ChartScript®
User's Guide

SoftMed Systems, Inc. is the focused expert in delivering top-ranked healthcare information solutions. With over 2000 customers, SoftMed enables healthcare providers to enhance their operations, shorten their revenue cycle, improve patient care and achieve an electronic health record solution.

Recognized for superior integration with all major IT vendors, SoftMed supports its customers' goals of expediting chart completion, ensuring accurate and timely reimbursements, expediting document imaging, streamlining document creation, and maximizing payor compliance and organizational quality.

In business for more than 20 years, SoftMed's products are found in nearly one-third of the facilities on "America's Best Hospital Honor Roll"[1] and almost two-thirds of the Hospitals & Health Networks "100 Most Wired."[2] Nearly half of the hospitals on Solucient's 100 Top Hospitals list are SoftMed facilities while half of the "Top 10 Most Connected Healthcare Facilities"[3] use SoftMed solutions.

SoftMed achieved top ratings and overall scores by KLAS for the dictation, transcription and speech recognition market segments and is ranked highest by MD Buyline for its dictation solutions. For more information, go to www.softmed.com.

[1]*US News and World Report*, July 2005; [2]H&HN, July 2005, [3] *Health Imaging*, September 2005.

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About This Guide

About ChartScript

Welcome to ChartScript®, one of several software products from the portfolio of comprehensive health information management solutions from SoftMed Systems, Inc.®

ChartScript is a central database for transcribing documents that works with a personal computer, connected to a network, running Microsoft® Windows® and Microsoft Word. SoftMed designed ChartScript to increase transcription productivity by providing an extensive interface to available demographic data from other systems. ChartScript is designed to be run and maintained by transcription and HIM personnel.

ChartScript is a tool for creating, editing, distributing, and managing transcribed medical documents that includes easy-to-use procedures, such as keyboard shortcuts for all commands and options. It provides quick access to documents that you can edit and reprint.

All ChartScript functions are organized into menu options that guide you through various steps in system operation. Each window shows you how to proceed through a clear and consistent set of options related to adding, editing, deleting, or displaying information on transcribed documents.

About This Guide

This guide is a supplement to your formal ChartScript training. It includes instructions for commonly used tasks such as searching for patient demographics and creating documents. Instructions for less frequently used tasks, such as maintenance procedures and reports, are in ChartScript Help.

Who Should Read This Guide

The User's Guide is for medical transcriptionists and support staff. It shows you the basics of searching, retrieving, creating, editing, printing, and importing documents in ChartScript.

Conventions Used in This Guide

The information in this guide is presented as step-by-step instructions. The steps are numbered, and they include illustrations that show what you should see on your computer monitor.

Microsoft Windows lets you do many actions in more than one way, such as choosing a command from a menu, clicking a toolbar button, or typing keys on the keyboard. The Appendix provides instructions for using the keyboard and the mouse.

You will also find these other visual cues throughout the guide:

Convention	Usage	Examples
SMALL CAPS	Represents a keyboard key name	Press ENTER. Press ESC.
Bold type	Names of menus, commands, and buttons	From the **File** menu, select **Exit**.
Italic type	Place holders for user input, document names	Type *password*. *ChartScript User's Guide*
ALL CAPITALS	Device names and acronyms	COM1 JCAHO

Where to Find More Information

If you need more information about specific windows or fields, you can use the ChartScript Help as explained in Appendix A, "Microsoft Windows Basics." You may also consult the ChartScript electronic documentation library, as explained in Chapter 2, "ChartScript Basics."

For additional assistance, contact the Client Support Center at:

<div align="center">1-800-234-0422</div>

Standard support is available Monday through Friday 8:30 A.M. to 8:30 P.M. eastern time.

SoftMed 24-hour emergency support is available for facilities with an extended support contract. If your facility does not have extended support, consult your system administrator or SoftMed contract for information on billing policy and rates.

When you call, please be at a workstation and be prepared to provide the following information:

❒ Product version number, date, and time. (From the **Help** menu, select **About ChartScript**.)
❒ Type of computer hardware you are using.
❒ Windows version and type of network environment.
❒ Names of other programs or memory-resident programs running on the workstation when the problem occurred.
❒ Exact wording of any messages on your monitor.
❒ What you were doing when the problem occurred and whether you can reproduce the problem.

❒   How you tried to solve the problem.

If you want information on other SoftMed products, contact SoftMed Sales and Marketing at:

1-800-695-4447

Microsoft Word Setup

Verifying Word Settings

The Microsoft Word settings for AutoRecover and Spelling & Grammar should have to be verified only once. To ensure that these options are set permanently for your workstation, SoftMed recommends opening Microsoft Word independently of ChartScript and then performing the steps listed in the sections that follow.

Enabling AutoRecover

As you transcribe, Word can periodically save a temporary copy of your document as a safety measure. If your workstation or Word stops responding while you are working on the document because of an error, lock-up, or power outage, Word opens the AutoRecover copy of the document when you start Word again. This recovered document contains your changes up through the last time the temporary copy was saved by Word. You can specify if and when Word saves these AutoRecover copies of your documents.

♦ **To enable AutoRecover**

1. From the **Tools** menu, select **Options**.

2. On the Options window, select the Save tab. Select the **Save AutoRecover info every** check box and clear all other check boxes.

3. In the **minutes** field, type 2. Select **OK**.

Note: SoftMed recommends a two-minute save interval so that the most you can lose of a document is what you typed in the last two minutes before the problem occurred.

See the "Retrieving Interrupted Documents" section of Chapter 7 for instructions on retrieving AutoRecover files.
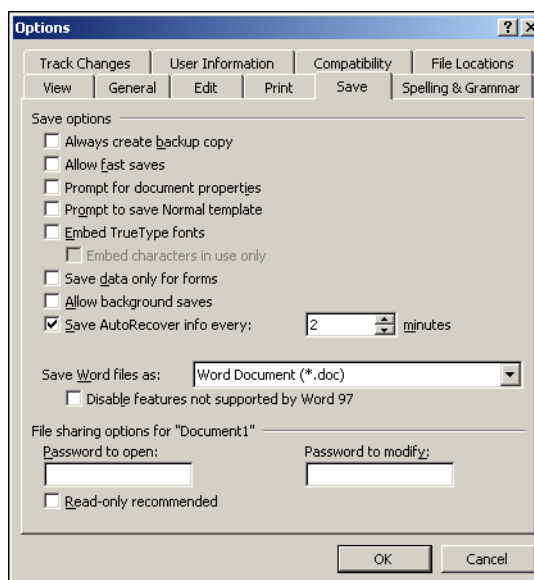
Defining the AutoRecover Location

You must specify the folder in which Word stores AutoRecover copies of your documents while you are transcribing. Knowing the location of this folder on your workstation may assist you in retrieving AutoRecover files, should a problem occur.

♦ **To define the AutoRecover location**

1. From the **Tools** menu, select **Options**.

2. On the Options window, select the File Locations tab. From the File types list, select **AutoRecover files.** Select **Modify**.

3. On the Modify Location window, in the Folder name field, type C:\Softmed\Ssiapps\Scr. Select **OK**.

See the "Retrieving Interrupted Documents" section in Chapter 7 for instructions on retrieving AutoRecover files.
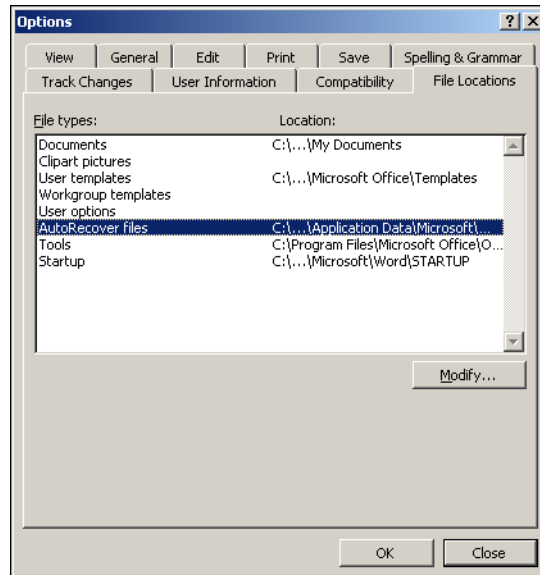
Setting Spelling and Grammar Options

You must specify whether Word should automatically check the spelling of words in your documents, including words in uppercase. You can also specify whether you want Word to check the grammar in your documents. See the "Checking Spelling and Grammar" section on page 4-13 to learn how to run spelling and grammar check on a document.

♦ **To set spelling and grammar options**

1. From the **Tools** menu, select **Options**.
2. On the Options window, select the Spelling & Grammar tab.

3. On the Spelling & Grammar tab, under Spelling, select **Check spelling as you type**. Clear the **Ignore words in UPPERCASE** check box. If you do not want Word to check the grammar in your documents, under Grammar, clear the **Check grammar as you type** check box. Select **OK**.

Because many providers use a style in which sections of their dictation are phrases and sentence fragments, many transcriptionists find that grammar check is not helpful. Grammar check stops on many areas of the document that are not complete sentences, even though they are stylistically correct for medical documentation.
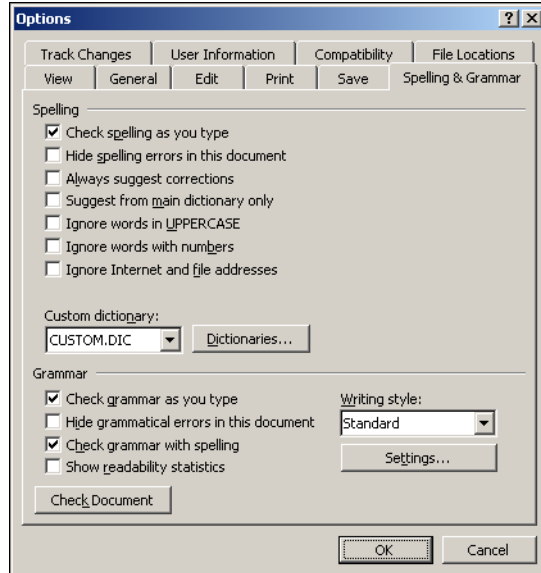
Turning off an AutoCorrect Setting

Transcriptionists who transcribe using Microsoft Word 2000 should verify that the Automatically use suggestions from the spelling checker check box is turned off on their workstation. This parameter may conflict with the ChartScript abbreviation expander, causing abbreviations to expand incorrectly.

♦ **To turn off the Automatically use suggestions from the spelling checker check box**

1. From the **Tools** menu in Microsoft Word, select **AutoCorrect**. Select the AutoCorrect tab.

2. At the bottom of the window, clear the **Automatically use suggestions from the spelling checker** check box.

3. Select **OK** to return to the document.
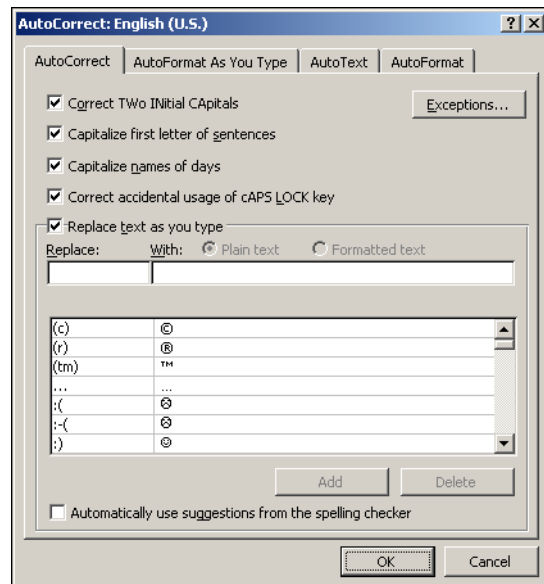
Editing the Word Custom Dictionary

ChartScript uses the Word spelling and grammar check features when creating or editing documents. The spell check feature in Word enables you to add words to a custom dictionary file so that they are considered correct in the future. If you add a word to the custom dictionary that should not be saved there, use the following procedure to remove it. See the "Checking Spelling and Grammar" section on page 4-2 to learn how to run spelling and grammar check on a document.

Note: Make sure that Word is maximized on your workstation before beginning to work with ChartScript.

♦ **To remove a word from the Word custom dictionary**

1. From the **Tools** menu, select **Options**.

2. On the Options window, select the Spelling & Grammar tab. Select **Dictionaries**.

3. On the Custom Dictionaries window, select **CUSTOM.DIC** from the list of all the custom dictionaries available on your workstation.

4. Select **Edit**. On the dialog box that appears, select **OK**.

5. The custom dictionary opens as a Word document. Add, remove, or edit words from the custom dictionary.

6. When you have finished changing your custom dictionary, click the appropriate X in the upper-right corner of the window:

   ▪ If you are using Word 2000, single-click the X.

7. On the dialog box that appears, select **Yes**. Word saves the custom dictionary and returns to the ChartScript document.

Word deactivates automatic spell checking while the custom dictionary is being edited. You must reactivate automatic spell checking when you return to your document.
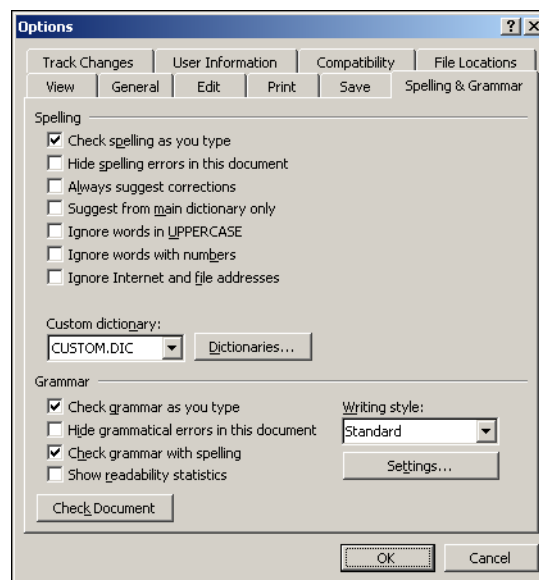
♦ **To reactivate automatic spell checking**

1. From the **Tools** menu, select **Options**.

2. On the Options window, select the Spelling & Grammar tab.

3. Select **Check spelling as you type**. Select **OK**.

4. Complete your ChartScript document, run spell check, and save as usual.

ChartScript Basics
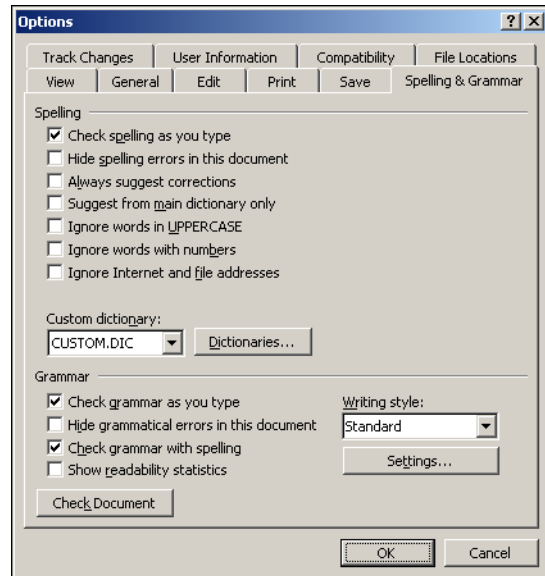
Starting ChartScript

The first time you start ChartScript, you must create a central user name and password, and then link your central user name to your ChartScript user name.

♦ **To start ChartScript for the first time**

1. Start SSIMenu.

2. On the Login window, select **Create Login ID**.

3. On the New Central Login ID window, type a new login ID, your first name, and your last name. Type a password in the **Password** and **Confirm Password** fields. Select **OK**.

   Note: Use this login ID and password the next time you start SSIMenu.

4. On SSIMenu, select **ChartScript**.

5. On the ChartScript Login window, type your ChartScript password and then select **OK**.

   Note: If your SoftMed system has been converted, your old password should still be active. If you are a new user, your ChartScript administrator must tell you your password.

7. On the Link to Central User Table dialog box, confirm that you are linking to the correct ChartScript user and select **Yes**. If you are not linking to the correct user, select **No** and try entering your ChartScript password again.

♦ **To start ChartScript after the first time**

1. Start SSIMenu.
2. On the Login window, in the **User ID** and **Password** fields, type the login ID and password you created in Step 3 on the previous page. Select **OK**.
3. On SSIMenu, select **ChartScript**. The ChartScript main window appears.

The ChartScript Main Window

Menu bar: Click a menu name to see commands

Toolbar: Click to use commands

Hints for using this window

Name of current user
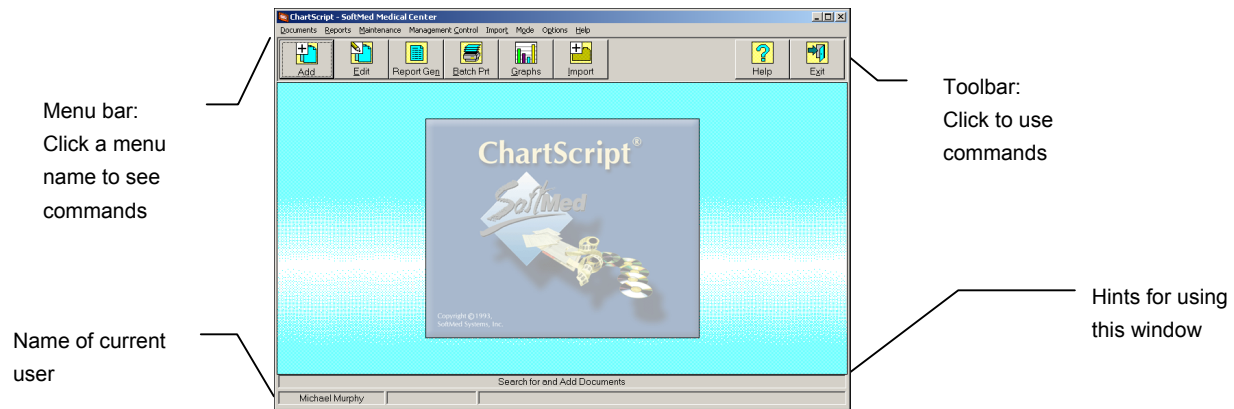
ChartScript Electronic Library

SoftMed provides access within its programs to all documentation available about those programs. ChartScript includes an electronic library that enables you to view all ChartScript documents using Adobe Acrobat® Reader™ version 4.0 or higher. Items included in the library are usually documents that were created in paper format. Acrobat Reader enables you to view the documents online or to print paper copies.

Adobe Acrobat Reader version 4.0 or higher must be installed on your workstation in order to use the ChartScript online library. If it is not, contact your system administrator.

♦ **To view documents electronically**

1. From the **Help** menu, select **ChartScript Library**.

2. Adobe Acrobat Reader opens a menu of documents available for ChartScript. From the ChartScript document list, select the document you want to view.

The date the document was last updated appears in parentheses to the right of the document name. If you already have a paper copy of the document, check the revision date on the inside of the front cover. If this date is older than the date in the library, you may want to print a new copy to ensure that your copy is up to date.
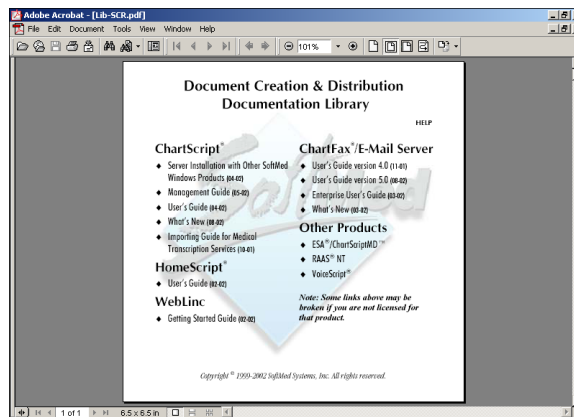
Using ChartScript Help

ChartScript provides a complete Help system that includes step-by-step procedures for users and administrators, along with detailed reference information about windows and fields.

Use the **Help** menu to display the Help Topics window. From this window, you can browse the table of contents, check the index, or display a list of topics containing a specific word or phrase.
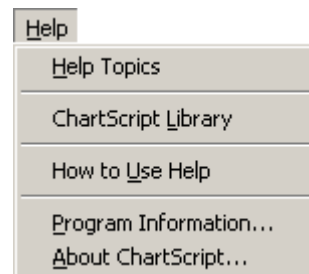
Displaying ChartScript Help

♦ **To display ChartScript Help by using the keyboard**

1. Press ALT to make the menu bar active.
2. Press H to open the **Help** menu.
3. Press H to display the Help Topics window.

♦ **To display ChartScript Help by using the mouse**

1. From the **Help** menu, click **Help Topics**.
2. Click Contents.

Contents Tab

Use the Contents tab to see a list of all topics organized by categories. The main categories appear in the following table:

Topic Category	Description
Welcome	A basic description of the product.
Basics	Basic skills necessary to work with this SoftMed program.
Using	Tasks specific to the product.
Managing	Tasks that only managers or authorized users have rights to perform.
Product Tour	Descriptions of windows, menus, and toolbars.
FAQs	Frequently asked questions
Troubleshooting	Suggestions to resolve typical problems.
Contact Us	How to contact SoftMed for support or to give feedback.

♦ **To display a topic from the Contents tab**

1. Double-click a book to display the topics.
2. Double-click the topic that you want to see.

Index Tab

Use the Index tab to see a list of topics and related terms in alphabetical order.

♦ **To find a topic on the Index tab**

1. Do one of the following:
   - Type the word you are looking for. The index tab automatically moves to the listing that matches the text you type.
   - Scroll through the list of topics.
2. To display the topic, double-click the topic.

Find Tab

Use the Find tab to list all topics that contain a specific word or phrase.

Note: The first time you use the find feature, select **Maximize Search Capabilities**, select **Next**, and then select **Finish**.

♦ **To find topics that include a specific word or phrase**

1. Type the word you want to find. ChartScript Help may show matching words (plurals, different capitalization) that you can choose from to narrow your search.
2. The Find tab displays the topics that contain the words you typed. Select a topic and select **Display**.

Note: For more information on using and selecting options for the Find tab, select **How to Use Help** from the ChartScript **Help** menu.

Moving Between Help Window Tabs

♦ **To move between Help window tabs by using the keyboard**

❒ Do one of the following:

■ Press tab until the open tab is selected and then press the right arrow key or left arrow key to open a new tab.

■ Press and hold ctrl and then press tab until the tab you want to view opens.

♦ **To move between Help window tabs by using the mouse**

❒ Click the tab you want to open.
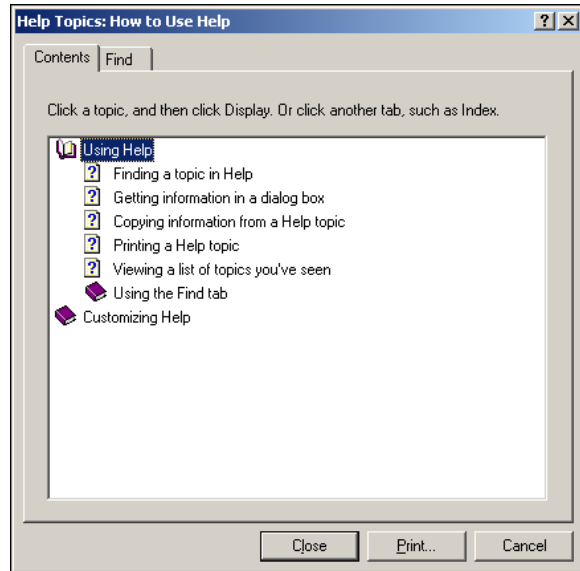
Printing Help Topics

♦ **To print a help topic**

❒ In an open topic, do one of the following:

■ Select **Print**.
■ Select **Options** and then **Print Topic**.
■ Right-click the topic and select **Print Topic**.

Note: You can also select a topic on the Contents tab and select **Print**.

♦ **To print multiple topics**

1. On the Contents tab, select a book that includes several topics.
2. Select **Print** to print all topics under the selected book.

Pop-ups are the informational boxes that appear when you click on a green link.

♦ **To print a popup**

❒ Right-click the popup box and select **Print Topic**.

Customizing ChartScript Help

♦ **To change the font size**

1. On a help topic, select **Options** or right-click the topic box.
2. Select **Font**, and then select the font size.

♦ **To change where ChartScript Help appears**

1. On a help topic, select **Options** or right-click the topic.
2. Select **Keep Help on Top**. Select **On top** to keep the help topic on top of other windows. Select **Not on Top** to keep the help topic behind other windows.
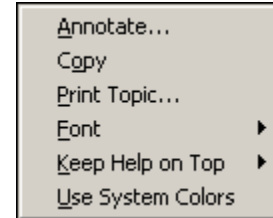
The annotate feature provides a way for you to customize a Help topic so that information specific to your facility is available. For example, you may want to add some tips for typing patient demographic information. After a note is created, it may appear to all users who access the Help system. Check with your ChartScript administrator to find out whether other users at your facility can view your Help annotations.

♦ **To create a note**

1. Open a Help topic.
2. Do one of the following:
   - Right-click and select **Annotate** from the menu.
   - From the **Options** menu, select **Annotate**.
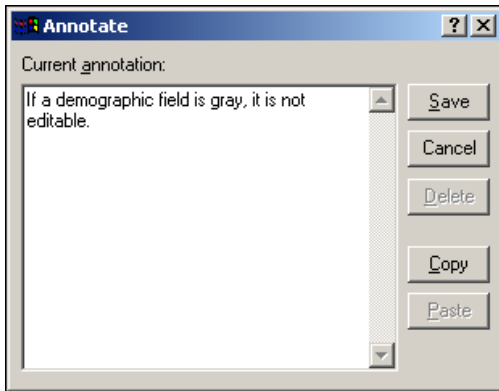
3. On the Annotate window, type a note, and then select **Save**.

A paper clip icon appears at the top of the topic indicating that a customized note exists.

♦ **To read a note**

1. Open a Help topic.
2. Click the paper clip to display the text entry box where the note was typed.
3. If needed, select **Delete** to erase the note.
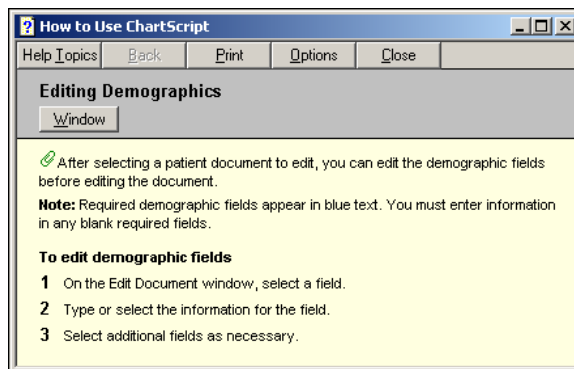
♦ **To read more information on using ChartScript Help**

1. From the ChartScript **Help** menu, select **How to Use Help**.
2. On the Contents tab, expand the Using Help category.

Displaying the Login Window

If you must leave your workstation but do not want to quit ChartScript completely, you can log out of ChartScript to protect confidential information. Displaying the Login window ends a ChartScript session without completely exiting the program.

♦ **To display the login window**

❒ From the **Options** menu, select **Log In**. The ChartScript Login window appears.

Changing a Central User ID or Password

You can change your current password and user information. If you do not remember your current password, a manager must change your password in the Central User Table using a different procedure.

♦ **To change your password or user information**

1. On SSIMenu, from the **Options** menu, select **Change User Info**.
2. On the Modify Central User Information window, change any of your central user ID information.
3. Select **OK** when you are finished.

Quitting ChartScript

♦ **To quit ChartScript**

1. On the ChartScript toolbar, select **Exit**.
2. On the dialog box that appears, select **OK** to close the ChartScript window and return to SSIMenu.

The rest of this guide provides specific information about using basic ChartScript functions. More information about using ChartScript is available in ChartScript Help.
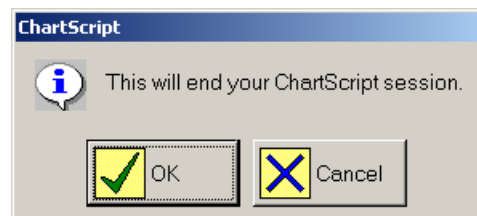
CHAPTER 3

Searching for Patient Records

There are many different sources that ChartScript can search when creating or editing a document. This chapter reviews all of them.

ChartScript provides four ways to search for patient records:

❒ Using the ChartScript search feature. ChartScript will search for additional demographic information in ChartLinc, ChartID, ChartFact, ChartLocator, and ChartScript. Your ChartScript administrator determines whether and in what order these programs are searched.

❒ Using the SoftMed Digital Dictation System Interface (DDSI)

❒ Using the SoftMed VoiceScript dictation system

❒ Using ChartScriptMD records

> Because each facility has its own procedures, check with your ChartScript administrator for details on how your facility is set up.

You can search for patient records using the following fields:

❒ Order Number

❒ MR Number

❒ Billing Number

❒ Patient Name

❒ Date of birth

Notes:

■ Date of Birth must be an indexed field in the patient interface to use this field as a search field. Please contact a SoftMed Systems representative to make this change.

■ Select **Soundex** to search for patient names with similar spellings. For example, if you type Smith and select **Soundex**, ChartScript finds similar spellings such as Smythe.

■ If your facility has SQL Orders enabled, the Order Number field will be replaced by a SQL Order Numbers field when searching in add and edit mode.

Some facilities use the following additional demographics:

❑ EPI Number
❑ Facility Code

Using the ChartScript Search Feature

♦ **To use the ChartScript search feature**

1. From the ChartScript toolbar, select **Add**.

2. On the Search for and Add Documents window, do one of the following:

   ■ To search for a dictation record, select **DDSI** (F5). Go to the DDSI section of this chapter to complete your search.

   ■ To search for a ChartScriptMD record only, select **ChartScriptMD** (F6). If your facility uses VoiceScript also, select **VoiceScript** (F6) to search for a ChartScriptMD or VoiceScript record. Go to the "ChartScriptMD" and "VoiceScript" sections of this chapter to complete your search.

   ■ To search the patient interface, ChartScript, ChartFact and ChartLocator, or ChartID, type your search criteria into the fields and select **Search** (F4). Go to the section corresponding to each product to complete your search.
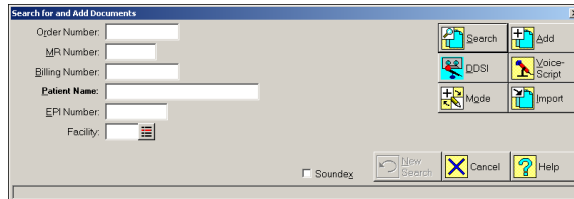
The sections that follow describe the different windows that appear depending on the databases that ChartScript searches for patient records.

You may search the patient interface for patient and visit information. If your facility does concurrent chart analysis, you may search ChartFact and ChartLocator for patient information. If you want to copy demographic information from an existing document to a new one, you may search ChartScript. The sequence of these searches depends on your facility's preferences. Contact your ChartScript administrator for details.

Note: A couple of shortcuts that can make your search easier are the following. To clear all search fields, select CTRL+SHIFT+C. To recall your last successful search (the last search that produced results) in the current session, select CTRL+L.

Searching for DDSI Jobs

If your facility uses DDSI, use this procedure to search for dictation jobs. If your facility does not use DDSI, disregard this section.

♦ **To search DDSI**

1. From the toolbar, select **Add**.

2. On the Search for and Add Documents window, select **DDSI (F5)**.

   One of the following occurs:
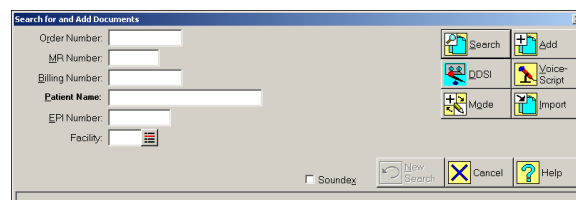
- If only one job is found that is assigned to you, ChartScript automatically selects the job, searches for a patient interface record, and displays the Add a Document window.

- If multiple jobs are found that are assigned to you, the Jobs Assigned to You window appears. Select a dictation job and then select **OK** to create the document.
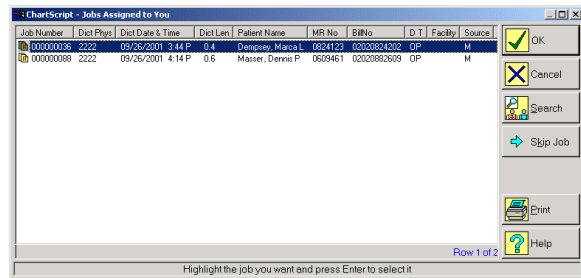
- If no jobs are assigned to you in the DDSI queue, the prompt appears at left appears.

  Select **Search**. Type your search criteria into one of the three fields and select **Search**. Select a job from the search results and select **OK**. The Add a Document window appears.

  If a DDSI job for your ID enters the queue, this window disappears and the Dictation Jobs Assigned to You window appears. To search for a job manually, select **Search** and the Search Dictation Interface window appears. Type your search criteria and select **Search**.

  > Facilities using a Lanier digital dictation system version prior to version 7.3 are not automatically assigned jobs and must search by job number.
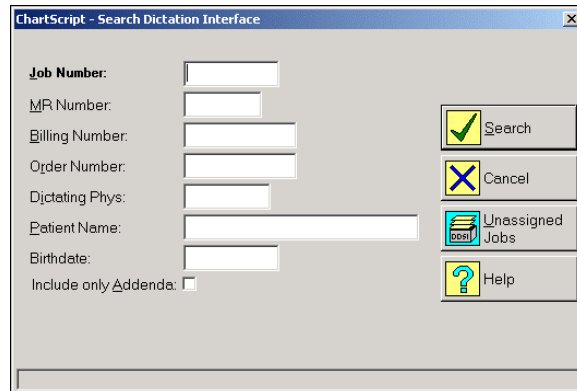
Note: Select **Unassigned Jobs** to view all unassigned DDSI jobs. Your ChartScript administrator defines which transcriptionists can view all DDSI jobs.

Searching by Order Numbers

If your facility uses VoiceScript or ChartScriptMD and types documents that have order numbers associated with them, such as radiology or cardiology, the **Order Number** field will change to **Order Numbers**.

Searching for Jobs from ChartScriptMD

If your system also has VoiceScript, skip to the next section on searching for jobs from VoiceScript for information on how to retrieve ChartScriptMD jobs. If your facility does not use ChartScriptMD, disregard this section.

♦ **To search ChartScriptMD**

1. From the toolbar, select **Add**.
2. On the Search for and Add Documents window, select **ChartScriptMD** (F6).
3. One of the following occurs:
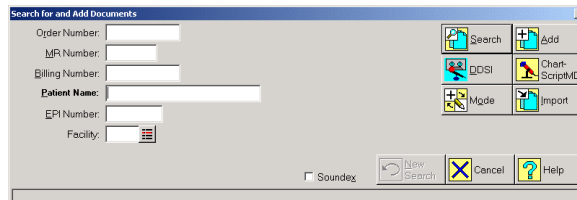
   - If only one job is found that is assigned to you, ChartScript automatically selects the job, searches for patient demographics, and displays the Add a Document window.

   - If no jobs have been assigned to you, the Search Dictation Interface window appears, enabling you to search by Job Number or other criteria.

   - If multiple jobs are found that are assigned to you, the Jobs Assigned to You window appears. **Note**: The Addm column indicates if the job is an addendum.
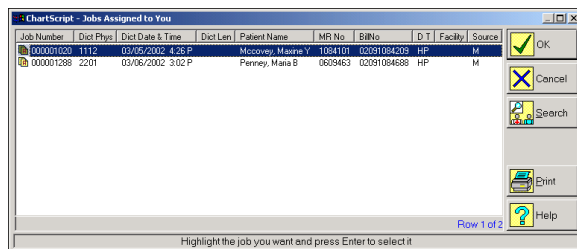
4. On the Jobs Assigned to You window, you have the following options:

   - Select **Search (F5)** to display the Search Dictation Interface window, where you can perform the standard search for patient information in SoftMed databases. You also can filter the search results to include only jobs that are addenda.

   - Select **Print** to display the Printer Setup window, where you can print the list of ChartScriptMD jobs.

   - Select **OK** to create the document.

If the job you selected includes dictation, the dictation player appears also. You can listen to the job now or after you begin transcribing. The player remains visible until you save the document and can be moved around the desktop.
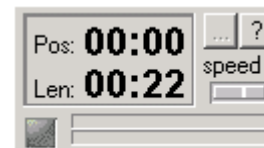
Select **?** in the upper right corner of the dictation player dialog box to view a help window that lists keyboard commands for operating the dictation player. Select **OK** to close the WavePlayer Help window.

- Select **Add** (F3) to complete the displayed document.
- Select **Search** (F4) to perform the standard search for patient information in SoftMed databases.
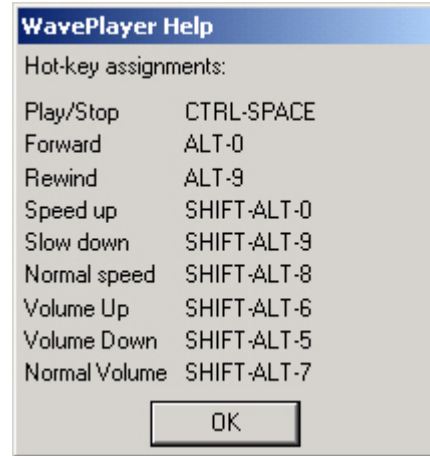
Searching for VoiceScript Dictation Jobs

If your facility uses ChartScriptMD and VoiceScript or VoiceScript alone, follow this procedure to search for ChartScriptMD or VoiceScript jobs to complete. If your facility does not use VoiceScript, disregard this section.

♦ **To search ChartScriptMD and VoiceScript (or VoiceScript alone)**

1. From the toolbar, select **Add**.

2. On the Search for and Add Documents window, select **VoiceScript (F6)**.
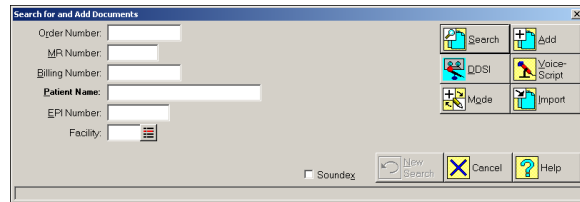
3. On the Playback Preference dialog box, select the method by which you will listen to dictation. Select from one of four options:

   Note: Contact your ChartScript administrator if you are unsure about which option to select.
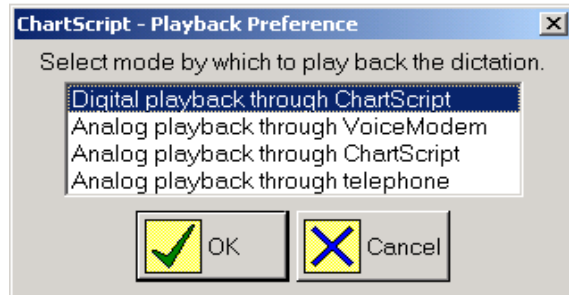
- **Digital playback through ChartScript**. This is the default and the most commonly used of the three options. By selecting this option, a dictation player appears, enabling you to listen to dictation from your workstation.
- **Analog playback through Voice Modem.** Select this option if you listen to dictation through a telephony device by dialing up using a voice modem. With this option, you can specify your own VoiceScript settings from the Options menu. See Appendix F, "VoiceScript Settings" for more details.
- **Analog playback through ChartScript**. Select this option if you listen to dictation through ChartScript using an analog phone. Playback is controlled through the foot pedal or keystrokes made on the workstation.
- **Analog playback through telephone**. Select this option if your facility is

configured to listen to dictations using a telephony device. Playback is controlled through the telephone.

If you select the Digital Playback through PC option, follow the information after Step 4 in the previous "Searching for Jobs from ChartScriptMD" section to continue adding a document.

4. One of the following occurs:

- If only one job is found that is assigned to you, ChartScript automatically selects the job, searches for a patient interface record, and displays the Add a Document window.

- If multiple jobs are found that are assigned to you, the Jobs Assigned to You window appears. Select a dictation job and then select **OK** to create the document. **Note**: The Addm column indicates whether the job is an addendum.

- If there are too many records to display, a message appears and you must narrow your search criteria.

Using Patient Interface Record Search Results

If your facility uses ChartLinc or a batch patient download, and ChartScript finds interface records from your facility's mainframe that match your search criteria, the Patient Interface Records Found window appears. If your facility does not use ChartLinc or a batch patient download, disregard this section.
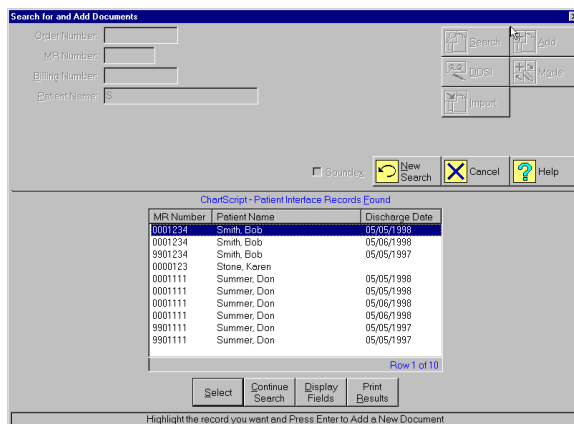
Following is a description of the toolbar buttons on the Patient Interface Records Found window.

Button	Description
Select	Selects the demographic information in the selected interface record.
Continue Search (F4)	Continues the search for patient records in other SoftMed programs.
Display Fields (F5)	Displays the Interface Record Fields window, which displays the demographic information in the selected interface record.
Print Results	Displays the Printer Setup window, which enables you to print the list of records on the Patient Interface Records Found window.
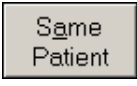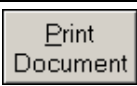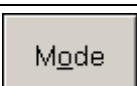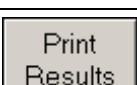
Using ChartScript Search Results

If ChartScript finds documents in the ChartScript database with demographic information that matches your search criteria, the ChartScript Documents Found pane appears on the lower portion of the Search for and Add Documents window.

Note: To sort the list of documents found by a different field, click on the column heading of the desired field.

Following is a description of the toolbar buttons on the ChartScript Documents Found pane.

Button	Description
Same Record (F5)	Selects the demographic information in the selected document. This button copies information only from the fields that should not change during the patient's current visit, such as admission date and patient type.
View Document (F2)	Displays the contents of the selected document. You cannot edit the document, but you can copy the document's text to the clipboard.
Same Patient (F3)	Selects the demographic information in the selected document. This button copies only information from the fields that should not change throughout the life of the patient, such as birthdate or Social Security number.
Continue Search (F4)	Continues the search for patient records in other SoftMed programs.
Info (F6)	Opens the Fields, CCs, and Orders window, which displays the selected document's demographic information and printing details.
Print Document (F7)	Reprints the selected document. You select to print either originals and extra copies, or carbon copies.
Batch Flags (F8)	Enables you to view and set the original and extra copies or carbon copies batch flags of the selected document.
Mode (F9)	Enables you to switch to Edit mode.
Print Results	Opens the Printer Setup window, which enables you to print the list of documents on the ChartScript Documents Found pane.

The following sections describe how a transcriptionist uses the buttons on the toolbar.

Copying Demographic Fields for the Same Visit

When you select this button, the values in the demographic fields in the document you selected on the ChartScript Documents Found window are copied to the corresponding fields of the new document. The demographic fields copied are specified by your ChartScript administrator. These fields should include patient and visit information that does not change during the same visit. For example, a patient's admitting physician and billing number usually remain the same throughout a visit. This information can be copied from an existing document to a new document using **Same Record**.

Viewing Documents

You can view a document without opening it in Word. Use this function if you want only to review a document's text. The document cannot be edited, but you can copy the document's text to the clipboard. The document does not appear like it does when printed. For example, heading information may not appear and the signature line area may look different.

♦ **To view a document**

1. On the ChartScript Documents Found window, select a document from the list. Select **View (F2)**.

2. On the Viewing window, click ![search icon] to find text in the document. Click ![copy icon] to copy selected text to the clipboard.

3. Select **Close** to close the window.
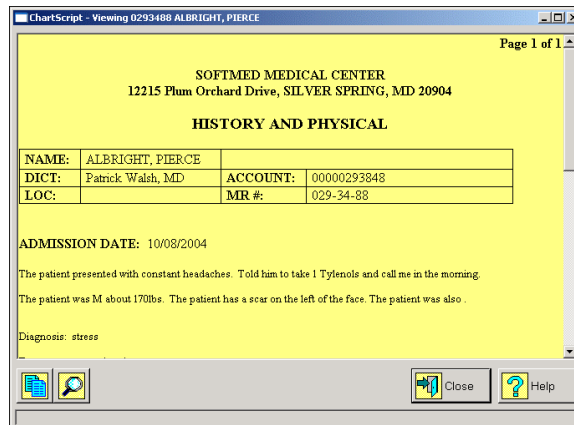
Copying Demographic Fields for the Same Patient
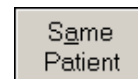
When you select this button, the values in the patient demographic fields in the document you selected on the ChartScript Documents Found pane are copied to the corresponding fields of the new document. The demographic fields copied are specified by your ChartScript administrator. These fields should include only patient information that does not change from one visit to the next. For example, a patient's medical record number and name usually remain the same between visits. This information can be copied from an existing document to a new document by selecting **Same Patient**.

Continuing the Search for Patient Records

When you select this button, ChartScript continues to search for patient
records that match your search criteria in other databases, depending on the SoftMed
programs your facility uses. Your ChartScript administrator determines whether and in
what order these other databases are searched.

Displaying Document Information

When you select this button, you can display a document's demographic
and print information. Use this feature to determine who last edited a document, when
the document was last edited, the status of carbon copies distribution, whether a
document is waiting to be batch printed, and so on.

♦ **To display document information**

1. On the ChartScript
   Documents Found window,
   select a document from the
   list. Select **Info** (F6). The
   Fields, CCs, and Orders
   window appears. Use the
   scroll down arrow to view
   additional information about
   the document.
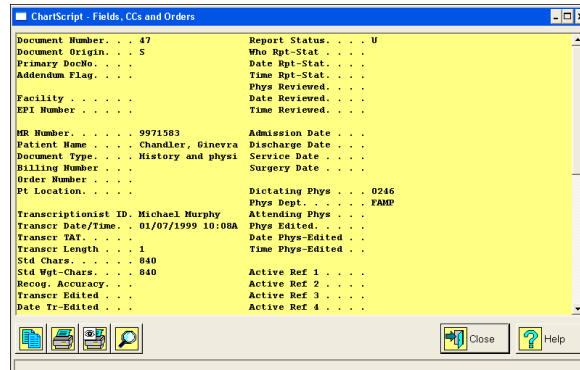
2. On this window, you can do
   the following:

   ▪ Select **Play Dictation** to play the dictation associated with this document.
     This button is only available if your facility is licensed for VoiceScript.

   ▪ Select **Display Orders** to display order information for this document. This
     button is only available if your facility has activated SQL orders.

   ▪ Select [icon] to copy the contents of the window to the clipboard, or to copy
     the selected text to the clipboard.

   ▪ Select [icon] to print the contents of the Fields, CCs, and Orders window or to
     print the selected text in the window.

   ▪ Select [icon] to preview the contents of the Fields, CCs, and Orders window,
     or the selected text in the window, before printing.

   ▪ Select [icon] to perform a case-sensitive search for text.

3. Select **Close** to close the window.

Reprinting Documents
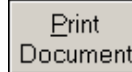
You can choose to reprint a document after it has been created, saved, or printed. You select to reprint either original and extra copies, or carbon copies.

♦ **To reprint an original or extra copy**

1. Select the document that you want to reprint and select **Print Document (F7)** from the toolbar at the bottom of the window.

2. On the Reprint-Document Print Configuration window, in the What to Print section, select **Originals/Extra Copies**.

3. In the Print Rule for Originals/Extra Copies section, select the print rule that you want to use to reprint the document.

    Note: If a default print rule is associated with the document or its document type, that print rule is automatically selected and is marked by an asterisk (*) in the list of available print rules.
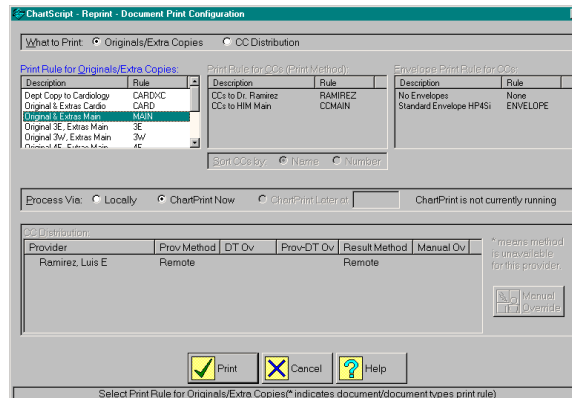
4. In the Process Via section, select one of the three options:

   - Select **Locally** if you want to bypass ChartPrint and process the print job on your workstation. This option requires that the printer being used is installed on your workstation.

   - Select **ChartPrint Now** if you want to send the reprint request to ChartPrint to be processed as soon as possible.

   - Select **ChartPrint Later at ___** if you want to send the reprint request to ChartPrint to be processed at a later time. This option allows you to indicate the time you want the document to be reprinted by ChartPrint.

5. Select **Print** to process the reprint job.

♦ **To reprint a carbon copy**

1. Select the document that you want to reprint and select **Print Document** from the toolbar at the bottom of the window.

2. On the Reprint-Document Print Configuration window, in the What to Print section, select **CC Distribution**.

3. In the Print Rule for CCs (Print Method) section, select the print rule that you want to use to reprint the document. This print rule is used to determine the placement of footer text on all carbon copies, regardless of the
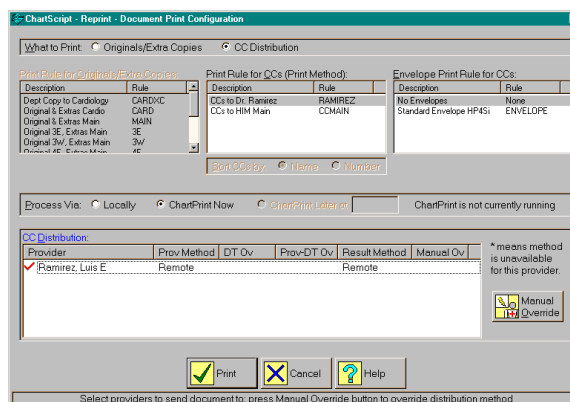
distribution method being used. It also determines the printer that will be used to print the document for providers that indicate Print as their document distribution method.

4. If the carbon copy you are reprinting will be generated using the Print distribution method, in the Envelope Print Rule for CCs section, select **No Envelopes** if you do not want to print an envelope with the carbon copy. If you want to print envelopes, select an envelope print rule.

5. In the Process Via section, select one of the three options:

   ▪ Select **Locally** if you want to bypass ChartPrint and process the print job on your workstation. This option requires that the printer being used is installed on your workstation.

   ▪ Select **ChartPrint Now** if you want to send the reprint request to ChartPrint to be processed as soon as possible.

   ▪ Select **ChartPrint Later at ___** if you want to send the reprint request to ChartPrint to be processed at a later time. This option allows you to indicate the time you want the document to be reprinted by ChartPrint.

6. In the CC Distribution section, click on the provider(s) for whom to generate a reprinted carbon copy.

7. The Result Method column indicates the default distribution method for the provider and document type based upon the current settings in ChartScript. If you want to generate this carbon copy using an alternative distribution method, select **Manual Override**.

8. On the Select Override Distribution Method dialog box, select the alternative distribution method and select **OK**. The alternative distribution method appears in the Manual Ov column.

9. Select **Print** to process the reprint job.
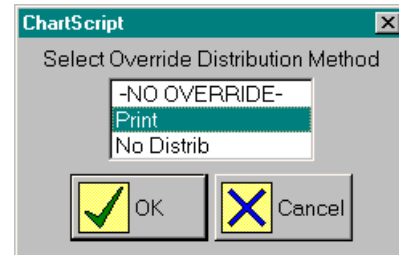
Setting Document Batch Flags
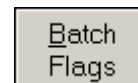
You can set the batch print flags for a document's original and extra copies or for a document's carbon copies. Setting a batch flag specifies that the document will be included in a batch print if the document's demographic information matches the batch print's selection criteria.

Removing a batch flag specifies that the document will not be included in a batch print. This feature might be useful if you want to reprint a document now and stop the document from printing later in a scheduled batch. In this example, you would reprint the document, then remove the document's batch flag.

♦ **To set a document's batch flags**

   1. On the ChartScript Documents Found window, select a document from the list. Select **Batch Flags (F8)**.

   2. On the Batch Print Flags dialog box, select the **Original/Copy** check box to set the batch flag for the document's original and extra copies. Select the **CC Distribution** check box to set the batch flag for the document's carbon copies.

Clear the check boxes to remove the batch flags.

3. Select **OK** to save your changes and close the dialog box.

Note: If the document does not include carbon copies, this button simply sets or removes the batch print flag for original and extra copies; the Batch Print Flags dialog box does not appear. For more information on printing documents, see the "Printing Functions" chapter in the *ChartScript Management Guide*.
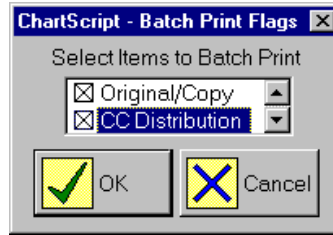
Switching to Edit Mode

Select this button to switch to Edit mode so that you can make changes to a selected document.

Printing the List of ChartScript Documents Found

You can print the list of ChartScript documents found that match your search criteria.
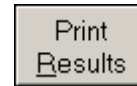
♦ **To print the contents of the ChartScript Documents Found window**

1. On the ChartScript Documents Found window, select **Print Results**.

2. On the Printer Setup window, select a printer and other print specifications.

3. Select **Print**.
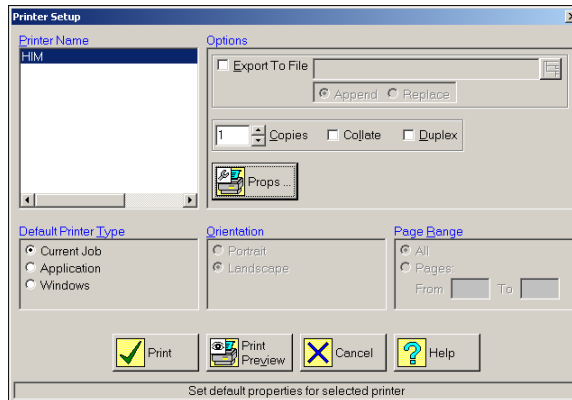
Using ChartFact and ChartLocator Search Results

If your facility uses ChartFact and ChartLocator, and ChartScript finds patient records in the ChartFact and ChartLocator database that match your search criteria, the following windows appear. If you search by patient name, ChartScript finds the name that you typed in ChartLocator. A window like the one shown at right appears.

If your facility does not use ChartFact or ChartLocator, disregard this section.
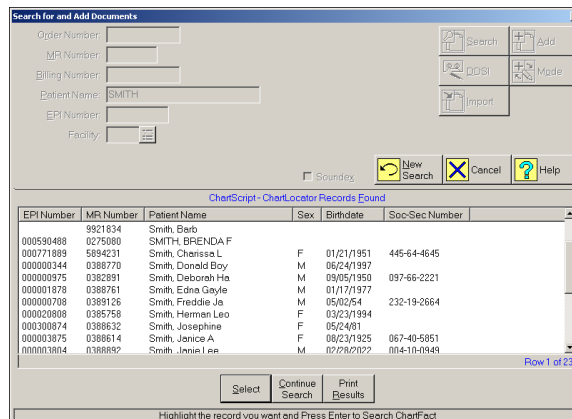
After you select the correct patient, ChartScript searches ChartFact, and a window similar to the one at right appears.

Following is a description of the toolbar buttons on the ChartLocator Records Found window.
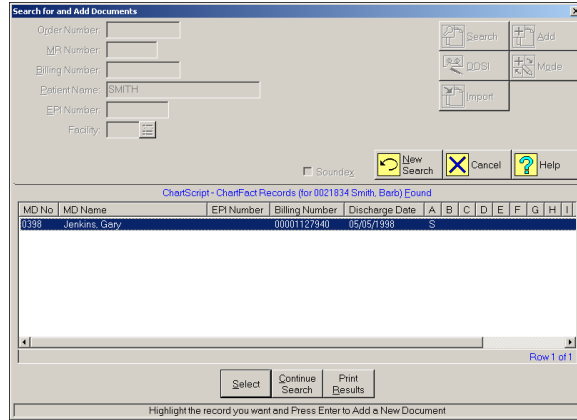
Button	Description
Select	Selects the demographic information in the selected ChartFact/Locator record.
Continue Search (F4)	Continues the search for patient records in other SoftMed programs.
Print Results	Opens the Printer Setup window, which enables you to print the list of documents on the ChartLocator Records Found window.

Using ChartID Search Results

If your facility uses ChartID, and ChartScript finds patient records in the ChartID database that match your search criteria, the ChartID Records Found window appears. If your facility does not use ChartID, disregard this section.
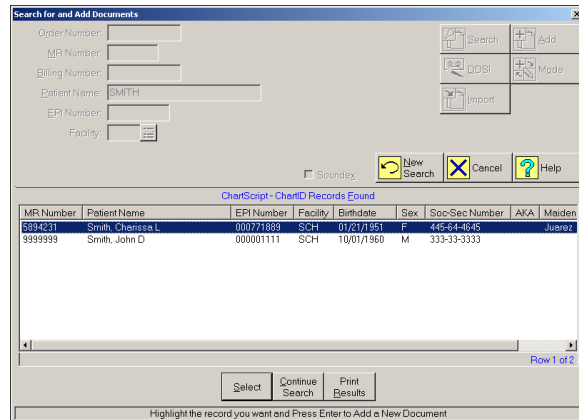
Following is a description of the toolbar buttons on the ChartID Records Found window.

Button	Description
Select	Selects the demographic information in the selected ChartID record.
Continue Search (F4)	Continues the search for patient records in other SoftMed programs.
Print Results	Displays the Printer Setup window, which enables you to print the list of documents on the ChartID Records Found window.

CHAPTER 4	# Creating a Document

This chapter will lead you through the process of creating a document in ChartScript.

Before you transcribe a document, ChartScript prompts you for three types of demographic information:

❐ Patient information, such as name and birthdate
❐ Visit information, such as admitting physician and admission date
❐ Dictation information, such as dictation date and time

Demographic information may already exist in a patient record in ChartScript or another database. Depending on the SoftMed programs your facility uses, ChartScript will search for any existing patient records based on search criteria you type. Refer to Chapter 3 for more information on searching.

Adding Documents Manually

If your search efforts yield no existing data on the patient you need, you can enter information manually.

♦ **To add a document without any prepopulated data**

1. From the ChartScript toolbar, select **Add**.
2. On the Search for and Add Documents window, select **Add** to add the document manually.

Completing the Demographic Information

After you select a patient record, the Document Type to Use for the Document window appears.

Note: If there are multiple visits for the selected patient, you are presented with a list of visits for the patient from which to choose.

♦ **To complete the demographic information**

1. On the Document Type to Use for the Document window, select the document type from the list. If the demographics source is DDSI or VoiceScript, the document type is available as part of the record. You can change the document type for DDSI records, but not for VoiceScript documents. Select **OK**.
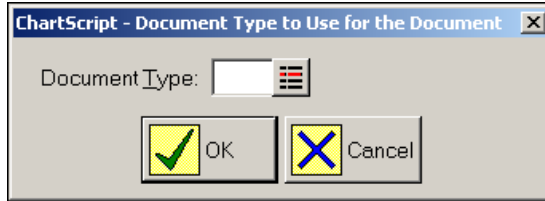
   Note: To see the list of available document types, press the spacebar or ![icon].
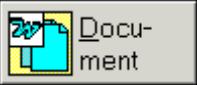
2. The Add a Document window appears. Depending on the patient record you selected, ChartScript copies values to some or all of the demographic fields. Type values in the appropriate blank demographic fields.

   Note Field names in blue are required.
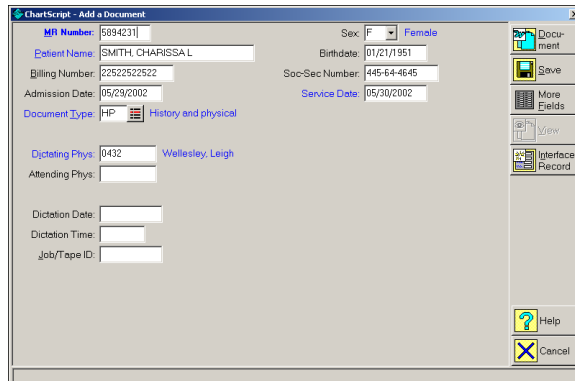
Instructions for populating various types of fields are found in the "Using Fields on Windows" section in Appendix A, "Microsoft Windows Basics."
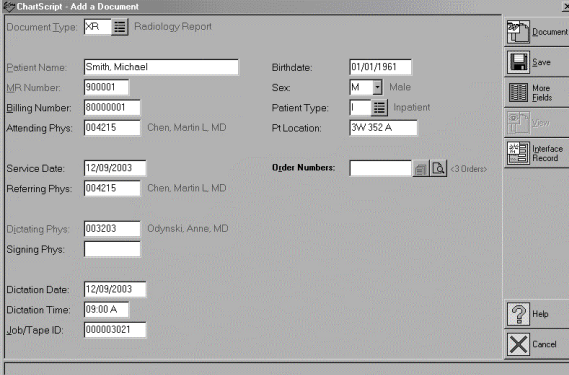
The table below describes the buttons on the Add a Document window.

Button	Description
![Document button]	Opens Word and creates the document using the demographic information entered on the window.
![Save button]	Saves the demographic information without creating the document.
![More Fields button] (F3)	Displays demographic information that has been suppressed.
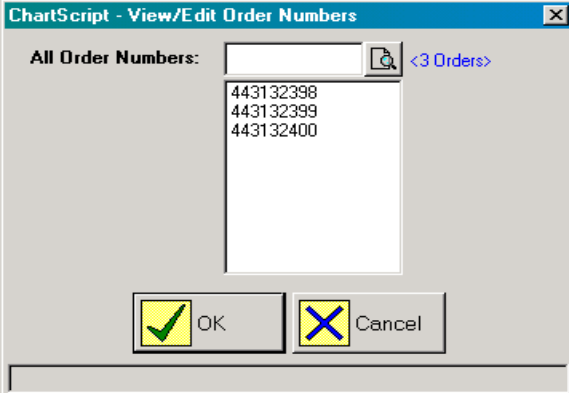
Button	Description
View	Displays the document on a viewer window.
Interface Record	Searches for an interface record and uses the information found to replace or populate the demographic information. This feature is particularly useful for locating visit-specific information that may have been missed or erroneously selected during the initial search. See the "Changing Document Demographics" section on page 6-4 for details.
Help	Displays ChartScript Help for this window.
Cancel	Closes the window without saving changes or creating the document.

Searching for Order Records
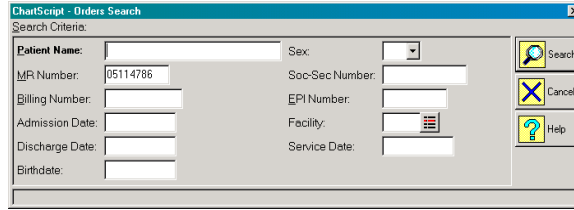
. When in the Demographics window, the **Order Numbers** field displays how many order numbers are associated with the document that you are creating.

Select ![icon] and the View/Edit Order Numbers window appears, where you can view or edit the order numbers associated with the document that you are creating.

Select and the Orders Search window appears, where you can search for order numbers to associate with the document that you are creating.
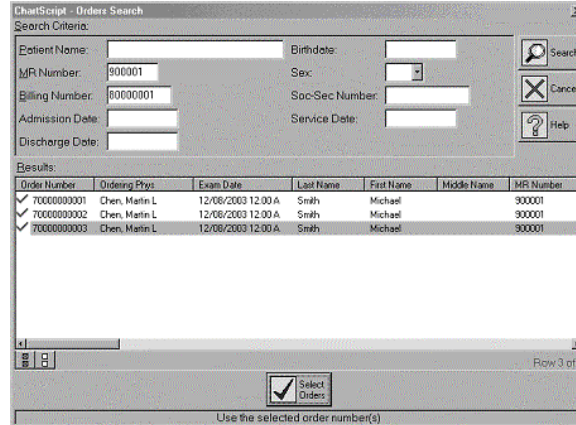
To select each order that is associated with the document that you are transcribing, select the row in the results section or use the up and down arrow keys and press spacebar. A red check mark appears next to the selected order records. Click **Select Orders** to return to the demographics window.
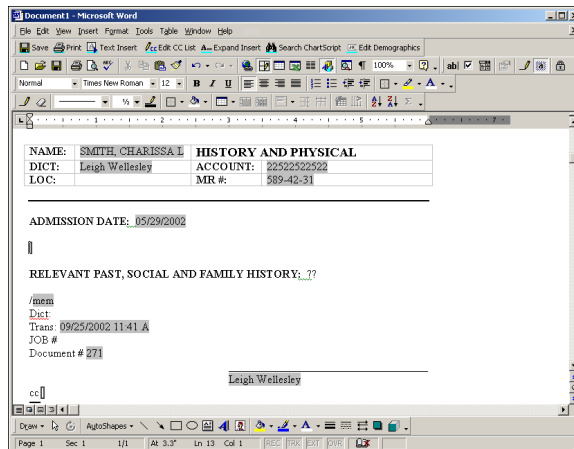
Starting Documents

After you select the document type and complete the demographic fields, you are ready to transcribe the document.

♦ **To start the document**

1. On the Add a Document window, select **Document**. Word starts and ChartScript merges the demographic information with the document template.

2. Type the document.

File Menu

The **File** menu in ChartScript replaces the Word **File** menu on the Word menu bar. The commands on this menu are available only when you enter Word using ChartScript. Use these commands when working with documents in ChartScript.

File	
Save Document...	Ctrl+S
Text Inserts...	Ctrl+N
Edit Abbreviations...	Ctrl+A
Edit Demographics...	Ctrl+D
CC List...	Ctrl+E
Insert Address...	Ctrl+R
View ESA Message...	Ctrl+L
Search ChartScript...	
Document Status...	Ctrl+O
Document Type...	
Paste: Document Type Text	
Print Document...	Ctrl+P
Print Preview	
Exit Document	
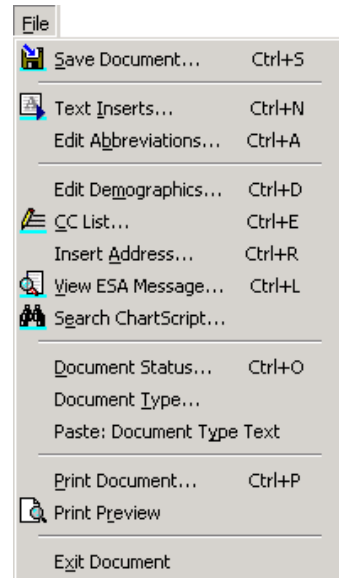
ChartScript Toolbar

The ChartScript toolbar provides easy access to the commonly used functions on the **File** menu. Each function is described in this chapter.

Save | Print | Text Insert | Edit CC List | Expand Insert | Search ChartScript | Edit Demographics
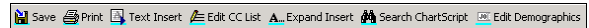
Editing Demographic Information

While you are transcribing a document, you may determine that an important demographic field is incorrect or blank, such as the service date or attending physician. To correct any missing or inaccurate demographic fields, use the **Edit Demographics** option.

♦ **To modify demographic fields**

1. From the **File** menu in Word, select **Edit Demographics** (CTRL+D). The Edit Document window appears showing the demographic information.

2. Make changes to the appropriate fields. If you suspect that you have chosen an incorrect patient interface record, select **Interface Record** and search for the correct information. See the "Changing Document Demographics" section in Chapter 6 for details.

3. After all changes have been made, select **Document**. The document reappears, displaying the newly corrected information.

Note: Do not attempt to change a demographic field by typing the correction directly into the Word document. The **Edit Demographics** function is necessary to ensure that the index used to search for the document is updated to match the contents of the document.

Editing the CC List

Use the **Edit CC List** option to add providers to and remove providers from the document's carbon copy list.

♦ **To add a provider to the CC list**

1. On the **File** menu in Word, select **Edit CC List** (CTRL+E).

2. On the CC List for Document window, in the **Physician** field, type a provider's number or all or part of the provider's last name.

   Note: To ensure a faster and easier search, type specific search criteria. For example, typing only "New" may retrieve several providers with last names that begin with "New" in the Select One Provider window. However, typing "Newman, P" retrieves fewer providers, making selection faster and easier.

3. Select a provider from the search results.

4. Select ⟩⟩ or press ENTER to add the provider to the CC list.

5. Select **OK**.
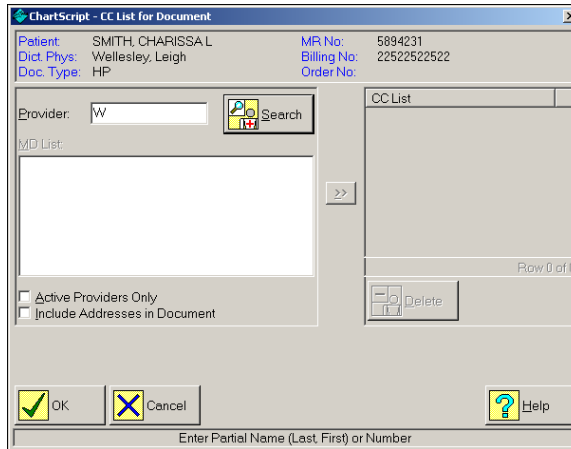
♦ **To remove a provider from the CC list**

1. Select a provider in the CC List box.

2. Select **Delete**.
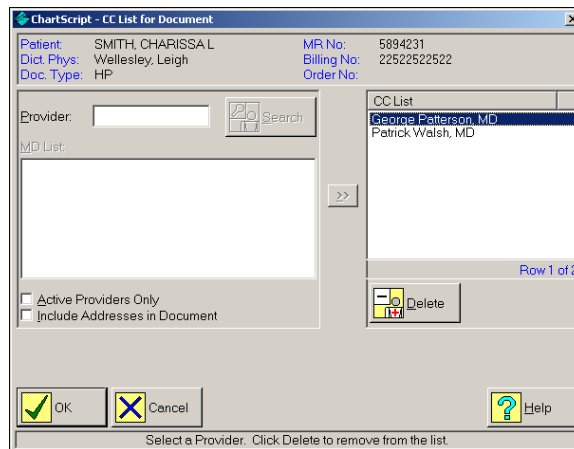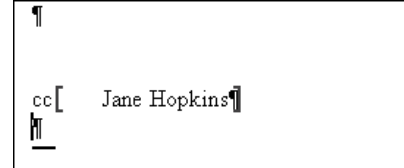
Non-ProviderID Copy Requests
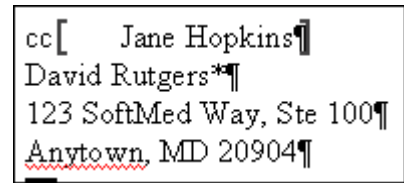
If a carbon copy is requested for a person or entity that is not found in ProviderID, the request must be added to the document.

♦ **To add a non-ProviderID physician to the CC list**

1. On the document, place your cursor on the first blank line after the CC list. It is important that the new entry is outside of the bookmark brackets for the CC list. **Note**: If your CC lists are at the end of documents, press CTRL+END to move to the bottom of the document.

2. Type the name of the person or entity and any special distribution information that is mentioned, such as address or fax number. Type an asterisk at the end of the line. **Note**: The asterisk alerts staff who handle document distribution that these copies are special requests.

3. When saving the document, adjust the number in the Copies prompt to reflect the total number of extra copies that were added using this procedure.
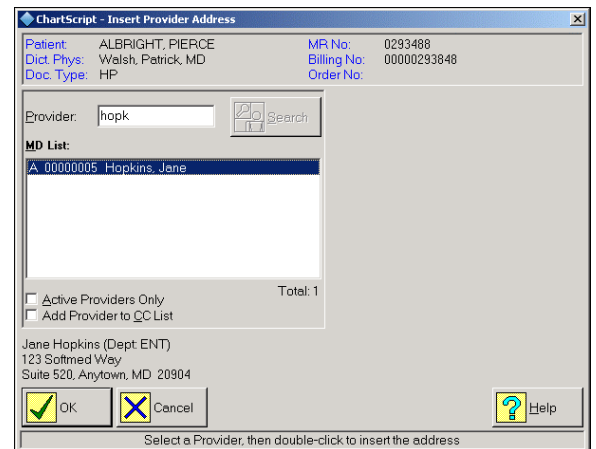
> Follow these instructions exactly to avoid deleting or rearranging any hidden bookmarks at the end of the document.

Inserting Addresses from ProviderID

Some document types, such as letters, may require an address for a person or facility. If the person or facility's name and address are entered in ProviderID, it is easy to retrieve this information into the document.

♦ **To insert a ProviderID address into a document**

1. From the **File** menu in Word, select **Insert Address** (CTRL+R).

2. On the Insert Provider Address window, in the **Provider** field, type a provider's number or all or part of the provider's last name. Select **Search** or press ENTER.

   Note: To ensure a faster and easier search, type specific search criteria. For example, typing only *New* may retrieve several providers with last names that begin with "New" in the Select One Provider window. However, typing *Newman, R* retrieves fewer providers, making selection faster and easier.

3. If you want to add this provider to the CC list as well, select the **Add Provider to CC List** check box.

4. Select a provider from the search results and select **OK**. The provider's name and address are merged into the document.

Viewing ESA Messages

Providers who are actively using the SoftMed Electronic Signature Authentication (ESA®) program to sign documents electronically can send a message to transcription. The message feature is intended to communicate instructions for making further modifications to an existing document before it is signed.

If a message is attached to a document, the message appears automatically when you open the document. However, if you close the message and need to view it again, you can open it manually.
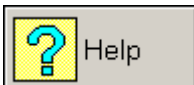
♦ **To manually view a message from ESA**

1. From the **File** menu in Word, select **View ESA Message** (CTRL+L).

2. On the ESA Message window, read the ESA message. If desired, type a response to the provider's comments or add a new message.

3. Select **OK** to return to the document.

The following functions are available on the ESA Message window.
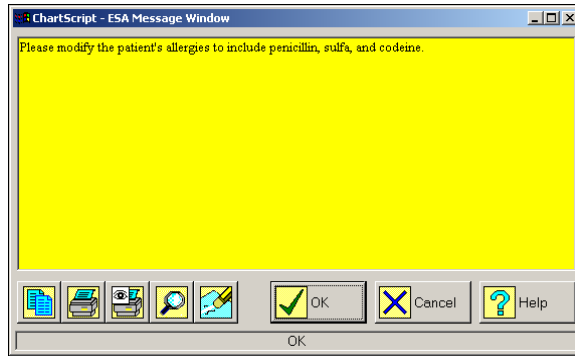
Button	Description
	Copies selected text to the Windows clipboard.
	Prints the message.
	Previews the printed appearance of the message.
	Searches for selected text in the message.
	Erases the message.

Button	Description
✔ OK	Closes the ESA Message window, accepting any changes to the message.
✖ Cancel	Closes the ESA Message window without saving changes to the message.
? Help	Displays ChartScript Help.
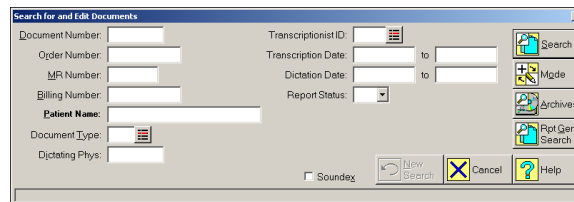
Searching ChartScript While Creating a Document

You can search for existing ChartScript documents and copy text into new documents. You can search for and open one existing document while working on a new document in Word.

♦ **To copy text from an existing document to a new one**
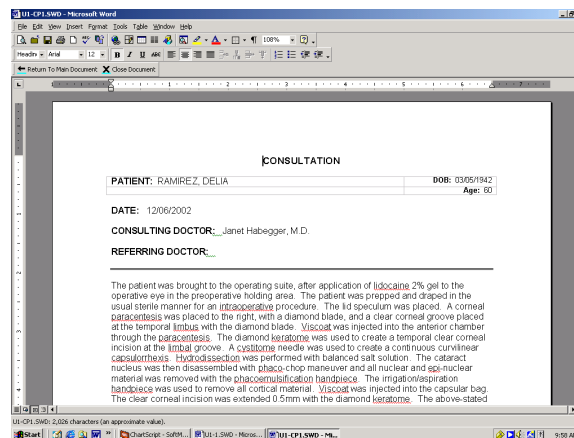
1. From the **File** menu in Word, select **Search ChartScript**.

2. On the Search for and Edit Documents window, enter the search criteria for the document that you want to copy from and select **Search**.

3. Select a document from the results that appear and select **Open Document**. The document appears in Word.

   Note: As mentioned earlier in this chapter, you can view a document without opening it in Word by selecting **View Document**. Use this function if you want only to review a document's text. The document cannot be edited, but you can copy the document's text to the clipboard. The document does not appear like it does when printed. For example, heading information may not appear and the signature line area may look different.

4. Select the text to copy and press CTRL+C to copy the text.

5. Do one of the following:
   - To close the second document window and return to the new document, select **Close Document**.
   - To return to the new document while keeping the second document window open, select **Return to Main Document**. To return to the second

document, you can press ALT+TAB or click the second document button on the Windows task bar.

6. In the new document, place the cursor where you want to paste the text and press CTRL+V.

Changing the Document Type (While Creating a Document)

Use the Change Document Type option if, after you have started a document, you realize that the document type is incorrect. You can copy any text that you have already typed to the new document.

> The Change Document Type option is available only in Add mode. You cannot change the document type of a saved document.

♦ **To change the Document Type by copying text**

1. Select any text in the body of the document that you want to keep. Do not include any sections created automatically by the document type format file, such as headers, footers, and merge fields.

2. From the **File** menu in Word, select **Document Type**.

3. On the Change Document Type dialog box, in the **Document Type** field, select a new document type and select **OK**.

4. On the Add a Document window, verify the demographic information and select **Document**. ChartScript creates a new document in Word.

5. Read the Change Document Type-Finished dialog box and select **OK**.

6. In the new document, place the cursor where you want to place the text from the first document and, from the **File** menu, select **Paste: Document Type Text**.

♦ **To change the Document Type without copying text**

1. From the **File** menu in Word, select **Document Type**.

2. On the dialog box that appears, select **Yes**.

3. On the Change Document Type dialog box, in the **Document Type** field, select a new document type and select **OK**.

4. On the Add a Document window, verify the demographic information and select **Document**. ChartScript creates a new document in Word.

If you attempt to paste text into the new document, the dialog box at left appears. Select **OK**.
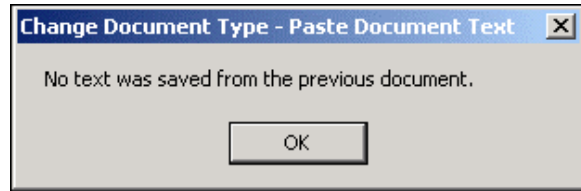
Changing the Document Status

If your document needs additional editing, you can save the document and assign one of three statuses:

❒ Incomplete
❒ Hold
❒ Permanent Hold

Incomplete Status

Incomplete status means that you need additional information from the physician to complete the transcription. If the physician is active in ESA, you can send the physician a message.

> This document will print in batch if you flag it for batch print. If your facility has Document Upload, documents marked Incomplete will upload to the mainframe system.

♦ **To mark a document Incomplete**

1. From the **File** menu in Word, select **Document Status** (CTRL+O).

2. On the Document Status window, select **Incomplete**.

3. Select **OK**.
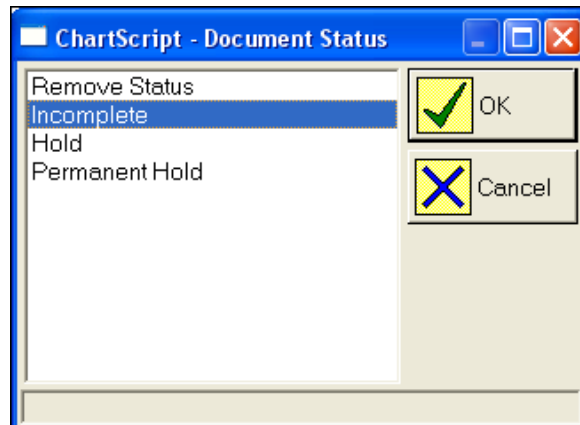
4. When you save the document, the window at left appears. Select **Yes** to send a message to the physician.

5. Type the message and then select **OK**.

Note: When you edit the document, ChartScript automatically removes the Incomplete status.
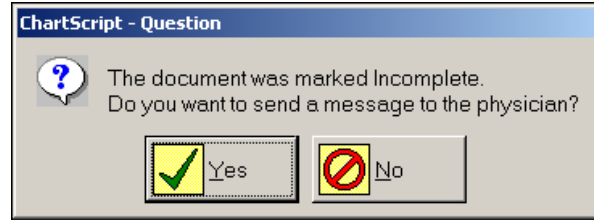
Hold Status

Hold status means that you need to keep the document out of distribution temporarily until you can complete it or verify information.

> The document will not be available in ESA or print in batch if you flag it for batch print. If your facility has Document Upload, documents marked on Hold will not upload to the mainframe system.

♦ **To mark a document on Hold**

1. From the **File** menu in Word, select **Document Status** (CTRL+O).
2. On the Document Status window, select **Hold**.
3. Select **OK**.

Note: When you edit the document, ChartScript automatically removes the Hold status, which makes the document available for distribution.

Permanent Hold Status

Permanent Hold status means that you need to keep the document out of distribution indefinitely. Use this status for documents that should never be in distribution or that go through a series of revisions before being approved for distribution. Documents that are on Permanent Hold are not available for batch printing, Document Upload, or ESA.

♦ **To mark a document on Permanent Hold**

1. From the **File** menu in Word, select **Document Status** (CTRL+O).
2. On the Document Status window, select **Permanent Hold**.
3. Select **OK**.

> Editing documents does not remove Permanent Hold status. To remove the Permanent Hold status, you must select **Remove Status** on the Document Status window.

Previewing Documents

Use Print Preview to see how the document will look when printed.

♦ **To preview the printed appearance of a document**

1. From the **File** menu in Word, select **Print Preview**. The Preview window appears.
2. Use the Preview toolbar at the top of the window to change your preview settings. See Word Help for details. Select **Close** to return to the document.

Checking Spelling and Grammar

ChartScript uses the Word spelling and grammar check features when creating or editing documents. In addition to the common words placed in the Word standard dictionary, your facility has loaded a medical spell checker to assist you in verifying medical terminology in the documents that you transcribe. See Chapter 1, "Microsoft Word Setup," for details on setting spelling and grammar options.

♦ **To check spelling and grammar**

1. From the **Tools** menu, select **Spelling and Grammar**.
2. On the Spelling and Grammar: English (U.S.) window, use the following functions to check the spelling and grammar of your document:

   - **Ignore**. Leaves the highlighted error unchanged and finds the next misspelling or grammar error. This button changes to Resume if you click in the document to edit the document. Select **Resume** to continue checking the spelling and grammar.
   - **Ignore All**. Leaves all instances of the highlighted error unchanged throughout the document and continues to check the document. Word ignores this spelling error or type of grammatical error throughout the rest of the current Word session.
   - **Add**. Adds the highlighted word in the Not in Dictionary box to the custom dictionary. See Chapter 1, "Microsoft Word Setup," for details on modifying your custom dictionary.
   - **Change**. Click **Change** to accept the current selection in the Suggestions box, or edit the text in the box and then select **Change**. When the selected error is a repeated word, this button changes to Delete, so you can easily remove the second instance of the word.
   - **Change All**. Changes all instances of the word in the Not in Dictionary or Capitalization box to the word in the Suggestions box, or edit the text in the box and then select **Change All**. Word changes all instances of the error in the active document only.
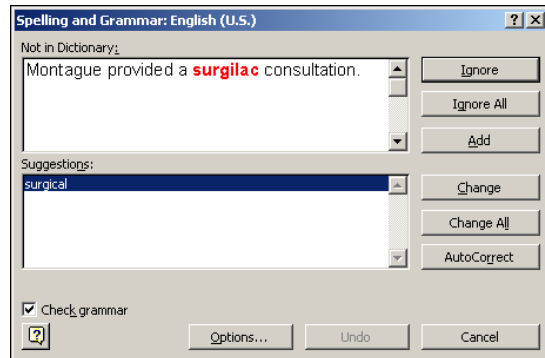
- **Options**. Displays the Spelling & Grammar Options dialog box, where you can open a different custom dictionary or change the rules that Word uses to check spelling and grammar.
- **Undo**. Reverses the most recent spelling and grammar check actions, one at a time.

3. When the entire document has been checked, the dialog box at right appears. Select **OK** to return to the document.
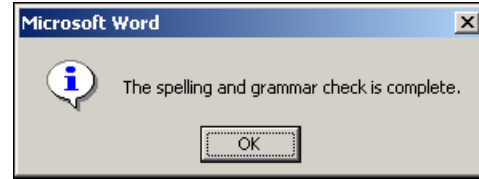
Completing Documents

After transcribing the document, you have two options when saving it:

❐ Flag the document for later batch printing.

❐ Print the document immediately.

Saving and Batch Printing Documents

♦ **To save a document**

1. On the ChartScript toolbar in Word, select **Save** (CTRL+S).

2. On the window that appears, change the default settings, if necessary, and select **OK**. The document type controls the default number of copies and whether the **Batch Print** check box is selected when the window appears. If the check box is selected, the document prints the next time someone runs the batch print function.
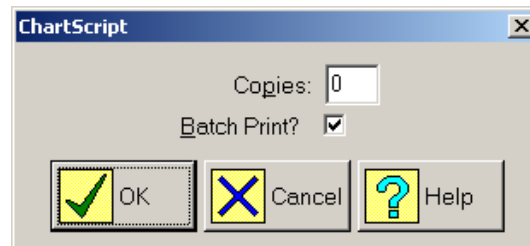
Note: At the copies prompt, add any special copies that you need to the default number that appears. Examples include unanticipated copies, such as for the patient or for a provider not in ProviderID. See the "Non-ProviderID Copy Requests" section earlier in this chapter for details.

Stat Printing Documents

♦ **To stat print a document**

1. From the ChartScript toolbar, select **Print** (CTRL+P).

2. On the Stat Document Printing window, select the print rule to use for printing the document.

   Note: Use the Long Description section of the window to acquire more information about each print rule.

3. If the print rule that you have selected includes the printing of carbon copies, you can choose to print an envelope along with the carbon copies. To include the printing of envelopes, select the **Include Envelopes?** check box and then select the envelope rule that you want to use from the drop-down list in the **Envelope Rule** field. Select **Print**.
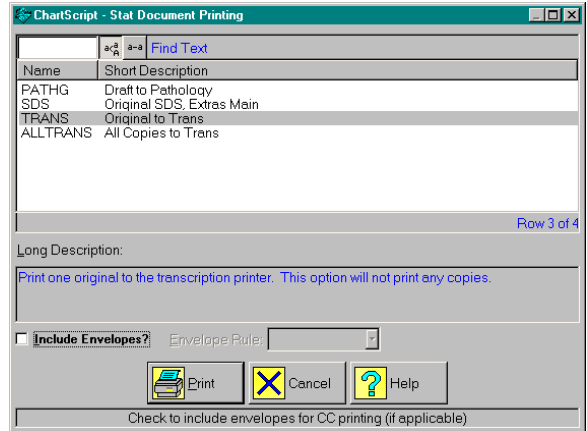
The following prompts may also appear as part of the stat printing process, depending upon how various parameters and features have been configured.

5. A dialog box like the one at right appears if your facility uses ChartPrint to process stat print jobs and if ChartPrint is currently not running.

   Do one of the following and then select **OK**:

   ▪ Select **Process via ChartPrint** if you want to send the stat print job to ChartPrint for processing. Because ChartPrint is currently not running, the stat print request will not be processed and printed until ChartPrint becomes available.

   Note: If your facility uses ChartPrint and it is not running, you should notify the ChartScript administrator.

   ▪ Select **Process Locally** if you want to bypass ChartPrint in this situation and print the stat print job directly on your workstation. This option requires that the printer you want to use to print the document be installed directly on your workstation. If it is not, you should send the document to ChartPrint for later processing.
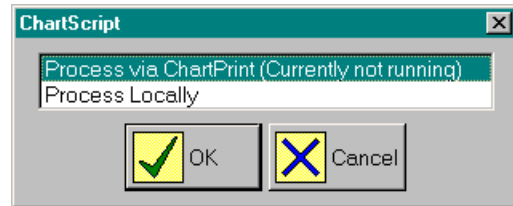
6. The dialog box at right may appear for originals or extra copies when using some print rules. If necessary, modify the number of originals or extra copies to be generated with this stat print job. Select **OK**.
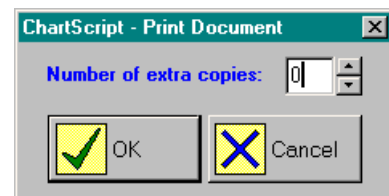
7. You may also see a dialog box that asks questions about batch printing.

- In the **Copies** field, type the number of extra copies that should print if the document is later batch printed.

- Select the **Batch Print Original/Copy?** check box if you want the original and any extra copies to be printed as part of a batch print. Keep in mind what you have stat printed and whether batch printing the original and/or extra copies is necessary so that you do not create duplicate originals or extra copies.

- Select the **Batch Print CCs?** check box if you want the carbon copies to be printed as part of a batch print job. Keep in mind what you have stat printed and whether batch printing the carbon copies is necessary so that you do not create duplicate copies.

    Note: If the document that you are stat printing does not contain any carbon copies, the dialog box appears as at right, because there does not need to be a division between the distribution of originals and extra copies and the distribution of carbon copies.
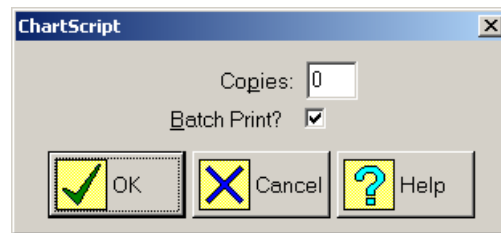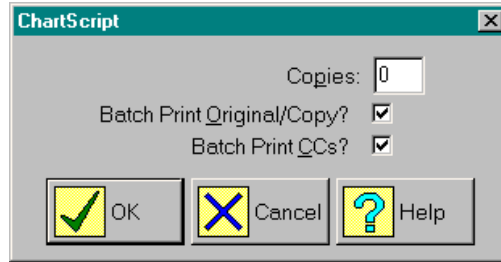
8. Select **OK**. The document is stat printed and saved at this time. The Search for and Add Documents or Search for and Edit Documents window appears.

Closing Documents Without Saving

Occasionally, you may enter a ChartScript Document and decide to "back out" of the document without saving it.

> You should never attempt to quit Word by using the X button in the upper left corner of the window. Using the X button may cause Word to become unstable or to close completely. Use the following procedure to close a Word document without saving.
>
> SoftMed cannot control certain Word functions. Always use the **File** menu to ensure that Word and ChartScript function together properly.

♦ **To close a document without saving**

1. From the **File** menu, select **Exit Document**.
2. On the Exit dialog box, select **No**. The document is closed and not saved.

Creating Addenda

In the event that a change needs to be made or more information needs to be added to an existing document in that has been electronically signed in ESA, an addendum to a document can be created, which will then be merged onto the end of the original (primary) document. The primary document will not be changed. The addendum will also remain its own document for ease of printing and editing if you are only editing or printing the addendum and not the primary document.

When creating an addendum to a document in Signed status, the dictator will identify the document as an addendum using DDSI, VoiceScript, and so on. Addenda can only be created by facilities that have ESA turned on and only when you are not transcribing a ChartScriptMD document.

Creating an addendum is much like creating a new document. Addenda may only be created for signed ChartScript documents. Addenda utilize addenda format files that work in the same way as format files do for documents. See the *ChartScript Management Guide* for more information about addenda format files. After an addendum is transcribed, it must be sent back to the authenticating provider for signature.

♦ **To create an Addendum**

1. From the ChartScript toolbar, select **Add**.

2. Search for the signed ChartScript document to which you would like to add the addendum. See Chapter 3, "Searching for Patient Records" for more information on how to search for documents.

3. On the ChartScript Documents Found window, select **Addendum**.

   Note: If any unsigned addenda already exist for the selected signed document, a warning message is displayed, including the document number(s) of the addenda. A warning message stating that an addendum can only be created for a signed document also appears if you have chosen an unsigned document.
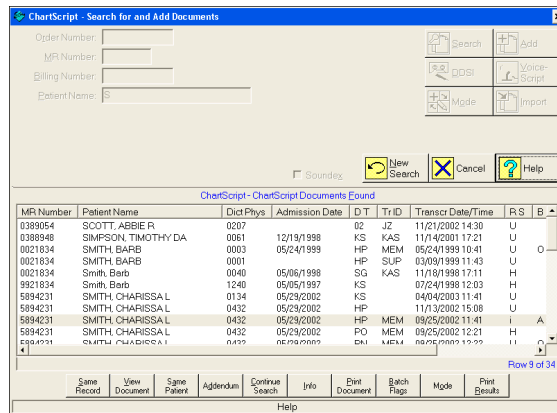
The Add a Document Addendum window appears. A number of fields will already be copied from the primary document; these fields will be read-only and will have a yellow background.
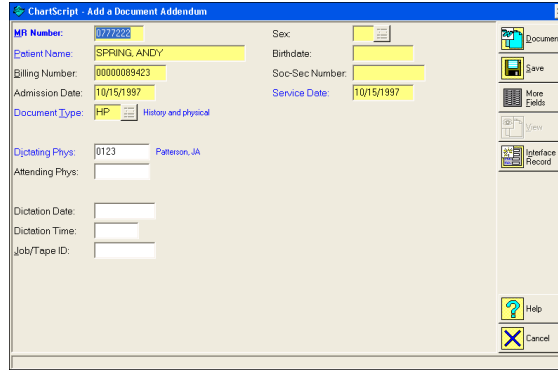
Note: The following fields are always read-only in the Add a Document Addendum window: **Document Type**, **MR Number**, **Patient Name**, **Billing Number**, **Admission Date**, **Discharge Date**, **Surgery Date**, **Sex**, **Birthdate**, **Soc-Sec number**, **Service Date**, **EPI Number**, **Facility**, **Order Number**, (and multiple order numbers).

See the "Setting ChartScript Parameters" chapter of the *ESA Management Guide* for instructions on how to choose and/or change which fields are read-only in this window.

4. Select **Document** to begin typing the addendum. Once in Word, you will be presented with the addendum format file. See the "Document Types" chapter of the *ChartScript Management Guide* for more information on creating addenda format files.

   Note: The primary document may be accessed in the second document window for any copying or pasting that you would like to do.

Productivity Features

ChartScript Keyboard

ChartScript uses standard Word keyboard shortcuts and provides additional shortcuts to simplify document editing.

Using SoftMed Shortcut Keys

The following shortcut keys are either added by SoftMed or modified from the Word standard action.

To	Press
Change document status	CTRL+O
Display the demographics screen	CTRL+D
Edit abbreviations	CTRL+A
Edit the CC list	CTRL+E
Expand text insert	ACCENT KEY (`)
Go to the next jump code	CTRL+J
Insert a provider's address	CTRL+R
Insert standard text	CTRL+N
Open the ESA message window	CTRL+L
Save document, close Word, and return to ChartScript	CTRL+S
Save and stat print the document	CTRL+P
Disable abbreviation expander	CTRL+W

Using Common Keyboard Commands

Command	Press
Activate Menu	F10, then arrow keys or ALT+underlined letter.
Change case	SHIFT+F3
Copy selected text	CTRL+C or SHIFT+F2
Display nonprinting characters	CTRL+SHIFT+* (asterisk)
Exit	ALT+F4
Extend selection	F8
Find text	CTRL+F
Go To	CTRL+G or F5
Hanging indent	CTRL+T
Left indent	CTRL+M
Move text	F2
ChartScript Help	F1
Paste text	CTRL+V
Repeat last find	SHIFT+F4
Repeat the last action	CTRL+Y or F4
Search and Replace	CTRL+H
Show all tabs and hard returns	CTRL+SHIFT+8
Spell check	F7
Thesaurus	SHIFT+F7
Undo the last action	CTRL+Z or ALT+BACKSPACE

Deleting Text and Graphics

To	Press
Delete one character to the left	BACKSPACE
Delete one word to the left	CTRL+BACKSPACE
Delete one character to the right	DELETE
Delete one word to the right	CTRL+DELETE
Cut selected text to the Clipboard	CTRL+X
Undo the last action	CTRL+Z

Copying and Moving Text and Graphics

To	Press
Copy text or graphics	CTRL+C
Move text or graphics	F2 (then move the insertion point and press ENTER), CTRL+X
Paste the Clipboard contents	CTRL+V

Selecting Text and Graphics

Select text by holding the SHIFT key and pressing the key that moves the insertion point.

To extend a selection	Press
One character to the right	SHIFT+RIGHT ARROW
One character to the left	SHIFT+LEFT ARROW
To the end of a word	CTRL+SHIFT+RIGHT ARROW
To the beginning of a word	CTRL+SHIFT+LEFT ARROW
To the end of a line	SHIFT+END
To the beginning of a line	SHIFT+HOME
One line down	SHIFT+DOWN ARROW
One line up	SHIFT+UP ARROW
To the end of a paragraph	CTRL+SHIFT+DOWN ARROW
To the beginning of a paragraph	CTRL+SHIFT+UP ARROW
One window worth of text down	SHIFT+PAGE DOWN
One window worth of text up	SHIFT+PAGE UP
To the beginning of a document	CTRL+SHIFT+HOME

Formatting Characters

To	Press
Apply or remove bold formatting	CTRL+B
Apply or remove an underline	CTRL+U
Apply or remove italic formatting	CTRL+I
Format letters as small capitals	CTRL+SHIFT+K
Apply subscripts (automatic spacing)	CTRL+EQUAL SIGN

To	Press
Change the font	CTRL+SHIFT+F
Change the font size	CTRL+SHIFT+P
Increase the font size by 1 point	CTRL+]
Decrease the font size by 1 point	CTRL+[
Increase the font size	CTRL+SHIFT+>
Decrease the font size	CTRL+SHIFT+<
Underline single words	CTRL+SHIFT+W
Double-underline text	CTRL+SHIFT+D
Change the case of letters	SHIFT+F3
Format letters as all capitals	CTRL+SHIFT+A
Apply superscripts (automatic spacing)	CTRL+SHIFT+EQUAL SIGN
Remove formatting (plain text)	CTRL+SHIFT+Z

Using Jump Codes

Jump codes are placed within documents as placeholders. If jump codes are placed in a document, you may "jump" to the next set of jump codes by typing CTRL+J on your keyboard. Jump codes are indicated by two question marks (??).

Adding Standard Text

ChartScript has two built-in expander functions that were designed to assist you in quickly adding standard text to a document. This section describes the basic features of text inserts and abbreviations. To learn more about the advanced features of ChartScript expanders, see the "Expander Functions" chapter of the *ChartScript Management Guide*.

Text inserts and abbreviations may be shared by all transcriptionists, or they may be created and used by each individual transcriptionist. Shared expanders can be used by all transcriptionists but not modified. Personal expanders can be used and modified by only the transcriptionist who created them.

Using Text Inserts

Use text inserts to add predefined standard text to a document.

♦ **To use a Text Insert**

1. From the **File** menu in Word, select **Text Inserts** (CTRL+N).

2. On the Text Inserts window, in the **Find Text** field, type a name for the text insert. The preview box shows you the text for the name that you entered.

3. Select **Insert** to place the text in the document.
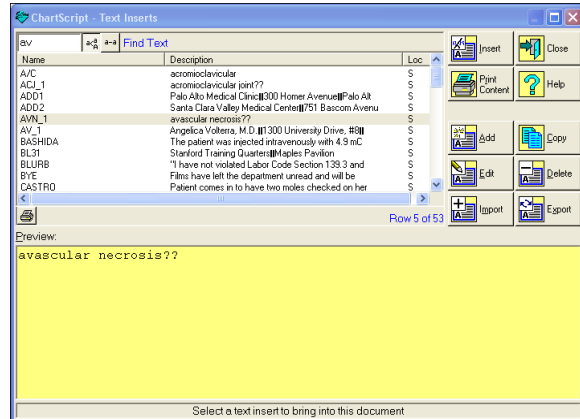
4. If the text insert has inputs for you to fill out, a window will pop up where you enter the answers for the inputs.
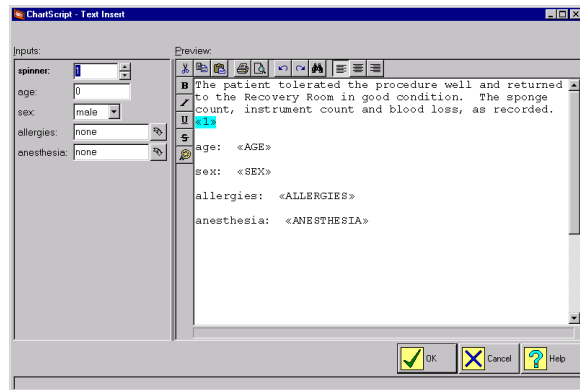
5. Select **F5** to preview what the inputs will look like in the document.
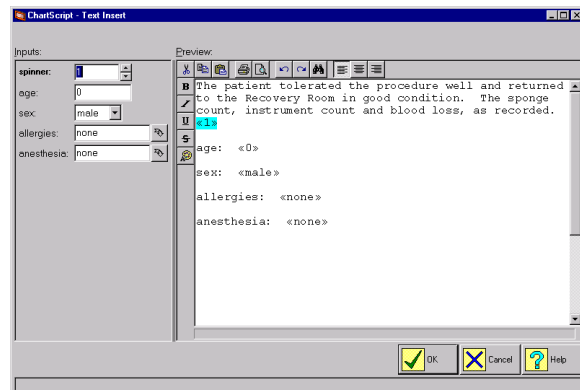
Text Insert Quick Expansion

Use the Expand Insert feature to add text to a document quickly without using the Text Inserts window.

♦ **To expand a text insert**

1. In the Word document, type the name for the text that you want to insert.

2. Press the accent key (`) to expand the text in the document.

Creating Text Inserts

You can define a new text insert for personal use. Text inserts are recommended for text in the form of a sentence or longer or text that contains a paragraph return or tab.

♦ **To create a new text insert**

1. Type the standard text into the document, placing jump codes (??) in the appropriate locations.

2. Select the text that you want to include in the text insert. From the **File** menu in Word, select **Text Inserts** (CTRL+N).

3. On the Text Inserts window, select **Add**.
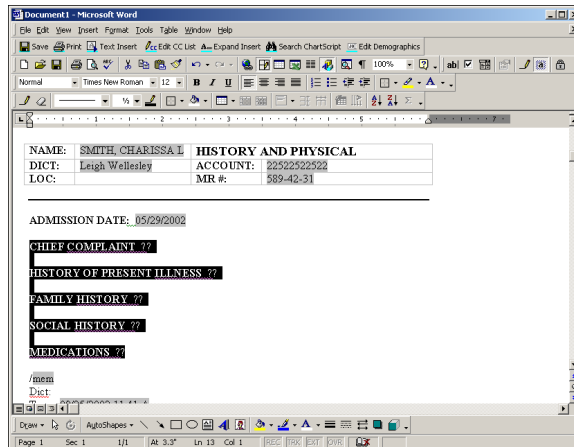
4. Select **Yes** on the dialog box that appears.

5. On the Define Text Insert window, do the following:

   ▪ In the **Name** field, type an abbreviation for the text insert.

   ▪ In the **Description** field, describe the contents of the text insert.

   ▪ In the **Format Mode** field, select one of the following format types:

     • **Document's**. The text insert uses the document's format settings when it is inserted. Attributes set in the insert, such as bold and italic, are kept, but numbered or bulleted lists are lost.

     • **Insert's** (except font name/size). The text insert uses the document's font and size settings, but retains other settings in the insert's definition, such as bulleted or numbered lists.

     • **Insert's**. The text insert always retains the settings and attributes you select in the definition.
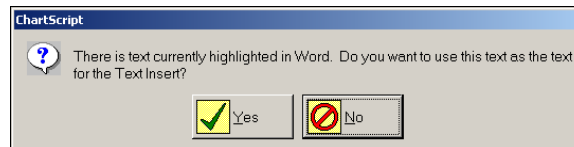
6. The text that you selected in the document appears in the **Text Insert** Definition box. If necessary, select **Edit Text** to make changes to the content of the text insert.

7. Select **Save**. Your new text insert appears in the list on the Text Inserts window.

8. Select **Close** to return to the document.
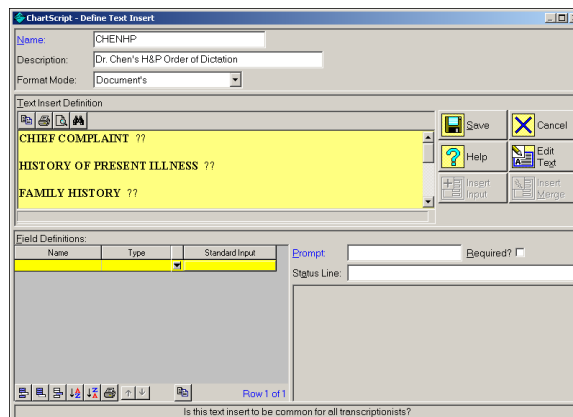
Using Abbreviations

Abbreviations are recommended for short terms that have no paragraph returns or tabs.

♦ **To use abbreviations**

1. Type the abbreviation.
2. Press one of the following keys:
   - period
   - comma
   - TAB
   - SPACEBAR

Note: To see a list of abbreviations, from the **File** menu in Word, select **Edit Abbreviations** (CTRL+A).

Abbreviation Case Sensitivity Rules

SoftMed recommends typing the long form of most abbreviations in lowercase, so that transcriptionists can take advantage of the case sensitivity features that are built into the expander. The case of the expanded form of the abbreviation is determined by how the short form is typed. The table below shows how the abbreviation expander handles case sensitivity.

Short Form	Expands as	Case sensitivity
cc	chief complaint	lowercase
Cc	Chief complaint	sentence case
CC	CHIEF COMPLAINT	uppercase

Creating Abbreviations

You can add an abbreviation for personal use.

♦ **To add an abbreviation**

1. From the **File** menu in Word, select **Edit Abbreviations**.

2. On the Abbreviations window, select **Add**.
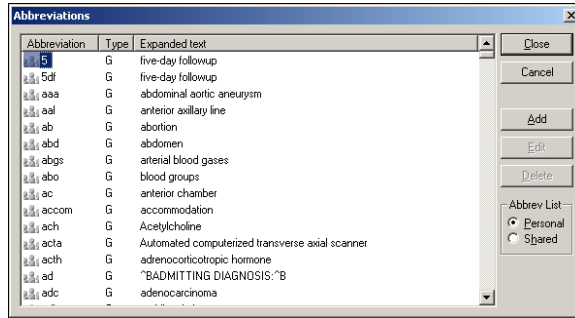
3. On the Abbreviation Entry window, in the **Short Form** field, type the abbreviation code. Press TAB.
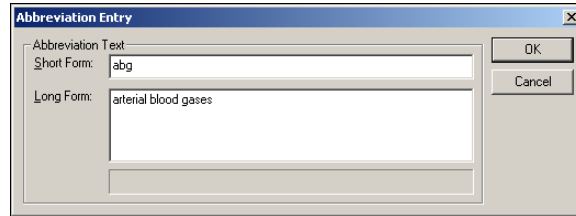
Note: The short form must be less than 32 characters and can contain the letters a-z, the numbers 0-9, and the dash (-) and slash (/) characters. The use of other keyboard symbols or punctuation marks is not permitted. You cannot type uppercase letters in the short form.

4. In the **Long Form** field, type the full text that you want the abbreviation to become when it is expanded. Select **OK**.

5. On the Abbreviations window, select **Save**.

Adding Special Formatting to Abbreviations

You can apply some formatting to the long form of your abbreviations. The formatting options follow the CTRL+key sequences in Word. For example, CTRL+B turns on bold in Word. In your long form text, use the caret (^) to designate the beginning and end of formatting. For example, ^bpatient^b results in **patient**.

Keystroke combinations that use the backslash (\) result in special placement of the long form text or the cursor by inserting a backspace, tab, or hard return.

The following table lists the special formatting that can be added to your abbreviations in the Long Form section:

Special Formatting	Keystroke Combination
Bold	^B
Underline	^U
Italics	^I
Subscript	^=

Special Formatting	Keystroke Combination
Superscript	^+
Hard Hyphen	^_ (underscore)
Backspace	\b
Tab	\t
Enter	\r

The keystroke combination for bold, underline, italics, subscript, and superscript should be placed at the beginning of the Long Form to turn on the text attribute and again at the end of the Long Form to turn the attribute off. The following example shows how bold can be added to a standard heading.
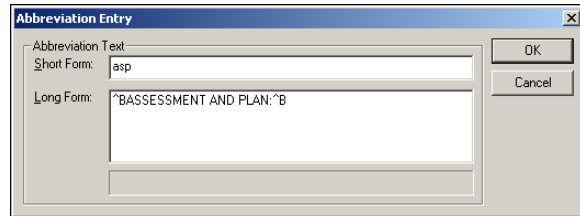
The keystroke combination for backspace should be placed at the beginning of the long form so that the space between the expanded text and the word that was typed previously is eliminated.
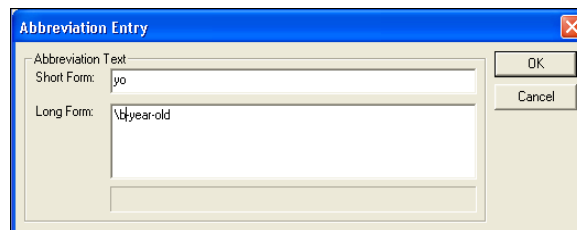
The keystroke combination for tab or enter should be placed at the end of the long form so that the cursor is placed at either the next tab stop or on the next line when the abbreviation expander is expanded.
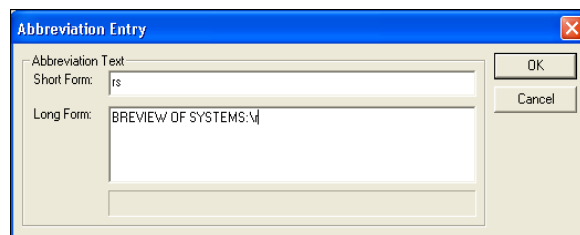
♦ **To edit an abbreviation**

1. From the **File** menu in Word, select **Edit Abbreviations** (CTRL+A).
2. On the Abbreviations window, select the abbreviation that you want to edit and select **Edit**.
3. On the Abbreviation Entry window, make the necessary modifications to the abbreviation. Select **OK**.
4. On the Abbreviations window, select **Save**.

♦ **To delete an abbreviation**

1. From the **File** menu in Word, select **Edit Abbreviations** (CTRL+A).
2. On the Abbreviations window, select the abbreviation that you want to delete and select **Delete**.
3. On the Delete Abbreviation Entry dialog box, select **Yes**.
4. On the Abbreviations window, select **Save**.

Disabling the Abbreviation Expander

If you choose not to use the abbreviation expander, you can disable it for your current ChartScript session.

♦ **To disable the abbreviation expander manually during a ChartScript session**

1. While transcribing a document, press CTRL+W.

2. Continue typing. The abbreviation expander will not function until CTRL+W is pressed again or you exit and restart ChartScript.

Occasionally, you may come across an individual abbreviation that you want to type but not expand. In this instance, you may disable the expander for one abbreviation.

♦ **To disable the abbreviation expander temporarily for one abbreviation**

1. Type the abbreviation into the text of the document.

2. Press CTRL or END.

3. Press SPACEBAR. The abbreviation will not expand.

4. Continue typing. The abbreviation expander will continue to function until the above steps are followed again.

CHAPTER 6

Working With Existing Documents

Searching for Existing Documents

You can edit previously created ChartScript documents, including those with a report status of Incomplete or Hold. You search for an existing document in the same way that you search when adding a document; however, you can narrow the search by typing values in multiple data fields. ChartScript locates documents in the active ChartScript database that match all of the search criteria that you indicate.

Notes:

❐ Search by multiple demographic fields to narrow the search results.

❐ Select **Mode** (F9) on the Search for and Add Documents window to switch between Add mode and Edit mode.

♦ **To search for an existing document**

1. On the ChartScript main window, from the toolbar, select **Edit**.

2. On the Search for and Edit Documents window, type the demographic data for the search and select **Search** (F4).

3. The ChartScript Documents Found pane appears, listing existing documents that contain demographic information that matches your search criteria.
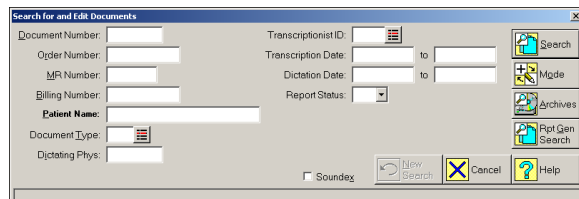
Notes:

❐ Your ChartScript administrator determines which demographic fields appear on the ChartScript Documents Found pane.

❐ To sort the list by a different field, click the column heading of the desired field.

Documents With SQL Orders

When searching for existing documents, the ChartScript Documents Found window displays the word MULTIPLE in the **Order Field** for documents that are associated with more than one order number.

The word MULTIPLE also appears when you select **Info** to view the Fields, CCs, and Orders window.

To see the order numbers associated with the document, select **Display Orders.**

Search via Report Generator

The Report Generator can produce search results for the Search for and Edit Documents window. This feature enables you to search for documents by any field, rather than only those listed on the Search for and Add Documents window.

♦ **To search using the Report Generator**

1. From the ChartScript toolbar, select **Edit**.

2. On the Search for and Edit Documents window, select **Rpt Gen Search**.

3. On the Search via Report Generator window, enter your search criteria and select **Search**.

The search results appear in the ChartScript Documents Found pane of the Search for and Edit Documents window.
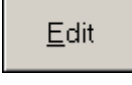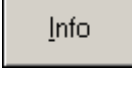
Below are a few guidelines for using Search via Report Generator:
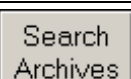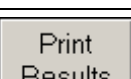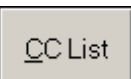
❐ When you select **Rpt Gen Search**, any criteria entered on the Search for and Edit Documents window appears on the Search via Report Generator window. There is no limit to the number of criteria fields that you can enter on the Search via Report Generator window.

❐ After a successful search, the criteria entered on the Search via Report Generator window remain until you change the criteria on the Search for and Edit Documents window or close the Search for and Edit Documents window.

❐ The Search via Report Generator window enables you to sort search criteria, but you cannot group the search results.

❐ If you sort by any fields on the Search via Report Generator window, the search results are sorted by those fields in the ChartScript Documents Found pane of the Search for and Edit Documents window. If you do not sort by any fields on the Search via Report Generator window, the search results are sorted by patient name.
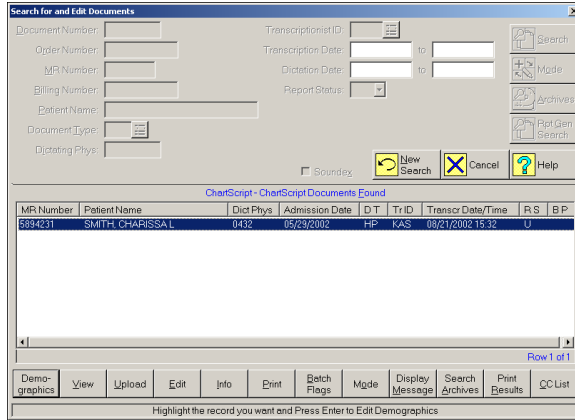
Working With Existing Documents

Following is a description of the toolbar buttons on the ChartScript Documents Found window. The following sections describe how a transcriptionist uses the functions available from the toolbar.

Button	Description
Demo-graphics	Opens a window that enables you to edit the selected document's demographic information. This button is the default button on the ChartScript Documents Found window.
View (F2)	Displays the contents of the selected document. You cannot edit the document, but you can copy the document's text to the Clipboard.
Upload (F3)	Adds the selected document to the upload queue. This button appears if your facility uses Document Upload.
Edit (F5)	Displays the selected document in Word, which enables you to edit the document.
Info (F6)	Displays the Fields, CCs, and Orders window, which displays the selected document's demographic information and printing details.
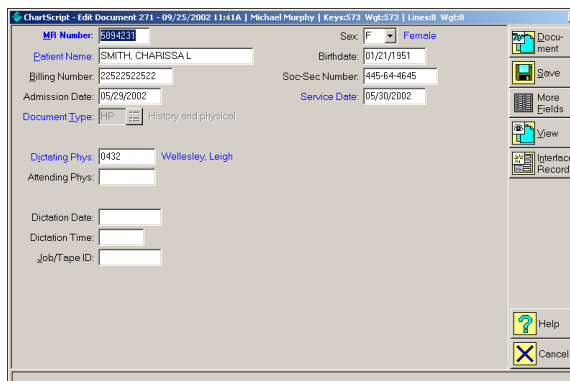
Button	Description
Print (F7)	Reprints the selected document. You select to print the originals and extra copies or carbon copies.
Batch Flags (F8)	Enables you to view and set the original and extra copies or carbon copies batch flags of the selected document.
Mode (F9)	Enables you to switch to Add mode.
Display Message (F10)	Opens the ESA Message window, which displays messages attached to the selected document. This button appears if your facility uses ESA.
Search Archives (F12)	Enables you to search for archived documents with demographic information that matches your search criteria. This button appears if your facility uses RAAS.
Print Results	Opens the Printer Setup dialog box, which enables you to print the list of documents on the ChartScript Documents Found window.
CC List	Opens the CC List for Document window, which enables you to add providers to and remove providers from the CC List of the selected document and set batch flags for specific providers.

Changing Document Demographics

You can edit an existing document's demographic information. To change the document type, see the "Changing the Document Type" section on page 6-6.

♦ **To change a document's demographic information**

1. On the ChartScript Documents Found window, select a document from the list. Select **Demographics**.

2. On the Edit Document window, change the appropriate demographic information. If the demographic field that you want to change does not appear on this window, select **More Fields** to display the remaining demographic fields.

   Notes:

   ▪ Select **View** to see the contents of the document without opening it in Microsoft Word.

- If the document status is R or S, the **Dictating Phys**, **Dictation Date**, **Dictation Time**, and **Job/Tape ID** fields are not editable.
- If your facility has SQL Orders enabled, the Order Number field is replaced by a SQL Order Numbers field when selecting **More Fields**.

3. Select **Interface Record** to search for an interface record and use the information therein to replace or populate the demographic information. This feature is particularly useful for locating visit-specific information that may have been missed or erroneously selected during the initial search. **Note**: If your facility has SQL Orders enabled, the **Order Number** field is replaced by a SQL **Order Numbers** field when selecting **Interface Record**.

4. On the Select an Interface Record window, type the search criteria and select **Search**.

5. On the Select the fields you want to use window, select a record. Select **OK** to accept the demographic data from the interface record for the field adjacent to the check mark, and return to the previous window.

- Select [icon] to select all demographics fields. A red check mark appears next to all of the fields.

- Select [icon] to cancel the selection of all demographics fields. All red check marks are removed.

Note: Click on a field once to cancel the selection, and again to reselect it.

6. Do one of the following:

- Select Document. ChartScript starts Word and displays the document. Verify that the demographic information that you changed has changed within the document.

- Select Save to save changes to the demographic information without entering the document.

7. If you selected **Document** in Step 5, from the ChartScript toolbar in Word, select **Save** to save your changes and close the window.

Changing the Document Type (After Saving a Document)

If you save a document with an incorrect document type, you can open the document and copy and paste the text to a new document with the correct type. In essence, you are creating a new document with a new number.

♦ **To change the type of a saved document**

1. On the ChartScript toolbar, select **Add**.

2. Follow the normal steps to add a document. See the "Using the ChartScript Search Feature," "Completing Demographic Information," and "Starting Documents" sections in Chapter 4 for more information. On the Document Type to Use for the Document window, type the correct document type.

3. After ChartScript starts Word, from the **File** menu, select **Search ChartScript**.

4. On the Search for and Edit Documents window, type the search criteria for the incorrect document and then select **Search**.

5. On the ChartScript Documents Found window, select the document that contains the wrong document type and then select **Open Document**.

6. Select the text to copy and press CTRL+C.

   Note: Do not select the signature line or CC sections of the document.

7. Select **Close Document** to close the second document window and return to the new document.

8. In the new document, place the cursor where you want to paste the text and press CTRL+V.

9. If you need to add providers who should receive carbon copies, from the ChartScript toolbar, select **Edit CC List**. On the CC List for Document window, add the providers and then select **OK**.

   Note: The carbon copy list from the incorrect document does not copy over to the new document. You must verify that the names are present on the new document.

10. From the ChartScript toolbar, select **Save**.

After you create the new document with the correct document type, you should purge the document with the incorrect document type.

♦ **To purge a document**

1. On the ChartScript main window, from the **Documents** menu, select **Purge Documents**.

2. On the Search for and Purge Documents window, type your search criteria and then select **Search**.

3. On the ChartScript Documents Found window, select the document with the incorrect document type and then select **Purge**.

4. On the dialog box that appears, select **Yes**.
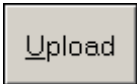
> Before purging the document, ensure that the new document is in the database.

Viewing Documents

You can view a document without opening it in Word. Use this function if you want to review only a document's text. For more information, see the section "Viewing Documents" in Chapter 6.

Adding Documents to the Upload Queue

You can add a document manually to the upload queue. The Document Upload interface moves documents from the queue to the mainframe.

♦ **To add a document to the upload queue**

1. On the ChartScript Documents Found window, select a document from the list. Select **Upload** (F3).

2. On the Question dialog box, select **Yes**.
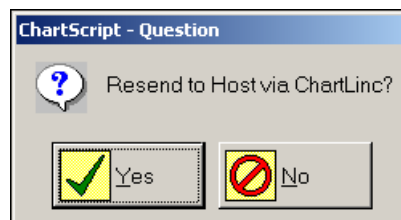
Editing Documents

♦ **To edit a document**

1. On the ChartScript Documents Found window, select a document from the list. Select **Edit** (F5). ChartScript starts Word and displays the document. Change the document's text. **Note**: If there is a message from the provider, it appears automatically when you open the document.

2. From the ChartScript toolbar in Word, select **Save** to save your changes and close the window.

Notes

❒ To change any demographic information, see the section "Changing Document Demographics."

❐ You cannot change the document type of an existing document by simply editing the document. For instructions on changing the document type, see the "Changing the Document Type (After Saving a Document)" section on page 6-6.

Displaying Document Information

Info

You can display a document's demographics and print information. For more information, see the section "Displaying Document Information" in Chapter 6.

Reprinting Documents

Print

You can reprint a document after it has been created, saved, or printed. For more information, see the section "Reprinting Documents" in Chapter 6, "Working with Existing Documents."

Setting Document Batch Flags

Batch Flags

You can set the print batch flags for a document's original and extra copies or for a document's carbon copies. For more information, see the section "Setting Document Batch Flags" in Chapter 6.

Switching to Add Mode

Mode

Select this button to switch to Add mode.
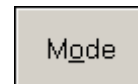
Displaying Messages

Display Message

You can view any messages attached to the document, including messages attached by a transcriptionist via ChartScript, and messages attached by a provider via ESA.

♦ **To display messages attached to the document**

1. On the ChartScript Documents Found window, select a document from the list. Select **Display Message** (F10). The ESA Message Window appears with the messages attached to the document.

2. Do one of the following:

   ▪ Click [icon] to copy the contents of the window to the Clipboard, or to copy the selected text to the Clipboard.
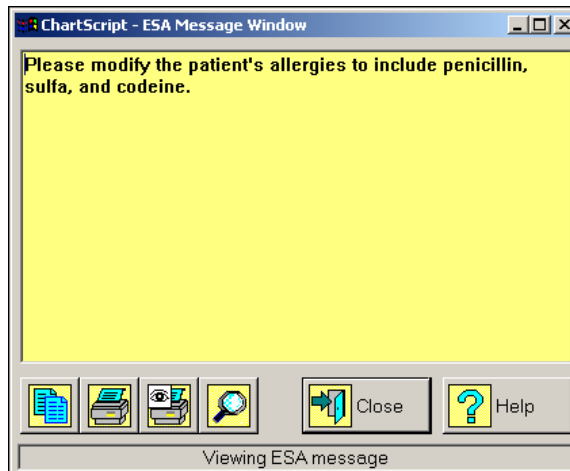
- ▪ Click [icon] to print the contents of the ESA Message window or to print the selected text in the window.

- ▪ Click [icon] to preview the contents of the ESA Message window, or the selected text in the window, before printing.

- ▪ Click [icon] to perform a case-sensitive search for text.

3. Select **Close** to close the window.

Searching the Document Archives

[icon: Search Archives]
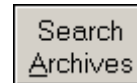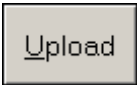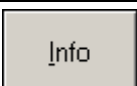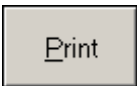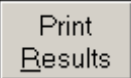
If the document that you want does not appear in the ChartScript Documents Found window, you can search the document archives, if your facility uses a version of the SoftMed Rapid Access Archive System (RAAS®).

♦ **To search the document archives**

1. On the ChartScript Documents Found window, select **Search Archives** (F12). ChartScript uses the data from the Search for and Edit Documents window to locate archived documents that match the search criteria. If archived documents are found, the Search for Documents in the Archives window appears.

2. Select a document from the list.

The following functions can be executed on an archived document.

Button	Description
View	Displays the contents of the selected document. See the "Viewing Documents" section of Chapter 6 for details.
Upload	Adds the selected document to the upload queue so that it can be sent to an online data repository. See the "Adding Documents to the Upload Queue" section on page 6-7 for details.
Info	Displays the selected document's demographic information and printing details. See the "Displaying Document Information" section of Chapter 6 for details.
Print	Reprints the selected document. See the "Reprinting Documents" section of Chapter 6 for details.

Button	Description
Print Results	Prints the list of archived ChartScript documents found that match your search criteria.
Restore	Moves a document back into the active ChartScript database. Select **Restore** only if you want to edit the document. If you make changes to the document after restoring it, the document will be archived again the next time maintenance is run.

Printing the List of ChartScript Documents Found
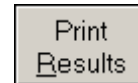
You can print the list of ChartScript documents found that match your search criteria. For more information, see the section, "Printing the List of ChartScript Documents Found" in Chapter 6.

Editing the CC List
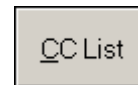
You can add providers to and remove providers from the document's CC list without editing the document. You can also request a carbon copy of the document in the next batch print for specific providers.

Using this feature, the CC list will be updated on the document if the document has not been electronically signed. If the document has been signed using ESA, the CC list can be edited, but the changes will not be reflected on the document. You must select the **Info** button to view changes to the CC list that occurred after signature.

♦ **To edit the CC list**

1. On the ChartScript Documents Found window, select a document from the list. Select **CC List**. The CC List for Document window appears. The BP-CC List area of the window represents two options. Providers listed here receive carbon copies of the document, and a check mark next to a provider's name indicates that the provider will receive a copy during the next batch print.

2. To add a provider to the CC list, in the **Physician** field, type a provider number or a portion of the provider name. Select **Search**. Select a provider in the MD List, then select [>>] or press ENTER to move the provider to the BP-CC List.

3. To remove a provider from the CC list, select a provider in the BP-CC List, then select **Delete**.

4. To print a carbon copy for a provider in the next batch print, click the provider's name. A check mark appears next to the provider's name.

5. To disable a carbon copy from printing for a specific provider, click the provider's name and the check mark disappears. Select **OK** to save your changes and close the window.

CHAPTER 7 | # Troubleshooting
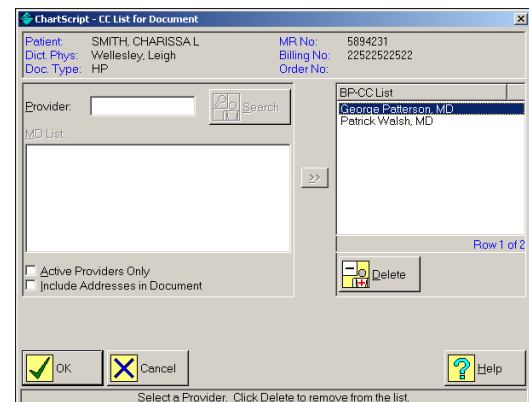
Retrieving Interrupted Documents

If Word unexpectedly shuts down while you are transcribing a document, you can retrieve a backup copy. Word automatically saves a copy of your document at regular intervals to ensure that it is available for automatic retrieval in the case of a power failure or similar problem.

To use this feature, a time interval must be set on your workstation. For instructions on setting this interval, see the "Enabling AutoRecover" section on page 1-1.

♦ **To retrieve an interrupted document**

1. If you receive an error message, print or write down the details and what you were doing when it appeared.

2. Shut down the computer and then restart it.

3. Start Word outside of ChartScript. The recovered document opens automatically with the word "Recovered" in the top left corner of the title bar.

    Note: You should have an icon for Microsoft Word on your desktop. Otherwise, from the **Start** menu, select **Programs** ▸ **Microsoft Word**. If you need assistance, please contact your Information Services representative.

4. Highlight the body of the recovered document and select **Copy** (CTRL+C).

    Note: Do not copy headers, footers, signature lines, and CC lists; copy only the body of the document.

5. From the **File** menu, select **Exit Document** to close Microsoft Word. You do not need to save the document; however, you may choose to do so as an additional safety measure.

6. Start ChartScript.

7. On the ChartScript main window, select **Add**.

8. Proceed as if you were creating a new document.

9. On the Add a Document window, recreate the demographics window for the document. Select **Document**.

    Note: The demographics window of an interrupted document is not recoverable and must be recreated manually.

10. In Word inside ChartScript, place your cursor in the proper location and select **Paste** (CTRL+V) to paste the text into the document.

    Note: The CC list of an interrupted document is not recoverable and must be recreated manually by using the Edit CC List function.

11. Proceed with completing and saving your document.

Retrieving Lastsave.rtf

If Word unexpectedly shuts down while you are saving a document using either the save (CTRL+S) or stat print (CTRL+P) method, and the above procedure for retrieving an interrupted document is unsuccessful, you still can retrieve a backup copy of the document through ChartScript. ChartScript saves a copy of your document to a file on your workstation named Lastsave.rtf.

Note: ChartScript saves only one Lastsave.rtf file on the workstation. If you do not retrieve the document right away, it will be overwritten the next time Lastsave.rtf is created.

♦ **To retrieve Lastsave.rtf**

1. When Word shuts down, click **OK** on the message box that appears. Be sure to write down the path to the document so you can browse to it easily.

2. If you receive an error message, print or write down the details and what you were doing when it appeared.

3. Start Word outside of ChartScript.

4. From the **File** menu, select **Open**.

5. On the Open window, browse to the path given on the message box. Select the document and select **OK**.

6. Highlight the body of the recovered document and select **Copy** (CTRL+C).

   Note: Do not copy headers, footers, signature lines, and CC lists; copy only the body of the document.

7. From the File menu, select **Exit Document** to close Microsoft Word. You do not need to save the document; however, you may choose to do so as an additional safety measure.

8. Start ChartScript.

9. On the ChartScript main window, select **Add**.

10. Proceed as if you were creating a new document.

11. On the Add a Document window, recreate the demographics window for the document. Select **Document**.

   Note: As is the case with an interrupted document, the demographics window is not recoverable and must be recreated manually.
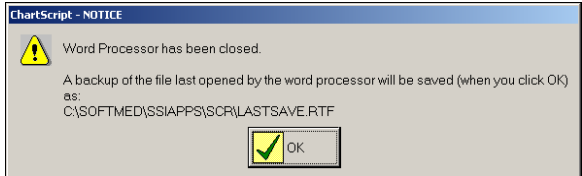
12. In Word inside of ChartScript, place your cursor in the proper location and select **Paste** (CTRL+V) to paste the text into the document.

   Note: As is the case with an interrupted document, the CC list is not recoverable and must be recreated manually using the Edit CC List function.
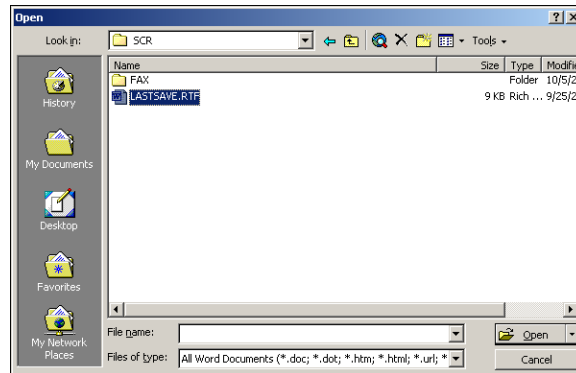
14. Proceed with completing and saving your document.

Retrieving a "TOO BIG" Document

To protect your facility's network from excessively large documents, ChartScript limits document size to 200 KB. If you attempt to save a document that is larger than 200 KB, a notice will appear.

♦ **To retrieve TOOBIG.RTF**

1. Select **OK** on the message box that appears. Be sure to write down the path to the document so that you can browse to it easily.

2. Start Word outside of ChartScript.

3. From the **File** menu, select **Open**.

4. On the Open window, browse to the path given on the message box. Select the document and select **OK**.

5. Highlight the body of the recovered document and select **Copy** (CTRL+C).

6. Do not copy headers, footers, signature lines, or CC lists; copy only the body of the document.

7. From the **File** menu, select **Exit Document** to close Microsoft Word. You do not need to save the document; however, you may choose to do so as an additional safety measure.

8. Start ChartScript. On the ChartScript main window, select **Add**.

9. Proceed as if you were creating a new document. On the Add a Document window, recreate the demographics window for the document. Select **Document**.

   Note: The demographics window is not recoverable and must be recreated manually.

11. In Word inside of ChartScript, place your cursor in the proper location and select **Paste** (CTRL+V) to paste the text into the document.
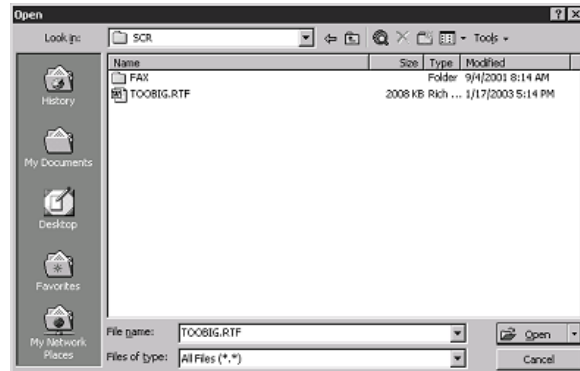
Note: The CC list is not recoverable and must be recreated manually using the **Edit CC List** function.

12. To ensure that you do not receive the TOOBIG message again, remove or adjust anything in the document that could be contributing to the large byte size, such as graphics, large tables, and so on. Proceed with completing and saving your document.

CHAPTER 8 | # Reporting Your Productivity

With the User's Documents report, you can view and print a report of your productivity over a range of time. This report includes statistics only for the user logged on to ChartScript.

♦ **To generate the report**
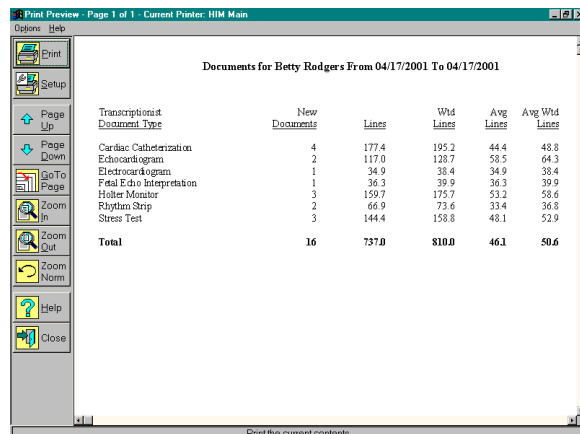
1. From the **Reports** menu, select **User's Documents**.
2. Type a start date for the reporting period.
3. Type an end date for the reporting period. Select **OK**.
4. On the Printer Setup window, do one of the following:
   - Select **Print** to print the report to the selected printer.
   - Select **Print Preview** to view the report on your monitor.
6. When previewing the report, select to print the report.
7. Select **Close** to exit the report.

Note: Your statistics are available for 13 months.

The Print Preview window at right shows a sample Users Documents report.

The Users Documents report provides the following information:

❒ **Title.** Displays your name and the selected date range.

❒ **Document Type.** Lists the various document types that you created or edited during the date range. Your statistics are indicated for each document type.

❒ **New Documents.** Displays the number of documents that you initiated during the date range. This column does not include a count of the documents that you edited for other transcriptionists during the date range.

❒ **Lines.** Displays the number of lines that you transcribed during the date range. This column includes all lines added to documents both when adding new documents and when editing existing documents.

❐ **Wtd Lines.** Displays the number of weighted lines that you transcribed during the date range. This column shows the extra credit that you earned for typing documents with a high level of difficulty because of the document type, the dictating provider or a combination of both.

Note: For more information about weighting by document type or provider, see your ChartScript administrator.

❐ **Avg Lines.** Displays the average number of lines per document for the date range.

❐ **Avg Wtd Lines.** Displays the average number of lines per document for the date range after being multiplied by the document type weight and the provider weight values.

❐ **Totals.** Displays the grand total of Lines and Wtd Lines for the date range. Also indicates the combined Avg Lines and Avg Wtd Lines for all document types.
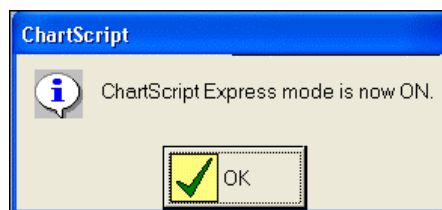
CHAPTER 9

Using ChartScript Express

With ChartScript® Express™, you can transcribe documents using a text editor, rather than typing directly into Microsoft Word. ChartScript Express can be used by transcriptionists using ChartScript or WebLinc Script who do not have the need to access all of the features that Word offers in its interaction with ChartScript. You must still have Word loaded on your workstation in order to merge the text onto the format file when saving the document. The merged text takes on the characteristics of the format file, including the font size and style. ChartScript Express can be useful for remote transcriptionists who are not able to attend the full ChartScript transcriptionist training. ChartScript Express can only be used for adding new documents into ChartScript, not for editing current ChartScript documents.

ChartScript Express is a workstation-specific setting. If a user turns on ChartScript Express on their workstation, ChartScript Express will be enabled for any user who logs onto that workstation. If the user does not want to use ChartScript Express, they must disable it on the workstation.

Starting ChartScript Express

♦ **To start transcribing in ChartScript Express mode**

1. From the **Options** menu, select **ChartScript Express**. A message window appears letting you know that ChartScript Express mode is now activated.

2. Select **OK**. You now can begin adding documents in ChartScript Express mode.

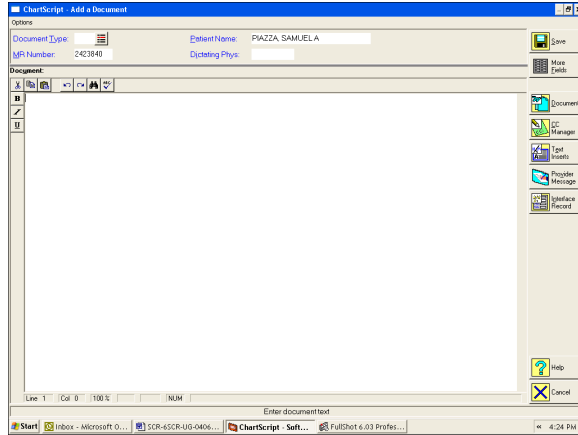## Adding a New Document in ChartScript Express Mode

The process of adding a document in ChartScript Express is for the most part the same as described in Chapter 4 of this guide. There are a few differences to take note of, however.

After searching for the patient information and selecting a document type, you are presented with the ChartScript Express entry window. When working in ChartScript

Express mode, the window is split horizontally. The upper portion contains the required demographic fields for that document type and the lower portion is the text editor.
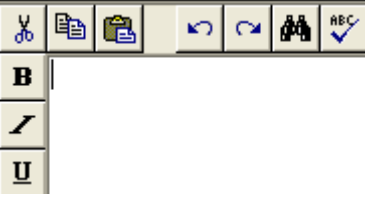
The ChartScript buttons are positioned along the right side, and function the same way that they would in ChartScript Add mode. You still have access to the CC manager, text inserts, and abbreviation expanders. The demographics screen is simplified and only contains the key fields for the document type and corresponding format file that you are creating. All of the other demographics fields are accessible by selecting **More Fields**.

The table below describes the buttons on the Add a Document window when working in ChartScript Express mode.

Button	Description
Save	Saves the demographic information without creating the document.
More Fields (F3)	Displays demographic information that has been suppressed.
Document	Displays the document in Microsoft Word so that you can edit the document. **Note**: After selecting **Document**, you will not be able to re-enter ChartScript Express mode for this document.
CC Manager	Opens the CC List for Document window where you can select providers to carbon copy for this document.
Text Inserts	Opens the Text Inserts window where you can select inserts to add to your document.
Provider Message	Opens the ESA Message window where you can enter a message for the provider.
Interface Record	Searches for an interface record and uses the information found to replace or populate the demographic information. This feature is particularly useful for locating visit-specific information that may have been missed or erroneously selected during the initial search. See the "Changing Document Demographics" section on page 6-4 for details.

Button	Description
Help	Displays ChartScript Help for this window.
Cancel	Closes the window without saving changes or creating the document.
	These buttons that are above the typing window control formatting of the text while you are transcribing in the window. **Note**: Any formatting that you add may be lost when the document is merged with the format file for this document type. The format file controls the formatting of the text once it is merged.

Options Menu

The **Options** menu in ChartScript Express corresponds to the **File** menu that appears when you enter Word from ChartScript, with a few differences. The additional options on this menu are **More Fields**, **Expand Insert**, **Move to Next Jump Code**, **Spell Check Document**, **Abbreviations**, **Clear Document Text**, **Provider Message**, **Interface Record**, and **Edit Document in MS Word**.

Quitting ChartScript Express

♦ **To quit ChartScript Express**

1. From the **Options** menu, select **ChartScript Express**. A message window appears letting you know that ChartScript Express is now inactivated.

2. Select **OK**. You now can work in standard ChartScript mode.

CHAPTER 10

Using In-House Backup
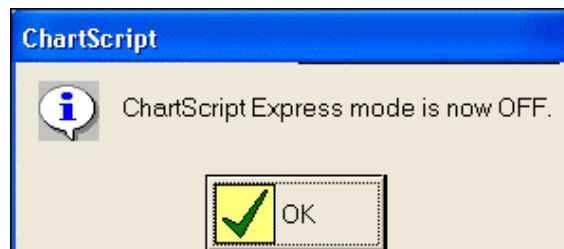
Using In-House Backup, you can continue to transcribe documents when the network or ChartScript is unavailable. In-House Backup also works with VoiceScript. For instructions on selecting VoiceScript settings, see Appendix F, "VoiceScript Settings."

Refreshing In-House Backup Files

Be sure to keep your local In-House Backup files current so that the latest provider list, text inserts, abbreviations, and document types are available, if needed.

♦ **To refresh In-House Backup files**

1. From the ChartScript Import menu, select Install/Refresh In-House Backup Files.

2. On the Install/Refresh In-House Backup Files window, verify the path of your local files. The default location is C:\Ihbkup. Also, select ⸋ adjacent to the **Personal Abbreviations/Text Insert Files to Include** field.

3. On the dialog box that appears, select the initials of the users whose expanders should be copied down to the workstation.

4. Select **OK** twice. The In-House Backup files are copied to the workstation.

5. Select **OK** again to clear the message prompt.
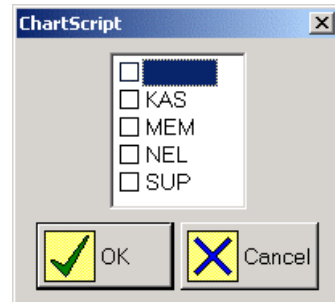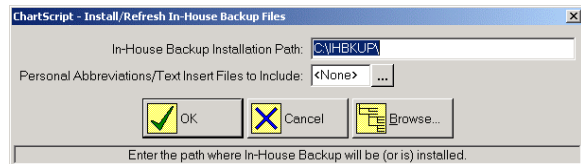
Starting In-House Backup

♦ **To start In-House Backup**

1. If you do not see an In-House Backup icon on your desktop, from the Windows **Start** menu, select **Programs ▸ SoftMed for Windows ▸ In-House Backup**.

2. On the In-House Backup window, select your user ID and a document type.
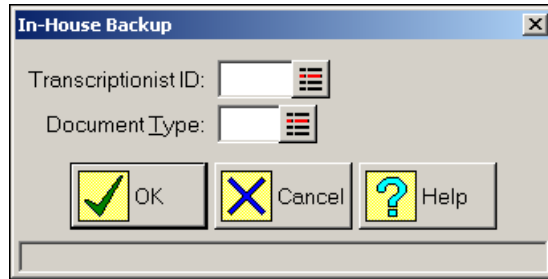
3. Select **OK**. The In-House Backup main window appears.
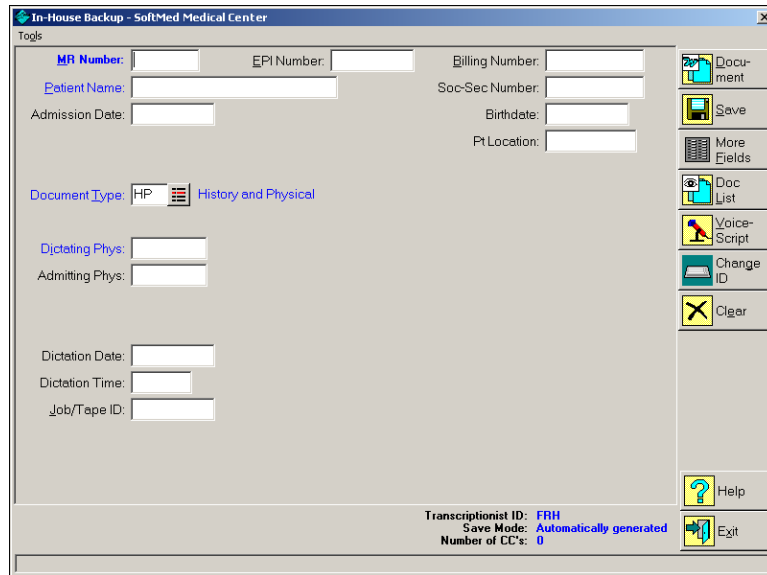
Creating New Documents

♦ **To create a new In-House Backup document**

1. On the In-House Backup main window, type demographic information for the document. You must enter information into all fields that are required in ChartScript. Fill in as many of the fields as you can to assist ChartScript in importing the document later.

    Note: At a minimum, you must indicate the dictating physician and one of the following: medical record number, billing number, order number, EPI number, or job/tape ID if your facility uses DDSI.

2. Select **Document** to open Microsoft Word and transcribe the document. An In-House Backup document does not include header information, footer information, or signature lines. These sections are added to the document when it is imported into ChartScript.
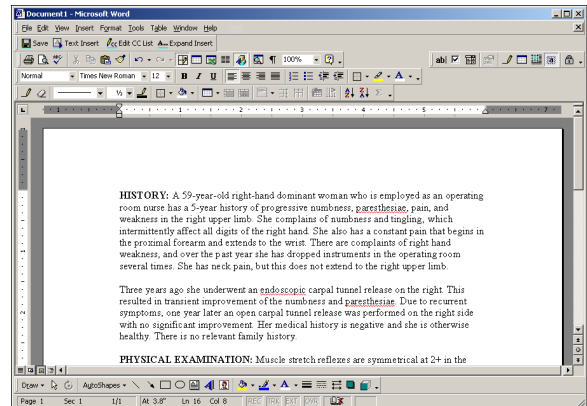
    While editing an In-House Backup document, the following ChartScript features are available:

    -   Edit CC List (CTRL+E).
    -   Insert Address (CTRL+R).
    -   Change Document Type (on the **File** menu).
    -   Text Inserts (CTRL+N) and Abbreviations (CTRL+A).
    -   Document Status (CTRL+O).
    -   Creating or Viewing an ESA Message (CTRL+L).
    -   Edit Demographics

    Each of these features works in the same manner in both ChartScript and In-House Backup and is discussed in Chapter 4, "Creating a Document."

3. When you finish transcribing the document, press CTRL+S to save the document, or on the ChartScript toolbar in Word, select Save.

4. On the dialog box that appears, in the **Copies** field, type the total number of providers receiving extra copies (not ProviderID carbon copies). For more information, see the "Adding Extra Copy Providers" section below.

5. Confirm that the **Batch** Print check box is selected so that the document will be batch printed after it is imported into ChartScript. Select **OK**.
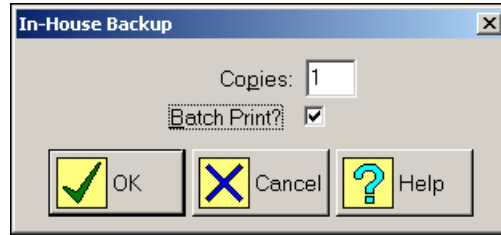
Adding Extra Copy Providers

You can print extra copies of an In-House Backup document for providers who are not in the ProviderID database in In-House Backup. If a provider or entity is not found, they cannot be added to the CC list using the Edit CC List (CTRL+E) function. SoftMed recommends the following procedure for indicating non-ProviderID copy recipients. For this example, assume that John Smith, M.D. and Tom Johnson, D.O. are consulting physicians not in ProviderID and need copies of an In-House Backup document.

♦ **To add extra copy providers**

1. Transcribe the document as described in the "Creating New Documents" section on page 10-3.

2. Before saving the document, go to the end of the body of the document. On a blank line, type *{SEC XCOPY}* to indicate to ChartScript that this section includes the names of non-ProviderID copy recipients.

3. On the next line, press TAB, and then type an asterisk and the provider/entity's name.

4. On the next line, type *{END}*.

   Using the example described above, the resulting section would appear as at right.

5. After the document has been completed, select **Save** (CTRL+S).
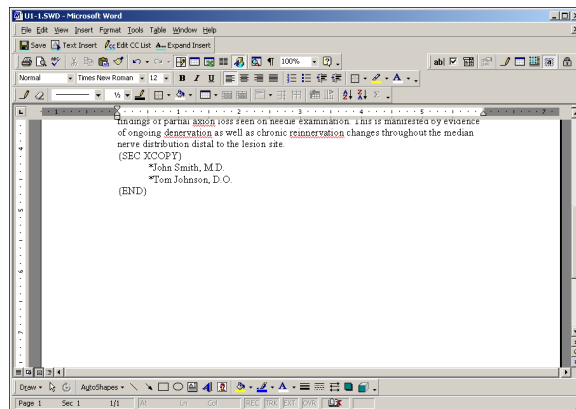
6. In the **Copies** field, type the total number of providers receiving extra copies. Remember to indicate one copy for each provider/entity that is added to the XCOPY section. In this example, two non-ProviderID copy recipients have been added, so the number of copies should be set to two. Select **OK**.
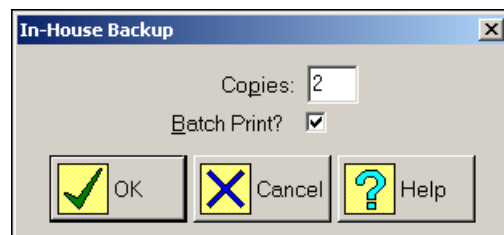
Editing Documents

You can edit In-House Backup documents that you have not yet imported to ChartScript.

♦ **To edit an In-House Backup document**

1. On the In-House Backup main window, select **Doc List**.

2. On the Saved Documents window, select a document from the list and select **OK**. The document opens in Word.
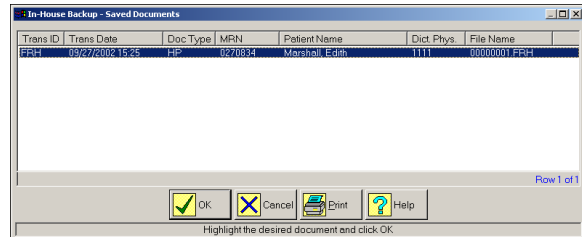
Changing the Document Type

Use the Change Document Type option if, after you have started a document, you realize that the document type is incorrect.

♦ **To change the document type by copying text**

1. Select any text in the body of the document that you want to keep.

2. From the **File** menu in Word, select **Document Type**.

3. On the Change Document Type dialog box, in the **Document Type** field, select a new document type. Select **OK**.

4. On the In-House Backup main window, verify the demographic information and select **Document**. In-House Backup creates a new document in Word.

5. Read the Change Document Type-Finished dialog box and select **OK**.

6. In the new document, place the cursor where you want to place the text from the first document and, from the **File** menu, select **Paste: Document Type Text**.
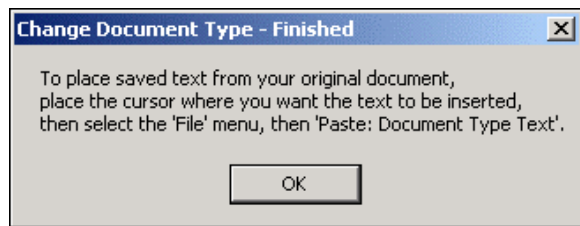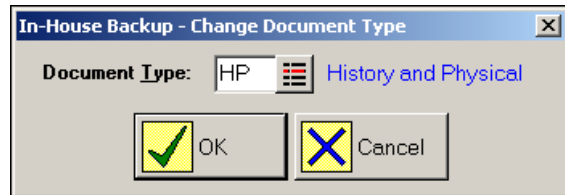
♦ **To change the Document Type without copying text**

1. From the **File** menu in Word, select **Document Type**.

2. On the dialog box that appears, select **Yes**.

3. On the Change Document Type dialog box, in the **Document Type** field, select a new document type and select **OK**.

4. On the Add a Document window, verify the demographic information and select **Document**. In-House Backup creates a new document in Word.

5. If you attempt to paste text into the new document, the dialog box at right appears. Select **OK**.
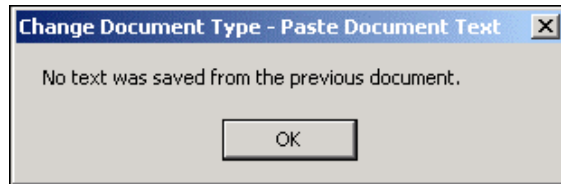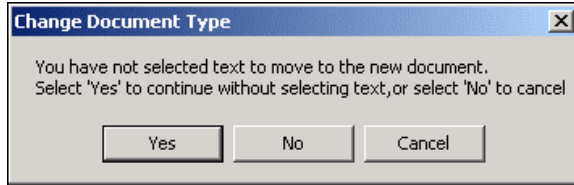
Editing Demographics in In-House Backup

You can edit existing document demographic information and save the changes without changing the text in Word.

♦ **To change document demographic information**

1. On the In-House Backup main window, select **Doc List**.

2. On the Saved Documents window, select a document. Select **OK**. The document's demographics appear on the In-House Backup main window.

3. Change the appropriate demographic information. If the demographic field that you want to change does not appear on this window, select **More Fields** to display the remaining demographic fields.

4. Select **Save** to save your changes and close the window.

Retrieving Interrupted Documents in In-House Backup

If Word unexpectedly shuts down while you are transcribing a document, you can retrieve a backup copy. The procedures for retrieving interrupted documents and Lastsave.rtf files are the same for In-House Backup as they are for ChartScript. For instructions on retrieving interrupted documents using the Word AutoRecover feature, see the "Retrieving Interrupted Documents" section on page 7-1. For instructions on retrieving the Lastsave.rtf file, see the "Retrieving Lastsave.rtf" section on page 7-2.

Moving In-House Backup Documents to the Network

When ChartScript or the network becomes available, move the In-House Backup documents from your local drive to the network.

♦ **To move In-House Backup documents**

1. On the ChartScript main window, from the **Import** menu, select **Move In-House Backup Documents from Local PC to Network**.

2. At the message prompt, select **OK**.

When the ChartScript administrator runs Automatic Document Import, the documents will import into ChartScript.

Using WebLinc Script

With WebLinc Script, you can transcribe documents remotely using all of the capabilities of ChartScript that you would normally have at your facility. Since connectivity occurs over the Internet, this is a fast, convenient way to use ChartScript without having to be in the facility itself. For more information, see the *WebLinc Getting Started Guide*.

Starting WebLinc Script

The first time that you start WebLinc Script, you must create a central user name and password and then link your central user name to your ChartScript user name.

♦ **To start WebLinc script for the first time**

1. Start WebLinc Script. The WebLinc Script client attempts to update any out-of-date files on the workstation. The WebLinc Script client then attempts to connect to the WebLinc Server.

2. On the Login window, select **Create Login ID**.

3. On the New Central Login ID window, type a new Login ID, your First Name, and your Last Name. Type a password in the **Password** and **Confirm Password** fields. Select **OK**.

   Note: Use this Login ID and Password the next time that you start WebLinc Script.

4. On the ChartScript Login window, type your ChartScript password and then select **OK**.

   Note: If your SoftMed system has been upgraded, your old password should still be active. If you are a new user, your ChartScript administrator must tell you your password.

5. On the Link to Central User Table dialog box, confirm that you are linking to the correct ChartScript user and select **Yes**. If you are not linking to the correct user, select **No** and try entering your ChartScript password again.
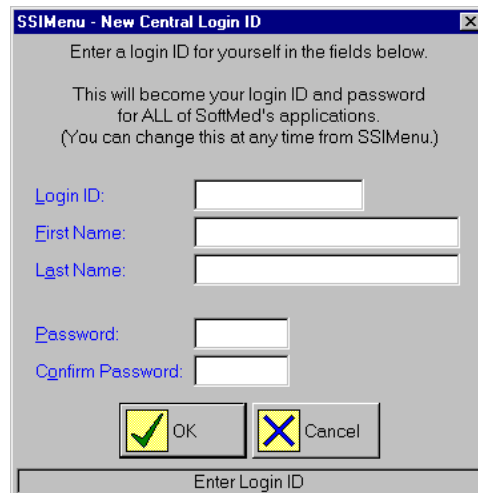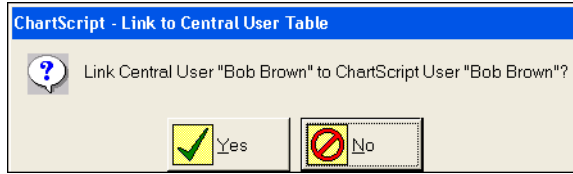
♦ **To start WebLinc Script after the first time**

1. Start WebLinc Script. The WebLinc Script client attempts to update any out-of-date files on the workstation. The WebLinc Script client then attempts to connect to the WebLinc Server.

2. On the Login window, in the **User ID** and **Password** fields, type the login ID and password that you created in Step 3 on the previous page. Select **OK**, and the Search for and Add Documents window appears.

WebLinc Script Menu

Tools Menu

Use the **Tools** menu to view your statistics (by selecting **Users Documents**), to set your VoiceScript settings, to refresh offline files, and to move offline documents from your local workstation to the server (by selecting **Move Off-Line Documents from Local PC to Server**). See the WebLinc Script Offline chapter for more information on these two menu options. You also can information about WebLinc Script by selecting **About WebLinc Script**.
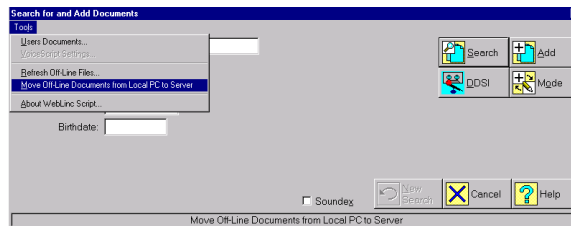
Quitting WebLinc Script

♦ **To quit WebLinc Script**

1. On the Search for and Add Documents window or the Search for and Edit Documents window, select **Cancel**.

2. On the dialog box that appears, select **OK** to exit from the WebLinc Script session.
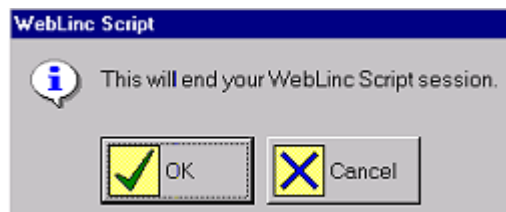
Adding a New Document in WebLinc Script

The process of adding a document in WebLinc Script is the same as described in Chapter 4 of this guide.

Note: When editing a document in WebLinc Script, there is not an option to search using Report Generator on the Search for and Edit window.

Considerations When Using VoiceScript

After selecting a job from the Jobs Assigned to You window, if the data stream fails to completely load, WebLinc automatically attempts to reload the voice file. Reloading is controlled by a timeout period defined in your VoiceScript Settings (see Appendix F).

Each time a voice job is received at your workstation, the internal counter starts. You should begin playback as soon as the blue progress bar indicates that at least 30 seconds of the voice job has been streamed.

If the system detects that it has not received any data within the timeout period set on the workstation, the player is closed, and the stream is cancelled and automatically restarted. The portion of the voice job already received by your workstation is retained, and streaming restarts from that point forward. The player reappears on your workstation. If you had been listening to the job at the time that the player closed, you can return to your previous position by pressing Alt +].

Streaming makes up to three attempts to deliver the complete voice job. If streaming fails for the third time, the player closes and an error message is displayed. The error message instructs you to turn off streaming and load the job in its entirety.

Note: WebLinc provides an option to completely disable streaming and instead download a voice file in its entirety. This option is controlled by the **Enable Digital Streaming** parameter. From the **Tools** menu, select **VoiceScript Settings** (see Appendix F for details about the settings). The default setting is on. SoftMed recommends turning this off only as a last resort. If this parameter is turned off to load a voice job, SoftMed recommends that once that job is completed, you turn this parameter back on prior to accessing another job.

When the player is waiting for parts of the voice job to stream to the workstation, the blue progress bar momentarily changes from blue to yellow. When it detects additional parts of the job being streamed, the progress bar changes back to blue. When the player detects that the entire voice file has been successfully streamed, the progress bar remains blue and fills the width of the lower bar.

Note: A yellow progress bar does not indicate a time out or that the stream is going to be restarted. It simply indicates a momentary pause in the normal streaming process.

Interruptions in Connectivity While Adding a New Document

There may be instances when
WebLinc connectivity is interrupted
while creating a new document.
When this occurs, an attempt is made
to re-establish the connection. If the
connection is re-established, you are able to continue transcribing and will notice no
changes. Five attempts at re-connecting will be made. If after five attempts the
connection has not been re-established, the message above will appear.

Select **Retry** if you would like to continue attempting to reconnect, or **Cancel** if you
would like to cancel and exit WebLinc Script. If you select **Cancel**, see the LASTSAVE
instructions in the "Retrieving an Interrupted Document in WebLinc Script" section on
page 11-4 to retrieve your interrupted document.

If while you are using WebLinc Script you would like to check whether
you are connected to the server, there is a notification area in the task
bar, shown at right, that will alert you to connection status. If the icon is
blue, you are connected. If the icon is red, you are not.

Retrieving an Interrupted Document in WebLinc Script

In WebLinc Script there are several methods that can be used to retrieve a document.

❐ Microsoft Word AutoRecover feature: If Microsoft Word shuts down unexpectedly
while transcribing a document, you can retrieve a backup copy. This can be done
using the instructions outlined on page 7-1of this guide.

❐ WebLinc Document Recovery
feature: If WebLinc Script detects
a loss of connection between the
user and the WebLinc server, the
message at right appears.
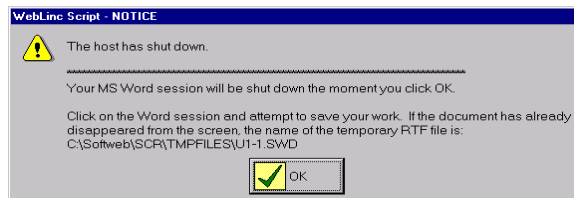
❐ ChartScript LastSave feature: If
there is a problem during the save
process, the message at right
appears:
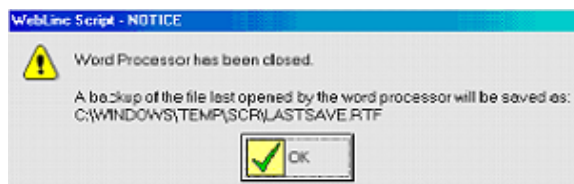
♦ **To use LastSave**

1. Browse to C:\softweb\scr\tmpfiles and open the file LASTSAVE.RTF.

2. Select the body of the text and copy it (CTRL+C).

3. **Note:** Do not copy headers, footers, signature lines, and CC lists; only the body of
the document.

4. From the **File** menu, select **Exit** to exit Microsoft Word. You do not need to save
the document; however, you may choose to do so as an additional safety
measure.

5. Start WebLinc Script.

6. Proceed as if you were creating a new document.

   Note: The demographics window of an auto-saved document is not recoverable and must be recreated manually.

7. On the Add a Document window, recreate the demographics window for the document. Select **Document**.

8. In ChartScript Word, place your cursor in the proper location and press CTRL+V to paste the text into the document.

9. **Note:** The CC List of an auto-saved document is not recoverable and must be recreated manually using **Edit CC List**.

10. Proceed with completing and saving the document.

♦ **To use WebLinc document recovery if the document is still on the monitor**

1. Select the body of the text and copy it (CTRL+C).

2. **Note:** Do not copy headers, footers, signature lines, and CC lists; only the body of the document.

3. From the **File** menu, select **Exit** to exit Microsoft Word. You do not need to save the document; however, you may choose to do so as an additional safety measure.

4. Start WebLinc Script.

5. Proceed as if you were creating a new document.

   Note: The demographics window of an auto-saved document is not recoverable and must be recreated manually.

6. On the Add a Document window, recreate the demographics window for the document. Select Document.

7. In ChartScript Word, place your cursor in the proper location and press CTRL+V to paste the text into the document.

   Note: The CC List of an auto-saved document is not recoverable and must be recreated manually using **Edit CC List**.

8. Proceed with completing and saving the document.

♦ **To use WebLinc document recovery if the document has disappeared from the monitor**

1. Browse to c:\softweb\scr\tmpfile and open the file u1-1.swd in Microsoft Word.

2. Select the body of the text and copy (CTRL+C). **Note:** Do not copy headers, footers, signature lines, and CC lists; only the body of the document.

3. From the **File** menu, select **Exit** to exit Microsoft Word. You do not need to save the document; however, you may choose to do so as an additional safety measure.

4. Start WebLinc Script. Proceed as if you were creating a new document.

   Note: The demographics window of an auto-saved document is not recoverable and must be recreated manually.

6. On the Add a Document window, recreate the demographics window for the document. Select **Document**.

7. In ChartScript Word, place your cursor in the proper location and press CTRL+V to paste the text into the document.

   Note: The CC List of an auto-saved document is not recoverable and must be recreated manually using Edit CC List.

8. Proceed with completing and saving the document.

Reporting Productivity

With the User's Documents report, you can view and print a report of your productivity over a range of time. This report includes statistics only for the user logged into WebLinc Script.

♦ **To generate the report**

1. From the **Tools** menu, select **User's Documents**.
2. Type a start date for the reporting period.
3. Type an end date for the reporting period. Select **OK**.
4. On the Printer Setup window, do one of the following
   ▪ Select **Print** to print the report to the selected printer (if you have a printer attached to your workstation).
   ▪ Select **Print Preview** to view the report on your monitor.
5. Select **Close** to exit the report.

Note: Your statistics are available for 13 months.

Using WebLinc Script Offline

WebLinc Script Offline is a downtime productivity solution for users of WebLinc Script. It is a variant of In-House Backup that can be used to transcribe remotely when ChartScript, the facility's network, or your Internet connection is unavailable. Since most of the functions in WebLinc Script Offline work in the same manner that they do in In-House Backup, refer to the "Using In-House Backup" chapter earlier in this guide for information on functions not included in this chapter, such as creating new documents, editing documents, and so on.

Two of the menu choices on the WebLinc Script menu apply directly to WebLinc Script Offline. They are **Refresh Off-Line Files** and **Move Off-Line Documents from Local PC to Server**.

Refresh Off-Line Files refreshes the local program files. When you select **Refresh Off-Line Files**, all applicable WebLinc Script Offline files are refreshed on your workstation.
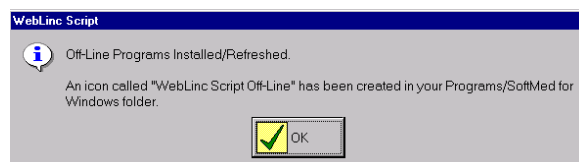
Refreshing WebLinc Script Offline Files

Be sure to keep your local WebLinc Script Offline files current so that the latest provider list, text inserts, abbreviations, and document types are available, if needed.

♦ **To refresh WebLinc Script Offline files**

1. From the **WebLinc Script Tools** menu, select **Refresh Off-Line Files**.

2. Select **OK** to clear the message prompt.

Note: If the NORMALS.SCR file needs to be refreshed and the file is larger than 3MB, you will receive a message telling you how big the file is on your host system so that you will have some sense of how long the download might take, given your connection speed. If you decide not to refresh your local copy and you don't have a copy yet, a blank one is written to the WebLinc Script Offline subdirectory. If the NORMALS.SCR file is less than 3MB, the file is automatically downloaded.

Moving WebLinc Script Offline Documents to the Network

When ChartScript or the network becomes available, move the WebLinc Script Offline documents from your local drive to the network.

♦ **To move WebLinc Script Offline documents to the network**

1. From **WebLinc Script Tools** menu, select **Move Off-Line Documents from Local PC to Server**.

2. At the message prompt, select **OK**.

When the ChartScript administrator runs Automatic Document Import, the documents import to ChartScript.

Document Importing

The ChartScript importing process enables facilities to receive document files from an outside source and import them into ChartScript so that they are available in the database along with documents that were typed directly into ChartScript.

ChartScript can accept documents that were transcribed using HomeScript and In-House Backup, as well as documents that were transcribed using other word processing programs, as long as the documents are formatted using structured, unstructured, or XML format. This chapter discusses how to import documents into ChartScript and provides some basic troubleshooting techniques.

Consult the *ChartScript Importing Guide* or the "Document Importing" chapter of the *ChartScript Management Guide* for more information.

Importing Processes

Two types of importing are available in ChartScript: automatic importing and single document importing. The automatic importing process can be run as a continuous process, or it can be run as needed. This section describes the importing processes and how to perform them.

Non-Continuous Automatic Importing

The automatic importing process is called "automatic" because ChartScript retrieves and imports each document without manual intervention after the process has been started. Non-continuous automatic importing requires a user to initiate the process in ChartScript.

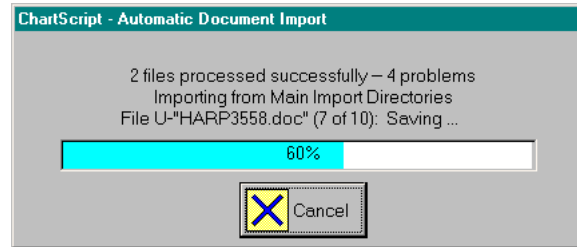♦ **To perform the automatic import process**

1. From the ChartScript toolbar, select **Import**.

2. On the message box that appears, indicating how many document files there are to import, select **Yes**.
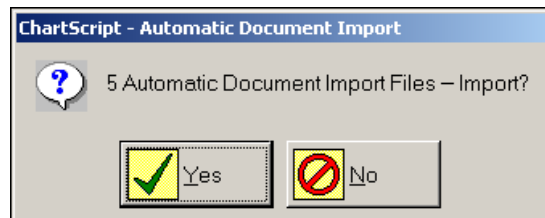
3. On the message box that appears, asking whether you want to process files continuously, select **No**. See the following section on "Continuous Automatic Importing" for more information on this step.
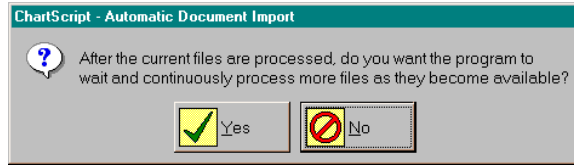
4. The automatic importing process starts.

5. Documents that meet the requirements for automatic importing are merged into ChartScript. Documents that do not meet the requirements are moved to the Impsingl directory and must be imported using the single document importing process.

6. When the import process is complete, print the Import Problems report before closing. If you do not print before closing, the information can be viewed later in the Auto Import Error Log.
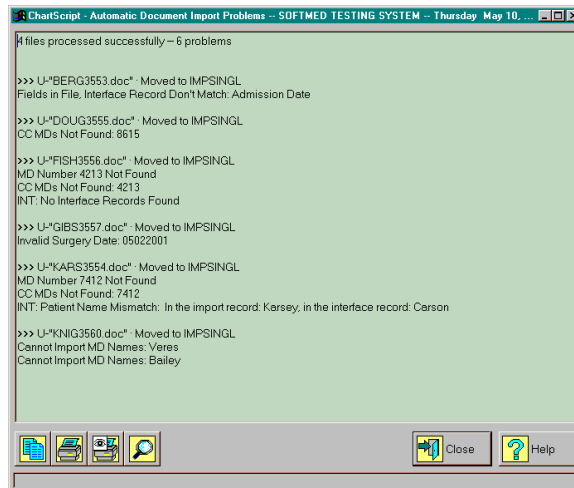
Continuous Automatic Importing

ChartScript is capable of importing documents continuously rather than waiting for someone to initiate a non-continuous automatic import. This continuous process is advantageous because documents are detected and imported into ChartScript as soon as they are received from the external transcriptionists.

Note: The continuous automatic importing process must be run by itself on a dedicated workstation.

♦ **To start continuous automatic importing**

1. From the ChartScript toolbar, select **Import**. A message box appears telling you how many document files there are to import.

2. Select **Yes**. A message box appears asking if you want to process files continuously.

3. Select **Yes**. ChartScript attempts to import any documents that are waiting to be imported. Documents that meet the requirements for automatic importing are merged into ChartScript. Documents that do not meet the requirements are moved to the Impsingl directory and must be imported using the single
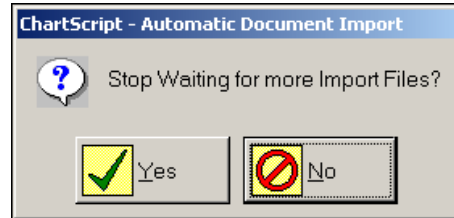
document importing process. After the automatic importing process is completed, ChartScript continues to wait for any new documents so that they can be imported as soon as they arrive.

Note: If no documents are waiting to be imported, the message at right appears.
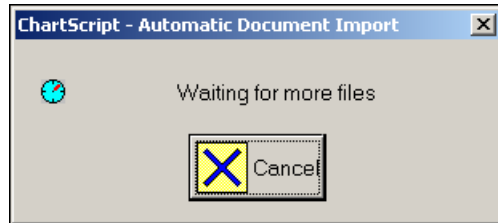

♦ **To stop continuous automatic importing**

1. Select **Cancel**.

2. The message at right appears.

3. Select **Yes**. Continuous import stops, and you must select **Import** from the ChartScript toolbar to restart importing.

Single-Document Importing

The documents that do not import successfully during an automatic document import session are placed in the Impsingl directory. These documents must be imported individually so that the information on the document can be verified. Often documents must be imported individually because important information is missing or incorrect. Use the Auto-Import Error Log to assist with rectifying the issues associated with each document that requires manual intervention. See the "Auto-Import Error Log" section later in this chapter for more information.

♦ **To verify and import single documents**

1. From the ChartScript toolbar, select **Add**.

2. On the Search for and Add Documents window, select **Import** (F11).
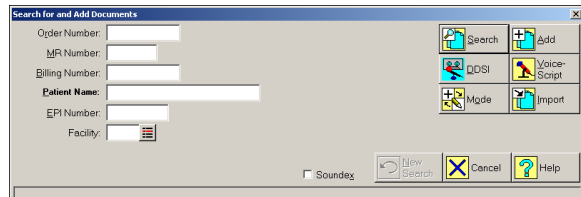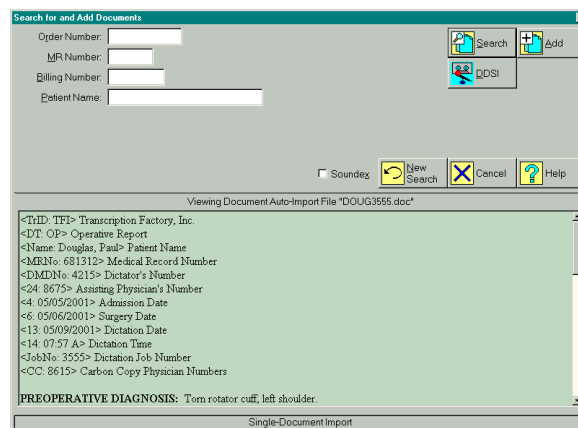
3. On the Import Document window, select the document file name that you want to import and then select **OK**.
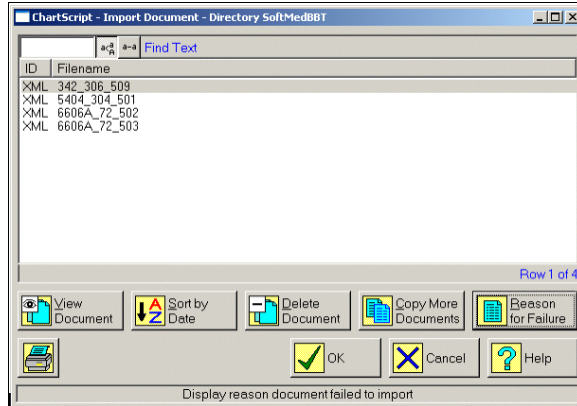
The contents of the document file are displayed at the bottom of the window.

Note: If the document fails to import, select **Reason for Failure** to view the reason why it failed. Then you can try to import the document again after correcting the error.

4. **Facilities that use DDSI:** Select **DDSI**. On the Search Dictation Interface window, search for the job number provided in the document displayed at the bottom of the window.

If the job number is found, ChartScript retrieves the dictation record and then automatically searches the patient interface records using the patient identifier specified in the dictation record (usually the medical record number or billing number). Three possible situations may result:

- If ChartScript finds exactly one matching interface record, it automatically selects the record and displays to the Add a Document window.
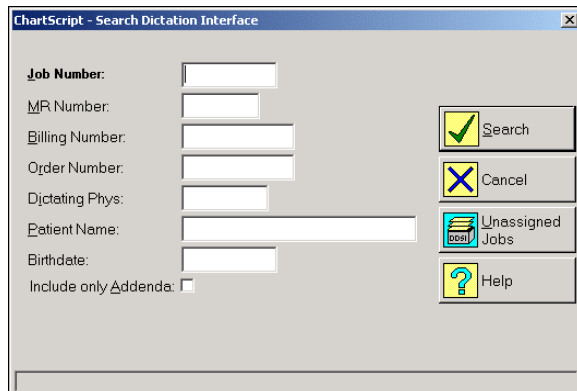
Note: If the dictation record does not link to a ChartScript document type, the Document Type dialog box appears. Select the document type that you are importing and select **OK**. The Add a Document window appears.

- If multiple matching records are found, they appear in the Patient Interface Records found section at the bottom of the window. Select the correct patient interface record and then choose **Select**. The Add a Document window appears.

  Note: If the dictation record does not link to a ChartScript document type, the Document Type dialog box appears. Select the document type that you are importing and select **OK**. The Add a Document window appears.

- If the dictation search does not yield a list of patient interface records, or if your facility does not use DDSI, proceed to Step 5.

5. **Facilities that do not use DDSI:** Using the search window, search for the patient using the medical record number, patient name, or other information provided in the document displayed at the bottom of the window.

   Two possible situations may result:

   - If ChartScript finds one or more matching interface records, they appear in the Patient Interface Records found section at the bottom of the window. Select the correct patient interface record and then choose **Select**. The Add a Document window appears.

     Note: If the document file does not include a document type, or if the document type is invalid, the Document Type dialog box appears. Select the document type that you are importing and select **OK**. The Add a Document window appears.

   - If the patient search does not yield a list of patient interface records, or if your facility does not use patient interface records, go to Step 6.

     Note: If you do not find a matching patient interface record using one field, such as the medical record number, SoftMed recommends trying several different fields, including the patient name and billing number, to search for a match before proceeding to the next step.
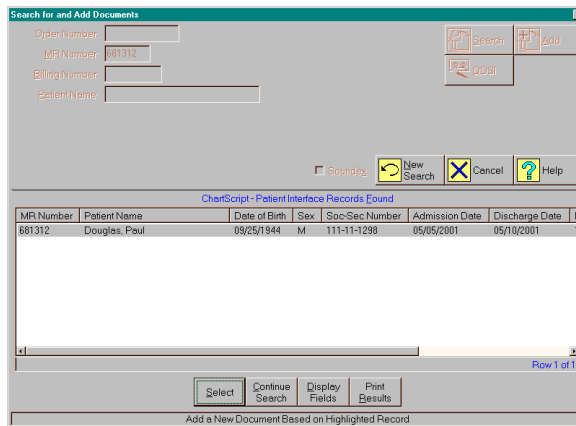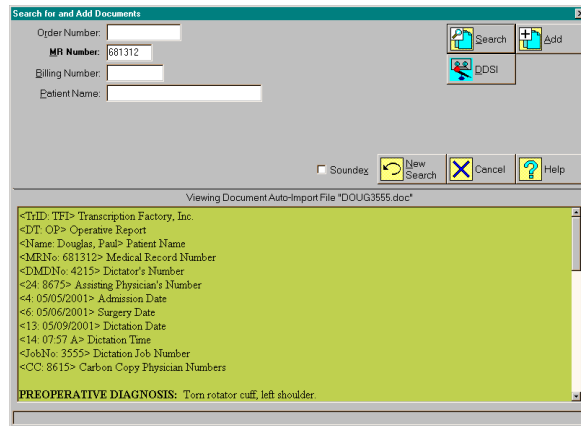
6. **Facilities with no Interface Data:** If your search via the patient and/or dictation interfaces did not yield a matching patient interface record, select **Add**. On the Document Type dialog box, select the document type that you are importing and select **OK**.

7. On the Add a Document window, verify the information in each data field and select **Document**.

   **Note:** To view the contents of the document file, select **View** (F2) on the Add a Document window.
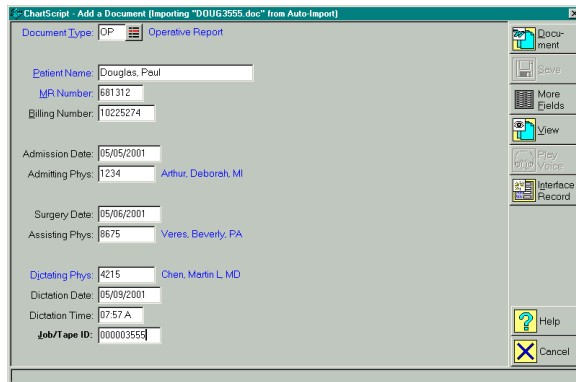
8. On the Transcriptionist to get keystroke credit dialog box, verify the transcriptionist's initials and select **OK**.
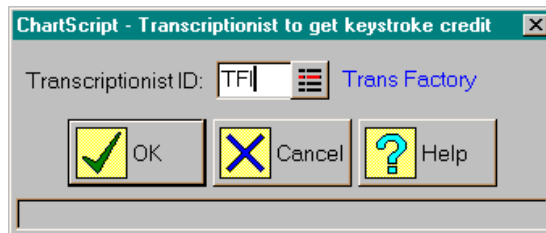
9. ChartScript opens the document in Word. Do one of the following:

   - Select **Save** (CTRL+S) to save the document and print it later as part of a batch.
   - Select **Print** (CTRL+P) to save the document and print it now.
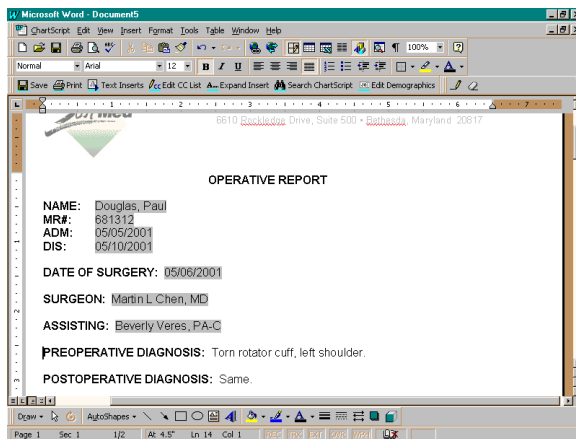
Troubleshooting Problems With Imported Documents

Auto-Import Error Log

The automatic importing process generates an error log that tracks the number of documents that imported successfully, as well as a list of the documents that did not import and require manual intervention. This log, called the Auto-Import Error Log,

provides a detailed list of the problems encountered for each document that did not import. It is very helpful in determining how to import each document individually.

♦ **To view and print the Auto-Import Error Log**

1. On the ChartScript main window, from the Reports menu, select **Auto-Import Error Log**.

2. On the Automatic Document Import Error Log window, select to print the log.
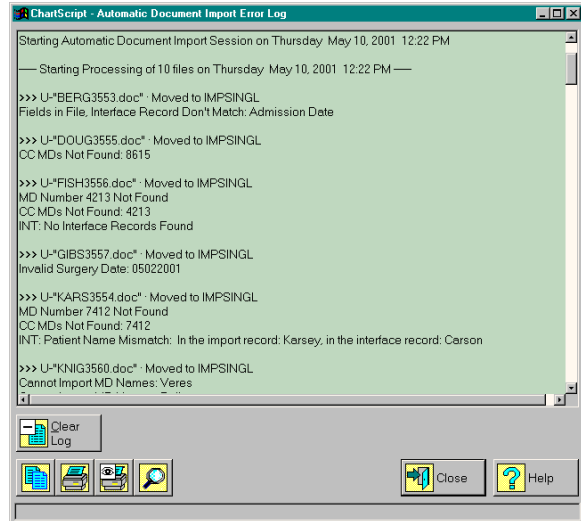
3. On the Printer Setup window, in the Printer Name field, select a printer. Select **Print**.

Note: SoftMed recommends that you develop a policy for rectifying the problems found in the Auto-Import Error Log using Single Document Importing, and a policy for deleting the old data in the Auto-Import Error Log occasionally by selecting **Clear Log**. After the Auto-Import Error Log is cleared, it cannot be retrieved.
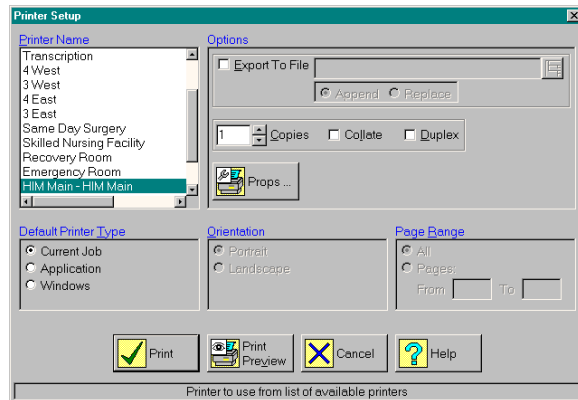
Resolving Importing Problems

See the "Error Glossary" and "Formatting Issues" sections in the "Document Importing" chapter of the *ChartScript Management Guide* for specific troubleshooting recommendations.

Batch Printing and ChartPrint

In addition to being a document creation program, ChartScript was designed to manage the document distribution process for your facility. Individual documents can be printed using the stat printing and reprinting processes that are described in Chapter 6. This chapter discusses other document distribution functions that you may need to use.

Batch Printing

Based on your facility's distribution needs, ChartScript uses batch printing to organize and distribute the documents that it produces efficiently. Batch printing enables ChartScript to gather groups of documents that have the same priority and distribution schedule and generate them at the same time.

After a transcriptionist types a document, it can be saved and flagged for batch printing later. When ChartScript processes a batch print job, only documents that have been marked with a "batch flag" are considered to be part of the print job. In addition to searching for a batch flag, a facility can also select other fields to define the grouping and sorting of each batch, such as document type, patient type, patient name, and so on.

The batch print flags associated with each document can be viewed in the BP (Batch Pending) column of the ChartScript Documents Found pane of the Search for and Edit Documents window.

The following is a summary of the available batch print flags.

❒ **O:** The originals and any extra copies that are indicated are flagged for batch printing. This flag indicates that either the document has no carbon copies or that the carbon copies are not flagged to batch print.

❒ **C:** The carbon copies that were indicated are flagged for batch printing. This flag indicates that either the originals and extra copies have already been printed or that they are not flagged to batch print.

❑ **A:** The originals, any extra copies, and the carbon copies are all flagged for batch printing. Often this flag indicates that the document has recently been transcribed or edited and is awaiting the next available batch print job so that it can be printed.

❑ **Blank:** None of the copies associated with the document are flagged to batch print. This flag indicates that either the document has never been flagged for batch printing or that all copies have been printed in previous batches.

Running Manual Batch Print Jobs

Batch print jobs can be run on demand at any time throughout the day. Manual batch printing is useful for situations in which the schedule for document distribution can vary greatly from day to day, or for occasional situations in which a batch that is typically run using an automatic ChartPrint schedule needs to be run outside of its regular schedule. Manual batch printing gives the users who handle document distribution more control and flexibility.

♦ **To run a batch print job**

1. On the ChartScript main window, from the toolbar, select **Batch Prt**.

2. On the Batch Print window, do one of the following:

   ▪ If you are creating a new batch print job, follow Steps 2-7 in the "Creating a Batch Print Job" section of the "Printing Functions" chapter of the *ChartScript Management Guide*.

   ▪ If you would like to run an existing batch print job, select **List Saved Reports**. Select the batch print job that you want to run and select **OK**.

3. Select **Print**.
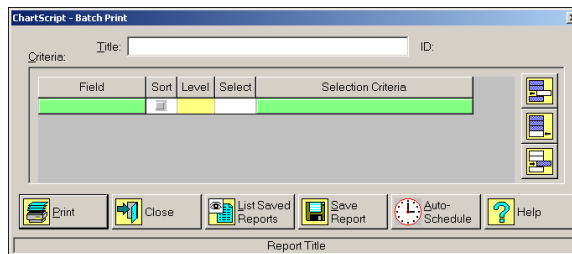
4. On the Batch Print-Document Print Configuration window, in the What to Print section, select whether to print Originals and Extra Copies only or to print Originals, Extra Copies, and CCs.

5. In the Print Rule for Originals/Extra Copies section, select the print rule that you want to use.

6. If you chose to print Originals, Extra Copies, and CCs, in the Print Rule For CCs (Print Method) section, select the print rule that you want to use. In the Sort CCs by section, select sorting by provider name or provider number.

7. If you chose to print Originals, Extra Copies, and CCs, in the Envelope Print Rule for CCs section, select an envelope rule, if necessary.
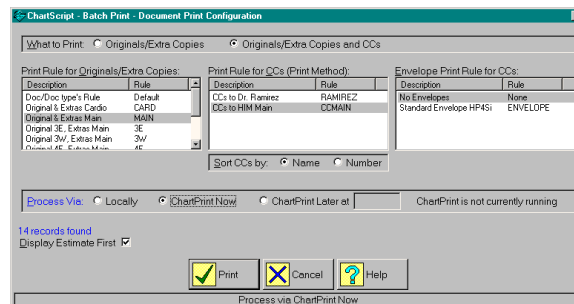
8. In the Process Via section, select one of the three options:
   - Select **Locally** if you would like to bypass ChartPrint and process the batch print job on your workstation. This option requires that the printer(s) being used be installed on your workstation.
   - Select **ChartPrint Now** if you want to send the batch print request to ChartPrint to be processed as soon as possible.
   - Select **ChartPrint Later at ___** if you would like to send the batch print request to ChartPrint to be processed at a later time. This option allows you to indicate the time that you want the batch print to be run by ChartPrint.

9. Select **Display Estimate First** if you want to see how many documents will be generated by the batch print that you are running.

10. Select **Print** to process the batch print job. If you elected to see an estimate first, the Batch Print Estimate window appears. Select **Close** when you are finished reading the estimate to continue the batch print. Select **Yes** on the message box that appears.

ChartPrint

ChartPrint is a program that runs on a dedicated PC on your network and enables you to track the status of print jobs that ChartScript users initiate from their workstations. ChartPrint can process "on demand" printing requests as they are received. In addition, it can also automatically run any scheduled print jobs that are processed on a regular basis.

ChartPrint Processor

The ChartPrint Processor must be running on a workstation before it can process any print jobs. This means that any type of print job that is submitted for immediate processing, as well as any jobs that are scheduled to print at specific times, will be held in the ChartPrint queue until the processor is started.

Starting the ChartPrint Processor

♦ **To start the ChartPrint processor**

❑ On the ChartPrint workstation, double-click the ChartPrint desktop icon.

The ChartPrint Job Processor window appears, and the ChartPrint processor begins processing immediately.

The ChartPrint Print Job Processor window provides the following information about ChartPrint activities:
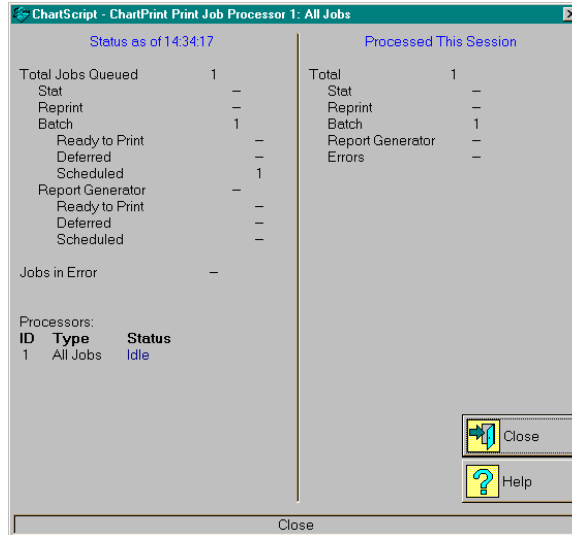
❒ **Title Bar.** Indicates the processor number and the types of print jobs that the processor will handle.

❒ **Status.** Shows the time that this processor last looked for print jobs to be processed. Every ten seconds ChartPrint updates the status of the print jobs and looks for new or scheduled jobs to be processed.

❒ **Total Jobs Queued.** The total number of all jobs that are queued and waiting to be processed by the ChartPrint processor.

❒ **Stat.** The number of jobs queued and waiting to be processed that were submitted from within individual documents as stat prints.

❒ **Reprint.** The number of queued jobs that were submitted through reprinting an individual document.

❒ **Batch.** The total number of batch print jobs queued, with subtotals for each of the various types of batch print jobs: Ready to Print (manually submitted jobs to be printed as soon as possible), Deferred (manually submitted but scheduled for a later time), and Scheduled (auto-scheduled at regular day and time intervals).

❒ **Report Generator.** The total number of report generator jobs queued, with subtotals for each of the various types of report generator jobs: Ready to Print (manually submitted jobs to be printed as soon as possible), Deferred (manually submitted but scheduled for a later time), and Scheduled (auto-scheduled at regular day and time intervals).

❒ **Jobs in Error.** A count of all print jobs that are currently in error. This number appears on the window in red, so that it can be readily noticed by anyone looking at the ChartPrint Processor or Monitor.

❒ **Processors.** Information about each ChartPrint processor that is currently running. For each running processor, it displays the processor ID (a number from 1 to 10), the type of jobs that it will print (All Jobs or Only Stat), and its status (Idle, Printing a Batch Job, Printing a Stat/Reprint Job, or Suspended). If no processors are running, no entries are displayed.

❒ **Processed this Session.** Indicates the total number of print jobs that have been processed by this ChartPrint Processor since it was most recently started. This section also provides a breakdown that describes how many of the completed jobs were stat, reprint, batch, or report generator, as well as how many print jobs did not process due to errors.

❒ **Minutes Since Last Job.** Displays the number of minutes since ChartScript has processed a job.

Closing the ChartPrint Processor

You can close the ChartPrint processor if needed; however, print jobs sent to ChartPrint will not be processed until you restart the ChartPrint processor.

♦ **To close the ChartPrint processor**

1. On the ChartPrint Print Job Processor window, select **Close**.
2. On the dialog box that appears, select **Yes** to stop the ChartPrint processor.
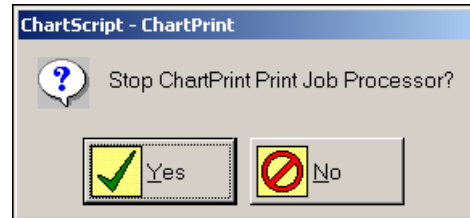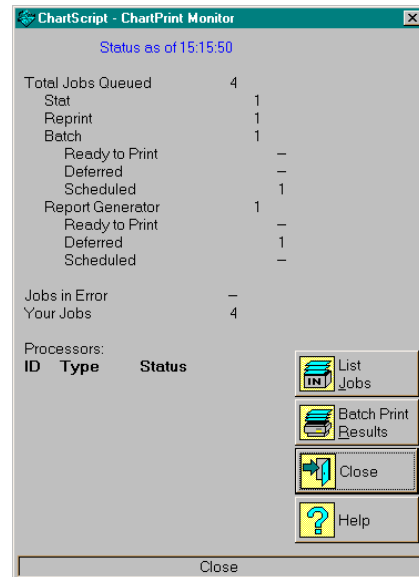
ChartPrint Monitor

ChartPrint Monitor is available in ChartScript so that users can view and manage the print jobs that they personally have submitted to ChartPrint from their own workstations. Someone in your facility should review the ChartPrint Monitor window on a regular basis to ensure that jobs are printing properly.

♦ **To start the ChartPrint monitor**

❒ On the ChartScript main window, from the **Reports** menu, select **ChartPrint Monitor**.

The ChartPrint Monitor displays totals for all ChartPrint Processors that are currently running. The information provided by ChartPrint Monitor is the same as the ChartPrint Processor, except for the Processors section. For each running processor, ChartPrint Monitor displays the processor ID (a number from 1 to 10), the type of jobs it will print (All Jobs or Only Stat), and its status (Idle, Printing a Batch Job, Printing a Stat/Reprint Job, or Suspended). If no processors are running, no entries are displayed.

At the bottom of the ChartPrint Monitor window are four buttons. The **List Jobs** and **Batch Print Results** buttons are unique to the ChartPrint Monitor window.

List Jobs

Select **List Jobs** to view information on pending print jobs. Following are descriptions of the columns on the ChartPrint Monitor – Jobs window.

❒ **Report ID.** For batch print, all documents, or report generator jobs, this column displays the name of the saved report criteria used to select the documents that are to be printed. This column is empty for stat and reprint jobs, or for "ad hoc" batch, all documents, or report generator jobs that are not based upon saved report criteria.
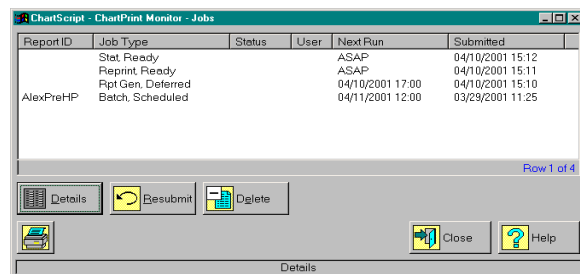
❑ **Job Type.** Lists the type of job to be processed.

❑ **Status.** Indicates which print jobs are currently being processed and whether any print jobs have stopped due to an error. If this column is empty, the job is not currently being processed by any of the ChartPrint processors, and no errors have occurred.

❑ **User.** The initials of the user who submitted the print job to the ChartPrint processor.

   Note: Print jobs without initials were submitted to the ChartPrint processor by a SoftMed employee who logged onto ChartScript using the SoftMed password. SoftMed employees who are assisting clients in setting up or testing the ChartPrint processor almost always log on using the SoftMed password.

❑ **Next Run.** Indicates the date and time that the queued job is set to print. Stat prints and reprints always say ASAP. "Ad hoc" batch, all documents, and report generator jobs also will indicate ASAP in this column. Deferred and scheduled batch, all documents, and report generator jobs indicate the date and time when the job is scheduled to run.

   Note: If all ChartPrint processors were off when scheduled jobs were due to be processed, this column shows the time that the job should have been processed. These jobs will be processed in order as soon as a ChartPrint processor is started.

❑ **Submitted.** Indicates the date and time that a job was submitted to ChartPrint or when the auto-schedule was created. The ChartPrint processor uses this information to prioritize ASAP print jobs, as well as any scheduled batch, all documents, or report generator requests that are scheduled to print at the same time. ChartPrint decides which jobs to process first based on the date and time submitted, with the oldest jobs having highest priority.

Details

You can view details about a specific print job by selecting the **Details** button on the ChartPrint Monitor – Jobs window.

The information shown on the Job Details window differs depending on the type of print job and whether an error has occurred. Typical information displayed for print jobs includes information identifying the individual document or saved report criteria, the type(s) of copies being printed, and which print rules are being used. If there is an error, the window displays information about the error, including which document was printing when the error occurred.
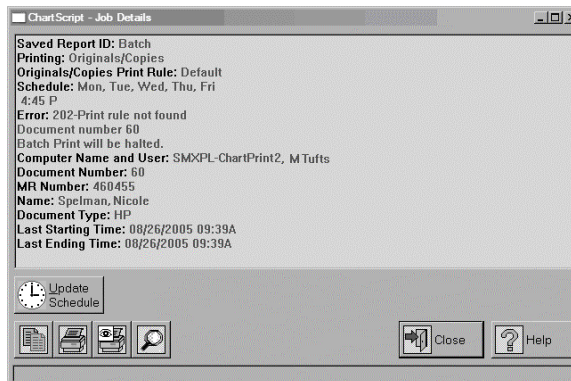
Batch Print Results

To see the results of all ChartPrint batch and all documents print jobs, on the ChartPrint Monitor window, select Batch Print Results. The window at right appears.

This window includes a title indicating the date and time that the print job was processed and the report ID used to select the documents that were printed. Because this report is generated after printing, rather than before, in addition to indicating the total number of documents that met the selection criteria and how many were not ready, this report also indicates how the documents were distributed—via printing, fax, or e-mail. Remote and UNC distribution methods are included in the Printed column.
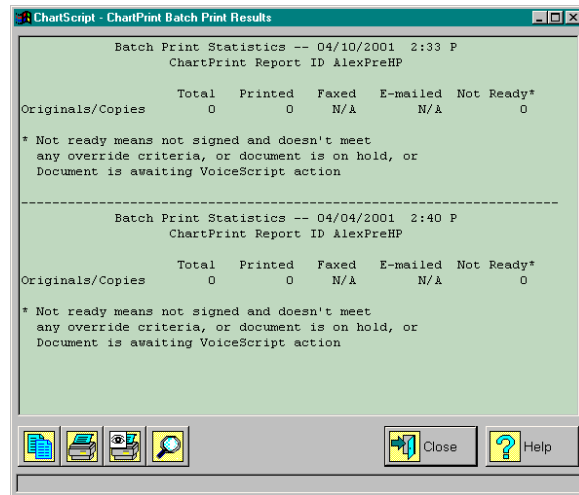
Troubleshooting Printing and Distribution Problems

See the "Printing Functions" chapter of the *ChartScript Management Guide* for further information on batch printing. See the "ChartPrint" chapter of the *ChartScript Management Guide* for further information about ChartPrint, including an error glossary. See the "ChartFax/E-Mail Server" section in the "Auxiliary Products" chapter of the *ChartScript Management Guide* for further information on carbon copy distribution via fax and e-mail, including an error glossary.

APPENDIX A	# Microsoft Windows Basics

This section provides a brief overview of the basic Microsoft Windows skills required to use a SoftMed program. For more details on using Windows, refer to *Microsoft Windows Step by Step* for your operating system, a comprehensive book and disk tutorial from Microsoft Press.

This chapter explains how to

❒ Move between a SoftMed program and other programs.

❒ Use commands in menus and toolbars.

❒ Move between fields and tabs on a SoftMed program window.

❒ Use fields on SoftMed windows to enter data.

❒ Use lists on SoftMed windows to enter data.

❒ Display ChartScript help.

For each topic, this chapter describes how to use the mouse and the keyboard to work with SoftMed programs.
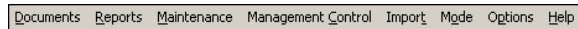
Switching Between Running Programs

In Windows, you can switch between programs that are running. You do not need to close a program to work with another program. The names of all running programs appear on taskbar buttons at the bottom of the desktop.

♦ **To switch between running programs by using the keyboard**

1. Press and hold ALT.

2. Press tab to display a window showing icons for running programs.

3. Press tab repeatedly to cycle through running programs.

4. When the name of the program that you want to switch to appears, release the keys.

♦ **To switch between running programs by using the mouse**

❒ On the taskbar, click the button for the program to which you want to switch.

Using Menu Commands

The menu bar along the top of a SoftMed window lists the names of the command menus.

When you open a menu, a list of commands appears. You can use either the mouse or the keyboard to select menu commands.
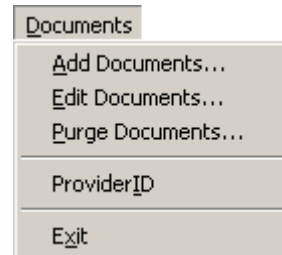
Note: Dimmed options are unavailable.

♦ **To select a menu command by using the keyboard**

1. Press ALT or F10 to make the menu bar active.
2. Press the underlined key in the menu name to open the menu.
3. Press the underlined key in the command name.

♦ **To select a menu command by using the mouse**

1. Click the menu name to open the menu.
2. Click the menu command.

Using Fields on Windows

The windows in SoftMed programs contain several types of fields for entering information and setting options. This section describes each field and explains how to use the mouse and keyboard with each field.

Typing and Editing Text

Use a box with a white background to type or edit text.
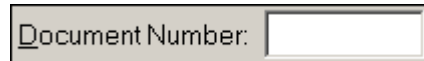
♦ **To type or edit text by using the keyboard**

1. Press tab to move to the box.
2. Type the text that you want to appear in the field.

♦ **To type or edit text by using the mouse**

1. Click the box.
2. Type the text that you want to appear in the field.

Note: Some text fields have specific formatting requirements. ChartScript checks the data entered and displays any requirements that need to be met in the status bar at the bottom of the window.

Setting Dates

In date fields, you do not need to type slashes between the month, day, and year. SoftMed inserts the slashes automatically. Also, if you type a single digit for the month (not 1) or day (not 1 or 2), SoftMed automatically inserts a zero as the first digit. For example, if you type 3702, the date appears as 03/07/2002.

Use the following shortcuts to enter and change dates in date fields.

Key	Result
t	Inserts the current date in the date field.
y	Inserts the previous day's date in the date field.
f	Inserts the first day of the current month in the date field.
e	Inserts the last day of the current month in the date field.
- (minus)	Prompts you to enter the number of days before the current date. ChartScript calculates the date and inserts it in the field.
+ (plus)	Prompts you to enter the number of days after the current date. ChartScript calculates the date and inserts it in the field.

You can use the following shortcuts to change dates in date fields.

Key	Result
p (plus)	Increases the date by one day.
m (minus)	Decreases the date by one day.

Setting Times

In time fields, it is not necessary to type the colon (:) between the hour and minute. SoftMed inserts the colon automatically. Some of the time fields are formatted to display time in A.M./P.M. format. However, you can enter the time value in this field using military time and ChartScript will convert the time to A.M./P.M.

Dictation Time: 17:42

After pressing TAB or ENTER, the dictation time above becomes

Dictation Time: 05:42 P

Selecting Check Box Options

Use a check box to turn an option on or off. You can select more than one check box in a group.

☐ Soundex

♦ **To select a check box option by using the keyboard**

1. To select, press tab to move to the check box and then press spacebar. A check mark appears in the box.
2. To clear, press spacebar again.

♦ **To select a check box option by using the mouse**

1. To select, click the box. A check mark appears in the box.
2. To clear, click the box again.

Selecting Items from a List
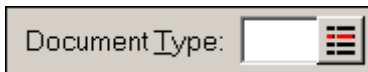
Use these fields to make a single choice from a list of options.

♦ **To select an item from a list by using the keyboard**

1. Press TAB to move to the field.
2. Press ALT and DOWN ARROW at the same time to display a list of options.
3. Press DOWN ARROW or UP ARROW to move through the list of options.
4. When the option that you want is selected, press ENTER.
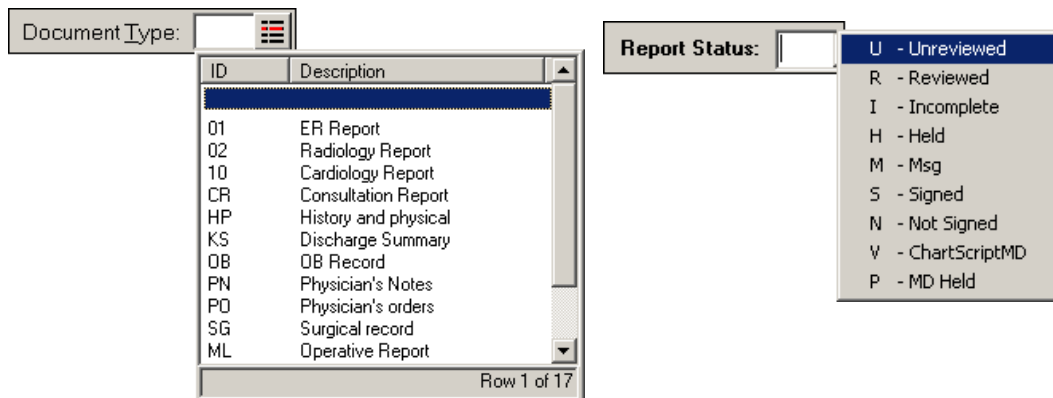
Note: If you know the keystrokes for the desired selection, type them rather than opening the list, and then press ENTER.

♦ **To select an item from a list by using the mouse**

1. Click the arrow or list button to display a list of options.
2. Click the option that you want to select.
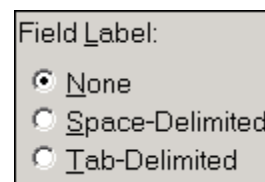
Selecting Options

Use this field to select an option from a group of options. You can select only one option in each group.

♦ **To select an option by using the keyboard**

1. To select, press the underlined letter in the option name. A dark circle appears.
2. To clear, press the underlined letter of another option name.

♦ **To select an option by using the mouse**

1. To select, click the field. A dark circle appears.
2. To clear, click another field in the group.

Selecting Providers

The provider fields in ChartScript retrieve data from the ProviderID database. You can search for a provider using the provider's name or primary identification number. When searching by primary identification number, ChartScript retrieves and enters the provider's information into the field because only one provider is assigned that identification number.

When searching by name, ChartScript may retrieve a list of providers who match the letter combination that you entered if more than one fit the criteria.

Note: To ensure a faster and easier search, type specific search criteria. For example, typing only "wa"

may retrieve several providers with last names that begin with "wa" in the Select One Provider window. However, typing "Walsh, P" retrieves fewer providers, making selection faster and easier.

♦ **To select a provider by using the keyboard**

1. Press down arrow or up arrow to move through the list.

2. When the provider you want is selected, press enter.

♦ **To select a provider by using the mouse**

1. Click the provider that you want to select.

2. Select **OK**.

Typing Numeric Identifiers

A few of the document and patient identification fields are programmed to zero fill automatically if the number does not contain as many digits as the field is set to accept.

After pressing TAB or ENTER, the medical record number above becomes:

Disabled Fields

A box with a gray background displays information that you cannot change using the current window.

ChartScript Menus and Toolbar

ChartScript Menus

Documents Menu

Use the **Documents** menu to add, edit, and purge documents.
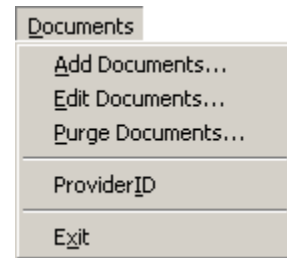
Reports Menu

Most of the reports on the **Reports** menu are for administrative work. Select the Users Documents report to view a summary of your transcription activity.
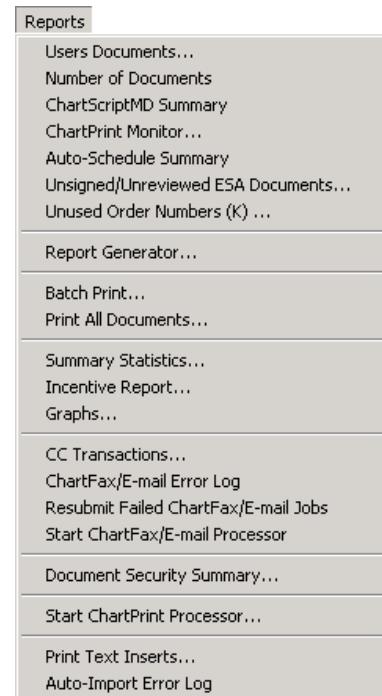
Maintenance Menu

The **Maintenance** menu enables administrators to perform a variety of maintenance tasks on the database.

Maintenance

- System Integrity Verification
- Purge Old Statistics
- Archive Old Documents
- Files Reorganization
- Refresh Independent Mode Files
- Create/Update In-House Backup/HomeScript Files
- Custom Utilities
- System Operation Status
- Display Index Slot Usage
- Display System Setup
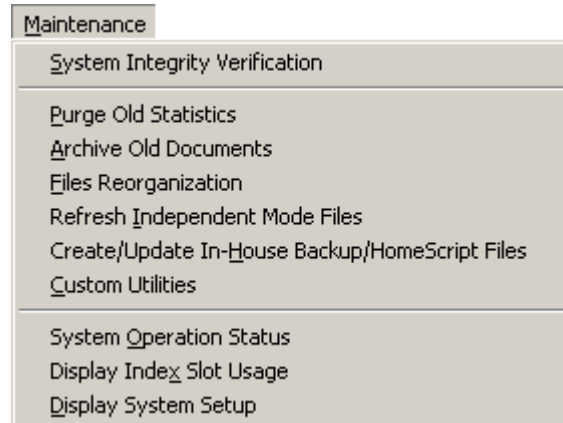
Management Control Menu

The **Management Control** menu enables administrators to set up tables, set parameters, set up incentive plans, define fields, and perform other managerial functions.

Management Control

- Tables
- Parameters
- Site-Defined Fields ▶
- Incentive Plan ▶
- Maintenance Reminders
- Utilities ▶
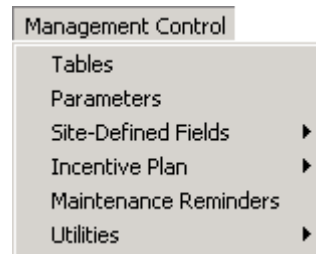
Import Menu

The **Import** menu contains functions related to document importing and patient interface records.

You will be reminded occasionally to refresh your In-House Backup files using this menu.

Import

- Automatic Document Import
- View/Purge Patient Interface Records
- Move In-House Backup Documents from Local PC to Network
- Install/Refresh In-House Backup Programs on Local PC
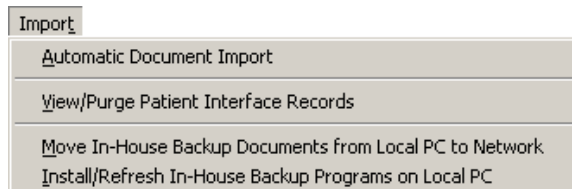
Options Menu

Use the **Options** menu commands to

- ❒ Display the Login window
- ❒ Activate ChartScript Express mode
- ❒ Define your own VoiceScript settings
- ❒ Choose a different working mode
- ❒ Create text inserts
- ❒ Customize your toolbar

Options

- Log In...   Ctrl+L
- ChartScript Express
- VoiceScript Settings...
- Mode ▶
- Text Insert Management ▶
- Toolbar ▶
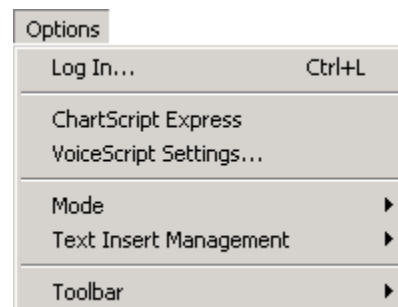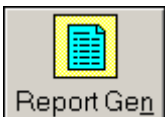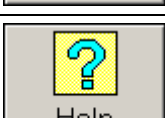
Help Menu

Use the **Help** menu to display Help for ChartScript.

Help
<u>H</u>elp Topics
ChartScript <u>L</u>ibrary
How to <u>U</u>se Help
Program Information…
About ChartScript…
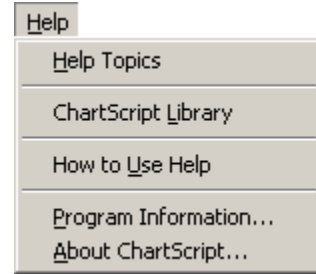
Toolbar

The table below describes the buttons on the ChartScript toolbar.

Button	Description
<u>A</u>dd	Searches for patient data to use in creating a new document.
<u>E</u>dit	Searches for existing documents that you can edit, reprint, or view document details.
Report Ge<u>n</u>	Runs a user-defined report of ChartScript data.
<u>B</u>atch Prt	Prints documents in batch mode.
<u>G</u>raphs	Displays graphical comparisons of transcription activity by transcriptionist or by document type.
Import	Imports documents to ChartScript from an outside source.
Help	Displays ChartScript Help.
E<u>x</u>it	Quits ChartScript.

APPENDIX C

SoftMed Data Sharing Process

```
┌─────────────────┐                                    ┌─────────────────┐
│  Patient is     │                                    │ Provider enters │
│ registered in   │                                    │ job information │
│ the facility's  │                                    │ into the digital│
│  host system    │                                    │   dictation     │
└─────────────────┘                                    │    system       │
                                                        └─────────────────┘

┌─────────────────┐      ┌─────────────────┐           ┌─────────────────┐
│   ChartLinc     │      │ Provider enters │           │  DDSI receives  │
│   receives      │      │job information  │           │ dictation data  │
│ patient data via│      │and dictates     │           │  via standard   │
│  standard ADT   │      │using VoiceScript│           │ DDSI interface  │
│  interface and  │      └─────────────────┘           └─────────────────┘
│   document      │
│   upload.       │                              Create or update
└─────────────────┘                              deficiency to a T

                                  ┌──────────────────┐
           ADT feed from          │ChartLinc,        │
           host system to         │Voicescript,      │  ┌─────────────────┐
           ChartScript            │and DDSI data,    │  │   ChartFact     │
                                  │as well as        │  │  deficiencies   │
                                  │VoiceScript       │  │ are updated     │
                                  │dictation, is     │  │ using CFL       │
                                  │available to      │  │  Updater        │
                                  │transcriptionist  │  └─────────────────┘
                                  │in ChartScript    │
                                  └──────────────────┘
        Upload of unreviewed
        document to host       ┌──────────────────┐       Update deficiency
        system                 │ Transcriptionist │       to an S or hold
                               │ types and saves  │
                               │ a document       │
                               │ in ChartScript   │
                               └──────────────────┘

       Upload of reviewed      ┌──────────────────┐       Update and/or
       or signed document      │ Provider(s) edit,│       remove deficiency
       to host system          │ review, and/or   │
                               │ sign documents   │
                               │ in ESA           │
                               └──────────────────┘
```

In-House Backup Document Merge Process

In-House Backup Document
(no template, body of the document only)

Document is saved in the C:\Ihbkup\Work folder on the workstation.
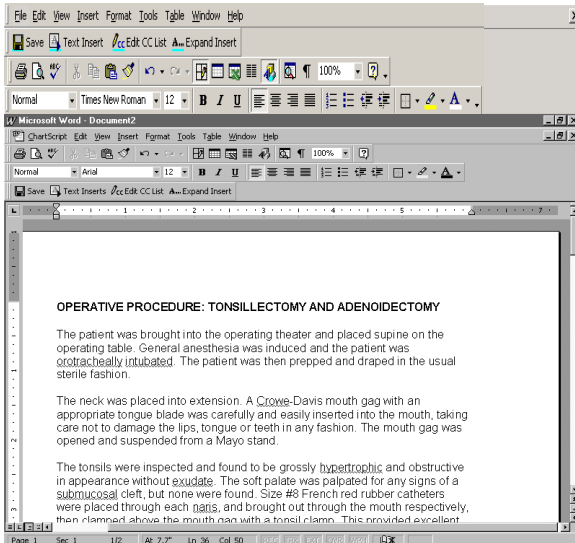
Move in-House Backup Documents from Local PC to Network

Document is moved to the \\Softmed\Script\Impauto folder on the network and is imported into ChartScript.
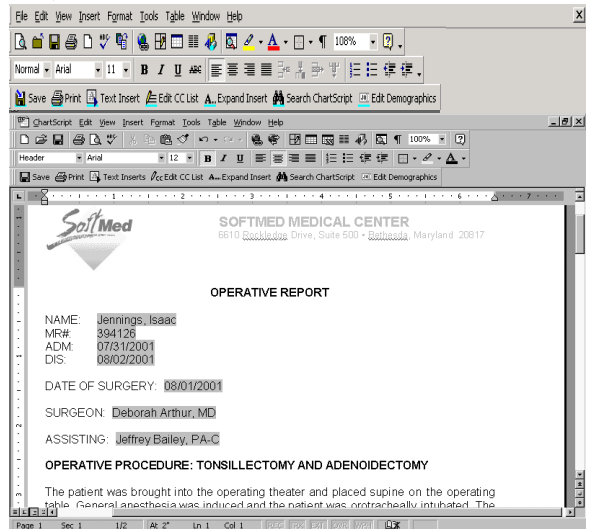
ChartScript Document
(body of the document is inserted into the format file)

Document is saved in the ChartScript database.

ChartScript Glossary

SoftMed Term	Description
SSIMenu Login	Your user ID and password that allow you access to SSIMenu and any other programs to which you are linked.
SSIMenu	Gateway to all SoftMed programs. SSIMenu stores global code for all SoftMed applications, such as field sizes and facility codes.
CUT	The Central User Table is a centralized master list of users and their access to SoftMed applications. Users have one user ID and one password to access all of the applications to which they are linked.
CDTT	The Central Document Type Table is a centralized master list of the document types available in SoftMed. The central document ID in the CDTT is linked to the document type table in each program to create an integrated solution.
INTERFACES	
ChartLinc	SoftMed patient interface that translates and transfers patient Admission/Discharge/Transfer information from the mainframe to SoftMed products, such as ChartScript and ChartFact.
DDSI	SoftMed Digital Dictation System Interface that transfers dictation information from a facility's dictation system to ChartScript. DDSI also updates ChartFact dictation deficiencies.
AUXILIARY PRODUCTS	
ChartFax SE/EE	A SoftMed product that allows clients to fax or e-mail physician carbon copies or fax ChartFact letters.
ESA	Electronic Signature Authentication. Providers use ESA to view, edit, and sign documents using a computer.
OTHER SOFTMED PRODUCTS	
ChartFact	Deficiency tracking software. ChartFact deficiencies are updated by other SoftMed products, such as DDSI (physician dictation), ChartScript (transcription), or ESA (electronic signature authentication).
ProviderID	Provider database that stores each provider's profile.

SoftMed Term	Description
ChartID	Master patient index (MPI) program or a backup MPI of the facility's mainframe system.
CHARTSCRIPT TERMS	
Script Login	First-time only login to link a user's ChartScript user ID to his or her SSIMenu user ID.
Stat Print	Immediately after the document is typed, the user selects an option from a menu to direct how and where the document prints. This type of printing is generally used for documents that are needed immediately at various locations.
Batch Print	Documents are saved and then printed together all at one time in a batch, based on criteria that you specify.
Reprint	A transcribed document is printed on demand in Edit mode.
CCs – Provider Copy	This copy is printed for each provider added via the ChartScript CC function. The name of each provider prints at the bottom of each copy.
Extra copy	An additional copy that is neither the original/chart copy nor the physician/carbon copy. Extra copies are typically special requests or for a department's records.
Print Rules	A set of instructions that tells ChartScript how and where to print a document. When doing immediate print jobs, such as stat printing and reprinting, transcriptionists must select a print rule before the document can be printed. Batch printing can be set up with the print rule already selected for each batch. Therefore, it is a seamless process for the transcriptionist.
Document Upload	The Document Upload interface is an optional feature in ChartScript that enables a facility to send transcribed documents to an online data repository.

VoiceScript Settings

If your facility uses VoiceScript, you can define your own VoiceScript settings without assistance from a supervisor.

♦ **To define VoiceScript dictation playback settings**

1. From the **Options** menu in ChartScript, select **VoiceScript Settings**.

2. On the VoiceScript Settings window, specify your settings.
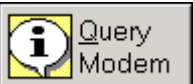
The User and workstation settings are defined as follows:

❒ **Prompt Level.** Select **Verbose** or **Brief** for a long or short version of the same prompt, respectively. If you are new to VoiceScript, you may prefer verbose prompts until you become more familiar with the product. On the other hand, more experienced transcriptionists or those who handle a high volume of dictation records may prefer shorter prompts, which enable them to proceed more quickly through the transcription process. For a list of these prompts, see the Appendix of the *VoiceScript Management Guide*.

❒ **Welcome Prompt.** Select this check box if you want to hear a standard welcome prompt after logging on to VoiceScript.

❒ **Speed Increment.** Select a number from 1 to 5 to indicate the degree of increase (or decrease) for the prompt play speed based on a normal speed of 0.

❒ **Volume Default.** Select a number from –5 to 5 to set your default prompt volume level based on a normal volume level of 0.

❒ **Volume Increment.** Select a number from 1 to 5 to indicate the degree to which the volume will increase each time you press the volume key.

❒ **Rewind Distance.** Select a number from 1 to 60 to indicate how far back the system will rewind, in seconds, each time you elect to rewind.

❒ **Forward Distance.** Select a number from 1 to 60 to indicate how far ahead the system will fast-forward, in seconds, each time you elect to fast forward.
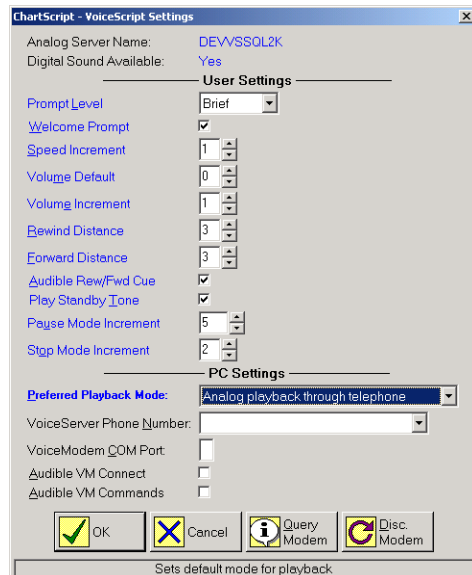
❑ **Audible Rew/Fwd Cue.** Select this check box if you want to hear a sound indicative of rewinding or fast forwarding.

❑ **Play Standby Tone.** Select this check box to produce a beep during a pause in recording.

❑ **Pause Mode Increment.** Select a number to indicate at what interval the playing of the standby tone will occur in seconds.

❑ **Stop Mode Increment.** Select a number from 1 to 60 to indicate the number of seconds of dictation time that the system rewinds when dictation playback is stopped. This setting ensures that you resume transcription in the correct part of the dictation.

❑ **Preferred Playback Mode.** Select your dictation playback preference. Select **Prompt (always ask)** to be prompted for playback preference after selecting **VoiceScript** on the Search for and Add Documents window. Select any of the remaining options, **Digital playback through ChartScript**, **Analog playback through VoiceModem**, **Analog playback through ChartScript**, or **Analog playback through telephone**, to bypass a selection prompt and make the selected option the default.

❑ **VoiceServer Phone Number.** Select the phone number that you must dial to access the Voice Server, if using a Voice modem. These numbers are entered and maintained in the Administrator.

❑ **VoiceModem COM Port.** The port on which the Voice Modem is installed.

❑ **Audible VM Connect.** Select this check box to hear the Voice modem connection process.

❑ **Audible VM Commands.** Select this check box to hear commands sent after voice modem connection.

The table below describes the buttons on the VoiceScript Settings window.

Button	Description
✓ OK	Closes the window, saving any changes that you have made.
✗ Cancel	Closes the window without saving changes.
ⓘ Query Modem	Select this button to query the voice modem for configuration information. A message appears indicating whether essential files are missing.
↻ Disc. Modem	Select this button to reset your voice modem connection after an inactivity timeout or phone line problem. Selecting this button prevents you from having to exit and re-enter ChartScript to clear the connection.

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Notes