

User Manual

Transcription Company Staff Version

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Welcome to WebChartMD!

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

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

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

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

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

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

Sincerely,

The team at WebChartMD



Glossary of Terms

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

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

Dictator: A user that authors the voice files.

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

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

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

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

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

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

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



Logging into the Portal

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



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

WebChartMD	For Hospitals For Clinics For Tran	Sonline Demo Contact Us Login
	Lernam: Basword: Legn Logn Digot pasword:	Over 5,000 healthcare professionals nationwide rely on WebChartMD for patient encounter documentation management needs.



Software Installation

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

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



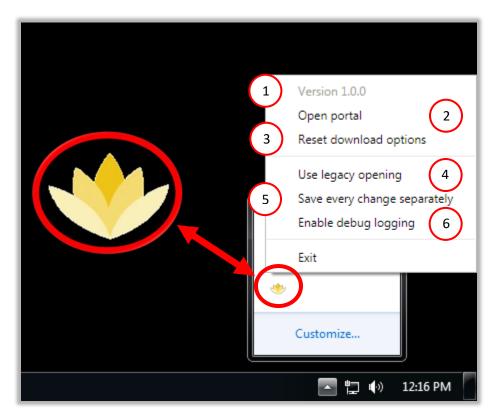
Once the download is complete, click the downloaded file to install it.

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

DocHandler

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





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

- 1 Version number: The current version of the DocHandler. The DocHandler updates automatically when new versions are available.
- 2) Open portal: Clicking this option launches the WebChartMD Login page. WebChartMD is compatible with Internet Explorer (version 10 and 11), Google Chrome, Mozilla Firefox, Safari and Opera.
- 3 Reset download options: This option works in conjunction with the Download option of the dictations (on page 63) resetting both the file naming convention and preferred download location as set by the user.
 - Use legacy opening: This option is used by WebChartMD support staff to troubleshoot the DocHandler.

5

Save every change separately: Checking this option enables the user to manually save edits to a document on demand by using the control+S shortcut or pressing the "save" icon along the top edge of Microsoft Word.



6

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

Initial View When Logging In

1 Paula Simpson Franscriber Inbox Folde	. (2			7		3 4 impson 5.8.326 tings Reports	
all Facilities	ch 絶	Change Dict DID	tator 🇼 R Length	oute 🎁 Delete Facility	Dictator	Dictated Date	1y Uploaded Date	r 2) R 6
		32205818	0:01:03	Advanced Ort	Vesey, Philip	06/13/17 16:45	06/13/17 16:48	Pool
filter	=	34761531	0:00:03	Maplewood S	Reed, Samual	03/01/18 14:12	07/09/18 15:01	Pool

Name

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



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View and Folder Name

The **View Name** is displayed right underneath the user' name. The view name changes as the user navigates to different folders and comes in handy when visiting different folders.

Username

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

Version Number

The Version Number is displayed next to the username.

Report Bug

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

Log out Button

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



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. transcriptions. 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 75.
- The Reports view displays the Reporting suite. More details can be found on page 89.



Folders View



Folder View Overview

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

📔 🔁 👕 😭 🔍 Sei	arch 🙈	Change Dict	ator 🧼 Route 💡	Delete 🕜 🗇								1yr 2yr	• /
All Facilities	=	DID	📔 🛛 File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length	Report Type	First	
	=	35362501	jarnold-0303	2 Hampton Rad	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06	XRAY	Alicia	\$
filter	=	35362492	jarnold-0303	2 Hampton Rad	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09		Bryce	
My Documents	=	35362377	jarnold-0303	2 Hampton Rad	03/03/20 15:09	03/03/20 15:09	Arnold, Jimmy		2hr STAT	0:00:07		Connie	
Inbox	=	35362356	jarnold-0303	2 Hampton Rad	03/03/20 15:07	03/03/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16			
Rejected	=	35362179	jarnold-0303	2 Hampton Rad	03/03/20 14:40	03/03/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48		Bryce	Π
All Documents J. Arno	=	35362130	jarnold-0303	2 Hampton Rad	03/03/20 14:29	03/0	Arnold, Jimmy	General Pool	2hr STAT	0:00:23			
т. ва 2	=	35344679	jrenault-0115	Hampton Rad	02/26/20 17:29	01, 3	Renault, James		Standard	0:00:07			
T. Bale J. Blackwell	=	35344678	jrenault-1008	Hampton Rad	02/26/20 17:29	10/08/	Renault, James		Standard	0:00:10			
T. Burton	=	35344677	tracibales16-	Hampton Rad	02/26/20 17:29	10/08/19 10:07	Bales, Traci		Standard	0:00:04			
A. Fairchild M. Harris	=	35344673	tracibales16-	Hampton Rad	02/26/20 17:28	10/08/19 10:07	Bales, Traci		Standard	0:00:04			
J. Johnson		35343501	iarnold-0226	2 Hampton Rad	02/26/20 14:04	02/26/20 14:01	Arnold, Jimmy	General Pool	2hr STAT	0:00:02			
J. Malk		35343500	jarnold-0226	2 Hampton Rad	02/26/20 14:04	02/26/20 14:00	Arnold, Jimmy	General Pool	2hr STAT	0:00:11			
C. Martin D. McLaughlin		35343495	jarnold-0226		02/26/20 14:03	02/26/20 14:00	Arnold, Jimmy	General Pool	2hr STAT	0:00:04			
I. Mehta		35343494	jarnold-0226		02/26/20 14:03	02/26/20 14:00	Arnold, Jimmy	General Pool	2hr STAT	0:00:02			
G. Miller						02/26/20 14:00				0:00:02			
D. Mizell J. Renault	=	35343351	jarnold-0226	2 Hampton Rad	02/26/20 13:45	02/20/20 13:42	Arnold, Jimmy	General Pool	2hr STAT	0:00:06			

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

Folder Pane: Displays all folders used in the workflow.

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



Folder Management Functions

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

Paula Simpson Transcriber Inbox Folde	er						impson 5.8.326 tings Report:	
🗐 🔁 🗑 骨 🦞 🔍 Sea	rch 🔏 🤇	Change Dict	tator 🧼 Re	oute 闠 Delete (0 🕫	5 - 165 	(7) 1y	r 2yr A
All Facilities		DID	Length	Facility	Dictator	Dictated Date	Uploaded Date	Route
		322058				0042424045	00/07/07/07/07/0	-
filter	=	34761531			2		Searc	-h
Workflow Manager	=	33737753	0				Juli	_ II ng
My Documents	=	33737753 34512978	00:00-00	Fidelit-Insura		05/28/19 14:33	05/28/19 14:33	Bales, Zo
				Fidelit-Insura		05/28/19 14:33	v	ng

- 1 **Pin Sidebar** This toggle button shows or hides the folder pane containing folders below the All Facilities column.
 - **Refresh** Refreshes the data on the page. This can be used to refresh the view after moving columns, changing flags or after closing a document to update the data displayed.
- 3) Show Totals Shows total across the top of dictations in a grey row. This helps the user see the number of dictations and other information at a quick glance without having to calculate. Number of dictations and total length of all audio files are two common uses.
- **Sort By** Groups the dictations based on selected criteria such as a specific date or a Dictator.
- **Filter** Adds filter boxes underneath column headers, allowing user to filter the data. The user hides dictations based on excluded data and only views the filtered results.
- **Search** Allows the user to search the files for specific information. More details can be found on page 23.
- 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.

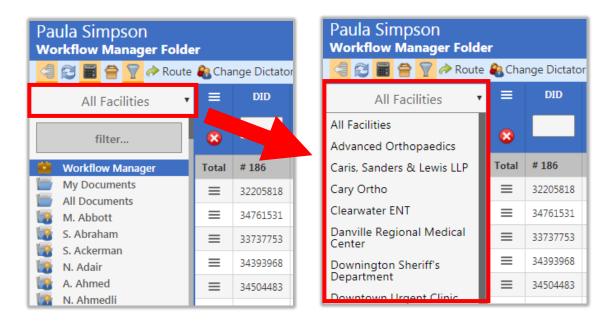
Several other folder management functions appear on the Workflow Management Toolbar, depending on which folder the user is in. Details of these functions are provided in the individual folders.

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 Accounts that the Transcription Team staff member 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, My Documents, All Documents, and the folders for each Dictator serviced by the Transcription Team. Details related to each folder view are described in upcoming sections of the manual.



Folders

There are 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 21.

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 48.

Dictator Folders: Below the "All Documents" and its folders are the Dictator Folders. These are laid out alphabetically by the last name of the provider. More information on Dictator Folders can be found on page 68.

Betty Warren Transcriber Inbox Folde	r	
⊴ 🔁 🗃 骨 ү 🔍 Sear	ch 용	Char
All Facilities	≡	
	, ≡	353
filter	⊨	353
🔄 My Documents	=	353
Inbox	=	353
Rejected All Documents	=	353
J. Arnold	≡	353
T. Bales	≡	353
J. Blackwell T. Burton	≡	353
Betty Warren Pending Folder	:h 🕓 (Chang
All Facilities		D
		353(
filter	≡	353(
Mv Documents	=	353(
All Documents	≡	353(
Pending	=	353(
Rejected	≡	353(
Final	≡	3534

J. Arnold

J. Blackwell

T. Bales

6

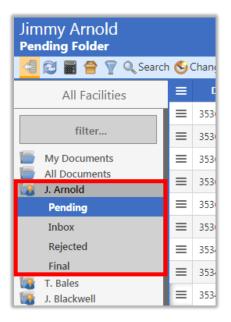
3534

3534

The Inbox folder within "My Documents" is selected.

The Notes folder within "All Documents" is selected.





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



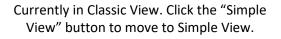
Folder View Options

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

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

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

🚄 🔁 📓 🚔 🍸 🔍 Sea	rch 🙈	Change Dic	tator
All Facilities	≡	DID	Dic
	1 =	35183614	01/
filter	=	35183615	01/
📓 Workflow Manager	1 =	35183611	01/
My Documents		35183604	01/
Inbox Rejected		35183603	01/
QA		35183602	01/
Draft		35183606	01/
All Documents	=	35183488	01/
J. Arnold T. Bales	=	35183486	01/
S. Demo Provider	=	35183485	01/
L. Direnfeld		35183487	01/
🔏 A. Fairchild	=	35183480	01/
M. Harris J. Johnson	=	35183478	01/
J. Malk	=	35137852	12/
D. McLaughlin	=	35137843	12/
G. Miller		35137842	12/
D. Mizell	=	35137846	12/
J. Renault	=	35137841	12/
M Canders Simple View	=	35137841	12/



Paula Simpson Transcriber Inbox Folder			
🗐 🔁 冒 骨 🍸 🔍 Search	e	Change Dict	tator
All Facilities	≡	DID	Dic
All Dictators	=	35183614	01/0
	≡	35183615	01/0
Workflow Manager	≡	35183611	01/0
My Documents	≡	35183604	01/0
Inbox	≡	35183603	01/0
Rejected	≡	35183602	01/0
QA	≡	35183606	01/0
	≡	35183488	01/0
Draft	=	35183486	01/0
All Documents	≡	35183485	01/0
	≡	35183487	01/0
	≡	35183480	01/0
	≡	35183478	01/0
	=	35137852	12/1
	=	35137843	12/1
	≡	35137842	12/1
	=	35137846	12/1
	=	35137841	12/1
Classic View	=	35137840	12/1

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.

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

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



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



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



My Documents

The 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 three folders with the My Documents view:

Betty Warren Transcriber Inbox Folder								Folder		5.8.340 Reports	
🔄 🔁 🗑 骨 💡 🔍 Searc	:h ୡ	Change Dic	tato	🔿 🧼 Route 🍟 D	elete 🕜 🗇					1yr	2yr All
All Facilities	≡	DID	1	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
filter	≡	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
QA 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	≡	35344678		jrenault-1008	Hampton Rad	02/26/20 17:29	10/08/19 10:07	Renault, James		Standard	0:00:10
T. Burton	=	35343501		jarnold-02262	Hampton Rad	02/26/20 14:04	02/26/20 14:01	Arnold, Jimmy	General Pool	2hr STAT	0:00:02
A. Fairchild	=	35343500		iamold-02262	Hampton Rad	02/26/20 14:04	02/26/20 14:00	Arnold limmy	General Pool	2hr STAT	0.00.11

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

<u>QA</u>: This displays the transcriptions that need to be checked for Quality Assurance before being delivered to the Dictator.

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



Inbox

1

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

Betty Warren Transcriber Inbox Folder		1					G	Folder	bettyw s Settings	5.8.340 Reports	
🗐 🔁 📓 🚔 🍸 🔍 Search	- 🙈 (Change Dic	tator	🕐 Route 🗑 De	elete 🕜 🗇		2			1yr	2yr All
All Facilities	=	DID	4	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
filter	=	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	03/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16
Pojected	=	35362179		jarnold-03032	Hampton Rad	03/03/20 14:	3 3/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48
QA 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	=	35344678		jrenault-1008	Hampton Rad	02/26/20 17:29	10/08/19 10:07	Renault, James		Standard	0:00:10
T. Burton	=	35343501		jarnold-02262	Hampton Rad	02/26/20 14:04	02/26/20 14:01	Arnold, Jimmy	General Pool	2hr STAT	0:00:02
A. Fairchild	_	25242500		·		02/25/20 1104	02/25/20 1102	A 11.12	C 10 1		0.00.11

The Inbox folder consists of three important areas:

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

- 2 **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

🗐 🔁 🗃 音 🍸 Q. Sea	arch 🍓	Change Dic	tator 🧼 I	Route 闠 Delete	00					1yr 2y	yr A
All Facilities		DID	Lengt	Facility	TAT	Dictator	Pool	14	Dictated Date	Uploaded Date 🔻	
	1)=	35137852	0:00	3 Ipton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:38	12/18/19 13:40	Po
filter	=	35137846	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Po
Workflow Manager	=	35137845	0:00:04	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Po
My Documents	=	35137844	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:36	12/18/19 13:39	Po
Inbox Rejected	=	35137843	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Po
QA	=	35137842	0:00:04	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Po
All Documents	=	35137841	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Po
M. Abbott S. Abraham	=	35137840	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Po
S. Ackerman	=	35137832	0:00:04	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:36	12/18/19 13:38	Po

The first five icons from the left are consistent in all folders and more information on them can be found on page 15. The next four icons are permission-based, and are explained in detail below:

Functions unique to the My Documents Inbox are:

\frown	
1)	Search
\smile	

Paula Simpson Transcriber Inbox Folder											i pson 5.8.326 ngs Reports	
🗐 🗃 🚔 🍸 🔍 Searci	h 🙈 (Change Dict	tator 🧼 F	Route 簤 Delete	0 🗇						1yr	2yr All
All Facilities	Filt	er Criteria	a									
filter	L	Dicta Jploaded Fr	_	mpton Radiol	o] Arnol	d, Jimn 🔻	Uploa		DID			
My Documents		Filena	me				I	Routi	ing		۲	
Inbox		Work Ty	/pe					Jol	b #			
Rejected												
QA All Documents	2	Search Pas	t Year	Search All	Clo	ose						
M. Abbott	=	DID	Length	Facility	TAT	Dictator	Pool		Dictated Date	Uploaded Date	Routed To	File N
S. Abraham S. Ackerman	=	35137852	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:38	12/18/19 13:40	Pool	jarnold-
🚺 N. Adair	=	35137846	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Pool	jarnold-
A. Ahmed N. Ahmedli	=	35137845	0:00:04	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:37	12/18/19 13:39	Pool	jarnold-
C. Aiken	=	35137844	0:00:03	Hampton Rad	2hr STAT	Arnold, Jimmy	General Pool		12/18/19 13:36	12/18/19 13:39	Pool	jarnold-

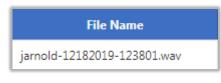
The Search function is found in almost every folder view and provides the user with the ability to quickly search for a dictation or transcription by using one or multiple search criteria.

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.



2 Change Dictator

Betty Warren Transcriber Inbox Folder											Fol	be ders Settin
🔁 🔁 📓 쓸 🝸 🔍 Sear		Change Dic	_	0	oute 🗃 Delete 🕜 🗇							
All Facilities	Cne	nge Diet										
filter		C	ictato	r		▼						
My Documents		Change		c	[Advanced O] Harris, Monique [Advanced O] Miller, Gerald							
Inbox		DID			[Advanced O] Shah, Ashish	- 1	ictated	Dictator	Pool	TAT	Length	Report Type
QA	=	35362501		ja	[Advanced O] Vesey, Philip [Hampton Ra] Arnold, Jimmy		3/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06	XRAY
All Documents	≡	35362492		ja	[Hampton Ra] Bales, Traci	- 1	3/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09	
 J. Arnold T. Bales 	≡	35362377		ja	[Hampton Ra] Blackwell, John	- 1	3/20 15:09	Arnold, Jimmy		2hr STAT	0:00:07	
J. Blackwell	≡	35362356		ja	[Hampton Ra] Fairchild, April [Hampton Ra] Johnson, Jimmy		3/20 15:07	Arnold, Jimmy	General Pool	2hr STAT	0:00:16	
T. Burton	≡	35362179		ja	[Hampton Ra] Malk, Jason		3/20 14:40	Arnold, Jimmy	General Pool	2hr STAT	0:00:48	

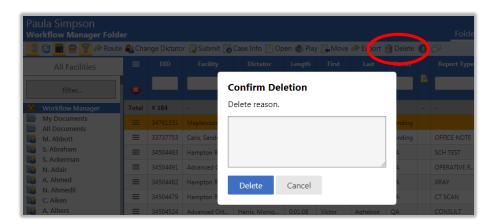
The "Change Dictator" function is used when Files need to be moved from one Dictator's folders to another Dictator. The user selects a dictation and then clicks the "Change Dictator" button in the toolbar and selects the recipient Dictator from the Dictator dropdown.

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

Total	# 186		-	-			3:17:07	-		
=	32205818	Vesey,	Philip	pvesey1-0	6132017-154533-7	'1.wav	0:01:03	Simp		
=	34761531	Reea,	Samua	sreed-030	12018-131230-1.ds	s	0:00:03			
≡	33737753	Hardin	ig, David	vidhard	ing1-09112018-08	2116.dss	0:00:04	Simps		
			Total	# 186	-	-			3:17:07	-
			≡	32205818	Miller, Gerald	geraldmiller1-	06132017-1	.54533-71.wav	0:01:03	Sim
			≡	34761531	Reed, Samual	sreed-0301201	18-131230-	1.dss	0:00:03	
			≡	33737753	Harding, David	davidharding1	-09112018	-082116.dss	0:00:04	Sim



4 Delete



This function allows the user to delete a dictation or transcription. "Delete" is a permission-based feature and can be provided by the Transcription Team Administrator. The default settings for Staff does not contain the "Delete" permission.

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

Columns

Columns and their meaning are given below:

Betty Warren Transcriber Inbox Folde	r										Fol			.340 <u>report bu</u> ports Logou
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All Facilities		DID	A	File Name	Facility	Uploaded	Dictated	Dictator	Pool	TAT	Length	Report Type	First	Last
		35502.501		iarnold-03032	Hampton Rad	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:06	XRAY	Alicia	Contt 1
filter	≡	35362492		jarnold-03032	Hampton Rad	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		2hr STAT	0:00:09		Bryce	Polanski (

Here are the column descriptions in details:

Actions: This column contains three icons:



Betty Warren Transcriber Inbox Folder							
省 🔁 📓 音 🍸 🔍 Search	n 🙈 (Change Dict	tator	🕐 Route 🗑 De	elete 🕜 🗇		
All Facilities		DID	2	File Name	Facility	Uploaded	
	≡	35362501		jarnold-03032	Hampto 1	03/03/20 15:34	0
filter	≡	35362492		jarnold-03032	Hampton Rad	03/2 20 16:34	0
My Documents	=	35362377		jarnold-03032	Hamp 👘	03/03/20 15:09	0
Inbox	≡	35362356		jarnold-03032	Hamp	03/03/20 15:07	0
Rejected	=	35362179		jarnold-03032	Hampton Rad	03/03/20 14:40	٢
QA All Documents	≡	35362130		jarnold-03032	Hampton Rad	03/03/20 14:29	0
J. Arnold	≡	35344679		jrenault-0115	Hampton Rad	02/26/20 17:29	0
 T. Bales J. Blackwell 	≡	35344678		jrenault-1008	Hampton Rad	02/26/20 17:29	0

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

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

<u>Comments</u>: 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.

1

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

<u>Dictator</u>: The Dictator is the dictating user or owner of the transcription.

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



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

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

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

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

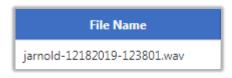
<u>eSigned</u>: This column displays if the transcription has been electronically signed by the Dictator.

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

<u>File Name</u>: The "Filename" column displays a unique identifier used by WebChartMD to identify the dictation or transcription. It is limited to use in 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.

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

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

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



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

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

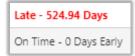
Location: For facilities using multiple locations.

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

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

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

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



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

<u>Original Transcriber</u>: The Transcriptionist' name that transcribed the initial document.

<u>Pool</u>: 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.

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

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

<u>Report Type</u>: This column displays the name assigned to the template in the Template Manager. Templates such as "OP Report" or "Letter" or H&P Eval" are common examples.

<u>Routed To</u>: This column displays the name of the transcriptionist or editor currently assigned a dictation or transcription. See page 72 for a full description of Routing.

<u>Status</u>: This column displays the status of the file. See page 69 in the Document Management section for a full description of all Statuses.

<u>TAT</u>: this column displays the turn-around time assigned to a dictation. See page 50 for a full description of dictation Priority & TAT setup.



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

Column Management

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

Rearranging

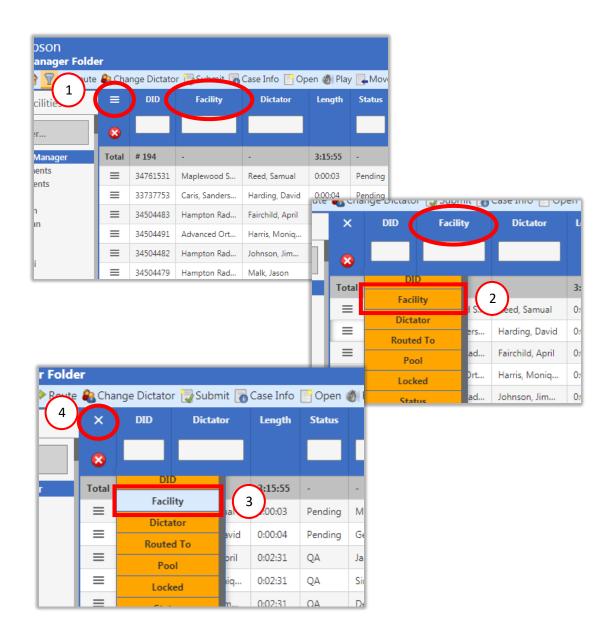
Columns can be dragged and dropped to a new location. To rearrange columns, hold down the leftclick button on the mouse while simultaneously dragging the column to its new location.

								<i>.</i>						
		Dictato	r 👿 Submit (Facility	Case Info 📑 Op Dictator	Length	First	last		elete (? Itus		, Report Typ			
									_					
	# 19	4		-	3:15:55	-	-	-						
	3476	51531	Maplewood S.	Reed, Samual	0:00:03	Mikhail	Bekarov	Pen	ding					
	3373	37753	Caris, Sanders	Harding, David	0:00:04	Gerald	Cooper	Pen	dina	0	FFICE NOTE			
	3450	04483	Hampton Rad	Fairchild, April	0:02:31	Jason	Bell	Ope	n 🐠	Play	/ 🔜 Move	→ Export	篃 Delete	
	3450	04491	Advanced Ort.	Harris, Moniq	0:02:31	Simson	Doug	, ,		_		1		1
	3450	04482	Hampton Rad	Johnson, Jim	0:02:31	Dennis	Banks		Leig		Fir.t atu:	Last	Status	
	3450	1470	Hampton Rad	Malk Jacon	0.02.31	Rath	Adame			ы				
							- 6							
							а	il	0:00:0	3	Mikhail	Bekarov	Pending	
	e Dictato	r ঝ	Submit 🗔 (Case Info 📑 On	en 🌒 Pla							Bekarov	Pending	
9	je Dictato DID		Submit 🐻 🤇 Facility	Case Info 📑 Op Dictator	en 🌒 Pla Length	y 🛃 Mov		port (Pending	
							e 🧼 Exp	port () Dele	ete (0 🗗		Pending	
							e 🧼 Exp	port () Dele	ete (2 🗇 Report		Pending	
#	DID	-		Dictator	Length	Status	e 🧼 Exp First	port (Dele Last	ete (2 🗇 Report		Pending	
#	DID # 194	- Мар	Facility	Dictator	Length 3:15:55	Status	e 🏕 Exp First	port (t	Dele Last	ete (2 🗇 Report	Тур	Pending	
#	DID # 194 34761531	- Map Caris	Facility	Dictator - Reed, Samual	Length 3:15:55 0:00:03	Status - Pending	e 🧼 Exp First	port (st iil ii	Dele Last	ete (Report -	Typ	Pending	
#	DID # 194 34761531 33737753	- Map Caris Ham	Facility lewood S s, Sanders	Dictator - Reed, Samual Harding, David	Length 3:15:55 0:00:03 0:00:04	Status - Pending Pending	e 🏕 Exp First - Mikhai Gerald	port (Dele Last	ete (Typ	Pending	

Show/Hide



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



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:

ranscriber Inbox Folder	•								Fo	lders Setting	s Reports
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All Facilities	≡	DID	Dictator	Length	Status	First	Las	TAT)	Report Type	Last Modifie
	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT			1
filter	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT		OFFICE NOTE	Simpson, Paul
My Documents		34393987	Shah, Ashish	0:01:02	QA	SYSTEM	BLANK	Standard			Bales, Zoey
Inbox	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT		SCH TEST	Bales, Zoey
Rejected QA	=	34504479	Malk, Jason	0:02:31	QA	Beth	Adams	Standard		CT SCAN	Simpson, Paul
All Documents	- E -	34504491	Harris, Moniq	0:02:31	QA	Simson	Doug	1hr STAT		OPERATIVE R	Bales, Zoey
 J. Arnold 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, Paul
 T. Burton A. Fairchild 	=	34504604	Harris, Moniq	0:02:21	QA	Nancy	Comstock	Standard		DISCHARGE S	Bales, Zoey

The TAT column header in ascending sort:

Betty Warren Transcriber Inbox Folder									Fo	bett ders Setting	yw 5.8.340 <u>r</u> s Reports
🚄 🔁 📓 🚔 ү 🔍 Searc	h 용 Chi	ange Dictato	or 🧼 Route 闠 D	elete 🕜	þ						1yr
All Facilities	≡	DID	Dictator	Length	Status	First	Last	TAT	>	Report Type	Last Modified
	≡	34504491	Harris, Moniq	0:02:31	QA	Simson	Doug	1hr STAT		OPERATIVE R	Bales, Zoey
filter	=	35003347	Arnold, Jimmy	0:00:12	Pending	Jeremy	Hobson	1hr STAT			,
My Documents	=	35022561	Bales, Lowen	0:00:02	QA	Allison	Smith	1hr STAT		А	Bales, Zoey
Inbox Rejected	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Bekarov	2hr STAT			
QA	=	33737753	Harding, David	0:00:04	Pending	Gerald	Cooper	2hr STAT		OFFICE NOTE	Simpson, Pat ^a
All Documents	=	34504483	Fairchild, April	0:02:31	QA	Jason	Bell	2hr STAT		SCH TEST	Bales, Zoey
J. Arnold T. Bales	≡	35068144	Miller, Gerald	0:00:12	Pending			2hr STAT			
J. Blackwell	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Banks	8hr STAT		XRAY	Bales, Zoey
T. BurtonA. Fairchild	≡	34504524	Harris, Moniq	0:01:08	QA	Victor	Agheboir	12hr STAT		CONSULT	Simpson, Pau



The TAT column header in descending sort:

ranscriber Inbox Folder 🗐 🔁 🗑 骨 🦞 🔍 Searc	Folders Settin	gs Repo								
All Facilities		DID	Dictator	Length	Status	First	Last	TAT	Report Type	Last Mo
	≡	35081472	Bales, Lowen	0:00:08	Pending		Bekarov	Standard		
filter	=	35072519	Bales, Lowen	0:00:36	QA	Ralph	Cooper	Standard	А	Bales, Zoey
My Documents	=	34504524	Harris, Moniq	0:01:08	QA	Victor	BLANK	12hr STAT	CONSULT	Simpson, P
Inbox Rejected	=	34504482	Johnson, Jim	0:02:31	QA	Dennis	Bell	8hr STAT	XRAY	Bales, Zoey
OA	=	35068144	Miller, Gerald	0:00:12	Pending		Adams	2hr STAT		
All Documents	=	34504483	Fairchild, April	0:02:31	QA	Jason	Doug	2hr STAT	SCH TEST	Bales, Zoey
 J. Arnold T. Bales 	=	33737753	Harding, David	0:00:04	Pending	Gerald	Banks	2hr STAT	OFFICE NOTE	Simpson, P
🦉 J. Blackwell	=	34761531	Reed, Samual	0:00:03	Pending	Mikhail	Agheboir	2hr STAT		
 T. Burton A. Fairchild 	=	35147151	Bales, Traci	00:00:00	QA	Allison	Comstock	1hr STAT	Blank Template	Bales, Zoey



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 69. For a detailed description of Row and Page Settings, see page 20.

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.

Betty Warren Transcriber Inbox Folder										
🔁 😂 🗑 👕 🧟 Search 🍓 Change Dictator 🧼 Route 資 Delete 📀 🗇										
All Facilities		DID	DID 📔 File		ime	Facility		Uploaded		
	≡	35362501		jarnold-0	3032	Hampton Rad		03/03/20 15:34		
filter	×	Flags					Rad	03/03/20 15:34		
My Documents	1	None	Red	Blue	Green	Yellow	Rad	03/03/20 15:09		
Inbox	≡	Copy DIDs to Clipboard Ra 2 03/03/20 15:07								
Rejected	~	Rad. 1 03/03/20								
QA	3	35362130	Copy Dictation 35362130 jarnold-03032 Ha				Rad	03/03/20 14:29		
All Documents		55502150		Jamoid-05052		Hampton Rad		03/03/20 14:23		
J. Arnold	≡	35344679	4679 jrenault-0115)115	Hampton Rad		02/26/20 17:29		
T. Bales J. Blackwell	≡	35344678		jrenault-1008		Hampton Rad		02/26/20 17:29		

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			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

3

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

≡	DID	Dictator	Ŀ	ength	Status	;	First	Last
8			ſ	Untitled - Not			_	
_				File	Edit Fo 1531	rmat	View	Help
Total	# 198	-	3:	3450	4482			
≡	34761531	Reed, Samual	0:	3450	4483 4491			
=	33737753	Harding, David	0:	3450	4524			
≡	34504483	Fairchild, April	0:					
=	34504479	Malk, Jason	0:					
≡	34504482	Johnson, Jim	0:					
≡	34504491	Harris, Moniq	0:					
≡	34504524	Harris, Moniq	0:					
=	34504604	Harris, Moniq	0:					
=	34504629	Harris, Moniq	0:					
=	34512978	Bales, Lowen	0(

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



Rejected

1

3

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.

Paula Simpson Transcriber Rejected Fold	-	Fo	psimpson 5.8.326 <u>report bug</u> Folders Settings Reports Logout 1yr 2yr All							
All Facilities		DID	Dictated Date	Uploaded Date ▼	Original Transcrit	ounter	DOV	DOB	Facility	Π
·	≡	34588265	06/21/19 13:52	06/21/19 13:56	Bales, Zoey		06/21/19	04/04/85	Hampton Rad	7
filter	≡	34588264	06/21/19 13:52	06/21/19 13:56	Bales, Zoey		06/20/19	04/04/85	Hampton Rad	
Workflow Manager	≡	34588275	06/21/19 13:51	06/21/19 13:54	Wallace, Connie				Hampton Rad	
My Documents	≡	34504521	05/23/19 15:33	05/23/19 15:36	Wallace, Connie			09/16/78	Hampton Rad	
Rejected	≡	34324047	03/27/19 14:46	03/27/19 14:46	Bales, Lo		03/27/19		Fidelity Insura	
	≡	34323232	03/27/19 12:39	03/27/19 12:39	Bales, Li 3		03/27/19		Fidelity Insura	
All Documents	=	34318705	03/26/19 11:39	03/26/19 11:39	Bales, Lowen		03/26/19		Fidelity Insura	
M. Abbott S. Abraham	≡	34318704	03/26/19 11:39	03/26/19 11:39	Bales, Lowen		03/26/19		Fidelity Insura	l.

The Rejected folder consists of three important areas:

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

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

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



Folder Management Functions

The first five icons from the left are consistent in all folders and more information on them can be found on page 15. The next five icons are explained in detail below:

Betty Warren Transcriber Rejected	l Folder	2	4	l.			
🔁 🗃 🖶 🍸 🍳	Search 🔯	Submit 🧼 I	Route 🐻 Case Ir	nfo 闠 Delete 🌘	0 🖓		
All Facilities		DID	3 ictated	Up 5	First	Last	ID #
		34588265	00/21/19 13:52	06/21/11 13:56	Maddy	Lundgrens	100112
filter	≡	34588264	06/21/19 13:52	06/21/19 13:56	Maddy	Lundgrens	100112
My Documents	=	34588275	06/21/19 13:51	06/21/19 13:54	Joan	Miller	383755
Inbox	=	34504521	05/23/19 15:33	05/23/19 15:36	Floyd	Abernathy, Jr.	000198383
Rejected QA	=	34504482	05/23/19 15:30	05/23/19 15:35	Dennis	Banks	02876667
All Documents	=	34393987	04/18/19 15:12	04/18/19 15:15	SYSTEM	BLANK	SYS-BLANK
J. Arnold	=	34290097	03/15/19 18:01	03/15/19 18:01	Ryan	Gise	BBA-151
 T. Bales J. Blackwell 	≡	33588796	08/07/18 05:33	08/07/18 05:37	Jane	Doe	^CMFSLDJS^

Search: A detailed description of Search is found on page 23.

Submit

1

2

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



The Route function allows the Transcription Team admins to manually route a dictation to a specific user. More details on Routing can be found on page 72.



anscriber Rejected F							Fol	ders Set	ttings Report	s Logoi
<mark>ခ</mark> 🔁 📓 音 🍸 🔍 Sei	arch ৗ	Submit 🥟	Rout	e 🐻 Case Info 🎁 Delete 👔 🗇					1у	/r 2yr <mark>/</mark>
All Facilities	Cha	ange File	Rou	ting						
filter		Rout	ting	T						
My Documents		Change		Return to default routing Barbara Johnston (0:02:45)						
Rejected	=	DID		Connie Miller (0:18:07)	ID #	Encounter	Visit Date	DOB	Facility	Dicta
QA	=	34588265	06,	Connie Wallace (0:09:50) Darlene Simpson (00:00:00)	0112		06/21/19	04/04/85	Hampton Rad	Arnold, J
All Documents	=	34588264	06,	Dolores Feeny (0:00:03)	0112		06/20/19	04/04/85	Hampton Rad	Arnold, J
J. Arnold T. Bales	=	34588275	06	Editor Review (00:00:00)	3755				Hampton Rad	Arnold, J
J. Blackwell	=	34504521	05	Facility Review (00:00:00)	0198383			09/16/78	Hampton Rad	Woodan
T. Burton	=	34504482	05	Faith Hansen (00:00:00) Gerry Miles (0:00:25)	876667		05/16/19		Hampton Rad	Johnson
A. Fairchild M. Harris	=	34393987	04	Gina Davis (0:03:21)	S-BLANK		05/14/19		Advanced Ort	Shah, As
J. Johnson	=	34290097	03	Gloria LaForce (00:00:00)	A-151		11/20/19	02/03/00	Hampton Rad	Arnold, J
J. Malk C. Martin	=	33588796	08,	Jasmine Brown (00:00:00) Joanne Lee (0:11:39)	MFSLDJS^		08/07/18	10/10/00	Hampton Rad	Fairchild
D. McLaughlin	=	33415907	06	Jordan Connelly (0:03:12)					Hampton Rad	Arnold, J
I. Mehta G. Miller	≡	33415897	06,	Margarie Coombs (00:00:00)					Hampton Rad	Arnold, J

4 Case Info

🗧 🔁 📓 音 🍸 🔍 Sea	ch 🕎	Submit 🥟 I	loute 🕜 Case Ir	nfo 🕤 Delete 🌘							1)	r 2yr 🦊
All Facilities	Cas	e Info										
		Search Pati	ent					Visit Date	06/21/2019			
filter		F	irst Maddy					Last	Lundgrens			
My Documents		D	ов 04/04/19	85				ID #	100112			1
Inbox		Report T	/pe			•		Note				Ĩ
Rejected	_	Billing Co	de					Location	Southside		•	1
QA												
All Documents	l	Jpdate Ca	se Clos	e								
											1	
T. Bales		DID	Distant	University and	El	Land	ID #	Ennor	ton Minit Data	DOP	En al Real	Dista
J. Blackwell	=	DID	Dictated	Uploaded ▼	First	Last	ID #	Encoun	ter Visit Date	DOB	Facility	Dicta
J. Blackwell T. Burton	=	DID 34588265	Dictated 06/21/19 13:52	Uploaded ▼ 06/21/19 13:56	First Maddy	Last Lundgrens	ID # 100112	Encoun	ter Visit Date	DOB 04/04/85	Facility Hampton Rad	
J. Blackwell T. Burton A. Fairchild	_							Encoun			,	Arnold, Ji
J. Blackwell T. Burton	=	34588265	06/21/19 13:52	06/21/19 13:56	Maddy	Lundgrens	100112	Encoun	06/21/19	04/04/85	Hampton Rad	Arnold, J Arnold, J
J. Blackwell T. Burton A. Fairchild M. Harris J. Johnson J. Malk	=	34588265 34588264	06/21/19 13:52 06/21/19 13:52	06/21/19 13:56 06/21/19 13:56	Maddy Maddy	Lundgrens Lundgrens	100112 100112	Encoun	06/21/19	04/04/85	Hampton Rad Hampton Rad	Dicta Arnold, Ji Arnold, Ji Arnold, Ji
J. Blackwell T. Burton A. Fairchild M. Harris J. Johnson	=	34588265 34588264 34588275	06/21/19 13:52 06/21/19 13:52 06/21/19 13:51	06/21/19 13:56 06/21/19 13:56 06/21/19 13:54	Maddy Maddy Joan	Lundgrens Lundgrens Miller	100112 100112 383755	Encoun	06/21/19	04/04/85	Hampton Rad Hampton Rad Hampton Rad	Arnold, Ji Arnold, Ji Arnold, Ji

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.



Delete: A detailed description of Delete is found on page 26.

Columns

All available columns viewable in the My Documents Rejected and their descriptions can be found starting on page 26.

Columns unique to the My Documents Rejected are:

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

Column Management

See page 30 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 69. For a detailed description of Row and Page Settings, see page 20.



File Action Menu

All available "File Action Menu" options viewable in the My Documents Rejected and their descriptions can be found starting on page 34.



QA

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

Paula Simpson QA Folder										26 <u>report bug</u> rts Logout
🗐 🔁 🗑 骨 🍸 🔍 Sear	1	bmit 🙈	Chan	ige Dictator 🧼 I	Route 🐻 Case Ir	nfo 📑 Open 🚞	CCs 闠 De	lete 🗿 🗇	:	1yr 2yr <mark>All</mark>
All Facilities	Т	DID	A	Dictator	Dictated Date	Uploaded Date	TAT	Routed To	Pool	Routed
		34504483		Fairchild, April	05/23/19 15:30	05/23/19 15:35		Wallace, Con		05/23/19 15
filter	≡	34504491		Harris, Moniq	05/23/19 15:30	05/23/19 15:35		Wallace, Con		05/23/19 15
Workflow Manager	≡	34504479		Malk, Jason	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con		05/23/19 15
My Documents Inbox	≡	34504482		Johnson, Jim	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con		05/23/19 15
Rejected	≡	34504524		Harris, Moniq	05/23/19 15:34	05/23/19 15:37	Standard	Wallace, Con		05/23/19 15
 QA	≡	34504604		Harris, Moniq	05/23/19 15:40	05/23/19 15:44	Standard	Wallace, Con		05/23/19 15
All Documents	≡	34504629		Harris, Moniq	05/23/19 15:44	05/23/	Standard	Wallace, Con		05/23/19 15
M. Abbott S. Abraham	≡	34512978		Bales, Lowen	05/28/19 14:33	05/28/1	Standard	Simpson, Paula		05/28/19 14
S. Ackerman	=	34528400		Bales, Lowen	06/03/19 08:47	06/03/19 08:47	Standard	Simpson, Paula		06/03/19 08

The QA folder consists of three important areas:

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

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



1

2

Files: The central section of the Portal displays the files.



Folder Management Functions

Paula Simpson QA Folder		2		4	1	6	8		simpson 5.8.3 ttings Repo	
🗐 🕄 📓 骨 🍸 🔍 Sea	arch 湿	Submit 🙈	Char	nge Dictator 🧼 I	Route 🐻 Case Ii	nfo 📑 Open 🚞	CCs 闠 De	lete 🕜 🗇		1yr 2yr Al
All Facilities		DID	1	ictator	Dictater	Uploaded D	TAT	Routed To	Pool	Routed
		34504483	λ	3	05/23/1. 5	05/23/19 15:	STAT	Wallace, Con		05/23/19 15
filter	=	34504491		Harris, Moniq	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con		05/23/19 15
💼 Workflow Manager	=	34504479		Malk, Jason	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con		05/23/19 15
My Documents	=	34504482		Johnson, Jim	05/23/19 15:30	05/23/19 15:35	Standard	Wallace, Con		05/23/19 15
Rejected	=	34504524		Harris, Moniq	05/23/19 15:34	05/23/19 15:37	Standard	Wallace, Con		05/23/19 15
QA		34504604		Harris, Moniq	05/23/19 15:40	05/23/19 15:44	Standard	Wallace, Con		05/23/19 15
All Documents	=	34504629		Harris, Moniq	05/23/19 15:44	05/23/19 15:47	Standard	Wallace, Con		05/23/19 15

The first five icons from the left are consistent in all folders and more information on them can be found on page 15. The next eight icons are explained in detail below:

Search: A detailed description of Search is found on page 23.

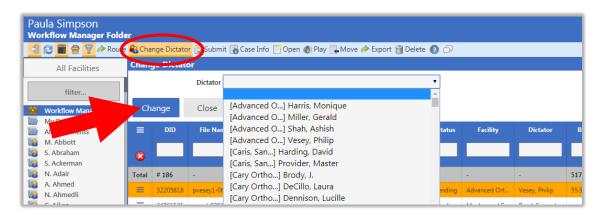


1

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



Change Dictator



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

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

≡	DID	Dic	tator		File Name		Length	Last			
8											
Total	# 186			-			3:17:07	-			
≡	32205818	Vesey,	Philip	pvesey1-0	6132017-154533-7	1.wav	0:01:03	Simp			
=	34761531	Reea, S	amula	sreed-030	12018-131230-1.ds	5	0:00:03	,			_
≡	33737753	Harding	≡	DID	Dictator		File Nam	le		Length	Las
			8								
			Total	# 186		-				3:17:07	-
			≡	32205818	Miller, Gerald	geraldmiller1-	06132017-1	54533-71	.wav	0:01:03	Sim
			≡	34761531	Reed, Samual	sreed-0301201	8-131230-1	l.dss		0:00:03	
			≡	33737753	Harding, David	davidharding1	-09112018-	082116.ds	55	0:00:04	Sim

4

Route

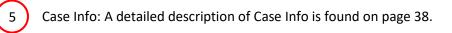
Paula Simpson Workflow Manager Fol	der							
🗐 🔁 🗃 音 🌈 🔗 Rou	te 🜒 Cha	nge Dictato	r 🕎 Submit	t 🐻 Case Info 📑 Open 🜒 Play 🔜 Move 🧼 Export 資 Delete 🧯	0			
All Facilities	Chan	ge File Ro	outing					
filter			Routing					
Workflow Manager	Ch	ange	Close	Return to default routing Barbara Johnston (0:02:45)				
All Documents M. Abbott S. Abraham	=	DID	File Nan	Connie Miller (0:03:15) Connie Wallace (0:24:00) Darlene Simpson (0:00:12)	tatus	Facility	Dictator	Bill (L
S. Ackerman N. Adair	Total	# 186		Dolores Feeny (0:00:03) Editor Review (00:00:00)				517.34
A. Ahmed N. Ahmedli	=	32205818	pvesey1-06	Faith Hansen (00:00:00) Gerry Miles (00:00:00)	ending	Advanced Ort	Vesey, Philip	55.98
C. Aiken A. Albers	=	34761531	sreed-0301	Gina Davis (0:00:20)	ending	Maplewood S	Reed, Samual	-
K Alfaro	=	33737753	davidhardii	Gloria LaForce (00:00:00)	ending	Caris, Sanders	Harding, David	1.43

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

More details on Routing can be found on page 72.





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

Documents can be opened individually or in batches.

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

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

Paula Simpson Inbox Folder											
🚄 🔁 📓 音 🍸 🔍 Sear	ch 📑	Open 昌 Pri	nt [Fina	alize	0	Rejeo	t 🚷 Change Dict	ator 🔚 Fax 🐻 Ca	ase Info 🍟 Delete	e 🕐 🗭
All Facilities	• =	DID	6	-	2	٢	2	Facility	Note	Dictator	Dictated Date
		34588166						Advanced Orth		Miller, Gerald	06/21/19 14:07
filter		34504486	٠					Hampton Radi		Arnold, Jimmy	05/23/19 15:33
💼 Workflow Manager	=	34504489	0					Hampton Radi		Arnold, Jimmy	05/23/19 15:30
My Documents	=	34393987	0					Advanced Orth		Shah, Ashish	04/18/19 15:12
Notes	=	34290097	0					Hampton Radi		Arnold, Jimmy	03/15/19 18:01
Pending	=	34215312	0					Hampton Radi		Fairchild, April	02/25/19 10:11
Inbox	=	33737755						Maplewood Su	Note	Reed, Samual	09/11/18 09:23
Rejected	=	33737752						Caris, Sanders	Here's a note	Harding, David	09/11/18 09:18
Final		33499492	•					Maplewood Su		Reed, Samual	03/01/18 14:12
C Abraham	=	22/100/100						Manlewood Su		Read Samual	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										
省 🔁 📓 🚔 🍸 🔍 Sea	rch 📄	Open 昌 Pri	nt [Finali	ze 🚫	Rejeo	t 용 Change Dict	ator 🧱 Fax 🐻 C	ase Info 🗑 Delete	0 🗇
All Facilities	• ≡	DID	6	-	2 🕻	1	Facility	Note	Dictator	Dictated Date
		34588166					Advanced Orth		Miller, Gerald	06/21/19 14:07
filter	=	34504486	۰				Hampton Radi		Arnold, Jimmy	05/23/19 15:33
Workflow Manager	=	34504489	\bigcirc				Hampton Radi		Arnold, Jimmy	05/23/19 15:30
My Documents	=	34393987	۰				Advanced Orth		Shah, Ashish	04/18/19 15:12
Notes	=	34290097	0				Hampton Radi		Arnold, Jimmy	03/15/19 18:01
Pending	=	34215312	•				Hampton Radi		Fairchild, April	02/25/19 10:11
Inbox		33737755					Maplewood Su	Note	Reed, Samual	09/11/18 09:23
Rejected	=	33737752					Caris, Sanders	Here's a note	Harding, David	09/11/18 09:18
Final M. Abbott	=	33499492	0				Maplewood Su		Reed, Samual	03/01/18 14:12
 M. Abbott S. Abraham 		33499490					Maplewood Su		Reed, Samual	03/20/18 11:26



CCs Management

Paula Simpson QA Folder				F		simpson 5.8.320 ttings Report	
🗐 🗃 🖶 🍸 🔍 Sea	arch [Submit 🚑 Ch	ange Dictator 🧼 R	oute 🐻 Case In	fo 📑 Open 🔚	CCs 😭 Dele	ete 🕜 🗖 🛛 1	yr 2yr Al
All Facilities							Pool
	34393987	Shah, Ashish	04/18/19 15:12	04/18/19 15:15	1hr STAT		
filter						llace, Con	
worknow Manager	Manage CC's f	or 34504479				llace, Con	
My Documents	Address Book Name	Address Book Fax	Contact Name	Contact Fax	Remove CC	llace, Con	
Inbox Rejected	ABADEER, PETER S DO	(309) 661-3394	Joe Smith, MD	(123) 456-8520	ii /	llace, Con	
QA (2)	John S Cullen, MD	(907) 835-5162	James Smith	(907) 835-5162	1	3 Jace, Con	
Draft	John S Cullen, MD	(907) 835-5162	James Smith	(907) 835-5162	Ĩ	llace, Con	
All Documents	Add CC					llace. Con	
J. Arnold						ipson, Paula	
S. Demo Provi		Search A	Address Book			ipson, Paula	
L. Direnfeld						ny, Dolores	
J. Drood A. Fairchild	Close					ing, bolores	
M. Harris							QA to Monit
J. Johnson	51077105	AITISIO, 2011013	00,22,20 20,02	00,22,25,20,20,00	210 0171		QA to Monit
J. Malk	34877476	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	1hr STAT	Simpson, Paula	



1

3

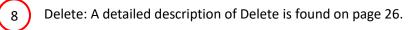
Selecting a File and clicking the "CCs" function button will create a popup that allows editing of CC recipients. For example, typing "Smith" displays a list of all users in the Address Book for the user to select. The list has a scroll

≡ 3450)4491	Harris, Moniq	05/23/19 15:30	05/23/19 15:35	1hr STAT
Manage (CC's f	or 34504479			
Address Bool	k Name	Address Book Fax	Contact Name	Contact Fax	Remove CC
ABADEER, PETE	ER S DO	(309) 661-3394	Joe Smith, MD	(123) 456-8520	1
John S Cullen, I	MD	(907) 835-5162	James Smith	(907) 835-5162	1
John S Cullen, I	MD	(907) 835-5162	James Smith	(907) 835-5162	1
Add CC					
		5	smith		
Add CC F	reemar	Internal Medicine	- (201) 555-121	12	
Add CC	Gerald S	mith, MD @ Freem	nan Internal Me	dicine - (757) 5	51-2122
Add CC N 1212	Manfred	E. Smith, MD @ Fi	reeman Internal	Medicine - (20)1) 555-
Add CC S	mithers	Associates - (888)	555-1212		
Add CC F	rank Sr	nithers, MD @ Smi	thers Associates	s - 1-423-432-9	9221
Add CC A	ABADEE	R, PETER S DO - (3	09) 661-3394		
Add CC J	oe Smit	h, MD @ ABADEEF	R, PETER S DO -	(123) 456-8520	D
Adderson	obn Sm	ith MD.@, ABADE	EQURETER S.DO	.(309).661.33	

2 New CC recipients are added by entering the full or partial first or last name into the "Add CC" field and clicking on the desired search result to select it. Selected items appear in table at the top of the box.

Deleting CC recipients is done by clicking the trash can icon to the right of the recipient to be deleted in the "Remove CC" column.

Clicking the Close button closes the Manage CC window.





Columns

All available columns viewable in the My Documents QA and their descriptions can be found starting on page 26.

Columns unique to the My Documents Inbox are:

<u>Routed</u>: This column displays the time and date when the dictation was routed to the user.

Column Management

See page 30 for a full description of column management features.

File Display

This section displays the transcriptions that are yet to be delivered to the Dictator. All visible dictations in this folder are of the QA status. For a detailed description of available file statuses and their meaning, see page 69. For a detailed description of Row and Page Settings, see page 20.

File Action Menu

All available "File Action Menu" options viewable in the My Documents QA and their descriptions can be found starting on page 34.

File Action new to the QA folder:

Betty Warren QA Folder								
🗐 🔁 📓 音 💡 🔍 Sear	ch 🍞	Submit 용	Change Dictator	🕐 Route 🐻 Ca	ase Info 📑 Op	pen	🚍 CCs 🍟 Delet	te 🕜 🗇
All Facilities	≡	DID	Dictated	Uploaded V	Pool	2	Routed	Finished
	=	35017854	11/11/19 15:48	11/11/19 15:48	General Pool		11/11/19 15:48	11/11/19 15:48
filter	×		Flags				06/21/19 14:12	12/19/19 14:2
My Documents		None	Red Blue	Green Yellow			12/19/19 14:22	12/20/19 13:1
Inbox	≡		Copy DIDs to Clip	board			06/21/19 14:11	04/23/20 14:3
Rejected	=		Copy Dictatio				06/21/19 14:11	04/28/20 11:5
QA All Documents	1)		Unlock				06/21/19 14:11	04/23/20 14:3
J. Arnold		34588162	06/21/19 14:07	06/21/19 14:10			06/21/19 14:11	12/19/19 14:1
 T. Bales J. Blackwell 	=	34588169	06/21/19 14:07	06/21/19 14:10			06/21/19 14:11	12/19/19 14:1
T. Burton	=	34588150	06/21/19 14:05	06/21/19 14:09			06/21/19 14:09	12/06/19 10:3

1 Unlock:

At first instance of a transcription being opened by a user in their Portal, the system treats that document as the current authoritative copy until closed and locks it from opening a second copy.



This is to prevent simultaneous editing of documents by another user while an authoritative copy is open. The unlock feature overrides the lock and allows a locked document to be unlocked for editing by another user.



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						
🔁 🔁 📓 音 🦞 🔍 Search	n 🕙 (Change TAT	🔒 Change Dict	tator 🐻 Case Inf	fo 闠 Delete 🔞	9
All Facilities	≡	DID	Dictator	Uploaded 🔻	Dictated	Fi
	≡	35362501	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarn
filter	≡	35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarni
My Documents	≡	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09	jarn
All Documents	≡	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarne
Pending Inbox	=	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarne
Rejected	≡	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29	jarno
Final	=	35344679	Renault, James	02/26/20 17:29	01/15/18 19:38	jreni
J. Arnold	=	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jreni
T. Bales J. Blackwell	=	35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarne
🔞 T. Burton	=	35343500	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:00	jarne

<u>Pending</u>: This contains the dictations waiting to be transcribed.

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

<u>Rejected</u>: This contains transcriptions that have been returned by the Dictator for rework.

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



Pending

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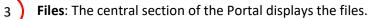
The All Documents Pending folder is a slightly different view than the My Documents Inbox, although at first glance they would appear to contain the same content. This Pending folder gives the Transcription Team a view of how the Facility users see files that have not yet been delivered. In other words, 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.

Betty Warren Pending Folder	1							Folders		. 8.340 <u>report bug</u> eports Logou
🔄 🔁 🗑 骨 🍸 🔍 Sea	-	hange TAT	' 🙈 Change Dic	tator 🐻 Case Inf	fo 闠 Delete 🔞					1yr 2yr Al
All Facilities	=	DID	Dictator	Uploaded 🔻	Dictated	File	Length	TAT	Report Type	ID #
	Ξ	35362501	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnolo Z	0:00:06	2hr STAT	XRAY	1001
filter	≡	35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032	0:00:09	2hr STAT		01099
My Documents	=	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09	jarnold-03032	0:00:07	2hr STAT		01779
Pending	≡	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarnold-03032	0:00:16	2hr STAT		
Inbox	=	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032	0:00:48	2hr STAT		01099
Rejected	=	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:2	1-03032	0:00:23	2hr STAT		
Final	=	35344679	Renault, James	02/26/20 17:29	01/15/18 19:3	3 t-0115	0:00:07	Standard		
J. Arnold	=	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jrenault-1008	0:00:10	Standard		
T. Bales	=	35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarnold-02262	0:00:02	2hr STAT		
T. Burton	=	35343500	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:00	jarnold-02262	0:00:11	2hr STAT		
A. Fairchild M. Harris	Ξ	35343495	Arnold, Jimmy	02/26/20 14:03	02/26/20 14:00	jarnold-02262	0:00:04	2hr STAT		

The Pending folder consists of three important areas:

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

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





Folder Management Functions

Betty Warren Pending Folder	(2		4	I			Folders		. 8.340 <u>report bug</u> eports Logout
🚽 🔁 🗃 🚔 🍸 🔍 Searc	h 🕙	Change TAT	🚷 Change Dict	ator 🐻 Case Inf	fo 闠 Delete 🔞	P				1yr 2yr All
All Facilities	≡	DID	Dir	Uploaded 🔻	\square	File Name	Length	TAT	Report Type	ID #
1	≡	35362501	Arnol 3	03/03/20 15:34	₀₃ , 5 ,4	jarnold-03032	0:00:06	2hr STAT	XRAY	1001
filter	≡	35362492	Arnold, Jimmy	03/03/20 15:34	03/03/20 15:34	jarnold-03032	0:00:09	2hr STAT		01099
My Documents	=	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20 15:09	jarnold-03032	0:00:07	2hr STAT		01779
All Documents	≡	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20 15:07	jarnold-03032	0:00:16	2hr STAT		
Pending	=	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20 14:40	jarnold-03032	0:00:48	2hr STAT		01099
Rejected	≡	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20 14:29	jarnold-03032	0:00:23	2hr STAT		
Final	=	35344679	Renault, James	02/26/20 17:29	01/15/18 19:38	jrenault-0115	0:00:07	Standard		
J. Arnold	=	35344678	Renault, James	02/26/20 17:29	10/08/19 10:07	jrenault-1008	0:00:10	Standard		
T. Bales	=	35343501	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:01	jarnold-02262	0:00:02	2hr STAT		
T. Burton	=	35343500	Arnold, Jimmy	02/26/20 14:04	02/26/20 14:00	jarnold-02262	0:00:11	2hr STAT		
A. Fairchild M. Harris	Ξ	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 15. The next five icons are explained in detail below:

Search: A detailed description of Search is found on page 23.

2

1

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

Betty Warren Pending Folder									Folders	bettyw Settings	5.8.340 <u>r</u> Reports	
🚄 🔁 📓 쓸 ү 🔍 Seard	ch 🕑	Change TAT	🙈 Change Dict	ator 🐻 Case Inf	fo 🎁 Dele	ete 👔	þ 🔁				1yr	2yr All
All Facilities	Cha	nge File 1	TAT									
filter	1	TA	Г		•							
My Documents		Change	Standard 1hr STAT									
Pending	=	DID	2hr STAT			ed	File Name	Length	TAT	Report Type	. 10)#
Inbox	=	35362501	4hr STAT 8hr STAT			15:34	jarnold-03032	0:00:06	2hr STAT	XRAY	1001	
Rejected	=	35362492	12hr STAT			15:34	jarnold-03032	0:00:09	2hr STAT		01099	
Final	=	35362377	Arnold, Jimmy	03/03/20 15:09	03/03/20	15:09	jarnold-03032	0:00:07	2hr STAT		01779	
 J. Arnold T. Bales 	=	35362356	Arnold, Jimmy	03/03/20 15:07	03/03/20	15:07	jarnold-03032	0:00:16	2hr STAT			
J. Blackwell	=	35362179	Arnold, Jimmy	03/03/20 14:40	03/03/20	14:40	jarnold-03032	0:00:48	2hr STAT		01099	
T. Burton A. Fairchild	=	35362130	Arnold, Jimmy	03/03/20 14:29	03/03/20	14:29	jarnold-03032	0:00:23	2hr STAT			
M. Harris	=	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".



Change Dictator: A detailed description of Search is found on page 23.



Case Info: A detailed description of Case Info is found on page 38.

5 Delete: A detailed description of Delete is found on page 26.

Columns

All available columns viewable in the All Documents Pending and their descriptions can be found starting on page 26.

Column Management

See page 30 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 69. For a detailed description of Row and Page Settings, see page 20.

File Action Menu

All available "File Action Menu" options viewable in the All Documents Pending and their descriptions can be found starting on page 34.



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.

🚄 🔁 📓 쓸 🦻 🔍 Search	1 🖻 🕻)nen 🚐 Pi	rint 🚫 Reject 🙈 Ch	ange Dictator 🖀	Fax 🗖 Case Inf	o 🗎 Delete 🙆	6	$\left(2 \right)$	1yr 2	.og
All Facilities		DID		-	Dictator	Dictated	Uploaded	Finished	First	y ı
	Ξ	34877483		Hampton Rad	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:57	Dennis	
filter	≡	34588085		Hampton Rad	Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:57	Simi	
My Documents	≡	34877479		Hampton Rad	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:56	Betty	
All Documents	=	34588279		Hampton Rad	Renault, James	06/21/19 13:51	06/21/19 13:54	04/28/20 11:34	SYSTEM	
Pending	=	35183602		Hampton Rad	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:34	SYSTEM	
Rejected	≡	34588116	•	Hampton Rad	Arnold, Jimmy	19 13:55	06/21/19 13:59	04/06/20 10:53	Zebe	
Final	≡	34588179		Hampton Rad	Bales, Traci	3 9 14:05	06/21/19 14:09	12/06/19 10:36	Alice	
J. Arnold	≡	34588166		Advanced Ort	Miller, Gerald	06/21/19 14:07	06/21/19 14:10	11/06/19 13:22	Shari	
 T. Bales J. Blackwell 	=	34504483	•	Hampton Rad	Fairchild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:10	Jason	
T. Burton	≡	34393968	•	Advanced Ort	Shah, Ashish	04/18/19 15:15	04/18/19 15:18	05/14/19 09:38	SYSTEM	
 A. Fairchild M. Harris 	=	34215312	•	Hampton Rad	Fairchild, April	02/25/19 10:11	02/25/19 10:15	03/13/19 14:44	Marcia	

The Inbox folder consists of three important areas:

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

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



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Files: The central section of the Portal displays the files.



Folder Management Functions

	ty Warren ox Folder		2	4		e e	5	8	Folders		5.8.340 <u>rep</u> Reports L	
4	😂 📓 쓸 🍸 🔍 Searc	h 📑 (Open 昌 Pr	int 🚫 Reject	🙈 Cha	ange Dictator 🧮	Fax 🐻 Case Info	o 簤 Delete 👔	P		1yr 2	yr All
	All Facilitie	≡	DV a			cility	Dir	Dictated	Uploaded	Finished V	First	
		=	3487 3			5 ton Rad	Arnold,	06/21/19 13:52	06/21/19 13:56	04/28/20 11:57	Dennis	Arar
	filter	=	34588085			Hampton Rad	Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:57	Simi	Abra
	My Documents	=	34877479			Hampton Rad	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:56	Betty	Smi
	All Documents	=	34588279			Hampton Rad	Renault, James	06/21/19 13:51	06/21/19 13:54	04/28/20 11:34	SYSTEM	BLA
	Pending Inbox	=	35183602			Hampton Rad	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:34	SYSTEM	BLA
	Rejected	=	34588116	•		Hampton Rad	Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	04/06/20 10:53	Zebe	Аро
	Final	=	34588179			Hampton Rad	Bales, Traci	06/21/19 14:05	06/21/19 14:09	12/06/19 10:36	Alice	Smir
	J. Arnold	=	34588166			Advanced Ort	Miller, Gerald	06/21/19 14:07	06/21/19 14:10	11/06/19 13:22	Shari	Den
	T. Bales J. Blackwell	≡	34504483			Hampton Rad	Fairchild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:10	Jason	Bell

The first five icons from the left are consistent in all folders and more information on them can be found on page 15. The next eight icons are explained in detail below:

- Search: A detailed description of Search is found on page 23.
- Open: A detailed description of Open is found on page 44.
- Print: This function prints the transcribed document into the default printer for the computer.
- Reject: This function rejects the transcription and sends it to the Rejected folder. Details of Rejected folder can be found on page 36.
 - Change Dictator: A detailed description of Change Dictator is found on page 25.
- 6 Fax

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Transcriptions can be faxed directly from the Portal, via either an automatic setting or manually. Automatic faxing is not available to Staff, please speak with your Administrator for details.

To manually fax transcription(s) from the portal:

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

This window is divided into two sections:

- Search for Fax Recipient
- Add New Fax Recipient

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



Search on Fax Recipient

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

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

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

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

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

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

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

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

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

Notes on adding fax recipients:

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

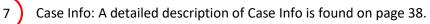


Send Fax				
Search to loca	ate fax recipie	nt(s)		
name or fax	number	Search		
Select fax rec	ipient(s)			
Office Name	Contact Name	Location	Fax	
John Kramer			(124) 509-9227	
include co	ver sheet			
Add new fax	recipient(s)			
John Krame	r i	124-509-9	227	Add
save to add	dress book			
Close	Send Fax			

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

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

- 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.





8 Delete: A detailed description of Delete is found on page 26.

Columns

All available columns viewable in the All Documents Inbox and their descriptions can be found starting on page 26.

Columns unique to the All Documents Inbox are:

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

Column Management

See page 30 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 69. For a detailed description of Row and Page Settings, see page 20.

File Action Menu

nbox Folder	unin 🗔	0aaa 🗖 D	int (0.0			Cha	n na Dista		- Cons Inf	- Oslata 🔿	Folders	Settings
All Facilities		DID		<u> </u>	ejec 2	_		nge Dicta Facili		Fax 🐻 Case Info	Delete Dictated	Uploaded	Finished V
All Facilities		34877483						Hampton	·	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:5
filter		34588085						Hampton		Arnold, Jimmy	06/21/19 13:50	06/21/19 13:54	04/28/20 11:5
My Documents	×	Flags ta							Rad	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	04/28/20 11:5
All Documents		None	Red		Blue	G	ireen	Yellow	Rad	Renault, James	06/21/19 13:51	06/21/19 13:54	04/28/20 11:3
Pending			_			or: 1			Rad	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:3
Inbox Rejected			Сору						Rad	Arnold, Jimmy	06/21/19 13:55	06/21/19 13:59	04/06/20 10:5
Final					/ Dict				Rad	Bales, Traci	06/21/19 14:05	06/21/19 14:09	12/06/19 10:3
🔒 J. Arnold									DI	2 er, Gerald	06/21/19 14:07	06/21/19 14:10	11/06/19 13:2
 T. Bales J. Blackwell 	3	Download Mark as Printed							Rad	archild, April	05/23/19 15:30	05/23/19 15:35	05/23/19 17:1
T. Burton	3	34393968		viark	as Pi	rinteo	2	Advanced	Ort	Shah, Ashish	04/18/19 15:15	04/18/19 15:18	05/14/19 09:3
A. Fairchild	T	34215312	0					Hampton	Rad	Fairchild, April	02/25/19 10:11	02/25/19 10:15	03/13/19 14:4



All available "File Action Menu" options viewable in the My Documents QA and their descriptions can be found starting on page 34.

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.

Pa we			bug but
4		ADVANCED ORTHOPAEDIC & SPINE · 2020 COMPTON PLACE · WEST MEMPHIS TN 39812 · (380) 747-1980	
		OPERATIVE REPORT	
		Simson Delaney 1293836 02/14/1980	
		PREOPERATIVE DIAGNOSES: Patient was complaining yesterday of swelling of the tongue.	
		It looked like he may have been having some mild to moderate oral or throat-related dystonia with the increase in Geodon. We did decrease the dose, at least that time. He still got 80 mg at bedtime yesterday.	
		He did request his medications being associated with dinner. I did change the order, for the final order to	g E .
		be 40 mg p.o. q.a.m. and 80 mg p.o. each evening with dinner, to help associate absorption, per patient request. Patient appears to be less manic. He appears to be sleeping. He is not as initiated and agitated. He is not out as a preseventive, hypervenda, or initizative. He is compilant with medications currently.	e, (
		He appears to be improving.	ie, (
		POSTOPERATIVE DIAGNOSES:	e, (
		PROCEDURE: Appearance: Groomed. Good eye contact. Behavior is calm, cooperative. Mood: "Im okay," Affect: Mildly constructed to euthymic. Speech: Regular rate and rhythm. Thought processes are clear, logical, goal directed. Associations are intact. Denies suicidal or homicidal ideation. Patient	
		denies auditory hallucinations when asked, but at times does appear to be mildly manic/hypomanic, at	e, (
		least in his content - grandiosity, religiosity, that sort of thing. Oriented to time, place, person, and situation. Attention and Concentration: Normal. Memory: Recent and remote appear intact, per	e, (
		interview. Language/Information/Intelligence Level: Appear average. Judgment and Insight: Fair. ANE STHE SIA: Blood pressures was 129/69, pulse 125, respirations 18, 98.5 tympanic temperature.	e, (
		Gait and station appear normal and no evidence currently of abnormal movements.	on,
		ESTIMATED BLOOD LOSS:	on,
		INDICATIONS: We did adjust the Geodon a little bit over the weekend, based on natient having some	e, (
	Close		on,

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 files(s) to download



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

Paula Simpson Workflow Manager Fo	lder					Folders	psimpsor Settings	1 5.8.326 <u>1</u> Reports	
🗐 🔁 🗮 音 🍸 🏞 Ro	oute 용 Cha	nge Dictat	or 당 Submit 🐻	Case Info	🖥 Open 🐠 Play 属 Mo	we 🧼 Export 闠 De	elete 🕜 🖯	lyr	2yr A
All Facilities	≡	DID	Dictator	Length	Status	First	Last	TAT	Re
filter	8				delivered				
🟙 Workflow Manager	Total	# 5000	-	22:57:16	-	-	-	-	
My Documents	=	42450	Woodard, Ja	0:00:02	In Final	Lisa	Calkre	1hr STAT	
J. Arnold	=	42448	Woodard, Ja	0:00:01	In Final	Lisa	Calkre	Standard	
T. Bales	×		Flags		Final	susie	smith	Standard	
S. Demo Provider	=	None	Red Blue G	Green Yellov	v Final	Lewis	Scott	Standard	
J. Drood	=				Final	Jimmy	Arrowood	Standard	
A. Fairchild	=		Copy DIDs to Clipb	oard	Final	Louis	Freeman	Standard	
M. Harris J. Johnson			Copy Dictation	n					
J. Malk	=		Preview		Final	Tim	Smith	Standard	
D. McLaughlin	=	(Download		Final	SERENA	McLeod	Standard	
💽 I. Mehta	=		Change TAT		Final	Sierra	Connors	Standard	
G. Miller	=				Final	JOHN	DOE	Standard	
 D. Mizell J. Renault 			Audit Trail		Final	Carmen	Keilor	Standard	
J. Renault M. Sanders			Document Histo	2 C		Carmen	Kellor	Standard	
A. Shah	=	273723	Woodard, Ja	0:00:07	In Final	Limit 1	00	8hr STAT	E 1
Simple View	=	156525	Mizell, David	0:00:06	In Final	no	dictation	Standard	

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

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

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



	ite 🚜 Cha	inge Dictat	or 🤯 Submit 📷	Case Info	📑 Open 🐠 Play 属 Move 🤌	Export 🗑	Delete 🕜 📛	₽ 1yr	2yr /
All Facilities	=	DID	Dictator	Length	Status	First	Last	TAT	-
filter					delivered				
	•		🔶 Set Se	parator		×			
Workflow Manager	Total	# 5000	-				-	-	
My Documents All Documents	=	42450	Wood	vnat separato	r should the filename use?		Calkre	1hr STAT	
J. Arnold	=	42448	Wood	→ Dash (···)		Calkre	Standard	
T. Bales	=	42449	Wood	/ Dash (.)		smith	Standard	
S. Demo Provider				→ Under	score ("_")				
L. Direnfeld	=	47908	Tille, (Scott	Standard	
J. Drood	=	113445	Wood	\rightarrow Space	(" ")	у	Arrowood	Standard	
A. Fairchild	=	119917	Wood				Freeman	Standard	
M. Harris J. Johnson				\rightarrow Percer	nt ("%")				
J. Malk	=	122028	Wood				Smith	Standard	
D. McLaughlin		125138	Woodard, Ja	0:00:04	In Final	SERENA	McLeod	Standard	
I. Mehta	=	126537	Renault, James	0:00:02	In Final	Sierra	Connors	Standard	
G. Miller		202126	Woodard, Ja	00:00:00	In Final	JOHN	DOF	Standard	
D. Mizell									
J. Renault	=	146552	Woodard, Ja	0:00:04	In Final	Carmen	Keilor	Standard	
M. Sanders A. Shah	=	273723	Woodard, Ja	0:00:07	In Final	Limit:	100	8hr STAT	1
A. Snan Simple View		156525	Mizell, David	0:00:06	In Final	no	dictation	Standard	

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

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

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



^p aula Simpson Vorkflow Manager Folde	r				psimpson 5.8.326 _FoldersSettings_Reports_	
🗐 🔁 📕 音 🍸 冷 Route	🚑 Cha	inge Dictato	or 🥃 Submit 🐻	Case Inf	o 📑 Open 🜒 Play 属 Move 🧼 Export 資 Delete 👩 🗇 👘 1yr	2yr A
All Facilities		DID	Dictator	Lengt	Select Fields X rt Type	Last M
filter	8				Select filename components from list	
Workflow Manager	Total	# 5000	-	22:57:1	Filename:	-
My Documents	=	42450	Woodard, Ja	0:00:02	patient_last patient_first practitioner_last	Wooda
All Documents J. Arnold	=	42448	Woodard, Ja	0:00:01		Arnold,
T. Bales		42449				
8 S. Demo Provider			Woodard, Ja	0:00:02	patient_last patient_first practitioner_last dov dictationid	Wooda
a L. Direnfeld	=	47908	Tille, Charles	0:00:05		Tille, Cl
 J. Drood A. Fairchild 	=	113445	Woodard, Ja	0:00:01	\rightarrow DID	Evans, .
M. Harris	≡	119917	Woodard, Ja	0:00:06		Wooda
🧃 J. Johnson	≡	122028	Woodard, Ja	0:00:06	→ Practice	Evans,
🔒 J. Malk	=	125138	Woodard, Ja	0:00:04	→ DOV (MMDDYYYY)	Arnold
🗿 D. McLaughlin 🛐 I. Mehta	=	126537	Renault, James	0:00:02		Evans,
G. Miller					→ DOV (MM-DD-YYYY)	
D. Mizell	=	202126	Woodard, Ja	00:00:00	→ Provider ID	Wooda
J. Renault	=	146552	Woodard, Ja	0:00:04		Fairchil
M. Sanders A. Shah	≡	273723	Woodard, Ja	0:00:07	→ Provider First	Evans,
A. Shah	≡	156525	Mizell, David	0:00:06		Evans,
👌 C. Tille	=	181740	Woodard, Ja	0:00:06	\rightarrow Provider Last	Arnold
 P. Vesey D. Wittenberg 	=	181742	Woodard, Ja	0:00:08	→ Patient First	Wooda
J. Woodard	=	178565	Mizell, David	0:00:09		Davis,
🔋 L. Yokochi	=	241125	Woodard, Ja	0:00:09	→ Patient Last	Wooda
	=	261850	Woodard, Ja	0:00:04	→ MRN	
						Davis,
	=	280916	Woodard, Ja	0:00:02	→ DOB (MMDDYYYY)	Davis,
	=	351492	Woodard, Ja	0:00:04		Evans,
	≡	458602	Woodard, Ja	0:00:03	→ DOB (MM-DD-YYYY) ENOTE	Bulbin,
	=	461064	Fairchild, April	0:00:04	→ Done ENOTE	Fairchi
	=	3473029	Woodard, Ja	0:00:01		Argold
Simple View	=	532167	Woodard, Ja	0:00:01	In Final Kirsten Poole Standard OFFICE NOTE	Evans,

Examples of typical filenames are:

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

32101595-Allentown Chiropractice-Johnson

or DOV (MMDDYYYY)_Provider_First_Patient_Last_Practice, which would display as:

02-20-2020_Jessica_Smith_Williams_Dallas-Surgery-Center

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



Step 4: Completing the filename

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

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

Step 5: Choose download location

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

Paula Simpson Vorkflow Manager Fo	lder							Folders		n 5.8.326 Reports	
🗐 🔁 📓 音 🍸 衿 Ro	ute 용 Cha	nge Dictator	r 당 Submit 🐻	Case Info	📑 Open	🕘 Play [🛃 Move 🤌	Export 闠 Dele	ete 🕜 📁	P 1yr	2yr A
All Facilities	=	DID	Dictator	Length	Status	First	Last	TAT		eport Type	Last N
filter	8	Select Folde	r		1.12				4	×	
Workflow Manager	Total	$\leftarrow \rightarrow$	🗠 🛧 🛄 > This	PC → Des	sktop		v © ∨	Search Desktop		م	-
My Documents	=	Organize ·	 New folder 							?	Wooda
J. Arnold	=	<u> </u>	Name			^				Date r ^	Arnolo
🗿 T. Bales	=	u	finished	mails						12/11/	Wooda
🚯 S. Demo Provider	=	🐉 Dre		emails 1202	2019					12/11/	Tille, C
L. Direnfeld	_	Jan d	Master N	lanual Proje	ect					1/10/2	
J. Drood A. Fairchild	=	E C	other							1/10/2	Evans,
M. Harris	=	Jan C			les NOT TE	ST				1/10/2	Wood
J. Johnson	=	os r		Link projec	ct					12/11/	Evans,
🔮 J. Malk	=	_	Returned							1/10/2	Arnolo
D. McLaughlin		Jak H	screensh							11/22/	
🔋 I. Mehta G. Miller	=	🧟 n	Transcrip							1/10/2	Evans,
D. Mizell	=	S C								>	Wood
J. Renault	=		Folder:	Transcript	tions						Fairchi
M. Sanders	=		roidei.	nanscript	lions		_			_	Evans,
🗿 A. Shah	_							Select Folder	Cance		
A. Shah	=		,							.::	Evans,
C. Tille	=	181740	Woodard, Ja	0:00:06	In Final	John	Smith	1hr STAT			Arnold
 P. Vesey D. Wittenberg 	=	181742	Woodard, Ja	0:00:08	In Final	Louis	Freeman	Standard			Wooda

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

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

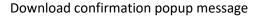


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WebChartMD File Download

Successfully downloaded C:\Users \traci\Desktop\Transcriptions\smithsusie-Woodard-03092007-42449.doc

com.squirrel.wcmd.WebChartMD.DocHandler



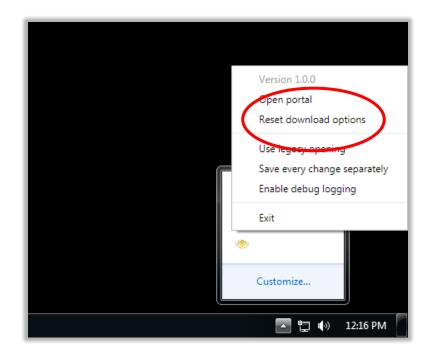
	> Transcriptions		5 ~	Search Tran 🔎
^	Name	Date modified	Туре	Size
📌 Quick	🗑 Adams-Beth-Malk-05192019-34504479.doc	1/10/2020 10:26 AM	Microsoft Word 9	13 KB
E 🖈	🖬 Adams-John-Arnold-06212019-34588258	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
🕂 E 🖈	🖬 Apollos-Zebe-Arnold-06212019-3458810	1/10/2020 8:55 AM	Microsoft Word 9	21 KB
🏥 C 🖈	Aramonte-Dennis-Arnold-06212019-3458	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
📰 F 🖈	🐨Arnold-11082019-35011016.doc	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
AIP	🖬 Arrowood-Jimmy-Woodard113445.doc	1/10/2020 11:50 AM	Microsoft Word 9	24 KB
Dict	🖬 Bales-Johnny-Arnold-05232019-34504518	1/10/2020 8:55 AM	Microsoft Word 9	21 KB
NLP	💼 BLANK-SYSTEM-Arnold-09272019-34588	1/10/2020 8:55 AM	Microsoft Word 9	27 KB
	💼 Calkre-Lisa-Woodard-03092007-42448.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
user	🗑 Calkre-Lisa-Woodard-03092007-42450.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
😻 Dropł	Chresten-Martin-Arnold-06212019-34588	1/10/2020 8:55 AM	Microsoft Word 9	31 KB
🚉 dict	🐨 Freeman-Louis-Woodard-06132007-1199	1/10/2020 11:50 AM	Microsoft Word 9	26 KB
💷 Enri	🖬 Kline-Mercy-Arnold-06212019-34877487	1/10/2020 8:55 AM	Microsoft Word 9	33 KB
🚉 File	🖬 McCord-James-Arnold-11202019-345880	1/10/2020 8:55 AM	Microsoft Word 9	33 KB
	📝 Scott-Lewis-Tille-03142007-47908.doc	1/10/2020 11:50 AM	Microsoft Word 9	22 KB
finis	💼 Smith-Alice-Arnold-06212019-34588257	1/10/2020 8:55 AM	Microsoft Word 9	14 KB
<u> H</u> IP	💼 smith-susie-Woodard-03092007-42449.doc	1/10/2020 11:50 AM	Microsoft Word 9	23 KB
🁧 mec				
onE				

The transcribed documents downloaded to the selected location.

Notes:

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





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

3



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.

🚄 🔁 📓 音 💡 🔍 Sea	rch 闠	Delete 🕜	þ.							1yr 2yr <mark>/</mark>
All Facilities		DID	Facility	Dictator	Dictated	Uploz 2	Finished	First	Last	ID #
		34588265	Hampton Rad	Arnold, Jimmy	06/21/19 13:52	06/21/	09/27/19 11:47	Maddy	Lundgrens	100112
filter	=	34588264	Hampton Rad	Arnold, Jimmy	06/21/19 13:52	06/21/19 13:56	09/27/19 11:45	Maddy	Lundgrens	100112
My Documents	=	34588275	Hampton Rad	Arnold, Jimmy	06/21/19 13:51	06/21/19 13:54	09/05/19 15:43	Joan	Miller	383755
All Documents Pending		34504521	Hampton Rad	Woodard, Ja	05/23/19 15:33	05/23/19 15:36	05/29/19 10:15	Floyd	Abernathy, Jr.	000198383
Inbox		34504482	Hampton Rad	Johnson, Jim	05/23/19 15:30	05/23/19 15:35	05/23/19 17:07	Dennis	Banks	02876667
Rejected		34393987	Advanced Ort	Shah, Ashish	04/18/19 15:12	04/18/19 15:15	05/14/19 09:36	SYSTEM	BLANK	SYS-BLANK
Final		34290097	Hampton Rad	Arnold, Jimmy	03/15/19 18:01	03/15/19 18:01	03/15/19 18:01	Ryan	Gise	BBA-151
J. Arnold	=	33588796	Hampton Rad	Fairchild, April	08/07/18 05:33	08/07/18 05:37	09/17/18 15:12	Jane	Doe	^CMFSLDJ
T. Bales	=	33415907	Hampton Rad	Arnold, Jimmy	06/11/18 12:04	2:07				
T. Burton	=	33415897	Hampton Rad	Arnold, Jimmy	06/11/18 12:01	3				

The Rejected folder consists of three important areas:

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



3

1

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

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



Folder Management Functions

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

All available Folder Management Functions viewable in the All Documents Rejected and their descriptions can be found starting on page 56.

Columns

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

Column Management

See page 30 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 69. For a detailed description of Row and Page Settings, see page 20.

File Action Menu

All available "File Action Menu" options viewable in the All Documents Rejected and their descriptions can be found starting on page 34.



Final

Betty Warren Final Folder										Folders	bettyw Settings	<mark>5.8.340 <u>r</u> Reports</mark>	
🗧 🔁 📓 🚔 🍸 🔍 Search	י 📑	Open 昌 Pr	int [Cas	e Inf	• 🚊	Fax 闠 Delete 🌘	0				1yr	2yr All
All Facilities	≡	DID	6	2 [6		Facility	Dictator	Dictated	Uploaded	Finished V	First	
	=	35137852					Hampton Rad	Arnold, Jimmy	12/18/19 13:38	12/18/19 13:40	04/20/20 13:09	SYSTEM	BLAN
filter	≡	35137844					Hampton Rad	Arnold, Jimmy	12/18/19 13:36	12/18/19 13:39	04/20/20 09:39	Allison	Smith
My Documents	≡	35068759					Hampton Rad	Arnold, Jimmy	11/26/19 12:32	11/26/19 12:35	04/20/20 09:37	SYSTEM	BLAN
All Documents	≡	35246373					Hampton Rad	Arnold, Jimmy	01/27/20 13:09	01/27/20 13:11	04/20/20 09:35	SYSTEM	BLAN
Pending Inbox	=	35183604					Hampton Rad	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:35	SYSTEM	BLAN
Rejected	≡	35183603					Hampton Rad	Arnold, Jimmy	01/07/20 11:26	01/07/20 11:28	04/20/20 09:34	SYSTEM	BLAN
Final	=	35409609	•		C)	Hampton Rad	Arnold, Jimmy	03/18/20 14:16	03/18/20 14:16	03/18/20 14:16	j John	Smit
J. Arnold T. Bales	=	35408943	•		C)	Hampton Rad	Arnold, Jimmy	03/18/20 12:08	03/18/20 12:08	03/18/20 12:08	John	smitł

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 56.

Columns

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

Column Management

See page 30 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 69. For a detailed description of Row and Page Settings, see page 20.

File Action Menu

All available "File Action Menu" options viewable in the All Documents Final and their descriptions can be found starting on page 34.



Dictator Folders



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

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



Document Management

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

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.

<u>QA</u>: 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.

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

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

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

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

** Please Note: Workflow Manager is a Transcription Team Administrator feature and not a feature applicable to Staff. For instructions on the use of the Workflow Manager, please speak to your Administrator for more details.

<u>E-Signed</u>: 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.



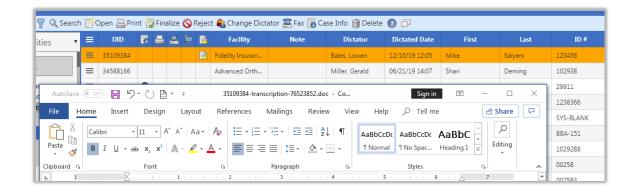
A pop-up message (below) alerts any users attempting to access that the document is already being accessed by another user, and that access to a read only version is available.

Paula Simpson Inbox Folder						Folde			-
🔄 😂 📓 🚔 🍸 🔍 Searc			rint 🕎 Finalize 🚫 Reje	ect 🦚 Change I	Dictator 🖀 Fax	🐻 Case Info	Delete 🕜 戸		
All Facilities									
filter				A.J		Mar, Gerald	06/21/19 14:07	Shari	De
Workflow Manager		34504486	File locked b	y another	user	old, Jimmy	05/23/19 15:33	Franklin	Ma
My Documents		34504489	Another user by	s this docum	ontonon	old, Jimmy		Jessica	Lev
Pending		34393987	Another user ha It has been lock Any changes m	ed to preven	t editing.	n, Ashish	04/18/19 15:12		
Inbox						old, Jimmy		Ryan	Gis
Rejected		34215312	Click below to o Cancel to exit.	open a read-c	only copy or	shild, April	02/25/19 10:11	Marcia	
Final						d, Samual		Alberts	
M. Abbott S. Abraham		33737752	Open read-or	nly Cano	el	ding, David	09/11/18 09:18	Albert	Sm
S. Ackerman		33499492				d, Samual	03/01/18 14:12	Lorie	Kle
N. Adair A. Ahmed		33499490		Maplewood S		Reed, Samual	03/20/18 11:26	Jane	Do
N. Ahmedli	Ξ	33499096		Maplewood S		Conner, Charl	07/09/18 13:51	Jimmy	An

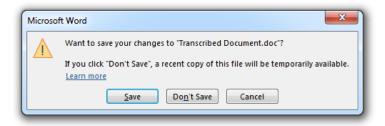


Edit

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

1

2

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

Paula Simpson Workflow Manager Folde	er					(1	F		son 5.8.326 <u>r</u> gs Reports	
🗐 🔁 🔚 骨 🍸 À Route	e 🚷 Cha	nge Dictato	r 당 Submit 🐻	Case Info	P Open (🌒 Play 🔜 Mo	Export 🎬 I	Delet	e 🕜 🗇	1yr	2yr All
All Facilities	≡	DID	Dictator	Length	TAT	Routed T	loo		Report Type	Last Modified	Comme
filter	8							2			
💼 Workflow Manager	Total	# 159	-	2:38:05	-	-	-	-	- /		-
My Documents	≡	34588085	Arnold, Jimmy	0:01:24	1hr STAT	Johnston, Bar			ULTRASOUN	4	
J. Arnold	=	34588273	Renault, James	0:00:46	the STAT	Wallace, Con			PLAM		
T. Bales	≡	34588277	Renault, James	0:00:46	2	Wallace, Con	(ſ	o nie Wallace ope	ned at 01/14/20 12	42
 S. Demo Provider L. Direnfeld 	≡	34588274	Johnson, Jim	0:00:46	IN STAT	Wallace, Con		6			_
J. Drood	≡	34877460	Bales, Traci	0:00:46	1hr STAT	Pool	Cardio Pool		ULTRASOUND	1	
A. Fairchild M. Harris	=	34588279	Renault, James	0:00:46	1hr STAT	Pool 3	Cardio Pool				
J. Johnson J. Malk	≡	34588260	Johnson, Jim	0:01:05	1hr STAT	Pool	Cardio Pool			i.	

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:

- 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.

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".

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.

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:

3

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

1

Clicking the "Settings" in the top right side of the Portal switches the "Folders View" to display the "Settings View" for a user with the "Staff" role on the Transcription Team.

**Please note: the functionality displayed on the following Staff user are the default settings permissions for this user type. A wide range of additional permissions and system access capabilities are available for the "Staff" role. For a listing of all permissions, please see the Administrative version of the user manual.

	- 48 (Change Dic	tator	🕐 Route 🍟 De	elete 🕜 🗇								1yr 2yr	r /
All Facilities	≡	DID	2	File Name	Facility	Uploaded	Dictated	Dictator	Po		Length	Report Type	First	
	≡	35362501		jarnold-03032	Hampton Rad	03/03/20 15:34	03/03/20 15:34	Arnold, Jimmy		r STAT	0:00:06	XRAY	Alicia	5
filter	≡	35362492		jarnold-03032	Hampton Rad	03/03/20 15:34	03/03/20 15:34	Arnold, Jimm		2hr STAT	0:00:09		Bryce	F
My Documents	≡	35362377		jarnold-03032	Hampton Rad	03/03/20 15:09	03/03/20 15:09	Arnold,		2hr STAT	0:00:07		Connie	F
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		Bryce	F
 All Documents J. Arnold 	≡	35362130		jarnold-03032	Hampton Rad	03/03/20 14:29	03/03/20 14:29	Arnold, Jimmy	General Pool	2hr STAT	0:00:23			
T. Bales	≡	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	=	35344678		irenault-1008	Hampton Rad	02/26/20 17:29	10/08/19 10:07	Renault, James		Standard	0:00:10			

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

Betty V Settings	Narre 1								Folders	bettyw 5.8.340 <u>report bug</u> Settings_ Reports Logout
🗐 ờ Ex	port Address Book									
A	All Facilities	name or nur	nber	Search Cle	ear					
A M	y Settings	Practice Name	Location	Fax	Phone	City	State	Auto Fax	Save	New Delete
	, 5	Healing Hearts	South Ridge	(555) 555-5555	555-555-5555	Green Haven	NY	1	Save	
Char	nge Password	Insurance Com				Cedar Bluff	VA		Ad	dress Book Details
Add	Address Book Internal Medici (555) 555-5554 Cedar Bluff VA President 2 John Smith Location (555) 555-5554 Image: Comparison of the second	Bractico Non								
		John Smith	Location	(555) 585-5555						
	$\left(2\right)$	ss Book Internal Medici (555) 555-5554 Internal Medici Practice Name 2 John Smith Location (555) 555-5555 Image: State of the sta	Practice	(555) 555-5	3 ²⁷⁻⁶³²⁵					(4)
		Rodgers Medic	Operation Operation <t< td=""><td></td></t<>							
		Sander's Family	North End	(555) 555-5555	555-555-5555	Johnson City	TN		Address 1	
		Smith Family M				Johnson City	TN		Address 2	
		Washington Int		(555) 555-5555	555-555-5555	Johnson City	TN		Address 3	
									Address 4	
									City	
									State	
<u> </u>										

Folder Management Functions: This Tools within the Folder Management toolbar vary according to the settings folder and permission levels of the user.



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

2

Details Panel: This panel in the right side usually provides the fields and dropdown menus of the actual settings.

Folder Management Functions

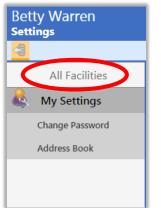
The Export Address Book function works just like the Export function under Inbox.



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.

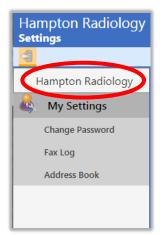
View for All Facilities



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:

Betty Warren Settings	bettyw 5.8.340 report bug Folders Settings Reports Logout
4	
All Facilities	Change Password
🎄 My Settings	Current Passw
Change Password	Confirm Passw
Address Book	Passwords must be at least 8 characters in length, and contain at least one number, special character, or upper case letter. Change

🛇 Failed Faxes 🔚 Resen	d Selected 🥖	Export Failur	es for Month						
dvanced Orthopaedics	did, nan	ne, or fax nu	mb Search C	lear					
My Settings	DID	Recipient	Number	Status	Details	Patient	Dictated Date	Queue Date	Process Date
	32189581	Test	(888) 215-4471	success	Success	Robert Smith (06/12/17 09:30	10/04/17 12:14	10/04/17 12:3
Change Password	31261746	Nathan Test	(888) 215-4471	success	Success	Jason Anderso	10/03/16 09:55	01/02/17 15:04	01/02/17 14:0
Fax Log	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 14:0

Details Panel

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



Export Address Book								
Hampton Radiology	name or nu	mber S	earch Clear					
My Settings	Practice Name	Location	Fax	Phone	City	State	Save	New Delet
· · ·	ABADEER, PETE	Medical Hills In	(309) 661-3394	(309) 663-8311	Bloomington	IL	Sare	
Change Password	ABDEL-MEGUI		8159379310	8159379300	Kankakee	IL	Addr	ess Book Details
Fax Log	Alice Smith	Kingsport, TN	(555) 555-5555				Practice Name	
Address Book	Bob Jones	ABC Street	(777) 777-3687	0 -				
	Bush Family Pr		(423) 595-6254	423-971-6323	Bristol	TN	Location	
	Cardiology Ass	Westminster C	(512) 991-2284		Morrison	TN	Fax	
	Corneliu Anton		(907) 459-3555	(907) 459-3520	Fairbanks	AK	Phone	
	Cornerstone In	Bullock County	(888) 215-4471		Macon	GA	Address 1	
	Cornerstone In	Salisbury	(212) 555-1212		Macon	MS	Address 2	
	Deer Valley Fa	Phoenix	(702) 555-1212	(602) 942-0648	Phoenix	AZ	Address 3	
	Dept of Surgery		(777) 555-1212				Address 4	
	Doen Pediatrics		(555) 121-2121				City	
	Dr. Alan Stone		(246) 583-8484	() - Ext.			State	
	Dr. Alan Wilson		(786) 887-3331	0 -	Kingsport	TN	Zip	
	Dr. Albert Jones		(201) 555-1212				Auto Fax	
	Dr. Albert Jones							

Details Panel highlighted

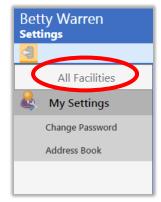


My Settings

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

"All Facilities" View

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



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

Change Password is used for password updating.

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

Named Facility View

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

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



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

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



"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	
Change Password	Confirm Password	
Office	Passwords must be at le	ast 8 characters in length, and contain
Address Book	at least one number, spe	cial character, or upper case letter.
Account Settings		
Workflow Settings	Change	

Address Book

Although the Address Book is seen in the Settings Pane under All Facilities, it is not used. Address Books are stored and maintained under each respective named Facility. See the Address Book section on page 84 for more information.

Named Facility Functions

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

Fax Log

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

Failed Faxes

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



Resend Selected

Sett	vanced Orthopaed sings © Failed Fixes 🕿 Resend		Export Failu	res for Month			psir Folders Setti	mpson 5.8.326 ings Reports	
Ac	lvanced Orthopaedics	uid, nar	ne, or fax nu	umb Search	Clear				
8	My Settings								Queue Da
	, ,	32189581	Test	(888) 215-4471	success	Success	Robert Smith	06/12/17 09:30	10/04/17 12
	Change Password	31261746	Nathan Test	(888) 215-4471	success	Success	Jason Anders	10/03/16 09:55	01/02/17 15
									01/02/17 15
	Address Book Fax Cover Sheet Account Settings		Resend	98833 t: Nathan					
			(555) 55 Send	Cancel					

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

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

Export Failures for Month

This feature is currently disabled.

Fax Log Column Display

Columns displayed in the Fax Log and their meanings are:



🛇 Failed Faxes 🚞 Res	end Selected 🦂	Export Failures fo	or Month						
Hampton Radiology	did, nan	ne, or fax numb	Search Clear						
My Settings	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 14:1
Change Password	34588256	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu	smith lowen (^	06/21/19 13:57	12/05/19 14:16	12/05/19 14:1
Fax Log	34588072	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu	James McCord	06/21/19 13:52	12/05/19 14:16	12/05/19 14:1
Address Book	34588220	Lowen Bales	(555) 555-5555	failure	Calls to 555 nu	James Arrowo	06/21/19 14:01	12/05/19 14:16	12/05/19 14:1
Fax Cover Sheet	34290094	Dr. Jenny Lawr	(888) 215-4471	success	Success	Abe Mueller (2	03/15/19 17:58	04/23/19 11:59	04/23/19 12:0
Account Settings	33282793	James Miller MD	(888) 215-4471	success	Success	Jim Cooper (29	04/30/18 12:30	04/18/19 14:03	04/18/19 14:0
	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 10:1
	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 10:1
	32163790	Dr. Jenny Lawr	(888) 215-4471	success	Success	Amber Bachma	06/12/17 09:30	03/04/19 15:56	03/04/19 15:5
	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 15:5
	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 11:5
	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 13:4
	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 13:4
	30995044	AutoFax - Web	(888) 215-4471	success	Success	Frank Smith (0	08/15/16 11:51	09/18/18 14:39	09/18/18 14:40

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

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

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

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

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

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

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

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

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

Address Book

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

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Accessing Facility Address Books

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

Adding an entry

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

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

Hampton Radiology	name or nu	mber	Search Clea	ir 👘			
My Settings	Practice Name	Location Medical Hills In	Fax	Phone (309) 663-8311	City	State	Auto I Save New Dele
Change Password Fax Log	ABADEER, PETE ABDEL-MEGUI Alice Smith	Kingsport, TN	8159379310 (555) 555-5555	8159379300	Bloomington Kankakee	IL IL	Address Book Details
Address Book Fax Cover Sheet Account Settings	Bob Jones Bush Family Pr., Cardiology Ass, Corneliu Anton, Cornerstone In, Cornerstone In, Deer Valley Fa., Dept of Surgery Doen Pediatrics dr jones Dr, Linda Finch Dr, Alan Stone Dr, Alan Wilson Dr, Albert Jones Dr, Alce Keen Dr, Andrew Phil	Save		Delete 3 ils 20 commons 4 4 5	Bristol Morrison Fairbanks Maco p Kingsport Johnson City	TN TN AK GA AZ TN TN	Practice Name Location Fax Phone Address 1 Address 2 Address 3 Address 4 City State Zip Auto Fax Autofax Trigger (None Selected)

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



ampton Radiology •ttings								Folders		.8.326 <u>report b</u> eports Logo
📒 ờ Export Address Book										
Hampton Radiology	name or nu	mber	Search Clea	r						
My Settings	Practice Name	Location	Fax	Phone	City	State	Auto	Save	New	Delete
	ABADEER, PETE	Medical Hills In	(309) 661-3394	(309) 663-8311	Bloomington	IL .		Juve	nen	Delete
Change Password	ABDEL-MEGUI		8159379310	8159379300	Kankakee	IL .		Ad	dress Book	Details
Fax Log	Alice Smith	Kingsport, TN	(555) 555-5555					Des etiles Manua		
Address Book	Bob Jones	ADO DITECT	(777) 777 5007	0-				Practice Name	·	
Fax Cover Sheet	Bush Family Pr		(423) 595-6254	423-971-6323	Bristol	TN		Location		
	Cardiology Ass	Westminster C	(512) 991-2284		Morrison	TN		Fax		
Account Settings	Corneliu Anton		(907) 459-3555	(907) 459-3520	Fairbanks	AK	1	Phone		
	Cornerstone In	Bullock County	(888) 215-4471		Macon	GA		Address 1		
	Cornerstone In	Salisbury	(212) 555-1212		Macon	MS		Address 2		
	Deer Valley Fa	Phoenix	(702) 555-1212	(602) 942-0648	Phoenix	AZ		Address 3		
	Dept of Surgery		(777) 555-1212					Address A		

Notes related to address book entries:

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

Searching an entry

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

🗐 🏕 Export Address Book								10			
Hampton Radiology	name or nu	mber	Search Clea	ar							
My Settings			1.000	Phone	City	State	Auto I	Save N	ew D	elete	
	ABADEER, PE	edical Hills In	(309) 661-3394	4 (309) 663-8311	Bloomington	IL.	8				
Change Password	ABDEL-MEGUI		8159379310	8159379300	Kankakee	H.	8	Address B	ook Detail	s	
Fax Log	Alice Smith	Kingsp	55) 555-5555	5			- 8	Practice Name			
Address Book	Bob Jones	ABC Street	777-3687	7 0 -			- 6	Plactice Name		_	
Fax Cover Sheet	Bush Family Pr		19	cord				Search Clear			
A	Cardiology Ass	Westminster C	(512) 99	card				Search Clear			
Account Settings	Corneliu Anton		(907) 45	Practice Nar	ne l	locatio	n	Fax	Phone	City	State
	Cornerstone In	Bullock County	(888) 21								
	Cornerstone In	Salisbury	(212) 55	Cardiology As	s West	minste	r Co	(512) 991-2284		Morrison	TN
	Deer Valley Fa	Phoenix	(702) 55								
	Dept of Surgery		(777) 55								
	Doen Pediatrics		(555) 12								



Auto-fax Setup

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

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

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

Hampton Radiology	name or nu	mber	Search Clea	r					
My Settings	Practice Name	Location	Fax	Phone	City	State	Auto	Save	New Dele
	ABADEER, PETE	Medical Hills In	(309) 661-3394	(309) 663-8311	Bloomington	IL .		Sare	
Change Password	ABDEL-MEGUI		8159379310	8159379300	Kankakee	IL .		Addr	ess Book Details
Fax Log	Alice Smith		Denotion Manua						
Address Book	Bob Jones	ABC Street	(777) 777-3687	0 -					
Fax Cover Sheet	Bush Family Pr	ly Pr (423) 595-6254 423-971-6323 Bristol TN	Location						
	Cardiology Ass	Westminster C	(512) 991-2284		Morrison	TN		Phone	
	Corneliu Anton		(907) 459-3555	(907) 459-3520	Fairbanks	AK	Ø		
	Cornerstone In	Bullock County	(888) 215-4471		Macon	GA			
	Cornerstone In	Salisbury	(212) 555-1212		Macon	MS		Address 2	
	Deer Valley Fa	Phoenix	(702) 555-1212	(602) 942-0648	Phoenix	AZ		Address 3	
	Dept of Surgery		(777) 555-1212					Address 4	
	Doen Pediatrics		(555) 121-2121					City	
	dr jones		0 -	() - Ext.				State	
	Dr, Linda Finch		0 -	0 - Ext.				Zip	
	Dr. Alan Stone		(246) 583-8484	() - Ext.				Auto Fax	
	Dr. Alan Wilson		(786) 887-3331	0 -	Kingsport	TN		Autofax Trigger	(None Selected)
	Dr. Albert loner		(201) 555-1212	_				Autoriax migger	(None Selected)
					Johnso	TN	1		
	(None Selected) (None Selected)								

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

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



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

Columns

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

ok								
y	name or number	Search Clear						
	Practice Name	Location	Fax	Phone	City	State	Auto Fax	Trigger
	OT. Alice Reen		(555) 555-5555		Johnson City	115	-	esigned
ngs	Dr. Andrew Phillipe		0 -	0 - Ext.				eSigned
	DR. BHASIN		(708) 799-2411	(708) 799-3044	HAZELCREST	IL.		
	DR. BHOOPAL		(708) 388-4933	(708) 388-4911	PAOLS HEIGHTS	IL.		
	Dr. David Andrews		0 -	() - Ext.				eSigned
	Dr. David Harris		(575) 837-5467	() - Ext.				eSigned
	Dr. David Smelzer		(346) 546-4768	0 - Ext.				eSigned
	Dr. Frank DeMollo		(888) 215-4471					
	Dr. Haines		0 -	0 - Ext.				eSigned
	Dr. Herald Jones		0 -	0 - Ext.				eSigned
	Dr. Janice Bays		(476) 327-5603	0 - Ext.				eSigned

<u>Practice Name</u>: This column displays the Name for the address book entry.

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

Fax: This column displays the fax number.

<u>Phone</u>: This column displays the phone number.

<u>City</u>: This column displays the City.

State: This column displays the State.

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

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



Reports View



Reports

The Reports area is the third functional area within the WebChartMD platform, as shown in the topright corner of the user's online account (see below).

Betty Warren	bett sett bug
Reports	Folders Settings Reports L jout
All Facilities	

Premade Reports

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

<u>Esigned Reports</u> – 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 <u>www.webchartmd.com/downloads</u>. It is listed as 'Express Scribe Setup'.

						Unline Demo ζ
	Web ChartM D		Big Data	For Hospitals	For Clinics	For Transcription Compan
	WEDCHAITMD					The Technology tha
		e Provider Client v1 (Requ a Provider Client v2 (Requ lical Language Specialist o Portal Document Handle ress Scribe Setup	uires .NET 4.7) <u>Client v2</u> (Requ <u>P</u>	ires .NET 4.7)		
ŀ	iome HIPAA Enforcement Privac	USUN Framework 4.				

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.

License Agreement	
Please read the following License Agreement. You must accept the terms of this agreement befor continuing with the installation.	ne
 The copyrights in this software and any visual or sudo work distributed with the software belong to NCH Software and othen litted in the abota box. All rights are reserved. Installation of this software is loceneed only in accordance with these terms. By installing, using or distributing this software you, on your own behalf and on behalf of your own behalf software belong to may not use. Convey, transmit, distribute, nor install this software - return it to the place of purchase within 14 days to recove a full refund. This software, and all accompanys files, data and materials, are distributed "as is" and with no waranties of any kind, whether express or implied except as required by law. Fyou intend to rely on this software for citical purposes you must test fully prior to using it, install redundart systems and assume any risk. We will not be lable for any loss arising out of the use of this software. To use you can be accompanys files. You can soft for all difficulties of any consequential loss. Your entire remedy against us for all claims for the amount you gaits of the software. You may not use this software in any circumstances where there is any risk that fallure of this software might result in a physical injury or loss of life. You do distribute a software neglitation code for any of our programs whole written permission. The event that you do distribute a software registration code for any of our programs without written permission. The event that you do distribute a software registration code is the software in the event that you do distribute as oftware registration code for any of our programs writted. To may not use table lable to pay the full purchase price for each location where the unsubordized use course. The comparison of this agreement is governed by the laws and courts of the extration could be course. The compare with written terms 	*
Next	Cancel

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:

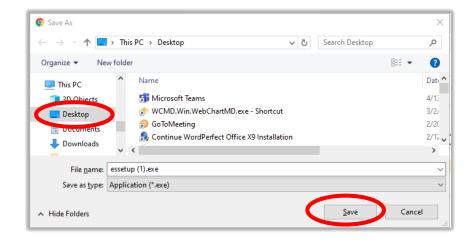
Express Scribe 5.10 is only compatible with Windows 7 and hence needs to be run in compatibility mode for Windows 8/10 installation. **This step is not needed for Windows 7 installation**.

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'.

WebChartMD				💽 Online Demo 🕠
The Technology that Care Provider Client v1 (Requires .NET 4.7) Medical Languages Seecials Client v2 (Requires .NET 4.7) Medical Languages Seecials Client v2 (Requires .NET 4.7) Web Portal Document Handler Den link in new gab Open link in incognito window Save ling as Copy link address		Big Data For Hospitals	For Clinics	For Transcription Companie
Care Frovider Clent v2 (Requires .NET 4.7) Medical Language Specialist Clent v2 (Requires .NET 4.7) Web Portal Document Handler Express Scribe Servin Microsoft .NET Open link in new tab Save ling as Copy link address	WebChartMD			The Technology that I
Microsoft.NET Open link in new tab Open link in new gindow Open link in new gindow Open link in incognito window Open link in incognito window Save link as Save link address	Care Provid Medical Lar	der Client v2 (Requires .NET 4.7) nguage Specialist Client v2 (Requires .NET 4.7)		
Home HIPAA Enforcement Privacy Policy About Us	Express SC Microsoft . N	VET Open link in new <u>t</u> ab Open link in new <u>w</u> indow		
Igspect Ctrl+Shift+1	Home HIPAA Enforcement Privacy Policy About	Copy link address		
		I <u>n</u> spect Ctrl+Shift	+I	

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





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

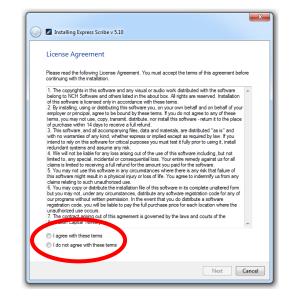
1			
essetu (1).exc		<u>O</u> pen	1
	•	Run as <u>a</u> dministrator	
		Open with Sublime Text	
		Troubleshoot compatibilit <u>y</u>	
		Run with graphics processor $>$	
		Pin to Start	
		7-Zip >	
		CRC SHA	
	2	Edit with Notepad++	
	÷	Scan with Windows Defender	
		Express Zip	
	Ê	Share	
		Give access to	
		Pin to tas <u>k</u> bar	
	Ø	Scan with Malwarebytes	
		Restore previous versions	
		Send to $>$	
		Cut	
		<u>С</u> ору	
		Create <u>s</u> hortcut	
		Delete	
		Rena <u>m</u> e	
		P <u>r</u> operties	



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.

当 essetup.exe Properties 📃 🗾
Security Details Previous Versions
General Compatibility Archive Digital Signatures
If you have problems with this program and it worked correctly on an earlier version of Windows, select the compatibility mode that matches that earlier version. <u>Help me choose the settings</u> Compatibility mode Run this program in compatibility mode for: Windows 7
Settings
Run in 640 x 480 screen resolution
Disable visual themes
Disable desktop composition
Disable display scaling on high DPI settings
Privilege Level
Change settings for all users
OK Cancel Apply

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





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.

		×						
(j) 🖉	talling Express Scribe v 5.10							
Re	ed Programs and Extras							
	are optional extras that complement this program and provide additional functi the tools you might like to use:	ionality.						
	Select all							
	Express Dictate [Recommended] Express Dictate is a professional dictation recorder for any Windows or letting users record and send dictations from their computer.	Mac computer						
	Web Dictate Internet Dictation Software Web Dictate is a dictation system that lets you record, edit and manage the internet with any ordinary web browser.	dictation over						
	Express Delegate Dictation workflow management with the ability to automatically assign t members of typing pools based on customizable rules.	yping tasks to						
C	NCH Software Internet Browser Toolbar Get direct access to all NCH Software from within your browser. Also inc blocker, email notifier, free streaming TV, radio, weather and many other one of the most useful toolbars around and it's free.							
	$\overline{\ensuremath{\mathbb V}}$ Set the default web search to be the NCH Search							
	Set the start page to be the NCH search page							
	By choosing this you agree to the	D.F.						
	Toolbar End User License Agreement Toolbar Priv	Vacy Molicy						
		Finish						

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



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

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

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

🚪 Express Scribe Pr	operties	×						
Security	Details	Previous Varsions						
General	Shortcut	Compatibility						
If you have problems with this program and it worked correctly on an earlier version of Windows, select the compatibility mode that matches that earlier version. <u>Help me choose the settings</u>								
Compositionity moo	-							
Run this prog	gram in compatibility mo	de for:						
Windows 7		-						
Settings								
Run in 256 colors								
Run in 640 x	480 screen resolution							
Disable visual themes								
Disable desktop composition								
Disable display scaling on high DPI settings								
Dévilere Level								
Privilege Level								
Run this program as an administrator								
Change settings for all users								
	ОК	Cancel Apply						

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

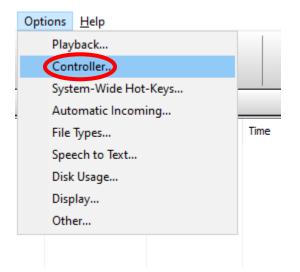


Setting Up Food Pedal:

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

Express Scr		<u>B</u> ookmari 0	ptions lelp				-	
Sync	Load	Dock		itions Suite				Help
6° 🖬 🖷 🗙		▋▋₿₹						
Dictation Name	^		Sender	Date	Time	Duration	Priority	Deadline
<							_	>
<type for<="" notes="" td=""><td>the currently se</td><td>lected dictation he</td><td>re></td><td></td><td></td><td></td><td></td><td>^</td></type>	the currently se	lected dictation he	re>					^

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'



			~ .		e
Disk Usage Playback Controller			Display		Other
Playback	Controller	Hot-Keys	Incoming	File Types	Speech to Te
Enable har	nd-held or foot pe	dal controller			
Active of					
Controlle		None			
Status:		Not configured			
Status.		Not conligued			
	Propert	ties		Command map / t	test
Chapter					
	Controller				
		Controlle	er setup wizard		
		Controlle	er setup wizard		
- Tap lock		Controlle	er setup wizard		
Tap lock		Controlle	er setup wizard		
Enal	ble tap lock		er setup wizard		
Enal			er setup wizard		
Enal	ble tap lock Enable unlock tim	ne-out			
Enal	ble tap lock	ne-out	er setup wizard <u>Purchase</u> a		
Enal	ble tap lock Enable unlock tim	ne-out			
Enal	ble tap lock Enable unlock tim	ne-out			
Enal	ble tap lock Enable unlock tim	ne-out			
Enal	ble tap lock Enable unlock tim	ne-out			
Enal	ble tap lock Enable unlock tim	ne-out			
Enal	ble tap lock Enable unlock tim	ne-out			

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