

InQuiry User Guide

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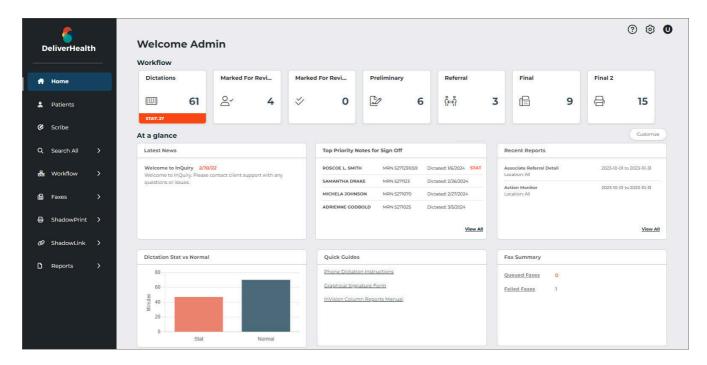
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1 Introduction to InQuiry

InQuiry is a highly customizable HIPAA-compliant web-based application with various features that allows health care providers to attend live scribe sessions, as well as review, edit, search, and electronically authenticate transcriptions. InQuiry integrates a patient demographic database, referring physician information, and the facility's Electronic Health Records (EHR) 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.



1.1 Requirements

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

Minimum Requirements:

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

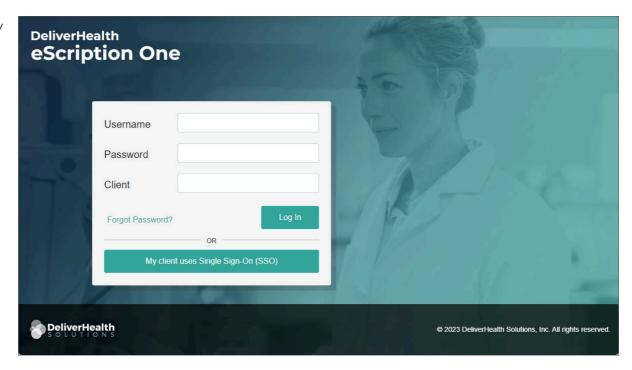
Recommended Requirements:

• Windows 10 or higher

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

2 Logging In to InQuiry

InQuiry is a web-based



application that can be accessed from a web browser. Obtain a username, password, and client code from your company's system administrator prior to logging into InQuiry.

Navigate to the proper regional website:

Australia https://www.escription-one.com.au/inquiry/

Canada https://www.escription-one.ca/inquiry/

United States 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. eSOne recommends users keep login information confidential and not share login information with other users.

If Single Sign On (SSO) has been enabled for your client, please see the eSOne SSO Configuration and User Guide for more details.

If multi-factor authentication (MFA) has been enabled for your client, please see Setting up Multi-Factor Authentication.

The **Forgot Password?** link next to the Login button allows users who have saved a valid email address to receive password reset instructions by email if it is lost or forgotten. For more information see Email Verification and Password Reset.

Once successfully logged in, InQuiry displays the Home tab. The navigation tabs appear along the left side 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.

2.1 Setting Up Multi-Factor Authentication



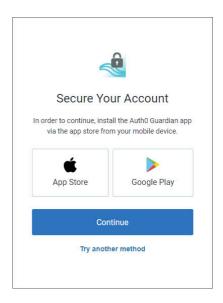
Note

Other authentication apps may work, but Auth0 Guardian is the only officially supported authentication app used by eSOne.

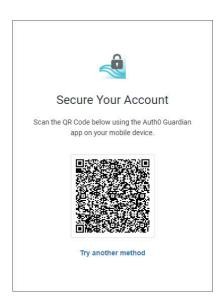
Multi-factor authentication is another way to verify a your identity, adding an extra level of security to the login process. If your client has MFA enabled there will be a one-time procedure that requires you to download an authentication application called Auth0 Guardian onto your mobile device and create an account. Subsequent log ins will only require you to accept a notification sent to your mobile device. This one-time procedure does not need to be repeated for each client app.

MFA Initial Setup

- 1. Navigate to the InQuiry log in page.
- 2. Enter your username, password, and client code and click **Log**In or press Enter.
- 3. Download the AuthO Guardian app.
 - a. If the Auth0 Guardian app is not installed on your phone, install it from the Apple store (for iPhone) or Google Play (for Android). Choose the appropriate button from the InQuiry log in page to view the app in the store, or search for 'Auth0 Guardian' in the app store.
 - b. Open the Auth0 Guardian app after installation has completed.
- 4. In InQuiry, click **Continue** on the 'Secure Your Account' screen to proceed.
- 5. Scan the Activation (QR) code.
 - a. Next, use the authentication app to scan the activation code that appears in InQuiry by holding your phone up to the code. This will link the authentication app to your InQuiry application.



- b. If the scanner does not automatically open, you may need to click the plus button at the top of the Guardian screen to add a new account.
- 6. Copy the Recovery Code.
 - a. After scanning the code, you will receive a recovery code (in InQuiry). If you need to log in and do not have your mobile device, you can paste or enter this code to access InQuiry. Copy the code and keep it somewhere safe.
 - b. If this is the first time you are using Auth0, the authentication app will also provide a recovery code for you to copy to a secure location.
- 7. Click the check box indicating that you have recorded the code, then click **Continue**.



You now have an account to which a notification request will be sent each time you log in to InQuiry or the eSOne mobile apps.

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

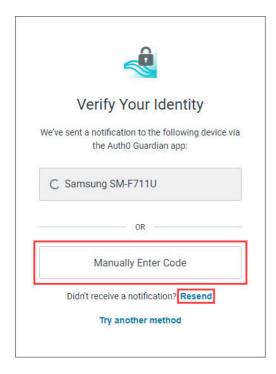
2.2 Logging in with Multi-Factor Authentication

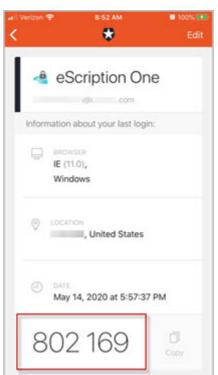
Once you have completed the initial MFA setup process above, you will subsequently log in to InQuiry as shown in the steps below:

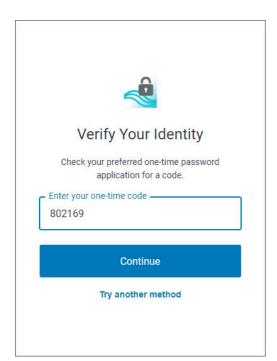
- 1. In InQuiry, enter your login credentials.
- 2. The 'Verify Your Identity' screen opens, indicating that a notification has been sent to your phone and is awaiting confirmation.
- 3. Tap **Allow** in the banner notification or in the Guardian app.

After successful authentication, you will automatically be logged into InQuiry.

If you do not receive the notification, you can have the notification resent, or you can choose **Manually Enter Code**.







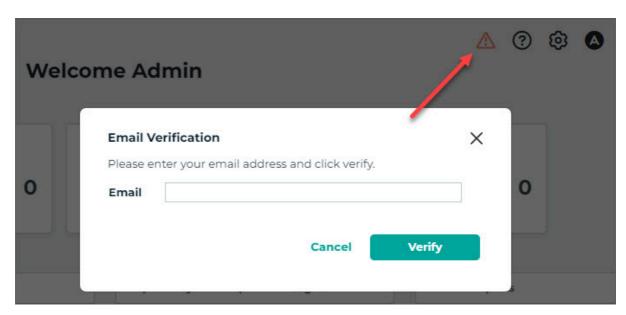
Open the Guardian app and choose your InQuiry profile. Enter the code from the bottom of the Guardian app into InQuiry.

Click **Continue** to complete the log in process.

Administrators can reset MFA in Client Maintenance for users who cannot log in with MFA after having done so previously.

2.3 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, along with an alert in the upper right corner. 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.

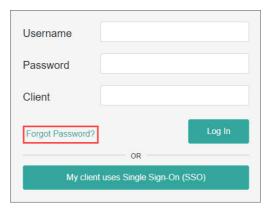
The user can type an email address in the Email Verification window and press the Verify button. This will send a verification email to that email address containing a link. When the link is clicked the email address will be verified and the user will no longer be prompted to enter and verify an email 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 an orange alert icon in the upper right corner of InQuiry. This icon can be clicked to open the Email Verification window. The alert icon will be removed after an email address has been verified.

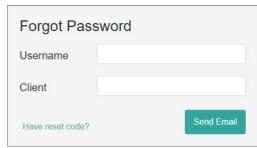
If an email address needs to be edited the user can click on the gear icon to open the Settings menu, click Preferences, then edit or enter an email address in the Password Reset Email field. The verification process will need to be repeated.

2.4 Password Reset

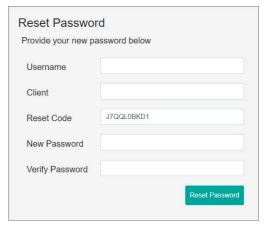
If the user has forgotten their password, it can be reset using the steps below. A verified email address is required to reset an InQuiry password (see Email Verification).

- 1. On the login screen, enter the Username and Client code, then click Forgot Password?
- 2. On the 'Forgot Password' screen click either the **Send Email** button or **Have reset code?** link (if a reset code has already been received via email). An email will be sent to the user's verified email address with instructions and a link for resetting the password.





- 3. Click the link in the email to open the 'Reset Password' screen with the reset code populated. Enter the remaining information, then click the **Reset Password** button. If 'Have reset code?' was clicked, the 'Reset Password' screen appears without the reset code filled in. Enter the code from the email and remaining information, then click the **Reset Password** button.
- 4. If the password is successfully changed a confirmation message will appear. Return to the InQuiry log in page to log in with the new password.



3 Navigating InQuiry

InQuiry is designed to provide easy and intuitive navigation, enhanced productivity, and information at a glance. It is organized into a group of user menus in the top right corner and navigational tabs along the left side.

3.1 User Menus

Three user menus appear in the upper right corner and persist throughout InQuiry.

3.1.1 Help Menu

The Help menu provides references to assist providers.

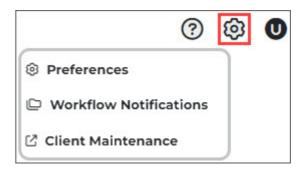
Help Desk - Provides contact information for support. To navigate here go to ② in the upper right corner then select Help Desk.



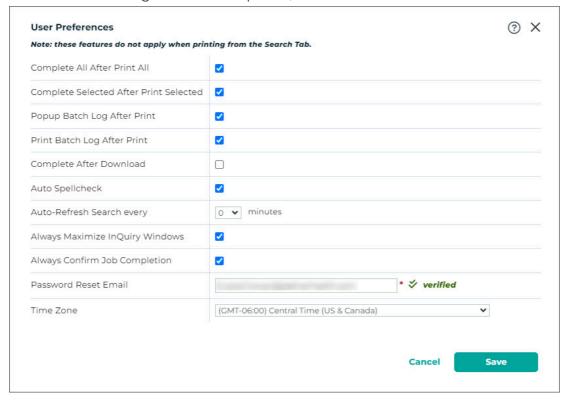
Phone Dictation Help - Downloads the InTouch Telephone Dictation Instructions. To navigate here go to ② in the upper right corner then select Phone Dictation Help.

3.1.2 Settings Menu

The Settings menu contains options to personalize the user experience, setup notifications, and access Client Maintenance.



Preferences - 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 browser and not to the user login. This means users can have different preferences selected when using different computers/browsers.



To navigate here go to **6** in the upper right corner then select Preferences.

Password
Reset Email is
used to reset
forgotten
passwords.
Email
addresses can
be changed
and verified
here. The
verification
status is

displayed next to the email address. See Email Verification for more information on the verification process.

The **Save** button saves changes and closes the User Preferences window. The **Cancel** and Close X buttons close the window without saving changes.

Toggle additional help text with 🔊.

Workflow Notifications - Allows InQuiry users to receive email notifying them of the number of transcriptions in their Preliminary and/or Referral folders. Notifications can be enabled for one

X **Workflow Notification Options** The address entered here will be sent an email on the specified days of the week if there are any transcriptions in the user's Preliminary or Referral folder. demo_user@esodemo.com ✓ Real Time Notification Notification Week Days for Preliminary Notification Week Days for Referral ✓ Include Users To Which I Have Proxy Select All Thursday - 05:00 PM ☐ Sunday Tuesday Wednesday ☐ Thursday ☐ Friday ☐ Saturday Add Notification Day/Time Remove Notification Day/Time Ok Cancel

folder or both.

To navigate here go to in the upper right corner then select Workflow
Notifications.

The notification email address does not have to match the verified user email address. Multiple email address can be entered, separated by a semi-colon (;).

Check the **Real Time Notification** box to
receive emails as
transcriptions

become available for signature in the Preliminary folder.

When enabled, the **Include Users To Which I Have Proxy** option will send real time and/or scheduled email notifications for jobs in your Preliminary folder for providers to whom you have proxy.

To schedule Preliminary folder notifications, click **Add Notification Day/Time**, select the day(s) of the week and hour, then click **Ok**. To delete a notification, select it from the list then click **Remove Notification Day/Time**.

Notifications for the Referral folder are always sent at 7 AM in the client's time zone and are generated on the selected days.

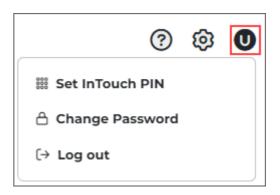
Client Maintenance - Opens Client Maintenance in a new browser tab and allows users to modify client setup, Associates, Patients, Documents, Users, Templates, ShadowPrint options, and other advanced features.

To navigate here go to ${\mathfrak G}$ in the upper right corner then select Client Maintenance.

Access to this link does not necessarily confer access to all these features and is typically reserved for system administrators and advanced users.

3.1.3 User Profile Menu

- Set InTouch PIN Allows the dictating user to set or change an InTouch PIN to access the dictation review function of InTouch telephone dictation system. This option will only appear if the client has an InTouch emulation that supports dictation review.
- **Change Password** This link allows a user to change their password. The password requirements configured for the client are shown at the top of the screen.
- **Log Out** Logs the user out and returns to the log in page.



3.2 Navigation Menu

The application's primary features are structured within intuitive tabs along the left side. The navigation menu can be collapsed to allow for more working screen space or expanded for easy navigation by toggling the arrow that appears when the mouse pointer is in the menu area. Clicking on a parent navigation menu item will open the first sub-menu item.

The navigation menu and related sub-menus can include:

- Home
- Patients
- Scribe
- Search All (Basic Search, Invalidated, Faxes)
- Workflow (A sub-menu includes each folder enabled and accessible by the client and user)
- Faxes (Manage Faxes, Pending Faxes)
- ShadowPrint (Services, Rules, Transcriptions)
- ShadowLink (Services, Patient, Associate, & Document Deliveries)
- Reports (Home, Scheduled Reports, Saved Reports)

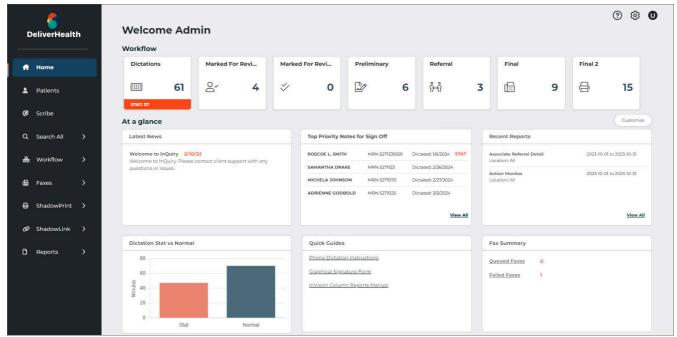


Note

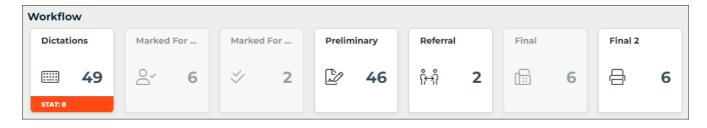
Access to several of the tabs is dependent on user permissions. The available tabs may differ between what is shown in this user guide.

4 Home Tab

The Home tab is the first view after logging in and allows a quick view of the status of transcriptions, reports, and services.



4.1 Workflow Summary



The Workflow summary provides a graphical representation and numerical count of documents as they go through the workflow. Only active folders are displayed in the workflow summary. Active folders the user does not have access to are shaded gray and do not open the folder when clicked. Only Documents the user has access to are counted in the summary.

Click on a workflow folder to navigate to the folder, where transcriptions can be viewed, edited, printed, signed, and more. The workflow summary persists across the top of the page when viewing any workflow folder to allow for easy navigation throughout the workflow. Jobs that have been completed from the last workflow folder are only viewable in Search All, but jobs still in the workflow can also be found in Search All.

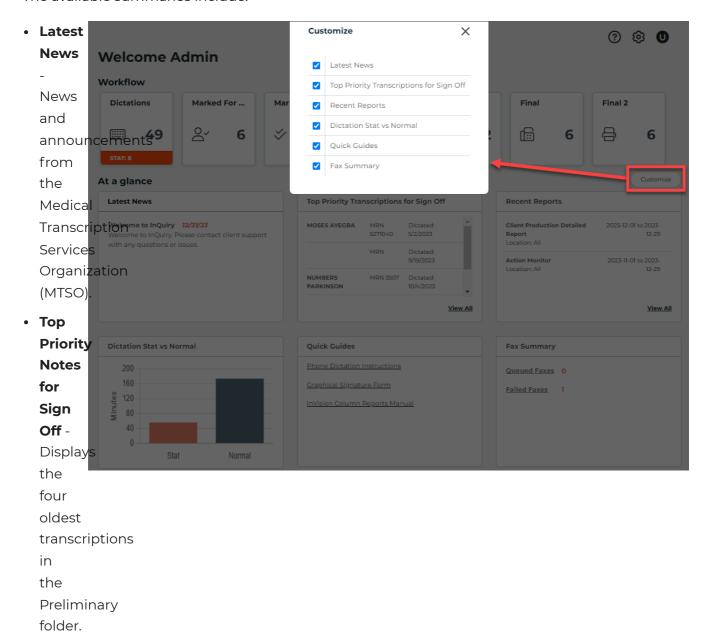


The labels of workflow folders are customizable for the client and may not match was is displayed in this user guide.

4.2 At a Glance

This dashboard provides summaries of information to help the user focus on areas of importance. The dashboard can be customized to include only relevant summary cards. Click the **Customize** button and check the boxes for each summary box to be displayed on the Home tab of InQuiry. Summary boxes can be rearranged by placing the cursor in the box where the cross arrows appear, hold down the left mouse button and drag the box into place.

The available summaries include:

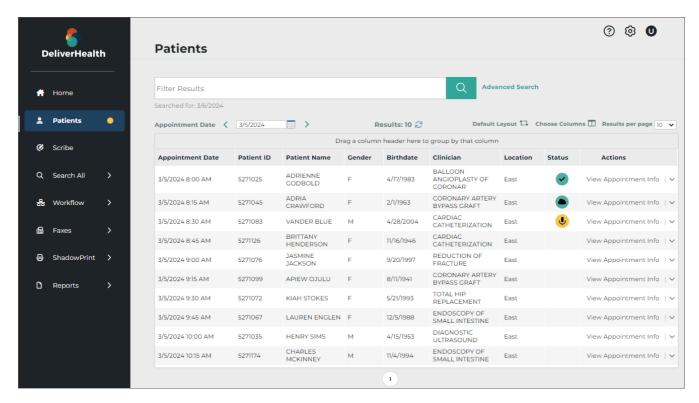


Click on **View All** to navigate to the Preliminary Folder. This card is only available if the user has access to the Preliminary folder.

- **Recent Reports** Displays the last three reports that were scheduled to run (does not include one-time-run reports). Click on a report title to open the report or **View All** to open the Scheduled Reports tab to run a new report.
- **Dictation Stat vs Normal** Displays a bar graph illustrating the number of dictation minutes for STAT and non-STAT jobs for a comparison view.
- Quick Guides Provides links to useful guides, forms, and user guides.
- Fax Summary Displays a count of queued and failed faxes. Clicking on Queued Faxes or Failed Faxes will run a query for all queued or failed faxes, respectively.

5 Patients

The Patients tab provides a daily view of patient appointments and the option to record dictations for appointments directly from InQuiry. The schedule view is only available to clients who provide an appointment data feed.



Upon opening the Patients tab, the current day's schedule loads based on schedule resources assigned to the logged-in user and the appointment data feed received from the client.

5.1 Patient Appointment Filter

To find a particular patient appointment, enter filter criteria in the filter box and press Enter or click

Only the data fields displayed in the grid will be searched for matches. Clear the search box to display all appointments for the chosen date. A patient search cannot be performed without an appointment date.

Multiple data types can be searched at once by separating the data with a space. For example, to find an appointment with "Knee" in the appointment reason field and "Derk" in the patient name, type "knee Der" in the search text box.

Click **Advanced Search** to enter additional search parameters.

Contains - Search
 by full or partial
 data to match in
 any data field
 displayed in the
 search results grid.

• Patient First Name

- Search by the patient's full or partial first name.

• Patient Last Name

- Search by the patient's full or partial last name.
- Patient ID Search by the patient's full or partial MRN.

• Appointment Date

- Select a single date to search for the patient. This field is required.

· Resources -

Specify which appointment resource code to filter by. Only resource codes assigned to the user will be displayed in the selection list. Select All to show matches from all resource codes.

 Order Number -Search by the full

		×
Contains		
Patient First Name		
Patient Last Name		
Patient ID		
Appointment Date	1/2/2024	
Resources	All 🗸	
Order Number		
	✓ clear	Q search
	of clear	Q search

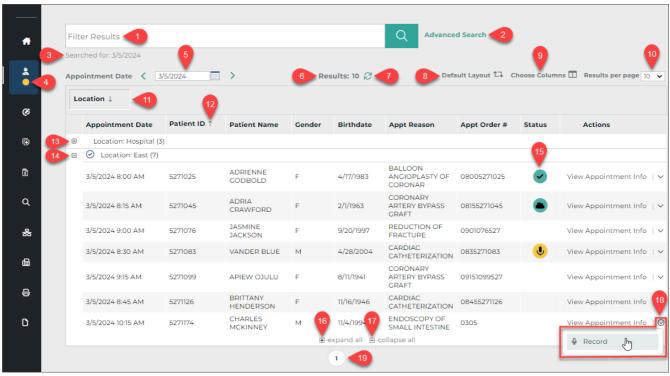
or partial appointment order number.

Click the **clear** button to remove all advanced search criteria and display all appointments for the selected date, or **search** to perform the patient search.

If the search criteria needs to be removed from Advanced Search use the **clear** button in the Advanced Search window; clearing the Search text box will not clear the Advanced Search criteria.

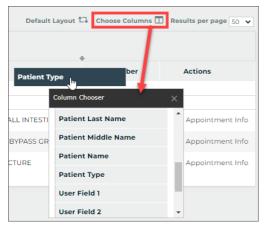
5.2 Patients Data Grid

The data grid displays patient appointments that match the search criteria and can be customized by changing the included fields, grouping, and sorting.



- 1. Filter Results Allows filters to be applied to the appointments for the given date.
- 2. **Advanced Search** Opens the Advanced Search window to apply search criteria to specific data fields.
- 3. **Searched for** Displays the submitted search criteria from Advanced Search.
- 4. **On-hold Dictation Indicator** A yellow dot appears in the Patients tab of the left navigation menu when a dictation has been recorded but not uploaded.
- 5. **Appointment Date** Type a date into the text field or click the calendar icon to choose a date from the calendar.
- 6. **Results** Displays a count of matching appointment records.

- 7. **Refresh** The refresh button performs the same search again.
- 8. **Default Layout** Resets the data grid to the default layout, removing any changes previously made to the included columns, grouping, and sorting.
- 9. **Choose Columns** Opens the Column Chooser. Drag columns from the chooser to the desired location in the grid to add a new column. Drag a column from the grid to the Column Chooser to remove a column.

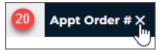


- 10. Results per page Choose how many appointment records to return per grid page.
- 11. **Group** Drag any column header from the grid or Choose Columns window to the grouping row to group the results based on that data criteria. For example, drag Location to the grouping row to group all appointments at the same location together. Multiple groups can be added. Groups will automatically be used to sort the data. Click the group column to toggle between ascending and descending order.
- 12. **Sort** Click any column header to sort results by data in that column. Click the column header again to toggle between ascending and descending order. The sort order will be identified by an up arrow (ascending) or down arrow (descending). To sort by multiple columns hold the Shift key while clicking the column headers; data is sorted by the first column added to the sort, then by the second column added, and so on. To remove the sort from a column hold the Ctrl key while clicking the column header.
- 13. **Expand Group** Click + at the head of a collapsed group to display all records within the group.
- 14. **Collapse Group** Click at the head of an expanded group to hide all records within the group.
- 15. **Status** Displays the dictation state for the corresponding appointment. Blank - No dictations have been started or received for the appointment.
 - The appointment has a dictation that has been started but not yet uploaded.
 - A dictation has been uploaded for this appointment from another device.
 - A recorded dictation for this appointment has been successfully uploaded from this device.
- 16. Expand all Click to display all records for all groups.

- 17. Collapse all Click to hide records for all groups.
- 18. Actions A list of available actions to take. The default action is to view appointment details.
- 19. Reorder Drag and drop columns to reorder grid columns.



20. **Remove Column** - Hover the mouse pointer over the column header and click X, or drag the column into the Choose Columns window to remove it from the grid.



5.3 Patients Actions

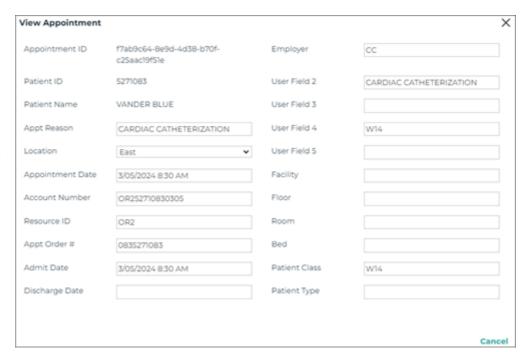
Two actions can be performed in the Patients tab. The default action will be performed when the Actions column text is clicked. Click the Actions menu expansion button \vee to display an additional option.



5.3.1 View Appointment Info

the Patients grid is to view the appointment details. Click **View Appointment Info** in the Actions column to open a read-only view of appointment information.

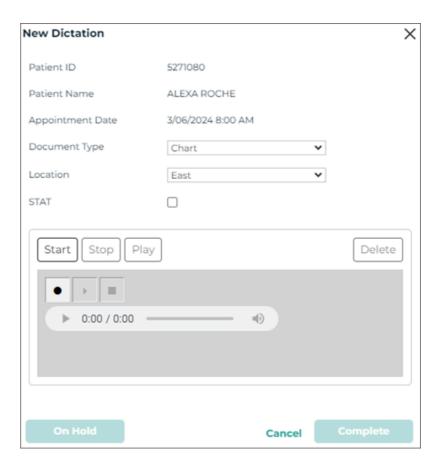
The default action in



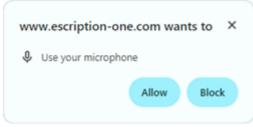
5.3.2 InQuiry Dictation

Dictations can be recorded and uploaded directly from InQuiry. A microphone device is required.
Choose **Record** from the Actions menu to begin a new dictation or resume an on-hold dictation for the corresponding appointment.
Dictations cannot be recorded without an appointment.

The New Dictation record window will open displaying the Patient ID, name and appointment date. The document type and location can be selected. If the user or client has a default document type and/or location, those will be pre-selected, but can be changed using the selection list. The STAT check-box allows the STAT status to be toggled on and off. Marking a dictation as STAT may incur additional charges.



5.3.2.1 Recording and Playback Controls



Click **Start** or the Record button • to begin recording. Access to the microphone must be granted to continue. There will be a slight delay while the microphone initializes. Audio is being recorded when "Duration" is displayed below the recording controls.

The **Stop** buttons become active when recording or playback begins. Press either button to stop recording. Recording can be resume by pressing either record button. Additional dictation will always append to the end of the recording.

The recorded audio can be played back after recording has stopped. Press any of the three **Play** buttons to begin playback. The seek bar slider can be used to change the position of the playback, but does not change where additional recorded audio is inserted.

To increase or decrease the playback volume, hover the mouse over the speaker icon to open the volume slider, then click or slide the volume position as needed. Click the speaker icon to mute the playback volume.

5.3.2.2 Upload Dictations



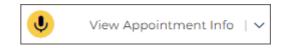
After recording the dictation press the **Complete** button to upload it to eSOne. The New Dictation window will remain open until the upload has completed and a confirmation window appears. The appointment will display a check-mark in the Status column to indicate a dictation has been completed from InQuiry on this device.

An uploaded dictation cannot be played back from the Patients tab. Navigate to the Dictations folder in the InQuiry Workflow tab to play the dictation (note that the folder may have a different name).

If additional dictations are needed for the same appointment, select **Record** from the actions menu. Subsequent dictations will not be appended to the first dictation at the time of upload, but can be appended later in the workflow.

5.3.2.3 Save and Delete Dictations

To save a started dictation without uploading it, press **On Hold**. A confirmation message will display and the Status column will indicate a dictation has been placed on hold.

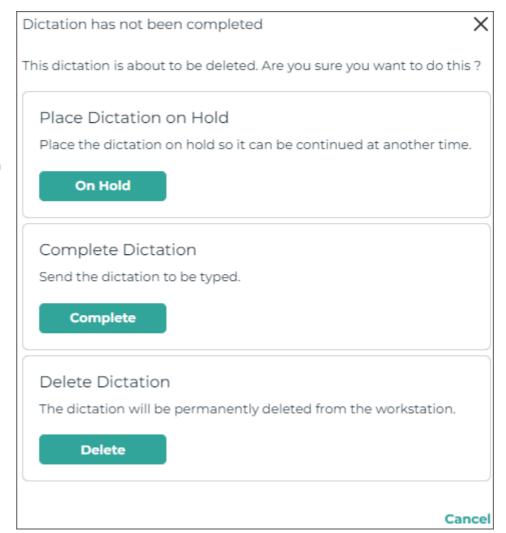


The left navigation menu will also have a yellow dot to indicate there is at least one dictation on hold in the Patients tab.

To complete or add to an on-hold dictation, choose **Record** from the Actions menu for the given appointment. The saved dictation will load. Press **Record** to append additional audio to the end of the dictation or **Complete** the dictation to upload it to eSOne.

To delete a started or onhold dictation open the record window, click **Cancel, Delete,** Close X or press the **Esc** key.

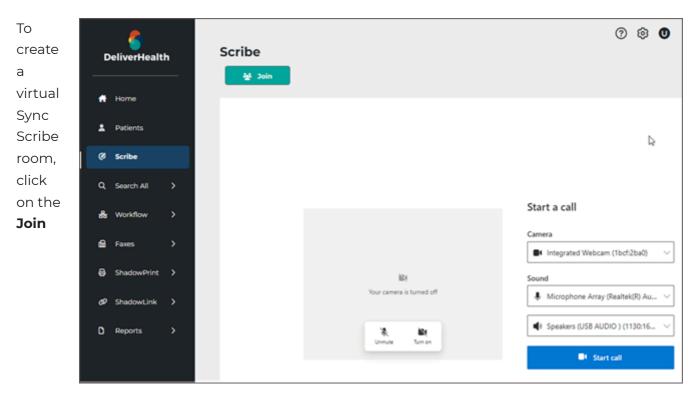
A dialog will prompt for an action: Place Dictation on Hold, Complete Dictation, or Delete Dictation. Choose **Delete Dictation** to remove the dictation without uploading it to eSOne. Once the dictation has been deleted it cannot be restored.



6 Scribe

DeliverHealth's **Synchronous Scribe** solution lifts the burden of documentation so providers can focus on what matters most – spending time on patient care. Providers connect with our highly trained medical scribes in real time. The scribes listen to the encounter and create a structured EHR note for physicians to review and sign off on.

6.1 Starting and Joining a Scribe Room



button. The call settings will load prior to the room opening.

If multiple cameras, microphones, or speakers are connected choose which devices to use by expanding the selection list for each device. If only one device is found it will be selected by default. Devices can also be changed after joining the scribe room.

The camera is turned off and the microphone is muted prior to joining the scribe room. Click on the microphone icon in the camera preview window to toggle mute on and off. Click on the camera icon to toggle the camera on and off. When the camera is turned on a preview will appear.

Click Start call to join the scribe room and begin the call.



The browser will request permission to use the camera and microphone upon starting the first call. Permission must be granted to join a synchronous scribe call. If permission is granted and saved, access will not need to be granted for each call.

6.2 Scribe Room Notification

Multiple scribes may join the scribe room, but only one provider can join. If a scribe begins the call before the provider, the provider will receive a popup notification in InQuiry, similar to report notifications, stating the scribe room has been opened and by whom. This notification is only presented when the

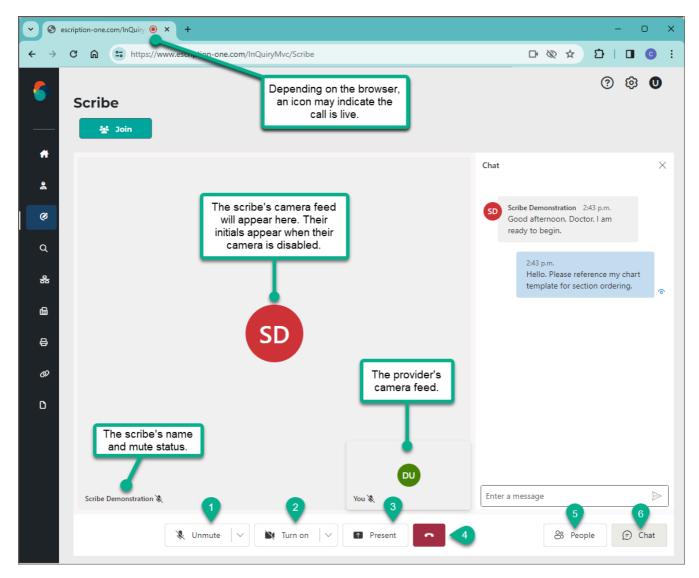


provider is not in the Scribe tab.

The notification contains a link to join the scribe room directly. Scribe rooms can also be joined by navigating to the Scribe tab, then click **Join**.

6.3 Scribe Room Controls

The scribe room offers features for audio, video and screen-share, with a simple layout to allow for easy interaction with the scribe and focused attention on the patient.



Microphone Controls

- Click **Unmute** and **Mute** to toggle the microphone on and off.
- Click v to expand the microphone device list and choose a different microphone.

Camera Controls

- Click **Turn on** and **Turn off** to toggle the camera on and off.
- Click ∨ to expand the camera device list and choose a different camera.

3 Present

- Click Present to share a browser tab, Window, or Entire Screen with the scribe room participants.
- Upon clicking **Present**, the provider can choose which content to share.
- Click **Stop Presenting** to end screen-share.

4 End Call

- Click to end the call.
- People Click to view a list of room participants.
- The participant list will replace the chat feed. Click Chat to return to the feed.
- **Chat** Click to read and send scribe room messages.
- Messages received from other participants will include their name.
- · Messages are shown in ascending order by time received with the newest message at the bottom.
- To send a message, type in the text box and press Enter or click >.
- The chat history is deleted daily at midnight.
- The chat feed replaces the participant list. Click People to return to the list.

If a scribe has not joined the room, the provider's camera feed or initials will be displayed in the main camera box, depending on if the camera is enabled. Once a scribe has joined the room their camera feed or initials will fill the camera box and the provider's camera feed or initials will be displayed in the lower right corner of the camera box.



Alert

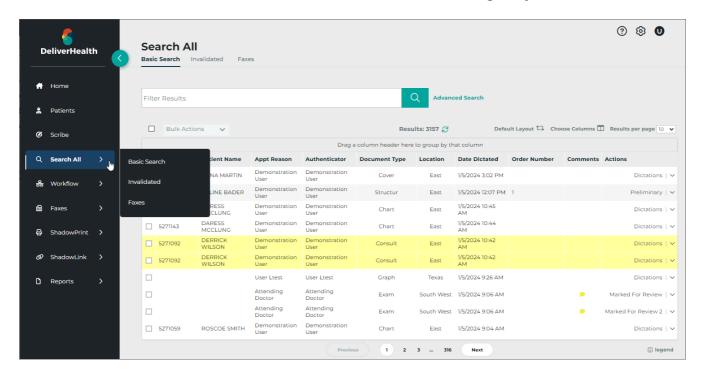
It is important that the provider unmute their microphone prior to beginning the patient interaction to ensure the scribe does not miss important details.

Once all participants have entered the scribe room the provider can unmute their microphone and proceed with the patient appointment as normal. The scribe will create the medical documentation in real-time.

Click to leave the scribe room. Each participant must leave the call to fully close the scribe room. Participants can rejoin the call in the same manner they originally joined.

7 Search All

The Search All tab allows users to search for transcriptions 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 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. The label of the Search All folder can be changed by the client.



There are three sub-tabs in the Search All folder. Hover the mouse over the Search All tab to expand the list of sub-tabs.

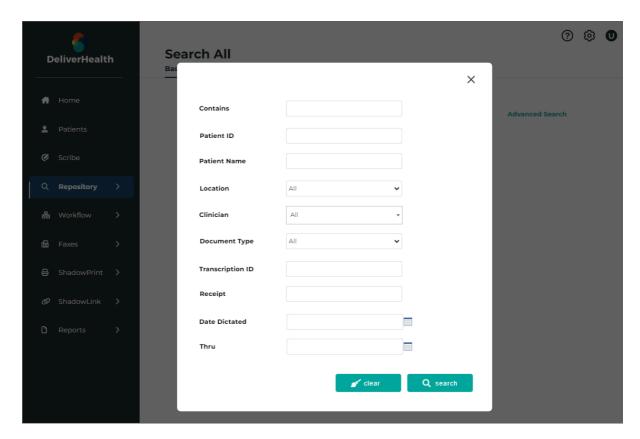
- Basic Search: Search for transcriptions in any stage of the workflow or Search All repository.
- **Invalidated:** Search for transcriptions that have been removed from the workflow or "deleted." By default, users do not have access to this sub-tab.
- Faxes: Opens the Manage Faxes tab. Search for and view the status of fax jobs, clear fax errors, and re-fax jobs. Manage Faxes can also be opened from the Faxes tab of the navigation menu.

Click the desired sub-tab to navigate to that page. After one of the sub-tabs is loaded the three Search All sub-tabs will appear at the top of the page to allow for easy navigation between searches.

7.1 Basic Search

Transcriptions currently in or completed through the workflow can be searched for in Basic Search. This is helpful when searching for a transcription without knowing the current workflow status.

Upon



opening Basic Search, the Advanced Search parameters window is presented. Data is not returned until a search is submitted. If the Advanced Search window is closed without submitting a search, the data grid will be empty. Click on Advanced Search to enter criteria and submit a search.

An Advanced Search must be submitted to further filter the search results. A search can be submitted without defining search criteria, but this will return all transcriptions the user has access to, which could result in a lengthy load time or a time-out. The Advanced Search is used to define criteria to ensure relevant transcriptions are returned in the data grid.

7.1.1 Building a Search

All fields in the Advanced Search window are optional and all fields, except for "Contains", will search specific data fields. Criteria entered in "Contains" will filter transcriptions returned by the other search criteria and will only match data in the fields displayed in the data grid. Fields can be added to and removed from the data grid before or after search results have been returned. See Data Grid for more details.

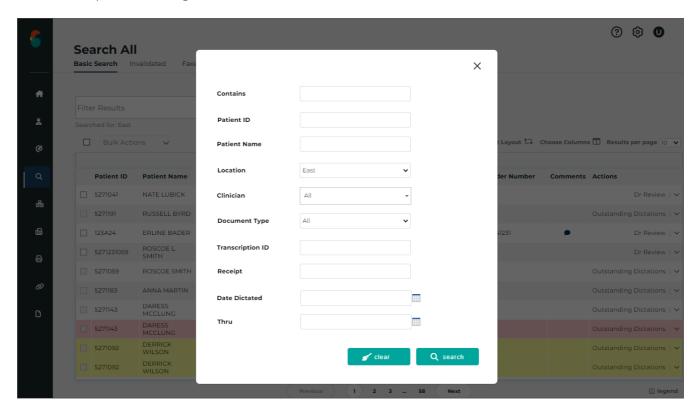
- **Contains** Filter by full or partial data to match in all or a specified field of the search results data grid; criteria entered here will also appear in the Search text box above the data grid and vice versa. See Filter Search Results below for additional details.
- Patient ID Search by the patient's full or partial MRN.
- **Patient Name** Search by the patient's first, last or full name. Partial and full matches will be returned.

- Location Select a location to filter on based on the visit location. Select All to search across all locations.
- **Clinician** Filter results based on the dictating clinician. To search for a clinician enter a sequence of characters in the search box. The more characters you enter, the more refined your search becomes. You can use alphanumeric and special characters, including spaces, apostrophes, and parentheses. Both first and last names are searched.
- **Document Type** Filter results based on the document type. Select "All" to include all document types or choose one document type to find jobs with only that document type.
- Transcription ID Search for a specific transcription with the full Transcription ID.
- Receipt Search for a transcription with the full Receipt Code.
- **Date Dictated** Enter a start date range to filter the search results based on the Date Dictated. Both date fields are optional and a start or end date can be submitted without the other.

Click **clear** to remove all advanced search criteria, or **search** to run the query.

Search criteria submitted in Advanced Search will be displayed under the Filter Results box as a reference.

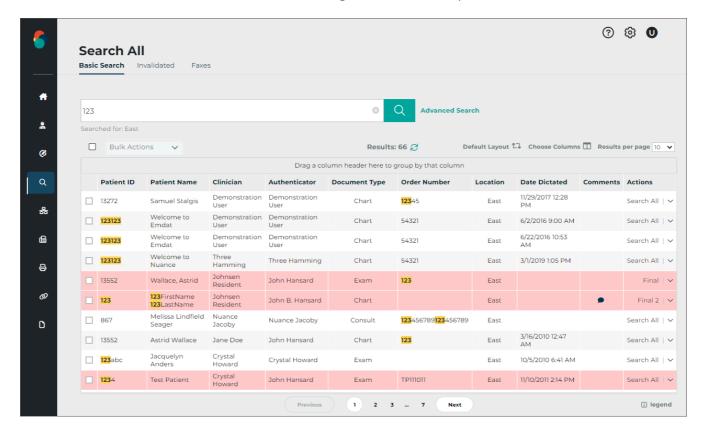
As an example, searching for the location "East" returned 575 records.



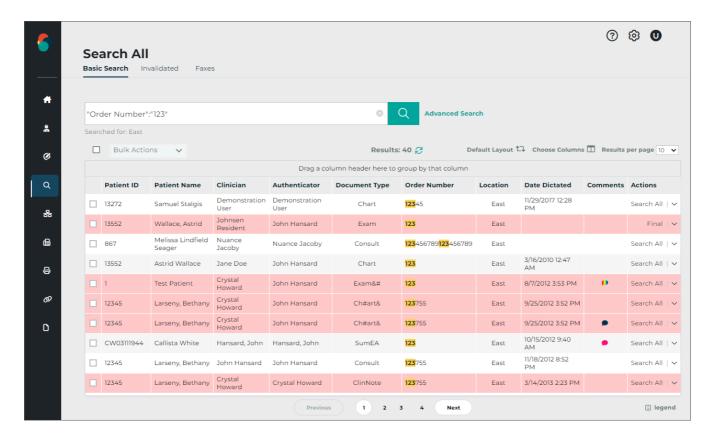
7.1.2 Filter Search Results

Once a search has been submitted and data is returned in the grid, a filter can be applied to further refine the results. Criteria entered in the Filter Results text box will be compared to results in the data grid. Any partial or full matches will remain in the data grid and non-matches will be filtered out. If the filter matches a data field on the transcription but is not displayed in the grid, the transcription will be filtered out and removed from the data grid.

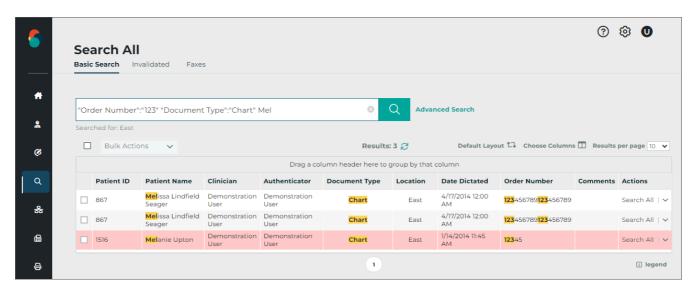
To filter across all data fields in the grid, enter the criteria in the filter box. Continuing the example from **Building a Search**, filtering for "123" returns 66 records with "123" in multiple data fields. The Order Number column has been added to the grid for this example.



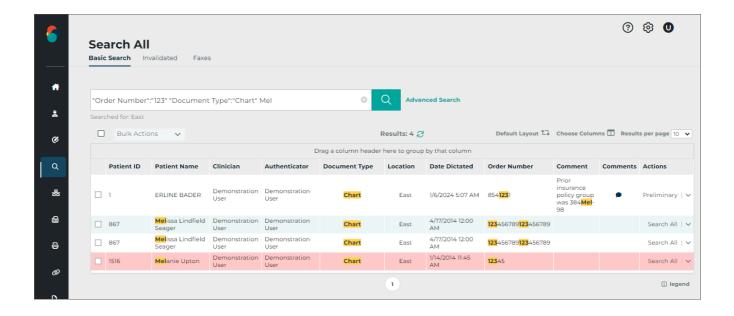
To restrict the filter to a particular data field, call out the field name in quotes, followed by a colon, then the data in quotes. The field name must match the header in the data grid. For example, to find records with "123" in the Order Number only, enter "Order Number": "123". Now the results have been filtered down to 40 records.



Multiple filters can be applied by separating the data with a space. All filter criteria must be met. For example, filtering the original search results for "123" in the Order Number, a Document Type of "Chart", and "Mel" in any of the fields in the grid returns 3 results. Note: The Document Type search in Advanced Search could have been used instead of the Document Type filter.

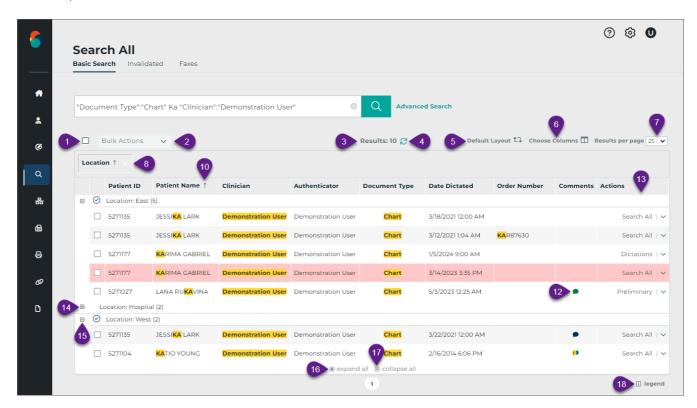


When an additional field is added to the grid, the filters take that field into consideration. For example, the Comment field is added to the grid. "Mel" was found in the comments for a new transcription, which has now been added to the data grid.



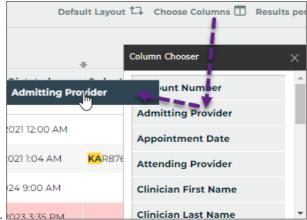
7.1.3 Data Grid

The data grid displays transcriptions that match the search criteria and can be customized by changing the included fields, grouping, sorting, and how many results are displayed on each page. Actions can be taken for individual transcriptions or in bulk by selecting multiple or all transcriptions.



- 1. **Filter Results** Allows filters to be applied to data in the grid. Columns with the matching data must be in the grid to match the filter. See Filter Search Results for more details.
- 2. **Advanced Search** Opens the Advanced Search window to specify search criteria. See Building a Search for more details.

- 3. Select All Toggles between selecting and unselecting all transcriptions on the current page of the search results. Transcriptions on prior and subsequent pages are not selected. Transcriptions with "Dictations" status will not be selected with this option because bulk actions cannot be applied to dictations not yet typed.
- 4. **Bulk Actions** Choose an action to apply to selected transcriptions. See Basic Search Actions for more information.
- 5. **Results** Displays a count of matching appointment records.
- 6. Refresh The refresh button performs the same search again.
- 7. **Default Layout** Resets the data grid to the default layout, removing any changes previously made to the included columns, grouping, and sorting.
- 8. **Choose Columns** Opens the Column Chooser. Drag columns from the chooser to the desired location in the grid to add a new column. Drag a column from the grid to the Column



Chooser to remove a column. 2023 3:35 PM

- 9. **Results per page** Choose how many appointment records to return per grid page.
- 10. **Group** Drag any column header from the grid or Choose Columns window to the grouping row to group the results based on that data criteria. For example, drag Location to the grouping row to group all appointments at the same location together. Multiple groups can be added. Groups will automatically be used to sort the data. Click the group column to toggle between ascending and descending order.
- 11. **Reorder** Drag and drop columns to reorder grid columns.



- 12. **Sort** Click any column header to sort results by data in that column. Click the column header again to toggle between ascending and descending order. The sort order will be identified by an up arrow (ascending) or down arrow (descending). To sort by multiple columns hold the Shift key while clicking the column headers; data is sorted by the first column added to the sort, then by the second column added, and so on. To remove the sort from a column hold the Ctrl key while clicking the column header.
- 13. **Remove Column** Hover the mouse pointer over the column header and click X, or drag the column into the Choose Columns window to remove it from the grid.

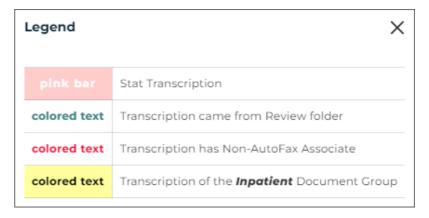


- 14. **Comments** Open the transcription comment window to view, edit, or remove comments and comment tags. See Comments for more information.
- 15. **Actions** The Actions column displays the status of the transcription and allows actions to be taken. If the transcription is in the workflow, the name of the folder will be displayed; if the transcription has completed the workflow, "Search All" will be displayed. Click ✓ to view additional actions that can be taken. See Basic Search Actions for more information.
- 16. **Expand Group** Click + at the head of a collapsed group to display all records within the group.
- 17. **Collapse Group** Click at the head of an expanded group to hide all records within the group.
- 18. Expand all Click to display all records for all groups.
- 19. Collapse all Click to hide records for all groups.
- 20. **Legend** Opens the legend for color-coded transcriptions. See Legend for more information.



7.1.4 Legend

The background and/or text color of each transcription line item in the search results may indicate a specific group or priority status of the transcription. To open the legend for these color codes, click on legend in the bottom right corner under the search results. Some color indicators, such as Non-AutoFax Associate and transcriptions coming



from the Review folder, will not apply in the Search All folder, but will apply in the workflow folders. Colors and document groups can be customized per client and may not match what is shown here.

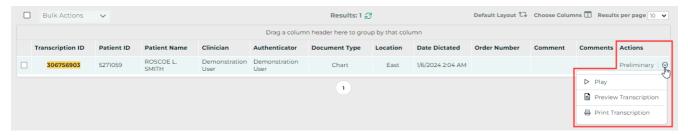
7.1.5 Comments

If a transcription has a comment and/or comment tag(s) an icon will appear in the Comments column. Click icon to open the transcription comment window where the comments and comment tags can be viewed, edited or deleted. There are three different types of comment icons to indicate the type/number of comments on the transcription:

- A black-filled comment icon indicates a typed comment has been added to the transcription.
- A color-filled comment icon indicates a comment tag (a predefined comment) has been added to the transcription and a text comment may also be included. A different color can be assigned to each comment tag; if only one comment tag appears on the transcription then the color assigned to that comment tag will fill the comment icon.
- 1 A rainbow-filled comment icon indicates multiple comment tags have been added to the transcription and a text comment may also be included.

7.1.6 Basic Search Actions

By default, clicking a transcription from the Basic Search data grid will open the Transcription Viewer. Depending on user settings, additional actions can be selected from the Transcription Viewer button ribbon.

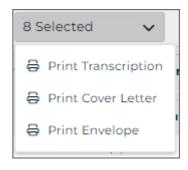


The Actions column in the Basic Search data grid displays the status of the transcription and allows actions to be taken. If the transcription is in the workflow, the name of the folder will be displayed; if the transcription is in multiple folders, such as Marked for Review and Review 2, it will appear in the grid twice (once for each folder). If the transcription has completed the workflow, "Search All" will be displayed.

The Actions column also provides a selection of actions to perform for the given transcription. Available actions vary based on user access and the status of the transcription. From Search All, actions may include playing the dictation, edit, print, fax, and complete the transcription from the current workflow folder. Click \checkmark to view available actions for the given transcription.

The **Play** option opens the playback control to allow users to play/pause audio. Users can also play/pause the audio using the Ctrl+Space shortcut. Foot pedals that are capable of being configured to send specific keystrokes can be used to play/pause audio as well. Please refer to your foot pedal manufacturer's user manual for assistance in configuring the Ctrl+Space shortcut. Dictations are stored on the eSOne system for 90-days and cannot be played after that time. The Play option will not appear when the dictation is not available.

Printing transcriptions, cover letters and envelopes for multiple transcriptions at once can be achieved by selecting the desired transcriptions with the check box at the beginning of each row, or the select-all box above the grid, then clicking the appropriate print option in the bulk action menu. Specific dictators or document types may not generate envelopes or cover letters.





A separate printing component is required to print transcriptions. The user will be prompted to download it if it is not found when printing is initiated. See the Printing Agent User Guide.

7.2 Invalidated

The Invalidated tab gives access to transcriptions that have been invalidated or removed. There are several reasons a transcription could be invalidated. If a dictation remains untyped for an extended period of time it may be automatically invalidated. Some clinicians may mistakenly dictate on the same appointment twice, asking that one be invalidated. Regardless of the reason, invalidated transcriptions can be searched for and restored from the Invalidated tab.

The search and data grid performs the same as Search All - Basic Search. See Basic Search for details on how to build a search. Search results will be displayed in the data grid.

7.2.1 Invalidated Actions

The Actions column of the data grid will display one of two statuses:

- **Transcription** Prior to being invalidated, the transcription was completed by the transcription company.
- **Not Transcribed** The dictation was invalidated prior to the transcription being delivered by the transcription company.

7.3 Faxes

Facsimiles are generated through Fax on Demand or by utilizing the eSOne AutoFax or Distribution Rules features. There are search tabs in Faxes, **Manage Faxes** and **Pending Faxes** to help manage fax jobs. See Faxes for additional details.

8 Workflow

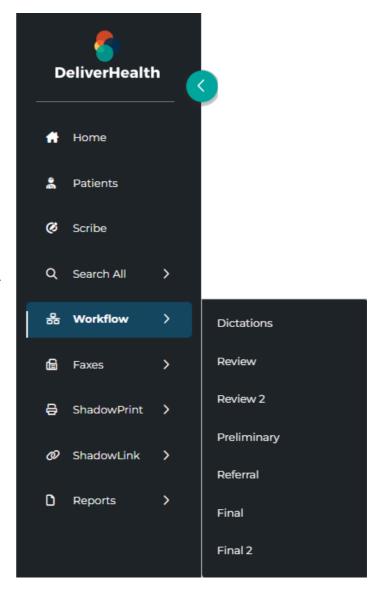


The contents of the Workflow tab are highly customizable and can be configured to the specific needs of the client. The workflow folders are listed in the order documents move through the workflow.

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 or the user does not have access to cannot be opened and are grayout in the Workflow Summary. The names of the workflow folders can be renamed by the client administrator, but their function and place in the workflow will remain unchanged.

Each workflow folder has a specific purpose. An example of the typical workflow and folder usage is:

- Dictations The dictation is going through the document creation workflow and is not yet available for review.
- Review Both review folders are typically used by administrative staff to make edits or answer outstanding questions prior to review by the provider..
- 3. Preliminary The medical provider reviews, edits, and signs transcriptions.
- 4. Final Used by administrative staff to print, fax, and distribute the transcriptions.

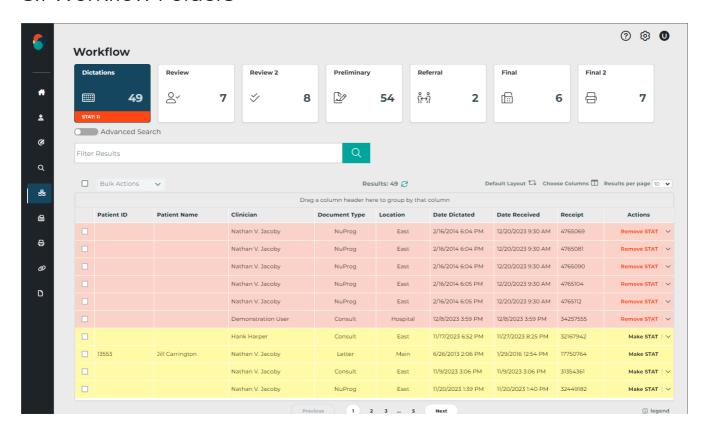


Each accessible folder can be opened from the Workflow Summary on the Home tab and along the top of each workflow folder, or by choosing it from the Workflow menu in the left-side navigation menu. All transcriptions in the given folder will automatically load in the data grid. Additional filters can be applied to further refine the data. See Refining Workflow Folder Lists for more details.

The default action in all workflow folders, except for Dictations, is **Edit**. A transcription will open in edit mode when clicked anywhere in the row, except for the Actions column. See Transcription Editor for details on editing transcriptions.

To view a transcription click **View Transcription** in the Actions column for the given transcription. Additional actions can be selected from the Actions menu. An action can be applied to multiple selected transcriptions using Bulk Actions. See Workflow Actions for more details on available actions.

8.1 Workflow Folders



8.1.1 Dictation Status

Transcriptions in the Dictation Status folder have recently been uploaded to the transcription company and have not been delivered as completed documents. Two actions can be performed on dictations that are in the Dictation Status workflow folder.

• Toggle STAT Status

A Transcription can be marked as a higher priority dictation. Transcriptions marked STAT are

completed before other transcriptions and may have a higher cost per line. The STAT status can be toggled with "Make STAT" and "Remove STAT" in the Actions column.

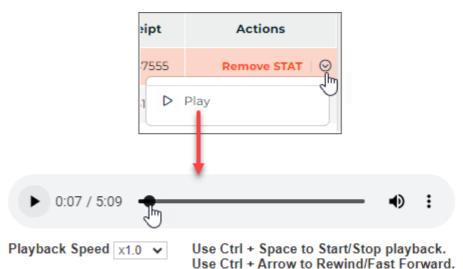
Transcriptions that are highlighted in pink have

Request STAT Transcription - TID: 305423598 Changing a dictation to a STAT may increase the price for this transcription. Please contact your transcription company for more information. Cancel Request STAT

been marked STAT (the color is customizable by the client and will be reflected in workflow folder legend).

Play Dictation

Expand the Actions menu and select "Play" to open and listen to the dictation in a new web-browser tab. Playback buttons and keyboard shortcuts are available for play, pause, rewind, and fast forward. Foot pedals that are capable of being configured to send specific keystrokes can be used for playback controls as well. Please refer to your



foot pedal manufacturer's user manual for assistance in configuring shortcuts. Dictations are stored on the eSOne system for 90-days and cannot be played after that time. The Play option will not appear when the dictation is not available.

8.1.2 Marked for Review

Transcriptions in the Marked for Review and Marked for Review 2 folders have been typed by the transcription company but may require additional edits from staff members. Comments are commonly added by the transcription company detailing why the document was selected for the Marked for Review folder. Access to view comments must be granted to InQuiry users and is disabled by default. Transcriptions printed from the Marked for Review folders include a "Preliminary" watermark by default.

8.1.3 Preliminary

Transcriptions in the Preliminary folder have been typed by the transcription company and are ready for provider review. If the provider is using the electronic signature option, completing documents from the Preliminary folder applies the electronic signature to the document. If multiple signatures are required, such as a resident and attending physician (authenticator), the signatures must be applied in order. The transcription will not appear in the Preliminary folder for the authenticator until after the resident has reviewed and signed the document.

The Preliminary folder is the last folder in the workflow that users can edit transcriptions without additional security access. Transcriptions in the Preliminary folder print with a "Preliminary" watermark by default.

8.1.3.1 Dual Resident/Attending

If the 'Dual Resident/Attending Workflow' option has been enabled for the client, attending physicians (authenticators) will be allowed to complete documents in the workflow even if the dictating resident has not yet reviewed or approved the document. A transcription requiring an extra signature(s) will appear in the resident's and attending's Preliminary folders at the same time. Either the dictating resident or attending physician can review and edit the document.



Note

The attending physician should not have proxy to the resident dictator when this workflow is enabled.

When the Dual Resident/Attending workflow is enabled, a new column named 'Review Status' will appear in the Preliminary workflow grid showing one of two statuses:

- **Outstanding** the transcription has not been completed from the Preliminary folder by the dictating resident or attending. The text color of this status can be changed using the new 'Dual Resident/Attending Color' option in Workflow Settings.
- **Reviewed** the transcription has been approved by the dictating resident from the Preliminary folder. Or, in the case of multiple authenticators, one of the authenticators has completed the dictation. (This status will not show for the resident.)

Only jobs requiring more than one signature will display a value in the 'Review Status' column.

There are two paths this workflow can follow:

Resident reviews then attending completes.

• When the transcription is 'Outstanding', the resident can review and approve the transcription. After the resident completes the job, it is removed from their Preliminary folder.

• The attending will still see the transcription in their Preliminary folder with the status of 'Reviewed'. The attending can then complete the transcription and it will move on to the next workflow folder.

· Attending completes an outstanding note.

- An attending can complete an 'Outstanding' transcription prior to the resident reviewing/approving the transcription.
- Once the attending completes the job, the transcription moves on in the workflow and out of their Preliminary folder and the resident's Preliminary folder.

If there is more than one attending on the dictation and the dictation has a status of 'Outstanding', the resident and all attendings can see the job in their Preliminary folders. Attendings can sign in any order.

If there is more than one attending on the dictation, and one of the attendings completes the dictation before the resident reviews it, the job is removed from that attending's Preliminary folder, as well as the resident's folder. The dictation will remain in the Preliminary folder for the other attendings with a status of 'Reviewed'.

8.1.4 Referral

The Referral folder contains transcriptions the provider has been copied on as a referring associate.

The Actions column will display one of two statuses:

- **preliminary** The transcription has not been completed from the dictating provider's Preliminary folder; changes could be made to the transcription prior to being finalized.
- transcription The transcription has been completed from the provider's Preliminary folder.

Transcriptions can be read, printed, and completed from the Referral folder, but not edited. Transcriptions printed from the Referral folder while still in the dictating provider's Preliminary folder will print with a "Preliminary" watermark by default. Those that have been completed from Preliminary will not have a watermark. Completing transcriptions from Referral will not advance them in the dictating provider's workflow, but will remove them from the Referral folder.

8.1.5 Final

Transcriptions in the Final folders have been authenticated by the provider. Transcriptions are prepared to be printed for the chart, paper record, or to be sent to referring associates who receive their copies by mail. Transcriptions in the Final folders print without a watermark by default.

After transcriptions are completed from the last workflow folder they will only be found in the Repository (Search All).

8.2 Refining Workflow Folder Lists

When a workflow folder is opened, an initial auto-search runs to return all notes in the given folder. The **Filter Results** box or **Advanced Search** can be used to refine the list of transcriptions or find a specific transcription in the data grid. The results will highlighted in yellow in the grid. However, the Date Dictated column will not include highlighting for filter matches.

Use **Advanced Search** to choose specific data fields to search, or the **Filter Results** text box to filter across all data fields or a specific field.

8.2.1 Advanced Search



Click the **Advanced Search** slider to toggle the Advanced Search panel on and off. Advanced Search is off by default. The Advanced Search panel can be toggled off after submitting search criteria without losing the selected search data.

All fields in the Advanced Search panel are optional and will search only the transcriptions in the given workflow folder.

- **Contains** Filter by full or partial data to match in all or a specified field of the transcriptions in the workflow folder; criteria entered here will also appear in the Filter Results text box above the data grid. See Filter Results below for additional details.
- Patient ID Filter by the patient's full or partial MRN.
- **Patient Name** Filter by the patient's first, last or full name. Partial and full matches will be returned.
- **Clinician** Filter results based on the dictating clinician. To search for a clinician in the list, enter a sequence of characters in the search box. The more characters you enter, the more refined your search becomes. You can use alphanumeric and special characters, including spaces, apostrophes, and parentheses. Both first and last names are searched.
- **Location** Select a location to filter on based on the visit location. Only locations assigned to transcriptions currently in the workflow folder will appear in the selection list. Select "All" to include all locations in the folder.
- **Document Type** Select a document type to return transcriptions with that document type. Only document types assigned to transcriptions currently in the workflow folder will appear in the selection list. Select "All" to include all document types in the folder.

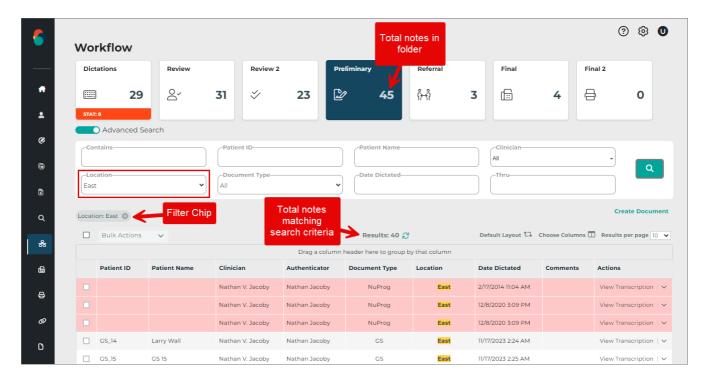
• **Date Dictated** - Enter a date range to filter transcriptions based on the Date Dictated. Both date fields are optional and a start or end date can be submitted without the other, making the range open ended.



Criteria entered in "Contains" will search within all data fields, regardless if they are displayed in the data grid. Please note that this behavior is different in the Search All tabs. An advanced search is required and only columns in the data grid will be searched for matches in Search All.

The Advanced Search criteria will be copied to the Filter Results text box (visible when Advanced Search is toggled off). A **filter chip** will also appear for each criterion. To remove a single filter, click the X next to the criterion; the search results and Advanced Search panel will be updated accordingly. Click **Clear all** to remove all search criteria; all notes in the folder will be displayed in the data grid.

In the example below, the Preliminary folder has 45 notes awaiting approval. Searching for the location "East" returned 40 records.

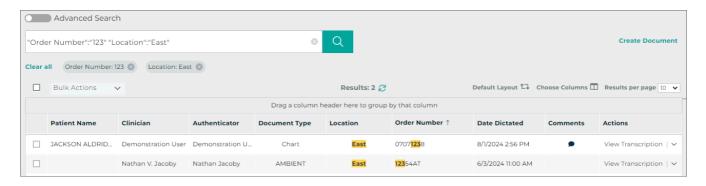


8.2.2 Filter Results

Filters can also be applied using the **Filter Results** text box, visible when Advanced Search is toggled off. Criteria entered in the Filter Results text box will be compared to data in any available field for the data grid, regardless if the field is in the grid or in the "Choose Columns" list. Any partial or full matches will remain in the data grid and non-matches will be filtered out.

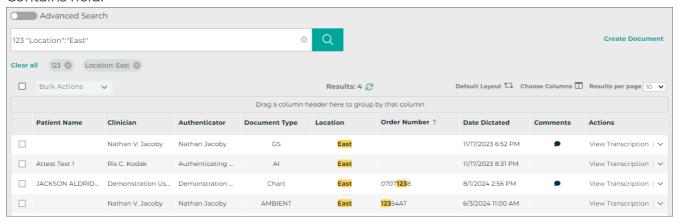
Continuing the example from **Advanced Search** above, the location filter has automatically been copied from the Advanced Search to the Filter Results box. Because the filter was applied to search within a specific data field, Location, it is formatted in the Filter Results box to indicate the field being searched and the data being searched for. The same format used for the Location filter can be applied to any other field and will only look for matches in that particular field. Call out the field name in quotes, followed by a colon, then the data in quotes. The field name must match the header in the data grid.

For example, to find records with "123" in the Order Number field, enter "Order Number": "123". The results filtered down to 2 records.



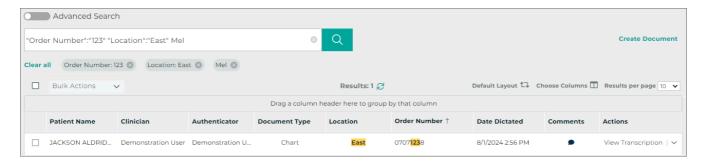
Note that the Order Number column was added to the grid for visual purposes, but the same two results would still be returned if the Order Number column was not in the data grid.

To filter across all data fields in the grid, enter the criteria in the Filter Results box (or the Contains field in Advanced Search) without the field formatting. Removing the Order Number filter and adding "123" in the example returned 4 records with "123" in multiple data fields and "East" for the location. Also note the Order Number filter can be removed by deleting it from the Filter Results box, deleting the filter chip, or toggling on Advanced Search and deleting the filter from the Contains field.

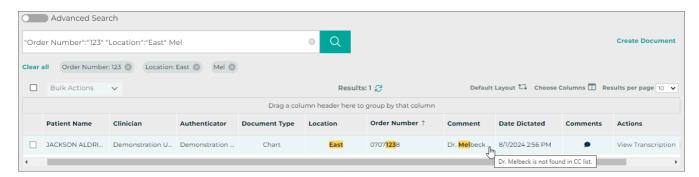


Filters in the workflow folders apply to all columns available for the data grid, which includes fields in the data grid and fields in the "Choose Columns" list. In the example, the first two results do not have "123" highlighted in the grid. This means "123" is found in another field that is not in the grid. For these particular notes, "123" is found in the Comment and Receipt fields.

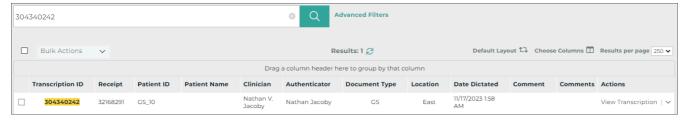
Multiple filters can be applied by separating the filters with a space. All criteria must be met. For example, filtering the workflow folder to the "East" Location, "123" in the Order Number, "Chart" Document Type, and "Mel" in any of the fields returned 1 result. The comment text contains "Mel", which is why the note was returned, even though the field was not in the grid.



When the "Comment" column is added, "Mel" is highlighted.

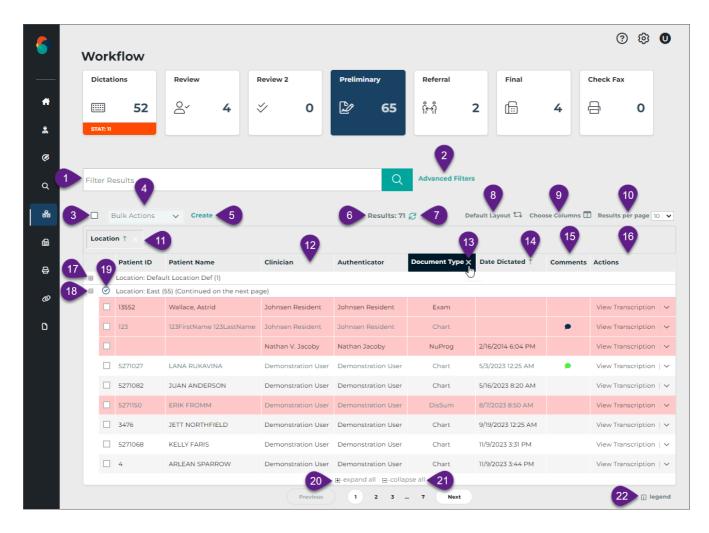


Transcriptions can easily be located by Transcription ID or Receipt Code by entering the data in the Filter Results or Contains filters, even without the TID and Receipt fields in the grid.



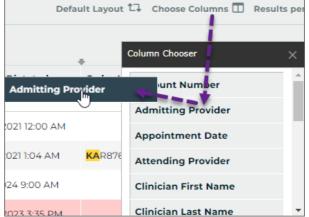
8.3 Data Grid

The data grid displays transcriptions that match the filter criteria and can be customized by changing the included fields, grouping, sorting, and how many results are displayed on each page. Actions can be taken for individual transcriptions or in bulk by selecting multiple or all transcriptions.



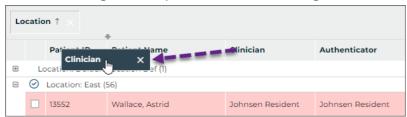
- 1. **Filter Results** Allows filters to be applied to the transcriptions in the folder. See Filter Results for more details.
- 2. **Advanced Search** Opens the Advanced Search window to specify filter criteria. See Advanced Search for more details.
- 3. **Select All** Toggles between selecting and unselecting all transcriptions on the current page of the grid. Transcriptions on prior and subsequent pages are not selected. Transcriptions in the "Dictations" status will not be selected with this option because bulk actions cannot be applied to dictations not yet typed.
- 4. **Bulk Actions** Choose an action to apply to selected transcriptions. See Workflow Actions for more information.
- 5. **Create** Create a new transcription without a dictation. The transcription editor will open. This option is only available in the Preliminary folder and Patients tab if enabled for the client and user.
- 6. Results Displays a count of matching appointment records.
- 7. **Refresh** The refresh button performs a search for all jobs in the folder and re-applies any filters.
- 8. **Default Layout** Resets the data grid to the default layout, removing any changes previously made to the included columns, grouping, and sorting.

9. **Choose Columns** - Opens the Column Chooser. Drag columns from the chooser to the desired location in the grid to add a new column. Drag a column from the grid to the Column Chooser to remove a column. Filters will apply to all fields in the grid and in this list, unless a



specific field is called out in the filter. 1023 3:35 PM

- 10. Results per page Choose how many appointment records display per grid page.
- 11. **Group** Drag any column header from the grid or Choose Columns window to the grouping row to group the results based on that data criteria. For example, drag Location to the grouping row to group all appointments at the same location together. Multiple groups can be added. Groups will automatically be used to sort the data. Click the group column to toggle between ascending and descending order.
- 12. Reorder Drag and drop columns to reorder grid columns.



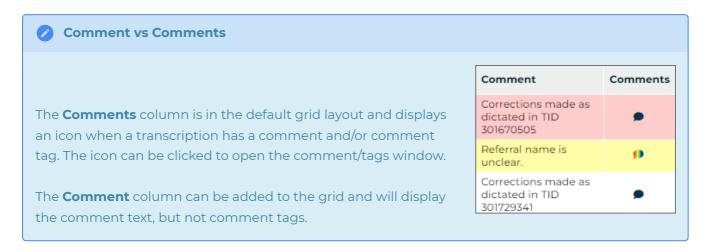
13. **Remove Column** - Hover the mouse pointer over the column header and click X, or drag the column into the Choose Columns window to remove it from the grid.



- 14. **Sort** Click any column header to sort results by data in that column. Click the column header again to toggle between ascending and descending order. The sort order will be identified by an up arrow (ascending) or down arrow (descending). To sort by multiple columns hold the Shift key while clicking the column headers; data is sorted by the first column added to the sort, then by the second column added, and so on. To remove the sort from a column hold the Ctrl key while clicking the column header.
- 15. **Comments** Open the transcription comment window to view, edit, or remove comments and comment tags. See Comments for more information.
- 16. **Actions** The Actions column displays the status of the transcription and allows actions to be taken. If the transcription is in the workflow, the name of the folder will be displayed; if the

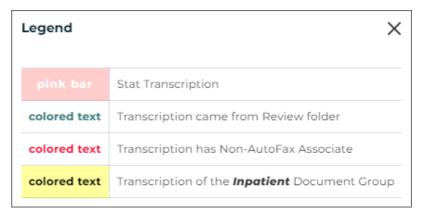
transcription has completed the workflow, "Search All" will be displayed. Click \checkmark to view additional actions that can be taken. See Workflow Actions for more information.

- 17. **Expand Group** Click + at the head of a collapsed group to display all records within the group.
- 18. **Collapse Group** Click at the head of an expanded group to hide all records within the group.
- 19. **Toggle Group Selection** Click to select/un-select all transcriptions in the group.
- 20. **Expand all** Click to display all records for all groups.
- 21. Collapse all Click to hide records for all groups.
- 22. **Legend** Opens the legend for color-coded transcriptions. See Legend for more information.



8.3.1 Legend

The background and/or text color of each transcription line item in the grid may indicate a specific group or priority status of the transcription. To open the legend for these color codes, click on legend in the bottom right corner under the grid. Some color indicators, such as Non-AutoFax Associate and transcriptions coming from the



Review folder, will not apply in the Search All folder, but will apply in the workflow folders. Colors and document groups can be customized per client and may not match what is shown here.

8.3.2 Comments

If a transcription has a comment and/or comment tag(s) an icon will appear in the Comments column. Click icon to open the transcription comment window where the comments and comment tags can be viewed, edited or deleted.

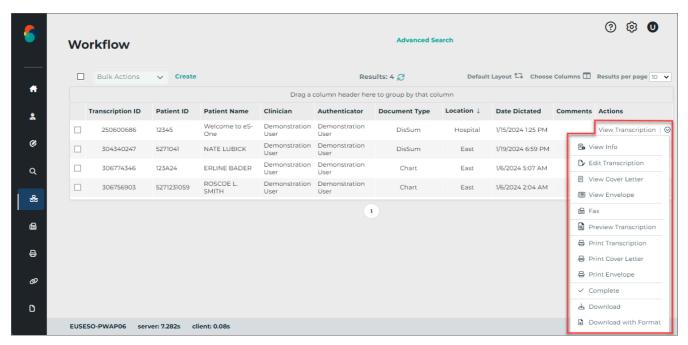
There are three different types of comment icons to indicate the type/number of comments on the transcription:

- A black-filled comment icon indicates a typed comment has been added to the transcription.
- A color-filled comment icon indicates a comment tag (a predefined comment) has been added to the transcription and a text comment may also be included. A different color can be assigned to each comment tag; if only one comment tag appears on the transcription then the color assigned to that comment tag will fill the comment icon.
- A rainbow-filled comment icon indicates multiple comment tags have been added to the transcription and a text comment may also be included.

8.4 Workflow Actions

The following workflow actions apply to all workflow folders except Dictations and Referral. See Dictation Status or Referral for available actions in the respective folders.

Many actions can be taken on transcriptions in the workflow. Many of these actions are available in the Transcription Viewer and Transcription Editor, but can also be accessed from the workflow folder. Some actions can only be accessed from the workflow folder.



The Actions column in the workflow folder data grid displays "View Transcription". Clicking on "View Transcription" will open the Transcription Viewer. Clicking anywhere else on the record will open the Transcription Editor.

The Actions column also provides a selection of actions to perform for the given transcription. Available actions vary based on user access and workflow folder. Click \checkmark to view available actions for the given transcription.

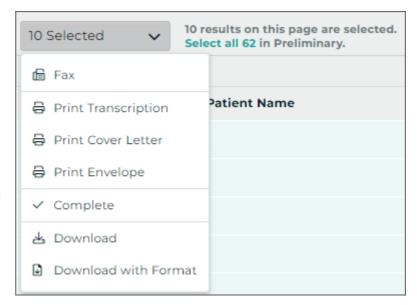
Action	Action Description	Action Location
View Transcription	View the transcription contents in a separate web-browser tab.	- Actions column
View Info	View additional transcription information.	- Actionsmenu- TranscriptionViewer
Edit Transcription	Edit the transcription text, demographics, referrals, signatures, and more.	- Click the grid row - Actions menu - Transcription Viewer
View Cover Letter	Opens a preview of the document cover letter(s). Cover letters are only generated for associates on the transcription who receive documents by mail. Specific dictators or document types may not generate cover letters.	- Actions menu
View Envelope	Opens a preview of the document envelope(s). Envelopes are only generated for associates on the transcription who receive documents by mail. Specific dictators or document types may not generate envelopes.	- Actions menu
Play	Opens the dictation playback control in a new web-browser window.	- Actionsmenu- TranscriptionViewer- TranscriptionEditor
Fax	Opens the Fax on Demand dialog window. When opened from Bulk Actions, all selected transcriptions will be faxed to the same	- Actions menu - Transcription Viewer

	assuciate.	- DUIK ACTIONS menu
Preview Transcription	Opens a rendered preview of the transcription in the InQuiry Printing Agent.	- Actionsmenu- TranscriptionViewer
Print Transcription	Prints the transcription from the InQuiry - Tran Printing Agent. Viewe - Bulk	
Print Cover Letter	Prints the cover letter and transcription from the InQuiry Printing Agent. Specific dictators or document types may not generate cover letters.	
Print Envelope	Prints the envelope from the InQuiry Printing Agent for the patient and/or associate. Specific dictators or document types may not generate envelopes.	- Actions menu - Bulk Actions menu
Complete	Completes the transcription from the current workflow folder and progresses to the next stage of the workflow or to the Search All repository.	- Actions menu - Bulk Actions menu - Transcription Viewer - Transcription Editor
Download	Downloads a PDF file of the transcription. This option is only available for transcriptions in the Preliminary folder.	- Actions menu - Bulk Actions menu - Transcription Viewer
		- Actions

		menu
Download	Opens the Select Format window to download	- Bulk Actions
with Format	the transcription in PDF or DOC format.	menu
		- View
		Transcription

8.4.1 Bulk Actions

Performing the same action for multiple transcriptions can be achieved by selecting the desired transcriptions with the check box at the beginning of each row, or the select-all box above the grid, then clicking the appropriate action from the bulk action menu. The select-all check-box above the grid will select all transcriptions on the current grid page. To select all transcriptions that meet the applied filter criteria, check the select-all check-box, then click the "Select all" link in the text next to the

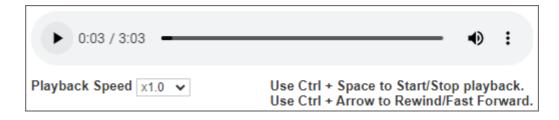


bulk action menu. Actions chosen from the bulk actions menu will apply to all selected transcriptions.

Transcriptions print in the order they appear in the grid when using bulk printing. To change the order in which transcriptions are printed, sort the table, then print.



8.4.2 Play Dictations

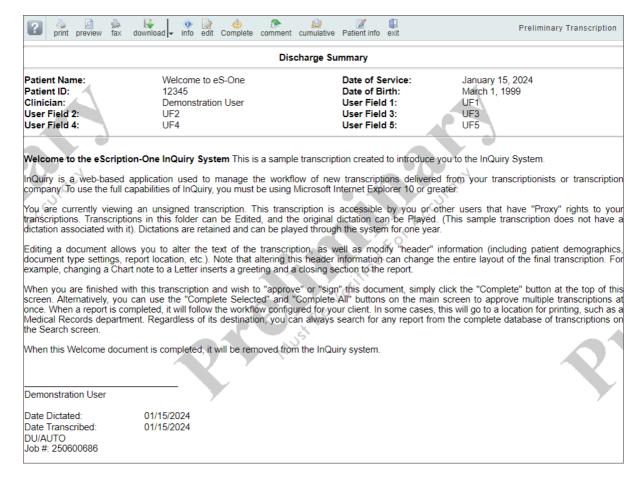


The **Play** option opens the playback control to allow users to play/pause audio. Users can also play/pause the audio using the Ctrl+Space shortcut. Foot pedals that are capable of being configured to send specific keystrokes can be used to play/pause audio as well. Please refer to your foot pedal manufacturer's user manual for assistance in configuring the Ctrl+Space shortcut. Dictations are stored on the eSOne system for 90-days and cannot be played after that time. The Play option will not appear when the dictation is not available.

9 Legacy Transcription Viewer

Note: This viewer (Legacy Transcription Viewer) is being replaced by the Note Viewer. Please see Note Viewer for the corresponding user guide.

The



Transcription Viewer is a preview of the typed document and is only available for transcriptions past the Dictations folder. Click "View Transcription" in the Actions column for a given transcription to open the viewer. In addition to providing a preview of the document, the top of the Transcription Viewer contains available actions. On the far right, the current workflow folder is displayed.

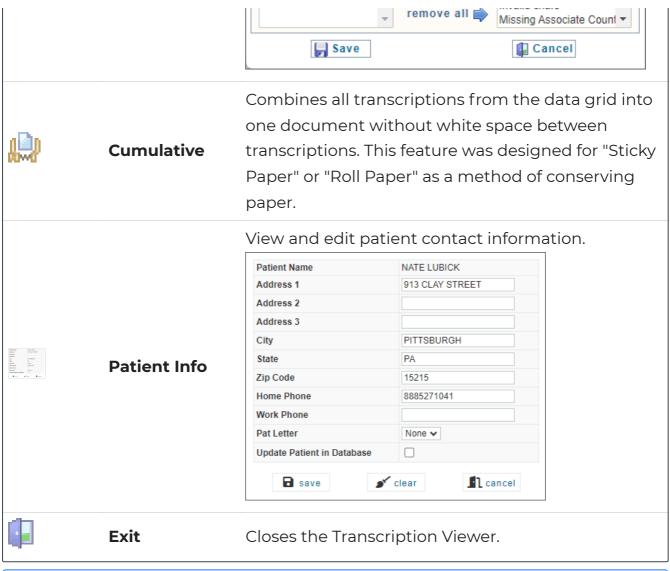
The Transcription viewer may display text based on the assigned print template for the transcription, such as the patient and appointment information with field labels at the top and the signature line with date stamps (after being signed), but does not always reflect how the printed document would appear. Use **Preview**, available from Transcription Viewer, to view a rendered PDF of the transcription.

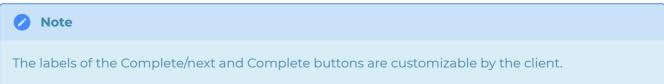
9.1 Transcription Viewer Actions

A ribbon menu along the top of the transcription viewer provides actions that can be taken. Available actions depend on the transcription workflow status, user permissions, and client setup. The actions presented in the transcription viewer for a given transcription may not include all of the below options.

?	Button Labels	Toggles the button labels on and off.
.	Print	Launches the eSOne Inquiry Printing Agent to print the transcription. See eSOne InQuiry Printing Agent for more details on printing from InQuiry.
Ø	Preview	Opens a rendered preview of the transcription in the eSOne InQuiry Printing Agent, displaying how the document will appear on paper after it is printed.
<u></u>	Fax	Opens the Fax on Demand dialog window.
-	Download	Downloads a rendered copy of the transcription in PDF format. Click to choose between Word and PDF formats. This button is only available for documents in the Preliminary. Select Format Please select format to download transcription in: PDF PDF DOC Ok Cancel
4	Previous	Opens the previous Transcription in the workflow folder data grid. This button is disabled if it is the first transcription.
⇒	Next	Advances to the next Transcription in the workflow folder data grid. This button is disabled if it is the last transcription.
•	Info	Includes details about the transcription, including demographics, version history, and the activity log. The transcription can be invalidated or returned to a previous stage in the workflow. The Info button is covered comprehensively in Transcription Information.
	Edit	Opens the transcription in edit mode to allow edits to the transcription text and patient/appointment demographics. Edit Mode is covered

comprehensively in Transcription Editor. Opens the dictation in a new web-browser tab. Playback buttons and keyboard shortcuts are available for play, pause, rewind, and fast forward. Foot pedals that are capable of being configured to send specific keystrokes can be used for playback controls as well. Please refer to your foot pedal manufacturer's user manual for assistance in configuring shortcuts. Dictations are stored on the **Play Dictation** eSOne system for 90-days and cannot be played after that time. The Play option will not appear when the dictation is not available. 0:07 / 5:09 Use Ctrl + Space to Start/Stop playback. Playback Speed x1.0 ✓ Use Ctrl + Arrow to Rewind/Fast Forward. Completes the transcription from the current workflow folder and opens the next transcription from the workflow folder data grid. If the Complete/Next transcription is in the Preliminary folder the electronic signature will be applied if that feature is being used. Completes the transcription from the current workflow folder and closes the transcription viewer. Complete If the transcription is in the Preliminary folder the electronic signature will be applied if that feature is being used. View and edit transcription comments and comment tags. Transcription #304340247 Comment Unknown associate. 🚟 Clear Note: double quotes, <, and > characters are not allowed Comment **Transcription Tags** Available Tags Acct # or Appt ID Missin add all Audio Not Played Blanks add Chart Nove remove [Invalid chars

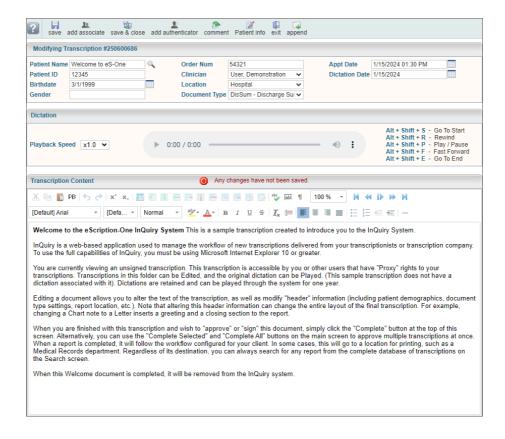




10 Legacy Transcription Editor

Note: This editor (Legacy Transcription Editor) is being replaced by the Note Editor. Please see Note Editor for the corresponding user guide.

Edits can be made to patient and appointment demographics, transcription text, referring associates, and authenticators in the transcription editor. By default, only documents that are in the Marked for Review and Preliminary Folders can be edited.



The transcription editor can be accessed in multiple ways:

· From the Workflow Folder

- Click anywhere on the transcription in the data grid, except for the Actions column.
- Expand the Actions list in the data grid and choose Edit Transcription.
- Click **View Transcription** in the Actions column to open the transcription viewer, then click **edit**.

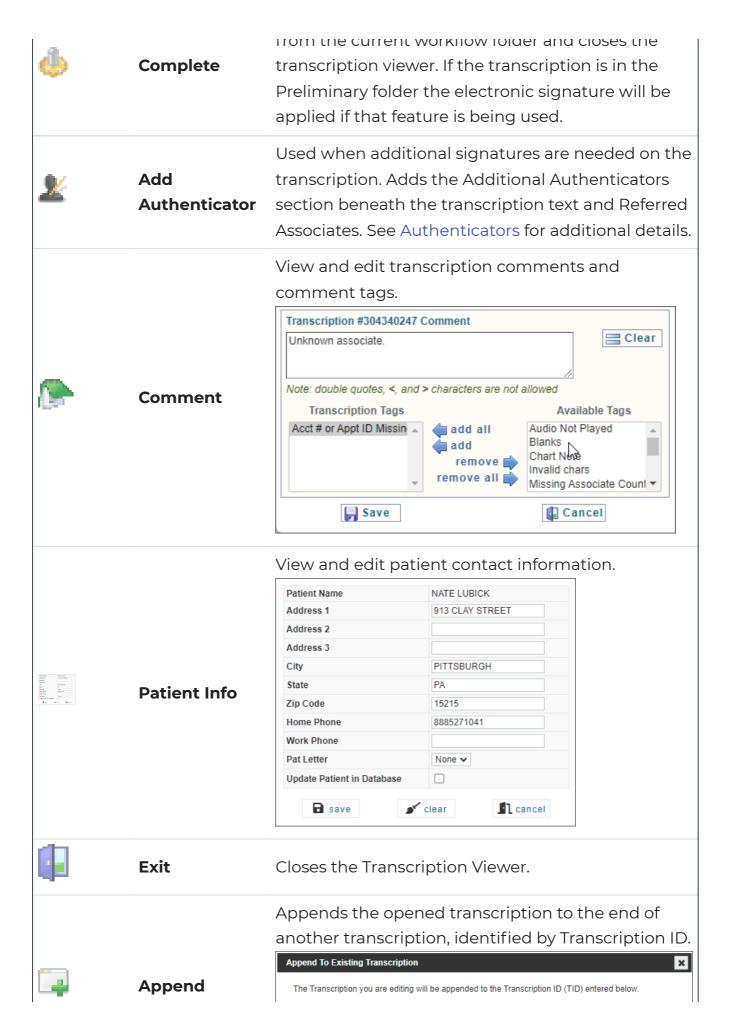
• From Search All - Basic Search

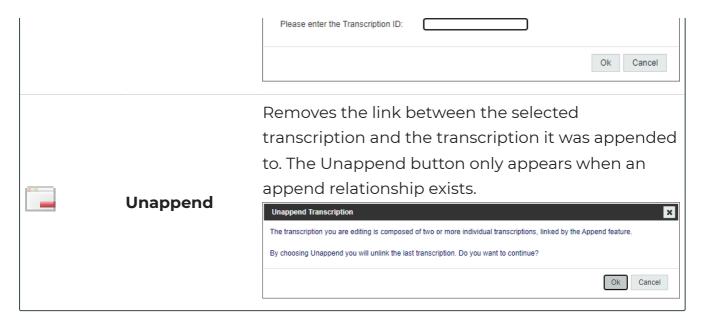
 Click anywhere on the transcription in the data grid to open the transcription viewer, then click edit.

10.1 Transcription Editor Actions

A ribbon menu along the top of the transcription editor provides actions that can be taken. Available actions depend on the transcription workflow status, user permissions, and client setup. The actions presented in the transcription viewer for a given transcription may not include all of the below options.

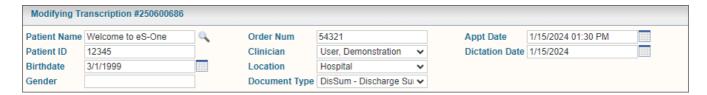
?	Button Labels	Toggles the button labels on and off.
	Save	Saves changes made to the demographics and transcription text and keeps the transcription editor open. If the editor window is closed without saving, changes will be lost.
20	Add Associate	Adds an additional section beneath the Editor window where Referred Associates can be to search for or manually add referred Associates. See Associates for more details.
Q	Save & Close	Saves changes made to the demographics and transcription text, closes the editor window, and returns to the Transcription Viewer.
O	Play Dictation	Opens the dictation in a new web-browser tab. Playback buttons and keyboard shortcuts are available for play, pause, rewind, and fast forward. Foot pedals that are capable of being configured to send specific keystrokes can be used for playback controls as well. Please refer to your foot pedal manufacturer's user manual for assistance in configuring shortcuts. Dictations are stored on the eSOne system for 90-days and cannot be played after that time. The Play option will not appear when the dictation is not available. Playback Speed x1.0 V Use Ctrl + Space to Start/Stop playback. Use Ctrl + Arrow to Rewind/Fast Forward.
4	Complete/Next	Saves changes and completes the transcription from the current workflow folder and opens the next transcription from the workflow folder data grid. If the transcription is in the Preliminary folder the electronic signature will be applied if that feature is being used.
		Saves changes and completes the transcription





10.2 Demographics

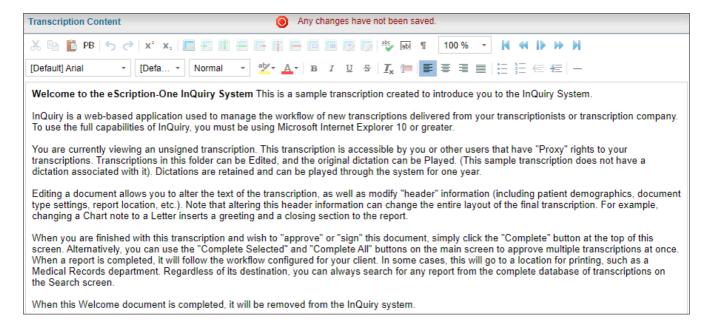
Demographics include patient information, as well as health care provider and appointment information. The layout and data fields in the demographics are customizable by the client, as well as which fields are editable or read-only. Users can search the patient database by using the magnifying glass button next to the Patient Name field. The patient search criteria can be customized by the client. The following are the default demographic fields available in the Transcription Editor:



- Patient Information: Includes Patient Name, Patient ID, Birthdate, and Gender.
- Order Number: The order number or appointment identifier.
- Clinician: The provider who dictated the transcription.
- **Location:** Depending on client setup, this could be the location of the appointment or the department within the facility.
- **Document Type:** Indicates which work type of the transcription. Document types can be formatted differently.
- Appt Date: The date and time of the appointment.
- **Dictation Date:** The date the clinician dictated the transcription.

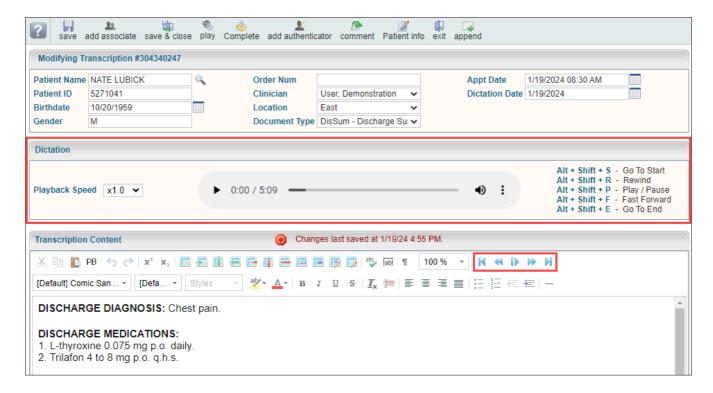
10.3 Transcription Text Editor

The Editor Window allows changes to be made to the body of the document. The tools in the toolbar allow users to create and modify tables, change font and size, add lists, run the spell check, and more.



10.4 In-Editor Audio Control

InQuiry supports an in-editor audio control. With this option, users can control audio while editing a transcribed document. This setting is turned off by default and must be enabled by an administrator.



Once enabled, the audio control will be present within the edit transcription screen and additional playback controls will appear in the editor toolbar. The playback control may display differently depending on the browser used.

Use the control to adjust the playback speed, play/pause the audio, and move forward and backwards in the audio.

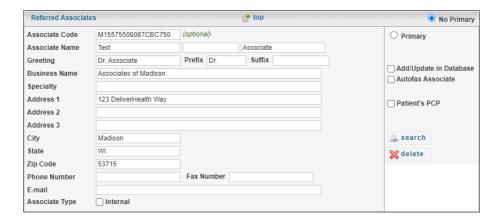
The following keyboard shortcuts are available:

- ALT + Shift + S Go To Start
- ALT + Shift + R Rewind
- ALT + Shift + P Play/Pause
- ALT + Shift + F Fast Forward
- ALT + Shift + E Go To Fnd

Foot pedals that are capable of being configured to send specific keystrokes can also be used to control audio while simultaneously editing. Please refer to your foot pedal manufacturer's user manual for assistance in configuring the shortcuts.

10.5 Associates

Referred Associates are people or organizations who receive 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 on the left panel. Multiple associates can be added to one transcription.

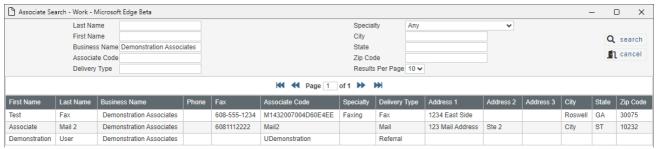


On the right panel are check boxes that affect how the associate is handled in the associate database and workflow.

• **Primary** radio 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 carbon copied. Only one associate can be designated the primary associate.

Additionally, if no primary associate is needed, there is a radio 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.
- Autofax Associate: This check box indicates that a fax will automatically be generated for this
 associate for this transcription. If both Add/Update in Database and Autofax Associate are
 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 PCP 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 Associates Database for existing associate records to add to the transcription. Click a record from the search results to add the associate to the transcription.



• **Delete:** The Delete button removes the Associate from the transcription.

10.6 Additional Authenticators

Additional Authenticators are providers, other than the dictator, who need to review and sign the transcription, such as attendings signing residents' transcriptions. This workflow is typically used in a teaching clinic or hospital setting in which the attendings must attest to the residents' transcription accuracy.



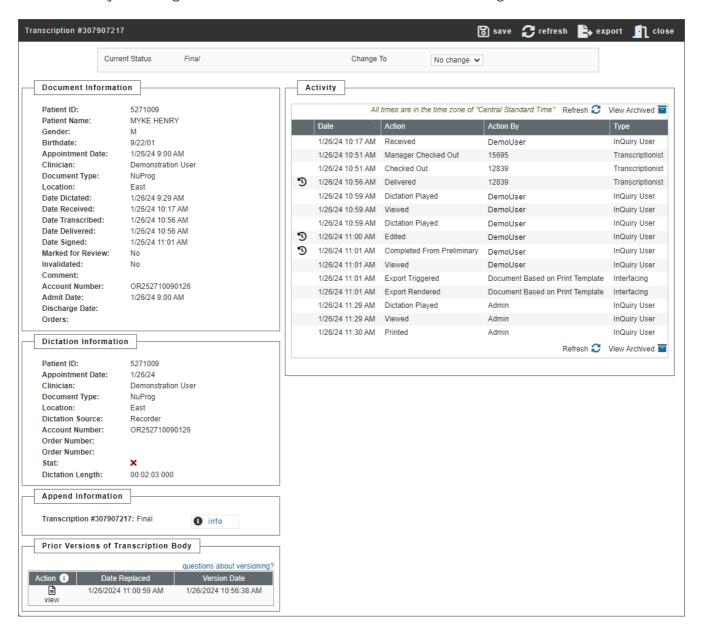
Multiple authenticators can be added to one transcription by pressing the Add Authenticator button for each authenticator. The signing order is displayed but cannot be edited so the authenticators will need to be added in the order in which they need to sign the document, with the first added authenticator signing after the dictator has approved the transcription and the last added authenticator to sign last. Pressing the Delete button will remove the last authenticator.

11 Legacy Transcription Information

Note: This Transcription Information page (Legacy Transcription Information) is being replaced by Note Info. Please see Note Info for the corresponding user guide.

Transcription Information contains details pertinent to the transcription. It also allows users with access rights to move a transcription back to a previous stage in the workflow or to invalidate unwanted transcriptions.

Transcription information can be opened from the transcription viewer by using the **1** Info button and by selecting **1** View Info from the Actions menu in the data grid.



11.1 Refresh, Export and Close

These buttons are available at the top right corner of the Transcription Information window.

- Save will save changes to the status of the transcription. This button only appears after a change has been made.
- Refresh will reload the transcription data.
- Export will allow the user to manually export the transcription if it meets the criteria of the selected export rule or exclude the transcription from being exported after it has met the export rule criteria.
- Close will close the Transcription Information without making changes.

11.2 Current Status

The Current status of the Transcription is displayed at the top of 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 list that has up to four selections: No Change, Review, Preliminary, and Invalidated. After changing the status, an optional Comment box will appear. The comment can be used to explain why the status was changed. Choose the save option in the upper right to finalize the selection.

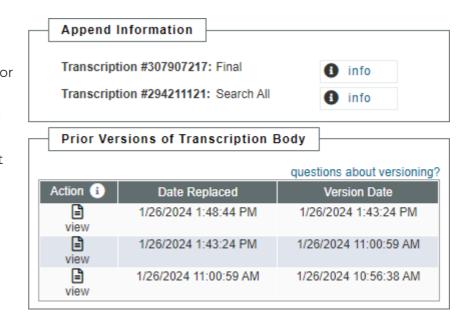


- No Change: The transcription maintains its current status in the workflow.
- **Review:** When a user chooses this option, the selected transcription is returned to the Marked for Review or Marked for Review 2 folders. Typically, only dictating users have access to this selection and use it to return a document to the review folder for additional staff editing.
- **Preliminary:** The transcription is moved to the Preliminary folder. Depending on the client's settings, any signatures previously applied may be removed so exports can be re-triggered when the transcription is completed from the Preliminary folder again.
- 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.



11.3 Append and Prior Versions

The Append section gives information on which, if any, transcription IDs are appended or prepended 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 opens the Transcription Information window for that transcription. The current transcription will always appear in the Append Information, even if it is not appended to another 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 a new tab. A restore button is available in the upper right corner to revert back the prior version. By default, users do not have access to prior versions or restore functionality.

11.4 Activity Log

		All times are in the time zone of	"Central Standard Time" Refresh 🧲	View Archived
	Date	Action	Action By	Туре
	1/26/24 10:17 AM	Received	Admin	InQuiry User
	1/26/24 10:51 AM	Manager Checked Out	15695	Transcriptionist
	1/26/24 10:51 AM	Checked Out	12839	Transcriptionist
I	1/26/24 10:56 AM	Delivered	12839	Transcriptionist
	1/26/24 10:59 AM	Dictation Played	Admin	InQuiry User
	1/26/24 10:59 AM	Viewed	Admin	InQuiry User
	1/26/24 10:59 AM	Dictation Played	Admin	InQuiry User
\mathfrak{D}	1/26/24 11:00 AM	Edited	Admin	InQuiry User
' D	1/26/24 11:01 AM	Completed From Preliminary	Admin	InQuiry User
	1/26/24 11:01 AM	Viewed	Admin	InQuiry User
	1/26/24 11:01 AM	Export Triggered	Document Based on Print Template	Interfacing
	1/26/24 11:01 AM	Export Rendered	Document Based on Print Template	Interfacing
	1/26/24 11:29 AM	Dictation Played	Admin	InQuiry User
	1/26/24 11:29 AM	Viewed	Admin	InQuiry User
	1/26/24 11:30 AM	Printed	Admin	InQuiry User
	1/26/24 1:41 PM	Dictation Played	Admin	InQuiry User
	1/26/24 1:41 PM	Viewed	Admin	InQuiry User
\mathfrak{D}	1/26/24 1:43 PM	Edited	Admin	InQuiry User
	1/26/24 1:43 PM	Viewed	Admin	InQuiry User
	1/26/24 1:43 PM	Export Triggered	Document Based on Print Template	Interfacing
	1/26/24 1:43 PM	Export Rendered	Document Based on Print Template	Interfacing
	1/26/24 1:48 PM	Dictation Played	Admin	InQuiry User
	1/26/24 1:48 PM	Viewed	Admin	InQuiry User
$\mathfrak D$	1/26/24 1:48 PM	Edited	Admin	InQuiry User
9	1/26/24 1:48 PM	Appended	Admin	InQuiry User
			Refresh 🧲	View Archived

The activity log tracks actions that have been performed for the transcription. Activity entries over 90 days are archived can be retrieved using the **View Archived** button. The activity log can be sorted by clicking on the heading. The time zone used is displayed above the log.

- Actions: Actions can be performed from certain activity log items. An icon will appear to the left of the date if an action is available.
- **Date:** The Activity Log tracks the date and time that the action was performed. The date and time are displayed in the time zone mentioned above the Activity log table.
- 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 user type who executed the action. Some login types, such as "Interfacing", are used to indicate automated functions that are carried out by the eSOne server.

11.5 Revision History

Changes made to the transcription, such as workflow changes and edits to the transcription and/or demographics, will create a Revision History entry. The Revision History tracks the specific changes that were made.

Available Revision History items are identified with an icon in the Activity Log entry that created the revision. Clicking on the icon or line item will open the Revision History.

The Revision History contains at least three sections, with more depending on the number of associates and additional authenticators attached to the transcription. All sections are collapsed by default. The section can be expanded or collapsed by pressing the section title. All sections can be expanded or collapsed by pressing the appropriate link at the top of the window.

The revision changes loaded are based on the Activity Log action that was clicked on to open the Revision History. For example, if the "Delivered" Activity Log entry was clicked, then the details in the Revision History will display the details of the transcription when it was delivered to the client, including document, patient and appointment information, the transcription text, and associates and authenticators attached to the transcription at the time of delivery. Additional revision history details can easily be viewed for the same transcription by pressing the previous or next buttons.

The three main sections of the Revision History are Document Information, Patient Information and Document Body.

11.5.1 Document Information

The Document Information section contains most patient and appointment details as well as header information, such as document type, location and provider, and comments. All changes made in this particular edit will be highlighted in orange for easy identification. The column heading will provide information regarding who made the edit and when.

11.5.2 Patient Information

The Patient Information section contains changes made to the patient name, ID, and contact information.

11.5.3 Document Body

The document body section includes changes made to the transcription text. Color coded highlighting identifies text that has been added, removed and reformatted.

12 Comments and Comment Tags

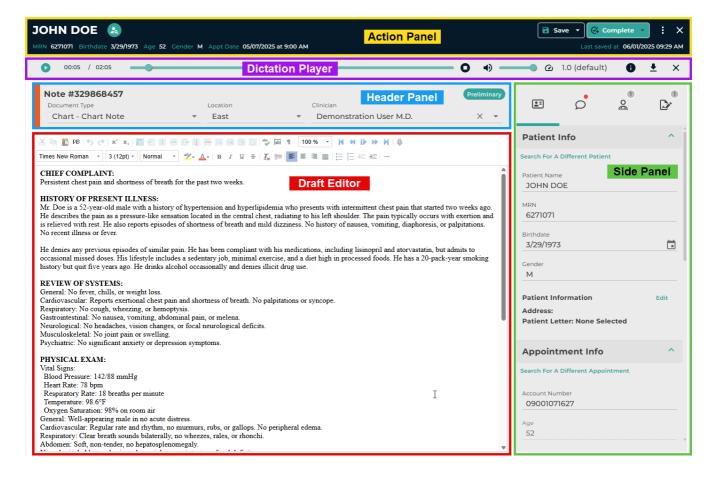
12.1 Comments

Comments are used to provide information about a note 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. Not all users have access to view or edit comments.

12.2 Comment Tags

Comment Tags are an optional feature that allows preconfigured comments to be added to notes. Notes with common issues can be quickly identified and sorted in the Review folders based on Comment Tags. Comment tag names and colors are customizable. Notes with Comment Tags are identified by their assigned color. Notes with multiple Comment Tags appear with a tri-color icon. Not all users have access to view or edit comment tags.

13 Editor Conversion



The Note Editor is divided into five sections. Click the section title below to open the user guide for that section.

Action Panel

- Patient Name, Patient ID, Birthdate, Age, Gender, Appointment Date
- Patient and Appointment search
- Save and Complete actions
- · Close Editor
- Ellipsis Menu
 - · Open the note in view-only mode
 - Open the dictation player
 - Open the next note in the workflow folder
 - View unsaved changes
 - Reset demographics and note text to prior saved state
 - View note info
 - · Fax on demand

- Export on demand
- Print
- Print preview
- Open the legacy editor
- Download
- Move the note back in the workflow
- Submit feedback

Dictation Player

- Play Dictation
- Change dictation playback speed and volume.
- Download Dictation
- Close the Dictation Player

Header Panel

- View the Note ID
- View and change Document Type, Location, Clinician
- View the note's workflow status

Draft Editor

• Edit the note text

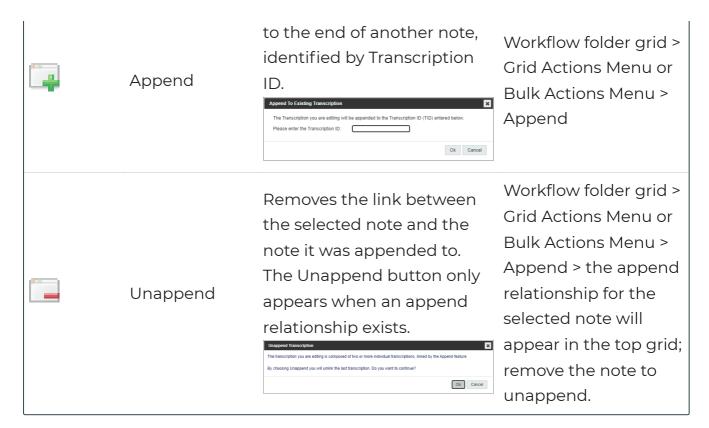
Side Panel

- View and edit:
 - Patient and Appointment Information
 - Comments and Comment Tags
 - Associates
 - Additional Authenticators

The chart below lists actions available in the Legacy Editor and where to find the actions in the Note Editor.

os for
> Save.
Referred o > Add
Press button corner indow.
> Ellipsis The s will the
> olete > d Next

.	Complete	completes the note from the current workflow folder and closes the Note Editor. If the note is in the Preliminary folder the electronic signature will be applied if that feature is being used.	Action Panel > Complete
*	Add Authenticator	Used to add additional signers to the note. This is often used for attendings signing residents' notes. See Authenticators for additional details.	•
	Comment	View and edit note comments and comment tags. Transcription #304340247 Comment Unknown associate. Note: double quotes, < and > characters are not allowed Transcription Tags Acct # or Appt ID Missin Transcription Tags Available Tags Audio Not Played Blanks Chart Nave Invalid chars Invali	Side Panel > Comments tab
The state of the s	Patient Info	View and edit patient contact information. Patient Name	Side Panel > Patient Info tab > Edit button at the bottom.
	Exit	Closes the Note Viewer.	Action Panel > X



14 Note Viewer

JOHN DOE Complete MRN 6271071 Birthdate 3/29/1973 Age 52 Gender M Appt Date 05/07/2025 at 9:45 AM 06/04/2025 03:39 PM Orders Patient Name: JOHN DOE Date of Service: May 7, 2025 Patient ID: 6271071 Date of Birth: March 29, 1973 Appt Reason Code:

Patient Type:

HP

0

The Note Viewer

CHIEF COMPLAINT:

Clinician:

Appt Reason:

User Field 4:

Persistent chest pain and shortness of breath for the past two weeks. No numbness in the arms, face, or legs.

Demonstration User M.D. HISTORY AND PHYSICAL

W14

HISTORY OF PRESENT ILLNESS:

Mr. Doe is a 52-year-old male with a history of hypertension and hyperlipidemia who presents with intermittent chest pain that started two weeks ago. He describes the pain as a pressure-like sensation located in the central chest, radiating to his left shoulder. The pain typically occurs with exertion and is relieved with rest. He also reports episodes of shortness of breath and mild dizziness. No history of nausea, vomiting, diaphoresis, or palpitations. No recent illness or fever.

He denies any previous episodes of similar pain. He has been compliant with his medications, including lisinopril and atorvastatin, but admits to occasional missed doses. His lifestyle includes a sedentary job, minimal exercise, and a diet high in processed foods. He has a 20-pack-year smoking history but quit seven years ago. He drinks alcohol occasionally and denies illicit drug use.

REVIEW OF SYSTEMS:
General: No fever, chills, or weight loss.
Cardiovascular: Reports exertional chest pain and shortness of breath. No palpitations or syncope.

Respiratory: No cough, wheezing, or hemoptysis.

Gastrointestinal: No nausea, vomiting, abdominal pain, or melena.

Neurological: No headaches, vision changes, or focal neurological deficits.

Musculoskeletal: No joint pain or swelling.

Psychiatric: No significant anxiety or depression symptoms.

PHYSICAL EXAM:

Vital Signs: Blood Pressure: 142/88 mmHg

Heart Rate: 78 bpm Respiratory Rate: 18 breaths per minute

Temperature: 98.6°F

Oxygen Saturation: 98% on room air
General: Well-appearing male in no acute distress.

Cardiovascular: Regular rate and rhythm, no murmurs, rubs, or gallops. No peripheral edema

Respiratory: Clear breath sounds bilaterally, no wheezes, rales, or rhonchi. Abdomen: Soft, non-tender, no hepatosplenomegaly.

Neurological: Alert and oriented, cranial nerves intact, no focal deficits

PLAN:

- · Cardiac Evaluation:
 - Obtain ECG immediately.

 - Order troponin levels to assess for myocardial injury. Schedule an exercise stress test and consider echocardiography.
 - Cardiology referral for further assessment.
- Medication Management:
 Start low-dose aspirin (81 mg daily) for CAD prevention.
 Consider adding a beta-blocker (e.g., metoprolol) if stress testing suggests ischemia.
 - Reinforce adherence to lisinopril and atorvastatin.
- · Lifestyle Modifications:
 - Recommend a heart-healthy diet (Mediterranean-style diet, reduced sodium).
 Encourage regular moderate exercise as tolerated.
 Continue smoking cessation support.
- Follow-Up:
 Close follow-up in one week or sooner if symptoms worsen.
 - Reassess after initial cardiac workup and adjust management accordingly.

IMPRESSION:

Given Mr. Doe's risk factors and presentation, there is a high suspicion for CAD. Prompt evaluation and management are essential to reduce the risk of adverse cardiovascular events.

52-year-old male with a history of hypertension and hyperlipidemia presenting with exertional chest pain and shortness of breath, concerning for possible angina or underlying coronary artery disease (CAD). Differential diagnoses include stable angina, gastroesophageal reflux disease (GERD), and musculoskeletal pain. Given his risk factors, further cardiac evaluation is warranted.

Demonstration User M.D.		Authenticating Attending
John B. Hansard		, idea
Date Dictated:	05/09/2025	
Date Transcribed: DU/aaUser	05/09/2025	P
Job #: 329868457		, 50,
cc: Michael Demonstration	on	

Demonstration Clinic

provides a read-only preview of the typed note and is available only for notes that have progressed beyond the Dictations folder in the workflow.

You can open the Note Viewer by selecting **View Note** from the Actions column in the workflow folder grid or from the ellipsis menu in the Note Editor or Note Info screens.

At the top of the viewer, the Action Panel offers quick access to basic patient demographics and available actions. For details on the Action Panel, see Action Panel.

The note content in the viewer may reflect formatting elements from the assigned print template, such as:

- Patient and appointment information with field labels
- Signature blocks with timestamped sign dates (once signed)
- Watermarks based on the document type, current stage in the workflow, and where the Note Viewer was accessed (e.g., from a workflow folder or Search All)

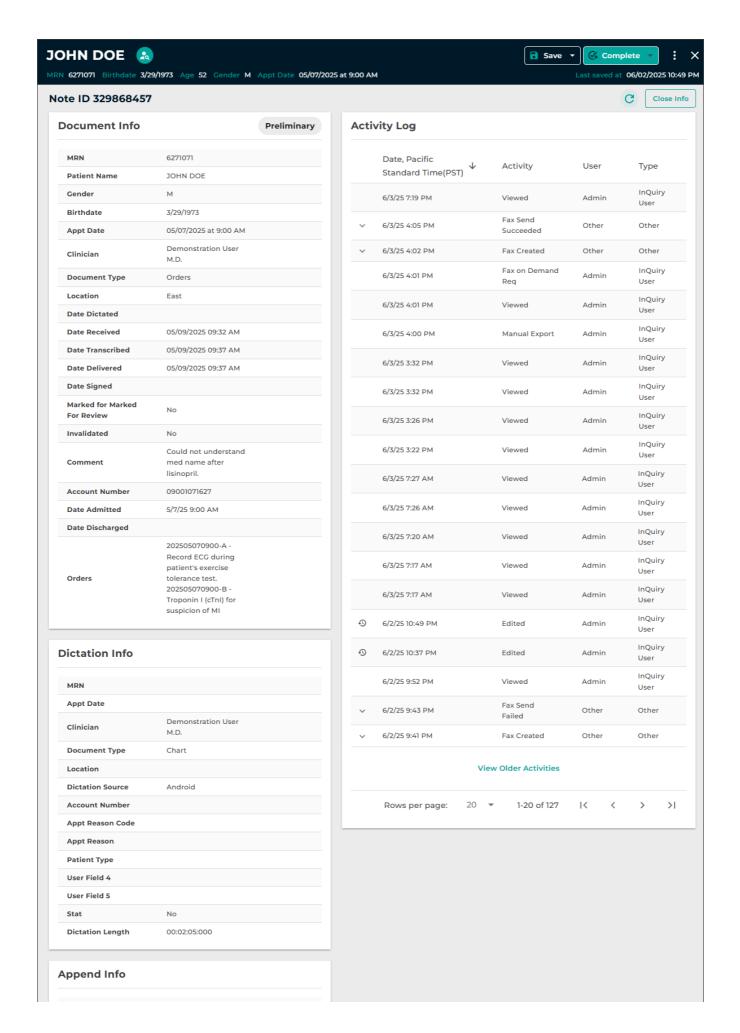


The viewer does not always match the final print layout of the note.

To view the note in its final formatted layout, select Print Preview from the ellipsis menu to generate a rendered PDF.

For more details on printing and configuration, see InQuiry Printing Agent.

15 Note Info





The Note Info page provides detailed information about the note, along with an activity log that tracks the history of changes. It can be accessed from either the Note Viewer or Note Editor.

To open Note Info, select **Info** from the ellipsis menu in the Action Panel, or choose **View Info** from the Actions menu in the workflow folder grid.

Note Info appears as an overlay on top of the Viewer or Editor when opened from those pages. Use the **Close Info** button below the Action Panel on the right side to return to the Viewer or Editor.

Note Info includes five main sections:

- Action Panel
- Document Info
- Dictation Info
- Append Info
- Activity Log

The Note ID is displayed beneath the Action Panel on the left. A **Refresh** button on the right reloads the page with the most recent data.

15.1 Action Panel



The Action Panel appears consistently across the Note Viewer, Note Editor, and Note Info. It contains basic patient demographics, action buttons, and the ellipsis menu. Available options depend on the user's permissions and the note's position in the workflow.

See Action Panel for more details.

A timestamp indicating the last save is shown below the ellipsis menu.

15.2 Document Info

Document Info	Preliminary
MRN	6271071
Patient Name	JOHN DOE
Gender	М
Birthdate	3/29/1973
Appt Date	05/07/2025 at 9:00 AM
Clinician	Demonstration User M.D.
Document Type	Orders
Location	East
Date Dictated	
Date Received	05/09/2025 09:32 AM
Date Transcribed	05/09/2025 09:37 AM
Date Delivered	05/09/2025 09:37 AM
Date Signed	
Marked for Marked For Review	No
Invalidated	No
Comment	Could not understand med name after lisinopril.
Account Number	09001071627
Date Admitted	5/7/25 9:00 AM
Date Discharged	
	202505070900-A - Record ECG during

This section displays readonly details related to the patient, appointment, orders, and workflow. These fields reflect the current values linked to the note. Editing patient or appointment information in the Note Editor updates what is shown here.

	patient's exercise	
Orders	tolerance test.	
	202505070900-B -	
	Troponin I (cTnI) for	
	suspicion of MI	

The note's current position in the workflow is displayed at the top of this section.

15.3 Dictation Info

Dictation Info	
MRN	10088
Appt Date	
Clinician	Demonstration User M.D.
Document Type	Chart
Location	Hospital
Dictation Source	Android
Account Number	89
Appt Reason Code	
Appt Reason	
Patient Type	
User Field 4	1
User Field 5	
Order Num	89
Stat	No
Dictation Length	00:00:23:000

Dictation Info displays a readonly view of the original data associated with the dictation. It includes metadata received at the time of dictation, and does not update if patient or appointment details are changed later.

15.4 Append Info

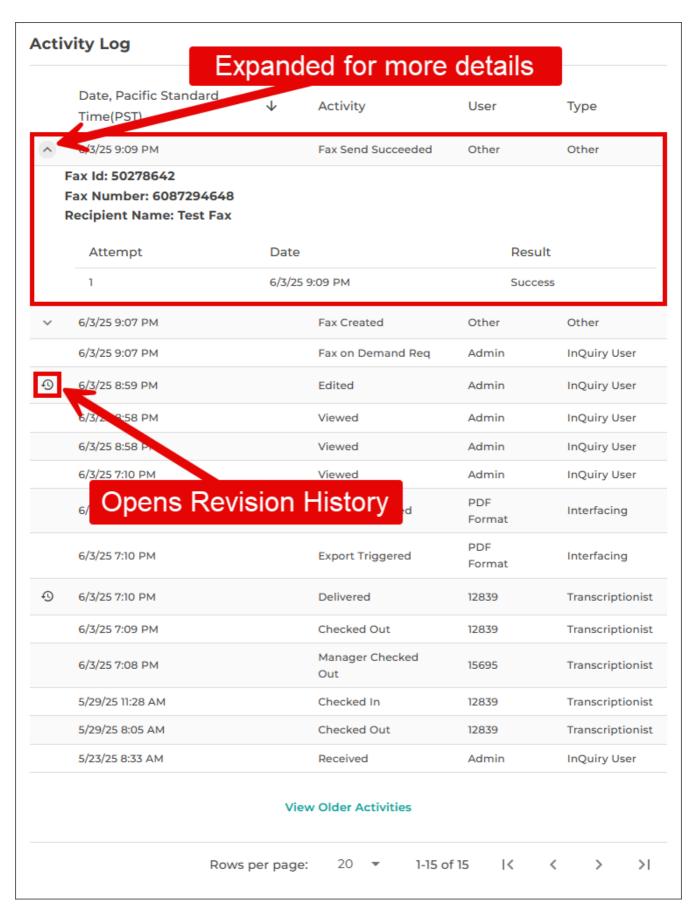
Append Info		
Note #329868457	Preliminary	
Note #304340272	Search All	View Activity Log
Note #312750951	Search All	View Activity Log

This section shows whether the current note is appended to or prepended by any other notes. All linked note IDs are listed, along with their current workflow status.

The current note always appears in the list, even if it's not part of an appended group.

To view the activity log of a listed note, click View Activity Log next to its ID. Only one log can be displayed at a time in the Info page.

15.5 Activity Log



The Activity Log tracks actions performed on the note. Entries older than 90 days are archived and can be retrieved by clicking **View Older Activities** at the bottom of the log.

Click column headers to sort by ascending or descending order. The time zone in use appears above the table.

15.5.1 Activity Log Columns

- Date: Date and time of the action.
- Activity: Description of what was done.
- User: The username, user ID, or function that performed the action.
- Type: The login type or automation responsible for the action (e.g., "Interfacing").

Some actions include additional information. Click the caret \land next to the date to expand the details. Click 1 to open the Revision History.

15.6 Revision History

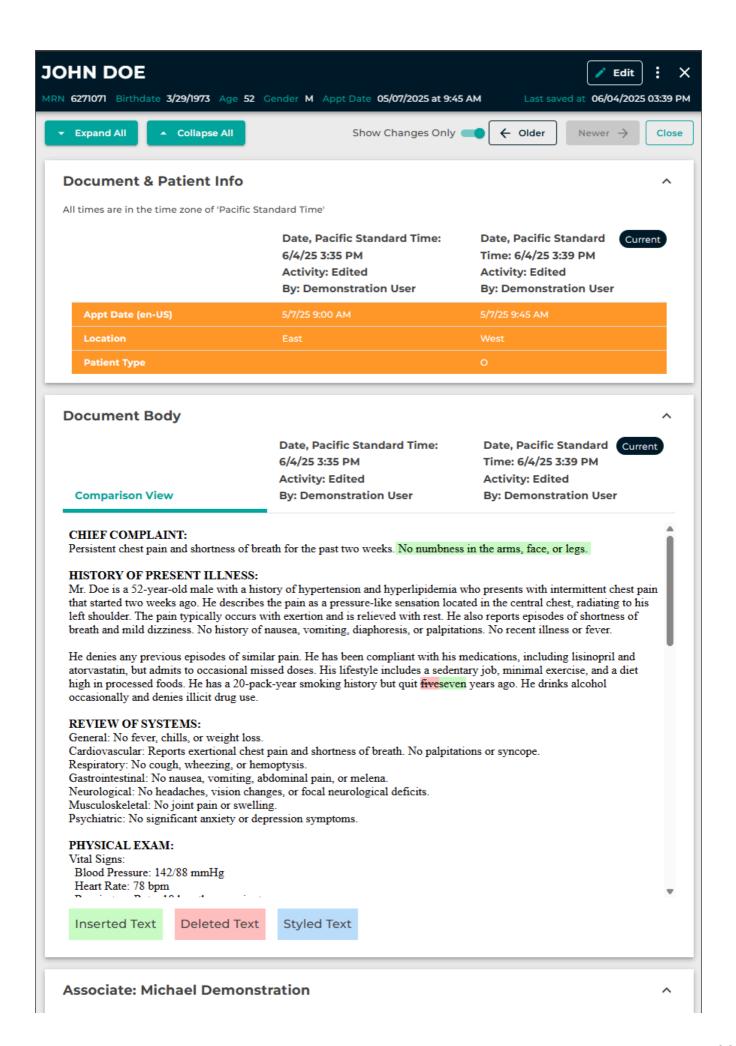
Each time the note is saved, a revision history entry is created. These are marked by a revision history icon \odot next to the date. Click the entry to open the revision details.

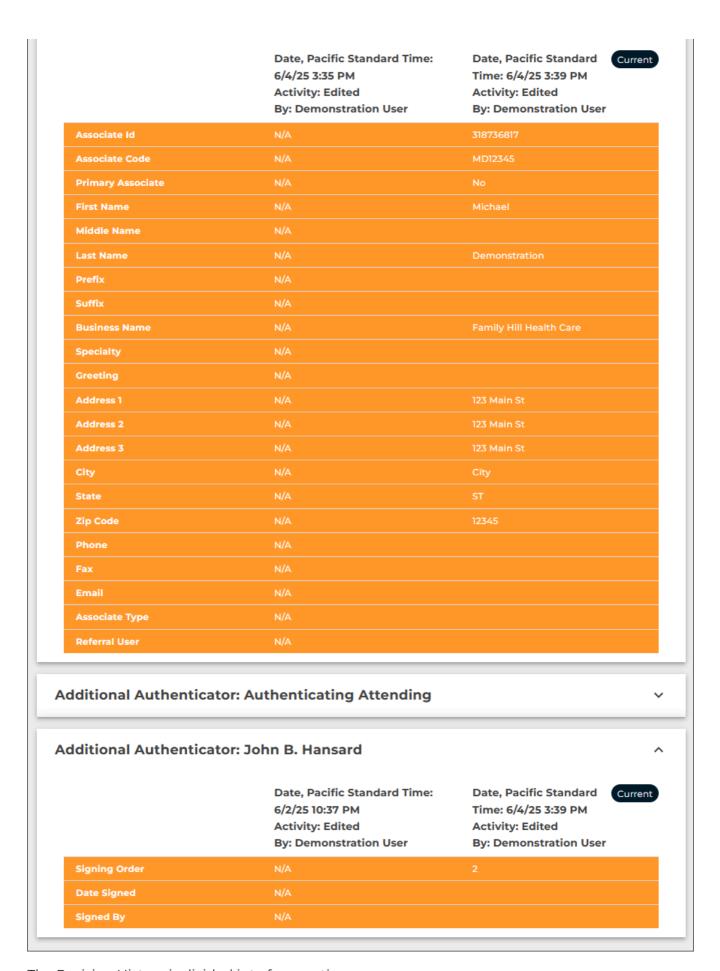
The Revision History controls enable you to filter the displayed data and navigate through the note's revision history.

Revision History Controls

- Expand All: Show details in all sections.
- Collapse All: Hide details in all sections.
- Show Changes Only: Toggle to display only changed fields.
- Older / Newer: Navigate through different revision records.
- Close: Exit Revision History record and return to Note Info.

15.6.1 Revision History Sections





The Revision History is divided into four sections:

- **Document & Patient Info** Includes document details, patient demographics, and appointment information.
- Document Body Displays the full text of the note for the prior and current versions.
- **Associates** Shows associates who have been added to or removed from the note. A separate Associate section appears for each associate.
- **Additional Authenticators** Displays additional authenticators added to or removed from the note. A separate section appears for each authenticator.

In all sections except Document Body, changed fields are highlighted in orange. Toggle Show Changes Only on to display only fields with changes, or off to show all fields.

The **Document & Patient Info**, **Associates**, and **Additional Authenticators** sections display data in two columns:

- **Current Version** Right side; shows the data after the action listed in the Current column header was completed.
- Prior Version Left side; shows the data before the Current action occurred.

Each column header includes the action performed, the timestamp, and the user who made the change.

15.6.2 Document Body Tabs

The Document Body section contains three tabs:

- 1. **Comparison View** Left tab A merged view of the prior and current versions showing added, removed, and stylized text with color-coded markup.
- 2. Prior Version Middle tab Read-only view of the previous version's note text.
- 3. **Current Version** Right tab Read-only view of the current note text.

By default, the Comparison View tab is selected. This view merges the Prior and Current versions to show differences using inline markup.

Select the Prior Version tab to view the note text as it appeared before the change. Select the Current Version tab to see the updated version.

The column header of the selected tab appears in green text.

15.6.3 Restore Prior Versions

With appropriate permissions, you can restore a prior version of the note text. Patient and appointment demographics, referrals, and additional authenticators cannot be restored. The note must be open in the editor, and Info must be accessed from there to enable the restore function.

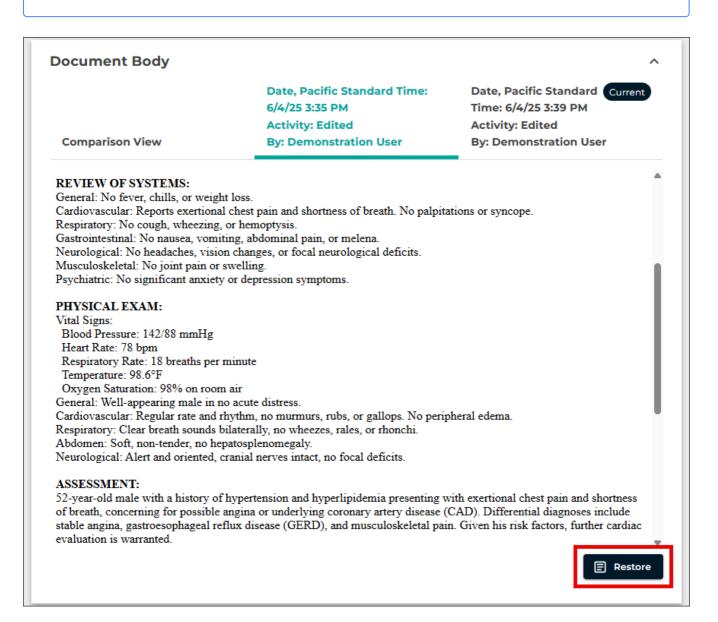
To restore:

- 1. Open the Note Editor.
- 2. Select Info from the ellipsis menu.
- 3. In the Activity Log, select a revision history entry from an Edit action.
- 4. In the Document Body section, choose the Prior or Current tab.
- 5. Scroll down to the bottom of the **Document Body** section and click **Restore**.
- 6. Confirm your action in the pop-up window.
- 7. Save the note in the editor to complete the restore.



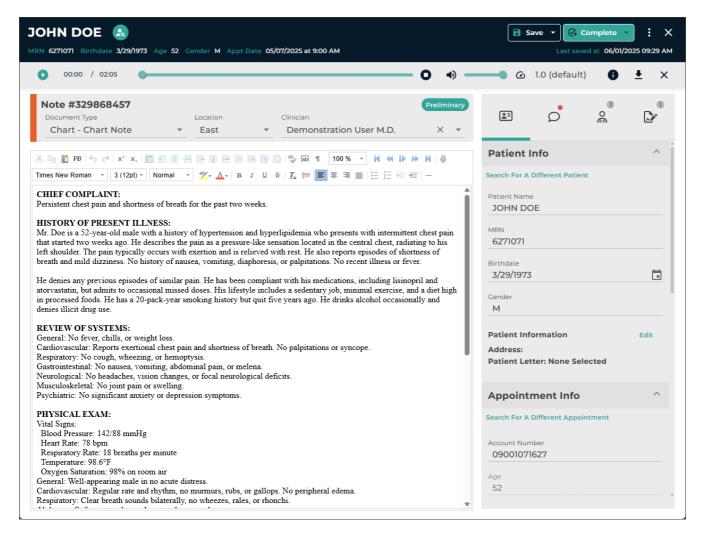
Important

If you close the editor without saving, the restore will not be completed.



16 Using the Note Editor

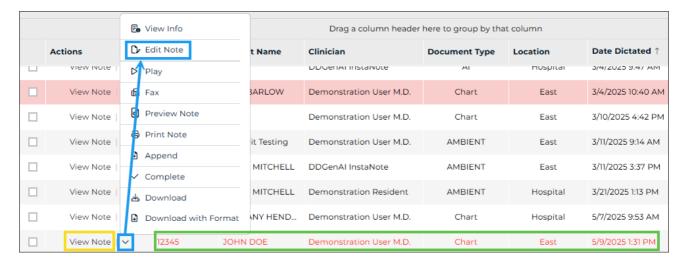
Edits can be made to patient and appointment demographics, note text, referring associates, and authenticators in the note editor. By default, only documents that are in the Marked for Review and Preliminary Folders can be edited.



The note editor can be accessed multiple ways:

· From a Workflow Folder

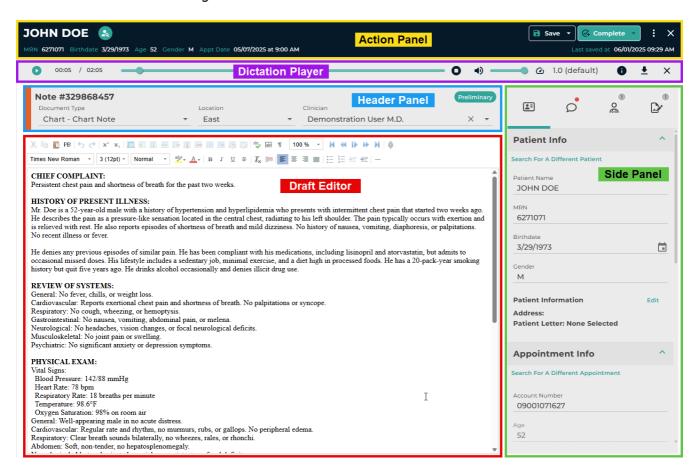
- Click anywhere in the corresponding data grid row, except for the Actions column (the area in the green box in the image below).
- Expand the Actions list in the data grid and choose Edit Transcription (the area in the blue box in the image below).
- Click **View Transcription** in the Actions column (the area in the yellow box in the image below) to open the note viewer, then click **Edit**.



From Search All - Basic Search

• Click anywhere on the given row in the data grid to open the note viewer, then click **Edit** in the top right corner of the Action Panel.

16.1 Note Editor Layout



The Note Editor consists of five main sections, color coded in this image. Each section can have multiple components to it:

Action Panel

- Patient and Appointment search
- Save and Complete actions
- Ellipsis menu
- · Exit editor

Dictation Player

- Dictation playback controls
 - This section is hidden by default, but can be toggled on from the ellipsis menu

Header Panel

- View and change Document Type, Location, Clinician
- View the note's status in the workflow

Draft Editor

Edit the note text

Side Panel

- · View and edit:
 - Patient, Appointment, and Orders
 - Comments and Comment Tags
 - Associates
 - Additional Authenticators

16.2 Action Panel



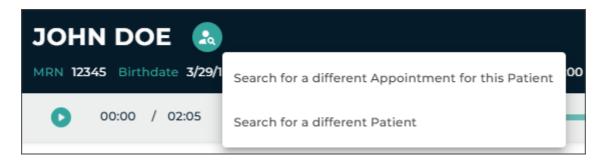
The Action Panel displays a read-only view of the patient ID, birthdate, age, gender, and appointment date. It also provides options to search for a new patient or appointment, save, complete, preview and print notes, and perform additional actions from the ellipsis menu.

16.2.1 Patient and Appointment Search

A patient and/or appointment search can be performed to replace, correct, or add a missing patient and/or appointment to a note. This functionality is only available if the client sends a data feed to eSOne or patient data is manually entered into the eSOne system.

To initiate a search click Search . Two of three options will be presented: **Search for a different Appointment for this Patient** or **Search for a different Order for this Patient** (depending on the document type selected) and **Search for a different Patient**.

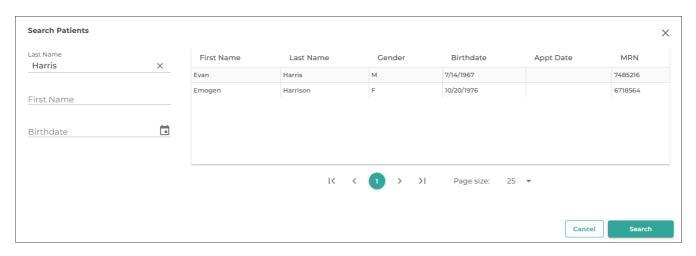
The available search parameters and returned data fields can vary depending on client configuration.



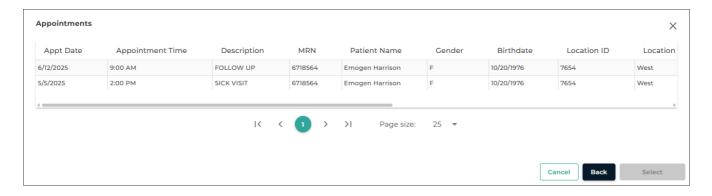
16.2.1.1 Search for a Different Patient

To add or change the patient on a note click Search then select **Search for a different**Patient.

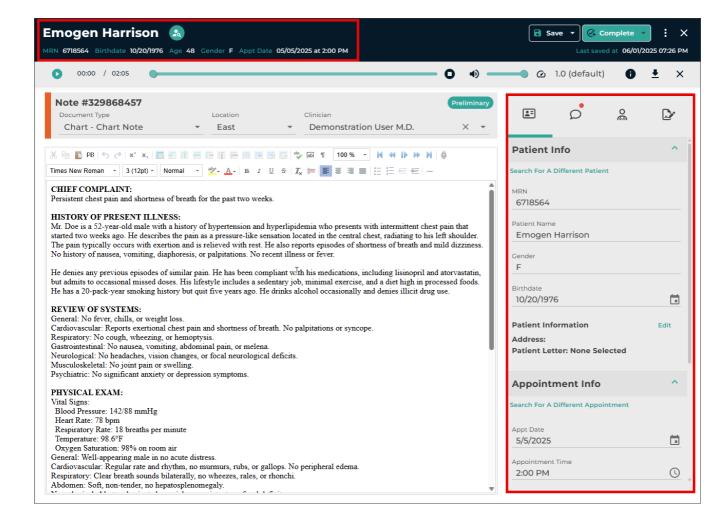
Enter one or more search criteria in the search fields on the left and click **Search**. Matching patient records will load in the grid on the right.



Click the desired patient. If there are patient or order records (based on the document type chosen) for the selected patient, the Appointment or Order list will open.



If no appointments or orders exist for the patient, you will be returned to the editor. The new patient demographics will be populated in the Action Panel and Patient Info tab in the Right Panel.

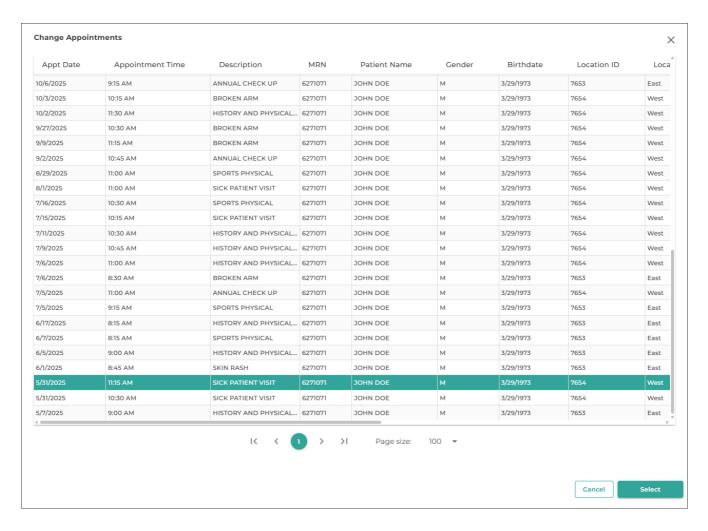


16.2.1.2 Search for a Different Appointment or Order

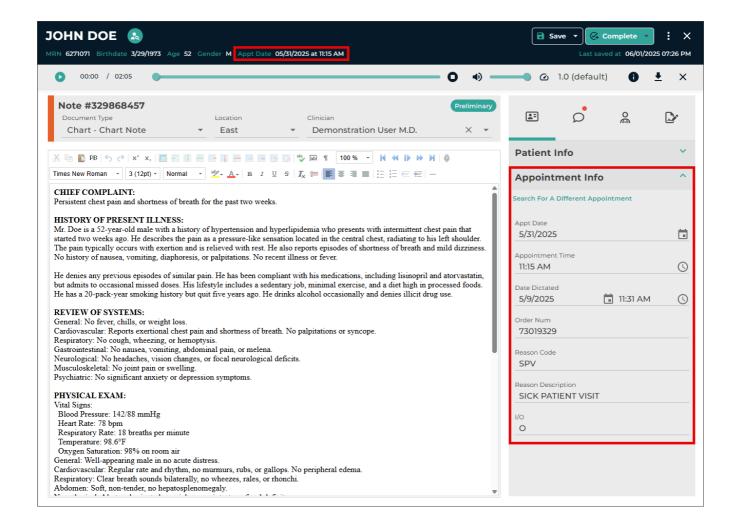
Document types can be configured to contain appointment records or orders. The appointment or order search option presented in the patient search menu will depend on the document type selected.

To search for a different appointment for the same patient select **Search for a different Appointment for this Patient**. To search for a different order for the same patient select **Search for a different Order for this Patient**. If a Patient ID or patient is not selected, the search options for Appointments or Orders will be disabled.

A list of appointments or orders (depending on the document type configuration) for the patient will be displayed. The available data fields in the search results may vary based on the client configuration.



Click the desired appointment or order then **Select** to attach it to the note. The demographics in the Action Panel and the Right Panel will update with the appointment information.

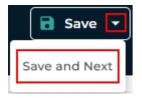


16.3 Save

The Save button has two modes:



Press the left side of the button to save changes to the note, including text and demographics, and keep the current note loaded in the editor.



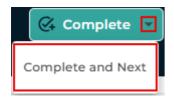
Press the right side of the button to expand the save menu and choose **Save** and **Next**. Changes will be saved and the next note in the grid will load in the editor.

16.4 Complete

The Complete action saves the note and moves it forward in the workflow. The **Complete** button also has two modes:

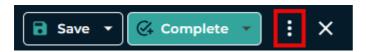


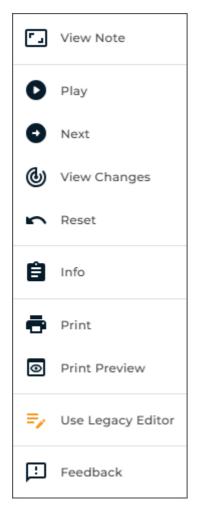
Press the left side of the button to save the note and progress it to the next step of the workflow. The editor window will close and you are returned to the workflow folder view.



Press the right side of the button to expand the complete menu and choose **Complete and Next**. Changes will be saved, the note will progress to the next step of the workflow, and the next note in the grid will load in the editor.

16.5 Ellipsis Menu





The ellipsis menu provides additional options based on client configuration, workflow status, and user access rights.

- View Note Opens the note in read-only mode. This option is available only for notes that have moved beyond the Dictations folder.
- **Play** Toggles the dictation player controls in the editor. When toggled on, the dictation will begin playing.
- **Next** Opens the next note in the workflow folder or the next result from the Search All search results in the editor.
- **View Changes** Opens the Current Changes window with a color-coded view of changes made to the note text since the last save.
- **Reset** Removes unsaved changes to the note text, patient and appointment demographics, orders, and additional note attributes.
- Info Opens Note Information in a new tab.
- **Print** Prints the note through the Printing Agent, applying any configured letterheads and watermarks for the document type.
- **Print Preview** Displays a preview of the formatted note in the Printing Agent, including any letterheads and watermarks configured for the document type.
- Open Legacy Editor Opens the note in edit mode using the previous version of the transcription editor. See Legacy Editor Access below for details.
- Feedback Opens a form in a new tab, allowing you to submit feedback, ask questions, or report minor issues related to the note editor or InQuiry. See Your Feedback Matters below for details.

During the transition phase through July 8, 2025, users will have access to the legacy editor should the need arise. This ensures a seamless experience as you transition and explore the new features. Expand the Action Menu and choose **Use Legacy Editor**. When switching from the note editor back to the legacy editor, you will see a pop-up asking if you'd like to leave feedback. We strongly encourage you to share your thoughts, as understanding why users revert to the legacy editor helps us identify areas for improvement and address any gaps in the note editor.

16.5.2 Your Feedback Matters

Your feedback is essential in helping us identify areas for improvement and ensure a seamless experience for all users. We encourage you to share any minor issues, suggestions, or comments by clicking **Feedback** in the ellipsis menu.



If you require immediate assistance with InQuiry Note Editor, Viewer, or Info pages, please follow your standard support procedures instead of submitting feedback.

When reporting an issue or sharing suggestions, please include the following information whenever possible:

- 1. **Note ID:** Include the unique identifier of the affected note.
- 2. **Steps to Reproduce:** Provide a step-by-step description of the actions that led to the issue, including the workflow folder, screen or feature you were using.
- 3. **Screenshots or Recordings:** Visuals can help us understand the issue faster. If you share screenshots, please ensure all Protected Health Information (PHI) is redacted.
- 4. **Expected vs. Actual Behavior:** Let us know what you expected to happen and what actually occurred.
- 5. **Device Details:** Mention the operating system and web browser version (e.g. Windows 11 Enterprise 24H2 x64, Chrome 131.0.6778.266)
- 6. **Additional Context:** Share any other details that might help us understand the issue better, such as your internet connection or time of occurrence.

Your thorough feedback helps us improve the experience for everyone.

16.6 Close



The **Close** button exits the note editor without saving changes. If there are unsaved changes, a confirmation message will appear,

allowing you to save before closing.

16.7 Dictation Player

InQuiry supports an in-editor dictation player, allowing users to control audio playback while editing a note. The dictation player is hidden by default, but can be opened by selecting **Play** from the ellipsis menu.



Once opened, the dictation will begin playing and dictation playback controls will appear below the Action Panel. The playback controls may display differently depending on the browser used.

To hide the dictation player click the **X** at the far right side of the player controls.

The dictation player status is saved. If the player is open when the note editor is closed, it will be open in the next note. If the dictation player is hidden, it will not appear in the next opened note.

Use the controls to adjust the playback speed, play/pause the audio, and move forward and backwards in the audio.

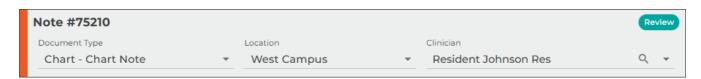
The following keyboard shortcuts are available:

- ALT + Shift + S Go To Start
- ALT + Shift + R Rewind
- ALT + Shift + P Play/Pause
- ALT + Shift + F Fast Forward
- ALT + Shift + E Go To End

Foot pedals that are capable of being configured to send specific keystrokes can also be used to control audio while simultaneously editing. Please refer to your foot pedal manufacturer's user manual for assistance in configuring the shortcuts.

16.8 Header Panel

The Header Panel displays the **Note ID** and the current **workflow status** of the note. It also allows key details to be edited, including the **Document Type**, **Location**, and **Clinician** associated with the note.



 Note ID - Identification number for the note. This can be used to search for notes in workflow folders and Search All.

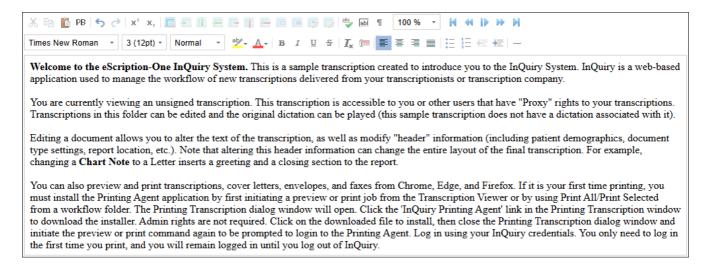
- Workflow Status Displays the current stage of the note within the workflow, represented by its assigned folder name.
- **Document Type** Specifies the work type assigned to the note, which may determine its formatting and structure.
- **Location** Depending on the client's setup, this field represents either the appointment location or the department within the facility.
- Clinician The provider who dictated the note.

Depending on user access rights, the Document Type, Location, and Clinician fields may be edited. To make a change, expand the selection list and click the desired value.

A search function is available in the Clinician field. Click the search icon to open the search, then begin typing the clinician's first or last name. The list will dynamically filter results as you type, helping you quickly find the correct provider.

16.9 Draft Editor

The Draft Editor enables users to make changes to the body of the note. The toolbar provides various tools to enhance document formatting, including options to create and modify tables, add lists, run a spell check, and more.



If the user has access to edit note header information but not the note text, the draft editor toolbar will not appear and the text will be read-only.

16.10 Side Panel

The Side Panel displays key details about the patient, appointment, orders, and other note attributes. It is organized into sub-tabs, each grouping related information for easy navigation. The availability, layout, and data fields, as well as which fields are editable or read-only, are determined by client configuration and user access rights. This ensures that users only see the relevant details for a given note, tailored to their specific access.

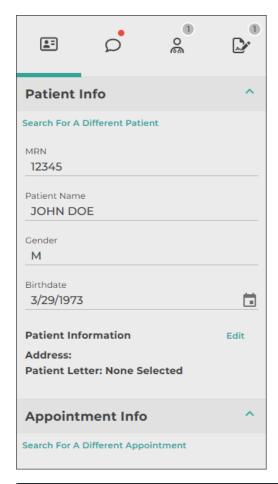
- Patient Info Displays patient and appointment information and allows for edits.
- Orders Displays attached orders related to the note.
- **Comments** View, edit, add, or remove comments and comment tags associated with the note.
- **Referred Associates** Lists associates who will receive a copy of the note, with options to add, remove, or edit associates.
- **Signers** Manage additional authenticators by viewing, adding, or removing them from the note.

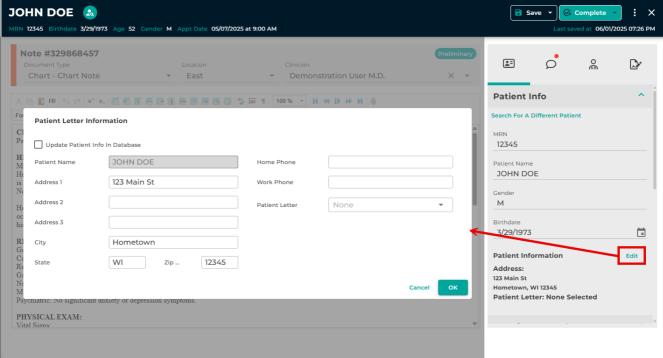
16.10.1 Patient Info

The Patient Info sub-tab contains patient and appointment information. The layout and data fields in the demographics are customizable by the client, as well as which fields are editable or read-only. If a patient record is attached to the note, data from that record will automatically populate the fields here. Alternatively, patient and appointment information can be manually entered.

The Patient Info sub-tab is divided into two sections: **Patient Info** and **Appointment Info**. Each section can be collapsed and expanded.

16.10.1.1 Patient Info Section





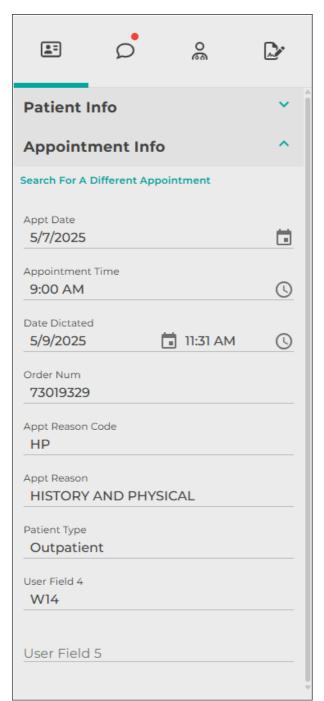
The Patient Info section contains general patient information. The default fields displayed are Patient ID, Patient Name, Gender, and Birthdate.

Additional patient contact details, including address and phone numbers, can be edited by clicking **Edit** at the bottom of the Patient Info section in the Patient Info sub-tab. A patient letter can also be selected within this window. To save the updated contact information to the patient's record in the eSOne system for use in future notes, check the Update Patient Info in Database checkbox.

A patient search can be initiated by clicking **Search For a Different Patient** at the top of the Patient Info section. This performs the same action as clicking Search in the Action panel, then choosing *Search for a different Patient*.

To add or update patient information without searching for a new patient, type in the desired fields and press **Save** to apply the changes. The patient demographics in the Action Panel will update with the new information.

16.10.1.2 Appointment Info Section

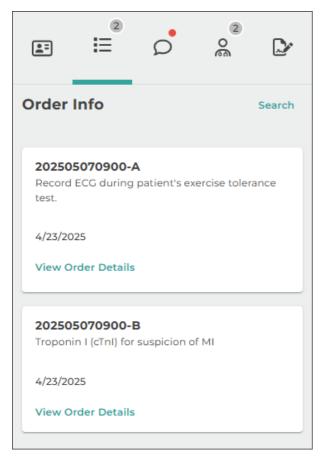


Appointment details are displayed in the Appointment Info section.

The **Search For a Different Appointment** link at the top of the Appointment Info section will allow you to choose an appointment affiliated with the patient ID. This link performs the same action as clicking the *Search* button in the Action panel and selecting *Search for a different Appointment for this Patient*. The link is disabled if the Patient ID is not populated, as a valid Patient ID is required to perform an appointment search.

To add or update appointment information without searching for a patient, enter the desired information in the appropriate fields and click **Save**. The patient demographics in the Action panel will update to reflect the changes.

16.10.2 Orders



The Orders sub-tab displays order-related details and is available in the side panel only when the selected document type is configured to be orders-based instead of appointment-based. A count of attached orders will appear next to the Orders subtab icon.

Each order attached to the note appears in its own card within the Orders sub-tab. Each card includes the **order number**, **description**, and **date observed**.

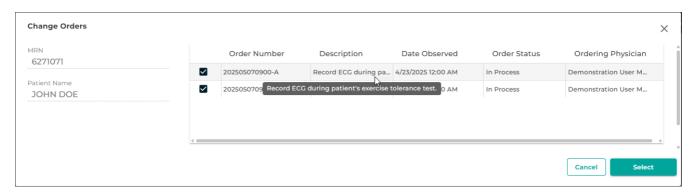
When an orders-based document type is selected and a patient search is performed, affiliated orders will be available to select and attach to the note after choosing a patient.

You can also add orders by:

- Clicking the Search button in the Action panel and selecting Search for a different order for this patient, or
- Clicking the Search link in the Orders sub-tab.

This functionality is only available if the client sends a data feed to the eSOne system or if order data is manually entered into eSOne.

The fields displayed in the Orders list depend on client configuration. If any data is cut off due to space constraints, hover over the field to view the full text.



To add orders to the note:

Check the box next to each applicable order.

Click **Select** to attach the selected orders to the note.

Multiple orders may be attached to the same note only if all selected orders are linked to the same appointment record or none of the selected orders are linked to an appointment record.

If one or more of the selected orders is linked to an appointment, the Appointment Info sub-tab will also populate with the related appointment details.

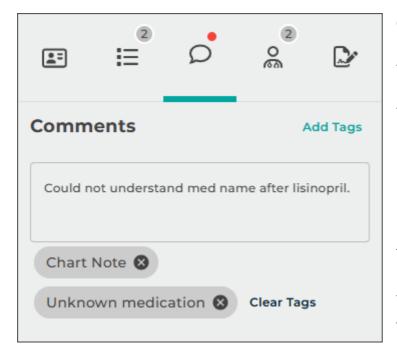
To remove an attached order:

- Perform an order search again and select only the orders you want to keep. This will overwrite the previously selected set.
- To remove all orders from the note, change the document type to one that is not orders-based. If needed, you can then change the document type back to the original type.

16.10.3 Comments

The **Comments** sub-tab allows users to view and manage comments and comment tags associated with a note. Comments are internal and are **not** included in the printed note.

16.10.3.1 Using Comments



Comments are used to share information related to a note that may be helpful to transcriptionists, providers, or other staff members. Comments can be accessed in two ways:

- By clicking the Comments sub-tab in the side panel
- By clicking the **Comments** icon in the workflow

To add, edit, or remove a comment, click inside the **Comments** text box and make the desired changes. Press **Save** in the Action panel to save the comment.

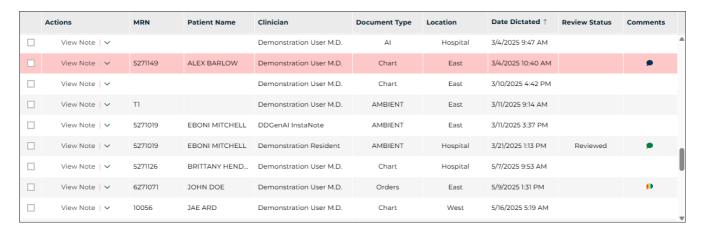
16.10.3.2 Using Comment Tags

Comment Tags are optional, preconfigured labels that can be added to notes. They are typically used to flag notes with common issues, making them easier to identify and sort in Review folders. Tag names and colors are customizable by the organization.

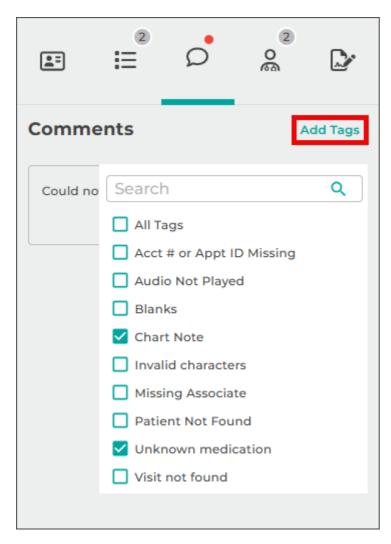
Notes that contain comments and/or comment tags are visually marked in workflow folders and mobile apps:

- A dark blue icon indicates the note contains a comment only
- A colored icon indicates the note has one comment tag

• A tri-color icon indicates the note has multiple comment tags



16.10.3.3 Adding and Removing Comment Tags



To add comment tags:

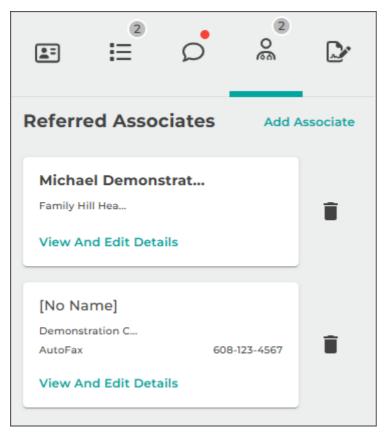
- 1. Click Add Tags
- 2. Check the box next to each tag you want to apply
- 3. Close the tag list to return to the note
- 4. Press Save in the Action panel to add the comment tags

To remove comment tags:

- Click the X on a tag displayed below the comment text box
- Or, uncheck the tag in the Add Tags list
- To remove all tags, click Clear Tags

Not all users have access to view or edit comments and comment tags. Access is controlled by user role and system configuration.

16.10.4 Referred Associates



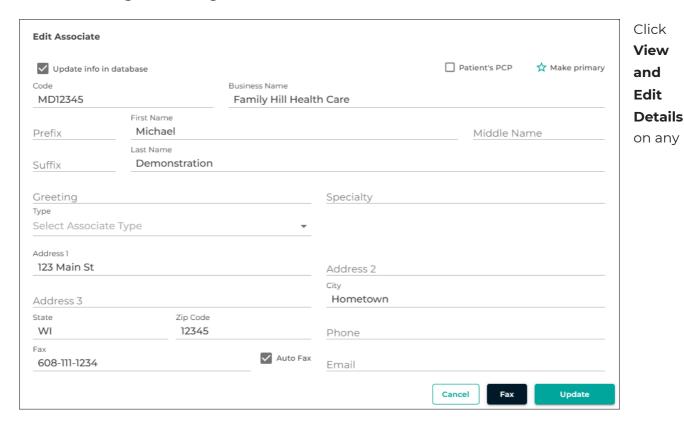
The **Referred Associates** sub-tab displays individuals or organizations who should receive a copy of the note. These can include physicians, clinics, or other relevant parties.

Each associate appears as a card in the Referred Associates list. A count of associates added to the note is displayed next to the **Referred Associates** sub-tab icon.

Each card contains:

- The associate's name and/or business name
- If the associate is configured as an AutoFax recipient, the card will display
 AutoFax followed by the fax number
 Example: AutoFax: 555-123-4567

16.10.4.1 Viewing and Editing Associate Details



associate card to open the Edit Associate window. From here, you can:

- Edit the associate's contact details
- Configure note-specific or permanent changes
- Mark the associate as the patient's **Primary Care Provider (PCP)**
- Set the associate as the **Primary Associate** for the note
- Enable or disable AutoFax

To apply changes only to the current note, leave the **Update info in database** checkbox **unchecked**.

To update the stored associate record for future use, **check** the **Update info in database** checkbox.

16.10.4.2 Associate Options Explained

- **Patient's PCP**: Indicates the associate is the patient's Primary Care Provider. PCPs are copied on all notes for that patient, but can be manually removed.
- **Make Primary**: Designates the associate as the Primary Associate. This is typically the main recipient of the note. Only one primary can be selected.
- **AutoFax**: Automatically sends a faxed copy of the completed note when the client's AutoFax trigger is met.
- To enable AutoFax: check AutoFax and Update info in database
- To disable AutoFax for this note only: uncheck AutoFax and leave Update info in database unchecked
- To disable AutoFax permanently: uncheck both AutoFax and Update info in database

Click **Update** to save changes, or **Cancel** to discard them.

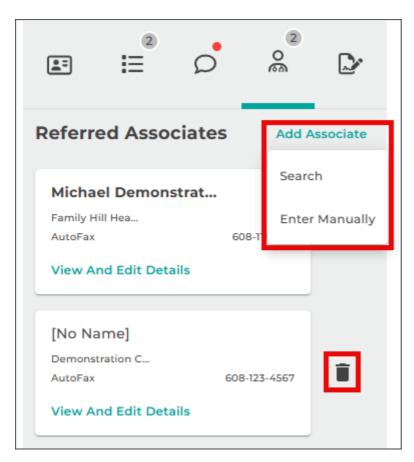
To immediately fax the current version of the note, click **Fax**. Be sure the note is finalized and accurate before sending.



Caution

Clicking Fax sends the note immediately. There is no preview.

16.10.4.3 Adding and Removing Associates



To **add** a referred associate:

- 1. Click **Add Associate** at the top of the Referred Associates sub-tab.
- 2. Choose one of the following options:
 - Search If your organization uses an associate database, enter at least one search term and click
 Search. Select the desired associate, then click Add.
 - Enter Manually Enter the associate's information directly.
 Complete all relevant fields and click Add.

To **remove** an associate, click the **trash** can icon on the associate card.



Important

There is no confirmation prompt when removing an associate.

This action **cannot be undone**, but the associate can be re-added by searching the database or entering the information manually.

16.10.4.4 Final Step: Save Changes

After making any changes to the Referred Associates list, always click **Save** in the Action panel of the note editor to retain your updates.

16.10.5 Signers

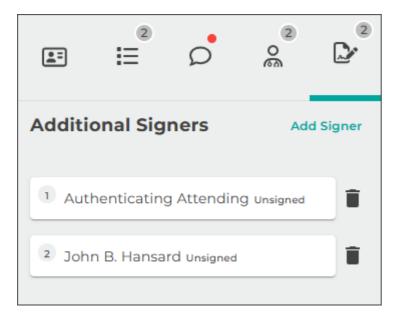
The **Signers** sub-tab allows you to designate additional signers (also known as authenticators) who must review and sign the note in addition to the dictator. This is commonly used in teaching clinics or hospitals, where attending physicians must attest to the accuracy of a resident's note.



Use Case Example

Attending physicians signing off on residents' notes is a common scenario for additional signers.

16.10.5.1 Adding Additional Signers



To add a signer:

- 1. Click **Add Signer** in the top-right corner of the **Signers** sub-tab.
- 2. A list of eligible signers will appear.
- 3. Check the box next to each signer you wish to add, **clicking them in the** order they should sign.

The signers are added in the order selected. This order determines the signature workflow:

- The **first added signer** will sign after the dictator approves the note.
- Subsequent signers will have access to the note in sequence in the traditional workflow.
- The **last added signer** will complete the signing process.

The signing order cannot be changed after signers are added. To adjust the order, remove all signers and re-add them in the desired order.

16.10.5.2 Removing Signers

To remove a signer click the **trash can icon** next to the signer's name.

17 Faxes

Facsimiles or faxes are generated through Fax on Demand or by utilizing the eSOne AutoFax or Distribution Rules features. The Manage Faxes tab is available to track or resend faxes, and Pending Faxes is used to monitor AutoFax jobs that have not yet reached the fax trigger.

17.1 Manage Faxes

The Manage Faxes tab looks similar to the Search All screen, but the search fields have been optimized for searching through faxes and recipients. By default, users do not have access to the Manage Faxes or Pending Faxes tabs. Manage Faxes can be accessed from the left Navigation menu > Search All > Faxes or Faxes > Manage Faxes.

Upon loading the Manage Faxes page, the Advanced Search parameters window is presented. Data is not returned until a search is submitted. If the Advanced Search window is closed without submitting a search, the page will be empty. Click on Advanced Search to enter criteria and submit a search.

Searching and filtering in the Faxes tabs is very similar to searching in Search All - Basic Search, but the Advanced Search window has different criteria fields. See Building a Search and Filter Search Results for more details.

17.1.1 Facsimiles Functions

Several actions are available to manage facsimiles. Actions can be taken on individual fax jobs or selected fax jobs. To perform an action on an individual fax, click on the proper action in the Actions column of the fax line item (expand the Actions menu with \checkmark . To perform an action on multiple fax jobs, select the needed jobs by clicking the check box in each line item and select the appropriate action from the Bulk Actions list above the grid.

17.2 Pending Faxes

Use the Pending Faxes page to search for transcriptions that will queue up for AutoFax, but that have not passed the AutoFax trigger point. Manage Faxes can be accessed from the left navigation menu > Search All > Faxes, then select the Pending Faxes tab at the top of the page, or navigation menu > Faxes > Pending Faxes.

Upon loading the Pending Faxes page, the Advanced Search parameters window is presented. Data is not returned until a search is submitted. If the Advanced Search window is closed without submitting a search, the page will be empty. Click on Advanced Search to enter criteria and submit a search.

17.2.1 Pending Facsimiles Functions

Three actions can be taken on transcriptions with pending faxes. Actions are found in the Actions column. **View Transcription Info** is the default action. Expand the actions menu to view and select additional options.

- View Transcription Info: Display the Info screen for the transcription. Click
- **Download:** Download the TIFF image generated that will be sent through the fax service.
- **Cancel:** Prevent the AutoFax job from being created when the transcription passes the trigger point.
- **Restore:** Restore a canceled AutoFax job so a fax will be created when the transcription passes the trigger point.

18 Shadow Print

ShadowPrint 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 configured in InCommand and managed through the InQuiry application and has a manual for installation, configuration and maintenance. The Shadow Print manual can be found at the links below:

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

Canada https://www.escription-one.ca/Software/ShadowPrint/

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

19 ShadowLink

ShadowLink is a service capable of interfacing with client side HER and patient scheduling software using a variety of formats. ShadowLink is configured in InCommand and can be managed in InCommand InQuiry. The manual for installation, configuration and maintenance can be found at:

Australia https://www.escription-one.com.au/Software/ShadowLink/

Canada https://www.escription-one.ca/Software/ShadowLink/

United States https://www.escription-one.com/Software/ShadowLink/

20 In Vision

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. Report access can be managed in InCommand. The InVision tab contains three subtabs: Reports, Scheduled Reports and Saved Reports.

20.1 Reports

The Reports tab lists all reports available to the user. InQuiry InVision contains reports in six different groups: Production Reports, Workflow Reports, User Reports, Miscellaneous Reports, ShadowScribe Reports and Performance Reports. Clicking on a report title takes opens the New Report tab and presents report parameters and scheduling options.

*Not all reports are listed in the above screenshot.

20.1.1 Report Parameters

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

- For Reports to be run immediately for specific dates: enter a date as 'm/d/yyyy', such as 8/19/2019. 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 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

20.1.2 Report Schedule

The Report Schedule section contains options for running the report, including the name, report format, notifications.

Reports can be run immediately or scheduled to run once or on a reoccurring basis. The following fields are 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 report can be generated in CSV, Excel, MHTML, PDF, XLSX, or XML. Choose the format that works best for the intended use.
- **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.
- **Notification** Choose if and to be notified when the report is ready to be viewed. One, both, or neither of the options can be selected.
- On-Screen A pop-up notification with a clickable link will appear within the InQuiry window when the report is ready. If multiple reports are ready at the same time the last report to run will be listed.
- **Email** An email will be sent to the address in the text box when the report is ready to be viewed. The email address is pre-populated with the address saved in the user profile but can be edited in the provided text box. Multiple email addresses can be entered separated by commas.
- **Schedule Options** Choose to have the report run immediately (Queue Now) or at a scheduled time (Schedule).

If Schedule is selected in Schedule Options, this section will be available.

The frequency that the report runs depends on the schedule options selected. The report can run once at a specified time, daily, weekly, monthly and can also be schedule run every x number of days/weeks/months. The schedule options change depending on the frequency selected.

- Once Select the date and time for the report to run.
- Example This data is only needed once but I want to run it at mid-day.
- **Daily** Choose to have the report run every x days or every weekday at the specified time.
- **Example** I would like to run the report every two days at 2:00pm.
- **Weekly** Choose to have the report run every x weeks or every week on the selected day(s) at the specified time.
- Example I would like to run the report every other week on Monday and Friday at 5:00pm.

- **Monthly** Choose to have the report run every x days of every x months or have the report run on the first, second, third, fourth or last day, weekday, weekend day, or specific day of the week every x months at the specified time.
- Example I would like to run the report on the first Monday of every month at 7:00am.

Note: The scheduled time does not indicate when the report will be available to view, but when it starts running. If there is a high volume of reports running at the scheduled time or if there is a large amount of data to gather for the report, there may be a delay in the delivery of the report. We recommend scheduling reports to run during off-peak hours, such as midnight.

20.1.3 Submit and Reset

To submit the report parameters and run the report (if Queue Now is selected) or schedule the report for a future run, press Submit after all options are selected. After pressing Submit a confirmation window will appear with the next run date for the report.

To reset the report parameters and scheduling options to their default values press the Reset button.

20.2 Scheduled Reports

The Scheduled Reports tab lists reports that have been recently run or are scheduled to run. Report schedules and parameters can be edited from this screen.

Grouping and filtering functions are the same as in the Faxes grid. Please see **Grouping, Sorting** and **FilteringGrouping, Sorting** and **Filtering** for more information

20.2.1 Scheduled Report Actions

Several actions can be taken on a scheduled report.

- Report Information Use the arrow buttons to expand or collapse information about individual reports or groups. Information about the report, schedule, and specified parameters are available when clicking on an individual report's row.
- 2. **Check Box** Use this checkbox to mark the report as Selected. All line items can be selected by pressing the Select All button in the column header.
- 3. **Edit Button** Clicking this button opens a new window that allows users to edit the report parameters and run schedule.
- 4. **Copy Button** Clicking this button opens a new window to copy the selected report and its parameters to a new scheduled report.
- 5. **Delete Button** This button deletes the scheduled report. To temporarily stop a scheduled report from running, edit it so that it is inactive rather than deleting it.

- 6. **Run Button** This button runs the scheduled report immediately using the saved report parameters.
- 7. **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.

20.3 Saved Reports

The Saved Reports tab contains the report output for all reports run manually or from a schedule. The list is very customizable to easily find the report based on specific criteria. See **Grouping**, **Sorting and FilteringCrouping**, **Sorting and Filtering** for more information. Clicking a report row prompts the user to download or open the report file.

- 1. **Report Information** Use the arrow buttons to expand or collapse information about individual reports or groups. The parameters used when the report data was generated is available to view but cannot be changed.
- 2. **Check Box** Use this checkbox to mark the report as Selected. All line items can be selected by pressing the Select All button in the column header.
- 3. **Delete Button** This button deletes the saved report.
- 4. **Download Button** Download or open the report file.
- 5. **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.