Nuance®
eScription One
InQuiry

User Guide

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Introduction

InQuiry is a highly customizable HIPAA-compliant web-based application with various features that allows health care providers to review, edit, search, and electronically authenticate transcribed dictations. InQuiry integrates a patient demographic database, referring physician information, and the facility's Electronic Medical Records system. This allows health care providers to quickly and easily complete a quality document. Using InQuiry can help produce a document that is more reliable and consistent than one produced with traditional transcription services.

Requirements

For optimal compatibility, your system must meet the following software and hardware requirements:

Minimum Requirements:

– RAM: 1 GB

– Hard Drive Free Space: 1 GB

– Internet Explorer 9 or higher

– A monitor capable of displaying a resolution of 1024 x 768 pixels

– Internet Connection: High Speed Cable or DSL

Recommended Requirements:

– Windows 10

– RAM: 2 GB or higher

– Hard Drive Free Space: 2 GB or more

– Sound Card with Speakers (or Stereo Headphones)

– Internet Explorer 11

– A monitor capable of displaying a resolution of 1024x768 pixels or higher

– Internet Connection: High Speed Cable or DSL

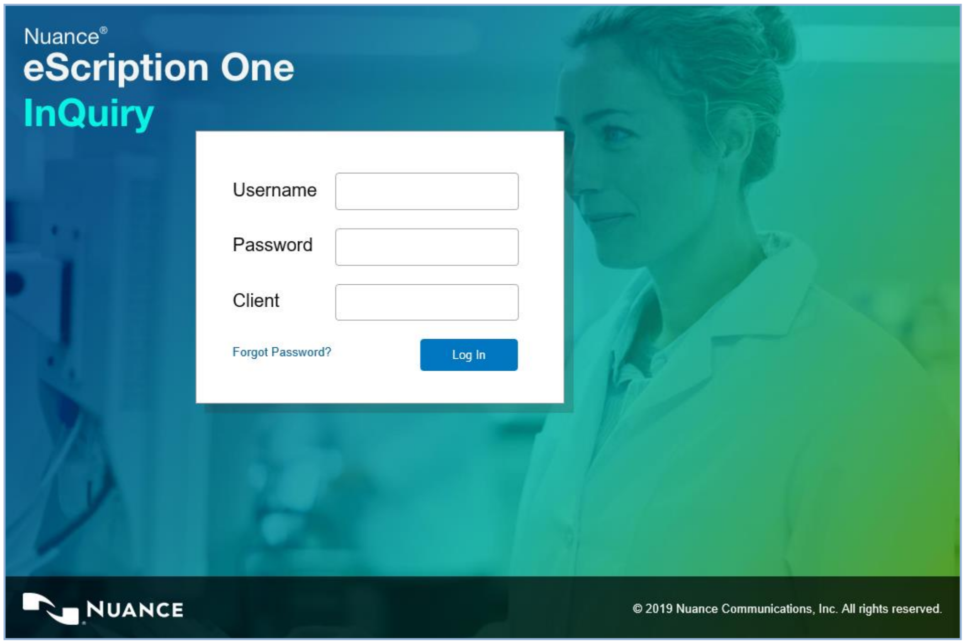
Note: InQuiry is also available in any Java Script capable web browser for any operating system. Please note that some features or capabilities might be changed or missing in a non-IE browser.

Starting InQuiry

Note: Obtain a username, password and client code from your company's system administrator prior to logging into InQuiry.

Log into InQuiry at https://www.escription-one.com/inquiry

Log into InQuiry with the User, Password, and Client information provided by the Transcription Company or System administrators. All three fields are required to access the InQuiry website. eScription One recommends that users keep login information confidential and not share login information with other users.

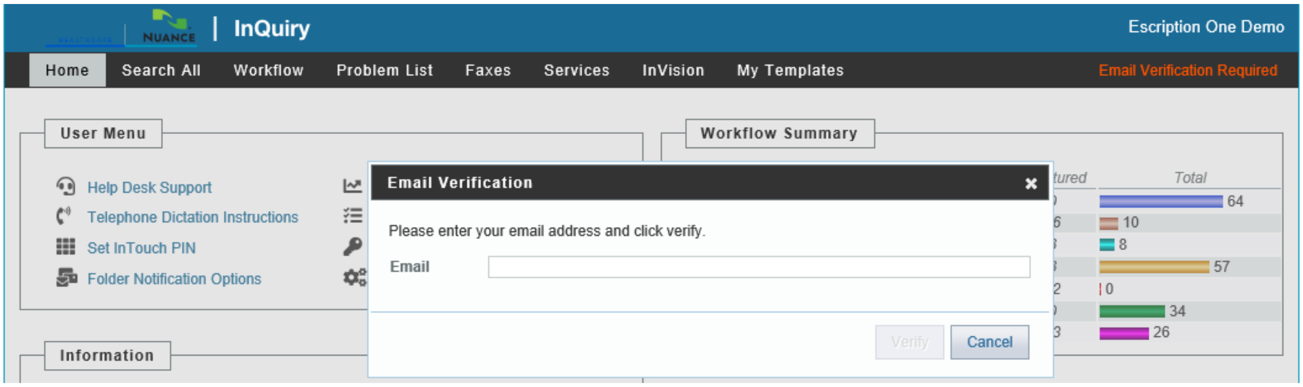


Note the "Forgot Password" link next to the Login button. Clicking this link allows users who have saved a valid email address to receive password reset instructions by email if it is lost or forgotten.

Once successfully logged in, InQuiry displays the user's Home tab. The navigation tabs appear at the top of the InQuiry website. These tabs are persistent throughout the InQuiry application and allow users to quickly navigate to the most commonly accessed destinations. Each navigation tab is explored individually as each has a unique function in the overall application. Not all Navigation tabs are available to all users.

Email Verification

Upon login, if the user has not already entered and validated an email address, a notification window will appear asking for an email address. This email address is used for the reset password process.



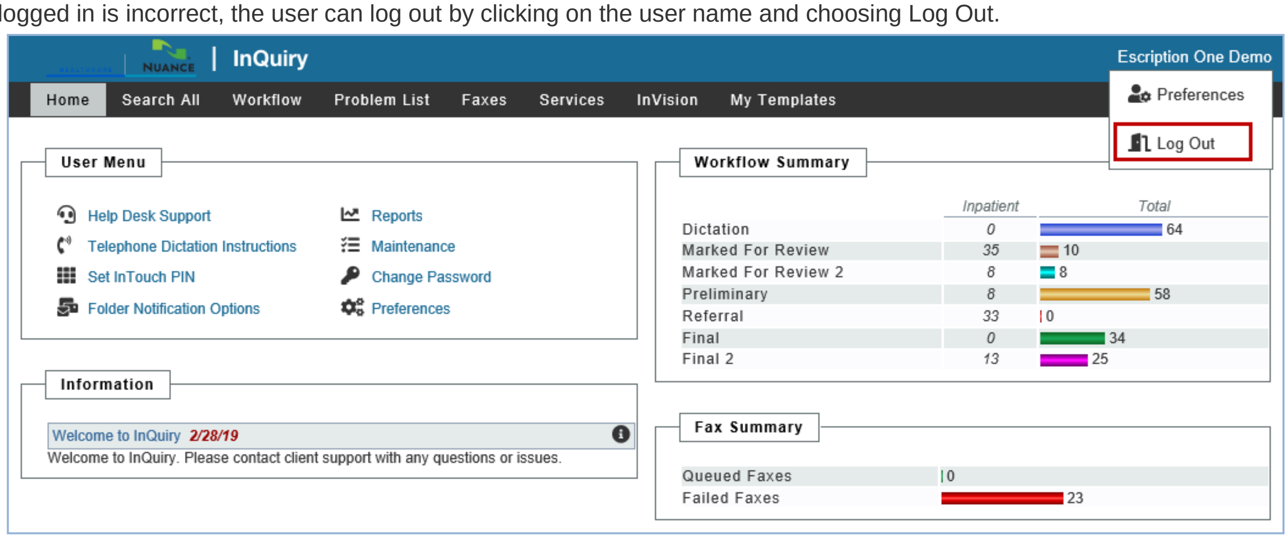
The email address is not required, and the email verification window can be closed by pressing the Cancel button. However, the user will continue to be prompted for their email address at each subsequent login and return to the InQuiry home tab.

The user can type an email address in the Email Verification window and press the Verify button. This will send a verification email to that email address containing a link. When the link is clicked the email address will be verified and the user will no longer be prompted to enter and verify an email address. If the user saves an email address but does not verify it by clicking the link the verification email, they will continue to see a red “Email Verification Required” message in the upper right corner of InQuiry. This red message can be clicked to open the Email Verification window. The red message will be removed after an email address has been verified.

If an email address needs to be edited the user can click on Preferences from the Home tab and edit or enter an email address in the Password Reset Email field. The verification process will need to be repeated.

Home Tab

The Home tab allows users to perform various administrative tasks, set up various preferences, and see a general summary and graph of the workflow. Note the user who is currently logged in is greeted at the top of the page. If the User ID currently logged in is incorrect, the user can log out by clicking on the user name and choosing Log Out.

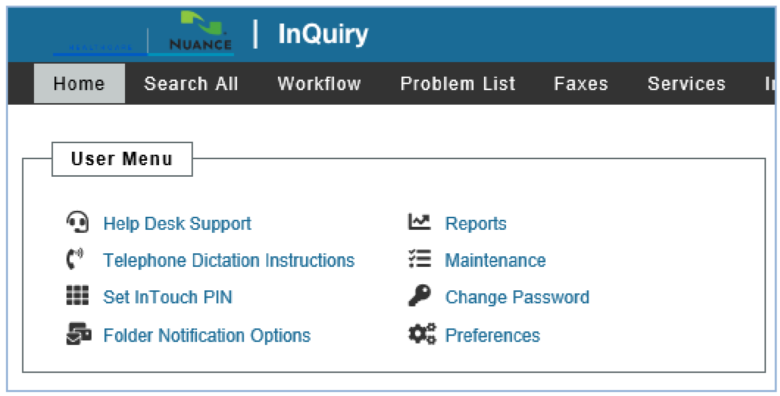


Information

The Information section contains messages and important news from the transcription company, if available.

User Menu

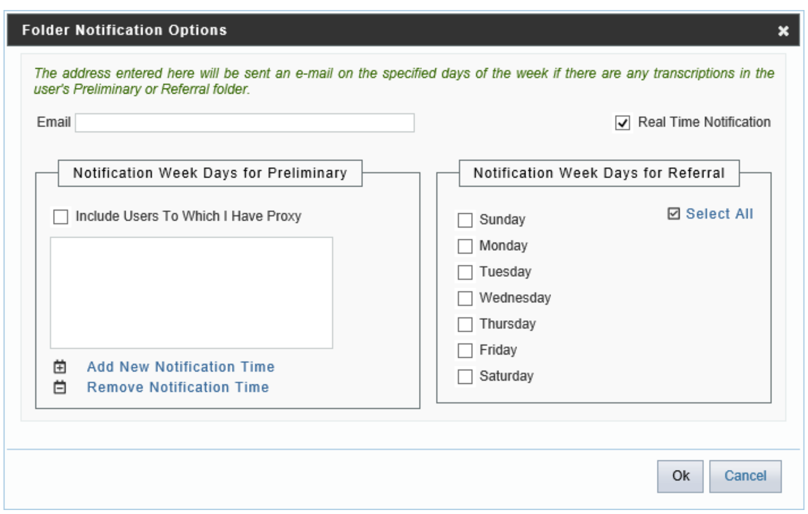
The links under the User Menu section allow access to preferences, maintenance functions, and information customized for the user and client. Not all links in the User Menu are available to all users.



Help Desk Support: This link provides contact information for the transcription company that manages the Client account. If contact information has not been provided, this link directs the user to the eScription One helpdesk number and support websites.

Telephone Dictation Instructions: This link provides detailed information to dictating users who are using the InTouch Telephone dictation service to record dictations. This link is not available to non-dictating users or users at hospitals and clinics who are not using the InTouch telephone dictation system.

Set InTouch PIN: This option allows the dictating user to set or change an InTouch PIN to access the dictation review function of InTouch telephone dictation. This option will only appear if the client has an InTouch emulation that support dictation review.



Folder Notification Options: This allows InQuiry users to receive email notifications about dictations in the workflow. Notifications inform the recipient of the number of dictations that are awaiting review in the Preliminary folder and Referral folder. Real Time Notification updates the Provider via email in real time as transcriptions become available in the Preliminary folder. Otherwise, providers can choose which days and at what times to receive email notifications for the Preliminary folder. Notifications for the Referral folder are always sent at 7 AM in the client's time zone and are generated for the days that are selected. Note: The names of workflow folders are customizable by the client.

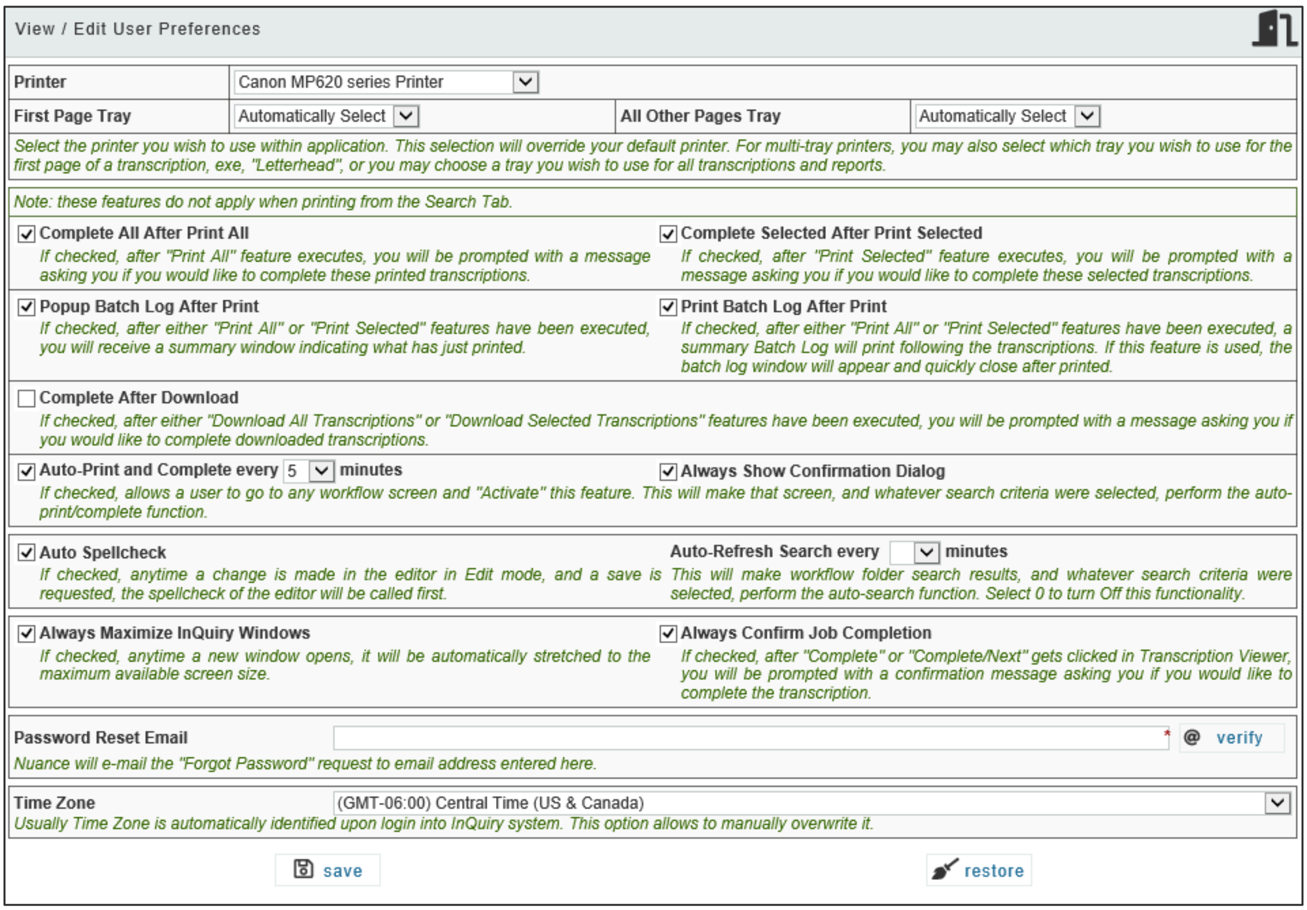
Reports: This is an additional link to the InVision navigation tab.

Maintenance: This is a link to the maintenance section of the client. Access to this link allows users to modify client setup, Associates, Patients, Documents, Users, Templates, ShadowPrint options and other advanced features. Access to this link does not necessarily confer access to all these features and is typically reserved for system administrators and advanced users.

– **Change Password:** This link allows a user to change their password.

Preferences: This link allows the user to modify the way InQuiry prints and behaves while the user performs various functions in the application. Due to the nature of these settings, they are saved to the local machine and not to the user login. This means that users can have different Preferences selected when using different computers. Using the “Ok” button saves setting changes and closes the window. Using the “Restore” button sets all options to default settings.

Note: A separate Printing Component is required for printing functionality. If the component is not installed the user will receive a pop-up notification when the Preferences window is opened, indicating the components were not detected and will contain a link to download and install the components.



Printer: This is the printer that InQuiry defaults to when printing transcriptions. Unless otherwise specified, this setting defaults to the Computer's default printer.

First Page Tray: For printers with multiple trays, this setting determines which tray the paper for Page 1 comes from. This is helpful for clients who are using custom paper letterheads when printing documents. The default setting is "Auto Select."

All Other Pages Tray: For printers with multiple trays, this setting determines which tray the paper for Page 2 and all subsequent pages comes from. The default setting is "Auto Select."

Complete All after Print All: When checked, documents printed using the "Print All" button are also completed from that folder. The default setting is unchecked.

Complete Selected after Print Selected: When checked, documents printed using the "Print Selected" button are also completed from that folder. The default setting is unchecked.

Popup Batch Log after Print: If checked, after either the "Print All" or "Print Selected" function has been executed, InQuiry displays a summary of the transcriptions printed. The default setting is unchecked.

Print Batch Log after Print: If checked, after either the "Print All" or "Print Selected" function has been executed, InQuiry also prints a summary of the transcriptions printed. The default setting is unchecked.

Complete After Download: If checked, after either the "Download All Transcriptions" or "Download Selected Transcriptions" function has been executed, a prompt appears asking the user if those transcriptions should be completed from the current workflow folder.

Auto-Print and Complete every 5 minutes: If checked, allows a user to go to any workflow folder and "Activate" this feature. This will automatically complete and print transcriptions entering the workflow folder at the given search criteria. For this feature to work properly, the InQuiry web page must be left open. The default settings are unchecked and 5 minutes.

Always Show Confirmation Dialog: When using the Print/Complete/Fax All or Selected buttons, the user will be prompted to confirm they want to perform the selected action. Because there is no "undo" button for these actions the default setting is checked on.

Auto Spellcheck: If checked, anytime a transcription is opened in Edit mode and a save action is executed, the spellcheck will automatically run through the transcription text. The default setting is checked on.

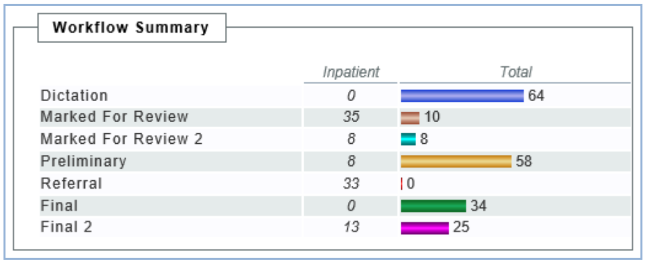
Auto-Refresh Search every x minutes: This option makes the selected workflow and whichever criteria are entered, automatically refresh at a specified interval. The default setting is zero (never).

Always Maximize InQuiry Windows: If checked, anytime a new InQuiry window is opened, it will automatically stretch to the maximum available screen size. The default setting is checked on.

Always Confirm Job Completion: If checked, after "Complete" or "Complete/Next" is clicked in the Transcription Viewer, the user is prompted to confirm Transcription Completion.

Workflow Summary

The Workflow Summary provides a graphical representation and numerical count of the documents in various stages of the workflow. Only active folders are displayed in the workflow summary. Active folders the user does not have access to are displayed with disabled gray links and graphic bars. Only Documents the user has access to are counted in the Summary.



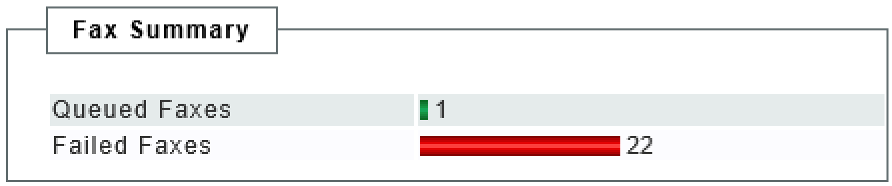
Clicking on the name of a workflow folder in the summary automatically links the user to the Workflow navigation tab and the chosen folder.

Document groups that the user belongs to will be summarized as well, displaying the name of the group and the number of transcriptions in that group for each folder. In the example above, this user is a member of the Inpatient document group.

It is possible to count individual document types or groups of document types separately in addition to displaying a total if the hospital or clinic utilizes the document groups feature.

Note: The labels of workflow folders are customizable for the client.

Fax Summary



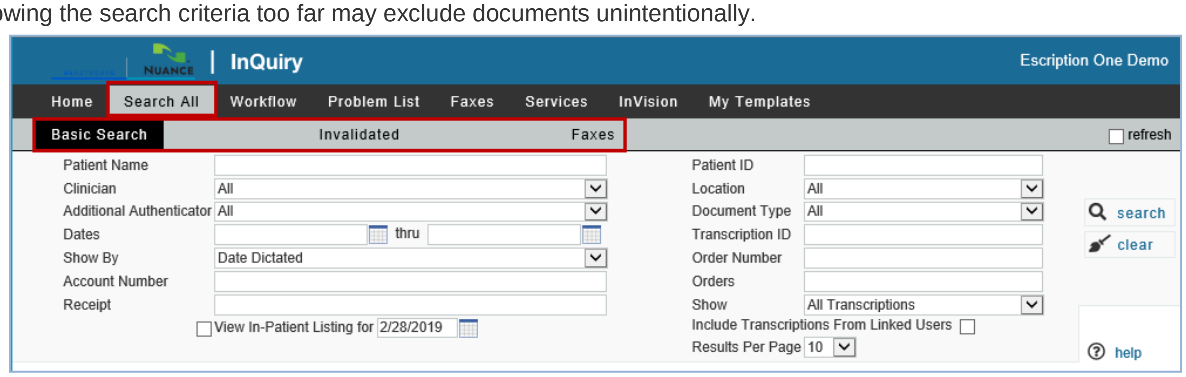
If the user has access rights to Facsimiles, they will also see a Fax Summary on the Home tab. This summary gives the number of queued and failed faxes. Clicking on the Queued Faxes link will open the Faxes tab and run a query for all queued faxes. Clicking on the Failed Faxes link will open the Faxes tab and run a query for all failed faxes.

Search All

The Search All folder allows users to search for transcriptions in the system without knowing specifically where that document is in the workflow. It is also the only way to locate transcriptions that have been completed from all the workflow folders and into the Search All repository. Documents located with the Search All feature can be interacted with normally. Users are not automatically granted access to the Search All folder.

Note: The label of the Search All folder is customizable.

Searches can be generated using some or all of the following criteria. Using fewer criteria may allow a wider range of matching transcriptions, but an insufficiently restricted search can return more transcriptions than are useful. Conversely, narrowing the search criteria too far may exclude documents unintentionally.



There are three sub-tabs in the Search All folder.

Basic Search: Allows the user to search for transcriptions in the Workflow and in the Search All repository.

Invalidated: Allows the user to search for transcriptions that have been removed from the workflow or "deleted." By default, users do not have access to this sub-tab.

Facsimiles: This is a link to the Navigation tab "Facsimiles" By default users do not have access to this sub-tab.

Basic Search

Several search criteria fields are available to help return results that meet your needs.

Patient Name: Search by a patient's last name, first name, or both. Partial name searches are possible. The system will look for exact matches as well as names that contain the value entered in this field. For example, entering a value of "John" locates transcriptions for patients "John Adams" and "Adam Johnson." Note: The label of the patient name field is customizable.

Clinician: Search by Dictating Clinician. The drop-down list contains all users at the client who are dictating users.

Additional Authenticator: Filter for transcriptions that have a specific provider as an additional signature. The drop-down list contains all dictating users.

Dates: Date searches can be for Appointment Dates or for Date Dictated. Entering a value in the first field performs a search from the specified date to present. If a value is also entered in the second field, only dictations between the two dates are returned.

Show by:

> **Date Dictated:** Dictation search results will be based on the date dictated and the date range entered. The date dictated is determined by the InTouch server if the dictating clinician uses InTouch telephone dictation service. The timestamp is created when the dictator completes a dictation. If the dictating clinician uses InSync to upload dictations via a hand-held recorder, the timestamp is created by the recorder when the dictation begins. Note: Hand held recorders that have inaccurate date and time values in their configurations will return inaccurate dates of dictation.
>
> **Show by Appt Date:** Selecting this option searches instead by appointment date. This option is helpful if the appointment is known, but the dictator created the dictation at an unknown time.
>
> **Show by Admit Date:** Selecting this option searches by the patient admission date. Note: This option is only available if additional search criteria are enabled for the client.

View In-Patient Listings for: Check this box and provide a date to view Patient appointments for that day.

Receipt: Search by receipt codes given from the InTouch server after completing a dictation, or from the InSync dictation log.

Patient ID: Search by Patient ID or Medical Record Number (MRN). Note: The label of the patient ID field is customizable.

Location: Search by Location. Locations can be selected in the drop-down box. Only one location may be selected.

Document Type: Search by Document Type. Document Types can be selected from the drop-down box. Only one Document Type may be selected.

TID: Search by Transcription Identification Number. The TID number is a unique number assigned to only one transcription in the system.

Order Number: Search by Order or Account number. Note: The label of the Order Number field is customizable.

Orders: Search by inpatient order numbers. Note: This option is only available if additional search criteria are enabled for the client.

Show: Filter the search results to include:

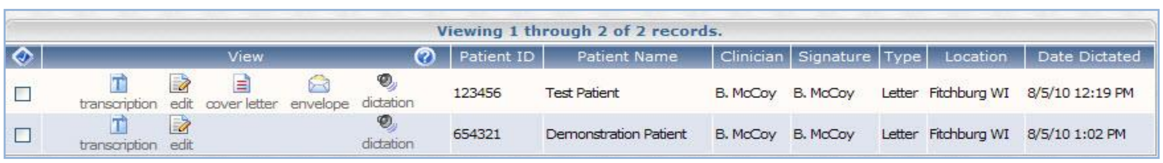
> **All Transcriptions:** Transcriptions that meet the other search criteria with or without additional transcriptions appended.
>
> **Transcriptions with Appends:** Transcriptions that meet the other search criteria and have other transcriptions appended to them.
>
> **Transcriptions without Appends:** Transcriptions that meet other search criteria and do not have other transcriptions appended to them.

Include Transcriptions from Linked Users: If the InQuiry user is linked to any other InQuiry users, transcriptions from those dictators will appear in the search results if they meet the other search criteria.

Results Per Page: Choose the number of search results to display on one page. If more results are returned than allowed on a page, the grid will contain page navigation buttons.

After all search criteria have been selected press Enter or the Search button to submit the search. Press the Clear button to remove all search criteria.

Search All Icons



– **Play Dictation:** Pressing the dictation button downloads and plays the audio file in your browser's default media player.

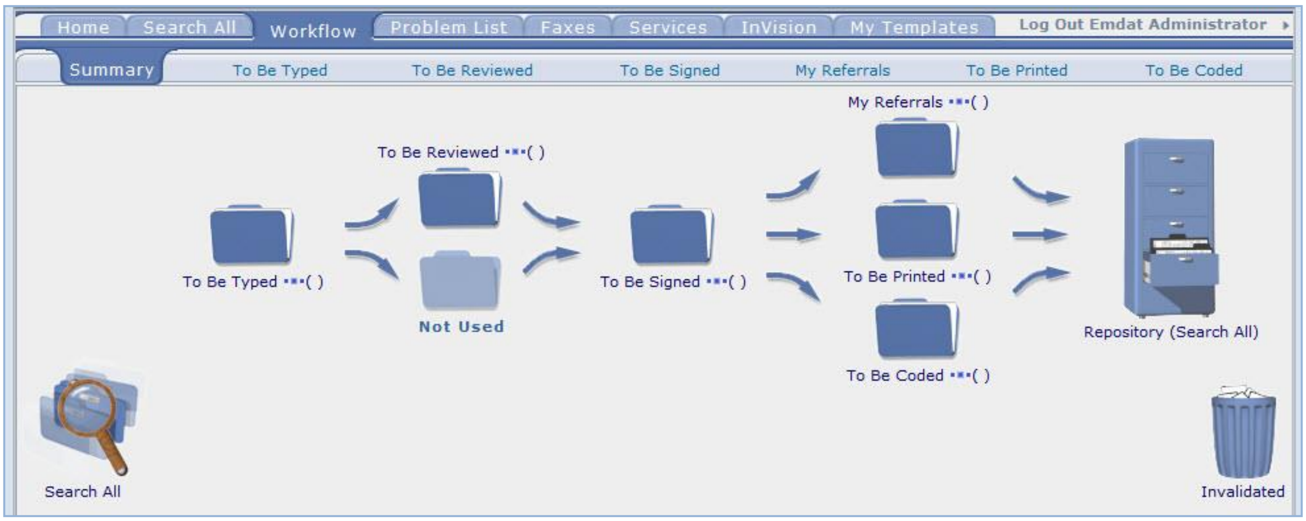
– **Transcription:** Pressing the transcription button opens a preview of the typed document. This button is unavailable for documents that have not been typed. More information about the transcription button is available in Transcription Viewer.

– **Cover Letter:** Pressing the cover letter button opens a preview of the document cover letter. Cover letters are not generated for transcriptions without associates who receive documents by mail. Note: Specific dictators or document types may not generate cover letters.

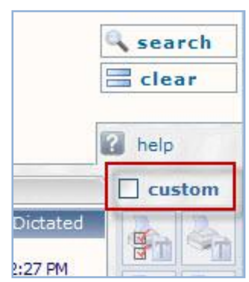
– **Envelope:** Pressing the envelope button opens a preview of the document envelope. Envelopes are not generated for transcriptions without associates who receive documents by mail. Note: Specific dictators or document types may not generate envelopes.

Workflow

The contents of the Workflow tab are highly customizable and can be configured to the specific needs of the client. The Dictation status folder is always active, but all other folders in the workflow may not be in use by the client, or can be made unavailable to specific users. Folders that are not in use are labeled "Not Used." Folders that the user does not have access to are grayed out. Accessible folders are displayed as links, or sub tabs below the standard navigation tabs. The names of the workflow folders can also be renamed, but their function and place in the work flow will remain unchanged.

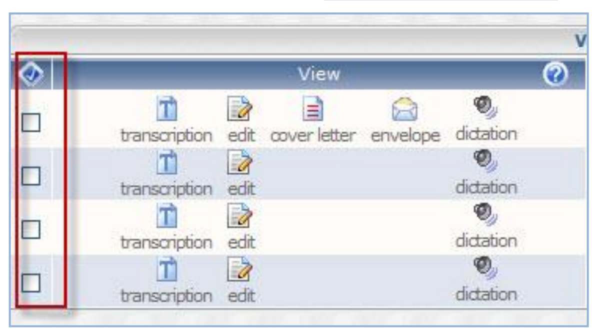


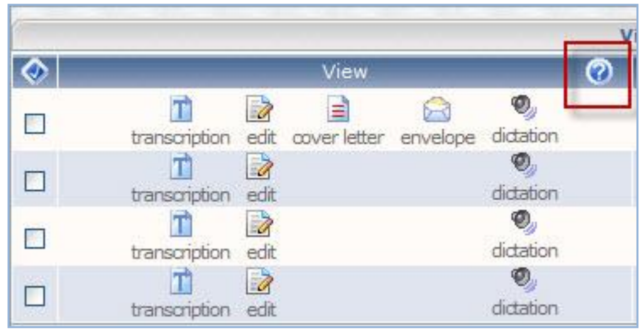
The following Workflow buttons are available in each folder except the Dictation Status Folder.



– **Custom:** The custom check box is used to specify customized print settings for documents that are printed while the check box is active. The user can specify Top, Bottom, Left, and Right margins and line spacing percentage.

– **Transcription Selection Boxes:** The check boxes on the left side of the results window are used in conjunction with the Print Selected, Print Selected Cover Letters, Print Selected Envelopes, Complete Selected, and Fax Selected buttons. Using the Blue Diamond buttons selects all transcriptions in the results window.





– **Show Labels:** This button toggles between displaying the labels for the icons in the results window. Advanced users, or users with limited screen resolutions can toggle off icon labels to conserve screen space.

– **Print Selected/Print All:** Prints the selected transcriptions only without cover letters or envelopes. Selecting the Print All button prints all transcriptions in the results window.

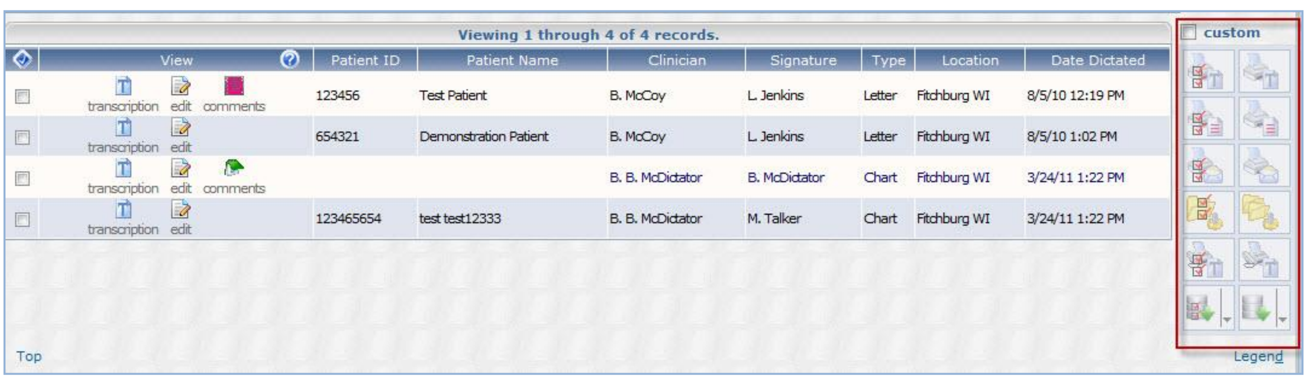
– **Print Selected Cover Letters/Print All Cover Letters:** Prints the selected transcriptions with cover letters. Selecting the Print All Cover Letters button prints all transcriptions in the results window with cover letters.

– **Print Selected Envelopes/Print All Envelopes:** Prints the selected transcriptions with envelopes and cover letters. Selecting the Print All Envelopes button prints all transcription envelopes in the results window with envelopes.

– **Complete Selected/Print All:** Completes the selected files from the folder moving them to the next stage in the workflow. Selecting the Complete All button completes all transcriptions in the results window.

– **Fax Selected/Fax All:** Faxes the selected transcriptions to a specified associate. Selecting the Fax All button faxes all transcriptions in the results window to one associate.

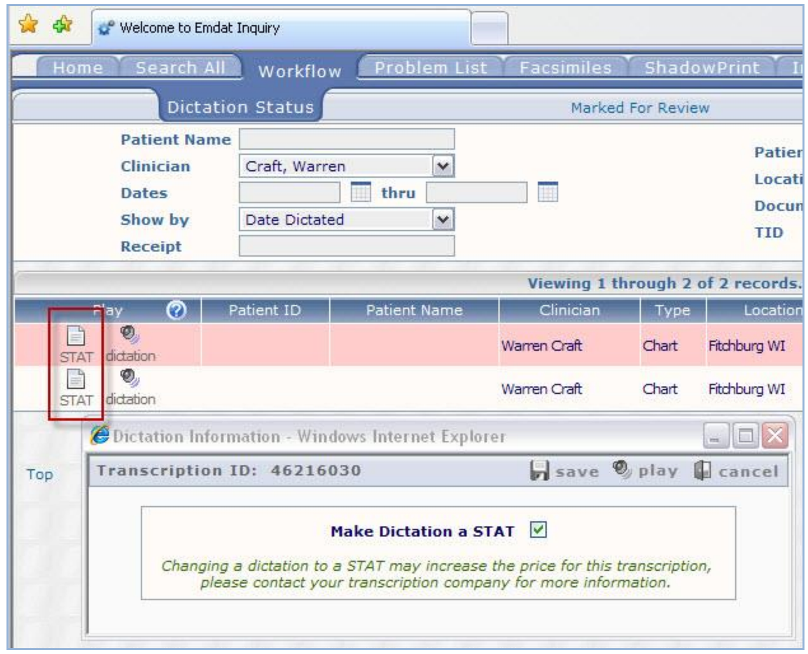
– **Legend:** Displays definitions for color coded transcriptions.



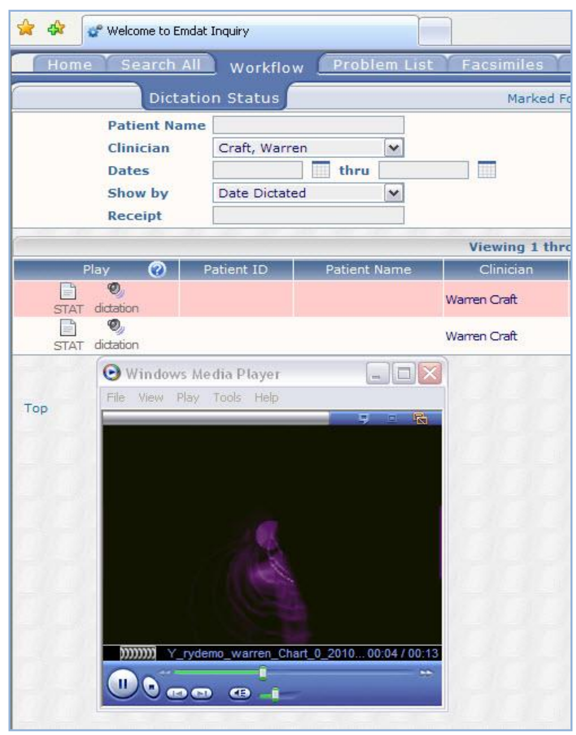
Dictation Status

Transcriptions in the Dictation Status folder have recently been uploaded to the transcription company and have not been delivered as completed documents. A search of transcriptions in Dictation Status can be made using most of the fields described in Section 4: Search All. Two actions can be performed on Dictations that are in the Dictation Status workflow folder.

– **Mark a Transcription STAT:** A Transcription can be marked as a higher priority STAT dictation. Transcriptions marked STAT are completed before other transcriptions and may have a higher cost per line. Transcriptions that appear in pink have been marked STAT. Note: The color of STAT dictations is customizable.

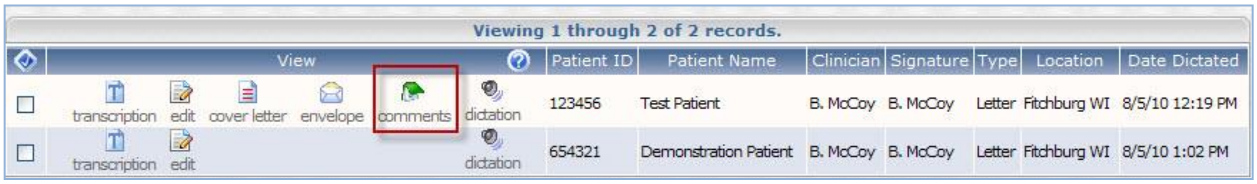


– **Play Dictation:** Pressing the dictation button downloads and plays the audio file in your browser's default media player.

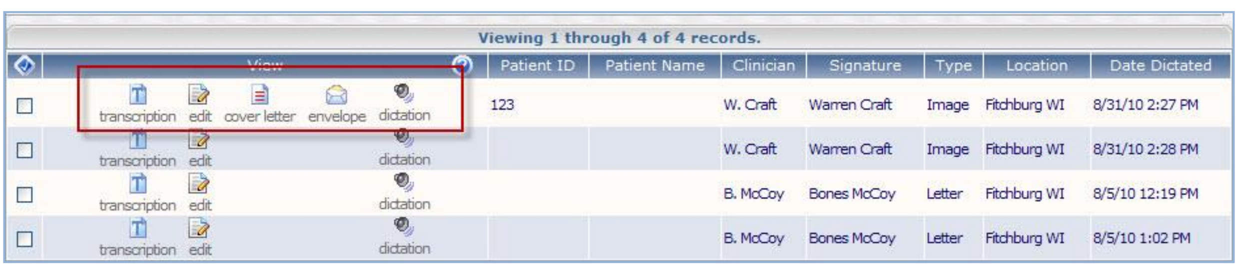


Marked for Review

Transcriptions in the Marked for Review and Marked for Review 2 folders have been typed by the transcription company. Transcriptions in the Review folders have been completed, but may require additional edits from Staff members. A search of transcriptions in Marked for Review can be made using most of the fields described in Section 4: Search All. Transcriptions in the Marked for Review folders print with a "Preliminary" watermark by default. Documents in the Review folder commonly have comments from the Transcription Company detailing why the document was selected for the Marked for Review folder.



- **Play Dictation:** Pressing the dictation button downloads and plays the audio file in the browser's default media player.
- **Transcription:** Pressing the transcription button opens a preview of the typed document. More information about the transcription button is available in Transcription Viewer.
- **Edit:** Pressing the edit button opens the editing screen for the transcription. More information about the edit button is available in Transcription Editor.
- **Cover Letter:** Pressing the cover letter button opens a preview of the document cover letter. Cover letters are not generated for transcriptions without associates who receive documents by mail or fax. Note: Specific dictators or document types may not generate cover letters.
- **Envelope:** Pressing the envelop button opens a preview of the document envelope. Envelopes are not generated for transcriptions without associates who receive documents by mail or fax. Note: Specific dictators or document types may not generate envelopes.



Preliminary

Transcriptions in the Preliminary folder have been typed by the transcription company and are now ready for provider review. If the Provider is using the electronic signature option, completing individual documents from the Preliminary folder using the Transcription viewer is the action that applies the electronic signature to the document. The preliminary folder is the last folder in the workflow that users are allowed to edit transcriptions. Transcriptions in the Preliminary folder print with a "Preliminary" watermark by default.

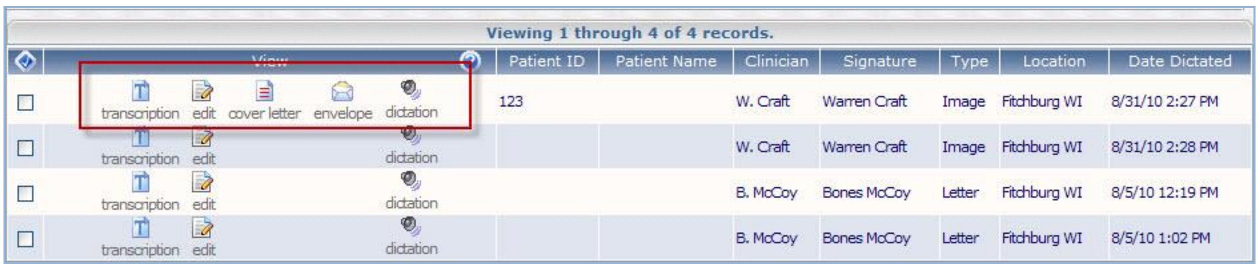
- **Play Dictation:** Pressing the dictation button downloads and plays the audio file in the browser's default media player.

– **Transcription:** Pressing the transcription button opens a preview of the typed document. More information about the transcription button is available in Transcription Viewer.

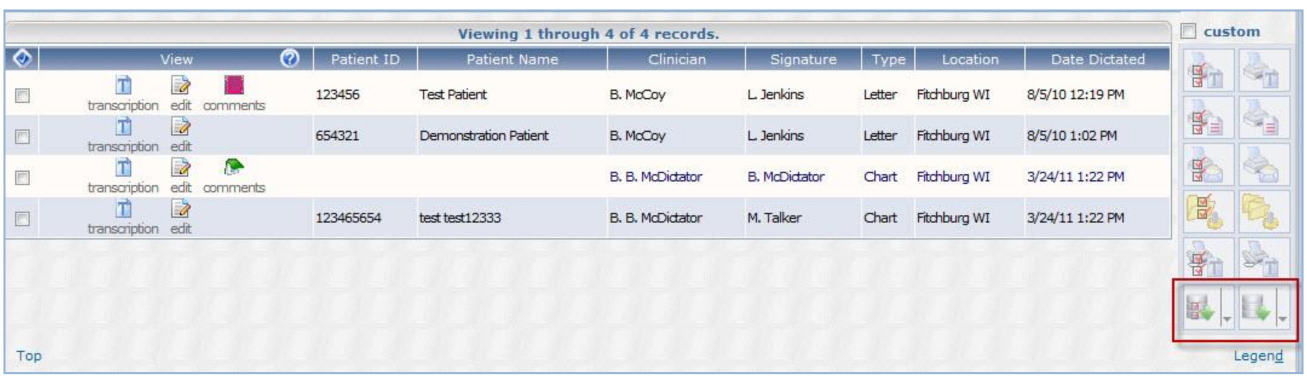
– **Edit:** Pressing the edit button opens the editing screen for the transcription. More information about the edit button is available in Transcription Editor.

– **Cover Letter:** Pressing the cover letter button opens a preview of the document cover letter. Cover letters are not generated for transcriptions without associates who receive documents by mail or fax. Note: Specific dictators or document types may not generate cover letters.

– **Envelope:** Pressing the envelop button opens a preview of the document envelope. Envelopes are not generated for transcriptions without associates who receive documents by mail. Note: Specific dictators or document types may not generate envelopes.



– **Download All/Download Selected:** In the Preliminary Folder there is a new button in the workflow screen that allows the user to download a PDF or Word copy of the document and save it to the PC.



Final

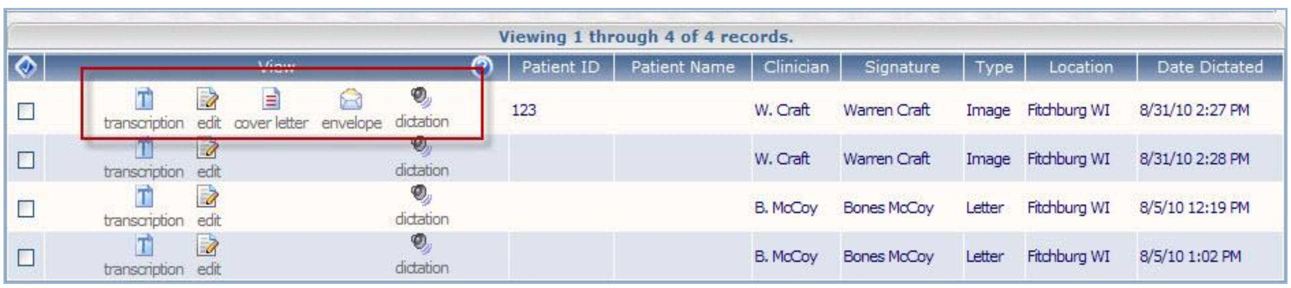
Transcriptions in the Final folders have been typed by the transcription company, and if the electronic signature option is being used, authenticated by the provider. Documents in the Final folder are prepared to print for the chart, paper record, or to send to referring associates who receive their copies by mail. Transcriptions in the Final folders print without a watermark by default.

– **Play Dictation:** Pressing the dictation button downloads and plays the audio file in the browser's default media player.

– **Transcription:** Pressing the transcription button opens a preview of the typed document. More information about the transcription button is available in Transcription Viewer.

– **Cover Letter:** Pressing the cover letter button opens a preview of the document cover letter. Cover letters are not generated for transcriptions without associates who receive documents by mail or fax. Note: Specific dictators or document types may not generate cover letters.

– **Envelope:** Pressing the envelop button opens a preview of the document envelope. Envelopes are not generated for transcriptions without associates who receive documents by mail. Note: Specific dictators or document types may not generate envelopes.



Viewing 1 through 4 of 4 records.

	View	Patient ID	Patient Name	Clinician	Signature	Type	Location	Date Dictated
	transcription edit cover letter envelope dictation	123		W. Craft	Warren Craft	Image	Fitchburg WI	8/31/10 2:27 PM
	transcription edit dictation			W. Craft	Warren Craft	Image	Fitchburg WI	8/31/10 2:28 PM
	transcription edit dictation			B. McCoy	Bones McCoy	Letter	Fitchburg WI	8/5/10 12:19 PM
	transcription edit dictation			B. McCoy	Bones McCoy	Letter	Fitchburg WI	8/5/10 1:02 PM

Repository (Search All)

The Repository (Search All) folder is the final destination in the workflow. This link opens the Search All navigation tab. For more information see Search All.

Invalidated

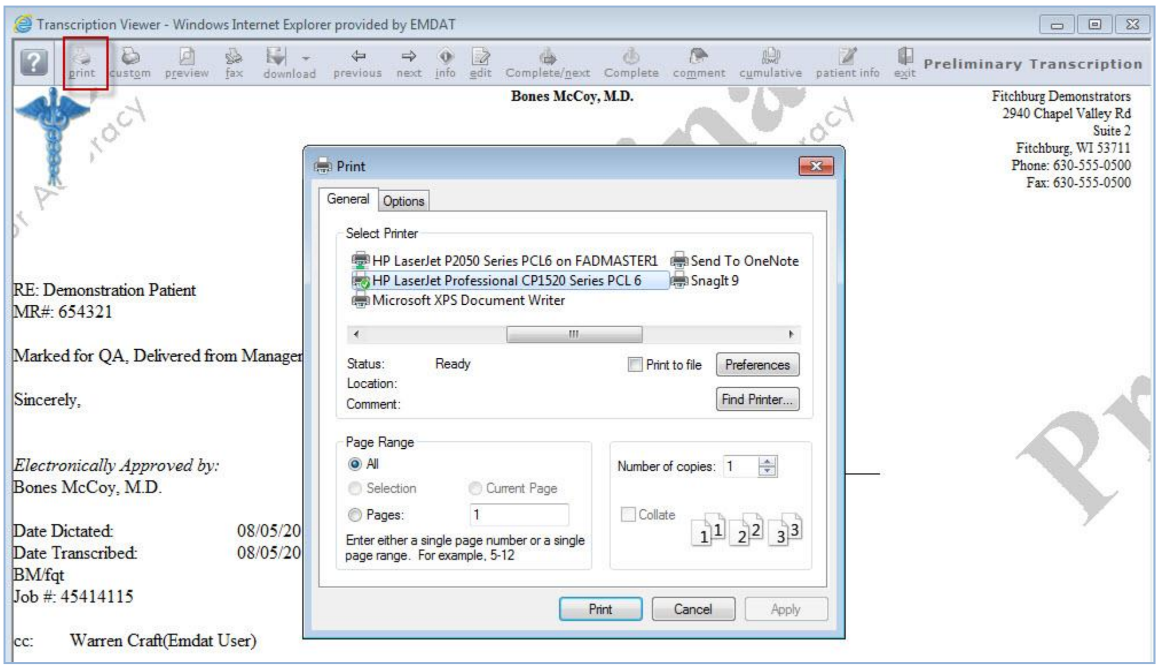
The Invalidated folder is where discarded transcriptions are kept in case they need to be retrieved or restored to the workflow. This link opens the Search All navigation tab in the invalidated sub tab. By default Users do not have access to the Invalidated sub tab. For more information see Search All.

Transcription Viewer

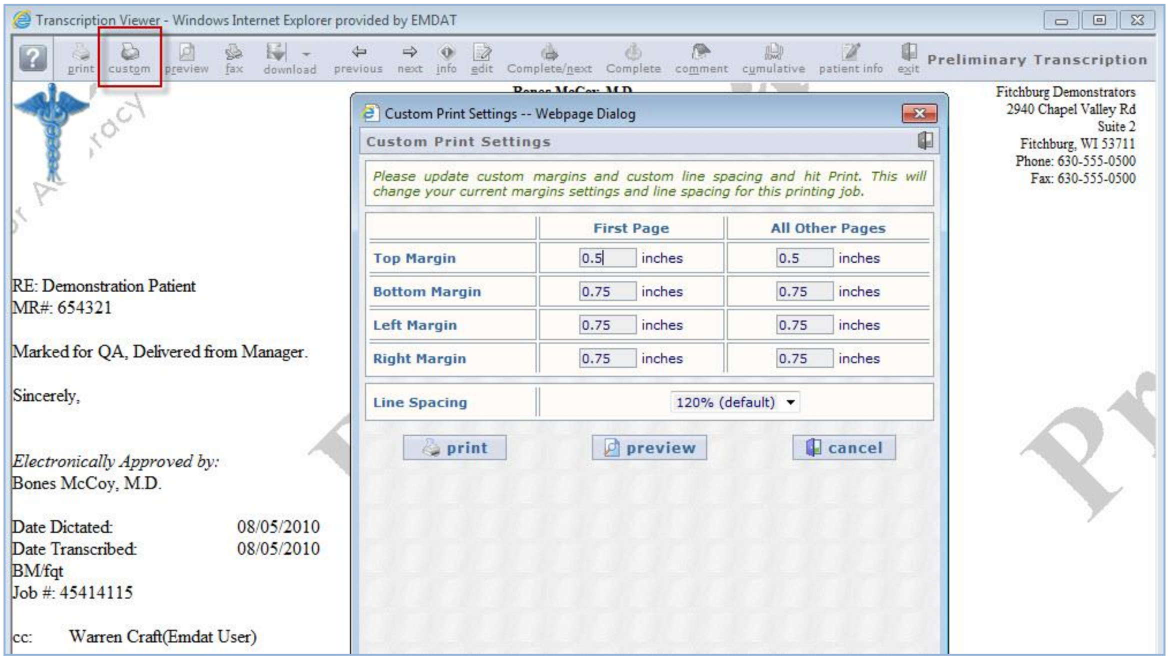
The Transcription Viewer is a preview of the typed document. In addition to providing a large preview of the document, at the top of the Transcription Viewer are several function buttons. The question mark button in the upper left corner toggles hiding and showing the function button labels. In the far right, the Workflow folder the transcription is currently in is displayed.

Print: This button opens Internet Explorer's Print Dialog.

Note: eScription One printing components are required to print transcriptions. If the components have not yet been installed a popup will appear with a link to download and install the components.

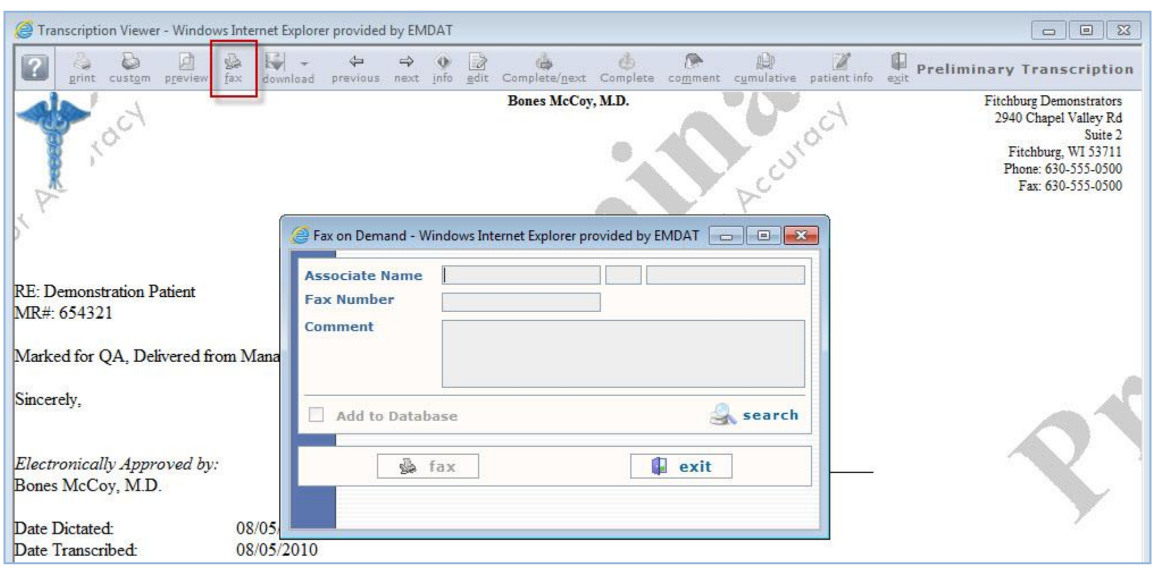


– **Custom:** The custom button allows a user to specify customized print settings for the document. The user is allowed to specify Top, Bottom, Left, and Right margins and line spacing percentage.

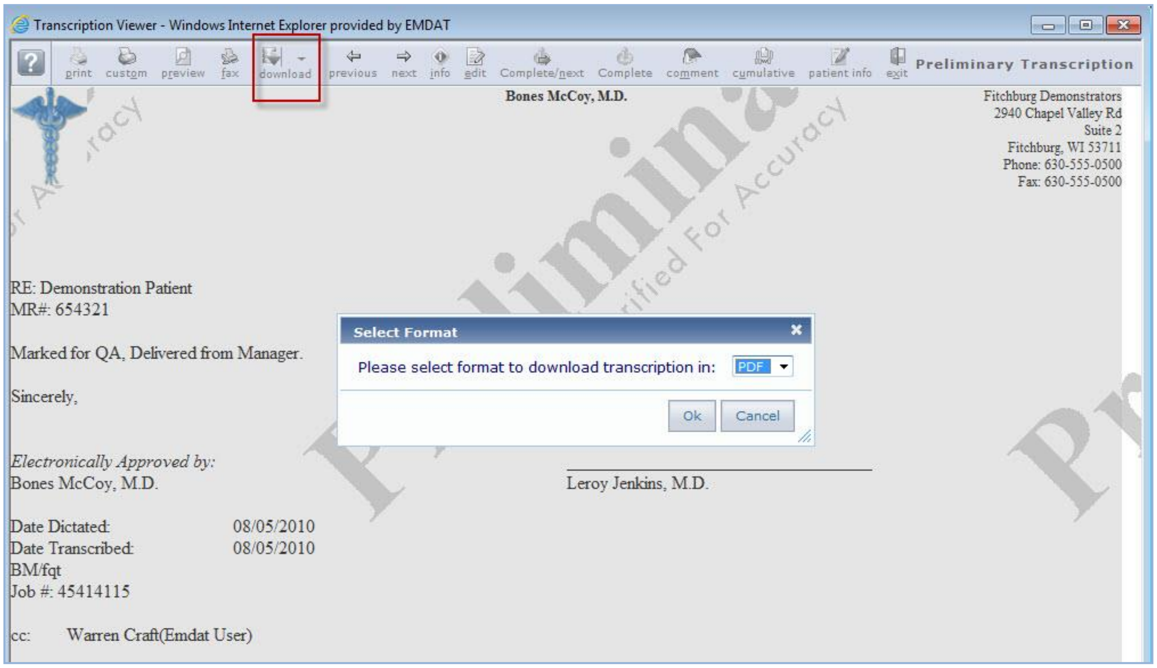


– **Print Preview:** The Print Preview button opens the print preview screen, displaying how the document will appear on paper after it is printed.

– **Fax:** The fax button opens the Fax on Demand dialog box.



– **Download:** The Download button appears in the Transcription viewer and allows users to save a copy of the Dictation in Word or PDF format to their PC. This button is only available for files in the Preliminary folder when it is enabled.



– **Previous/Next:** The Previous and Next buttons allow users to page through the Transcriptions searched for in the workflow folders.

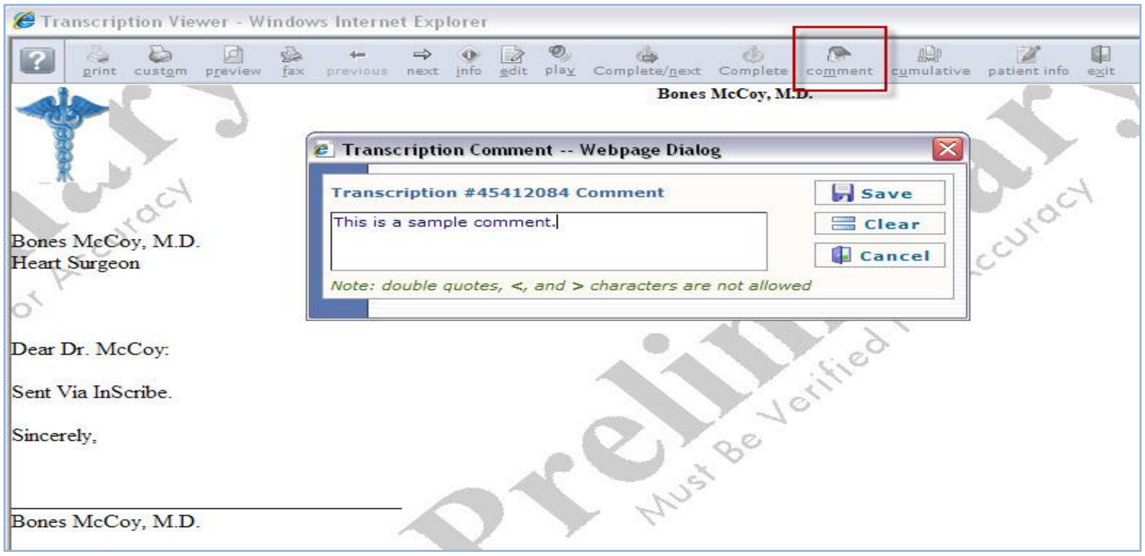
– **Info:** The Info button contains information about the transcription, including demographic information and an activity log. It is also where a transcription can be invalidated by InQuiry users or returned to a previous state in the workflow. The Info button is covered comprehensively in Transcription Info.

– **Edit:** The Edit button shifts the Transcription Viewer into edit mode. The Edit button is covered comprehensively in Transcription Editor.

– **Play Dictation:** Pressing the dictation button downloads and plays the audio file in your browser default media player.

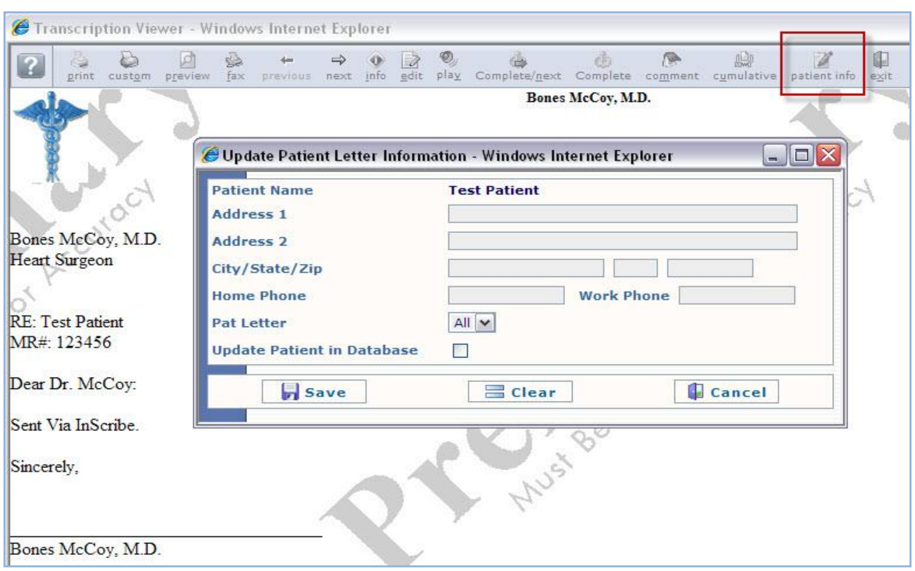
– **Complete/next and complete:** Complete moves transcriptions forward in the workflow. If the document is in the Preliminary folder and is completed by the dictating clinician or additional authenticator, using the complete button also applies the electronic signature if the provider is using that feature. The Complete button completes the transcription selected and closes the window. The Complete/next button completes the transcription selected and opens the next transcription in the Viewer. This is helpful for completing multiple dictations in a row. Note: The names of the Complete/next and Complete buttons are customizable.

– **Comment:** The Comment button allows users to read or leave comments.



– **Cumulative:** The cumulative button combines all transcriptions from the search results into one document. This feature was designed for “Sticky Paper” or “Roll Paper” as a method of conserving the expense. Printing cumulated transcriptions removes the white space between dictations.

– **Patient Info:** This button allows users to edit patient contact information.



– **Exit:** Closes the Transcription Viewer.

Transcription Editor

The Transcription Editor is where users can make adjustments to the demographics of the patient and document. Additionally, the body of the document can be edited to correct mistakes or to make other adjustments. By default, only documents that are in the Marked for Review and Preliminary Folders can be edited.

Function Buttons

The function buttons at the top allow users to modify the document. The question mark button in the upper left corner toggles hiding and showing the function button labels.

– **Save:** This saves any changes made to the document, but allows the user to continue editing without reopening the editor window. If the editor window is closed without saving, any changes will be lost.

– **Add Associate:** The Add Associate button adds an additional section beneath the Editor window where Referred Associates can be searched for, created, and added to the Associate Database. The Associates section is covered comprehensively in Associates.

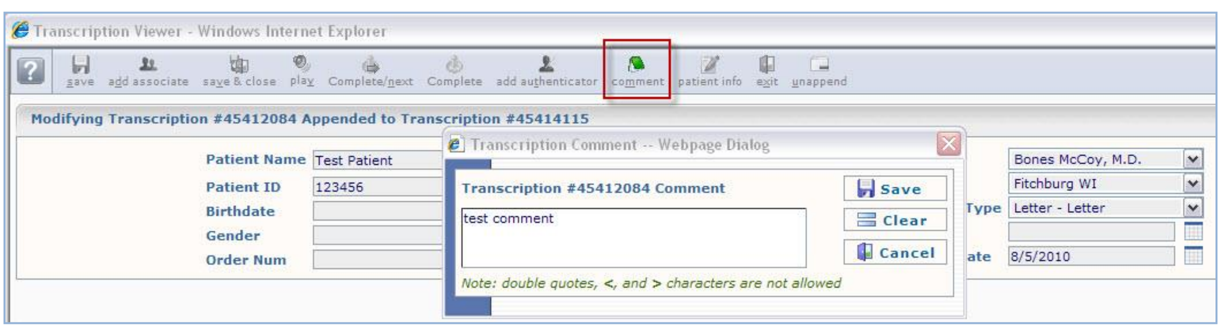
– **Save & Close**: This saves any changes made to the document, but also closes the editor window and returns the user to the Transcription Viewer.

– **Play Dictation:** Pressing the dictation button downloads and plays the audio file in your browser default media player.

– **Complete/next and Complete:** Complete moves transcriptions forward in the workflow. If the document is in the Preliminary folder, and is completed by the dictating clinician or additional authenticator, using the complete button also applies the electronic signature if the provider is using that feature. The Complete button completes the transcription selected and closes the window. The Complete/next button completes the transcription selected and opens the next transcription in the Viewer. This is helpful for completing multiple dictations in a row. Note: The names of the Complete/next and Complete buttons are customizable.

– **Add Authenticator:** This allows the user to add an additional authenticator to the document. Fellows and Resident doctors are frequently required to add an additional authenticator, but this feature can be used any time multiple signatures are required or desired. The Additional Authenticators section appears beneath any Referred Associates. Authenticators are covered comprehensively in Authenticators.

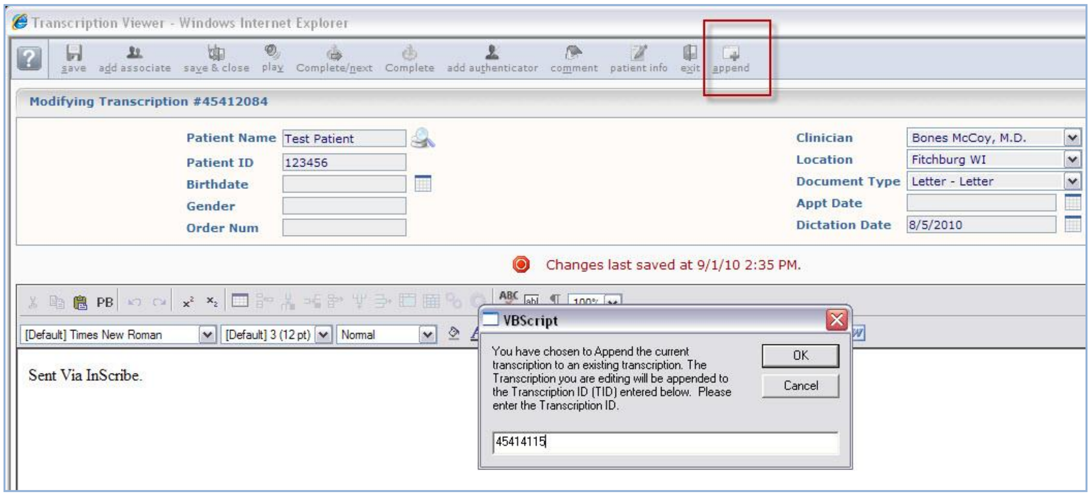
– **Comment:** The Comment button allows users to read or leave comments and update comment tags.



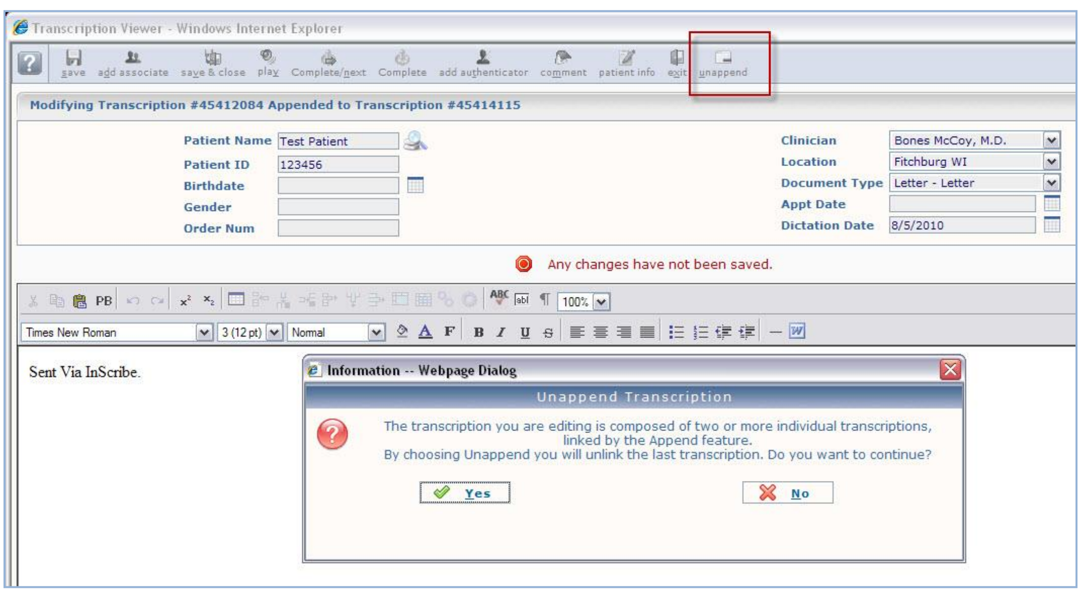
– **Patient Info:** This button allows users to edit patient contact information.

– **Exit:** Closes the Transcription Editor. Any changes will not be saved.

– **Append:** Appends the opened transcription to a specific Transcription ID.



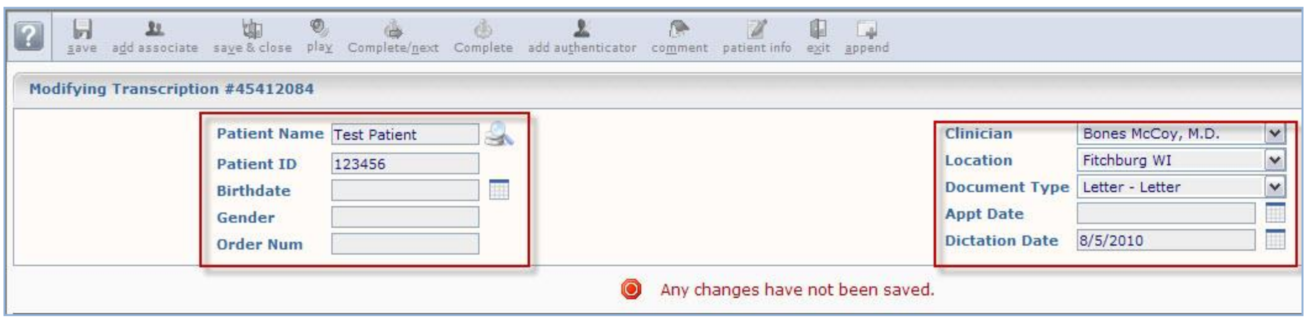
– **Unappend:** Unappending the Transcription removes the link between the selected transcription and the transcription it was appended to.



Demographics

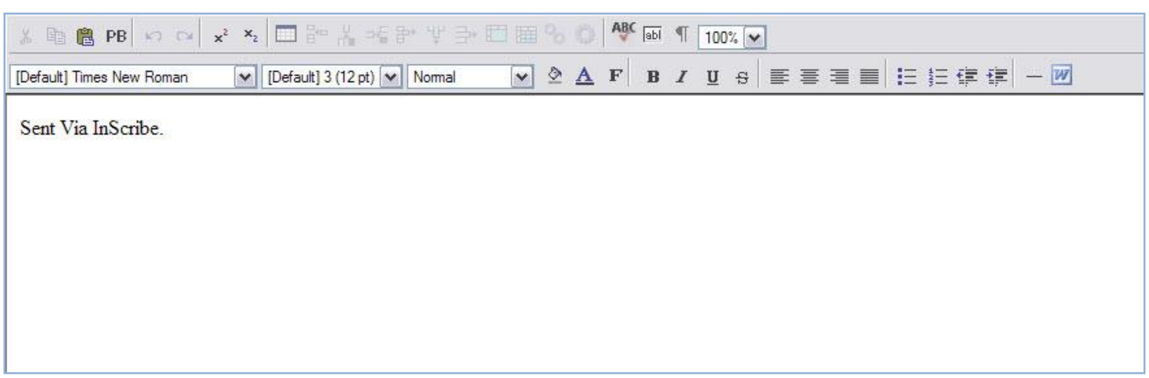
Demographics include patient information, but also include health care provider and appointment information. Additionally, any custom fields requested by the client can be updated in the demographics section. Users can search the Patient Database for patients by using the Magnifying Glass button next to the Patient Name field. Patients can be located in the database by Name or Patient ID or Medical Record Number.

- Patient Information includes Patient Name, Patient ID, and Birth date, Gender, and Order number. Note: The Patient Name, Patient ID, and Order Number fields are customizable.
- **Clinician:** Indicates the healthcare provider who dictated the document.
- **Location:** Indicates where or in what department the patient was seen.
- **Document Type:** Indicates which work type the transcription is formatted as. A letter work can appear very differently from a Chart Note when printed.
- **Appt Date:** The appointment date indicates the date the patient was seen.



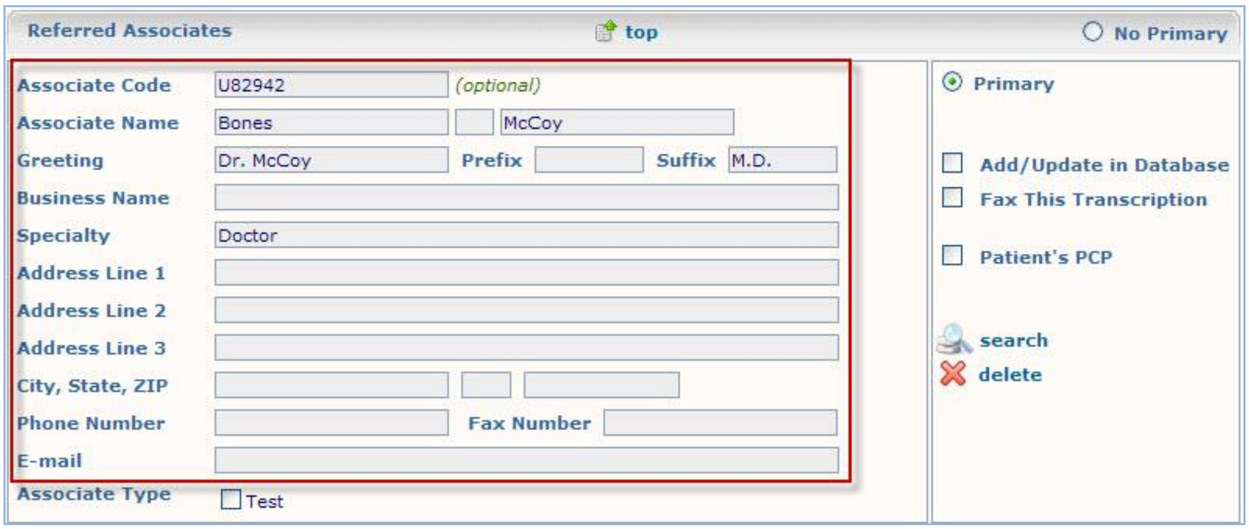
Editor Window

The Editor Window allows the provider to make changes to the body of the document. All of the formatting tools that are available to the Medical Transcriptionist are also available to client staff and healthcare providers. The tools in the tool bar allows users to create and modify tables, change font and size, and add Bulleted or Numbered lists. Additionally, the spell check button is available on the editor toolbar.

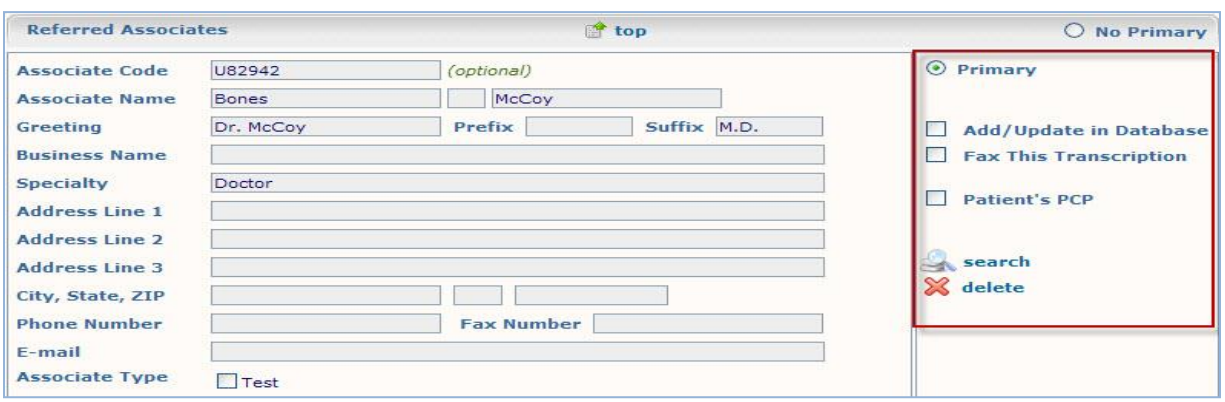


Associates

Referred Associates are people or organizations who received copies of the transcription. After a Referred Associate section has been added using the “Add Associate” button in the Transcription Editor, the Associate’s contact information can be entered into the left hand side.



In the right section are some check boxes that affect how the associate is handled in the Associate Database.



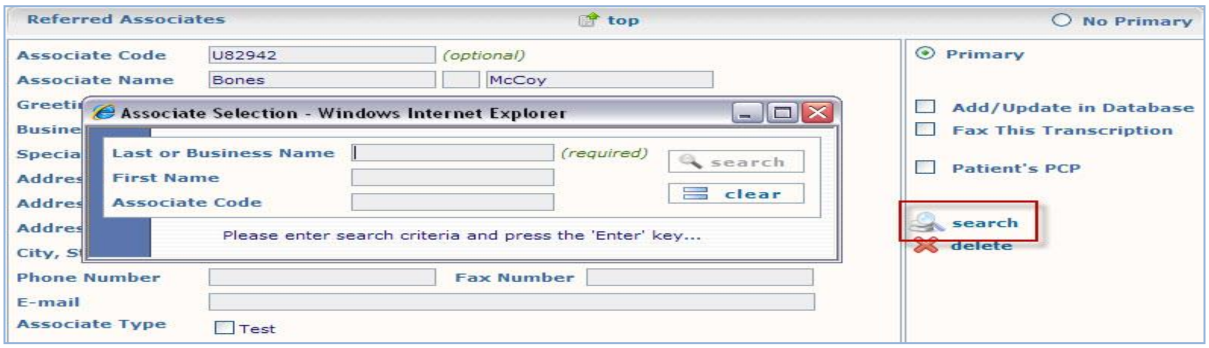
– The **Primary** radial button indicates which associate is the primary associate for the Transcription. Typically the primary associate is the one to whom the letter is addressed. Other associates have been CC’d or Carbon Copied. Only one associate can be made the primary associate. Additionally, if no primary associate is required, there is a radial button at the top of the first Referred Associate labeled “**No Primary**.”

– **Add/Update in Database:** If the associate is new, this check box adds the associate to the Associate Database when the Transcription is saved. If the associate already exists in the Associate Database the associate record is updated with any changes or new information provided.

– **Fax This Transcription:** This check box indicates that an auto fax will be generated for this associate for this transcription. If both Add/Update in Database and Fax This Transcription are both checked, future documents where this associate is added will also be auto faxed.

– **Patient's PCP:** When checked, the copied associate is indicated as the Patient's Primary Care Provider, or PCP. The Primary Care Provider is automatically copied on all transcriptions associated with a specific patient. Primary Care Providers can still be removed from the Referred Associate list.

– **Search:** Search the Associate Database for available associates to add. Associates can be located by Last Name, First Name, and/or Associate Code.



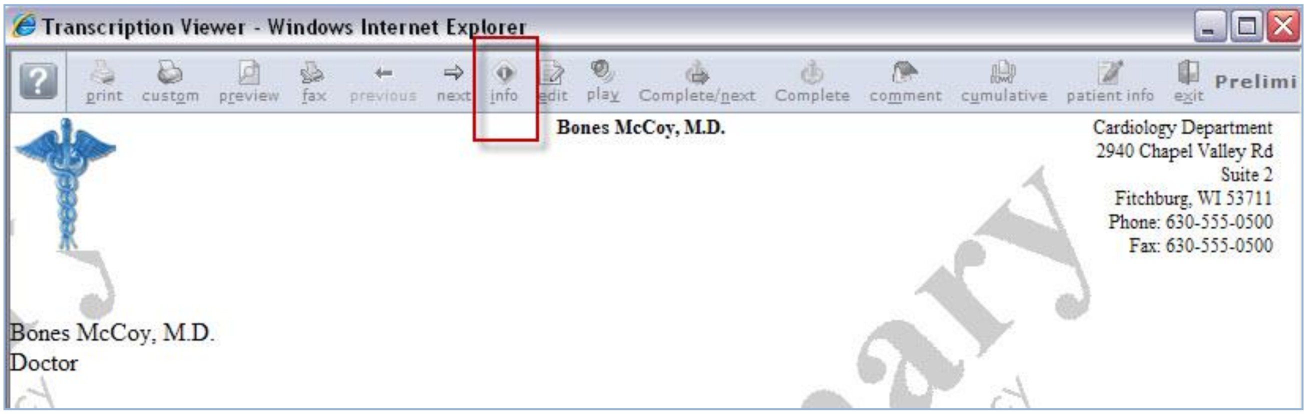
– **Delete:** The Delete button removes the Associate.

Authenticators

The Additional Authenticators section is added using the function button in the Transcription Editor. This section consists of a drop-down box with a list of all the available additional authenticators. If an authenticator is no longer required, the red "X" button will remove the authenticator.

Transcription Info

The Transcription Info button displays information pertinent to the transcription. It also allows users with access rights to move a transcription back to a previous state in the workflow or to invalidate unwanted transcriptions.



Current Status

– The Current status of the Transcription is displayed at the top of the Transcription Information; this indicates the stage of the workflow the transcription is currently in. To the right there is a “Change To:” section with a drop-down menu that has up to three selections: No Change, Invalidated, and Marked for Review. Choose the save option in the upper left to finalize your selection. Note: Not all users will have access to all three options.

– **No Change:** The transcription maintains its current status in the workflow.

– **Invalidated:** The transcription is removed from the standard workflow. Incomplete or unwanted dictations are often invalidated. Invalidating a transcription is similar to moving a file to the Recycle Bin in Windows. The file is “deleted” but could be retrieved. There is no time limit on retrieving invalidated files.

– **Review:** When a user chooses this option the selected transcription is returned to the Marked for Review 1 or Marked for Review2 folders. Typically only dictating users have access to this selection and use it to return a document to the review folder for additional staff editing.

Append and Previous versions

The Append section gives information on which, if any, Transcription IDs are appended to the selected transcription and what status in the workflow they are currently in. Pressing the “Info” button next to each of the Transcription IDs on the list redirects the user to the Information screen for that transcription.

The Prior Versions section allows users to see the previous versions of the Transcription’s body. Demographics are not saved in the prior versions, although a prior version is created anytime changes are made and the save button is pressed in the Transcription Editor. If a prior version is available, clicking on it opens the text in another window. If the user wants to revert to this prior version a restore button is available in the upper right-hand corner of the screen. By default, users do not have access to the prior versions or restore functionality, but it can granted by enabling the Restore/Administrative Log View setting in Client Maintenance > Users settings.

Activity Log

The activity log tracks what activities have been performed for the transcription and the associated user. There are four columns in the Activity Log table. Older activity entries may be hidden but can be revealed using the “View Archived” link. The activity log can be sorted by clicking on the heading.

– **Date:** The Activity Log tracks the date and time that the action was performed.

– **Action:** A brief description of the action performed by the user.

– **Action By:** The user ID or name of the individual who performed the action.

– **Type:** The type of login that was used to execute the action. Note: Some types of logins, like “Associate” are used to indicate automated functions that are carried out by the eScription One server.

Activity

Date	Action	Action By	Type
8/31/10 2:28 PM	Received	warren	InQuiry User
8/31/10 2:32 PM	Checked Out	19798	Transcriptionist
8/31/10 2:34 PM	Promoted	19798	Transcriptionist
8/31/10 2:34 PM	Selected for QA	19798	Transcriptionist
8/31/10 2:35 PM	Manager Delivered	15475	Transcriptionist
8/31/10 2:35 PM	Viewed	warren	InQuiry User
9/1/10 12:24 PM	Moved to Review1	15475	Transcriptionist
9/1/10 12:50 PM	Moved to Preliminary	15475	Transcriptionist
9/1/10 2:48 PM	Viewed	ryadmin	InQuiry User
9/1/10 2:49 PM	Viewed	ryadmin	InQuiry User

view archived

Comments and Comment Tagging

Comments

Comments are used to provide information about a transcription that is not intended to show up on the printed transcription itself. The comment can be used by Medical Transcriptionists or staff members to convey information to providers, or vice versa. The comments can be viewed or edited by clicking on the comment buttons in the Transcription Viewer and Editor, or by using the Comments Icon in the workflow.

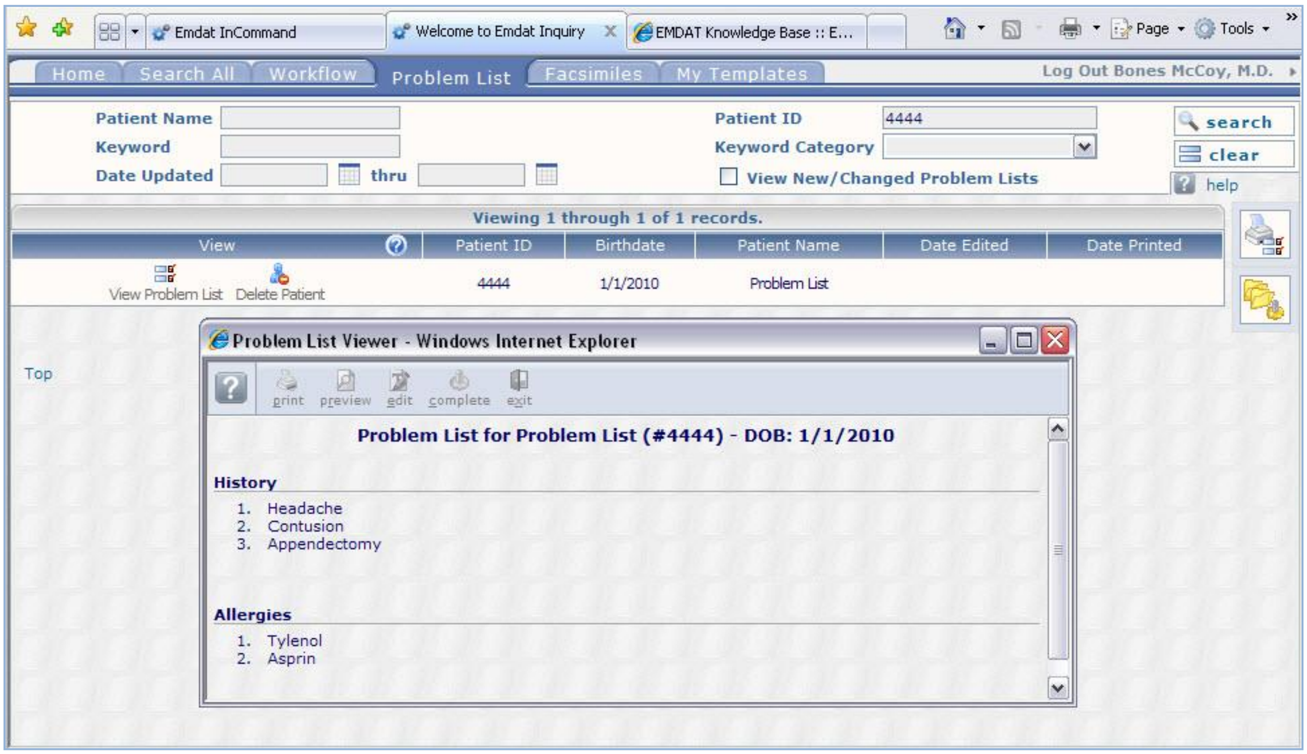
Comment Tags

Comment tags are an optional feature that is used to quickly identify and sort transcriptions in the Review1 and Review2 folders that have common issues. Comment tag names and colors are customizable. Transcriptions with Comment Tags are identified with a unique icon. Transcriptions with multiple Comment Tags appear with a tri-color icon.

Problem List

Problem Lists are rarely used templates that pertain to a specific patient. They are inserted into other dictations similarly to Dictation Templates. However, instead of being associated with a Clinician, the Problem List belongs to a patient, and can be inserted into the patient's documents regardless of the dictating provider. They can be updated by dictating an update or via the Problem List tab. Problem Lists can be divided into multiple categories with customizable headings.

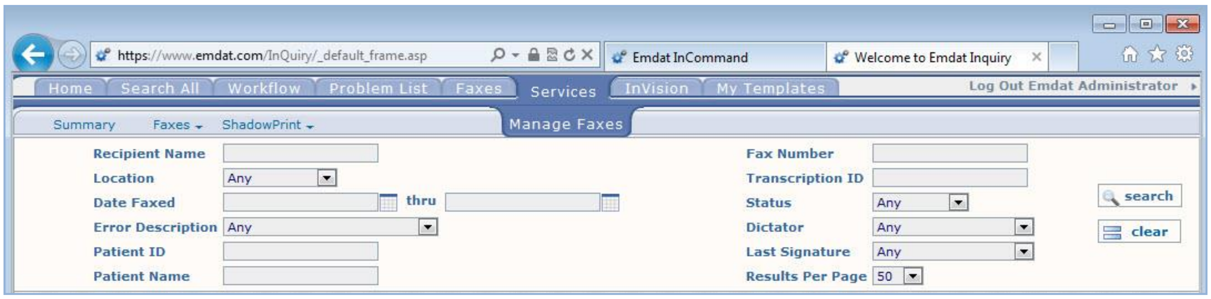
Note: There is an additional monthly fee to maintain problem lists. For additional information, please contact your transcription company.



Facsimiles or Services

Facsimiles or faxes are generated through Fax on Demand or by utilizing the eScription One AutoFax feature. To track faxes or to resend faxes the Facsimiles tab is available. The Facsimiles tab looks similar to the Search All but the search fields have been optimized for searching through faxes and recipients. By default, users do not have access to the Facsimiles tab.

Using the Search button or pressing the Enter key on your keyboard initiates the search. Pressing the Clear button clears the criteria to begin a new search.



Search Criteria

– **Recipient Name:** Search by name for the associate that the fax was sent to.

– **Location:** Search for the Location that the fax originated from.

– **Dates Faxed:** Search for a date range when the fax was created. This field does not search for when the fax was received, but when the fax was created. Additionally, the Dates Faxed field is only used in conjunction with a Status. However, it is not available with faxes that are pending authorization as they have not been created yet.

– **Error Description:** Search for faxes with a specific error. This field is only used in conjunction with the Failed Status.

- **Answering Machine:** The fax server called an answering machine when attempting to establish a connection.
- **Busy:** The fax server received a busy signal when attempting to establish a connection.
- **Error Detected on Line:** The fax server encountered a large amount of interference attempting to establish a connection.
- **Fax Number Length Invalid:** The fax number submitted does not have the required number digits to successfully dial out. All fax numbers must have the 10 digit phone number including area code. Hyphens and dashes are not required.
- **No Answer:** The fax server was unable to connect with any device.
- **On Client Do Not Call List:** The fax server has been attempting to contact a fax machine at the specified number and has repeatedly failed due to Voice Answered or Answering Machine errors and has been automatically added to the Client Do Not Call List. InQuiry users with access to the Facsimiles tab can remove numbers from the Client Do Not Call list with the “Remove DNC” button.

- **On Server Do Not Call List:** A fax recipient has called in and requested that eScription One place the fax number on the Do Not Call list. Numbers on the Server do not call list affect every client. Only eScription One may remove a number from the Server Do Not Call List.
- **Transmission Error:** The fax server was interrupted or lost the connection while transmitting the fax.
- **Voice Answered:** A human voice answered the fax server's connection attempt.

– **Patient ID:** Search by Patient Medical Record Number.

– **Patient Name:** Search by Patient Name or partial.

– **Fax Number:** Search by the fax number the transcription was sent to.

– **Transcription ID:** Search by the Transcription ID of the sent fax.

– **Status:** Search by faxes in a specific status.

- **All Faxes:** if this field is blank, the search looks for all faxes regardless of the status.
- **Pending Authorization:** Faxes that are waiting for approval to send. This includes faxes that are waiting to pass the auto-fax trigger.
- **Queued:** Faxes that are created and waiting in the fax server queue to be faxed.
- **Failed:** Faxes that were created but failed to successfully send.
- **Succeeded:** Faxes that were successfully sent to the recipient.
- **Cleared:** Faxes that were removed from the failed fax list. Failed faxes that have been selected for refax are automatically cleared.

– **Last Signature:** Search for the last authenticator listed on the Transcription.

Pending Faxes

Use the Pending Faxes page to search for TIDs that will queue up for AutoFax, but that have not passed the AutoFax trigger point. Pending Faxes is located in the Services Tab, under the pull-down menu "Faxes."

The Search Criteria are similar to those in the standard Faxes tab.

– **Recipient Name:** Search by name for the associate that the fax was sent to.

– **Location:** Search for the Location that the fax originated from.

– **Patient ID:** Search by Patient Medical Record Number.

– **Patient Name:** Search by Patient Name or partial.

– **Fax Number:** Search by the fax number the transcription was sent to.

– **Transcription ID:** Search by the Transcription ID of the sent fax.

– **Dictator:** Search by the Clinician that dictated the TID.

– **Last Signature:** Search for the last authenticator listed on the Transcription.

– **Results Per Page:** Specify the number of TIDs that will display per page.

Facsimiles Functions

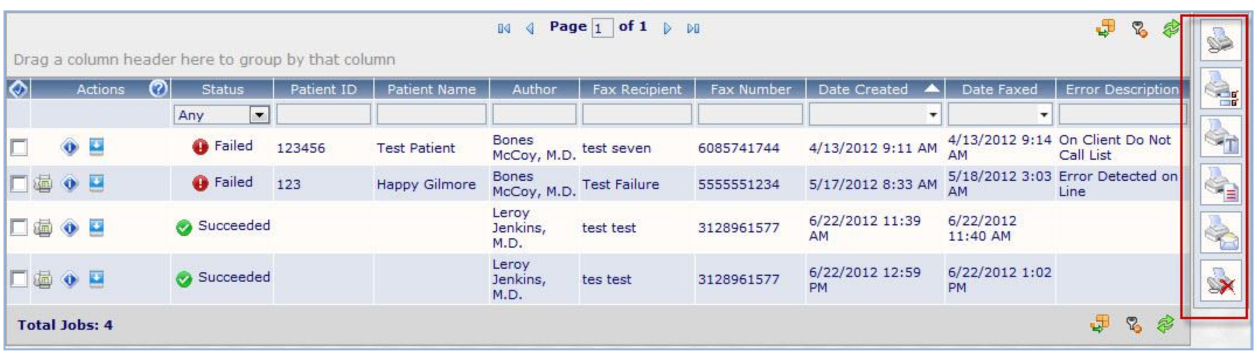
– **Refax Selected Faxes:** Queues up selected faxes to send to the same fax number again.

– **Print Selected Faxes:** Prints the Transcription as it would appear when faxed.

– **Print Selected Transcriptions:** Prints the Transcriptions as they appear in InQuiry.

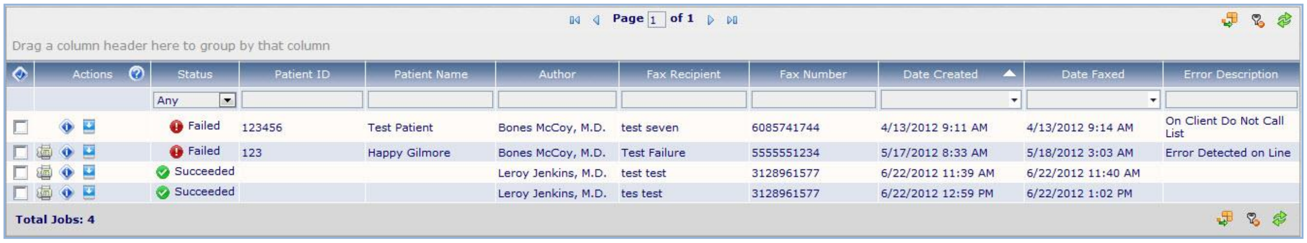
– **Print Selected Cover Letters:** Prints the Cover Letters for selected Transcriptions.

– **Print Selected Envelopes:** Prints the Envelopes for selected Transcriptions.



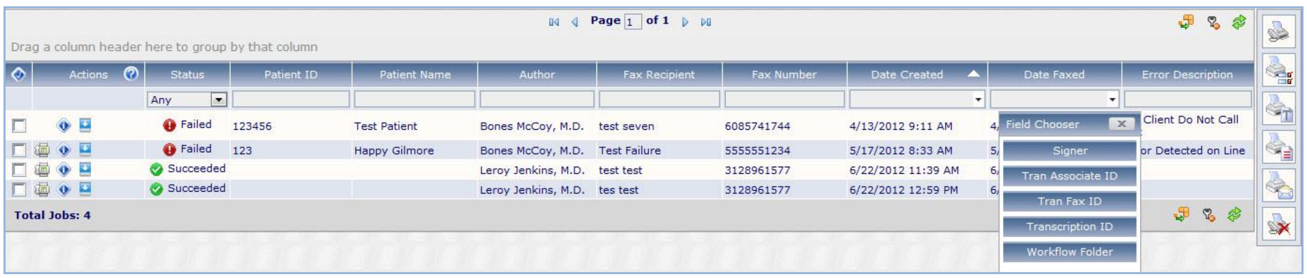
Grouping and Sorting

The listed search results are very customizable so that users can easily find the report based on specific criteria.

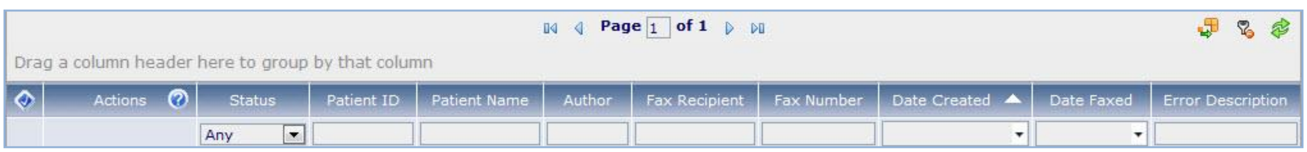


– **Grouping Section:** Click and Drag an available column to this area to group reports by that column's criteria.

– **Column Names:** Click on a column to sort by that column. Columns can be added or removed using the Choose Column button. The available columns are Status, Patient ID, Patient Name, Author, Fax Recipient, Fax Number, Date Created, Date Faxed, Error Description, Signer, Tran Associate ID, Tran Fax ID, Transcription ID, and Workflow Folder.

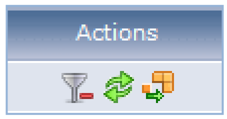


– **Filtering Row:** The Filtering is used to further refine a search for a specific value. To search for a specific value type or use a pull-down menu in the appropriate column. The results automatically refresh when another field is selected or tabbed to.



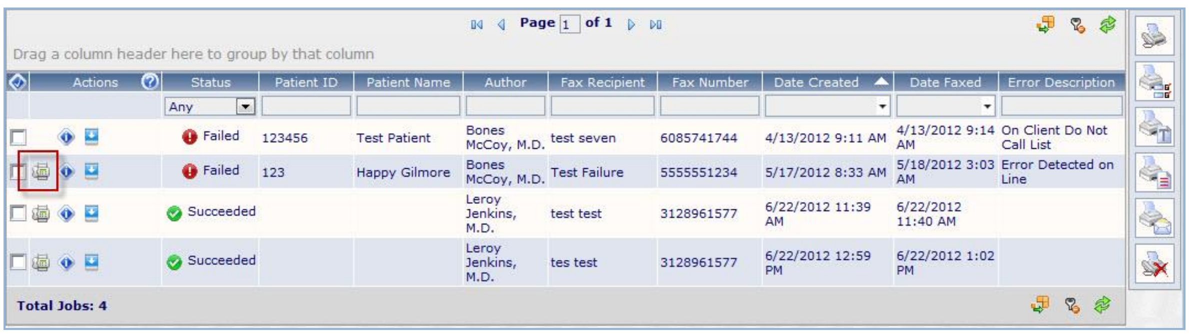
– **Actions (Filtering Row):** The following actions are available in the filtering row:

- **Clear Filters:** Available only when filters have been chosen, this button clears out all specified filters.
- **Refresh:** Refresh search results using newly specified filters.
- **Choose Columns:** Add or remove columns from the Report list.



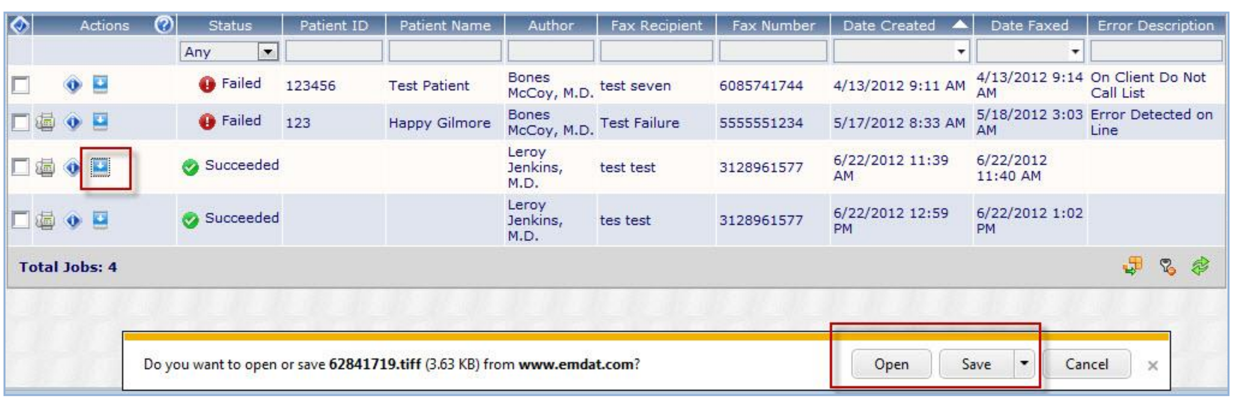
Facsimiles Icons

– **Refax:** Queue the fax to resend to the same fax number.



– **Info:** Display the Info screen detailed in section 8.

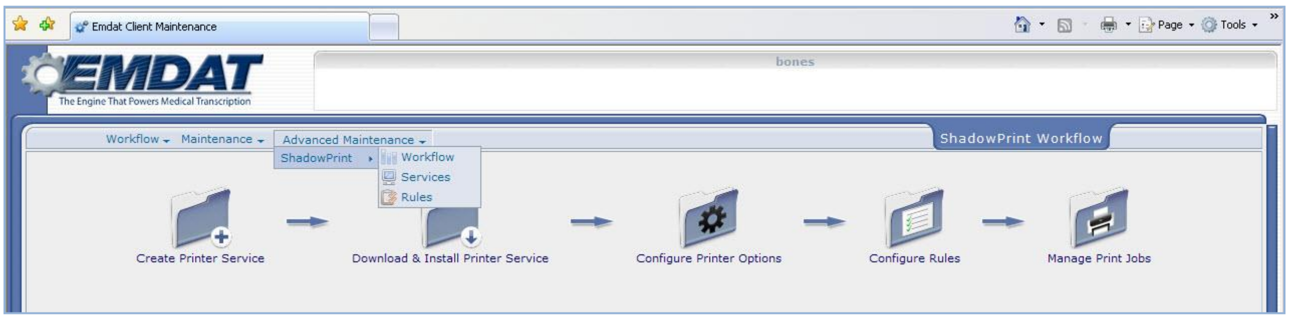
– **Download:** Download the TIFF image generated that is sent through the fax service.



Shadow Print

Also under the Services Tab, Shadow Print is a service that automatically prints transcriptions to a specified printer after the document has passed a trigger point in the workflow. Shadow Print is managed through the InQuiry application and has a manual for installation, configuration, and maintenance. The Shadow Print manual can be found here:

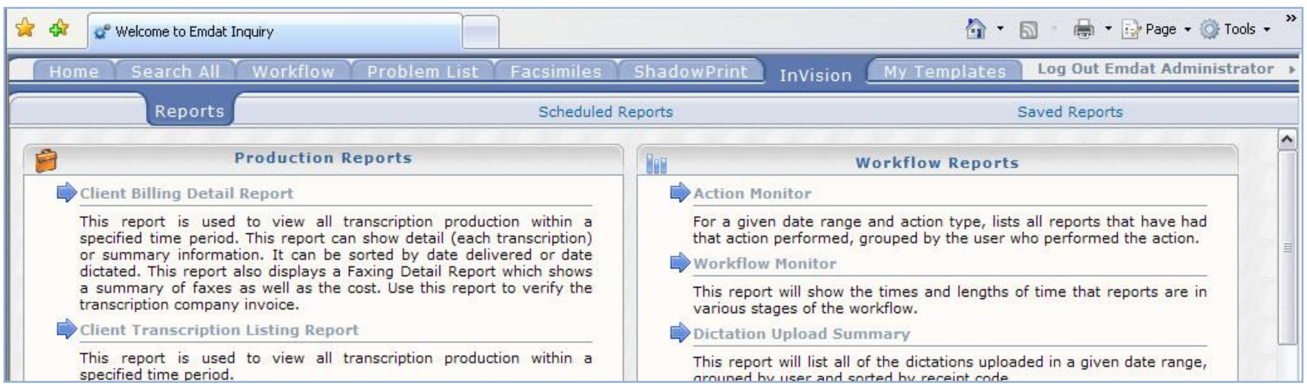
https://www.escription-one.com/Software/ShadowPrint



InVision

The InVision tab contains the administrative reporting tools. By default, InQuiry users do not have access to the InVision tab. Access to the InVision tab does not indicate that the user has access to all reports.

Reports



Clicking on a report takes you to the New Report tab.

New Report

Run Now / Configure Schedule

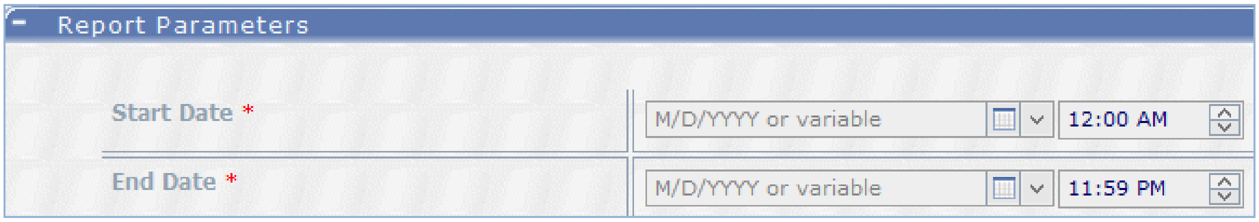
Reports can be run immediately or scheduled to run once or on a reoccurring basis.

– **Run now** – Select this option to run the selected report now without the results going to the Scheduled Reports tab. Once completed, the report is presented in a new Internet browser window. Reports can be saved as a file after they are complete.

– **Configure Schedule** – Select this option for reports that take longer to run, need to be run on a reoccurring basis, or need to run at a specific time in the future. Reports that are scheduled appear in the Scheduled Reports tab. Scheduled reports are saved as files and once complete can be downloaded in the Saved Reports tab.

Report Parameters

The options in this section change depending on what report is selected. Parameters with a red asterisk beside the name are required. Below are some guidelines for date fields:



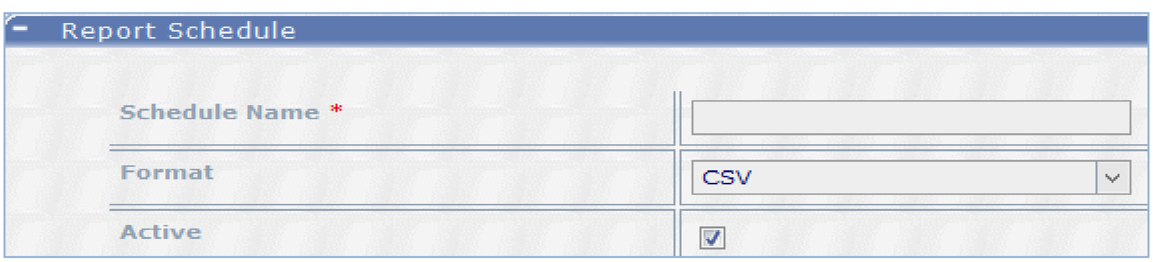
– For Reports to be run immediately: enter a date as 'm/d/yyyy', such as 2/25/2010. Or click the Calendar control button and select the date from the pop–up calendar.

– For Scheduled Reports: Click the down–arrow to select relative system dates. All relative dates are dependent on the date when the report actually runs. After selecting a relative system date, it can be modified by entering plus (+) or minus (–) and the number of days.

– The available relative dates are:

- **Today** – @Today
- **Yesterday** – @Today - 1
- **First Day of Current Month** – @FirstOfMonth
- **First Day of Previous Month** – @FirstOfPreviousMonth
- **Last Day of Previous Month –** @LastOfPreviousMonth
- **First Day of Current Quarter** – @FirstOfQuarter
- **First Day of Previous Quarter** – @FirstOfPreviousQuarter
- **Last Day of Previous Quarter** – @LastOfPreviousQuarter

Report Schedule



If Configure Schedule is selected at the top of the window, this section will be available.

– **Schedule Name** – Use this field to give the report a unique name that will be recognizable in the list of saved reports.

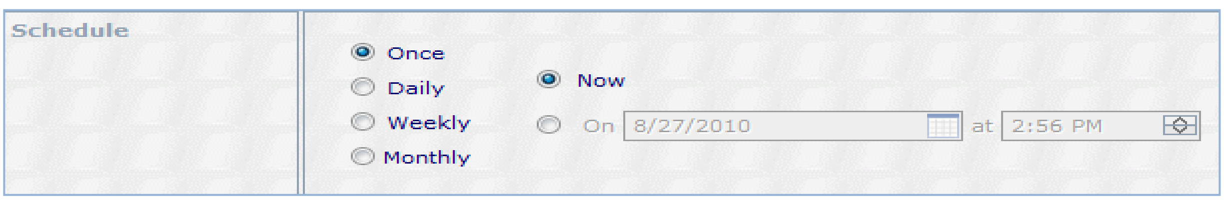
– **Format** – The following formats are available:

- **CSV** – 'Comma–separated values' reports contain the raw report data in comma–separated fields. These reports can be opened in Excel.
- **MHTML** – 'MIME HTML' reports opens using Internet Explorer when viewed.
- **PDF** – 'Portable Document Format' reports opens using your default PDF viewer.
- **XML** – 'Extensible Markup Language' reports contain the raw report data in XML format.

– **Active** – Use this checkbox to determine if the scheduled report will be active. Inactive reports will still be added to the scheduled reports tab, but will not run automatically. They can still be run manually.

– **Schedule** – Select how often the report will run.

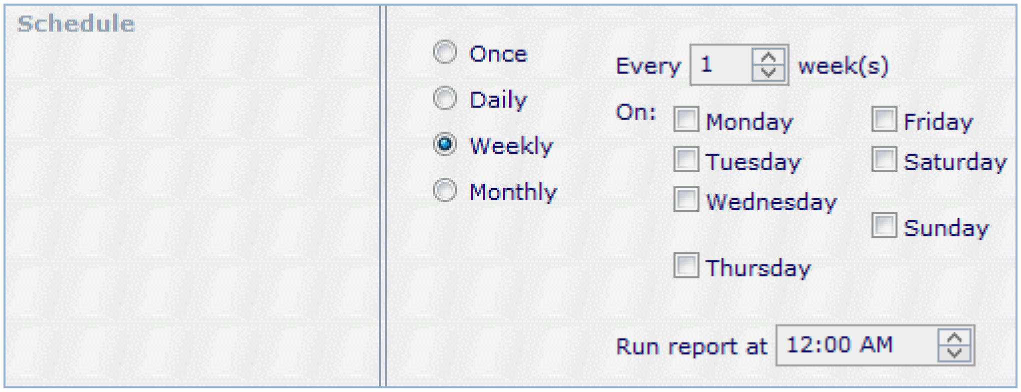
- **Once** – The report will run a single time and be added to the user's Saved Reports.
  - **Now** – The report will run immediately.
  - **On** – The report will run at the specified date and time.



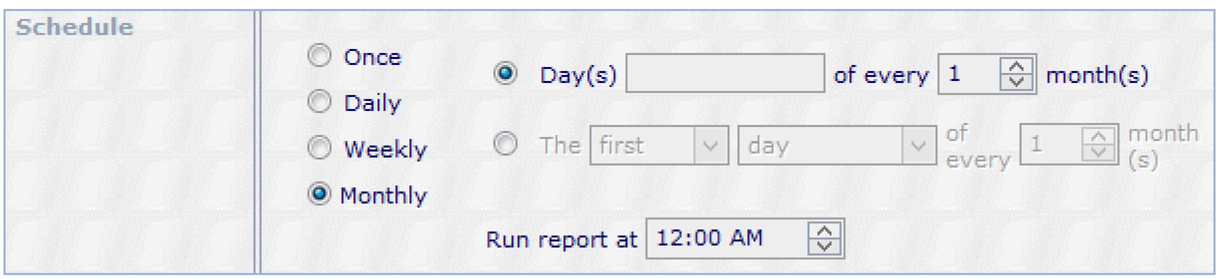
- **Daily** – The report will run every day based on schedule criteria. The report will appear in Saved Reports each time the report is run. Also select the time the report will run on the days scheduled.
  - **Every __ Day(s)** – The report will run every X days depending on the value entered. Maximum entry is every 6 days.
  - **Every Weekday** – The report will run every weekday.

- **Weekly** – The report will run every week based on schedule criteria. The report will appear in Saved Reports each time the report is run. You can select what time the report will run on the days scheduled.
  - **Every __ Weeks(s)** – The report will run every X week depending on the value entered. Maximum entry is every 52 weeks.

- **On** – The report will run on the selected day(s) of the week.



- **Monthly** – The report will run every month based on schedule criteria. The report will appear in Saved Reports each time the report is run. You can select what time the report will run on the days scheduled.
    - **Day(s) __ of every __ month(s)** – User can select that the report run on a certain day or days (comma delimited list of days) of every X months. Maximum entry is every 12 months.
    - **The __ __ of every __ month(s)** – User can select that the report run during a specific week on a specific day of every X months. Maximum entry is every 12 months.



Scheduled Reports

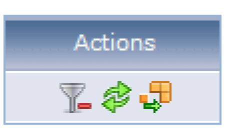
This lists the reports scheduled in InVision. The list is very customizable so that a report can be found based on specific criteria.

– **Grouping Section** – Click and drag an available column to this area to group reports by that column's criteria.

– **Column Names** – Click on a column to sort by that column. Columns can be added or removed using the Choose Column button discussed below. The available columns are: Category, Last Modified, Modified By, Owner, Owner ID, Is Active, Description, Format, Last Run, Next Run, Status, and Report

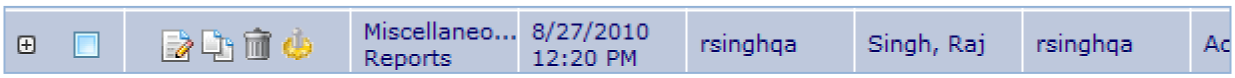
– **Filtering Row** – This row allows you to input specific information into the available columns to limit results by those criteria. To enter search criteria, type the information or use the pull-down menu in the appropriate column. The results automatically refresh when another field is selected or tabbed to.

– **Actions (Filtering Row) –** The following actions are available in the filtering row:



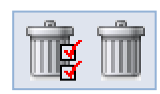
- ○ **Clear Filters –** This button is only available if there are current filters. This button clears out all filters that are specified.
- ○ **Refresh –** This button refreshes search results using the selected filtering criteria.
- ○ **Choose Columns –** This button adds or removes columns from the Report List.

– **Report Information –** Use the Plus and Minus buttons to expand or contract information about individual reports or groups. Information about the report, schedule, and specified parameters are available when clicking on an individual report's row.

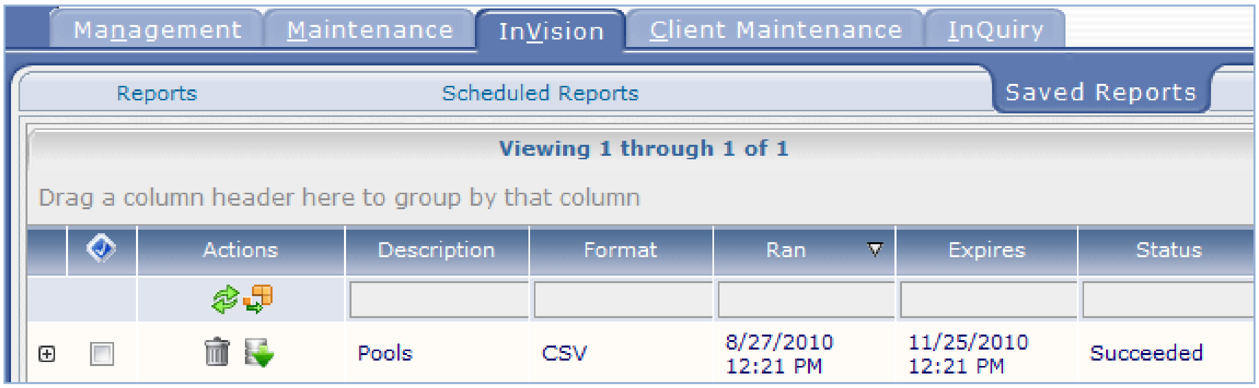


- ○ **Check Box –** Use this checkbox to mark the report as Selected. All checkboxes are selected with the button to the left of the Actions column name.
- ○ **Edit Button** – Clicking this button opens a new window with options that are the same as InVision > New Report. Changes that are saved will modify the report in the row of the edit button clicked.
- ○ **Copy Button** – Clicking this button opens a new window with options that are the same as InVision > New Report. Changes that are saved will create a new report row in the scheduled reports list.
- ○ **Delete Button –** This button deletes the scheduled report. To keep a scheduled report, edit it so that it is inactive rather than deleting it.
- ○ **Run Button –** This button runs the scheduled report immediately in the same way that selecting Run Now in InVision > New Report would do.

– **Delete Selected / All buttons –** Use these buttons to delete selected schedules or all schedules in the current filtered list. Use the checkbox located in the report information to select specific reports for use with the Delete Selected button.



Saved Reports

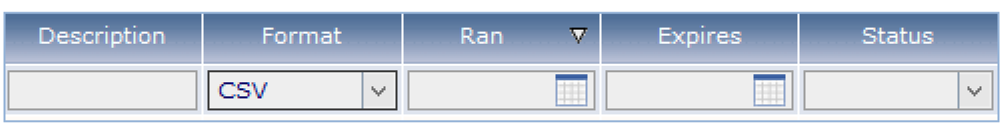


This lists the reports that have run based on the schedule in InVision. The list is very customizable so that you can easily find the report based on specific criteria.

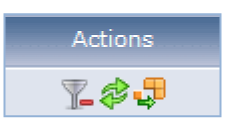
– **Grouping Section** – Click and drag an available column to this area to group reports by that column's criteria.

– **Column Names** – Click on a column to sort by that column. Columns can be added or removed using the Choose Column button discussed below. The available columns are: Category, Owner, Owner ID, Scheduled, Subscription, Ran, Expires, Description, Format, Status, and Report.

– **Filtering Row** – This row allows users to input specific information into the available columns to limit results by those criteria. To enter search criteria, type the information or use the pull-down menu in the appropriate column. The results automatically refresh when a new field is selected or tabbed to.



– **Actions (Filtering Row) –** The following actions are available in the filtering row:

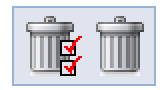


- **Clear Filters –** This button is only available if there are current filters. This button clears out all filters that are specified.
- **Refresh –** This button refreshes search results using the selected filtering criteria.
- **Choose Columns –** This button adds or removes columns from the Report List.

– **Report Information –** Use the Plus and Minus buttons to expand or contract information about individual reports or groups. Clicking the report row prompts you to download or open the report file. The report file type is specified in the schedule.

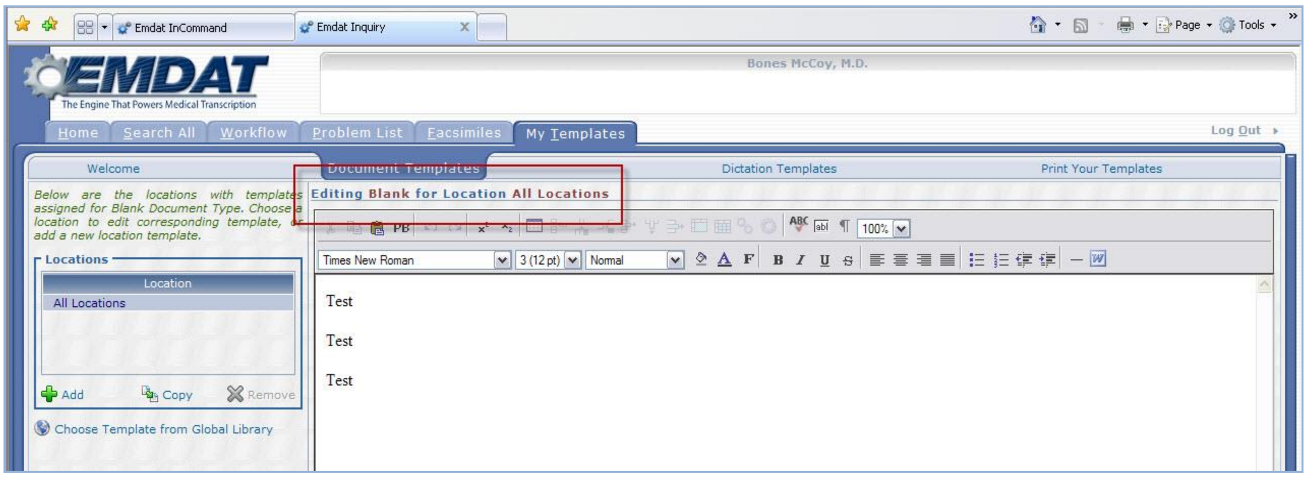
- **Check Box –** Use this checkbox to mark the report as Selected. You can select all checkboxes with the button to the left of the Actions column name.
- **Delete Button –** This button deletes the scheduled report. To keep the scheduled report, edit it so that it is inactive rather than deleting it.
- **Download Button –** This button prompts you to download or open the report file. The report file type is specified in the schedule.

– **Delete Selected / All buttons –** Use these buttons to delete selected schedules or all schedules in the current filtered list. Use the checkbox located in the report information to select specific reports for use with the Delete Selected button.



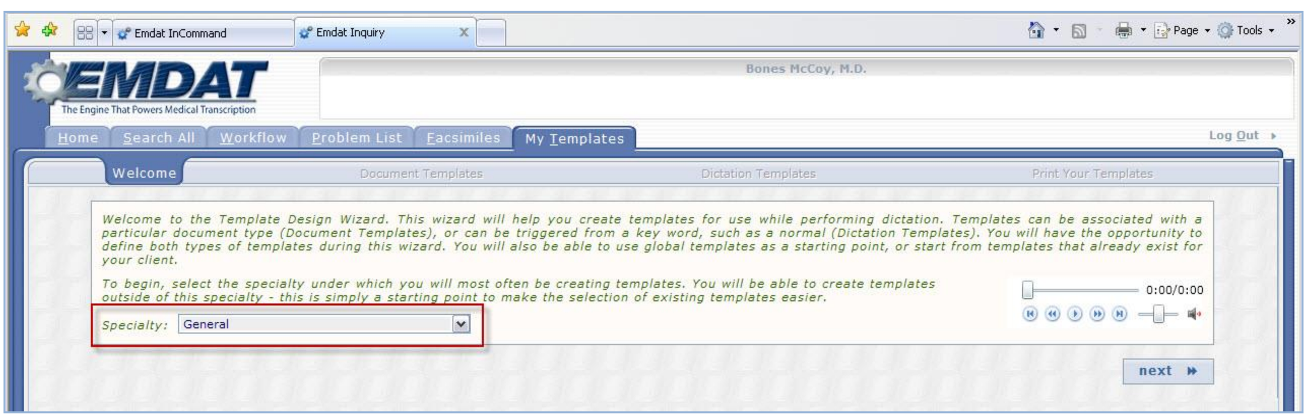
My Templates

My Templates navigation tab allows dictating users to create and modify document templates to suit specific needs. Creating document templates assists the Medical Transcriptionists in creating completed documents quickly and accurately. Additionally, it helps ensure that documents are uniform and complete. The My Templates navigation tab consists of four sub tabs and is inactive by default.



Welcome

The Welcome tab is intended for new users and provides a brief overview of the My Templates tab. Users can select a specialty on this page or leave it unchanged from the default of 'General.' Choosing a specialty allows the user to select from a library of sample or default document templates in the Document Templates and Dictation Templates sub tabs.

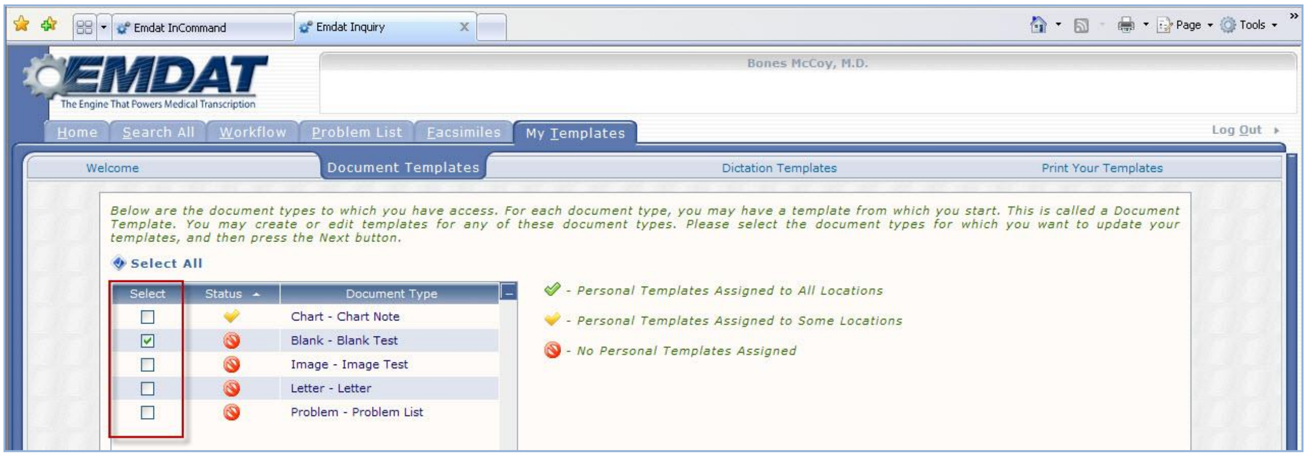


Note: On most My Templates screens a Silverlight audio player is available to guide users through the functionality of the page. Users who do not have Microsoft Silverlight installed will be prompted to install it before the audio tutorials can be played.

Document Templates

Document Templates establish a framework for the Medical Transcriptionist to work in. When a typist first receives a dictation, it is also downloaded with the associated document template. After selecting a specialty from the Welcome sub tab a list of available Document Types are displayed. Each document type can have multiple document templates, one for each location. Alternately, a single document template can be created for all locations or any combination.

To begin editing, select one document type from the list and choose next.



At the top of the window the Document Type and Location are indicated in red.

On the left, locations that have document template associated with them are listed. Selecting a location in this window opens the associated template in the edit window.

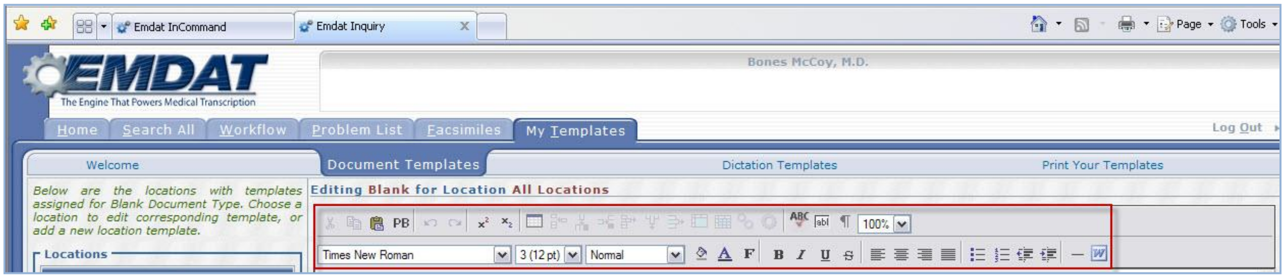
– **Add:** Select to add a location to the list of available templates.

– **Copy:** Select to copy the document template of one location to another.

– **Remove:** Deletes the location and the template associated with it.

– **Choose Template from Global Library:** Opens the template library associated with the specialty selected (if any) on the Welcome sub tab. Choosing a template overwrites any existing text. Document templates in the Library can be previewed before updating the existing template.

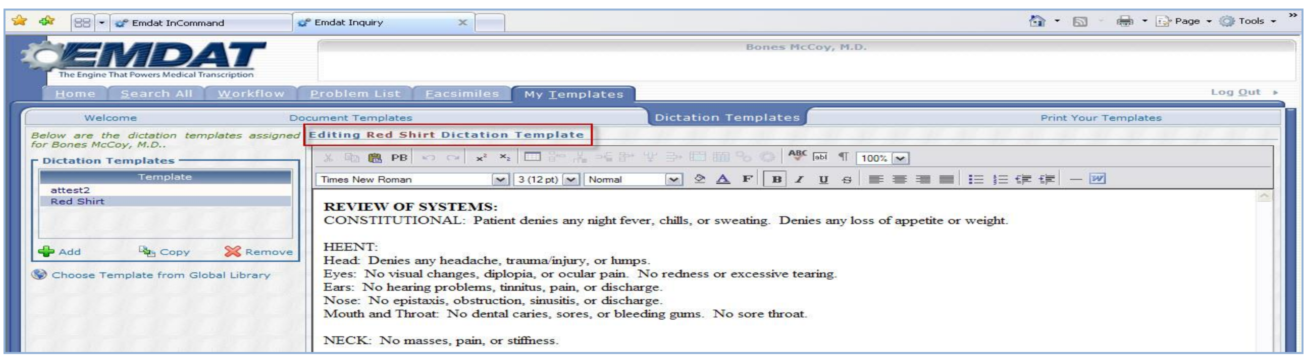
The Document Template can be further modified by using the editor window. All of the tools available in the Transcription Editor are available to use when modifying a Document Template.



Dictation Templates

Dictation Templates are similar to Document Templates except that they are not associated with any particular Document Type or Location. Dictation Templates are also sometimes called “Normals” and can be inserted at any time into any document.

At the top of the window the Dictation Template selected is indicated in red.



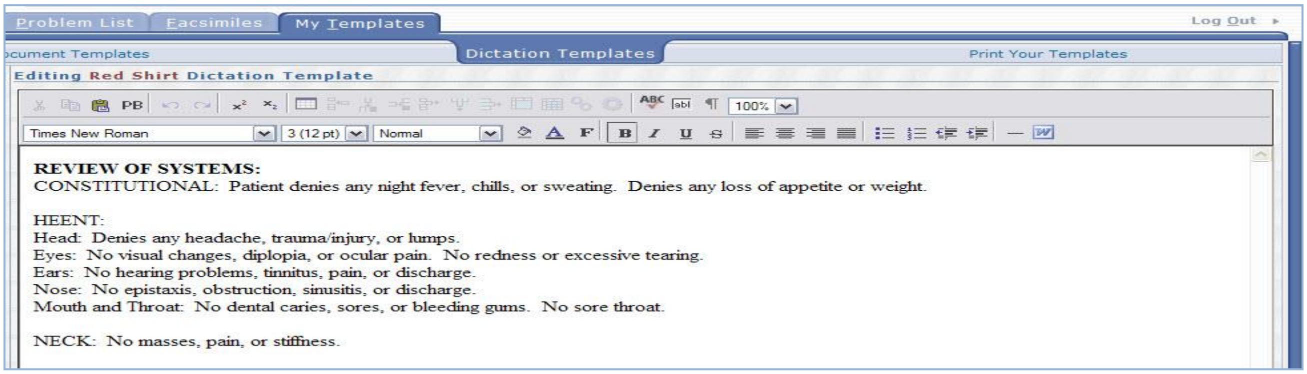
Existing Dictation Templates are listed on the left. Selecting a Dictation Template opens the template in the editor window.

– **Add:** Select to add a new Dictation Template.

– **Copy:** Copy an existing Dictation Template to a new name.

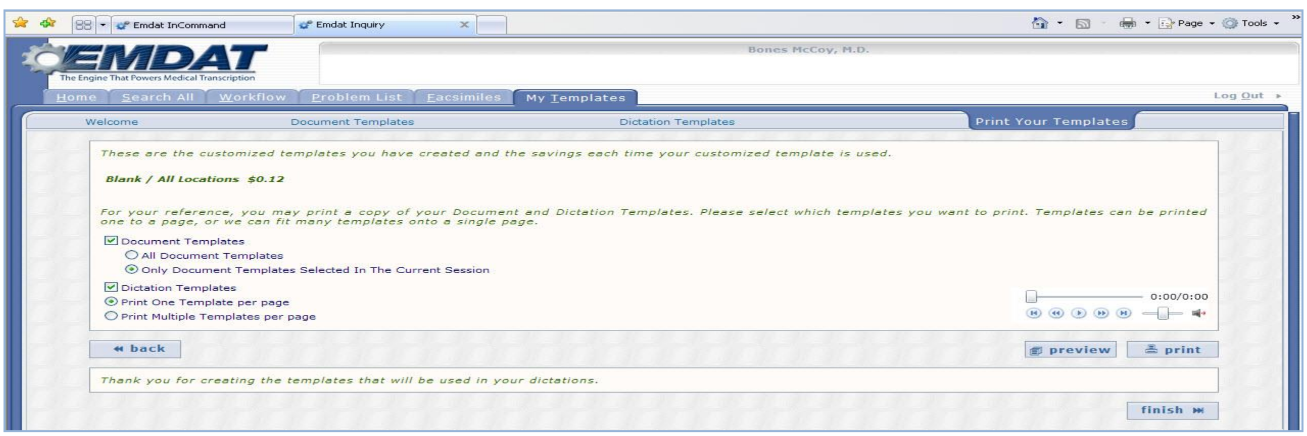
– **Remove:** Deletes the Dictation Template. Note: Dictation templates that are available to all dictating users cannot be deleted.

The Dictation Template can be further modified by using the editor window. All of the tools available in the Transcription Editor are available to use when modifying a Dictation Template.



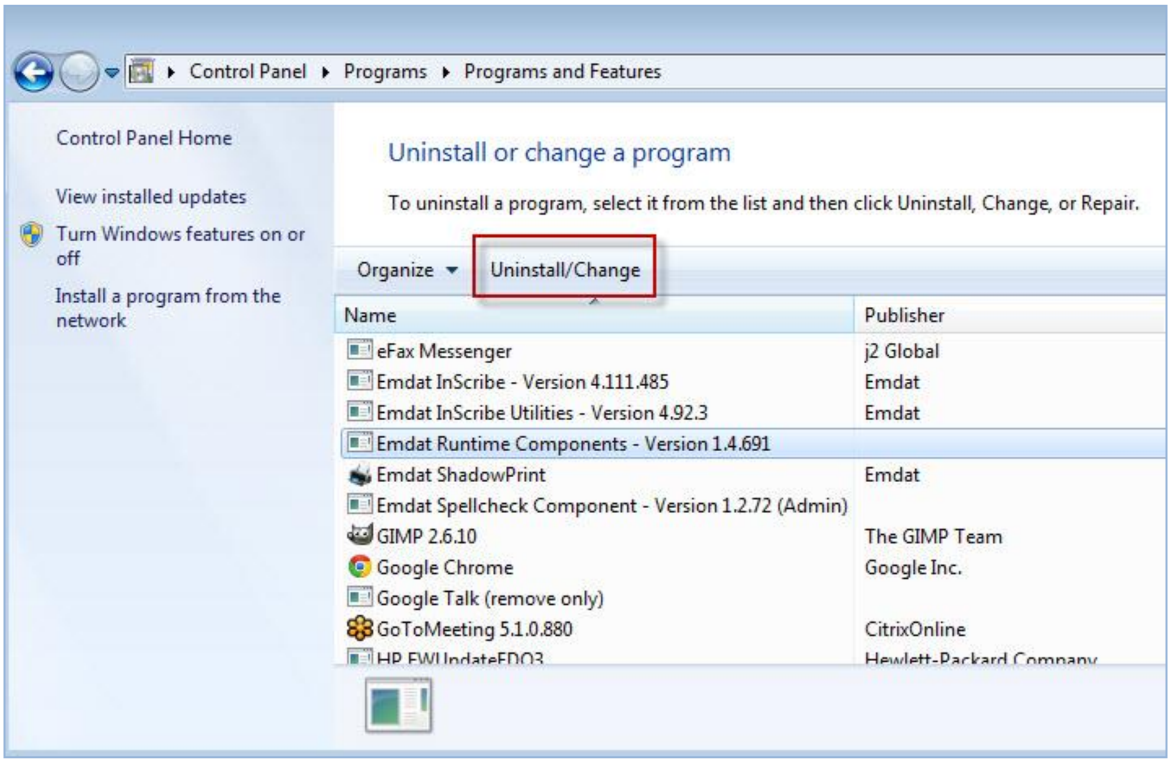
Print Your Templates

Print Your Templates allows users to print out their dictation and document templates for review or personal records. Document Templates, Dictation Templates or both can be printed. If a user selects multiple documents to edit in the Document Templates sub tab, the user has the option of printing only those templates.



Removing InQuiry Components

Remove InQuiry components by accessing the Control Panel and Add/Remove Programs (Windows XP) or Programs and Features (Windows Vista and 7) Section. Locate the application eScription One Runtime Components and choose the option to Uninstall.



Support

Get assistance for InQuiry and all other eScription One applications.

Phone Support: 1-800-858-0880

Support Email: eSOne@nuance.com