



## InQuery User Guide

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# 1 Introduction to InQuery

## Note

This InQuery user guide is currently being edited and is updated frequently. Please check back often for the most updated user guide.

InQuery 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. InQuery 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 InQuery can help produce a document that is more reliable and consistent than one produced with traditional transcription services.

The screenshot displays the InQuery Admin Dashboard. On the left is a dark sidebar with the DeliverHealth logo and navigation options: Home, Patients, Scribe, Search All, Workflow, Faxes, ShadowPrint, ShadowLink, and Reports. The main content area is titled 'Welcome Admin' and features a 'Workflow' section with seven cards: Dictations (61, STAT: 27), Marked For Review (4), Marked For Review (0), Preliminary (6), Referral (3), Final (9), and Final 2 (15). Below this is an 'At a glance' section with four panels: Latest News (welcome message dated 2/10/22), Top Priority Transcriptions for Sign Off (listing MOSES AYEGBA, DERRICK WILSON, and NUMBERS PARKINSON with MRN and dictation dates), Recent Reports (Associate Referral Detail and Action Monitor), and Dictation Stat vs Normal (a bar chart comparing 'Stat' at approximately 45 minutes and 'Normal' at approximately 70 minutes). Other panels include Quick Guides (Phone Dictation Instructions, Graphical Signature Form, InVision Column Reports Manual) and Fax Summary (Queued Faxes: 0, Failed Faxes: 1).

## 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

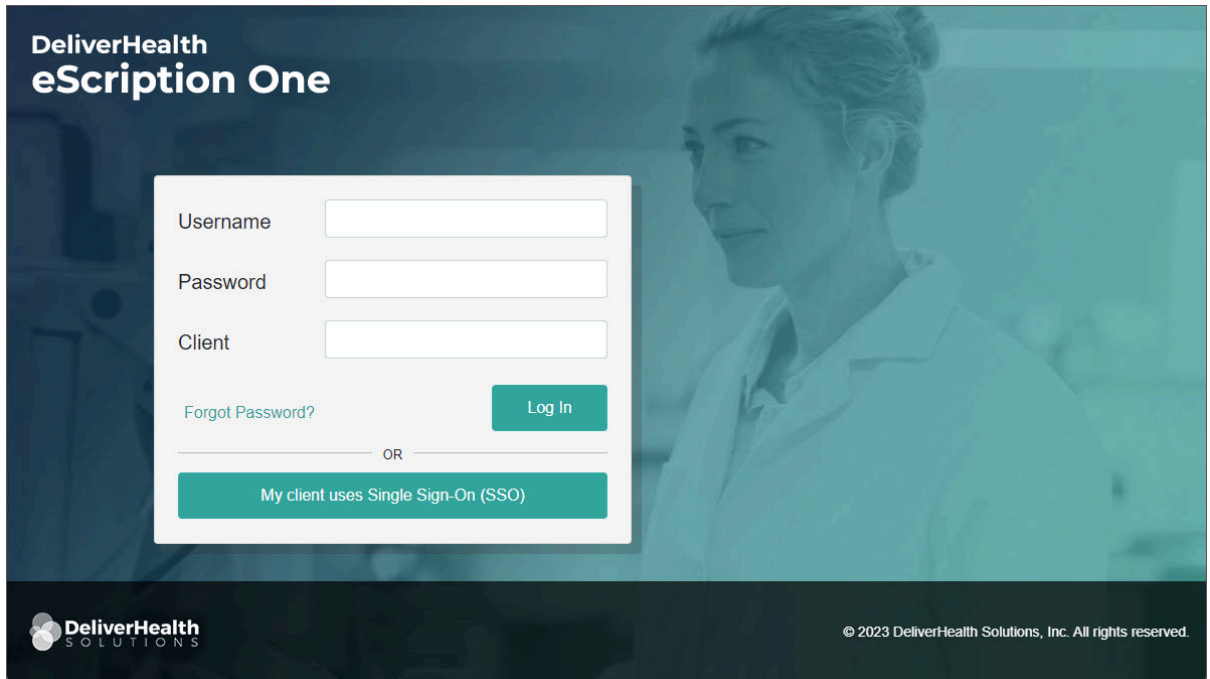
- Internet Bandwidth: 3 Mbps download; 1 Mbps upload or greater

**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 InQuery

InQuery 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 InQuery.



Navigate to the proper regional website:

**Australia** <https://www.escription-one.com.au/inquiry/> (<https://www.escription-one.com.au/inquiry/>)

**Canada** <https://www.escription-one.ca/inquiry/> (<https://www.escription-one.ca/inquiry/>)

**United States** <https://www.escription-one.com/inquiry/> (<https://www.escription-one.com/inquiry/>)

Log into InQuery with the User, Password, and Client information provided by the Transcription Company or system administrators. All three fields are required to access the InQuery 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](https://www.escription-one.com/Software/Download?fileName=eScriptOne%20SSO%20Configuration%20and%20User%20Guide.pdf) (<https://www.escription-one.com/Software/Download?fileName=eScriptOne%20SSO%20Configuration%20and%20User%20Guide.pdf>) for more details.

If multi-factor authentication (MFA) has been enabled for your client, please see [Setting up Multi-Factor Authentication](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-setting-up-multi-factor-authentication) ([http://127.0.0.1:8000/print\\_page/#inquiry-starting\\_inquiry-setting-up-multi-factor-authentication](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-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](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-email-verification) ([http://127.0.0.1:8000/print\\_page/#inquiry-starting\\_inquiry-email-verification](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-email-verification)) and [Password Reset](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-password-reset) ([http://127.0.0.1:8000/print\\_page/#inquiry-starting\\_inquiry-password-reset](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-password-reset)) .

Once successfully logged in, InQuery displays the Home tab. The navigation tabs appear along the left side of the InQuery website. These tabs are persistent throughout the InQuery 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

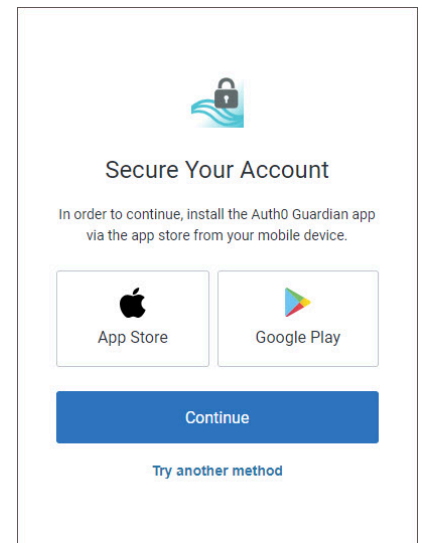
### Note

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

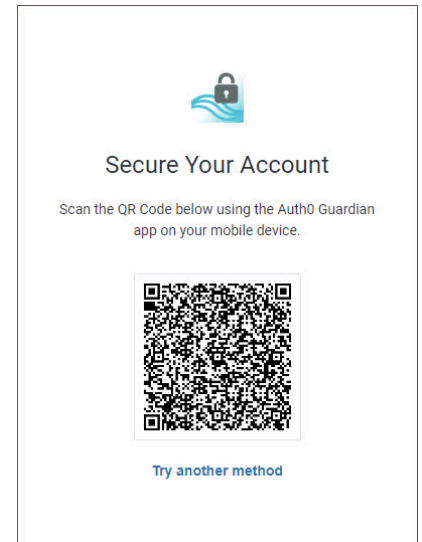
Multi-factor authentication is another way to verify a your identity, adding an extra level of security to the login process. If your client has MFA enabled there will be a one-time procedure that requires you to download an authentication application called Auth0 Guardian onto your mobile device and 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 InQuery log in page.
2. Enter your username, password, and client code and click **Log In** or press Enter.
3. Download the Auth0 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 InQuery 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 InQuery, 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 InQuery by holding your phone up to the code. This will link the authentication app to your InQuery 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 InQuery). If you need to log in and do not have your mobile device, you can paste or enter this code to access InQuery. 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 InQuery 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

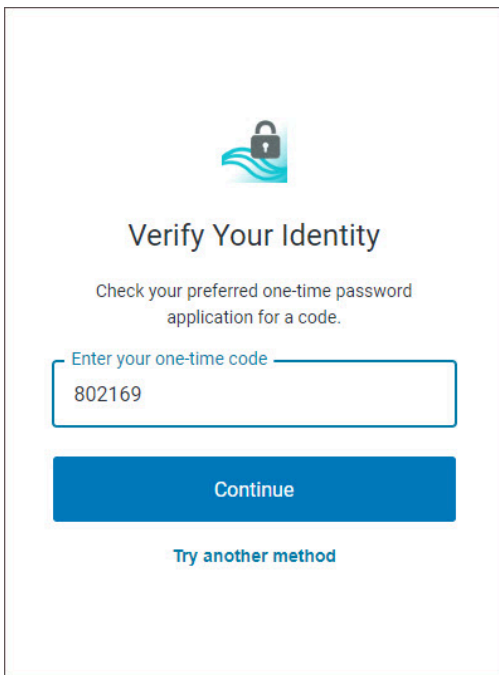
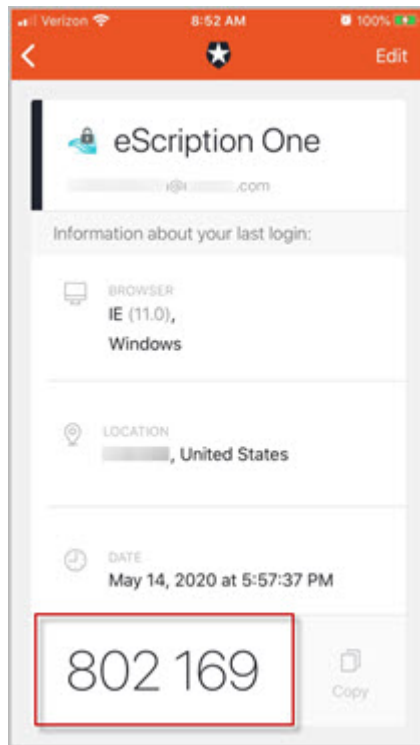
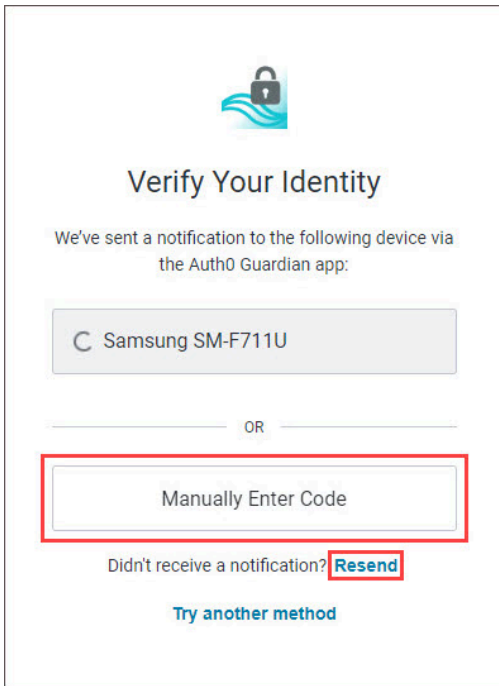
Once you have completed the initial MFA setup process above, you will subsequently log in to InQuery as shown in the steps below:

1. In InQuery, 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 InQuery.

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





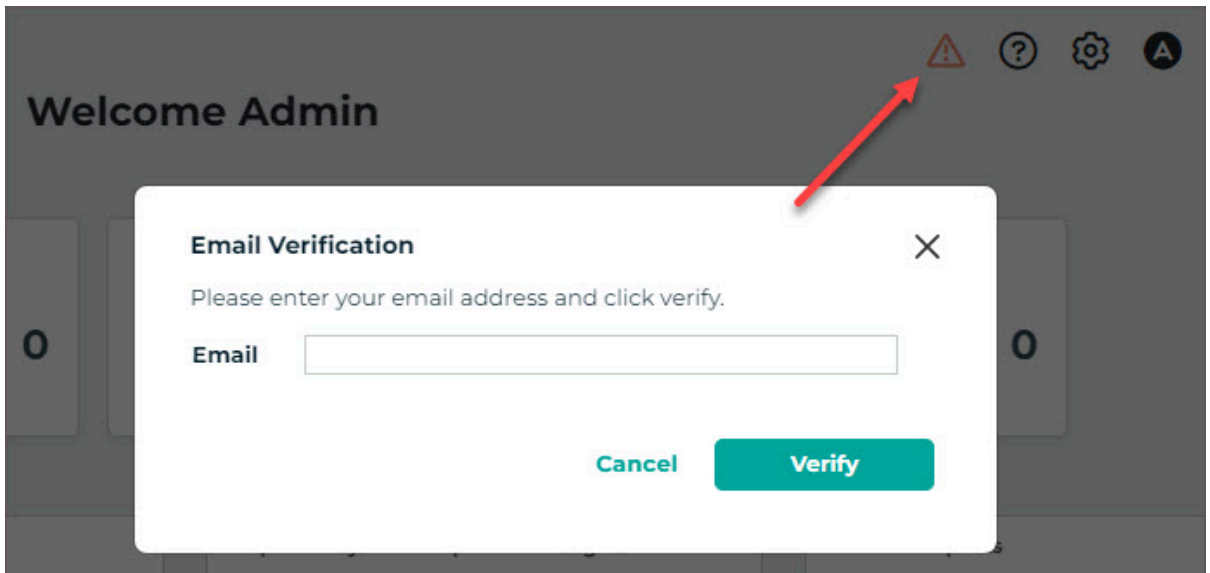
Open the Guardian app and choose your InQuery profile. Enter the code from the bottom of the Guardian app into InQuery.

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 InQuery. 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 InQuery password (see [Email Verification \(http://127.0.0.1:8000/print\\_page/#inquiry-starting\\_inquiry-email-verification\)](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-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.

Forgot Password

Username

Client

[Have reset code?](#)

Username

Password

Client

[Forgot Password?](#)

OR

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 InQuery log in page to log in with the new password.

Reset Password

Provide your new password below

Username

Client

Reset Code

New Password

Verify 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.

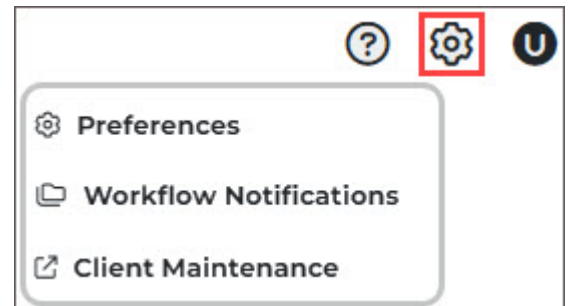
**Help Desk** - Provides contact information for support. To navigate here go to  in the upper right corner then select Help Desk.

**Phone Dictation Help** - Downloads the InTouch Telephone Dictation Instructions. To navigate here go to  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 InQuery 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.


User Preferences	
<i>Note: these features do not apply when printing from the Search Tab.</i>	
Complete All After Print All	<input checked="" type="checkbox"/>
Complete Selected After Print Selected	<input checked="" type="checkbox"/>
Popup Batch Log After Print	<input checked="" type="checkbox"/>
Print Batch Log After Print	<input checked="" type="checkbox"/>
Complete After Download	<input type="checkbox"/>
Auto Spellcheck	<input checked="" type="checkbox"/>
Auto-Refresh Search every	0 minutes
Always Maximize InQuery Windows	<input checked="" type="checkbox"/>
Always Confirm Job Completion	<input checked="" type="checkbox"/>
Password Reset Email	<input type="text"/> * <input checked="" type="checkbox"/> <b>verified</b>
Time Zone	(GMT-06:00) Central Time (US & Canada)

To navigate here go to  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 \(http://127.0.0.1:8000/print\\_page/#inquiry-starting\\_inquiry-email-verification\)](http://127.0.0.1:8000/print_page/#inquiry-starting_inquiry-email-verification) for more

information on the verification process.

The **Save** button saves changes and closes the User Preferences window. The **Cancel** and Close  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 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.

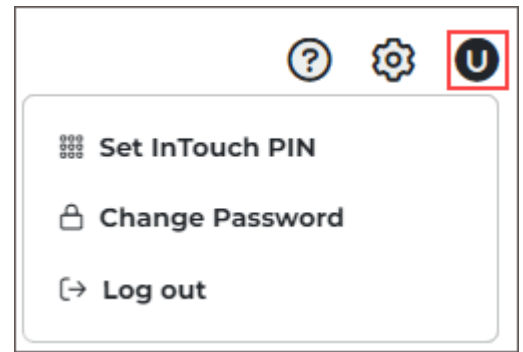
**Client Maintenance** - Opens Client Maintenance in a new browser tab and allows users to modify client setup, Associates, Patients, Documents, Users, Templates, ShadowPrint options, and other advanced features.

To navigate here go to  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.

**DeliverHealth**

**Welcome Admin**

**Workflow**

Dictations	Marked For Revi...	Marked For Revi...	Preliminary	Referral	Final	Final 2
61	4	0	6	3	9	15

**STAT: 27**

**At a glance**

**Latest News**

Welcome to InQuery. **2/10/22**  
Welcome to InQuery. Please contact client support with any questions or issues.

**Top Priority Transcriptions for Sign Off**

MOSES AYEGBA	MRN 5271040	Dictated: 5/2/2023
DERRICK WILSON	MRN 5271092	Dictated: 7/10/2023 <b>STAT</b>
NUMBERS PARKINSON	MRN 3507	Dictated: 10/4/2023
NUMBERS PARKINSON	MRN 3507	Dictated: 10/9/2023

[View All](#)

**Recent Reports**

Associate Referral Detail	2023-10-01 to 2023-10-31
Action Monitor	2023-10-01 to 2023-10-31

[View All](#)

**Dictation Stat vs Normal**

Stat	Normal
45	70

**Quick Guides**

- [Phone Dictation Instructions](#)
- [Graphical Signature Form](#)
- [InVision Column Reports Manual](#)

**Fax Summary**

Queued Faxes	0
Failed Faxes	1

## 4.1 Workflow Summary

**Workflow**

Dictations	Marked For ...	Marked For ...	Preliminary	Referral	Final	Final 2
49	6	2	46	2	6	6

**STAT: 8**

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.



## Note

The labels of workflow folders are customizable for the client and may not match what 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 InQuery. 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:

- **Latest News** - News and announcements from the Medical Transcription Services Organization (MTSO).
- **Top Priority Transcriptions for Sign Off** - Displays the four oldest transcriptions in the Preliminary folder. Click on **View All** to navigate to the Preliminary Folder. This card is only available if the user

The screenshot shows the InQuery dashboard interface. A 'Customize' dialog box is open in the center, listing several summary cards with checkboxes: Latest News, Top Priority Transcriptions for Sign Off, Recent Reports, Dictation Stat vs Normal, Quick Guides, and Fax Summary. All checkboxes are checked. The background dashboard includes a 'Welcome Admin' section, a 'Workflow' section with 'Dictations' (49) and 'Marked For ...' (6) cards, and an 'At a glance' section with 'Latest News', 'Top Priority Transcriptions for Sign Off', 'Recent Reports', 'Dictation Stat vs Normal' (a bar chart comparing 'Stat' and 'Normal' dictation times), 'Quick Guides', and 'Fax Summary'. A red arrow points to the 'Customize' button in the bottom right corner of the dashboard.

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 InQuery. The schedule view is only available to clients who provide an appointment data feed.

The screenshot shows the DeliverHealth interface for the Patients tab. On the left is a dark sidebar with navigation options: Home, Patients (selected), Scribe, Search All, Workflow, Faxes, ShadowPrint, and Reports. The main content area is titled "Patients" and features a search bar with "Filter Results" and an "Advanced Search" button. Below the search bar, it indicates "Searched for: 3/6/2024". A date selector shows "Appointment Date" set to "3/5/2024". The interface displays "Results: 10" and options for "Default Layout", "Choose Columns", and "Results per page" (set to 10). A table lists 10 appointments for 3/5/2024, with columns for Appointment Date, Patient ID, Patient Name, Gender, Birthdate, Clinician, Location, Status, and Actions. The status column contains icons: a green checkmark, a blue person icon, and a yellow warning icon. A "1" in a circle is visible at the bottom center of the table area.

Appointment Date	Patient ID	Patient Name	Gender	Birthdate	Clinician	Location	Status	Actions
3/5/2024 8:00 AM	5271025	ADRIENNE GODBOLD	F	4/17/1983	BALLOON ANGIOPLASTY OF CORONAR	East	✓	View Appointment Info   ▾
3/5/2024 8:15 AM	5271045	ADRIA CRAWFORD	F	2/1/1963	CORONARY ARTERY BYPASS GRAFT	East	👤	View Appointment Info   ▾
3/5/2024 8:30 AM	5271083	VANDER BLUE	M	4/28/2004	CARDIAC CATHETERIZATION	East	⚠	View Appointment Info   ▾
3/5/2024 8:45 AM	5271126	BRITTANY HENDERSON	F	11/16/1946	CARDIAC CATHETERIZATION	East		View Appointment Info   ▾
3/5/2024 9:00 AM	5271076	JASMINE JACKSON	F	9/20/1997	REDUCTION OF FRACTURE	East		View Appointment Info   ▾
3/5/2024 9:15 AM	5271099	APIEW OJULU	F	8/11/1941	CORONARY ARTERY BYPASS GRAFT	East		View Appointment Info   ▾
3/5/2024 9:30 AM	5271072	KIAH STOKES	F	5/21/1993	TOTAL HIP REPLACEMENT	East		View Appointment Info   ▾
3/5/2024 9:45 AM	5271067	LAUREN ENGLN	F	12/5/1988	ENDOSCOPY OF SMALL INTESTINE	East		View Appointment Info   ▾
3/5/2024 10:00 AM	5271035	HENRY SIMS	M	4/15/1953	DIAGNOSTIC ULTRASOUND	East		View Appointment Info   ▾
3/5/2024 10:15 AM	5271174	CHARLES MCKINNEY	M	11/4/1994	ENDOSCOPY OF SMALL INTESTINE	East		View Appointment Info   ▾

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

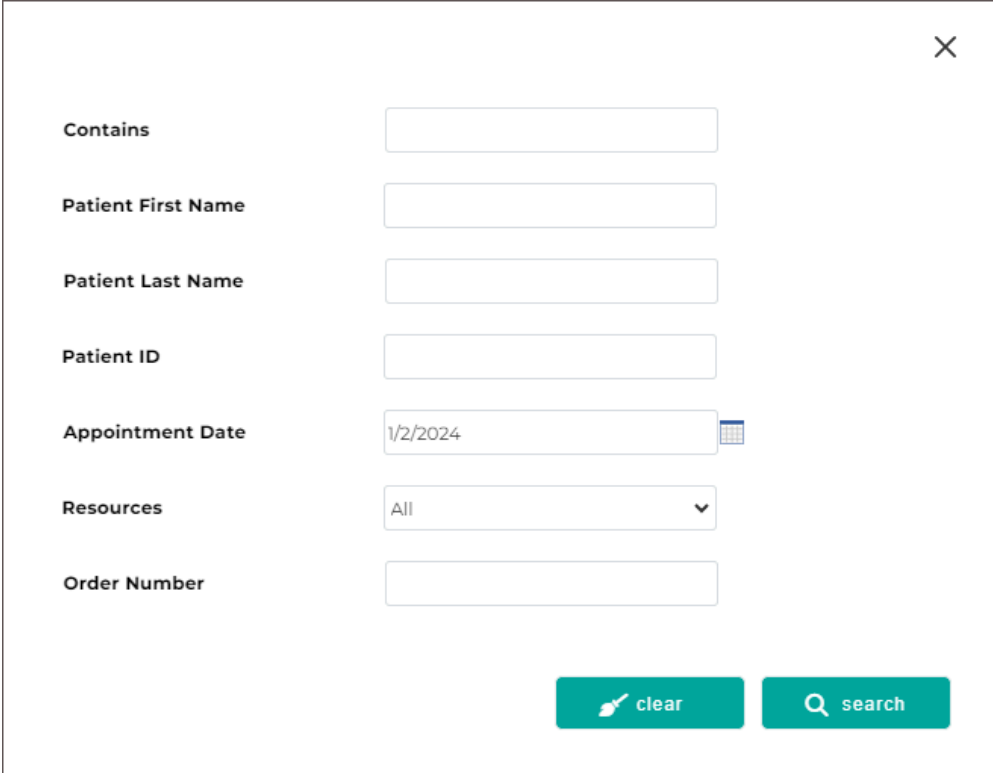
To find a particular patient appointment, enter filter criteria in the filter box and press Enter or click .

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 Derk" 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 or partial appointment order number.



The screenshot shows a modal window titled "Advanced Search" with a close button (X) in the top right corner. The window contains several search criteria fields:

- Contains**: A text input field.
- Patient First Name**: A text input field.
- Patient Last Name**: A text input field.
- Patient ID**: A text input field.
- Appointment Date**: A date picker field showing "1/2/2024" with a calendar icon.
- Resources**: A dropdown menu with "All" selected and a downward arrow.
- Order Number**: A text input field.

At the bottom right of the window, there are two buttons: a teal button with a white eraser icon and the text "clear", and a teal button with a white magnifying glass icon and the text "search".

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.

#### Tip

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.

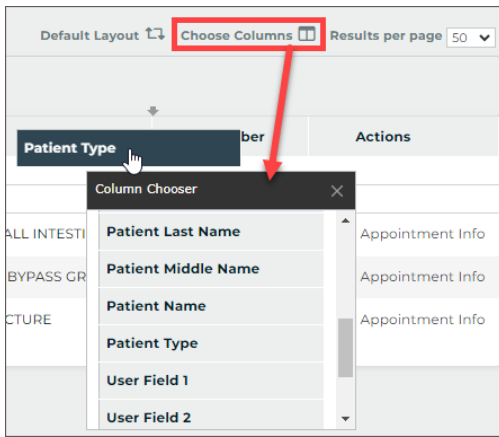
## 5.2 Patients Data Grid

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

The screenshot shows a web interface for viewing patient appointments. At the top, there is a search bar with 'Filter Results' (1) and 'Advanced Search' (2) buttons. Below it, the search criteria 'Searched for: 3/5/2024' (3) is displayed. A date selector for 'Appointment Date' (5) is set to 3/5/2024. The results count is 'Results: 10' (6), with a refresh button (7). There are buttons for 'Default Layout' (8) and 'Choose Columns' (9). The results are grouped by 'Location' (11), with 'Hospital (3)' (13) and 'East (7)' (14) options. The main table has columns: Appointment Date, Patient ID, Patient Name, Gender, Birthdate, Appt Reason, Appt Order #, Status, and Actions. The status column shows icons for 'On-time' (15), 'Delayed' (16), and 'Cancelled' (17). A 'Record' button (18) is highlighted in a red box. A pagination control shows '1' (19) records per page.

Appointment Date	Patient ID	Patient Name	Gender	Birthdate	Appt Reason	Appt Order #	Status	Actions
Location: Hospital (3)								
Location: East (7)								
3/5/2024 8:00 AM	5271025	ADRIENNE GODBOLD	F	4/17/1983	BALLOON ANGIOPLASTY OF CORONAR	08005271025	On-time	View Appointment Info
3/5/2024 8:15 AM	5271045	ADRIA CRAWFORD	F	2/1/1963	CORONARY ARTERY BYPASS GRAFT	08155271045	On-time	View Appointment Info
3/5/2024 9:00 AM	5271076	JASMINE JACKSON	F	9/20/1997	REDUCTION OF FRACTURE	0901076527	On-time	View Appointment Info
3/5/2024 8:30 AM	5271083	VANDER BLUE	M	4/28/2004	CARDIAC CATHETERIZATION	0835271083	Delayed	View Appointment Info
3/5/2024 9:15 AM	5271099	APIEW OJULU	F	8/11/1941	CORONARY ARTERY BYPASS GRAFT	09151099527	On-time	View Appointment Info
3/5/2024 8:45 AM	5271126	BRITTANY HENDERSON	F	11/16/1946	CARDIAC CATHETERIZATION	08455271126	On-time	View Appointment Info
3/5/2024 10:15 AM	5271174	CHARLES MCKINNEY	M	11/4/1994	ENDOSCOPY OF SMALL INTESTINE	0305	Cancelled	View Appointment Info

- 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.

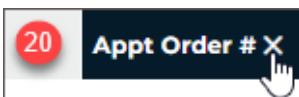


A recorded dictation for this appointment has been successfully uploaded from this device.


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  to display an additional option.



### 5.3.1 View Appointment Info

The default action in 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.

**View Appointment** ✕

Appointment ID	f7ab9c64-8e9d-4d38-b70f-c25aac19f51e	Employer	CC
Patient ID	5271083	User Field 2	CARDIAC CATHETERIZATION
Patient Name	VANDER BLUE	User Field 3	
Appt Reason	CARDIAC CATHETERIZATION	User Field 4	W14
Location	East	User Field 5	
Appointment Date	3/05/2024 8:30 AM	Facility	
Account Number	OR252710830305	Floor	
Resource ID	OR2	Room	
Appt Order #	0835271083	Bed	
Admit Date	3/05/2024 8:30 AM	Patient Class	W14
Discharge Date		Patient Type	

Cancel

### 5.3.2 InQuery Dictation

Dictations can be recorded and uploaded directly from InQuery. 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

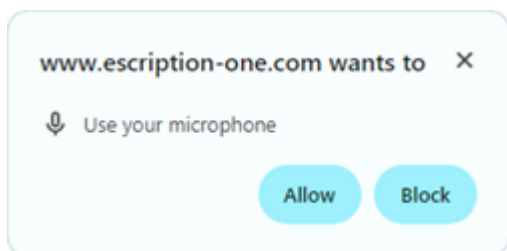
**New Dictation**

Patient ID: 5271080  
Patient Name: ALEXA ROCHE  
Appointment Date: 3/06/2024 8:00 AM  
Document Type: Chart  
Location: East  
STAT:

Start Stop Play Delete

0:00 / 0:00

On Hold Cancel Complete



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.

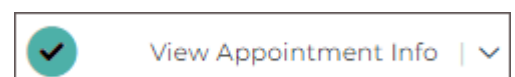
The **Stop** ■ buttons become active when recording or playback begins. Press either button to stop recording. Recording can be resume by pressing either record button. Additional dictation will always append to the end of the recording.

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 InQuery on this device.



An uploaded dictation cannot be played back from the Patients tab. Navigate to the Dictations folder in the InQuery 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.

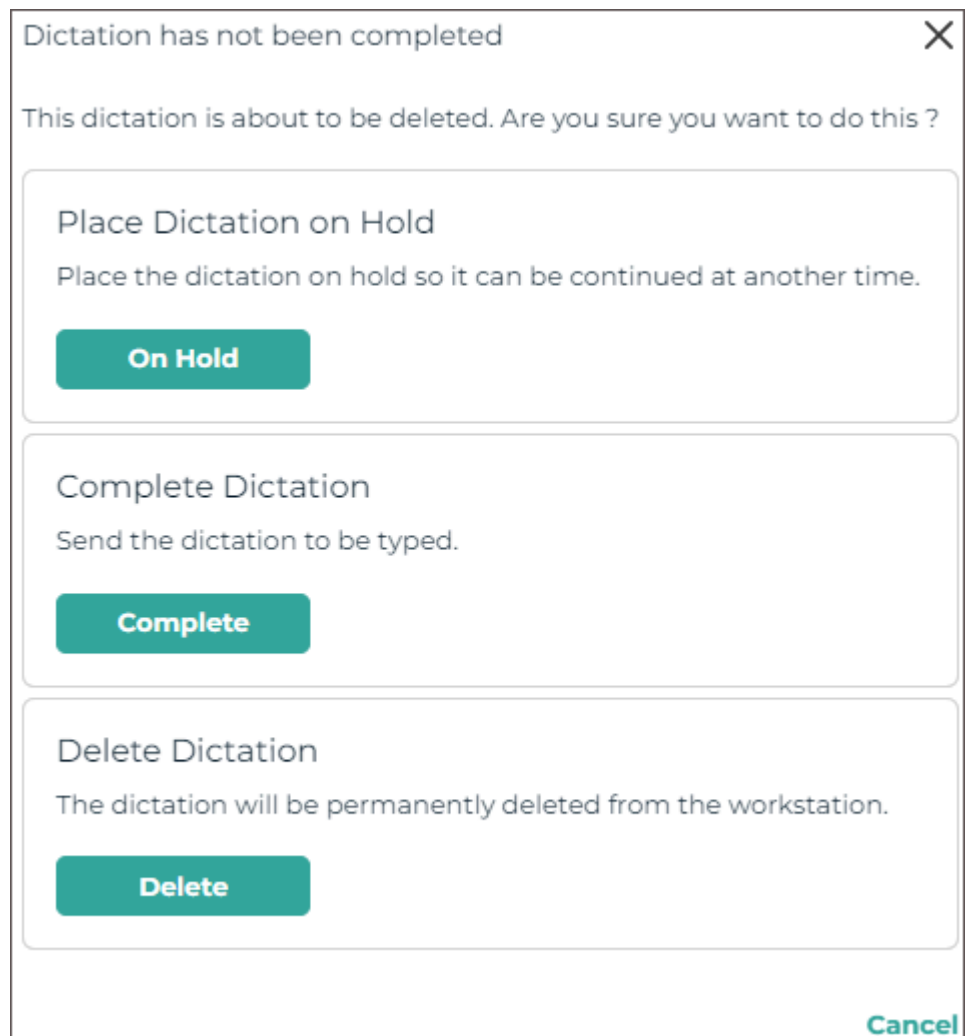


The left navigation menu will also have a yellow dot to indicate there is at least one dictation on hold in the Patients tab.

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 on-hold 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

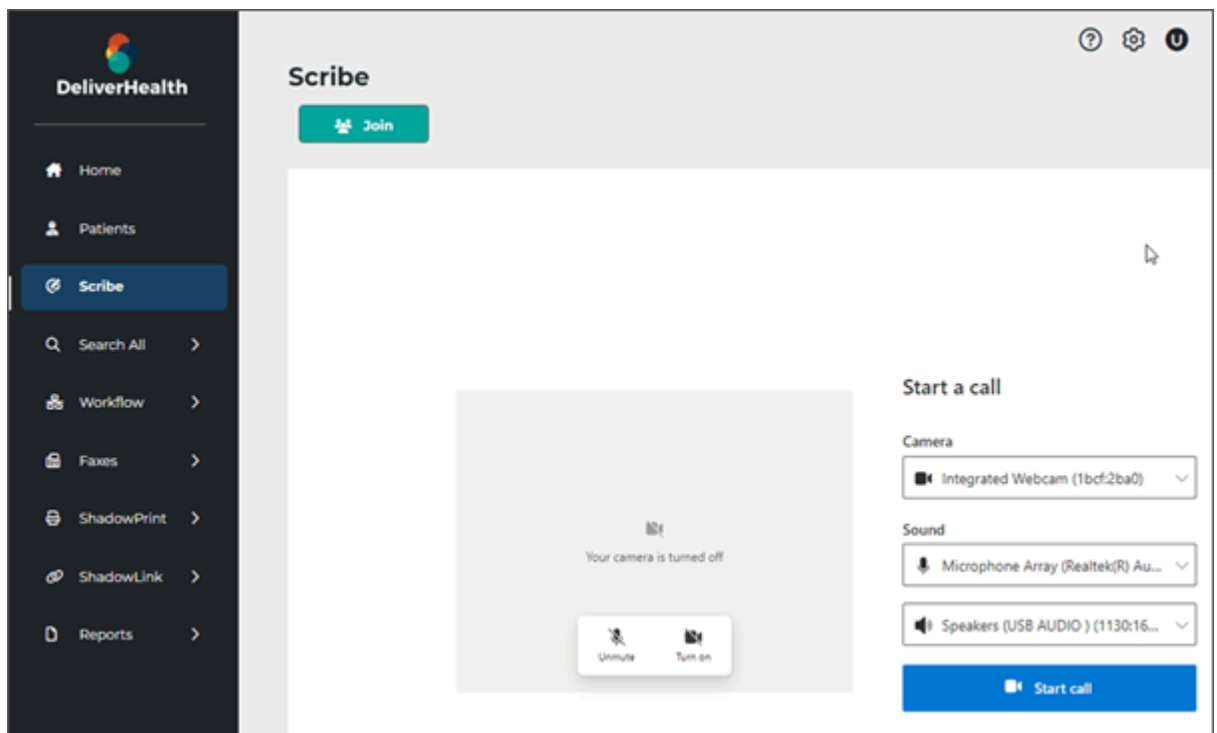
To create a virtual Sync Scribe room, click on the **Join** button. The call settings will load prior to the room opening.

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.



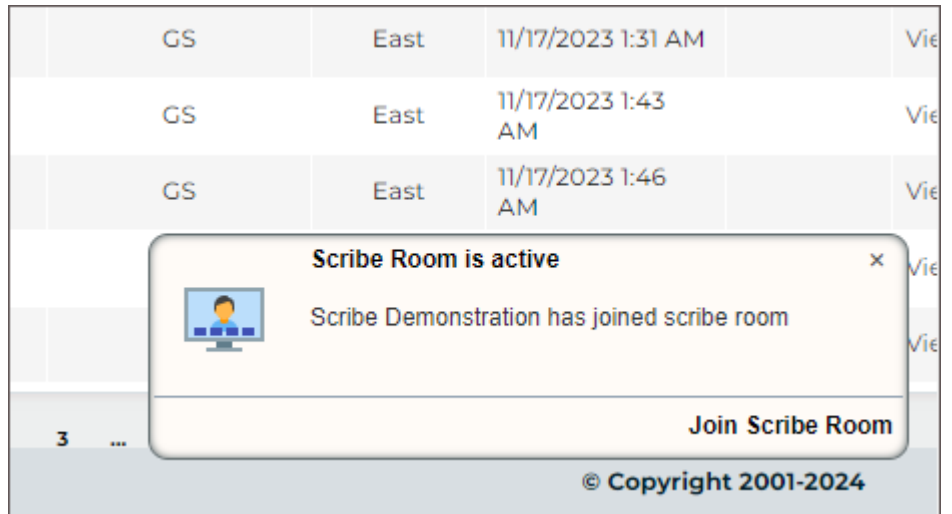
### Tip

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

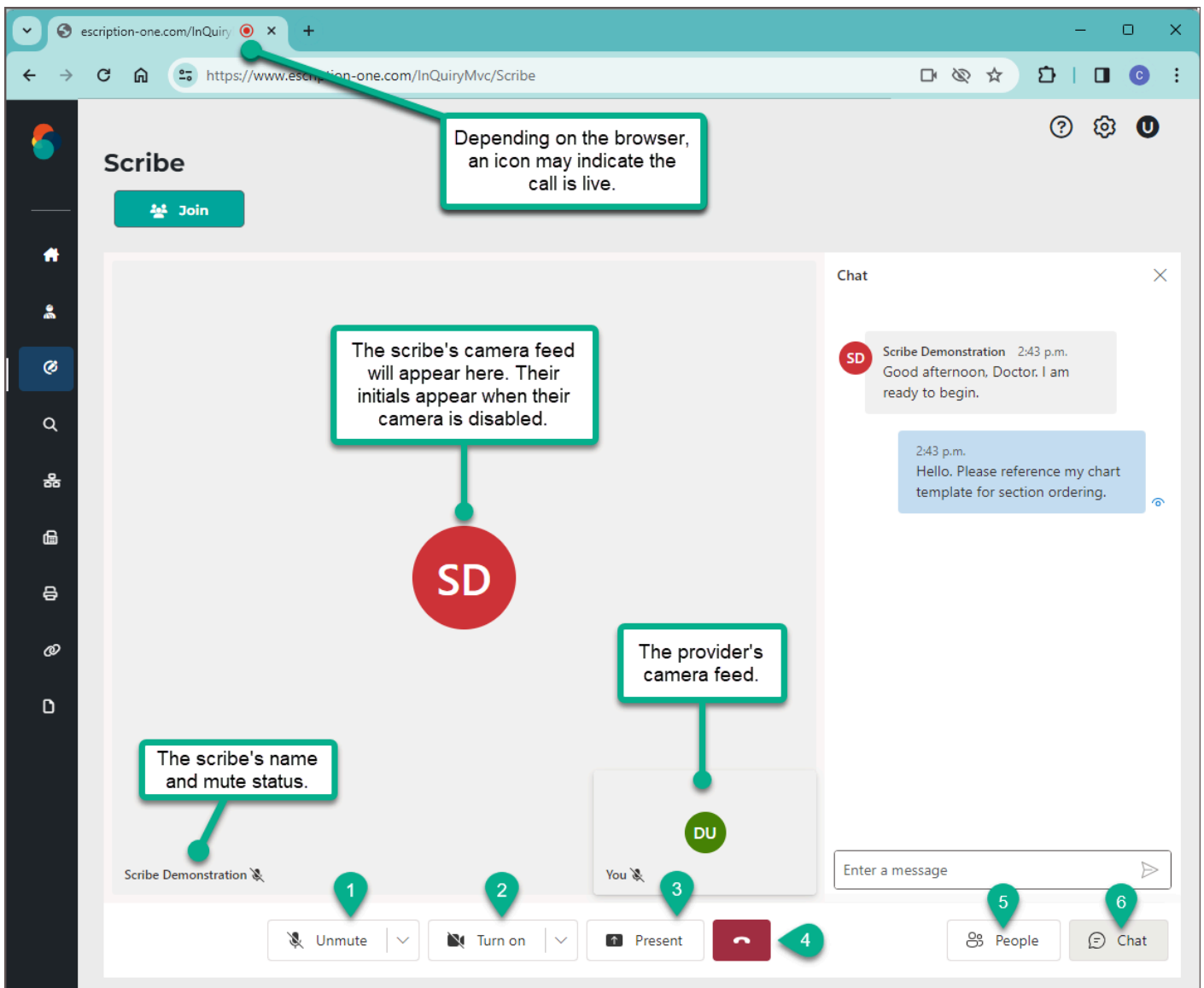
Multiple scribes may join the scribe room, but only one provider can join. If a scribe begins the call before the provider, the provider will receive a pop-up notification in InQuery, similar to report notifications, stating the scribe room has been opened and by whom. This notification is only presented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



## 1 Microphone Controls

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

## 2 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.

**5 People** Click to view a list of room participants.

- The participant list will replace the chat feed. Click Chat to return to the feed.

**6 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.

	Patient Name	Appt Reason	Authenticator	Document Type	Location	Date Dictated	Order Number	Comments	Actions
<input type="checkbox"/>	ANA MARTIN	Demonstration User	Demonstration User	Cover	East	1/5/2024 3:02 PM			Dictations   v
<input type="checkbox"/>	LINE BADER	Demonstration User	Demonstration User	Structur	East	1/5/2024 12:07 PM	1		Preliminary   v
<input type="checkbox"/>	RESS CLLUNG	Demonstration User	Demonstration User	Chart	East	1/5/2024 10:45 AM			Dictations   v
<input type="checkbox"/>	5271143 DARESS MCCLUNG	Demonstration User	Demonstration User	Chart	East	1/5/2024 10:44 AM			Dictations   v
<input type="checkbox"/>	5271092 DERRICK WILSON	Demonstration User	Demonstration User	Consult	East	1/5/2024 10:42 AM			Dictations   v
<input type="checkbox"/>	5271092 DERRICK WILSON	Demonstration User	Demonstration User	Consult	East	1/5/2024 10:42 AM			Dictations   v
<input type="checkbox"/>		User Ltest	User Ltest	Graph	Texas	1/5/2024 9:26 AM			Dictations   v
<input type="checkbox"/>		Attending Doctor	Attending Doctor	Exam	South West	1/5/2024 9:06 AM		●	Marked For Review   v
<input type="checkbox"/>		Attending Doctor	Attending Doctor	Exam	South West	1/5/2024 9:06 AM		●	Marked For Review 2   v
<input type="checkbox"/>	5271059 ROSCOE SMITH	Demonstration User	Demonstration User	Chart	East	1/5/2024 9:04 AM			Dictations   v

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.

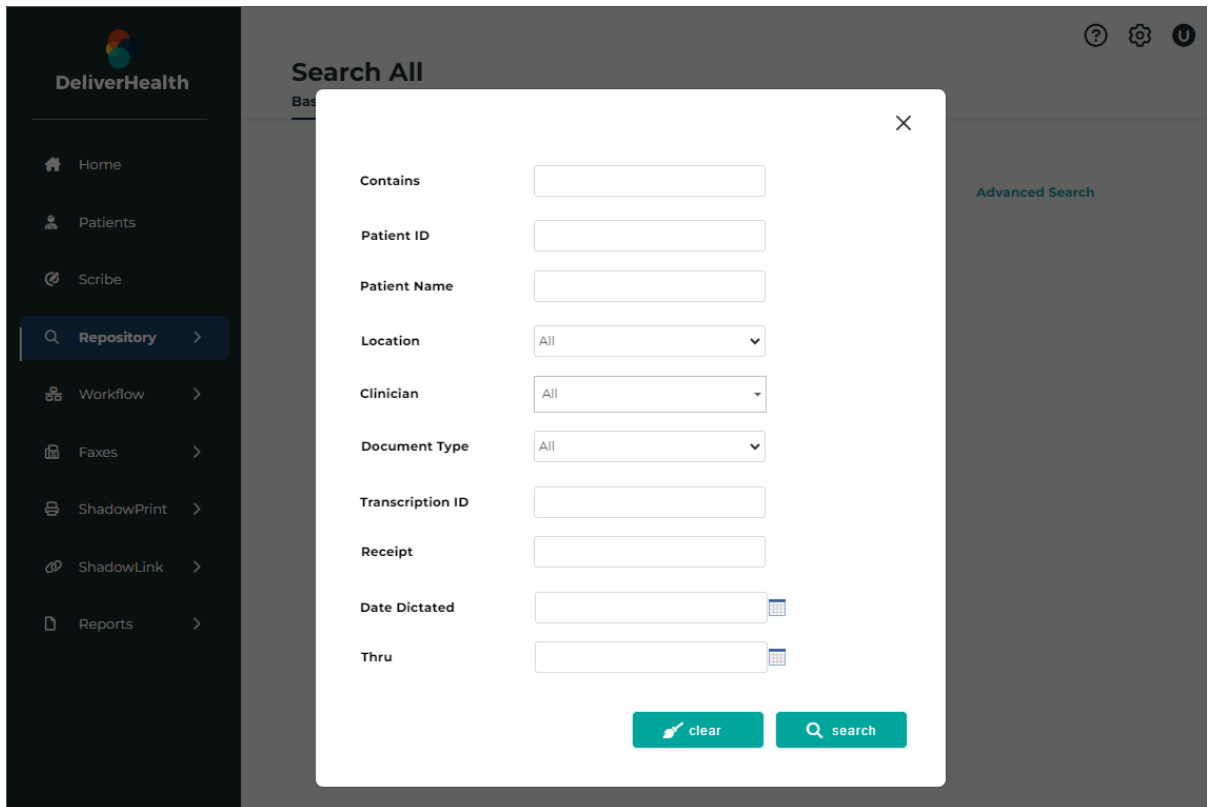
- **Basic Search:** Search for transcriptions in any stage of the workflow or Search All repository.
- **Invalidated:** Search for transcriptions that have been removed from the workflow or "deleted." By default, users do not have access to this sub-tab.
- **Faxes:** Opens the Manage Faxes tab. Search 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 \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-data-grid\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-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 \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-filter-search-results\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-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

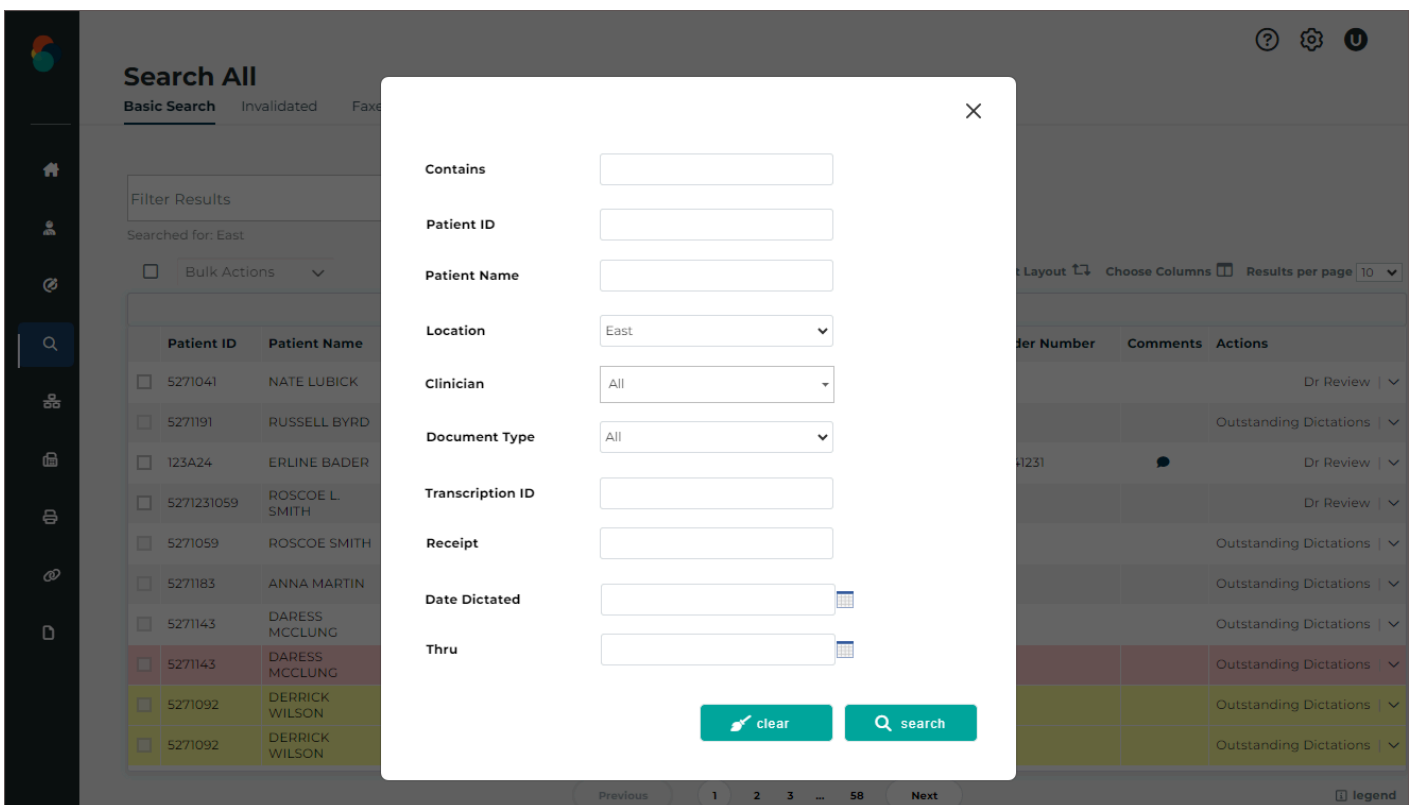
alphanumeric and special characters, including spaces, apostrophes, and parentheses. Both first and last names are searched.

- **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.



**Search All**  
Basic Search   Invalidated   Faxes

123 Advanced Search

Searched for: East

Bulk Actions   **Results: 66**   Default Layout   Choose Columns   Results per page 10

Drag a column header here to group by that column

Patient ID	Patient Name	Clinician	Authenticator	Document Type	Order Number	Location	Date Dictated	Comments	Actions
<input type="checkbox"/> 13272	Samuel Stalgis	Demonstration User	Demonstration User	Chart	12345	East	11/29/2017 12:28 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 123123	Welcome to Emdat	Demonstration User	Demonstration User	Chart	54321	East	6/2/2016 9:00 AM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 123123	Welcome to Emdat	Demonstration User	Demonstration User	Chart	54321	East	6/22/2016 10:53 AM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 123123	Welcome to Nuance	Three Hamming	Three Hamming	Chart	54321	East	3/1/2019 1:05 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 13552	Wallace, Astrid	Johnsen Resident	John Hansard	Exam	123	East			Final   <input type="checkbox"/>
<input type="checkbox"/> 123	123FirstName 123LastName	Johnsen Resident	John B. Hansard	Chart		East			Final 2   <input type="checkbox"/>
<input type="checkbox"/> 867	Melissa Lindfield Seager	Nuance Jacoby	Nuance Jacoby	Consult	123456789123456789	East			Search All   <input type="checkbox"/>
<input type="checkbox"/> 13552	Astrid Wallace	Jane Doe	John Hansard	Chart	123	East	3/16/2010 12:47 AM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 123abc	Jacquelyn Anders	Crystal Howard	Crystal Howard	Exam		East	10/5/2010 6:41 AM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 1234	Test Patient	Crystal Howard	John Hansard	Exam	TP111011	East	11/10/2011 2:14 PM		Search All   <input type="checkbox"/>

Previous 1 2 3 ... 7 Next Legend

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.

**Search All**  
Basic Search   Invalidated   Faxes

"Order Number":"123" Advanced Search

Searched for: East

Bulk Actions   **Results: 40**   Default Layout   Choose Columns   Results per page 10

Drag a column header here to group by that column

Patient ID	Patient Name	Clinician	Authenticator	Document Type	Order Number	Location	Date Dictated	Comments	Actions
<input type="checkbox"/> 13272	Samuel Stalgis	Demonstration User	Demonstration User	Chart	12345	East	11/29/2017 12:28 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 13552	Wallace, Astrid	Johnsen Resident	John Hansard	Exam	123	East			Final   <input type="checkbox"/>
<input type="checkbox"/> 867	Melissa Lindfield Seager	Nuance Jacoby	Nuance Jacoby	Consult	123456789123456789	East			Search All   <input type="checkbox"/>
<input type="checkbox"/> 13552	Astrid Wallace	Jane Doe	John Hansard	Chart	123	East	3/16/2010 12:47 AM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 1	Test Patient	Crystal Howard	John Hansard	Exam&#	123	East	8/7/2012 3:53 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 12345	Larseny, Bethany	Crystal Howard	John Hansard	Ch#art&	123755	East	9/25/2012 3:52 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 12345	Larseny, Bethany	Crystal Howard	John Hansard	Ch#art&	123755	East	9/25/2012 3:52 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> CW0311944	Callista White	Hansard, John	Hansard, John	SumEA	123	East	10/15/2012 9:40 AM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 12345	Larseny, Bethany	John Hansard	John Hansard	Consult	123755	East	11/18/2012 8:52 PM		Search All   <input type="checkbox"/>
<input type="checkbox"/> 12345	Larseny, Bethany	Crystal Howard	Crystal Howard	ClinNote	123755	East	3/14/2013 2:23 PM		Search All   <input type="checkbox"/>

Previous 1 2 3 4 Next Legend

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.

**Search All**  
Basic Search   Invalidated   Faxes

"Order Number":123 "Document Type":Chart Mel   **Advanced Search**

Searched for: East

Bulk Actions   **Results: 3**   Default Layout   Choose Columns   Results per page 10

Drag a column header here to group by that column

Patient ID	Patient Name	Clinician	Authenticator	Document Type	Location	Date Dictated	Order Number	Comments	Actions
<input type="checkbox"/> 867	Melissa Lindfield Seager	Demonstration User	Demonstration User	Chart	East	4/17/2014 12:00 AM	123456789123456789		Search All   ▾
<input type="checkbox"/> 867	Melissa Lindfield Seager	Demonstration User	Demonstration User	Chart	East	4/17/2014 12:00 AM	123456789123456789		Search All   ▾
<input type="checkbox"/> 1516	Melanie Upton	Demonstration User	Demonstration User	Chart	East	1/14/2014 11:45 AM	12345		Search All   ▾

1   legend

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.

**Search All**  
Basic Search   Invalidated   Faxes

"Order Number":123 "Document Type":Chart Mel   **Advanced Search**

Searched for: East

Bulk Actions   **Results: 4**   Default Layout   Choose Columns   Results per page 10

Drag a column header here to group by that column

Patient ID	Patient Name	Clinician	Authenticator	Document Type	Location	Date Dictated	Order Number	Comment	Comments	Actions
<input type="checkbox"/> 1	ERLINE BADER	Demonstration User	Demonstration User	Chart	East	1/6/2024 5:07 AM	854123	Prior insurance policy group was 384-Mel-98		Preliminary   ▾
<input type="checkbox"/> 867	Melissa Lindfield Seager	Demonstration User	Demonstration User	Chart	East	4/17/2014 12:00 AM	123456789123456789			Search All   ▾
<input type="checkbox"/> 867	Melissa Lindfield Seager	Demonstration User	Demonstration User	Chart	East	4/17/2014 12:00 AM	123456789123456789			Search All   ▾
<input type="checkbox"/> 1516	Melanie Upton	Demonstration User	Demonstration User	Chart	East	1/14/2014 11:45 AM	12345			Search All   ▾

1   legend

### 7.1.3 Data Grid

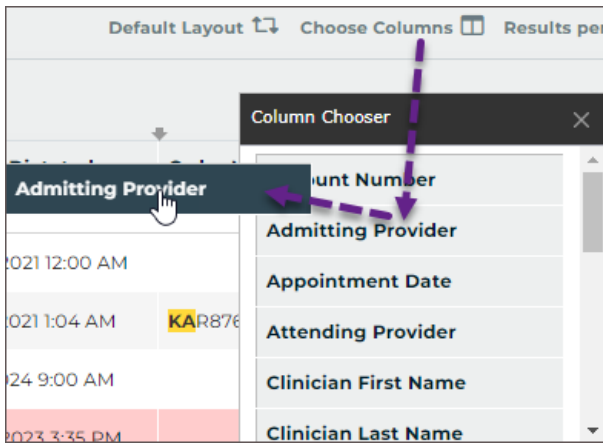
The data grid displays transcriptions that match the search criteria and can be customized by changing the included fields, grouping, sorting, and how many results are displayed on each page. Actions can be taken for individual transcriptions or in bulk by selecting multiple or all transcriptions.

The screenshot shows the 'Search All' interface with the following callouts:

- 1: Bulk Actions dropdown
- 2: Filter icon
- 3: Results: 10
- 4: Refresh button
- 5: Default Layout button
- 6: Refresh button
- 7: Results per page dropdown (set to 25)
- 8: Location filter dropdown (set to East)
- 9: Filter icon
- 10: Filter icon
- 11: Filter icon
- 12: Filter icon
- 13: Filter icon
- 14: Location filter dropdown (set to Hospital)
- 15: Filter icon
- 16: expand all button
- 17: collapse all button
- 18: legend button

	Patient ID	Patient Name	Clinician	Authenticator	Document Type	Date Dictated	Order Number	Comments	Actions
Location: East (5)									
<input type="checkbox"/>	5271135	JESSI KA LARK	Demonstration User	Demonstration User	Chart	3/18/2021 12:00 AM			Search All
<input type="checkbox"/>	5271135	JESSI KA LARK	Demonstration User	Demonstration User	Chart	3/12/2021 1:04 AM	KA R87630		Search All
<input type="checkbox"/>	5271177	KA RIMA GABRIEL	Demonstration User	Demonstration User	Chart	1/5/2024 9:00 AM			Dictations
<input type="checkbox"/>	5271177	KA RIMA GABRIEL	Demonstration User	Demonstration User	Chart	3/14/2023 3:35 PM			Search All
<input type="checkbox"/>	5271027	LANA RUKA VINA	Demonstration User	Demonstration User	Chart	5/3/2023 12:25 AM			Preliminary
Location: Hospital (2)									
Location: West (2)									
<input type="checkbox"/>	5271135	JESSI KA LARK	Demonstration User	Demonstration User	Chart	3/22/2021 12:00 AM			Search All
<input type="checkbox"/>	5271104	KA TIO YOUNG	Demonstration User	Demonstration User	Chart	2/16/2014 6:06 PM			Search All

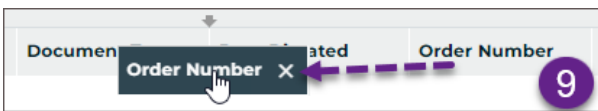
- Filter Results** - Allows filters to be applied to data in the grid. Columns with the matching data must be in the grid to match the filter. See [Filter Search Results \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-filter-search-results\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-filter-search-results) for more details.
- Advanced Search** - Opens the Advanced Search window to specify search criteria. See [Building a Search \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-building-a-search\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-building-a-search) for more details.
- 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.
- Bulk Actions** - Choose an action to apply to selected transcriptions. See [Actions \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-actions\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-actions) for more information.
- Results** - Displays a count of matching appointment records.
- Refresh** - The refresh button performs the same search again.
- Default Layout** - Resets the data grid to the default layout, removing any changes previously made to the included columns, grouping, and sorting.
- 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.



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](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-comments) (http://127.0.0.1:8000/print\_page/#inquiry-inq\_search\_all-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 [Actions](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-search_all_actions) (http://127.0.0.1:8000/print\_page/#inquiry-inq\_search\_all-search\_all\_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](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-legend) (http://127.0.0.1:8000/print\_page/#inquiry-inq\_search\_all-legend) for more information.

## Comment vs Comments

The **Comments** column is in the default grid layout and displays an icon when a transcription has a comment and/or comment tag. The icon can be clicked to open the comment/tags window.

The **Comment** column can be added to the grid and will display the comment text, but not comment tags.

Comment	Comments
Corrections made as dictated in TID 301670505	
Referral name is unclear.	
Corrections made as dictated in TID 301729341	




### 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.

Legend		X
<b>pink bar</b>	Stat Transcription	
<b>colored text</b>	Transcription came from Review folder	
<b>colored text</b>	Transcription has Non-AutoFax Associate	
<b>colored text</b>	Transcription of the <b>Inpatient</b> Document Group	


### 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.
-  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.

Transcription ID	Patient ID	Patient Name	Clinician	Authenticator	Document Type	Location	Date Dictated	Order Number	Comment	Comments	Actions
306756903	5271059	ROSCOE L. SMITH	Demonstration User	Demonstration User	Chart	East	1/6/2024 2:04 AM				Preliminary   

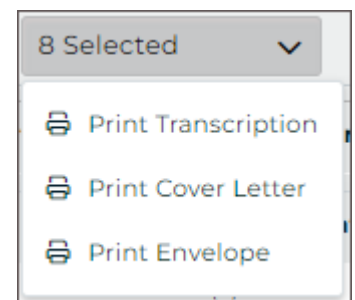
-  Play
-  Preview Transcription
-  Print Transcription


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  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.



 **Note**

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](http://127.0.0.1:8000/print_page/#printing_agent) ([http://127.0.0.1:8000/print\\_page/#printing\\_agent](http://127.0.0.1:8000/print_page/#printing_agent)) .

## 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](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-basic-search) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-basic-search](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-basic-search)) for details on how to build a search. Search results will be displayed in the data grid.

### 7.2.1 Invalidated Actions

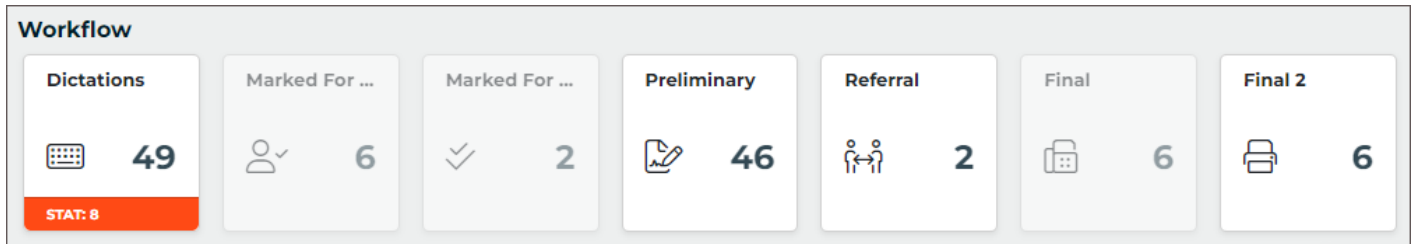
The Actions column of the data grid will display one of two statuses:

- **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](http://127.0.0.1:8000/print_page/#inquiry-inq_faxes) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_faxes](http://127.0.0.1:8000/print_page/#inquiry-inq_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.

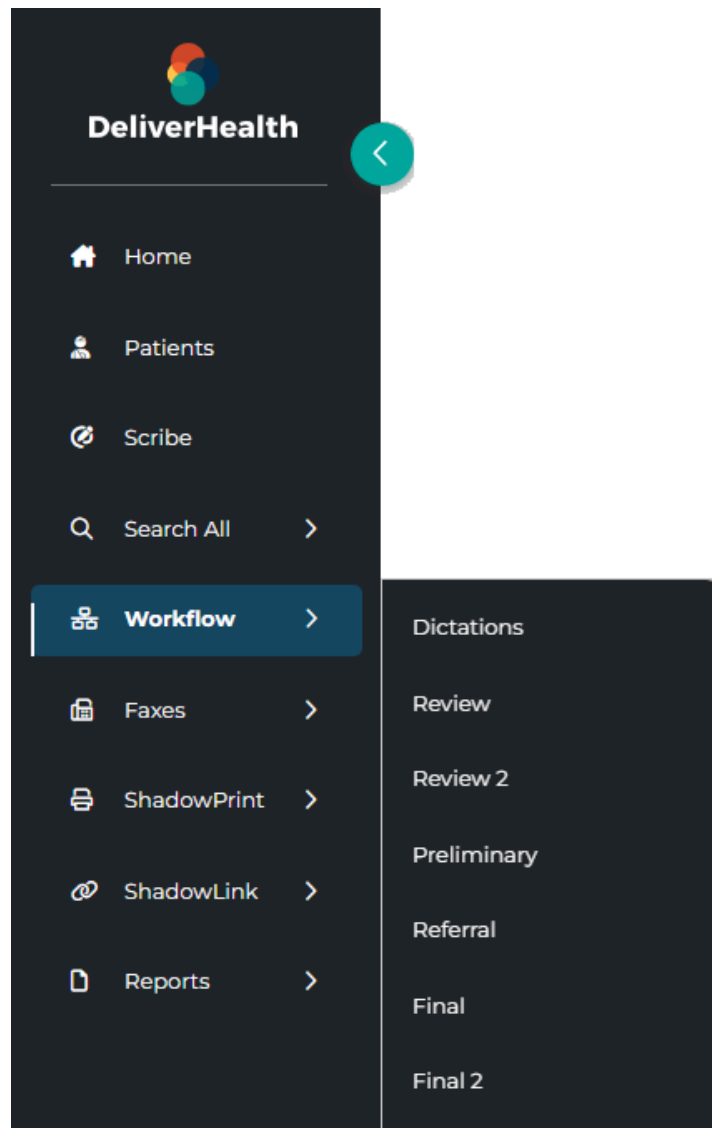
The Dictation status folder is always active, but all other folders in the workflow may not be in use by the client or can be made unavailable to specific users. Folders that are not in use or the user does not have access to cannot be opened and are gray-out in the Workflow Summary. The names of the 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:

1. Dictations - The dictation is going through the document creation workflow and is not yet available for review.
2. 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 \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-refining-workflow-folder-lists\)](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-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](#) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_tran\\_editor](http://127.0.0.1:8000/print_page/#inquiry-inq_tran_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](#) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-workflow-actions](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-workflow-actions)) for more details on available actions.

## 8.1 Workflow Folders

The screenshot displays the 'Workflow' dashboard. At the top, there are seven workflow folders: Dictations (49, STAT: 11), Review (7), Review 2 (8), Preliminary (54), Referral (2), Final (6), and Final 2 (7). Below the folders is an 'Advanced Search' toggle and a 'Filter Results' search bar. A 'Bulk Actions' dropdown is visible above the table. The table shows 49 results with columns for Patient ID, Patient Name, Clinician, Document Type, Location, Date Dictated, Date Received, Receipt, and Actions. The first six rows are highlighted in pink, indicating they are in STAT status. The remaining rows are highlighted in yellow.

Patient ID	Patient Name	Clinician	Document Type	Location	Date Dictated	Date Received	Receipt	Actions
		Nathan V. Jacoby	NuProg	East	2/16/2014 6:04 PM	12/20/2023 9:30 AM	4765069	Remove STAT
		Nathan V. Jacoby	NuProg	East	2/16/2014 6:04 PM	12/20/2023 9:30 AM	4765081	Remove STAT
		Nathan V. Jacoby	NuProg	East	2/16/2014 6:04 PM	12/20/2023 9:30 AM	4765090	Remove STAT
		Nathan V. Jacoby	NuProg	East	2/16/2014 6:05 PM	12/20/2023 9:30 AM	4765104	Remove STAT
		Nathan V. Jacoby	NuProg	East	2/16/2014 6:05 PM	12/20/2023 9:30 AM	4765112	Remove STAT
		Demonstration User	Consult	Hospital	12/8/2023 3:59 PM	12/8/2023 3:59 PM	34257555	Remove STAT
		Hank Harper	Consult	East	11/17/2023 6:52 PM	11/27/2023 8:25 PM	32167942	Make STAT
13553	Jill Carrington	Nathan V. Jacoby	Letter	Main	6/26/2013 2:06 PM	1/29/2016 12:54 PM	17750764	Make STAT
		Nathan V. Jacoby	Consult	East	11/9/2023 3:06 PM	11/9/2023 3:06 PM	31354361	Make STAT
		Nathan V. Jacoby	NuProg	East	11/20/2023 1:39 PM	11/20/2023 1:40 PM	32449182	Make STAT

### 8.1.1 Dictation Status

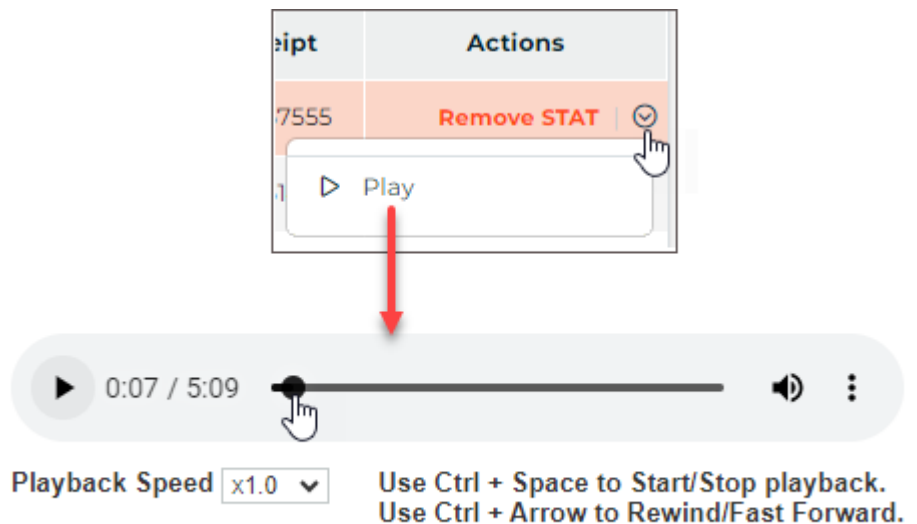
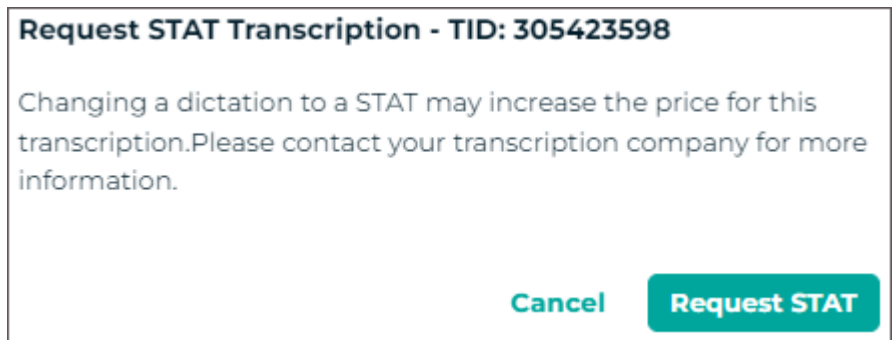
Transcriptions in the Dictation Status folder have recently been uploaded to the transcription company and have not been delivered as completed documents. Two actions can be performed on dictations that are in the Dictation Status workflow folder.

- **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 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 InQuery 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. The 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.

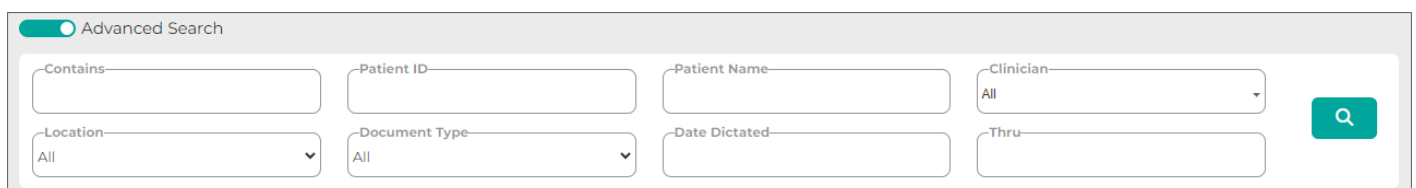
After transcriptions are completed from the last workflow folder they will only be found in the [Repository \(Search All\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all)).

## 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 be 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 \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-filter-results\)](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-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.

 **Note**

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.

**Workflow**

Dictations: 29 (STAT: 8) | Review: 31 | Review 2: 23 | **Preliminary: 45** (Total notes in folder) | Referral: 3 | Final: 4 | Final 2: 0

Advanced Search:

Search filters: Contains, Patient ID, Patient Name, Clinician (All), Location (East), Document Type (All), Date Dictated, Thru

Location: East (Filter Chip) | Results: 40 (Total notes matching search criteria)

Patient ID	Patient Name	Clinician	Authenticator	Document Type	Location	Date Dictated	Comments	Actions
		Nathan V. Jacoby	Nathan Jacoby	NuProg	East	2/17/2014 11:04 AM		View Transcription
		Nathan V. Jacoby	Nathan Jacoby	NuProg	East	12/8/2020 3:09 PM		View Transcription
		Nathan V. Jacoby	Nathan Jacoby	NuProg	East	12/8/2020 3:09 PM		View Transcription
GS_14	Larry Wall	Nathan V. Jacoby	Nathan Jacoby	GS	East	11/17/2023 2:24 AM		View Transcription
GS_15	GS 15	Nathan V. Jacoby	Nathan Jacoby	GS	East	11/17/2023 2:25 AM		View Transcription

## 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.

Advanced Search:

Filter Results: "Order Number":"123" "Location":"East"

Clear all | Order Number: 123 | Location: East

Results: 2

Patient Name	Clinician	Authenticator	Document Type	Location	Order Number ↑	Date Dictated	Comments	Actions
JACKSON ALDRID...	Demonstration User	Demonstration U...	Chart	East	07071238	8/1/2024 2:56 PM		View Transcription
	Nathan V. Jacoby	Nathan Jacoby	AMBIENT	East	12354AT	6/3/2024 11:00 AM		View Transcription

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.

Advanced Search

123 "Location":"East" Q [Create Document](#)

Clear all 123 Location: East

Bulk Actions Results: 4 Default Layout Choose Columns Results per page 10

Drag a column header here to group by that column

	Patient Name	Clinician	Authenticator	Document Type	Location	Order Number ↑	Date Dictated	Comments	Actions
<input type="checkbox"/>		Nathan V. Jacoby	Nathan Jacoby	GS	East		11/17/2023 6:52 PM		View Transcription
<input type="checkbox"/>	Attest Test 1	Ris C. Kodak	Authenticating ...	AI	East		11/17/2023 8:31 PM		View Transcription
<input type="checkbox"/>	JACKSON ALDRID...	Demonstration Us...	Demonstration ...	Chart	East	07071238	8/1/2024 2:56 PM		View Transcription
<input type="checkbox"/>		Nathan V. Jacoby	Nathan Jacoby	AMBIENT	East	12354AT	6/3/2024 11:00 AM		View Transcription

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.

Advanced Search

"Order Number":"123" "Location":"East" Mel Q [Create Document](#)

Clear all Order Number: 123 Location: East Mel

Bulk Actions Results: 1 Default Layout Choose Columns Results per page 10

Drag a column header here to group by that column

	Patient Name	Clinician	Authenticator	Document Type	Location	Order Number ↑	Date Dictated	Comments	Actions
<input type="checkbox"/>	JACKSON ALDRID...	Demonstration User	Demonstration U...	Chart	East	07071238	8/1/2024 2:56 PM		View Transcription

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

Advanced Search

"Order Number":123 "Location":East Mel

Create Document

Clear all Order Number: 123 Location: East Mel

Bulk Actions

Results: 1

Default Layout Choose Columns Results per page 10

Drag a column header here to group by that column

	Patient Name	Clinician	Authenticator	Document Type	Location	Order Number ↑	Comment	Date Dictated	Comments	Actions
<input type="checkbox"/>	JACKSON ALDRI...	Demonstration U...	Demonstration ...	Chart	East	07071238	Dr. Melbeck	8/1/2024 2:56 PM		View Transcription

Dr. Melbeck is not found in CC list.

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.

304340242

Advanced Filters

Bulk Actions

Results: 1

Default Layout Choose Columns Results per page 250

Drag a column header here to group by that column

	Transcription ID	Receipt	Patient ID	Patient Name	Clinician	Authenticator	Document Type	Location	Date Dictated	Comment	Comments	Actions
<input type="checkbox"/>	304340242	32168291	GS_10		Nathan V. Jacoby	Nathan Jacoby	GS	East	11/17/2023 1:58 AM			View Transcription

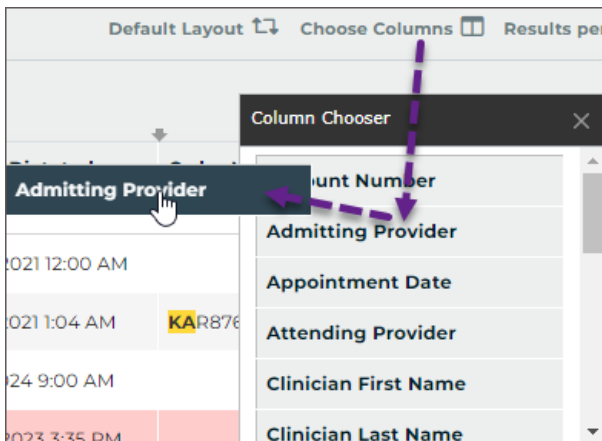
## 8.3 Data Grid

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.

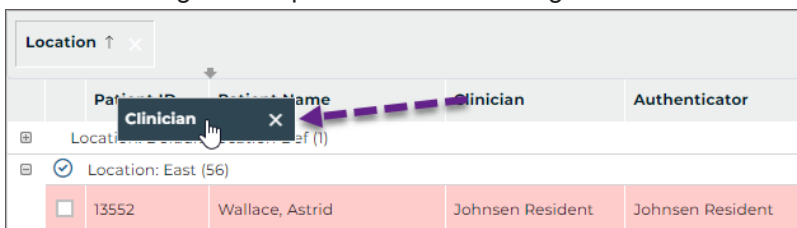


1. **Filter Results** - Allows filters to be applied to the transcriptions in the folder. See [Filter Results](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-filter-results) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-filter-results](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-filter-results)) for more details.
2. **Advanced Search** - Opens the Advanced Search window to specify filter criteria. See [Advanced Search](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-advanced-search) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-advanced-search](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-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](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-workflow-actions) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-workflow-actions](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-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.



- 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](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-comments) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-comments](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-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 to view additional actions that can be taken. See [Workflow Actions](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-workflow-actions) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-workflow-actions](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-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](#) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-legend](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-legend)) for more information.

✎ **Comment vs Comments**

The **Comments** column is in the default grid layout and displays an icon when a transcription has a comment and/or comment tag. The icon can be clicked to open the comment/tags window.

The **Comment** column can be added to the grid and will display the comment text, but not comment tags.

Comment	Comments
Corrections made as dictated in TID 301670505	●
Referral name is unclear.	🌈
Corrections made as dictated in TID 301729341	●

### 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.

Legend <span style="float: right;">✕</span>	
pink bar	Stat Transcription
colored text	Transcription came from Review folder
colored text	Transcription has Non-AutoFax Associate
colored text	Transcription of the <b>Inpatient</b> Document Group

### 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](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-dictation-status) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-dictation-status](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-dictation-status)) or [Referral](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-referral) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-referral](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-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 screenshot shows the 'Workflow' interface with a data grid. The grid has columns: Transcription ID, Patient ID, Patient Name, Clinician, Authenticator, Document Type, Location, Date Dictated, Comments, and Actions. The first row is selected, and a dropdown menu is open for the 'Actions' column. The menu items are: View Info, Edit Transcription, View Cover Letter, View Envelope, Fax, Preview Transcription, Print Transcription, Print Cover Letter, Print Envelope, Complete, Download, and Download with Format. The 'View Transcription' link is highlighted in the original image.

Transcription ID	Patient ID	Patient Name	Clinician	Authenticator	Document Type	Location	Date Dictated	Comments	Actions
250600686	12345	Welcome to eS-One	Demonstration User	Demonstration User	DisSum	Hospital	1/15/2024 1:25 PM		View Transcription   ⌵
304340247	5271041	NATE LUBICK	Demonstration User	Demonstration User	DisSum	East	1/19/2024 6:59 PM		
306774346	123A24	ERLINE BADER	Demonstration User	Demonstration User	Chart	East	1/6/2024 5:07 AM		
306756903	5271231059	ROSCOE L. SMITH	Demonstration User	Demonstration User	Chart	East	1/6/2024 2:04 AM		

The Actions column in the workflow folder data grid displays "View Transcription". Clicking on "View Transcription" will open the [Transcription Viewer](http://127.0.0.1:8000/print_page/#inquiry-inq_tran_viewer) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_tran\\_viewer](http://127.0.0.1:8000/print_page/#inquiry-inq_tran_viewer)). Clicking anywhere else on the record will open the [Transcription Editor](http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_tran\\_editor](http://127.0.0.1:8000/print_page/#inquiry-inq_tran_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  to view available actions for the given transcription.

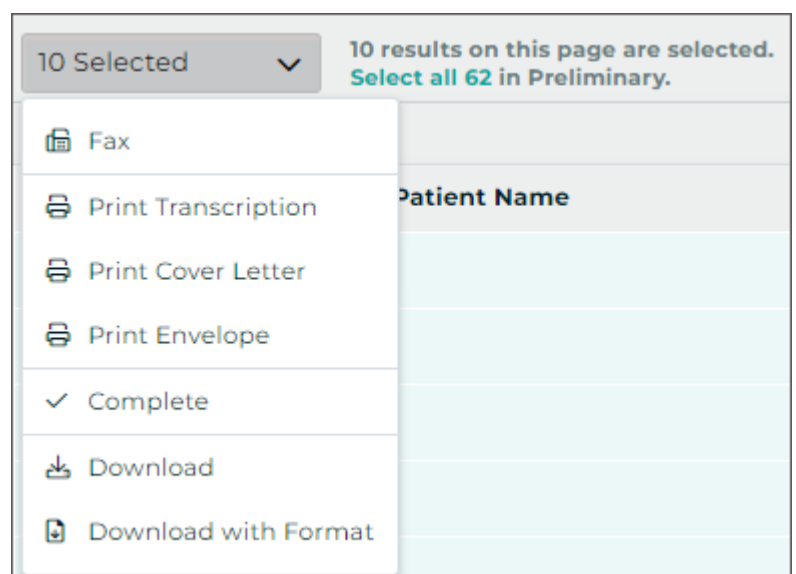
Action	Action Description	Act Loc
<b>View Transcription</b>	View the transcription contents in a separate web-browser tab.	- Ac colu
<b>View Info</b>	View additional <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_info">transcription information (http://127.0.0.1:8000/print_page/#inquiry-inq_tran_info)</a> .	- Ac me - Tra Vie
<b>Edit Transcription</b>	Edit the transcription text, demographics, referrals, signatures, and more.	- Cl grid - Ac me - Tra Vie
<b>View Cover Letter</b>	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.	- Ac me
<b>View Envelope</b>	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.	- Ac me
<b>Play</b> ( <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-play-dictations">http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-play-dictations</a> )	Opens the dictation playback control in a new web-browser window.	- Ac me - Tra Vie - Tra Edit

<b>Fax</b>	Opens the Fax on Demand dialog window. When opened from Bulk Actions, all selected transcriptions will be faxed to the same associate.	- Au mer - Tra Vie - Bu Acti mer
<b>Preview Transcription</b>	Opens a rendered preview of the transcription in the <a href="http://127.0.0.1:8000/print_page/#printing_agent">Inquiry Printing Agent</a> ( <a href="http://127.0.0.1:8000/print_page/#printing_agent">http://127.0.0.1:8000/print_page/#printing_agent</a> ) .	- Ac mer - Tra Vie
<b>Print Transcription</b>	Prints the transcription from the <a href="http://127.0.0.1:8000/print_page/#printing_agent">Inquiry Printing Agent</a> ( <a href="http://127.0.0.1:8000/print_page/#printing_agent">http://127.0.0.1:8000/print_page/#printing_agent</a> ) .	- Ac mer - Tra Vie - Bu Acti mer
<b>Print Cover Letter</b>	Prints the cover letter and transcription from the <a href="http://127.0.0.1:8000/print_page/#printing_agent">Inquiry Printing Agent</a> ( <a href="http://127.0.0.1:8000/print_page/#printing_agent">http://127.0.0.1:8000/print_page/#printing_agent</a> ) . Specific dictators or document types may not generate cover letters.	- Ac mer - Bu Acti mer
<b>Print Envelope</b>	Prints the envelope from the <a href="http://127.0.0.1:8000/print_page/#printing_agent">Inquiry Printing Agent</a> ( <a href="http://127.0.0.1:8000/print_page/#printing_agent">http://127.0.0.1:8000/print_page/#printing_agent</a> ) for the patient and/or associate. Specific dictators or document types may not generate envelopes.	- Ac mer - Bu Acti mer
	Completes the transcription from the current	- Ac mer - Bu Acti mer

<b>Complete</b>	workflow folder and progresses to the next stage of the workflow or to the Search All repository.	- Tra View - Tra Edit
<b>Download</b>	Downloads a PDF file of the transcription. This option is only available for transcriptions in the Preliminary folder.	- Ac me - Bu Acti me - Tra View
<b>Download with Format</b>	Opens the Select Format window to download the transcription in PDF or DOC format.	- Ac me - Bu Acti me - Vi Tra

### 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.

 **Note**

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 ([https://docs.escription-one.com/printing\\_agent/](https://docs.escription-one.com/printing_agent/)).

## 8.4.2 Play Dictations

The **Play** option opens the playback control to allow users to play/pause audio.

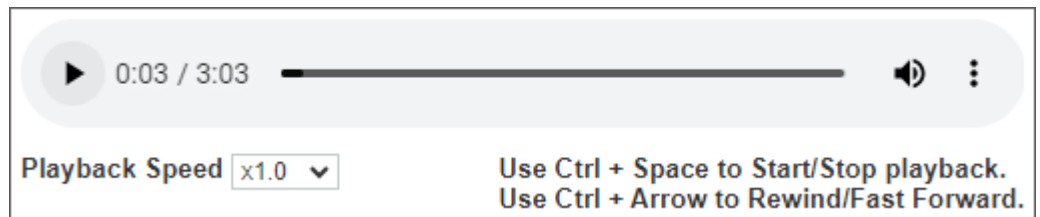
Users can also play/pause the audio using the

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 Transcription Viewer

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

**Discharge Summary**

<b>Patient Name:</b>	Welcome to eS-One	<b>Date of Service:</b>	January 15, 2024
<b>Patient ID:</b>	12345	<b>Date of Birth:</b>	March 1, 1999
<b>Clinician:</b>	Demonstration User	<b>User Field 1:</b>	UF1
<b>User Field 2:</b>	UF2	<b>User Field 3:</b>	UF3
<b>User Field 4:</b>	UF4	<b>User Field 5:</b>	UF5

**Welcome to the eScription-One InQuery System** This is a sample transcription created to introduce you to the InQuery System.

InQuery is a web-based application used to manage the workflow of new transcriptions delivered from your transcriptionists or transcription company. To use the full capabilities of InQuery, you must be using Microsoft Internet Explorer 10 or greater.

You are currently viewing an unsigned transcription. This transcription is accessible by you or other users that have "Proxy" rights to your transcriptions. Transcriptions in this folder can be Edited, and the original dictation can be Played. (This sample transcription does not have a dictation associated with it). Dictations are retained and can be played through the system for one year.

Editing a document allows you to alter the text of the transcription, as well as modify "header" information (including patient demographics, document type settings, report location, etc.). Note that altering this header information can change the entire layout of the final transcription. For example, changing a Chart note to a Letter inserts a greeting and a closing section to the report.

When you are finished with this transcription and wish to "approve" or "sign" this document, simply click the "Complete" button at the top of this screen. Alternatively, you can use the "Complete Selected" and "Complete All" buttons on the main screen to approve multiple transcriptions at once. When a report is completed, it will follow the workflow configured for your client. In some cases, this will go to a location for printing, such as a Medical Records department. Regardless of its destination, you can always search for any report from the complete database of transcriptions on the Search screen.

When this Welcome document is completed, it will be removed from the InQuery system.

---

Demonstration User


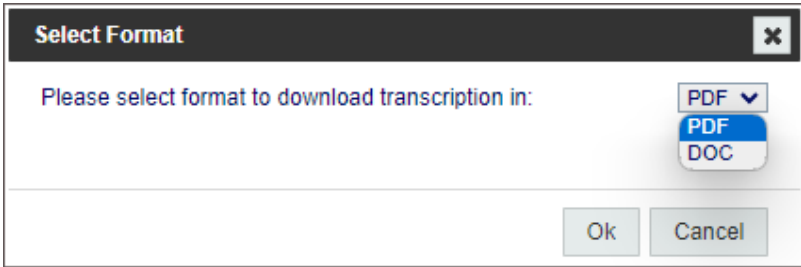
Date Dictated: 01/15/2024  
Date Transcribed: 01/15/2024  
DU/AUTO  
Job #: 250600686

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.

	<b>Button Labels</b>	Toggles the button labels on and off.
	<b>Print</b>	Launches the eSOne Inquiry Printing Agent to print the transcription. See <a href="http://127.0.0.1:8000/print_page/#printing_agent-index.md">eSOne Inquiry Printing Agent (http://127.0.0.1:8000/print_page/#printing_agent-index.md)</a> for more details on printing from InQuery.
	<b>Preview</b>	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.
	<b>Fax</b>	Opens the Fax on Demand dialog window.
	<b>Download</b>	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.
		
	<b>Previous</b>	Opens the previous Transcription in the workflow folder data grid. This button is disabled if it is the first transcription.
	<b>Next</b>	Advances to the next Transcription in the workflow folder data grid. This button is disabled if it is the last transcription.
	<b>Info</b>	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 <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_viewer-transcription-information">Transcription Information (http://127.0.0.1:8000/print_page/#inquiry-inq_tran_viewer-transcription-information)</a> .
	<b>Edit</b>	Opens the transcription in edit mode to allow edits to the transcription text and patient/appointment demographics. Edit Mode is covered comprehensively in <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_viewer-transcription-editor">Transcription Editor (http://127.0.0.1:8000/print_page/#inquiry-inq_tran_viewer-transcription-editor)</a> .



### 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.



### Complete/Next

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.



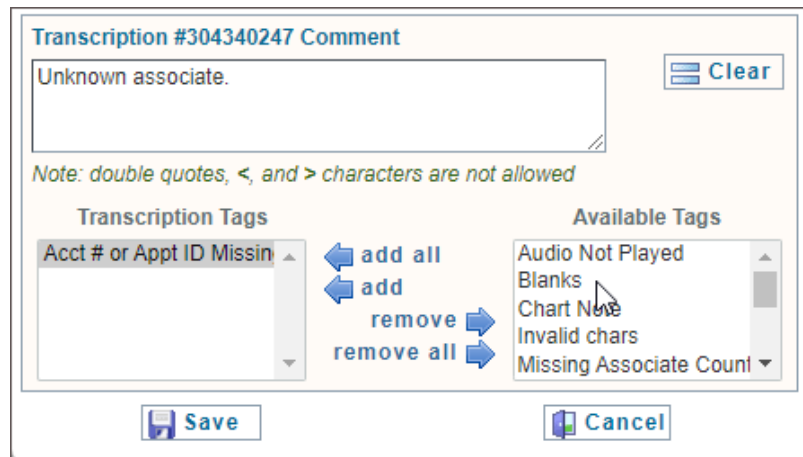
### Complete

Completes the transcription from the current workflow folder and closes the transcription viewer. If the transcription is in the Preliminary folder the electronic signature will be applied if that feature is being used.



### Comment

View and edit transcription comments and comment tags.



### Cumulative

Combines all transcriptions from the data grid into one document without white space between transcriptions. This feature was designed for "Sticky Paper" or "Roll Paper" as a method of conserving paper.

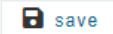
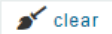
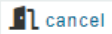
View and edit patient contact information

view and edit patient contact information.



## Patient Info

Patient Name	NATE LUBICK
Address 1	913 CLAY STREET
Address 2	
Address 3	
City	PITTSBURGH
State	PA
Zip Code	15215
Home Phone	8885271041
Work Phone	
Pat Letter	None ▾
Update Patient in Database	<input type="checkbox"/>

 save     clear     cancel



## Exit

Closes the Transcription Viewer.

### Note

The labels of the Complete/next and Complete buttons are customizable by the client.

# 10 Transcription Viewer

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

**Discharge Summary**

<b>Patient Name:</b>	Welcome to eS-One	<b>Date of Service:</b>	January 15, 2024
<b>Patient ID:</b>	12345	<b>Date of Birth:</b>	March 1, 1999
<b>Clinician:</b>	Demonstration User	<b>User Field 1:</b>	UF1
<b>User Field 2:</b>	UF2	<b>User Field 3:</b>	UF3
<b>User Field 4:</b>	UF4	<b>User Field 5:</b>	UF5

**Welcome to the eScripture-One InQuery System** This is a sample transcription created to introduce you to the InQuery System.

InQuery is a web-based application used to manage the workflow of new transcriptions delivered from your transcriptionists or transcription company. To use the full capabilities of InQuery, you must be using Microsoft Internet Explorer 10 or greater.

You are currently viewing an unsigned transcription. This transcription is accessible by you or other users that have "Proxy" rights to your transcriptions. Transcriptions in this folder can be Edited, and the original dictation can be Played. (This sample transcription does not have a dictation associated with it). Dictations are retained and can be played through the system for one year.

Editing a document allows you to alter the text of the transcription, as well as modify "header" information (including patient demographics, document type settings, report location, etc.). Note that altering this header information can change the entire layout of the final transcription. For example, changing a Chart note to a Letter inserts a greeting and a closing section to the report.

When you are finished with this transcription and wish to "approve" or "sign" this document, simply click the "Complete" button at the top of this screen. Alternatively, you can use the "Complete Selected" and "Complete All" buttons on the main screen to approve multiple transcriptions at once. When a report is completed, it will follow the workflow configured for your client. In some cases, this will go to a location for printing, such as a Medical Records department. Regardless of its destination, you can always search for any report from the complete database of transcriptions on the Search screen.

When this Welcome document is completed, it will be removed from the InQuery system.

---

Demonstration User


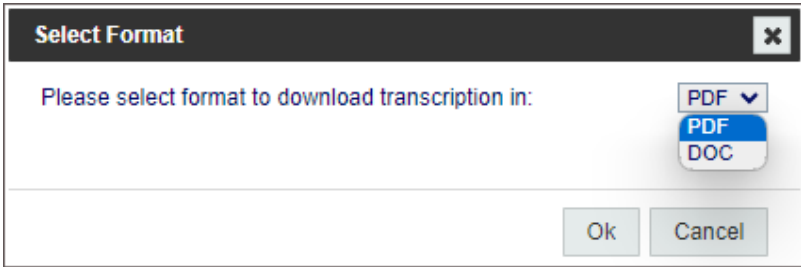
Date Dictated: 01/15/2024  
Date Transcribed: 01/15/2024  
DU/AUTO  
Job #: 250600686

preview of the document, the top of the Transcription Viewer contains available [Workflow Actions](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-workflow-actions) ([http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_workflow-workflow-actions](http://127.0.0.1:8000/print_page/#inquiry-inq_workflow-workflow-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.

## 10.1 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.

	<b>Button Labels</b>	Toggles the button labels on and off.
	<b>Print</b>	Launches the eSOne Inquiry Printing Agent to print the transcription. See <a href="#">eSOne InQuery Printing Agent</a> ( <a href="http://127.0.0.1:8000/print_page/#printing_agent">http://127.0.0.1:8000/print_page/#printing_agent</a> ) for more details on printing from InQuery.
	<b>Preview</b>	Opens a rendered preview of the transcription in the eSOne InQuery Printing Agent, displaying how the document will appear on paper after it is printed.
	<b>Fax</b>	Opens the Fax on Demand dialog window.
	<b>Download</b>	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.
		
	<b>Previous</b>	Opens the previous Transcription in the workflow folder data grid. This button is disabled if it is the first transcription.
	<b>Next</b>	Advances to the next Transcription in the workflow folder data grid. This button is disabled if it is the last transcription.
	<b>Info</b>	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 <a href="#">Transcription Information</a> ( <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-transcription-information">http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-transcription-information</a> ) .
	<b>Edit</b>	Opens the transcription in edit mode to allow edits to the transcription text and patient/appointment demographics. Edit Mode is covered comprehensively in <a href="#">Transcription Editor</a> ( <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-transcription-editor">http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-transcription-editor</a> ) .



### 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.



### Complete/Next

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.



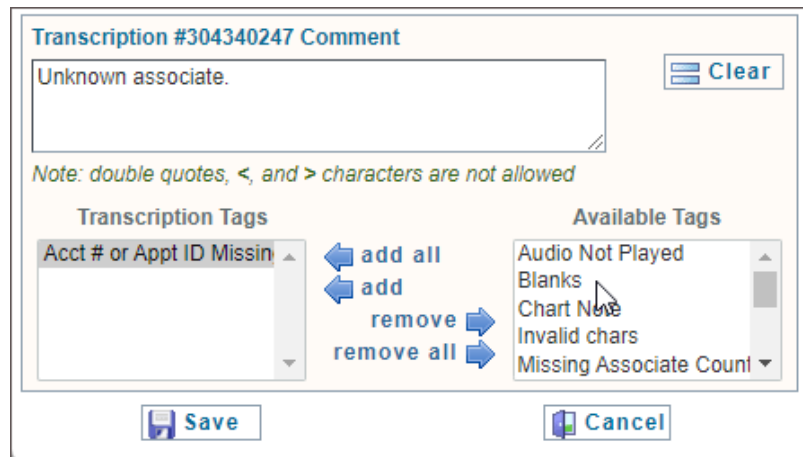
### Complete

Completes the transcription from the current workflow folder and closes the transcription viewer. If the transcription is in the Preliminary folder the electronic signature will be applied if that feature is being used.



### Comment

View and edit transcription comments and comment tags.



### Cumulative

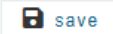
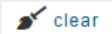
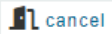
Combines all transcriptions from the data grid into one document without white space between transcriptions. This feature was designed for "Sticky Paper" or "Roll Paper" as a method of conserving paper.

View and edit patient contact information

view and edit patient contact information.

## Patient Info

Patient Name	NATE LUBICK
Address 1	913 CLAY STREET
Address 2	
Address 3	
City	PITTSBURGH
State	PA
Zip Code	15215
Home Phone	8885271041
Work Phone	
Pat Letter	None ▾
Update Patient in Database	<input type="checkbox"/>

 save     clear     cancel



## Exit

Closes the Transcription Viewer.

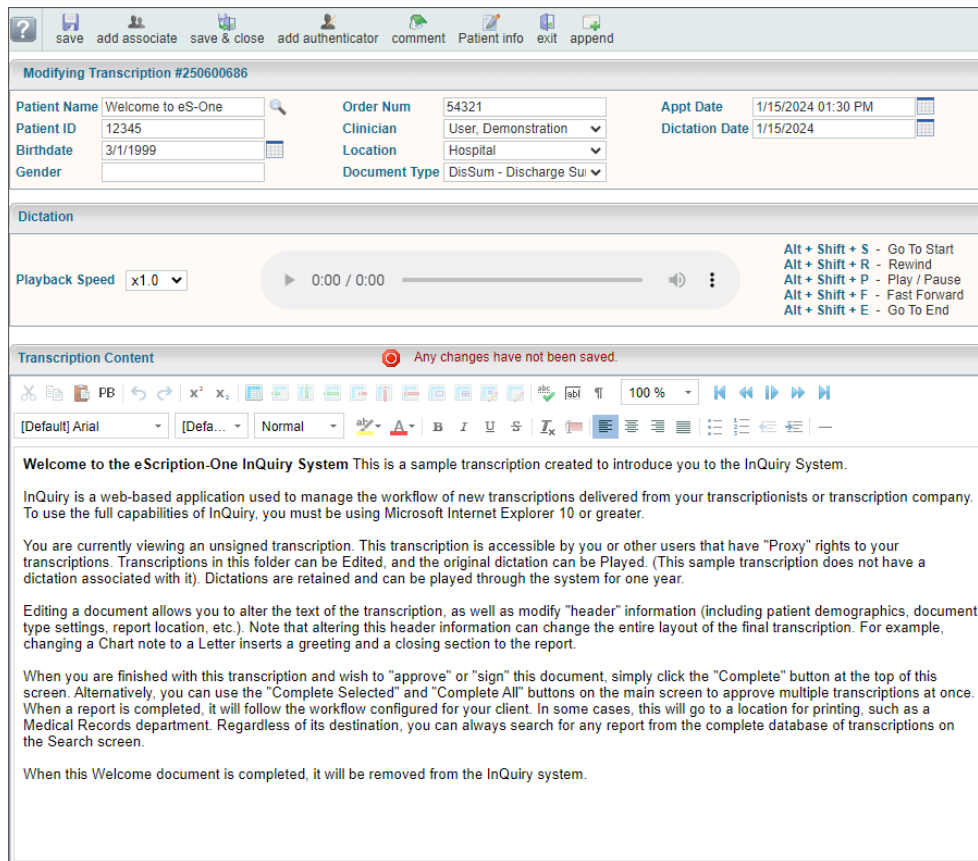
### Note

The labels of the Complete/next and Complete buttons are customizable by the client.



## 10.2 Transcription Editor

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**.

### 10.2.1 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.

	<b>Button Labels</b>	Toggles the button labels on and off.
	<b>Save</b>	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.
	<b>Add Associate</b>	Adds an additional section beneath the Editor window where Referred Associates can be to search for or manually add referred Associates. See <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-associates">Associates</a> ( <a href="http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-associates">http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-associates</a> ) for more details.
	<b>Save &amp; Close</b>	Saves changes made to the demographics and transcription text, closes the editor window, and returns to the Transcription Viewer.
	<b>Play Dictation</b>	<p>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.</p> <div data-bbox="549 1299 1353 1489" data-label="Image">  </div>
	<b>Complete/Next</b>	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.
	<b>Complete</b>	Saves changes and completes the transcription from the current workflow folder and closes the transcription viewer. If the transcription is in the Preliminary folder the electronic signature will be applied if that feature is being used.
		Used when additional signatures are needed on the transcription.



## Add Authenticator

Adds the Additional Authenticators section beneath the transcription text and Referred Associates. See [Authenticators \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_tran\\_editor-authenticators\)](http://127.0.0.1:8000/print_page/#inquiry-inq_tran_editor-authenticators) for additional details.



## Comment

View and edit transcription comments and comment tags.

**Transcription #304340247 Comment**

Unknown associate. Clear

*Note: double quotes, <, and > characters are not allowed*

Transcription Tags: Acct # or Appt ID Missin

Available Tags: Audio Not Played, Blanks, Chart Note, Invalid chars, Missing Associate Count

add all, add, remove, remove all

Save Cancel



## Patient Info

View and edit patient contact information.

Patient Name	NATE LUBICK
Address 1	913 CLAY STREET
Address 2	
Address 3	
City	PITTSBURGH
State	PA
Zip Code	15215
Home Phone	8885271041
Work Phone	
Pat Letter	None
Update Patient in Database	<input type="checkbox"/>

save clear cancel



## Exit

Closes the Transcription Viewer.



## Append

Appends the opened transcription to the end of another transcription, identified by Transcription ID.

**Append To Existing Transcription**

The Transcription you are editing will be appended to the Transcription ID (TID) entered below.

Please enter the Transcription ID:

Ok Cancel

Removes the link between the selected transcription and the

transcription it was appended to. The Unappend button only appears when an append relationship exists.



## Unappend

**Unappend Transcription**

The transcription you are editing is composed of two or more individual transcriptions, linked by the Append feature.

By choosing Unappend you will unlink the last transcription. Do you want to continue?

Ok Cancel

### 10.2.2 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:

Modifying Transcription #250600686			
Patient Name	Welcome to eS-One	Order Num	54321
Patient ID	12345	Clinician	User, Demonstration
Birthdate	3/1/1999	Location	Hospital
Gender		Document Type	DisSum - Discharge Sum
		Appt Date	1/15/2024 01:30 PM
		Dictation Date	1/15/2024

- **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.

### 10.2.3 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.

**Transcription Content** Any changes have not been saved.

**Welcome to the eScript-One InQuery System** This is a sample transcription created to introduce you to the InQuery System.

InQuery is a web-based application used to manage the workflow of new transcriptions delivered from your transcriptionists or transcription company. To use the full capabilities of InQuery, you must be using Microsoft Internet Explorer 10 or greater.

You are currently viewing an unsigned transcription. This transcription is accessible by you or other users that have "Proxy" rights to your transcriptions. Transcriptions in this folder can be Edited, and the original dictation can be Played. (This sample transcription does not have a dictation associated with it). Dictations are retained and can be played through the system for one year.

Editing a document allows you to alter the text of the transcription, as well as modify "header" information (including patient demographics, document type settings, report location, etc.). Note that altering this header information can change the entire layout of the final transcription. For example, changing a Chart note to a Letter inserts a greeting and a closing section to the report.

When you are finished with this transcription and wish to "approve" or "sign" this document, simply click the "Complete" button at the top of this screen. Alternatively, you can use the "Complete Selected" and "Complete All" buttons on the main screen to approve multiple transcriptions at once. When a report is completed, it will follow the workflow configured for your client. In some cases, this will go to a location for printing, such as a Medical Records department. Regardless of its destination, you can always search for any report from the complete database of transcriptions on the Search screen.

When this Welcome document is completed, it will be removed from the InQuery system.

### 10.2.4 In-Editor Audio Control

InQuery 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.

**Modifying Transcription #304340247**

<b>Patient Name</b>	NATE LUBICK	<b>Order Num</b>		<b>Appt Date</b>	1/19/2024 08:30 AM
<b>Patient ID</b>	5271041	<b>Clinician</b>	User, Demonstration	<b>Dictation Date</b>	1/19/2024
<b>Birthdate</b>	10/20/1959	<b>Location</b>	East		
<b>Gender</b>	M	<b>Document Type</b>	DisSum - Discharge Su		

**Dictation**

Playback Speed: x1.0

- 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

**Transcription Content** Changes last saved at 1/19/24 4:55 PM.

**DISCHARGE DIAGNOSIS:** Chest pain.

**DISCHARGE MEDICATIONS:**

- L-thyroxine 0.075 mg p.o. daily.
- Trilafon 4 to 8 mg p.o. q.h.s.

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 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.

## 10.3 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.

Referred Associates		top		No Primary
Associate Code	M15575508087CBC750 (optional)			<input type="radio"/> Primary
Associate Name	Test		Associate	<input type="checkbox"/> Add/Update in Database
Greeting	Dr. Associate	Prefix	Dr. Suffix	<input type="checkbox"/> Autofax Associate
Business Name	Associates of Madison			<input type="checkbox"/> Patient's PCP
Specialty				<input type="button" value="search"/>
Address 1	123 DeliverHealth Way			<input type="button" value="delete"/>
Address 2				
Address 3				
City	Madison			
State	WI			
Zip Code	53715			
Phone Number		Fax Number		
E-mail				
Associate Type	<input type="checkbox"/> Internal			

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.

Last Name	<input type="text" value="mail"/>	Specialty	<input type="text" value="Any"/>	<input type="button" value="search"/> <input type="button" value="cancel"/>
First Name	<input type="text"/>	City	<input type="text"/>	
Business Name	<input type="text"/>	State	<input type="text"/>	
Associate Code	<input type="text"/>	Zip Code	<input type="text"/>	
		Results Per Page	<input type="text" value="10"/>	

First Name	Last Name	Business Name	Phone	Fax	Associate Code	Specialty	Address 1	Address 2	Address 3	City	State	Zip Code
Associate	Mail 1	Mail Associate 1		6082741744	Mail1	Mail	123 Mail Address	Ste 1A		City	ST	10232
Associate	Mail 2	Mail Associate 2		6081112222	Mail2		123 Mail Address	Ste 2		City	ST	10232
Associate	Mail 3	Mail Associate 3	1234567890	0123456789	Mail3		123 Mail Address	Ste 3	3rd Flr	City	ST	10232

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

## 10.4 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.

Additional Authenticators			
Signing Order	Signer	Date signed	
1	Attending, Authenticating	Not Signed	
2	Doe, Jane	Signed on 1/15/2024 9:39:24 PM	





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 Transcription Information

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  Info button and by selecting **View Info** from the Actions menu in the data grid.

Transcription #307907217

 save
  refresh
  export
  close



Current Status Final




Change To No change ▼



Document Information

Patient ID: 5271009  
 Patient Name: MYKE HENRY  
 Gender: M  
 Birthdate: 9/22/01  
 Appointment Date: 1/26/24 9:00 AM  
 Clinician: Demonstration User  
 Document Type: NuProg  
 Location: East  
 Date Dictated: 1/26/24 9:29 AM  
 Date Received: 1/26/24 10:17 AM  
 Date Transcribed: 1/26/24 10:56 AM  
 Date Delivered: 1/26/24 10:56 AM  
 Date Signed: 1/26/24 11:01 AM  
 Marked for Review: No  
 Invalidated: No  
 Comment:  
 Account Number: OR252710090126  
 Admit Date: 1/26/24 9:00 AM  
 Discharge Date:  
 Orders:

Activity

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


Date	Action	Action By	Type
1/26/24 10:17 AM	Received	DemoUser	Inquiry User
1/26/24 10:51 AM	Manager Checked Out	15695	Transcriptionist
1/26/24 10:51 AM	Checked Out	12839	Transcriptionist
 1/26/24 10:56 AM	Delivered	12839	Transcriptionist
1/26/24 10:59 AM	Dictation Played	DemoUser	Inquiry User
1/26/24 10:59 AM	Viewed	DemoUser	Inquiry User
1/26/24 10:59 AM	Dictation Played	DemoUser	Inquiry User
 1/26/24 11:00 AM	Edited	DemoUser	Inquiry User
 1/26/24 11:01 AM	Completed From Preliminary	DemoUser	Inquiry User
1/26/24 11:01 AM	Viewed	DemoUser	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

Refresh  View Archived 

Dictation Information



Patient ID: 5271009  
 Appointment Date: 1/26/24  
 Clinician: Demonstration User  
 Document Type: NuProg  
 Location: East  
 Dictation Source: Recorder  
 Account Number: OR252710090126  
 Order Number:  
 Order Number:  
 Stat: ✘  
 Dictation Length: 00:02:03:000

Append Information

Transcription #307907217: Final Info 

Prior Versions of Transcription Body

questions about versioning?

Action 	Date Replaced	Version Date
 view	1/26/2024 11:00:59 AM	1/26/2024 10:56:38 AM

## 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.

### Note

Not all users will have access to change the status or may have different status options than shown here.


## 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.





**Append Information**

Transcription #307907217: Final  info

Transcription #294211121: Search All  info

**Prior Versions of Transcription Body**



[questions about versioning?](#)







Action 	Date Replaced	Version Date
 view	1/26/2024 1:48:44 PM	1/26/2024 1:43:24 PM
 view	1/26/2024 1:43:24 PM	1/26/2024 11:00:59 AM
 view	1/26/2024 11:00:59 AM	1/26/2024 10:56:38 AM



## 11.4 Activity Log

## Activity

*All times are in the time zone of "Central Standard Time"*

Refresh  View Archived 

	Date	Action	Action By	Type
	1/26/24 10:17 AM	Received	Admin	InQuery User
	1/26/24 10:51 AM	Manager Checked Out	15695	Transcriptionist
	1/26/24 10:51 AM	Checked Out	12839	Transcriptionist
	1/26/24 10:56 AM	Delivered	12839	Transcriptionist
	1/26/24 10:59 AM	Dictation Played	Admin	InQuery User
	1/26/24 10:59 AM	Viewed	Admin	InQuery User
	1/26/24 10:59 AM	Dictation Played	Admin	InQuery User
	1/26/24 11:00 AM	Edited	Admin	InQuery User
	1/26/24 11:01 AM	Completed From Preliminary	Admin	InQuery User
	1/26/24 11:01 AM	Viewed	Admin	InQuery 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	InQuery User
	1/26/24 11:29 AM	Viewed	Admin	InQuery User
	1/26/24 11:30 AM	Printed	Admin	InQuery User
	1/26/24 1:41 PM	Dictation Played	Admin	InQuery User
	1/26/24 1:41 PM	Viewed	Admin	InQuery User
	1/26/24 1:43 PM	Edited	Admin	InQuery User
	1/26/24 1:43 PM	Viewed	Admin	InQuery 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	InQuery User
	1/26/24 1:48 PM	Viewed	Admin	InQuery User
	1/26/24 1:48 PM	Edited	Admin	InQuery User
	1/26/24 1:48 PM	Appended	Admin	InQuery 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 transcription that is not intended to show up on the printed transcription itself. The comment can be used by Medical Transcriptionists or staff members to convey information to providers, or vice versa. The comments can be viewed or edited by clicking on the comment buttons in the Transcription Viewer and Editor, or by using the Comments Icon in the workflow.

## 12.2 Comment Tags

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

# 13 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.


## 13.1 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 [Searching and Filtering \(http://127.0.0.1:8000/print\\_page/#inquiry-inq\\_search\\_all-searching-and-filtering\)](http://127.0.0.1:8000/print_page/#inquiry-inq_search_all-searching-and-filtering) for more details.

### 13.1.1 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 ). 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.

## 13.2 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.

### 13.2.1 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.

# 14 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/> (<https://www.escription-one.com.au/Software/ShadowPrint/>)

**Canada** <https://www.escription-one.ca/Software/ShadowPrint/> (<https://www.escription-one.ca/Software/ShadowPrint/>)

**United States** <https://www.escription-one.com/Software/ShadowPrint/> (<https://www.escription-one.com/Software/ShadowPrint/>)



# 15 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 InQuery. The manual for installation, configuration and maintenance can be found at:

**Australia** <https://www.escription-one.com.au/Software/ShadowLink/> (<https://www.escription-one.com.au/Software/ShadowLink/>)

**Canada** <https://www.escription-one.ca/Software/ShadowLink/> (<https://www.escription-one.ca/Software/ShadowLink/>)

**United States** <https://www.escription-one.com/Software/ShadowLink/> (<https://www.escription-one.com/Software/ShadowLink/>) /

# 16 InVision

The InVision tab contains the administrative reporting tools. By default, InQuery 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 sub-tabs: Reports, Scheduled Reports and Saved Reports.

## 16.1 Reports

The Reports tab lists all reports available to the user. InQuery 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.

### 16.1.1 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

### 16.1.2 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 InQuery 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.

### 16.1.3 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.

## 16.2 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 Filtering** for more information

### 16.2.1 Scheduled Report Actions

Several actions can be taken on a scheduled report.

1. **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.

## 16.3 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 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.