# User's Manual

WebChartMD
P.O. Box 6154
Johnson City, TN 31604
1-877-302-9263

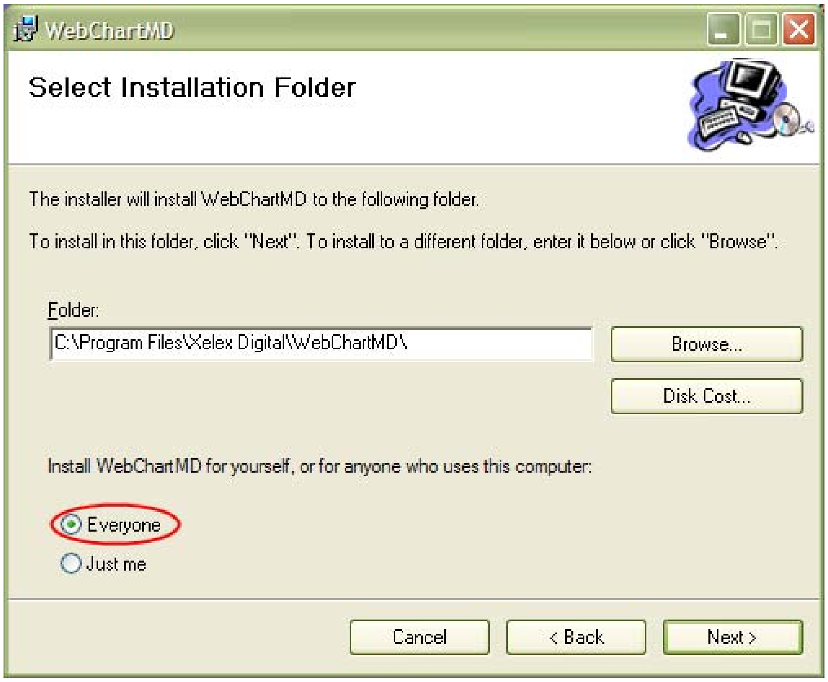
# Setting up the WebChartMD System

## *Installing the Care Provider Desktop Client*

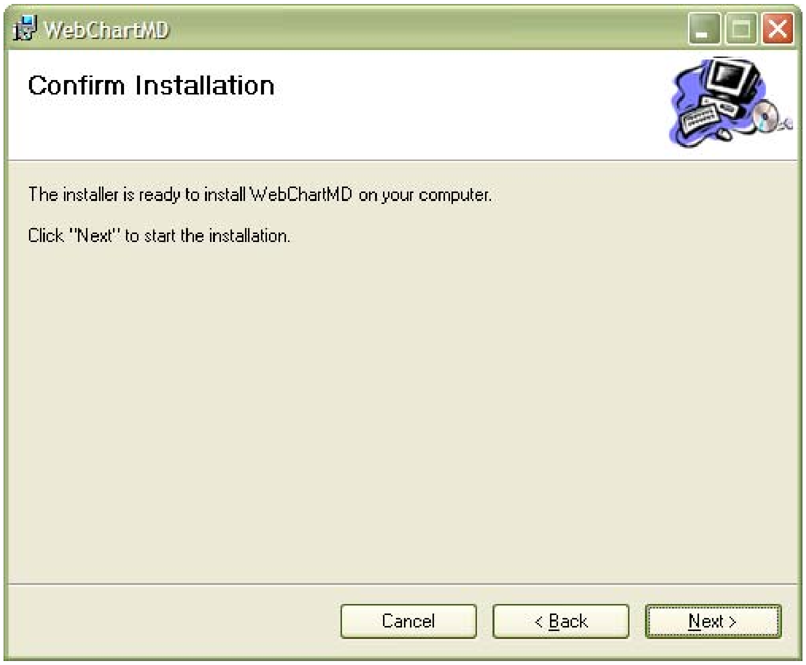
1. Locate the installer program for WebChartMD. Once the installer has been located double click it to activate the installation process.
2. When the installer launches click the "Next" button


3. Make sure to read the EndUserLiscenseAgreement and if it is agreeable select the "I Agree" then click the "Next" button.

4. If the program needs to be installed for all users on the current computer be sure to click the button labeled "Everyone" before clicking the "Next" button to continue with the installation.




5. Click the "Next" button to begin the installation



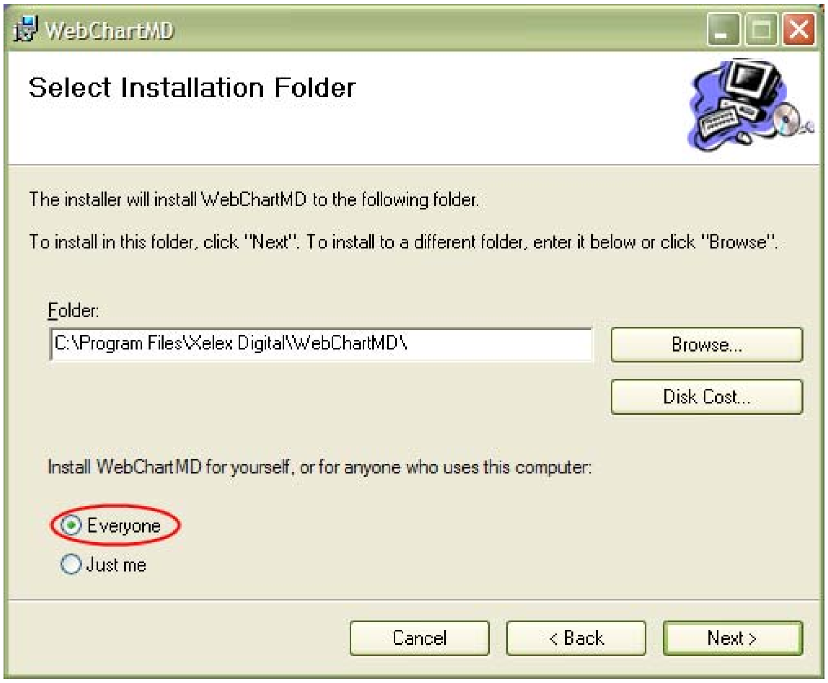
6. When the installation finishes click the "Close" button to complete the installation process.

## ***Installing the MLS desktop client***

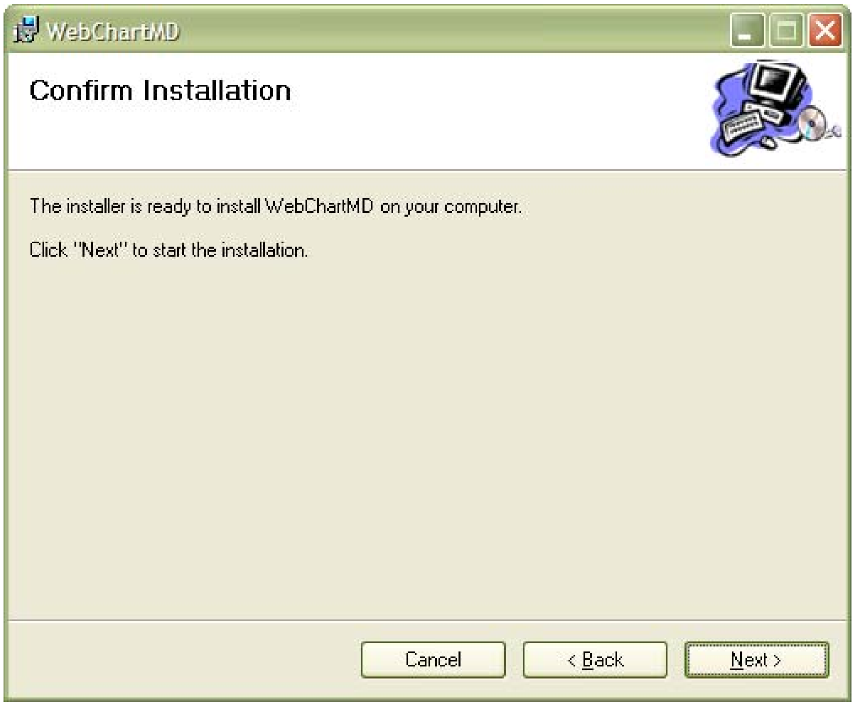
1. Locate the installer program for WebChartMD. Once the installer has been located double click it to activate the installation process.
2. When the installer launches click the "Next" button


3. Make sure to read the EndUserLiscenseAgreement and if it is agreeable select the "I Agree" then click the "Next" button.

4. If the program needs to be installed for all users on the current computer be sure to click the button labeled "Everyone" before clicking the "Next" button to continue with the installation.




5. Click the "Next" button to begin the installation



6. When the installation finishes click the "Close" button to complete the installation

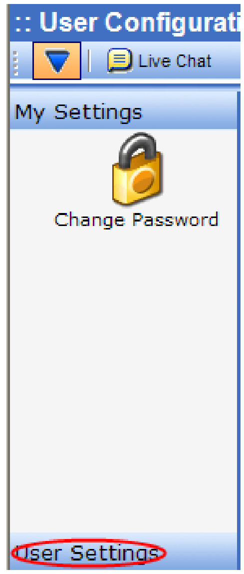
## ***Setting up user accounts***

To change any web portal setting, first log in to an account via the web portal by going to "www.webchartmd.com" and clicking on the "LOG IN" button.


Then on the next page, type a username and password into the fields and click the "Submit" button. If done successfully the view will change and the web portal will now be displayed with the username displaying near the top of the page.

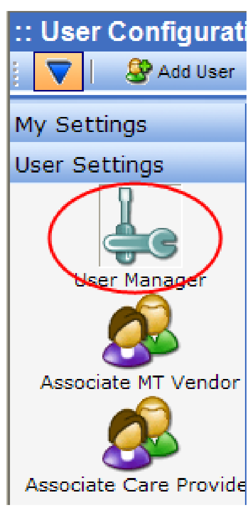

Upon successful log-in look to the top right hand corner. There will be a link that says "Settings"- click that link.

On the next page, look to the very bottom left corner. There is a tab called "User Settings". - Click that tab. The menu that will allow changes to be made to user settings/preferences is now visible.



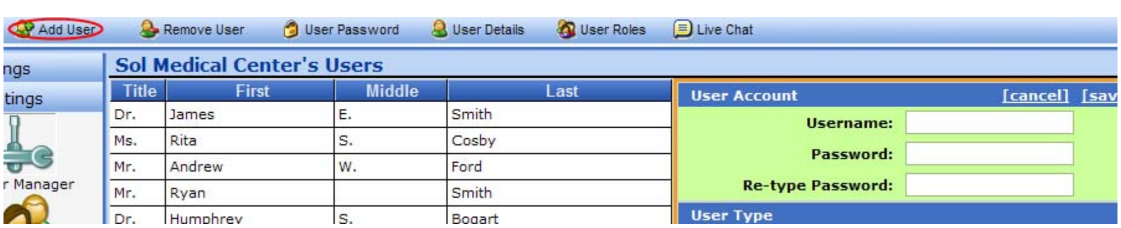

## - For Care Provider Office Managers

For settings A-E, click the "User Manager" button. For setting F, click the "Associate MT vendor" button. For setting G, click the "Associate Care Provider" button




## a. Adding Users

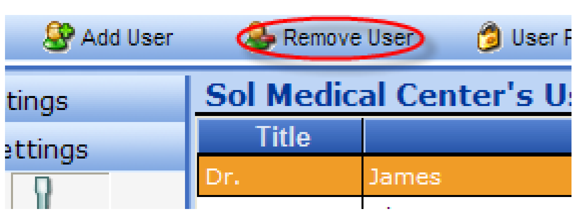
To add a user click the "Add User" button and a sidebar will display in the main window.



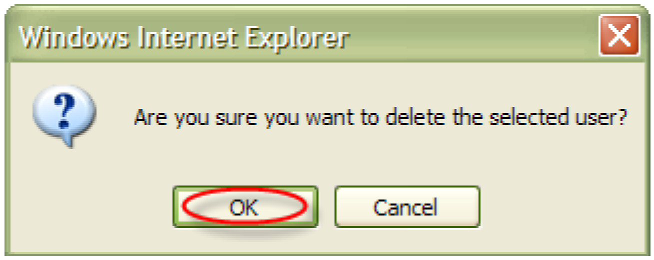
In the sidebar all the information for the new user can be set. The required fields are the username, password, first name, last name, and e-mail fields when creating a new user. Once all the information to be included in the new user account has been entered, press the “save” link. When you have pressed the save link a small red bar with the text “Changes were saved successfully” should display above where you clicked “save”.


## b. Removing Users

First make sure that no pop-up blocking software is enabled. To remove one or more users select one line or several lines and click the “Remove User” button.



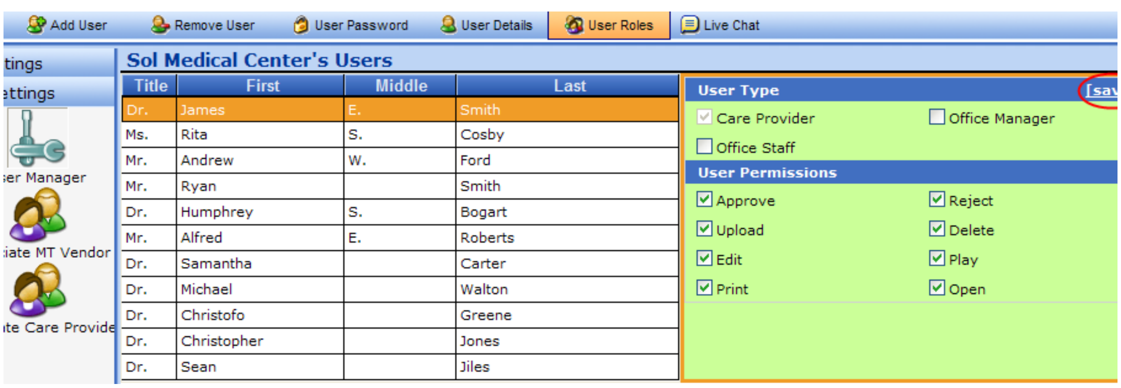
When the "Remove User" button is clicked a pop-up asking for confirmation that the selected users should be deleted will be displayed.  Click the "OK" button to complete removing the user profiles.




## c. Changing user Roles

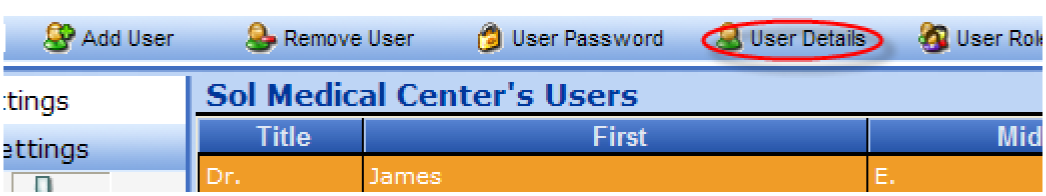
Select one user and click the "User Roles" button. A sidebar that allows information to be entered for the permissions of the user should display on screen.


Once the changes to the permissions have been set click the "save" link and the permissions are updated.  NOTE: once a user has been made a care provider this cannot be undone.

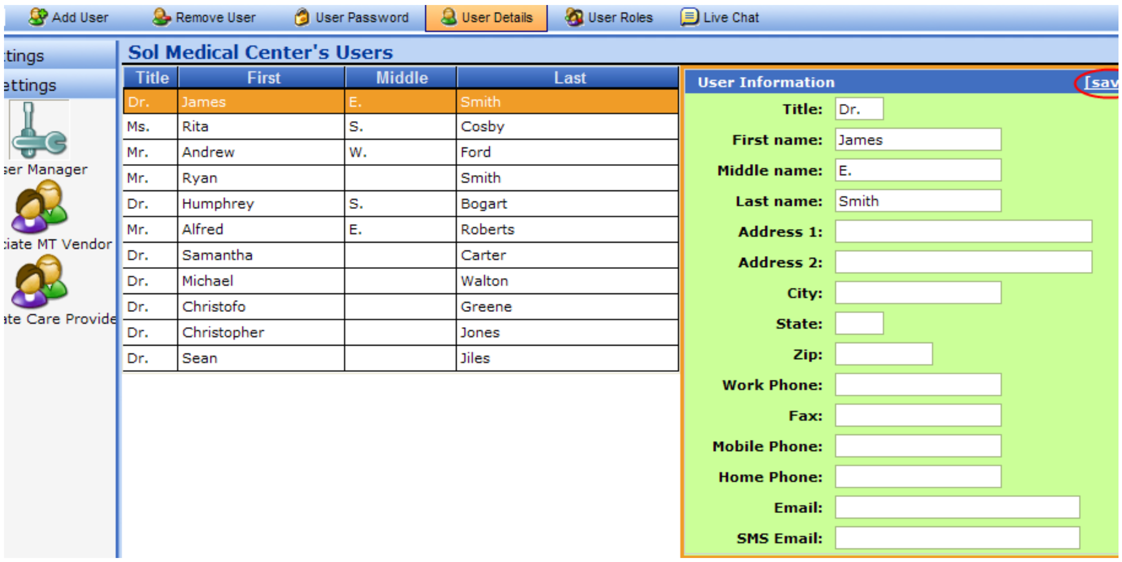



## d. Changing user Details

To change user details select one user and then click the "User Details" button.  A sidebar should open showing the options for adding/updating user information.

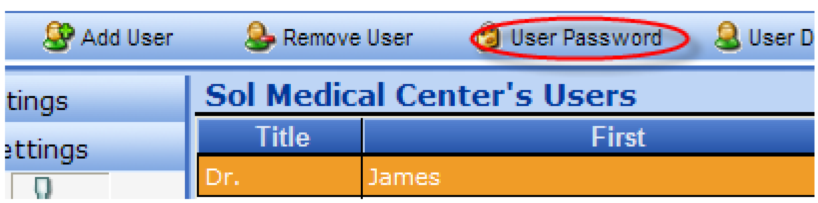


Once the desired information has been changed/added click the “save” link and the information will be updated.

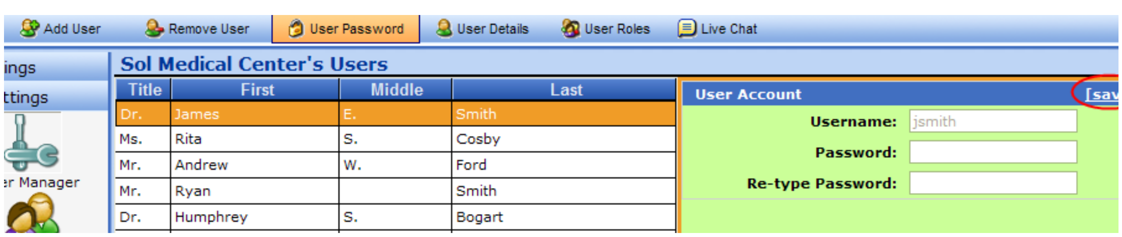



## e. Changing a user Password

To change a user password select a single user and then click the “User Password” button. When the button is clicked a side bar will display that allows the user’s password to be changed.

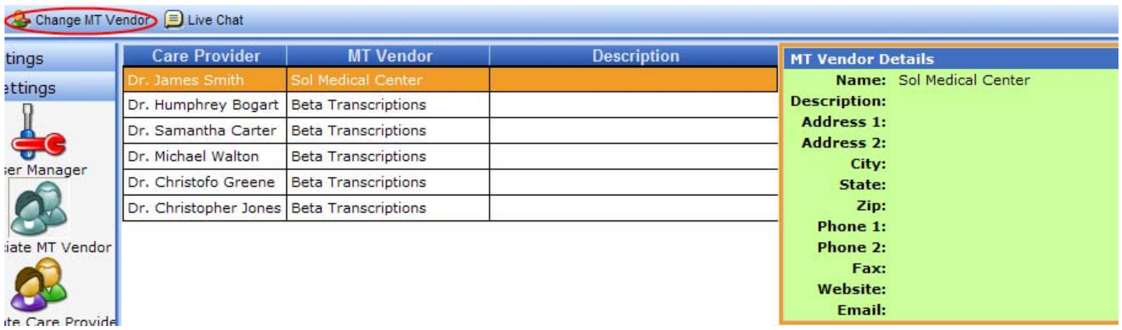



Once the password has been changed click the “save” button to update the user’s password.

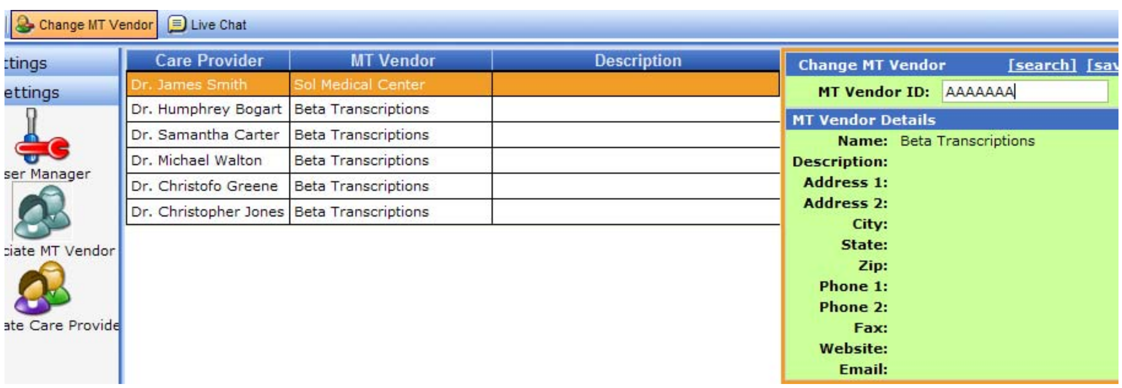


## f. Associating a care provider to a MT vendor

When a care provider account is first created a MT vendor association must be made in order for the care provider to be able to upload documents. By following these instructions it is also possible to change a care provider's default MT vendor routing. First make sure that no pop-up blocking software is enabled. Second make sure that the "Associate MT Vendor" button is selected on the left hand side. Once the first steps are completed, select a care provider in the left hand side column and click the "Change MT Vendor" button.

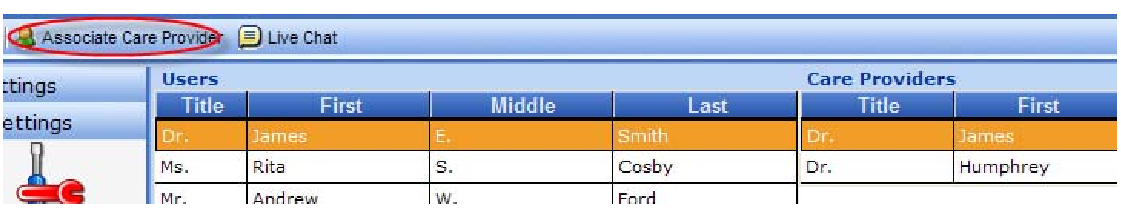



The Care Provider office is provided with codes for the MT vendors that they are set up to work with. In the sidebar that comes up a value may be entered. Enter the code from the WebChartMD staff for the MT vendor and click the "search" link to confirm that it is the correct MT vendor. Once the correct MT vendor is located click the "save" link.

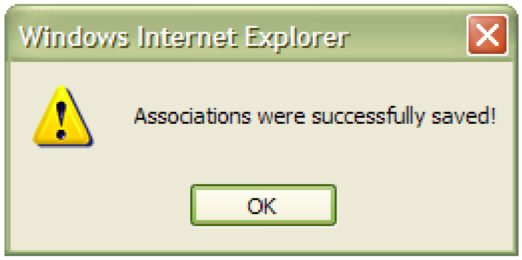



## g. Setting CP visibility

First make sure that no pop-up blocking software is enabled. Second make sure the "Associate Care Provider" option on the left hand side is selected. Once a user is selected select one or more care providers in the second column to allow that user to see the selected care provider's folders. When the selection is completed click the "Associate Care Provider" button in the main menu.

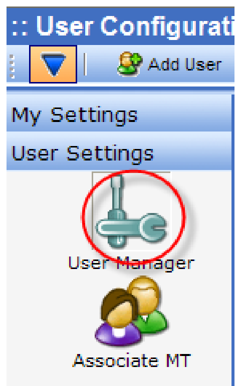


Once the "Associate Care Provider" button is clicked there will be a pop-up notification saying that the association was successful.




## - For MT Vendors

For settings A-E click the "User Manager" button. For setting F, click the "Associate MT" button.

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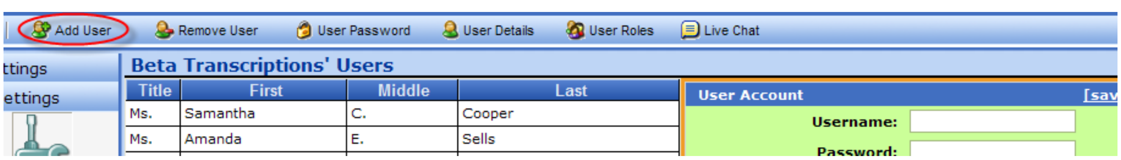
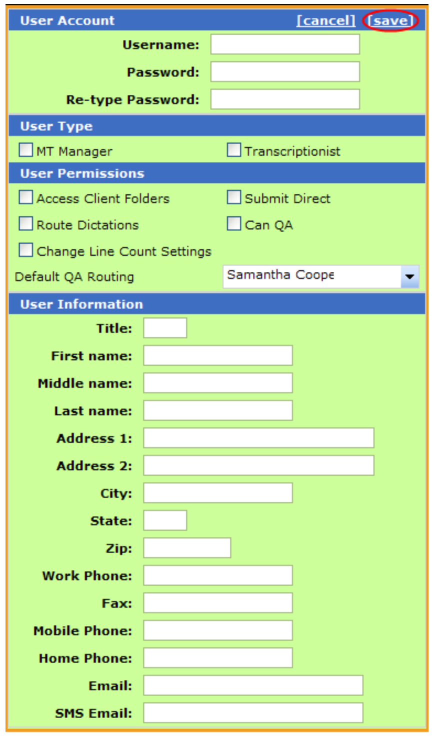
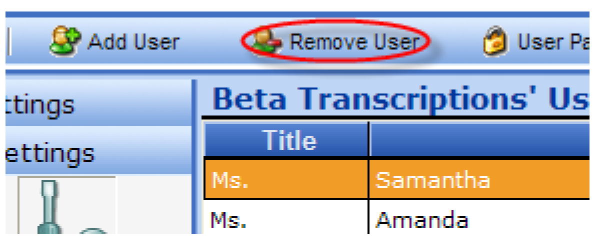


In the sidebar all the information for the new user can be set. The required fields are the username, password, first name, last name, and e-mail fields when creating a new user. Once all the information to be included in the new user account has been entered, press the “save” link.

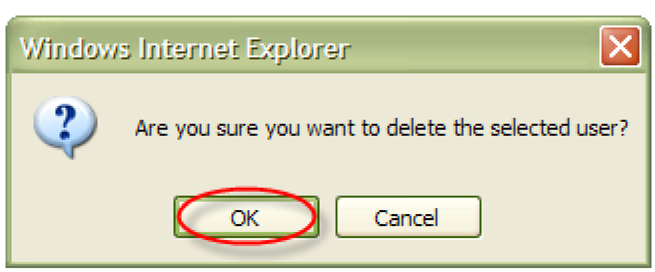



## b. Removing Users

First make sure that no pop-up blocking software is enabled. To remove one or more users select one line or several lines and click the “Remove User” button.

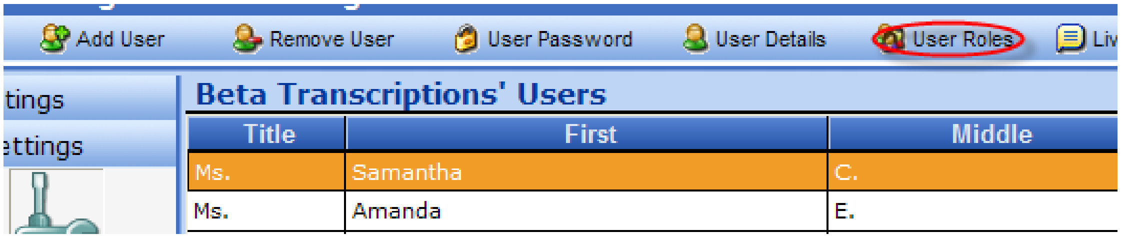



When the “Remove User” button is clicked a pop-up asking for confirmation that the selected users should be deleted comes up. Click the “OK” button to complete removing the profiles.

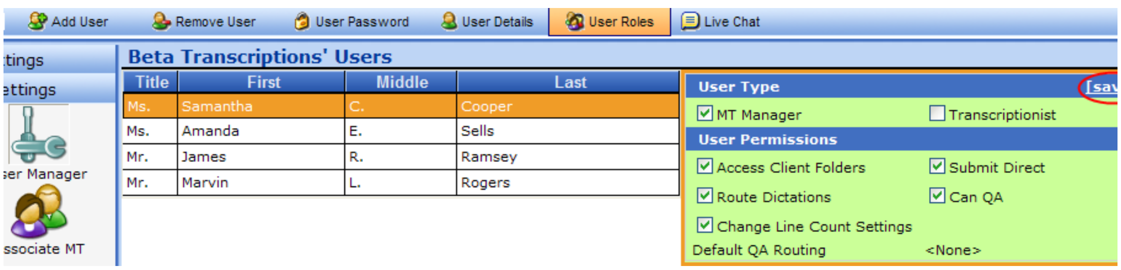


## c. Changing User Roles

Select one user and click the "User Roles" button a sidebar that allows information to be entered for the permissions of the user should display on screen.

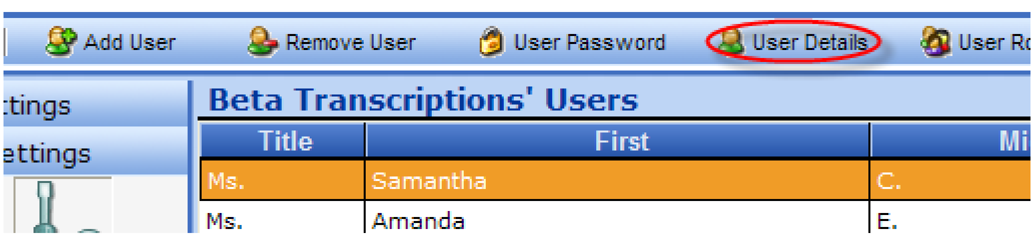



Once the changes to the permissions have been set click the "save" link and the permissions are updated.

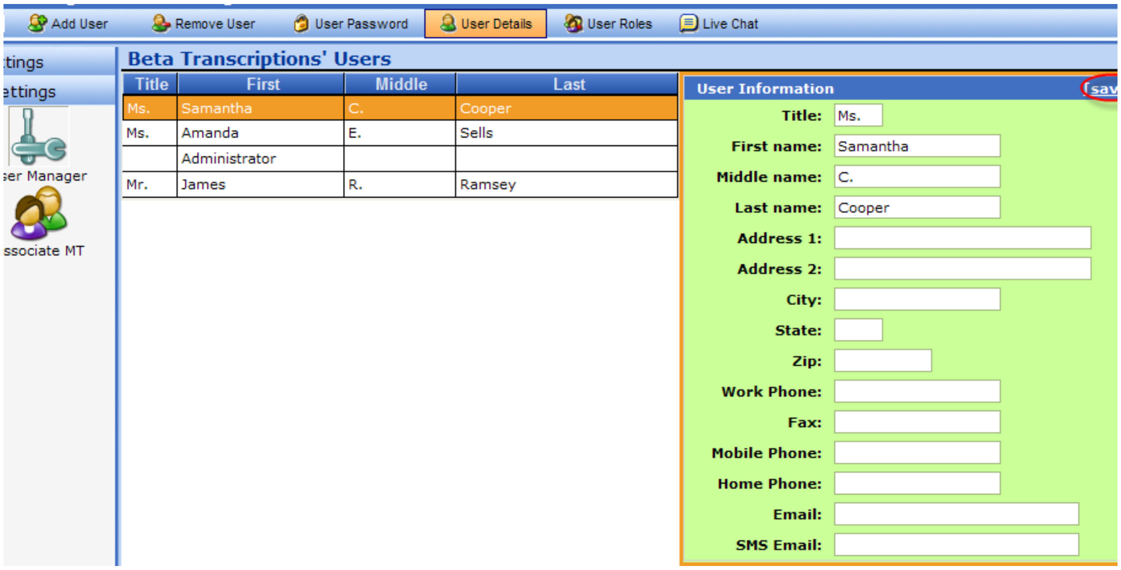



## d. Changing User Details

To change user details select one user and then click the "User Details" button. A sidebar should open showing the options for adding/updating user information.

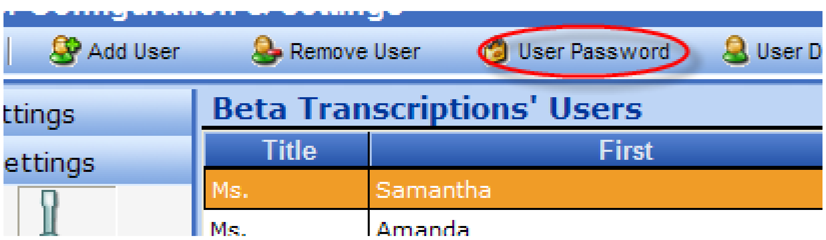


Once the desired information has been changed/added click the "save" link and the information will be updated.

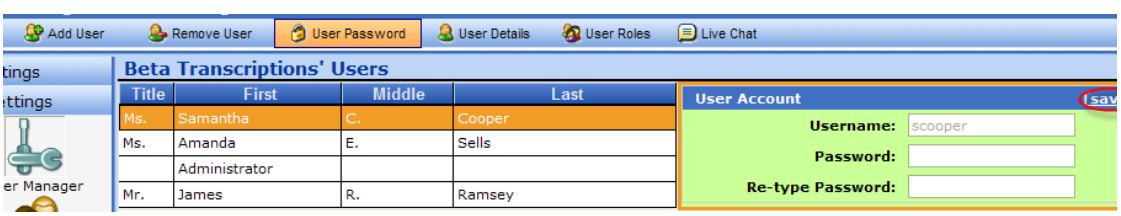



## e. Changing a User Password

To change a user password select a single user and then click the "User Password" button. When the button is clicked a side bar will display that allows the user's password to be changed.

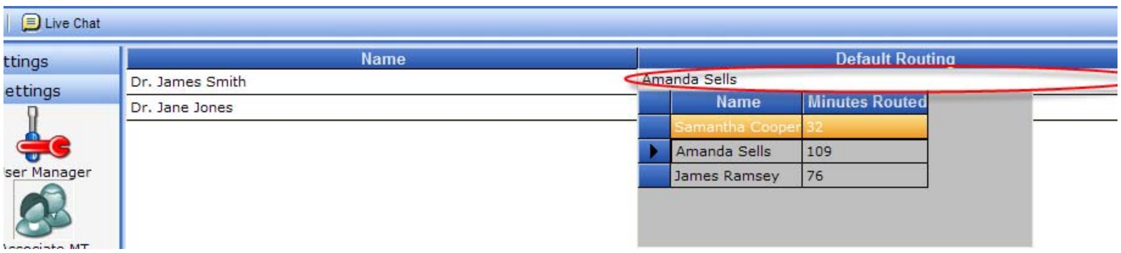



Once the password has been changed click the "save" button to update the user's password.



## f. Setting Default Dictation Routing

First make sure that no pop-up blocking software is enabled. Second make sure the "Associate MT" option is clicked. Once a care provider is selected, click on the field with the MLS name in it. After that field is clicked, a drop down menu will appear with all the MLS's available to choose from. Once the MLS that needs to be associated has been clicked that MLS will then be routed any new documents received from that care provider.

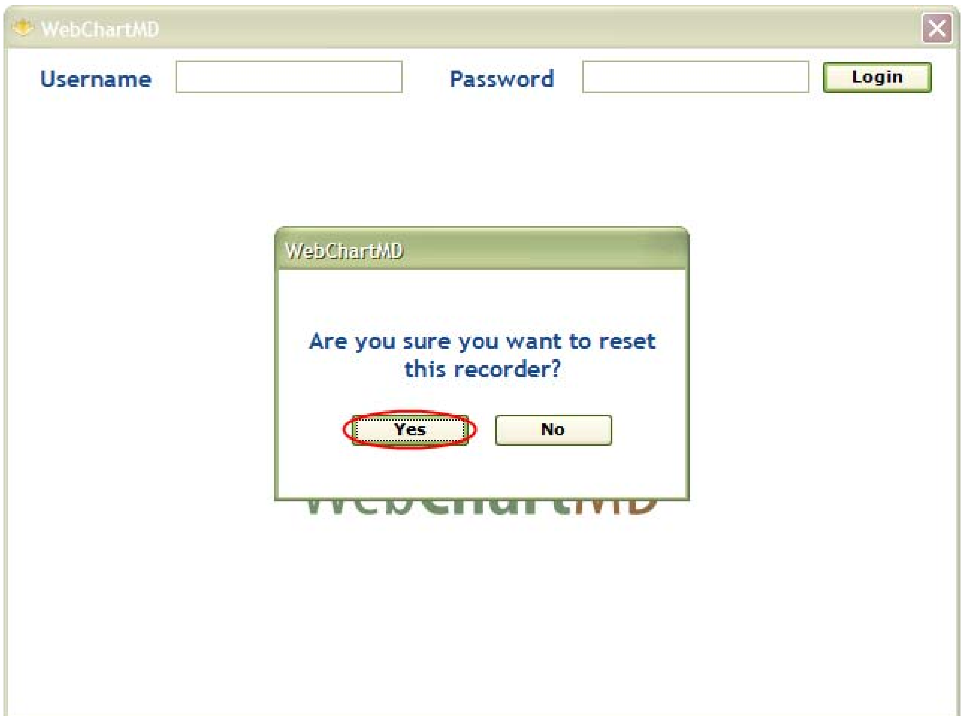


# Using WebChartMD – For the Care Provider

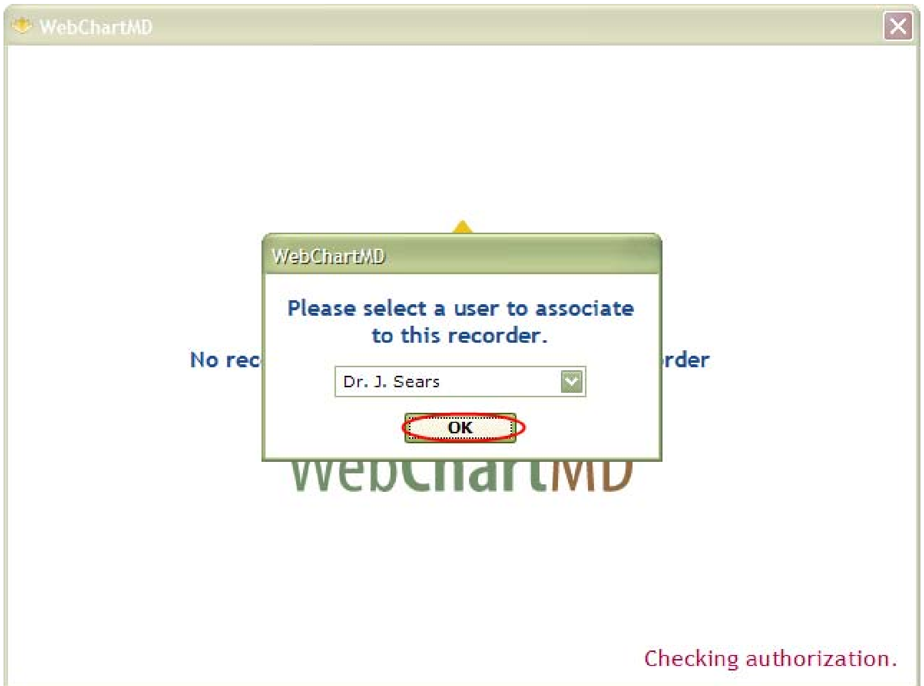
## ***Authorizing recorders for care providers***

1. Open WebChartMD by double-clicking the desktop icon named "WebChartMD" or by accessing the start menu, click all programs, and then "WebChartMD". Next, click the "WebChartMD" icon in that directory

2. Make sure that an Olympus™ DS-330 or DS-2 Digital Voice Recorder is plugged in to the computer. Press Alt+r on the keyboard. Select "Yes" when the prompt comes up. NOTE: the window will close itself.



3. After clicking yes the prompt will go away. Enter a username and password and click the "Login" button to continue assigning the recorder to a new care provider This time a new prompt will come up allowing the recorder to be associated to a Care Provider profile. Select the care provider that needs to be associated to this recorder by clicking on the arrow beside the name. A drop down list will display. Once the drop down list is visible select the appropriate care provider and clicking the "OK" button. When completed, the upload will continue normally.

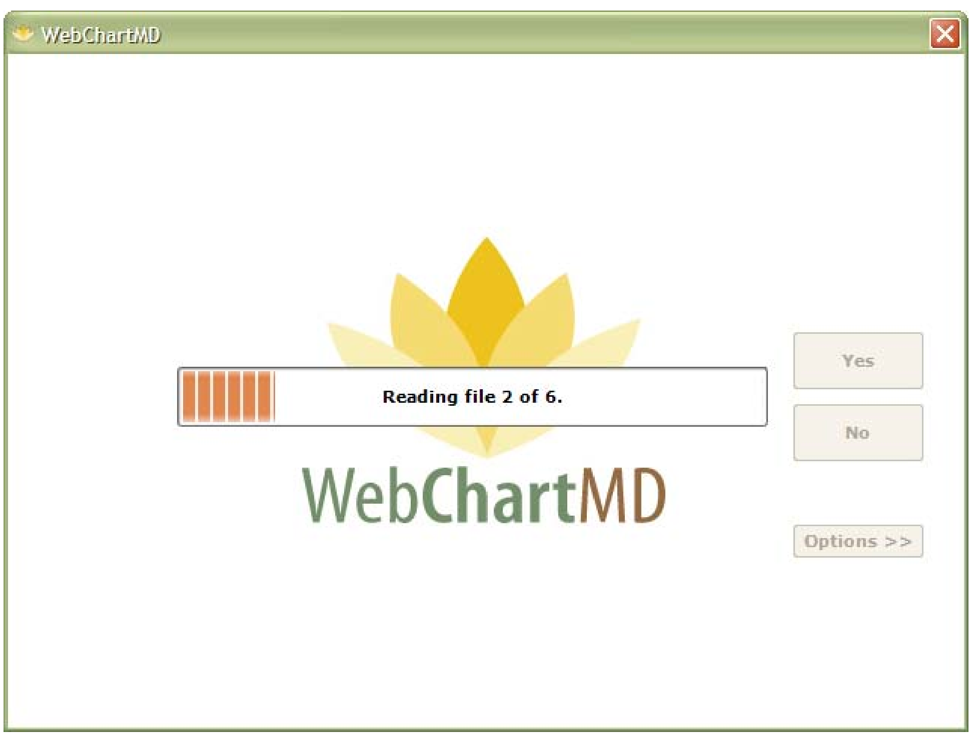



## ***Uploading Dictations***

1. Open WebChartMD by double-clicking the desktop icon named "WebChartMD" or by accessing the start menu, click all programs, and then "WebChartMD". Next, click the "WebChartMD" icon in that directory.

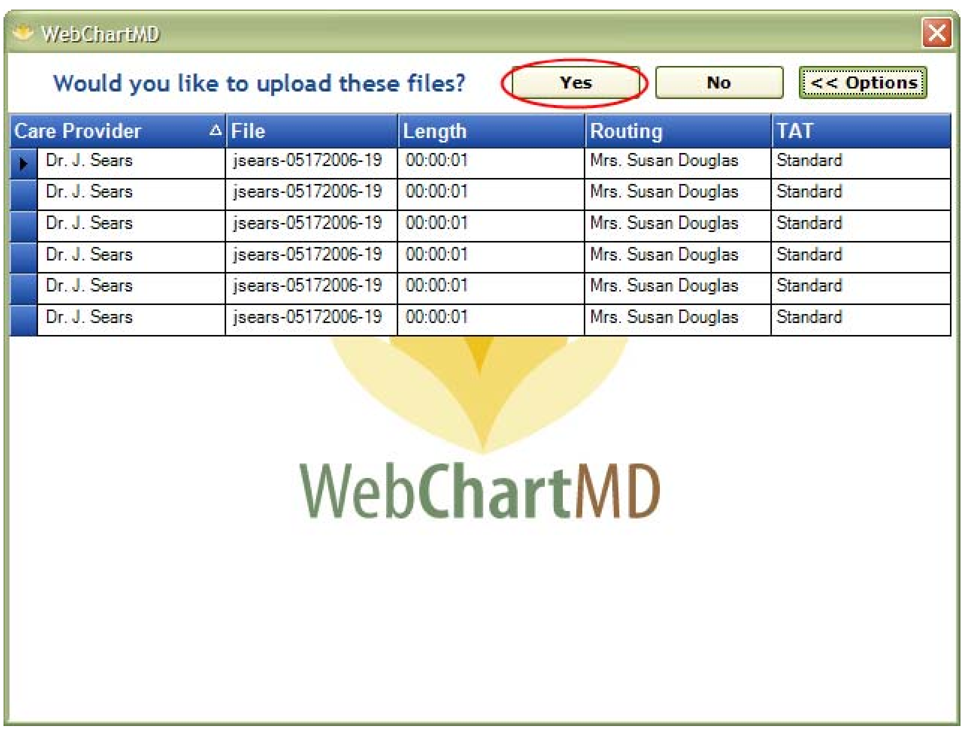
2. Make sure that an Olympus™ DS-330, DS-2300, DS-3000 , DS-4000 or DS-2 Digital Voice Recorder is plugged into the computer and then enter a username and password in the appropriate fields. Once the username and password has been entered press the "Login" button. NOTE: if a Digital Voice recorder has not been plugged in then an error message will display.


3. Once the user has logged in successfully the file on the recorder will be read.



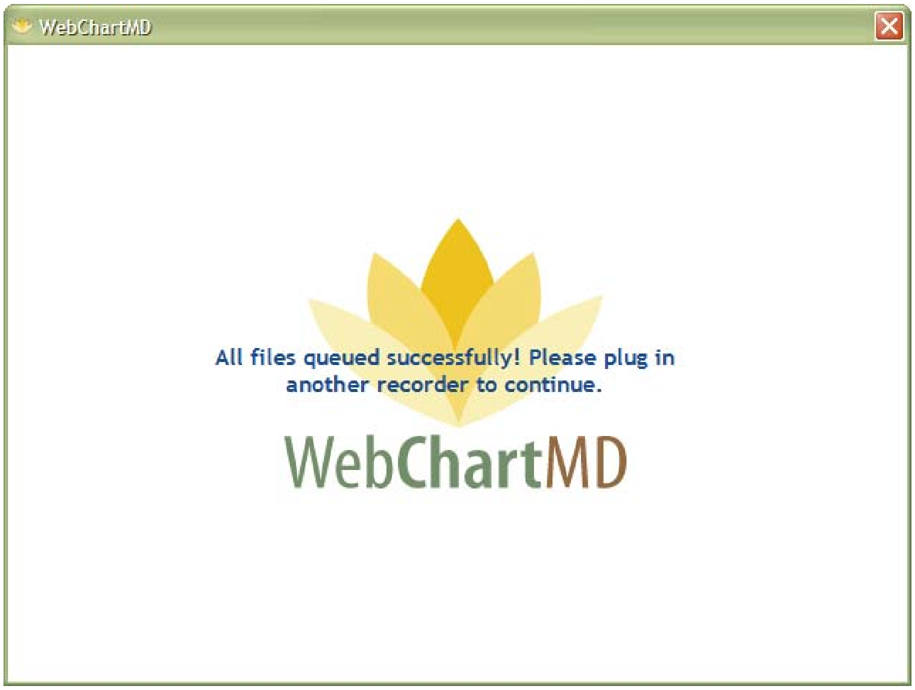
4. If steps 1 and 2 have been executed properly then this screen should display:


5. If the "Yes" button is clicked the files that are currently on the recorder will be uploaded without any specific settings alternatively the "Options" button can be clicked for more advanced uploading capabilities. If the "Options" button is clicked a screen similar to the one below will be displayed.



The recordings can be sorted by any of the headings and the "Routing" (where the document will go) or the "TAT" (turn around time) can be changed by clicking inside the respective field for that document. If either the "Routing" or the "TAT" fields are clicked a drop down list will be displayed that will allow options to be set for the respective field.

6. Once all the option selections are made the files can be uploaded using the "Yes" button. If everything above has been executed properly a screen similar to the one below should display.
   If more files from another recorder need to be uploaded then another recorder can be plugged in at this time. Once another recorder is plugged in you can repeat steps 3-6 to upload more documents. If all desired files have been uploaded close the application window. The client will upload the files while another recorder is being read.



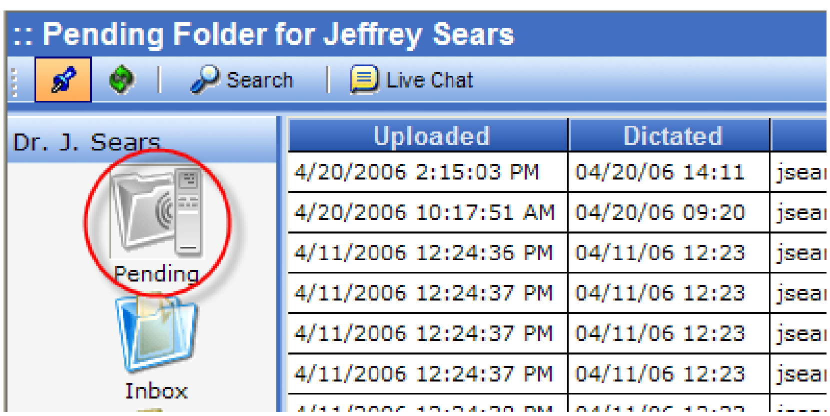

## Opening the Web Portal

Go to "www.webchartmd.com" and click on the "LOG IN" button.

On the next page type a username and password into the fields and click the "Submit" button. If done successfully the view will change. Now the web portal will be in view with the username displaying near the top of the page.


## - The Pending Folder

This folder holds all the audio files that have been uploaded to the server and allows information about those files to be viewed- such as the routing information.

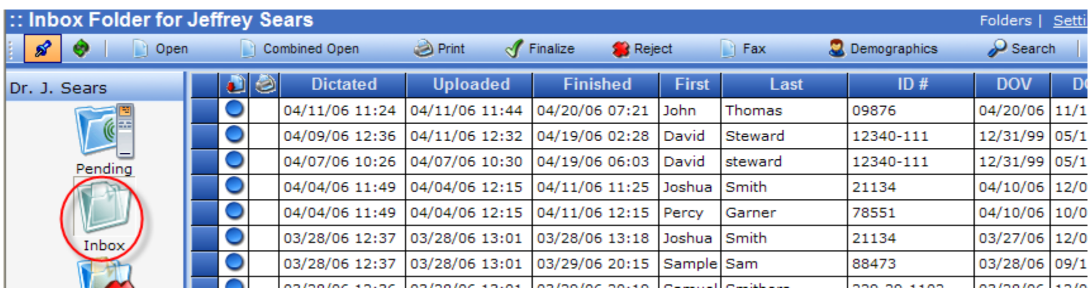


## a. Searching for a Document

To search for a document click the “Search” button on the main menu and enter the parameters to use. Once either a filename or a routing destination has been entered click the “Search” button.

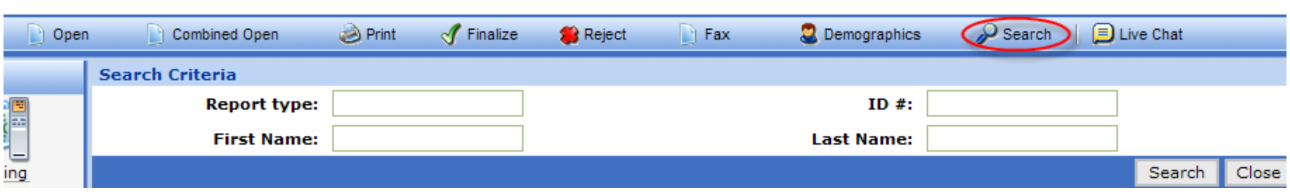

## - The Inbox Folder

This folder contains all the items that have been received from transcriptionists. In this folder view the date when the transcription was dictated, uploaded, and when the file was received from the transcriptionist can all be seen. Also the patient’s demographics for any specified file can bee seen and are searchable using the “Search” button at the top of the screen. There is also a field indicating the report type. Once a report is considered to be in its final form the “Finalize” button can be clicked and that listing will be sent to the final folder. The first column on the left hand side indicates whether a listing has been opened and the second column indicates whether a listing has been printed.



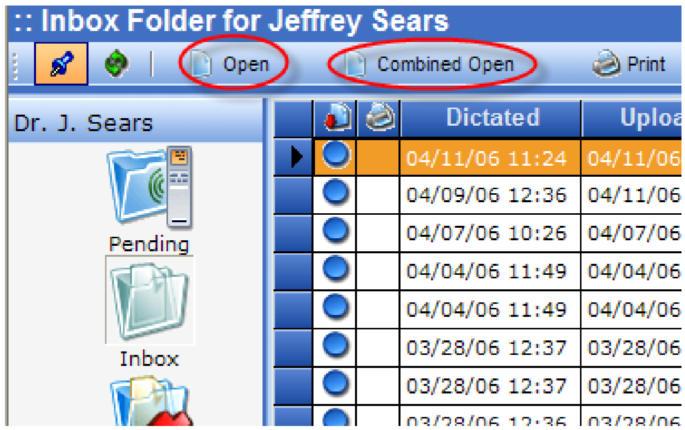

## a. Searching for a Document

To search for a document click the “Search” button on the main menu and enter the parameters to be used. Once either a report type, first name, ID#, or last name have been entered press the “Search” button.



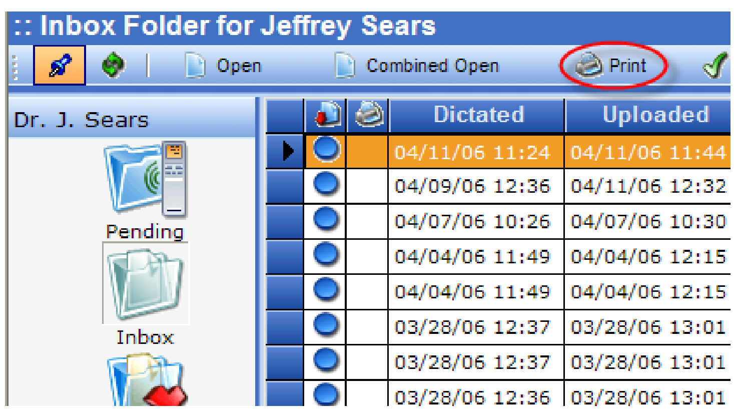
## b. Opening a Document

By selecting a single line or multiple lines files can be opened. If the standard open feature is used by clicking the "Open" button each document will be opened in Microsoft Word. If multiple documents are selected and the "Open" button is clicked, all selected documents will open at the same time as different word documents. By selecting multiple documents and clicking the "combined open" button the selected documents are turned into one large document and opened in Microsoft Word.



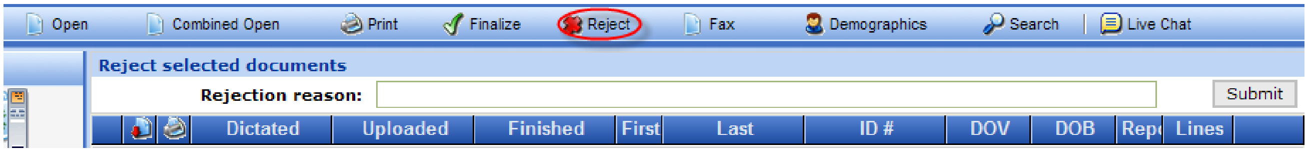

## c. Printing a Document

By selecting a single line or multiple lines, or by either control clicking them or shift clicking them, the files can be printed. The files will be sent to the last printer that was used with Microsoft Word.



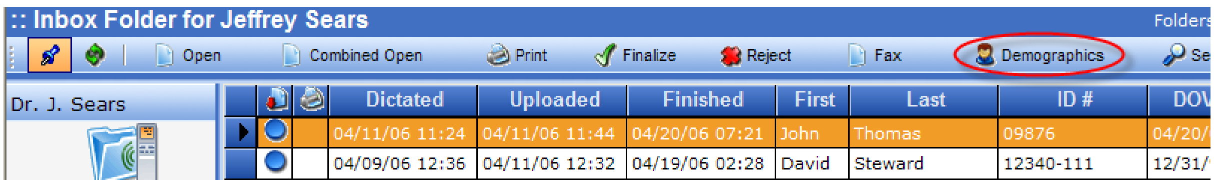
## d. Rejecting a Document

To reject a document click the "Reject" button then a small prompt will come up asking for the rejection reason. A rejection reason must be entered before a document can be rejected. Once a rejection reason has been entered click the "submit" button.

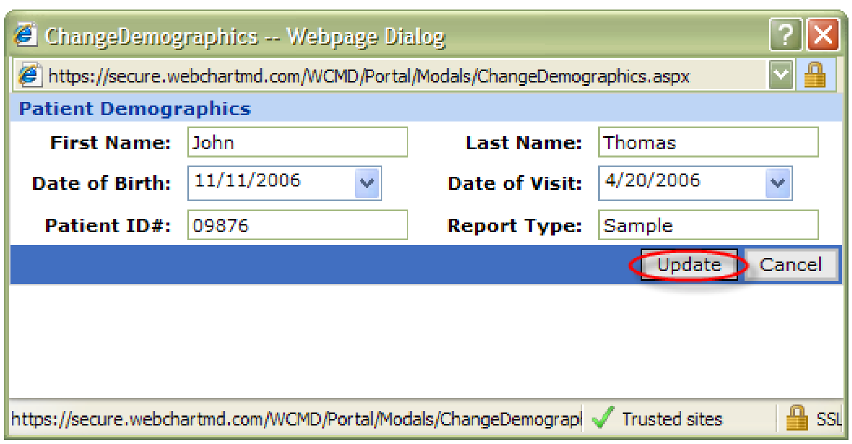



## e. Updating/Changing Demographics

First make sure that no pop-up blocking software is enabled and that a line is selected, then click the "Demographics" button.

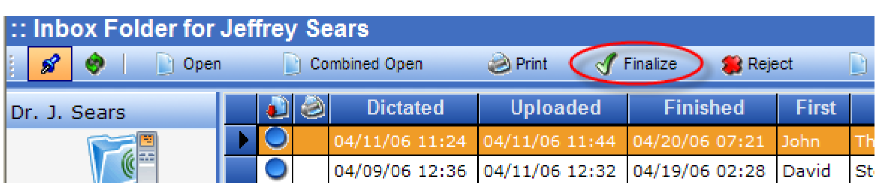



When the button is clicked a pop-up box will prompt for a change to the demographic information associated with that file. After the information has been changed click the "Update" button.

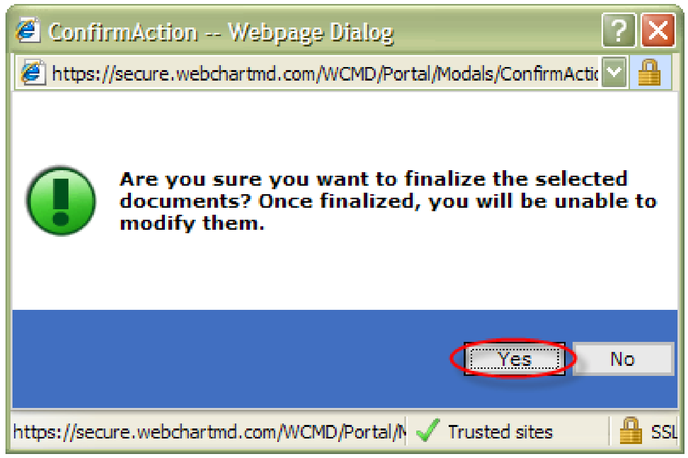



## f. Finalizing a Document

To finalize a document first make sure that no pop-up blocker software is enabled and that a line is selected. When both of these are done all click the "Finalize" button.

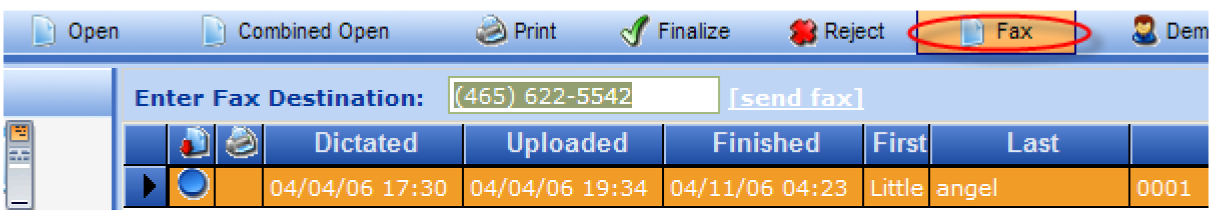


A pop-up will appear asking for confirmation that the document is ready to be finalized and made read only. Click "Yes" at this prompt to finalize the document.

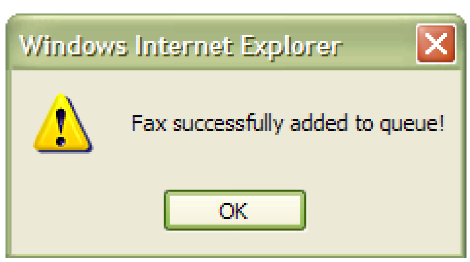



## g. Faxing a Document

First in order to fax a document make sure that no pop-up blocking software in enabled. Then select the documents that need to be faxed and click the "Fax" button.




Once the files that need to be faxed have been selected, a fax number has been entered and the "Send Fax" link has been clicked a pop-up notification will come up. This pop-up states that the document has been added to the fax queue. To close the notification window click the "OK" button.



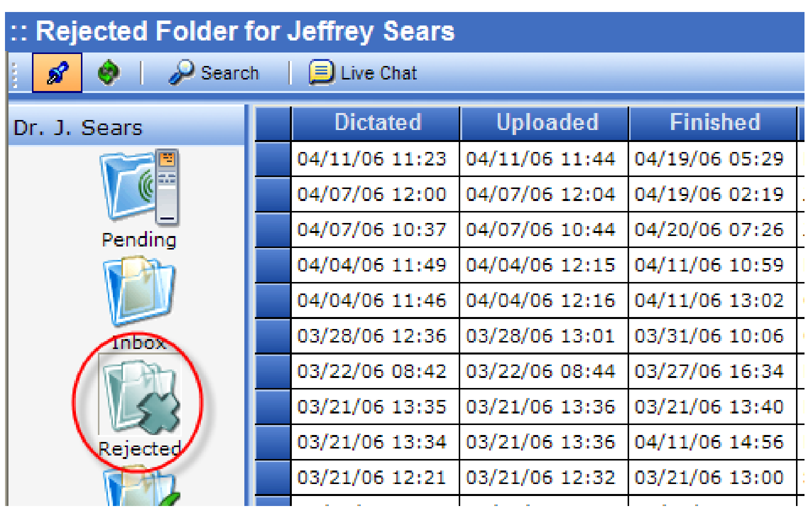

## h. Viewing the document Audit trail

First make sure that the folder currently being viewed is the inbox and that no pop-up blocking software is enabled. Once you have found a file that needs to be audited click the 3rd icon to the right in the final column of information. The icon will look like a planet. A pop-up will display giving you detailed information about when a document was saved, opened, etc.


| ploaded | Finished | First | Last | ID # | DOV | DOB | Report Type | Lines |
|---|---|---|---|---|---|---|---|---|
| 6/06 21:21 | 06/30/06 01:29 | Emerald | Green | 1005 | 06/29/06 | 11/27/98 | Surgical Note | |
| 6/06 21:21 | 06/29/06 04:49 | Maclin | Duclin | 123-366 | 06/28/06 | 09/22/90 | | .8 |
| 6/06 21:21 | 06/29/06 04:47 | Joy | Paul | 211708 | 06/28/06 | 12/31/69 | | 21.23 |
| 6/06 21:21 | 06/29/06 04:43 | Mac | Donald | 122-346 | 12/24/59 | 06/28/06 | | 1.06 |
| 6/06 21:21 | 06/29/06 04:43 | Sam | Dominic | 123-478 | 06/29/06 | 11/05/90 | | 1.98 |
| 6/06 21:21 | 06/29/06 04:30 | David | Sanjay | 211730 | 06/28/06 | 03/04/98 | Test | 4.15 |
| 6/06 21:21 | 06/29/06 04:19 | Hendry | William | 34232323 | 06/28/06 | 02/11/76 | Sample | 27.3 |
| 6/06 21:21 | 06/28/06 14:04 | Michael | Murrey | 10022 | 06/27/06 | 02/11/50 | Office Note | 1.03 |
| 6/06 14:19 | 06/28/06 03:55 | Kevin | Sam | 224 | 06/27/06 | 09/08/04 | | 3.8 |
| 5/06 17:06 | 06/24/06 05:55 | Vincent | Raja | 10001 | 06/23/06 | 01/31/90 | Standard | 1.17 |
| 6/06 21:21 | 06/21/06 01:10 | Honey | Dew | 567 | 06/20/06 | 04/03/04 | Surgical | 1.27 |
| 5/06 17:00 | 06/21/06 01:04 | Esther | Anita | 165120 | 06/20/06 | 12/23/96 | Standard | 1.02 |
| 6/06 21:21 | 06/21/06 01:01 | Anna | Christy | 211809-2 | 06/20/06 | 10/31/84 | Standard | 2.03 |
| 6/06 21:21 | 06/20/06 07:31 | Emily | Dickenson | 4565454 | 06/21/06 | 09/13/96 | OFFICE NOTE | 17.22 |
| 6/06 21:21 | 06/20/06 07:20 | Aaron | Elias | 76890 | 06/03/06 | 10/22/84 | OFFICE NOTE | 17.12 |
| 6/06 21:21 | 06/20/06 07:17 | Anton | Joseph | 435465 | 06/02/05 | 10/09/86 | OFFICE NOTE | 17.13 |
| 5/06 17:06 | 06/20/06 07:06 | Almena | Margaret | 10039 | 06/16/06 | 05/31/55 | SURGICAL REPO | 30.67 |
| 3/06 14:04 | 06/20/06 05:10 | Adlin | Lydia | 10024 | 06/02/06 | 10/23/84 | SURGICAL REPO | 23.4 |
| 3/06 14:08 | 06/20/06 05:08 | Betty | Gargo | 10023 | 06/18/06 | 06/18/06 | SURGICAL REPO | 23.43 |
| 6/06 21:48 | 06/20/06 05:03 | Christy | Alice | 77711 | 06/19/06 | 10/21/55 | SURGICAL REPO | 31.37 |
| 6/06 21:48 | 06/20/06 05:02 | Michael | Murrey | 10022 | 06/17/06 | 02/11/50 | SURGICAL REPO | 20.33 |
| 5/06 17:00 | 06/20/06 04:59 | Khan | Rajesh | 12341 | 06/02/05 | 05/18/35 | OFFICE NOTE | 21.08 |
| 6/06 21:48 | 06/20/06 04:56 | Samuel | Arnold | 10021 | 12/31/99 | 11/10/71 | SURGICAL REPO | 37 |

## - The Rejected Folder

This folder contains all the items that have been received from the transcriptionist or rejected because of erroneous material. All of the same information about a file that could be viewed in the inbox is displayed here except for the report type which is replaced by the rejection reason in this folder. Once again there is a search feature that can be utilized.



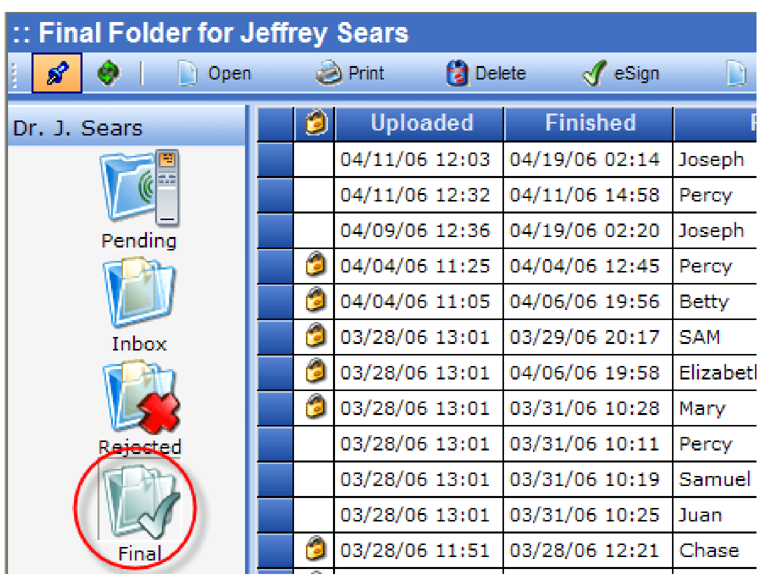

| Dictated | Uploaded | Finished |
|---|---|---|
| 04/11/06 11:23 | 04/11/06 11:44 | 04/19/06 05:29 |
| 04/07/06 12:00 | 04/07/06 12:04 | 04/19/06 02:19 |
| 04/07/06 10:37 | 04/07/06 10:44 | 04/20/06 07:26 |
| 04/04/06 11:49 | 04/04/06 12:15 | 04/11/06 10:59 |
| 04/04/06 11:46 | 04/04/06 12:16 | 04/11/06 13:02 |
| 03/28/06 12:36 | 03/28/06 13:01 | 03/31/06 10:06 |
| 03/22/06 08:42 | 03/22/06 08:44 | 03/27/06 16:34 |
| 03/21/06 13:35 | 03/21/06 13:36 | 03/21/06 13:40 |
| 03/21/06 13:34 | 03/21/06 13:36 | 04/11/06 14:56 |
| 03/21/06 12:21 | 03/21/06 12:32 | 03/21/06 13:00 |

## a. Searching for a Document

To search for a document click the “Search” button on the main menu and enter the parameters to be used. Once either a report type, first name, last name or an ID # have been entered- click the “Search” button.

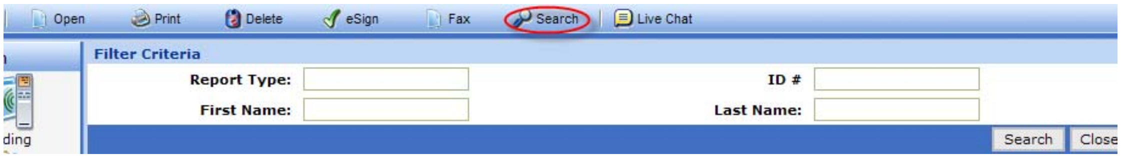

## - The Final Folder

Once the “Finalize” button is clicked in the inbox the selected document is sent to this folder and is stored here permanently or until deleted. A lock in the first column on the left side indicates that the document has been eSigned. Any item in this view can be printed or searched for.



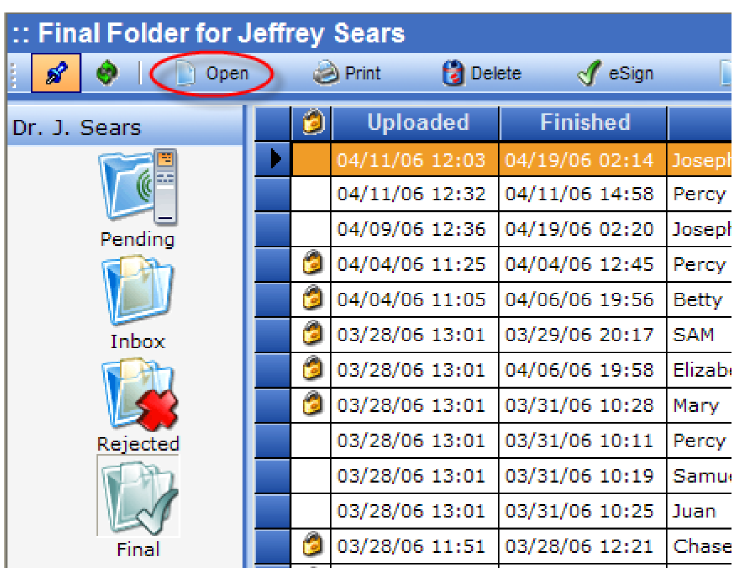
## a. Searching for a Document

To search for a document, click the "Search" button on the main menu and enter the parameters to be used. Once either a report type, first name, last name or an ID # have been entered click the "Search" button.




## b. Opening a Document

By selecting a single line or multiple lines, or by control clicking them or shift clicking them, documents can be opened. Once the documents that need to be opened are selected, open them by clicking the "Open" button. All selected documents will be opened at the same time as different word documents, if multiple documents were selected.



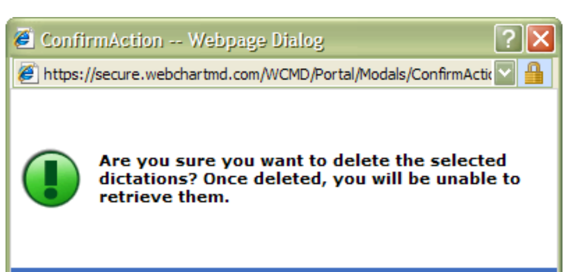
## c. Printing a Document

By selecting a single line or multiple lines, or by control clicking them or shift clicking them and then clicking on ‘Print’, files can be printed. The files will be sent to the last printer that was used with Microsoft Word.


## d. Deleting a Document

By selecting a single line or multiple lines, or by control clicking them or shift clicking them and then clicking on ‘Delete’, files can be deleted. The file/s will be permanently deleted and <u>will not!</u> be recoverable.

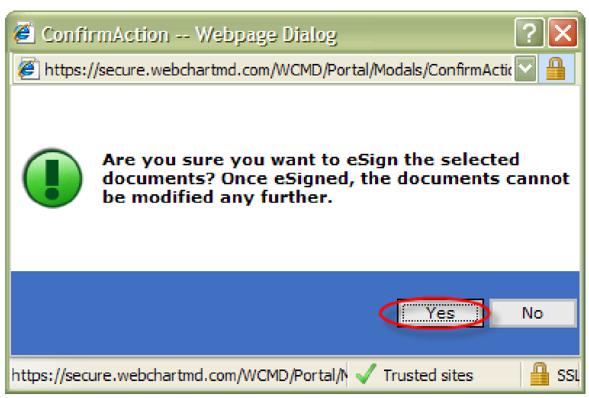

When the files that need to be deleted are selected and the “Delete” button is clicked a confirmation dialog box will display. Press the “Yes” button in this dialog box to complete the deletion.



## e. e-Signing a Document

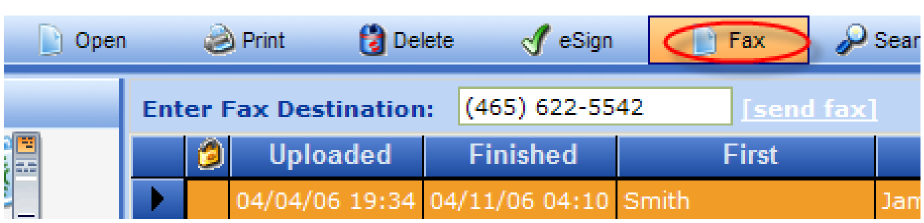
By selecting one line or multiple lines, or by control or shift clicking them, and clicking the “e-Sign” button files can be e-Signed.


Once the files are selected that need to be e-Signed, click the “e-Sign” button. Then a confirmation dialog box will display. Click the “Yes” button in this dialog box to complete the e-Signing process.

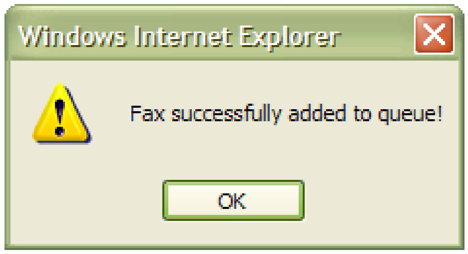



## f. Faxing a Document

First in order to fax a document make sure that no pop-up blocking software in enabled. Then select the documents that need to be faxed and click the “Fax” button.



Once the files that need to be faxed have been selected, a fax number has been entered and the "Send Fax" link has been clicked a pop-up notification will come up. This pop-up states that the document has been added to the fax queue. To close the notification window click the "OK" button.



# Using WebChartMD – For the MT Vendor

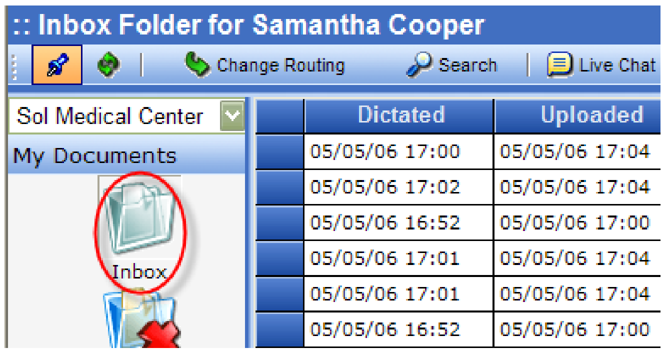
## ***Opening the Web Portal***

Go to "www.webchartmd.com" and click on the "LOG IN" button.


Then on the next page type a username and password into the fields and click the "Submit" button. If done successfully the view will change and the web portal will be displayed with a username displaying near the top of the page.

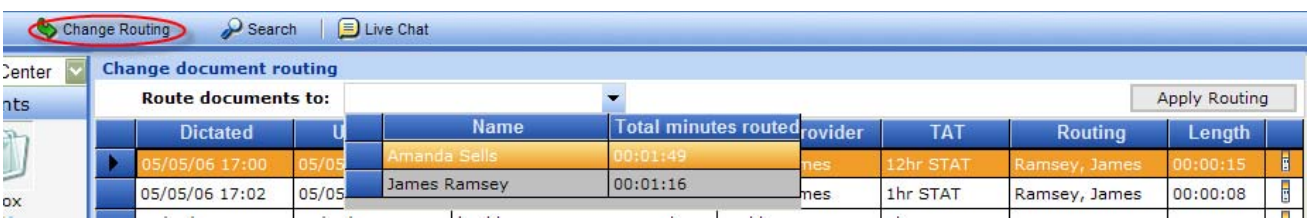
## - The Inbox Folder

This folder contains all the items that have been received from the care provider that are awaiting transcription. In this folder view the date when the transcription was dictated, and uploaded, as well as whether the item is STAT or not can all be seen. Information about which care provider the file is from and the dates that the file was dictated and uploaded can also be seen. The "Search" button at the top of the screen can be used to search items by their dictation date, upload date or the care provider's first or last name. There is also a field indicating the routing destination for individual files.




## a. Routing a Dictation

By selecting one line or multiple lines, dictations can be routed to a different MLS. Once the items which routing needs to be changed for are selected click the "Change Routing" button and select the MLS that would like to route the items to by clicking on the drop down arrow and selecting the MLS from the list.



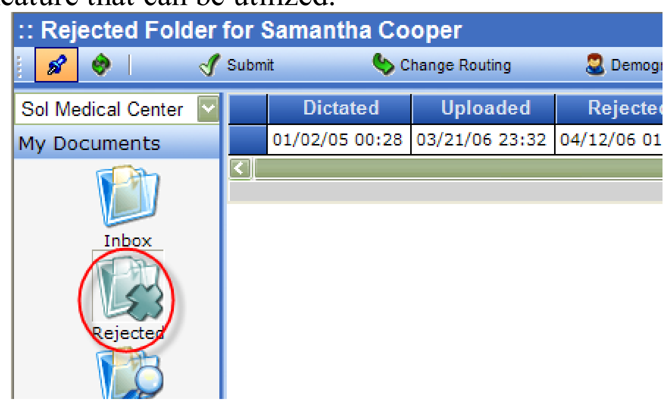

Once an MLS is selected click the "Apply Routing" button.

## b. Searching for a Dictation

To search for a document click the "Search" button on the main menu and enter the parameters to be used. Once either a CP first name, CP last name, uploaded from, uploaded to, or a filename have been entered click the "Search" button.

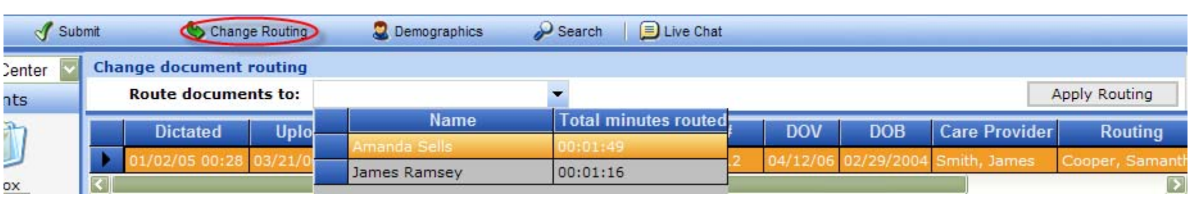

## - The Rejected Folder

This folder contains all the items that have been sent to the care provider and that the care provider rejected because of erroneous material. All of the same information about a file that can be viewed in the inbox view can be seen here and in addition, the rejection reason and the patient's demographic information can be viewed. Once again there is a search feature that can be utilized.




## a. Routing a Transcription

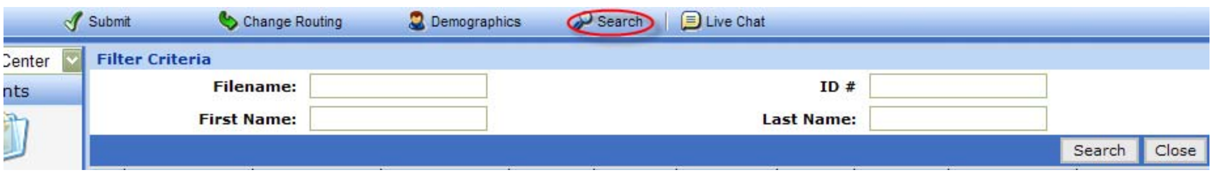
By selecting one line or multiple lines, a dictation can be routed to a different MLS. Once the items which need to have routing changes made are selected click the "Change Routing" button and select the MLS that the items need to be routed to by clicking on the drop down arrow and selecting the MLS from the list.



Once an MLS has been selected click the "Apply Routing" button.

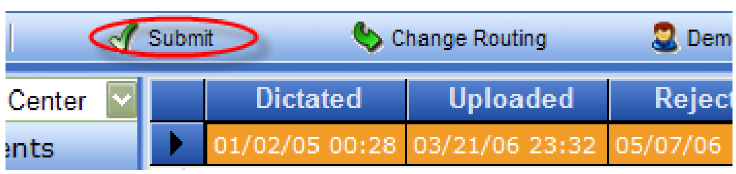

## b. Searching for a Transcription

To search for a transcription click the "Search" button on the main menu and enter the parameters to be used. Once either a filename, ID #, first name, or last name has been entered click the "Search" button.



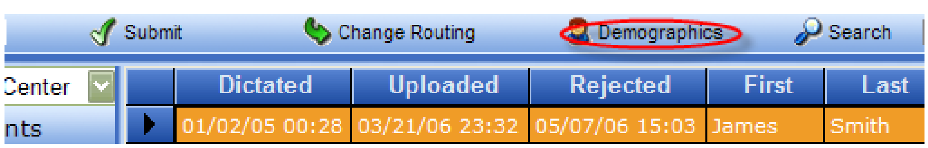

## c. Submitting an Updated Transcription

By selecting one line or multiple lines, or by control or shift clicking them and pressing the "Submit" button files can be submitted to the care provider. Once the files that need to be sent to the care provider are selected click the "Submit" button and the files are sent on their way.

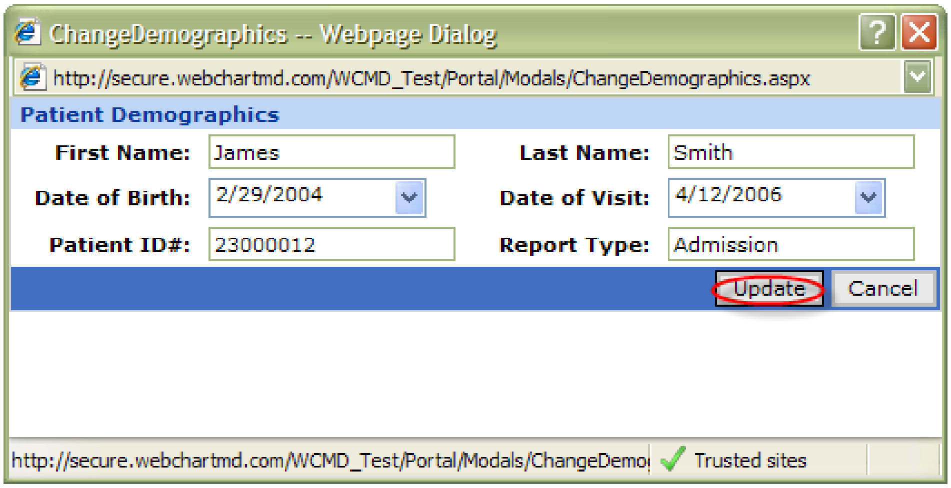



## d. Updating/Changing Demographics

First make sure that no pop-up blocking software is enabled and then select a single document. Once a single document is selected click the "Demographics" button.

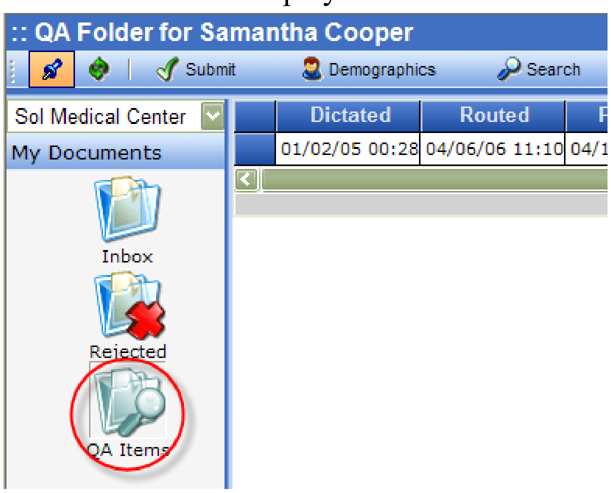



When the "Demographics" button is clicked a pop-up will display with all the information that can be changed for that patient's demographics. Once the necessary changes have been made click the "Update" button and the changes are made on the server.




## - The QA folder

This folder allows the work of the MT vendor's transcriptionists to be QAd if their privileges have been set so that they cannot upload directly to the care provider's inbox. The associated audio file can be played as the transcribed document is read.

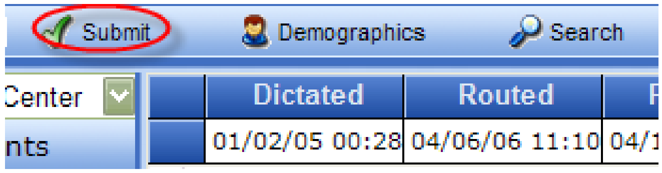



## a. Searching for a Transcription

To search for a transcription click the "Search" button on the main menu and enter the parameters to be used. Once either a filename, ID #, first name, or last name have been entered then click the "Search" button and the list of transcriptions will be filtered.

## b. Submitting a Transcription

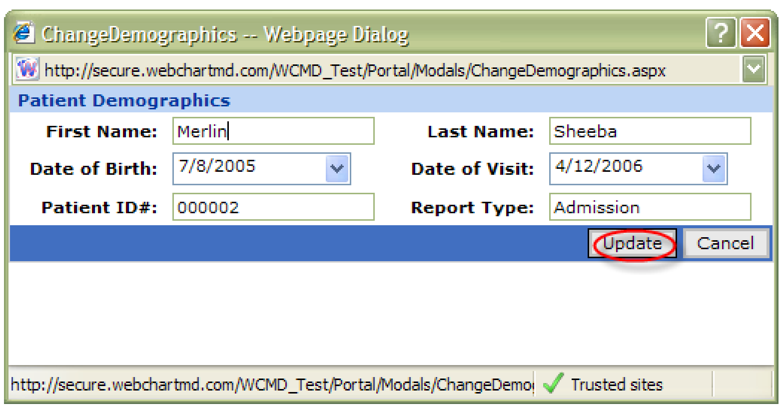
By selecting one line or multiple lines, or by control or shift clicking them and pressing the "Submit" button files can be submitted to the care provider. Once the files that need to be sent to the care provider have been selected click the "Submit" button and the files are sent on their way.




## c. Updating/Changing Demographics

First make sure that no pop-up blocking software is enabled and select a single document. Once a single document is selected click the "Demographics" button.

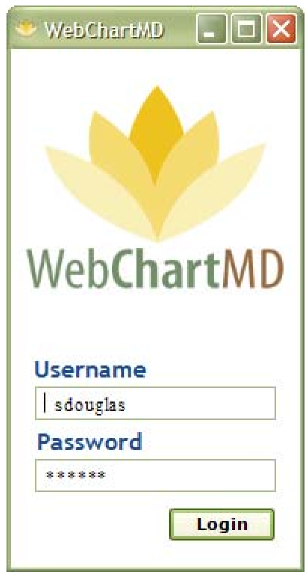

When the "Demographics" button is clicked a pop-up will display with all the information that can be changed for that patient's demographics. Once the changes have been entered click the "Update" button and the changes are made on the server.



## Using the desktop client

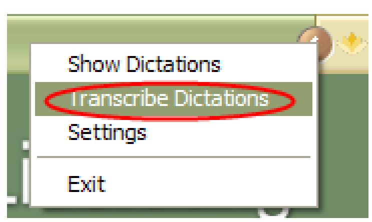
1. Open WebChartMD by double-clicking the desktop icon named "WebChartMD" or by accessing the start menu and opening the WebChartMD folder and then clicking the icon there named "WebChartMD".

2. Enter a username and password in the appropriate fields. Once a username and password have been entered press the "Login" button.



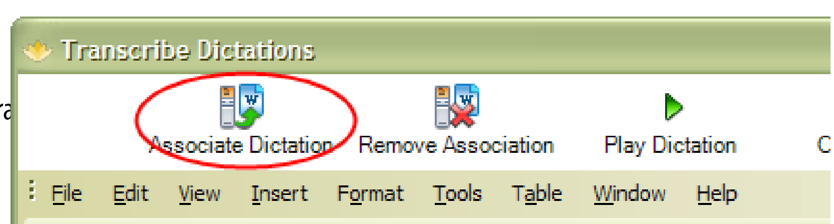

### - Transcribing a document using WebChartMD

By right clicking the WebChartMD tray icon and clicking the "Transcribe Dictations" option the document transcription interface can be accessed.

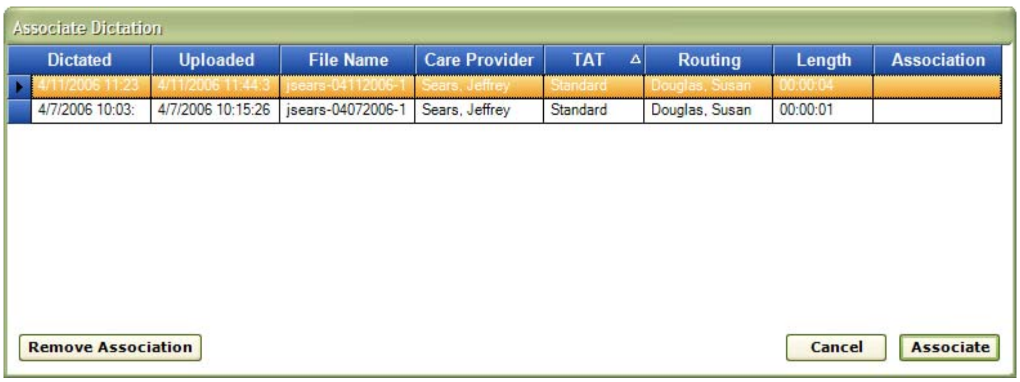

### a. Associating a Dictation

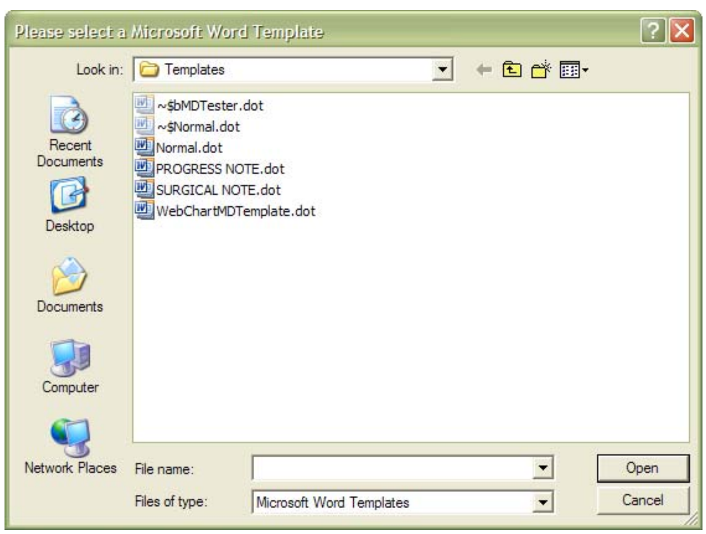
A word document can be associated to a dictation by clicking "Associate Dictation" button in the menu or by pressing ctrl+alt+a.



To associate a dictation:

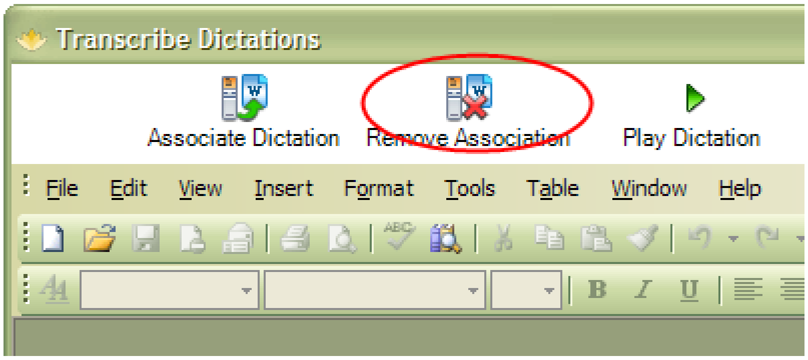
1. Click "Associate Dictation" or press ctrl+alt+a and a dialog box will come up
2. Select the dictation which needs to be transcribed and click "associate." If the program is set to use the default template then it will automatically use that template but if it has not been selected, it will bring up a dialog box showing the default template folder where a template can be selected. Once a template has been selected and the "Open" button has been clicked the word document will be started.



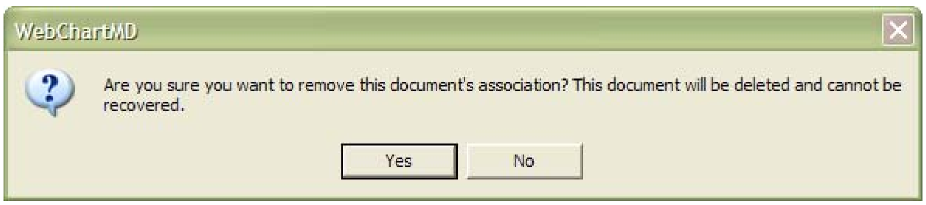




## b. Removing an Association

An association can be removed by clicking Remove Association" button in the menu or by pressing ctrl+alt+r.

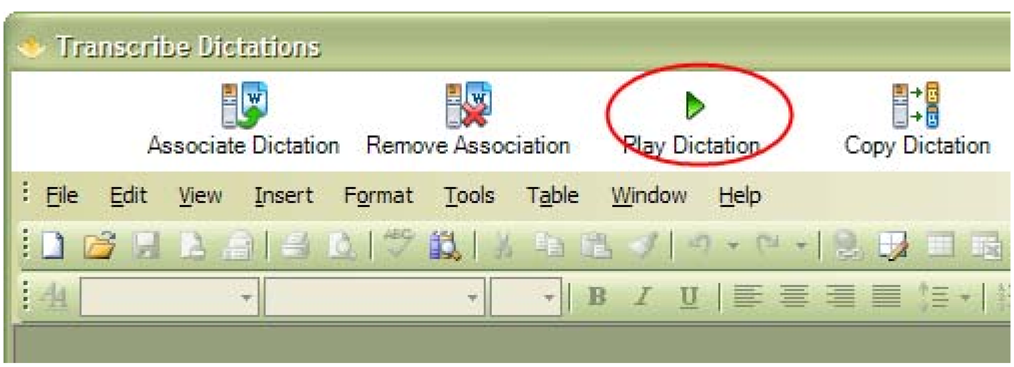



Once "Remove Association" has been clicked or ctrl+alt+r has been pressed a prompt will come up asking for confirmation of the association removal and informing the user that the word document will be deleted.

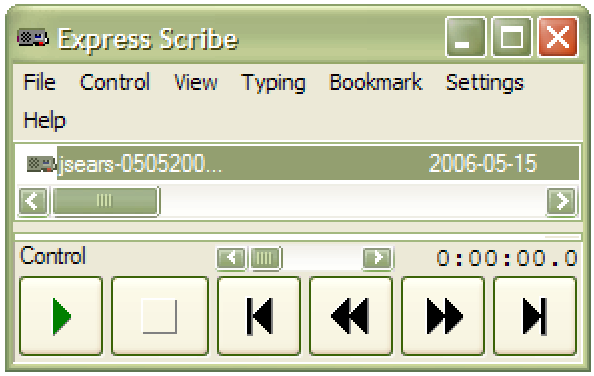



## c. Playing a Dictation

A dictation can be played by clicking Play Dictation" button in the menu or by pressing ctrl+alt+p.

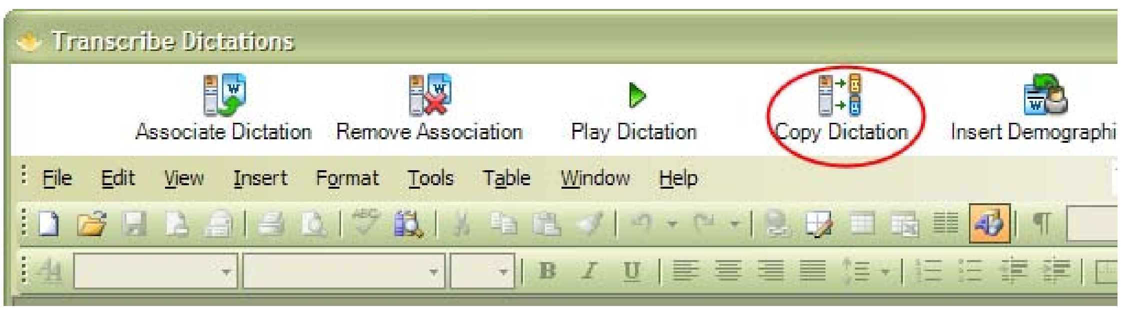



When "Play Dictation" is clicked or ctrl+alt+p is pressed the audio player will be launched and all the normal tasks can be performed on the audio file such as play, rewind, fast forward, etc.

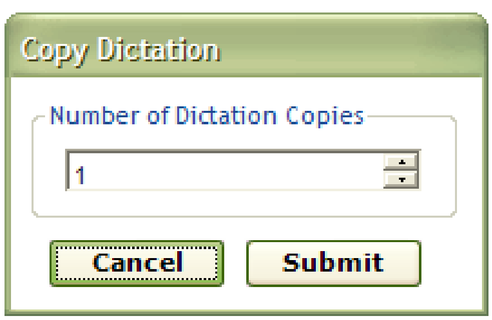



## d. Copying a Dictation

A dictation can be copied by clicking "Copy Dictation" button in the menu or by pressing ctrl+alt+c.

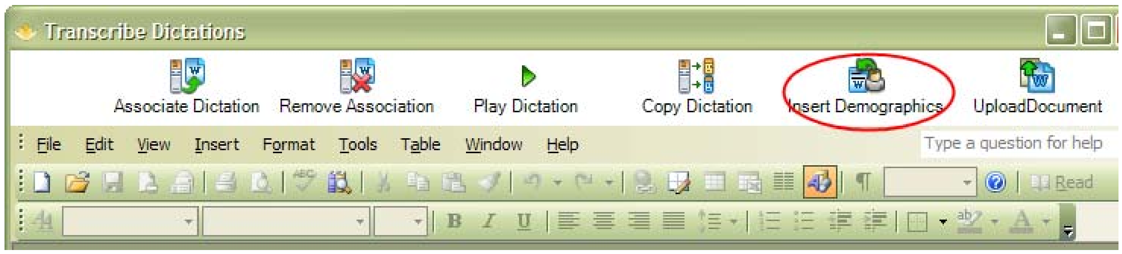



When a dictation is copied a small dialog box will prompt the user to enter the number of dictation copies the user would like to make. This feature is largely useful when a care provider dictates more than one patient's information in the same audio file. Once the number of copies has been entered click the "Submit" button.

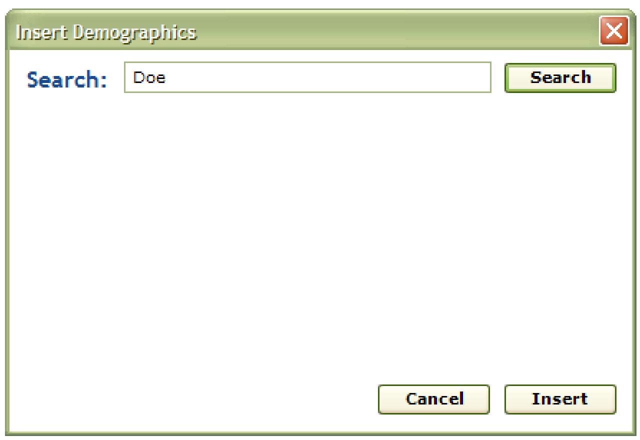


## e. Inserting patient demographics

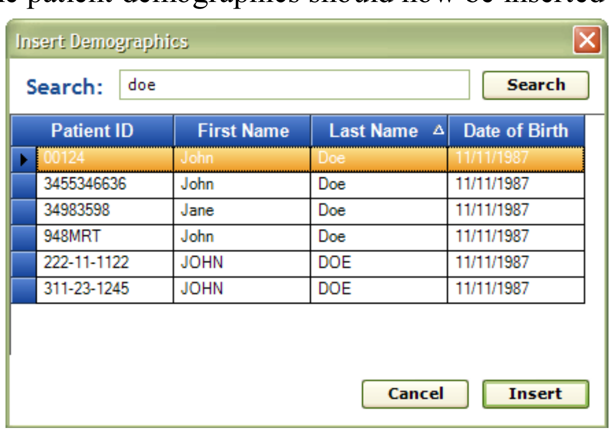
Patient demographics can be inserted into a word document by clicking the "Insert Demographics" button in the menu or by pressing ctrl+alt+i.




Once the dialog box comes up the user can enter a variety of patient information to search for. Patient information can be searched for by patient ID number, first name, or last name.

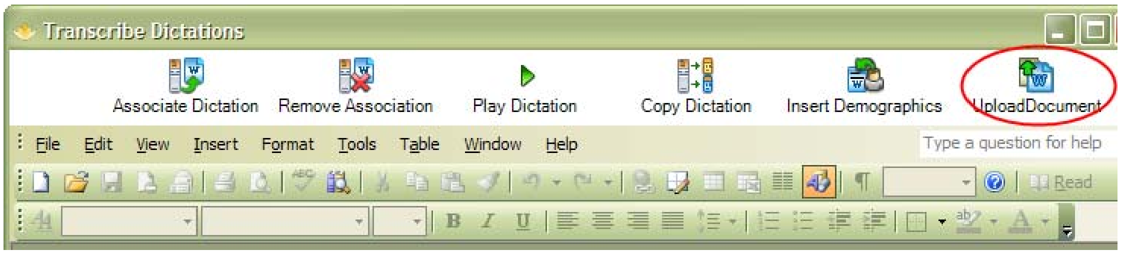



Once the search is initialized a second view will allow the user to select the specific patient demographics that need to be inserted. Once the selection has been made click the "Insert" button. The patient demographics should now be inserted in the document.

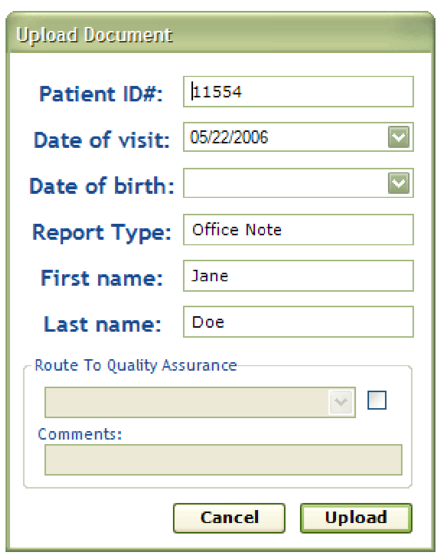


## f. Uploading Documents

A dictation can be uploaded to the server by clicking "Upload Document" button in the menu or by pressing ctrl+alt+u.

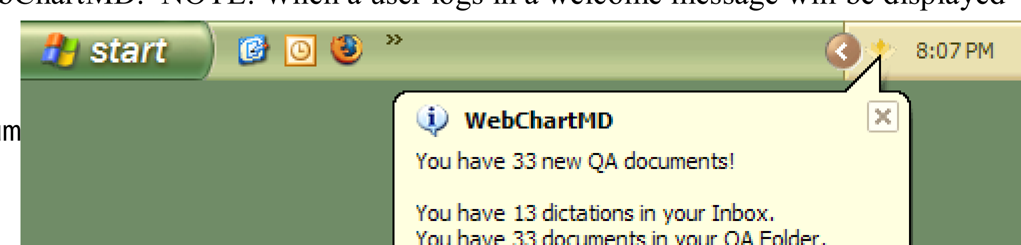



Once Upload Document" is clicked or ctrl+alt+u is pressed a dialog box will pop up asking the user to verify that the patient demographic information is correct. A document can also be set to be sent for QA when it is uploaded. To select an item for QA click the checkbox beside the route to quality assurance dropdown list and select the person to QA the document from the dropdown list beside the checkbox. Once the information has been verified press the "Upload" button to send the document and that information to the server.




### - Changing Settings and Parameters

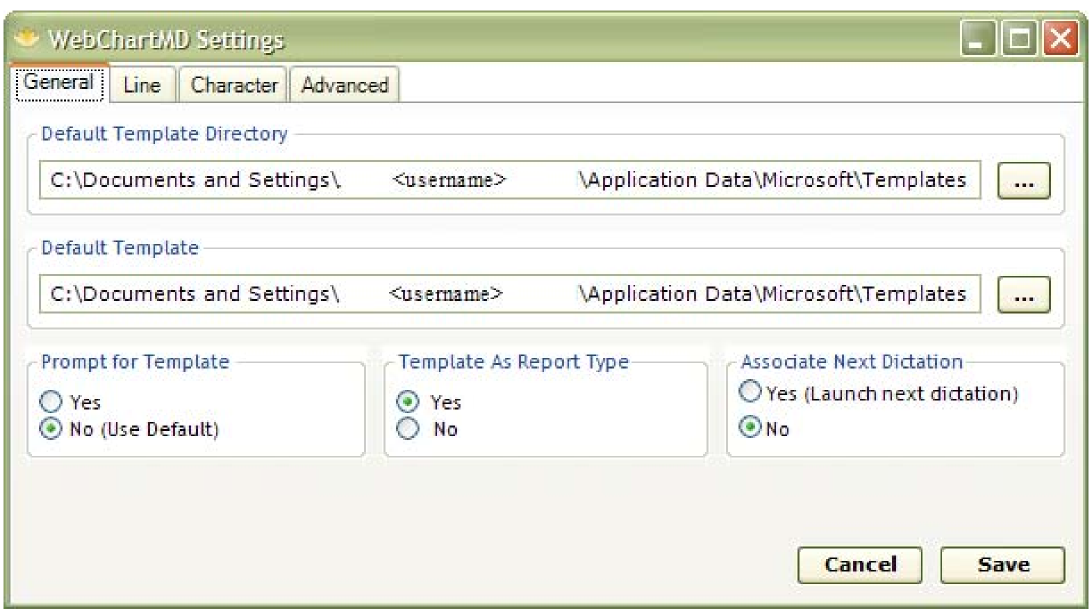
The settings and parameters can be changed by right clicking the tray icon for WebChartMD. NOTE: When a user logs in a welcome message will be displayed



## a. Changing the default template directory, the default template and other template settings

Once a user has logged into the desktop client the directory where the dictations are downloaded to the user's computer can be changed.  To do this right click the tray icon and click "Settings".

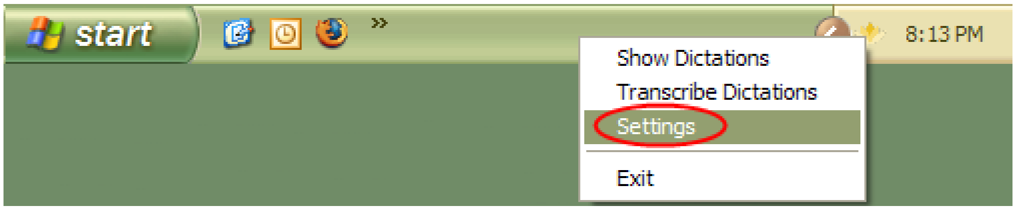

Once "Settings" has been clicked a dialog box should come up allowing the user to change the default template directory and what the default template is as well as various other template settings.



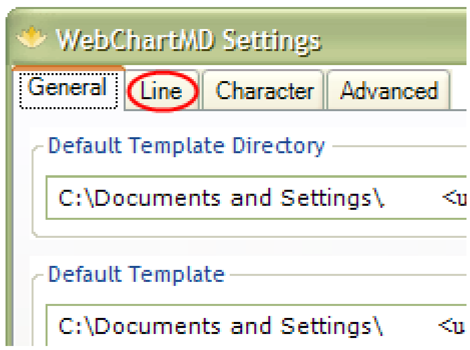

The prompt for template section allows the user to change whether or not the word plug-in will prompt for a template to use when starting a new dictation.  The template as report type section decides whether or not the type of template is the report type.

## b. Changing Line Count Settings

Once a user has logged into the desktop client the directory where the dictations are downloaded to the user's computer can be changed. To do this right click the tray icon and click "Settings".

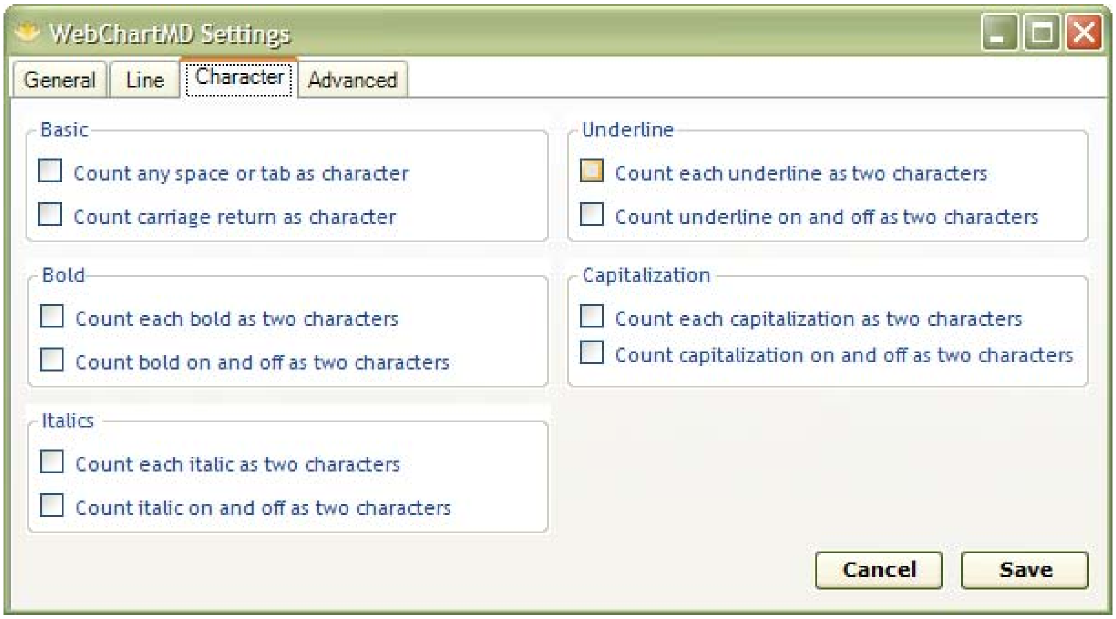


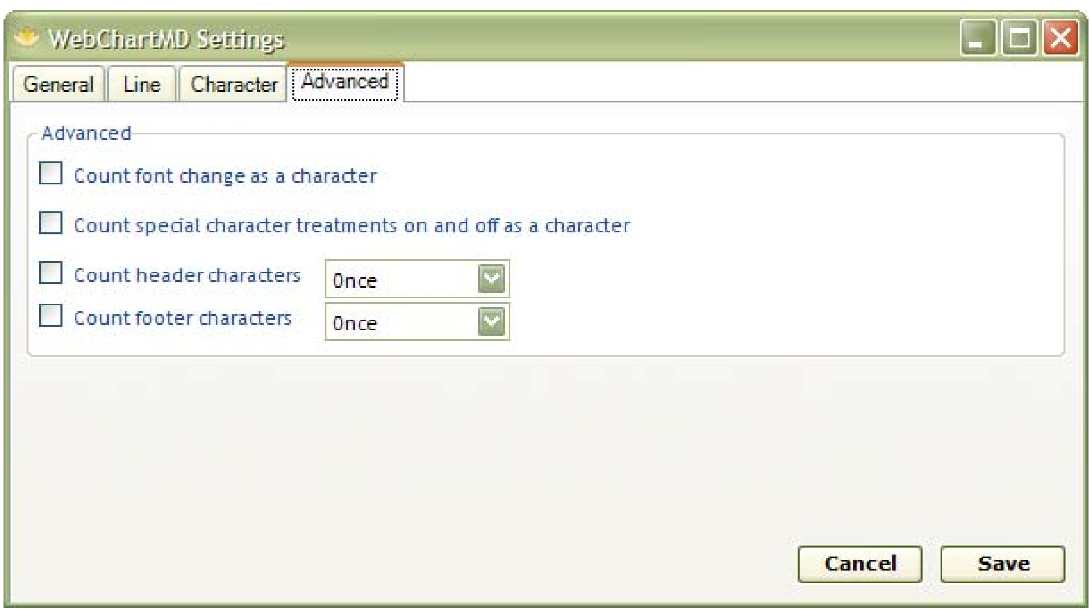

In the dialog box that comes up click the "Line" tab




Once the user has clicked the tab the view should change showing new options that allow line count settings to be changed.


The line count settings actually extend over three tabs: the "Line", "Character", and "Advanced" tabs. The options within the "Character" and "Advanced" tabs' options only activate according to the rate selection. In the image above a "Black Character" count is used. With the black character setting the only things the user can change are the price per line and the number of characters per line. The additional options are identical for both the "Black Character" setting and the "ASCII" setting. With the "gross" and "net" settings the "Character" and "Advanced" tabs' options become active. Most of the options within the "Character" and "Advanced" tabs are self explanatory.



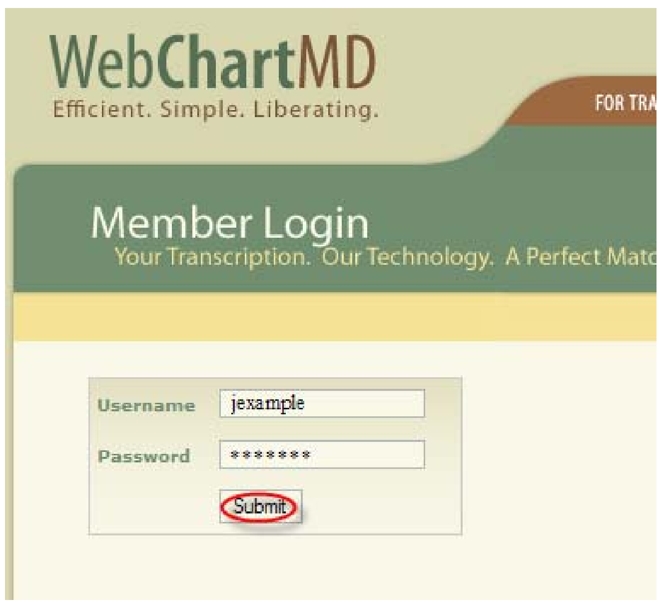



# Using WebChartMD – For the MLS

## *Opening the Web Portal*

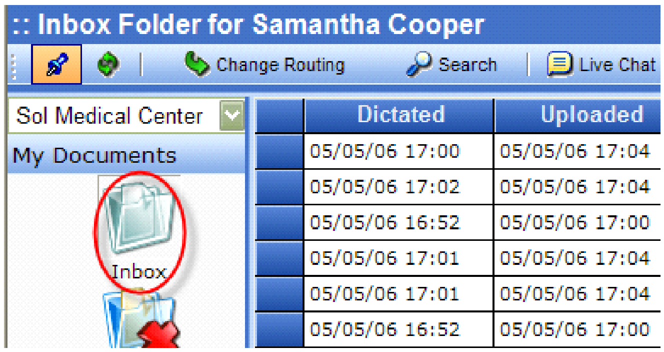
Go to "www.webchartmd.com" and click on the "LOG IN" button.


Then on the next page type a username and password into the fields and click the "Submit" button. If the user has done this successfully the view will change and the user will now be in the web portal with the user's name displaying near the top of the page.



## - The Inbox Folder

This folder contains all the items that the user has received from the care provider that are awaiting transcription. In this folder view the user can see the date when the transcription was dictated, and uploaded as well as whether the item is STAT or not. The user can also see information about which care provider the file is from and the dates that the file was dictated and uploaded. Click the “Search” button at the top of the screen to search items by their dictation date, upload date or the care provider’s first or last name.

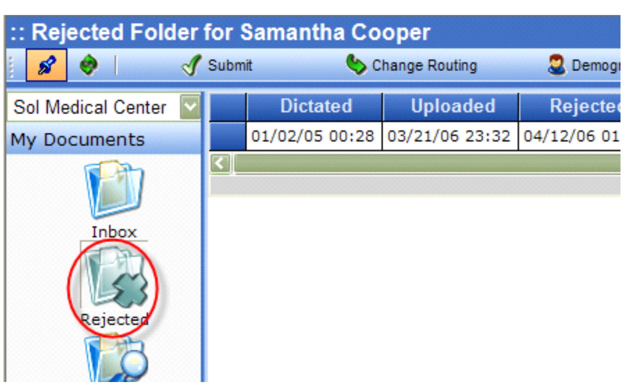



## a. Searching for a Dictation

To search for a document click the “Search” button on the main menu and enter the parameters to be used. Once either a CP first name, CP last name, uploaded from, uploaded to, or a filename has been entered click the “Search” button.

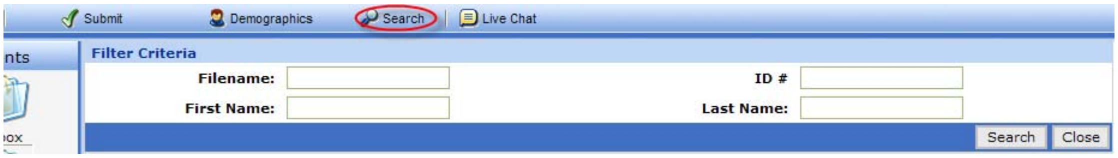

## - The Rejected Folder

This folder contains all the items that have been sent to the care provider and that the care provider rejected because of erroneous material. All of the same information about a file that can be viewed in the inbox can be seen and in addition, the rejection reason and the patient’s demographic information can also be seen. Once again there is a search feature that can be used.



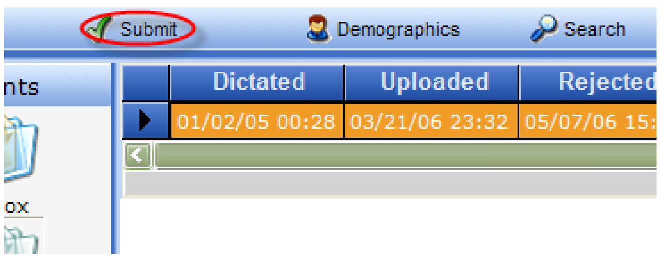
## a. Searching for a Transcription

To search for a transcription click the "Search" button on the main menu and enter the parameters to be used. Once either a filename, ID #, first name, or last name has been entered click the "Search" button.



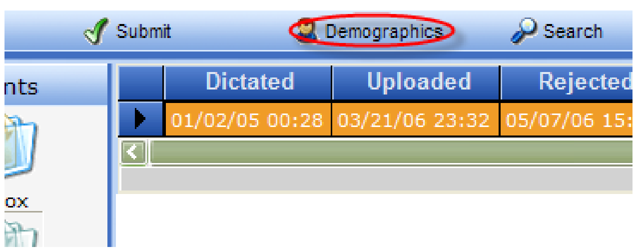

## b. Submitting a Transcription

By selecting one line or multiple lines, or by control or shift clicking them and pressing the "Submit" button files can be submitted to the care provider. Once the files that need to be sent to the care provider are selected click the "Submit" button and the files are sent on their way.

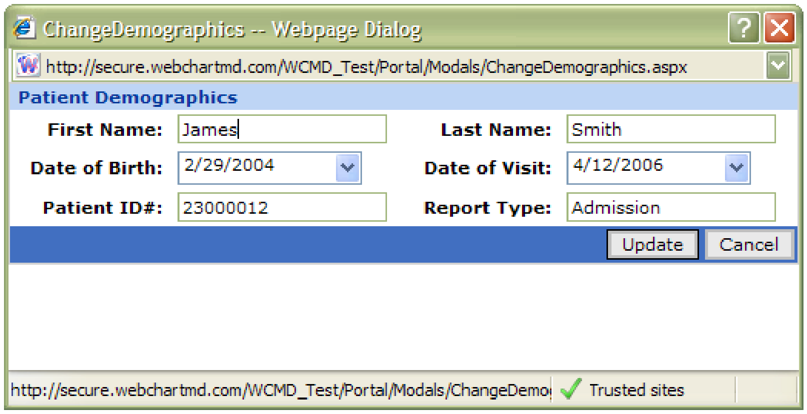



## c. Updating/Changing Demographics

First make sure that no pop-up blocking software is enabled and select a single document. Once a single document is selected click the "Demographics" button.

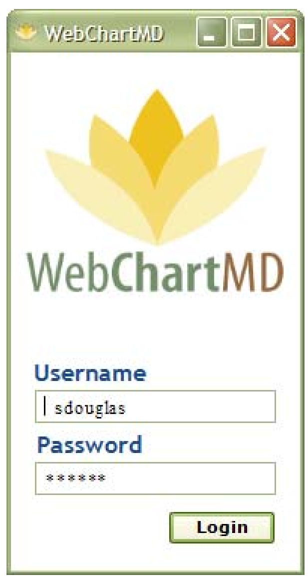


When the "Demographics" button is clicked a pop-up will display with all the information that can be changed for that patients.  Once the changes have been entered click the "Update" button and the changes are made on the server.



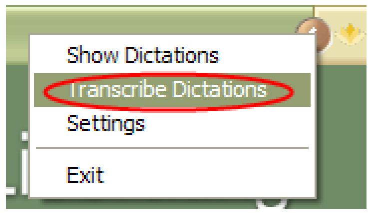

## ***<u>Using the desktop client</u>***

1. Open WebChartMD by double-clicking the desktop icon named "WebChartMD" or by accessing the start menu and opening the WebChartMD folder and then clicking the icon there named "WebChartMD".
3. Enter a username and password in the appropriate fields.  Once the user has entered a username and password press the "login" button.



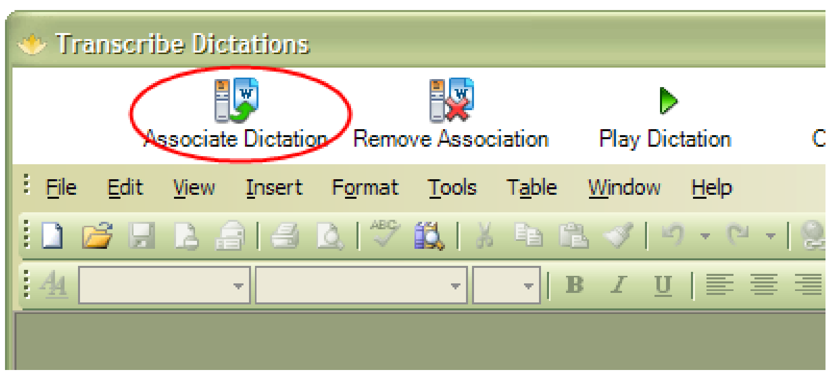
## - Transcribing a document using WebChartMD

By right clicking the WebChartMD tray icon and clicking the "Transcribe Dictations" option the document transcription interface can be accessed.

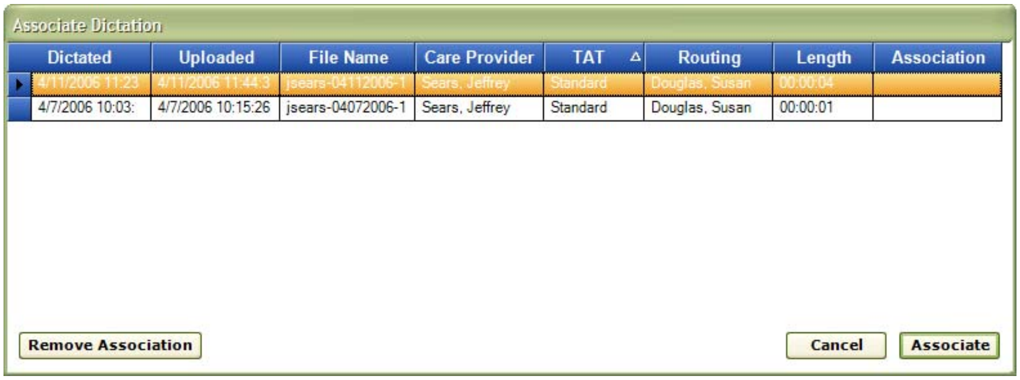

## a. Associating a Dictation

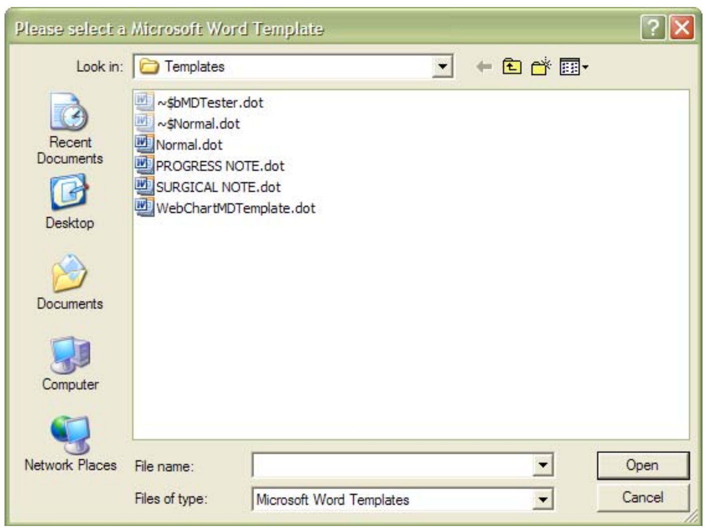
A word document can be associated to a dictation by clicking "Associate Dictation" button in the menu or by pressing ctrl+alt+a.



To associate a dictation:

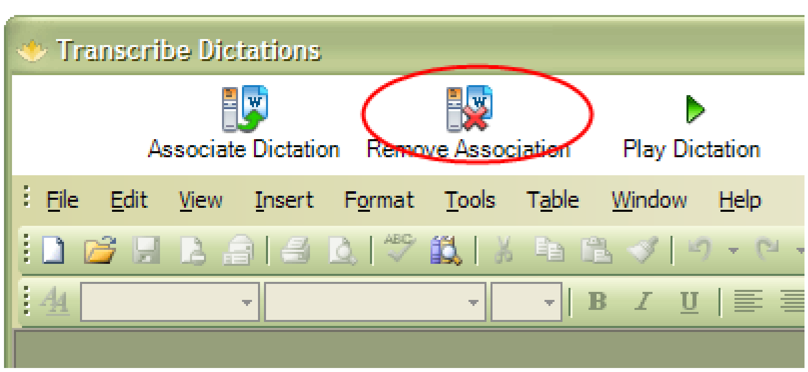
1. Click "Associate Dictation" or press ctrl+alt+a and a dialog box will come up
2. Select the dictation which needs to be transcribed and click "Associate." If the program is set to use the default template then it will automatically use that template but if it has not been selected, it will bring up a dialog box showing the default template folder where a template can be selected. Once a template has been selected and the "Open" button has been clicked the word document will be started.



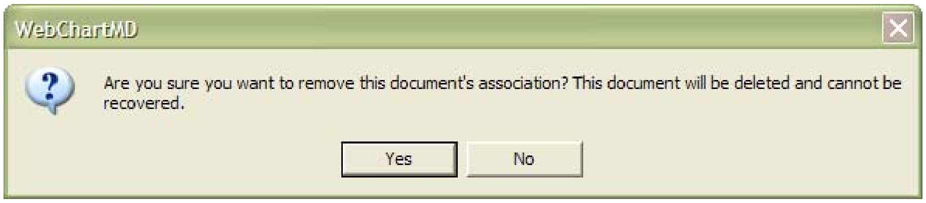




## b. Removing an Association

An association can be removed by clicking "Remove Association" button in the menu or by pressing ctrl+alt+r.

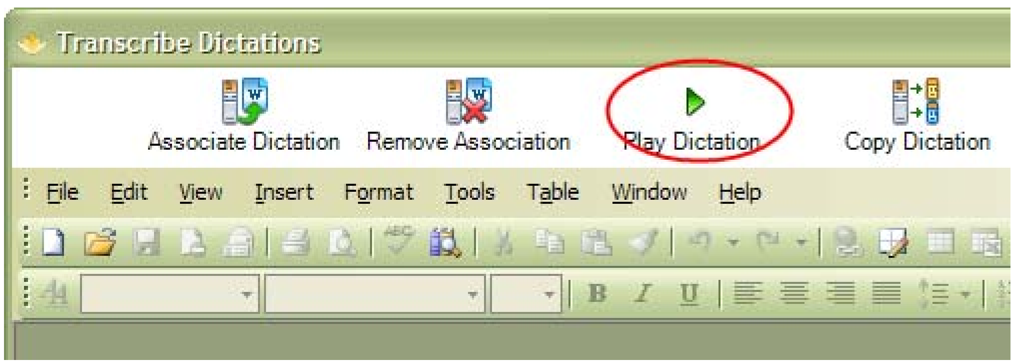


Once “Remove Association” has been clicked or ctrl+alt+r has been pressed a prompt will come up asking for confirmation of the association removal and informing the user that the word document will be deleted.

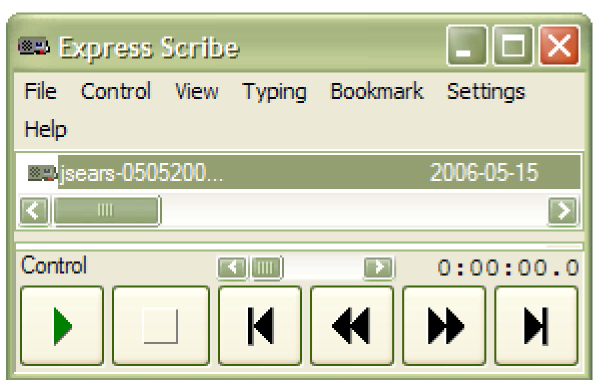



## c. Playing a Dictation

A dictation can be played by clicking “Play Dictation” button in the menu or by pressing ctrl+alt+p.

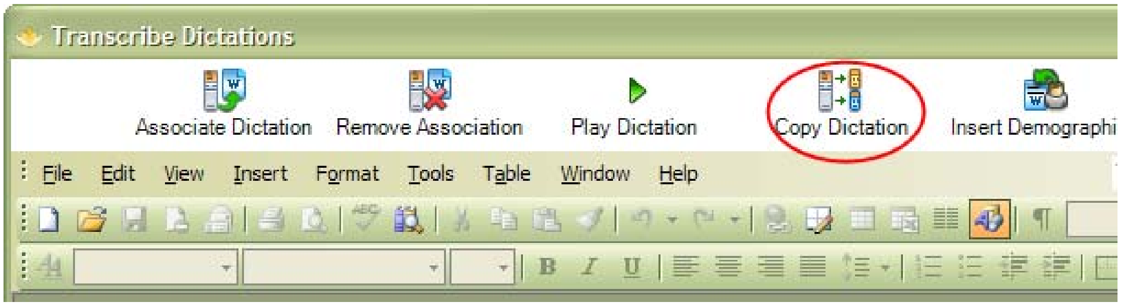



When “Play Dictation” is clicked or ctrl+alt+p is pressed the audio player will be launched and all the normal tasks can be performed on the audio file such as play, rewind, fast forward, etc.

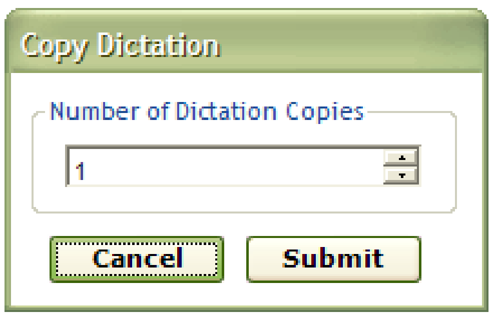


## d. Copying a Dictation

A dictation can be copied by clicking "Copy Dictation" button in the menu or by pressing ctrl+alt+c.

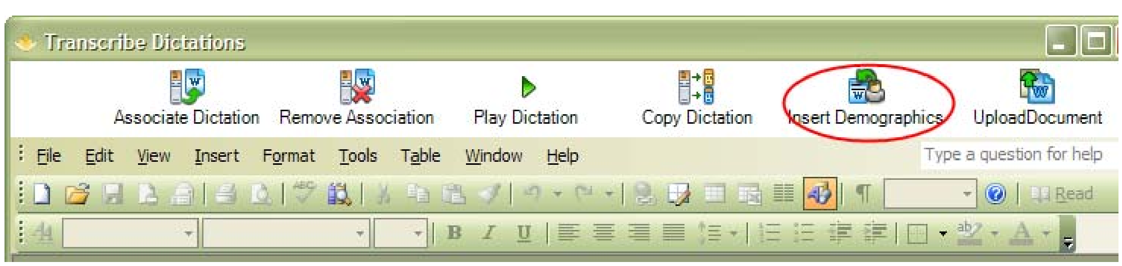



When a dictation is copied a small dialog box will prompt the user to enter the number of dictation copies the user would like to make. This feature is largely useful when a care provider dictates more than one patient's information in the same audio file. Once the number of copies has been entered click the "Submit" button.

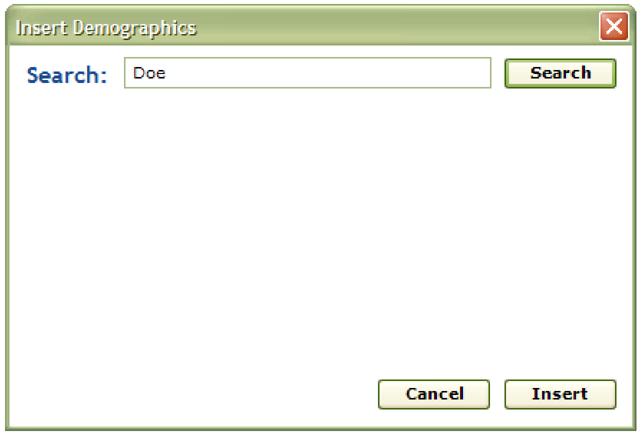



## e. Inserting patient demographics

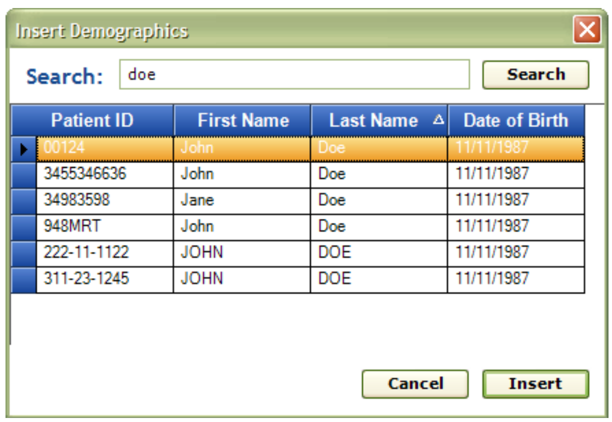
Patient demographics can be insterted into a word document by clicking the "Insert Demographics" button in the menu or by pressing ctrl+alt+i.



Once the dialog box comes up the user can enter a variety of patient information to search for. Patient information can be searched for by patient ID number, first name, or last name.

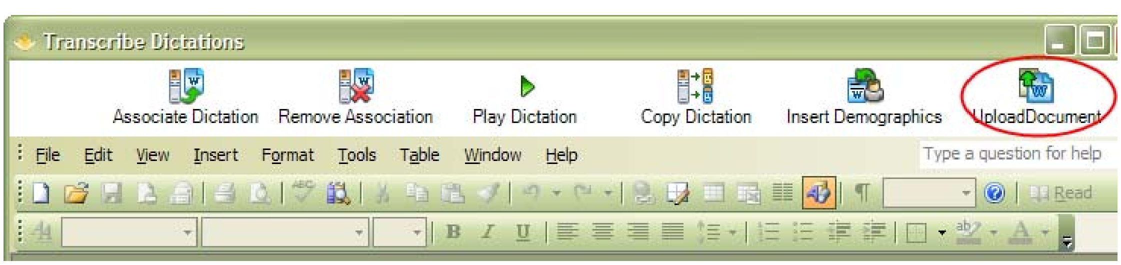



Once the search is initialized a second view will allow the user to select the specific patient demographics that need to be inserted. Once the selection has been made click the "Insert" button. The patient demographics should now be inserted in the document.

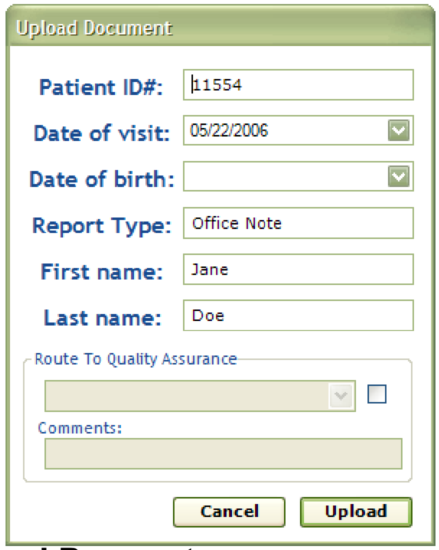



## f. Uploading Documents

A dictation can be uploaded to the server by clicking "Upload Document" button in the menu or by pressing ctrl+alt+u.



Once "Upload Document" is clicked or ctrl+alt+u is pressed a dialog box will pop up asking the user to verify that the patient demographic information is correct. A document can also be set to be sent for QA when it is uploaded. To select an item for QA click the checkbox beside the route to quality assurance dropdown list and select the person to QA the document from the dropdown list beside the checkbox. Once the information has been verified press the "upload" button to send the document and that information to the server.

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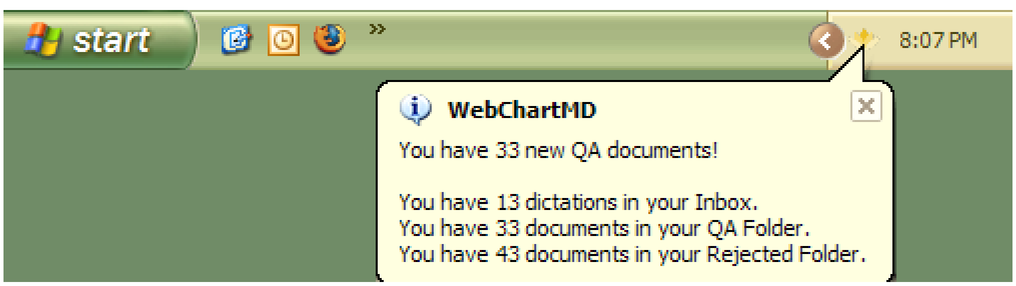


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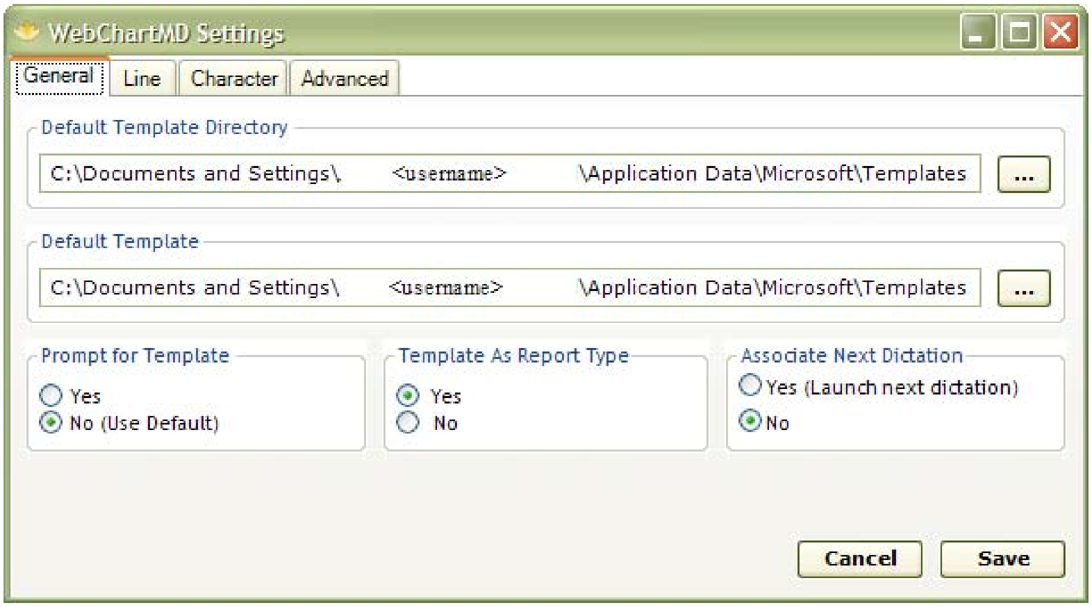


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