



DeliverHealth

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1 InstaNote for InQuiry and eSOne Mobile

InstaNote, part of DeliverHealth's eSOne platform, leverages generative AI to transform healthcare documentation by instantly converting dictations and conversations into structured clinical notes.

The eSOne platform enhances the InstaNote experience with an integrated suite of tools designed to support every step of the documentation workflow. From capturing and refining dictations to verifying and finalizing accurate clinical notes, the platform ensures a smooth, efficient, and precise process. InstaNote empowers providers to streamline their workflows, reduce documentation burdens, and deliver high-quality care with confidence.

This guide focuses on two key features available exclusively for users of InstaNote Direct Delivery: Reprocess InstaNote and InstaNote Correction Note. These functionalities empower users to efficiently resubmit and correct documentation, ensuring accuracy and compliance in patient records.

By mastering these features, you can enhance your documentation workflow, reduce errors, and improve overall efficiency.

2 Reprocess Note

InstaNote's Reprocess feature allows users to reinitiate the generative AI processing of the document using the selected document type's InstaNote configuration and the initial speech-to-text draft. The dictation is not used in reprocessing, resulting in a faster turnaround time of the reprocessed note. This functionality is particularly useful when the incorrect document type was submitted with the dictation.

The Reprocess action can be initiated from InQuery and is only available on notes processed by InstaNote.

2.1 Reprocess from InQuery

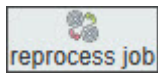
How to use the Reprocess feature in InQuery:

1. Access the Document:

- Log in to InQuery.
- Navigate to the given workflow folder or Search All and location the note.
- Open the note in **Edit** mode.

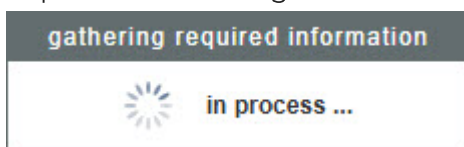
2. Initiate Reprocessing:

- Press **reprocess job** in the toolbar.



3. Review the Updated Note:

- Once reprocessing is complete review the note to ensure all data is correct; processing time depends on the length of the note and is completed when the "in process" message closes.



- To revert to the original draft of the note, press **Undo** or close the editing window prior to saving changes.

4. Edit the Note:

- Make any necessary changes to the demographics, document type, location, note text, etc.
- **Save** changes.

Important Information

Changes made as a result of reprocessing InstaNote documents are not saved until Save or Complete has been pressed.

The Complete button may also sign notes, depending on where they are in the workflow

By utilizing the Reprocess feature, you can maintain the integrity and accuracy of your clinical documentation, thereby enhancing the quality of patient care.

3 Correction Note

The Correction Note feature transforms how you edit medical notes on the eSOne platform. With the power of generative AI, you can now make precise edits to your notes simply using voice commands. Whether you're refining details or restructuring content, this feature streamlines the editing process for greater efficiency.


Correct Note is available in InQuery and the eSOne Mobile apps for Android and iOS.

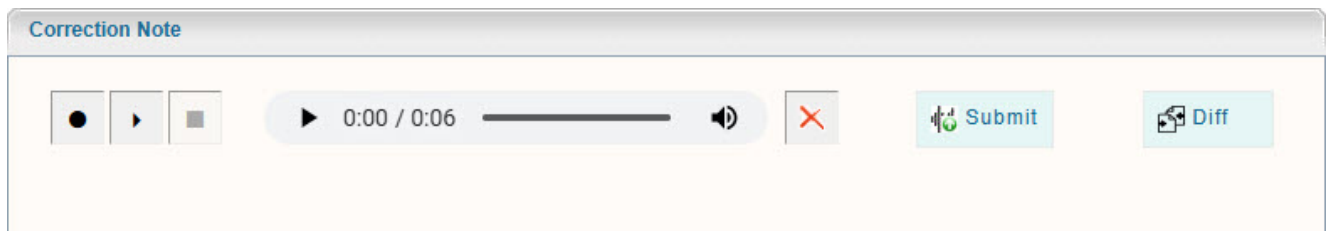
3.1 Using Correction Note in InQuery

1. Access the Document:





- Log in to InQuery.
- Navigate to the designated workflow folder or use Search All to locate the note.
- Open the note in **Edit** mode.

2. Open the Correction Note Controls:

- Locate the Correction Note button  in the toolbar. This button toggles the Correction Note control panel on and off.
- Click the Correction Note button to open the control panel above the editor window.



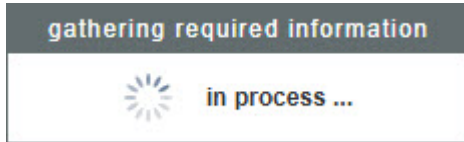
3. Record the Correction Note:

- Click **Record**  and dictate the necessary edits.
- Click **Stop**  when you finish recording.
 - To resume recording, click **Record** again.
 - To playback the recording, click **Play** . Use the progress slider to navigate within the recording.
- To delete the recording without submitting it, click **Delete** , then start a new recording if needed.

4. Submit the Recorded Correction Note:

- Click **Submit**.
- Wait for the edits to process. Processing time depends on the length of the note and is complete when the "In Process" message disappears and the Diff button appears in the Correction Note

control panel.




5. Review the Edited Note:

- The generative AI edits will appear in the note editor. Review the note thoroughly to ensure accuracy.
- Click **Diff** to view a comparison of edits made to the note.
- To revert the changes, click **Undo** in the editor toolbar, or close the editing window without saving changes.
- Make any additional edits, such as updates to demographics, document type, location, or note text, as needed.

6. **Save** the Edited Note:

- Save the edited note by selecting one of the following options:
 - Save
 - Save & Close
 - **Complete** or **Complete/Next** to finalize the changes and move the note along in the workflow.

 **Important Information**

Changes made using the Correction Note feature are not saved until Save or Complete has been pressed. The Complete button may also sign notes, depending on where they are in the workflow.



3.2 Using Correction Note in eSOne Mobile for Android

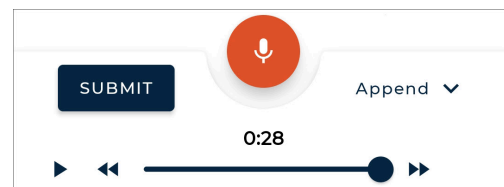
1. Access the Document:

- Log in to eSOne Mobile for Android.
- Navigate to the designated workflow folder or use Search All to locate the note.
- Open the note in **Edit** mode.
 - Tap the note to open the viewer.
 - Tap the pencil to open edit mode.

2. Record the Correction Note:

- Tap **Record**  at the bottom of the screen and dictate the necessary edits.




- Recording will continue while navigating between the Information, Transcription, and Comments sub-tabs.
- Tap **Stop**  when you finish recording.
 - To resume recording, tap **Record** again.
 - To playback the recording, tap **Play**. Use the progress slider to navigate within the recording.
 - To delete the recording without submitting it, tap **Undo**  at the top of the screen, then start a new recording if needed.





3. Submit the Recorded Correction Note:

- Tap **Submit**.
- Wait for the edits to process. Processing time depends on the length of the note and is complete when the "Please Wait" message disappears.

4. Review the Edited Note:

- The generative AI edits will appear in the note editor. Review the note thoroughly to ensure accuracy.
- Tap the Diff button  to show or hide color-coded highlights indicating the changes made to the note text.
 - Green represents added content.
 - Red represents deleted content.
 - Blue represents formatting changes.
- To revert the changes, click **Undo**  or **Back**  without saving changes.
- Make any additional edits, such as updates to demographics, document type, location, or note text, as needed.

5. Save the Edited Note:

- Save the edited note by selecting one of the following options:
 - **Save**  to save the change without advancing the note in the workflow.
 - **Complete**  to finalize the changes and advance the note in the workflow.

Important Information

Changes made using the Correction Note feature are not saved until Save or Complete has been pressed. The Complete button may also sign notes, depending on where they are in the workflow.

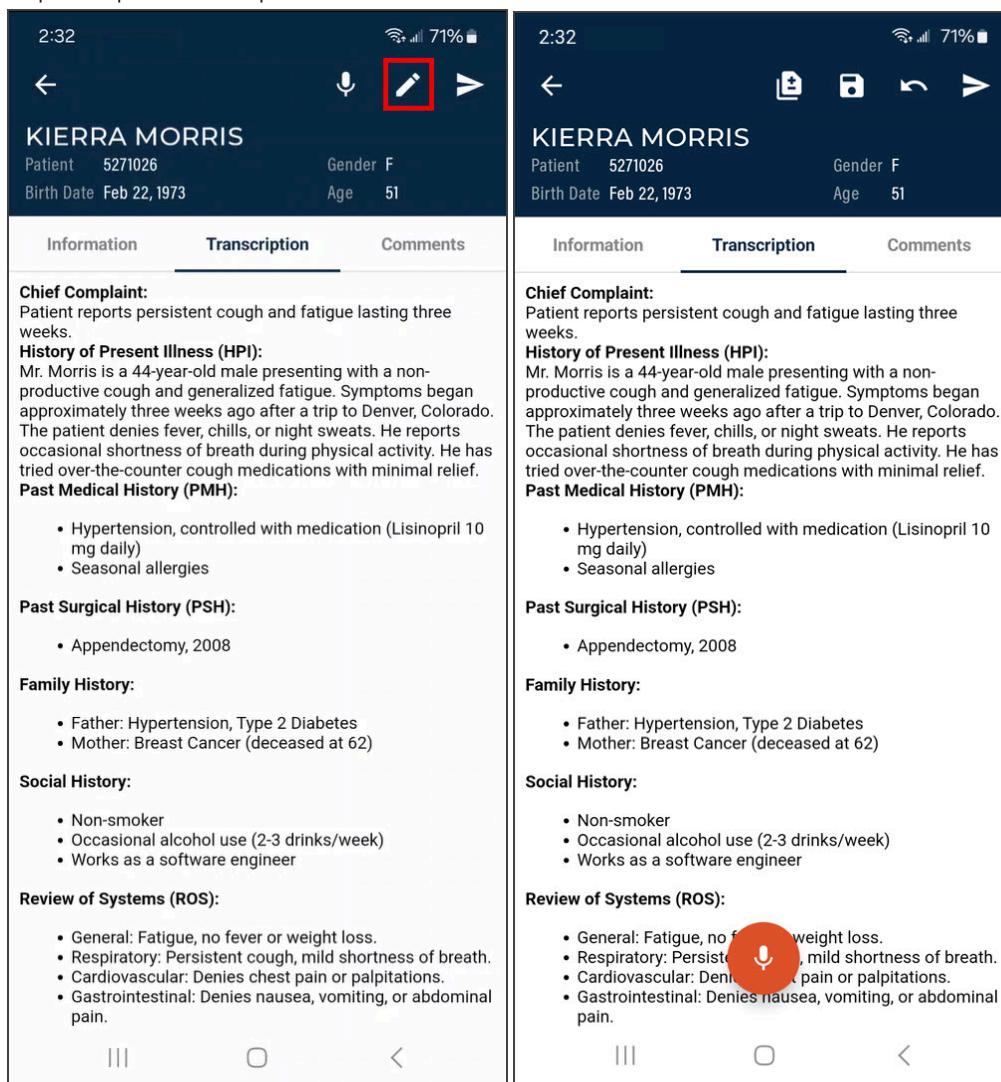
3.3 Correction Note Examples

3.3.1 eSOne Mobile for Android Example


Below is a step-by-step sample of the capabilities of Correction Note in the Android mobile app.

1. Access the Document:

- Log in to eSOne Mobile for Android.
- Navigate to the designated workflow folder or use Search All to locate the note.
- Open the note in **Edit** mode.
 - Tap the note to open the viewer.
 - Tap the pencil to open edit mode.





2. Record the Correction Note:

- Tap **Record**  at the bottom of the screen and dictate the necessary edits.
- Recording will continue while navigating between the Information, Transcription, and Comments sub-tabs.
- The dictation used for this example correction note was:

"Add a blank line after the Chief Complaint section header, add a blank line before and after the History of Present Illness section header, add a blank line before and after the Past Medical History section header.

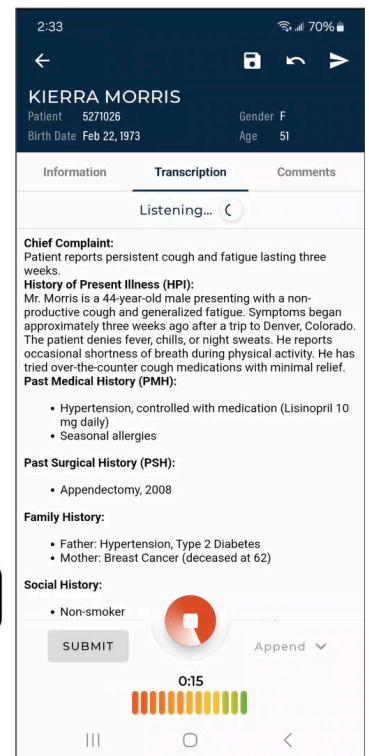
Change all gender references to female.

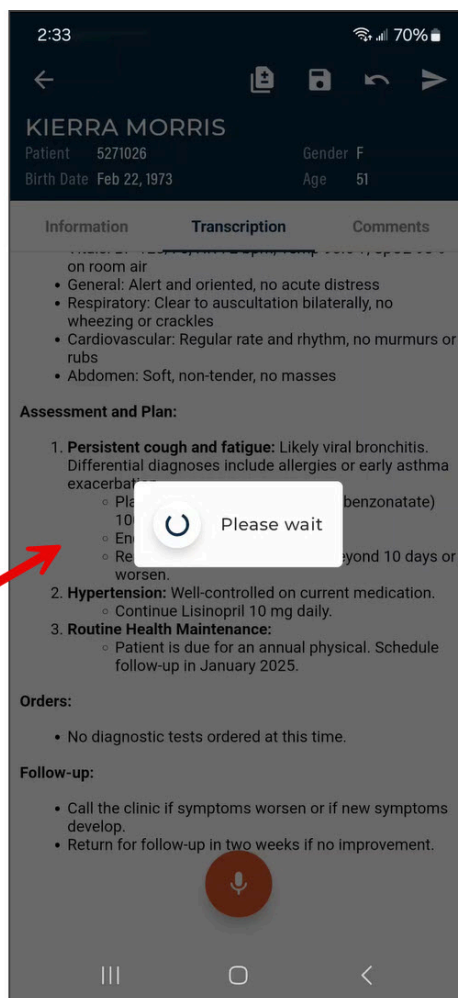
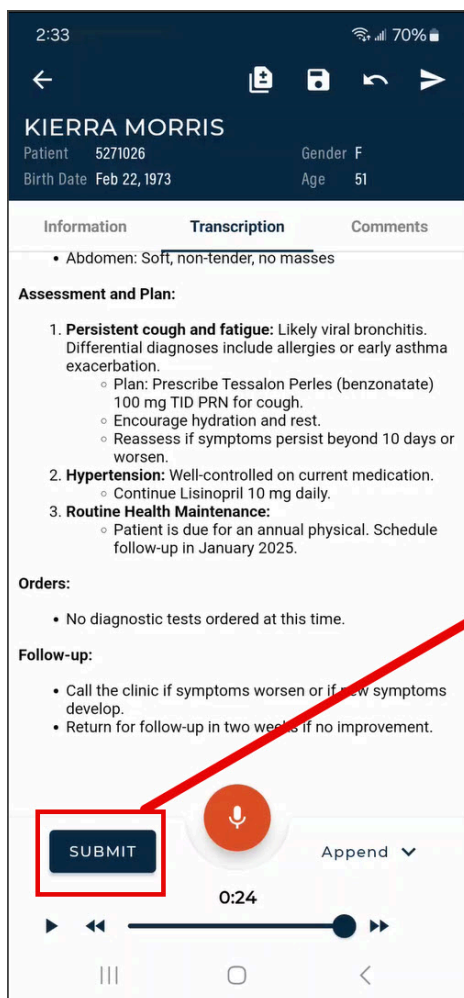
Bold Appendectomy and change the year to 2009."

- Tap **Stop**  when you finish recording.
 - To resume recording, tap **Record** again.
 - To playback the recording, tap **Play**. Use the progress slider to navigate within the recording.
 - To delete the recording without submitting it, tap **Undo**  at the top of the screen, then start a new recording if needed.

3. Submit the Recorded Correction Note:

- Tap **Submit**.
- Wait for the edits to process. Processing time depends on the length of the note and is complete when the "Please Wait" message disappears.

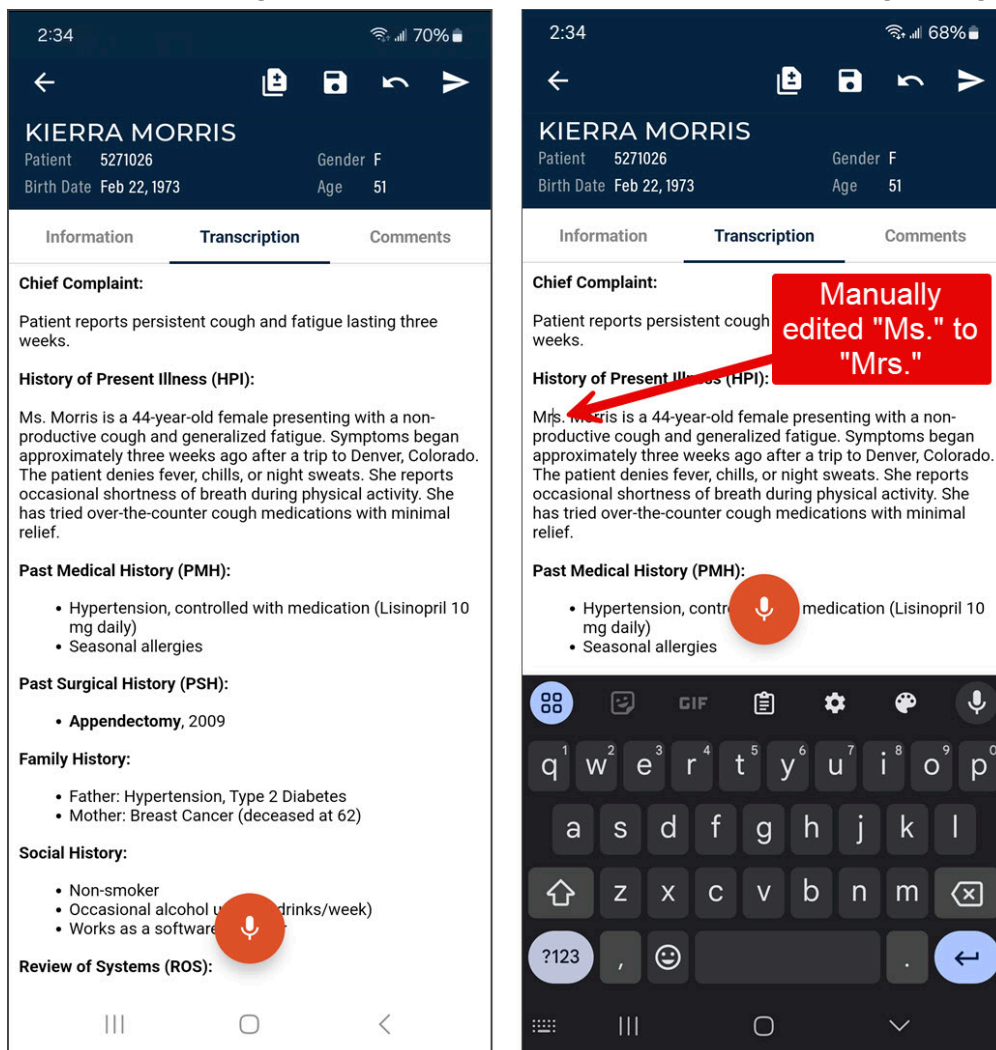





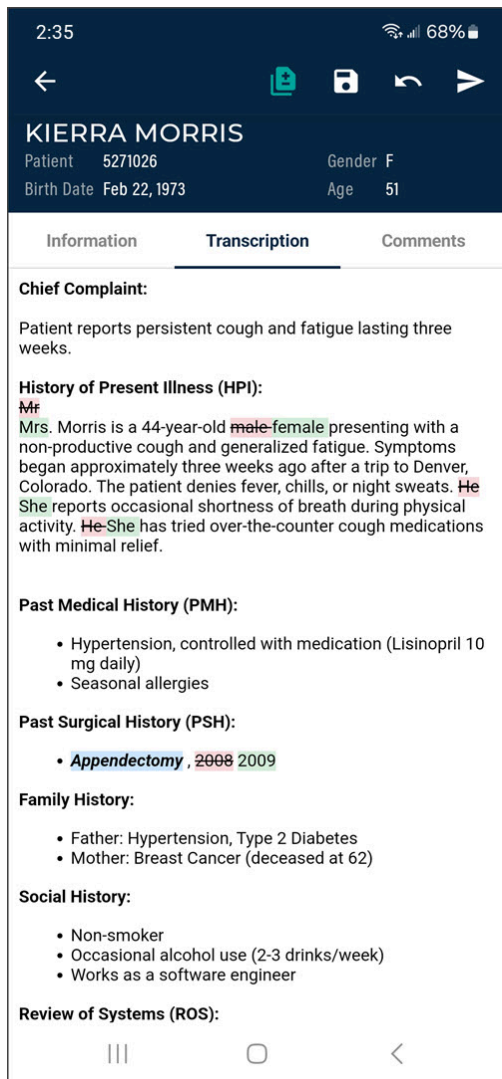
4. Review the Edited Note:

- The generative AI edits will appear in the note editor. Review the note thoroughly to ensure accuracy.
- Multiple correction note dictations can be recorded on the same note.
- Manual edits can also be made to the note text and demographics.

- To revert the changes, click **Undo**  or **Back**  without saving changes.





- Tap the **Difference View** button  to show or hide color-coded highlights indicating the changes made to the note text. Manual edits cannot be made while in Difference view. To make edits, toggle off Difference view first.
 - Green represents added content.
 - Red represents deleted content.
 - Blue represents formatting changes.





5. **Save** the Edited Note to finalize the changes:

- Save the edited note by selecting one of the following options:

- **Save**  to save the change without advancing the note in the workflow.

- **Complete**  to finalize the changes and advance the note in the workflow.

2:34 70%

←  

KIERRA MORRIS
 Patient 5271026 Gender F
 Birth Date Feb 22, 1973 Age 51

Information **Transcription** Comments

Chief Complaint:
 Patient reports persistent cough and fatigue lasting three weeks.

History of Present Illness (HPI):
 Ms. Morris is a 44-year-old female presenting with a non-productive cough and generalized fatigue. Symptoms began approximately three weeks ago after a trip to Denver, Colorado. The patient denies fever, chills, or night sweats. She reports occasional shortness of breath during physical activity. She has tried over-the-counter cough medications with minimal relief.

Past Medical History (PMH):

- Hypertension, controlled with medication (Lisinopril 10 mg daily)
- Seasonal allergies

Past Surgical History (PSH):

- Appendectomy, 2009


Family History:

- Father: Hypertension, Type 2 Diabetes
- Mother: Breast Cancer (deceased at 62)



Social History:

- Non-smoker
- Occasional alcohol use (2-3 drinks/week)
- Works as a software engineer

Review of Systems (ROS):



2:35 68%

←  

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