# Quick Start Guide

*for*

# Authors using the Secure Web Portal

## Introduction

You want to produce accurate documents quickly. This Quick Start Guide contains concise information to help you get started with minimal effort.

The Quick Start Guide provides the retrieval process of completed documents via InfraWare's secure web portal.

For more in-depth tutorials and information, see the InfraWare Knowledge Base – http://www.infraware.com/KB, and the InfraWare Documentation Portal – www.InfraWare.com/toc .

## InfraWare Secure Web Portal

The InfraWare Secure Web Portal is a secure website used by dictating authors and their office staff to retrieve, and optionally eSign, or even edit, their completed reports. Retrieval can be in the form of download or printing.

Downloads can be in a number of file formats including RTF, DOC and PDF. The name of files downloaded can be scripted to include a number of variables including information about the dictation and the patient.

Printing can be accomplished right from the Portal without the need to download or load a report into an application program on the user's computer.

Users can choose to accept or reject a report as provided. They can type comment notes or even edit reports in their browser right on the Portal.

Finding reports in the Portal is very easy via two search features: the Quick Search and Saved Searches. The default view (search) can be customized to provide the experience preferred by each user.

Authors can login to the Web Portal using their registered email address and password using Internet Explorer at the following address:

> https://app.infraware.com/portal/

Note: The InfraWare 360 platform also supports automatic hands-free delivery of documents via fax, printing, interface, CDA, and secure ftp through the Document Delivery Service (DDS). The DDS is a separate module and is not discussed in this document.

## Search Panel (Finding desired reports)

Search Panel (shown below):  Located above the list of jobs, this can be used to perform Quick Searches by one or more criteria or a more complex Saved Search (explained below).



## Saved Search

Saved Searches designate the search criteria as well as which columns are included in the results and the order in which the displayed jobs are sorted.   These are typically set up by your Admin and may include specific data elements and criteria (KB106).
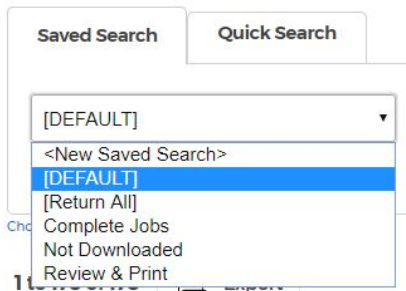


## Quick Search

Click the Quick Search tab and choose from the drop-down menu of fields, choose or enter criteria, choose the operator (Must Have, Must Not Have, Might Have), and click **Search**.



Click More to expand search criteria for up to 5 elements.  Click Less to reduce back to 1 element.

## eSign-off

eSign-off is an optional feature. Many users of the Web Portal will use eSign-off to confirm the readiness of a report for a patient's medical record.  Others will ignore this feature and choose to physically sign a printed report (for paper records) or import an electronic copy of the report into their electronic health record (EHR) or other application where it will be electronically signed.

To invoke the eSign-off feature in InfraWare, select one or more jobs on the Reports screen by clicking their checkbox then click the eSign-off link in the Actions area.  The eSign-off page appears.  To see a list of all jobs pending eSign go to the Reports tab, eSign-off sub-tab.  Review each job and select one of the following actions:

- Return for Corrections – Returns the job to the Transcription workflow.
- Return to reports – Takes you back to the Reports tab.
- Online Editor Sign Off – Launches the Online Editor for the eSign process.  See KB317 for details.
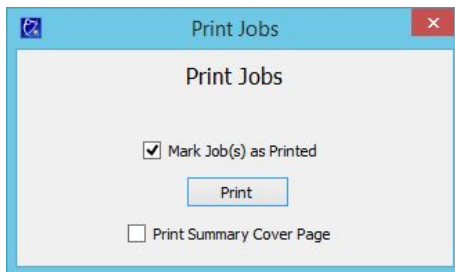
## Printing

Reports can be printed from the Web Portal.  Select one or more jobs on the Reports screen by clicking their checkbox then click the Online Editor Print icon in the Actions area.
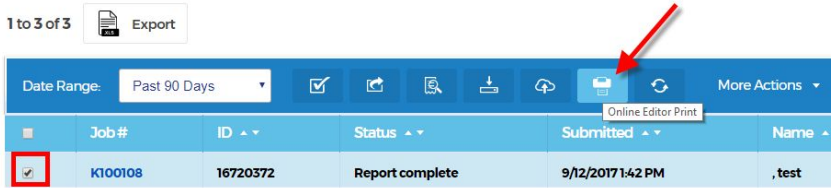


The Portal will render each report and prompt with the following message box:



After clicking Print, the computer's print dialog will load, which allows you to select the appropriate printer and any appropriate options (paper trays, etc.)  Click Print to send the document to the selected printer.

**Note:**  Alternatively, each report can be opened in an application (Microsoft Word or Adobe Acrobat Reader) and printed.  To do so, simply click the appropriate icon in the Downloads column.  When prompted, click Open, and then print as usual.  The actual printed page will vary slightly based on the application from which it is printed.

## Faxing

If you have permission, Reports can be faxed to referring physicians and other carbon copy recipients with the Fax on Demand feature.

Select one or more reports from the list and then click Fax Report(s) in the Actions area. See KB341 for additional details.
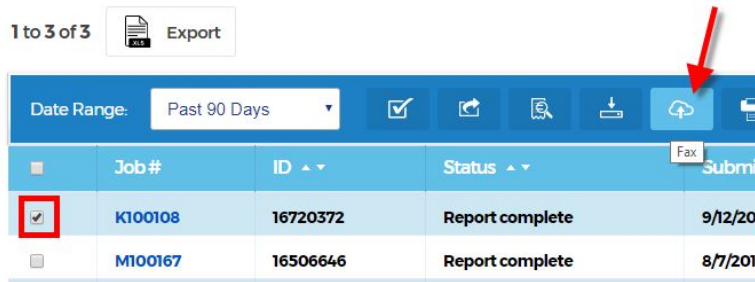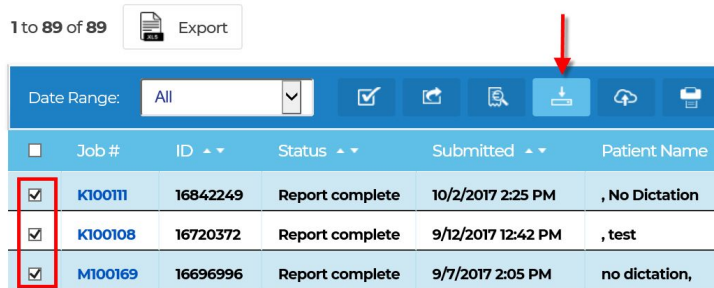


## Downloading

Reports can be easily downloaded to the provider's computer system two ways. See KB292 for additional details.

- One at a time – Click on the job number to open the Job Properties tab. In the upper right corner of this new window there are icons for RTF, DOC and PDF renderings of each completed report. Simply clicking one of these icons will pop-up a browser window allowing the user to select to either Open the document or Save the document.
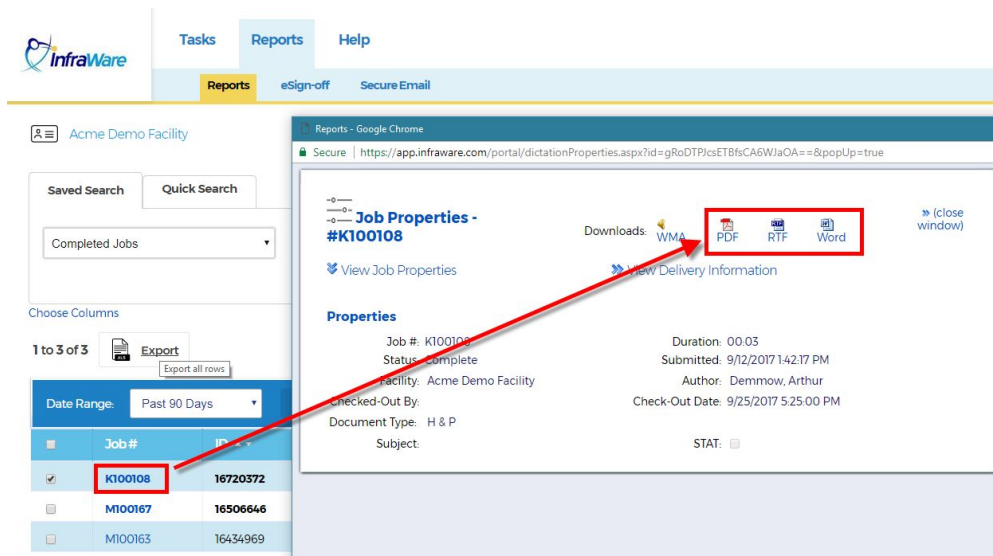
● Batches – Select the completed reports you want by clicking the check box on the very left edge of the screen.  In the Actions area, the click the Download icon.



o A pop-up window will display with options to choose the format of the document (Word, RFT, PDF) and how to combine the documents (Zipped, Merged, Individually).
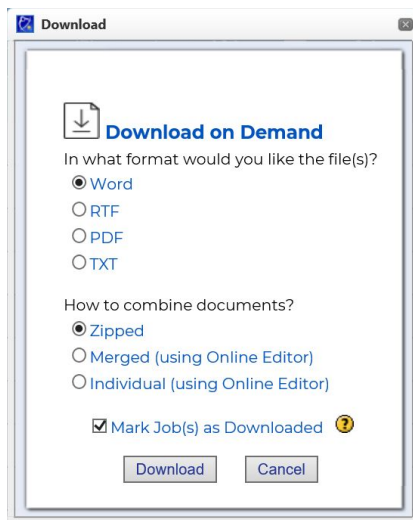


o If you want the document to be marked as Downloaded, you may check the box at the bottom of the window.

**Note:**  When saving (downloading) reports, the default filename is based on settings controlled by the Administrator in the InfraWare Management Console (IMC).  If you prefer changes to the suggested filename convention, submit that request to your administrator.