Direnfeld are partially visible.

	DID	Dictator	Length	TAT
Total	# 159	-	2:38:05	-
	34588085	Arnold, Jimmy	0:01:24	1hr STAT
	34588273			
	34588277			
	34877474			
	34877460			
	34588279			
	34588260			

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.

Auto Print

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

File Status

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

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

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.

** Please Note: Workflow Manager is a Transcription Team Administrator feature and not a feature applicable to Staff.

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.

Paula Simpson
Inbox Folder

psimpson | 5.8.326 | report bu
Folders Settings Reports Logou

Search Open Print Finalize Reject Change Dictator Fax Case Info Delete 1yr 2yr A

All Facilities	filter...	DID	Facility	Note	Dictator	Dictated Date	First
		35109384	Fidelity Insura...		Bales, Lowen	12/10/19 12:05	Mike
		34588166			...er, Gerald	06/21/19 14:07	Shari
		34504486			...ld, Jimmy	05/23/19 15:33	Franklin
		34504489			...ld, Jimmy	05/23/19 15:30	Jessica
		34393987			... Ashish	04/18/19 15:12	SYSTEM
		34290097			...ld, Jimmy	03/15/19 18:01	Ryan
		34215312			...child, Apri	02/25/19 10:11	Marcia
		33737755			... Samuel	09/11/18 09:23	Alberts
		33737752			...ing, David	09/11/18 09:18	Albert
		33499492			... Samuel	03/01/18 14:12	Lorie
		33499490	Maplewood S...		Reed, Samuel	03/20/18 11:26	Jane
		33499096	Maplewood S...		Conner, Charl...	07/09/18 13:51	Jimmy

File locked by another user

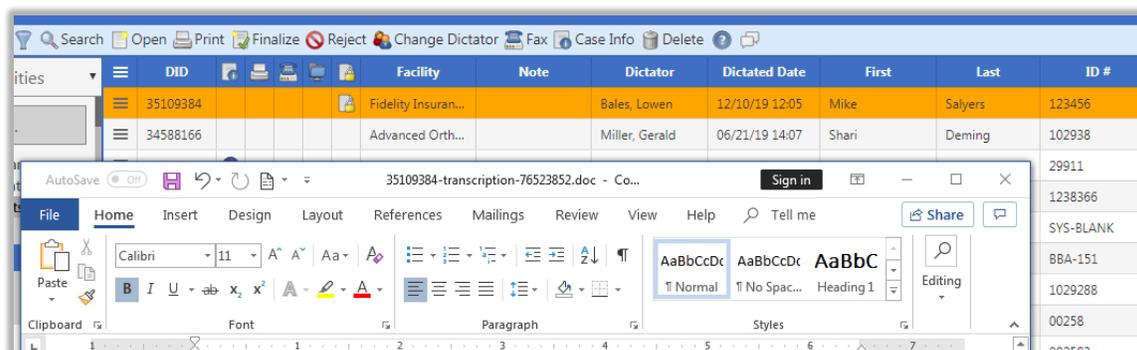
Another user has this document open. It has been locked to prevent editing. Any changes made will not be saved.

Click below to open a read-only copy or Cancel to exit.

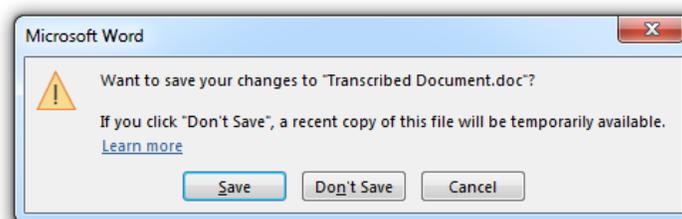
Open read-only Cancel

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.



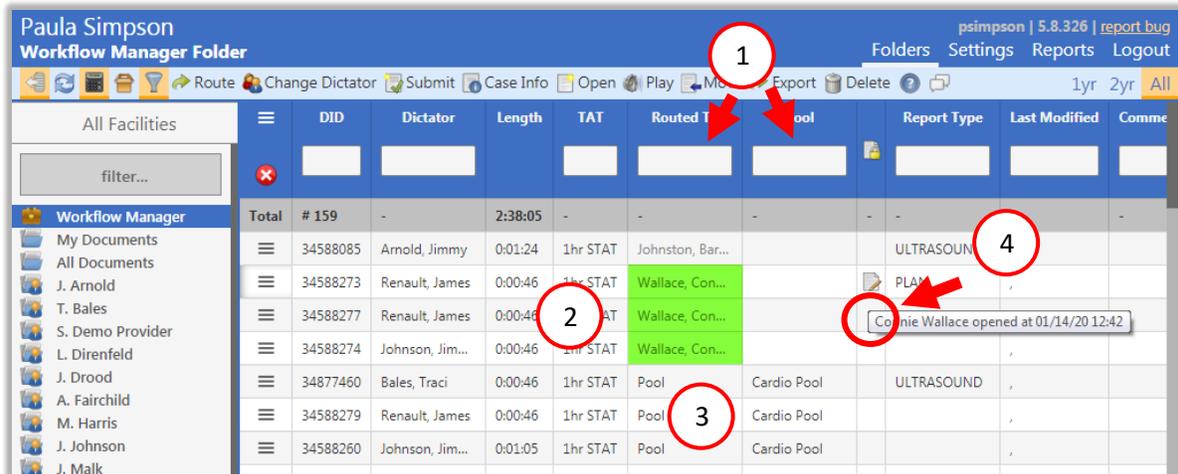
After edits are complete, save and close the transcription using the normal tools and workflow found within Microsoft Word. Clicking the “Save” button (below) saves changes to the authoritative copy of the transcription stored on the WebChartMD server and closes the transcription. Clicking “Don’t Save”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



Routing

Routing is a permission based feature.

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



Facilities	Filter	Did	Dictator	Length	TAT	Routed To	Pool	Report Type	Last Modified	Comments
Workflow Manager		Total	# 159	-	2:38:05	-	-	-	-	-
My Documents		34588085	Arnold, Jimmy	0:01:24	1hr STAT	Johnston, Bar...		ULTRASOUND		
All Documents		34588273	Renault, James	0:00:46	1hr STAT	Wallace, Con...		PLAY		
J. Arnold		34588277	Renault, James	0:00:46	1hr STAT	Wallace, Con...				
T. Bales		34588274	Johnson, Jim...	0:00:46	1hr STAT	Wallace, Con...				
S. Demo Provider		34877460	Bales, Traci	0:00:46	1hr STAT	Pool	Cardio Pool	ULTRASOUND		
L. Drenfeld		34588279	Renault, James	0:00:46	1hr STAT	Pool	Cardio Pool			
J. Drood		34588260	Johnson, Jim...	0:01:05	1hr STAT	Pool	Cardio Pool			
A. Fairchild										
M. Harris										
J. Johnson										
J. Malk										

- 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, 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 available to the Transcription Team Admin under the Workflow Rules section of the Settings view. 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, Pool setups & associations and Workflow Rules governing system routing provide more information.

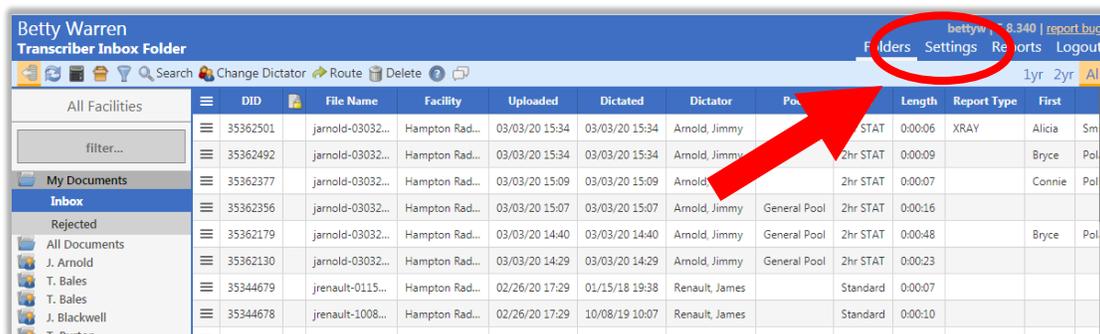
Interfacing

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.

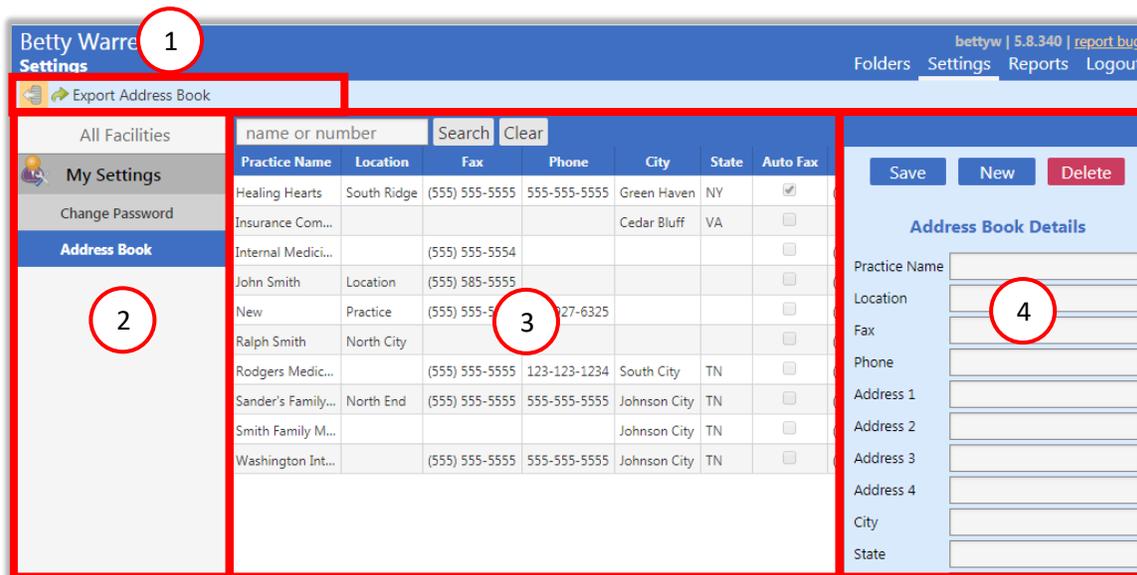
Settings View

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. Several Folder Management Functions are permission based and are not typically part of the Transcriptionist user type. Please speak with your Administrator for more details.

- 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

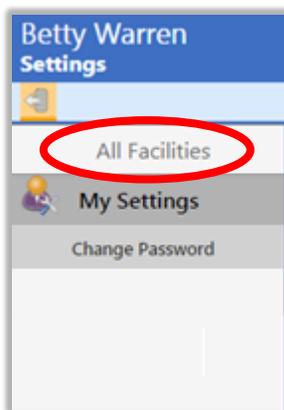
The Export Address Book function works just like the Export function under Inbox.

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.

Functions such as Route, Fax, Print, Delete and edit documents are permission based that can be provided to the Transcriptionist. Please speak with your administrator for details.

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.

View for Named Facility

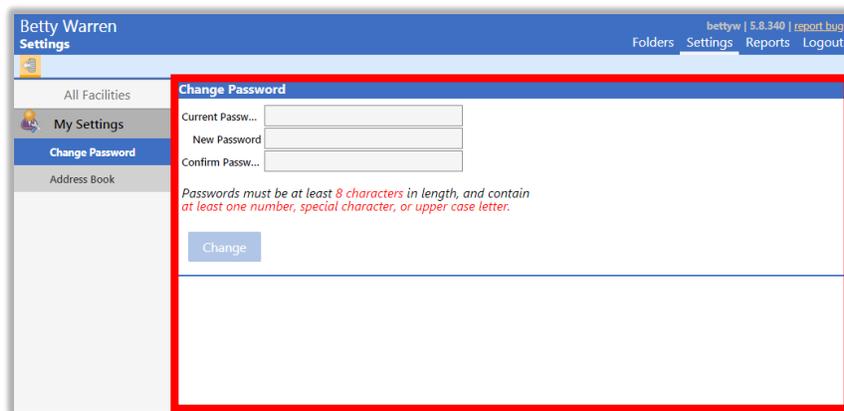


My Settings contains settings options and house-keeping tasks unique to the named Facility in the dropdown.

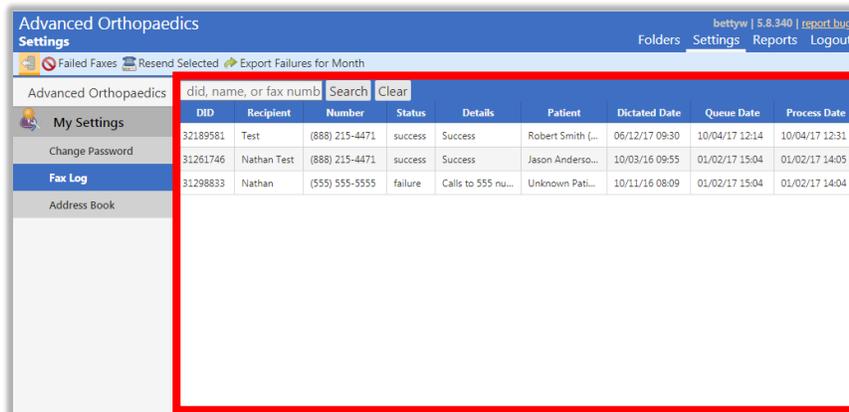
User Section

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:

**** Please Note:** Address Book is a permission-based feature and may not be accessible to all Transcription Company Staff. For instructions on the use of the Address Book, please speak to your Administrator for more details.



The screenshot shows the 'Change Password' form for user Betty Warren. The form includes three input fields: 'Current Passw...', 'New Password', and 'Confirm Passw...'. Below the fields is a red warning message: 'Passwords must be at least 8 characters in length, and contain at least one number, special character, or upper case letter.' A 'Change' button is located at the bottom of the form.



The screenshot shows the 'Fax Log' table for user Advanced Orthopaedics. The table has columns for DID, Recipient, Number, Status, Details, Patient, Dictated Date, Queue Date, and Process Date. The table contains three rows of data.

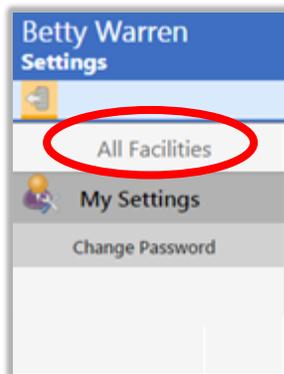
DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Date	Process Date
32189561	Test	(888) 215-4471	success	Success	Robert Smith (...)	06/12/17 09:30	10/04/17 12:14	10/04/17 12:31
31261746	Nathan Test	(888) 215-4471	success	Success	Jason Anderson...	10/03/16 09:55	01/02/17 15:04	01/02/17 14:05
31298833	Nathan	(555) 555-5555	failure	Calls to 555 nu...	Unknown Pati...	10/11/16 08:09	01/02/17 15:04	01/02/17 14:04

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. Several Settings Functions are not available to the Transcriptionist user. Please speak with your Administrator for more details.

“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 is one function available: .

Change Password is used for password updating.

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.



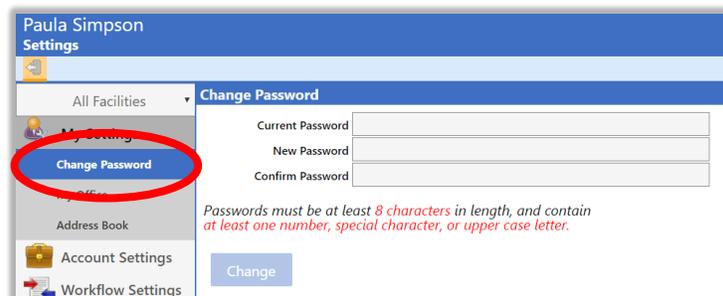
Within the My Settings area of a named Facility view, there is only one function available:

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



Paula Simpson
Settings

All Facilities

Change Password

Current Password

New Password

Confirm Password

Passwords must be at least 8 characters in length, and contain at least one number, special character, or upper case letter.

Change

“Named Facility” Functions

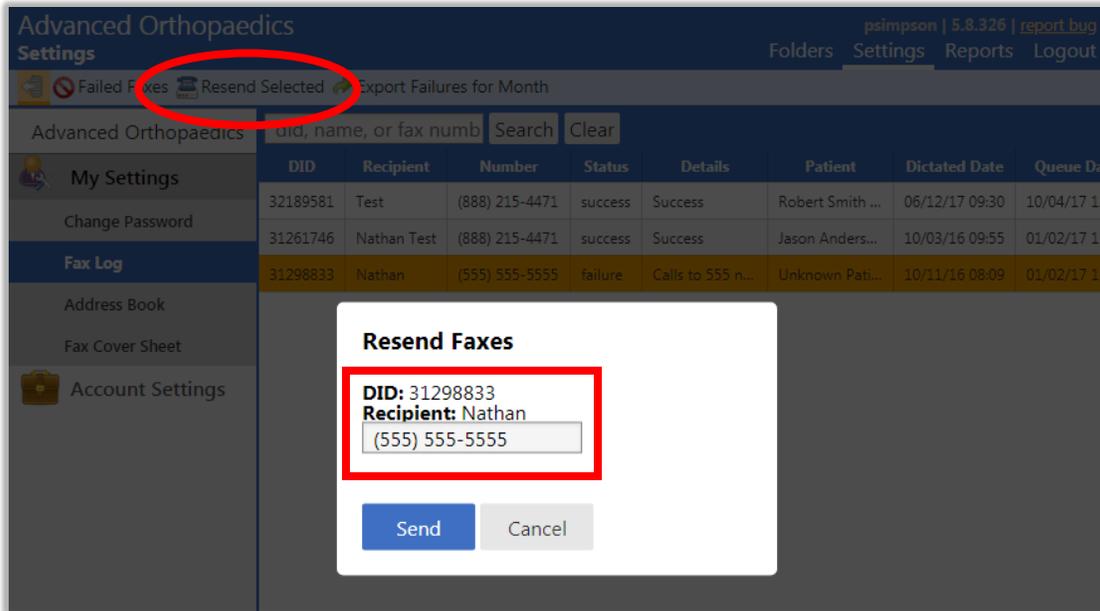
Fax Log

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



Advanced Orthopaedics | psimpson | 5.8.326 | report bug

Settings | Folders | Settings | Reports | Logout

Failed Faxes **Resend Selected** Export Failures for Month

Advanced Orthopaedics | did, name, or fax numb | Search | Clear

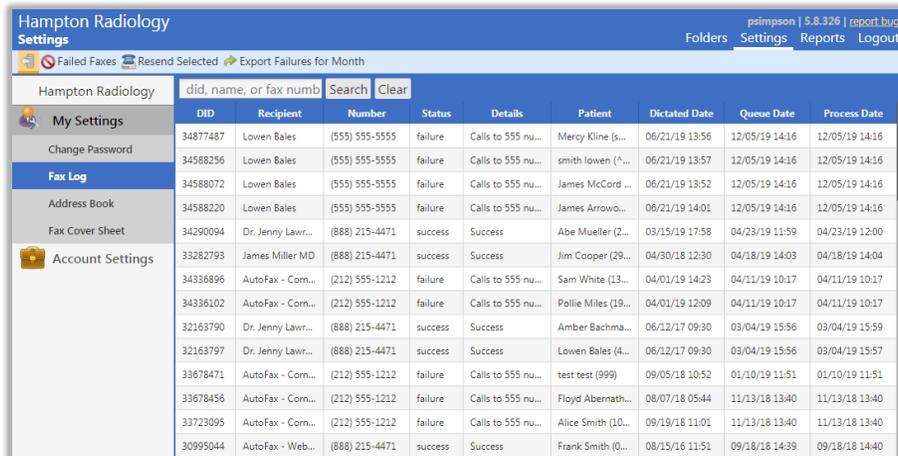
DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Da
32189581	Test	(888) 215-4471	success	Success	Robert Smith ...	06/12/17 09:30	10/04/17 12
31261746	Nathan Test	(888) 215-4471	success	Success	Jason Anders...	10/03/16 09:55	01/02/17 15
31298833	Nathan	(555) 555-5555	failure	Calls to 555 n...	Unknown Pati...	10/11/16 08:09	01/02/17 15

Resend Faxes

DID: 31298833
Recipient: Nathan

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.



Hampton Radiology | psimpson | 5.8.326 | report bug

Settings | Folders | Settings | Reports | Logout

Failed Faxes Resend Selected Export Failures for Month

Hampton Radiology | did, name, or fax numb | Search | Clear

DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Date	Process Date
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
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
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
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
34290094	Dr. Jenny Lawr...	(888) 215-4471	success	Success	Abe Mueller (2...	03/15/19 17:58	04/23/19 15:59	04/23/19 12:00
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



Export Failures for Month

This feature is currently disabled.

Fax Log Column Display

Columns displayed in the Fax Log and their meanings are:

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

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

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

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

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

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

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

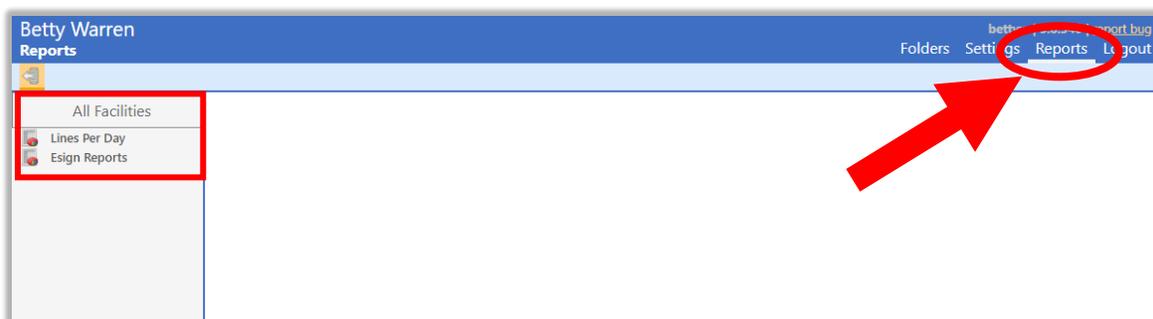
Queue Date: Displays the time & date when the transcription was triggered for auto-fax.

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

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. Several Reports are permission based and are not typically part of the Transcriptionist user profile. Please speak with your Administrator for more details.



Premade Reports

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

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

Appendix 1: Express Scribe

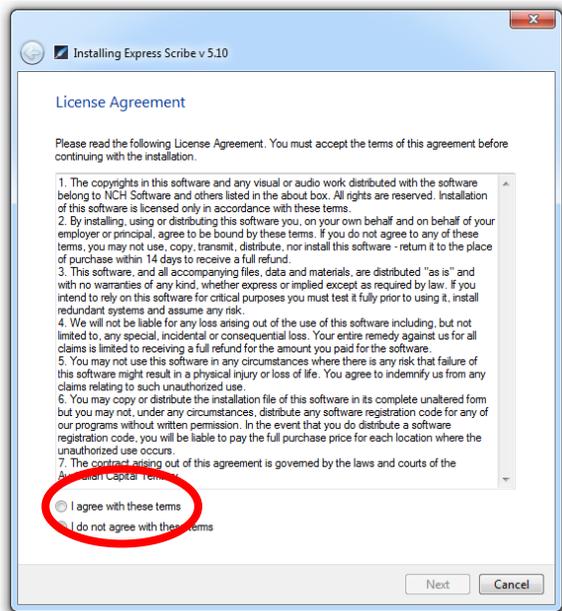


The Express Scribe version 5.10 can be downloaded from our Downloads page at www.webchartmd.com/downloads. It is listed as 'Express Scribe Setup'.

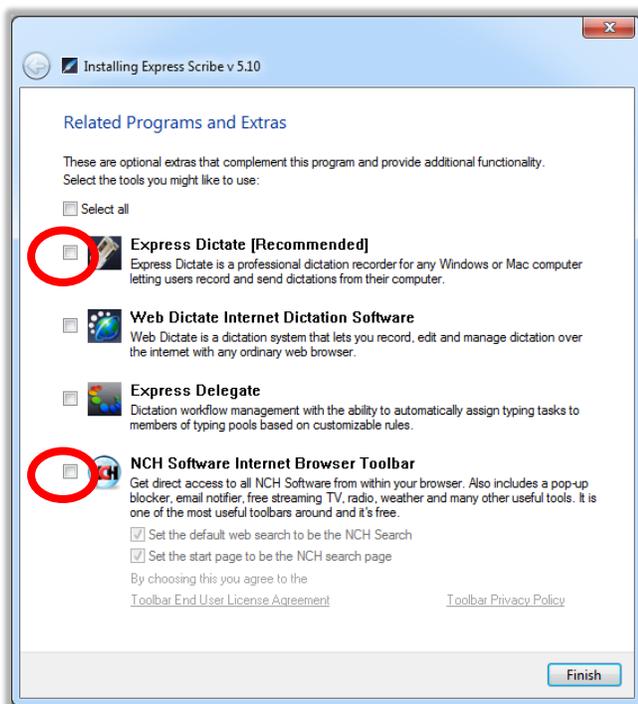
This version of Express Scribe can play the dss, mp3, wma and wav formats but is incompatible with .ds2 format. It can be installed on Windows 7, Windows 8 and Windows 10 machines.

For Windows 7 users:

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



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

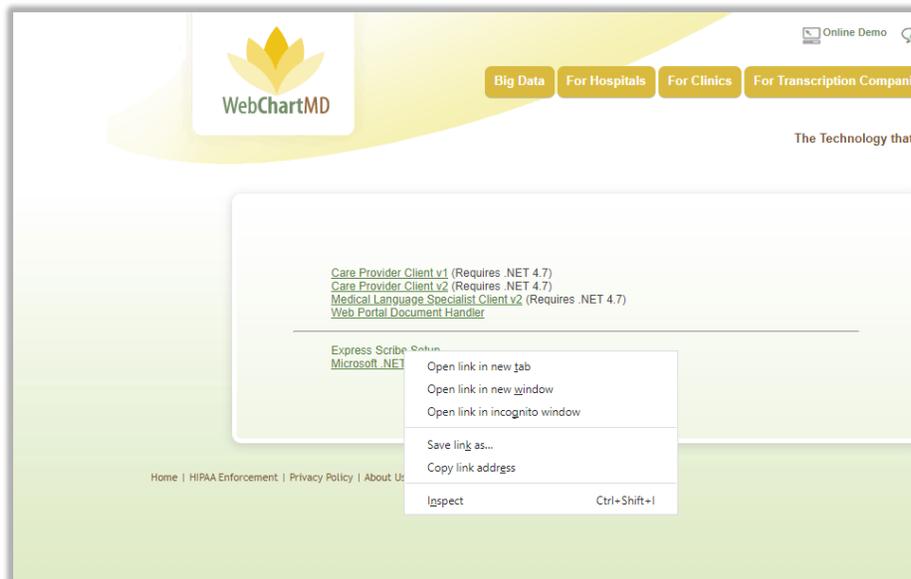


None of these options are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

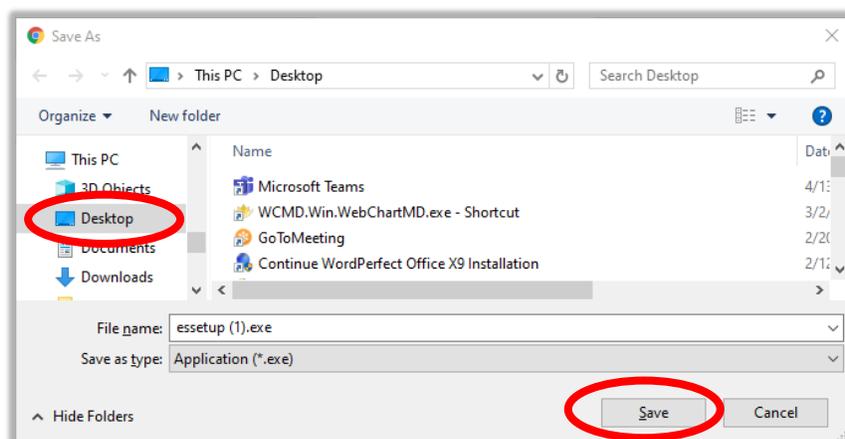
For Windows 8/10 only:

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.**

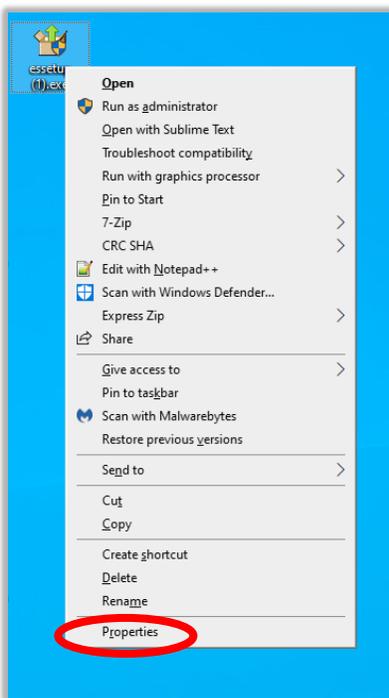
First the user needs to save the download to their desktop. To save the installer on the desktop, the user can right-click the 'Express Scribe Setup' link on the downloads page. Then click 'Save link as'.



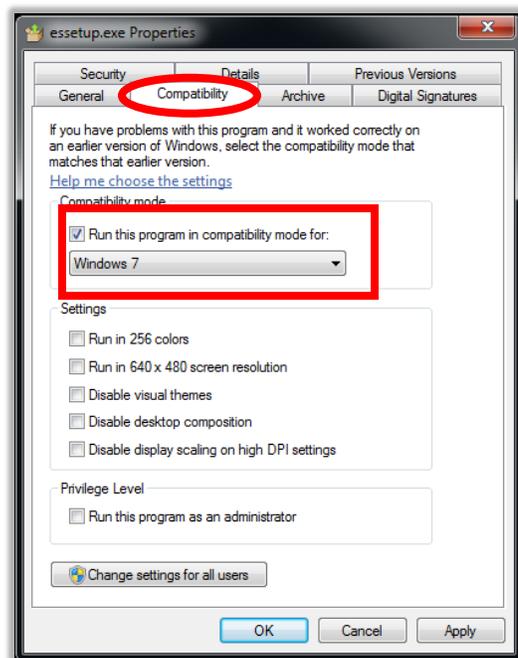
When the user clicks 'Save link as' they will be presented with a 'Save As' window. From here the user will need to save the download to their desktop.



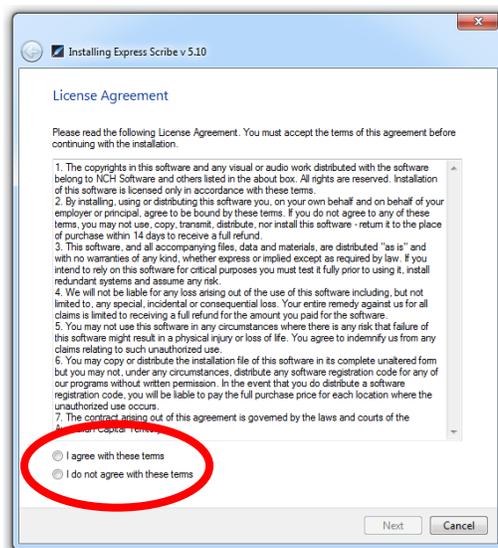
To set the Installation in Compatibility Mode on Windows 8 and 10, user needs to go to the Properties of the downloaded essetup.exe. To do so, right-click the installer and go to 'Properties' at the bottom of the window presented



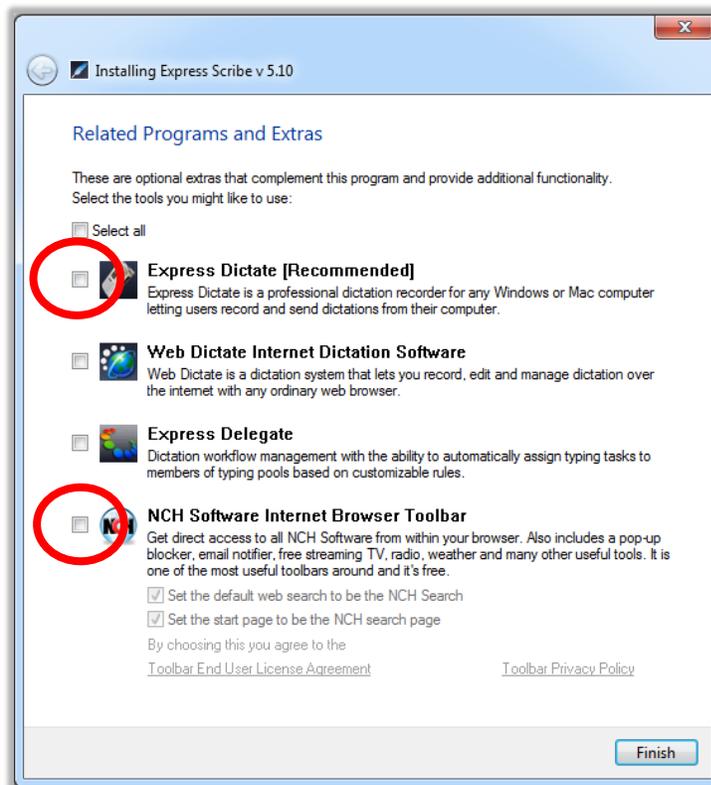
Once the Properties window opens, navigate to the Compatibility tab at the top, then look for the Compatibility Mode section. Check the checkbox that says, “Run the program in compatibility mode for” and then select ‘Windows 7’ and then click OK.



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.

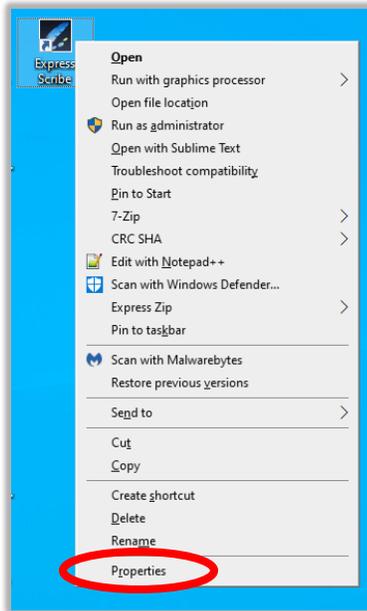


The next page has several extra options that NCH would like the user to try out and bundles them along with Express Scribe. However, none of these are required for Express Scribe to function and can be unchecked before clicking Finish. Clicking Finish installs the software and exits the install wizard.

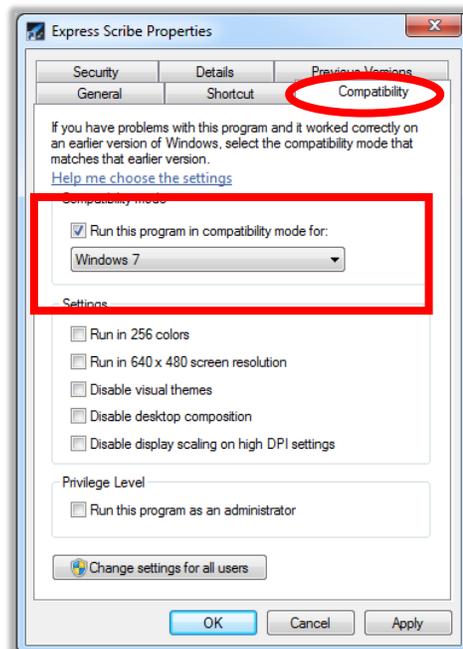


Once 'Finish' has been selected the shortcut for Express Scribe will be on the desktop. On Windows 7 the user can proceed to the next steps and setup their foot pedal (see below). However, on Windows 8 and 10, this may create two NCH Software windows to be presented automatically. Those two windows and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



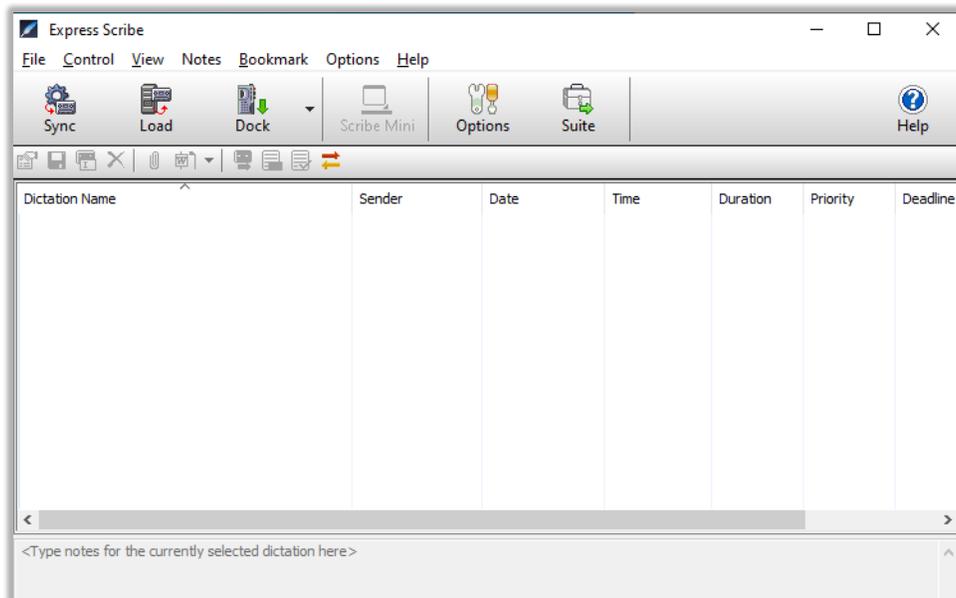
Again, just like before, the user sets the compatibility mode to Windows 7 under the Compatibility tab and click "OK".



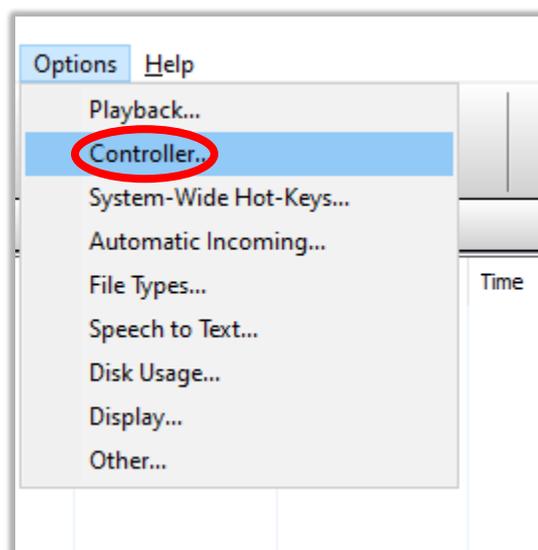
Once compatibility has been set, express scribe is installed and ready to be used.

Setting Up Foot Pedal:

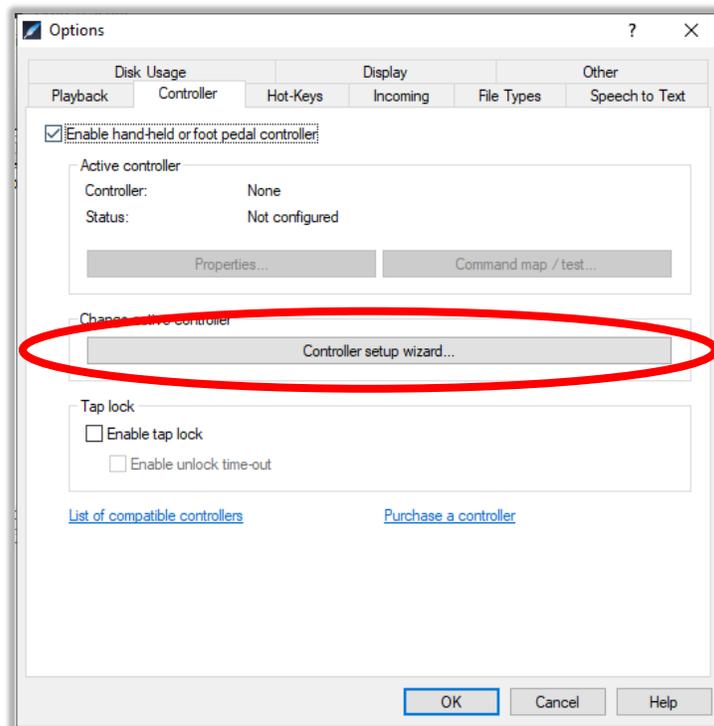
To set up the foot pedal, the user will go into the 'Options' tab in express scribe.



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.