



Unleash the PotentialSM

Top Transcription ASP



Guide for Administrators

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Introduction

About This Document

Welcome to InfraWare!

Scope of the Document

This guide will assist you with implementing the InfraWare platform within your organization. It contains an extensive set of white papers detailing the features of the InfraWare Management Console (IMC).

This guide is geared specifically towards administrators who will need to manage the deployment of the InfraWare platform and who later will need to manage the workflow of dictation jobs.

Want More Information?

For getting started with the software quickly, be sure to read the Administrators' Quick Start Guide and Training Tutorials, two other booklets included in the Welcome Kit.

In addition, the online Knowledge Base is a fully searchable set of answers to technical questions. The Knowledge Base is accessible from any of the InfraWare applications— the InfraWare Dictation Client (IDC), the InfraWare Transcription Client (ITC), and the InfraWare Management Console (IMC) – as well as the public website at infraware.com.

Implementation Guide

Planning Instructions

Overview

Follow these instructions to prepare your Implementation Plan. Use the provided Plan Template and the Sample Implementation Plan as references.

Phase I: Gather Information

Gather information to get started. Note everything that needs to be collected, and break the process into steps.

Complete the New Customer Implementation Survey (found in this Welcome Kit). Clearly identify the features you intend to use, and briefly note any criteria that might be relevant to your unique circumstances (file formats, IP addresses, etc.) Upon completion, send a copy of the Survey to your assigned InfraWare Customer Support Representative (CSR).

Phase II: Basic Decisions/Actions

Confirm choices for features, and begin setup tasks.

An early task is to prepare the platform with your information. This includes entering key data, such as Users and Document Types. If you have a large amount of such data, you can begin with just the info needed for the Pilot launch. As an alternative, some of the most basic data can be imported from a flat text file to save time if you have a large user base. (See Appendix B for import file criteria.)

Templates will need to be imported or recreated using the InfraWare Template Editor (ITE). The ITE supports dynamic fields for ADT patient demographics, job information and eSignature.

Choose the methods and times for training users. When well planned, end-user training is the area in which InfraWare can provide the most direct assistance. The most common and cost-effective method of training is web-based.

Planning Instructions (continued)

Phase II: Basic Decisions/Actions

A knowledgeable InfraWare associate conducts a 60 minute session that can be viewed by your users in their web browser. The cost is minimal compared to traveling, and a large group of users in various locations can be addressed at one time. On-site training is available at a higher cost. To be sure your preferred times can be accommodated, please discuss this schedule with your InfraWare CSR early in the planning process.

Phase III: Communicate with Stakeholders

Stakeholders include everyone who has a vested interest in the outcome of your business process, especially employees and customers. Effective, timely communication with stakeholders can promote positive expectations and yield favorable outcomes.

Scheduling and Timelines

By adopting a realistic schedule that meets your objectives, you can ensure that your business can continue without interruption and that users will know what to expect. These timelines will be built into the other portions of the plan. It can be helpful to organize the timeline in the form of a Gantt chart that clearly identifies the sequence of major tasks.

Preparing Supervisor and MT Users

This group of users stands to experience a dramatic impact to the way they work. As part of both the pilot and the full roll-out, it is important to prepare the users involved. Such preparation will promote favorable experiences. This portion of your plan should include:

- Letters or emails clearly explaining the planned changes and the benefits to users (samples provided by InfraWare in Appendix D)
 - Schedule and provide training (knowledge will reduce concerns)
 - Consistent messages that set expectations
 - A safety net for any users who fall behind the curve (additional communication and training)
-

Planning Instructions (continued)

Phase III: Communicate with Stakeholders (continued)

First, choose a special implementation test group to be a limited first set of users to try the system in your pilot launch. The primary qualification for members of this group would be people who are likely to succeed. You will use what you learn from this group's experience to promote the success of implementation with your other stakeholders.

Preparing Customer Facilities

While the platform has been designed to have a minimal effect on authors, some preparation is in order. Staff in the medical records department, for example, need to be aware that you are going through a change in systems and especially the benefits you hope to provide to them. As with internal users, this part of the plan will include:

- Letters or emails clearly explaining the planned changes and the benefits to them (samples provided by InfraWare in Appendix D)
- Schedule and provide training (knowledge will reduce concerns)
- Consistent messages that set expectations
- A safety net for any users who fall behind the curve

Phase IV: Pilot Roll-out

For all but the very smallest MTSOs, a pilot roll-out of the platform will have a dramatic effect on your success. In considering the Authors, Supervisors and MTs to involve in the pilot, select people who will adapt easily and will naturally contribute to success.

These participants will help drive success during the pilot, and they will serve as advocates and coaches during the full roll-out. By working with a small group of highly motivated people, you can easily respond to unexpected outcomes and develop work-around solutions prior to impacting the entire organization.

Select a date to re-task users. In the time leading up to this date, ensure that all pilot users are prepared and conditions are right. Communicate frequently with pilot users so they are a part of the process.

Planning Instructions (continued)

Phase IV: Pilot Roll-out (continued)

Prepare a mechanism to document all feedback (both positive and negative) once the pilot has begun. Prepare a back-out plan in case significant problems arise which cannot be addressed internally or with InfraWare's help without significant impact to production. If at all possible, stay on the platform as problems are solved.

Phase V: Full Roll-out

Plan to repeat the steps involved in preparing for and executing the pilot roll-out, except:

- Cover either your entire footprint of users, or the largest footprint you feel comfortable addressing.
 - Use what you learned during the pilot to eliminate wrinkles for this roll-out.
 - Consider using your pilot participants as mentor resources for participants in this roll-out.
-

New Customer Implementation Survey

Overview

By answering the questions in this survey, you will become well prepared to complete your Implementation Plan and ultimately execute a successful roll-out of the InfraWare 360 Platform. Time invested in this process will yield dividends as you move forward through implementation. If you have any questions, please don't hesitate to contact InfraWare. An electronic copy of these documents can be found on the CD that was sent as part of your Welcome Kit package. Instructions to transmit this completed form are at the end.

Client Identification

Please complete your organization's information:

Organization:	
Administrative Contact:	
Email Address:	
Direct Telephone # or Extension:	
Fax:	
Street Address:	
City:	
State/ Zip:	

Platform Feature Identification

Select the platform features you intend to use when this roll-out is complete by checking applicable boxes. Where appropriate, include configuration requirements:

New Customer Implementation Survey (continued)

Platform Feature Identification (continued)

Administration

- Substitute own logo on IMC website (replace InfraWare logo)
- Utilize Billing Models to generate Billing Reports for customers

Dictation

For our pilot implementation, we intend to submit dictation to the InfraWare platform by:

- InfraWare Telephone Dictation System (TDS)
- PC Microphone Dictation using the IDC
- Handheld Personal Digital Recorder s(PDR) using the IDC

Specify models: _____

 Note: For compatibility, USB Handhelds must create a drive letter in My Computer. WAV and DSS files supported.

- Automated Secure ftp (sftp) from our own dictation system
 What system? (DVI, Lanier, Dictaphone, etc.):

 What are the file format & specs? Format (WAV, DSS, etc. Specs: 8bit/8k, 16bit/8k, etc):

 Is a paired text file available with each audio file?

Server info

SFTP Server Program	
Server IP address	
Folder	
InfraWare's username	
Password	
After retrieval IW should	<input type="checkbox"/> Delete <input type="checkbox"/> Move to a folder

New Customer Implementation Survey (continued)

Platform Feature Identification (continued)

Back-end Processing

Select the processing services to be used:

- First Draft back-end speech recognition (SRT) service
 - Normals (Standards) substitution
 - Document Templates
 - Global Documents (for appt lists, etc.)
-

Transcription Workflow Queuing

How will jobs be queued for MT download?

- FIFO (first-in, first-out)
- TAT (turn-around time remaining)

- MT Masks overriding FIFO or TAT

Document Delivery

How will documents be delivered from InfraWare?

- EHR Web Portal (download and/or printing)

 - Document Delivery System (DDS) options:
 - Secure FTP
 - File transfer to UNC path over VPN
 - Fax
 - Remote Printing
-

*Please copy the Survey and send to InfraWare via email or fax
support@infraware.com – or- 812-235-5544 (fax)*

Sample Implementation Plan

For **Speak to Type** (a fictional transcription service company)

An electronic copy of these forms can be found on the CD that was sent as part of your hard copy Welcome Kit package.

Responsibility

Phase I	<u>Gather Information</u>	<u>Cust</u>	<u>IW</u>	<u>Person</u>
Step 1:	Complete the New Customer Implementation Survey to identify: <ul style="list-style-type: none"> • Client Information • Planned Features, including: <ul style="list-style-type: none"> • Dictation, Back-end processing, • Workflow and Delivery • First Draft Recognition • Document Delivery 	✓		
Step 2:	Build list of Users (with Roles), Facilities, Document Types with optional ID numbers (See sample Excel sheet)	✓		
Step 3:	Define various billing scenarios (rates/line, line definitions, extras and exceptions)	✓		
Step 4:	Obtain logo image in proper file format			
Step 5:	Receive Survey feedback from InfraWare		✓	

Sample Implementation Plan (continued)

For Speak to Type (fictional demo company)

Responsibility

Phase II	<u>Basic Decisions/Actions</u>	<u>Cust</u>	<u>IW</u>	<u>Person</u>
Step 1:	Define Pilot Scope Identify persons (MTs, Authors, Supervisors) who will promote success. Select a cross-section of job types with these workers.	✓		
Step 2:	Upload logo to replace the default InfraWare logo (Optional) (See Appendix A for instructions)	✓		
Step 3:	Entry of Initial Data Either enter user data in IMC or import from Excel (See Appendix B for Import information)	✓		
Step 4:	Prepare Templates with InfraWare Template Editor (ITE).	✓		
Step 5:	Configure features with data (Settings that will let jobs flow as planned). Tie Document Types to Templates, basic default workflows (QA, eSign-off permissions)	✓		
Step 6:	Choose Training methods, dates and times Select and list Users for initial training: <ul style="list-style-type: none"> • Admins & Transcription Managers • MTs • Authors and/or their staff • Executives (Facility records staff) 	✓		

Sample Implementation Plan (continued)

For Speak to Type (fictional demo company)

Responsibility

Phase III	<u>Communicate with Stakeholders</u>	<u>Cust</u>	<u>IW</u>	<u>Person</u>
Step 1:	Message to MTs and Supervisors (Samples provided in Appendix D) <ul style="list-style-type: none"> • Cover key positive message points • Schedule online, live training • Include license information, username and password 	✓		
Step 2:	Message to Customer segments	✓		
Step 3:	Perform End-user Training as scheduled with InfraWare and Users Demonstrate/present to - <ul style="list-style-type: none"> • Admins and managers • MTs • Authors and/or their staff • Executives (Facility records staff) • Software installation demo 	✓	✓	
Step 4	Second End-user communication Must include License Info, username and pwd Additional resources	✓		
Step 5	Identify End-user concerns. Collaborate with InfraWare to resolve.	✓	✓	

Sample Implementation Plan (continued)

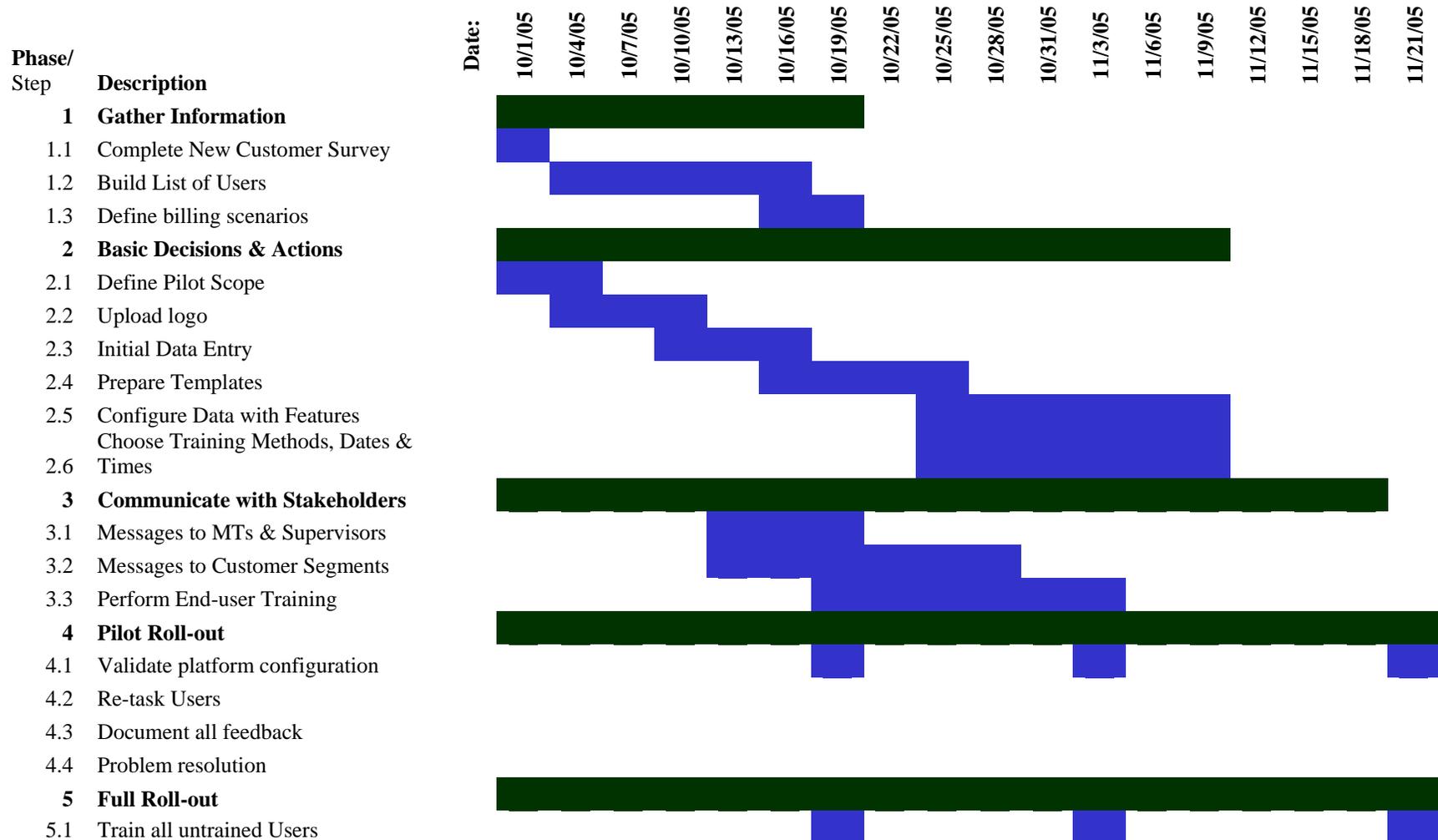
For Speak to Type (fictional demo company)

Responsibility

Phase IV	<u>Pilot Roll-out</u>	<u>Cust</u>	<u>IW</u>	<u>Person</u>
Step 1:	Validate platform configuration, document types, pools, permissions and workflow. Take user feedback and additional experience into consideration	✓		
Step 2:	Re-task Users Begin with Authors if their process will change. Provide intense oversight to ensure each job flows as planned	✓		
Step 3:	Document all feedback from users (positive and negative) and review with InfraWare.	✓		
Step 4:	Implement changes based on learning from pilot experience	✓		

Phase V	<u>Full Roll-out</u>			
Step 1:	Repeat Pilot steps to launch to entire organization with established mentors from knowledgeable Pilot Users	✓		

Sample Implementation Timeline



An electronic copy of this form can be found on the CD that was sent as part of your Welcome Kit package.

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White Papers

Document Types

Summary

The InfraWare transcription service platform supports a Document Type feature to streamline the transcription of dictated documents.

This document introduces the related features of the platform and provides insight into effective strategies to accomplish organizational goals.

Audience: Readers should have a fundamental understanding of the InfraWare platform.

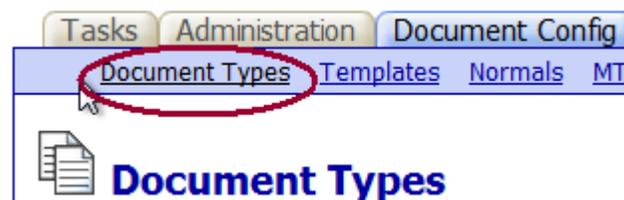
Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

Document Types represent collections of configuration parameters which help save time by accelerating document production based on common document characteristics. By defining a set of characteristics and assigning them a name/number, participants can reference that Type and benefit from the established parameters throughout the workflow.

Feature Access

This platform feature is managed in the InfraWare Management Console (IMC) under the Document Configuration area. It can be viewed by users with administrator and manager roles. In addition, the InfraWare Transcription Client (ITC) supports related features for the transcriptionist.



Document Types (continued)

Database Storage and Access

A fundamental strategy of InfraWare's implementation of Document Types is that they are stored in the platform database. Since various parameters of the Document Type apply to different parts of the workflow, the platform can influence the workflow steps and provide relevant information along the way based on the Document Type selection at the time of dictation.

Document Categories

Document Categories are organizational containers for Document Types similar to folders. Customers can create as many Document Categories as they wish, and they can create many Document Types in each Category. This is helpful to keep the list small for various workgroups. For example, a hospital ER might have a Category known as ER Document Types. That group of physicians would have ER Document Types as their default category, and anytime a physician browsed the list of Document Types, they would be in that context – rather than browsing all Document Types for the facility.

Parameters

The following parameters comprise the definition of a Document Type:

- Document Type ID (an integer used for telephone dictation)
 - Dictionary and Focus (Speech Recognition)
 - Quality Assurance (QA) Requirement
 - Priority
 - Templates
-

Document Types (continued)

Dictionary and Focus for First Draft (Speech Recognition)

Document Types can contribute to the accuracy of speech recognition (called the generation of a First Draft in the InfraWare platform). When creating a Document Type, the administrator chooses a Dictionary, which is usually Medical (or alternatively Legal or General Business). In addition, they can select one or more Focuses. Focuses are specialty areas, such as Cardiology or Sports Medicine. (InfraWare has approximately 35 such Focuses.) The purpose of the Dictionary and Focus selections is to improve speech recognition accuracy by identifying the set of words that are likely to be used in such a document. By specifying the Document Type, the platform tunes speech recognition to generate more accurate First Drafts.

These same Dictionary and Focus settings can be applied to the Author configuration as well. Settings tell the speech recognition service whether to use parameters from the Author or the Document Type.

Quality Assurance (QA) Requirement

Quality Assurance is an optional workflow step in the InfraWare platform. In addition to manually marking a job for QA, a number of optional parameters can be set to automatically trigger the step. One such option would be if a Document Type is checked in the IMC to “Require QA by default”, then any dictation that is coded as that Document Type will automatically qualify for the QA step. For information regarding other triggers for QA as well as other workflow routing logic, please see the white paper, *Solution Implementations – Management and Administration*.

Priority

The InfraWare platform routes dictations through back-end processing (such as speech recognition) and to MTs for transcription on a FIFO (first-in, first-out) basis, subject to Priority and turn-around time (TAT) commitment. In other words, in general, jobs get routed in the order they were received. However, a recently submitted High Priority job will get processed ahead of an older and lower Priority job. The Priority parameter of the Document Type feature provides a mechanism to specify a Priority for any dictation submitted as that Document Type.

Document Types (continued)

Templates

Association of templates is a fundamental feature of Document Types. Any Document Type defined in the platform can be associated with a specific template for the ITC Editor. After assigning a template to a Document Type, an MT will always receive a copy of that template each time she retrieves a job for transcription of the Document Type. For detailed information about the implementation of templates, please see the white paper, *InfraWare Implementation of Document Templates*.

Dictation

Authors can conveniently specify a Document Type with each dictation. Doing so establishes many parameters for the downstream workflow.

Telephone Dictation System (TDS) – When dictation is submitted via telephone, the author is prompted to enter a numeric Document Type ID. This is assigned in the IMC at the time the Document Type is created.

InfraWare Dictation Client (IDC) – When dictating via the PC or any other method that submits dictation via the IDC (including personal digital recorders) the author or clerical support staff can specify the Document Type by selecting from a drop-down list. Both the Category and Document Type can be set to defaults in the IDC for end-user convenience.

Document Templates

Summary

The InfraWare transcription service platform supports a flexible implementation for incorporating document templates into the transcription process.

This document introduces the related features of the platform and provides insight into effective strategies to accomplish organizational goals.

Audience: Readers should have a fundamental understanding of the InfraWare platform.

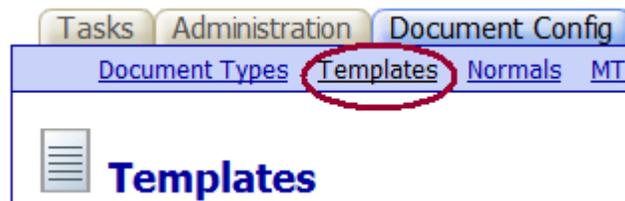
Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

Document Templates help save time and ensure proper formatting for transcribed documents. Creating and managing such Templates represent a significant challenge, and the InfraWare platform has been designed to extend the value of templates while minimizing the effort required to manage them.

Feature Access

This platform feature is managed by the InfraWare Template Editor (ITE). Templates are also managed in the InfraWare Management Console (IMC) under the Document Configuration area. This tab can be viewed by users with administrator and manager roles. In addition, the InfraWare Transcription Client (ITC) supports related features for the transcriptionist.



Document Templates (continued)

Version Support

The platform supports templates produced by InfraWare Template Editor (ITE) v2006 available for download and installation from the Software tab of the IMC.

Template Design

The design of templates can contribute a great deal to the efficiency of using them throughout the workflow. The proper use of the template bookmarks in RTF templates can ensure an easy-to-fill template that will be properly formatted.

In addition to formatting, templates support data fields which can be auto-populated under some circumstances. These fields can be ADT (patient demographic) data as well as dictation job properties.

Database Storage and Access

A fundamental strategy of InfraWare's implementation of Templates is that they are stored in the platform database. Once uploaded, a document Template can be associated with one or more Document Types. (See the white paper on the subject of the Document Types implementation.) This makes them conveniently available during the steps in the workflow without the need for users to distribute and keep track of them outside of the programs. Contrasting to traditional methods involving each MT keeping lists of Templates, the features that follow outline significant advantages.

Document Templates (continued)

Template Creation

Template creation in the ITE is very easy. After starting the program, the user types or pastes any desired text and inserts desired fields from the Insert menu:

Uploading Templates

Once a Template has been created, it can be uploaded to the platform in one of two ways:

- Using the ITE, choose File, Save to Platform. The user is prompted for credentials and a target name.
 - Using the IMC by clicking the New Template button. On the upload page, type a meaningful description for the template and click browse to find the template on your computer. Next, click the Create New Template button to upload. When complete, the template should be visible in the list.
-

Document Templates (continued)

Transcription

Via features in the InfraWare Transcription Client (ITC), the platform supports the use of automatically populated document templates. After adding or accepting data on the ADT screen in the ITC, a template loads in the editor with completed field values.

Document Types

Upon submission of a dictation, the author specifies a Document Type. Among other parameters, Document Types can be associated with specific templates. In other words, when a physician enters Document Type *101* when beginning a telephone dictation that can determine that an MT will automatically receive a certain Template when she receives the dictation job itself.

For a description of the full set of Document Type parameters, please see the comparable white paper on that topic.

Network Performance and Security

Overview

Corporate networks are more difficult than ever to secure and support. Applications such as the InfraWare transcription service platform traverse the firewall, depend on Quality of Service (QoS) and span multiple groups of users.

As dependency on the network has grown to an all time high, information technology managers need specific information about the applications deployed. This white paper has been prepared to provide insight into the dependencies and nature of the applications that comprise the InfraWare Platform.

Audience: This document is for network managers who have a depth of understanding of network protocols, traffic management and security practices. Readers should also have a fundamental understanding of the components of the platform. This is available in the following white paper: Platform Overview. White papers are available at www.InfraWare.com/whitepapers/

Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Summary

The InfraWare clients, including the InfraWare Dictation Client (IDC, used to submit dictations) and the InfraWare Transcription Client (ITC, used to retrieve and correct reports) are 32-bit .Net Windows applications. They each communicate with the InfraWare Processing Center via https with a 128-bit encryption key.

Network Performance and Security (continued)

Privacy and Security

The entire InfraWare transcription service platform is designed to support stringent privacy and security practices, consistent with the Health Insurance Portability and Accountability Act (HIPAA) guidelines. Final analysis, determination of practices and results are the responsibility of the customer.

Databases stored on local computers by InfraWare client applications reside on the file system so they are dependent upon effective operating system security. (Windows XP Professional with the NTFS file system is recommended.)

Firewall

IP Filters: Each client application communicates routinely with the InfraWare Processing Center. Communication is via the https protocol on port 443 using a 128-bit SSL encryption key. Most firewalls are already configured to allow this communication when initiated by a user inside the firewall.

Proxy: Both client applications have configuration settings for proxy server environments, such as Microsoft's ISA server and Novell's BorderManager. Although supported, this configuration is not preferred. Proxy servers vary from publisher to publisher and from version to version. Even in network environments that include a proxy server, it is highly recommended to exempt the InfraWare traffic to allow direct communication through the firewall.

For VoIP, the requirements are more involved. QoS (below) can be important to prevent latency, but many firewalls (including Cisco PIX) do not support QoS.

QoS

Quality of Service (QoS) bandwidth management is only necessary for the Voice over Internet Protocol (VoIP) related components. VoIP requires real-time communication with minimal latency. QoS describes a process of reserving bandwidth and prioritizing packets on a network to ensure and application's communications needs are met.

Network Performance and Security (continued)

QoS (continued)

Where authors utilize VoIP telephones that connect directly to the InfraWare Processing Center as dictation stations, it is important to ensure adequate bandwidth to ensure quality recordings. (VoIP configured for local communication might also require QoS, but LAN environments are much more forgiving.)

Major portions of the Internet do not support QoS, but there is usually adequate bandwidth. The InfraWare Processing Center is connected to the Internet via a QoS-enabled network with multiple Internet providers. While it is possible for this portion of the network to experience latency issues, it is highly infrequent. The customer premise network and Internet connection comprise the highest risk areas for bandwidth bottlenecks.

Recommendation: Use a QoS-enabled Ethernet switch to assign a priority to VoIP traffic to ensure that VoIP dictations have real-time bandwidth availability.

Performance

Managing performance of the service involves meeting system requirements for devices and bandwidth. Naturally, it is important to access each component of the platform from computers that are free of viruses and malware. At this time, malware represents the single greatest risk to system performance.

Bandwidth: A broadband Internet connection is recommended. Nearly any properly performing DSL, cable modem or T1 connection will provide adequate bandwidth for one or a handful of users.

Dial-up is only lightly supported and only for the ITC. Original dictations generate large files that are impractical to send over dial-up connections. The ITC can operate effectively over dial-up in some cases because the WMA audio formatted files transmitted to the ITC from the Processing Center are much smaller than even the compressed versions of the original wave files.

Network Performance and Security (continued)

Performance

(The original dictations must be in wave format with only lossless compression to provide sufficient data to the speech recognition processing service.) How long would a 12 minute dictation take to pull down?

Practical study: A 9 minute dictation in the IDC will result in a 22K (sample rate) wav file of 23.1 MB in size. The IDC will compress this by about half to 12.7MB with a lossless compression algorithm prior to transmitting to the Processing Center. (Still a large file; thus the broadband requirement). After processing, the Center will transmit a WMA version of the file to the transcriptionist running the ITC which is roughly 156K/minute in size or 504k (.5MB).

The 9 min dictation would be about a 5 minute download at 48.8kb/s. By contrast, a 768k DSL circuit would download that same dictation in under 1 minute. A T1 or fast cable modem could download the job in just 15 to 25 seconds.

System Requirements for InfraWare Client applications (ITC and IDC) follow.

System Requirements for InfraWare Client applications (ITC and IDC)

Hardware	Minimum	Recommended
Processor	1GHz Pentium	2GHz or above
Memory	512MB RAM	1GB RAM
Sound card	Windows Media Player compatible	Windows Media Player compatible
Microphone	Noise canceling, SRT	Noise canceling, SRT
Headset	Any PC based	InfraWare tested
Playback pedals (ITC)	USB/InfraWare only	USB/InfraWare only

Network Performance and Security (continued)**System Requirements
for InfraWare Client
applications (ITC and
IDC) (continued)**

Software	Minimum	Recommended
Operating System	Windows 2000 SP4 or higher	Windows XP SP2 or higher
.Net Framework ²	V2.0	V2.0
Browser for IMC	Internet Explorer (IE) version 6 (patched)	Internet Explorer (IE) version 7

Normals

Summary

The InfraWare transcription service platform supports a robust implementation of *Normals* (or standards).

This document introduces the major concepts for the Normals feature and presents strategies for adoption of the feature options.

Audience: Readers should have a fundamental understanding of the InfraWare platform.

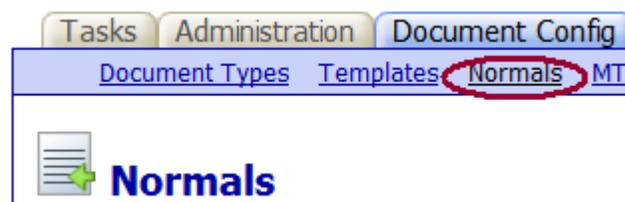
Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

Normals, sometimes called Standards, are blocks of text that are used often. To save time during dictation and transcription, an author can dictate a brief phrase such as, "my normal chest x-ray" and that text will be replaced with predefined expanded text. This is commonly performed in traditional medical transcription. The InfraWare implementation provides additional features for convenience and faster transcription production.

Feature Access

This platform feature is managed in the InfraWare Management Console (IMC). It can be viewed by authors and administrators. In addition, the InfraWare Transcription Client (ITC) supports related features for the transcriptionist.



Normals (continued)

Database Storage and Access

A fundamental strategy of InfraWare's implementation of Normals is that they are stored in the platform database. This makes them conveniently available during the steps in the workflow. Contrasting to traditional methods involving each MT keeping lists of Normals in Word or another editor, the features that follow outline significant advantages.

Scope

To aid administrative control over Normals, the platform supports the following levels of applicability: Account, Facility, and Author.

A Normal that is entered at the *author level* applies to that author *only*. Other authors can not see or use that Normal, but users with administration roles can see or even modify the normals.

A Normal that is set at the *facility level* applies to all authors associated with that facility. Since facility Normals are useable by any user in a given facility, they are particularly useful for replacements such as a facility's address, common names and frequently used blocks of text such as disclaimers and privacy notices that are not already built into templates for the final documents. Authors in other facilities are not affected.

Moving up a level, Normals set at the *account level* applies to all authors in all facilities associated with that account. (An account in the InfraWare platform is most commonly a transcription service company, MTSO.)

The global scope is a special scope reserved for InfraWare use that affects all users on the platform.

Authors can enter, modify and delete Normals at the Author scope, but they can only view Normals that apply to them from other scopes.

Normals (continued)

Formatting

On the Normals page in the IMC, editing is in rich text format (RTF). This means that the text can be formatted with all the basic elements of rich text – bold, italic, underline, strikethrough, sub- and superscript, bullets and alignment. This formatting will be preserved when later used in the ITC Editor and when delivered via RTF, Word or PDF file formats. Text entry and formatting is performed in an editor window in the lower right portion of the Normals page in a manner consistent with Word or similar text editors.

Transcription

During the transcription process, the ITC automatically gets copies of the author's Normals with each job they download. This is fast and in the background. At any time in the ITC editor, the MT can access those Normals by pressing Ctrl-N. When browsing for selection, they are organized by scope (author, facility, account, etc.)

First Draft (speech recognition)

Normals are supported on the platform with or without the First Draft speech recognition option, but the feature set is expanded when used.

During dictation, the Normal is simply spoken by the author. After the speech recognition's pass over the recording, the platform engages a second processing step which compares the resulting text in the First Draft with each of the Normals which apply to the author. Upon finding matches, the process will replace Normals with the expanded text on its own.

When Normals are substituted by the servers on the back-end prior to receipt by the MT, those blocks of text are highlighted for easy identification in the ITC editor. As a safeguard against error, the transcriptionist assigned to edit and correct the document is automatically provided with keystroke access to all Normals that apply to the author of every document they edit in the ITC.

Specifications

Summary

The InfraWare transcription service platform supports an easy-to-use implementation for Specifications.

This document introduces the major concepts for the Specifications feature and presents strategies for adoption of the feature options.

Audience: Readers should have a fundamental understanding of the InfraWare platform.

Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

Specifications are definitions of things a report must have to be complete. For instance, if your reports are bound, then you may require that the left margin always be two inches. This is a Specification.

The InfraWare platform supports defining Specifications for reports based on their Account, Document Category, Document Type, and Author. They are defined in the InfraWare Management Console (IMC) and optionally seen by transcriptionists in the InfraWare Transcription Client (ITC).

Feature Access

This platform feature is managed in the InfraWare Management Console (IMC). It can be viewed by authors and administrators. In addition, the InfraWare Transcription Client (ITC) supports related features for the transcriptionist.



Database Storage and Access

A fundamental strategy of InfraWare's implementation of Specifications is that they are stored in the platform database. This makes them available during the steps in the workflow, and thereby improves the quality of reports produced by transcriptionists.

Scope

To aid administrative control over Specifications, the platform supports the following levels of applicability: Account, Facility, Document Category, Document Type, and Author.

A Specification that is entered at the author level applies to that author only. Other authors can not see or use that Specification, but users with administration roles can see or even modify the specifications.

Specifications entered at the document category level apply only to documents of that particular document category.

The same is true of specifications set at the document type level.

A Specification that is set at the facility level applies to all documents associated with that facility. Since facility Specifications are useable by any user in a given facility, they are particularly useful for defining things such as a margin requirement for binding or details of what should be in the footer of each page that are not already built into the templates. Documents produced for other facilities are not affected.

Moving up a level, Specifications set at the account level apply to all documents in all facilities associated with that account. (An account in the InfraWare platform is most commonly a transcription service company, MTSO.)

Authors can enter, modify and delete Specifications at the Author scope, but they can only view Specifications that apply to them from other scopes.

Account Administrators can enter, modify, and delete Specifications at any level for the account.

Specifications (continued)

**Notifying
Transcriptionists**

On the Document Specifications page of the IMC, creating or editing a specification offers two important options. The first is the option to let transcriptionists see the specification; this is useful for specifications that the MTs should complete while editing the document.

The second option is to prompt the MT with a check question. If this is selected, the MT will be prompted with a question when they to mark a dictation complete. If the MT answers that they have not completed the specification, they will not be able to submit the document as complete.

Transcription

During the transcription process, the ITC automatically gets copies of the document's Specifications with each job they download. This is fast and happens in the background. At any time in the ITC editor, the MT can access those Specifications by pressing F3. When browsing for selection, the level at which the specification is defined is displayed.

Security, Permissions and Privacy

Summary

The InfraWare transcription service platform supports a robust implementation for *Security, Permissions and Privacy*.

This document introduces the major concepts for these important security features and presents strategies for effectively adopting the platform while ensuring confidence.

Audience: Readers should have a fundamental understanding of the InfraWare platform.

Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

In this era of medical privacy concerns, security is of paramount importance. The InfraWare platform provides security implementations to safeguard patient privacy and to promote reliable operations for users. Information Technology (IT) security takes place at many levels, and this document discusses issues at each level.

Roles and Permissions

Permissions to access documents and view or modify parameters in the InfraWare platform are managed by Roles. After creating a user in the IMC, an Administrator selects Roles for the user. For logged-in users, these Roles control access to dictations, documents, administrative information and tasks.

Roles exist in two levels: Account and Facility. A Role applied at the Account level provides permissions across the entire Account, including all Facilities which exist under the Account. Roles applied to a Facility apply only to that facility. The Roles supported are:

Security, Permissions and Privacy (continued)

Roles and Permissions (continued)

Account Roles

- Account Administrator
- Account Manager
- Account System Administrator
- Transcriptionist

Facility Roles

- Facility Administrator
- Facility Executive
- Author

Role Definitions:

Account Administrators:

This role is intended for users who need to access and manage any area of the system. Users assigned this role can manage all facets of the system, including: users, accounts, and facilities. They may also view financial billing reports, assign roles, change contact information, and reset passwords.

Account Manager:

This role is intended for users who will be managing the day-to-day operations of the Queue and Transcriptionists. Users assigned this role will be able to modify settings associated with the overall workflow, such as Transcriptionists settings, Document Types, pools, priority, and job assignments. Account Managers will also have access to non-financial reports, such as activity reports.

Account System Administrators:

This role is intended to be a supporting role to allow the assigned user to reset passwords and update existing user information. Users assigned this role will often also be an Account Manager.

Security, Permissions and Privacy (continued)

Transcriptionists:

This role is intended for users who will be transcribing dictations. Users assigned this role will use the InfraWare Transcription Client (ITC) to retrieve and transcribe dictations from the system.

Facility Administrators:

This role is intended for users who will be managing facility users and information. Users assigned this role will be able to modify contact information and reset passwords for any users who are assigned roles in their facility. Users will also be able to view information relevant to their facility, such as the Queue and Document Types.

Authors:

This role is intended for users who will be creating dictations that will be managed on the platform. Users assigned this role may create the voice record to be transcribed, modify their information, create personalized normals, and view the status of their submitted dictations.

Facility Executives:

This role is intended for users who require access to reports for a given facility, such as Medical Records directors. Users with this role will be able to view and print reports relevant to their facility.

Pools

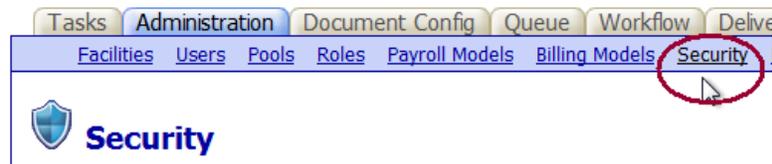
Pools of authors and transcriptionists are supported on the platform to provide administrators with an opportunity to broadly assign work to MTs that meet certain criteria for inclusion in a Pool. Pools can be created, and users assigned membership, in the IMC under Administration/Pools.

Security, Permissions and Privacy (continued)

Passwords and User Security

Passwords are an important part of any IT security strategy. The platform supports a policy of specifying a minimum password length, use of both upper and lower case characters and use of special characters (such as !, @, #, \$, etc.) In addition, InfraWare recommends an organizational policy to require password changes on a periodic basis.

Passwords used in the platform are stored in the database as hash values. This means that even the IT professionals that maintain the database can not see your password to learn it. A consequence is that support personnel can not help you remember your password if forgotten. They can, however, help you replace it with a new one.



Network Security

Network communications represent an important layer of security. The InfraWare platform is a suite of applications that run over the Internet. Since any Internet traffic is potentially vulnerable to interception by non-trusted parties, it is critical that the traffic be protected. The solution to transmitting sensitive information over public circuits is encryption.

Encryption is a method of scrambling information prior to transmitting it. A *key* is used to scramble the data in a certain way. If the receiving computer knows the same key, it can descramble the data to see the originally intended message. If a third party were to intercept a message, they would only see the scrambled version. Unless they could guess the encryption key, they could not descramble it to see the actual content.

Security, Permissions and Privacy (continued)

Network Security (continued)

All InfraWare data traffic between user computers and servers in the processing center is encrypted with a 128-bit public key. (At this time, security experts consider 128-bit keys to be virtually unbreakable and they are the industry standard for secure communication over the Internet). When logged into the IMC, evidence of this encryption is displayed by the closed lock in the lower right area of the browser screen.



Since communication with a web browser can be either encrypted or not, it is necessary to display the lock (either closed, or not). The InfraWare Windows clients (including the IDC and ITC) which install on end-user computers will only communicate over an encrypted path and there is no need to display a visual indication of encryption.

The parameters associated with network security on the InfraWare platform do not require significant configuration. The encrypted traffic takes place using the https protocol. Nearly all firewalls are configured to allow this type of traffic. In the rare case that a firewall would be configured otherwise, it would need to be changed.

Additionally, some commercial facilities use a device known as a *proxy* or *caching* server to route end-user Internet requests. That poses no problem to IMC users, but ITC and IDC users who are only allowed Internet access through this method will need to set a proxy configuration parameter under Settings/User Settings in the client.

Speech Recognition

Summary

The InfraWare transcription service platform supports a robust implementation for back end *Speech Recognition*. This document introduces the major concepts for the Speech Recognition feature and presents strategies for adoption of the feature options to promote efficiency in the transcription workflow.

Audience: Readers should have a fundamental understanding of the InfraWare platform.

Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

The InfraWare transcription service platform supports an optional, back-end speech recognition service to improve MT's (medical transcriptionist's) productivity. Upon receipt of digital dictations, the platform queues them for speech recognition and prepares the First Draft text for download with the audio dictation by the MT. The typical availability is within 60 minutes of receipt of the dictation.

Back-end

In general, speech recognition applications can be classified as either front-end or back-end systems. A front-end system is a program that runs on the author's computer and performs recognition in real-time as they speak. There are certain applications for which front-end systems shine, but with the possible exception of the radiology specialty, medical transcription is not such an application.

In contrast, a back-end implementation of speech recognition occurs down-stream (after the author finishes and before the MT begins) on a server without the involvement of the author. This removes the burden of interaction from the author and presents the benefits into the traditional workflow where they can best be utilized by the MT who will generate a quality document.

Speech Recognition (continued)

Accuracy/ First Draft

InfraWare describes the output from the speech recognition process as a First Draft. Accordingly, it is intended to be a useful document for an editor to refine, but it is not a quality document as produced.

Studies indicate that a proficient editor can save time and improve efficiency when the accuracy of the First Draft is above 80%. Results greater than 80% are certainly achievable and greater accuracy yields even better efficiency in the editing process. Unlike many speech recognition vendors, InfraWare does not claim “best case” accuracy benchmarks in the 94+% range. The value proposition presented by the InfraWare platform is derived from dramatic improvements in MT efficiency (by reducing keystrokes and unit production time). The requirement for an MT/Editor is built-in to the workflow model so every document must be edited. It follows that doubling the number of lines an MT produces per hour is very achievable. Increasing the speech recognition accuracy, say from 88% to 92%, is somewhat helpful but not critical.

Controlling Speech Recognition

There may be particular Authors, Facilities, or even Accounts that do not wish to make use of the First Draft feature of the InfraWare platform. It is possible to turn off First Draft creations at each of these levels.

If an Account has First Drafts turned off, no First Drafts are produced for any Author in any Facility of the Account, even if First Drafts are not specifically turned off for some of the Facilities or Authors. Likewise, disabling First Drafts for a Facility supersedes any Author settings.

The InfraWare Management Console (IMC) offers two ways to modify the accuracy of the First Draft: dictionaries and focuses. A dictionary is a broadly-defined category for the document, such as Medical, Legal, or Business. These determine what language dictionaries the Speech Recognition Engine uses to identify words. A focus is a more detailed label, such as “Sports Medicine”, that offers further specificity. These can be set for Document Types and Authors. Definitions at the Document Type level override those defined at the Author level.

Speech Recognition (continued)

Transcription/Editing

The process of editing and correcting a First Draft is usually performed in the InfraWare Transcription Client (ITC). This program installs on the MTs computer and is used to download, process and return documents to the InfraWare Processing Center. The ITC also integrates with Microsoft Word for template support, but editing of the narrative happens in the ITC's own built-in editor which was designed especially for efficient playback and editing. A hallmark feature is the synchronization of the dictation audio with the text of the first draft. When the audio is played with the pedals, the cursor follows along. Likewise, when the cursor is repositioned by the keyboard, the audio moves to that location.

Normals (Standards)

Normals are supported on the platform with or without the First Draft speech recognition option, but the feature set is expanded when First Draft speech recognition is used.

During dictation, the Normal is simply spoken by the author. After the speech recognition's pass over the recording, the platform engages a second processing step which compares the resulting text in the First Draft with each of the Normals which apply to the author. Upon finding matches, the process will replace Normals with the expanded text on its own.

When Normals are substituted by the servers on the back-end prior to receipt by the MT, those blocks of text are highlighted for easy identification in the ITC editor. As a safeguard against error, the transcriptionist assigned to edit and correct the document is automatically provided with keystroke access to all Normals that apply to the author of every document they edit in the ITC.

Note: Many of the components described in this white paper are covered in more specific detail in white papers on those topics.

Workflow: Transcription, QA and eSign-off

Summary

The InfraWare transcription service platform supports a flexible Workflow logic, including the routing of dictations to MTs, Quality Assurance (QA) and electronic document Sign-off steps.

This document introduces the related features of the platform and provides insight into effective strategies to accomplish organizational goals.

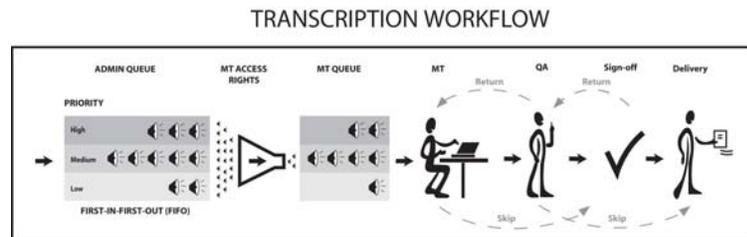
Audience: Readers should have a fundamental understanding of the InfraWare platform.

Disclaimer: Note that not all customers use every component of the platform, so portions of this document may not apply. In addition, dependencies, behaviors and features change from time to time. This information is designed to be helpful but is not warranted.

Overview

Workflow describes the routing of documents through various work stages, including the sequencing of work and the workers who are tasked.

Upon submission of a new dictation, it is queued for any required back-end processing. Upon completion, the job is queued for transcription by an MT. The order in which these jobs are queued follows a logical algorithm.



Workflow: Transcription, QA and eSign-off (continued)

FIFO and Priority

In general, jobs are processed in either a first-in, first-out (FIFO) basis, or by the turn-around time (TAT) remaining. If the queue method is FIFO the dictations are ordered by priority (STAT / not STAT) then by the date they were submitted. If the queue method is based on the turn-around time remaining, they are ordered by turn-around time, then job priority, and finally the date the job was submitted.

When a dictation is submitted, a Priority can be manually or automatically applied. Jobs within a certain Priority are processed by FIFO, but a high Priority job that was recently submitted is likely to be processed ahead of a lower Priority job that has been in the queue longer. MT access rights can impact on the order of job processing when an MT isn't allowed access to the next job.

Masks

Masks can be applied to a MT work session such that the queue appears to filtered to jobs meeting certain criteria (i.e. Radiology) until no jobs matching that criteria remain.

Urgent Dictations

A dictation can also be marked as urgent, which will allow it to be downloaded next even if it is not highest in the admin queue. A dictation can be marked urgent for an entire account, for a specific MT, or for a specific pool.

When the InfraWare Transcription Client (ITC) looks for a new dictation to download, urgent dictations marked for the MT will take highest priority. If there are none marked for the MT, the ITC will download urgent dictations marked for any pools the MT is in. Following this, the ITC downloads any dictations the MT has access to that are marked as urgent for the entire account. If there are no urgent dictations marked for the MT, any of her pools, or for the entire account, the ITC downloads the next dictation from the queue using either FIFO or the turn-around time ordering, as described above.

If there is more than one dictation marked as urgent, an Administrator can go to the Manage Urgent Dictations page in the IMC to specify what order the dictations should be downloaded in.

Workflow: Transcription, QA and eSign-off (continued)

Urgent Dictations (continued)



Job Properties

View Job Properties	View Delivery Information	View Audit Trail
Dictation ID: 5864	Duration: 13:03	Submitted: 10/20/2006 2:05:10 PM
Status: Ready for download	Author: Artois, Charles	Check-Out none
Facility: Community Hospital 64	Check-Out Date:	STAT: <input type="checkbox"/>
Checked-Out By:	Document Type: Demo Type	Subject: NJM Training beginning at 116
	Edit Document Type Properties	Edit Job Properties

Assignment

Assigned MT: Artois, Charles

Marked as urgent for this I

[Manage urgency order](#)

[Edit Sign-Off Assignment](#)

[Edit QA](#)

[Edit Transcriptionist Assignment](#)

If a transcriptionist belongs to more than one pool, and more than one of the pools she is a member of have urgent dictations assigned to them, the ITC will receive the dictation “ranked” highest from each pool based on the queuing method of the account.

It is also important to note that in order for a dictation to be marked urgent for a transcriptionist / pool, it must be assigned to that transcriptionist / pool, and in order for a dictation to be marked urgent for an entire account it cannot be assigned to one specific user or pool.

In summary, the order in which the ITC downloads urgent dictations is:

- Urgent dictations for the MT
- Urgent dictations for the MT’s pool (ties are broken by queuing method)
- Urgent dictations for the account
- Unassigned dictations, dictations assigned to this MT, dictations assigned to a pool this MT is a member of (ordered by queuing method)

Workflow: Transcription, QA and eSign-off (continued)

Determining Steps

Steps in the workflow can be executed or skipped, based on the intent of the transcription manager. The decision to execute or skip steps can be made manually or automatically.

Manual Assignments

Manual assignments include the options to:

- Assign a dictation job to a specific MT or Pool
- Change the Priority of a job
- Set or change the requirement for the QA step
- Set or change the requirement for the eSign-off step

Automatic Assignment

Automatic settings for these steps can be set by default, prior to submission of new dictations, but defining the need for each step based on:

- Transcriptions
- Author
- Document Type
- Document Category
- Facility
- Account-wide

Because automatic QA and eSign-off settings may exist for any or all of these dictation characteristics, any of the settings may be used for dictations with multiple settings.

For example, if a transcription manager were to create QA requirements that User X can QA for Document Type X and User Y can QA for Author Y, dictations of Document Type X by Author Y can be QA'd by either User X or User Y.

QA and eSign-off requirements can also assigned for individual documents from the management queue.

Workflow: Transcription, QA and eSign-off (continued)

Permissions, Roles and Pools

Permissions affect who in the platform is eligible to:

- Process for transcription
- Set the QA assignment (or lack thereof)
- Mark a document *QA Complete*/return a document for correction/upload a document correction.
- Set the eSign-off requirements
- Perform the eSign-off/return a document for correction/upload a document correction.

For more information on the subject, please see the white paper titled: *InfraWare Implementation of Security, Permissions and Privacy*.

eSign-off

InfraWare's electronic Sign-off functionality operates in a very similar fashion to the QA process, with a few notable exceptions. Most of the eSign-off process is done at the facility instead of the account, which means eSign-off is assigned to facility-level users and pools, and no default eSign-off setting can be set for the account.

Document Delivery

Following eSign-off, or the last step in the transcription process when eSign-off is not used, the final role of the platform is to deliver the completed documents to their destination. InfraWare's Document Delivery System (DDS) is documented separately.

Appendices

Appendix A: Logo Replacement

Overview

You can *brand* the InfraWare Management Console (IMC) by replacing the default InfraWare logo with your own logo. The process is very simple.

Note: This step will not eliminate references to InfraWare. It is simply designed to give your company the primary identification.

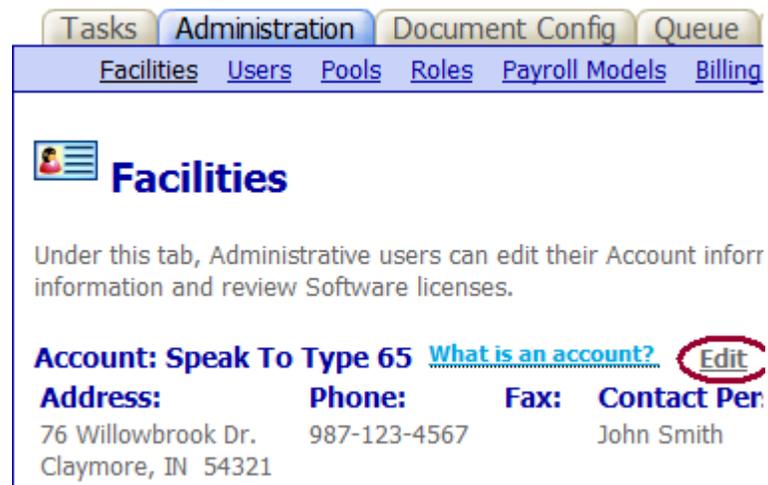
Logo Requirements

InfraWare recommends that you use a jpg or gif version of your logo with a maximum width of 150 pixels and an ideal height of 60 pixels. You might need to modify your image to fit nicely.

Steps

Once your logo is ready to go, follow these steps:

1. Login to the IMC as an administrative user.
2. Click Administration
3. Click “Edit” to the right of your Account name.



4. Click “Change Logo”



The screenshot displays the 'Administration' tab in the InfraWare system. The 'Facilities' sub-tab is selected, showing a list of accounts. The first account is 'Speak To Type 65'. To the right of the account name is a 'Change Logo' button, which is circled in red. Below the account name is the InfraWare 360 logo. The interface also includes a navigation bar with tabs for 'Tasks', 'Administration', 'Document Config', and 'Queue', and a sub-menu with 'Facilities', 'Users', 'Pools', 'Roles', 'Payroll Models', and 'Billing'.

Tasks Administration Document Config Queue

Facilities Users Pools Roles Payroll Models Billing

 **Facilities**

Under this tab, Administrative users can edit their Account information and review Software licenses.

Account: **Speak To Type 65** [What is an account?](#) [Edit](#)

 [Change Logo](#)

Steps (continued)

5. On the next screen, click the Browse button and find the logo file on your computer.
 6. Click the Add Logo button.
 7. When complete, you should see your logo in the upper left of the IMC screens. If, for any reason, it doesn't look as expected, follow the same process and click the Revert to InfraWare Logo button instead of Add Logo. You can follow the process again at any time to replace your logo.
-

Displaying the Logo Image at Login

Your custom logo will be displayed in the IMC to all users under your account. Prior to login, however, when the user is typing their email address and password, the IMC does not know who will login and what logo to display. Without that knowledge, the InfraWare logo will be displayed. There are two optional work-around solutions.

Specify Account in URL

If you place a link to the IMC login on your website, the target URL would normally be:

<https://www.infraware.com/IMC/login.aspx>

The login page supports an optional parameter that tells it the Account for which the user plans to login. This provides enough information for the page to display the logo associated with that account. Example:

[https://www.infraware.com/IMC/login.aspx?accountID=xx
xxconfirmationcode=yyyy](https://www.infraware.com/IMC/login.aspx?accountID=xx
xxconfirmationcode=yyyy)

Where xxxx is your Account ID, which can be found in the IMC under Administration if you Edit the account. The

Confirmation Code of yyyy is a random code generated for each account to protect your account from suspicious access. To identify the exact URL for your account login with your customer logo displayed, return to the Account Logo page in the IMC by navigating: Administration, Edit (Account), Change Logo. If you have a custom logo uploaded, the very bottom of this page will display a URL like the one above that is custom to your account.

Appendix A: Logo Replacement (continued)

Cookie remembers last Account login

Once a user has followed a custom login link (as above) a cookie is placed on their computer to remember the account used. A *cookie* is a small file that a web server places on a user's computer to remember that user. Most web browsers support cookies, and although they can be disabled, most users leave them enabled. When a user returns to the login page at a later time, if the cookie exists, that Account ID is observed even if an Account ID isn't specified in the URL.

Appendix B: Data Import

Overview

If you have a significant number of Users or Document Types, the clerical task of entering each into the IMC can become a time investment. As an alternative, InfraWare supports importing such information from a text or Excel file that you generate from your existing system. An electronic copy of these forms can be found on the CD that was sent as part of your Welcome Kit package.

File Formats

If you choose to import, InfraWare will provide that service to you, so long as you prepare the import file as either a flat, comma delimited text file or a Microsoft Excel file with the following field definitions:

Users

Field Name	Size	Remarks
EMAILADDRESS	100	Up to 100 characters in <u>user@domain.com</u> format
FIRSTNAME	50	User's first name
LASTNAME	50	User's last name
PREFIX	10	Any prefix prior to the name (i.e Mr., Dr., Ms.)
SUFFIX	20	Any suffix (i.e. M.D., PhD., RN)
FACILITY	50	For Facility users, list the Facility. For Account users (most MTs) leave blank. Facility entries for a single facility must be identical.

Appendix B: Data Import (continued)
Users

Field Name	Size	Remarks
IMCPASSWORD	50	Initial password to login to the Management Console can be changed by user after first login.
TDSLOGIN	10	Numeric string to identify user for telephone dictation.
FIRSTNAME	50	User's first name
LASTNAME	50	User's last name
PREFIX	10	Any prefix prior to the name (i.e Mr., Dr., Ms.)
SUFFIX	20	Any suffix (i.e. M.D., PhD., RN)
FACILITY	50	For Facility users, list the Facility. For Account users (most MTs) leave blank. Facility entries for a single facility must be identical.
IMCPASSWORD	50	Initial password to login to the Management Console can be changed by user after first login.
TDSLOGIN	10	Numeric string to identify user for telephone dictation.

Appendix B: Data Import (continued)

Users (continued)

Field Name	Size	Remarks
TDSPIN	10	Numeric string for pin/password for telephone dictation.
TRANSCRIPTIONIST	1	Role identifier.
ADMIN (Account)	1	Role identifier. (Account wide Admin)
MANAGER	1	Role identifier.
SYSTEMADMIN (Account)	1	Role identifier. (Account wide)
AUTHOR	1	Role identifier. (Requires Facility entry)
SYSTEMADMIN	1	Role identifier. (Requires Facility entry)
EXECUTIVE	1	Role identifier. (Requires Facility entry)

Role Identifier: 1=yes; 2=no.

Document Types

A sample import file is provided on CD. The definition of various Roles is beyond the scope of this document. If you need assistance with Account and Facility Roles, please see the training materials on that subject.

InfraWare will work with you to support importing as much user and role importation as you can provide in a logical, consistent format. The basic import template, which works for nearly everyone, covers only user information for simplicity.

Appendix B: Data Import (continued)
**Document Types
(continued)**

Document Types have limited support for data import as well. Many features must be manually configured once imported, but if you have a volum

e of categories and Types, importing the basic information can save time. The file format:

Field Name	Size	Remarks
FACILITY	50	Name of a Facility in the Account. Must match exactly.
DOCUMENTCATEGORY	50	Name of the Category to which this Type will belong (folder).
DOCTYPENAME	50	Name of the Document Type (may contain spaces, must be unique).
TYPEID	4	Up to four numeric digits (used for telephone dictation).
DICTIONARY	50	Options: General, Medical, Legal or blank. Used for basic speech recognition setting.

Upon completion of a properly formatted file, submit to your InfraWare Customer Support Representative for review.

Appendix D: Sample Communications

Directions

The following are sample messages to the stakeholders of your organization (customers, employees). These are provided to save time and accelerate your progress. The key points have proven to effectively address their primary areas of concern and to show your new plans in their best light. You will likely want to fine tune the messages to make them feel more natural based on your communication style and selected features.

For delivery, use your best judgment. Many new customers simply use email. Some prefer the formality of letters. If the message communicates a fundamental change to the way people will work, it may be in your best interest to make telephone calls and follow-up with these messages as thorough, written communication.

An electronic copy of these forms can be found on the CD that was sent as part of your Welcome Kit package.

Search and Replace

Following InfraWare's convention using our fictional company, these sample messages contain the following bracketed variables. Be sure to replace them with your language prior to sending.

[Speak to Type] with the name of your organization.

[employees] with what you call MTs (employees, MTs, sub-contractors, etc.)

[Owner] with the name of the owner or manager sending messages

Appendix D: Sample Communications (continued)

MT Message #1

Dear MT,

[Speak to Type] values your role in our organization. As you know, the field of medical transcription is changing and becoming more competitive. From technology to off-shore providers, companies like ours are under increasing pressure to reduce costs and increase productivity.

We believe in our [employees], and we believe in the quality medical records that this organization produces through your dedicated efforts. By combining innovative technology with our fantastic human resources, we can remain competitive and continue to prosper together as our industry evolves.

It is with a great deal of enthusiasm that I inform you of our investment in a new transcription platform that takes our workflow to the next level. We have chosen a system that is easy to learn and that will strengthen our ability to work together.

The new system will allow us to complete more work in less time. Tools will eliminate some manual steps

[Use the following paragraph only if SRT will be used]
Leverage your knowledge, better safety, evolution from MT to knowledgeable worker

Additional information will follow that contains:

- Scheduled training for you (online)
- Login credentials for your own test drive
- License Key info for when you install the software.

We will follow a deliberate process of converting to the new system, and you will play an integral role. Please continue to work as usual while those plans are refined. We will give you plenty of notice for steps along the way.

[Owner]

Appendix D: Sample Communications (continued)

MT Message #2

Dear MT,

As previously communicated, [Speak to Type] is transitioning to a new platform. Please save this email in an important place for later reference.

Training is scheduled for: _____

Your login credentials for the platform are:

The software you will be using is located on the Software tab in the InfraWare Management Console (IMC). During training, you will get instructions for downloading and installing the InfraWare Transcription Client (ITC). Upon doing so, you will be prompted for a License Key:

Thank you for your best efforts as we navigate these changes for a better future.

[Owner]

Appendix D: Sample Communications (continued)

**Customer Message –
Medical Records
Director**

Dear Customer,

At [Speak to Type] it is our pleasure to serve you. We appreciate the confidence you place in our hands each and every day with your critical transcription needs.

We have invested in a new technology platform to improve our level of service to you. While we have planned diligently to make the transition smooth, we want you to be aware that we will be going through the process beginning on _____

In addition, there are some powerful features in the new platform that can be exposed to you, if you desire. We can provide secure logins for members of the medical record staff to monitor progress in the queue of work, among other things.

Please let us know if you have any questions or concerns.

Sincerely,

[Owner]

Appendix D: Sample Communications (continued)

Customer Message – Physicians/Authors

Note: If dictation methods will not change for authors, many MTSOs do not communicate with physicians about the change in platform unless they are actively involved in a workflow process. eSign-off, for example, constitutes a need to provide light training to authors.

Dear Customer,

Your business is very important to us, and we are striving to keep on top of technology so that we may continue to provide the best service possible.

[Speak to Type] has adopted a new, state-of-the-art transcription processing platform which will improve our service to you. Among the many benefits are the opportunities for you to interact with the system, if you desire. The platform supports eSign-off as well as the ability for you to check the status of your dictations on a web page.

[Include this section only if dictation practices are changing.]

As of [date of change] your dictation process will need to change slightly as follows:

[include change info appropriate to the users]

Sincerely,

[Owner]
