



DeliverHealth

eScripture One InCommand

User Guide

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Introduction

We are currently in the process of updating the content in this user manual. Please check back soon for the most recent version.

This manual was written from the Medical Transcription Service Organization's (MTSO) perspective when they want to set up an InQuiry workflow for a new customer (client).

InCommand is a HIPAA-compliant, web-based application used by MTSOs to manage the day-to-day transcription operations of their company and their clients. InCommand allows MTSO managers to quickly see the inventory and status of all dictations. They can see the queue of dictations waiting to be transcribed, which dictations are being typed and by whom, the receipt time of the dictation and when it's due, as well as the clinician, client, and document type.

Requirements

To run InCommand, your system must meet the following software and hardware requirements:

Minimum Requirements:

- Windows 10
- RAM: 1 GB or more
- Hard Drive Free Space: 1 GB
- Web Browser: Chrome, Edge, Firefox
- A monitor capable of displaying a resolution of 1366x768 pixels
- Internet Bandwidth: 3 Mbps download; 1 Mbps upload

Recommended Requirements:

- Windows 11
- RAM: 4 GB or more
- Hard Drive Free Space: 1 GB or more
- Web Browser: Chrome, Edge, Firefox
- A monitor capable of displaying a resolution of 1366x768 pixels or higher
- Internet Bandwidth: 3 Mbps download; 1 Mbps upload
- Sound Card with Speakers (or Stereo Headphones).

General Terms

Attributes – There are many options that can be enabled or disabled within InCommand. For the sake of brevity, especially later in this guide, attributes will simply be listed with the value that they should take in the current example, which will usually be ON or OFF. For attributes that require text, a generic “xxx” will be used to represent text, which you must enter.

Commands – These will appear in two places. First, they describe a navigation path through the InCommand user interface. For example, to access the Users section, you will be asked to go to the Workflow, and then click on Users. This has been abbreviated using arrows (“>”) to denote the sequence of commands and looks like “Workflow > Users.”

Commands will also appear in certain sections that allow you to access further options for the selected user, document type, location, etc. When you are asked to select a command in this guide, the name of that command will appear in green, such as [Edit Doe, John](#).

Folders – The InQuiry workflow consists of 7 workflow folders, a Search All folder, Repository, and Invalidated folder (trash can). The 7 workflow folders can be renamed by you to be something more meaningful to your client. There is a 50-character limit on the folder name. You also do not need to use all 7 of the workflow folders in your workflow. They can be individually disabled or enabled.

In the examples presented, we have renamed the workflow folders with square brackets (“[]”) around a shortened name to draw your attention to the fact that we are talking about Folders and that you may rename to what you desire. Therefore, most of the examples use the names [Dictation], [Review1], [Review2], [Preliminary], [Final1], [Final2], [Referral], and [Search All]. In a few examples, we have renamed specific folders to draw special attention to some issue. For example, renaming “[Review2]” to “Manual Sig.” in the third example to draw attention to the setup for manual signature.

How to Log in to InCommand

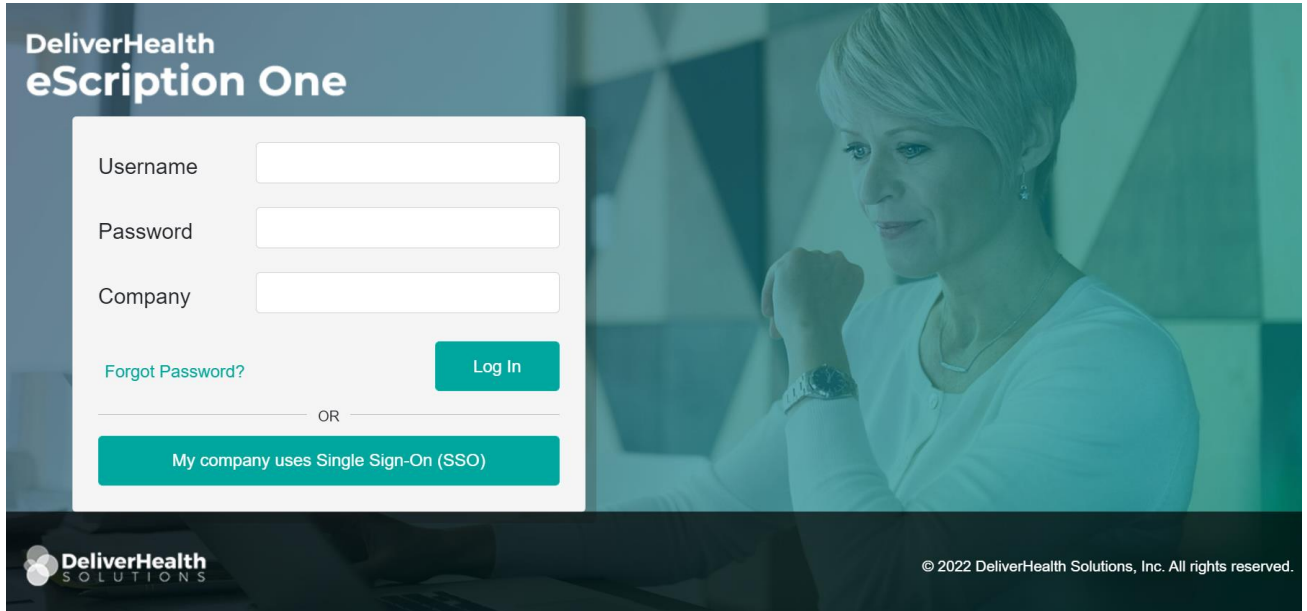
Click on the link for your region below:

Australia: <https://www.escription-one.com.au/tspadmin/>

Canada: <https://www.escription-one.ca/tspadmin/>

United States: <https://www.escription-one.com/tspadmin/>

Enter your login information that has been provided to you. SSO users should choose **My company uses Single-Sign-On (SSO)**.



DeliverHealth
eScription One

Username

Password

Company

[Forgot Password?](#)

OR

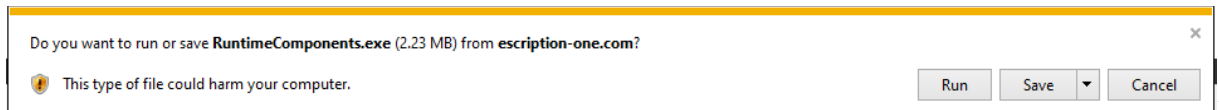
DeliverHealth SOLUTIONS

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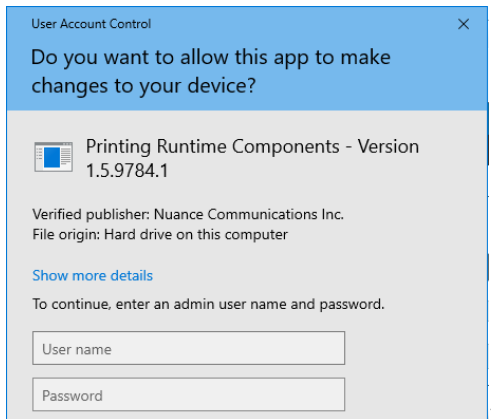
Note: If multi-factor authentication (MFA) has been enabled for your company, please see [Setting up Multi-Factor Authentication Using Auth0 Guardian](#).

The “Forgot Password?” link next to the Login button allows users who have saved a valid email address to receive password reset instructions by email if it is lost or forgotten. For more information, go to [Resetting your Password](#).

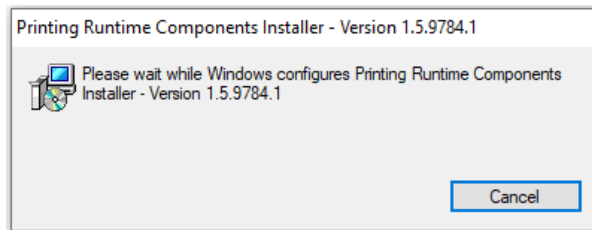
When accessing InCommand for the first time, you may be prompted to download the RuntimeComponents. Click Run in this dialog box if prompted.



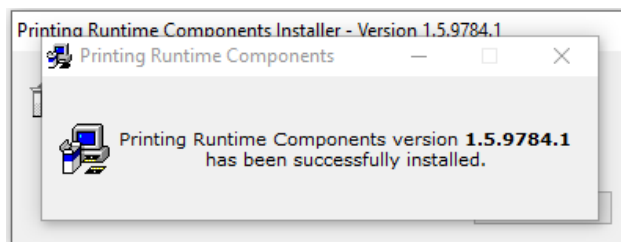
You may be prompted to allow the app to make changes to your device. Enter the credentials you use to log into your computer or have your IT enter the administrative login if you do not have privileges to install software.



You will see the installer running.



When the installation has completed, a message of successful installation will be briefly displayed.



Enabling Multi-Factor Authentication for Transcriptionists

To enable MFA for transcriptionists, check the **Use Multi-Factor Authentication** check box on the Password and Security Options screen (InCommand> Maintenance> Transcriptionists> Edit 'transcriptionist').

Edit Setup for Transcriptionist

- + Transcriptionist Information
- Password and Security Options
 - Use Multi-Factor Authentication** reset multi-factor authentication
 - InCommand Time-Out: 15
 - Audio Playback Method: Play Dictations in Browser (secure)

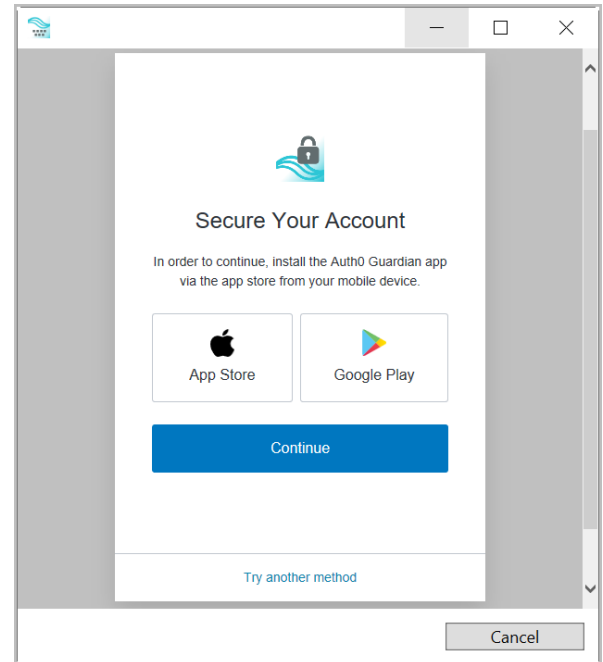
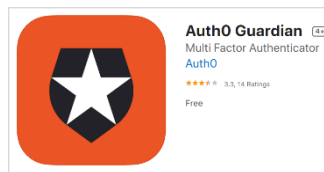
Setting up Multi-Factor Authentication Using Auth0 Guardian

When logging in for the first time after the multi-factor authentication setting has been enabled, you will enter your login credentials as usual. Before the application opens, the 'Secure Your Account' screen appears. Here you begin the one-time multi-factor authentication setup.

Step 1: Download the Auth0 Guardian app

Auth0 Guardian is a free security app for performing multi-factor authentication. With the Guardian app, a notification is sent directly to your cell phone. There are no codes to manually enter; just press 'Allow' to accept the notification.

If you do not have the Auth0 Guardian app already installed on your phone, you must first download it from the Apple store (for iPhone) or Google Play (for Android). Choose the appropriate button to view the location of the app's download site. Search 'Auth0 Guardian' and download it to your phone.

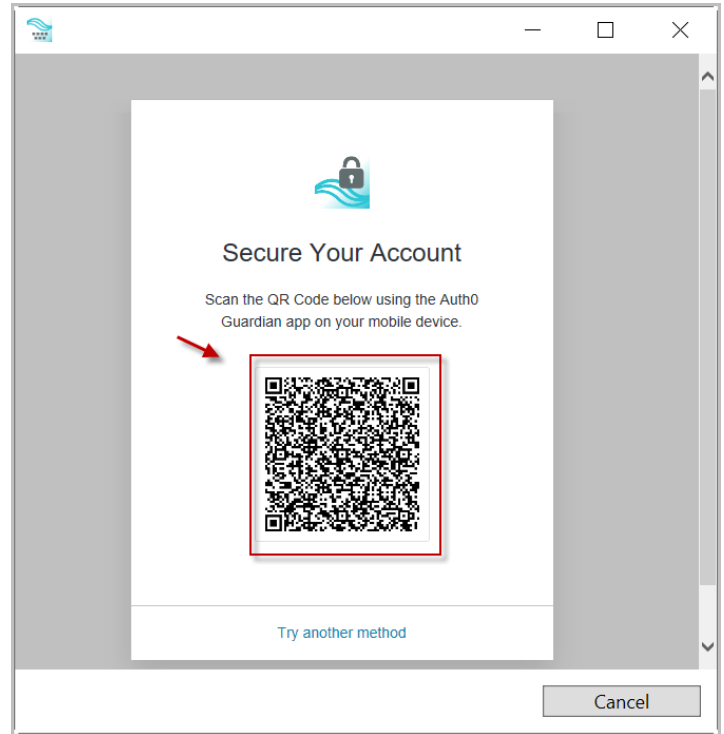


Once you have the authentication app downloaded, open it. In InCommand, click **Continue** on the 'Secure Your Account' screen.

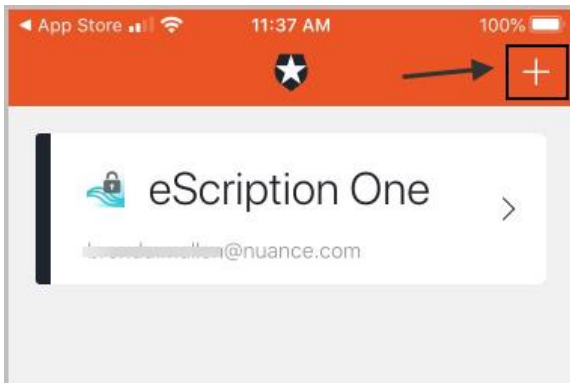
Note: Other authentication apps may work as well but are not officially supported.

Step 2: Scan the Activation (QR) code

Next, use the authentication app to scan the activation code that appears in InCommand by holding your phone up to the code. This will link the authentication app to your InCommand application.



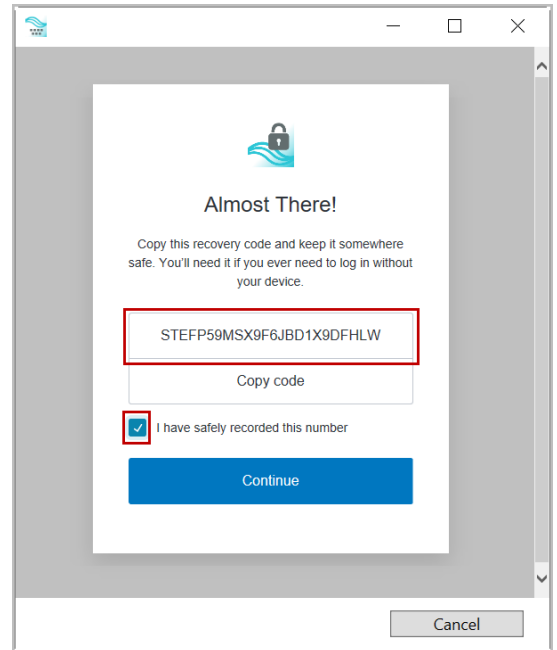
If the scanner does not automatically open, you may need to click the plus button at the top of the Guardian screen to add a new account.



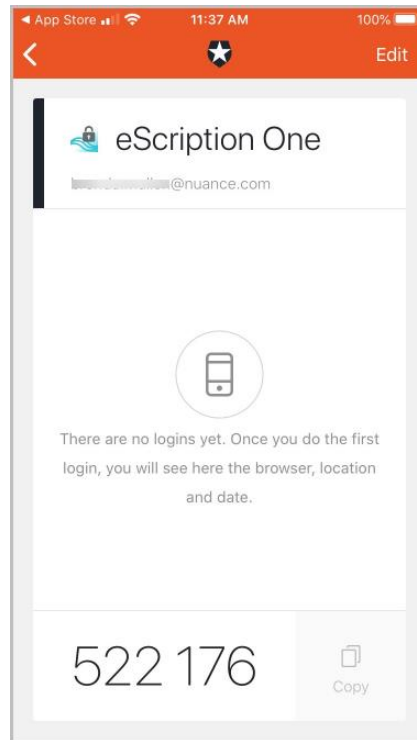
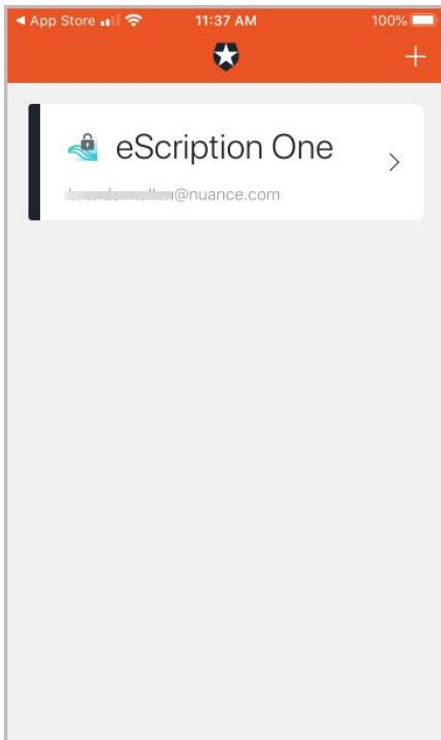
Step 3: Copy the Recovery Code

After scanning the QR code, you will receive a recovery code (in InCommand). If you need to log in and do not have your device, you can paste or enter this code to access InCommand. Copy the code and keep it somewhere safe.

Click the check box indicating that you have recorded the code, then click **Continue**.



You now have an account to which a notification request will be sent each time you log in. The email on your account will be the email listed for you on the Transcription Information or User Information screen in InCommand.



You have successfully set up multifactor authentication. Remember to have your phone nearby when you log in from now on. See the next section for details.

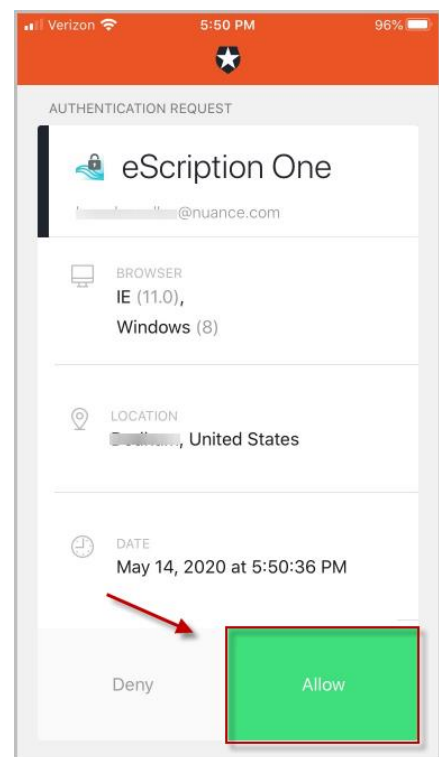
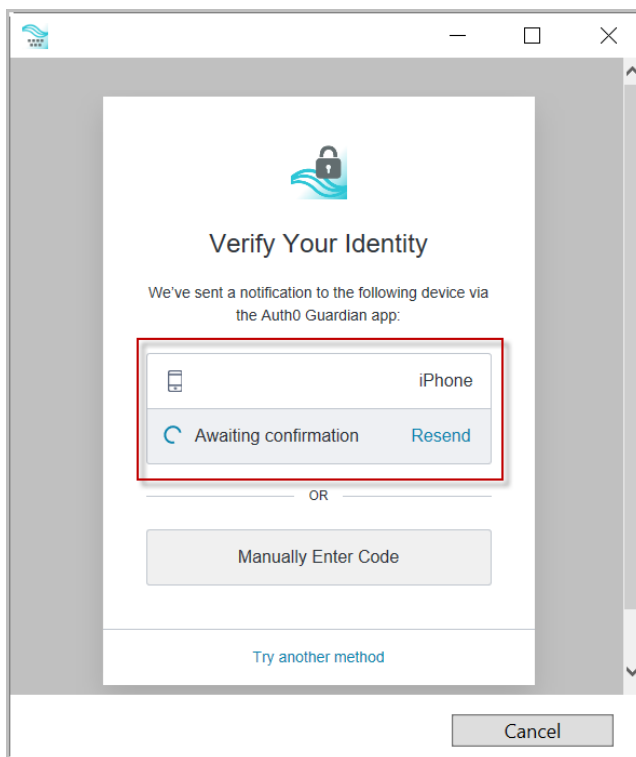
Logging in with Multi-Factor Authentication

Once you have completed the initial MFA setup process above, you will subsequently log in to eScriptation One apps as shown in the steps below.

1. Open the Guardian app.
2. In your eScriptation One app, enter your login credentials.

The Verify Your Identity screen opens, indicating that a notification has been sent to your phone and is awaiting confirmation.

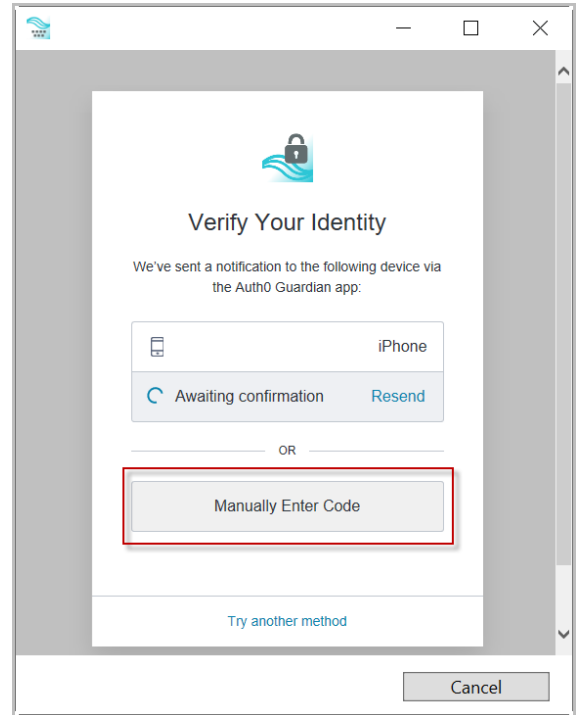
3. In the Guardian app, click **Allow**.



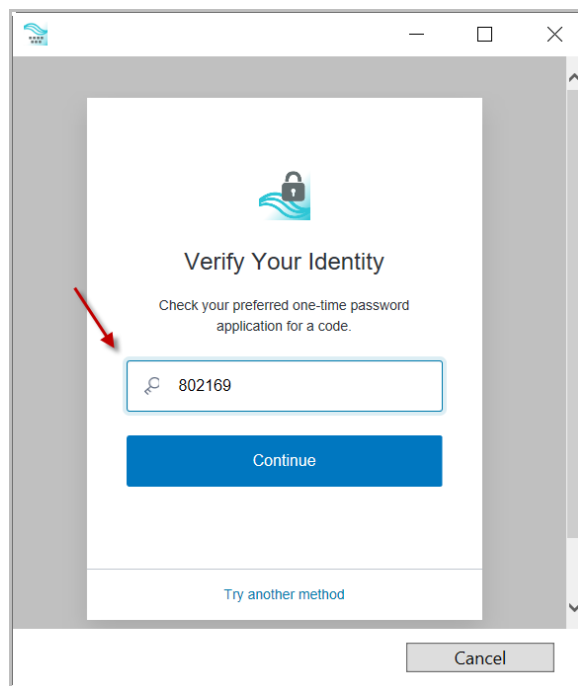
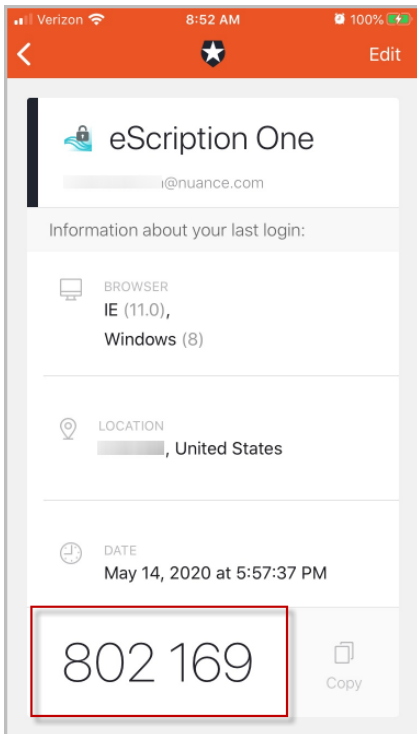
After successful authentication, you will automatically be logged into your eScriptation One app.

If you do not receive the notification, you can choose to have the notification resent, or you can manually enter the code at the bottom of the Guardian app (see below).

If you do not receive a notification, you can choose **Manually Enter Code**.



Enter the code appearing at the bottom of the Guardian app.



Click **Continue**. After successful authentication, you will automatically be logged into your eScription One app.

Resetting Multi-Factor Authentication

An option called **reset multi-factor authentication** has been added to the **Password and Security Options** screen (Maintenance> Transcriptionists> Edit 'transcriptionist'). This option allows transcription managers to reset MFA for users who cannot log in with MFA after having done so previously.

For this option to appear for the transcriptionist, the following conditions must be met:

- MFA is turned on for the company.
- MFA is turned on for the transcriptionist.
- The user has logged in at least once with MFA enabled.

Note: At this time, you must use the "reset multi-factor authentication" button **before** removing the entry from the Guardian app or uninstalling the Guardian app. Otherwise, you will need to contact support for assistance.

To do a reset:

1. Click the **reset multi-factor authentication** button.

The screenshot shows the 'Edit Setup for Transcriptionist' interface. The 'Password and Security Options' section is expanded, showing the following settings:

Setting	Value
Use Multi-Factor Authentication	<input checked="" type="checkbox"/>
InCommand Time-Out	15
Audio Playback Method	Play Dictations in Browser (secure)

A red box highlights the 'reset multi-factor authentication' button located to the right of the 'Use Multi-Factor Authentication' checkbox.

A pop-up confirmation window appears.

2. Click **Ok**. The reset proceeds and a new pop up appears stating that authentication has been reset.
3. Click **Ok**. The user can now begin MFA registration again.

Note: The 'reset multi-factor authentication' button remains on the Password and Security Options screen after a profile is reset.

Email Verification

Upon login, if the user has not already entered and validated an email address, a notification window will appear asking for an email address. This email address is used for the reset password process. After entering an email, a notification appears, indicating that a confirmation email has been sent to the email address entered. (You can choose not to enter an email, but will be prompted again on your next login.)

Welcome to the eS-One platform. Please verify the email address on your account by using the link below. This email address will only be used for forgot password requests.

[Verify Email Address](#)

This link will expire in 2 hours. If you did not request this confirmation, please contact support at 800-858-0080 or <https://www.escription-one.com/ticket/>.

Click on the link in the confirmation email to complete the verification process.

To edit the user email address, go to Maintenance> Transcriptionists> Transcriptionist Information. If the email address has previously been verified and is then edited, you will be prompted to verify the updated email address.

Phone 1	<input type="text"/>
Phone 2	<input type="text"/>
Fax	<input type="text"/>
E-Mail	<input type="text"/> ✓ verified

Resetting your Password

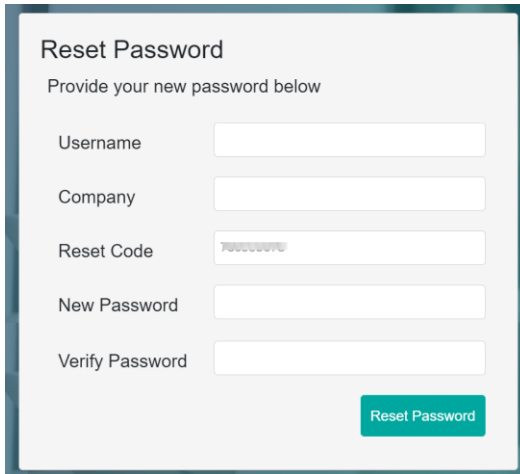
If you have forgotten your password, you can reset it using the steps below.

1. On the login screen, enter your Username and Company, then click [Forgot Password?](#).
2. On the 'Forgot Password' screen, click either the **Send Email** button or '[Have reset code?](#)' link (if you already have a reset code).

Username	<input type="text"/>
Password	<input type="password"/>
Company	<input type="text"/>
Forgot Password?	<input type="button" value="Log In"/>

Forgot Password	
Username	<input type="text"/>
Company	<input type="text"/>
Have reset code?	<input type="button" value="Send Email"/>

- If you choose **Send Email**, you must have a verified email address (see above). If so, an email will be sent to you with instructions and a link for resetting your password. Once you click the link, the 'Reset Password' screen appears with the reset code filled in. Enter the remaining information, then click the **Reset Password** button.



Reset Password
Provide your new password below

Username

Company

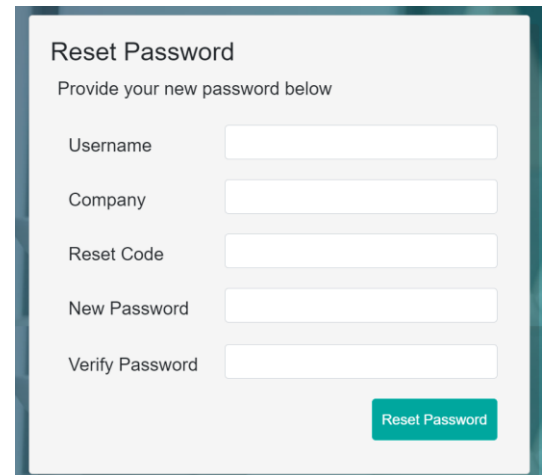
Reset Code

New Password

Verify Password

If you choose '[Have reset code?](#)', the 'Reset Password' screen appears without the reset code filled in. Enter the code and remaining information, then click the **Reset Password** button.

If you selected 'Send Email', you can also copy and paste the code from the email and paste it here.



Reset Password
Provide your new password below

Username

Company

Reset Code

New Password

Verify Password

Management

Summary

This tab displays information that is useful for the management of your transcription workflow.

News and Events Section

News & Events

Are we getting through to you?

Periodically, DeliverHealth uses the InCommand system to email MTSO owners. Along with service disruption alerts and product upgrade notifications, we also share information about company news, platform features, sales support and product enhancements. Please include notifications@escription-one.com on your safe list to make sure these valuable messages arrive in your inbox and are not routed to your junk folder or filtered as spam.

Transcription Summary Section

In Queue

This summarizes the number of transcriptions that are waiting to be typed in either transcription status or a QA status. It also warns of any dictations that are very old and should be either typed or invalidated.

Welcome

There Are a Total of [451 Dictations](#) In The Queue Awaiting Transcription and Quality Assurance.

⚠️ 40 CHECKED OUT.

🔴 You HAVE 319 DICTATIONS OVER 30 DAYS OLD. PLEASE TRANSCRIBE THE DICTATIONS OR INVALIDATE THEM.

Transcription	348
QA Level 1	32
QA Level 2	2
QA Level 3	12
QA Level 4	57

+ Pools with Active Transcription

+ Last Dictations

+ Pools With No MT Assigned

Pools with Active Transcription

This section gives an overview of which user pools within which clients have work to be done. It gives the number of jobs and the total length of the jobs so you may assign MTs as needed.

Pools With Active Transcription

Client	AEMQA
Category	AN USER USER POOL
User Pool	auser
	30 jobs, 1 hour(s) and 20 minute(s)

Last Dictations

This section gives the date and time of the last dictation received by the system for each client.

Last Dictations				
Client	Transcription	User	Doc Type	Date Received
ESODemo	233730280	Demonstration User	Structur	5/18/21 5:22 PM
Test00	233613322	Test User	Chart	5/17/21 9:42 AM

Pools With No MT Assigned

This section gives you a list of clients and pools where there are no transcriptionists assigned to work.

Pools With No MT Assigned

Client **ABAC**

Category *DEFAULT CATEGORY*

User Pool Default User Pool

Category *CAT 1*

User Pool Default Pool

User Pool GN User Pool

User Pool 1322

Category *TESt*

User Pool Default Pool

Outstanding Jobs

This tab shows the status of all jobs that have not been delivered to the client yet. This includes jobs that have not been typed at all as well as those jobs that have been typed but are currently in QA status. Transcriptions in the Outstanding Jobs tab are available to transcriptionists to download in InScribe based on their setup and the pool assignment of the work. ***

Management Maintenance InVision Client Maintenance Inquiry

Summary Outstanding Jobs Delivered Transcriptions Advanced Management Options

Client

Transcription ID

Patient ID Receipt

Patient Name

Document Type

Location

Pool Category

User Pool

Document Pool

Order Number

Account Number

Clinician

Transcriptionist

Date Received thru

Date Checked Out thru

Priority Status

Hours Old Hours Until Expiration

Use Client Time Zone Show Inactive

Comment Tags

Orders

Results Per Page

search

clear

Search Criteria

If you want to see all jobs that are currently in outstanding status, you can simply press the Search button with no search criteria selected. However, it may be necessary to limit your search results to specific criteria to find them more easily. After the criteria are entered, press the Search button. If you would like to clear out the criteria selected, then press the Clear button.

Client Name – This is a drop-down menu that includes all clients for which you can view transcriptions.

Note: Subsequent selection criteria may be dependent on selecting a Client Name first.

Transcription ID – Use this field to enter a single, specific transcription ID. Partial searches are not possible.

Receipt – Use this field to enter a single, specific Receipt Code. Partial searches are not possible.

Patient ID – Use this field to enter a single, specific Patient ID. Partial searches are not possible.

Patient Name – Use this field to enter a single, specific Patient Name. Partial searches are possible, for example, entering 'an' in the patient name field will return results with a last name of Anderson or a first name of Anita.

Note: Use the format Last Name, First Name or Last Name only when search by full names.

Document Type – When a client is selected, all document types appear in a drop-down menu for selection.

Location – When a client is selected, this is a drop-down menu for specific locations.

Pool Category – When a client is selected, this is a drop-down menu for pool categories. Different User Pools might be in different Pool Categories.

User Pool – When a client is selected, this is a drop-down menu for user pools.

Document Pool – When a client is selected, this is a drop-down menu for document pools.

Order Number – Use this field for a single, specific Order Number.

Account Number – Use this field for a single, specific Account Number.

Clinician – When a client is selected, this is a drop-down menu for dictating clinicians.

Transcriptionist – This is a drop-down menu for specific transcriptionists. Files will be found that are currently checked out to the typist selected or where the typist selected was the last person to perform work on the file.

Date Received – This pair of fields allows you to search for files that were received by the system during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date by calendar. Time can also be specified using the sliders for Hour and Minute.

Date Checked Out – This pair of fields allows you to search for files that were checked out by an MT during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date by calendar. Time can also be specified using the sliders for Hour and Minute.

Priority – This drop-down menu will let you select a specific priority.

Status – This drop-down menu will let you select a specific status, such as Transcription, QA1, etc.

Hours Old – This drop-down menu will let you search for files that are older than the selected number of hours.

Hours until Expiration – This field allows you to search for files that are due in a time less than the number of hours input.

Use Client Time Zone – This check box will display times based on the client's time zone.

Show Inactive – This check box will allow inactive clients, clinicians, and document types to be selectable in their respective drop-down menu.

Comment Tags – This drop-down menu allows you to select a specific Comment Tag.

Results per page – This drop-down menu allows you to specify the number of results you would like shown on each page.

Total Jobs: 145

Drag a column header here to group by that column

<input checked="" type="checkbox"/>	Actions	i	Client	Transcription ID	Clinician
-------------------------------------	---------	---	--------	------------------	-----------

The section above the results can be used to sort the results with different criteria, instead of the default. Simply drag columns here to sort the results in any order you prefer.

Results List

Total Jobs: 17												Page 1 of 1
Drag a column header here to group by that column												
<input checked="" type="checkbox"/>	Actions	i	Client	Transcription ID	Clinician	Document	Date Received	Date Checked Out	Transcriptionist	Priority	Status	Hours Old
<input type="checkbox"/>	🔊	🗨	AEMQA	211280374	auser auser	CrystalQ	4/10/2020 4:53 PM			2	Transcription	811
<input type="checkbox"/>	🔊	🗨	AEMQA	211292555	auser auser	XA5	4/12/2020 12:33 AM			2	Transcription	780
<input type="checkbox"/>	🔊	🗨	AEMQA	211791482	auser auser	Bullet	4/29/2020 1:46 PM			2	Transcription	358
<input type="checkbox"/>	🔊	🗨	AEMQA	211257683	auser auser	XA5	4/9/2020 7:21 PM			4	Transcription	833
<input type="checkbox"/>	🔊	🗨	AEMQA	211281150	auser auser	XA5	4/10/2020 5:24 PM			4	Transcription	811

Results by default are sorted by the order of priority and then due time. For example, stat dictations (priority 2) appear higher on the list than standard priority dictations (priority 4). Within each priority, jobs that are due sooner appear higher in the list.

Note: The following columns can be toggled using the drop-down menu to show different information

Date Dictated <--> Date Received <--> Date checked out

Priority <--> Is Overdue

All other columns allow for searching by way of entering information into the box below the column header.

The following actions can be taken when clicking on a transcription:

Check Box – Allows you to place a check in the box to select specific files for use with the Modify, Check In, Status, and Pools buttons (see sections below).



Play Icon – Opens the dictation sound file to be played with your default media player.



Comment Icons – Shows you any comments or comment tags that are in a transcription and allows you to edit comments or tags.

Note: Transcriptions with comments are denoted with different colored comment icons.

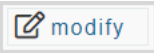


User Pool, User Pool Category, & User Pool Category ID Columns – These columns, when clicked, show you the current pool assignments of the transcription in a pop-up window. Additionally, any transcriptionists or outsource companies that are assigned to these pools are listed.

U-Cat	U-Pool	D-Pool
1	1	1

All other Columns not listed above – Clicking anywhere on the transcription record in the result list except for the specific sections above will open the Dictation Information in a new window (see section below).

Modify



Clicking the Modify button allows you to change the following information for selected or all transcriptions:

Note: Some fields are only available when you have selected a Client before performing the search.

Modify the settings for selected jobs in your last search ✕

Transcriptionist	Leave As Is	▼
Priority	Leave As Is	▼
STAT	Leave As Is	▼
Clinician	Leave As Is	▼
Document Type	Leave As Is	▼
Location	Leave As Is	▼

modify
cancel

Transcriptionist – Change to whom the job is checked out.

Priority – Change the priority of the transcription.

STAT – Mark the transcription as stat for billing purposes.

Clinician – Change the dictator on the transcription.

Document Type – Change the document type of the transcription.

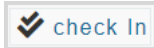
Location – Change the location of the transcription.

After making the necessary changes with the drop-down menus, the buttons on the bottom side are used for the following:

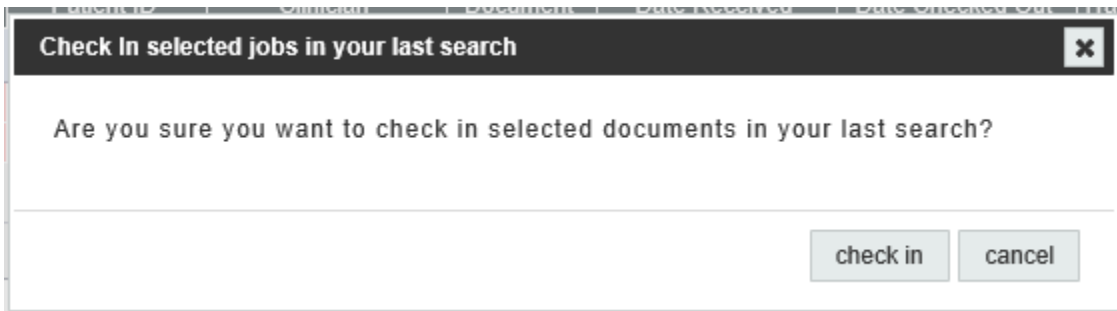
Modify – This will update transcriptions that have been selected with the Check Box in the left-most column (see search results section above) with the new information chosen in the drop-down boxes.

Cancel – This will cancel out of the Modify window without making any changes.

Check In



Clicking the Check In button will check in all jobs so they are available to typists. This will take away the job from the transcriptionist that currently has the job checked out.

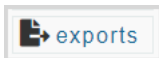


After clicking the Check In button, a new window opens, the buttons on the bottom are used for the following:

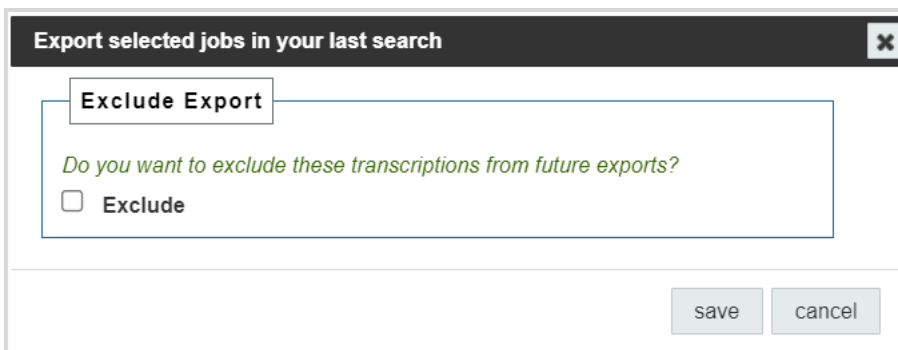
Check In – This will check in transcriptions that have been selected with the Check Box in the left-most column (see search results section above)

Cancel – This will cancel out of the Check In window without making any changes.

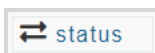
Exports



Checking the Exports button allows you to exclude selected jobs from future exports.



Status



Clicking the Status button allows you to change the status of the transcription. The status can be changed to the following choices:

Transcription, QA Level 1–5, Outsource QA, Client QA, ShadowScribe – The file will be changed to the selected status. Only typists who are setup as the selected status will be able to work on the job.

Invalidate –The job will be moved to Invalid status in Delivered Jobs. This is similar to deleting the job.

Deliver to Client – The job will be delivered to the client.

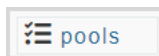
Note: You cannot deliver jobs that have not been typed yet.

After making the necessary changes with the drop-down menu, the buttons on the bottom are used for the following:

Change – This will update transcriptions that have been selected with the Check Box in the left–most column (see search results section above)

Cancel – This will cancel out of the Status window without making any changes.

Pools



Clicking the Pools button allows you to change the following information for selected or all transcriptions:

Note: The Pools button is only available when you have selected a Client before performing the search.

Pool Category – If the client has multiple User Pools categories, then this drop-down menu will allow you to select the appropriate category.

User Pools – Select one or more check boxes for the User Pools to which the transcription(s) should be re–assigned.

Document Pools – Select one or more check boxes for the Document Pools to which the transcription(s) should be re–assigned.

Note: Transcriptions must have at least one check box in each User Pools and Document Pools to be downloaded by transcriptionist.

After making the necessary changes with the check boxes, the buttons on the bottom are used for the following:

Update – This will update the transcriptions that have been selected with the Check Box in the left–most column (see search results section above)

Cancel – This will cancel out of the Pools window without making any changes.

Dictation Information (Outstanding Job)

Clicking on a transcription in the results list in the appropriate place (See Results List Section) opens a new window called the Dictation Information window. This window contains both detailed information about the transcription as well as methods to edit information which could affect how it is checked out by transcriptionists.

Priority	4 (Normal) ▾	Transcriptionist	Aarneson, Arnold (aa) ▾
Location	Main ▾	Document Type	Chart - Chart Note ▾
STAT	<input type="checkbox"/>	Marked for Review	<input type="checkbox"/>
Clinician	User, Demonstration ▾	Status	Transcription ▾
Client	ESODemo		

Priority – This shows the current priority of the transcription. Use the drop-down menu to change to a different priority.

Location – This shows the current location of the transcription. Use the drop-down menu to change to a different location.

STAT – If this check box is checked, then the transcription is marked as Stat. You can check or uncheck this box to change this.

Clinician – This shows the current dictating clinician for the transcription. Use the drop-down menu to change to a different clinician.

Client – This shows what client the file belongs to.

Transcriptionist – This shows the transcriptionist that currently has the file checked out. Use the drop-down menu to change to a different transcriptionist or to check it back in.

Note: Checking in a job this way, does not notify the transcriptionist until she communicates with the server next. It is usually helpful to let him/her know if you have re–assigned a job.

Marked for Review – This will toggle whether the file will go to the Review folder in InQuiry.

Note: Depending on the settings for the Client, some files might not be able to go to Review or some files might always go to Review despite this setting.

Document Type – This shows the current document type for the transcription. Use the drop-down menu to change to a different document type.

Status – This shows the status of the dictation (Transcription, QA Level, Outsource QA, ShadowScribe, Invalidate, Client QA).

Document Information
[advanced view](#)

Client: *ESODemo* ?

Patient ID:

Account Number:

Full Name:

Gender:

Birthdate:

Appointment Date:

Dictator: *Demonstration User (Admin)*

Nuance Specialty:

Document Type: *Chart*

Nuance Document Type: *Cardiology*

Location: *Main*

Billing Code:

UF2:

UF3:

UF4:

UF5:

Legacy Order:

Admit Date:

Discharge Date:

Orders:

Document Information – This contains any demographic information that is known about the transcription.

Pools

User Pools

Pool Category Default Category ▼

Another Dictating Pool

Default User Pool

Document Type Pools

!@#-Doc Pool

11

12

121 < cc >
 <c

Default Document Pool

Second Doc Pool

z-pool

User Pool – This shows the current User Pool to which the transcription is assigned. Use the check boxes to change the User Pool if needed. If there are Pool Categories available, the drop-down menu can be used to select the appropriate category.

Document Type Pools – This shows the current Document Type Pool to which the transcription is assigned. Use the check boxes to change the Document Type Pool if needed.

Activity

All times are in the time zone of "Central Standard Time" Refresh View Archived

	Date	Action	Action By	Type
	7/14/20 2:10 PM	Received	Admin	Inquiry User
	7/15/20 10:46 AM	Checked Out	aa (Transcription)	Transcriptionist
	7/15/20 11:15 AM	Checked In	aa (Transcription)	Transcriptionist
	7/16/20 11:13 PM	Checked Out	aa (Transcription)	Transcriptionist
	7/17/20 1:10 AM	Checked In	aa (Transcription)	Transcriptionist
	7/17/20 7:15 AM	Checked Out	aa (Transcription)	Transcriptionist
	7/17/20 8:10 AM	Headset Updated	aa (Transcription)	Transcriptionist

Activity – This is a log of what events have happened to the transcription and at what time the event occurred.

Delivered Transcriptions Tab

Emdat		EDEMO Management		EDEMO Maintenance		EDEMO InVision		EDEMOCCLNT Client Maintenance		Inquiry	
Summary		Outstanding Jobs		Delivered Transcriptions		Advanced Management		Options			
<i>This feature can only be used for clients where your transcription company is the base company. You will not be able to view transcriptions where you were an outsourced transcription company.</i>											
Client	Select a Client			Receipt		Clinician	Any				
Transcription ID		Receipt				Transcriptionist	Any				
Patient ID		Patient Name				Date Received			thru		
Document Type	Any					Date Delivered			thru		
Location	Any					Date Action			thru		
Action User	Any					Use Client Time Zone	<input type="checkbox"/>		Show Inactive	<input type="checkbox"/>	
Action Performed	Any					Exclude Invalids	<input type="checkbox"/>				
Current Status	Any					Comment Tags	Any				
Order Number						Orders					
Account Number						Results Per Page	50				

This tab shows the status of all jobs that have been delivered to the client. This includes any jobs that are invalidated (even those that were invalidated prior to being typed).

Search Criteria

In order to retrieve any search results, you must first enter search criteria. After the criteria are entered, press the Search button. If you would like to clear out the criteria selected, then press the Clear button.

Note: It is mandatory to enter a Client Name before any other search criteria may be selected or a search can be performed.

Client Name – This is a drop-down menu that includes all clients for which you are able to view transcriptions.

Transcription ID – Use this field for a single specific transcription ID.

Receipt – Use this field for a single specific Receipt Code.

Patient ID – Use this field for a single specific Patient ID.

Patient Name – Use this field for a single specific Patient Name.

Note: Use the format First Name <Space> Last Name or Last Name only.

Document Type – This is a drop-down menu for specific document types.

Location – This is a drop-down menu for specific locations.

Action User – This is a list of users for the chosen client. This is used to search for actions performed by a specific user appearing in the activity log.

Action Performed – This is used to search for a specific action appearing in the activity log.

Current Status – This is a list of statuses in the workflow that the transcription can be in. This includes each of the workflow folders, completed from workflow, and invalid statuses.

Order Number – Use this field for a single, specific Order Number.

Account Number – Use this field for a single, specific Account Number.

Clinician – This is a drop-down menu for dictating clinicians.

Transcriptionist – This is a drop-down menu for specific transcriptionists. Files will be found that were last checked out by the selected typist.

Date Received – This pair of fields allow you to search for files that were received by the system during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date by calendar.

Date Delivered – This pair of fields allow you to search for files that were delivered during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date by calendar.

Date Action – This pair of fields allow you to search for files that have an action in the activity log during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date by calendar. The Time slider at the bottom allows you to specify a time range as well.

Use Client Time Zone – This check box will display times based on the client's time zone.

Show Inactive – This check box will allow inactive clients, clinicians, and document types to be selectable in their respective drop-down menu.

Exclude Invalids – This check box will limit the search results to only valid Transcriptions.

Comment Tags – This drop-down menu allows you to select a specific Comment Tag.

Orders – Use this field for a single, specific Order.

Results Per Page – This drop-down allows you to specify the maximum results that will appear on a single page.

Sorting and Grouping – Typically, results of searches in the Delivered Jobs tab are not displayed in any specific order.

Total Jobs: 18

⏪ ⏩ Page 1 of 1 ⏪ ⏩

Drag a column header here to group by that column


Drag the header of a column into this section to Group by that column. Multiple columns can be used to group and the order left to right determines the grouping order as well.

To reset, drag and drop the heading back to the search results columns.


Filtering

Status	Client	Patient ID	Patient Name	Author
Any				

Use the fields below the column headers to further filter your search list by the typed information.

Clear Filters 















- Use the Clear Filter button to remove any filtering that has been applied.

Refresh 

- Use the refresh button to refresh the results list.

Results List

Because transcriptions are saved indefinitely on the server, some search criteria may retrieve many results. Searches are limited to only 1000 results. Results are by default displayed in no particular order.

☑	Actions ⓘ	Client	Transcription ID	Receipt	Clinician	Document	Length	Status
<input type="checkbox"/>	 	ESODemo	181745987	31151310		Exam	00:00:20	In Search All
<input type="checkbox"/>	 	ESODemo	169333592	10052230		ClinNote	00:05:11	In Search All
<input type="checkbox"/>	 	ESODemo	122239710	17838494	Nuance V. Jacoby	Chart	00:01:08	Invalid
<input type="checkbox"/>	 	ESODemo	131007105	17947358	Nuance V. Jacoby	NuProg	00:00:58	Invalid
<input type="checkbox"/>	 	ESODemo	188101671	5961819	Demonstration User	FUP	00:00:10	Invalid
<input type="checkbox"/>	 	ESODemo	185415321	1551674	Nuance V. Jacoby	NuProg	00:05:26	Invalid
<input type="checkbox"/>	 	ESODemo	207410932	1639146	Demonstration User	CDoc01	00:00:08	In Search All

Note: You can further filter any results using the input boxes beneath the headings. Blank boxes allow you to enter any text of your choosing and drop-downs will allow you to choose from the available options (such as a specific date).

The following actions can be taken when clicking on a transcription:

Check Box – Allows you to place a check in the box to select specific files for use with the Status button (see section below).



Play Icon – Opens the dictation sound file to be played with your default media player.

Note: Dictations are only saved for 9 months.



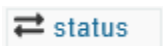
Comment Icons – Shows you any comments or comment tags that are in a transcription and allows you to edit comments and tags.

Note: Transcriptions with comments are denoted with a green icon, blank comments have a gray icon



All other Columns not listed above – Clicking anywhere on the transcription record in the result list except for the specific sections above will open the Transcription Information in a new window (see section below).

Status



Clicking the Status button allows you to change the status of the transcription. The status of the transcription determines where the job is in the workflow. The status can be changed to the following choices, though folder names may vary as they are determined by each client:

Note: The folder(s) the document moves to will depend on the access rights of the document type and location and the active status of the folder(s). If a transcription cannot go into the folder selected, it will go to the next folder in the workflow where the folder is active, and the document type and location have access to that folder.

Review, Marked for Review, etc.– The file(s) will move to the Review folder(s).

Preliminary, e-signature, etc. – The file(s) will move to the Preliminary folder.

Final 1 and/or 2 – The file(s) will move to the Final folder(s).

Workflow Completed/Search All – The file(s) will be removed from the active workflow and placed in the archive.

Invalidated – The file(s) will be removed from the active workflow and moved to Invalid status. This is similar to deleting the job.

Return to QA – The file(s) will be put back into Undelivered status. It will appear in InCommand under the Outstanding Jobs tab at the highest level of QA available to the client.

Note: The job will have the user and document pool of the current dictator and document type. It is recommended to use the outstanding jobs tab to ensure the file can be checked out by the correct typist.

Transcription Information (Delivered Job)

Clicking on a transcription in the results list in the appropriate place (See Results List Section) opens a new window called the Transcription Information window. This window contains both detailed information about the transcription as well as a method to edit the status or re-export the file.

Current Status – This shows the current status of the transcription. To change to a different status, use the drop-down menu and then press Save. See the Status section above for more information.

Price – This shows the line count and price of the file for the client. To charge a specific amount for this document, enter an amount into this field and then press Save.

last modified by jhansard on 9/9/20 12:24 PM save view play export previous next close

Price \$0.00 *(Original Price: \$0.2340 - 1 lines, 0 qualified text)*

Modifiers **DOC:0.004**

Save – This saves the transcription information and exit.

View – This opens a new window to view the transcription document.

Play – This opens a window that will allow you to play the dictation associated with the transcription.

Export – This opens a popup window that will allow you to choose Rules and Delivery Method/Format to export the job. You can also exclude a job from future exports by checking the appropriate Exclude box.

Export Now

To push an export through now, select a rule and delivery method below. The transcription must meet the selected Rule to Export.

Rule

Delivery Method/Format

Rule Test Status **Fail**

Field Name	Field Value	Status	Reason
Excluded from future exports	No	✓ Pass	
Workflow	Preliminary	✗ Fail	Document has not passed any of the selected workflow triggers
Document Types	Chart Note	✗ Fail	Document Type not included
Locations		✗ Fail	No Location
Dictating User	upload_fname996 upload_lname996, Suffix:996	✗ Fail	User not included
Authenticating User		✗ Fail	No additional authenticator(s)

Choosing any rule and delivery method will allow you to test the distribution by using the test button. This feature will allow you to determine if the proper rules are setup for the job to distribute. If it shows status Failed, a reason will be provided on why it does not meet the current Rule and Delivery Method selection.

Previous – This will show load the Transcription Information for the previous dictation in the search results.


Next – This will show load the Transcription Information for the next dictation in the search results.

Close – This closes the Transcription Information screen.

Document Information

Client: *ESODemo*

Patient ID: [advanced view](#)

Account Number: 

Full Name <Patient Name>

Gender:

Birthdate:

Appointment Date:

Dictator: *Demonstration User (Admin)*

Nuance Specialty:

Document Type: *Chart*

Nuance Document Type: *Cardiology*

Location: *West*

Billing Code <User Field 1>

UF2 <User Field 2>

UF3 <User Field 3>

UF4 <User Field 4>

UF5 <User Field 5>

Legacy Order <Order Number>



Admit Date <Date Admitted>


Discharge Date <Date Discharged>

Orders:


Document Information – This shows the current demographic information of the file. This includes the clinician, patient’s information, document type, location, user field information, and date information. Click the red question mark to show/hide help text. The Advanced View link in the upper right-hand corner will toggle an advanced view with more information for each section.

Activity

All times are in the time zone of "Central Standard Time" Refresh  View Archived 


	Date ▲	Action	Action By	Type
	8/25/20 11:23 AM	Received Copy	system (Transcription)	Transcriptionist
	8/25/20 11:23 AM	Delivered	system (Transcription)	Transcriptionist
	8/25/20 11:31 AM	Viewed	choward (Transcription)	Transcriptionist
	8/25/20 11:32 AM	Viewed	Admin	Inquiry User

Activity – This is a log of what events have happened to the transcription by whom and at what time the event occurred. You can sort by each column ascending or descending by clicking on the column header.

 Any entry in the Activity section with this icon in the far-left column can be clicked on to load the revision history. This will open a new window with pertinent sections, such as Document Information, Patient Information, and Document Body. Expanding a section will show you what information was changed and who changed it.

Workflow Information	
Date Dictated:	8/13/20 12:25 PM
Date Dictation Received:	8/25/20 10:56 AM advanced view
Date Transcribed:	8/25/20 11:23 AM ?
Date Delivered:	8/25/20 11:07 AM
Complete From Marked For Review:	8/25/20 11:07 AM
Complete From Admin Review:	8/25/20 11:07 AM
Complete From Preliminary:	8/25/20 11:07 AM
Complete From Final:	8/25/20 11:07 AM
Send To EHR From Final 2:	N/A
Invalidated:	x

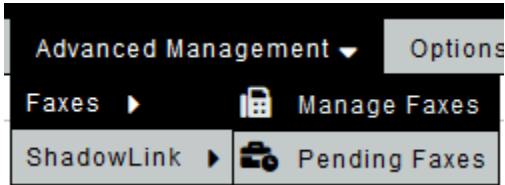
Workflow Information – This section will show you the date and time of each workflow change.

Prior Versions of Transcription Body			
Action i	Delivered	Date Replaced	Version Date questions about versioning?
 view	✓	8/25/2020 12:32:27 PM	8/25/2020 12:23:02 PM

Prior Versions of Transcription Body - Prior Versioning is a feature that allows an InQuery user to choose a specific version of the transcription body to restore over the current version. Click on the View icon will show you the previous transcription and allow you to restore the previous version. The questions about versioning link will provide you detailed information on this feature.

Advanced Management Drop-down Menu > Faxes

This drop-down menu allows you to access advanced management for Faxes.



The sub-menu option for Manage Faxes is used to search through TIDs which have already gone past the fax trigger and are either queued to fax or have completed faxing (either as a success or failure).

Pending Faxes are those where the Transcription has not been triggered yet from the workflow or in some cases when the transcription will be faxed but has not queued yet.

Search Criteria

Both the Manage Faxes and Pending Faxes sections share most of the same search criteria. The Manage Faxes criteria are shown below. Some options are not available in the Pending Faxes screen because they are not relevant.

Client	Any	▼	Fax Number	<input type="text"/>
Recipient Name	<input type="text"/>		Transcription ID	<input type="text"/>
Location	Any	▼	Status	Any
Date Faxed	<input type="text"/>	thru	<input type="text"/>	▼
Error Description	Any	▼	Dictator	Any
Patient ID	<input type="text"/>		Last Signature	Any
Patient Name	<input type="text"/>		Results Per Page	50
				▼

Use the Search Criteria to find the statuses of Faxed Transcriptions for a given Client. After the criteria are entered, press the Search button. If you would like to clear out the criteria selected, then press the Clear button.

Client Name – This is a drop-down menu that includes all clients for which you are able to view transcriptions.

Note: Many subsequent selection criteria are dependent on selecting a Client Name first.

Fax Number – Search by a specific Fax Number.

Recipient Name – Search by a Fax Recipient's name. You can enter first or last name in this field.

Transcription ID – Use this field to enter a single, specific transcription ID.

Location – When a client is selected, this is a drop-down menu for specific locations.

Status – This drop-down menu will let you select a specific status, such as Queued, Failed, Succeeded or Cleared.

Date Faxed – Search a date range of fax dates.

Dictator – When a client is selected, this drop-down menu is used to select a specific dictator.

Error Description – Use the pull-down menu to search through specific errors that could cause faxes to fail.

Last Signature – When a client is selected, use this pull-down menu to search by the last authenticating clinician on a fax TID.

Patient ID – Use this field to enter a single specific Patient ID.









Patient Name – Search by a specific Patient Name.

Results per Page – Select how many results should show in each page of the result list.

Results List

Total Jobs: 423 Page 1 of 9 Choose Columns Clear Filters Refresh

Drag a column header here to group by that column

<input checked="" type="checkbox"/>	Actions	Status	Client	Author	Fax Number	Error Description
		Any				
<input type="checkbox"/>	   	Failed	ESODemo	!1S_!<9@#D !2U_>&%\$^0)(1	1111111111	Error Detected on Line
<input type="checkbox"/>	   	Failed	ESODemo	!1S_!<9@#D !2U_>&%\$^0)(1	1111111111	Error Detected on Line

The results of the search performed can be sorted, grouped, customized, and filtered using the functions of the table.

Grouping

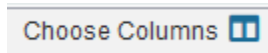
Total Jobs: 18 Page 1 of 1

Drag a column header here to group by that column

Drag the header of a column into this section to Group by that column. Multiple columns can be used to group and the order left to right determines the grouping order as well.

Ordering – Click on the headers available to sort the list ascending or descending.

Customizing



Use the Choose Columns button to select what columns should be displayed or hidden. Drag column headers out of or into the window that appears to add or remove columns in the results list. You can also change the orders by dragging the columns.

Available columns – Status, Client, Patient ID, Patient Name, Author, Fax Recipient, Fax Number, Original Fax Create Date, Date Faxed, Error Description, Current Workflow Folder, Signer, Tran Associate ID, Tran Fax ID, Transcription ID

Filtering

Status	Client	Patient ID	Patient Name	Author	Fax Recipient
Any					

Use the fields below the column headers to further filter your search list by the typed information.

Clear Filters - Use the Clear Filter button to remove any filtering that has been applied.

Refresh - Use the refresh button to refresh the results list.

Actions

Use the action buttons to perform management tasks on the Faxes in the results list. The below actions are available on the line item of a transcription and affect only that TID.

Note: Some of these actions will not be available depending on the status and configuration of the TID.



- Resend the fax.



- Open the Dictation Information window for the TID



- Download the TIFF image file that was faxed.



- Cancel the fax for (Pending Faxes section only).



- Edit the associate on the fax.

Use these buttons found to the right of the result list to perform an action to all transcriptions that have been selected using the check box



- Refax the selected faxes



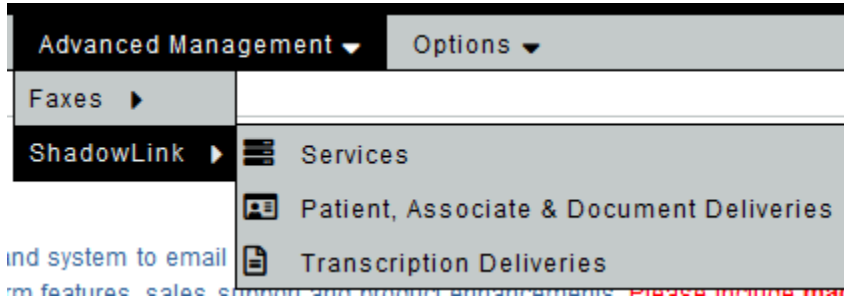
- Print the selected faxes



- Clear the selected faxes

Advanced Management Drop-down Menu > ShadowLink

This drop-down menu allows you to enter various sections of management for ShadowLink.



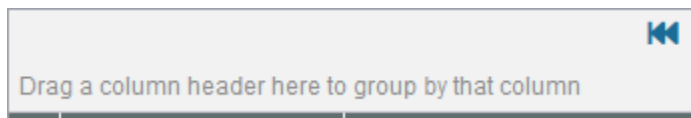
Services

This screen will show you all of the ShadowLink services your clients have installed and their statuses.

Page 2 of 2 Expand All Collapse All Choose Columns Clear Filters Refresh					
Drag a column header here to group by that column					
Client	Name	Machine	Last Activity	Last Logout	Status
TECHTRAIN	M Shadowlink				Disconnected
TECHTRAIN	R ShadowLink		6/11/20 2:52 PM	6/11/20 2:54 PM	Disconnected
TECHTRAIN	ShadowLink interface setup instructions		7/19/19 2:57 PM		Unresponsive

The results can be sorted, grouped, customized, and filtered using the functions of the table.

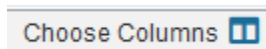
Grouping



Drag the header of a column into this section to Group by that column. Multiple columns can be used to group and the order left to right determines the grouping order as well.

Ordering – Click on the headers available to sort the list ascending or descending.

Customizing



Use the Choose Columns button to select what columns should be displayed or hidden. Drag column headers out of or into the window that appears to add or remove columns in the results list. You can also change the orders by dragging the columns.

Available columns – Client, Name, Machine, Last Activity, Last Logout, Status, IP Address, Is Active, Last Login, Login, Notification Email, Operating System, Service ID, ShadowLink Version

Filtering

Client	Name	Machine	Last Activity
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Use the fields below the column headers to further filter your search list by the typed information.

Clear Filters - Use the Clear Filter button to remove any filtering that has been applied.

Refresh - Use the refresh button to refresh the results list.

Patient and Associate Deliveries

Use this section to search for patient and associate files that have been sent from your clients through ShadowLink.

Transcription Deliveries

Use this section to search for Transcriptions that have been sent back to your clients through ShadowLink.

Search Criteria

Both the Patient and Associate Deliveries and the Transcription Deliveries sections use similar search criteria and will be detailed below.

Patient and Associate Search Criteria

Client	Any	Status	Any
Service	Any	Contains	<input type="text"/>
Delivery Type	Patient	Date Created	<input type="text"/> thru <input type="text"/>
Delivery Method	Any	Date Received	9/24/2020 12:00:00 AM thru 9/24/2020 11:59:59 PM
Format	Any	Date Completed	<input type="text"/> thru <input type="text"/>
Import Job ID	<input type="text"/>	Results Per Page	50

search clear

Transcription Delivery Search Criteria

Client	Any	Transcription ID	<input type="text"/>
Rule	Any	Status	Any
Service	Any	Date Created	<input type="text"/> thru <input type="text"/>
Delivery	Any	Date Rendered	<input type="text"/> thru <input type="text"/>
Format	Any	Date Retrieved	<input type="text"/> thru <input type="text"/>
Job ID	<input type="text"/>	Date Delivered	<input type="text"/> thru <input type="text"/>
		Results Per Page	50

search clear

Client – Use this drop-down menu to select a specific client.

Note: Many subsequent selection criteria are dependent on selecting a Client Name first.

Transcription ID – Search by a specific transcription ID.

Rule – Use the drop-down menu to limit your search to a specific ShadowLink 2 Rule. This is available after selecting a client.

Status – Use the drop-down menu to limit your search to a specific status of the Transcription Delivery such as Completed, Rendered, Delivery Error, etc.

Service – This drop-down menu allow you to select a specific ShadowLink 2 service. This is available after selecting a client.

Contains – Use this field to search through Patient and Associate Deliveries which contain a specific string of characters.

Delivery Type – Use this drop-down to change your search to either Patients to Associates.

Delivery Method – This drop-down menu allows you to select a specific Delivery Method of the Service that is selected for Patient or Associate Deliveries.

Delivery – This drop-down menu allows you to select a specific Delivery Method of the Service that is selected for Transcription Deliveries.

Format – This drop-down menu allows you to select a specific Delivery Format of the selected Service.

Job ID – Use this field to search by a specific Transcription Delivery Job ID.

Date Created – This pair of fields allows you to search for deliveries that were created during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date and time by calendar.

Date Received – This pair of fields allows you to search for deliveries that were received during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date and time by calendar.

Date Completed – This pair of fields allows you to search for deliveries that were completed during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date and time by calendar.

Date Rendered – This pair of fields allows you to search for deliveries that were rendered during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date and time by calendar.

Date Retrieved – This pair of fields allows you to search for deliveries that were retrieved during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date and time by calendar.

Date Delivered – This pair of fields allows you to search for deliveries that were delivered during the chosen date range. Dates can be typed in MM/DD/YYYY format or the calendar icon can be clicked to select the date and time by calendar.

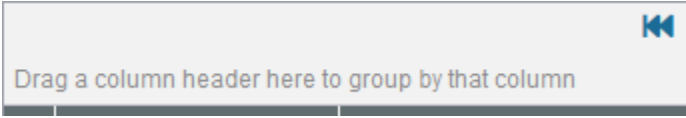
Results Per Page – Use this drop-down menu to select how many results you would like to see in the results list.

Results List

Total Jobs: 12												
Drag a column header here to group by that column												
☑	Actions	Job ID	TID	Client	Service Name	Delivery Method	Created	Rendered	Retrieved	Delivered	Status	Error
<input type="checkbox"/>		142001306	218598542	TestSnigTran	service1	trans del	9/20/20 8:24 AM	9/20/20 8:24 AM	9/21/20 7:21 AM	9/21/20 7:21 AM	Delivered	
<input type="checkbox"/>		142001557	218598734	TestSnigTran	service1	trans del	9/20/20 8:46 AM	9/20/20 8:46 AM	9/21/20 7:21 AM	9/21/20 7:21 AM	Delivered	

The results of the search performed can be sorted, grouped, customized, and filtered using the functions of the table.

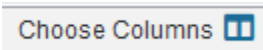
Grouping



Drag the header of a column into this section to Group by that column. Multiple columns can be used to group and the order left to right determines the grouping order as well.

Ordering – Click on the headers available to sort the list ascending or descending.

Customizing



Use the Choose Columns button to select what columns should be displayed or hidden. Drag column headers out of or into the window that appears to add or remove columns in the results list. You can also change the orders by dragging the columns.

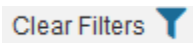
Available columns: Patient and Associate Deliveries – MTSO, Client, Service Name, Delivery Method, Created, Received, Completed, Status, Error, Format, Job ID, Name, Path, Service Login

Available columns: Transcription Deliveries – Job ID, TID, Client, Service Name, Delivery Method, Created, Rendered Retrieved, Delivered, Status, Format, Path, Service Login

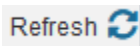
Filtering

Job ID	TID	Client	Service Name	Delivery Method

Use the fields below the column headers to further filter your search list by the typed information.



- Use the Clear Filter button to remove any filtering that has been applied.



- Use the refresh button to refresh the results list.

Actions

Use the action buttons to perform management tasks on the Deliveries in the results list. The below actions are available on the line item of a Delivery and affect only that item.

Note: Some of these actions will not be available depending on the Delivery Type of the line item.



- View detailed information about the Delivery.



- Reprocess the Delivery.



- Download the delivery file exactly how it was received or delivered.

Use these buttons found at the top of the result list to perform an action to all transcriptions that have been selected using the check box

Reprocess

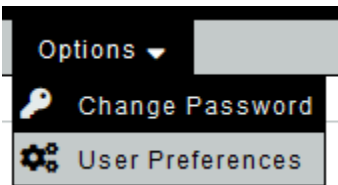
- Reprocess and clear errors for the selected Delivery items.

Clear Errors

- Clear Errors for the selected Delivery Items.

Options Drop-down menu

This drop-down menu will allow you to change your password or change user preferences.



Change Password

To change your password, fill in the fields with the appropriate information and then hit Submit. The password requirements configured for the company are shown at the top of the screen.

If the password does not meet these requirements, the screen will display which ones have not been met after the user presses the **Change Password** button.

Note: This will change your password for both InCommand and InScribe.

Change Password

Password Requirements:

- Minimum length
- No more than 128 characters
- Must contain at least one uppercase character
- Must contain at least one lowercase character
- Must contain at least one special character
- Must not contain the user's name

Provide your current and new password below

Username

Company

Current Password

New Password

Verify Password

User Preferences

View / Edit User Preferences [X]

Show Old Dictations Archive Alert

Show Empty Pool Alert

Auto-Refresh Outstanding Jobs List every 0 [v] minutes
This will make Outstanding Jobs List, and whatever search criteria were selected, perform the auto-search function. Select 0 to turn Off this functionality.

Always Maximize InCommand Windows
If checked, anytime a new Internet Explorer window opens, it will be automatically stretched to the maximum available screen size.

Email [] [v] verified
This email will be used by Nuance to reset forgotten passwords.

Time Zone (GMT-05:00) Eastern Time (US & Canada) [v]
Usually Time Zone is automatically identified upon login into InCommand system. This option allows to manually overwrite it.

ok cancel

Show Old Dictations Archive Alert – This option toggles an alert that pops up when you log into InCommand, warning that you have old dictations that are not transcribed.

Show Empty Pool Alert – This option toggles an alert that pops up when you log into InCommand warning that you have pools with no transcriptionist assigned.

Auto-Refresh Outstanding Jobs List every __ minutes – This will cause the results list in the Outstanding Jobs tab to refresh with up-to-date search results at the interval selected.

Always Maximize InCommand Windows – This option toggles the behavior of the InCommand window when you log in. When this option is checked, the InCommand window will increase in size to fill your monitor. When it is unchecked, InCommand will not re-size your window when you log-in.

Email – This email address will be used by the system to process the password reset initiated by you when clicking the “forgot password” link on the login page.

Time Zone – This options allows you to change your Time Zone. Usually Time Zone is automatically identified upon login into InCommand system.

Maintenance

Maintenance > Defaults

Management	Maintenance	InVision	Client Maintenance	InC
Defaults	Clients	EDEMO's Outsourced Work	Transcriptionists	
<p>+ Transcription Company Information</p> <p>+ Transcriptionist Password and Security Options</p> <p>+ Default Rate Information</p> <p>+ Fax Info Fields</p> <p>+ InScribe Workstation Policy</p>				

Transcription Company Information

This section includes demographic information about your transcription company, such as name, address, phone number.

- Transcription Company Information	
Company Name	Emdat Demo TEST
Company Code	EDEMO
Platform Code	eScription One
Address 1	1234 Main Street
Address 2	Suite 123
Address 3	Address3!
City	Warrenville
State	IL
Zip Code	12345
Country	USA
Phone	1234567890

Some notable fields are:

Company Code – This is an assigned code for logging into InScribe and InCommand and for setting up outsourcing relationships with other transcription companies. This is created when the transcription company is first entered into the eScription One system and cannot be edited.

Company Web Address – Use the format <http://www.webpage.com>. This address is used to route InQuiry users to your web address when they click on your logo.

Community Web Address – Use the format <http://www.webpage.com>. This address is used to route InCommand users to your web address when they click on your company name in the Global List.

InCommand Time Out – This is the maximum number of minutes of inactivity before InCommand automatically logs users out. The number entered here must be between 15 and 1440 minutes (1440 minutes = 24 hours).

Company Time Zone – Use this drop-down menu to specify the time zone that will be used when reports are run in the InVision tab.

Include MT Initials in Feedback – If this option is checked the grading MT's initials will display in the Score Card tab of Feedback in InScribe. The grading MT must have initials saved in their setup; please see Transcriptionists section below for more information.

Audio Playback Method – Use the drop-down menu to select the default dictation playback method for the transcription company. This setting can be overridden on the transcriptionist level.

Transcriptionist Password and Security Options

This section includes options for the passwords in InCommand and InScribe. Passwords in eScription One are not case sensitive.

- Transcriptionist Password and Security Options	
InCommand Time-Out	<input type="text" value="1440"/> minutes
Expiration Days	0 days
Minimum Length	4
History Count	0
Pattern Length	All characters allowed
Require Upper Case Characters	NO
Require Lower Case Characters	NO
Require Numerical Characters	NO
Require Special Characters	NO
Username Pattern Length	All characters allowed
Lock Account After Failed Login Attempts	3
Automatically Unlock Account	3

Some notable fields are:

InCommand Time-Out – This is the number of minutes of inactivity before the InCommand application times out. The minimum is 15 minutes; the maximum is 1440 (24 hours).

Expiration Days – This is the amount of time in days between the first log in and when the program will prompt a user to change passwords. 0 indicates no expiration.

Minimum Length – This is the minimum number of characters that the password must be. 0 indicates no minimum length.

History Count – This is the number of password changes required before a password can be reused. 0 means passwords can be reused immediately.

Pattern Length – This is the number of repeating characters that will cause a password to be invalid. 0 means any number of repeating characters.

Require Upper Case Characters – When checked, this option requires that passwords contain at least one upper case character. If case sensitivity is not turned on this requirement is satisfied by any letter.

Require Lower Case Characters – When checked, this option requires that passwords contain at least one lower case character. If case sensitivity is not turned on this requirement is satisfied by any letter.

Require Numerical Characters – When checked, this option requires that passwords contain at least one numerical character.

Require Special Characters – When checked, this option requires that passwords contain at least one non-alphanumerical character.

Username Pattern Length – Number of characters that exist in both the password and username in the same order that cause a password to be invalid. 0 means any number of repeating characters or numbers are allowed. 1 means that no characters from the username may appear in the password. Example: if Username Pattern Length is "3", the desired passwords of "jdo123", or "doe123" will not be accepted for a user named jdoe. There must be a value stated in this field.

Lock Account After Failed Login Attempts – The number of failed attempts before an account is locked. 0 means failed attempts will never lock an account.

Automatically Unlock Account – The number of minutes a user's account should remain locked before being automatically unlocked. 0 means accounts will never be automatically unlocked.

Temporary Password – This password will be used by default when creating a new transcriptionist using the New Transcriptionists Wizard. If a transcriptionist's password matches this password, they will be prompted to change it before being allowed to login.

Default Rate Information

This section includes defaults for billing information, which are used when new clients are created. All of these fields can be changed in the Client setup; the defaults just facilitate easier client setup.

- Default Rate Information

Default Billing Method Per Line ▾

Demographics

Include Demographic Characters

Body

Count Lines with Divisor

Line Divisor

Count Visible Black Characters Only

Include Formatting Characters

Per Line Settings

Enable Qualified Text

Qualified Text Rate

Base Rate

Stat Rate

ShadowScribe Rate (M*Modal)

ShadowScribe Edit Rate (M*Modal)

ShadowScribe Rate (Nuance)

ShadowScribe Edit Rate (Nuance)

Per Minute Settings

Base Rate

Stat Rate

ShadowScribe Rate (M*Modal)

ShadowScribe Edit Rate (M*Modal)

ShadowScribe Rate (Nuance)

ShadowScribe Edit Rate (Nuance)

Per Page Fax Settings

Fax Rate

Cover Page Rate

Other Settings

Prompt Users when Marking Dictations as Stat

Some notable fields are:

Note: Some options can only be selected if Count Lines with Divisor is turned on.

Count Lines with Divisor – If this is checked, then lines will be calculated by Character Counting Type. If it is unchecked, Gross Line Count is used.

Line Divisor – This divisor is used to determine how many characters compose a full line. The default is 65 characters per line.

Count Visible Black Characters Only – If this option is on, only characters that can be seen when printed will be added to the line count. If this option is off, then all characters including spaces, tabs, and formatting keystrokes will be counted.

Base Rate – This defines the base rate per line to be charged to the client. There can be modifiers that adjust this up or down based on specific criteria within the client setup.

Stat Rate – This defines the per line rate for stat jobs. There can be modifiers that adjust this up or down based on specific criteria within the client setup.

Enable Qualified Text – If this is turned on, then qualified text will be counted separately from standard text in the client billing reports.

Qualified Text Rate – This is the rate that will be charged to the client for lines of Qualified Text if “Enable Billing for Qualified Text” is turned on.

Fax Rate (per page) – This is the rate that will be charged to the client for each page (after the eScription One supplied cover page)

Fax Info Fields

These fields can be used to construct customized header and content.

- Fax Info Fields	
Call-Back Number	123456789
Cover Page Notes	

InScribe Workstation Policy

The options in this section help define workstation policy provisioning.

- InScribe Workstation Policy	
Enable Workstation Policy	<input type="checkbox"/>
Firewall Requirement	Not enforced
Anti-Virus Requirement	Not enforced
Anti-Spyware Requirement	Not enforced
Domain Name	
IP Subnet	
Motherboard serial number	
BIOS serial number	

Maintenance > Clients

Client List

This box lists all clients for which your company does transcription. Select a client and then click one of the links below the box to go to that maintenance section. The check boxes below the list allow you to include inactive clients or relationships. Inactive clients appear in gray and clients with inactive relationships appear in red.

If a client is outsourced to your company, the originating transcription company will be listed in parentheses. You cannot perform any maintenance on these clients.

- 01TEST - 01Test
- 02TEST - 02Test
- 03TEST - 03Test
- ABCD - abc
- ABCM - ABC Medical Center
- ABMC - ABM Clinic
- ACLIENT - Client A
- AEMQA - Emdat QA Testing Client
- AEMTR - Emdat ETRAIN Training Client

Show Inactive Relationships

Show Inactive Clients

[+ Add New Client](#)

[👤 Edit Relationship with 01Test](#)

[👤 Inactivate Relationship With Client 01Test](#)

[👤 Outsource 01Test to Another Company](#)

[⚙️ Enter Client Maintenance for 01Test](#)

[📄 Enter Inquiry for 01Test](#)

[📷 Upload Client Image for 01Test](#)

[💰 Update InTouch Rates for 01Test](#)

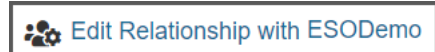
[📄 Map Transcription Copies for 01Test](#)

Add New Client

This link opens the Add New Client Wizard in a new window. Clients must have unique Client Names across the eScription One platform. Other than the Client Name, the options selected within this wizard can be modified within the client relationship and client maintenance. Please see the Client Relationship and Client Maintenance sections for more information about specific fields.

[+ Add New Client](#)

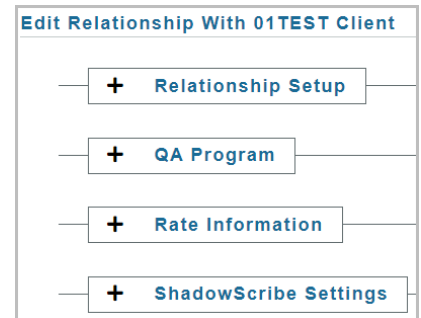
Edit Relationship with <Selected Client>



This link opens the client relationship maintenance for the client that is selected in the client list. Settings for the QA and rate information are found within this section.

Relationship Setup

Options in this section only affect your Transcription Company. They do not get passed through to the Outsource Relationship.



- Relationship Setup	
Status Levels	5 Levels of QA
Automatic dictation check in	None
Mark Text from Prior Transcriptions as QT	<input checked="" type="checkbox"/>
Enable Retrieve and Correct	<input checked="" type="checkbox"/>
Enable Client Feedback	<input checked="" type="checkbox"/>
Can Keep Work Local	<input checked="" type="checkbox"/>

Status Levels – This defines the maximum level of QA that can be reached when typists select to promote a job to QA within InScribe. Select the maximum level of QA your MTSO performs for this Client. The default selection, 'Transcribed Only', means that your MT cannot send the transcription to any level of QA. If a job is at this level, and the typist selects to send it to QA, it will deliver to the client instead.

Automatic dictation check in – Use the drop-down menu to select the maximum amount of time a typist can have a job checked out before the system automatically checks it back in to make it available to other typists.

Mark Text from Prior Transcriptions as QT – If this option is selected, any text copied from a prior transcription by the MT in InScribe will be marked as Qualified Text.

Enable Retrieve and Correct – If this option is selected, typists will be able to pull delivered files back to outstanding job status for correction within InScribe.

Can Keep Work Local – If this option is checked then typists will be able to keep checked-out transcriptions on their computers when closing InScribe. If this box is not checked, then jobs will always be checked in when closing InScribe.

QA Program

Select which QA Rating program to use for this client. QA Rating programs are created in Maintenance> Advanced Maintenance> QA Ratings> Programs.

- QA Program	
Client Default Program	Emdat Demo Default Program ▾
Selected Document Types Programs	<input type="checkbox"/>

Client Default Program – Use the drop-down menu to select the QA program that will be used for the client for any document types not specified below.

Selected Document Types Programs – If this option is checked then you will be able to select specific QA Programs for each document type. In the drop-down menus that appear, select a document type in the left column and the appropriate program in the right column. Press the PLUS button to add this combination. Combinations already added appear above the drop-down menus and can be edited or deleted with the page and red X icons respectively.

Rate Information

Define the rate information for this relationship. The rate information can be based on many different factors.

- Rate Information	
Client Billing Method	Per Minute ▾
Demographics	
Include Demographic Characters	<input checked="" type="checkbox"/>
Body	
Count Lines with Divisor	<input checked="" type="checkbox"/>
Line Divisor	65 *
Count Visible Black Characters Only	<input checked="" type="checkbox"/>
Include Formatting Characters	<input type="checkbox"/>

Include Demographic Characters – If checked, demographic characters will be included in character counts. This includes: Associate, Patient and Appointment information, Document Type, Order Number and User Fields.

Count Lines with Divisor – If this is checked, then lines will be calculated by Character Counting Type. If it is unchecked, Gross Line Count is used.

Line Divisor – This divisor is used to determine how many characters compose a full line. The default is 65 characters per line.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Count Visible Black Characters Only – If this option is on, only characters that can be seen when printed will be added to the line count. If this option is off, then all characters including spaces, tabs, and formatting keystrokes will be counted.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Include Formatting Characters – Include Formatting Characters. This includes key presses to turn the following formats on and off: Bold, Underline, Italic, Subscript, Superscript, Strike-through, Indent, List Items (Bullets or Numbers).

– Per Line Settings	
Enable Qualified Text	<input checked="" type="checkbox"/>
Qualified Text Rate	\$.15
Base Rate	\$.15
Stat Rate	\$.15
Attestation Rate	\$.15
ShadowScribe Rate	\$.055
ShadowScribe Edit Rate	\$.055
– Per Minute Settings	
Base Rate	\$ 2
Stat Rate	\$ 3.5
ShadowScribe Rate	\$ 3.5
ShadowScribe Edit Rate	\$ 3.25

Enable Qualified Text – If this is turned on, then qualified text will be counted separately from standard text in the client billing reports.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Qualified Text Rate – This is the rate that will be charged to the client for lines of Qualified Text if “Enable Billing for Qualified Text” is turned on.

Base Rate – This defines the base rate per line to be charged to the client. There can be modifiers that adjust this up or down based on specific criteria within the client setup.

Stat Rate – This defines the per line rate for stat jobs. There can be modifiers that adjust this up or down based on specific criteria within the client setup.

Attestation Rate – This defines the per line rate for attestation templates that are added by a signing physician.

ShadowScribe Rate – This defines the per minute rate for ShadowScribe jobs that are delivered directly to the client without any Editing. That is, the estimated Q-Score of the ShadowScribe Draft exceeds the Client's Dictator Acceptance setting.

ShadowScribe Edit Rate – This defines the ASR voice recognition rate per line charged to the client for transcription company editing. This is the rate the client will pay if the transcription company edits the report.

Per Page Fax Settings	
Fax Rate	\$ 0.1
Cover Page Rate	\$ 0.08
InTouch Settings	
Direct-Dial Rate (per line)	\$ 0
Toll-Free Rate (per line)	\$ 0.005
Direct-Dial Rate (per minute)	\$ 0
Toll-Free Rate (per minute)	\$ 0.05

Fax Rate – This is the rate that will be charged to the client for each page (after the eScription One supplied cover page).

Cover Page Rate – This is the rate that will be charged to the client for the cover page.

Note: The following settings are customizable per line, per minute, or both:

Direct-Dial Rate – This rate will be added to the Client Base Rate when the clinician dictates through the InTouch system by dialing a local number for a standard priority document.

Toll-Free, Rate – This rate will be added to the Client Base Rate when the clinician dictates through the InTouch system by dialing the toll-free number for a standard priority document.


ShadowScribe Settings

ShadowScribe Settings	
ShadowScribe Status	QA Level 4 ?

ShadowScribe Status – This is the transcriptionist level at which the ASR voice recognized transcriptions (and their associated voice files) will be sent for editing.

Note: Before a client can be enabled for ASR voice recognition, a style guide configuration must be selected and the client properly setup.

Inactivate Relationship with Client <Selected Client>

 [Inactivate Relationship With Client ESODemo](#)

This option will inactivate your transcription company's relationship with the selected client. After clicking this link, you will be asked to confirm this selection. It is recommended that you ensure you have no outstanding jobs with your company or an outsource company before performing this.


Note: If you inactivate the relationship with a client, you cannot reactivate it through InCommand. Please submit a help desk request if you need to re-activate an inactive relationship.

Outsource <Selected Client> to Another Company

 [Outsource ESODemo to Another Company](#)


This option allows you to select another transcription company with whom you have an established relationship to outsource work to. To outsource to the company, select the available company on the right and click the "Outsource" button. After pressing this button, you will be moved to the Outsourced tab under Maintenance. Please see that section for more information.

Enter Client Maintenance for <Selected Client>

 [Enter Client Maintenance for ESODemo](#)


This option moves you to the Client Maintenance tab for the client you have selected. Please see that section for more information.

Enter InQuery for <Selected Client>

 [Enter InQuery for ESODemo](#)

This option moves you to the InQuery tab for the client you have selected. Please see the InQuery manual for more information.

Upload Client Image for <Selected Client>

 [Upload Client Image for ESODemo](#)

This option opens a new window where you can select an image located on your computer for use for the client's template graphic and InQuery logo.

Upload Client Image ✕

Enter the filepath of the image you wish to upload as the Client Logo. 500Kb maximum allowed.

InQuery Logo
 Template Graphic

Choose Files No file chosen

Client Logo should be 200 pixels wide x 40 pixels high and the image should be 72 dpi (.GIF file). If you upload a smaller logo, that will be used. If you upload a larger image (including a higher dpi), the system will scale it down to 200 x 40 pixels, which may affect the quality.

InQuery Logo – This image will appear at the top of the InQuery page when a user logs in.

Template Graphic – This image is not currently used.

Update InTouch rates for <Selected Client>



This option allows you change the additional rates you charge for dictations made through the telephone dictation system. Please see *Edit Relationship with <Selected Client> > Rate Information* for more information.

Map Transcription Copies for <Selected Client>



This option opens a new tab called Map Transcription Copies. Within this screen, you can set up links between clients so that typed transcriptions can be copied from one to another. For transcription text to be copied, the system must know what document type, location, and user the file will be assigned within the new client. This is accomplished by specifying mappings where transcriptions with certain document types, location, and users in the source client result in copied transcriptions in the destination client with the document type, location, and user, which is most appropriate. Select the client you would like for copies to be made from and then select the appropriate button. Transcriptions that are copied remain in the workflow in their current position in the source client and are put in the Completed/Search All position in the destination client.


Note: To push transcriptions using the mapping you have created, please contact the eScription One helpdesk.


Management Maintenance InVision ESODemo Client Maintenance InQuery

Defaults Clients EDEMO's Outsourced Work Transcriptionists MT Feedback Advanced Maintenance Map Transcription Copies


Mappings for ESODemo


To NOTW


 Add New Mapping


 Edit To NOTW Mapping


Edit Transcription Mapping To NOTW

 Options

 AutoMap

 Locations

 Document Types

 Users

Add New Mapping – Clicking this button presents you with a list of clients you can create a mapping for. Select the client the transcriptions will be copied to and click Create Mapping. After clicking this, you will be moved to the Edit Transcription Mapping section.

Edit Mapping – Click this option to open the **Edit Transcription Mapping** section on the right side (shown above).

Options

Edit Transcription Mapping To ESODemo	
Options	
Active	<input checked="" type="checkbox"/>
Email When Done	rick.:
Transcription Copy Charges	
Client Line Rate	0.2500
Client Per-Doc Rate	0.0000

Active – Checking this box will keep the mapping active so that it may be used.

Email When Done – Enter an email address to which a message will be sent when the transcription copy is complete. Multiple email addresses can be entered. They must be separated by a semi-colon.

Transcription Copy Charges:

- **Client Line Rate** – This is the amount per line that the client will be charged for these copies.
- **Client Per-Doc Rate** – This is the amount per document that the client will be charged for these copies.

Note: eScription One charges a half-cent per document for performing transcription copies for over 100 copies and a full cent for copies under 100 copies.

AutoMap

AutoMap attempts to find pairs of settings in the source client that have the same name in the destination client for locations, document types, and/or users. Once the settings and options have been selected, click the AutoMap button to complete the process.

AutoMap ?

Settings to Map

Locations

Document Types

Users

Options

Active Source Only

Active Destination Only

automap

Settings to Map – Select the settings (Locations, Document Types, Users) to AutoMap. Settings from the source client will be mapped to the setting with the same name on the destination client.












Options:

Active Source Only - Select whether to only map from Settings where the setting is Active on the source client.

Active Destination Only - Select whether to only map to Settings where the setting is Active on the destination client.

Locations












Use the drop-down menus to select the appropriate setting for the Source and Destination, and then select the green plus button to add the mapping. Mappings that have already been set can be edited or deleted by clicking the page icon or red X respectively.

Locations	
Source	Destination
<input type="checkbox"/> Show Inactive Source Locations	<input type="checkbox"/> Show Inactive Destination Locations
East	Default Location  
Hospital	Default Location  
Main	<script>alert(1)</sc  
West	"/><script>alert(3)<  
Default Location 1 	Default Location  

Show Inactive Source/Destination Locations – These options add any inactive locations to the drop-down menus of either the source or destination client.

Document Types


Use the drop-down menus to select the appropriate setting for the Source and Destination, and then press the green plus button to add the mapping. Mappings that have already been set can be edited or deleted by pressing the page icon or red X respectively.

Document Types	
Source	Destination
<input type="checkbox"/> Show Inactive Source Document Types	<input type="checkbox"/> Show Inactive Destination Document Types
Chart Note	Court Listing  
Clinical Note Order	Chart  
Comp and Pension	Test  
Consultation	Chart  
ASR Progress Note 	Appointment  

Show Inactive Document Types – This option adds any inactive document types to the drop-down menus of either the source or destination client, whichever box is checked.

Users

Use the drop-down menus to select the appropriate setting for the Source and Destination, and then press the green plus button to add the mapping. Mappings that have already been set can be edited or deleted by pressing the page icon or red X respectively.

Users	
Source	Destination
<input type="checkbox"/> Show Inactive Source Users	<input type="checkbox"/> Show Inactive Destination Users
New, User ▼	Testings, Additional ▼ 

Show Inactive Users – This option adds any inactive users to the drop-down menus of either the source or destination client, whichever box is checked.

Maintenance > Outsourced Work

Client List

This box includes all clients for which you have an outsource relationship with another transcription company. Select the client in this box and then click a link below to enter into the specific section of maintenance needed. You can use the check box below the list to sort the list by Transcription Company rather than client.

The screenshot shows a web interface with a navigation bar at the top containing 'Management', 'Maintenance', 'InVision', and 'Client Maintenance'. Under 'Client Maintenance', there are sub-tabs: 'Defaults', 'Clients', 'EDEMO's Outsourced Work', and 'Transcripti'. The main content area is titled 'Transcription Companies' and includes a sub-header 'Clients Outsourced To Other Transcription Companies.' Below this is a scrollable list of entries: 'ACLIENT outsourced to ATS' (highlighted), 'ACLIENT outsourced to Emdat Sample TEST', 'ACLIENT outsourced to TRANSCRIPTION COMPANY TEST', 'ACLIENT outsourced to Proulx Transcription TEST', 'AEMQA outsourced to DHS Product Management TEST', 'AEMQA outsourced to Helpdesk TEST', and 'AEMQA outsourced to Sample TEST'. Below the list is a checkbox labeled 'by Transcription Company'. At the bottom, there are three action links: 'Outsource Work to Transcription Company', 'Edit Relationship ATS and ACLIENT', and 'Remove Relationship ATS and ACLIENT'.

Outsource Work to Transcription Company

A button with a person icon and the text 'Outsource Work to Transcription Company'.

Click this link to open two lists on the right side of the screen. The first list shows which transcription companies have made their services available to you. Select the transcription company you wish to outsource. Then in the box below it, select the client for which the selected transcription company will transcribe. Click Save, then 'Edit Relationship' to configure.

The screenshot shows a web interface titled 'Available Companies' with a sub-header: 'The following transcription companies have made their services available to you. Highlight the transcription company and client you wish to outsource and click on "Save" below. Be sure to Edit Relationship after "Save" is clicked.' Below this are two scrollable lists. The first list contains: 'DHS Product Management TEST' (highlighted), 'Demo TEST', 'Helpdesk TEST', 'Sample TEST', 'Community Hospital', 'Medical INK Corporation', 'Lee Transcribing', 'Escription TEST', and 'Medcom, Inc'. Below the first list is a second instruction: 'Highlight the client for which the above highlighted transcription company will transcribe.' The second list contains: '01Test' (highlighted), '02Test', '03TEST', 'ABAC', 'abcd', 'ABCMM', 'ABMC', 'ACLIENT', 'ADSIT', and 'AEMQA'.

Edit Relationship <Outsource Company> and <Client>

 [Edit Relationship ATS and ACLIENT](#)

Click this link to change options that determine which jobs the outsource company can type, rules that affect how the jobs are completed, and how the price you will pay the outsource company for reports.

Available Pools

Use the boxes to select which user and document pools the outsource company will receive in their Outstanding Jobs tab. Managers can also filter pools by location. For example, a client’s work from ‘location A’ can be sent to one outsource company, while work from ‘location B’ can be sent to another. Select ‘All’, a single, or multiple Locations to include in the Outsource Relationship. Selected locations in this relationship will have the same Workflow Options and Rates, and Client Rate Overrides.

Note: At least one box must be checked in both the user and document pool columns for the jobs to appear to the outsource company.

Available Pools ?

Default Category

User Pools <input type="checkbox"/>	Document Pools <input type="checkbox"/>	Locations <input type="checkbox"/>			
<input checked="" type="checkbox"/> Pool A <input type="checkbox"/> Pool B <input type="checkbox"/> Pool C	<input type="checkbox"/> ACL WT 20 <input checked="" type="checkbox"/> ACL WT 21 <input type="checkbox"/> ACL WT 22 <input type="checkbox"/> Default Document Pool	<table style="width: 100%;"> <tr> <td style="width: 50%;"> Selected Locations ABC </td> <td style="width: 10%; text-align: center;"> << add all < add remove > remove all >> </td> <td style="width: 40%;"> Available Locations Klinestown Miston not final Summerberg </td> </tr> </table>	Selected Locations ABC	<< add all < add remove > remove all >>	Available Locations Klinestown Miston not final Summerberg
Selected Locations ABC	<< add all < add remove > remove all >>	Available Locations Klinestown Miston not final Summerberg			

Workflow Options

Workflow Options ?

QA Before Release	<input type="checkbox"/>
QA is Optional	<input type="checkbox"/>
Can Add Associates	<input checked="" type="checkbox"/>
Can Keep Work Local	<input checked="" type="checkbox"/>
Enable Retrieve and Correct	<input type="checkbox"/>

QA Before Release – If this option is checked, then documents typed by the outsource company will not be delivered directly to the client. Instead, your company will receive the files in status Outsource QA to verify in InScribe before delivery.

Can Add Associates – Check this option to allow transcriptionists at the outsourced company to add associates to the client's database.

Can Keep Work Local – Check this option to allow the outsourced typists to keep checked-out transcriptions on their computers when closing InScribe. If this box is not checked, then jobs will always be checked in when closing InScribe.

QA is Optional – If this option is checked, then documents from the outsource company will only go through QA if that company requests it.

Enable Retrieve and Correct– If this option is selected, the outsource typists will be able to pull delivered files back to outstanding job status for correction within InScribe.

Rate Information

Use these options to define rate information for the outsource relationship. This rate will be used for the Outsourced To report to show how much per-line costs are incurred for this relationship.

Demographics	
Include Demographic Characters	<input checked="" type="checkbox"/>

Include Demographics Characters – Check this box to include demographic character counts. This includes Associate, Patient and Appointment information, Document Type, Order Number and User Fields.

Body	
Count Lines with Divisor	<input type="checkbox"/>
Line Divisor	<input type="text" value="65"/>
Count Visible Black Characters Only	<input type="checkbox"/>
Include Formatting Characters	<input checked="" type="checkbox"/>

Count Lines with Divisor – If checked, then lines will be calculated by Character Counting Type. If it is unchecked, Gross Line Count is used.

Line Divisor – This divisor is used to determine how many characters compose a full line. The default is 65 characters per line.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Count Visible Black Characters Only – If this option is on, only characters that can be seen when printed will be added to the line count. If this option is off, then all characters including spaces, tabs, and formatting keystrokes will be counted.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Include Formatting Characters – This includes key presses to turn the following formats on and off: Bold, Underline, Italic, Subscript, Superscript, Strike-through, Indent, List Items (Bullets or Numbers).

Per Line Settings	
Enable Payment for Qualified Text	<input type="checkbox"/>
Qualified Text Rate	\$ 0
Base Rate	\$ 0.12
Stat Rate	\$ 0.12
ShadowScribe Rate (M*Modal)	\$ 0.12
ShadowScribe Rate (Nuance)	\$ 0.12
Outsource Additional Characters	<input type="checkbox"/>

Enable Payment for Qualified Text – If this is turned on, then qualified text will be counted separately from standard text in the Outsource To report.

Note: This option can only be selected if **Count Lines Units with Divisor** is turned on.

Qualified Text Rate – This is the rate that will be paid to the outsource company for lines of Qualified Text if “Enable Payment for Qualified Text” is turned on.

Base Rate – This is the per-line rate you will pay the outsourced transcription company for non–stat jobs.

Stat Rate – This is the per-line rate you will pay the outsourced transcription company for stat jobs.

ShadowScribe Rate (DeliverHealth*MModal and Nuance?)** – This is the per-line rate you will pay the outsourced transcription company for any ASR voice recognized jobs that are edited.

Outsource Additional Characters – If any document types have been configured to bill for additional characters, you can use this option to pass along those characters to the outsource company.

Per Minute Settings	
Base Rate	\$ 2.0
Stat Rate	\$ 2.0
ShadowScribe Rate (M*Modal)	\$ 2.0
ShadowScribe Rate (Nuance)	\$ 2.0

Base Rate – This is the per–line rate you will pay the outsourced transcription company for non–stat jobs.

Stat Rate – This is the per–line rate you will pay the outsourced transcription company for stat jobs.

ShadowScribe Rate (M*Modal*)** – This is the per-line rate you will pay the outsourced transcription company for any ASR voice recognized jobs that are edited.

ShadowScribe Rate (Nuance^{*})** – This is the per-line rate you will pay the outsourced transcription company for any ASR voice recognized jobs that are edited.

Modifiers			
User Price Modifiers	Base Rate Modifiers <input type="text"/> + Add Modifier	Qualified Text Rate Modifiers <input type="text"/> + Add Modifier	Per Minute Rate Modifiers <input type="text"/> + Add Modifier
Document Price Modifiers	Base Rate Modifiers <input type="text"/> + Add Modifier	Qualified Text Rate Modifiers <input type="text"/> + Add Modifier	Per Minute Rate Modifiers <input type="text"/> + Add Modifier
Document Pricing Overrides	<input type="text"/> + Add Modifier		

User Price Modifiers – This section allows you to add modifiers for specific users for the base rate and qualified text rate. These changes are in addition to the base rate and QT rate specified above. To add a modifier, press the **Add Modifier** button. On the next screen, select a user who is outsourced and enter the modifier. Use the **Edit Modifier** button to edit an existing modifier and the **Remove Modifier** button to erase an existing modifier.

Document Price Modifiers – This section allows you to add modifiers for specific document types for the base rate and qualified text rate. These changes are in addition to the base rate and QT rate specified above. To add a modifier, press the **Add Modifier** button. On the next screen, select a document type that is outsourced and enter the modifier. Use the **Edit Modifier** button to edit an existing modifier and the **Remove Modifier** button to erase an existing modifier.

Document Pricing Overrides – This section allows you to add flat pricing for specific document types. These changes replace the base rate and QT rate specified above. To add a modifier, press the **Add Modifier** button. On the next screen, select a document type that is outsourced and enter the price. Use the **Edit Modifier** button to edit an existing modifier and the **Remove Modifier** button to erase an existing modifier.

Client Rate Overrides

Rates entered in this section will override the rate charged to the client for transcription performed by this outsource company.

- Client Rate Overrides

Per Line Settings

Base Rate	\$ <input style="width: 80%;" type="text" value="0.11"/>
Stat Rate	\$ <input style="width: 80%;" type="text" value="0.13"/>
ShadowScribe Edit Rate (M*Modal)	\$ <input style="width: 80%;" type="text" value="0.09"/>
ShadowScribe Edit Rate (Nuance)	\$ <input style="width: 80%;" type="text" value="0.09"/>
Qualified Text Rate	\$ <input style="width: 80%;" type="text" value="0.065"/>

Base Rate – Setting this rate will override the Base Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

Stat Rate – Setting this rate will override the Stat Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

ShadowScribe Edit Rate (M*Modal^{*})** – Setting this rate will override the ShadowScribe Edit Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

ShadowScribe Edit Rate (Nuance^{*})** – Setting this rate will override the ShadowScribe Edit Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

Qualified Text Rate – Setting this rate will override the Qualified Text Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

- Per Minute Settings

Base Rate	\$ <input style="width: 80%;" type="text" value="2.0"/>
Stat Rate	\$ <input style="width: 80%;" type="text" value="3.5"/>
ShadowScribe Edit Rate (M*Modal)	\$ <input style="width: 80%;" type="text" value="3.5"/>
ShadowScribe Edit Rate (Nuance)	\$ <input style="width: 80%;" type="text" value="3.25"/>

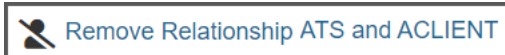
Base Rate – Setting this rate will override the Base Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

Stat Rate – Setting this rate will override the Stat Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

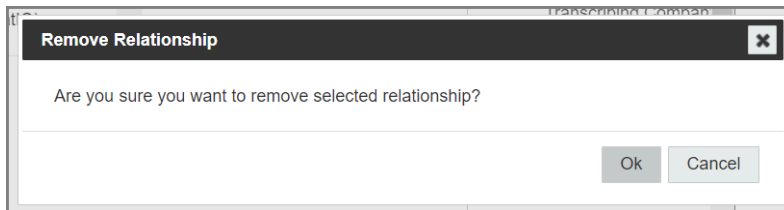
ShadowScribe Edit Rate (M*Modal^{*})** – Setting this rate will override the ShadowScribe Edit Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

ShadowScribe Edit Rate (Nuance^{*})** – Setting this rate will override the ShadowScribe Edit Rate billed to the client, as set on the Client Relationship, when the transcription is performed by this Outsource Company.

Remove Relationship <Outsource Company> and <Client>



Clicking this link will remove an outsource relationship that has been established between the selected client and outsource company. After clicking this link, you will be prompted to verify that you are sure you would like to remove the relationship.

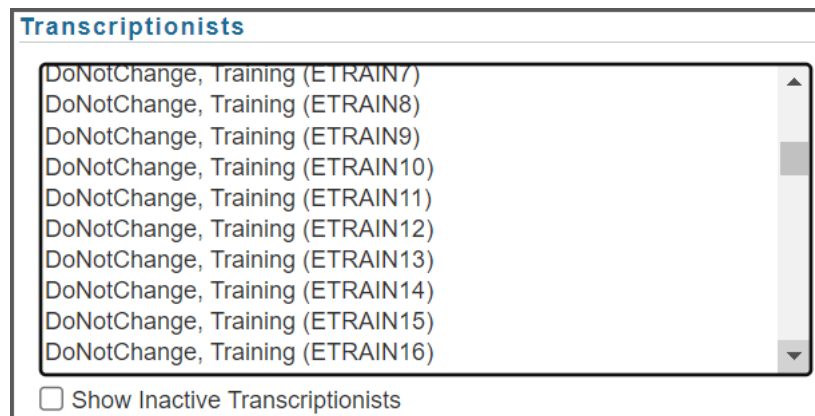


Maintenance > Transcriptionists

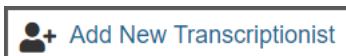
Use the Transcriptionists tab to add, edit, and copy transcriptionists, as well as modify which clients and pools they type for and which reports they have access to.

Transcriptionists List

This box includes all transcriptionists that belong to your transcription company. Select a transcriptionist in this box and then click one of the links below perform an action. You can use the 'Show Inactive Transcriptionists' check box below the list to include transcriptionists that are inactive. Inactive transcriptionists appear in gray.



Add New Transcriptionist Wizard



This link opens the 'Add New Transcriptionist Wizard' in a new window. Transcriptionists must have a unique Username across the eScription One platform. All sections entered in this form can be edited after the typist has been created. Please see the sections below for more details.

Edit Setup for <Selected Transcriptionist>



Click this link to edit the setup for the selected transcriptionist.

Edit Setup for Transcriptionist

- + Transcriptionist Information
- + Password and Security Options
- + InScribe Setup Options
- + Default Rate Options
- + InCommand Security Roles
- + InCommand Restrictions

Transcriptionist Information

This section contains general information about the transcriptionist. Fields of note are:

- Transcriptionist Information

Typist ID	11500 ?	
Name (First/Middle/Last)	ian	a
	Angus	*
Initials	ianinit	
Username	ian *	
Password		generate temporary password
Must Change Password At Next Login	<input type="checkbox"/>	send reset password instructions
Address 1	100 N Main St	
Address 2		
Address 3		
City	Milwaukee	
State	WI	
Zip Code	12345	
Country	US,12455,99	
Phone 1	123456	
Phone 2		
Fax		
E-Mail	@deliverhealth.com	verified

Unlock Transcriptionist – If a transcriptionist’s account is locked, text will appear at the top of the setup screen notifying of the status and this button will appear in the Transcriptionist Information section:

This transcriptionist is locked and cannot login. [Click here to unlock.](#)

Typist ID – This is an automatically generated ID that cannot be edited.

Initials – This is used by the print template. If the typist’s initials will appear on the report, the information is pulled from this field. This field is also used in the Feedback score card if the transcription company has chosen to include the grader’s initials.

Password – This field will appear blank although there is information stored. To change/reset the typist’s password, type a new value here and press the Save button. If this is left blank, the password will not change.

Generate Temporary Password – This button will generate a new temporary password that contains at least 1 symbol, 1 number and 1 uppercase letter and is 20 characters long. When a password is set with this button, you can see the generated password.

Must Change Password At Next Login – This is used to force the transcriptionist to change their password the next time they login to any application.

Send Reset Password Instructions – This button will send an email to the transcriptionist email address with instructions to reset their password.

E-mail – An email is required to utilize the reset password feature. A Verify button will appear next to the E-mail field if the email address has not been verified. Pressing the verify button will send a confirmation email to the transcriptionist. After the transcriptionist follows the “Verify Email Address” link in the email, the verify button will be replaced with a green check and “verified” text. If the transcriptionist’s email is edited or changed, the verification process must be repeated.

Password and Security Options

This section contains login and security options for the transcriptionist.

- Password and Security Options		?
Use Multi-Factor Authentication	<input checked="" type="checkbox"/>	
SSO Enrollment	Unenrolled	invite transcriptionist to SSO
InCommand Time-Out	<input type="text" value="0"/>	
Audio Playback Method	Use Company Default	

Use Multi-Factor Authentication – Check this box to require this transcriptionist to log in using multi-factor authentication.

SSO Enrollment – Displays the transcriptionist’s Single Sign-On (SSO) enrollment status. The status of the invitation or enrollment will determine which action button appears (“invite transcriptionist to SSO”, “revoke SSO invite”, “unenroll transcriptionist from SSO”). The MTSO must establish an SSO tenant with the eSOne support team prior to enrolling transcriptionists in SSO.

InCommand Time-Out – Enter the minutes of inactivity before InCommand automatically logs the typist out.

Audio Playback Method - Use the drop-down menu to select the default dictation playback method for the typist. This setting will override the transcription company level setting.

InScribe Setup Options

This section contains options that the user will have available in the InScribe application.

InScribe Setup Options	
Active	<input checked="" type="checkbox"/>
Docs In Queue	3 <input type="text"/>
Max Docs In Queue	8 <input type="text"/>
Typist Status	QA Level 1 <input type="text"/>
Can Add Associate	<input checked="" type="checkbox"/>
Can Edit Patient	<input checked="" type="checkbox"/>
Can Enter New Tran	<input checked="" type="checkbox"/>
Can Invalidate by Default	<input checked="" type="checkbox"/>
Can Check for Dictations	<input checked="" type="checkbox"/>
Can View Pool	<input checked="" type="checkbox"/>
Can View Prior Tran	<input checked="" type="checkbox"/>
Can Print Tran	<input type="checkbox"/>
Show Final Counts	<input checked="" type="checkbox"/>
Enable Workstation Policy	<input type="checkbox"/>
Disable ShadowScribe Draft Editing	<input type="checkbox"/>

Active – If this is unchecked then the typist will be inactive. This is similar to deleting the typist from your company.

Docs in Queue – This is the number of jobs that will download in a batch when the typist performs an action in InScribe that downloads jobs.

Max Docs in Queue – This is the maximum number of jobs that will download into the typist's queue in InScribe.

Typist Status – This is the status level of jobs that the typist can check out. The available statuses are Transcription, QA Level 1–5, Outsource QA.

Note: A typist can only be set to one status within the setup. If a typist needs to work at multiple levels (such as both Transcription and QA1), then the typist will need to use multiple usernames.

Can Add Associate – If this is checked the typist will be given the option to add associates in InScribe to the client's database.

Can Edit Patient – If this is checked the typist will be allowed to edit patient demographic information and update the client's database.

Can Enter New Tran – When this is checked, the typist can create new transcriptions without needing to download an audio file within InScribe.

Can Invalidate by Default – This setting determines whether 'Can Invalidate' will be checked or unchecked by default when creating a pool.

Can Check for Dictations – If this is checked the typist can enable an option in InScribe to automatically check for and download dictations when they become available if jobs are not already downloaded.

Can View Pool – If this is checked the typist can see a list of all jobs awaiting transcription or QA in their work pool from within InScribe.

Can View Prior Tran – Enabling this setting allows transcriptionists to search for prior transcriptions within InScribe based on the patient, document type, and/or dictator.

Can Print Tran – If this is checked the typist can print a transcription from the Preview window.

Show Final Counts – If this is checked transcriptionists will see a final character count in InScribe after completing each transcription.

Enable Workstation Policy – If the transcription company is set up to use additional workstation policy security provisioning, this can be enforced for the transcriptionist. If this option is not checked, then the workstation policy setup by the transcription company will not apply to the transcriptionist.

Disable ShadowScribe Draft Editing – If checked, this option prevents a transcriptionist from receiving ShadowScribe editing jobs. Only non-draft jobs will be downloaded and available. This option can be used for transcriptionists not qualified to edit draft documents.

Default Rate Options

These settings determine what the corresponding settings will be by default when creating a pool.

— Default Rate Options

Pay Based On	Delivered Lines ▼
--------------	--

Demographics

Include Demographic Characters	<input checked="" type="checkbox"/>
--------------------------------	-------------------------------------

Body

Count Lines with Divisor	<input checked="" type="checkbox"/>
Count Visible Black Characters Only	<input type="checkbox"/>
Line Divisor	50
Include Formatting Characters	<input checked="" type="checkbox"/>

Rates

Typing Base Rate	\$ 0.12
Typing Stat Rate	\$ 0.14
Editing Base Rate	\$ 0.06
Editing Stat Rate	\$ 0.07
Enable Payment for Qualified Text	<input checked="" type="checkbox"/>
Qualified Text Rate	\$ 0.1111
Apply Ratings to Pay	No ▼
QA Rating Pay Modifier	Modifier 1 ▼

Pay Based On – This setting determines if the typists will be paid based on the number of delivered lines (taking into account lines added or removed by subsequent editing, such as QA levels) or transcribed lines (paying the typist for the lines they typed, not additional lines added or removed by subsequent editing by QA level typists).

Include Demographic Characters – If this setting is checked, the demographic character in patient and appointment demographic fields will be included in the character counts for the typist.

Count Lines with Divisor – If this is checked, lines will be calculated by Divisor and Character Counting Type. If it is unchecked, Gross Line Count is used.

Count Visible Black Characters Only – If this option is on, only characters that can be seen when printed will be added to the line count. If this option is off, then all characters including spaces, tabs, and formatting keystrokes will be counted.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Line Divisor – This divisor is used to determine how many characters compose a full line. The default is 65 characters per line.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Include Formatting Characters - If this option is checked, it includes key presses to turn the following formats on and off: Bold, Underline, Italic, Subscript, Superscript, Strike-through, Indent, List Items (Bullets or Numbers)

Typing Base Rate – This defines the per-line rate paid for work done on a transcription that does not have an accepted ASR draft.

Typing Stat Rate – This defines the per-line rate paid for work done on a Stat transcription that does not have an accepted ASR draft.

Editing Base Rate - This defines the per-line rate paid for work done on a transcription that has an accepted ASR draft.

Editing State Rate - This defines per-line rate paid for work done on a Stat transcription that has an accepted ASR draft.

Enable Payment for Qualified Text – This enables the typist to have qualified text lines separated out in payment reports. The qualified text can then be paid at a different rate if desired.

Qualified Text Rate – This defines the qualified text rate per line to be paid to the typist.

Apply Ratings to Pay – This defines whether Rating Scores are used to affect the typist's pay rate as defined in Pay Rate Modifiers. The options are:

- **No** – Ratings and Feedback will not affect typist pay.
- **Yes** – Ratings and Feedback will affect pay based on the Pay Rate Modifier program selected.
- **Let QA Decide** – QA will be allowed to select whether individual jobs will be included in calculations for the Pay Rate Modifier program selected.

QA Rating Pay Modifier – Select the Pay Rate Modifier Program that will be used when Apply Ratings to Pay is set to Yes or Let QA Decide.

InCommand Security Roles

These options allow typists access to log into InCommand for varying degrees of management and maintenance access. Options that are indented require their parent option above to be selected. These indented options provide further specified access to the required option.

Note: If you are editing your own setup, you will not have access to change your InCommand Security Roles.

InCommand Security Roles

- Maintenance Tab
- MTSO Defaults and Contacts Sub-Tab
- Clients Sub-Tab
 - Client Administrator
 - Modify Clients
 - Client Rates
- Outsource Work Sub-Tab
 - Outsource Rates
- Transcriptionist Sub-Tab
 - Transcriptionist Administrator
 - Modify Transcriptionist Setup
 - Transcriptionist Rates
- Community Sub-Tab
- Comment Tags Sub-Tab

Maintenance Tab – Grant user access to the Maintenance Tab in InCommand.

MTSO Defaults and Contacts Sub-Tab – Grants users access to the Clients section of the Maintenance Tab.
Requirement – Maintenance Tab

Clients Sub-Tab – Grants user access to the Clients section on the Maintenance Tab. If the user also has the Outsource Work Sub-Tab option selected, then they will be able to setup new relationships.
Requirement – Maintenance Tab

Client Administrator – Grants user access to all aspects of the Clients section including rate information and the New Client Wizard.
Requirement – Clients Sub-Tab

Modify Clients – Grants user access to modify QA information in the relationship and edit client setup. Does not allow user to create new clients or to change client rates in relationships.

Requirement – Clients Sub-Tab

Client Rates – Grants users access to modify rates for a client in relationships.

Requirement – Modify Clients

Outsource Work Sub-Tab – Grants user access to the Outsource Work section on the Maintenance tab. User will have the ability to maintain outsourcing for existing relationships. When this is enabled along with Contacts Sub-Tab, the user can also create new outsourcing relationships.

Requirement – Maintenance Tab

Outsource Rates – Grants user access to modify rates in an outsource relationship.

Requirement – Outsource Work Sub-Tab

Transcriptionist Sub-Tab – Grants user access to the Transcriptionist sub-tab.

Requirement – Maintenance Tab

Transcriptionist Administrator – Grants user access to all parts of the transcriptionist setup including setting default rates, InCommand security roles, and restrictions.

Requirement – Transcriptionist Sub-Tab

Modify Transcriptionist Setup – Grants user access to Transcriptionist information and InScribe setup options. Also lets the user modify the clients and pools for a transcriptionist. Does not allow the user to see or change rates for the transcriptionist.

Requirement – Transcriptionist Sub-Tab

Transcriptionist Rates – Grants user access to modify rates for a transcriptionist; both in the transcriptionist setup (default rates) and the modify pool area.

Requirement – Modify Transcriptionist Setup

Community Sub-Tab – Grants access to the Community sub-tab.

Requirement – Maintenance Tab

Comment Tags Sub-Tab – Grants access to the Comments Tags Sub-Tab.

Requirement – Maintenance Tab

<input type="checkbox"/>	Dictation Emulations Sub-Tab
<input type="checkbox"/>	MT Feedback
<input checked="" type="checkbox"/>	Client Maintenance Tab
<input checked="" type="checkbox"/>	Can Manage Patients
<input type="checkbox"/>	Modify Patient Visit Filter Rule Setup
<input type="checkbox"/>	View Validation Rules Setup
<input type="checkbox"/>	Modify Validation Rules Setup
<input type="checkbox"/>	Can Manage Distribution Rules
<input checked="" type="checkbox"/>	Inquiry Tab
<input checked="" type="checkbox"/>	InVision Tab
<input checked="" type="checkbox"/>	Management Tab
<input checked="" type="checkbox"/>	Can Manage Delivered
<input checked="" type="checkbox"/>	Can Change Status of Delivered
<input checked="" type="checkbox"/>	Can Resubmit Delivered to QA
<input checked="" type="checkbox"/>	Can View Transcriptions
<input type="checkbox"/>	Can Manage ShadowLink
<input checked="" type="checkbox"/>	Can Manage Exports
<input type="checkbox"/>	InTrack Tab

Dictation Emulations Sub-tab – Grants users access to the Dictation Emulations sub-tab.

MT Feedback - Grants users access to view MT Feedback.

Client Maintenance Tab – Grants user access to the Client Maintenance and Inquiry tab.

Can Manage Patients – Grants user access to manage Patients on the Patients screen. *Requirement – Client Maintenance Tab*

Modify Patient Visit Filter Rule Setup – Grants user access to the Patient Visit Filter Rule setup options. *Requirement – Client Maintenance Tab*

View Validation Rules Setup – Grants user access to view Validation Rules and Snippets. *Requirement – Client Maintenance Tab*

Modify Validation Rules Setup – Grants user access to modify Validation Rules and Snippets. *Requirement – View Validation Rules Setup*

Can Manage Distribution Rules – Grants user access to manage Distribution Rules. *Requirement – Client Maintenance Tab*

Inquiry Tab – Grants user access to the InQuery tab.

InVision Tab – Grants user access to the InVision tab.

Note: Access to specific reports is granted through View Report Access for <Selected Transcriptionist> below.

Management Tab – Grants user access to the Management Tab, including the Outstanding Jobs sub-tab and the Summary sub-tab.

Can Manage Delivered – Grants user access to the delivered jobs sub-tab. *Requirement – Management Tab*

Can Change Status of Delivered – Grants user access to move delivered transcriptions between workflow folders. *Requirement – Can Manage Delivered*

Can Resubmit Delivered to QA – Grants user the ability to pull a job back from delivered to outstanding jobs status. *Requirement – Can Change Status of Delivered*

Can View Transcriptions – Grants the user the ability to view the full transcription from either the Outstanding Jobs (if it is typed, but still in undelivered status) or the Delivered Transcriptions sub-tabs. *Requirement – Can Manage Delivered*

Can Manage ShadowLink – Grants user access to the ShadowLink sub-tab. *Requirement – Can Manage Delivered*

Can Manage Exports – Grants user the ability to export a transcription from either the Outstanding Jobs or Delivered Transcriptions sub-tabs. *Requirement – Management Tab*

InTrack Tab – Grants user access to the InTrack tab.

InCommand Restrictions

This section allows you to restrict the security roles designated above to only apply to specific clients or pools.

Notes:

- If restrictions are used, you must "View Clients and Pools" then "Update Pay/ Manage Clients" to grant access to specific clients.
- You can either restrict dictations by clients or by pools but not both.

The screenshot shows a web-based settings panel titled "InCommand Restrictions". Inside the panel, there are two radio button options: "* Restrict Access by Clients" and "* Restrict Access by Pools". The "Restrict Access by Pools" option is currently selected. A red question mark icon is located in the top right corner of the settings area.

Restrict Access by Clients – Restricts user to view Outstanding Jobs and Delivered Jobs only for clients they have access to. The typist must have the appropriate settings in View Clients and Pools for <Selected Transcriptionist> > Update Pay / Manage Clients > Client Options > Manage Client. Also restricts user to the clients they can manage based on 'Manage Client' option in Transcriptionist Pool settings.

Restrict Access by Pools – Restricts user to only view Outstanding Jobs and Delivered Jobs only for User Pools they are assigned to. The typist must have the appropriate pools assigned in View Clients and Pools for <Selected Transcriptionist>. Also restricts the management or maintenance access of clients for which they have a pool assigned.

Copy Selected Transcriptionist



This link allows you to copy the settings of the selected transcriptionist to a new transcriptionist. The only required fields are Name, Username, and Password. After Save is pressed, the Edit Setup for <Selected Transcriptionist> screen will open, allowing you to make any necessary modifications. All settings from Edit Setup for <Selected Transcriptionist> (except for the Transcriptionist Information section) and all settings within Modify Clients and Pools for <Selected Transcriptionist> are copied from the source transcriptionist to the new copied transcriptionist.

Copy Transcriptionist to ?

Name (First/Middle/Last)	<input type="text"/>	*
Initials	<input type="text"/>	
Username	<input type="text"/>	*
Password	<input type="password"/>	* generate temporary password
E-Mail	<input type="text"/>	*

View <Selected Transcriptionist> Jobs



This link opens a new window that shows what jobs are available to the transcriptionist based on the current pool setup. It displays the TID, Client, Dictator, Document Type, Date Received, and Length of the audio file.

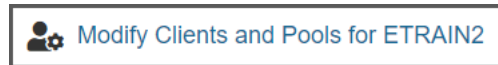
Transcriptionists Jobs - Google Chrome

escription-one.com/tspadmin/_TC_Tranists_Jobs.asp?Tranist_ID=11500&Tranist_Name=IAN

Transcriptionist IAN Jobs print close

TID	Client	Dictator	Document type	Date Received	Length
268724240	ESODemo	Demonstration User	Chart	9/9/22 4:48 PM	00:00:19
273225500	ESODemo	Demonstration User	Consult	10/24/22 1:30 PM	00:00:23
275254675	ESODemo	Safi A. _Intouch M.D.	NuProg	11/8/22 12:29 AM	00:00:00
9073226	AEMQA	inquiry1 inquiry1		10/24/05 5:46 PM	00:00:00
36034462	AEMQA	inquiry1 inquiry1		8/31/09 5:45 PM	00:00:08
39620540	AEMQA	inquiry1 inquiry1		1/18/10 11:19 AM	00:00:33
39620541	AEMQA	inquiry1 inquiry1		1/18/10 11:19 AM	00:00:33
41130677	AEMQA	inquiry1 inquiry1		3/11/10 12:55 PM	00:05:03
41130696	AEMQA	inquiry1 inquiry1		3/11/10 12:56 PM	00:02:41
41130697	AEMQA	inquiry1 inquiry1		3/11/10 12:56 PM	00:14:33
41130702	AEMQA	inquiry1 inquiry1		3/11/10 12:56 PM	00:03:12
41130722	AEMQA	inquiry1 inquiry1		3/11/10 12:56 PM	00:03:36

Modify Clients and Pools for <Selected Transcriptionist>



This link allows you to select what jobs a transcriptionist will type. You can select which clients are available and the pay rate for the typist. Within the clients you can choose which clinicians, document types, and locations. You will be also able to select the priority that jobs are available to the typist.

Client List

This box shows all of the clients for which the transcriptionist has been set up to type for at least one pool.

Modify Clients and Pools For Transcriptionist IAN

The transcriptionist currently types for the following clients:

- AEMQA
- ESODemo
- IMFTEAM
- test3
- testclient1

[Manage Client AEMQA Options \(Pay, Access, etc.\)](#)

The transcriptionist currently types for the following pools:

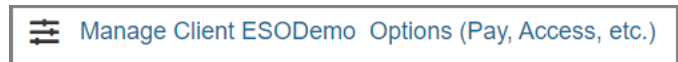
- AEMQA - Pool01 (Priority 1; User Pools 1; Doc Pools 1)
- ESODemo - (Priority 1; User Pools 3; Doc Pools 127)
- IMFTEAM - IMFTeamQA (Priority 1; User Pools 1; Doc Pools 1)
- test3 - abcd (Priority 1; User Pools 0; Doc Pools 0)
- xyztest - (Priority 5; User Pools 1; Doc Pools 33)

[Add New Pool](#)

[Edit Pool AEMQA - Pool01](#)

[Remove Pool AEMQA - Pool01](#)

Manage Client <Selected Client> Options (Pay, Access, etc.)



This link opens options for the transcriptionist's jobs for the client including payment options and management options.

Transcriptionist IAN Pay for Client

- [Payment Options](#)
- [Client Options](#)
- [Document Pricing Overrides](#)

Payment Options

These rates determine how the transcriptionist is paid for the client.

- **Payment Options**

Pay Based On	Delivered Lines ▼
--------------	--

Demographics

Include Demographic Characters	<input checked="" type="checkbox"/>
--------------------------------	-------------------------------------

Body

Count Lines with Divisor	<input checked="" type="checkbox"/>
Count Visible Black Characters Only	<input type="checkbox"/>
Line Divisor	50
Include Formatting Characters	<input checked="" type="checkbox"/>

Rates

Typing Base Rate	\$ 0.12
Typing Stat Rate	\$ 0.14
Editing Base Rate	\$ 0.06
Editing Stat Rate	\$ 0.07
Enable Payment for Qualified Text	<input type="checkbox"/>
Qualified Text Rate	\$ 0
Apply Ratings to Pay	No ▼
Update Transcriptions	New rate is applied going forward ▼

Pay Based On – This setting determines if the typists will be paid based on the number of delivered lines (taking into account lines added or removed by subsequent editing, such as QA levels) or transcribed lines (paying the typist for the lines they typed, not additional lines added or removed by subsequent editing by QA level typists).

Include Demographic Characters – If this setting is checked, the demographic character in patient and appointment demographic fields will be included in the character counts for the typist.

Count Lines with Divisor – If this is checked, lines will be calculated by Divisor and Character Counting Type. If it is unchecked, Gross Line Count is used.

Count Visible Black Characters Only – If this option is on, only characters that can be seen when printed will be added to the line count. If this option is off, then all characters including spaces, tabs, and formatting keystrokes will be counted.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Line Divisor – This divisor is used to determine how many characters compose a full line. The default is 65 characters per line.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Include Formatting Characters - If this option is checked, it includes key presses to turn the following formats on and off: Bold, Underline, Italic, Subscript, Superscript, Strike-through, Indent, List Items (Bullets or Numbers)

Typing Base Rate – This defines the per-line rate paid for work done on a transcription that does not have an accepted ASR draft.

Typing Stat Rate – This defines the per-line rate paid for work done on a Stat transcription that does not have an accepted ASR draft.

Editing Base Rate - This defines the per-line rate paid for work done on a transcription that has an accepted ASR draft.

Editing State Rate - This defines per-line rate paid for work done on a Stat transcription that has an accepted ASR draft.

Enable Payment for Qualified Text – This enables the typist to have qualified text lines separated out in payment reports. The qualified text can then be paid at a different rate if desired.

Note: This option can only be selected if Count Lines with Divisor is turned on.

Qualified Text Rate – This defines the qualified text rate per line to be paid to the typist.

Apply Ratings to Pay – This defines whether Rating Scores are used to affect the typist's pay rate as defined in Pay Rate Modifiers. The options are:

- **No** – Ratings and Feedback will not affect typist pay.
- **Yes** – Ratings and Feedback will affect pay based on the Pay Rate Modifier program selected.
- **Let QA Decide** – QA will be allowed to select whether individual jobs will be included in calculations for the Pay Rate Modifier program selected.

Update Transcriptions – This determines what date range is affected when you save changes to the payment options. The options are:

- **New rate is applied going forward** – New values will apply to all transcriptions delivered after the changes are saved.
- **Update all prior transcriptions** – New values will apply to all transcriptions delivered before the changes are saved.
- **Update from Date to Date** – New values will apply to all transcriptions delivered within the date range selected in the Update From ___ thru ___ fields that appear when this option is selected.

Client Options

- Client Options

Manage Client	<input type="checkbox"/>	?
Automatic dictation check in	None	
Can View Prior Tran	<input checked="" type="checkbox"/>	
Can Print Tran	<input type="checkbox"/>	

Manage Client – Use this checkbox to determine if this client will be available for management and maintenance if the option in Maintenance > Transcriptionists > Edit <Selected Transcriptionist> > InCommand Restrictions > Restrict Access by Clients is selected.

Automatic dictation check in – Use this drop-down menu to determine a time limit for jobs to be checked out to the typist. Once this limit is reached, the system will automatically check the job back in so it can be typed by another transcriptionist.

Can View Prior Tran - When set, the MT will be able to view transcriptions previously done for that client (by Patient, Author or Work Type).

Can Print Tran - When set, the MT will be able to print a transcription from the Preview window.

Document Pricing Overrides

This section allows you to add flat pricing for specific document types. These changes replace the base rate and QT rate specified above.

- Document Pricing Overrides

JoeQA: Divisor = 35
 TestA: Price = \$1
 BlankDoc: Price = \$1

?

+ Add Price or Divisor
✎ Edit Price or Divisor
- Remove Price or Divisor

To add a price or divisor, press the 'Add Price or Divisor' button.



On the next screen, select a document type and enter the price.

Add Document Price

- EllisQA - Ellis QA Doc
- KevinDev - Kevin Dev Test Doc
- ProgNote - Progress Note
- officev - officev
- HSOPSTES - HSOPS TEST
- WADEtest - WADEs
- OFFVisit - Office visit
- Echo - Echo
- MZNSLett - MZNS Letter
- Bullet - List Bullet Test

Document Price \$ 0

Line Divisor 50

To edit an existing price or divisor, press the 'Edit Price or Divisor' button.



Edit Document Price

Document Price \$ 0

Line Divisor 35

last modified by ian on 6/29/1

To remove an existing price or divisor, press the 'Remove Price or Divisor' button.



Remove Document Price [X]

Are you sure you want to remove this document price?

Ok Cancel

Pool List

This box shows all of the pools for which the transcriptionist has been setup to type. The format is “<Client> – <Name of Pool if any> (Priority <>; User Pools <>; Doc Pools <>)”.

Modify Clients and Pools For Transcriptionist IAN

The transcriptionist currently types for the following clients:


AEMQA ▲

ESODemo

IMFTEAM

test3

testclient1 ▼

 [Manage Client AEMQA Options \(Pay, Access, etc.\)](#)

The transcriptionist currently types for the following pools:


AEMQA - Pool01 (Priority 1; User Pools 1; Doc Pools 1) ▲


ESODemo - (Priority 1; User Pools 3; Doc Pools 127)


IMFTEAM - IMFTeamQA (Priority 1; User Pools 1; Doc Pools 1)

test3 - abcd (Priority 1; User Pools 0; Doc Pools 0)

xyztest - (Priority 5; User Pools 1; Doc Pools 33) ▼

 [Add New Pool](#)

 [Edit Pool AEMQA - Pool01](#)

 [Remove Pool AEMQA - Pool01](#)

Add New Pool

 [Add New Pool](#)

This link opens the new pool assignment wizard in a new window. Most settings can be edited after they are set within the Edit Pool <Client – Pool Name> link.

Note: You cannot edit the Client or Pool Category after the pool is create

Edit Pool <Client – Pool Name>

[Edit Pool ESODEMO -](#)

Use this link to change settings for the pool of work that has been set up for the typist.

Edit Pool for Transcriptionist IAN							
Pool Description	<input type="text"/>						
Pool Category	Default Category						
Client	ESODemo						
Priority	1 <input type="text"/>						
Can Invalidate	<input checked="" type="checkbox"/>						
Enable Retrieve and Correct	<input type="checkbox"/>						
QA Optional	<input checked="" type="checkbox"/>						
QA Percent	0% <input type="text"/>						
Can Choose QA Level	Cannot choose QA Level <input type="text"/>						
Search for appointment/orders when dictation loads	Always Show Search Results <input type="text"/>						
Show Single Patient	Always Show Search Results <input type="text"/>						
Show Single Appointment / Order	Always Show Search Results <input type="text"/>						
Automatically Load the First Appointment	Let MT Choose <input type="text"/>						
Automatically Select Single Patient from Clinician Listing	Let MT Choose <input type="text"/>						
<table border="0"> <tr> <td>User Pools <input checked="" type="checkbox"/></td> <td>Document Pools <input type="checkbox"/></td> <td>Locations <input checked="" type="checkbox"/></td> </tr> <tr> <td> <input checked="" type="checkbox"/> Another Dictating Pool <input checked="" type="checkbox"/> Default User Pool </td> <td> <input checked="" type="checkbox"/> !@#-Doc Pool <input checked="" type="checkbox"/> Default Document Pool <input type="checkbox"/> LETTER POOL <input checked="" type="checkbox"/> Second Doc Pool <input checked="" type="checkbox"/> z-pool </td> <td>All Locations</td> </tr> </table>		User Pools <input checked="" type="checkbox"/>	Document Pools <input type="checkbox"/>	Locations <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Another Dictating Pool <input checked="" type="checkbox"/> Default User Pool	<input checked="" type="checkbox"/> !@#-Doc Pool <input checked="" type="checkbox"/> Default Document Pool <input type="checkbox"/> LETTER POOL <input checked="" type="checkbox"/> Second Doc Pool <input checked="" type="checkbox"/> z-pool	All Locations
User Pools <input checked="" type="checkbox"/>	Document Pools <input type="checkbox"/>	Locations <input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/> Another Dictating Pool <input checked="" type="checkbox"/> Default User Pool	<input checked="" type="checkbox"/> !@#-Doc Pool <input checked="" type="checkbox"/> Default Document Pool <input type="checkbox"/> LETTER POOL <input checked="" type="checkbox"/> Second Doc Pool <input checked="" type="checkbox"/> z-pool	All Locations					

Pool Description – Type an identifying name for this pool.

Pool Category – This is the category of user pools that are available to this pool. This is selected during the Add New Pool Assignment Wizard.

Client – This is the client for which this pool is created. This is selected during the Add New Pool Assignment Wizard.

Priority – This will determine in what priority the files for this pool will be assigned among other work the typist does. Typists will download jobs based on these settings: Pool Priority then Transcription Priority then Hours till the job is due.

Can Invalidate – Allows the typist to invalidate transcriptions within InScribe.

Enable Retrieve and Correct – If this option is selected, typists will be able to pull delivered files back to outstanding job status for correction within InScribe.

QA Optional – If this is checked, the transcriptionist will be able to select whether the file will go to QA or not.

QA Percent – This will determine the percentage chance that a file that is not marked to go to QA will be selected by the system to go to QA anyway.

Note – QA Percent 100% is the equivalent of QA Optional being unchecked.

Can Choose QA Level – This determines the behavior when a transcriptionist marks a file for QA. The QA levels available are determined by the client relationship.

- **Cannot choose QA Level** – Files marked for QA will always go to the next highest level of QA available in the client relationship.
- **Can choose QA Level** – Typists will be prompted for the level of QA to send a file that has been marked for QA.
- **Can choose QA Level and Deliver to Client** – Typists will be prompted for the level of QA to send a file that has been marked for QA. In addition, an option for “Deliver to Client” will be available.

User Pools / Document Pools – Use the boxes to select which user and document pools the typist will be able to work on.

Note: At least one box must be checked in each the user and document pool columns for the jobs to appear to the typist.

Location – Use to filter by location. To select a specific location, click on it and select ‘add’ to move it to the ‘Selected Locations’ area. Use shift+click and alt+click to select more than one location. To add all current locations, click ‘add all’.

Remove Pool <Client – Pool Name>

This link removes the pool selected from the pool list.

Pool Assignment Summary

This table will give a summary of what client, priority, users, document type, and location combinations the typist can transcribe.

Client	Priority	User Pools	Document Pools	Locations
AEMQA	1	Pool Cat A - Default User Pool	Default Document Pool	All Locations
ESODemo	1	Default Category - Default User Pool, Default Category - Another Dictating Pool	Default Document Pool, Second Doc Pool, !@#-Doc Pool, 121 < cc > < z-pool, 11, 12	All Locations
IMFTEAM	1	Default User Pool	Default Document Pool	All Locations
test3	1			All Locations
xyztest	5	Default Category - All Doctors	All Document Types, CN	All Locations
testclient1	6	Default User Pool, M*Modal cmltdrft, Rich, VR Sales Demo	Default Document Pool, Chart, XSL Doc Pool	All Locations

View Reports Access for <Selected Transcriptionist>


 [View Reports Access for ETRAIN2](#)

This link allows you to select which reports the transcriptionist has access to. The transcriptionist must have 'InVision Tab' selected in Edit Setup for <Selected Transcriptionist> > InCommand Security Roles.

Reports Access
This is a listing of the reports that the current transcriptionist has access to

- + Production Reports
- + Miscellaneous Reports
- + Performance Reports
- + ShadowScribe Reports

Production Reports

Production Reports	
Report	Status 
Transcriptionists	<input checked="" type="checkbox"/>
Transcriptionists (Classic)	<input checked="" type="checkbox"/>
Transcriptionist Production Summary	<input checked="" type="checkbox"/>
Client Production Report	<input checked="" type="checkbox"/>
Client Production Detail Report	<input checked="" type="checkbox"/>
Fax Client Billing Report	<input checked="" type="checkbox"/>
Production Detail Reports	<input checked="" type="checkbox"/>
Outsourced To	<input checked="" type="checkbox"/>
Outsourced From	<input checked="" type="checkbox"/>
Turnaround	<input checked="" type="checkbox"/>

Transcriptionists and Transcriptionists Classic – These reports lists all production by your transcriptionists & QA staff (does not include any production by Outsourced Transcription Companies). Some transcriptions will be listed more than once on this report (once for transcription and another for QA). Please do not use this report as a total line count performed for your company (Use the Client Report).

Transcriptionist Production Summary – This report provides a production summary for all transcriptionists within a specified time period.

Client Production Report – This report shows line production for Clients that are directly contracted with you. It will NOT list outsourced work done by your company.

Client Production Detail Report - This report shows all transcription production within a specified time period. This report can show detail (each transcription) or summary information. It can be sorted by date delivered or date dictated. This report also displays a Faxing Detail Report which shows a summary of faxes.

Fax Client Billing Report – This report lists all faxes sent within a given date range by client and the total charges to bill for each fax sent.

Production Detail Reports – This is a set of six reports that shows production details on transcriptions performed in a given date range.

Outsourced To – This report lists transcriptions that your company has outsourced to other transcription companies to type.

Outsourced From – This report lists transcriptions that were outsourced to your transcription company.

Turnaround – This report shows a turnaround time for each transcription and includes weekends, holidays, and is based on a 24-hour clock.

Turnaround Compliance – This report shows the turnaround time for reports, and how that compares with the required turnaround time defined by each document type.

Turnaround Summary – This report shows a statistical summary of turnaround by client and document type for a given date range.

Turnaround Summary by MT – This report shows a statistical summary of turnaround by transcriptionist and document type for a given date range

Turnaround Summary by Outsource – This report shows a of turnaround by outsource company for a given date range.

ASP Charges – This report shows all ASP charges generated within the time frame specified. ASP charges include both base ASP fees and Outsourced ASP fees (if applicable). The report displays a detailed billing description followed by a summary of total lines and the amount billed for all clients.

Fax ASP Billing Report – This report lists all faxes sent within a given date range by client, and the ASP cost for each fax sent.

Net Profit – This report is extremely powerful if used correctly. It lists each transcription that was typed by your transcription company and deduct the transcriptionists & QA fees as well as any outsourced transcription fees and ASP fees. This report will not work properly unless each transcriptionist and QA personnel has a rate associated for each client they transcribe. The report can show you how much profit is realized for each individual transcription. It can be extremely helpful to identify problem dictators who require more labor resources, thus reducing your profit margin.

InTouch Usage – This report shows the InTouch Usage for your InTouch system by other companies.

Monthly Billing Units – This report shows total lines and cost for reports by Document Type and Dictation Source.

User Totals Report – This report shows a listing by client and user of the total number of lines and transcriptions performed within a given date range.

Stat Reports – This report lists all reports that were Stat within a given date range.

Workflow Monitor – This report shows the times and lengths of time that reports are in various stages of the workflow.

Workflow Listing – This report lists and totals reports by client that have been processed through the selected workflow phase.

Fax Status Report – This report lists all faxes generated during the specified date range and displays their status.

QT Monitor Report – This report calculates the difference between the QT characters that are delivered to the client and the QT characters that were part of the original document template used for the transcription. The primary purpose is to determine if an MT is deleting QT characters and replacing with standard characters. This is also a good report to calculate the savings for each client where you are utilizing Qualified Text.

Outstanding Jobs - This report lists all outstanding jobs received within a given date range.

Dictation Count & Types - This report determines how many dictations were processed by a transcription company for each user for a particular day. It also lists the type of dictation based on its source, such as iPhone, Android, Recorder and InTouch.

Jobs Marked for Review - This report lists all jobs that were delivered within a given timeframe and were marked for review.

Client Billing Breakdown – This report shows a breakdown of billing by Client.

Transcription History Report – This report shows all transcription history within a specified time period.

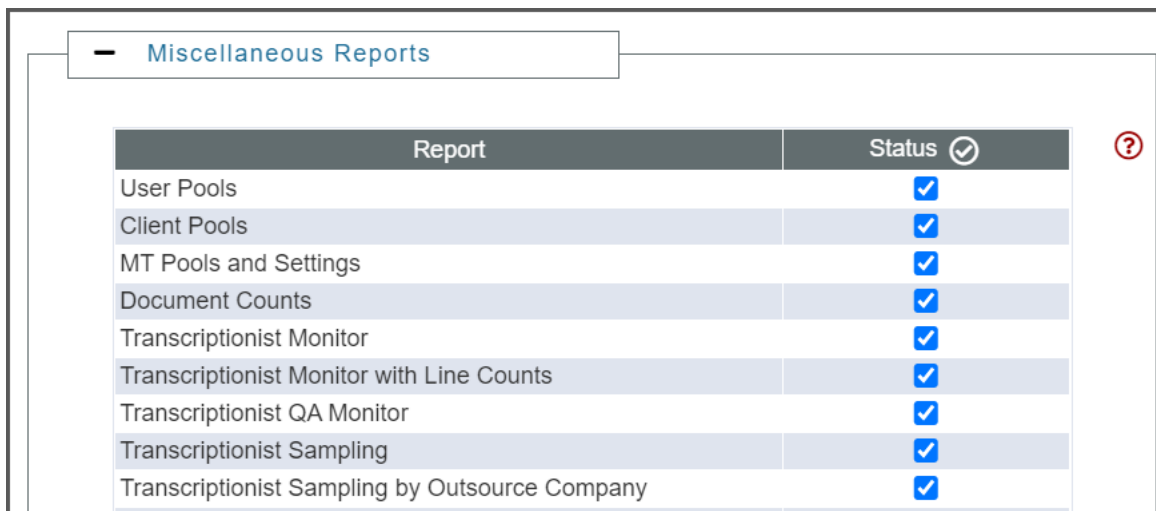
Transcription Listing & Transcription Listing (Classic) - These reports shows all transcription production within a specified time period.

MT Productivity Summary Report - This report displays a summary of MT productivity.

STAT Analysis – This report shows the number of STAT jobs, non-STAT jobs, and percentage of jobs for a given date range.

Language Access Report – This report shows the number of sessions, interpreters, and session duration for a given date range.

Miscellaneous Reports



The screenshot shows a web interface with a header "Miscellaneous Reports" and a table below it. The table has two columns: "Report" and "Status". All reports in the table have a blue checkmark in the "Status" column. A red question mark icon is visible in the top right corner of the table area.

Report	Status
User Pools	✓
Client Pools	✓
MT Pools and Settings	✓
Document Counts	✓
Transcriptionist Monitor	✓
Transcriptionist Monitor with Line Counts	✓
Transcriptionist QA Monitor	✓
Transcriptionist Sampling	✓
Transcriptionist Sampling by Outsource Company	✓

User Pools – This report lists each clinician (dictator) and the personnel within your company who have access to them for transcription or QA. If you outsource all of your work to other transcription companies, this report will not return any results.

Client Pools – This report lists each dictator and the pools they belong to.

MT Pools and Settings – This report displays (by MT) a listing of Pools that the MT has access to, and the settings configured against these pools.

Document Counts – This report shows the number of documents done by Location, Department and Document Type for a Client.

Transcriptionist Monitor – This report shows the activity of a given transcriptionist.

Transcriptionist Monitor with Line Counts - This report shows the activity of a given transcriptionist with line counts.

Transcriptionist QA Monitor – This report lists each transcriptionist and shows what percentage of jobs that typist had go through to QA.

Transcriptionist Sampling – This report selects a subset of reports for a given typist so that they can be randomly reviewed.

Transcriptionist Sampling by Outsource Company – This report selects a subset of reports for a given outsource company so that they can be randomly reviewed.

Additional Line Setup Report – This report lists the number of Additional Lines configured for your Document Types.

Provider Line Count – This report lists the line counts for all transcriptions dictated in the specified date range. It also shows a summary for each Provider on each day along with totals for each Provider and Client.

Client Queue – This report lists each client, the number of jobs at each level of QA, and the typists with jobs currently checked out for that client.

Lines by QA Level – This report shows how many lines were reviewed at each level of QA by client for a given date range.

User Code Listing – This report lists all user codes in the system for selected clients.

No Dictation Activity Report – This report shows dictating users with no dictation activity between two dates, across multiple clients or select client.

No Login Activity Report – This report shows non-dictating users with no login activity between two dates, across multiple clients or select client.

InSync Versions – This report shows the InSync versions being used for each client by workstation as well a list of users that upload dictations from that workstation.

Contact Listing – This report provides a listing of all contacts for the clients of your company.

Notifications Listing – This report provides a listing of all users that have preliminary notifications turned on for the clients of your company.

InScribe Versions & InScribe Versions (Classic) – These reports give the version number and workstation of all transcriptionists InScribe installations.

Geographic Location for InScribe Login – This report shows all geographic locations for InScribe logins within a specified time period.

Transcriptionist Pool Listing – This report provides a listing of all Pool/User/MT combinations that are currently configured for a given client.

Active Dictation Template Listing Report – This report provides a listing of active dictation templates filtered by client and/or user.

Active MT Report – This report displays a list of active transcriptionists, their contact information, and their QA Level.

Template Character Count – This report displays all standard and QT characters contained within document or dictation templates.

QA Level Summary – This report shows how many transcriptions were reviewed at each level of QA for each transcriptionist in a given date range.

QA Summary By Client – This report shows a summary of QA ratings by client.

QA Summary By MT – This report shows a summary of QA ratings by MT.

QA Ratings Scored By MT - This report shows the final scores for each transcription and summarizes the results by MT within a given date range.

Feedback Status Report – This report assists in monitoring MT usage of the feedback feature. It shows the total number of feedback items per MT and the number of those not yet reviewed by the MT.

MT Rates - This report lists the pools and rates for each MT.

Help Desk Tickets – This report lists all tickets recorded by the DeliverHealth Help Desk against your MTSO or Clients.

Template Listing – This report lists the dictation or document templates for your Clients.

Rate Listing Report – This report lists the rates setup for each client, along with details of modifiers by Document Type and User.

Comment Tag Analysis - This report shows Comment Tags as they were delivered to the client, compared to the Comment Tags that are currently assigned to reports. The Grouping options for Original and Current Tags cannot be used simultaneously.

Transcription Comments - This report shows any transcription within the time frame specified that have a 'comment' attached. Comments are used by the transcription company or clinician to bring information to the attention of the user viewing the transcription. With this report, a user is able to see all comments at one time.

Action Audit Report - This report can be used to verify certain actions have been taken in a given workflow folder. An example of this would be to get a list of transcriptions that were completed from a folder but never printed.

Appointment Resource Comparison Report - This report lists all Patient Appointments that were uploaded with a Dictation ID, and matches the appointment up with an existing Transcription, based on the Resources assigned to Users using the Appointment Resources functionality.

MT Validation Rules Action Monitor Report - This report lists all the Validation Rule failures that occurred for a given date range.

Invalid Report - This report lists all reports within 90 days that were invalidated in a given date range. The "%" symbol can be used as a wildcard for the multiclient filter. Can lookup Receipt Codes with this report as well.

Blanks Detail Report - This report shows transcription-level details plus summary statistics for transcriptions delivered within the selected time period that have blanks. The default layout is summarized by MT so you can determine if any MT's are having problems with blanks. Details include Number of blanks, if Marked for QA, if Marked for Review, the Trigger for Marked for Review and the Comment Tags on the Transcription. You can customize this report by adding or removing columns and changing how information is Sorted, Grouped, and Summarized.

Blanks Summary Report - This report produces summary statistics on the number of transcriptions with blanks, % of transcriptions with blanks, and total number of blanks. The Sorting, Grouping, and Layout options allow you to quickly summarize by the MTs in your MTSO and obtain a summary of your Outsource Vendor (if used.) in the default layout, Summarize by Production Company (your MTSO and Outsource Vendors), and other pre-defined layouts to see if high number of blanks are related to specific document types, dictators, or MTs. You can also add or remove columns for this Custom Column Report. Set Hide Details to Off to get the TID-level details.

Performance Reports

Report	Status
Client Volume	<input checked="" type="checkbox"/>
Daily Volume	<input checked="" type="checkbox"/>
Hourly Volume	<input checked="" type="checkbox"/>
Monthly Volume	<input checked="" type="checkbox"/>
Top Days	<input checked="" type="checkbox"/>
Transcription Volume	<input checked="" type="checkbox"/>

Client Volume – This report produces a chart that provides a visual representation of the volume of transcriptions going through the system for each client within a given date range. This report can be used to compare volume across clients.

Daily Volume – This report produces a chart that provides a visual representation of the volume of transcriptions going through the system on a daily basis. This report can be used to compare volume per day across a given date range and can help identify peak and low volume trends for your organization.

Hourly Volume – This report produces a chart that provides a visual representation of the volume of transcriptions going through the system on an hourly basis for a given time frame. This report can be used to show at what times of the day your organization experiences its peak and low volumes.

Monthly Volume – This report produces a chart that provides a visual representation of the volume of transcriptions going through the system on a monthly basis. This report can be used to compare volume from month-to-month, and up to a given day in each month to help track performance over time.

Top Days – This report produces a chart that provides a visual representation of the top 10 days of transcription volume within a given date range. This report can be used to track times of the year that have higher volumes, or to track business growth in general.

Transcription Volume - This report shows the number of reports, lines of transcription, and minutes of dictation for given date ranges.

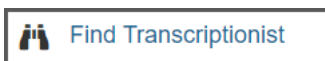
ShadowScribe Reports

ShadowScribe Reports	
Report	Status
ShadowScribe Usage	<input checked="" type="checkbox"/>
ShadowScribe Author and MT Details	<input checked="" type="checkbox"/>

ShadowScribe Usage - This report shows the number of dictation minutes processed by the ShadowScribe engine by author and document type.

ShadowScribe Author and MT Details - This report will list all ShadowScribe transcriptions for a given date range and give detailed information about the status of each job.

Find Transcriptionist



This link will allow you to search within transcriptionists at your company by Transcriptionist ID, Transcriptionist Username, and/or Transcriptionist Last Name. Type in the appropriate fields and press Search. Below the search criteria will appear a Transcriptionist List with only typists that match your search criteria.

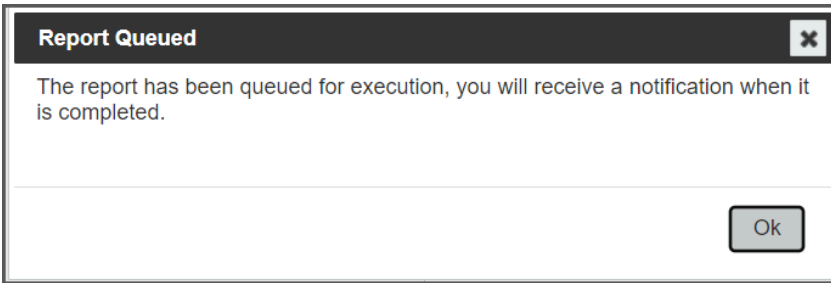
Find Transcriptionist
Please specify transcriptionist username, last name or ID and press search

Transcriptionist ID	<input type="text"/>
Transcriptionist Username	<input type="text"/>
Transcriptionist Last Name	<input type="text"/>

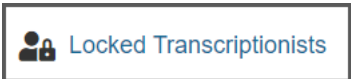
MT Rate Inventory Report



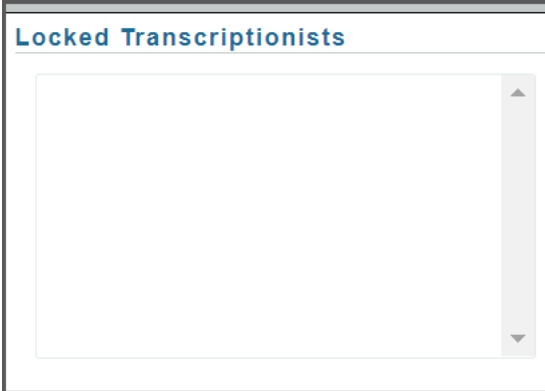
Clicking this link will prompt you to open or save an Excel Document named MTRateInventoryReport.xls. This report includes all rate information for MTs, including their default rates and client specific rates.



Locked Transcriptionists



This link will allow you to see all transcriptionists whose accounts have been locked from login due to entering the incorrect password.



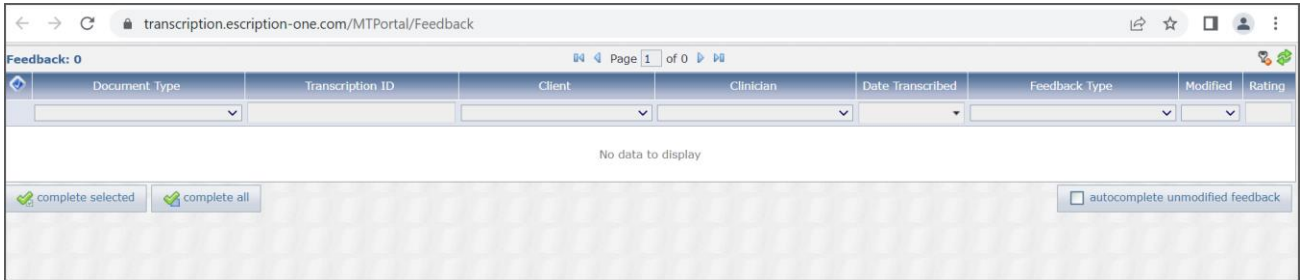
Select the name and press the 'Unlock Selected Transcriptionist' button to allow the transcriptionists the ability to log in.

Maintenance > Software

This tab takes you to the website <https://www.escription-one.com/software> in a new internet window when clicked.

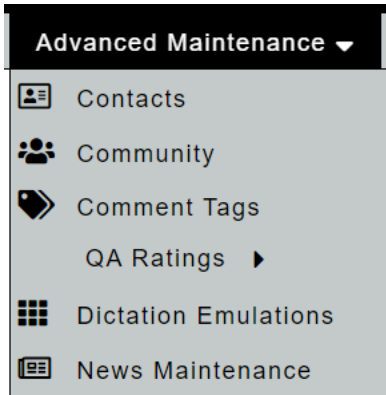
Maintenance > MT Feedback

Opens the MT Portal where you can review and complete feedback items.



Maintenance > Advanced Maintenance

This tab opens a drop-down menu where you can select maintenance options for Contacts, Community, Comment Tags, QA Ratings, Dictation Emulations, and News Maintenance.



Maintenance > Advanced Maintenance > Contacts


Select **Contacts** to edit or view the contacts for your transcription company. This box includes all company contacts for which you can enter maintenance. Select the contact in this box and then click a link below to enter into the specific section of maintenance needed. You can use the check boxes below the list to specify which contact(s) should be included in the list: Primary, Technical, Billing, Owner, and VR contacts.


Contacts List


Company Contacts

Test, Test

- Show Primary Contacts
- Show Technical Contacts
- Show Billing Contacts
- Show Owner Contacts
- Show VR Contacts

 [Add New Contact](#)

 [Edit Selected Contact](#)

 [Delete Selected Contact](#)

Add New Contact



This link allows you to enter a new contact into the system for your company. Required fields are Name, Phone, E-Mail, and Contact Type.

Edit Selected Contact



This link allows you to view and make changes to an existing contact for your company.

Delete Selected Contact




This link allows you to delete an existing contact for your company.


Note: You cannot delete the last Primary Contact for your company. Please create a new contact that is designated as Primary before deleting the existing Primary contact.

Maintenance > Advanced Maintenance > Community

Selecting the **Community** option allows you to edit or view information about other transcription companies for use with outsourcing. Your current status as visible or not visible is displayed here.

 Your company is currently **not visible** in the Global Community.

View Companies which can assign you work

 [View Companies which can assign you work](#)

This link will display a list of companies which can outsource work to your company.

Granted Transcription Companies
Transcription Companies that can assign work to your company

DHS Product Management TEST

Emdat Demo TEST

Emdat Helpdesk TEST

Gray Transcription TEST

+ [Add a Transcription Company to list by Code](#)

x [Revoke Rights from Company](#)


Add a Transcription Company to list by Code

Use this link to add another transcription company who will be able to assign your company work. That company can find the necessary code here: Maintenance > Defaults > Transcription Company Information > Company Code.

Revoke Rights from Company

Use this link to remove a company from the list of companies that can assign you work.

View Global Community

 [View Global Community](#)


This link will display a list of transcription companies who have their current status as Visible.

Global Community
Transcription Companies which can be contacted for an outsourcing relationship

Emdat


 [View More Information About Company](#)

View More Information About Company

 [View More Information About Company](#)

This link will open a new window that takes you to the webpage the selected company has setup in Maintenance > Defaults > Transcription Company Information > Community Web Address.

Toggle Visibility in the Global Community

 [Toggle Visibility in the Global Community](#)

This link will toggle your status as Visible or Not Visible in the Global Community. Companies that are visible show up in the list View Global Community above.

Maintenance > Advanced Maintenance > Comment

Tags

Comment tags allow transcriptionists to assign pre-determined comments to transcriptions. This section will allow you to manage what comments are available and for which clients. Comment tags allow faster identification of common transcription issues in both InScribe and InQuery.

Comment Tags List

This box includes all comment tags for which you can enter maintenance. Select the comment tag in this box and then click a link below to enter into the specific section of maintenance needed. You can use the check box below the list to include comment tags that are inactive. Inactive comment tags appear in gray.

Comment Tags

Audio Issues

Audio Not Played

Audio Not Played Completely

Audio Test

Audio Violation

Bills Comment

Bills Comment BG

Blanks

Blanks

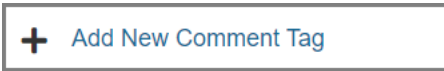
Chart Note

Show Inactive Tags

[+ Add New Comment Tag](#)

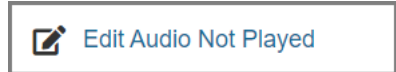
[✎ Edit Acct # or Appt ID Missing](#)

Add New Comment Tag



This link allows you to enter a new Comment Tag. Options set here can be edited within the Edit <Selected Comment Tag> section. Please see below for more information.

Edit <Selected Comment Tag>



Clicking this link allows you to edit the options of the comment tag that has been selected in the Comment Tags List.

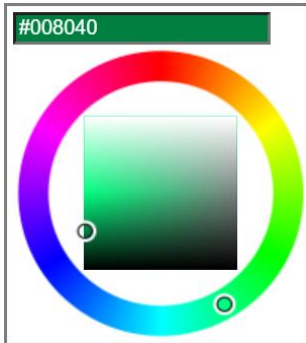
Edit Audio Not Played

Tag ID	1586
Tag Name	<input type="text" value="Audio Not Played"/>
Tag Color	<div style="display: flex; align-items: center;"> <div style="background-color: #008040; width: 30px; height: 15px; margin-right: 5px;"></div> <div style="font-family: monospace; font-size: 12px;">#008040</div> </div>
Active	<input checked="" type="checkbox"/>
All Clients	<input type="checkbox"/>
Assigned Clients	Available Clients
<div style="background-color: #f0f0f0; padding: 2px;">DRW</div> <div style="background-color: #f0f0f0; padding: 2px;">ESODemo</div>	<div style="display: flex; justify-content: center; gap: 10px; margin-bottom: 5px;"> ← add all ← add remove → remove all → </div> <div style="background-color: #f0f0f0; padding: 2px;">01Test</div> <div style="background-color: #f0f0f0; padding: 2px;">02Test</div> <div style="background-color: #f0f0f0; padding: 2px;">03TEST</div> <div style="background-color: #f0f0f0; padding: 2px;">abcd</div> <div style="background-color: #f0f0f0; padding: 2px;">ABCMM</div>

Tag ID – This is a non-editable internal ID number for the comment tag.

Tag Name – This is the identifying name for the type of error / comment that can be assigned to the transcription. Make sure to make this descriptive enough so that any information that is needed can be learned by this field.

Tag Color – This is the color that the comment tag will appear in the InQuery Review folder(s). This is used for quick identification of errors. Drag the dots around the outer circle and the square to customize the color.



Active – This checkbox determines if the typists and InQuery users will see this as an available tag.

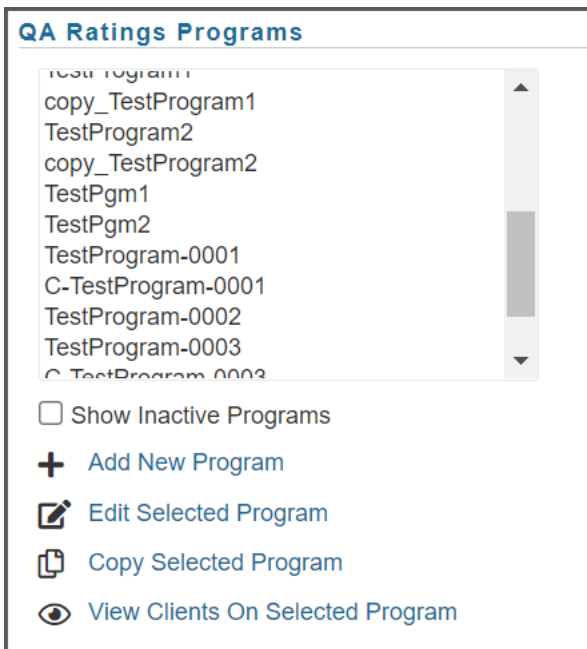
All Clients – Use this checkbox if this Comment tag will be available to all clients.

Assigned Clients – If the All Clients check box is not checked, use this interface to determine which clients will use the comment tag. Clients in the left box will have the comment tag available. To add or remove clients select the client in the list then press the arrow button to add or remove.

Maintenance > Advanced Maintenance > QA Ratings > Programs

QA Ratings Program List

This box includes all the QA Ratings programs that have been set up for your company. You can use the check box below the list to include 'Inactive Programs'. Inactive programs appear in gray.



Add New Program

[+ Add New Program](#)

Clicking this link brings up a prompt asking if you would like to start with the eScription One Default Program. If you select Yes, you will be taken to the Add New QA Ratings Program with the default program already filled in. If you select No, then you will be taken to a blank Add New QA Ratings Program screen on the right side of the window. All of these settings can be edited within the Edit Existing Program section after creation.

Edit Selected Program

[Edit Selected Program](#)

Edit QA Ratings Program

Program Name *

Program Description

Program Active

Rating Description	Category	Error Value	Shortcut	Active	Action
Medical Word Misuse	Critical	3	M	Active	^ v ✎ ✕
Omitted Dictation	Critical	3	O	Active	^ v ✎ ✕
Patient ID Error	Critical	3	I	Active	^ v ✎ ✕
Upgrade of Major or Minor	Critical	3	U	Active	^ v ✎ ✕

Program Name – This is a required field and is used for identification purposes.

Program Description – This can be a lengthier description of the program.

Program Active – Use this box to select whether the program will be active or inactive.

To add a new error type:

- Type the name in the rating description.
- Select the category of error (Critical, Major, Minor, Dictator Effect, Administrative).
- Type the error value.
- Select a keyboard shortcut, if any.
- Select if it will be active or inactive.
- Press the Plus button.

Error types that have already been added can be moved up or down in the list with the up and down arrows, edited using the page icon, or deleted with the red X icon.

Copy Selected Program



This link copies all of the settings from the selected program and create a new program with the Program Name and Program Description typed into the fields.

View Clients On Selected Program



This link displays which clients have the selected program setup in Maintenance > Clients > Edit Relationship with <Selected Client> > QA Program > Client Default Program. Click on the client name to expand the section to see which document types are on the specific programs.

Maintenance > Advanced Maintenance > QA Ratings > Pay Modifiers

QA Pay Rate Modifiers List

This box includes all the QA pay rate modifiers that have been set up for your company. You can use the check box below the list include inactive programs in the list. Inactive programs appear in gray.

QA Pay Rate Modifiers

Create QA Rate Modifier programs to use to adjust the per-line-rate paid to MTs based on their typing performance (QA Rating). The rates created here are added to or subtracted from the Rates for the MT that are defined in their MT Pool.

Feedback Only Rate Modifier ▲

Sample 01

Sample 02

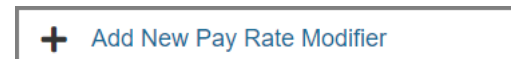
Modifier01 ▼

Show Inactive Modifiers

+ Add New Pay Rate Modifier

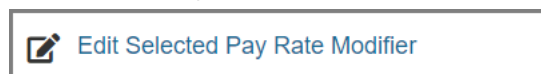
Edit Selected Pay Rate Modifier

Add New Pay Rate Modifier



Clicking this link will bring the edit screen for a new pay rate modifier. All of these settings can be edited within the Edit Selected Pay Rate Modifier section after creation.

Edit Selected Pay Rate Modifier



Edit QA Pay Rate Modifiers ?

Name

Modifier Active

Rating	Modifier	Action
100%	0.008	edit remove
90%	0.005	edit remove
75%	-0.0025	edit remove
30%	-0.005	edit remove
10%	-0.003	edit remove
0%	-0.1	edit

When the quality of a transcription meets or exceeds %

Apply a modifier of + add

Name – This is a required field and is used for identification purposes.

Modifier Active – Use this box to select whether the program will be active or inactive.

To add a new error type:

- Type the percentage where if the transcription meets or exceeds this value, the modifier will be activated.
- Type the modifier that will be activated for the above percentage.
- Press the Add button.

Modifiers that have already been added can be edited using the page icon, or deleted with the red X icon.

Note: Positive Rate Modifiers are added to the MT Rate for payment (such as +0.01) while negative Rate Modifiers are subtracted from the MT Rate for payment (such as –0.0075).

Advanced Maintenance > Dictation Emulations

An InTouch Emulation controls the user’s experience with the InTouch system. The emulation consists of a mapping of keys to functions as well as a set of options determining what information a user will be prompted to enter. In InCommand you can add, edit, and copy an emulation.

Dictation Emulations

th-landOAssigned

th-landOAssignedExtraPrompt

th-landONotAssigned

th-InsertAssigned

th-IOASearchAll

th-IOASearchAll_noLoc

th-Most Options

th-OverwriteAssigned

th-test

th-test

th-test COPY

+ Add New Dictation Emulation

✎ Edit Dictation Emulation

📄 Copy Dictation Emulation

Add New Dictation Emulation

[+ Add New Dictation Emulation](#)

Assign a unique name for the emulation Then open the drop-down menu under each number to assign InTouch functions to the telephone keys.

Add New Dictation Emulation ?

Emulation Description *

Key Assignment ■ - required action ■ - not required action

<input checked="" type="checkbox"/> Record action is not assigned! <input checked="" type="checkbox"/> Play action is not assigned! <input checked="" type="checkbox"/> Stop action is not assigned! <input checked="" type="checkbox"/> Done action is not assigned! <input checked="" type="checkbox"/> Help action is not assigned!	1	2	3	A
	▼	▼	▼	▼
	4	5	6	B
	▼	▼	▼	▼
	7	8	9	C
▼	▼	▼	▼	
*	0	#	D	
▼	▼	▼	▼	

Prompts

Action	Prompt	Audio
+	Document Type ▼	

Extra Prompts

Action	Prompt Audio	Recording Audio
+	Please dictate the Ordering Physician ▼	

Supports Dictation Review

Play Menu When Idle

Menu Delay Seconds

Menu Beep While Idle

Play Stopped Prompt

Default Recording Method

Rewind Seconds

Fast Forward Seconds

Minimum Tone Length

Stop On All Tones

Play Receipt Code

Silence Detection Seconds

Trim Silence

Automatic Gain Control

Volume Boost

Edit Dictation Emulation



Click this option to edit an existing emulation.

Edit Dictation Emulation			
Emulation Description *	<input type="text" value="AMM test"/>		
Key Assignment	- required action		
	1	2	3
	Record	Play	Done
	4	5	6
	STAT	Rewind	Fast Forward
			A
			B

Copy Dictation Emulation



Click this option to create a copy of an emulation.

Advanced Maintenance > News Maintenance

Show News for <Pull Down Menu>

The 'Show News for' pull-down menu allows you to view news items for all clients or to view news items for one client. Below the menu, are all news items that have been set up for your company. Use the check box below the list to include news items that are out of date range. Out of range news items appear in gray.

Management	Maintenance	InVis
Defaults	Clients	EDEMO's Outsc
News Items		
Show News for	<input type="text" value="Show All News"/>	
Welcome to InQuery (2/10/2022)		
<input type="checkbox"/> Show Out of Range Items		
+ Add News Item		
✎ Edit Welcome to InQuery (2/10/2022)		
📄 Copy Welcome to InQuery (2/10/2022)		
✕ Delete Welcome to InQuery (2/10/2022)		

Add News Item

[+ Add News Item](#)

This link brings up the edit screen. Use the edit screen to create a news item. All of these settings can be edited within the Edit section after creation.

Edit<News Item Title>

[Edit Welcome to InQuery \(2/10/2022\)](#)

This link allows you to edit the selected news item.

Edit Welcome to InQuery

Title	<input type="text" value="Welcome to InQuery"/> *																		
Description	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Welcome to InQuery. Please contact client support with any questions or issues. </div> *																		
Url	<input type="text"/>																		
Start Date	<input type="text" value="2/10/2022"/> *																		
End Date	<input type="text" value="2/28/2025"/> *																		
Show To	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Dictating Users <input checked="" type="checkbox"/> Non-dictating Users <input checked="" type="checkbox"/> Administrator <input checked="" type="checkbox"/> Attending <input checked="" type="checkbox"/> Medical Records <input checked="" type="checkbox"/> Nurse <input checked="" type="checkbox"/> Resident <input checked="" type="checkbox"/> Secretary 																		
Clients	<input type="checkbox"/> All Clients <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #444; color: white;"> <th style="width: 30px;"><input checked="" type="checkbox"/></th> <th>Name</th> <th>Full Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>01Test</td> <td>01Test</td> </tr> <tr> <td><input type="checkbox"/></td> <td>02Test</td> <td>02Test</td> </tr> <tr> <td><input type="checkbox"/></td> <td>03TEST</td> <td>03Test</td> </tr> <tr> <td><input type="checkbox"/></td> <td>abcd</td> <td>abc</td> </tr> <tr> <td><input type="checkbox"/></td> <td>ARCM</td> <td>ABC Medical Center</td> </tr> </tbody> </table>	<input checked="" type="checkbox"/>	Name	Full Name	<input type="checkbox"/>	01Test	01Test	<input type="checkbox"/>	02Test	02Test	<input type="checkbox"/>	03TEST	03Test	<input type="checkbox"/>	abcd	abc	<input type="checkbox"/>	ARCM	ABC Medical Center
<input checked="" type="checkbox"/>	Name	Full Name																	
<input type="checkbox"/>	01Test	01Test																	
<input type="checkbox"/>	02Test	02Test																	
<input type="checkbox"/>	03TEST	03Test																	
<input type="checkbox"/>	abcd	abc																	
<input type="checkbox"/>	ARCM	ABC Medical Center																	

Title – The Title will appear in the blue bar along with the start date in the news section of the InQuery home page. This is a required field.

Description – This field holds the body of the news item. It appears beneath the blue bar. This is a required field and cannot be more than 500 characters.

URL – This field holds a link to external content for the news item. It must begin with “http://”, “https://”, or “mailto:”

Start Date – This field holds the first date the news item will be shown in the InQuery home page. It is a required field in m/d/yyyy format.

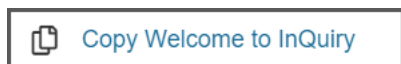
End Date – This field holds the last date the news item will be shown on the InQuery home page. It is a required field in m/d/yyyy format.

Show To – These checkboxes control the type of users to whom the news items will be shown. These settings are found in Client Maintenance > User Maintenance > Edit User > User Information > User Type and Client Maintenance > User Maintenance > Edit User > Dictating Clinician Options > User Dictates.

Note: To allow all users to see the notes, you can select both Dictating and Non-Dictating users.

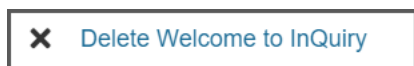
All Clients – Check this box to show this news item to all clients. If this box is unchecked then you will be able to select specific clients a grid below this option.

Copy <News Item Title>



This link copies all of the information from the selected news item and create a new news item with “Copy of” added to the beginning of the title field.

Delete <News Item Title>



This link will delete the selected news item. After clicking the link a confirmation window appears asking you to select OK or Cancel.

InVision

Reports

The full report list is located in [View Reports Access for <Selected Transcriptionist>](#). Access to reports is determined by the settings found in these two locations:



- Maintenance > Transcriptionists > Edit Setup for <Selected Transcriptionist> > InCommand Security Roles > InVision Tab
- Maintenance > Transcriptionists > View Report Access for <Selected Transcriptionist>

Clicking on a report will take you to the New Report tab.

The options available to customize will vary depending upon which report is chosen. For further information on any option, click the red ? to toggle the additional information on and off.

New Report

The report parameters in this section will change depending on what report is selected to run. Parameters with a red asterisk beside the name are required.

- Report Parameters	
Start Date *	6/1/2022 
End Date *	9/1/2022 

For Reports to be run immediately: enter a date as 'm/d/yyyy', such as 6/01/2022, or click the Calendar control button and select the date from the pop-up calendar.

Beneath the calendar, you can select relative system dates. All relative dates are dependent on the date when the report actually runs.

The available relative dates are:

- **Today** – @Today
- **Yesterday** – @Today – 1
- **First Day of Current Month** – @FirstOfMonth
- **First Day of Previous Month** – @FirstOfPreviousMonth
- **Last Day of Previous Month** – @LastOfPreviousMonth
- **First Day of Current Quarter** – @FirstOfQuarter
- **First Day of Previous Quarter** – @FirstOfPreviousQuarter
- **Last Day of Previous Quarter** – @LastOfPreviousQuarter

Report Schedule

- Report Schedule	
Schedule Name *	Turnaround Compliance
Format	PDF
Active	<input checked="" type="checkbox"/>
Notification	<input checked="" type="checkbox"/> On-Screen <input type="checkbox"/> Email <input type="text" value="j@deliverhealth.com"/>
Schedule Options	Queue Now

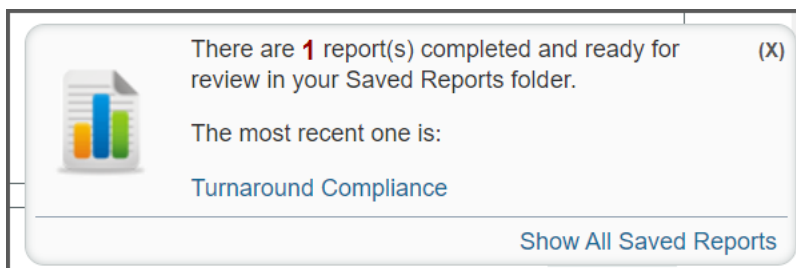
Schedule Name – Use this field to give the report a unique name that will be recognizable in the list of saved reports.

Format – The following formats are available:

- **CSV** – ‘Comma-separated values’ reports contain the raw report data in comma-separated fields. These reports can be opened in Excel.
- **Excel** – Excel format. These reports can be opened in Excel.
- **MHTML** – ‘MIME HTML’ reports will open using Internet Explorer*****Is this format still supported?** when viewed.
- **PDF** – ‘Portable Document Format’ reports will open using your default PDF viewer.
- **XLSX** – Excel Open XML Spreadsheet. These reports can be opened in Excel and other spreadsheet apps.
- **XML** – ‘Extensible Markup Language’ reports contain the raw report data in XML format.

Active – Use this checkbox to determine if the scheduled report will be active. Inactive reports will still be added to the scheduled reports tab, but will not run automatically. They can still be run manually, though.

Notification – Check one or both options to configure how you would like to receive notification that your report is ready. On-Screen will produce a popup in the lower right-hand corner when the report is ready to view. Email will send an email notification to all email addresses entered in this box. If more than one email is entered, separate each by a comma.



Schedule Options – Select how often and when you want the report to run.

Reports can be run immediately or scheduled to run once or on a reoccurring basis.

Queue now – Select this option if you want to run the selected report now without the results going into the Scheduled Reports tab. Once completed, a notification will be presented either on screen or by email, depending on the preference

chosen and the report will be presented in a new Internet browser window. Reports can be saved as a file after they are complete.

Schedule – Select this option for reports that will take longer to run, need to be run on a reoccurring basis, or need to run at a specific time sometime in the future. Reports that are scheduled will appear in the Scheduled Reports tab. Scheduled reports are saved as files and once complete can be downloaded in the Saved Reports tab. More information on configuring a scheduled report is available in Schedule.

Schedule

If you choose the Schedule option from the Schedule Options drop down box, you will be presented with additional configuration options.

- **Once** – The report will run a single time and be added to the user's Saved Reports.
 - **Now** – The report will run immediately.
 - **On** – The report will run at the specified date and time.
- **Daily** – The report will run every day based on schedule criteria, report will appear in Saved Reports each time the report is run. You can select what time the report will run on the days scheduled.
 - **Every __ Day(s)** – The report will run every X days depending on the value entered. Maximum entry is every 6 days.
 - **Every Weekday** – The report will run every weekday.
- **Weekly** – The report will run every week based on schedule criteria, report will appear in Saved Reports each time the report is run. You can select what time the report will run on the days scheduled.
 - **Every __ Weeks(s)** – The report will run every X week depending on the value entered. Maximum entry is every 52 weeks.
 - **On** – The report will run on the selected day(s) of the week.
- **Monthly** – The report will run every month based on schedule criteria, report will appear in Saved Reports each time the report is run. You can select what time the report will run on the days scheduled.
 - **Day(s) __ of every __ month(s)** – User can select that the report run on a certain day or days (comma delimited list of days) of every X months. Maximum entry is every 12 months.
 - **The __ of every __ month(s)** – User can select that the report run during a specific week on a specific day of every X months. Maximum entry is every 12 months.

Scheduled Reports

The Scheduled Reports tab lists the reports you have scheduled in the InVision > New Report > Report Schedule section of InCommand. The list is very customizable so that you can easily find the report based on specific criteria.

Management		Maintenance		InVision		Client Maintenance		Inquiry	
Reports			Scheduled Reports			Saved Reports			
Page 1 of 1 Choose Columns Clear Filters Refresh									
Drag a column header here to group by that column									
☑	Actions	Description	Format	Last Run	Next Run	Status			
		<input type="text"/>	<input type="text" value="PDF"/>	<input type="text" value="12/7/2022 3:00 PM"/>	<input type="text" value="12/7/2022 3:00 PM"/>	<input type="text" value="New"/>			
	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Turnaround	PDF						

Grouping Section – Click and drag an available column to this area to group reports by that column’s criteria.

Drag a column header here to group by that column

Column Names – Click on a column to sort by that column. Columns can be added or removed using the Choose Column button discussed below. The available columns are: Category, Last Modified, Modified By, Owner, Owner ID, Is Active, Description, Format, Last Run, Next Run, Status, and Report.

Description	Format	Last Run	Next Run	Status
-------------	--------	----------	----------	--------

Filtering Row – This row allows you to input specific information into the available columns to limit your results by those criteria. To enter search criteria, type the information or use the drop-down menu in the appropriate column. The results will automatically refresh when you click or tab out of the field.

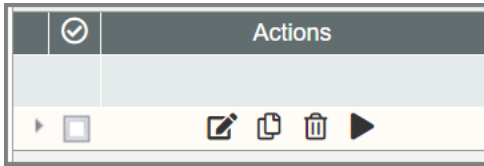
☑	Actions	Description	Format	Last Run	Next Run	Status			
		<input type="text"/>	<input type="text" value="PDF"/>	<input type="text" value="12/7/2022 3:00 PM"/>	<input type="text" value="12/7/2022 3:00 PM"/>	<input type="text" value="New"/>			

Actions (Filtering Row) – The following actions are available in the filtering row:

Choose Columns Clear Filters Refresh

- **Choose Columns** – This option enables you to add or remove columns from the Report List.
- **Clear Filters** – This option is only available if there are current filters. It clears out all filters that are specified.
- **Refresh** – This option refreshes your search results using the selected filtering criteria.

Report Information – Use the Plus and Minus buttons to expand or contract information about individual reports or groups. Information about the report, schedule, and specified parameters are available when clicking on an individual report’s row.



- **Check Box** – Use this checkbox to mark the report as Selected. You can select all checkboxes with the button to the left of the Actions column name.
- **Edit Button** – Clicking this button opens a new window with options that are the same as InVision > New Report. Changes that are saved will modify the report in the row of the edit button clicked.
- **Copy Button** – Clicking this button opens a new window with options that are the same as InVision > New Report. Changes that are saved will create a new report row in the scheduled reports list.
- **Delete Button** – This button deletes the scheduled report. If you would like to keep the scheduled report, but do not want it to run automatically, edit it so that it is not active rather than deleting it.
- **Run Button** – This button runs the scheduled report immediately in the same way that selecting Run Now in InVision > New Report would do.

Delete Selected / All buttons – Use these buttons to delete selected schedules or all schedules in the current filtered list. Use the checkbox located in the report information to select specific reports for use with the Delete Selected button.



Saved Reports

The Saved Reports tab lists the reports that have run based on the schedule in the InVision > New Report > Report Schedule section of InCommand. The list is very customizable so that you can easily find the report based on specific criteria.

Management		Maintenance		InVision		Client Maintenance		Inquiry	
Reports			Scheduled Reports			Saved Reports			
Page 1 of 1 Choose Columns Clear Filters Refresh									
Drag a column header here to group by that column									
☑	Actions	Description	Format	Expires	Status				
▶ <input type="checkbox"/>	🗑️ ⬇️	Turnaround Compliance	PDF	3/2/2023 2:48 PM	Succeeded				
▶ <input type="checkbox"/>	🗑️ ⬇️	MT Rate Inventory Report	Excel	2/28/2023 9:40 AM	Succeeded				
▶ <input type="checkbox"/>	🗑️ ⬇️	MT Rate Inventory Report	Excel	2/28/2023 8:22 AM	Succeeded				

Note: Reports saved on the server expire after 90 days. Download reports to your hard drive if they are needed for longer.

Grouping Section – Click and drag an available column to this area to group reports by that column’s criteria.

Drag a column header here to group by that column

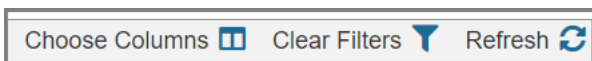
Column Names – Click on a column to sort by that column. Columns can be added or removed using the Choose Column button discussed below. The available columns are: Category, Owner, Owner ID, Scheduled, Subscription, Ran, Expires, Description, Format, Status, and Report.

Description	Format	Expires	Status
-------------	--------	---------	--------

Filtering Row – This row allows you to input specific information into the available columns to limit your results by those criteria. To enter search criteria, type the information or use the drop-down menu in the appropriate column. The results will automatically refresh when you click or tab out of the field.

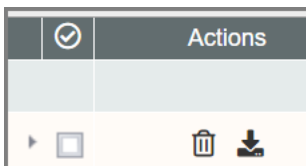
Description	Format	Expires	Status
<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="c"/>	<input type="text" value="v"/>

Actions (Filtering Row) – The following actions are available in the filtering row:



- **Choose Columns** – This option enables you to add or remove columns from the Report List.
- **Clear Filters** – This option is only available if there are current filters. It clears out all filters that are specified.
- **Refresh** – This option refreshes your search results using the selected filtering criteria.

Report Information – Use the Plus and Minus buttons to expand or contract information about individual reports or groups. Clicking the report row will prompt you to download or open the report file. The report file type is specified in the schedule.



- **Check Box** – Use this checkbox to mark the report as Selected. You can select all checkboxes with the button to the left of the Actions column name.
- **Delete Button** – This button deletes the scheduled report. If you would like to keep the scheduled report, but do not want it to run automatically, edit it so that it is not active rather than deleting it.
- **Download Button** – This button prompts you to download or open the report file. The report file type is specified in the schedule.

Delete Selected / All buttons – Use these buttons to delete selected schedules or all schedules in the current filtered list. Use the checkbox located in the report information to select specific reports for use with the Delete Selected button.



Client Maintenance

Client Maintenance > Home

This is a list of clients for which your company does transcription. It does not include clients that are outsourced to your company.

To enter the maintenance workflow for a client, either double-click on the client or select it, then click the 'Enter Client Maintenance <>' link.

[↔ Enter Client Maintenance for 01Test](#)

Client Maintenance > Workflow

This screen shows the InCommand graphical Workflow. The 'Client Setup' section takes users through the process of configuring a client on the eSOne platform. Click on a folder to open up the associated screen and fill in the necessary information. These steps are also available from the Client Maintenance > Maintenance menu.

The 'Workflow At a Glance' section shows a graphical display of the client's workflow. Folder names are customizable. The folder names in your account may vary from those below, however, the functions remain the same. Click on a

workflow folder to view its configuration options. Here you can rename the folder, set rights to the folder, and many other options.

Workflow Folders

Dictations– This folder holds dictations that have yet to be transcribed.

Review 1 and Review 2– These folders are used for any action required before authentication and are commonly referred to as “Pre–Authentication” Folders. They can be used to review incomplete transcriptions prior to a clinician seeing/completing them. This folder can also be used as a Print folder if electronic signature is not used.

Preliminary– This folder holds transcriptions that are awaiting the dictating clinician’s completion. This folder is commonly referred to as the “Authentication” folder and is typically used when a clinician is electronically signing or reviewing transcriptions.

Final 1 and Final 2– These folders are used for any action required after authentication. These folders are commonly referred to as “Post–Authentication” Folders. They can be used to print transcriptions, whether they are electronically signed or not. This folder is commonly used for printing the final transcription for placement into a paper medical record.

Referral– This folder allows sharing of transcriptions between dictators in the same organization or another organization that utilizes the eScription One platform. This folder can eliminate the need to mail referring clinicians a copy of transcriptions of which they are copied.

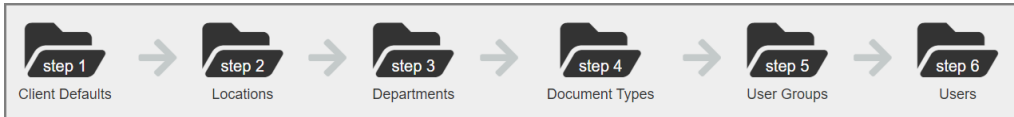
Search All– This is the eScription One repository which stores all transcriptions. By default, the Search All Folder returns transcriptions in the two [Final] Folders and the [Repository]. One option can be set to include transcriptions that haven’t been authenticated yet. That is, are in either of the [Review] or [Preliminary] Folders. There is a Sub–Tab with the [Search All] Folder to access transcriptions that have been invalidated (i.e. put in trash can).

Invalidated– This holds all transcriptions that have been invalidated.

Workflow at a Glance ***

Client Setup


Follow the steps below for a simple client setup.



Management	Maintenance	InVision	EDEMOCLNT Client Maintenance	
Home	Client Defaults	Workflow	Maintenance	Advanced Maintenance
+ Client Information				
+ Workflow Settings				
+ Non - Workflow Settings				
+ Interface Settings				
+ Demographic Field Labels				
+ Per Page Fax Settings				
+ User Password and Security Options				

Step 1: Client Defaults

Client Information

Management	Maintenance	InVision	EDEMOCLNT Client Maintenance	Inquiry
Home	Client Defaults			
<div style="display: flex; justify-content: space-between;"> Client Information Signed Up on 7/12/2010 12:00:00 AM </div>				
Client Full Name	Edemo Client *			?
Client Active	<input checked="" type="checkbox"/>			
Client Name	EDEMOCLNT *			
<i>The client contact information is for informational use only and can be used as your contact database for your clients. E-mails will not be sent directly to clients by eS-One. You can also add additional contacts in Client Maintenance > Advanced Maintenance > Contacts.</i>				
Address 1	123 Street Ave *			
Address 2				
Address 3				
City	City *			
State	ST *			
Zip Code	12345 *			
Country				
Client Web Address				
Client Logo				
Client Time Zone	(GMT-08:00) Pacific Time (US & Canada) ▼			
Client Locale	English (Australia) ▼			
Allow eS-One Notifications	<input type="checkbox"/>			
Show Comment On Copy	<input checked="" type="checkbox"/>			

Client Full Name – The full name of the client.

Client Active – This is an on/off switch for a client.

Client Name – This is a shortened client name that will be used to log in to eScription One applications. Please note there is a 26-character maximum.

Client Password – This password will be used in conjunction with the above Client Name to log into InSync***.

Export Password – This password is used when transcriptions are exported out of the eScription One system.

Client Address – This is for informational purposes.

Client Web Address – This creates a link to the client’s website from the client logo.

Client Logo – The logo the client wishes to use.

Client Time Zone – If the client has locations in multiple time zones, please select the main location time zone.

Client Locale – This setting controls the client locale.

Allow eScription One Notifications – If checked, users will be allowed to subscribe to the eScription One mailing list. This will send e-mail notices of system downtime, software updates, and the monthly eScription One newsletter. Users with this selected will have a “subscribe to notifications” option on the home page of InQuery.

Show Comment On Copy – When an MT copies a transcription, add text to the comment to indicate a copy was made.

Workflow Settings

Workflow Settings	
Dictation Folder Name	<input type="text"/>
↳ Prompt Users when Marking Dictations as Stat	Always <input type="button" value="v"/>
Search Folder Name	<input type="text"/>
↳ Proxy Based Upon Last Signature in Search All	<input type="checkbox"/>
Use the Review Folder	<input checked="" type="checkbox"/>
↳ Review Folder Name	<input type="text"/>
↳ Review Folder is Location Based	<input checked="" type="checkbox"/>
↳ Reviewed Color	<input type="color" value="black"/>
↳ Send all to "Review" Folder	<input type="checkbox"/>
↳ Tranco Can't Send to Review or Review 2 Folder	<input type="checkbox"/>
↳ Can Complete All & Complete Selected From Review	<input checked="" type="checkbox"/>
↳ Complete Label For Review	<input type="text"/>
↳ Handle [bracketed fields] in Review	Do Not Warn <input type="button" value="v"/>
↳ Proxy Based Upon Last Signature in Review	<input type="checkbox"/>

Dictation Folder Name – The folder name that is presented to InQuery users.

– **Prompt Users when Marking Dictations as Stat** – Gives the ability to suppress the confirmation message providers see in the My Dictations folder in InQuery when marking a dictation as Stat.

Search Folder Name – The folder name that is presented to InQuery users.

– **Proxy Based Upon Last Signature in Search All** - When the Search All folder is Proxy based, check this box to allow users to access transcriptions based on their proxy to the Last Signature on the transcription instead of the Dictating physician. An example where this is useful is academic institutions, where Residents rotate between various clinics often. In this case managing proxy to Residents can be cumbersome, so turning this option ON allows Proxy to the Transcription to be based upon the Last Signature (Attending physician).

Use the Review Folder – This is one of two pre-authentication folders. It is primarily used for staff to review the Transcription prior to the dictators' review and electronic signature. Turn ON to allow this folder to show up in the Clients InQuery workflow for all users. This folder can be turned off for individual InQuery users in their User Profile and some transcriptions may bypass this folder as defined in the Document Type setup.

- **Review Folder Name** – The folder name that is presented to InQuery users.
- **Review Folder Is Location Based** – If ON, this limits InQuery users to only see transcriptions in their Review Folder for the locations(s) they are assigned in their User Profile. If OFF, this remains a Proxy based folder. InQuery users will only see transcriptions for dictators they have Proxy to. Dictators have proxy to themselves. Admin staff needs to be set up with Proxy to dictators.
- **Reviewed Color** – All Transcription records that have been process through the Review Folder will have this text color when viewed in the Preliminary Folder - Record View.

Note: This does not apply to Transcriptions processed through the Review 2 Folder.
- **Send all to “Review” Folder** – Turn ON to force transcriptions to the Review folder when the folder is enabled and the document type, user, location, and comment tags have access rights.
- **Tranco Can’t Send to Review or Review 2 Folder** – Do not allow the transcription company (MT using InScribe) to send Transcriptions to the Review or Review 2 Folders. Clients who don't have dictators review their dictations (and the Preliminary Folder turned off), typically use this to force the Transcriptions directly to the Final folders for printing and/or faxing.
- **Can Complete All & Complete Selected From Review** – With this checked the client will be able to use the complete all and complete selected options from the Review folder.
- **Complete Label For Review** – ‘Complete’ and ‘Complete & Next’ button label presented to InQuery users in Review Folder.
- **Handle [bracketed fields] in Review** – Prompt when completing a document from Review folder if it contains [bracketed fields].
- **Proxy Based Upon Last Signature in review** – When the review folder is proxy based, check this box to allow users to access transcriptions based on their proxy to the Last Signature on the transcription instead of the Dictating physician. An example where this is useful is academic institutions, where Residents rotate between various clinics often. In this case managing proxy to Residents can be cumbersome, so turning this option ON allows Proxy to the Transcription to be based upon the Last Signature (Attending physician).

Use the Review 2 Folder	<input type="checkbox"/>
↳ Addl Review Folder Name	<input type="text"/>
↳ Review 2 Folder is Location Based	<input type="checkbox"/>
↳ Send all to "Review 2" Folder	<input type="checkbox"/>
↳ Tranco Can't Send to Review or Review 2 Folder	<input type="checkbox"/>
↳ Can Complete All & Complete Selected From Review 2	<input checked="" type="checkbox"/>
↳ Complete Label For Review 2	<input type="text"/>
↳ Handle [bracketed fields] in Review 2	Do Not Warn ▾
↳ Proxy Based Upon Last Signature in Review 2	<input type="checkbox"/>

Use The Review 2 Folder – This is the second of the pre-authentication folders. Turn ON to have this show up in InQuery workflow. This folder can be turned off for individual InQuery users in their User Profile. Some transcriptions may bypass this folder as defined in the Document Type setup.

- **Addl Review Folder Name** – The folder name that is presented to InQuery users.
- **Review 2 Folder Is Location Based** – If ON, this limits InQuery users to only see transcriptions in their Review 2 Folder for the location(s) they are assigned in their User Profile. If OFF, this is a Proxy based folder and InQuery users will only see transcriptions for dictators they have Proxy to. Dictators have proxy to themselves. Admin staff will need to be set up with Proxy to dictators.
- **Send all to “Review 2” Folder** – Turn ON to force transcriptions to the Review 2 folder when the folder is enabled and the document type, user, location, and comment tags have access rights.
- **Tranco Can’t Send to Review or Review 2 Folder** – Do not allow the transcription company (MT using InScribe) to send Transcriptions to the Review or Review 2 Folders. Clients who don't have dictators review their dictations (and the Preliminary Folder turned off), typically use this to force the Transcriptions directly to the Final folders for printing and/or faxing.
- **Can Complete All & Complete Selected From Review 2 folder** – Client can use Complete All and Complete Selected features in Review 2 Folder.
- **Complete Label For Review 2 Folder** – ‘Complete’ and ‘Complete & Next’ button label presented to InQuery users in Review 2 Folder.
- **Handle [bracketed fields] in Review 2** – Prompt when completing a document from Review 2 folder if it contains [bracketed fields].
- **Proxy Based Upon Last Signature in Review 2** – When the Review 2 folder is Proxy based, check this box to allow users to access transcriptions based on their proxy to the Last Signature on the transcription instead of the Dictating physician. An example where this is useful is academic institutions, where Residents rotate between various clinics often. In this case managing proxy to Residents can be cumbersome, so turning this option ON allows Proxy to the Transcription to be based upon the Last Signature (Attending physician).

Use the Preliminary Folder	<input checked="" type="checkbox"/>
↳ Preliminary Folder Name	<input type="text" value="Preliminary"/>
↳ Can View Pre-Authenticated Transcriptions.	<input checked="" type="checkbox"/>
↳ Mark Transcription as Corrected after leaving Preliminary	<input type="checkbox"/>
↳ Clear Signatures on Return from Preliminary to Marked For Review Folder	<input checked="" type="checkbox"/>
↳ Can Complete All & Complete Selected From Preliminary	<input checked="" type="checkbox"/>
↳ Complete Label For Preliminary For Users WITH Electronic Signature	<input type="text"/>
↳ Complete Label For Preliminary For Users WITHOUT Electronic Signature	<input type="text"/>
↳ Handle [bracketed fields] in Preliminary	<input type="text" value="Warn"/>
↳ Dual Resident/Attending Workflow	<input type="checkbox"/>
↳ Dual Resident/Attending Color	<input type="color" value="blue"/>

Use The Preliminary Folder – This is the authentication folder for dictators and other clinicians. Turn ON if dictating clinicians will review their transcription. Completing from this folder is where Electronic Signature would occur if turned on in their User Profile.

Note: There are other setup options that will determine which other clinicians or admin staff may use or look into this folder.

- **Preliminary Folder Name** – The folder name that is presented to InQuery users.
- **Can View Pre-Authenticated Transcriptions**– Allows Search All Folder to find and display Transcriptions that haven't been Authenticated. That is, the Transcription is still in the Review, Review 2, or Preliminary Folder. A "Preliminary" watermark is displayed if the InQuery user doesn't normally have access to these folders. If this setting is OFF, Search All will not find pre-authenticated Transcriptions.
- **Mark Transcription as corrected after leaving Preliminary** – For clients that export Transcriptions to their EMR prior to being authenticated, turn this ON to mark a Transcription as corrected once it is authenticated. "Corrected" is a specific field in the data file that is uploaded to the client's EMR and needs to be established during the upload creation process.
- **Clear Signatures On Return From Preliminary to Review folder** – Turning this option ON will remove the signatures on a Transcription when it is returned to the Review Folder from the Preliminary Folder. (The user can do this from the Information screen while reviewing a Transcription.) This only applies when more than one signature is required such as in institutions with Resident and Attending physicians. Please note, the Transcription gets moved to Review Folder. It doesn't show up in the Review 2 Folder. The Transcription cannot be sent back to the Preliminary Folder of the previous signor.

- **Can Complete All & Complete Selected From Preliminary Folder** – Client can use Complete All and Complete Selected features in Preliminary Folder.
- **Complete Label For Preliminary For Users WITH Electronic Signature** – ‘Complete’ and ‘Complete & Next’ button label presented to InQuery users with electronic signature in Preliminary Folder..
- **Complete Label For Users WITHOUT Electronic Signature** – ‘Complete’ and ‘Complete & Next button’ label presented to InQuery users without electronic signature in Preliminary Folder.
- **Handle [bracketed fields] in Preliminary** – Prompt when completing a document from Preliminary Folder if it contains [bracketed fields].
- **Dual Resident/Attending Workflow** – This modifies the normal workflow between the Resident (whose setup includes Requires Additional Signature) and Attending where the transcription must be authenticated by the Resident first before going to the Attending’s Preliminary Folder. When enabled, a transcription is in both the Resident’s and Attending’s Preliminary Folder at the same time. If the Resident signs first, it is now only available to the Attending. If the Attending signs, it is moved on in the workflow. The Resident no longer can see it in the Preliminary Folder.
- **Dual Resident/Attending Color**– This is the background color of the transcription when it is unsigned by both the Resident and Attending. When the Resident signs, the background color changes to normal.

Use the Referral Folder	<input type="checkbox"/>
↳ Referral Folder Name	<input type="text"/>
↳ Can View Transcriptions that are in the Final Folder	<input checked="" type="checkbox"/>
↳ Complete Label For Referral	<input type="text"/>
Use the Final Folder	<input checked="" type="checkbox"/>
↳ Final Folder Name	<input type="text"/>
↳ Final Folder is Location Based	<input checked="" type="checkbox"/>
↳ Send to Final based on Associates	<input checked="" type="checkbox"/> Autofax Associates <input checked="" type="checkbox"/> Mail Associates <input checked="" type="checkbox"/> InQuery Associates <input checked="" type="checkbox"/> No Associates
↳ Non-AutoFax Associate Color	<input type="color" value="#000080"/>
↳ Can Complete All & Complete Selected From Final	<input checked="" type="checkbox"/>
↳ Complete Label For Final	<input type="text"/>
↳ Handle [bracketed fields] in Final	Do Not Warn <input type="button" value="v"/>
↳ Proxy Based Upon Last Signature in Final	<input type="checkbox"/>

Use The Referral Folder – Referral Folder - this folder receives copies of reports from other dictators, either within the Client organization or from the outside (with appropriate setup). This option is usually used for Multi-Specialty Clinics or Hospitals.

- **Referral Folder Name** – The folder name that is presented to InQuery users.
- **Can View Transcriptions that are In the Final Folder** – Allow the Referral folder to find and display Transcriptions that haven't been completed out of the Final folders in the Workflow.
- **Complete Label For Referral** – 'Complete' and 'Complete & Next' button label presented to InQuery users with electronic signature in Referral Folder.

Use The Final Folder – Turn ON folder access for Client. The Final Folder is a post-authentication folder and is used for additional processing of the Transcription such as printing for the medical record or to send to outside physicians (Associates). Control of when Transcriptions go to this folder is controlled by "Send to Final based on Associates" option. These Folders can be turned OFF in User Roles or in Individual User settings.

- **Final Folder Name** – The folder name that is presented to InQuery users.
- **Final Folder Is Location Based** – If ON, a user with access to the Final Folder will only see transcriptions for the location(s) they are assigned (in the Group Role or the User Profile). If OFF, the Final Folder will be based upon Proxy and users will only see Transcriptions of clinicians they have Proxy to.
- **Send to Final Based on Associates** – Send records to Final when the associate on the Transcription match the checked criteria.
- **Non–AutoFax Associate Color** – This color would indicate transcription in the Final and Final 2 folders that has an associate attached which is not set to AutoFax.
- **Can Complete All & Complete Selected From the Final Folder** – Client can use Complete All and Complete Selected features in Final Folder.
- **Complete Label For Final** – 'Complete' and 'Complete & Next' button label presented to InQuery users in Final Folder.
- **Handle [bracketed fields] in Final** - Prompt when completing a document from Final Folder if it contains [bracketed fields].
- **Proxy Based Upon Last Signature in Final** – When the Final folder is Proxy based, check this box to allow users to access transcriptions based on their proxy to the Last Signature on the transcription instead of the Dictating physician. An example where this is useful is academic institutions, where Residents rotate between various clinics. In this case managing proxy to Residents can be cumbersome, so turning this option ON allows Proxy to the Transcription to be based upon the Last Signature (Attending physician).

Use the Final 2 Folder	<input type="checkbox"/>
↳ Addl Final Folder Name	<input type="text"/>
↳ Final 2 Folder is Location Based	<input type="checkbox"/>
↳ Send to Final 2 based on Associates	<input checked="" type="checkbox"/> Autofax Associates <input checked="" type="checkbox"/> Mail Associates <input checked="" type="checkbox"/> InQuery Associates <input checked="" type="checkbox"/> No Associates
↳ Can Complete All & Complete Selected From Final 2	<input checked="" type="checkbox"/>
↳ Complete Label For Final 2	<input type="text"/>
↳ Handle [bracketed fields] in Final 2	Do Not Warn ▾
↳ Proxy Based Upon Last Signature in Final 2	<input type="checkbox"/>
Use Security In Workflow	<input type="checkbox"/>
Show Additional Search Criteria	<input type="checkbox"/>

Use the Final 2 Folder – Turn ON folder access for all of Client's InQuery users. The Final 2 Folder is a post-authentication folder.

- **Addl Final Folder Name** – The folder name that is presented to InQuery users.
- **Final 2 Folder Is Location Based** – If ON, a user with access to the Final 2 Folder will only see transcriptions for the location(s) they are assigned (in the Group Role or the User Profile). If OFF, the Final 2 Folder will be based upon Proxy and users will only see Transcriptions of clinicians they have Proxy to.
- **Send to Final 2 Based on Associates** – Send records to Final 2 Folder when the Associates on the Transcription match this criteria.
- **Can Complete All & Complete Selected From the Final2 Folder** – Client can use Complete All and Complete Selected features in Final 2 Folder.
- **Complete Label For Final 2** – 'Complete' and 'Complete & Next' button label presented to InQuery users in Final 2 Folder.
- **Handle [bracketed fields] in Final 2** – Prompt when completing a document from Final 2 Folder if it contains [bracketed fields].
- **Proxy Based Upon Last Signature in Final 2** – When the Final 2 folder is Proxy based, check this box to allow users to access transcriptions based on their proxy to the Last Signature on the transcription instead of the Dictating physician. An example where this is useful is academic institutions, where Residents rotate between various clinics often. In this case managing proxy to Residents can be cumbersome, so turning this option ON allows Proxy to the Transcription to be based upon the Last Signature (Attending physician).

Use Security In Workflow – Security is a feature to allow or deny access to Transcriptions of certain document types in the Repository. (This is defined in Maintenance > Document Security.) If turned ON here, then Security is extended to Workflow Folders. A typical example is to limit access to "Psych" Transcriptions to only staff in the Psychiatry Department but allow access to "Everything but Psych" to all users.

Show Additional Search Criteria – This option enables the following additional search criteria in the workflow folders: Account Number, Orders, and Admission Date.

Non-Workflow Settings

***1/9 check these definitions

- Non - Workflow Settings	
Preferred Transcription Format	Based on Document Type and User ▾
Turnaround Time	0 hours
Turnaround Time STAT	0 hours
Default Location	Default Location ▾
Patient Name Format	First Last ▾
Associate Name Format	First M. Last, Suffix ▾
Default Dictating User Pool	<input checked="" type="checkbox"/> Clear All <input checked="" type="checkbox"/> Default User Pool
Pool Categories	<input type="checkbox"/>
Default Document Type Pool	<input checked="" type="checkbox"/> Clear All <input checked="" type="checkbox"/> Default Document Pool

Preferred Transcription Format - This determines how transcriptions for the document type will be formatted for the MT.

- **Based on Document Type and User:** means the document type and user will determine the transcription format. This option allows more control of formatting to the document type and user level.
- **Unstructured:** sets the whole client to use the ShadowScribe editor in the traditional format. This is where the transcription is typed or edited normally without MTs typing or editing text within content boxes.
- **Structured:** sets the whole client to use the ShadowScribe editor in structured mode. Transcriptions will be formatted with content boxes. Content boxes are usually attached to a specific title like History of Present Illness. MTs would type or edit text of that section into the content box.

Turnaround Time – This is the global setting for turnaround time this can be adjusted for each document type.

Default Location – This is used when a client has multiple locations. When a dictation comes to the eScription One system without a location the default will be used.

Patient Name Format – This selects how the patient names are stored in the database.

Associate Name Format – This selects how the associates name will appear on transcriptions, envelopes, and cover letters.

Inquiry Time-Out – This setting is the amount of time with no activity that can pass without the user being automatically logged out. This can be overridden in the user setup.

Default Dictating User Pool – All dictating users need to be assigned to a dictating user pool. When a user is not assigned to a user pool the default pool will be used.

Pool Categories – By default the eScription One system limits user pools to 31 per client. If more than 31 pools are required pool categories can be used to add more pools.

Default Document Type Pool – All document types should be assigned to a document type pool. If left unassigned the default document type pool will be used.

Use InTouch Dictation	<input checked="" type="checkbox"/>
↳ InTouch Phone Number	<input type="text" value="608-824-3740"/>
↳ InTouch Dictation System Emulation	<input type="text" value="InTouch Default"/> <input type="button" value="Q preview"/>
↳ Append Location Code To Patient ID	<input type="checkbox"/>
↳ InTouch DID	<input type="text" value="None"/>
↳ Suspended Dictation Time Limit	<input type="text" value="24"/>
↳ Greeting	<div style="border: 1px solid black; height: 80px;"></div>
Show Characters Count	<input type="checkbox"/>
Line Label	<input type="text" value="Lines"/>
InVision Reports by Proxy	<input type="checkbox"/>
Reverse Signature Order	<input type="checkbox"/>
Proxy Based Upon Last Signature	<input type="checkbox"/>
Show Windows Print Dialog on Print All	<input checked="" type="checkbox"/>
Use Associate Types	<input type="checkbox"/>
Enable Qualified Text In My Templates	<input checked="" type="checkbox"/>
Logging Levels	<input checked="" type="checkbox"/> Log Document View / Print
Envelope Template Style	<input type="text" value="Emdat Default"/>
Default Print Template Paper Size	<input type="text" value="Letter"/>
Audio Playback Method	<input type="text" value="Play Dictations in Browser (secure)"/>
Display Dictation Playback Controls in Editor	<input type="checkbox"/>
Enable Saving Dictations in InSync	<input checked="" type="checkbox"/>
Show Printing Update Available Notifications	<input checked="" type="checkbox"/>

Use InTouch Dictation – InTouch is the eScription One telephone dictation system. Having this checked will allow use of that system.

InTouch Phone Number – This field is used to display the phone number, or extension that users at the client should dial.

InTouch Dictation System Emulation – You are able to choose from a variety of different layouts tying a number or button on the telephone to a specific function. Custom emulations are also available if the desired emulation is not available.

InTouch DID – This is the actual InTouch DID number to be dialed by dictators to connect to InTouch. This should only be the 7 digit number. This number is used by InTouch along with the Dictation ID to identify the dictator.

Show Character Count – If checked this causes only the character count, not the line count to be displayed in the billing report.

Billing Unit Label – You can assign a custom label for the unit of measure for billing. The default is “lines”.

InVision Reports By Proxy – If checked all users will only have access to reports for clinicians they have proxy to.

Signatures Descending – By default eScription One lists the dictator’s signature first in a transcription. Additional signatures appear in the order which they were added to the transcription. Turning this on will reverse the above order.

Proxy Based Upon Last Signature – With this setting turned on proxy to transcriptions will be based on the last signature. Typically this would be the attending physician.

Show Windows Print Dialog On Print All – When checked this allows the Windows print dialog box to pop up when printing. This is useful if a user would like to print to a different printer, or print multiple copies.

Use Associate Types – This option allows associates to be categorized, such as by referring or consulting.

Enable Qualified Text In My Templates – This turns on the QT button and allows the dictator to create, edit, and see Qualified Text in their InQuery My Templates tab. The My Templates tab is turned on for each dictator in their User Setup. Billing for Qualified Text is turned on in Client Relationships.

Logging Levels – By default, basic logging is performed on a client. Please select additional logging levels you would like performed for this client.

Envelope Template Style – This setting controls the template used when printing envelopes from InQuery. You can work with our print template department to create new styles if necessary.

Interface Settings

Interface Settings	
Patient Interface Upload	<input checked="" type="checkbox"/>
Map Emdat Locations to Client's Scheduling Locations	<input type="checkbox"/>
Set Patients Proper Case	<input type="checkbox"/>
Use Associates	<input type="checkbox"/>
Set Associates Proper Case	<input type="checkbox"/>
Ignore Blank Fields	<input type="checkbox"/>

Patient Interface Upload – Check this option if the client will upload patient information to the eScription One system.

Map eScripton One Locations To Client's Scheduling Locations – Turn this option on if the client is sending a location code with patient information upload.

Set Patients Proper Case – Turn this option on if the patient upload is in all upper case, this will put the names in the proper case format.

Use Associates – Check this option to allow transcriptionists to search for associates database in InScribe.

Set Associates Proper Case – Turn this option on if the associate upload is in all upper case, this will put the names in the proper case format.

Ignore Blank Fields – When checked this will ignore blank fields when information is uploaded.

Demographic Field Labels

Demographic Field Labels	
Patient ID Label	MRN
Patient Name Label	Name
Gender Label	Gender
Birth Date Label	DOB
Appointment Date Label	Appt Date
Clinician Label	Physican
Order Number Label	Exam #
User Field 1 Label	Insurance Co
User Field 2 Label	Group ID
User Field 3 Label	Acct ID
User Field 4 Label	Employer
User Field 5 Label	Contact #
Patient Letter Label	P

Demographic fields are used to store demographic data outside of the transcription text. This information can then be used by the print template or interface to insert this data in specific places in the transcription. Use this section to rename these fields to fit the preference and terminology of the Client.

Some user fields are suited to specific information that all Transcriptions might have in common such as Patient ID, Patient Name, etc. User Fields 1 – 5 are meant to be fully customized for any information not covered in the other user fields.

Fax Settings

Fax Settings	
AutoFax Enabled	<input checked="" type="checkbox"/>
AutoFax After Event	Final 1 <input type="button" value="v"/>
Do Not Generate AutoFax Envelopes or Cover Letters	<input checked="" type="checkbox"/>
Send Fax Cover Page	<input checked="" type="checkbox"/>
Facility Description	Facility Description (50 Char)
Call-Back Number	Call-Back Number (50 Char)
Cover Page Notes	Cover Page Notes (1,000 Char)
Facsimile Tab Restrictions	Restrict By Location <input type="button" value="v"/>
Allow MTSO Manage Faxes	<input checked="" type="checkbox"/>

Auto Fax Enabled – Allows the use of eScription One AutoFax.

AutoFax After Event – Selects the trigger point for documents to be faxed.

Do Not Generate AutoFax Envelopes Or Cover Letters – When checked this option will prevent cover letters and envelopes for AutoFax associates from being generated.

Send Fax Cover Page – ON = suppresses creation of Cover Letter and Envelope for Associates who will be AutoFaxed. This option does not apply to Fax-on-Demand.

Facility Description – Use this field to create a customized Fax Coverpage header

Call-Back Number – Use this field to create a customized Fax Coverpage header

Cover Page Notes – Use this field to create a customized Fax Coverpage header

Facsimile Tab Restrictions – Restrict faxes search results by Proxy or Location on InQuery Services Tab Fax Management screen.

Allow MTSO Manage Faxes –Turn ON to allow MTSO to manage faxes for this client.

User Password Options

User Password Options	
Expiration Days	<input type="text" value="0"/>
Minimum Length	<input type="text" value="0"/>
History Count	<input type="text" value="0"/>
Pattern Length	All characters allowed <input type="button" value="v"/>
Case Sensitive	<input type="checkbox"/>
Require Upper Case Characters	<input type="checkbox"/>
Require Lower Case Characters	<input type="checkbox"/>
Require Numerical Characters	<input type="checkbox"/>
Require Special Characters	<input type="checkbox"/>
Username Pattern Length	All characters allowed <input type="button" value="v"/>
Lock Account After Failed Login Attempts	<input type="text" value="0"/>
Automatically Unlock Account	<input type="text" value="0"/>
Temporary Password (password will need to be changed when you re-login)	<input type="text" value="password"/>
Mobile Apps Can Save Password	<input checked="" type="checkbox"/>

Expiration Days – This is the number of days a password will remain valid.

Minimum Length – The minimum number of characters required for a valid password. 1 is the minimum length.

History Count – Number of password changes required before a password can be reused. 0 means passwords can be reused immediately.

Pattern Length – Number of repeating characters that cause a password to be invalid.

Case Sensitive – When checked, this option checks that the case of characters entered match the case of the saved password.

Require Upper Case Characters – When checked, this option requires that passwords contain at least one upper case character. If case sensitivity is not turned on this requirement is satisfied by any letter.

Require Lower Case Characters – When checked, this option requires that passwords contain at least one lower case character. If case sensitivity is not turned on this requirement is satisfied by any letter.

Require Numerical Characters – When checked, this option requires that passwords contain at least one numerical character.

Require Special Characters – When checked, this option requires that passwords contain at least one non-alphanumeric character.

Username Pattern Length – Number of characters that exist in both the password and username in the same order that cause a password to be invalid.

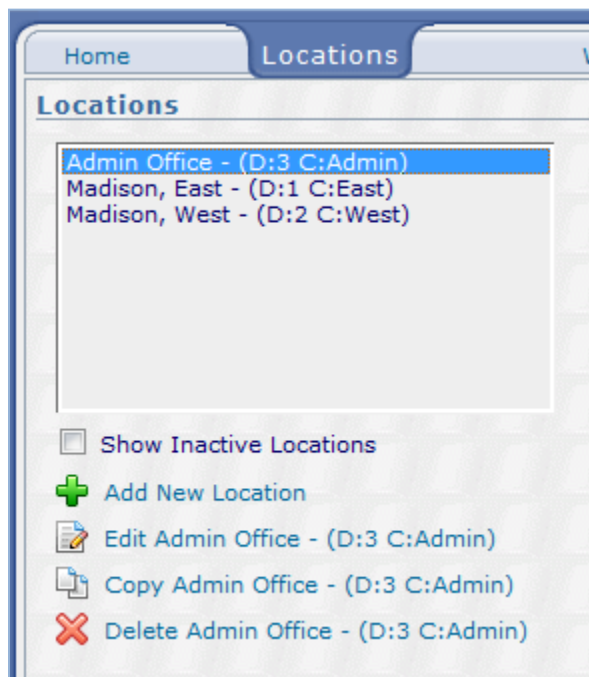
Lock Account After Failed Login Attempts – The number of failed login attempts that will cause the users account to be locked. 0 means accounts will never be locked by failed attempts.

Automatically Unlock Account – The number of minutes a user's account should remain locked before being automatically unlocked. 0 means accounts will never be automatically unlocked.


Temporary Password – This password will be used by default when creating a new user. If a users password matches this password they will be prompted to change it before being allowed to login.

Mobile Apps Can Save Password – Allow users of mobile applications, such as the iPhone and Android applications, to save their password on their device. If this is not checked, users will be required to enter their passwords every time they use the applications.

Locations



Add or Edit New Location

 Add New Location
 Edit Madison, East - (D:1 C:East)

Identifying Information

Edit Madison, East Location	
- Identifying Information ?	
Location ID	6254
Location Name	<input type="text" value="Madison, East"/>
Location Active	<input checked="" type="checkbox"/>

Location ID – This is a system generated number to track this location.

Location Name – This is the name that users will see in InQuiry or InScribe.

Location Active – When unchecked this location is turned off.

Print Template Information

- Print Template Information ?			
Description	<input type="text" value="Madison Clinic East Side"/>		
Address1	<input type="text" value="2121 East Springs Dr"/>		
Address2	<input type="text"/>		
Address3	<input type="text"/>		
City, State, Zip	<input type="text" value="Madison"/>	<input type="text" value="WI"/>	<input type="text" value="53724"/>
Phone	<input type="text" value="6085554567"/>		
Fax	<input type="text"/>		

Print Templates can use address information to construct a customized letterhead. This address information comes from one of four places within the eScription One system. The hierarchy of which address to use (and where the address is defined at) is:

- Use address field from User Setup (defined in User Setup).
- If it doesn't exist, then Use address field from Department/Location (defined in Templates > Print Templates).
- If it doesn't exist, then Use address field from Department (defined in Department).

- If it doesn't exist, then Use address field from Location (defined here).
- If it doesn't exist, don't print anything, including don't print a blank space or line.
- This way, the Print Template can generate letterhead that is customized by location, by department, by the department at that location, and by the individual clinician. When requesting a new or modified print template submit a ticket at esone.support@DeliverHealth.com, please specify what levels of the hierarchy you will be storing the information needed to construct the Transcription Letterhead.emdt

Folder Options

Folder Options	
Use Proxy Based Folder	<input checked="" type="checkbox"/>
Use Location Based Folder	<input checked="" type="checkbox"/>
Use Print for Mail Folder	<input checked="" type="checkbox"/>
Use Internal Only Folder	<input checked="" type="checkbox"/>
Send all to the Proxy Based and/or Location Based Folders	<input type="checkbox"/>
Enable AutoFax	<input checked="" type="checkbox"/>
Send Fax Cover Page	<input checked="" type="checkbox"/>

Turning ON any of the following Folders will allow Transcriptions to be routed to these Folders for Location. This is also determined by:



- The Folder is also turned ON in Client Defaults > Workflow Settings.
- The document type is defined to use these folders (defined in Document Types > Workflow Options).
- The Transcription is allowed to go through a folder. The options for this are defined in Client Defaults > Workflow Settings:
 - Tranco Can't Send to Review 1 or Review 2 Folder.
 - Send all to Review 1 and/or Review 2 Folder.
 - Send to Final 1 based on Associates & Send to Final 2 based on Associates.

Send All To Review 1 And/Or Review 2 Folders – With this option checked all transcriptions for this location will be forced to a review folder.

Enable AutoFax – AutoFax can be turned on or off for the location here.

Send Fax Cover Page – Turn OFF to not send a cover page with a fax for this location.

Import/Export Information



Import/Export Information	
Dictation Location ID	<input type="text" value="1"/>
Client Location Code	<input type="text" value="East"/>
Client Location-Code Mapping	<input type="text"/> add   remove <input type="text"/>

The following information is needed to properly use the Patient Information Upload when it contains location-specific information on the patient's appointment. (This is not required for single location Clients)

Dictation Location ID – The InTouch Telephone Dictation System can be configured to ask Dictators to enter a Location number for their dictation. Define a location number here for Location.

Client Location Code – This code is used on exports to indicate the location of a transcription to the client's system. It may also be used for some clients' interfaces to map inbound ADT and dictation.

Import/Export Information

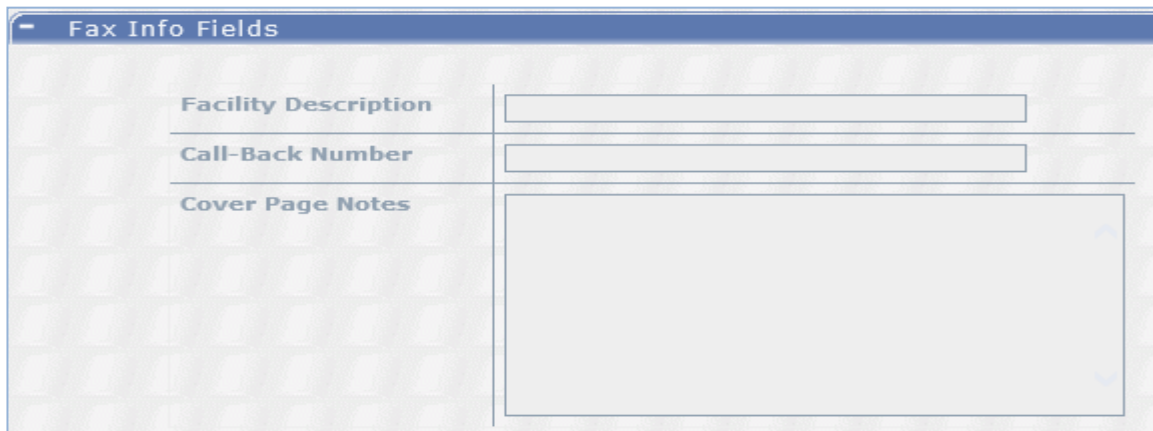
Import/Export Information	
Dictation Location ID	<input type="text" value="1"/>
Client Location Code	<input type="text" value="East"/>
Client Location-Code Mapping	<input type="text"/> add   remove <input type="text"/>

The following information is needed to properly use the Patient Information Upload when it contains location-specific information on the patient's appointment. (This is not required for single location Clients)

Dictation Location ID – The InTouch Telephone Dictation System can be configured to ask Dictators to enter a Location number for their dictation. Define a location number here for Location.

Client Location Code – This code is used on exports to indicate the location of a transcription to the client's system. It may also be used for some clients' interfaces to map inbound ADT and dictation.

Fax Info Fields



Facility Description	<input type="text"/>
Call-Back Number	<input type="text"/>
Cover Page Notes	<input type="text"/>


Text in these settings will take precedence to those in Client Defaults.

Facility Description – Use this field to create a customized Fax Coverpage header

Call-Back Number – Use this field to create a customized Fax Coverpage header

Cover Page Notes – Use this field to create a customized Fax Coverpage header

Copy Location

 Copy Madison, East - (D:1 C:East)

This will copy an existing location with a new name that you choose. You can then make any changes by editing the newly created location.

Departments

Add or Edit department



Identifying Information

Identifying Information	
Department ID	783
Department Name	Physician Assistants
Price Modifier	\$0
Department Active	<input checked="" type="checkbox"/>

Department ID – The system generated number used to identify the department in the eScription One system.

Department Name – This is the name that users will see in InQuery or InScribe.

Price Modifier – If you are charging different prices for each department, the modifier is added here. If your base transcription price is 12 cents, then by adding ".01" (without quotes) here, the price for this department will be 13 cents. You may also use negative numbers to reduce the price of a department. The price modifier will be added to the price used (Base or Stat) when creating the client billing report.

Department Active – With this unchecked the department is turned off.

Print Template Information

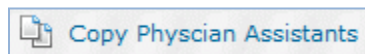
Print Template Information			
Description	Physician Assistants		
Address1	291 West Field Dr		
Address2			
Address3			
City, State, Zip	Madison	Wi	53719
Phone	6085552456		
Fax	6085554587		

Print Templates can use address information to construct customized letterhead. This Address information comes from one of four places within the eScription One system. The hierarchy of which address to use (and where the address is defined) is:

- Use address field from User Setup (defined in User Setup).
- If it doesn't exist, then Use address field from Department/Location (defined in Templates > Print Template Addresses).
- If it doesn't exist, then Use address field from Department (defined here).
- If it doesn't exist, then Use address field from Location (defined in Maintenance > Locations).
- If it doesn't exist, don't print anything, including don't print a blank space or line.

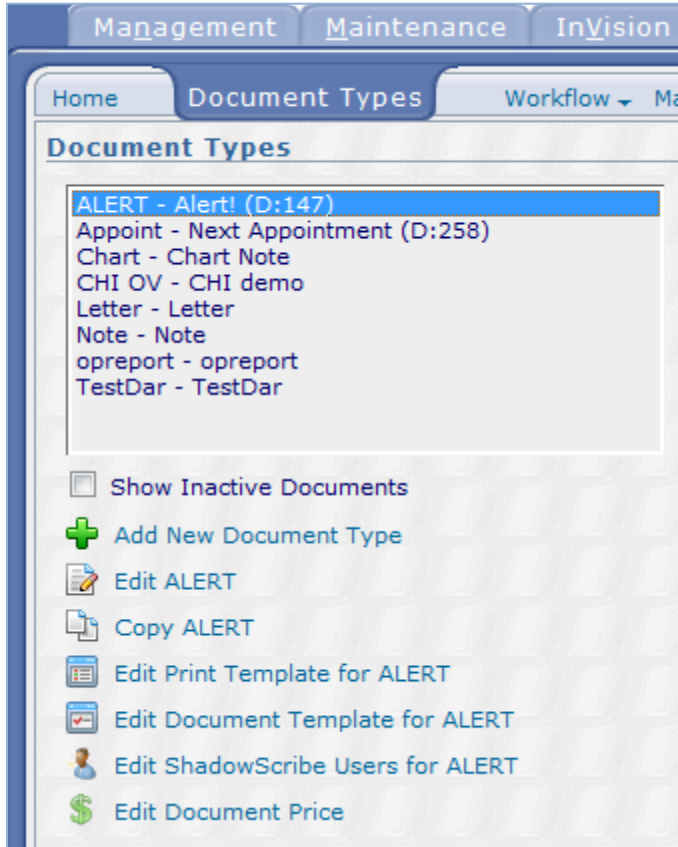
This way, the Print Template can generate letterhead that is customized by location, department, the department at that location, and by the individual clinician. When requesting a new or modified print template submit a ticket at esone.support@DeliverHealth.com, please specify what levels of the hierarchy you will be storing the information needed to construct the Transcription Letterhead.

Copy Department

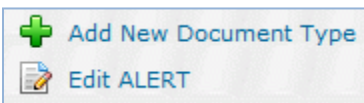


This will make a copy of an existing department.

Document Types



Add or Edit A document Type



Document Type Information

Document Type Information	
Document ID	33697
Document Type	Consult
Document Description	Consult
Turnaround Time	0
Document Type Active	<input checked="" type="checkbox"/>
Preferred Transcription Format	Structured
Nuance Document Type	Consultation

Document ID – The system generated number to identify this document in the eScription One system.

Document Type – This name is used as a short name of the document type. There is an 8 character maximum for this field.

Document Description – This is the full name for this document type.

Turn Around Time – The number of hours for acceptable turnaround time for this document type.

Document Type Active – With this unchecked the document type will be turned off.

Preferred Transcription Format – This determines how transcriptions for the document type will be formatted for the MT. **Structured:** means transcriptions will be formatted using the structured editor mode where the InScribe ShadowScribe editor will appear with content boxes. Content boxes are usually attached to a specific Title like History of Present Illness. MTs would type or edit text of that section into the content box. **Unstructured:** is the traditional format where the transcription is typed normally into the ShadowScribe without MTs typing or editing text within content boxes.

DeliverHealth Document Type – This enables/disables a document type for ShadowScribe. eScription One Document types are mapped to DeliverHealth document types as part of the speech model creation process. To enable a document type for ASR speech recognition, select a DeliverHealth Document type. If you do not want a document type to be on ASR voice recognition, then do not select a mapping.

Nuance Document Type	<input type="text"/>
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Workflow Options

Workflow Options	
Document Group	Not Assigned ▾
Append Type	<input type="checkbox"/>
Use the Proxy Based Folder	<input checked="" type="checkbox"/>
Use the Location Based Folder	<input type="checkbox"/>
Use the Signature Required Folder	<input checked="" type="checkbox"/>
Use the Print for Mail Folder	<input type="checkbox"/>
Use the Internal Only Folder	<input checked="" type="checkbox"/>
Send all to the Proxy Based and/or Location Based Folders	<input type="checkbox"/>
Generate Patient Envelope	<input type="checkbox"/>
Require Additional Signature	<input checked="" type="checkbox"/>
Require Attestation Statement for Additional Signatures	<input checked="" type="checkbox"/>
Enable Cover Letter	<input checked="" type="checkbox"/>
Enable Envelope	<input checked="" type="checkbox"/>
Enable AutoFax	<input checked="" type="checkbox"/>
Send Fax Cover Page	<input checked="" type="checkbox"/>

Document Group – This allows Transcriptions to be grouped in InQuery for summary purposes as well as color coding in InQuery to easily find Transcriptions of the same Set.

Append Type – If checked, this document Type is only for Appending to an existing Transcription. The physician must specify the existing Transcription ID at the beginning of his dictation. The MT must enter the Transcription ID into InScribe to be able to append to the previous Transcription.

Use the Review1 Folder, Review 2 Folder, Preliminary Folder, Final 1 Folder, Final 2 Folder – Check any of these to use the applicable folder.

Send All to the Review 1 Folder and/or Review 2 Folders – Turn ON, to force all Transcriptions to the Proxy Based and/or Location Based Folders for this Document Type.

Generate Patient Envelope – When checked an envelope addressed to the patient will be generated for this document type.

Require additional Signature – When checked this document type will require an additional authenticator for users who also have this option checked in their user setup.

Require Attestation Statement for Additional Signatures – If a clinician is set as an additional signature and that clinician has an attestation statement set, the attestation will be used when the clinician is asked to sign. Note that this must be on in conjunction with the (document type / user) setting of the same name.

Enable Cover Letter – When checked a cover letter will be generated for this document type.

Enable Envelope – When checked an envelope will be generated for this document type.

Enable Autofax – When checked Autofax will be available for this document type.

Send Fax Cover Page – Turn OFF to not send a cover page with a fax for this document type.

Watermark Options

Watermark Options	
Proxy Based Watermark	Preliminary ▼
Proxy Based From Print All Cover Letters Watermark	Preliminary ▼
Proxy Based From Search All Watermark	Preliminary ▼
Location Based Watermark	Preliminary ▼
Location Based From Print All Cover Letters Watermark	Preliminary ▼
Location Based From Search All Watermark	Preliminary ▼
Signature Required Watermark	Preliminary ▼
Signature Required From Print All Cover Letters Watermark	Preliminary ▼

For all of these fields the watermark selected from the dropdown menu to the right will be the watermark that appears at the point in the workflow indicated to the left.

Pricing and Priority

Pricing and Priority	
Base/Stat Price Modifier	\$0.005
Qualified Text Rate Modifier	\$-0.06
Additional Characters	70
Billing Unit Divisor	35
Stat	<input type="checkbox"/>
Document Priority	4 ▼

Base/Stat Modifier – This option allows you to increase or decrease the rate for base and stat jobs on a document type level. For example, if the base price is 16 cents per unit, entering "-0.005" (without quotes) will result in \$0.155 per unit being charge for this Document Type on the Client Billing Report.

Qualified Text Rate Modifier – This option allows you to increase or decrease the qualified text rate for a specific document type.

Additional Characters – Select the number of characters to be added to each Transcription of this Document Type for billing. This allows you to properly bill as the computer generated words (e.g. "Progress Note") and the demographic labels (e.g. Name, DOB, MRN) that do not get counted. The Additional Characters entered here will be added to the Total Line Count for the transcriptionist to arrive at the total lines billed to the client.

Billing Unit Divisor – Enter an integer here to override the client default divisor for determining the number of characters in each Billing Unit for this document type. Leave this field blank to use the client default. This number determines how many characters are in each Billing Unit. For example, set this to 1 to bill by each character or 80 to bill for 80 characters per line. If left blank, the default set on the Relationship will be used.

Stat – Check this option to have this document type billed at the stat rate.

Document Priority – This priority determines where dictations of this Document Type reside in the transcription pool. Priority 1 will be sent to a transcriptionist first, priority 10 will be sent last.

Import/Export Information

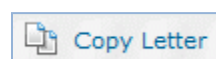
InTouch Document ID – This number will be entered into the InTouch telephone dictation system to select the specific document type they are dictating.

Client Code – This is a text field that is used to identify this document type to the Client's electronic repository (EMR). This is only used when electronically uploading the document to the Client's systems.

Document Type Security & Document Type Pools

- Document Type Security allows you to limit which Document Types can be seen by a User when using the Search All Folder. This is accomplished by assigning Document Types to Security Groups and enabling the Security Group to the User. A User who has been enabled to one or more Security Groups can only find Document Types that are defined in those Security Group(s) when using the Search All Folder. If you turn ON the "User Security In Workflow" option (in Maintenance > Client Defaults > Workflow Settings), you extend these Security Group settings to the Document Types in the Workflow folders. Document Type Security Groups are created in Maintenance > Document Security. You can add this Document Type here to any of the defined Security Groups. If you don't need to limit access to certain Document Types in Search All, leave the "Default" selected.
- Document Type Pools allow you to group related Document Types together to control what type of documents are sent to which transcriptionist, based on their expertise. A typical use is to create an "Inpatient" and "Clinic" Document Type Pool. Some transcriptions are only sent Clinic documents; others with a higher skill set are sent both Inpatient and Clinic documents. If there isn't a need to separate documents by expertise, leave the "Default" selected.

Copy Document Type






- This will copy an existing document type to a new document type.

Edit Print Template


 Edit Print Template for Letter

Document Specifics

Edit Print Template for Document Type		
User	Default Template for All Users ▼	 retrieve template
Location	Default Template for All Locations ▼	 delete template

- To associate a print template with a specific User and/or Location, select the criteria, alter the desired options, then click Save.
- To retrieve a template for an existing User and/or Location, select the criteria and press the "Retrieve Template" button.
- To delete a template for an existing User and/or Location, select the criteria and press the "Delete Template" button.

Document Margins

Document Margins		
Top Margin	<input type="text" value="0.5"/> inches	
Bottom Margin	<input type="text" value="0.75"/> inches	
Left Margin	<input type="text" value="0.75"/> inches	
Right Margin	<input type="text" value="0.75"/> inches	
Top Margin <i>page 1</i>	<input type="text" value="0"/> inches	
Bottom Margin <i>page 1</i>	<input type="text" value="0"/> inches	
Left Margin <i>page 1</i>	<input type="text" value="0"/> inches	
Right Margin <i>page 1</i>	<input type="text" value="0"/> inches	

Top, Bottom, Left, and Right Margins – This will set the page margins for pages 2 and on.



Top, Bottom, Left, and Right Margins Page 1 –This will set the page margins for page 1 only.

Document Headers and Footers

Document Headers and Footers ?	
HTML Page Header <i>page 1</i>	<input type="text"/>
HTML Page Header	<input type="text" value="file=\\EMDAT.COM\T\PT\0DefaultTemplates\Header2_11_arial.asp"/>
HTML Page Footer <i>page 1</i>	<input type="text"/>
HTML Page Footer	<input type="text"/>

- Changes in these fields are best handled by the eScription One print templates department. To submit a Print Template request please go to esone.support@DeliverHealth.com and select Print Templates.

Template Options

Template Options	
Orphan Height	<input type="text" value="2"/> inches
Page Footer	<input type="text"/>
Cover Letter	 preview
Transcription	 preview
Custom Template	<input checked="" type="checkbox"/> <p><i>This checkbox is turned ON by Emdat when a print template is created by our department. Unchecking this checkbox will remove the template.</i></p>

- **Orphan Height** – This setting determines how much transcription text is required on the last page of the transcription. For example, if the setting is 2 inches; then if the last page of transcription will have less than 2 inches on it, the bottom margin is increased for the whole document incrementally until the last page has the required length of 2 inches.
- Changes in these fields are best handled by the eScription One print templates department. To submit a Print Template request please go to esone.support@DeliverHealth.com and select print templates.

Cover Letter Margins

Cover Letter Margins	
Cover Top Margin	<input type="text" value="0.5"/> inches
Cover Bottom Margin	<input type="text" value="1"/> inches
Cover Left Margin	<input type="text" value="0.75"/> inches
Cover Right Margin	<input type="text" value="0.75"/> inches

- Set the margin for the cover letter only in this section.

Cover Letter Headers and Footers

Cover Letter Headers and Footers	
Cover Letter Header <i>page 1</i>	<input type="text"/>
Cover Letter Header	<input type="text"/>
Cover Letter Footer <i>page 1</i>	<input type="text"/>
Cover Letter Footer	<input type="text"/>

- Changes in these fields are best handled by the eScription One print templates department. To submit a Print Template request please go to esone.support@DeliverHealth.com and select print templates.

Associate Headers and Footers (ShadowPrint)

Associate Headers and Footers (ShadowPrint)	
HTML Page Header <i>page 1</i>	<input type="text"/>
HTML Page Header	<input type="text"/>
HTML Page Footer <i>page 1</i>	<input type="text"/>
HTML Page Footer	<input type="text"/>
HTML Watermark	Copy <input type="button" value="v"/>

- These fields are used to show different headers and footers or watermark when using ShadowPrint
- Changes in these fields are best handled by the eScription One print templates department. To submit a Print Template request please go to esone.support@DeliverHealth.com and select print templates.

Clinician Headers and Footers (ShadowPrint)

Clinician Headers and Footers (ShadowPrint)	
HTML Page Header <i>page 1</i>	<input type="text"/>
HTML Page Header	<input type="text"/>
HTML Page Footer <i>page 1</i>	<input type="text"/>
HTML Page Footer	<input type="text"/>
HTML Watermark	Copy <input type="button" value="v"/>

- These fields are used to show different headers and footers or watermark when using ShadowPrint
- Changes in these fields are best handled by the eScription One print templates department. To submit a Print Template request please go to esone.support@DeliverHealth.com and select print templates.

Edit Document Template

Edit Document Template for Letter

Selection Criteria

Documents Letter - Letter

Users Default for All Users

Locations Default for All Locations

Show Inactive Documents

Associated Templates

Standard Templates

All Users / All Locations
 Master, Administrative / All Locations

Add/Edit
Copy
Delete

From the above drop-down menus select the appropriate document type, user, and location. Then click add/edit. If there is an existing template available for the selected criteria InCommand will bring that into an editing screen.

Times New Roman | 3 (12pt) | Normal | B I U S Q T | Fields Functions | 100%

[As Dictated]

Qualified Text will appear in Yellow. Mark with "QT" button on toolbar.

NotesAllow MT to Dismiss this Note

save
cancel





If there is no template currently available InCommand will pull up a blank editor window. There is also a section underneath the document template called MT notes. In this area you can provide instructions for MT's specific to this document template. There is a check box to the right of this field titled Allow MT to dismiss this note. When checked, an MT will be able to prevent this note from loading again, unless a change is made to the note. If left unchecked, an MT will not be allowed to suppress this note after viewing it. Once you are satisfied with the document template be sure to click

save. You are also able to copy or delete an existing document template by selecting the template and clicking copy or delete.

Edit ShadowScribe Users


 Edit ShadowScribe Users for ALERT

Edit ShadowScribe User Exclusions ?

Included Users		Excluded Users
Doe, John (jdoe) Jénkins, Léroy (ljénkins) Master, Administrative (admin) O'Malley, John (jomalley) test, test (test) test2, test2 (test2) Therapist, John (jtherap) Therapist, Steven (stherapi)	<div style="margin-bottom: 5px;">exclude all </div> <div style="margin-bottom: 5px;">exclude </div> <div style="margin-bottom: 5px;"> include</div> <div style="margin-bottom: 5px;"> include all</div>	
Enable selected document for ShadowScribe <input checked="" type="checkbox"/>		

This screen is used to exclude a ShadowScribe user from the current selected document type. You can specify excluded users and still make changes to their templates while the "Enable selected document for ShadowScribe" is not checked.

Edit Document Price

 Edit Document Price

WARNING Entering prices by document type will override the per-line pricing that is setup for this client. When a document is delivered of this type, the amount entered here will be a flat rate. Enter 0 if you do not wish to set a flat price.

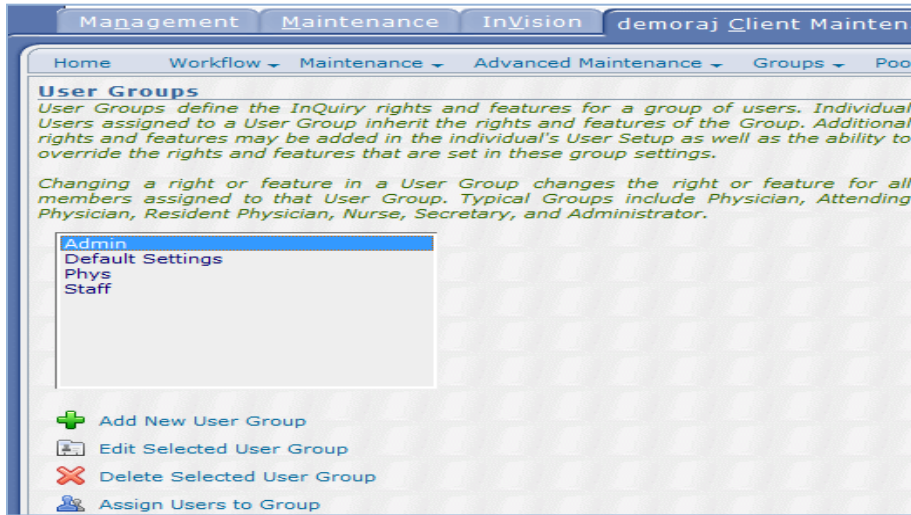
Edit Document Price ?

Document Price for Client \$0

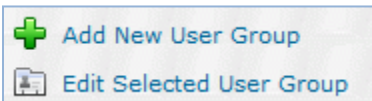
User Groups

User Groups define the InQuery rights and features for a group of users. Individual Users assigned to a User Group inherit the rights and features of the Group. Additional rights and features may be added in the individual's User Setup as well as the ability to override the rights and features that are set in these group settings.

Changing a right or feature in a User Group changes the right or feature for all members assigned to that User Group. Typical Groups include Physician, Attending Physician, Resident Physician, Nurse, Secretary, and Administrator.



Add or Edit User Group



To add a new user group click add new user group. To edit, select group and click edit.

User Group Information

User Group Information	
User Group Name	<input type="text" value="Phys"/>
User Group Description	<input type="text" value="Physicians"/>

User Group Name – Please enter a meaningful short description for the User Group being defined. This User Group Name can be selected in User Setup to give the User the Features and Rights selected in this Group. 50 characters max. Typical names are Staff, Admin, Physicians, Attending's, Residents, Nurses, E-Sign Physicians, Manual-Sign Drs...

User Group Description – This is the long description of this User Group. 500 characters maximum. Does not show up elsewhere in system.

Dictating Clinician Options

Attribute	Group
User Dictates	<input checked="" type="checkbox"/>
Utilize Autofax	<input checked="" type="checkbox"/>
Use Electronic Signature	<input checked="" type="checkbox"/>
Send Fax Cover Page	<input type="checkbox"/>
Skip Preliminary Folder	<input type="checkbox"/>
Access to My Templates	<input type="checkbox"/>
Prompt for My Templates	<input type="checkbox"/>
Require Additional Signature	<input type="checkbox"/>
Require Attestation Statement for Additional Signatures	<input checked="" type="checkbox"/>
Attestation Template	None
Auto-Complete Additional Signatures	<input type="checkbox"/>
Additional Signature Text	

User Dictates – Check if the users in this group will be dictating.

Utilize Autofax – Check if the users in this group will use eScription One's Autofax feature.

Use Electronic Signature – If checked, the Electronic Signature Mark is applied when this user completes the transcription from their Preliminary Folder. If a graphical signature is setup for this user, the Mark is the graphical signature and will be displayed in the Signature Section of the Transcription. If no graphical signature, the Mark of "Electronically approved by:" will be placed above the clinician's name in the Signature Section.

Send Fax Cover Page – Turn ON to send a cover page when transcriptions for this user are faxed.

Skip Preliminary Folder – Check to force all transcriptions to skip the preliminary folder. This cannot be used with electronic signatures.

Access To My Templates – Check this to give the users in this group access to the "My Templates" tab in InQuery.

Prompt For My Templates – If Access to My Templates is enabled, this feature turns on a welcome message the next time the user logs into InQuery. The message will prompt the user to execute a wizard which will step them through customizing their document and dictation templates. When they complete the wizard or choose to turn off the message, this option is turned off. If turned on in the future by the MTSO, the InQuery User again gets the welcome message.

Require Attestation Statement for Additional Signatures - If a clinician is set as an additional signature and that clinician has an attestation statement set, the attestation will be used when the clinician is asked to sign. Note that this must be on in conjunction with the (document type / user) setting of the same name.

Require Additional Signature – Check this if the users in this group will require an additional authenticator for their transcriptions.

Attestation Templates – Attestation Templates are for clinicians who will be adding their signature as a required second signature to a Transcription. The clinician has the ability to select from multiple pre-defined templates. This is the Default template presented during the signature process. The text from the template is inserted between the previous signature

and this clinician's signature and can be modified or deleted. This is typically used for an Attending physician to add an Attestation Statement to the Transcription dictated by a Resident. The Templates are created in Templates > Dictation Templates.

Auto Complete Additional Signatures – If checked, the additional signatures required for any Transcriptions from this dictator will be automatically applied. That is, when this User completes the Transcription from the Preliminary Folder, the Transcription will bypass the Preliminary Folder of all Additional Authenticators and their signatures will be affixed to the Transcription. This option is rarely used and doesn't conform to rules governing electronic signatures. It is primarily used where more than one clinician sees a patient, the report is from both clinician's even though one dictates, and the clinician's operating practice is to have both signatures on the Transcription.

Additional Signature Text – This text is added immediately after the Signature Line (the clinician's name and credentials) in the signature area of the transcription. Start the line with
 to force this Text to start on the line below the Signature Line. (
 is the HTML version of a carriage return.) You can use
 to create multi-line text. For example "
Attending Physician
Department of Medicine
University of Springfield Hospital" will print on three lines.

Force to Review1 and/or Review2	<input type="checkbox"/>
Price Modifier	\$ 0
Qualified Text Rate Modifier	\$ 0
Auto Copy as Associate	<input checked="" type="checkbox"/>
Dictating Clinician Default Document Type	All Document Types
Dictating Clinician Default Location	All Locations
Dictation Emulation	Client Default
Enable Cover Letters	<input checked="" type="checkbox"/>
Enable Envelopes	<input checked="" type="checkbox"/>
Time Zone	Use Client's Time Zone
Mobile Apps Can Save Password	<input type="checkbox"/>

Force To Review1 and /or Review2 – Checking this option will force all transcriptions for all users in this group to the review folder.

Price Modifier – This allows you to increase or decrease the rate for members of this group.

Qualified Text Rate Modifier – This allows you to increase or decrease the qualified text rate for members of this group.

Auto Copy As Associate – Checking this will automatically add the user as an associate to all of their transcriptions.

Dictating Clinician Default Document Type – All Transcriptions are assigned a document type. If a document type is not specified during upload then this document type is used.

Dictating Clinician Default Location – This will set the default location for all members of this group.

Dictation Emulation – For InTouch Users, this is the set of prompts that the Telephone Dictation System asks at the beginning of each dictation (e.g. "Enter patient ID") and the keyboard commands available to users while dictating (e.g. "2" to Record and "#" to End dictation). If you don't see an emulation that meets your needs custom emulations are available, please contact the eScript One helpdesk for these requests.

Enable Cover Letters – Uncheck to turn off cover letters for members of this group.

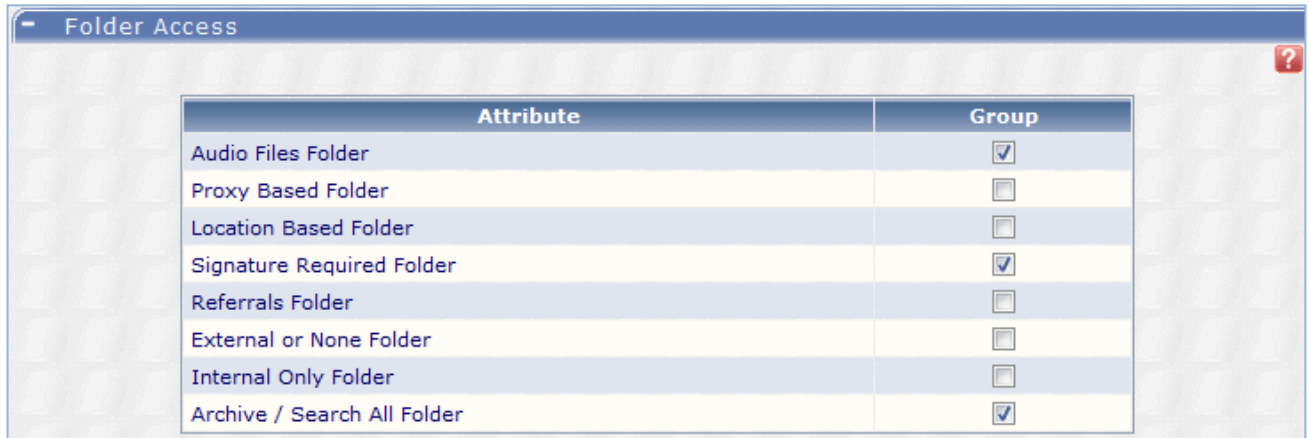
Enable Envelopes – Uncheck to turn off envelopes for members of this group.

Time Zone – The time zone of a dictating clinician is used by the system to determine the correct time zone for the date and time the dictation was received.

Mobile Apps Can Save Password – Allow this user to save their password on their mobile device, such as the iPhone and Android applications. If this is not checked, this user will be required to enter their password every time they use the application.

Folder Access

– Check any or all of the above folders to give the group access to the selected folders.



Attribute	Group
Audio Files Folder	<input checked="" type="checkbox"/>
Proxy Based Folder	<input type="checkbox"/>
Location Based Folder	<input type="checkbox"/>
Signature Required Folder	<input checked="" type="checkbox"/>
Referrals Folder	<input type="checkbox"/>
External or None Folder	<input type="checkbox"/>
Internal Only Folder	<input type="checkbox"/>
Archive / Search All Folder	<input checked="" type="checkbox"/>

Access Rights

Attribute	Group
Edit Header After Authentication	<input checked="" type="checkbox"/>
Unrestricted Edit After Authentication	<input type="checkbox"/>
Add Associate to Database	<input checked="" type="checkbox"/>
Can Print Originals	<input checked="" type="checkbox"/>
View Comments	<input checked="" type="checkbox"/>
Can Export Manually	<input type="checkbox"/>
Return Transcription To Review	<input checked="" type="checkbox"/>
Add Patient's PCP	<input checked="" type="checkbox"/>
Access to InVision Reports	<input type="checkbox"/>
Modify Patient Letters	<input checked="" type="checkbox"/>
Invalidate Transcriptions	<input checked="" type="checkbox"/>
Access to Invalids	<input type="checkbox"/>
Override Document Security Group Restrictions	<input type="checkbox"/>
Facsimiles	<input checked="" type="checkbox"/>
Access to Fax On Demand	<input checked="" type="checkbox"/>
Access to Problem Lists	<input type="checkbox"/>
Edit Problem Lists	<input type="checkbox"/>
Access to ShadowPrint Management	<input type="checkbox"/>
Access to ShadowLink Management	<input type="checkbox"/>
Restore/Administrative Log View	<input checked="" type="checkbox"/>
Inquiry Time-Out	<input type="text" value=""/> minutes
Show Download Icon in Preliminary Folder List	<input type="checkbox"/>
Show Download Icon in Transcription Viewer	<input type="checkbox"/>
Default Download Format	PDF ▾

Edit Header After Authentication- This allows users to change the demographic information in a transcription after it has moved past the Preliminary Folder, including when the transcription is in the Search All. This also allows the Associates to be added or changed.

Unrestricted Edit After Authentication- This allows users to change the entire transcription including demographic information, transcription text, and associates after it has moved past the Preliminary, including when the transcription is in the Search All.

Add Associate to Database- Turn ON to allow User (users with this User Group) to add or edit Associate records while editing a transcription. (That is, from within the InQuery editor.) Associates are clinicians, typically outside of your organization, that you send copies of your transcriptions. They may also be other physicians inside your organization. Within the eScription One system, inside Associates can be sent copies via their Referral Folder.

Can Print Originals- This option allows a User (or all users in this User Group) to print transcriptions without the "Copy" watermark in any folder. It does not override the "Preliminary" watermark.

View Comments- This allows a user to open the Comments in order to view, edit, or create new comments. Comments are small messages that a transcriptionist can send to the user to point out problems with the dictation such as missing information. Comments may also be used between the Physician and Staff to follow up on some aspect of the documentation.

Can Export Manually - when an Export Rule is defined, this user will be able to manually trigger an Export on any transcription.

Return Transcriptions To Review- This allows a user to send a transcription back to the Review 1 Folder from the Preliminary Folder. A physician would typically use this to request some editing by the staff. This is done on the Info screen which is selected while editing a transcription.

Add Patient's PCP- User (users in this User Group) may add a Primary Care Provider (PCP) to a patient when editing an Associate.

Access to InVision Reports- Turn this ON to allow access to the eScription One Management Reports. A "Report" link and an InVision tab are placed on the Users Home Page to link to the report section. Production reports may be limited in Groups > Report Groups.

Modify Patient Letters- Turn ON to allow User (users in this User Group) to enter the Patient database while editing a transcription to add or edit patient information such as address, date of birth.

Invalidate Transcriptions- Turn ON to allow these users to invalidate transcriptions. Invalidate moves the transcription out of the Workflow or Folder and into the Invalidated (trash can) Folder.

Access to Invalids- Turn ON to allow users to open the Invalidated Folder (trash can). This allows them to view any Invalidated transcription and also allows these users to move the Invalid transcription back into the Workflow Folders.

Override Document Security Group Restrictions- Bypass Security Groups for this User/User Group.

Facsimiles- Turn ON to place a link called "Facsimiles" on the User's Search All Folder page that, when clicked, runs a report to display the status of all faxes. This includes faxes that were successfully sent as well as faxes that failed, and the reason they failed. This will also add a summary of Queued and Failed faxes to the user's home tab in InQuery.

Access to Fax on Demand- This allows the user to select the Fax button when viewing a transcription that will then prompt the user for a name and number to fax the transcription to.

Access to Problem Lists- Turn ON to allow access to the Problem List product within the eScription One System. This puts a Problem List Tab in InQuery to the right of the Workflow Tab.

Edit Problem Lists- This allows the user to edit information in the Problem List for patients.

Access to ShadowPrint Management- Turn ON to allow access to the ShadowPrint product within the eScription One System. This puts a ShadowPrint Tab in InQuery.

Restore/Administrative Log View- Turn ON to allow users to have the full Log View when they select the Info button while reviewing a transcription. This provides access to Prior Versions of the transcription Body.

InQuery Time-Out- Minutes of inactivity before InQuery times-out. This setting overrides the global setting in Client Defaults > Non-workflow Settings. Minimum is 15, maximum is 1440 (24 hours). When the Time-Out limit is met, the user is logged out and the InQuery sign-on screen is presented to the user. Activity is defined as changes or requests to the database. If this timer is set to 15 minutes and you spend 30 minutes editing a transcription, you will be timed out when you attempt to save the transcription.

Show Download Icon in Preliminary Folder List – This option allows a User (or all users in this User Group) to download transcriptions in the Preliminary Folder.

Show Download Icon in Transcription Viewer—This option allows a User (or all users in this User Group) to download transcriptions in the Transcription Viewer.

Default Download Format—The default format transcriptions can be downloaded in Transcription Viewer or Preliminary Folder. Users still have an option to change this format before downloading.

Maintenance Access

Maintenance Access	
Attribute	Group
Maintenance - Client Defaults	<input type="checkbox"/>
Maintenance - Associates	<input type="checkbox"/>
Maintenance - Documents	<input type="checkbox"/>
Maintenance - Users	<input type="checkbox"/>
Maintenance - Templates	<input type="checkbox"/>
Maintenance - Interfaces	<input type="checkbox"/>
Maintenance - ShadowPrint	<input type="checkbox"/>
Maintenance - Groups	<input type="checkbox"/>

Maintenance Client Defaults – Check to allow User to edit the eScription One Client setup. This is a very dangerous feature as it could allow this User to change every Workflow aspect of the eScription One system. Access to the Client setup menus is through the Maintenance link on the Users Home Page.

Maintenance Associates – This allows the User to enter the Maintenance menu (from User's Home page) and turns ON the ability to Open the Associate database, Associate Type (if this feature is turned on in the Client setup), and Patient database. The user can add, edit, and delete Associate and Patient records. Typically, most staff has access to this. Most clinicians don't want access.

Maintenance Documents – This turns ON the User's ability to enter the Document Type and Print Template menu from the Maintenance link on the User's home page. This provides full add, edit, or invalidation capabilities. This feature should not be turned ON except to those who administer the eScription One Client, and then to only those with training.

Maintenance Users – This allows the User to add, edit, and inactivate users of the system. Only Client administrators should be given access to this menu as they can enable any user to access the Client Setup which could adversely affect the entire system.

Maintenance Templates – This allows the user to add and edit document templates and dictation templates. It also gives access to print templates and to change the print templates addresses.

Maintenance Interfaces – This allows the user to setup Interfaces.

Maintenance ShadowPrint – This allows the users to setup ShadowPrint.

Maintenance Groups – This allows the User to setup User Groups and Proxy Groups when the Maintenance–Users role is also checked, Reports Groups when Access to Reports is checked, and Location Groups when the Maintenance–Client Defaults is checked.

Restrictions

Restrictions	
Attribute	Group
Restrict Archive / Search All to Location	<input checked="" type="checkbox"/>
Restrict Archive / Search All to User	<input type="checkbox"/>
Restrict Archive / Search All to Loc/Proxy	<input type="checkbox"/>
Restrict Archive / Search All to Proxy	<input type="checkbox"/>
Restrict Reports by Location	<input checked="" type="checkbox"/>
Restrict Reports by Proxy	<input type="checkbox"/>

Restrict Search All to Location – This will limit search results to locations the user has access to.

Restrict Search All to User – This will restrict search results to transcriptions created by the user.

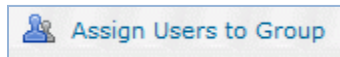
Restrict Search All to Location/Proxy – Restrict which transcriptions can be found using the Search All Folder to (1) those having the same location as this User and (2) to those dictated by Users that this user has Proxy rights to. Proxy rights to another user give this user some rights to see or edit the second user's transcriptions. Proxy rights are defined in individual User Profile or in User Groups.

Restrict Search All to Proxy – This will restrict search results to transcriptions with dictators the user has proxy to.

Restrict Reports by Location – This will limit report access to only locations the use has access to.

Restrict Reports by Proxy – This will limit report access to only dictators the user has proxy to.

Assign Users To Group



Assign Users To Group Phys

Users in Group

- Doe, John (jdoe)
- Jenkins, Léroy (ljenkins)
- O'Malley, John (jomalley)
- test, test (test)
- test2, test2 (test2)
- Therapist, John (jtherap)
- Therapist, Steven (stherapi)

← add all

← add

remove →

remove all →

Available Users

- Master, Administrative (admin)

Show Inactive Users

To add or remove users from a group select the applicable group and then select assign users to group. From here you will be able to add or remove users from the users in group section with the arrow buttons.

Users

The screenshot shows the 'Users' management interface. At the top, there is a list of users in a scrollable area. The selected user is 'Doe, John - jdoe'. Below the list, there is a checkbox for 'Show Inactive Users'. A green plus icon is used to 'Add New User'. A series of icons represent various actions for the selected user 'Doe, John', including editing, copying, proxying, location access, reports, location editing, auto-copy associates, additional signatures, signature image upload, dictation templates, shadowscribe options, linking to referring client, and scheduling resources. At the bottom, there are icons for 'Copy All Users to Associates', 'Edit Settings For All Users', 'Locked Users', and 'User Inventory Report'.

Users

- Admin, Sally - sadmin
- Doe, John - jdoe**
- Jenkins, Léroy - ascii
- jkh, g - test123
- Master, Administrative - admin
- NoLetters, Jon - asdf
- O'Malley, John - jomalley
- Staff, Adam - astaff
- Staff, Lisa - lstaff
- Test, Glen - gtest

Show Inactive Users

Add New User

Edit Doe, John

Copy Doe, John to New User

Proxy for Doe, John

Location Access for Doe, John

InVision Reports for Doe, John

Edit Locations for Doe, John

Auto-Copy Associates for Doe, John

Additional Signatures for Doe, John

Upload Signature Images for Doe, John

Edit Dictation Templates for Doe, John

Manage ShadowScribe Options

Link To User Of Referring Client

Schedule Resources for Doe, John

Copy All Users to Associates

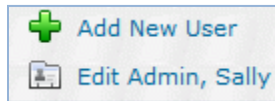
Edit Settings For All Users

Locked Users

User Inventory Report

Show Inactive Users– This will show users who are no longer active in the eScripton One system.

Add/Edit New User



To add or edit a user click on the add new user or edit user from the page above.

User Information

User Information	
User Telephone "InTouch" Dictation ID	109778
Name (First/Middle/Last)	John <input type="text"/> <input type="text"/> Doe <input type="text"/> *
Prefix (Dr., Mrs., etc.)	Dr. <input type="text"/> Suffix (M.D., etc.) M.D. <input type="text"/>
Use Comma	<input checked="" type="checkbox"/> <input type="button" value="copy to associate"/>
User Name	jdoe <input type="text"/> *
Password	<input type="password"/> <input type="button" value="generate temporary password"/>
Department	Physicians <input type="text"/>
Title	Doctor of Healing <input type="text"/>
Specialty	<input type="text"/>
User Type	Resident <input type="text"/>

Name First Middle Last – The first and last name are required fields. The middle field is for a middle initial but is not required.

Prefix – This is the title of the user, such as Dr. Mr. or Mrs.

Suffix – This is the credentials of the user such as M.D.

Use Comma – When checked this will add a comma between the users name and the suffix.

Username – This is used to login to InQuery. There is an 8 character maximum length for this field.

Password – This is the users InQuery password. There is an 8 character maximum length for this field.



Generate Temporary Password – This button will generate a new temporary password that contains 1 symbol, 1 number and 1 uppercase letter and is 6 characters long. When a password is set with this button, you can see the generated password, but not edit it.

Department – Departments are used in Billing Detail Reports to summarize costs by dictators' Department and for use in customizing the transcription letterhead where multiple departments share the same eScription One Location.

Title – Not used in system. Provided for Client to record information about user.

Specialty – Not used in system. Provided for Client to record information about user.

User Type – A drop-down menu of different types of users. Not used in system. Provided for Client to record information about user.

Notification E-Mail	<input type="text"/>
Real Time Notification	<input type="checkbox"/>
Notification Week Days for Preliminary	<input type="checkbox"/> Include users to which this user has proxy <input type="text"/>  Add New Notification Time  Remove Notification Time
Notification Week Days for Referral	<input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> Sunday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Wednesday
User E-Mail	<input type="text"/>
User Active	<input checked="" type="checkbox"/>
Client Code	<input type="text"/>

Notification E-Mail – A message will be sent to this email address every morning at 9:00 am Central Time if there are any transcriptions in this User's Preliminary or Referral Folders. Please note, this email address could be for this user or for a staff member.

Real time Notification – Turn ON to have email sent to the notification email address every time a transcription enters this User's Preliminary Folder.

Notification Week Days for Preliminary – The notification email address will be sent an e-mail on the specified days of the week if there are any Transcriptions in the user's Preliminary folder. A user can also be notified when documents from other clinicians that the user has proxy to are in the Preliminary folder.

Notification Week Days for Referral – The notification email address will be sent an e-mail on the specified days of the week if there are any Transcriptions in the user's Referral folder. Notifications are sent between 7 AM and 8 AM on selected days.

User E-Mail – When the user submits a "Forgot Password" request to eScription One. eScription One will e-mail the password to their email address entered here. On the InQuiry sign-in page, the user clicks the "Forgot Password?" link next to the password box. The next screen asks for their eScription One User ID and Client Code. eScription One will email the password for that User ID / Client to this email address.

User Active– When checked the user is active, or "on". When unchecked the user is inactive, or "off".

Client Code – This is the code used to uniquely identify this user for Clients that are setup to upload transcriptions to their EMR.

Unlock User – If a user account is locked, then text will appear at the top of the setup screen notifying of the status and this button will appear in the User Information section:



Group Assignment

Group Assignment	
User Groups	Admin
Proxy Groups	No Group Assigned
Report Groups	No Group Assigned
Location Groups for Location-based Folders	Admin
Location Groups for Proxy-based Folders	All Locations

User Groups – Select a user group to add a user to from a drop-down menu with all previously created user groups.

Proxy Groups – A Proxy Group is a list of dictators. By assigning this User to a Proxy Group, you are allowing this User to access transcriptions in dictators' Preliminary and Dictations Folders for the entire Proxy Group. If the Review 1 and Final 1 folders are set up for Proxy-based Access, this User may also access transcriptions from these folders.

Report Groups – Report Groups define which eScription One reports may be executed. Reports are not transcriptions. They are information about transcriptions, such as turnaround time, billing, and User Lists.

Location Groups for Location-based Folders – Select the Location Group that will be used to limit which transcription this User may see while in the Workflow Folders. The Location Group is defined in Groups > Location Groups > Location Folder Location Groups. This feature is valid only if Workflow Folders are Location based which is set in Client Defaults > Workflow Settings.

Location Groups for Proxy-based Folders – Select the Location Group that will be used to limit which transcription this User may see while in the Workflow Folders. The Location Group is defined in Groups > Location Groups > Proxy Folder Location Groups. This feature is valid only if Workflow Folders are Proxy based, which is set in Client Defaults > Workflow Settings.

Telephone Dictation Options

Telephone Dictation Options	
Dial-In Dictation ID	<input type="text"/>
InTouch PIN	<input type="text"/>
User Telephone "InTouch" Dictation ID	109778
Reset Recorded Name	 reset

Dial In Dictation ID – This option is only for Clients who make arrangements to have a unique dial-in number to access the eScription One InTouch Telephone Dictation System. When that occurs, this is the Client-specified dictation ID for this user.

InTouch PIN – The PIN is used to secure InTouch when listening to prior dictations. The PIN will only be required by the system when a user attempts to listen to prior dictation for a given patient.

Note: Dictation Review must be enabled within the emulation for this section to function.

User Telephone "InTouch" Dictation ID – This is the automatically generated InTouch ID for the dictator to use when using the default InTouch phone numbers.

Reset Recorded Name – The first time a user calls into the InTouch system they will be asked to record their name for identification purposes. The recorded name can be erased/reset by pressing this button. The name reset may take up to an hour to apply. The next time the User calls the InTouch system they will be prompted to record their name again.

Dictating Clinician Options

Attribute	Result	Group	User
User Dictates			<input type="checkbox"/>
Utilize Autofax	✓	✓	<input checked="" type="checkbox"/>
Use Electronic Signature			<input type="checkbox"/>
Send Fax Cover Page	✓		<input checked="" type="checkbox"/>
Skip Preliminary Folder			<input type="checkbox"/>
Access to My Templates			<input type="checkbox"/>
Prompt for My Templates			<input type="checkbox"/>
Require Additional Signature			<input type="checkbox"/>
Require Attestation Statement for Additional Signatures	✓	✓	<input checked="" type="checkbox"/>
Attestation Template	None		<input type="checkbox"/>
Auto-Complete Additional Signatures			<input type="checkbox"/>
Additional Signature Text			<input type="checkbox"/>

User Dictates – Check this option if the user will dictate.

Utilize Autofax – Check this option if the user wishes to use Autofax.

Use Electronic Signature – If checked, the Electronic Signature Mark is applied when this user completes the transcription from their Preliminary Folder. If a graphical signature is setup for this user, the Mark is the graphical signature and will be displayed in the Signature Section of the Transcription. If no graphical signature, the Mark of "Electronically approved by:" will be placed above the clinician's name in the Signature Section.

Send Fax Cover Page – Turn ON to send a cover page when transcriptions for this user are faxed.

Skip Preliminary Folder – Check to force all transcriptions to skip the preliminary folder. This cannot be used with electronic signatures.

Access to My Templates – This will give the user access to the "My Templates" tab in InQuery.

Prompt For My Templates – If Access to My Templates is enabled, this feature turns on a welcome message the next time the user logs into InQuery. The message will prompt the user to execute a wizard which will step them through customizing their document and dictation templates. When they complete the wizard or choose to turn off the message, this option is turned off. If turned on in the future by the MTSO, the InQuery User again gets the welcome message.

Require Additional Signature – Turn ON if these dictators require a second signature when completing or electronically signing a transcription. This is typically ON for Resident physicians, Fellows, Nurse and Nurse Practitioners and Physician Assistants. This only applies to Document Types that Require Additional Signature.

Require Attestation Statement for Additional Signatures – If a clinician is set as an additional signature and that clinician has an attestation statement set, the attestation will be used when the clinician is asked to sign. Note that this must be on in conjunction with the (document type/ user) setting of the same name.

Attestation Templates – Attestation Templates are for clinicians who will be adding their signature as a required second signature to a transcription. The clinician has the ability to select from multiple pre–defined templates. This is the Default template presented during the signature process. The text from the template is inserted between the previous signature and this clinician's signature and can be modified or deleted. This is typically used for an Attending physician to add an Attestation Statement to the transcription dictated by a Resident. The Templates are created in Templates > Dictation Templates.

Auto-Complete Additional Signatures – If turned ON, the additional signatures required for any transcriptions from this dictator will be automatically applied. That is, when this User completes the transcription from the Preliminary Folder, the transcription will bypass the Preliminary Folder of all Additional Authenticators and their signatures will be affixed to the transcription. This option is rarely used and doesn't conform to rules governing electronic signatures. It is primarily used where more than one clinician sees a patient, the report is from both clinician even though one dictates, and the clinician's operating practice is to have both signatures on the transcription.

Additional Signature Text – This text is added directly below the signature for this user. You will want to start this text with a line break
 to start the text below the signature, otherwise the text will be next to the signature.

Force to Review1 and/or Review2		<input type="checkbox"/>
Price Modifier (per Line)	\$0	<input type="checkbox"/>
Qualified Text Rate Modifier	\$0	<input type="checkbox"/>
Auto Copy as Associate		<input type="checkbox"/>
Dictating Clinician Default Document Type	Consult - Consult	<input checked="" type="checkbox"/>
Dictating Clinician Default Location	Kentwood	<input checked="" type="checkbox"/>
Audio Playback Method	Use Client Default	<input type="checkbox"/>
Dictation Emulation	Client Default	<input type="checkbox"/>
Enable Cover Letters		<input type="checkbox"/>
Enable Envelopes		<input type="checkbox"/>
Time Zone	Use Client's Time Zone	<input type="checkbox"/>
Mobile Apps Can Save Password		<input type="checkbox"/>
Can Save Password in InSync		<input type="checkbox"/>
Can Resume Mobile Session		<input type="checkbox"/>
Preferred Transcription Format	Structured	<input checked="" type="checkbox"/>
Dictating User Pools	<input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> Default User Pool	

Force to Review1 and/or Review2 – Turning this option ON will force all transcriptions for these Users into the Review 1 and/or Review 2 Folders. If OFF, transcriptions go to these folders depending on setting in Client Default > Workflow Settings or if a transcriptionist sends them to these Folders. This option is disabled if these Folders are not Activated in Client Default > Workflow Settings.

Price Modifier – This allows you to either increase or decrease the rate for this user.

Qualified Text Rate Modifier– This allows you to either increase or decrease the qualified text rate for this user.

Auto Copy as Associate – Checking this option will automatically add this user as an associate on all of their transcriptions.

Dictation Clinician Default Document Type – all Transcriptions are assigned ad document type. If a document type is not specified during upload then this document type is used.

Dictating Clinician Default Location – This option will assign the user a location to default to if no other location is specified.

Audio Playback Method - Choose Audio Playback Method for dictations played in InQuery.

Dictation Emulation – For InTouch Users, this is the set of prompts that the Telephone Dictation System asks at the beginning of each dictation (e.g. "Enter patient ID") and the keyboard commands available to users while dictating (e.g. "2" to Record and "#" to End dictation). If you don't see an emulation that meets your needs custom emulations are available, please contact the eScription One helpdesk for these requests.

Enable Cover Letters – Checked by default, this will create cover letters for this user.

Enable Envelopes – Checked by default, this will create envelopes for this user.

Time Zone – The time zone of a dictating clinician is used by the system to determine the correct time zone for the date and time the dictation was received.

Mobile Apps Can Save Password – Allow this user to save their password on their mobile device, such as the iPhone and Android applications. If this is not checked, this user will be required to enter their password every time they use the application.

Can Save Password in InSync - Allow this user to save his InSync password. If this is not checked, this user will be required to enter his password every time he uses InSync application.

Preferred Transcription Format - This determines how transcriptions for the user will be formatted for the MT.
Structured: means transcriptions will be formatted using the structured editor mode where the InScribe ShadowScribe editor will appear with content boxes. Content boxes are usually attached to a specific Title like History of Present Illness. MTs would type or edit text of that section into the content box.

Unstructured: is the traditional format where the transcription is typed normally into the ShadowScribe without MTs typing or editing text within content boxes.

Note: To get a structured document, both the user and the document must be set to "Structured".

Dictating User Pools – This User Pool setting is used to route dictations to transcriptionists. This group setting can be overridden in the individual User Setup. Dictators may also be assigned to more than one pool. If Pool Categories are used (to get more than 31 User Pools), all selected User Pools must be from the same Pool Category. If a User Pool is not selected here, the Default User Pool will be used. The Default User Pool is defined in the Client Setup > Non-Workflow Setting > Default Dictating User Pool.

Folder Access

Attribute	Result	Group	User
Dictations Folder	✓	✓	<input type="checkbox"/>
Review1 Folder			<input type="checkbox"/>
Review2 Folder			<input type="checkbox"/>
Preliminary Folder	✓	✓	<input type="checkbox"/>
Referral Folder	✓	✓	<input type="checkbox"/>
Final1 Folder			<input type="checkbox"/>
Final2 Folder			<input type="checkbox"/>
Search All Folder	✓	✓	<input type="checkbox"/>

Checking any of the above folders will give this user access to those folders.

Access Rights

Access Rights			
Attribute	Result	Group	User
Edit Header After Authentication	✓	✓	<input type="checkbox"/>
Unrestricted Edit After Authentication			<input type="checkbox"/>
Add Associate to Database	✓	✓	<input type="checkbox"/>
Can Print Originals	✓	✓	<input type="checkbox"/>
View Comments	✓	✓	<input type="checkbox"/>
Can Export Manually			<input type="checkbox"/>
Return Transcription To Review	✓	✓	<input type="checkbox"/>
Add Patient's PCP	✓	✓	<input type="checkbox"/>
Access to InVision Reports			<input type="checkbox"/>
Modify Patient Letters	✓	✓	<input type="checkbox"/>

Edit Header After Authentication – This allows users to change the demographic information in a transcription after it has moved past the Preliminary Folder, including when the transcription is in the Search All. This also allows the Associates to be added or changed.

Unrestricted Edit After Authentication – This allows users to change the entire transcription including demographic information, transcription text, and associates after it has moved past the Preliminary, including when the transcription is in the Search All.

Add Associate to Database – Checking this will allow this user to add or edit associates while editing a transcription.

Can Print Originals – This option will allow the user to print transcriptions without the copy watermark from any folder.

View Comments – This allows a user to open the Comments in order to view, edit, or create new comments. Comments are small messages that a transcriptionist can send to the user to point out problems with the dictation such as missing information. Comments may also be used between the Physician and Staff to follow up on some aspect of the documentation.

Can Export Manually – When an Export Rule is defined, this user will be able to manually trigger an Export on any Transcription.

Return Transcription to Review – This option will allow the user to send transcriptions back to the review folder from the preliminary folder.

Add Patient's PCP – This will allow the user to mark an associate as the PCP while editing transcriptions.

Access to InVision Reports – When checked the user will have access to run InVision reports. You select the reports a user should have access to in users>management reports.

Modify Patient Letters – When checked the user will be able to change patient information such as address or birth date in the patient database.

Invalidate Transcriptions	✓	✓	<input type="checkbox"/>
Access to Invalids			<input type="checkbox"/>
Override Document Security Group Restrictions			<input type="checkbox"/>
Facsimiles	✓	✓	<input type="checkbox"/>
Access to Fax On Demand	✓	✓	<input type="checkbox"/>
Access to Problem Lists	✓		<input checked="" type="checkbox"/>
Edit Problem Lists	✓		<input checked="" type="checkbox"/>
Access to ShadowPrint Management			<input type="checkbox"/>
Access to ShadowLink Management			<input type="checkbox"/>
Restore/Administrative Log View	✓	✓	<input type="checkbox"/>
Inquiry Time-Out		<input type="text" value="0"/> minutes	<input type="checkbox"/>
Show Download Icon in Preliminary Folder List			<input type="checkbox"/>
Show Download Icon in Transcription Viewer			<input type="checkbox"/>
Default Download Format		PDF	<input type="checkbox"/>
Document Type Security	<input checked="" type="checkbox"/> Default Group		

Invalidate Transcriptions – When checked the user will be able to invalidate or “delete” transcriptions.

Access to Invalids – Allows the user to open the invalidated folder or trash can.

Override Document Security Group Restrictions– This will bypass security groups for this user.

Facsimiles – This will give the user the facsimiles tab in InQuery and access to all faxes sent for the client. This will also add a summary of Queued and Failed faxes to the user’s home tab in InQuery.

Access to Fax on Demand – This will allow the user to fax transcriptions by clicking the fax button. In order for this to work Autofax must be turned on.

Access to Problem Lists – This will give the user the problem list tab in InQuery as well as access to problem lists.

Edit Problem Lists – This will allow the user to edit the problem list for patients.

Access to ShadowPrint Management– This will give the user the ShadowPrint tab in InQuery, as well as access to ShadowPrint settings.

Access to ShadowLink Management – Turn this ON to allow Users access to the ShadowLink product within the eScription One system. This activates the ShadowLink Tab in InQuery.

Restore/Administrative Log View – This will give the user access to the full activity log when they click the info button. This includes restoring previous versions of transcriptions.

InQuery Time Out – Minutes of inactivity before InQuery times–out. This setting overrides the global setting in Client Defaults > Non–workflow Settings. Minimum is 15, maximum is 1440 (24 hours). When the Time–Out limit is met, the user is logged out and the InQuery sign–on screen is presented to the user. Activity is defined as changes or requests to the database. If this timer is set to 15 minutes and you spend 30 minutes editing a transcription, you will be timed out when you attempt to save the transcription.

Show Download Icon in Preliminary Folder List – this option allows a User (or all users in this User Group) to download transcriptions in the Preliminary Folder.

Show Download Icon in Transcription Viewer—This Option allows a User (or all users in this User Group) to download transcriptions in the Transcription Viewer.

Default Download Format - The default format transcriptions can be downloaded in Transcription Viewer or Preliminary Folder. Users still have an option to change this format before downloading.

Document Type Security – This is used to limit what Document Types can be seen by this User when using the Search All Folder. The Document Type Security Group on the right has been assigned specific Document Types. If you enable the Security Group for this User, they are allowed to view all the Document Types that were defined in each of the Document Type Security Groups. If you don't need to create Security Groups, just leave the Default Group selected.

Maintenance Access

Maintenance Access			
Attribute	Result	Group	User
Maintenance - Client Defaults	✓	✓	<input type="checkbox"/>
Maintenance - Associates	✓	✓	<input type="checkbox"/>
Maintenance - Documents	✓	✓	<input type="checkbox"/>
Maintenance - Users	✓	✓	<input type="checkbox"/>
Maintenance - Templates			<input type="checkbox"/>
Maintenance - Interfaces	✓	✓	<input type="checkbox"/>
Maintenance - ShadowPrint			<input type="checkbox"/>
Maintenance - Groups			<input type="checkbox"/>

Maintenance Client Defaults – Check to allow User to edit the eScription One Client setup. This is a very dangerous feature as it could allow this User to change every Workflow aspect of the eScription One system. Access to the Client setup menus is through the Maintenance link on the Users Home Page.

Maintenance Associates – This allows the User to enter the Maintenance menu (from User's Home page) and turns ON the ability to Open the Associate database, Associate Type (if this feature is turned on in the Client setup), and Patient database. The user can add, edit, and delete Associate and Patient records. Typically, most staff has access to this. Most clinicians don't want access.

Maintenance Documents – This turns ON the User's ability to enter the Document Type and Print Template menu from the Maintenance link on the User's home page. This provides full add, edit, or invalidation capabilities. This feature should not be turned ON except to those who administer the eScription One Client, and then to only those with training.

Maintenance Users – This allows the User to add, edit, and inactivate users of the system. Only Client administrators should be given access to this menu as they can enable any user to access the Client Setup which could adversely affect the entire system.

Maintenance Templates – This allows the user to add and edit document templates and dictation templates. It also gives access to print templates and to change the print templates addresses.

Maintenance Interfaces – This allows the user to setup Interfaces.

Maintenance ShadowPrint – This allows the user to setup ShadowPrint.

Maintenance Groups – This allows the User to setup User Groups and Proxy Groups when the Maintenance-Users role is also checked, Report Groups when Access to Reports is checked, and Location Groups when the Maintenance-Client Defaults is checked.

Restrictions

Attribute	Result	Group	User
Restrict Search All to Location			<input type="checkbox"/>
Restrict Search All to User			<input type="checkbox"/>
Restrict Search All to Loc/Proxy			<input type="checkbox"/>
Restrict Search All to Proxy			<input type="checkbox"/>
Restrict Reports by Location			<input type="checkbox"/>
Restrict Reports by Proxy			<input type="checkbox"/>

Restrict Search All to Location – This will limit search results to locations the user has access to.

Restrict Search All to User – This will restrict search results to transcriptions created by the user.

Restrict Search All to Location/Proxy – Restrict which Transcriptions can be found using the Search All Folder to (1) those having the same location as this User and (2) to those dictated by Users that this user has Proxy rights to. Proxy rights to another user give this user some rights to see or edit the second user's transcriptions. Proxy rights are defined in individual User Profile or in User Groups.

Restrict Search All to Proxy – This will restrict search results to transcriptions with dictators the user has proxy to.

Restrict Reports by Location – This will limit report access to only locations the user has access to.

Restrict Reports by Proxy – This will limit report access to only dictators the user has proxy to.

Print Template Information	
Department Letterhead	<input type="text"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
City/State/Zip	<input type="text"/> <input type="text"/> <input type="text"/>
Phone	<input type="text"/> Fax <input type="text"/>
Letterhead E-Mail	<input type="text"/>
Always Show Graphical Signature	<input type="checkbox"/>

Print Template Information

You are able to fill in the above fields to supply print templates with the needed information to build a letterhead. You would input the appropriate data and submit a print template request stating that you used these fields. Please submit print template requests at esone.support@DeliverHealth.com.

Always Show Graphical Signature – This is what we refer to as a rubber stamp signature. It is applied to the transcription at the time of delivery and is always there. This is however not legal authentication.

Fax Info fields

These fields can be used to construct a custom Fax Cover Page for the User

Sender Name – Customize the sender’s name. 50 Characters maximum.

Facility Description – Customize a description of the sending facility. 50 Characters maximum.

Call-Back Number – Enter a customized call back number.

Cover Page Notes – 1000 characters of customizable notes for the Fax cover page.

Copy Existing User to New User

This command copies all the Group and Individual Settings for an existing User to create the New User. Enter the new User basic information and select Save. Then edit this new User to further customize the settings, if required. Please note that the name, username, and password fields are required.

The screenshot shows a software interface with two main sections. The top section is titled 'Users' and contains a list of users with a search filter for '- dictating' (red) and '- not dictating' (blue). The list includes: Bond, Bond - bond; Craft, Warren - warren; Jenkins, Leroy - leroy; McCoy, Bones - bones (highlighted); McDictator, Billy - bbmcd; Palmisano, Steve - spal; Talker, Martin - mdtalk; Tester, Template - tester; User, New - nuser; and Xerxes, Frank - fixer. Below the list are options for 'Show Inactive Users', 'Add New User', 'Edit McCoy, Bones', 'Copy McCoy, Bones to New User' (highlighted with a red box), and 'Proxy for McCoy, Bones'. To the right is the 'Copy User to' form with fields for Name (First/Middle/Last), Prefix (Dr., Mrs., etc.), Suffix (M.D., etc.), Use Comma, User Name, Password, Dial-In Dictation ID, and Additional Signature Text. The bottom section is titled 'Fax Info Fields' and contains fields for Sender Name, Facility Description, Call-Back Number, and Cover Page Notes.

Proxy

Proxy will give the user access to view, edit, or complete work done by clinicians the user has proxy to. There are four levels of proxy defined below.

Available Proxy Users	Proxy Rights			Edit			Complete			Edit Header Only		
	Result	Group	User	Result	Group	User	Result	Group	User	Result	Group	User
McCoy, Bones (bones)	✓		<input checked="" type="checkbox"/>	✓		<input checked="" type="checkbox"/>	✓		<input checked="" type="checkbox"/>			<input type="checkbox"/>
Administrator, Emdat (ryadmin)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
Craft, Warren (warren)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
Jenkins, Leroy (leroy)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
McDictator, Billy (bbmcd)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
Palmisano, Steve (spal)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
Talker, Martin (mdtalk)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
Tester, Template (tester)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
User, New (nuser)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>

Proxy Rights – Will allow the user to view transcriptions for the selected clinician.

Edit – Will allow the user to edit transcriptions for the selected clinician while in the clinicians preliminary folder.

Complete – Will allow the user to complete transcriptions from the selected clinicians preliminary folder. Please note if the clinician uses an electronic graphical signature, it will not be applied unless completed by the dictator of that transcription.

Edit Header Only – Will allow the user to edit only the demographics portion of the transcription while in the selected clinicians preliminary folder.

Select the clinicians and level of proxy to be given and click save.

Location Access

Available Locations	Location-based Access			Proxy-based Access		
	Result	Group	User	Result	Group	User
Admin Office	✓	✓	<input type="checkbox"/>	✓	✓	<input type="checkbox"/>
Madison, East	✗	✓	<input checked="" type="checkbox"/>	✓	✓	<input type="checkbox"/>
Madison, West	✓	✓	<input type="checkbox"/>	✓	✓	<input type="checkbox"/>

Users can be granted access to which transcriptions they can see in the various Workflow Folders. If Workflow Folders are Location based (defined in Client Defaults > Workflow Options), then Users are normally limited to see transcriptions from the same Location that is defined in their User Setup > Default Location. (That is, the Location field in the transcription demographics and the Default Location for the User are the same.)


Users can be assigned a "Location Group for Location-based Access" in their User Setup. The Location Group (defined in Groups > Location Groups > Location Folder Location Groups) define the additional Locations for which they are being granted additional access. You can override the Location-based Access here with individual User settings.

If Workflow Folders are Proxy-based, then Users are normally limited to see only the transcriptions of the dictators they have been granted Proxy to, irrespective of the Location assigned to the transcription. You can further restrict the User to see transcriptions to only certain locations for this Proxy group. The Location Group for Proxy-based Access is defined in Groups > Location Groups > Proxy Folder Location Groups and Users are assigned the Location Group in their User Setup. You can override the Proxy-based Access Group with individual setting here.

These settings are for very advanced (and usually very large) Clients who require customized Access. Typically, Location-based and Proxy-based Access is not simultaneously used. However, since the Location or Proxy setting for each Workflow Folder is independent, both these Location-based and Proxy-based Access could be used.

Select the locations the user will need access to and click save.

InVision Reports

 Management Reports for Admin, Sally


InVision Reports for Bones McCoy
This is a listing of the reports that the current user has access to.

- + Production Reports
- + Workflow Reports
- + User Reports
- + Miscellaneous Reports
- + ShadowScribe Reports
- + Performance Reports

When a user has been given the access right "Access to Mgmt Reports" in the access rights section of their user setup they will have access to the InVision tab in InQuery.


Select from the list of which reports the user will need access to and click save. Only the selected reports will be available in the InVision tab.


Edit Locations

 Edit Locations for Admin, Sally

Locations for Sally Admin

Admin Office
 Madison, East
 Madison, West

 Edit Code for Location

 Remove Code for Location

The codes for this section are used by our interfaces and print templates department.

Auto Copy Associates




This allows associates to be automatically copied on all transcriptions from the user. The associate must be defined in the Associate database and their Preferred Delivery Method selected.

One typical use is to create a "Medical Record" User and Associate. When this user's transcription is electronically signed, it is "copied" to the User "Medical Records" referral folder.

A second use may be that all reports for this dictator are faxed to their home office for filing. To accomplish this, the "Home Office" associate is created with a fax number, the "Auto-fax, preferred delivery method selected, and this Users setting include "Autofax". When the dictator signs the report, it is automatically faxed to their home location fax number.

To add a user as an auto copy associate search for the correct associate name, select the appropriate associate from the list of available associates. Then Click add to make that associate an auto copy associate.

Additional Signatures

 Additional Signatures for Admin, Sally


Required Additional Authenticators for Sally Admin ?

Signing Users		Available Users
	<div style="display: flex; justify-content: center; gap: 10px;"> ← add remove → </div> <div style="display: flex; justify-content: center; margin-top: 10px;"> remove all → </div>	<div style="background-color: #e0e0e0; padding: 2px;">Doe , John - jdoe</div> <div>Jénkins , Léroy - ljénkins</div> <div>Master , Administrative - admin</div> <div>O'Malley , John - jomalley</div> <div>test , test - test</div> <div>test2 , test2 - test2</div> <div>Therapist , John - jtherap</div> <div>Therapist , Steven - stherapi</div>

This allows additional authenticators to automatically be added to dictations created by this user. Transcriptions will automatically be routed to these authenticators for transcription content approval.


Please note to require an additional signature it must be selected in the users dictating clinician option, as well as selected in the document type.

Upload Signatures

 Upload Signature Images for Admin, Sally

Upload Images for User

Enter the filepath of the image you wish to upload. 500Kb maximum allowed.

Non-VML Signature File (JPG)	<input type="text"/>	Browse...	 upload
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Preparing and Uploading Instructions:

- Sign signature on plain white paper the same size it should appear on Transcription.
- Scan signature at recommended 200 dpi. (dots per inch)
- Crop image to where only the Signature appears.
- Please allow up to five minutes for the signature to become available.

Electronic Graphical signatures may be added to a user by following the above steps, browsing to the location the signature image is stored and clicking upload. However, signatures are typically added by submitting a completed <https://www.escription-one.com/Software/Forms> and emailing it to esone.support@DeliverHealth.com.

Dictation Templates and Editing

Dictation Templates are similar to Document Templates except that they are not associated with any particular Document Type or Location. Dictation templates are pre-typed sections of text that the clinician will dictate when to insert into a transcription. They are also sometimes called “Normals” and can be inserted at any time into any document.

 Edit Dictation Templates for Doe, John

Selection Criteria

Users Show Inactive Users

Dictation Templates

eye
elbow
Color Test
Center Test

- ShadowScribe templates

- Add New Template
- Add New ShadowScribe Template
- Edit Template
- Copy Template
- Delete Template

Add/Edit: Specialist, Spencer - f...

Selection Criteria
Users: Show inactive

Dictation Templates
cha
test

- ShadowScribe templates

- Add New Template
- Add New ShadowScribe Template
- Edit Template
- Copy Template
- Delete Template

Times New Roman 3 (12pt) Normal

This is a test [right:leftname(side)]. [Right:leftname(side)] is a test.

Copy test

Qualified Text will appear in Yellow. Mark with "QT" button on toolbar.

Dictation Code Notes

Location

Document

Template for All Users Attestation Template Allow MT to Dismiss this Note

last modified by djin on 6/20/13 11:07 AM

Simply click add, edit, copy, or delete and make the changes desired. Then add a dictation code, or name for this template and click save.

This can also be made into an attestation template by checking the attestation template option. An Attestation Template is a special kind of an append that is used when an additional person signs the transcription, usually someone of a higher authority. This append usually acts as a legal disclaimer for the additional signer, stating the signer has reviewed the transcription and agrees with what the original signer dictated. This scenario is common in teaching hospitals where a Resident needs an Attending physician to sign off on their transcription before it becomes a legal document.

Enabling Users for ShadowScribe

ShadowScribe ASR voice recognition users are enabled under their specific user profile. The client must be enrolled in ShadowScribe ASR voice recognition for the following settings to be available.

User Information	
User Telephone "InTouch" Dictation ID	185563
Name (First/Middle/Last)	James Doc *
Prefix (Dr., Mrs., etc.)	Dr. Suffix (M.D., etc.) James
Use Comma	<input type="checkbox"/> copy to associate
User Name	jdoc *
Password	<input type="password"/> generate temporary password
Department	<input type="text"/>
Title	<input type="text"/>
Specialty	<input type="text"/>
Nuance Specialty	Cardiology <input type="text"/>
Disable Nuance Draft Generation	<input type="checkbox"/>

DeliverHealth Specialty – Selecting a specialty from the drop-down enables the user for ASR voice recognition. The specialty allows the system to use a specific set of vocabulary when initially building the speech model for the user.

If you do not want a user to be on the ASR voice recognition system, then do not select a specialty. Not having a Specialty disables the user from voice recognition.

Disable DeliverHealth Draft Generation – This will prevent drafts from going to MT editors but still keep jobs going back to the ASR voice recognition system for learning. This is used in cases where draft quality for the specific user may be suboptimal and you want to give the system more time to try to improve the quality.

Link to User of Referring Client

eScription One can setup two Clients (Hospital, Clinic, or other facility) to send referral notes to each other. If that is done, it will also open the possibility that user's at one facility can search for documents at the second facility. To allow this select this option:



Add New Link – Select to add a link to another client and allow the selected user to view the documents of another user at another client.

Delete Selected Link – Select to remove the relationship between two users at different clients.

Link Administrator, Emdat To Following Users

From the Search All folder, this allows Administrator, Emdat to view documents for users of the referring clients.

DEMORAJ - Master, Administrative

+ Add New Link
× Delete Selected Link

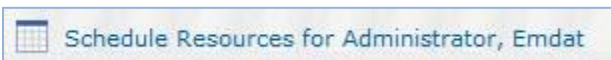
Allow Administrator, Emdat to see documents for:

Client	DEMORAJ ▼
User	Master, Administrative ▼

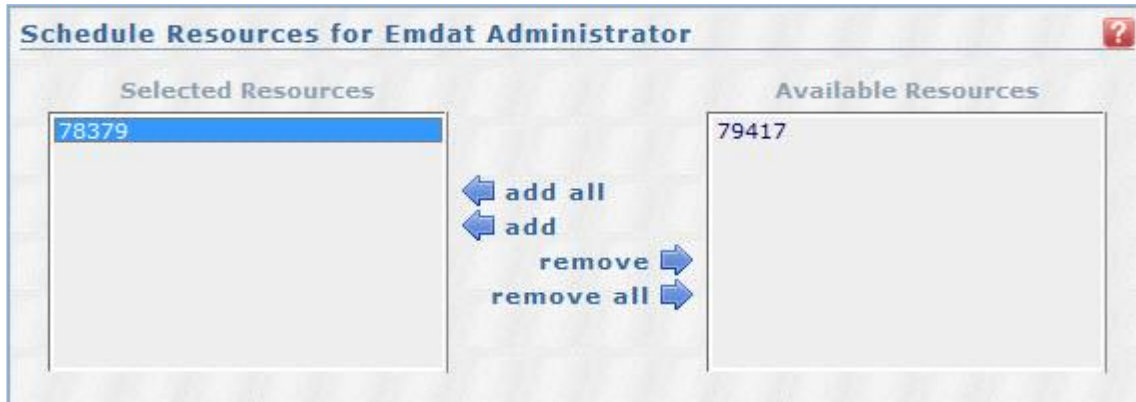
Once the link has been setup documents from the other client can be searched for and found using the Search All.

Schedule Resources for User

Schedule Resources are used to link Patient Appointments to Clinicians. This allows Dictating Users to search for appointments on their Android or iPhone mobile devices.



On the right hand there are two Columns. “Selected Resources” have been assigned to the User and “Available Resources” are resource IDs that have been uploaded to the Patient Database, but have not been assigned to this user. Available Resources could be assigned to other users.



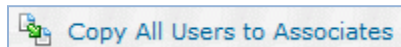
Add All – Add all available resources to the selected user.

Add – Add the selected resource to the user.

Remove – Remove the selected resource from the user.

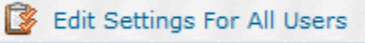
Remove All – Remove all resources from the user, and add them back to the Available Resources pool.

Copy All Users To Associates



This will add all users for this client as associates for this client. You can select to add either all users or dictating users.

Edit Settings For all Users

 Edit Settings For All Users

All Users Settings ⊕ expand all ⊖ collapse all

- + Dictating Clinician Options
- + Folder Access
- + Access Rights
- + Maintenance Access
- + Restrictions
- + Production Reports
- + Workflow Reports
- + User Reports
- + Miscellaneous Reports

In this section you are able to change user settings for all users for the client. Select the setting you would like to change and then select the users you would like to apply that setting to and click save.

Locked Users


 Locked Users

This link will allow you to see all users whose accounts have been locked from log-in due to entering the incorrect password.

Select the name and press the Unlock Selected User button to allow the transcriptionists the ability to log in.

Locked Users

Doe, John - jdoe

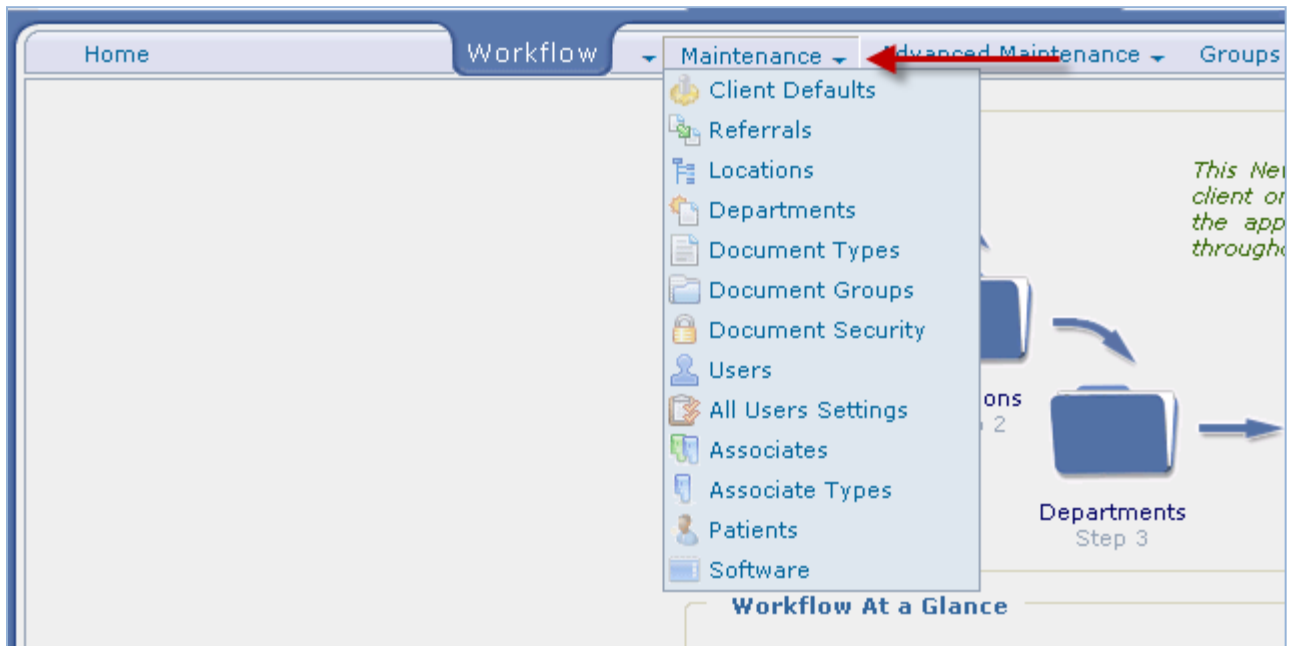
 Unlock Selected User

User Inventory Report



Clicking this link will prompt you to open or save an Excel Document named UserInventoryReport.xls. This report includes all setup information for Users, including their access rights, pools, and the group settings.

Maintenance




Client Defaults


Client defaults are reviewed in detail in [Error! Reference source not found.](#)

Referrals

Cross Client Referrals

Darryl's Demo (DemoDar)
Mikes Test Client (miketestclient)
Ryan's Demo Transcriptions (rydemo)

 Grant Cross Client Referral Access

 Remove Cross Client Referral Access

- When using eScript One InQuiry as the method of delivery, cross client referrals can be used to send referrals to a user at another facility.
- Click Grant Cross Client Referral Access and type in the client code of the facility which you wish to route CCs to then press Save.

Add Referral Relationship

Grant Access to Client

Enter the Client Code of the Medical Facility you wish to Automatically Route CC'ed Transcriptions

Locations

- Locations are reviewed in detail in [Locations](#).

Departments

- Departments are reviewed in detail in [Departments](#).

Document Types

- Document types are reviewed in detail in [Document Types](#).


Document Groups


Document Groups


Letters

Notes

Summaries

 Add New Document Group

 Edit Letters

 Delete Letters

To add a new document group click add new document group.

Document groups allow you to group transcriptions in the InQuiry workflow folders for easier access to certain types of reports.

Document Group ID– Assign the document group a number for it to be identified by.

Name– Enter the name you would like to give this group.

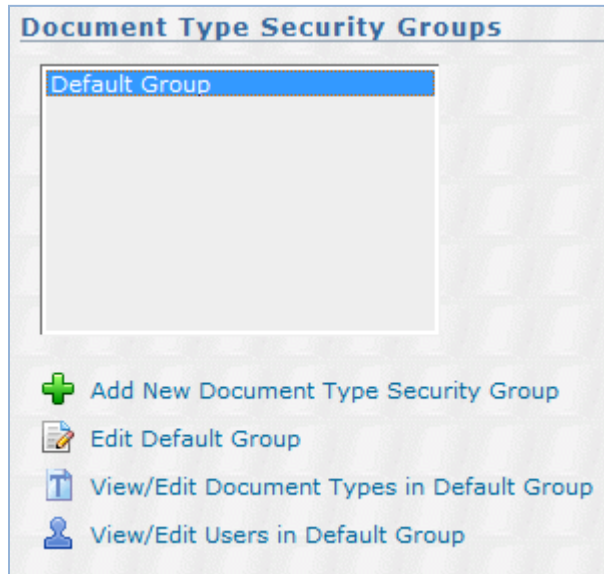
Edit Letters Document Group

Document Group ID	3 ▼
Name	Letters
Foreground Color	<input type="text"/> <input type="checkbox"/> use default
Background Color	<input type="text"/> <input type="checkbox"/> use default

Foreground color– Color in which documents will appear on the screen.

Background Color– Color in which documents will appear on the screen.

Document Security



This is only used if you need to limit User access to specific types of documents. Document Type Security allows you to limit which Document Types can be seen by a User when using the Search All Folder. This is accomplished by assigning Document Types to Security Groups and enabling the Security Group to the User. A User who has been enabled to one or more Security Groups can only find Document Types that are defined in those Security Group(s) when using the Search All Folder. If you turn ON the "User Security In Workflow" option (in Maintenance > Client Defaults > Workflow Settings), you extend these Security Group settings to the Document Types in the Workflow folders.

Add or Edit A Document Security Group




Group ID– The system generated ID number assigned to this group.

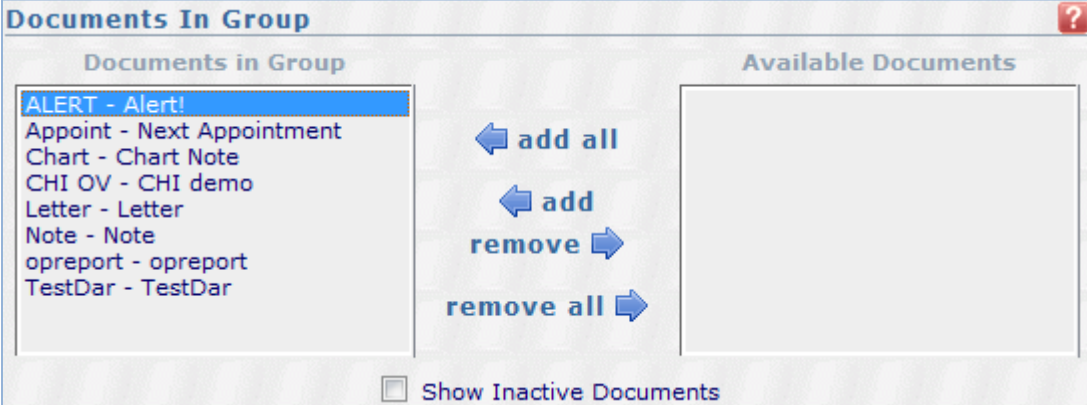
Edit Default Group Security Group	
Group ID	1
Group Name	<input type="text" value="Default Group"/>

Group Name– Give this group a name.

View/Edit Document Types in Group


 [View/Edit Document Types in Default Group](#)

Add Document Types to this Document Type Security Group by moving them into the left box ("Documents in Group"). A Document Type may be assigned to more than one Security Group. If you only have one Security Group, leave all your

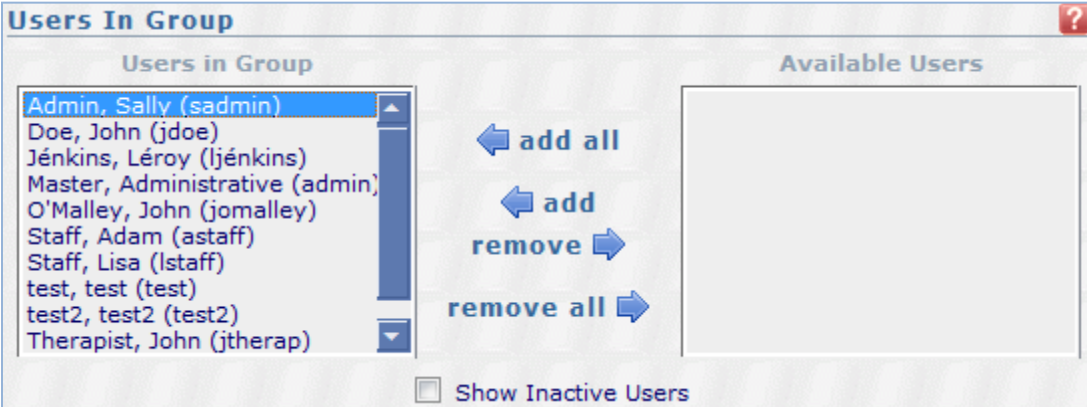


Document Types in the left box.

View/Edit Users in Group

 [View/Edit Users in Default Group](#)

Allow users to see the Document Types from the selected Security Group (in the left pane) by moving the User into the



left box ("Users in Group").

Remember, Users are assigned to Security Groups, which in turn define which Document Types the user may view. If you have only one Security Group (the "Default Group"), leave all your users in the left box.

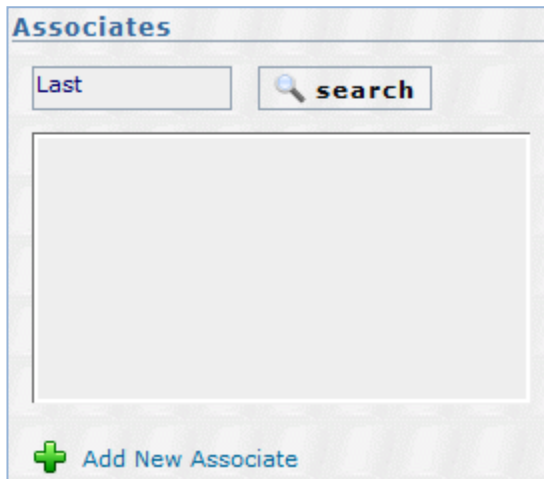
Users

Users are reviewed in detail in [Users](#).

All User Settings

All user settings are reviewed in detail in [Edit Settings For all Users](#).

Associates



Associates are used to populate a database of all people who could be carbon copied on a transcription (including referring physicians). The 1st field (Associate Code) is a unique number that can be assigned to an Associate. If you do not have a unique number for each associate, please leave this field blank and one will be automatically generated for you.

To make changes to the associate database simply search for all or part of an associate's name. A percentage sign, %, can be used as a wild card.

Once you have found the correct associate click edit or delete depending on what you would like to do.

If you click Edit the following screen will appear.



Associate Information

Edit Admin, Sally Associate	
Associate Information ?	
Internal Code	2902538
Associate Code	<input type="text" value="U66956"/>
Name (First/Middle/Last)	<input type="text" value="Sally"/> <input type="text" value="J"/> <input type="text" value="Admin"/>
Prefix (Dr., Mrs., etc.)	<input type="text" value="Miss"/> Suffix (M.D., etc.) <input type="text"/>
Business Name	<input type="text"/>
Specialty	<input type="text"/>
Greeting (Dr. Smith)	<input type="text"/>
Address	<input type="text"/>

Internal Code – This code is generated by the system as a unique identifier for this associate.

Associate Code – System will automatically generate an associate code if this is left blank. This code is the code used in the client's system to identify this referring clinician or associate. By filling in this code with what the client uses, eScription One will be able to send this code back (if a transcription interface is used) to the client to identify who has been copied on each transcription.

There are several self-explanatory name fields fill these out as needed.

Greeting – This is an important field. When transcriptions are created Letters will always start “Dear” followed by whatever is put in this field. For example it could be either Dear John, or Dear Dr. Doe.

There are several address fields, fill these out as needed.

Phone – Input the associates phone number as you would like it to appear. For example (555)555-5555 or 555-555-5555.

Fax – Input the associates fax number in this field. This is required if the user will be receiving referrals via Autofax.

Email – Input the associates email address here.

Method of Delivery

Method of Delivery	
Mail	<input type="checkbox"/>
AutoFax	<input checked="" type="checkbox"/>
Emdat InQuery	<input type="checkbox"/>
Referral User	<input type="text"/> Referral From <input type="text" value="Local Client"/>

Method of Delivery will determine how eScription One will deliver to the associate a copy of a transcription. If this associate is copied on a transcription, the delivery method(s) below will be used to deliver the transcription. You can select more than one delivery method.

If you check Auto-Fax or eScription One InQuery, the Mail option will be disabled. If nothing is checked, Mail is the default method of delivery.

Mail – By default, this option is selected as the delivery method. This option may be checked by itself or in addition to Auto-Fax and Referral Folder.

Auto-Fax – By checking this option, each time this associate is copied on a transcription, a fax will be sent to the fax number above, once the transcription has been processed (processed is defined by the client).

eScription One InQuery – When checking this option, you are required to link this associate record to a valid eScription One User (see list of Referral Users below). The eScription One User will see a copy of the transcription in their Referral Folder. If Cross Client Referrals are used, you may select the appropriate eScription One Client from the "Referral From" field and the list of valid users will be displayed.

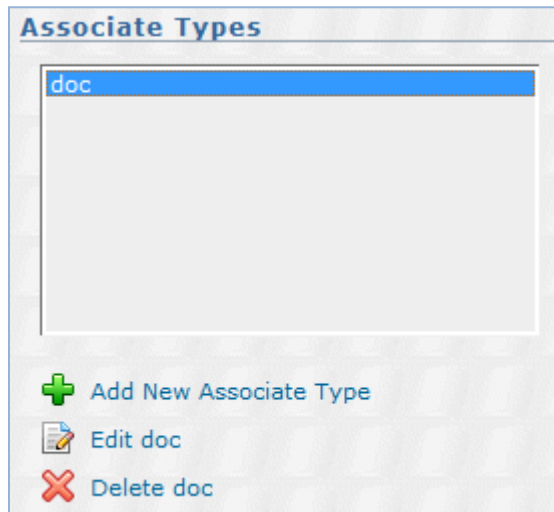
Referral User – Please select the valid eScription One User from the drop-down list. By default, the local client's users will be displayed. If Cross Client Referrals is turned on for this client, then please select the correct client from the REFERRAL FROM drop-down list.

eScription One Lite Delivery

Emdat Lite Delivery	
Export Type	<input type="text" value="None"/>
Username	<input type="text"/>
Password	<input type="text"/>

eScription One Lite is an alternative method of delivery for associates in Australia. It is not used outside of Australia.

Associate Types



Associate Types allow you another way to incorporate associates into the final transcription with the use of Print Templates. As an example, a Radiologist wants the name of the Ordering Physician (always defined on every report) and Primary Care Physician (sometimes defined on the report) at the top of the report. We create Associate Types named "Ordering Phys" and another called "Primary Phys".

During dictation, the radiologist says "The ordering physician is Dr. John Doe and the PCP is Dr. Mary Smith."

While transcribing, the MT looks up 'Doe' in the Associate database and selects 'John Doe'. The MT opens the Associate record (double clicks the name in the carbon copy box) and checks the checkbox next to "Ordering Phys" (bottom right in the Associate window). The MT similarly looks up Mary Smith and checks the "Primary Phys" checkbox in her Associate Record. (While these new checkboxes show up in the Associate window, the information is not saved with the Associate record; it is saved with the transcription.)

The Print Template was designed to use this Associate Type information. At the top it prints "Ordering Physician: " and then prints the names of all associates in that transcription with an Associate type of "Ordering Phys". On the next line it prints "Primary Care Physician: " and then the name of the Associate attached to that transcription with an Associate Type of "Primary Phys". If there is no Primary Phys, no line is printed.

If you plan to use this feature, please provide detailed examples to the Print Template Group by submitting a ticket at esone.support@DeliverHealth.com. The eScription One Implementation area or Help Desk will be pleased to help you through the process of determining how this may be set up for your client.

Patients

To find a patient in the patient database search for all or part of a patient's name; a percent sign, %, can be used as a wild card.

This menu provides access into the Patient database. Patient information in this DB is available to the Medical Transcriptionist during transcription. When the MT selects the patient record, they get the exact spelling of the patient's name, date of birth, medical record number, etc. This greatly reduces the most common transcription errors that are caused when the patient information isn't available to the MT.

This database may also be used to address letters to patients. To create letters to patients, you would create a unique document type with the "Generate Patient Envelope" option selected, which uses this database to address the letter and envelope.

The information in this Patient database is typically only saved for 30 days. You can add or edit patient information here as well add and edit patient appointment information. However, that would be very cumbersome to do by hand in most practices.

eScription One has options to automatically populate this database.

- Many large clients have systems that produce ADT feeds. ADT stands for Admission, Discharge, and Transfer and is the language used to communicate Inpatient and Clinic appointment and registration information between computer systems. eScription One can accept a client's ADT feed to populate this database.
- Many small and most medium sized clients have scheduling systems. If it can produce a report schedule that is saved on the PC, eScription One can use the InSync product to move the schedule to the Server, parse the report to extract the patient information, and populate this database.


Please call eScription One to work with your client to help determine the best way to obtain this information and setup the appropriate method.

Edit/Add a Patient

Edit HURT, John Patient	
MRN	111111
Name (First/Middle/Last)	John Q HURT
Name	HURT, John
Gender	M DOB 5/6/1972
Location	Madison, West
Appt Date	6/30/2008
Address Line 1	125 Ouch Ave

If you click on add or edit a patient you are taken to the above screen. Please enter any applicable information in the appropriate fields. If the client uploads a patient schedule to eScription One there should already be information in these fields.

View Appointments for Patient

 View Appointments for HURT, John

Patient's Appointments

3/17/2011

5/23/2011 (231)

5/30/2011 (13)

+ Add New Appointment

≡ Edit Selected Appointment

✗ Delete Selected Appointment

In this section you can view, add, edit, or delete an appointment for the patient.

Physician – This text field is meant to be informative to the transcriptionist to allow her to pick the appropriate appointment from a list. It does not link to a specific clinician in the system and can be used as an Appointment

Add Appointment	
Physician	Ordering Phys
Location	All Locations ▼
Appt Date	12/10/2012  *
Exam #	Exam #123 
Resource ID (formerly Dictation ID)	123
Insurance Co	
Group ID	
Acct ID	
Employer	
Contact #	

Description.

Location – The location that should populate into the TID's demographics when this appointment is selected.

Appointment Date – The appointment date of this appointment.

Order Number – The order number of this appointment. This is a searchable field in the Search All tab of InQuery.

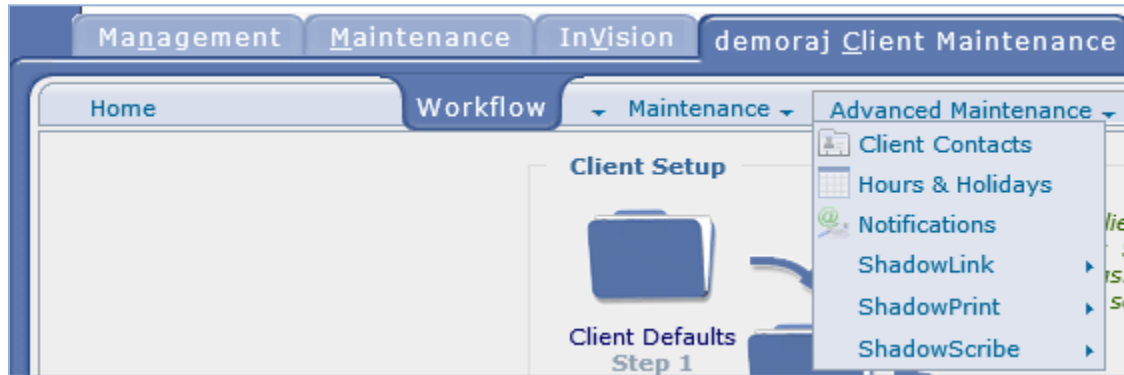
Resource ID (formerly Dictation ID) – This is a code that links the appointment to a clinician. A clinician that has the same Resource ID or Dictation ID as is entered here will have this appointment show in their Dictator Appointment Listing.

User Fields 1-5 – These are user fields that will automatically populate the demographic fields with this appointment is selected.

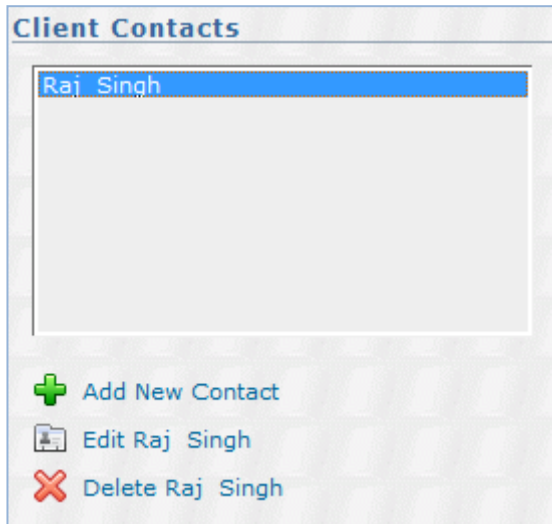
Software

Selecting software from the maintenance menu will re-direct you to eScription One's software page. This can also be found by going to <https://www.escription-one.com/software>.

Advanced Maintenance



Client Contacts



This provides a convenient place to store client contact information. It is very important to eScription One. When the Help Desk is asked to assist and exact contact information not provided, this is where they look for that contact information in order to communicate with the client.

Hours and Holidays

Hours and Holidays [help ?](#)

Set the hours for which turnaround time is based, as well as hours for holidays that the client observes

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

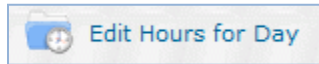
[Edit Hours for Day](#)

[Add New Holiday](#)


TAT (turnaround time) is the total amount of time accumulated from when a dictation is received to when a transcription is delivered to InQuery. TAT is typically agreed upon by the transcription company and the client. The Hours & Holidays screen is used to specify what hours of the day are included in TAT according to the client's workflow specifications. By default, the eScription One system is set to calculate TAT on a 24 hour day. If you wish to have more control over the TAT you can use the Hours & Holidays screen to do this. Below is a description of each part of the screen.


Edit Hours for Monday			
Time	<input type="checkbox"/> TAT	<input type="checkbox"/> Start TAT	
Midnight - 1:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	
1:00 AM - 2:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	
2:00 AM - 3:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	
3:00 AM - 4:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	
4:00 AM - 5:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	
5:00 AM - 6:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	
6:00 AM - 7:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
7:00 AM - 8:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
8:00 AM - 9:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
9:00 AM - 10:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Edit Hours for Day – Clicking on this link will display the TAT time settings for the day. This is the time grid you see on the right of the screen. There are 3 columns in the time grid: Time, TAT, and Start TAT (described below).



Time – This column lists all the hours (in 24 hour format) in a 24 hour day.

TAT – This column is used to specify which hours of the day you wish to count towards TAT. To include the hour, simply check the checkbox associated with that hour. To select all hours, click on the  select all icon located at the top of the column.

Start TAT – This column lists the range of hours to start calculating TAT. In this column, the hours you check will determine what hours the eScription One system will start calculating TAT. To select all hours, click on the  select all icon located at the top of the column.

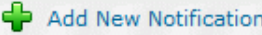
Add new Holiday – Clicking on this link will allow you to add holidays to your work schedule. If a dictation falls within the holiday, then the holiday TAT will override the regular day TAT.



Notifications


Notifications

The following is a list of e-mail addresses that will be notified when certain events occur within the system



Notifications – Is a list of e-mail addresses that will be notified when certain events occur within the system.

Add Notification ?

E-Mail Address	<input style="width: 90%;" type="text"/>
Event	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; background-color: #4a86e8; color: white;">Associate Upload</div> ▼
Hold Until Date	<input style="width: 80%;" type="text"/> 

E-Mail Address – This email address will be sent notifications when selected events occur.

Event – This is a drop-down menu of different events to select to receive notification emails.

Hold Until Date – If you would like the notification to be temporarily held, select an end date here.

ShadowLink – Inbound Interfaces

This section is used for uploading patient and associate files. Only used for custom formats. If there is an existing interface set up be very careful when changing any settings.

Name – The name you would like to give this interface.

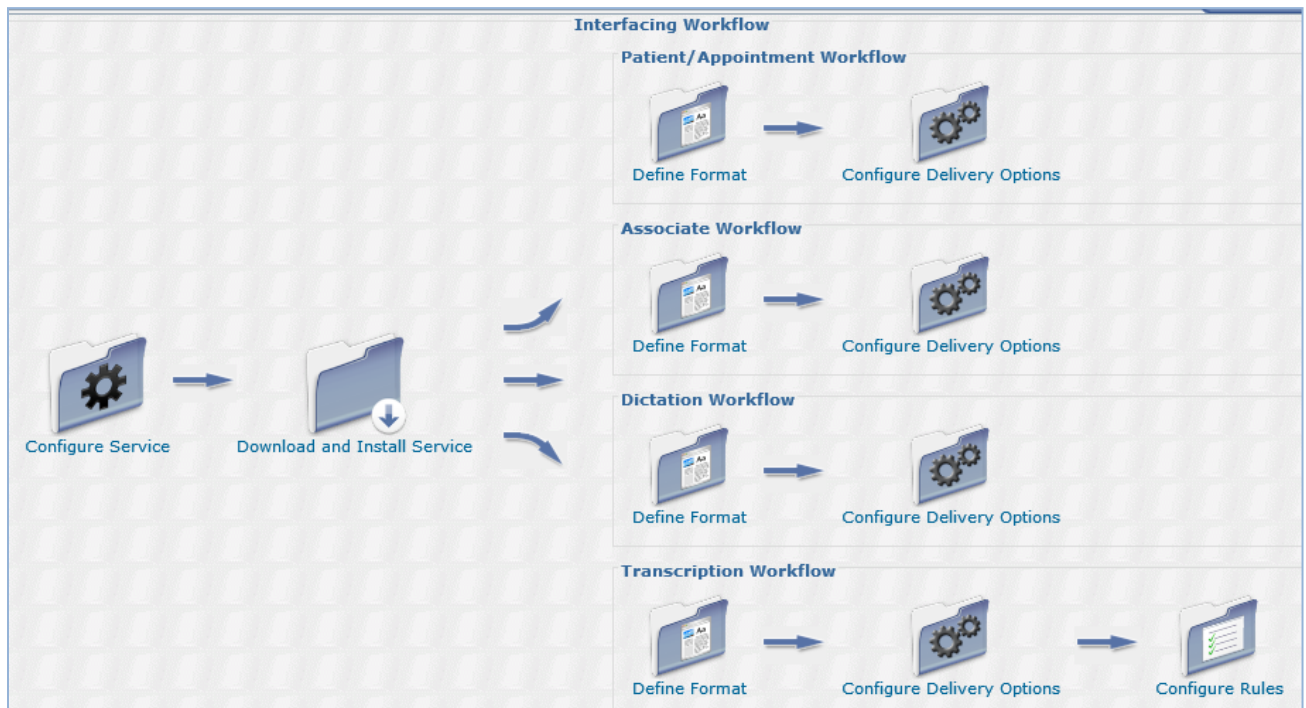
Description – A more detailed description for this interface.

Data Type – This can be either associate or patient, depending on the type of upload you would like to make.

Format – This can be either fixed width, delimited, or custom.

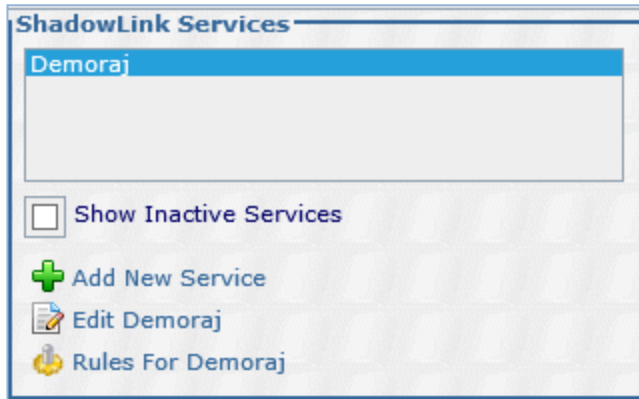
Delimiters – If using the delimited format, enter the delimiter used here.

ShadowLink – Workflow



This is a graphical representation of the workflow to setup ShadowLink for a client.

ShadowLink – Services



ShadowLink Services

Demoraj

Show Inactive Services

+ Add New Service

✎ Edit Demoraj

⚙ Rules For Demoraj

ShadowLink service accounts are created to log into ShadowLink. This allows eScription One servers to make a connection to the remote computer to import and/or export files to/from that computer.

In this section you can Add or Edit a service as well as see the rules for the service selected.

Edit Service

Edit Demoraj Service Account	
Name	Demoraj *
Description	
Active	<input checked="" type="checkbox"/>
Login	demoraj *
Password *
Notification Email Address	fake@emdat.com *
IP Address	172.21.1.157
Local Workstation Name	RAJ8

The fields with red asterisks (*) are required when adding or editing a service.

Name – A unique name for the machine running the ShadowLink Service. This name will be displayed on subsequent screens to identify this service. (50 chars max).

Description – A descriptive summary of purpose and operation of the service for your reference (500 chars max).

Active – On/Off switch for the service. Services are never deleted; only Inactivated.

Login – Assign a unique Login ID to the service. When the ShadowLink software is installed at the client site, this Login ID and Password must be used to configure the software. This requires that each machine at the client site must have a unique Service established with its own unique Login and Password.

Note: Service logins must be unique between ShadowLink and ShadowPrint within a client.

Password – This is the password that, in addition to Login and Client Name, will be used as credentials to log ShadowLink in on the remote computer.

Notification Email Address –Emails will be sent to this address when certain error conditions exist in the ShadowLink Service. Use a semi-colon to specify multiple e-mail addresses in this field.

IP Address – The IP address of the machine currently running the ShadowLink Service. For information purposes only.

Local Workstation Name – When the ShadowLink service is configured using the unique Login ID and Password, the service stores the local workstation name. This is to ensure that the service cannot be run on a second machine.



To move the service, you must click the 'Clear' button in the local workstation name of the service to be moved.

Note: IP Address and Local Workstation Name only populate after the service is logged in on the remote PC.

Delivery Methods for Service

The screenshot shows a window titled "Delivery Methods For Demoraj". It contains four sections, each with a list of delivery methods and three action buttons (Add, Edit, Delete):

- Patient/Appointment Delivery:** Temp
- Associate Delivery:** (Empty list)
- Dictation Delivery:** Dropbox
- Transcription Delivery:** Tran Delivery to Folder

In this section you can Add, Edit or Delete the delivery method for the service currently selected. These are the file paths where the various types of data are imported from or exported to on the remote PC.

Edit Patient Delivery Method

Edit Temp Patient Delivery Method	
Name	Temp *
Description	
Active	<input checked="" type="checkbox"/>
Source	Folder ▼
Path	C:\Emdat test\ *
Save Path	C:\Emdat test\SAVE\
File Mask	
Default Format	Temp CSV ▼ *

Name – A unique name for the delivery method of the selected ShadowLink service (50 chars max).

Description – A general description of the delivery method for your reference (500 chars max).

Active – On/Off switch for the delivery method. Delivery Methods are never deleted; only InActivated.

Source – Drop-down menu with options for Folder, TCP Server and Custom. If TCP Server or Custom will be used, please submit a ticket to the interfaces department for assistance with setup: esone.support@DeliverHealth.com.

Path – Name of local folder or UNC path to pull the patient file from.

Save Path – Name of local folder or UNC path to save a copy of the patient file after import. This is optional.

File Mask – Filter to limit the file that is uploaded to only those of a certain name or type.

Default Format – This is the format for the patient file as specified in Advanced Maintenance > ShadowLink > Patient/Appointment Formats.

Edit Associate Delivery Method

Edit Associate Upload Associate Delivery Method	
Name	Associate Upload *
Description	
Active	<input checked="" type="checkbox"/>
Format	Temp ▾
Path	c:\emdat\associate
Save Path	
File Mask	*.*

Name – A unique name for the delivery method of the selected ShadowLink service (50 chars max).

Description – A general description of the delivery method for your reference (500 chars max).

Active – On/Off switch for the delivery method. Delivery Methods are never deleted; only InActivated.

Format – This is the format for the associate file as specified in Advanced Maintenance > ShadowLink > Associate Formats

Path – Name of local folder or UNC path to pull the associate file from.

Save Path – Name of local folder or UNC path to save a copy of the associate file after import. This is optional.

File Mask – Filter to limit the file that is uploaded to only those of a certain name or type.

Edit Dictation Delivery Method

Edit Dropbox Dictation Delivery Method	
Name	Dropbox *
Description	
Active	<input checked="" type="checkbox"/>
Format	dropbox ▾
Include Subfolders	<input type="checkbox"/>
Audio File Path	C:\Users\Public\Desktop\records *
Audio File Mask	*.* *
Header File Path	
Header File Mask	
Save Path	
Save Sent Dictations for	Always ▾
Reconcile Path	

Name – A unique name for the delivery method of the selected ShadowLink service (50 chars max).

Description – A general description of the delivery method for your reference (500 chars max).

Active – On/Off switch for the delivery method. Delivery Methods are never deleted; only InActivated.

Format – This is the format for the associate file as specified in Advanced Maintenance > ShadowLink > Dictation Formats

Include Subfolders – Checkbox which determines if subfolders will be included in the upload of the path specified.

Audio File Path – Name of local folder or UNC path to pull the dictation audio file from.

Audio File Mask – Filter to limit the audio file that is uploaded to only those of a certain name or type.

Header File Path – Name of local folder or UNC path to pull the dictation header file from.

Header File Mask – Filter to limit the header file that is uploaded to only those of a certain name or type.

Save Path – Name of local folder or UNC path to save a copy of the dictation file after import. This is optional.

Save Sent Dictations for – Pull down menu which allows you to limit how long dictations are saved in the Save path in number of days.

Reconcile Path – Name of local folder or UNC path to send a confirmation reconcile file to for certain dictation sources.

Edit Transcription Delivery Method

Edit Tran Delivery to Folder Transcription Delivery Method	
Name	Tran Delivery to Folder *
Description	
Active	<input checked="" type="checkbox"/>
Source	Folder ▾
Path	C:\Emdat\TIDs *

Name – A unique name for the delivery method of the selected ShadowLink service (50 chars max).

Description – A general description of the delivery method for your reference (500 chars max).

Active – On/Off switch for the delivery method. Delivery Methods are never deleted; only InActivated.

Source – Drop-down menu with options for Folder, TCP Server and Custom. If TCP Server or Custom will be used, please submit a ticket to the interfaces department for assistance with setup: esone.support@DeliverHealth.com.


Path – Name of local folder or UNC path to send the Transcription file to.


ShadowLink – Patient/Appointment Formats


Patient/Appointment Formats


Temp CSV

Show Inactive Formats

 Add New Format

 Edit Temp CSV

 Copy Temp CSV

 Show ShadowLink Workflow

Patient formats are used to parse the patient files received from the remote computer by ShadowLink into the Patient database of the client. Use this section to Add, Edit, or Copy patient formats.

Format Information

Edit Temp CSV	
Format Information	
Name	Temp CSV *
Description	
Is Active	<input checked="" type="checkbox"/>
Format Type	Delimited ▾








Name – Assign a unique name for this format. This name will be displayed on subsequent screens to identify this format (50 chars max).

Description – Enter a descriptive summary of the purpose and specification of this format for your reference (500 chars max).

Is Active – Enable/Disable the format. Formats are never deleted; only inactivated.

Format Type – Select the general type of message that will be parsed by this format. Options are Custom, Delimited, Fixed Width, HL7.

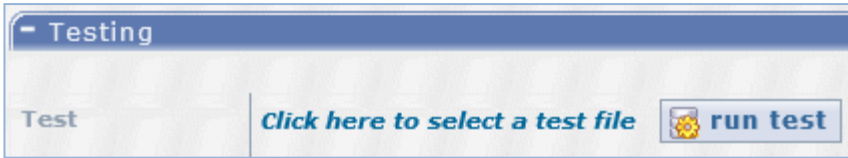
Configure Format

Configure Delimited Format										
Load from Template										
Field Delimiter	Comma ▾									
Fields	<table border="1"> <thead> <tr> <th>Action</th> <th>Field</th> <th>Position</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;">No Fields have been defined.</td> </tr> <tr> <td colspan="3" style="text-align: center;">  Add Patient  Add Associate </td> </tr> </tbody> </table>	Action	Field	Position	No Fields have been defined.			 Add Patient  Add Associate		
Action	Field	Position								
No Fields have been defined.										
 Add Patient  Add Associate										

Load from Template – Use this button to load a pre-configured format of the type selected above in Format Type. If a suitable option is not available, use the options below to customize a format.

It is recommended to submit a ticket to the interfaces department if custom setup is needed for the remainder of the options in this section: esone.support@DeliverHealth.com.

Testing



Test – Use the Run Test button to test the configured options against a local patient file.

ShadowLink – Associate Formats

Associate formats are used to parse the associate files received from the remote computer by ShadowLink into the associate database of the client. Use this section to Add, Edit, or Copy associate formats.

Format Information














Name – Assign a unique name for this format. This name will be displayed on subsequent screens to identify this format (50 chars max).

Description – Enter a descriptive summary of the purpose and specification of this format for your reference (500 chars max).

Is Active – Enable/Disable the format. Formats are never deleted; only inactivated.

Format Type – Select the general type of message that will be parsed by this format. Options are Custom, Delimited, Fixed Width.


Configure Format

- Configure Delimited Format										
Load from Template										
Field Delimiter	Comma <input type="button" value="v"/>									
Fields	<table border="1"> <thead> <tr> <th>Action </th> <th>Field</th> <th>Position </th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;">No Fields have been defined.</td> </tr> <tr> <td colspan="3" style="text-align: center;">  Add Patient  Add Associate </td> </tr> </tbody> </table>	Action 	Field	Position 	No Fields have been defined.			 Add Patient  Add Associate		
Action 	Field	Position 								
No Fields have been defined.										
 Add Patient  Add Associate										

Load from Template – Use this button to load a pre-configured format of the type selected above in Format Type. If a suitable option is not available, use the options below to customize a format.

It is recommended to submit a ticket to the interfaces department if custom setup is needed for the remainder of the options in this section: esone.support@DeliverHealth.com.

Testing

- Testing	
Test	Click here to select a test file 

Test – Use the Run Test button to test the configured options against a local associate file.

ShadowLink – Dictation Formats

Dictation formats are used to parse the dictation files received from the remote computer by ShadowLink into outstanding dictations of the client. Use this section to Add, Edit, or Copy dictation formats.





Format Information

Name – Assign a unique name for this format. This name will be displayed on subsequent screens to identify this format (50 chars max).

Description – Enter a descriptive summary of the purpose and specification of this format for your reference (500 chars max).

Is Active – Enable/Disable the format. Formats are never deleted; only inactivated.

Configure Dictation Format

Configure Dictation Format								
Load from Template								
Header File Type	No Header File ▼							
File Path Delimiters	<input data-bbox="613 533 891 569" type="text" value="_\"/>							
Dictation Fields	<table border="1"> <thead> <tr> <th>Action </th> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Action 	Field	Value			
Action 	Field	Value						


Load from Template – Use this button to load a pre-configured format. If a suitable option is not available, use the options below to customize a format.


It is recommended to submit a ticket to the interfaces department if custom setup is needed for the remainder of the options in this section: esone.support@DeliverHealth.com.


ShadowLink – Transcription Formats


Transcription Formats

Show Inactive Formats

 Add New Format

 Edit

 Copy

 Show ShadowLink Workflow

Transcription formats are used to determine the format and naming of transcriptions sent from the remote computer by ShadowLink. Use this section to Add, Edit, or Copy transcription formats.

Format Information





























Add New Transcription Format	
- Format Information	
Name	<input type="text"/> *
Description	<input type="text"/>
Active	<input checked="" type="checkbox"/>

Name – Assign a unique name for this format. This name will be displayed on subsequent screens to identify this format (50 chars max).

Description – Enter a descriptive summary of the purpose and specification of this format for your reference (500 chars max).

Is Active – Enable/Disable the format. Formats are never deleted; only inactivated.

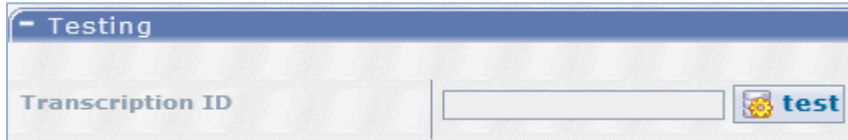
Configure Transcription Format

Configure Transcription Format																	
Load from Template	 Load																
Format Type	DOC																
Use Print Template	<input checked="" type="checkbox"/>																
File Path	<p>[Transcription ID].DOC</p> <table border="1"> <thead> <tr> <th colspan="2">Action</th> </tr> </thead> <tbody> <tr> <td> Edit</td> <td> Move Up</td> </tr> <tr> <td> Move down</td> <td> Delete</td> </tr> <tr> <td>[Transcription ID]</td> <td></td> </tr> <tr> <td> Edit</td> <td> Move Up</td> </tr> <tr> <td> Move down</td> <td> Delete</td> </tr> <tr> <td>.DOC</td> <td></td> </tr> <tr> <td colspan="2"> Add</td> </tr> </tbody> </table>	Action		 Edit	 Move Up	 Move down	 Delete	[Transcription ID]		 Edit	 Move Up	 Move down	 Delete	.DOC		 Add	
Action																	
 Edit	 Move Up																
 Move down	 Delete																
[Transcription ID]																	
 Edit	 Move Up																
 Move down	 Delete																
.DOC																	
 Add																	
Rendering Info	A custom rendering is being used. To adjust the format, please contact Emdat. Click here to submit an Interfacing request.																

Load from Template – Use this button to load a pre-configured format. If a suitable option is not available, use the options below to customize a format.

It is recommended to submit a ticket to the interfaces department if custom setup is needed for the remainder of the options in this section: esone.support@DeliverHealth.com.

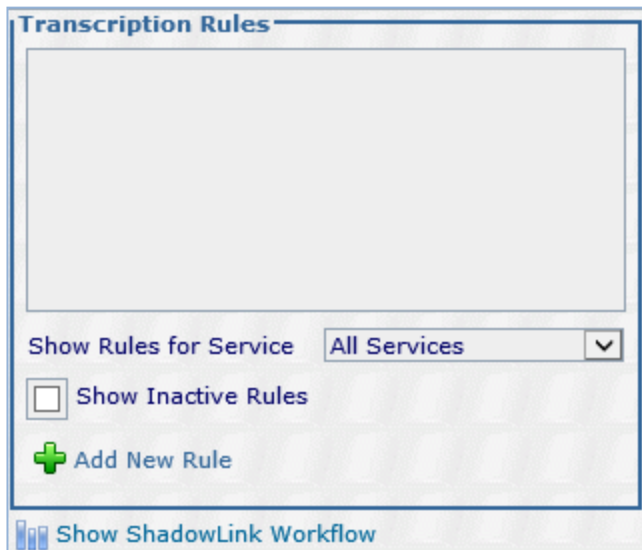
Testing



The screenshot shows a window titled "Testing". Inside the window, there is a label "Transcription ID" followed by an empty text input field. To the right of the input field is a button with a yellow gear icon and the text "test".

Transcription ID – After specifying the rendering info you can click the test button and test this rendering specification against an existing Transcription.

ShadowLink – Rules



The screenshot shows a window titled "Transcription Rules". The main area is a large, empty rectangular box. Below this box, there is a label "Show Rules for Service" followed by a dropdown menu currently showing "All Services". Below the dropdown is a checkbox labeled "Show Inactive Rules", which is currently unchecked. Below the checkbox is a green plus icon followed by the text "Add New Rule". At the bottom of the window, there is a blue icon followed by the text "Show ShadowLink Workflow".

Transcription rules are used to determine when a Transcription ID will export. This includes the workflow trigger and filters based on user, location, and document types.

Rule Information

Add New Transcription Rule	
- Rule Information	
Name	<input type="text"/> *
Description	<input type="text"/>
Include All Linked Documents	<input type="checkbox"/>
Is Active	<input checked="" type="checkbox"/>

Name – A unique name for this rule. This name will be displayed on subsequent screens to identify this rule (50 chars max).

Description – A descriptive summary of the purpose and operation of this rule for your reference (500 chars max).

Include All Linked Documents – Option to include all documents that are linked to this document in the render.

Is Active – Enable/Disable the rule. Rules are never deleted; only inactivated.

Transcription Delivery Method

- Transcription Delivery Method	
Service Accounts	
Demoraj	
<input checked="" type="checkbox"/>	Tran Delivery to Folder - Format <input type="text"/>

Select the service and format that will be used for this Rule.

Workflow Trigger

Workflow Trigger
?

Folders Triggered

<input type="checkbox"/>	Delivered
<input type="checkbox"/>	Completed from Proxy Based and Location Based
<input type="checkbox"/>	Completed from Signature Required
<input type="checkbox"/>	Completed from Print for Mail and Internal Only
<input type="checkbox"/>	Edited

Select one or more workflow positions to trigger an export to occur when the transcription leaves that position and whether editing after export will re-trigger the export.

Note: If there are multiple folders in a single position in the workflow a single export will be triggered when the transcription has left both folders.

Document Types

Document Types

Include All Document Types	<input checked="" type="checkbox"/>
Require Client Code	<input type="checkbox"/>
Require Dictation Id	<input type="checkbox"/>

Include All Document Types – Check this box to enable this rule for all document types. If unchecked more options will appear to customize which document types are enabled for this rule.

Require Client Code – Check this box to require the client code field to be set in order for an export to be generated.

Require Dictation ID – Check this box to require the dictation id field to be set in order for an export to be generated.

Locations

Locations	
Include All Locations	<input checked="" type="checkbox"/>
Require Client Code	<input type="checkbox"/>
Require Dictation Id	<input type="checkbox"/>

Include All Locations – Check this box to enable this rule for all locations. If unchecked more options will appear to customize which locations are enabled for this rule.

Require Client Code – Check this box to require the client code field to be set in order for an export to be generated.

Require Dictation ID – Check this box to require the dictation id field to be set in order for an export to be generated.

Users

Users	
Based on	Dictating User <input type="button" value="v"/>
Include All Users	<input checked="" type="checkbox"/>
Require Client Code	<input type="checkbox"/>
Require Dictation Id	<input type="checkbox"/>

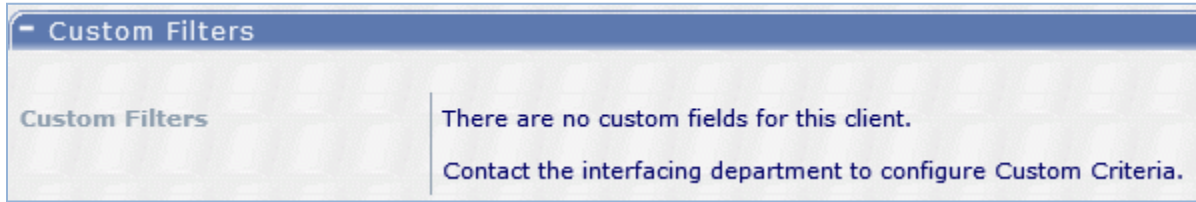
Based on – Select which type(s) of users will trigger exports. Options are Dictating User, Authenticating User or Both.

Include All Users – Check this box to enable this rule for all users. If unchecked more options will appear to customize which users are enabled for this rule.

Require Client Code – Check this box to require the client code field to be set in order for an export to be generated.

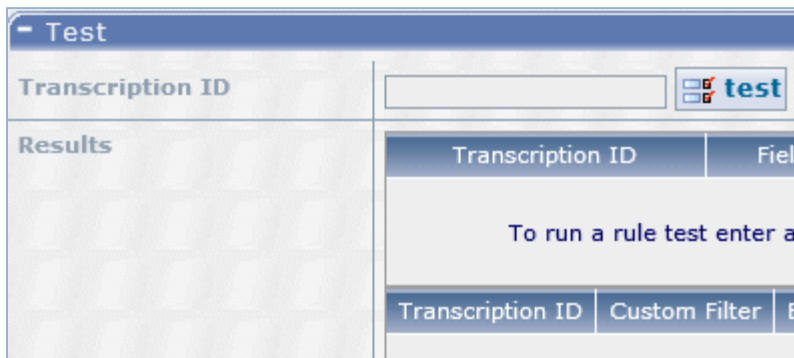
Require Dictation ID – Check this box to require the dictation id field to be set in order for an export to be generated.

Custom Filters



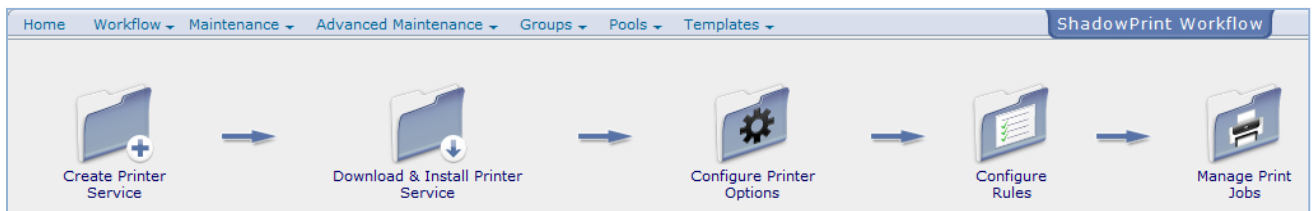
It is recommended to submit a ticket to the interfaces department if custom setup is needed for the options in this section: esone.support@DeliverHealth.com.

Test



Transcription ID – Enter a TID then press the Test button to determine if that TID entered would export based on the rules selected and why or why not.

ShadowPrint – Workflow



This is a graphical representation of the workflow to setup ShadowPrint for a client.

ShadowPrint – Services

ShadowPrint Services

Raj2 (raj)

Show Inactive Services
+ Add New Service
✎ Edit Raj2 (raj)
📄 View Rules on Raj2 (raj)

Printers Configured

Printers for select service.

🖨️ Edit Printer Setup

📄 Show ShadowPrint Workflow

Edit Service

To add or edit printer service click either add or edit.

Edit RAJ (admin) ShadowPrint Service ?

Service ID	4
Service Name	<input type="text" value="RAJ"/> *
Service Description	<input type="text" value="Raj's Computer"/>
Service Active	<input type="checkbox"/>
Login	<input type="text" value="admin"/> * Password <input type="text"/>
IP Address	192.168.20.184
Notification E-Mail	<input type="text"/> *
Local Workstation Name	RAJ 🗑️ clear

Service ID – This is a unique system generated identification number.

Service Name – Assign a unique name for the machine running the ShadowPrint Service. This name will be displayed on subsequent screens to identify this service. (50 chars max)

Service Description – A general description of the service.

Service Active – If checked the service is active or “on”. If unchecked the service is inactive or “off”.

Login – Assign a unique login for this service. When ShadowPrint is installed this information will be needed.

Password – Assign a unique password for this service. When ShadowPrint is installed this information will be needed.

Note: Service logins must be unique between ShadowLink and ShadowPrint within a client.

Notification E-Mail – Emails will be sent to this address when certain error conditions exist in the ShadowPrint Service. Use a semi-colon to specify multiple e-mail addresses in this field.

When all of the above fields have been completed click save to continue.

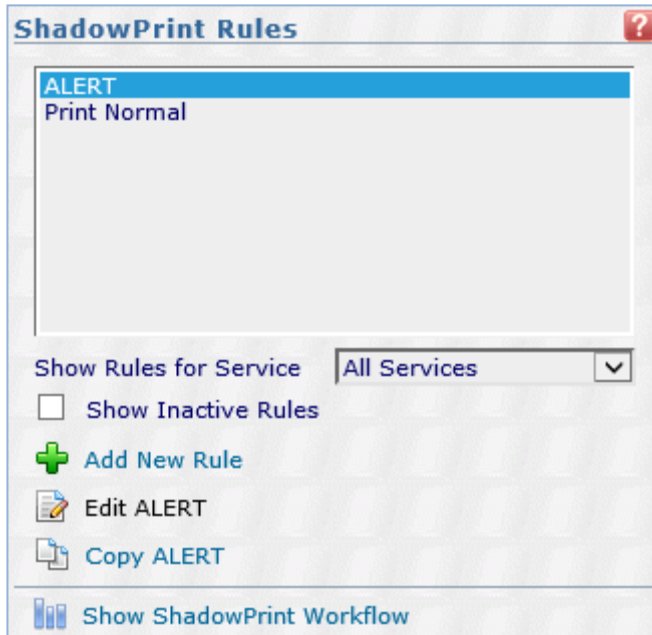
Edit Printer Setup

Edit Printer FinePrint on RAJ (admin) ?	
Printer Name	FinePrint *
Printer Port (path)	FinePrint
Printer Model	FinePrint 6
Schedule	<input checked="" type="checkbox"/> Sunday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
	<input checked="" type="checkbox"/> Monday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
	<input checked="" type="checkbox"/> Tuesday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
	<input checked="" type="checkbox"/> Wednesday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
	<input checked="" type="checkbox"/> Thursday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
	<input checked="" type="checkbox"/> Friday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
	<input checked="" type="checkbox"/> Saturday Printing Time 12 : 00 AM thru 11 : 59 PM Continue printing queued transcriptions after 11:59 PM <input type="checkbox"/>
Spool Limit	10

Schedule- In this section you can define the days/times you would like this printer to print. Check each day you would like the printer to be available and then define the time frame for that day. By default the printer is always available.

Spool Limit- This setting defines the maximum number of print jobs to be spooled by the printer at a time. The default setting is 10.

ShadowPrint – Rules



ShadowPrint Rules

ALERT
Print Normal

Show Rules for Service: All Services

Show Inactive Rules

+ Add New Rule

✎ Edit ALERT

📄 Copy ALERT

Show ShadowPrint Workflow

Use the add, edit, or copy buttons to create or modify rules for which documents print, when in the workflow, and to which services/printers.

Rule Information



Rule Information	
Rule ID	59
Rule Name	ALERT *
Active	<input checked="" type="checkbox"/>

Rule ID – This is a system generated identification number.

Rule Name – The name you would like to give this rule.

Active – If checked this rule is active or “on” if unchecked this rule is inactive or “off”.

Printer Selection

Printer Selection – Select the printer you would like to use for this rule.

Options

Priority – Priority defines the next transcription to be spooled from the print queue. It will not change the order of printing for transcriptions already spooled.

Number of Copies – Number of copies to print at each printer defined in this Rule.

Print Type – There are three options here.

- **Use Standard** – Prints the original transcription, enables options to specify header and footer.
- **Use Clinician** – Prints a copy for every clinician on the transcription, enables options to specify header and footer.
- **Use Associate** – Prints a copy for every external associate on the transcription, enables options to specify header and footer.

Triggers

Triggers	
Reprint After Edit	<input checked="" type="checkbox"/>
Trigger Behavior	<input type="radio"/> Print the transcription after each selected trigger <input checked="" type="radio"/> Do not print the transcription until after all selected triggers
Folders Triggered	<input checked="" type="checkbox"/> Delivered <input checked="" type="checkbox"/> Completed from Proxy Based <input checked="" type="checkbox"/> Completed from Location Based <input checked="" type="checkbox"/> Completed from Signature Required <input checked="" type="checkbox"/> Completed from External or None <input checked="" type="checkbox"/> Completed from Internal Only <input checked="" type="checkbox"/> Completed from Proxy Based and Location Based <input checked="" type="checkbox"/> Completed from External or None and Internal Only

Reprint After Edit – This option will automatically re–print a transcription after it has been edited.

Trigger Behavior – There are two options to determine when the print job will be triggered.

- **Print the Transcription After Each Selected Trigger** – This will print a copy of the transcription each time it passes a selected trigger. If multiple trigger folders are selected and the transcription passes each of those triggers it will be printed multiple times.
- **Do Not Print the Transcription Until After all Selected Triggers** – This will only print the transcription after all triggers selected have been passed.

Folders Triggered – The actions available to be selected as a trigger.

- Delivered
- Completed from Review 1
- Completed from Review 2
- Completed from Preliminary
- Completed from Final 1
- Completed from Final 2
- Completed from Review1 and Review2
- Completed from Final1 and Final2

Document Types

Document Types	
All Document Types	<input type="checkbox"/>
Document Types Triggered	<input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> ALERT <input type="checkbox"/> Appoint <input type="checkbox"/> Chart <input type="checkbox"/> CHI OV <input type="checkbox"/> Letter <input type="checkbox"/> Note <input type="checkbox"/> opreport <input type="checkbox"/> TestDar

All Document Types – This will select all document types, even those created in the future.

Document Types Triggered – Use this section to select individual document types to be printed.

Locations

Locations	
Based on	<input type="radio"/> Patient <input checked="" type="radio"/> Transcription
All Locations	<input checked="" type="checkbox"/>
Location Groups	<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Admin <input type="checkbox"/> East <input type="checkbox"/> West
Location	

Based on – Select either the patient or the transcription to make the rule based on the location for either the patient or the location listed on the transcription.

All Locations – This will select all locations, even those created in the future.

Location Groups – Select the location groups you would like to include in this rule.

Locations – Select which locations you would like to include in this rule.

Users

Users	
Based on	<input checked="" type="radio"/> Dictating User <input type="radio"/> Authenticating User
All Users	<input checked="" type="checkbox"/>
User Groups	<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Admin <input type="checkbox"/> Default Settings <input type="checkbox"/> Phys <input type="checkbox"/> Staff
+ User	

Based on – Select either dictating user or authenticating user.

- **Dictating User** – This would print transcriptions for the selected dictator, regardless of and additional authenticators for the transcription.
- **Authenticating User** – This would only print transcriptions for the user who authenticated the transcription, regardless of who dictated the transcription.

All Users – This option will select all users, even those created in the future.

User Groups – Select which user groups you would like to include in this rule.

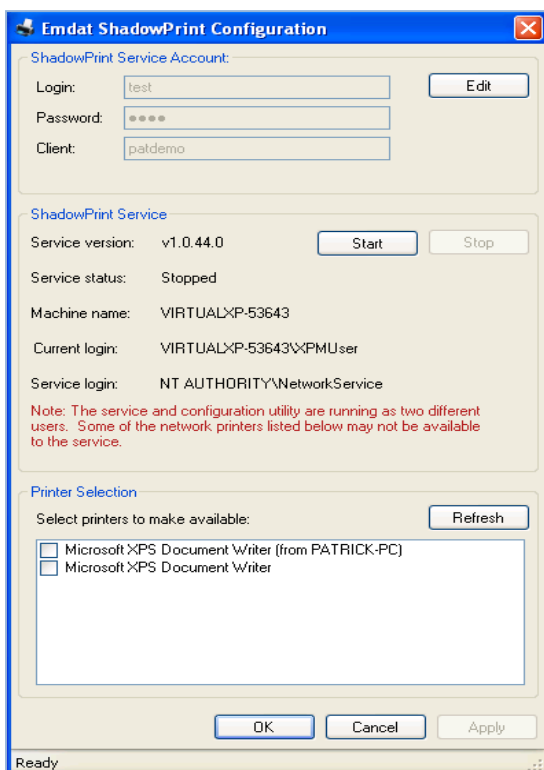
Users – Select which users you would like to include in this rule.

ShadowPrint – Installation and Configuration

The following section is performed on the client's computer. These steps are necessary to complete the setup in the Printer Setup and Rules sections.

Install ShadowPrint from here: <https://www.escription-one.com/Software/ShadowPrint>

Once this setup is complete, run the application to see the following window:



Please note the printer setup will be done on the client computer that is running the ShadowPrint service.

Login – The unique login created in the Edit Service section.

Password – The password created in the Edit Service section.

Service Version – The version of the ShadowPrint software installed.

Service status – This should be running. If it is not running transcriptions will not print. To start the service click the start button.

Machine Name – The name of the computer that this service is running on.

Current Login – The user that is logged into the computer.

Service Login – The user the service is running as.

Printer Selection – Check the printers that you would like to make available to the service.

Once all settings have been entered click ok.

Distribution – Rules

*

Management		Maintenance		hosp Client Maintenance		Inquiry	
Home		Distribution Rules					
Inventory Report		Page 1 of 1					
Name	Triggers	Roles	Document Types	Locations	Dictating Users	Authenticating Users	Associates
	All	All	All	All	All	All	All
Authenticator	Preliminary	Additional Authenticator, CC Associate	All	All	All	All	All
Fax CCs	Delivery	CC Associate	All except Imaging Report	All	All	All	All except James Bartholomew, Franklyn Cartwright
Print for Attending	Delivery	Attending	Chart Note	All	All	All	All
Print to 1st Flr Discharge Summ	Marked For Review 2	Admitting	Discharge Summary	East Campus	All	All	All

Distribution rules allow more precise control over how a report is distributed. Users can configure when, where, and to whom a document should go based on criteria such as document type, location, dictating user, authenticating user, and more. Rules are initiated based on selected workflow trigger(s). If all criteria specified for the rule matches the document, the rule is run.

Rule Information

Management		Maintenance		hosp Client Maintenance		Inquiry							
Home		Distribution Rules		Workflow		Maintenance							
		Advanced Maintenance		Groups		Pools							
		Templates											
Add New Distribution Rule													
<div style="border: 1px solid #ccc; padding: 10px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> - ? Distribution Rule Information </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Name</td> <td style="padding: 5px;"><input type="text" value=""/></td> </tr> <tr> <td style="padding: 5px;">Description</td> <td style="padding: 5px;"><div style="border: 1px solid #ccc; height: 40px;"></div></td> </tr> <tr> <td style="padding: 5px;">Rule Active</td> <td style="padding: 5px;"><input checked="" type="checkbox"/></td> </tr> </table> <div style="margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; display: flex; align-items: center;"> + Workflow Trigger </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px; display: flex; align-items: center;"> + Roles </div> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> + Document Types </div> </div> </div>								Name	<input type="text" value=""/>	Description	<div style="border: 1px solid #ccc; height: 40px;"></div>	Rule Active	<input checked="" type="checkbox"/>
Name	<input type="text" value=""/>												
Description	<div style="border: 1px solid #ccc; height: 40px;"></div>												
Rule Active	<input checked="" type="checkbox"/>												

Name – Assign a unique name to the rule. This name will be used on subsequent screens to identify the rule. This is a required field.

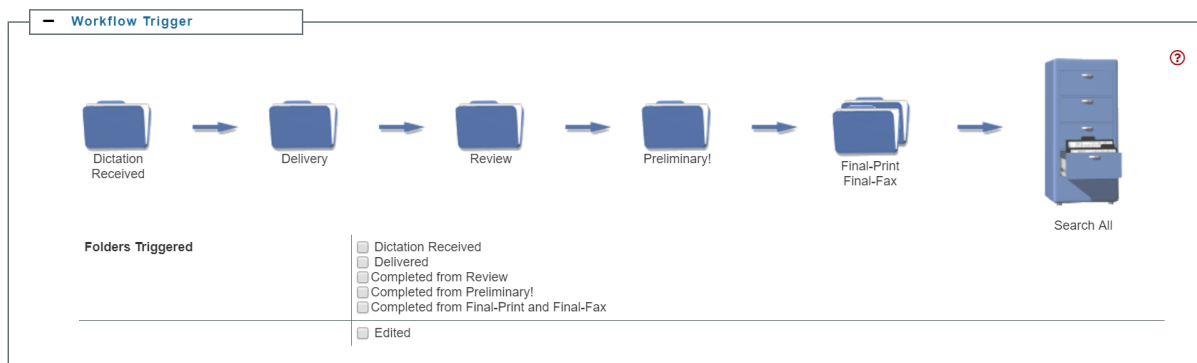
Description – Enter a descriptive summary of the rule triggers and other helpful information. (500 chars max)

Rule Active – On/Off switch for the rule. If a rule is no longer needed, temporarily or permanently, uncheck this box to deactivate the rule. It will not be deleted.

Once you name and describe the rule, you must select triggers and filters for the rule.

Note: All rules matching the criteria of a particular dictation will run.*

Triggers



Select one or more workflow positions to trigger a distribution when the transcription leaves that position. Note that the name displayed for the folders will reflect the name set up for the client's workflow folders.

If multiple workflow positions are chosen, and a job leaves each position as a result of separate actions, the job will be distributed after leaving each position. If multiple workflow positions are chosen, and a job leaves all positions as a result of one action, then the job will be distributed only once.

Dictation Received – Runs the rule after the dictation has been received. This is used in very rare circumstances, as there is no transcription content available at the time, only data related to the transcription.

Delivered – Runs the rule after the transcription has been typed and delivered to the client.

Completed from Marked For Review – Runs the rule once the transcription is past this point in the workflow.

Completed from Preliminary – Runs the rule once the transcription is past this point in the workflow.

Completed from Final Print or Final Fax – select to run the rule once the transcription is past this point in the workflow.

Edited – Runs the rule any time the transcription is edited after the first trigger point.

Roles

Select who will receive the document when the dictation passes the workflow trigger. You can select one or more roles. To print all transcriptions, chose the Dictator role and set all filters to Include All.

- Roles
?

Roles

- Dictator
- Additional Authenticator
- CC Associate
- Attending
- Referring
- Admitting
- Primary Care
- Consulting
- Ordering

The following fields are available as filters. Click on a field to expand it, or to expand all fields, click 'expand all' at the bottom of the screen.

- + Document Types
- + Location Groups
- + Locations
- + User Groups
- + Users
- + Authenticating User Groups
- + Authenticating Users
- + Patient Types
- + Patient Classes
- + Patient Location Descriptions
- + Associates

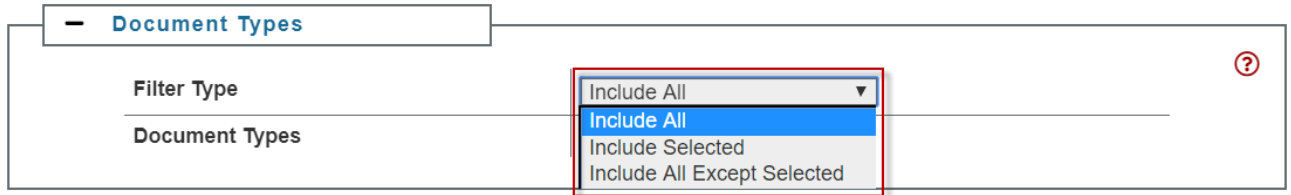
When adding associates, note that:

- When distributing via the 'Fax Associate' method, the rule will check whether an associate has auto-fax enabled before queuing up a fax. If auto-fax is not enabled, no fax will be sent to that associate.
- The rule will only match if the selected associate(s) is in one of the selected recipient roles (see 'Roles' above).
- If an associate is in multiple roles on a transcription, or the transcription matches multiple rules that include the same associate, then the associate will only receive one copy of the transcription.

When adding user groups and users:

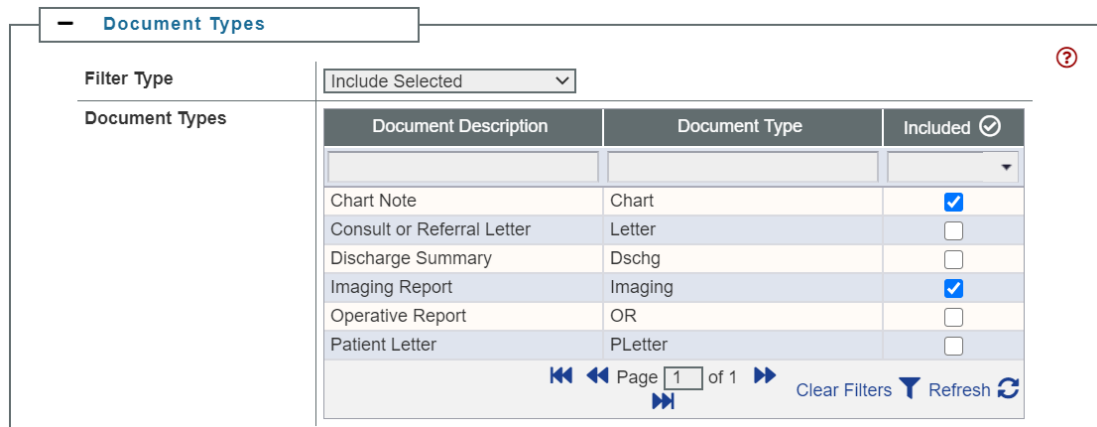
- A rule will pass only if the user matches the user group filter AND the user filter.

For each of the above filters, three options are available:



- **Include All** – enables the rule for all the filter’s values. This is the default.
- **Include Selected** –provides a list of values to choose from. The rule will run only when the selected value(s) match a dictation. Use this option to make a small number of selections from a larger list.

Click the check boxes to make selections. Filter a list by typing in the text box above the grid.



- **Include All Except Selected** – provides a list of values to choose from. The rule will run only when the selected value(s) do NOT match a dictation. Use this option when you want to include the majority of the list, with only a few exceptions.

Distribution Options

Distribution rules can be sent to an associate via fax, to a ShadowPrint printer, or though the ShadowLink service.

Note: If 'Fax Associate' is selected as the distribution method and the distribution is intended for the role of 'Dictator' or 'Authenticator', the Dictator/Authenticator must be linked to an Associate via the Referral User section on the Edit Associate screen. The Dictator or Authenticating User must have the AutoFax and InQuery options checked on their associate record, have the appropriate user selected in the Referral User drop-down (see below), and have a valid Fax Number populated in order to receive their faxes.

Distribution options:

- **Fax Associate** – faxes the document to the fax number that has been entered in InCommand for an associate.
- **Fax Specific Number** – faxes the document to a specific number that you enter here.

Note: To prevent configuration issues when adding a new distribution rule with a fax delivery type, a warning will be displayed if there is an AutoFax trigger already enabled.

- **Print** – prints the document to one or more ShadowPrint printers (printers available for the local client). If this option is selected, all printing options that are currently available on the ShadowPrint rules screen can be configured.
 - **Priority** – defines the next transcription to be spooled from the print queue. Transcriptions queued with a higher priority are printed first (1 is the highest priority, 10 is the lowest; and 5 is the default priority setting and is considered normal). Priority will not change the order of printing for transcriptions already spooled.
 - **Number of Copies** – indicates the number of copies of the transcription to print at each printer defined in the rule.
 - **Use Distribution Rule Footers** – uses the distribution rule footers as configured on the print template. This option is commonly used to indicate who the recipient of a given print job is for when there are multiple roles enabled for a given printer. Documents will be printed with 'Copy To: [Recipient name]' in the footer. When this option is selected, standard footers will be overridden.

Note: The default Distribution Rule footer is set to 'Copy To: [Recipient name]' but can be changed to accommodate the client's needs.

- **Use Cover Page** – allows adding a cover page to ShadowPrint jobs. It is only for use with print jobs; **None** is selected by default. To add a cover page, select **DOCX Cover Page** from the drop-down menu. Cover page information will be pulled from the ShadowLink Transcription formats. The format must be of type DOCX. Please contact Support for assistance in creating the desired rendering information for your cover page.
- **Watermark** – allows for an override of the default watermark assigned to the document type.
 - **Do not Override** – The document type's default watermark will apply.
 - **Copy** – Transcriptions always print with the word "Copy" watermarked, regardless of the watermark setup for the document type.

- **None** – Transcriptions will always print with no watermark, regardless of the watermark setup for the document type.
- **Preliminary** – Transcriptions will always print with the word “Preliminary” watermarked, regardless of the watermark setup for the document type.

Printer	Service Account	Active	Included
Bullzip PDF Printer	spdocx	Active	<input type="checkbox"/>
Bullzip Printer (XPS)	spdocx	Active	<input type="checkbox"/>
Nuance PDF	sptest	Active	<input type="checkbox"/>
Bullzip PDF Printer	spxps	Active	<input type="checkbox"/>
Bullzip Printer (XPS)	spxps	Active	<input type="checkbox"/>
Bullzip PDF Printer	spxpsi	Active	<input type="checkbox"/>
Bullzip Printer (XPS)	spxpsi	Active	<input checked="" type="checkbox"/>

To select a printer, click the check box in the **Included** column. Multiple printers can be selected, either from the same or different services.

Click the Save button when you finish creating the rule.

Any rules that distribute to printers will appear on the ShadowPrint Rules management screen in InQuery (Services> ShadowPrint Rules).

- **ShadowLink** – distributes the document through the ShadowLink service. The available delivery options behave the same as they do for a ShadowLink rule.

ShadowScribe – Workflow



This is a graphical representation of the workflow to setup ShadowPrint for a client.

ShadowScribe – Sections

ShadowScribe Sections Displayed as:

- Active Medical History (5004)
- Active Medical Problem (5278) ^
- Anesthesia (5179)
- Chest And Heart (5106)
- Clinic Impression (5030)
- Complications (5157)
- Eent (5077)
- Impression (5030)
- Past Medical & Surgical History (5006) v
- Postoperative Diagnoses (5184)

+ Add Section

✎ Edit Section

✗ Delete Section

📄 Show ShadowScribe Workflow

Click the Add, Edit or Delete buttons to modify the sections available in ShadowScribe.

Edit Section

Edit Anesthesia Section ?

Search For ShadowScribe Section

Code:

Available ShadowScribe Sections

If this section title is recognized...

ANESTHESIA (5179)

ANESTHESIA GIVEN (5179) ▲

Anesthesia Given (5179)

Anesthesia Medications (5179)

ANESTHESIA MEDICATIONS (5179)

ANESTHESIA SEDATION (5179)

Anesthesia Sedation (5179) ▼

Anesthesia Used (5179)

Comes From Category Anesthesia (5179)

Display As

Custom Display

Use the Search to find a different ShadowScribe section below or make a selection by double clicking on an item to replace "Display as" name. If you cannot find the section you want, check the "custom display" box, add your own section name, and choose a section that is the closest match, or use the search to look for an entirely different section.

For optimal section recognition, you are encouraged to choose a section title that is dictated or most likely dictated.

It is recommended that the section name be in Initial Caps. For example, add "Allergies" instead of "ALLERGIES". Any casing changes, as specified in the Draft Rules form, are automatically applied when the job is delivered to the client.

If a mixed case scenario exists, use the Custom Display to set the proper casing.

ShadowScribe – Rules

Client Defaults

Use the drop down lists below to select the Document Type/User combination that you would like to edit the ShadowScribe Rules for.

All Document Types

for All Users

■ - No Active Profile

ShadowScribe Templates

Add/Edit Copy Delete

Show ShadowScribe Workflow

Use the drop-down lists below to select the Document Type/User combination that you would like to edit the ShadowScribe Rules for then click the Add/Edit, Copy, or Delete button to modify the rule.

Draft Rules Tab

Draft Rules | Template Options | Format Rules | Prev

Edit Alert! for Master, Administrative - admin ShadowScribe Draft

+ General Rules

+ Abbreviation Rules

- Advanced Rules

Section Title Capitalization	Default (Title case) <input type="text"/>
Section Title Generation	Default (All sections as c
Subsection Title Capitalization	Default (Title case) <input type="text"/>
Subsection Title Generation	Default (All sections as c

These are the formatting rules the ShadowScribe will apply when performing the recognition and transcription **General Rules** – These are some specific rules that can control certain output in the draft.

Note: The major output controlled by the ASR speech engine are set via the style guide. This guide needs to be selected prior to starting ASR voice recognition. Contact your eScription One ASR implementation specialist for more information.

Advanced Rules – These are advanced rules such as section and subsection capitalization and handling.

Template Options Tab

Draft Rules		Template Options	Form
Edit Alert! for Master, Administrative - admin Sha			
Notes	This is a VR note.		
Allow MT to Dismiss this Note	<input type="checkbox"/>		
Enforce Section Ordering	<input type="checkbox"/>		

Template Options – These are the options for the ShadowScribe Document Template. These include MT Notes options and enforced section ordering.

Notes – Notes that will be shown to an MT when they edit a document for this template in InScribe.

Allow MT to Dismiss this Note – When checked, an MT will be able to prevent this note from loading again, unless a change is made to the note. If left unchecked, an MT will not be allowed to suppress this note after viewing it once.

Enforce Section Ordering – When checked, the style sheet will format the sections in the order listed in the ShadowScribe document template regardless of the order dictated. The MT will see the sections in the dictated order but when the job is delivered or the MT does a preview with template, the order will appear according to the document template.

Note: Any dictated sections not part of the document template will appear after the sorted section it is closest to.

Format Rules Tab

 Draft Rules Template Options Format Rules Preview	
Edit Alert! for Master, Administrative - admin ShadowScribe Format Rules	
+ Section Rules	
- Subsection Rules	
Subsection Visibility	Default (Subsection should not display)
Title Visibility	Default (Display Subsection Titles) ▼
Title Case	Default (As Is) ▼
Bold Title	Default (On) ▼

Section Rules – These are the formatting rules that eScription One will apply to Sections when performing the styling process.




Subsection Rules – These are the formatting rules that eScription One will apply to Subsections when performing the styling process.

Preview Tab

 Draft Rules Template Options Format Rules Preview	
<p>ACTIVE MEDICAL HISTORY:</p> <p>This is a paragraph of text content.</p> <p>PREOPERATIVE DIAGNOSES:</p> <p>This is a paragraph of text content.</p> <p>IMPRESSION:</p>	

Use the section editor to add or remove content to the sections of the document template to preview how they will appear after the formatting rules have been applied.

Section Editor

Section	Actions
Active Medical History (5004)	    
Preoperative Diagnoses (5183)	    
Impression (5030)	    
Anesthesia (5179)	    
Procedure (5024)	    
Postoperative Diagnoses (5184)	    
Complications (5157)	    
<input type="text"/>	 Add

 - Section is not optional

Use this to add sections and subsections to the document template.



This drop-down menu lists all available sections for the client. Use the Add button to add the section selected. Sections are configured in Advanced Maintenance > ShadowScribe > Sections.



- Add Subsection to this Section button.



- Buttons to move the Section or Subsection up or down in the template.



- Edit Section Options button.



- Delete button.



- Add Paragraph button available when in the preview tab.



- Add List button available when in the preview tab.



- Add Table button available when in the preview tab.

Edit Section Options- Options Tab

Section – Use this list to change the section title and code for this section.

Action – Select the action to take on the content of the draft for this section. Options are prepend, append, and replace.

Optional – When checked this section is optional and will only appear in the document if the clinician dictates it, when unchecked the section will always appear in the document.

Section Content – Enter the content to load into this Section in InScribe when this document template is used and the section is marked Optional.

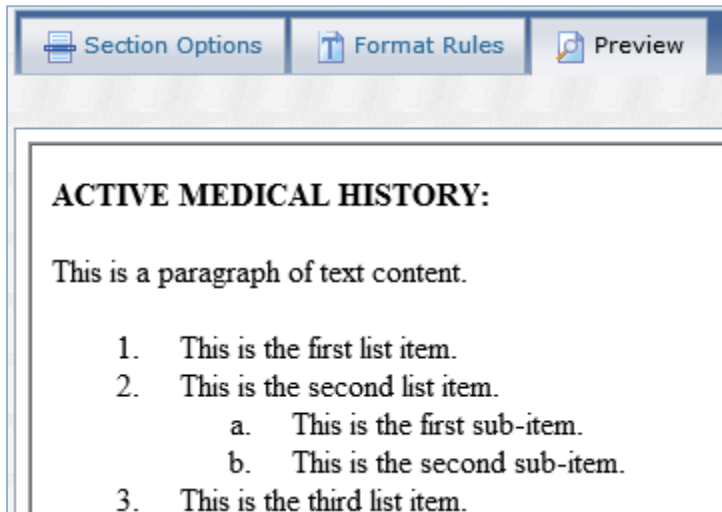
Note: This editor will allow you to paste rich text and HTML content from other editors, but not all types of content are supported. ShadowScribe templates may only contain paragraphs, lists, and tables. Tables and lists cannot be nested.

Edit Section Options- Format Rules Tab

Section Rules – These are the formatting rules that eScription One will apply to this specific section when performing the styling process overriding the default rules configured in the Section Rules of the Template.

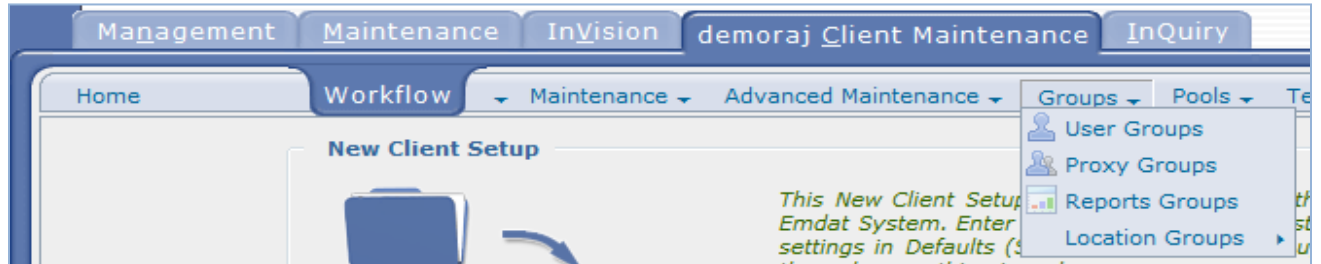
Subsection Rules – These are the formatting rules that eScription One will apply to this specific subsection when performing the styling process overriding the default rules configured in the Subsection Rules of the Template.

Edit Section Options- Preview Tab



Use the section editor to add or remove content to the sections of the document template to preview how they will appear after the formatting rules have been applied.

Groups



User Groups

User Groups is discussed in detail in [User Groups](#).

Proxy Groups

Proxy Groups
Proxy Groups will allow a user to create a Proxy Group and assign a name to the Group. Anyone with Access to this Proxy Group will have proxy rights to the users within the Group. A user can have user specific proxy access in addition to Group Proxy Access.

 Add New Group

Proxy Groups will allow a user to create a Proxy Group and assign a name to the Group. Anyone with Access to this Proxy Group will have proxy rights to the users within the Group. A user can have user specific proxy access in addition to Group Proxy Access.

Add or Edit Proxy Group



To add or edit a proxy group click on add or edit.

Proxy Group Information

Add New Proxy Group

Proxy Group Information

Group Name	<input style="width: 90%;" type="text"/>
Group Description	<input style="width: 90%;" type="text"/>

Group Name – Assign a name to this proxy group.

Group Description – A more detailed description of the proxy group.

Users Proxy

User's Proxy

Available Proxy Users	Proxy Rights	Edit	Complete	Edit Header Only
Doe, John (jdoe)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jenkins, Léroy (ljenkins)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Master, Administrative (admin)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
O'Malley, John (jomalley)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
test, test (test)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
test2, test2 (test2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Therapist, John (jtherap)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Therapist, Steven (stherapi)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select the users and the level of proxy to selected users. When finished click save.

Assign Users to Group

Assign Users To Group Admin

<p>Users in Group</p> <div style="border: 1px solid #ccc; padding: 2px; min-height: 100px;"> <p>Admin, Sally (sadmin)</p> <p>Master, Administrative (admin)</p> </div>	<p>← add all</p> <p>← add</p> <p>remove →</p> <p>remove all →</p>	<p>Available Users</p> <div style="border: 1px solid #ccc; padding: 2px; min-height: 100px;"> <p>Doe, John (jdoe)</p> <p>Jenkins, Léroy (ljenkins)</p> <p>O'Malley, John (jomalley)</p> <p>Staff, Adam (astaff)</p> <p>Staff, Lisa (lstaff)</p> <p>test, test (test)</p> <p>test2, test2 (test2)</p> <p>Therapist, John (jtherap)</p> <p>Therapist, Steven (stherapi)</p> </div>
---	---	---

Show Inactive Users

This section allows you to assign (add) Users to a Group. A Group can also be assigned in User Setup; this allows you to perform the same operation much quicker for several Users.

Please note a User may only be assigned to one User Group at a time.

Report Groups

Report Groups

Report Groups define the access rights to InQuery Reports for a group of users. Individual Users assigned to a Report Group inherit the rights and features of the Group. Additional rights and features may be added in the individual's User Setup as well as the ability to override the rights and features that are set in these group settings.

Changing a right in a Report Group changes the right for all members assigned to that Report Group. Typical Groups include Physician, Attending Physician, Resident Physician, Nurse, Secretary, and Administrator.

Admin

- + Add New Group
- ✎ Edit Selected Group
- ✕ Delete Selected Group
- 👤 Assign Users to Group

Report Groups define the access rights to InQuery Reports for a group of users. Individual Users assigned to a Report Group inherit the rights and features of the Group. Additional rights and features may be added in the individual's User Setup as well as the ability to override the rights and features that are set in these group settings.

Changing a right in a Report Group changes the right for all members assigned to that Report Group. Typical Groups include Physician, Attending Physician, Resident Physician, Nurse, Secretary, and Administrator.

Add or Edit Report Group

- + Add New Group
- ✎ Edit Selected Group

To add or edit a report group simply add a name and description and select the reports that you would like this group to have access to. When finished click save.


Edit Selected Report Group

Report Group Information ?

Group Name	Admin
Group Description	Admin



- + Production Reports
- + Workflow Reports
- + User Reports
- + Miscellaneous Reports

Assign Users to Report Group

 [Assign Users to Group](#)

Assign Users To Group Admin

?

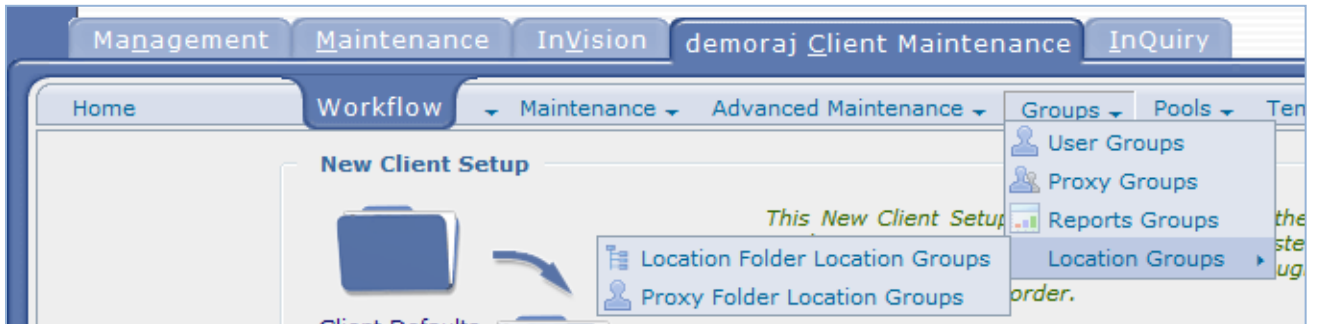
Users in Group		Available Users
Admin, Sally (sadmin) Master, Administrative (admin)	   	Doe, John (jdoe) Jenkins, Léroy (ljenkins) O'Malley, John (jomalley) Staff, Adam (astaff) Staff, Lisa (lstaff) test, test (test) test2, test2 (test2) Therapist, John (jtherap) Therapist, Steven (stherapi)

Show Inactive Users

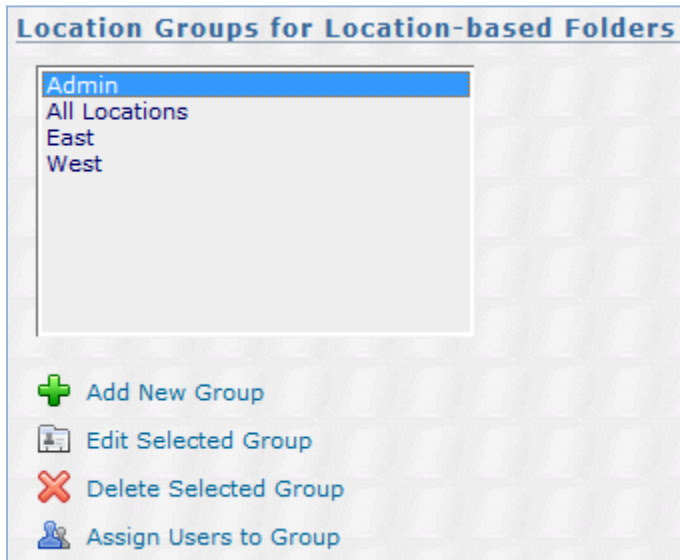
This section allows you to assign (add) Users to a Group. A Group can also be assigned in User Setup; this allows you to perform the same operation much quicker for several Users.

Please note, a User may only be assigned to one Report Group at a time.

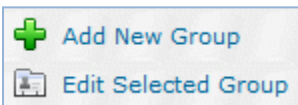
Location Groups



Location Folder Location Groups



Add or Edit a Location Group



Location Group Information

Edit Selected Location Group

Location Group Information

Group Name: Admin

Group Description:

Group Name – Please enter a meaningful short description for the Location Group being defined. 50 characters max.

Group Description – This field is for a more detailed description of this group.

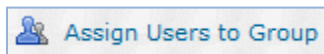
User's Locations

Select the location for this group.

User's Locations

Location	Access
Admin Office	<input checked="" type="checkbox"/>
Madison, East	<input checked="" type="checkbox"/>
Madison, West	<input checked="" type="checkbox"/>

Assign Users to group



This section allows you to assign (add) Users to a Group. A Group can also be assigned in User Setup; this allows you to perform the same operation much quicker for several Users.

Assign Users To Group Admin

Users in Group: Admin, Sally (sadmin)

Available Users:

add all

add

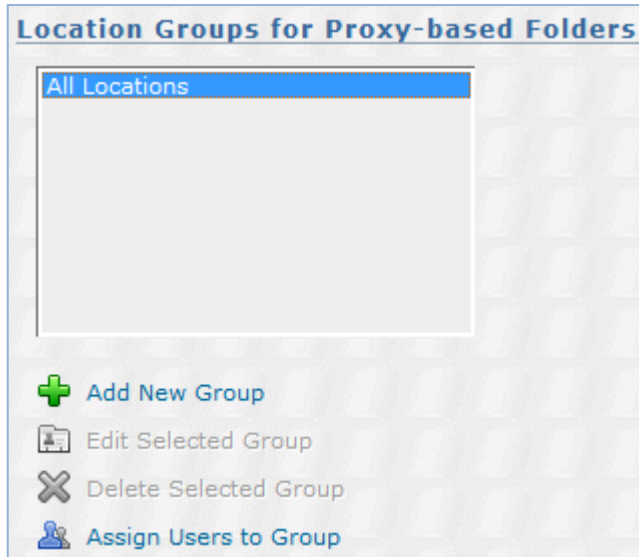
remove

remove all

Show Inactive Users

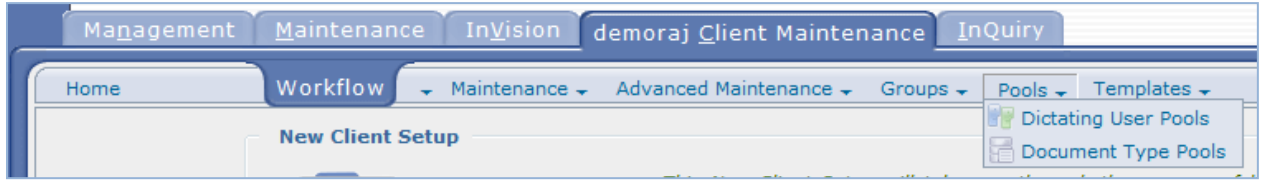
Please note a User may only be assigned to one User Group at a time.

Location Groups for Proxy Based Folder



The setup for this group is identical to the above Location groups for location based folders in the previous section.

Pools



Dictating User Pools

Pool Categories

Add New Pool Group

Edit Selected Group

A dictating user can only exist in a single Pool Category. The user can be a member of multiple pools within the same Pool Category, but cannot exist in two different Pool Categories. If the user you wish to add to a specific pool does not show up in the "Available Users" list (when editing users in a pool), that user is probably already a member of another Pool Category. If you remove a user from the 1st Pool Category, the user will immediately show up as an available user for the 1st and 2nd Pool Category

Steve Pool
Tony Pool

Add New Pool

Edit Selected Pool

Delete Selected Pool

Edit Users in Selected Pool

Dictating User Pools

Add or Edit Dictating User Pools

Add New Pool

Edit Selected Pool

Pool ID – This is a system-generated number to identify this pool.

Pool Name – The name you would like to give this pool.

Edit Users in Selected Pool

 Edit Users in Selected Pool

Dictators In Pool





Dictators In Pool		Available Dictators
Doe , John - jdoe O'Malley , John - jomalley test2 , test2 - test2 Therapist , Steven - stherapi	← add all ← add remove → remove all →	Master , Administrative - admin test , test - test Therapist , John - jtherap

Either add or delete users by adding them from the available users list or deleting the user from the dictators in pool list.

Document Type Pools

Document Type Pools

Normal Pool
 RUSH Pool

-  Add New Pool
-  Edit Selected Pool
-  Delete Selected Pool
-  Edit Documents in Selected Pool

Add or Edit Selected Pool


 Add New Pool
 Edit Selected Pool

Edit Document Type Pool	
Pool ID	1
Pool Name	<input type="text" value="Normal Pool"/>

Pool ID – This is a system generated number to identify this pool.

Pool Name – The name you would like to give this pool.

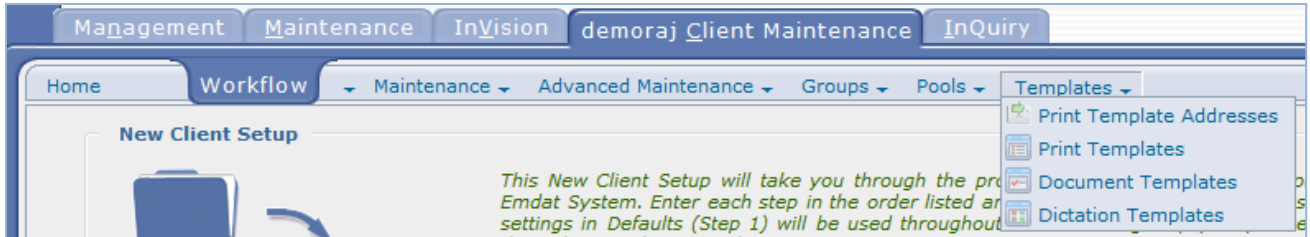
Edit Documents in Selected Pool

 Edit Documents in Selected Pool

Documents In Pool	
Documents in Pool	Available Documents
<ul style="list-style-type: none"> Chart Note Letter Next Appointment Note opreport 	<ul style="list-style-type: none"> Alert! CHI demo TestDar
<p>← add all</p> <p>← add</p> <p>remove →</p> <p>remove all →</p>	

Either add or delete document types by adding them from the available documents list or deleting the document from the documents in pool list.

Templates



Print Template Addresses

<p>Print Template Addresses</p> <p><i>This provides a centralized place to update address information for Users, Departments/Locations, Departments, and Locations. Select which address information to update from the following selection criteria.</i></p> <p>User Addresses <input type="text" value="Select User"/></p> <p>Department/Location Addresses <input type="text" value="Select Department"/> <input type="text" value="Select Location"/></p> <p>Department Addresses <input type="text" value="Select Department"/></p> <p>Location Addresses <input type="text" value="Select Location"/></p>	<p><i>Print Templates can incorporate address information to construct customized letterhead. Within the generic Print Template, the hierarchy of which address information to use is:</i></p> <ol style="list-style-type: none"> 1. Use address field from User Setup. 2. If it doesn't exist, then Use address field from Department/Location. 3. If it doesn't exist, then Use address field from Department. 4. If it doesn't exist, then Use address field from Location. 5. If it doesn't exist, don't print anything including a blank space or line. <p><i>This hierarchy applies to each address field individually. This way, the Print Template letterhead can be customized by location, by department, by the department at that location, and by the individual clinician.</i></p> <p><i>When requesting a print template to be created (ptemplates@emdat.com), please specify if you will be using this hierarchy, and if so, which parts of the hierarchy (or all of it).</i></p> <p><i>Note: The setup for Users, Locations, and Departments occurs under the Maintenance pull-down menus for the same name. Their respective addresses can also be entered there. The Department/Location address information may only be entered here.</i></p>
---	--

This provides a centralized place to update address information for Users, Departments/Locations, Departments, and Locations. Select which address information to update from the following selection criteria.

Print Templates can incorporate address information to construct customized letterhead. Within the generic Print Template, the hierarchy of which address information to use is:

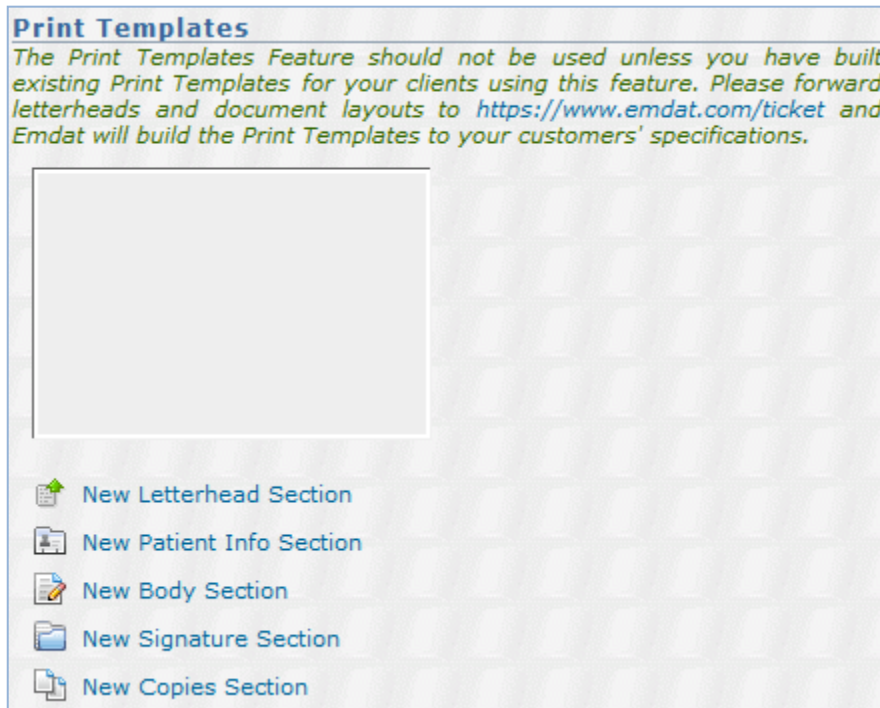
- Use address field from User Setup.
- If it does not exist, then Use address field from Department/Location.
- If it does not exist, then Use address field from Department.
- If it does not exist, then Use address field from Location.
- If it does not exist, don't print anything including a blank space or line.

This hierarchy applies to each address field individually. This way, the Print Template letterhead can be customized by location, by department, by the department at that location, and by the individual clinician.

When requesting a print template to be created (esone.support@DeliverHealth.com) please specify if you will be using this hierarchy, and if so, which parts of the hierarchy (or all of it).


Note: The setup for Users, Locations, and Departments occurs under the Maintenance pull-down menus for the same name. Their respective addresses can also be entered there. The Department/Location address information may only be entered here.


Print Templates





Print Templates


The Print Templates Feature should not be used unless you have built existing Print Templates for your clients using this feature. Please forward letterheads and document layouts to <https://www.emdat.com/ticket> and Emdat will build the Print Templates to your customers' specifications.

 New Letterhead Section

 New Patient Info Section

 New Body Section

 New Signature Section

 New Copies Section

The Print Templates Feature should not be used unless you have built existing Print Templates for your clients using this feature. Please submit letterheads and document layouts to esone.support@DeliverHealth.com, and eScription One will build the Print Templates to your customers' specifications.

Document Templates

Document templates are gone over in detail in [Document Templates](#).

Dictation Templates

Dictation templates are gone over in detail in [Dictation Templates](#).

Support

Get assistance for InCommand, and all other eScription One applications, here:

- Phone Support: 1-800-858-0080
- Support Email: esone.support@DeliverHealth.com
- InCommand Login: <https://www.escription-one.com/tspadmin>
- InQuiry Login: <https://www.escription-one.com/inquiry>

Appendix A – Validation Rules

Transcriptions can now be tested for certain criteria with validation rules, and if the criteria are met, the system can automatically mark a transcription for QA or Review and/or add comment tags without MT intervention. Transcription components that can be checked include demographics, transcription text, associates, authenticators, and dictation playback status. The goal is to find errors while in the transcription process and get them corrected prior to delivery, or if that cannot be accomplished, force them to the client's Review folder for error correction.

Validation Snippets

Validation Snippets are tests performed on transcription components to check a specific condition such as:

- Appointment record not selected – The appointment information on the transcription is not from a record in the appointment table. This means the MT did not perform a search or did not select an appointment record from the result of a search.
- Patient Name is Blank – The patient's name field on the transcription is blank.
- MT did not listen to Audio – The dictation was not played in InScribe.

Snippets are part of the criteria within a validation rule. See [Add New Rule](#). The Validation Rule determines the action the system will take when the rule is triggered, such as marking a job for QA or review, or adding a comment tag without MT intervention.

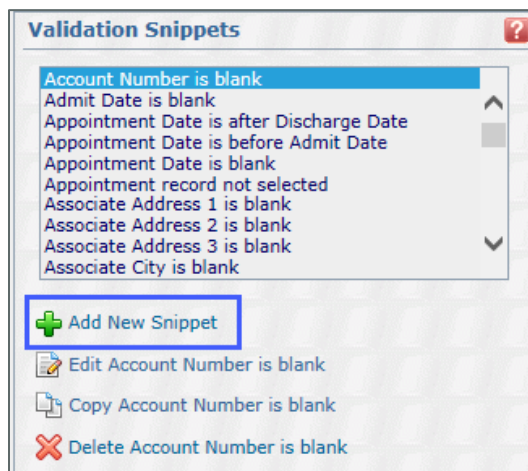
Creating Validation Snippets

Snippets can be created and edited in Advanced Maintenance > Validation Rules > Snippet Builder and come with over 30 pre-defined snippets. They can be used as is, customized for a particular condition(s), or be created from scratch.

Add New Snippet

Use this function to create a new snippet.

Click on the "Add New Snippet" link to display the snippet builder screen.



In the Snippet Information section, give the snippet a name and an optional description.

In the Snippet Definition section, create the condition that will be checked on the transcription. To create the Snippet

Action	And/Or	Field	Operator	Value
+		User Field 1	Contains	E

condition:

4. Click on the “Append New Snippet Clause” to add a new test.
5. Select the field to check from the drop-down list. This list contains all the transcription components to check.
6. Select the operator to test against. This list contains all the conditions to check against the field.
7. Depending on the operator, a value may be used as part of the test. In the above example the “Contains” operator is used to check if User Field 1 contains the letter “E”.

Add additional fields to check if needed. Snippets can be as simple as checking one field, or more complex by adding additional fields and operators.

Action	And/Or	Field	Operator	Value
+		User Field 1	Contains	E
+	And	Appointment ID	Is Missing	
+	Or	Account Number	Greater Than	50000

To add additional test criteria:

8. Click the “Append New Snippet Clause” below the previous snippet test.
9. Select an And/Or condition to combine the snippet tests.
 - a) When “And” is selected both field tests need to evaluate to true to satisfy the snippet condition.
 - b) When “Or” is selected only one field test needs to evaluate to true to satisfy the snippet condition.

In the example above, the snippet logic would be:

If ([User Field 1] contains an “E” AND [Appointment ID] is missing)

OR

([Account Number] > 50,000)

If the conditions in both User Field 1 and Appointment ID are true or the Account Number condition is true, the snippet test will be successful.

Note: Both the “Contains” and “Equal to” operators are not case sensitive. In the above example the User Field 1 value could have also been a lower case “e” and evaluate to true.

For more complex conditions containing multiple And’s and Or’s, “And” will always take precedence over “Or”.

Snippet Definition				
Action	And/Or	Field	Operator	Value
+ X		User Field 1	Contains	E
+ X	And	Appointment ID	Is Missing	
+ X	Or	Account Number	Greater Than	50000
+ X	And	Bed	Greater Than	210
+ X	Or	Blank Bracketed Field Count	Less Than	7
+ Append New Snippet Clause				

In the example above, the snippet logic would be:

If ([User Field 1] contains an “E” AND [Appointment ID] is missing)

OR

([Account Number] > 50,000 AND [Bed] > 210)

OR

([Blank Bracketed Field Count] < 7)

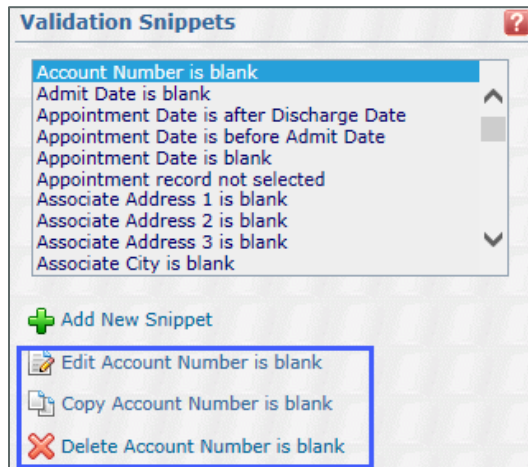
If **User Field 1** is true and **Appointment ID** is true, the snippet test would be successful. If those were false, then the **Account number** and **Bed number** condition would be evaluated. If both those conditions were true, the snippet test would be successful. If those were false, then the **Blank Bracketed Field Count** would be evaluated. If this was true, the snippet test would be successful. If that would false, the snippet test would be unsuccessful.

To remove a clause, click on the red X.

Action	And/Or	Field	Operator	Value
+ X		User Field 1	Contains	E
+ X	And	Appointment ID	Is Missing	

Edit, Copy, and Delete Snippet

Use these functions to make changes to, copy, or delete existing snippets.



MT Validation Rules

Validation Rules have actions that the system performs when the rule criteria are met. The heart of the rule is the snippet which triggers the action based on the rule settings. Rules are executed each time the transcription is uploaded by an InScribe user.

Each rule must contain at least one snippet. The rule tests a transcription against this snippet each time the transcription is uploaded by an MT. The rule may also contain additional criteria or filters to narrow the scope of the snippet to specific Document Types, Users, Locations, and STAT condition, or any combination of these. This allows great flexibility in creating the rule to handle specific scenarios.

For example, three dictators always want the date of service on their transcription. That is, unless they mark it as STAT. Then they want the transcription delivered to their Preliminary folder as soon as possible. To accomplish this, an MT Validation Rule could be created as consisting of:

- Missing Appointment Date (snippet)
- AND (Document Type = Chart Note, Consultation)
- AND (User = Dr. Stansfski OR Dr. Summers OR Dr. Noble)
- AND (Location = North Side)
- AND (STAT = No)

With the Actions of:

- Mark for Review
- Mark for QA

Under this rule, the Actions for a transcription with a missing appointment date for two document types, dictated by one of three dictators, at only one location are triggered only when the transcription is not STAT. If the transcription is STAT, then no Action is triggered.

See [Error! Reference source not found.](#) to see the setup for this rule.

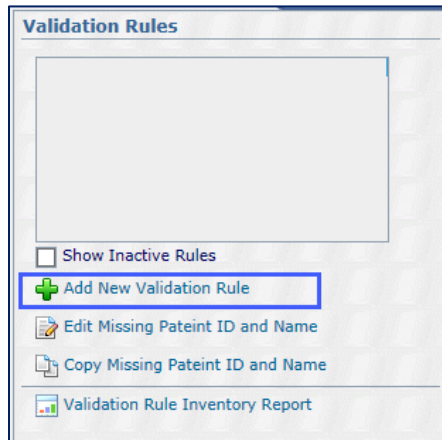
Creating MT Rules

Rule settings are found under Advanced Maintenance > Validation Rules > MT Rules.

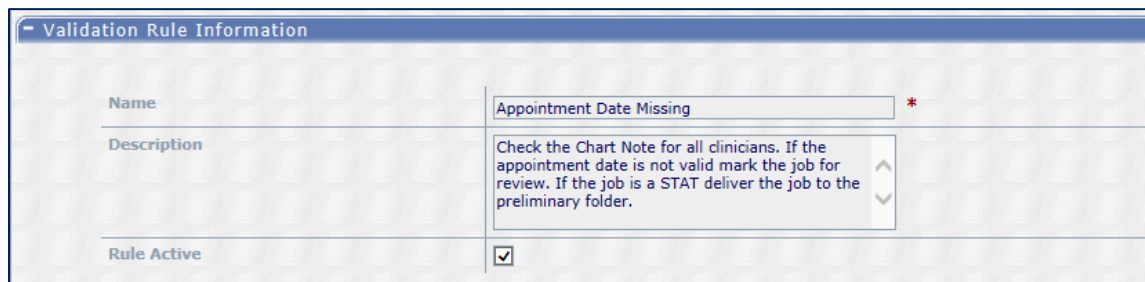
Add New Rule

Use this function to create a rule.

Click on "Add New Validation Rule" to display the rule screen.



In the Validation Rule Information section, give the rule a name and add an optional description. Please note that rules are inactive by default to allow setup to be completed and verified prior to applying to uploaded transcriptions. Please be sure to activate rules when they are ready to be used.



Name	Appointment Date Missing *
Description	Check the Chart Note for all clinicians. If the appointment date is not valid mark the job for review. If the job is a STAT deliver the job to the preliminary folder.
Rule Active	<input checked="" type="checkbox"/>

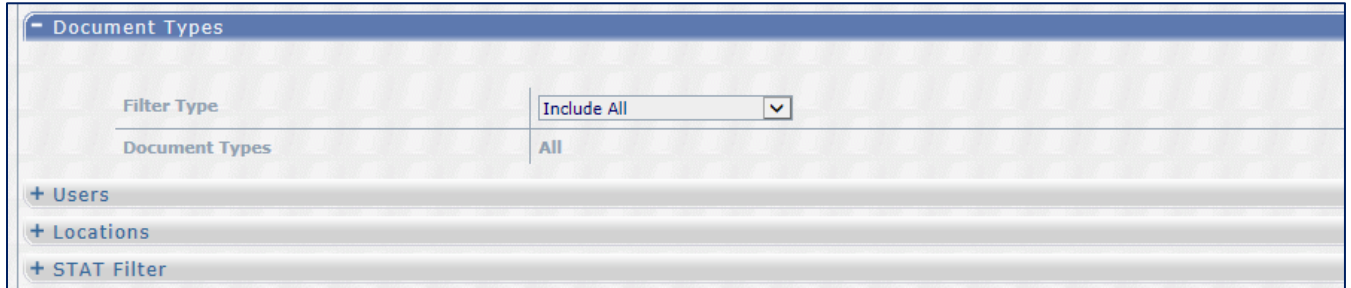
Adding Filters

For more specific workflows, filters can be applied to Document Types, Users, Locations, and STAT condition, or any combination of these.

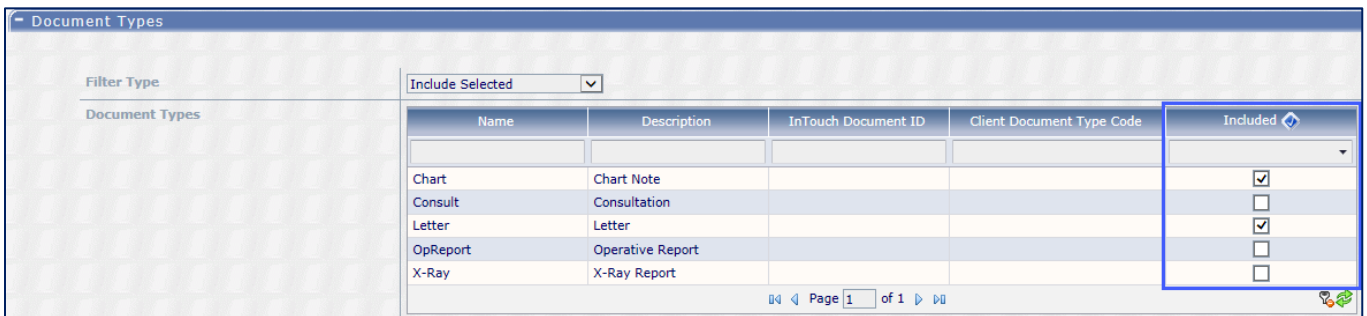
To add a filter:

Select the transcription component(s) you want to address with the rule and set the Filter Type:

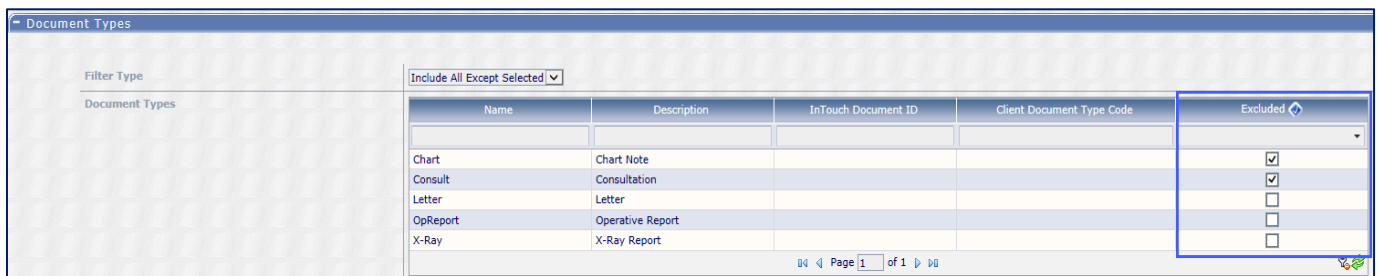
- Include All - Indicates no filter is applied. This example rule includes all Document Types.



- Include Selected - Displays a grid of specific items for a transcription component. Check the box to include one or more items in the rule.



- Include All Except Selected - is the mirror of Included Selected. Any boxes checked indicate the item(s) is excluded from the rule.



If filtering by STAT, there are three choices.

STAT Filter

STAT Filter

Include both STAT and non-STAT
 Include STAT
 Include non-STAT

+ Snippets

- Include both STAT and non-STAT – Indicates no STAT filter on the transcription rule.
- Include STAT – Indicates the rule only applies to transcriptions marked as STAT.
- Include non-STAT – Indicates the rule only applies to transcriptions not marked as STAT.

Filter Example

In the example below this rule will run when the document type is either a Chart and Letter and the Users are either Jay Wilson or Susan Stansfski.

Document Types

Filter Type: Include Selected

Name	Description	InTouch Document ID	Client Document Type Code	Included
Chart	Chart Note			<input checked="" type="checkbox"/>
Consult	Consultation			<input type="checkbox"/>
Letter	Letter			<input checked="" type="checkbox"/>
OpReport	Operative Report			<input type="checkbox"/>
X-Ray	X-Ray Report			<input type="checkbox"/>

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Users

Filter Type: Include Selected


First Name	Last Name	Username	Dial-in Dictation ID	Default Location	User Group	Included
Jay	Wilson	wel				<input checked="" type="checkbox"/>
Susan	Stansfski	sstansfs				<input checked="" type="checkbox"/>
Julie	Summers	jsummers				<input type="checkbox"/>
Alice	Noble	anoble				<input type="checkbox"/>
Philip	Bowers	pbowers				<input type="checkbox"/>

Page 1 of 1

+ Locations


+ STAT Filter


The column header of each Rule section (except STAT) can be clicked to sort the displayed data in ascending order (one click) or descending order (two clicks). You can also drag column headers to rearrange the column order of the display. The boxes under the column headers are filters to narrow what records are displayed. This is useful with larger numbers of document types, users, and locations to easily find items for the filter.

Name	Description	InTouch Document ID	Client Document Type Code	Included 
Chart	Chart Note			<input checked="" type="checkbox"/>
Consult	Consultation			<input type="checkbox"/>
Letter	Letter			<input checked="" type="checkbox"/>
OpReport	Operative Report			<input type="checkbox"/>
X-Ray	X-Ray Report			<input type="checkbox"/>

Page 1 of 1

In this example, the Description has been narrowed down by filtering with the letter “c”.

Include Selected 

Name	Description	InTouch Document ID	Client Document Type Code	Included 
	<input type="text" value="c"/>			
Chart	Chart Note			<input checked="" type="checkbox"/>
Consult	Consultation			<input checked="" type="checkbox"/>

Page 1 of 1

Adding Snippets

Add the Snippet test to the rule.

To Add the Snippet:

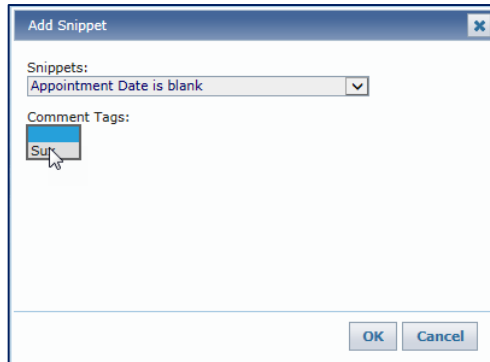
1. Use Add to open the Add Snippet window.

Snippets

	Name	Description	Comment Tag
No snippets yet.			



- In the Add Snippet window, select the Snippet to use for the rule. Select an optional comment tag. The comment tag is applied to the transcription when the snippet conditions are true.



- Click OK to add the snippet to the rule.

Use Add to add additional snippets if needed. Additional snippets can make the rule more targeted for more specific conditions.

Snippets		Name	Description	Comment Tag
	Edit Delete	Appointment Date is blank		
	Add			

Multi-Snippet Example

In the example below three snippets are tested on the transcription to check for:

- If the Appointment date is missing
- If Appointment Type field is not equal to C325
- If there is missing patient name and ID



Snippets		Name	Description	Comment Tag
	Edit Delete	Appointment Date Missing	Check if the appointment date is blank	t-Missing Demos
	Edit Delete	Appointment Type	Check if appointment type is not equal to C325	
	Edit Delete	Missing Patient ID/Name	Check for missing patient name and ID	t-Missing Demos
	Add			

If the Appointment Date Missing or the Missing Patient ID/Name snippet is true, the transcription will automatically get the comment tag. If the Appointment Type test is true and the other tests are false, then no comment tag is applied.

Use Edit to edit the snippet to change or remove a comment tag.

		Name	Description	Comment Tag
Edit Delete		Appointment Date Missing	Check if the appointment date is blank	t-Missing Demos

Use Delete to remove the snippet from the rule.

	Name	Description	Comment Tag
 	Appointment Date Missing	Check if the appointment date is blank	t-Missing Demos

Adding Actions

When a rule is triggered, that is when the Snippet test and rule conditions are met, the action will automatically apply to the transcription. The rule is run each time the transcription is uploaded, including when the job is delivered.

To add an action, check a box and/or add a comment tag, or use any combination of these as desired.

- Actions

Mark for QA	<input checked="" type="checkbox"/>
Mark for Review	<input type="checkbox"/>
Comment Tag	<input style="width: 100%;" type="text"/> ▼

+ Testing

– Mark Transcription for QA

- The job will be routed to the next QA level if there are additional QA levels defined for the client.
- Otherwise, the transcription is delivered to the client.

Note: If the MT has workflow override permissions and chooses to deliver to the client, the job will not be marked for QA, even if the rule is setup to do so and the rule is triggered; the comment tags will still be applied if they are on the rule and the activity log for the TID will indicate that a Validation Rule was triggered.

– Mark for Review

- The delivered transcription will be sent to the InQuery Review folder if:
 - The Review folder is enabled.
 - The Review folder has “Transcription Company Can’t Send to Folder” turned off.
 - The Location on the Transcription is enabled to go to the Review folder.
 - The Document Type on the Transcription is enabled to go to the Review folder.

Note: specific Comment Tags can be configured to force the Transcription to the Review folder when delivered.

– Comment Tag

- A Comment Tag can be defined on a Rule to be attached to the transcription when that Rule is Triggered.
- A Comment Tag can also be defined on a Snippet to be attached to the transcription when that Snippet is Triggered as part of a Rule. See [Adding Snippets](#) for additional information.
- You can search for specific Comment Tags in the Outstanding Jobs and Delivered Transcription screens.

Testing Rules

Rules can be tested using a Transcription ID.

The screenshot shows a 'Testing' window with a 'Transcription ID' field containing '132709182' and a 'test' button. Below the field is a 'Result' label.

The results from the test are used to ensure the rule is setup correctly.

	Filters	Value
✓	Document Type	Consult
✓	User	Robert Miller M.D.
✓	Location	Grand Rapids
✗	Stat	No
Matching Snippets		
Missing Patient ID/Name		
Actions		
No action will be taken because the transcription is not stat.		

Filters and Value: A green check next to the filter indicates the filter condition was met with the value from the transcription. A red check indicates the filter was not successful.

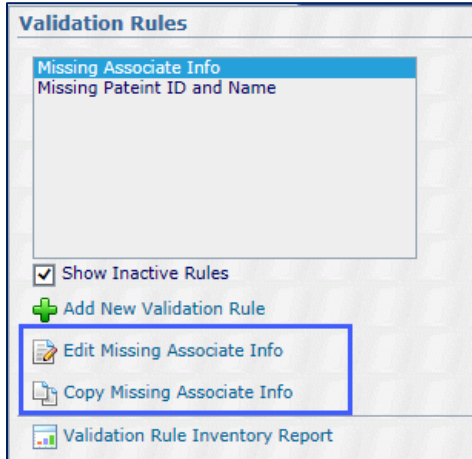
Matching Snippets: Indicates the Snippets that had matching conditions. If additional snippets were defined in the rule and do not show here, then those Snippet tests failed on the transcription.

Actions: Indicates which actions will be followed from the Action section of the rule.

- If the results are successful, a description indicates which action(s) are taken.
- If the results of the test are unsuccessful, a description indicates why the action is not taken.

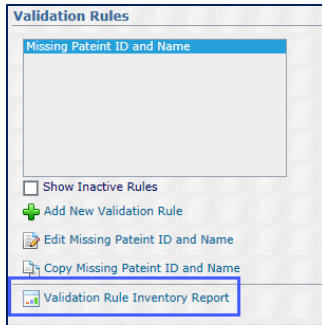
Edit and Copy Validation Rule

Use these functions to edit or copy existing rules.



Validation Rule Inventory Report

Run the Validation Rule Inventory Report to get a listing of all rules and their settings. The report is created as an excel file.



The screenshot shows an Excel spreadsheet with the following data:

Rule Name	Rule Active	Description	Document Type Filter	Document Types	User Filter	Users	Location Filter	Locations	Stat Filter	Snippets (Tags)	Action
Missing Associate	TRUE	Check for missing associate	Include Selected	Letter	Include All		Include All		Include All	Missing Patient ID/Name	
Missing Pateint ID and Name	TRUE	Check for missing patient id and/or name	Include Selected	Chart Note	Include All		Include All		Include All	Missing Patient ID/Name	Mark for Review

Best Practices

Building Snippets Best Practices

- Add a description when building snippets. This can be helpful when determining the conditions for the rule, especially when the snippet contains multiple tests.

Snippet.

The screenshot shows the configuration interface for a snippet. The 'Snippet Information' section includes a 'Name' field with the value 'Facility, Location, and Associate' and a 'Description' field with the text 'Check if Facility is missing and the Location contains "CRD" and Associate Count > 2'. A blue arrow points from the description field to the 'Snippet Definition' table below.

Action	And/Or	Field	Operator	Value
+ X		Facility	Is Missing	
+ X	And	Location Description	Contains	CRD
+ X	Or	Associate Count	Greater Than	2

Append New Snippet Clause

Validation Rule.

The screenshot shows the 'Edit Facility, Location, Associate Test Validation Rule' interface. A sidebar on the left contains expandable sections: Validation Rule Information, Document Types, Users, Locations, STAT Filter, and Snippets. The 'Snippets' section is expanded, showing a table with one entry:

	Name	Description	Comment Tag
Edit X Delete	Error Check	Check User Field 1 for the letter "e" or "E"	

Expand The Options

Snippets

+ Add

- When creating complex snippets that require multiple groupings with AND's and OR's, create each snippet OR clause as a separate group.

Action	And/Or	Field	Operator	Value
+ X		User Field 1	Equal To [Field]	Account Number
+ X	And	User Field 2	Is Missing	
+ X	Or	Account Number	Less Than	50000
+ X	Or	Patient ID	Is Missing	
+ X	And	Was Audio Played Back	Is False	
+ X	Or	Birth Date	Is Missing	
+ Append New Snippet Clause				

In the example above, the red, blue, green, and purple sections would be created as separate snippets.

The red section could be called User Field 1 and 2 test. The blue section could be called Account number test. The green section could be called Patient ID and Audio test and the purple section could be called the Birth Date test.

The snippet definitions for the two appear below.

User Field 1 and 2 test.

Snippet Information

Name: Test User Field 1 and 2 *

Description: If User Field 1 is equal to Account Number and User Field 2 is missing the snippet evaluates to true.

Snippet Definition

Action	And/Or	Field	Operator	Value
+ X		User Field 1	Equal To [Field]	Account Number
+ X	And	User Field 2	Is Missing	
+ Append New Snippet Clause				

Account number test.

Snippet Information

Name: Test Account number x *

Description: If Account Number is > 50000 the snippet evaluates to true

Snippet Definition

Action	And/Or	Field	Operator	Value
+ X		Account Number	Greater Than	50000
+ Append New Snippet Clause				

Patient ID and Audio test.

Snippet Information

Name: Test Patient ID and Audio *

Description: If Patient ID is missing and Was Audio Played Back is False the snippet evaluates to true

Snippet Definition

Action	And/Or	Field	Operator	Value
+ X		Patient ID	Is Missing	
+ X	And	Was Audio Played Back	Is False	

+ Append New Snippet Clause

Birth Date test.

Snippet Information

Name: Test Patient ID and Audio *

Description: If Patient ID is missing and Was Audio Played Back is False the snippet evaluates to true

Snippet Definition

Action	And/Or	Field	Operator	Value
+ X		Patient ID	Is Missing	
+ X	And	Was Audio Played Back	Is False	

+ Append New Snippet Clause

In the Rule they'd look like this:

+ Validation Rule Information

+ Document Types

+ Users

+ Locations

+ STAT Filter

Snippets

Snippets	Name	Description	Comment Tag
	Test Account number	If Account Number is > 50000 the snippet evaluates to true	
	Test Birth Date	If Birth Date is missing the snippet evaluates to true	
	Test Patient ID and Audio	If Patient ID is missing and Was Audio Played Back is False the snippet evaluates to true	
	Test User Field 1 and 2	If User Field 1 is equal to Account Number and User Field 2 is missing the snippet evaluates to true.	

+ Add

If either of these snippets evaluate to true and the other rule conditions were met the rule would trigger.

Common Snippet Setup Criteria

The table below shows the setup options for some of the most common snippets. Snippets are setup under Client Maintenance > Advanced Maintenance > Validation Rules > Snippet Builder.

Name	And/Or	Field	Operator	Value
DOS is blank <i>The date of service (DOS) is missing from the transcription.</i>	N/A	DOS	Is Missing	N/A
Patient ID is blank <i>The patient MRN is missing from the transcription.</i>	N/A	MRN	Is Missing	N/A
Account Number is blank <i>The Account Number is missing from the transcription.</i>	N/A	Account Number	Is Missing	N/A
Patient Name is blank <i>The patient name is missing from transcription.</i>	N/A	Last, First	Is Missing	N/A
Transcription has three or more blanks <i>The transcription body has one or more blank [fields] in it.</i>	N/A	Blank Bracketed Field Count	Greater Than	3
No Co-Signer <i>The transcription requires an additional authenticator or Co-Signer.</i>	N/A	Additional Authenticator Count	Equal To	1
Transcription Body Contains ampersand (&) <i>The transcription has ampersand character(s) in it.</i>	N/A	Body	Contains	&
Transcription Body contains backslash (\)	N/A	Body	Contains	\

<i>The transcription has backslash character(s) in it.</i>				
Transcription Body contains carat (^)	N/A	Body	Contains	^
<i>The transcription has carat character(s) in it.</i>				
Transcription Body contains pipe ()	N/A	Body	Contains	
<i>The transcription has pipe character(s) in it.</i>				
Transcription Body contains question mark (?)	N/A	Body	Contains	?
<i>The transcription has question mark character(s) in it.</i>				
Transcription Body contains tilde mark (~)	N/A	Body	Contains	~
<i>The transcription has tilde character(s) in it.</i>				
Transcription Body contains underscore (_)	N/A	Body	Contains	_
<i>The transcription has underscore character(s) in it.</i>				
MT did not listen to Audio	N/A	Was Audio Played Back	Is False	N/A
<i>The MT did not listen to any of the audio file the transcription.</i>				

Note: Some field names in the table above may not match your client. Certain field names can be modified per client requirements under Client Maintenance > Client Defaults, expanding the Demographic Field Labels section.

Example Validation Rule Setup

Setup Scenario: Three dictators always want the date of service on their transcription for Chart Notes and Consultations. That is, unless they mark it as STAT. Then they want the transcription delivered to their Preliminary folder as soon as possible. If the job is not a STAT and date of service is missing mark the job for QA and Review.

Here is how the rule should be setup for the above scenario.

Validation Rule Information

Name	Appointment Date except if STAT *
Description	Check Chart and Consultation. If users are Susan Stansfski OR Julie Summers OR Alice Noble AND Location is North Side AND then mark job for review and QA, UNLESS the job is a STAT.
Rule Active	<input checked="" type="checkbox"/>

Document Types

Filter Type	Include Selected																														
Document Types	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Description</th> <th>InTouch Document ID</th> <th>Client Document Type Code</th> <th>Included</th> </tr> </thead> <tbody> <tr> <td>Chart</td> <td>Chart Note</td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Consult</td> <td>Consultation</td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Letter</td> <td>Letter</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>OpReport</td> <td>Operative Report</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>X-Ray</td> <td>X-Ray Report</td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Name	Description	InTouch Document ID	Client Document Type Code	Included	Chart	Chart Note			<input checked="" type="checkbox"/>	Consult	Consultation			<input checked="" type="checkbox"/>	Letter	Letter			<input type="checkbox"/>	OpReport	Operative Report			<input type="checkbox"/>	X-Ray	X-Ray Report			<input type="checkbox"/>
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Locations

Filter Type	Include Selected																				
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STAT Filter

STAT Filter	Include non-STAT
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Snippets

Name	Description	Comment Tag
Appointment Date is blank		

Actions

Mark for QA

Mark for Review

Comment Tag

Common Validation Rule Setup Scenarios

Validation rules are setup under Client Maintenance > Advanced Maintenance > Validation Rules > MT Rules.

Validation Rule Information

Name: No ADT *

Description: Verify if account number, patient name, and patient ID are blank. If any are true mark for QA and add the No ADT comment tag.

Rule Active:

+ Document Types

+ Users

+ Locations

+ STAT Filter

Snippets

Name	Description	Comment Tag
Account Number is Blank	Account Number is Blank	Missing Account Number
Patient Name Is Blank	Patient Name Is Blank	Missing Patient Name
PatientID Is Blank	PatientID Is Blank	Missing PatientID

Actions

Mark for QA

Mark for Review

Comment Tag: Missing ADT

The table below shows the setup options for the snippets and actions. Because setup for Document Types, Users, Locations, and STATs are specific to client requirements they are not listed in the table.

Rule: No ADT			
Snippet	Comment Tag	Action	Comment Tag
Account Number is Blank Patient Name is Blank Patient ID is Blank	N/A	Mark for QA	Missing ADT
Rule: No DOS			
Snippet	Comment Tag	Action	Comment Tag
Date of Service Field is Blank	N/A	Mark for QA Mark for Review	No DOS
Rule: Transcription Body Has Blanks			
Snippet	Comment Tag	Action	Comment Tag
Transcription Body Has 3 or More Blanks	N/A	Mark for QA Mark for Review	Blanks
Rule: No Co-Signer			
Snippet	Comment Tag	Action	Comment Tag
Require and Additional Authenticator	N/A	Mark for QA Mark for Review	Additional Signature not dictated
Rule: Transcription Body Contains Special Characters			
Snippet	Comment Tag	Action	Comment Tag
Transcription Body contains ampersand (&) Transcription Body contains backslash (\) Transcription body contains carat (^) Transcription Body contains pipe () Transcription Body contains question Mark (?) Transcription body contains tilde (~) Transcription body contains underscore (_)	N/A	Mark for QA	Body Contains Special Characters