



WebChartMD

User's Manual

WebChartMD
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WebChartMD

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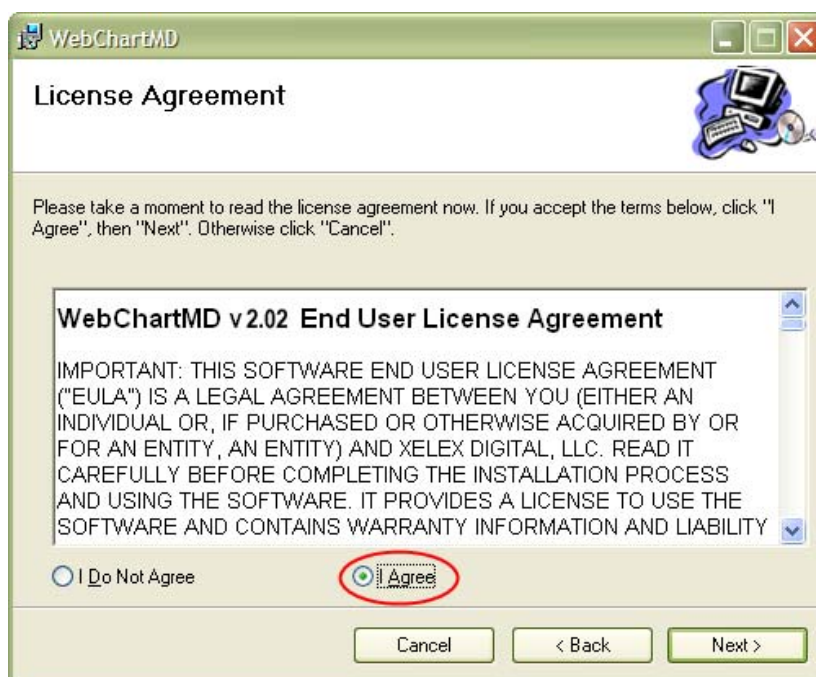
Setting up the WebChartMD System

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

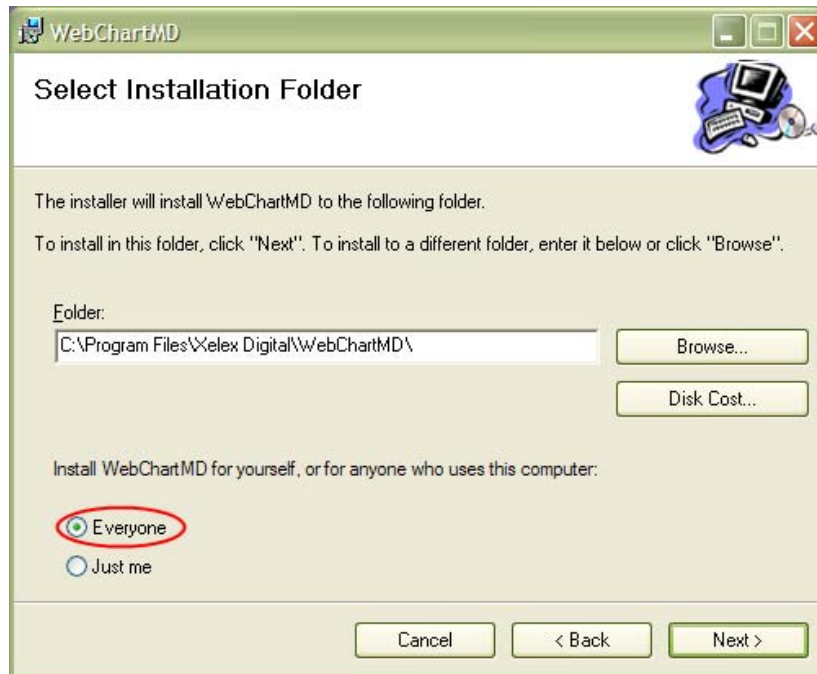


3. Make sure to read the EndUserLicenseAgreement and if it is agreeable select the “I Agree” then click the “Next” button.

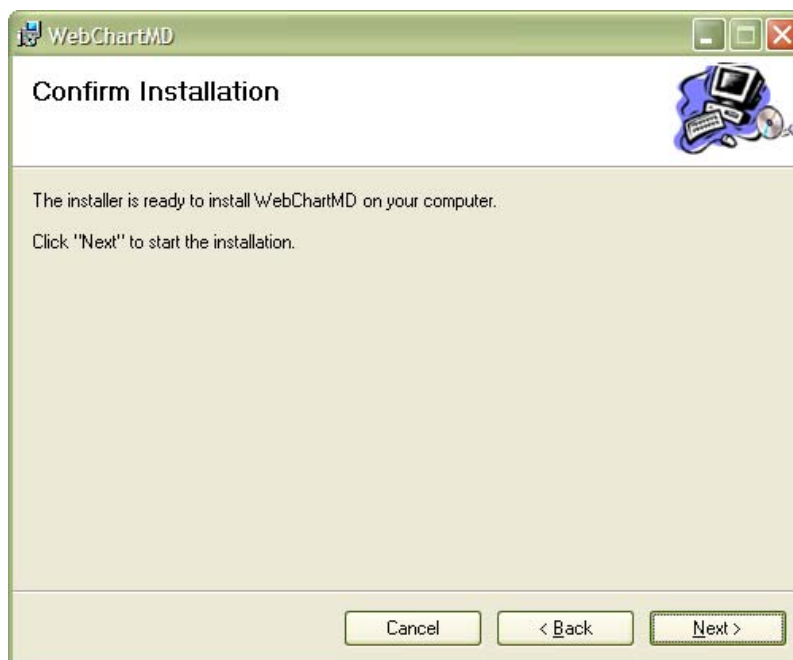


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4. If the program needs to be installed for all users on the current computer be sure to click the button labeled “Everyone” before clicking the “Next” button to continue with the installation.



5. Click the “Next” button to begin the installation



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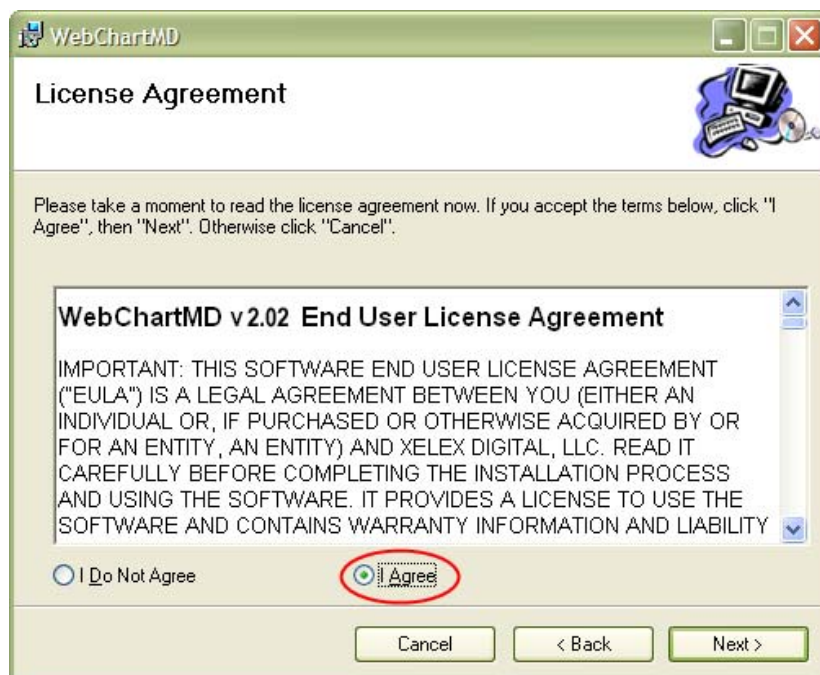
6. When the installation finishes click the “Close” button to complete the installation process.

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

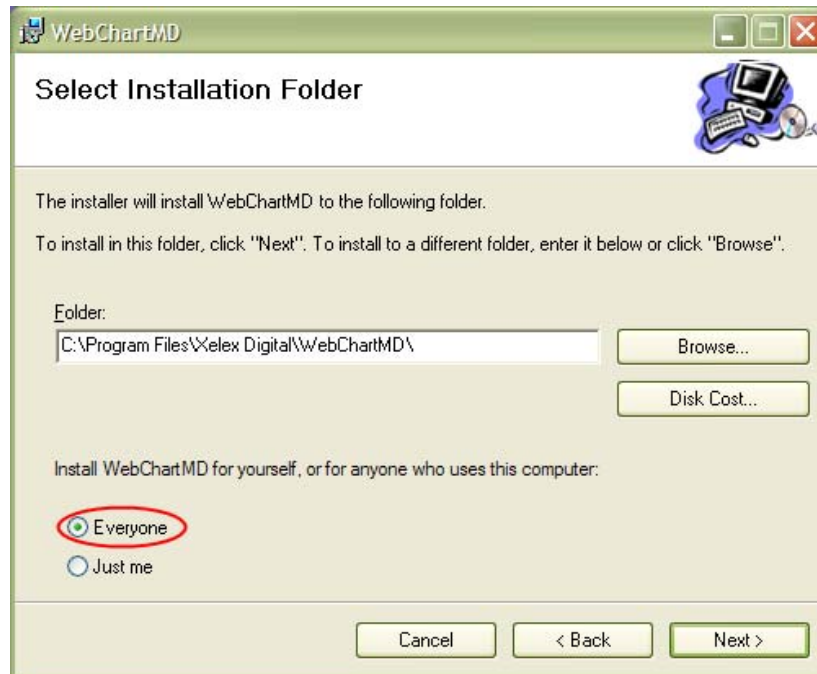


3. Make sure to read the EndUserLicenseAgreement and if it is agreeable select the “I Agree” then click the “Next” button.

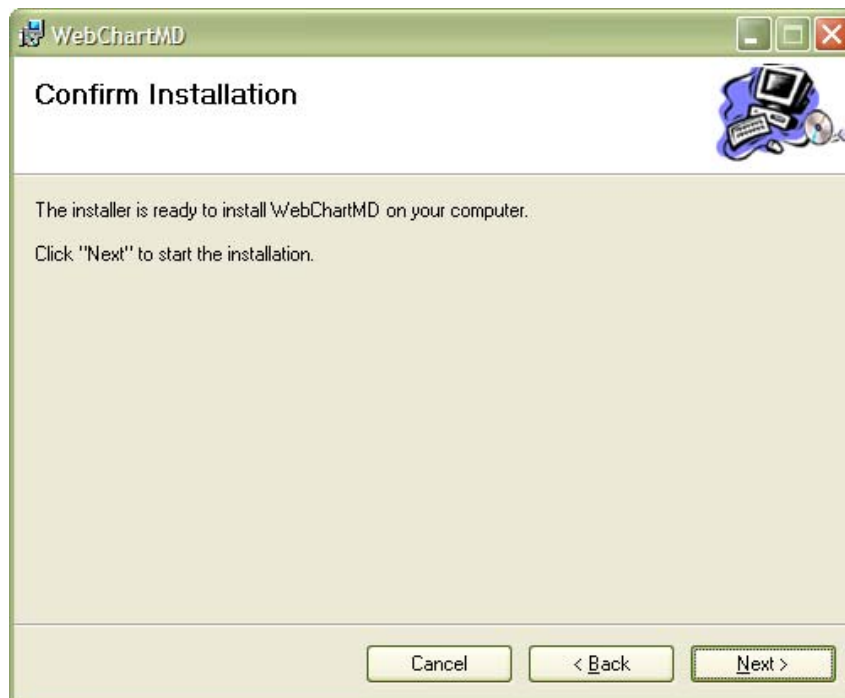


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4. If the program needs to be installed for all users on the current computer be sure to click the button labeled “Everyone” before clicking the “Next” button to continue with the installation.



5. Click the “Next” button to begin the installation

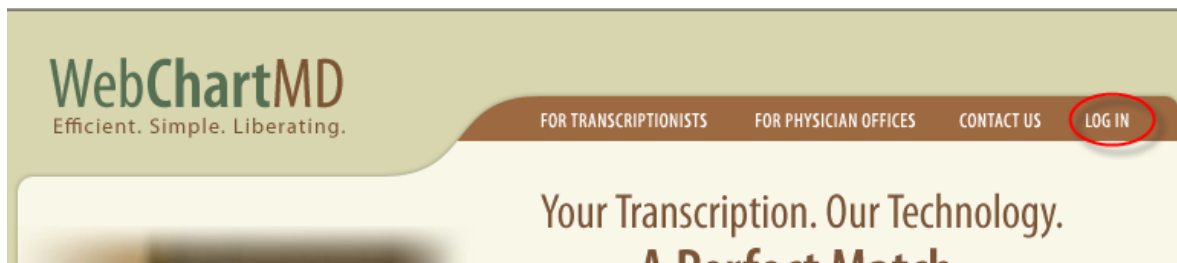


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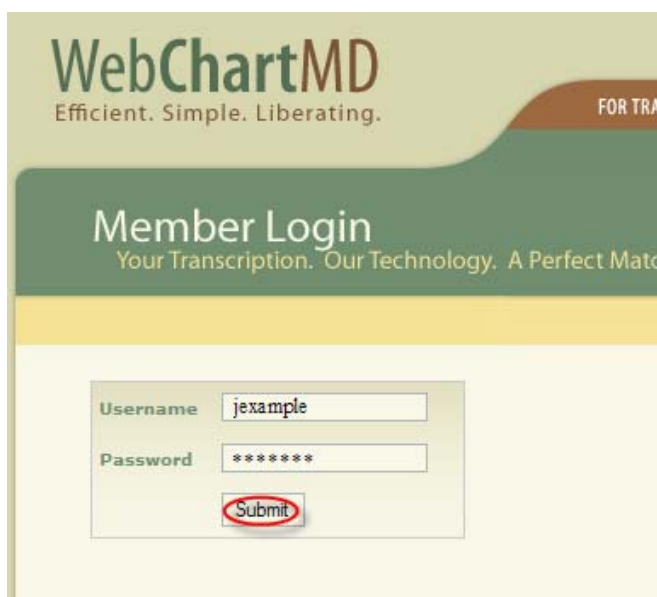
- When the installation finishes click the “Close” button to complete the installation

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.

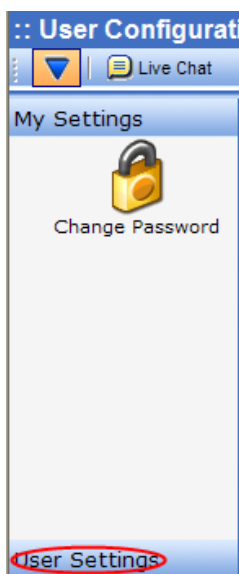


Upon successful log-in look to the top right hand corner. There will be a link that says “Settings”- click that link.



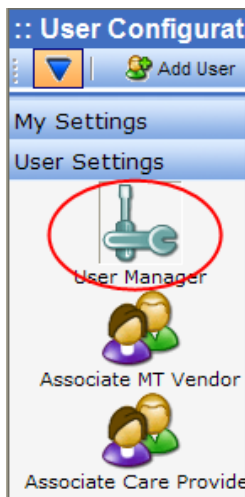
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On the next page, look to the very bottom left corner. There is a tab called “User Settings”. - Click that tab. The menu that will allow changes to be made to user settings/preferences is now visible.



- 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”.

User Account [cancel] (save)

Username:

Password:

Re-type Password:

User Type

☐ Care Provider ☐ Office Manager

☐ Office Staff

User Permissions

☐ Approve ☐ Reject

☐ Upload ☐ Delete

☐ Edit ☐ Play

☐ Print ☐ Open

User Information

Title:

First name:

Middle name:

Last name:

Address 1:

Address 2:

City:

State:

Zip:

Work Phone:

Fax:

Mobile Phone:

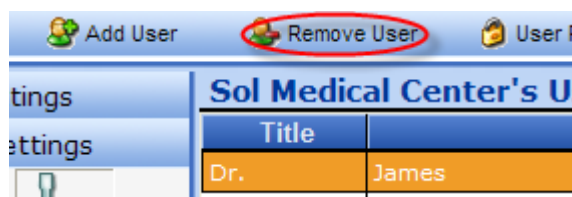
Home Phone:

Email:

SMS Email:

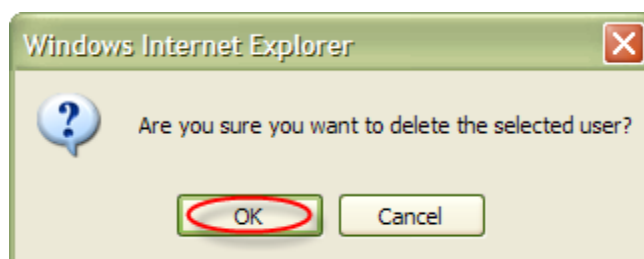
b. Removing Users

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.



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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.

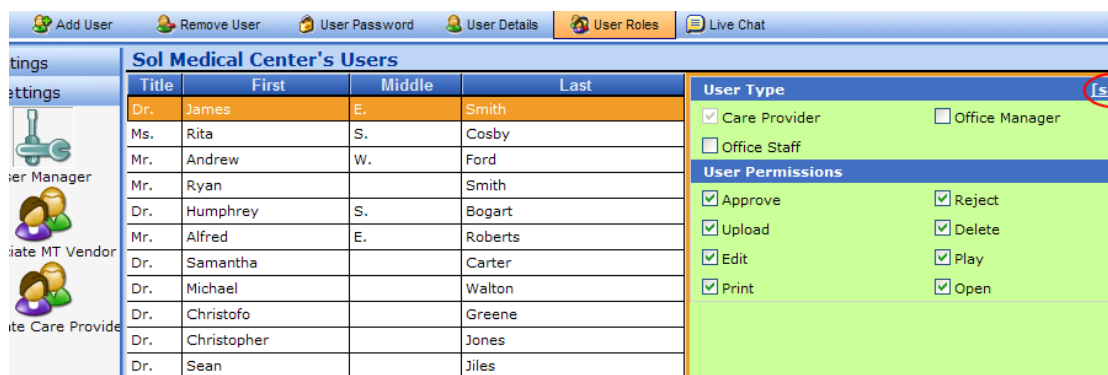


c. Changing user Roles

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.



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

Sol Medical Center's Users

Title	First	Middle	Last
Dr.	James	E.	Smith
Ms.	Rita	S.	Cosby
Mr.	Andrew	W.	Ford
Mr.	Ryan		Smith
Dr.	Humphrey	S.	Bogart
Mr.	Alfred	E.	Roberts
Dr.	Samantha		Carter
Dr.	Michael		Walton
Dr.	Christofo		Greene
Dr.	Christopher		Jones
Dr.	Sean		Jiles

User Information

Title:

First name:

Middle name:

Last name:

Address 1:

Address 2:

City:

State:

Zip:

Work Phone:

Fax:

Mobile Phone:

Home Phone:

Email:

SMS Email:

[Save](#)

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.

Sol Medical Center's Users

Title	First
Dr.	James

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

Sol Medical Center's Users

Title	First	Middle	Last
Dr.	James	E.	Smith
Ms.	Rita	S.	Cosby
Mr.	Andrew	W.	Ford
Mr.	Ryan		Smith
Dr.	Humphrey	S.	Bogart

User Account

Username:

Password:

Re-type Password:

[Save](#)

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.

Care Provider	MT Vendor	Description
Dr. James Smith	Sol Medical Center	
Dr. Humphrey Bogart	Beta Transcriptions	
Dr. Samantha Carter	Beta Transcriptions	
Dr. Michael Walton	Beta Transcriptions	
Dr. Christofo Greene	Beta Transcriptions	
Dr. Christopher Jones	Beta Transcriptions	

MT Vendor Details
 Name: Sol Medical Center
 Description:
 Address 1:
 Address 2:
 City:
 State:
 Zip:
 Phone 1:
 Phone 2:
 Fax:
 Website:
 Email:

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.

Care Provider	MT Vendor	Description
Dr. James Smith	Sol Medical Center	
Dr. Humphrey Bogart	Beta Transcriptions	
Dr. Samantha Carter	Beta Transcriptions	
Dr. Michael Walton	Beta Transcriptions	
Dr. Christofo Greene	Beta Transcriptions	
Dr. Christopher Jones	Beta Transcriptions	

Change MT Vendor [search] [save]
 MT Vendor ID: AAAAAAA
MT Vendor Details
 Name: Beta Transcriptions
 Description:
 Address 1:
 Address 2:
 City:
 State:
 Zip:
 Phone 1:
 Phone 2:
 Fax:
 Website:
 Email:

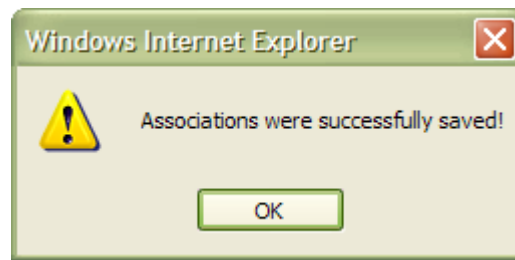
g. Setting CP visibility

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.

Users				Care Providers	
Title	First	Middle	Last	Title	First
Dr.	James	E.	Smith	Dr.	James
Ms.	Rita	S.	Cosby	Dr.	Humphrey
Mr.	Andrew	W.	Ford		

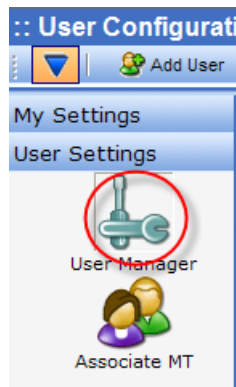
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Once the “Associate Care Provider” button is clicked there will be a pop-up notification saying that the association was successful.



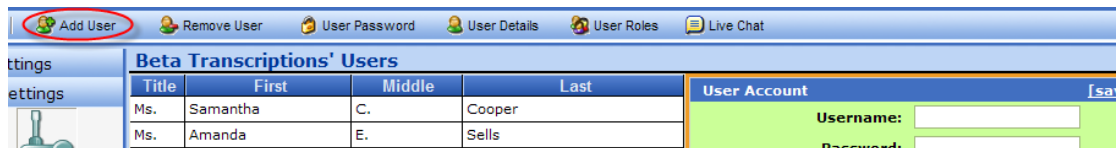
- For MT Vendors

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



a. Adding Users

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



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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.

User Account [cancel] (save)

Username:
Password:
Re-type Password:

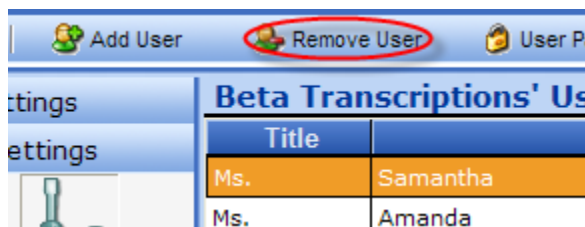
User Type
☐ MT Manager ☐ Transcriptionist

User Permissions
☐ Access Client Folders ☐ Submit Direct
☐ Route Dictations ☐ Can QA
☐ Change Line Count Settings
Default QA Routing: Samantha Coope

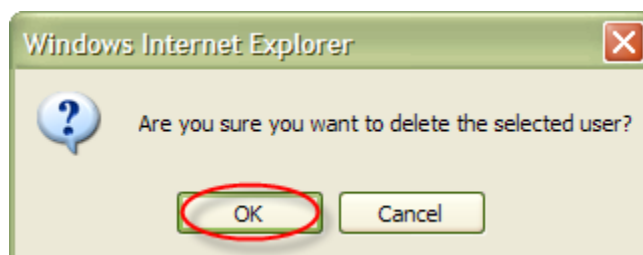
User Information
Title:
First name:
Middle name:
Last name:
Address 1:
Address 2:
City:
State:
Zip:
Work Phone:
Fax:
Mobile Phone:
Home Phone:
Email:
SMS Email:

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.

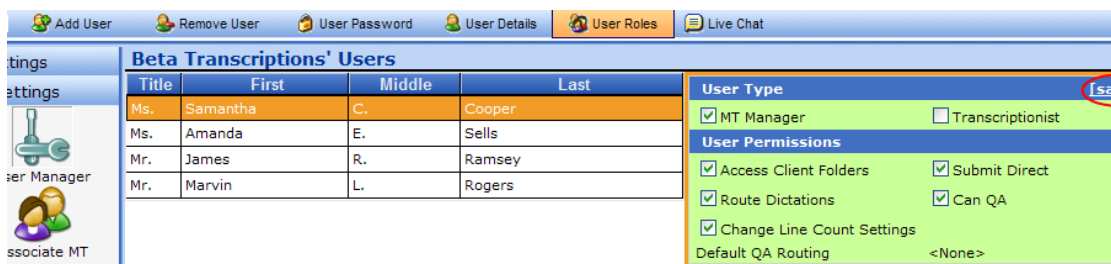


c. Changing User Roles

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.

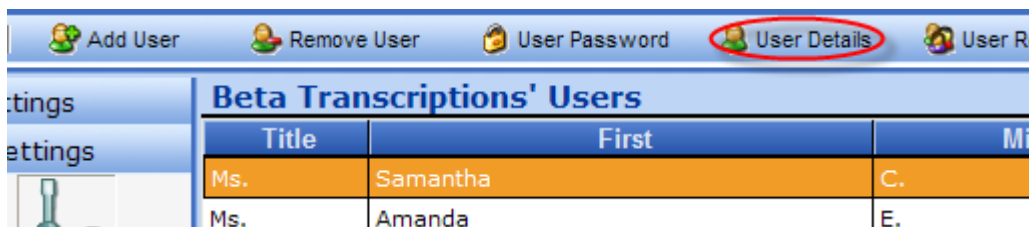


Once the changes to the permissions have been set click the “save” link and the permissions are updated.



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.



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

The screenshot shows the 'Beta Transcriptions' Users page. The top navigation bar includes 'Add User', 'Remove User', 'User Password', 'User Details', 'User Roles', and 'Live Chat'. The left sidebar has 'Settings', 'User Manager', and 'Associate MT'. The main content area features a table of users and a 'User Information' form on the right.

Title	First	Middle	Last
Ms.	Samantha	C.	Cooper
Ms.	Amanda	E.	Sells
	Administrator		
Mr.	James	R.	Ramsey

User Information

Title:

First name:

Middle name:

Last name:

Address 1:

Address 2:

City:

State:

Zip:

Work Phone:

Fax:

Mobile Phone:

Home Phone:

Email:

SMS Email:

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.

The screenshot shows the 'Beta Transcriptions' Users page. The 'User Password' button in the top navigation bar is circled in red. The table below shows the first two rows of the user list.

Title	First
Ms.	Samantha
Ms.	Amanda

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

The screenshot shows the 'Beta Transcriptions' Users page. The 'User Password' button in the top navigation bar is highlighted. The 'User Account' form is displayed on the right side of the page.

Title	First	Middle	Last
Ms.	Samantha	C.	Cooper
Ms.	Amanda	E.	Sells
	Administrator		
Mr.	James	R.	Ramsey

User Account

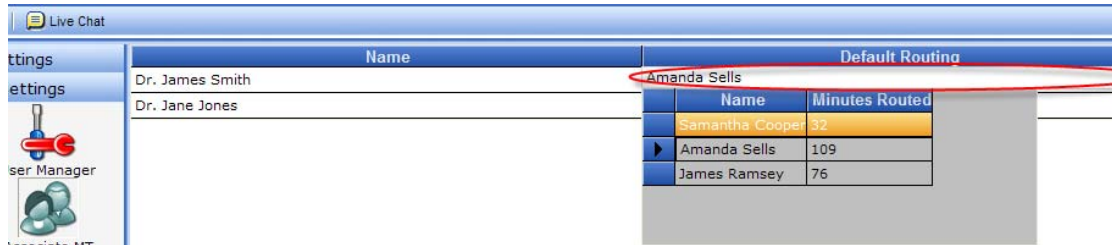
Username:

Password:

Re-type Password:

f. Setting Default Dictation Routing

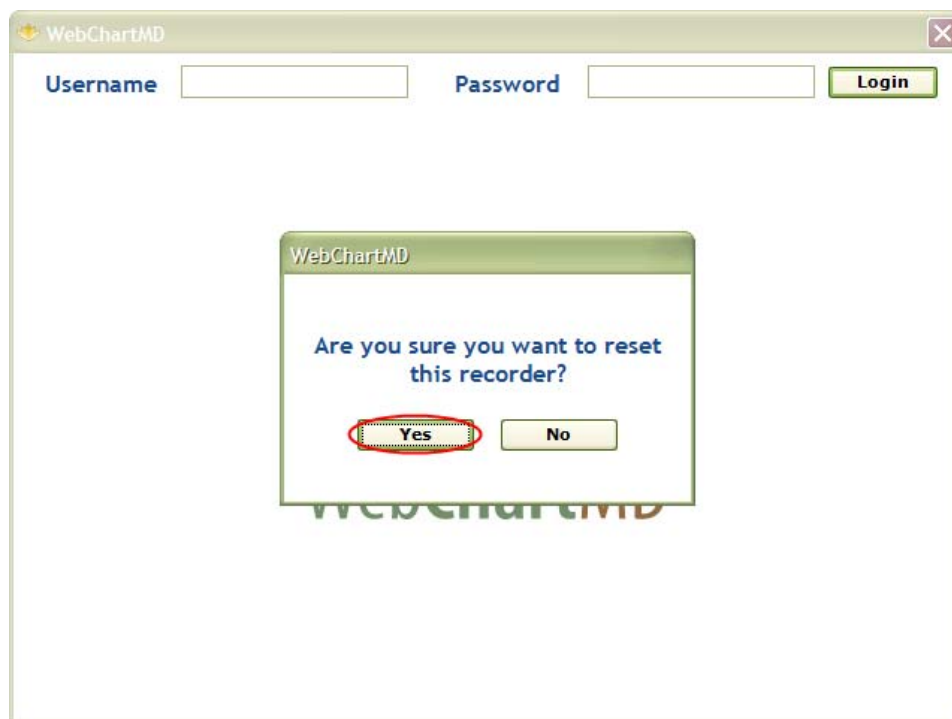
First make sure that no pop-up blocking software is enabled. Second make sure the “Associate MT” option is clicked. Once a care provider is selected, click on the field with the MLS name in it. After that field is clicked, a drop down menu will appear with all the MLS’s available to choose from. Once 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

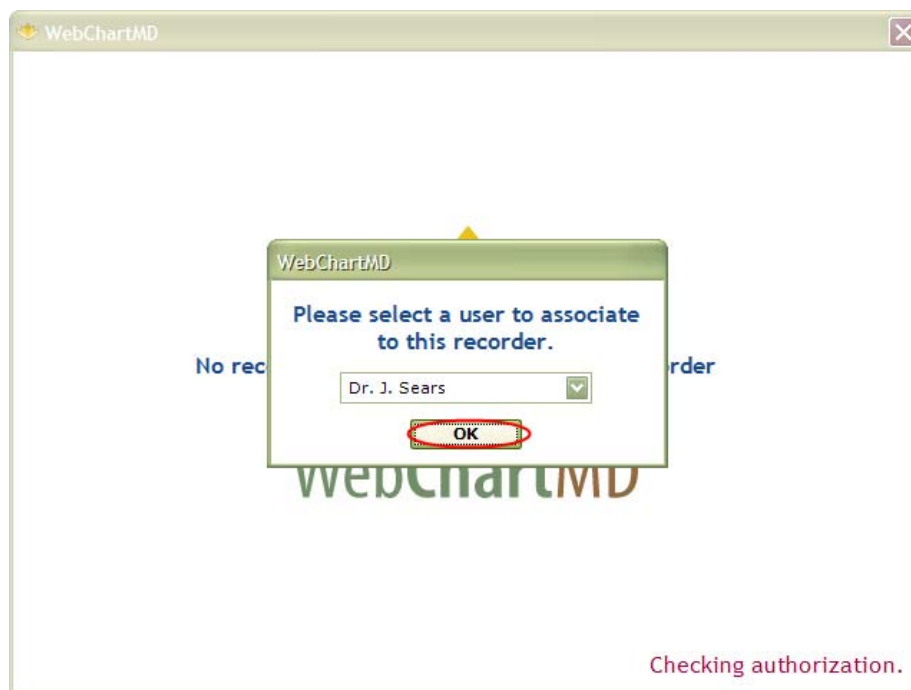
Authorizing recorders for care providers

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.



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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

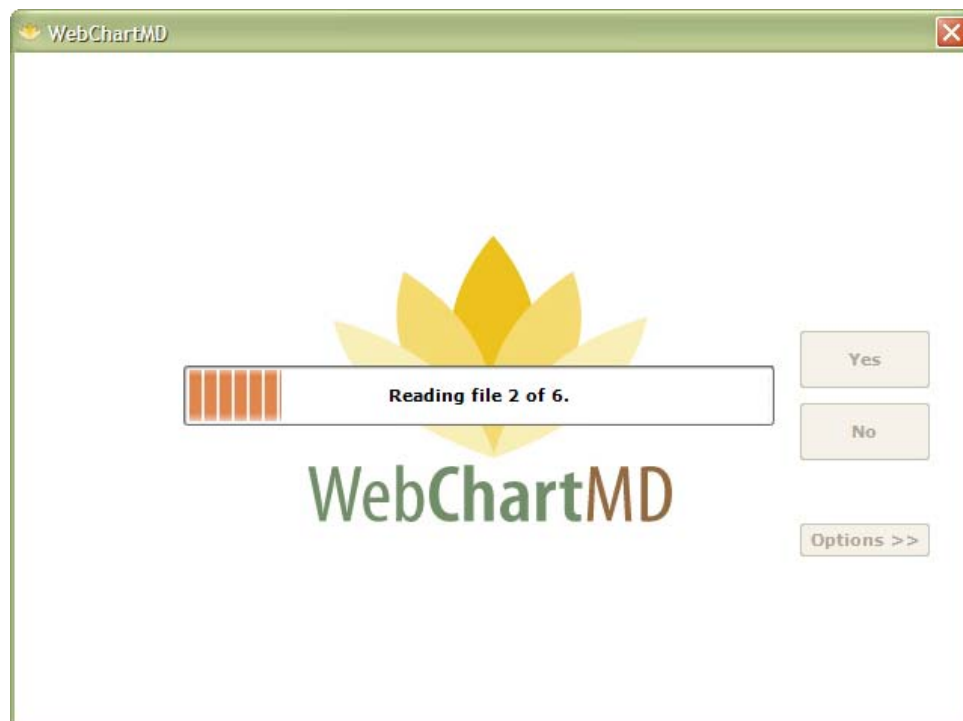
1. Open WebChartMD by double-clicking the desktop icon named “WebChartMD” or by accessing the start menu, click all programs, and then “WebChartMD”. Next, click the “WebChartMD” icon in that directory.

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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.

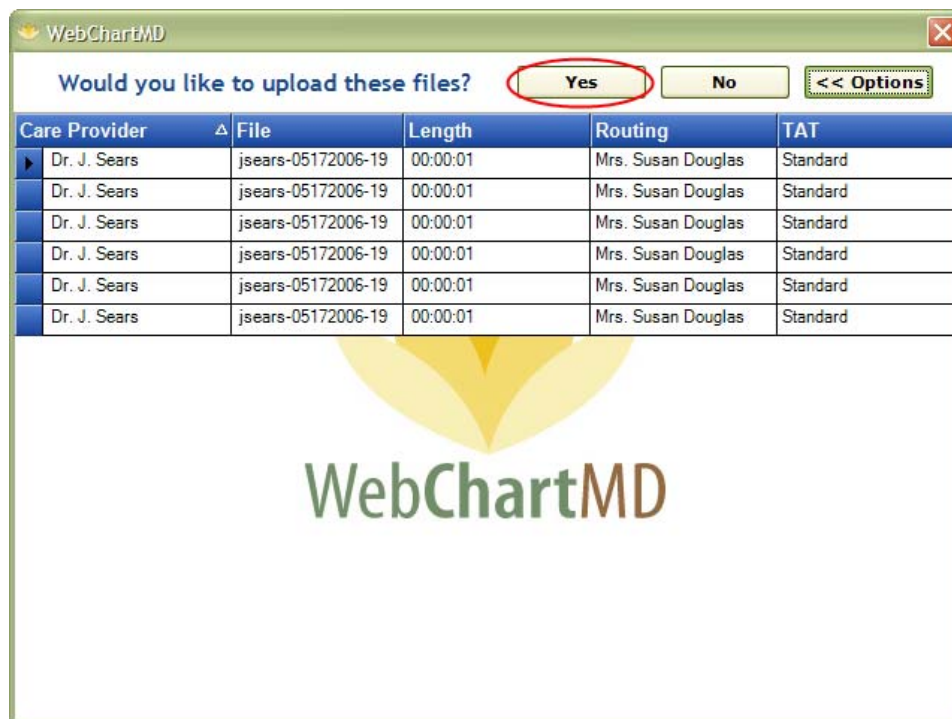


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4. If steps 1 and 2 have been executed properly then this screen should display:



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.

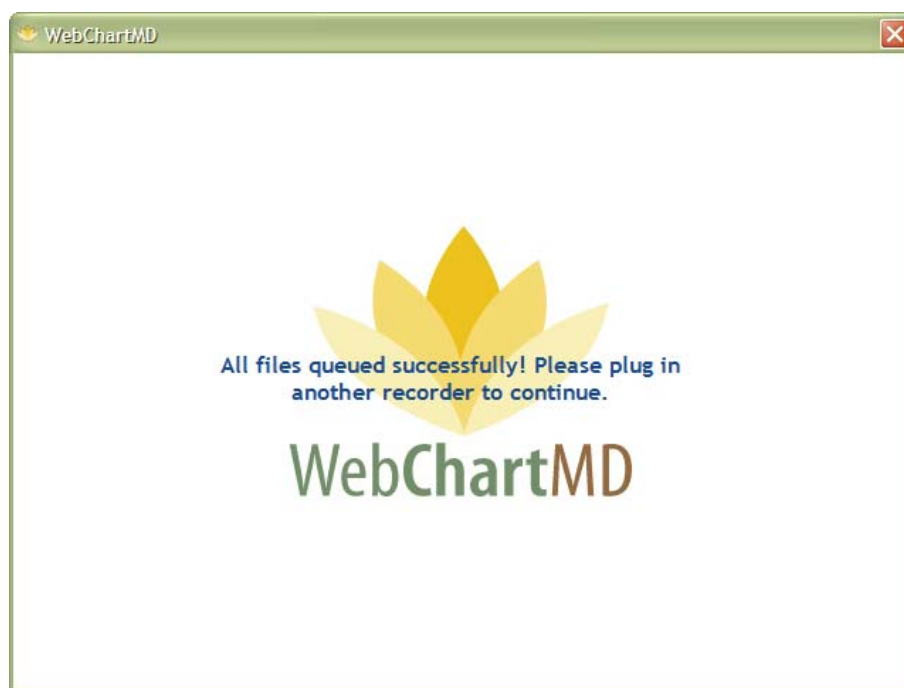


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The recordings can be sorted by any of the headings and the “Routing” (where the document will go) or the “TAT” (turn around time) can be changed by clicking inside the respective field for that document. If either the “Routing” or the “TAT” fields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

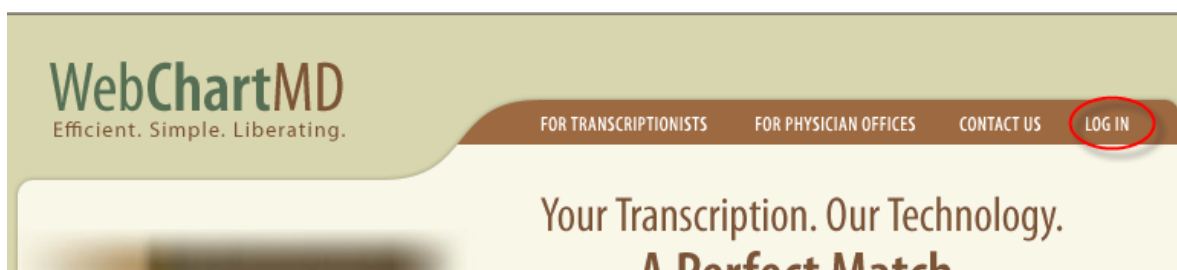
6. Once all the option selections are made the files can be uploaded using the “Yes” button. If everything above has been executed properly a screen similar to the one below should display.

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.



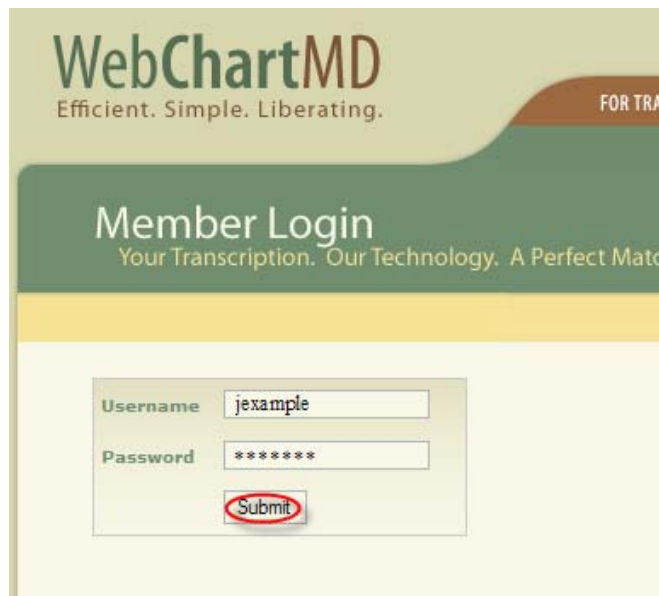
Opening the Web Portal

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



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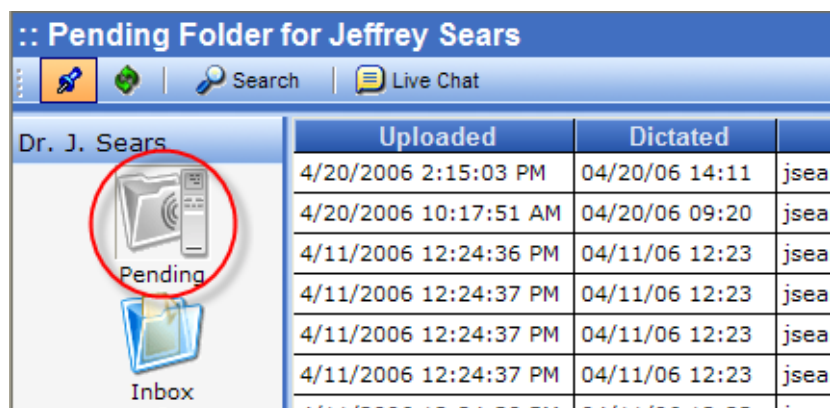
On the next page type a username and password into the fields and click the “Submit” button. If done successfully the view will change. Now the web portal will be in view with the username displaying near the top of the page.



The image shows the WebChartMD Member Login page. At the top, the logo "WebChartMD" is displayed with the tagline "Efficient. Simple. Liberating." and a partial "FOR TRA" label. Below the logo is a green banner with the text "Member Login" and "Your Transcription. Our Technology. A Perfect Match". The login form contains two input fields: "Username" with the value "jexample" and "Password" with the value "*****". A red circle highlights the "Submit" button.

- 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.



The image shows a screenshot of the "Pending Folder for Jeffrey Sears" interface. On the left, a sidebar lists "Dr. J. Sears" and "Pending" (highlighted with a red circle). Below "Pending" is an "Inbox" folder icon. The main area displays a table of audio files with columns for "Uploaded", "Dictated", and a user identifier.

Uploaded	Dictated	
4/20/2006 2:15:03 PM	04/20/06 14:11	jsear
4/20/2006 10:17:51 AM	04/20/06 09:20	jsear
4/11/2006 12:24:36 PM	04/11/06 12:23	jsear
4/11/2006 12:24:37 PM	04/11/06 12:23	jsear
4/11/2006 12:24:37 PM	04/11/06 12:23	jsear
4/11/2006 12:24:37 PM	04/11/06 12:23	jsear
4/11/2006 12:24:37 PM	04/11/06 12:23	jsear

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 be 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.

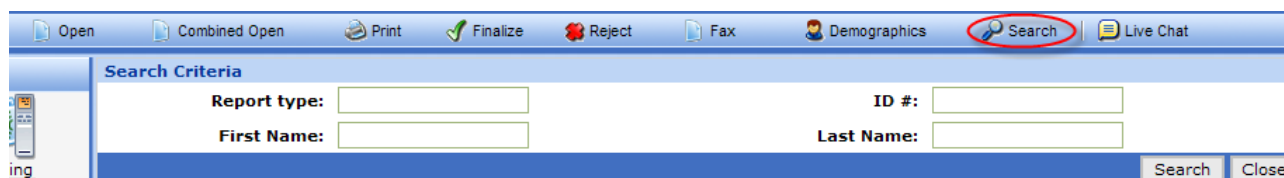
Inbox Folder for Jeffrey Sears

Open Combined Open Print Finalize Reject Fax Demographics Search

Dictated	Uploaded	Finished	First	Last	ID #	DOV	D
04/11/06 11:24	04/11/06 11:44	04/20/06 07:21	John	Thomas	09876	04/20/06	11/1
04/09/06 12:36	04/11/06 12:32	04/19/06 02:28	David	Steward	12340-111	12/31/99	05/1
04/07/06 10:26	04/07/06 10:30	04/19/06 06:03	David	steward	12340-111	12/31/99	05/1
04/04/06 11:49	04/04/06 12:15	04/11/06 11:25	Joshua	Smith	21134	04/10/06	12/0
04/04/06 11:49	04/04/06 12:15	04/11/06 12:15	Percy	Garner	78551	04/10/06	10/0
03/28/06 12:37	03/28/06 13:01	03/28/06 13:18	Joshua	Smith	21134	03/27/06	12/0
03/28/06 12:37	03/28/06 13:01	03/29/06 20:15	Sample	Sam	88473	03/28/06	09/1

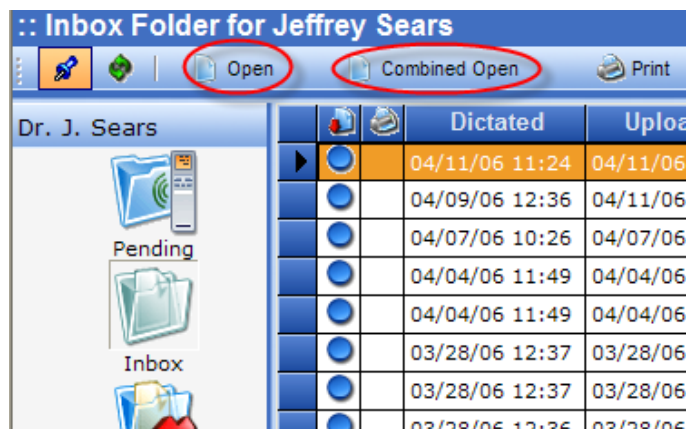
a. Searching for a Document

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.



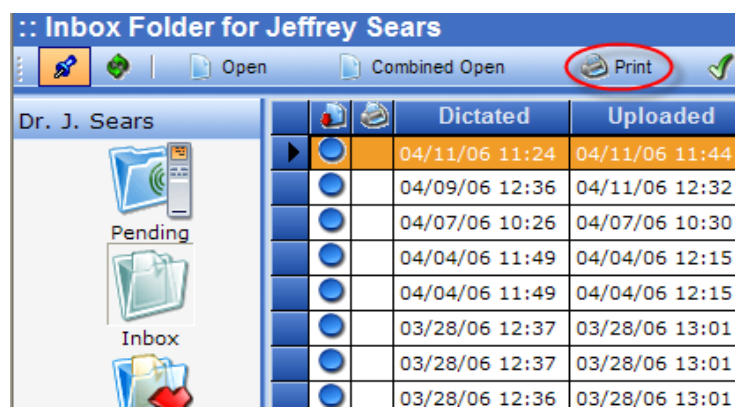
b. Opening a Document

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.



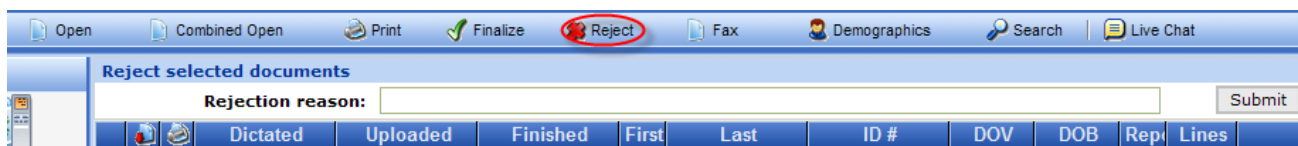
c. Printing a Document

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.



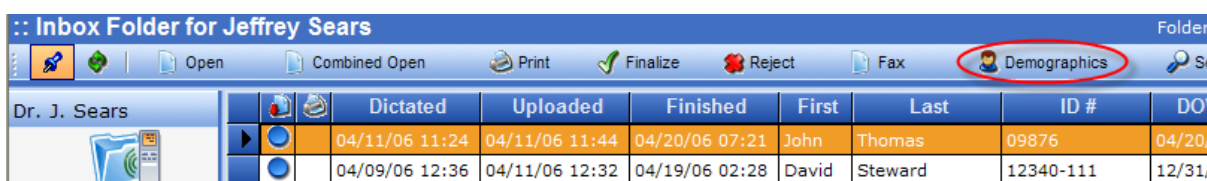
d. Rejecting a Document

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.

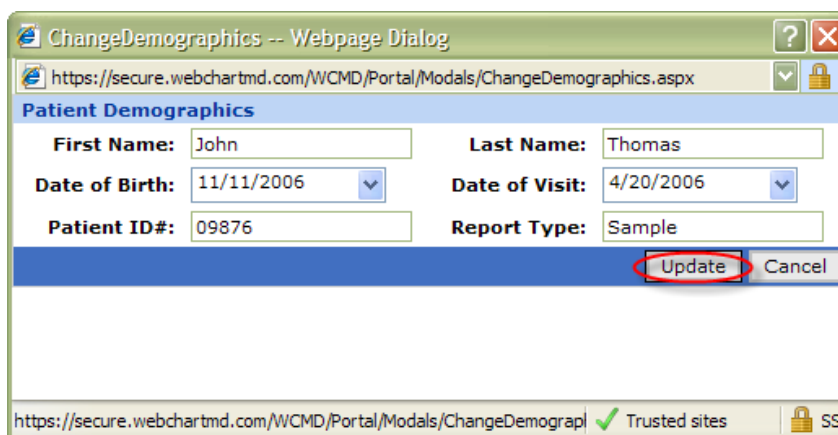


e. Updating/Changing Demographics

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

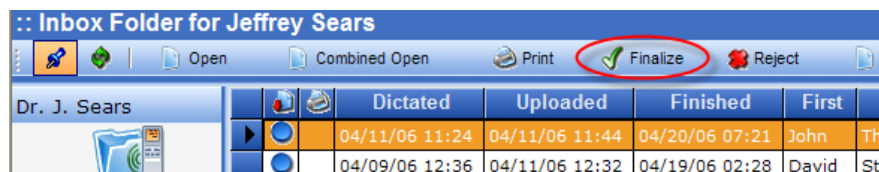


When the button is clicked a pop-up box will prompt for a change to the demographic information associated with that file. After the information has been changed click the “Update” button.



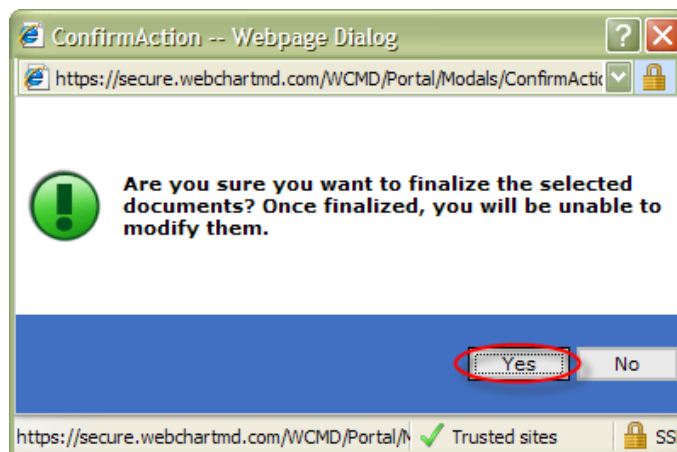
f. Finalizing a Document

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.



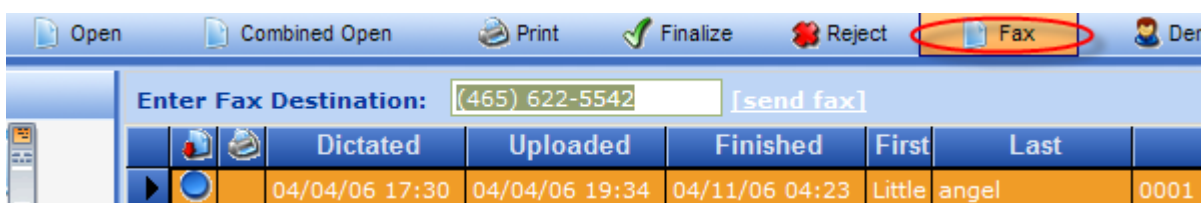
WebChartMD

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.

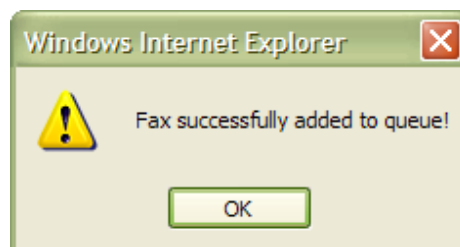


g. Faxing a Document

First in order to fax a document make sure that no pop-up blocking software is 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

WebChartMD

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.

Uploaded	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

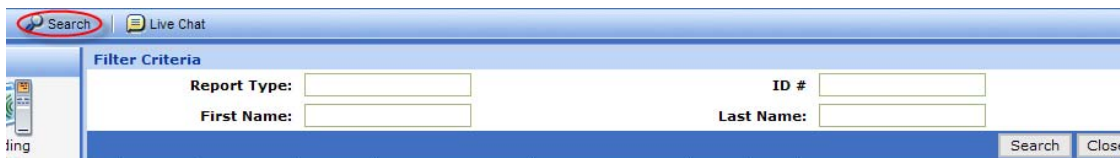
This folder contains all the items that have been received from the transcriptionist or rejected because of erroneous material. All of the same information about a file that could be viewed in the inbox is displayed here except for the report type which is replaced by the rejection reason in this folder.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

Rejected Folder for Jeffrey Sears			
Dr. J. Sears			
	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

WebChartMD

a. Searching for a Document

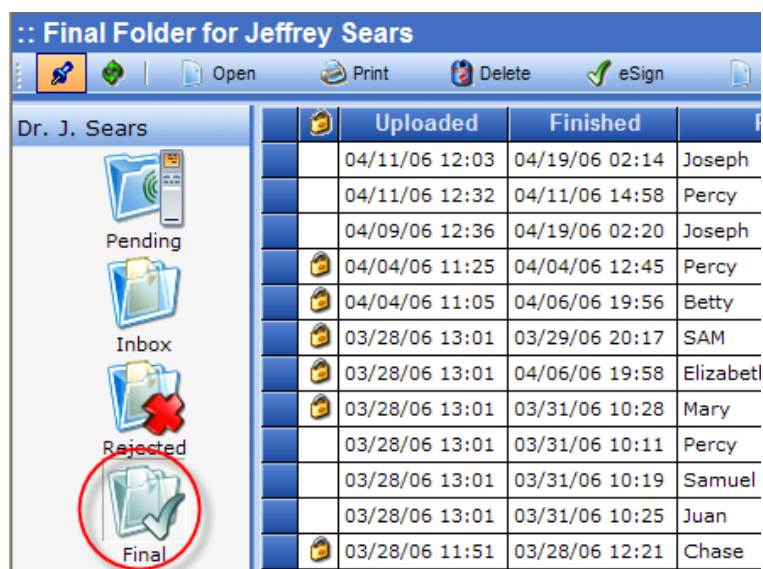
To search for a document click the “Search” button on the main menu and enter the parameters to be used. Once either a report type, first name, last name or an ID # have been entered- click the “Search” button.



The image shows the top section of the WebChartMD application. At the top left, there is a 'Search' button circled in red and a 'Live Chat' button. Below these is a 'Filter Criteria' section with four input fields: 'Report Type:', 'ID #', 'First Name:', and 'Last Name:'. At the bottom right of this section are 'Search' and 'Close' buttons.

- 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.



The image shows a window titled 'Final Folder for Jeffrey Sears'. It has a toolbar with icons for 'Open', 'Print', 'Delete', and 'eSign'. On the left is a sidebar with folder icons: 'Pending', 'Inbox', 'Rejected', and 'Final'. The 'Final' folder is circled in red. The main area is a table with columns for document status and patient information.

	Uploaded	Finished	
	04/11/06 12:03	04/19/06 02:14	Joseph
	04/11/06 12:32	04/11/06 14:58	Percy
	04/09/06 12:36	04/19/06 02:20	Joseph
	04/04/06 11:25	04/04/06 12:45	Percy
	04/04/06 11:05	04/06/06 19:56	Betty
	03/28/06 13:01	03/29/06 20:17	SAM
	03/28/06 13:01	04/06/06 19:58	Elizabeth
	03/28/06 13:01	03/31/06 10:28	Mary
	03/28/06 13:01	03/31/06 10:11	Percy
	03/28/06 13:01	03/31/06 10:19	Samuel
	03/28/06 13:01	03/31/06 10:25	Juan
	03/28/06 11:51	03/28/06 12:21	Chase

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

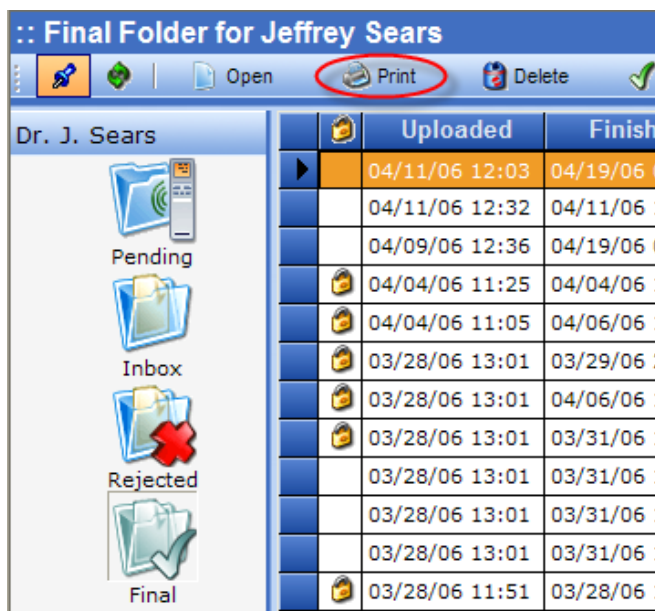
By selecting a single line or multiple lines, or by control clicking them or shift clicking them, documents can be opened. Once the documents that need to be opened are selected, open them by clicking the “Open” button. All selected documents will be opened at the same time as different word documents,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

:: Final Folder for Jeffrey Sears

	Uploaded	Finished	
04/11/06 12:03	04/19/06 02:14	Joseph	
04/11/06 12:32	04/11/06 14:58	Percy	
04/09/06 12:36	04/19/06 02:20	Joseph	
04/04/06 11:25	04/04/06 12:45	Percy	
04/04/06 11:05	04/06/06 19:56	Betty	
03/28/06 13:01	03/29/06 20:17	SAM	
03/28/06 13:01	04/06/06 19:58	Elizabeth	
03/28/06 13:01	03/31/06 10:28	Mary	
03/28/06 13:01	03/31/06 10:11	Percy	
03/28/06 13:01	03/31/06 10:19	Samuel	
03/28/06 13:01	03/31/06 10:25	Juan	
03/28/06 11:51	03/28/06 12:21	Chase	

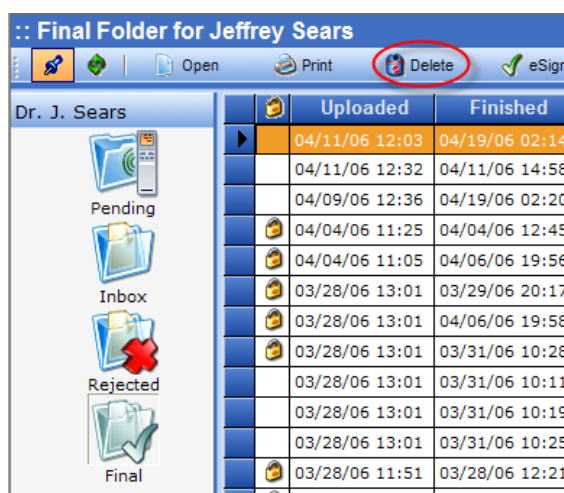
c. Printing a Document

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.

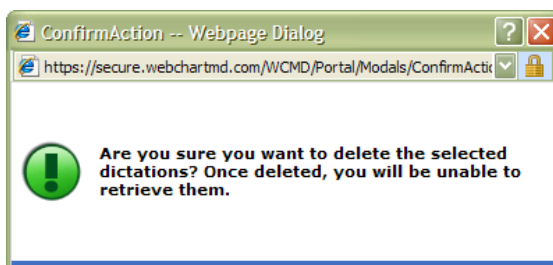


d. Deleting a Document

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 will not be recoverable.

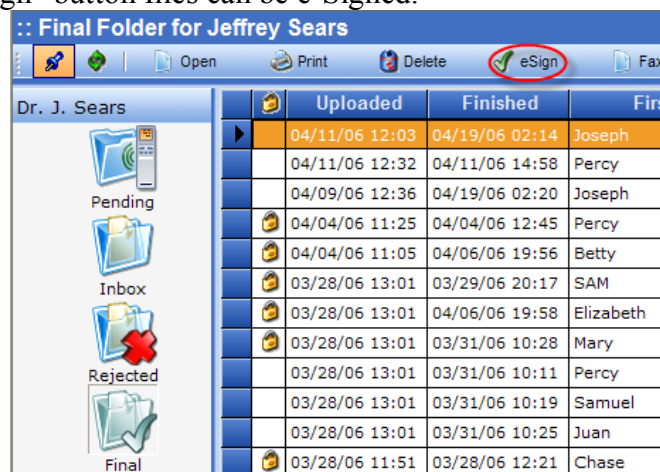


When the files that need to be deleted are selected and the "Delete" button is clicked a confirmation dialog box will display. Press the "Yes" button in this dialog box to complete the deletion.

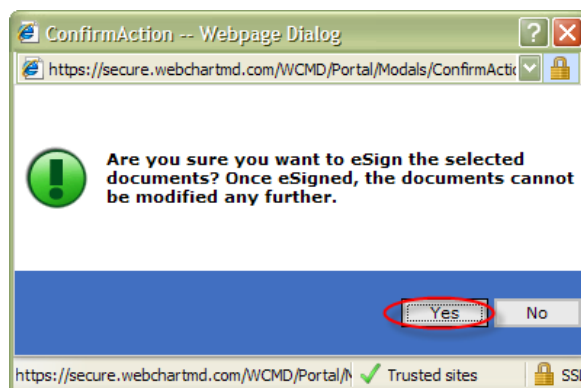


e. e-Signing a Document

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.

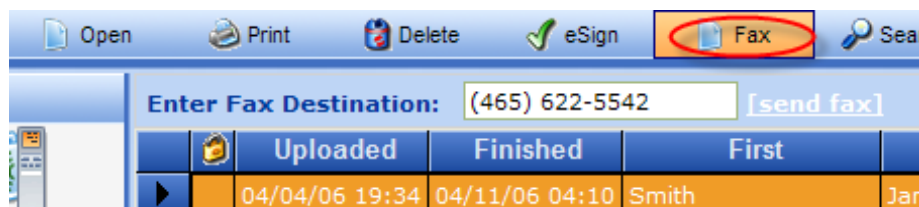


Once the files are selected that need to be e-Signed, click the “e-Sign” button. Then a confirmation dialog box will display. Click the “Yes” button in this dialog box to complete the e-Signing process.



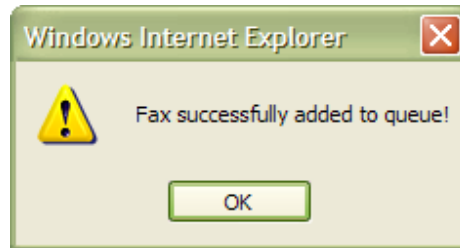
f. Faxing a Document

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



WebChartMD

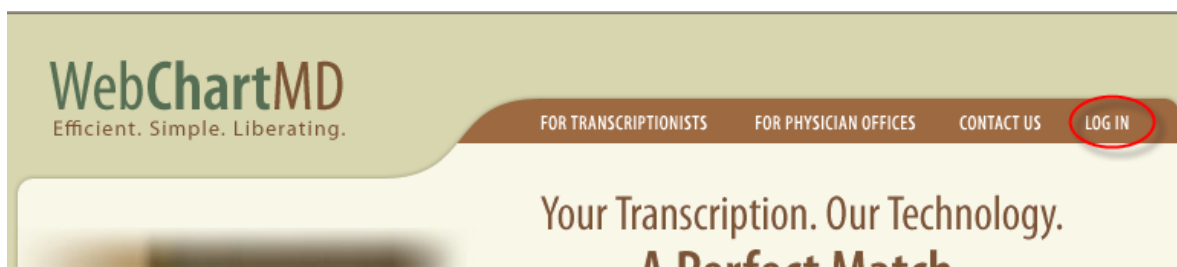
Once the files that need to be faxed have been selected, a fax number has been entered and the “Send Fax” link has been clicked a pop-up notification will come up. This pop-up states that the document has been added to the fax queue. To close the notification window click the “OK” button.



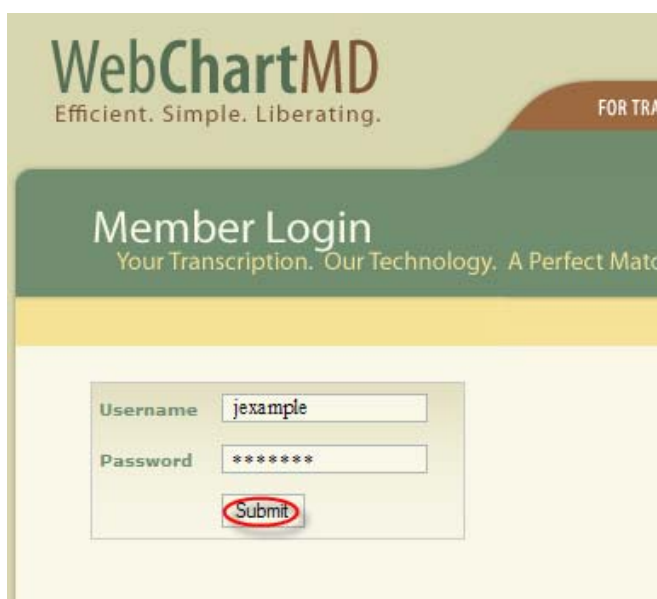
Using WebChartMD – For the MT Vendor

Opening the Web Portal

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

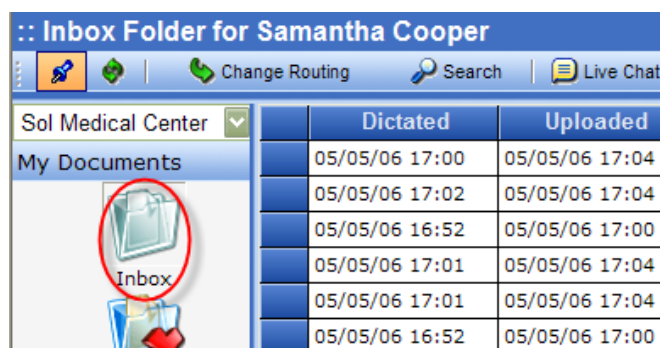


Then on the next page type a username and password into the fields and click the “Submit” button. If done successfully the view will change and the web portal will be displayed with a username displaying near the top of the page.

A screenshot of the WebChartMD Member Login page. The header shows the WebChartMD logo and tagline. Below the header, the text "Member Login" is displayed, followed by the tagline "Your Transcription. Our Technology. A Perfect Match". The main content area contains a login form with two input fields: "Username" with the text "jexample" and "Password" with masked characters "*****". Below the password field is a "Submit" button, which is circled in red.

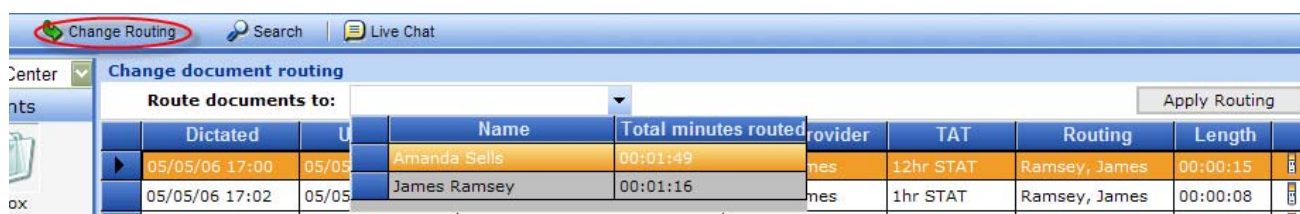
- The Inbox Folder

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.

Change Routing **Search** Live Chat

Center **Search Criteria**

Care Provider First Name: Care Provider Last Name:

Uploaded From: Uploaded To:

Filename:

Search Close

- 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.

:: Rejected Folder for Samantha Cooper

Submit Change Routing Demographics

Dictated	Uploaded	Rejected
01/02/05 00:28	03/21/06 23:32	04/12/06 01

My Documents

Inbox

Rejected

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.

Submit **Change Routing** Demographics Search Live Chat

Center **Change document routing**

Route documents to: Apply Routing

Dictated	Uplo	Name	Total minutes routed	DOV	DOB	Care Provider	Routing
01/02/05 00:28	03/21/06	Amanda Sells	00:01:49	2	04/12/06	02/29/2004	Smith, James
		James Ramsey	00:01:16				Cooper, Samanti

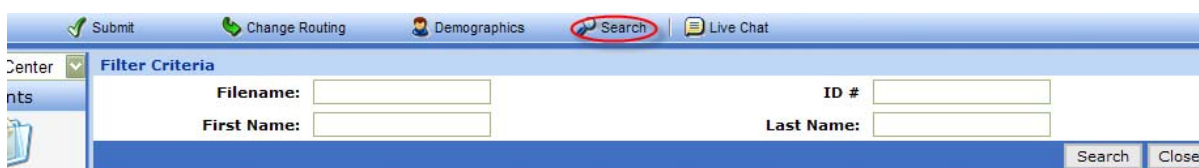
WebChartMD

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



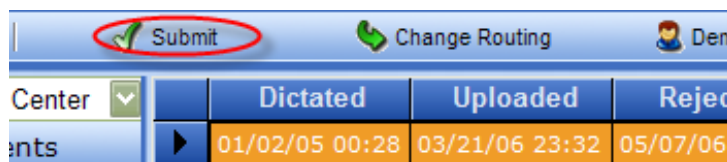
b. Searching for a Transcription

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.



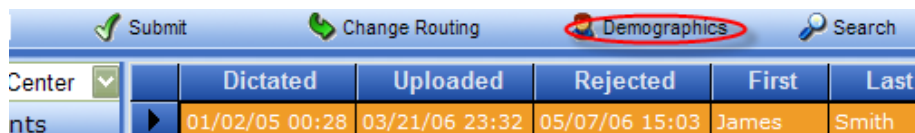
c. Submitting an Updated Transcription

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

WebChartMD

changes have been made click the “Update” button and the changes are made on the server.

ChangeDemographics -- Webpage Dialog

http://secure.webchartmd.com/WCMD_Test/Portal/Modals/ChangeDemographics.aspx

Patient Demographics

First Name: James Last Name: Smith

Date of Birth: 2/29/2004 Date of Visit: 4/12/2006

Patient ID#: 23000012 Report Type: Admission

Update Cancel

http://secure.webchartmd.com/WCMD_Test/Portal/Modals/ChangeDemo Trusted sites

- 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.

QA Folder for Samantha Cooper

Submit Demographics Search

Sol Medical Center

Dictated	Routed	P
01/02/05 00:28	04/06/06 11:10	04/1

My Documents

Inbox

Rejected

QA Items

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.

Submit Demographics Search Live Chat

Center Search Criteria

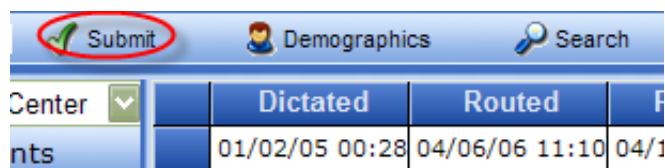
Filename: ID #

First Name: Last Name:

Search Close

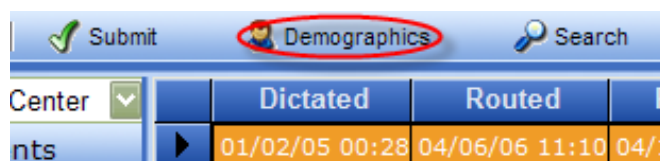
b. Submitting a Transcription

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.

 A screenshot of a web browser window displaying a 'ChangeDemographics' dialog box. The title bar says 'ChangeDemographics -- Webpage Dialog'. The address bar shows 'http://secure.webchartmd.com/WCMD_Test/Portal/Modals/ChangeDemographics.aspx'. The dialog has a blue header with the text 'Patient Demographics'. Below this are several input fields: 'First Name' (Merlin), 'Last Name' (Sheeba), 'Date of Birth' (7/8/2005), 'Date of Visit' (4/12/2006), 'Patient ID#' (000002), and 'Report Type' (Admission). At the bottom right, there are two buttons: 'Update' (circled in red) and 'Cancel'. The status bar at the bottom of the browser window shows 'http://secure.webchartmd.com/WCMD_Test/Portal/Modals/ChangeDemo' and a green checkmark with the text 'Trusted sites'.

WebChartMD

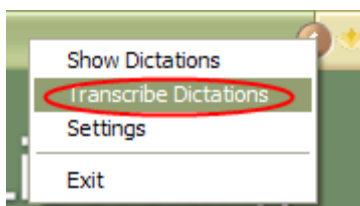
Using the desktop client

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.



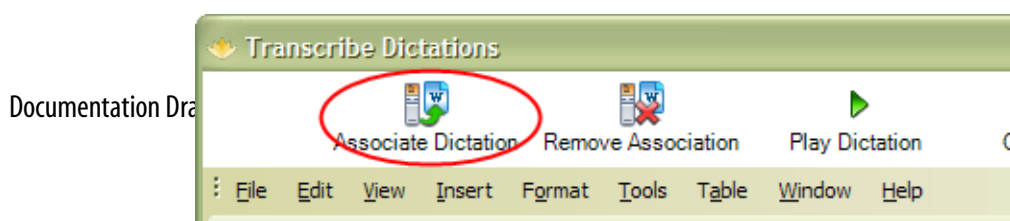
- Transcribing a document using WebChartMD

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



a. Associating a Dictation

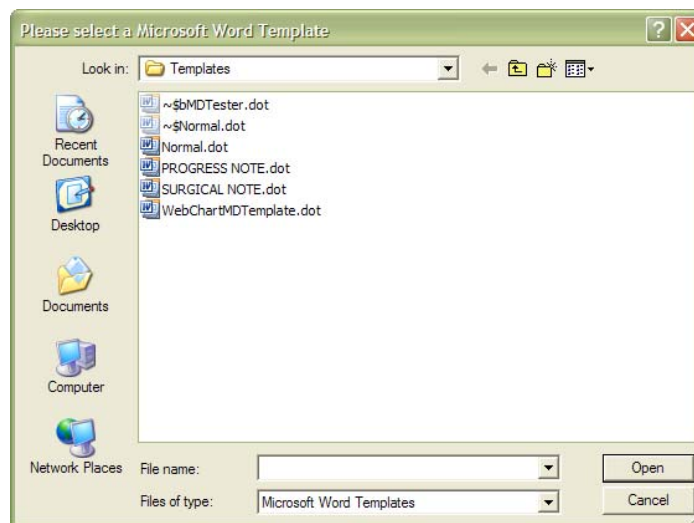
A word document can be associated to a dictation by clicking “Associate Dictation” button in the menu or by pressing ctrl+alt+a.



WebChartMD

To associate a dictation:

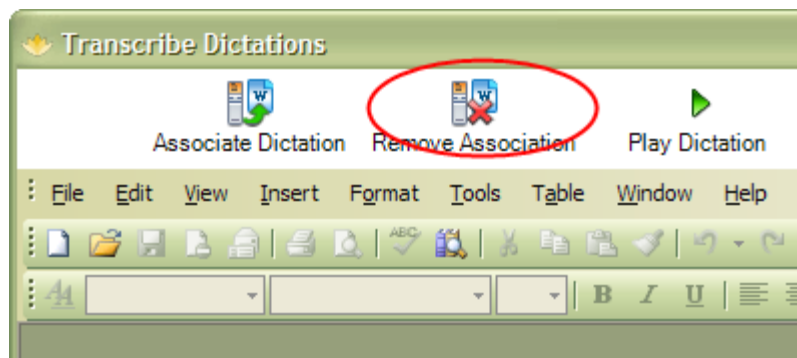
1. Click “Associate Dictation” or press ctrl+alt+a and a dialog box will come up
2. Select the dictation which needs to be transcribed and click “associate.” If the program is set to use the default template then it will automatically use that template but if it has not been selected, it will bring up 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.



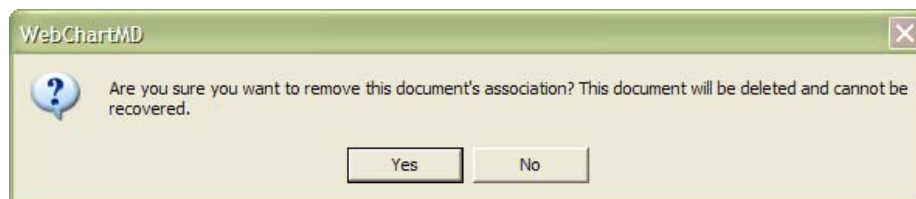
b. Removing an Association

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

WebChartMD

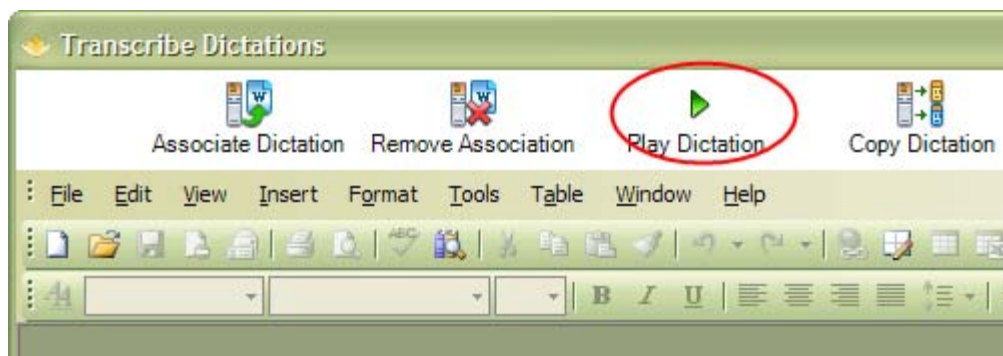


Once “Remove Association” has been clicked or ctrl+alt+r has been pressed a prompt will come up asking for confirmation of the association removal and informing the user that the word document will be deleted.



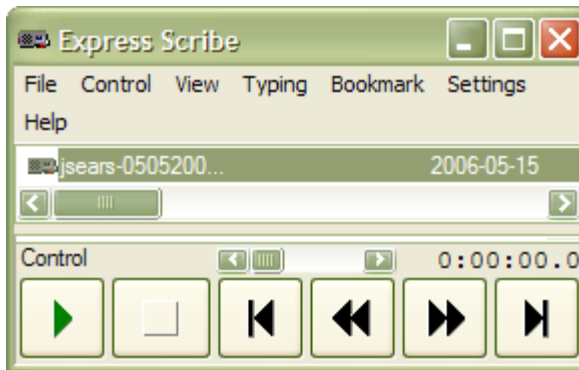
c. Playing a Dictation

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



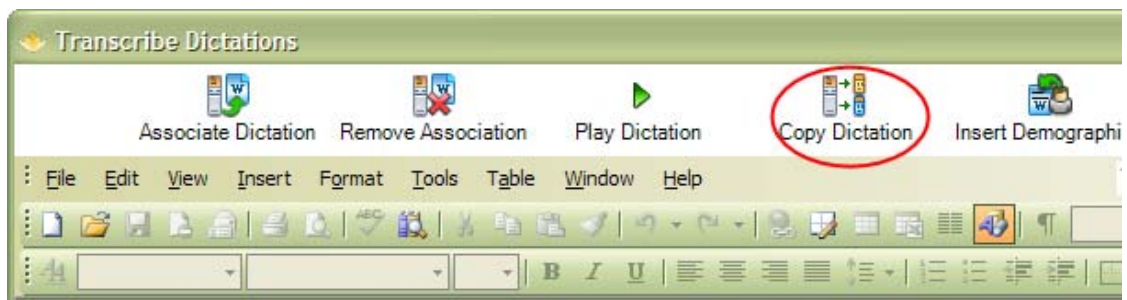
When “Play Dictation” is clicked or ctrl+alt+p is pressed the audio player will be launched and all the normal tasks can be performed on the audio file such as play, rewind, fast forward, etc.

WebChartMD

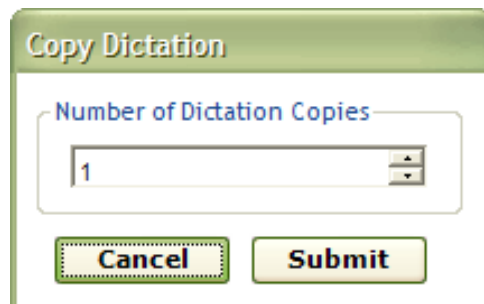


d. Copying a Dictation

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

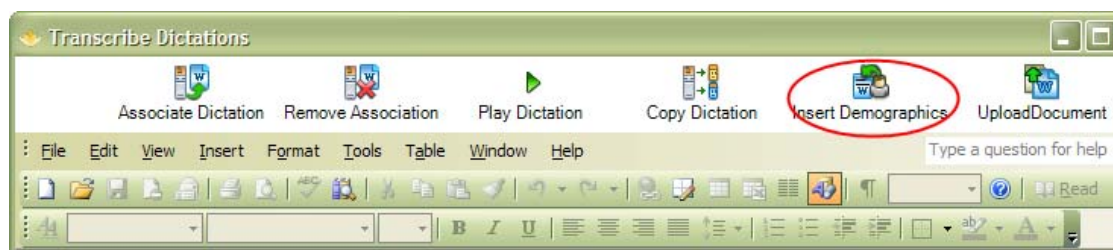


When a dictation is copied a small dialog box will prompt the user to enter the number of dictation copies the user would like to make. This feature is largely useful when a care provider dictates more than one patient’s information in the same audio file. Once the number of copies has been entered click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

The 'Insert Demographics' dialog box is shown. It has a title bar with a close button. Below the title bar is a search section with the label 'Search:' and a text input field containing 'Doe'. To the right of the input field is a 'Search' button. At the bottom of the dialog are 'Cancel' and 'Insert' buttons.

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.

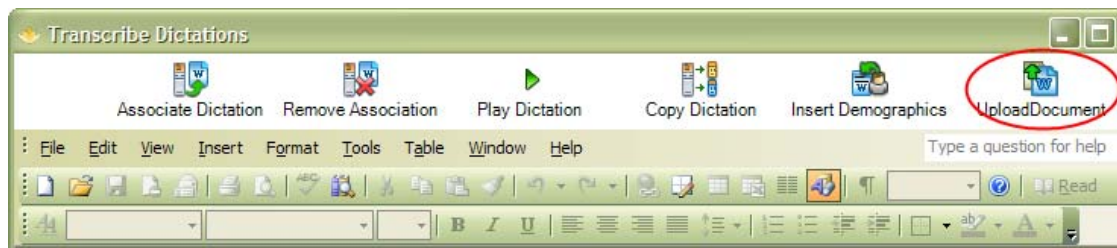
The 'Insert Demographics' dialog box is shown with search results. The search field contains 'doe'. Below the search field is a table with four columns: Patient ID, First Name, Last Name, and Date of Birth. The first row is highlighted with a mouse cursor. At the bottom are 'Cancel' and 'Insert' buttons.

Patient ID	First Name	Last Name	Date of Birth
00124	John	Doe	11/11/1987
3455346636	John	Doe	11/11/1987
34983598	Jane	Doe	11/11/1987
948MRT	John	Doe	11/11/1987
222-11-1122	JOHN	DOE	11/11/1987
311-23-1245	JOHN	DOE	11/11/1987

WebChartMD

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.

Upload Document

Patient ID#: 11554

Date of visit: 05/22/2006

Date of birth:

Report Type: Office Note

First name: Jane

Last name: Doe

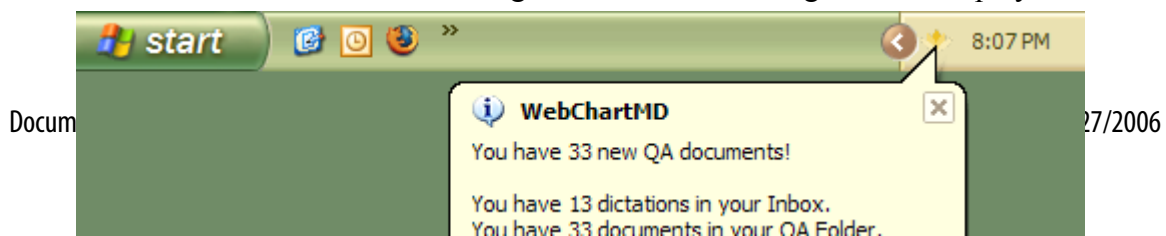
Route To Quality Assurance

Comments:

Cancel Upload

- 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

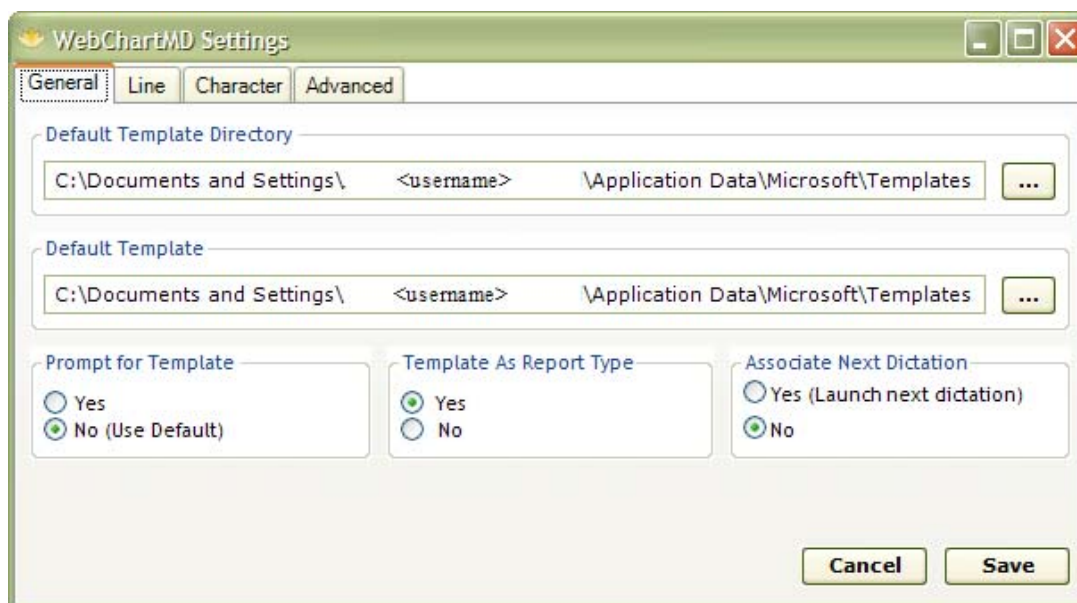


a. Changing the default template directory, the default template and other template settings

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.



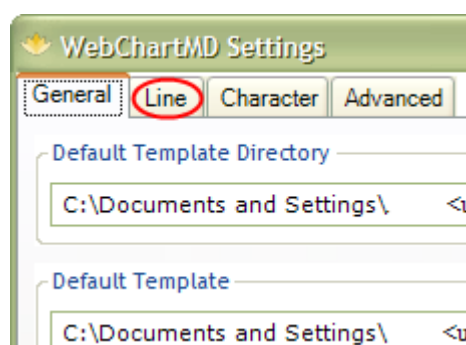
The prompt for template section allows the user to change whether or not the word plug-in will prompt for a template to use when starting a new dictation. The template as report type section decides whether or not the type of template is the report type.

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



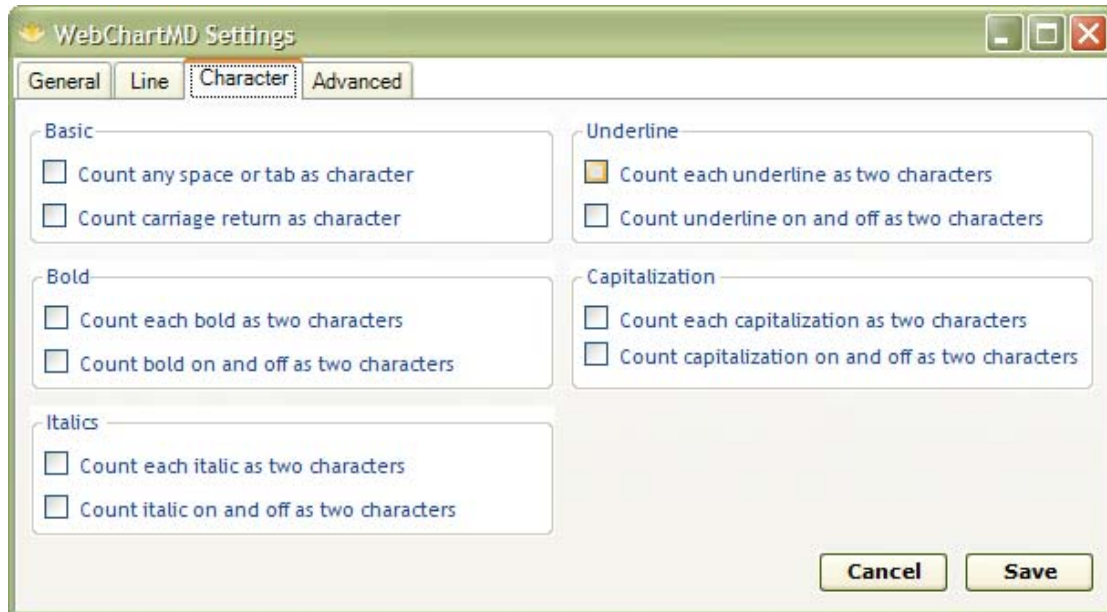
Once the user has clicked the tab the view should change showing new options that allow line count settings to be changed.



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"

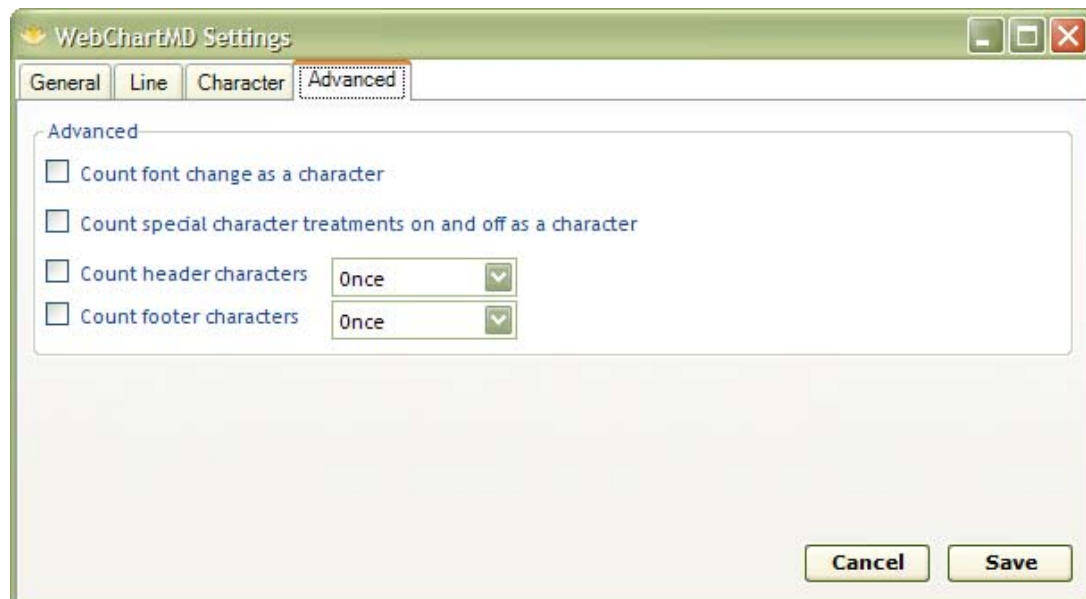
WebChartMD

settings the “Character” and “Advanced” tabs’ options become active. Most of the options within the “Character” and “Advanced” tabs are self explanatory.



The image shows the 'WebChartMD Settings' dialog box with the 'Character' tab selected. The dialog has four tabs: 'General', 'Line', 'Character', and 'Advanced'. The 'Character' tab is active, showing options for counting various formatting elements. The options are organized into four groups: 'Basic', 'Bold', 'Italics', and 'Underline'. Each group contains one or two checkboxes. The 'Underline' group also includes a radio button. At the bottom right are 'Cancel' and 'Save' buttons.

Group	Option	State
Basic	Count any space or tab as character	Unchecked
	Count carriage return as character	Unchecked
Bold	Count each bold as two characters	Unchecked
	Count bold on and off as two characters	Unchecked
Italics	Count each italic as two characters	Unchecked
	Count italic on and off as two characters	Unchecked
Underline	Count each underline as two characters	Checked (Radio)
	Count underline on and off as two characters	Unchecked
Capitalization	Count each capitalization as two characters	Unchecked
	Count capitalization on and off as two characters	Unchecked



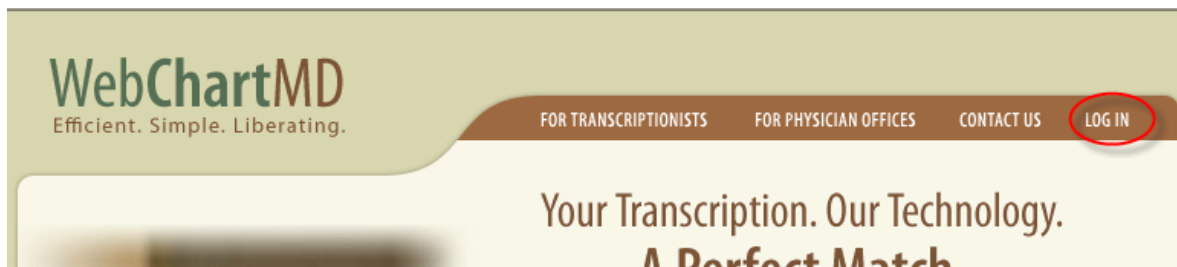
The image shows the 'WebChartMD Settings' dialog box with the 'Advanced' tab selected. The dialog has four tabs: 'General', 'Line', 'Character', and 'Advanced'. The 'Advanced' tab is active, showing options for counting advanced formatting elements. The options are organized into one group: 'Advanced'. Each option is a checkbox followed by a text field and a dropdown menu. At the bottom right are 'Cancel' and 'Save' buttons.

Option	Text Field	Dropdown
Count font change as a character		
Count special character treatments on and off as a character		
Count header characters	Once	▼
Count footer characters	Once	▼

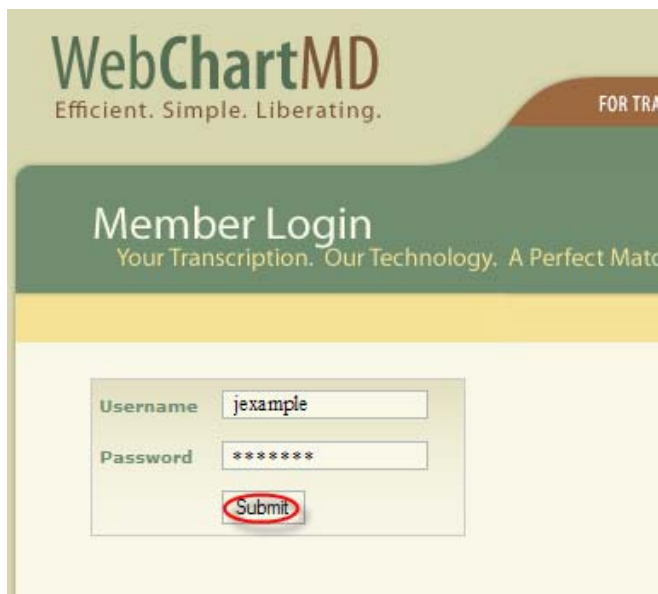
Using WebChartMD – For the MLS

Opening the Web Portal

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

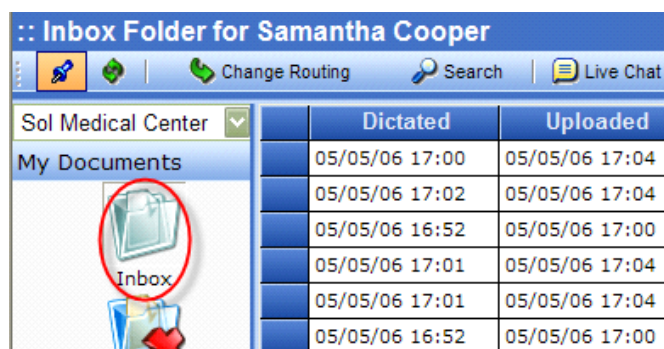


Then on the next page type a username and password into the fields and click the “Submit” button. If the user has done this successfully the view will change and the user will now be in the web portal with the user’s name displaying near the top of the page.



- 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.



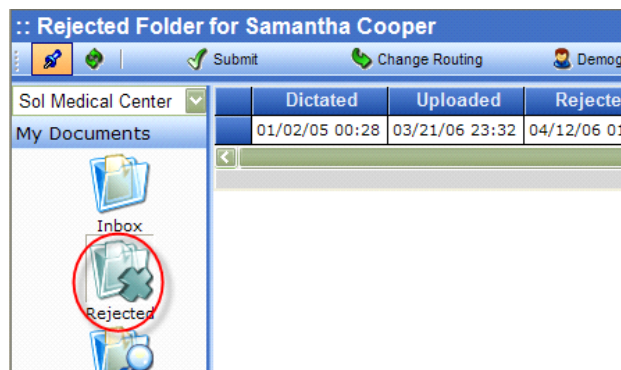
a. Searching for a Dictation

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.

	Dictated	Uploaded	Rejected
	01/02/05 00:28	03/21/06 23:32	05/07/06 15:

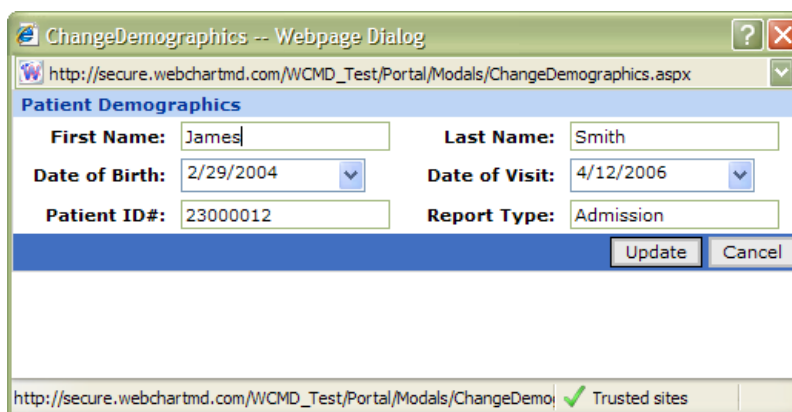
c. Updating/Changing Demographics

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.

	Dictated	Uploaded	Rejected
	01/02/05 00:28	03/21/06 23:32	05/07/06 15:

WebChartMD

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.



The screenshot shows a web browser window titled "ChangeDemographics -- Webpage Dialog". The address bar displays the URL "http://secure.webchartmd.com/WCMD_Test/Portal/Modals/ChangeDemographics.aspx". The main content area is titled "Patient Demographics" and contains several input fields: "First Name" (James), "Last Name" (Smith), "Date of Birth" (2/29/2004), "Date of Visit" (4/12/2006), "Patient ID#" (23000012), and "Report Type" (Admission). Below these fields are "Update" and "Cancel" buttons. At the bottom of the dialog, a status bar shows the URL "http://secure.webchartmd.com/WCMD_Test/Portal/Modals/ChangeDemo" and a green checkmark indicating "Trusted sites".

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”.
3. Enter a username and password in the appropriate fields. Once the user has entered a username and password press the “login” button.

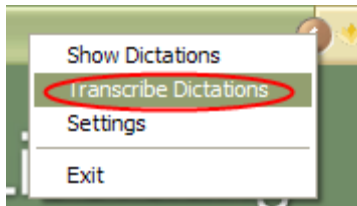


The screenshot shows a desktop application window titled "WebChartMD". The window features a logo consisting of a stylized yellow flower above the text "WebChartMD". Below the logo are two input fields: "Username" (containing "sdouglas") and "Password" (containing "*****"). A green "Login" button is positioned at the bottom right of the form.

WebChartMD

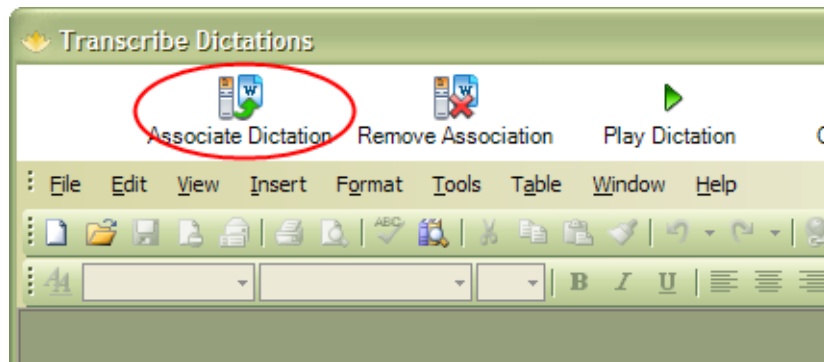
- Transcribing a document using WebChartMD

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



a. Associating a Dictation

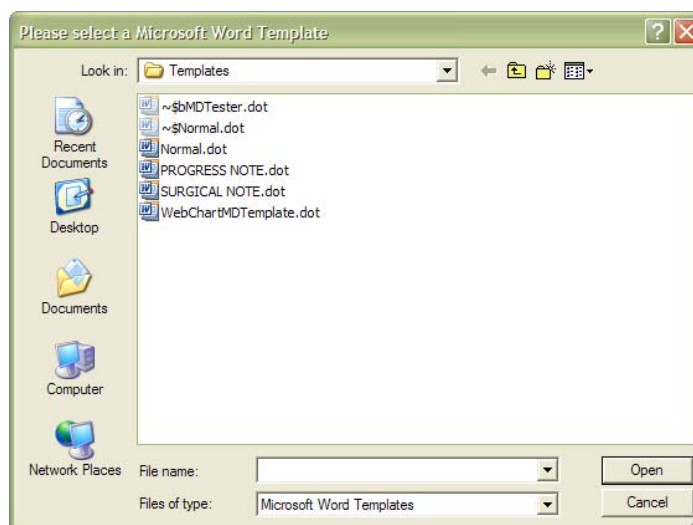
A word document can be associated to a dictation by clicking “Associate Dictation” button in the menu or by pressing ctrl+alt+a.



WebChartMD

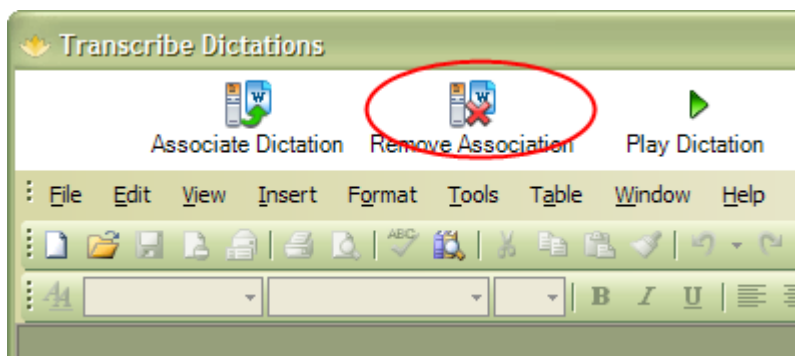
To associate a dictation:

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.



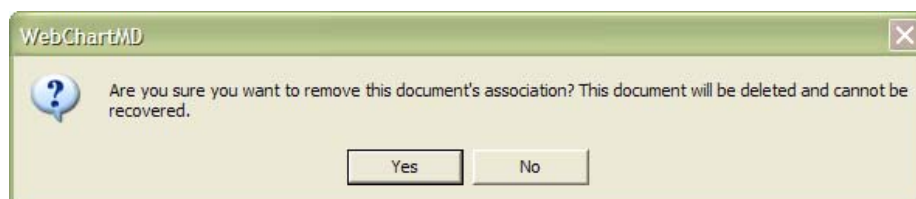
b. Removing an Association

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



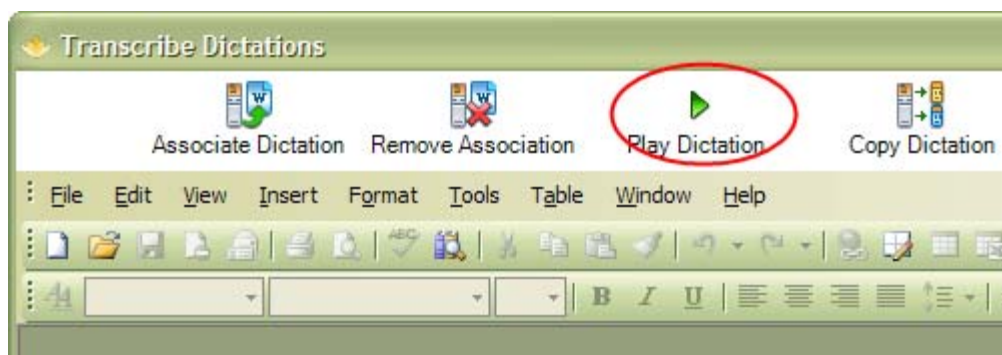
WebChartMD

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.

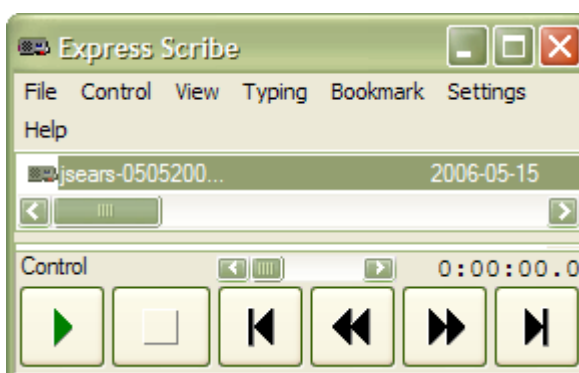


c. Playing a Dictation

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

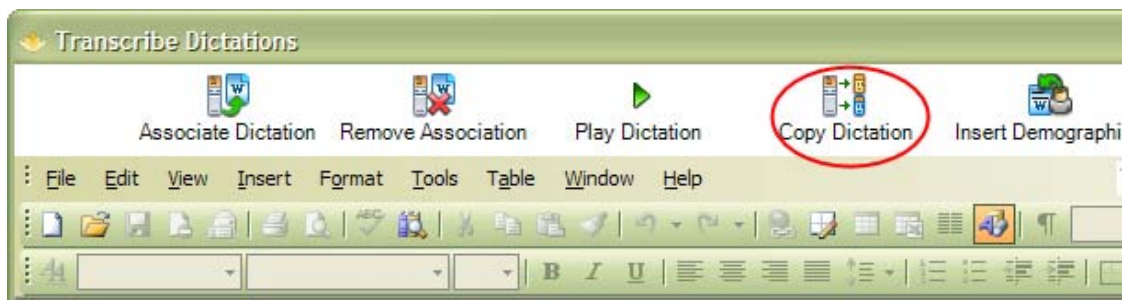


When “Play Dictation” is clicked or ctrl+alt+p is pressed the audio player will be launched and all the normal tasks can be performed on the audio file such as play, rewind, fast forward, etc.

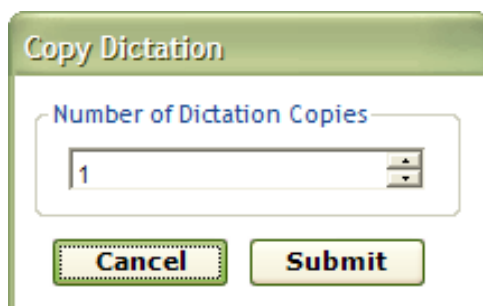


d. Copying a Dictation

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

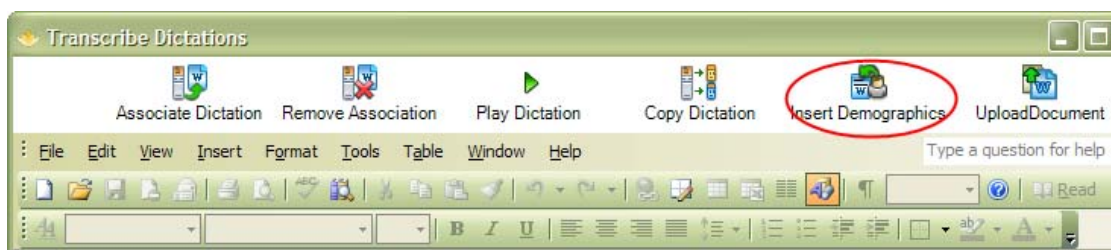


When a dictation is copied a small dialog box will prompt the user to enter the number of dictation copies the user would like to make. This feature is largely useful when a care provider dictates more than one patient’s information in the same audio file. Once the number of copies has been entered click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



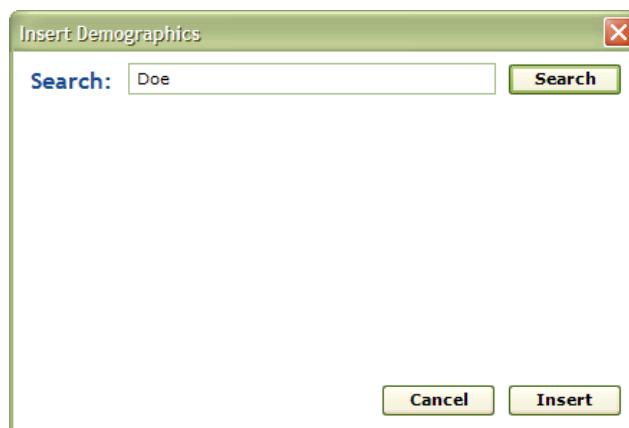
e. Inserting patient demographics

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



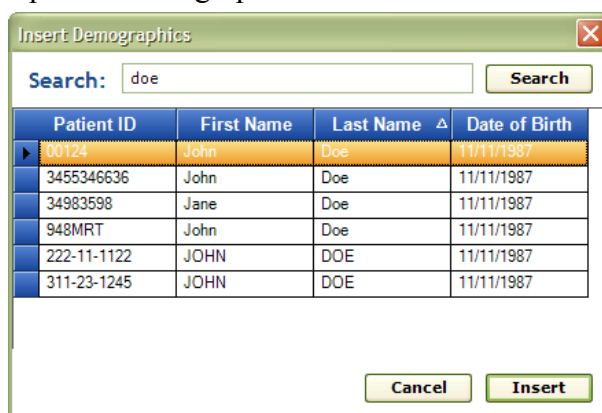
WebChartMD

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.



The "Insert Demographics" dialog box features a search field with the text "Doe" and a "Search" button. At the bottom, there are "Cancel" and "Insert" buttons.

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.



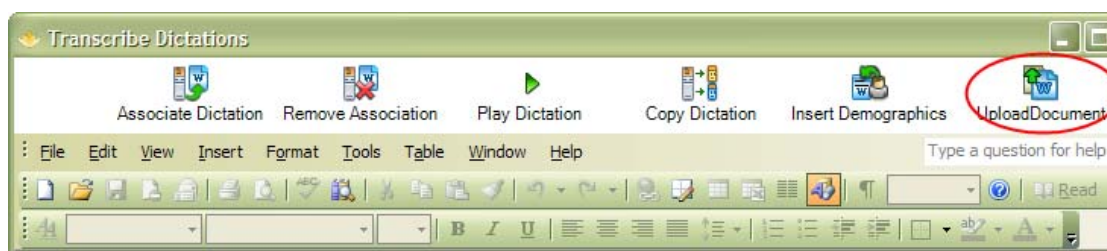
The "Insert Demographics" dialog box shows search results for "doe". It contains a table with the following data:

Patient ID	First Name	Last Name	Date of Birth
00124	John	Doe	11/11/1987
3455346636	John	Doe	11/11/1987
34983598	Jane	Doe	11/11/1987
948MRT	John	Doe	11/11/1987
222-11-1122	JOHN	DOE	11/11/1987
311-23-1245	JOHN	DOE	11/11/1987

Below the table are "Cancel" and "Insert" buttons.

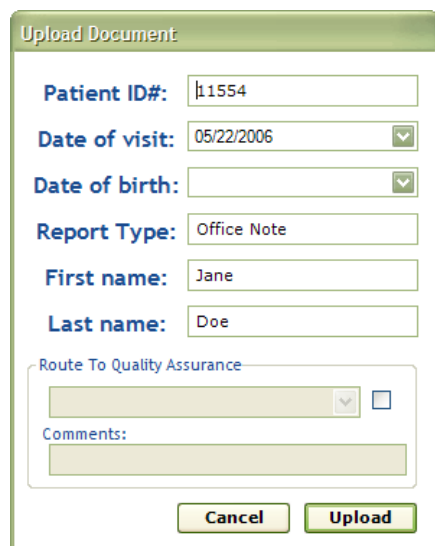
f. Uploading Documents

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



WebChartMD

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.

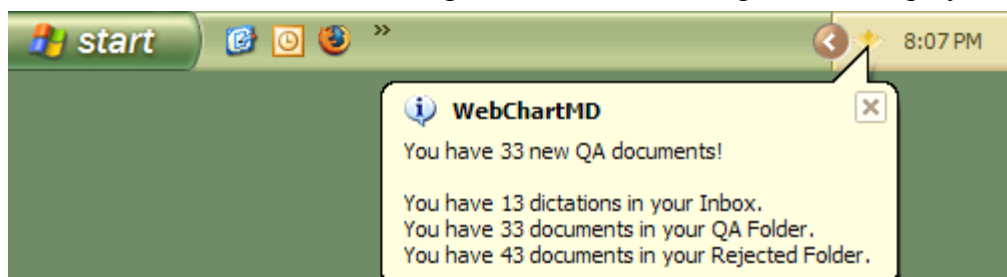


The 'Upload Document' dialog box contains the following fields and controls:

- Patient ID#:** Text input field with the value '11554'.
- Date of visit:** Date picker showing '05/22/2006'.
- Date of birth:** Date picker.
- Report Type:** Text input field with the value 'Office Note'.
- First name:** Text input field with the value 'Jane'.
- Last name:** Text input field with the value 'Doe'.
- Route To Quality Assurance:** A dropdown menu and a checkbox.
- Comments:** A text area for additional notes.
- Buttons:** 'Cancel' and 'Upload' buttons at the bottom.

- 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



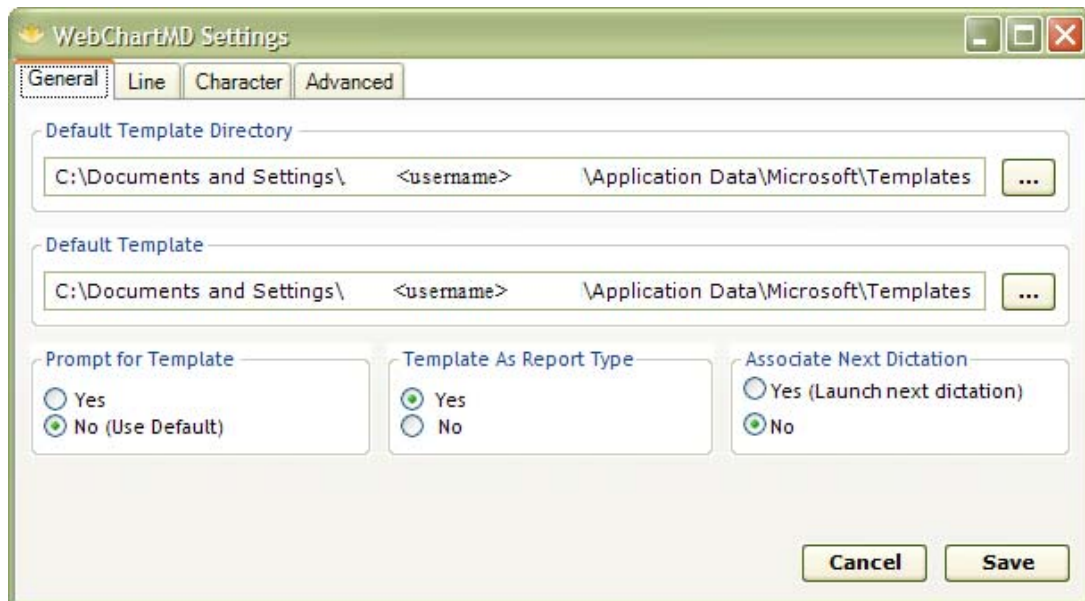
a. Changing the default template directory, the default template and other template settings

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”.



WebChartMD

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.