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Instructions for Using Intrascript Transcription Platform

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Instructions on how to set up and use Intrascript.

A Guideline for Migrating to Intrasript

Migrating to a new platform can be a daunting task, but with some planning and forthought you might be suprised at how simple it can be.

A guideline for migrating

The following is a simple outline to give you an idea of how we can help organize and simplify the migration to Intrascript in a way that will minimize the disruption to both you and your clients.

1) Prioritize your clients in order of complexity and importance
2) Gather pertinent information about each client using our New Client Setup Form
3) Read through the Training section on www.transcriptiondigital.com
4) If using Iscriptor, have MT's download and run the latest version of Iscriptorloaderinstaller from ftp.intrascript.com.
5) Schedule training for Administrators, Editors and MT's
6) Administrators: work with Intrascript to set up first client on website
    a. Create Users
    b. MT's
    c. Affiliate
    d. Doctors
    e. Assistants
    f. Set up report types and format templates
    g. Test report types

7) Schedule installation in clinic
8) Install Iclient (dictation capture) and Intrascript (print program) on appropriate PC's in clinic
9) Train doctors and assistants
10) Test all applications prior to going live

Instructions for Administrators

Instructions for initial software setup

Setting up Software

Adjust Browser Security Settings
1) Put a shortcut for your website on your desktop by right clicking on your webpage (before you login) and select create shortcut from the dialogue box.
2) In Internet Explorer add your website to trusted sites and customize security by going to Tools, Internet Options, Security, Trusted Sites. Add your website URL, then click OK.
3) Make sure the security setting for trusted sites is set to low (the default for all trusted sites).
4) Disable pop−up blocking.

Install Instrascript (printing) Software on Printing PC's
Go to your login page and click on the blue Instrascript download icon at the bottom left of the page. Follow the steps to run the software. Some computers might require .Net Framework 1.1 to be installed. If in the installation process you get a message about installing .Net, you will be re−directed to the Microsoft website where you can install .Net Framework 1.1 redistributable. This is a large file and might take several minutes to install. Once Intrascript is installed you will need to reboot your computer.

Set Up Your Organization

Setup users and organize your work flow

Administrative Overview

The Intrascript platform is designed to eliminate cumbersome, manual and repetitive tasks and to track all activities so that transcription companies can reduce overhead and increase productivity. Because every activity is logged and tracked data can be mined and used to create valuable business and productivity analyses which aid in the management of the company. The ultimate result is a reduction in non−productive administrative tasks and an increase in transcription capabilities, which should result in higher profitability.

The platform uses secure, HIPAA compliant protocols to retrieve, store and distribute dictations and transcriptions via secure internet portals.

There are eight levels of access to the platform:

Administrator −The Administrator login has the highest level of access which includes the ability to set up users (transcriptionists, editors, assistants, nurses, etc.), assign files to transcriptionists, view all reports, administer accounting reports, A/R and A/P, and view and manage all users.

Physician − The physician login has access to upload voice files, view, print and electronically sign his or her own reports and update files.

Transcriptionist − The Transcriptionist login has access to download voice files, write transcriptions, and view reports pertaining to his or her work.

Editor − The Editor login has access to edit transcribed files, view reports pertaining to his or her work, and add comments about documents.

Assistant − The Assistant login has access to view and print files and reports of physicians to whom the assistant is assigned.

Nurse − The Nurse login has access to view the list of files transcribed for the physician to whom the nurse is assigned.

Hospital Administrator − The Hospital Administrator login has access to view physician files and reports for physicians in their affiliation. The Hospital Administrator also has access to management reports and auditing capabilities.

Coder − The Coder login has access to add codes to files belonging to physicians within their affiliate.

Set Up Your Company Options

1) Login to your site using your login and password.
2) Set up your company options by going to *Menu*, *Manage Company Profile.*

This is where you can set global options for the entire organization.

Create Affiliates

1) Set up each affiliate by clicking on *Administration* in the upper menu, then select *Manage Affiliates.*
2) Select *Add Affiliate.*
3) Complete the form. The Dept. # is required for telephone dictation. Ask your support representative for your

Department number.
4) Select signature blocks and electronic signature options on this page.
5) Select *Billing Options*, then select the appropriate options for this affiliate and Update.
6) Select *Manage Report Type Interface*. This is where you assign the different types of reports required by the affiliate and the doctor. On this page you can select the hospital codes, assign priorities and select signature blocks for each report type. Update.
7) Select *Select MT Fields.* These are the text fields that appear on the MT Header Page when transcribing. The data in these fields will automatically be filled in templates and are searchable fields. MT Fields must coincide with template fields if using templates.

Add Doctors and Assistants

1) Go the *Main Menu* and select *Create New User.*
2) Select Physician from the drop down list.
3) Complete the form.
4) Click on *Add and Edit User*.
5) Complete this form as well. The Dicatation Id is the Id for telephone dictation while Handheld Id is the Id on the handheld recorder.
6) Select the primary affiliate from the drop down box (the primary affiliate must already be set up).
7) *Assign Transcriptionists* and any additional affiliates.
8) Select *Update*.
9) Add assistants using the same instructions as above. Be sure assistants are assigned to at least one affiliate and one doctor.

To load multiple physicians at one time go to the *Main Menu* and select *Multiple Physician Upload* in the Administration section and follow the directions.

Add Transcriptionists

1) Set up Transcriptionists by going to *Menu*, *Create New User* and select *Transcriptionist* from the drop down box.
2) Complete the form and then click on *Add and Edit User.*
3) Assign the appropriate options.
4) Select *Default Payment Options* to set payment parameters.
5) Select *Payment Options Per Affiliate/Physician* if payment rates are different for different affiliates or physicians.
6) *Assign Physicians and Affiliates* to route voice files to MT.
7) Click on *Assign Report Types* to select report types your affiliate and doctors require.
8) Click on *Update* to save the profile.

Setting Up a Hospital or Clinic

There are three basic parts to setting up a clinic or hospital:
1) setting up the affiliate, doctors and assistants on your company's new login page.
2) installing and setting up the printing software (Intrascript) on your clients' computers.
3) installing and setting up DSS Player and Iclient for capturing and transferring voice files.

Adjust Browser Security

1) In Internet Explorer add your website to trusted sites and customize security by going to *Tools, Internet Options, Security, Trusted Sites.* Add your website URL, then click *OK.* Make sure the security level is set to *Low.*
2) Put a shortcut for your website on their desktop by right clicking on your webpage (before you login) and select *Create Shortcut* from the dialogue box.
4) Disable popup blocking.

Download Intrascript Printing Software

1) If at all possible we recommend you have someone in the doctors office download and install both programs from your website prior to an office visit for setup and installation. Any computers that will be used for dictation or transcrioption should be updated through Windows Update.
2) Go to your login page and click on the blue *Instrascript* download icon at the bottom left of the page.
3) Put a shortcut for your website on their desktop by right clicking on the webpage (before you login).

Install DSS Player

1) Insert DSS Player cd and follow directions for installing.
2) Open DSS Player.
3) On the main menu select *Tools, Options.* Under *Download*, check *After downloading a file, delete original file*. Then check *After detecting the device, download all data.*
4) Click the *Communication* tab and check *Auto adjust Date and Time When Connecting to Recorder*.
5) Ideally each recorder has a unique ID that associates voice files with each doctor, or affiliate. To set the ID make sure the cradle is plugged into the USB port of the PC.
6) Cradle the Olympus recorder.
7) Start DSS Player and select *Download* from the main menu, then select *Transfer ID*. Type in the handheld id.
8) Install and run Iclient from your website and setup local users.
9) Create default template in batch print (Intrascript).

Intalling Voice Capture Software (Icient)

IClient is the software that scans your computer for voice files from digital recorders and it must be open and running on any PC that will be uploading voice files. It can be configured to detect the dictator based on the recorder id (set within the DSS program), or it can be configured to recognize the dictator based on a login and password collected on the resident PC (in the IClient program). Smart Mode uses the recorder id to associate voice files with the dictating physician so there is no login requirement to upload dictations. Upon docking the recorder in its cradle voice files are automatically swept from the recorder and associated with the appropriate physician then routed to the assigned MT for transcription.

Download IClient (it might ask you to load .NET Framework 1.1 from Microsoft prior to installing IClient. Follow the directions to install .Net Framework 1.1 redistributable before trying to do anything further) by opening your website and clicking on the Intrascript icon at the bottom of the login page. Installing the software will put an I−Client icon on the desktop.

Setup and Using Iclient

Using Iclient
There are typically two users of Iclient: the doctor and/or the doctor's assistant. An assistant has the ability to manage different affiliates and can choose whether or not voice capture requires a recorder id or not. An assistant login allows multiple users to download voice files. Owners of voice files are recognized by the recorder Id or by doctor login. Voice files uploaded while logged in as a doctor will force all voice files to be assigned to the logged in user.

Setting Up Iclient
1) To begin using I−Client double click on the IClient icon and select *Manage Accounts* (Lower Left button).
2) Select *New* button on next screen to add a new account.
3) Enter the email address exactly as it is used and appears in the TDS User Account Information. Also, click *Set Password* and enter the same password used for logging into your website.
4) Enter your website name in the Intrascript Server field. It must be the EXACT name of your URL. For Example: transcriptiondigital.com. Do not include www unless that is how you log into your website.
5) *Operating Mode* is always set to *Client.*
6) To set *Upoads* click on or highlight the line under the *Type* heading for Voice.
7) Select *Edit* button. This will point the software to the correct files where dictations are stored.
8) Click *Browse* and go to your digital recorder folder. For Olympus DSS it is typically C:\Documents and Settings\All Users\Documents\DSSPlayer\Messages.
9) Check the *Active* box. It will appear after you have set the file path in step 6.
10) Check *Automatically upload files when IClient starts.*
11) Check *Purge files on upload?* (Select days from 3−10, recommended). This instructs the program to delete files on the resident PC after a set period of time (files are NOT deleted from the server).
12) Click *Save and Close.*

Uploading Voice Files
1) Double click on the Iclient icon on your desktop and enter your user ID and password.
2) The status screen should be running in the background on your computer so files will upload whenever a recorder is docked. History, logs and setup are available from this screen.
3) If logged in as an assistant, the affiliate and doctor can be changed by clicking on the lower right names.
4) When dictations are complete simply place the recorder in the docking cradle attached to your PC.
5) A dialogue box will pop up and ask you if you want to *"Download from the detected device?"* Click *OK* and all voice files on the recorder will be removed and downloaded onto your PC into the DSS Player Folders. Voice files will reside there until they are swept and uploaded to the server by Iclient.