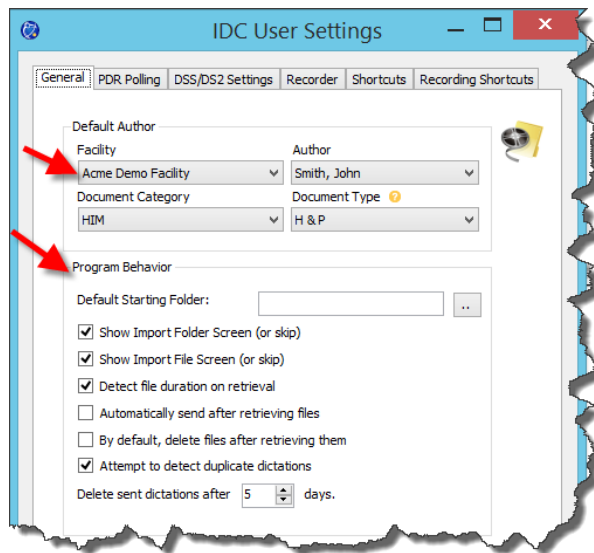# Handheld Upload Station Checklist

for the IDC

This summary checklist is a reference for trained administrators.

1. Setup the user who will operate the InfraWare Dictation Client (IDC)
   - ❏ Create the user who will operate the IDC in the IMC (if needed)
   - ❏ Add the Author role for this user
2. Setup Proxy if this user will upload dictations for other Authors
   - ❏ Login to the IMC as an Administrator
   - ❏ Click the user's name list on the Administration/Users page
   - ❏ Load the Author Settings page for this user by clicking Author Settings beside the facility role
   - ❏ Click Add/Remove under Proxy Submission Settings
   - ❏ Select each Author for whom the user will upload dictations and save
3. Install the InfraWare Dictation Client (IDC)
   - ❏ Prior to installing, verify each of the following system requirements
     - ❏ Windows XP with Service Pack 2 or above, or Windows Vista Service Pack 1 or above
     - ❏ 512MB RAM Memory (256MB will work with slow performance)
     - ❏ 1GB or more free disk storage
     - ❏ Update the Windows Installer Service (for WinXP)
   - ❏ Perform the installation
     - ❏ Login to the EHR Web Portal (EHR) as any valid user with Internet Explorer
     - ❏ Click on the Software tab
     - ❏ Click the Install link for the InfraWare Dictation Client (IDC)
     - ❏ When prompted, click Open or Run (not Save)
4. Login to the IDC - Set IDC User settings:
   - ❏ General Tab

   - ❏ Set Default Facility and Author (if user is set as proxy)

- ❏ Set Default Starting Folder
- ❏ Handheld Upload Station Checklist
- ❏ Verify the Drive letter of the Handheld. Go to My Computer → Check to ensure the Recorder created a drive letter that can be opened
- ❏ Note the drive letter, and look in the folders to find where dictations are stored
- ❏ In the IDC, select the Default Starting Folder in User Settings to this location
- ❏ Check off the next items if you would like them to appear: The less items checked, the less steps for the user.
    - ❏ Show Import Folder Screen (or skip)
    - ❏ Show Import File Screen (or skip)
    - ❏ Detect File Duration on Retrieval (Note: This adds time to upload from handheld)
    - ❏ Automatically send after retrieving files (Set this if all dictation settings are the same for all dictations on handheld – Author/Facility/Doc Cat/Doc Type/STAT
    - ❏ By Default, delete files after retrieving them (this deletes the files off of the handheld)
    - ❏ Delete Sent Dictations after _____ Days (select # of days before dictations are deleted from the IDC).
- ❏ PDR Polling Tab
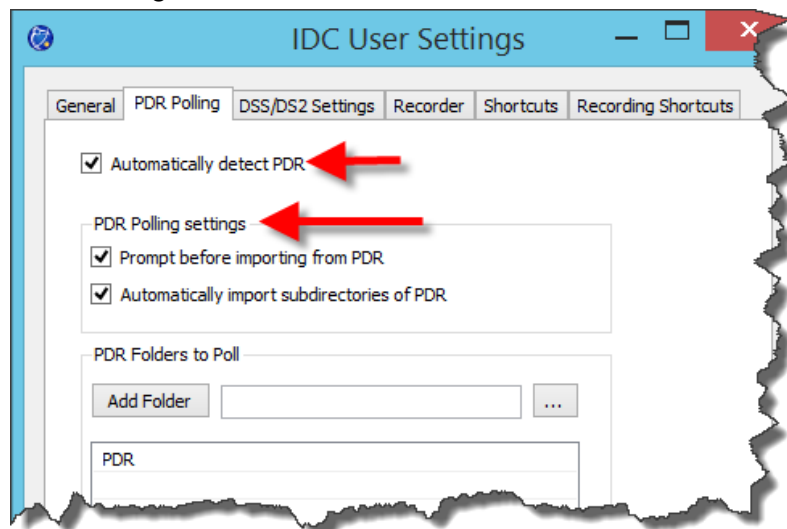
- ❏ Automatically detect PDR: This setting will detect when the handheld is connected and begin uploading the files immediately.
- ❏ PDR Polling Settings:
    - ❏ Prompt before importing from PDR: Requires approval before importing from PDR
    - ❏ Automatically import subdirectories of PDR: Check if all subdirectories need to be imported

❏ PDR Folders to Poll
    ❏ With the handheld connected, click "…" button and locate the Handheld Drive and Add each folder on the Handheld that you would like uploaded each time.
    ❏ Click Add folder for each folder.
❏ DSS/DS2 Settings Tab – This tab is only used if DSS/DS2 Matching will be used
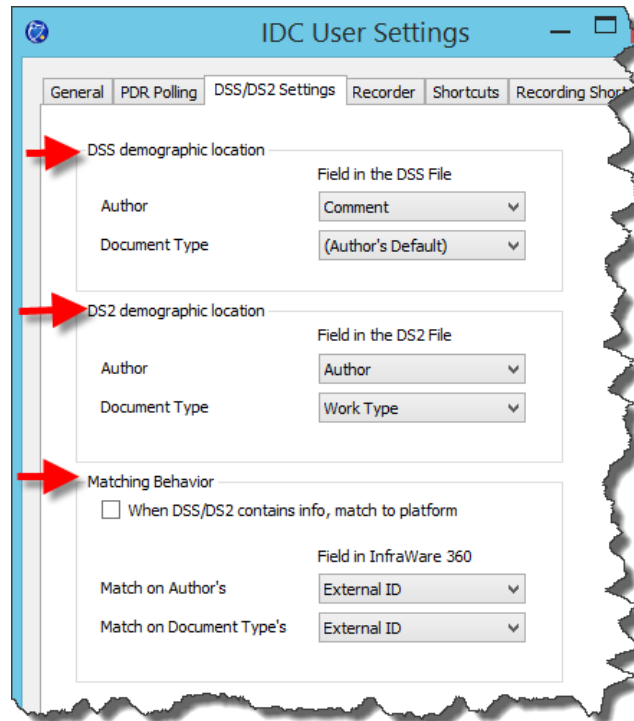
    ❏ Set DSS Demographic Location
        ❏ Author
        ❏ Document Type
    ❏ Set DS2 Demographic location
        ❏ Author
        ❏ Document Type
    ❏ Matching Behavior
        ❏ When DSS/DS2 contains information match to platform:
        ❏ Match to Author's--- Field in IW 360
        ❏ Match on Doc Type's-- Field in IW 360
❏ When all settings are complete:
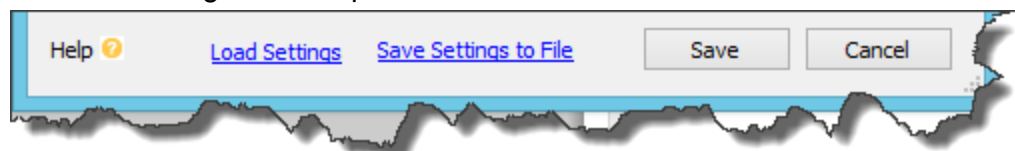
❏ Click Save Settings to File: Creates a backup copy of settings on the computer
❏ Click Save
5. Now the IDC is set to upload dictations when the handheld is connected to the computer.
6. In the main window, verify that the status of each dictation becomes "Sent" and a job number appears
    ❏ Verify jobs in the EHR Web Portal
        ❏ Click on the Job Number, links to the EHR Web Portal
        ❏ Sign in using your login and password to view the status of the job.