Chapter 18

Order and Report Management

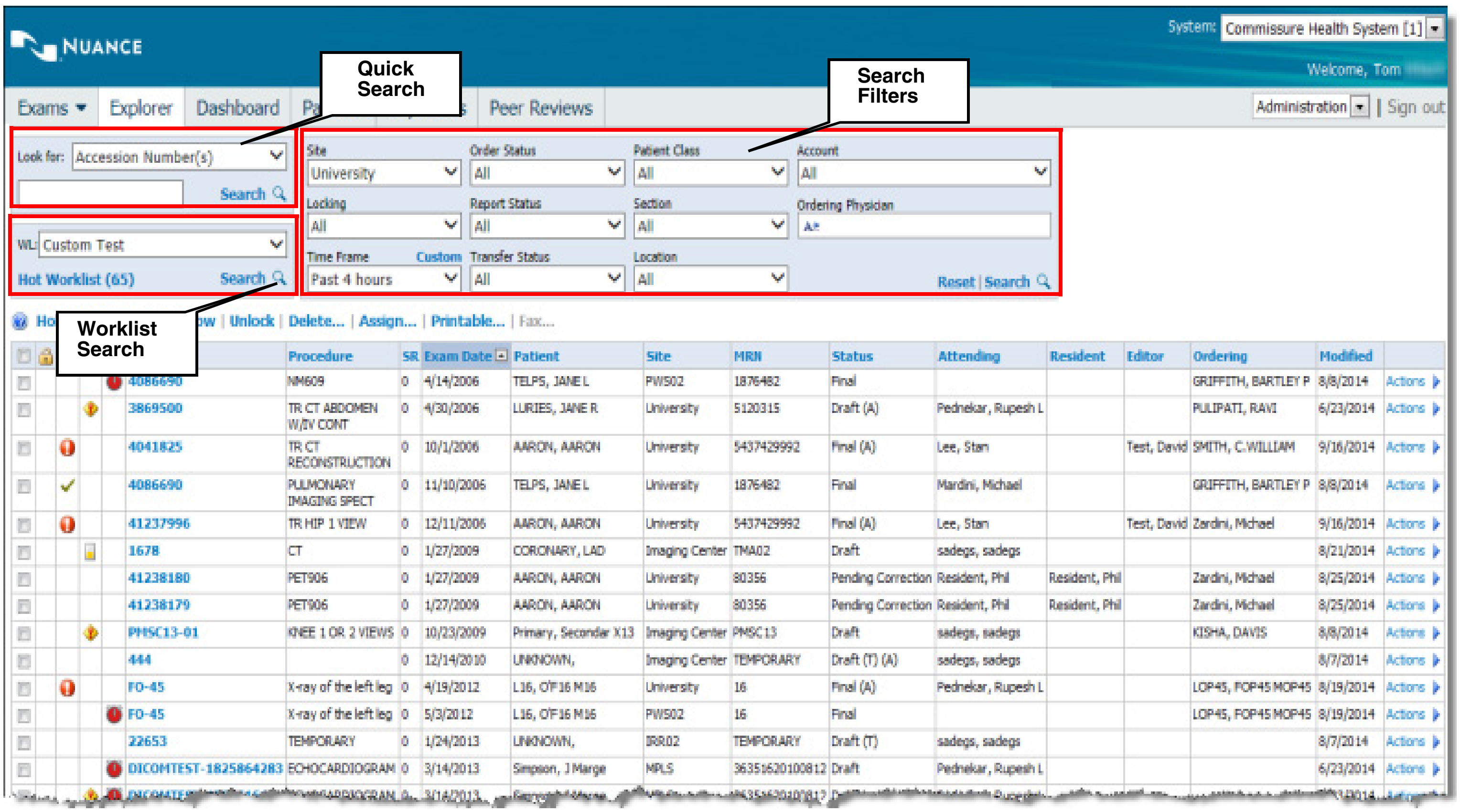
Objectives

In this chapter, you will:

- Manage orders and reports on the Explorer tab
- Use the Dashboard tab
- Create templates for print, fax, and cover sheets

Managing Orders and Reports on the Explorer Tab

You can use the **Explorer** tab in the **Exams** group to find and manage orders and reports. This tab provides access to the orders and reports in your system. It contains a search area for quick search by accession numbers and patients, another to invoke worklists, and another for using search filters. The system remembers your filter selections from one session to the next.



Once you have found the order you want to see, you can take various actions on it. You can:

- Associate an order with a report
- Reset an order's status to 'Draft'
- Modify an order's priority level
- Modify a report's diagnosis codes
- Change values in the custom fields
- Change a patient's MRN
- Download a printable version

Report audio is available in the Explorer only if the **Save Audio with Report** dictation preference is in effect (see page 75). A Nuance representative must configure the amount of time the system is to save the audio files.

Searching for Orders or Reports Across All Sites

Use the **Look for** field to search for orders or reports across all sites in a multi-site system.

Note: *The Look for search option does not take into account any of the other drop-down filters on this tab. These filters do not apply when you are doing a quick search.*

To search for orders or reports:

1. In the **Look for** drop-down list, select the criterion for the search you want to perform: Accession Number, Patient MRN, or Patient Last Name.
2. In the text entry field, type all or part of the accession number, MRN, or name.
3. Click **Search**. Any orders or reports that match your criteria appear in the results grid.

Tips:

- You can use an asterisk as a wild-card character; for example, select Patient Last Name and then type **Smi*** to find patients whose last names begin with Smi. Or, select Accession Number and then type **1234, *56***. The search returns the accession number 1234 and all the accessions that contain the string 56.
- You can use the percent character as a wild-card replacement for one or more characters; for example, select Patient MRN and type **1111%2**. The search returns MRNs such as **11102**, **11142**, **11162**, and **11192**.
- To search for multiple accessions, enter each accession followed by a comma.

Retrieving Worklists

In the **WL** (worklist) box, you can execute previously-defined, system-wide worklists. For information on creating worklists, refer to Chapter 16.

To retrieve a worklist:

1. In the **WL** drop-down list, select the desired worklist.
2. Click **Search**. Any orders or reports that meet the criteria in the worklist appear in the results grid.

Using the Search Filters

This set of filters allows you to search for orders, reports, or both that meet the criteria you select. Filters with a value other than **All** create a logical AND expression; that is, the filter retrieves only orders and reports that meet *all* your criteria.

To search using the filters:

1. Select or enter one or more of the following criteria for your search.
   - **Site**: In a multi-site system, search for orders and reports in a particular site.
   - **Order Status**: Search for orders of a particular status. The table below describes each status:

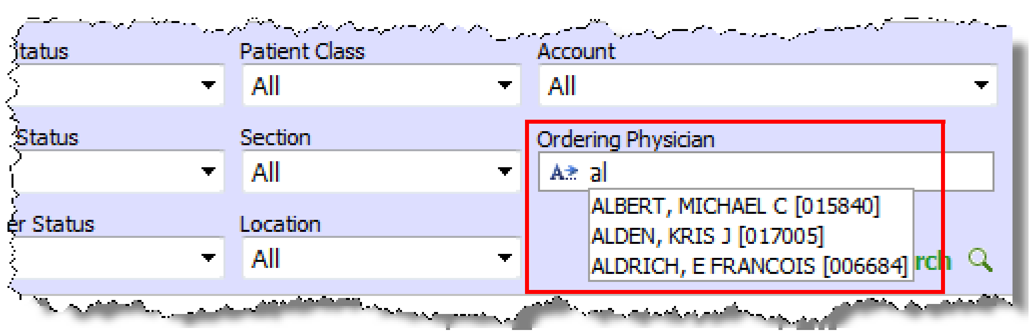
Status	Description
All	Uses all order statuses in the search.
Canceled	Order was canceled.
Completed	Order has been completed and is ready for reporting.
Scheduled	Order has been scheduled but not performed.
Temporary	Indicates a temporary order.
Dictated Ext.	

   - **Patient Class**: Search for a particular type of patient (Inpatient, Outpatient, Pre-Admit, Emergency, Recurring Patient, or Obstetrics).
   - **Account**: Search based on the resident who dictated the report, or the attending physician who dictated or is assigned to the report. Or, search by the transcriber or technologist. Inactive user accounts are omitted from the list.
   - **Locking**: Search based on a report's lock status (All, Locked, Unlocked, Assigned, Unassigned, Locked or Assigned, Unlocked and Unassigned). Locked reports are those currently being dictated.
   - **Report Status**: Search for reports of a particular status. The table below describes each status:

Status	Description
Addended	One or more addenda have been created for a final report. Addenda are reports themselves and the aforementioned statuses apply to them too.
All	Uses all report statuses in the search.
Completed (All) and Completed (Unreported)	Exam has been performed and is ready for dictation.
Draft Draft (A) Draft (S) Draft (T)	Report has been started and saved, but not completed. **A** indicates an addendum. **S** indicates scheduled. Depending on the interface configuration the report might not be eligible to be sent to the RIS until the order is completed. **T** indicates temporary.

Status	Description
Final Final (A) Final (Asgd) Final (S) Final (T)	Report has been completed and signed by an attending. **A** indicates an addendum. **Asgd** indicates an assigned report that is pending an addendum. **S** indicates scheduled. Depending on the interface configuration the report might not be eligible to be sent to the RIS until the order is completed. **T** indicates temporary.
Pending Correction	Report has been dictated and queued for correction.
Pending Signature	Report has been dictated and queued for signature.
Preliminary	Pertains to any report whose status is not final.
Rejected	Appears when a corrected report is returned to an editor by an attending or resident, or when a Pending Signature report is returned to a resident by an attending.
Scheduled	Exam has been scheduled but not yet completed. Sometimes, the exam has been completed but the status has not been updated in the RIS. In this case, reports can be dictated, but are not delivered to the RIS until they are marked complete. Some sites may choose not to allow dictation for scheduled orders.
Temporary	Exam has not been received by *PowerScribe 360 Reporting* so a temporary order has been created. In this case, reports can be dictated, but are not delivered to the RIS until the actual order is received.
Unreported	No report has been dictated for the order.
Wet Read	A "pre-draft" state. Either attending or resident providers can create a wet read report. Any attending or resident provider can promote a wet read report to a Draft status. The text of the wet read is maintained once the report is promoted to Draft status.

- **Section**: Search based on customized site sections. This filter is disabled if you have not selected a site.
- **Ordering Physician**: Search for exams ordered by the selected physician from a site. This filter contains only active physicians who have ordered at least one exam, and is disabled if you have not selected a site. Begin typing the physician's name, and then select the name from the list that appears.

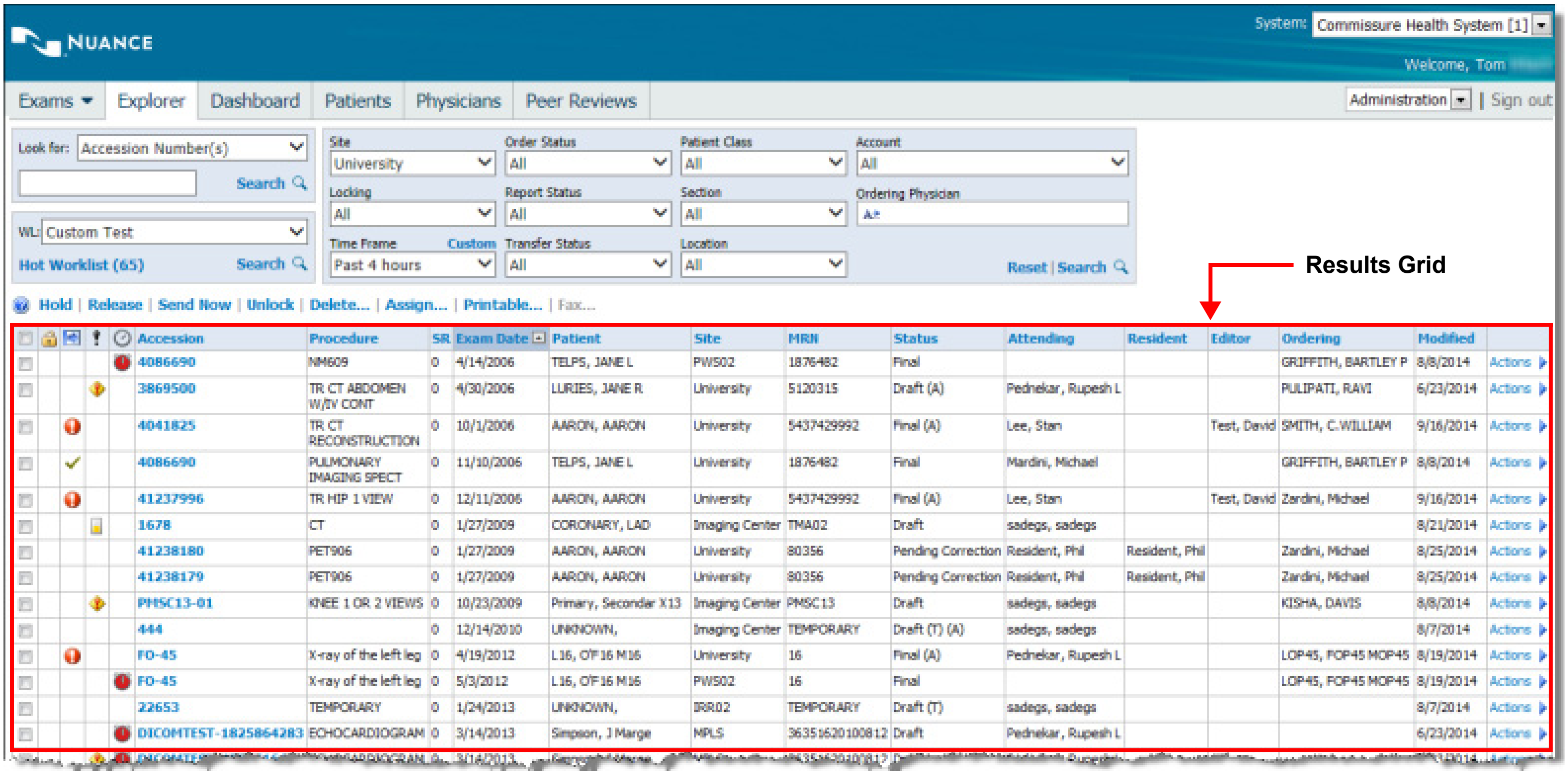


- **Time Frame**: Search for orders or reports based on a period of time. For unreported orders, the filter is based on the time of the exam. For reported orders, the filter is based on the time the report was last modified. This filter includes values such as Past hour, Past 4 hours, Today, Yesterday, Past 2 days, Past 3 days, Past week, Past 2 weeks, Past month, Tomorrow, All Future, and No limit. To specify a range, click **Custom** and then indicate the start and end dates. These dates are inclusive.
- **Transfer Status**: Use this filter to search based on report transfer status (All, Exceptional, Not Ready, Ready, Sent, Rejected, Failed, Held, Queued, Force Send).
- **Location**: Use this filter to search based on the site location associated with the order. This filter is disabled if you have not selected a site.

2. Click **Search**. Any orders or reports that meet your criteria appear in the results grid.

Using the Search Results

The results grid shows all reports and orders that meet your search criteria.



> **Tip:**
>
> - If a report is associated with multiple orders, each order that satisfies the search criteria appears separately in the grid.
> - If the report has an addendum, the properties listed (status, attending, and so on) refer to the addendum.
> - If the search yields more than one page of results, click the page number at the bottom right corner of the grid to navigate to a specific page. To view the entire list, click the small down arrow at the right of the page number list. The arrow then reverts to an up arrow; click the up arrow to see the results one page at a time.
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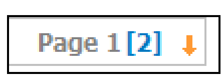
> 
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>
> - Hover your mouse cursor over the page label to see the total number of items found.

- Click any column heading to change the sort order. The software remembers the order you selected. Click the heading again to sort in reverse order.
- If you invoke a worklist that contains a sort order, the results initially appear in this order, and the grid footer displays the order. Apply a different sorting by clicking a column heading.

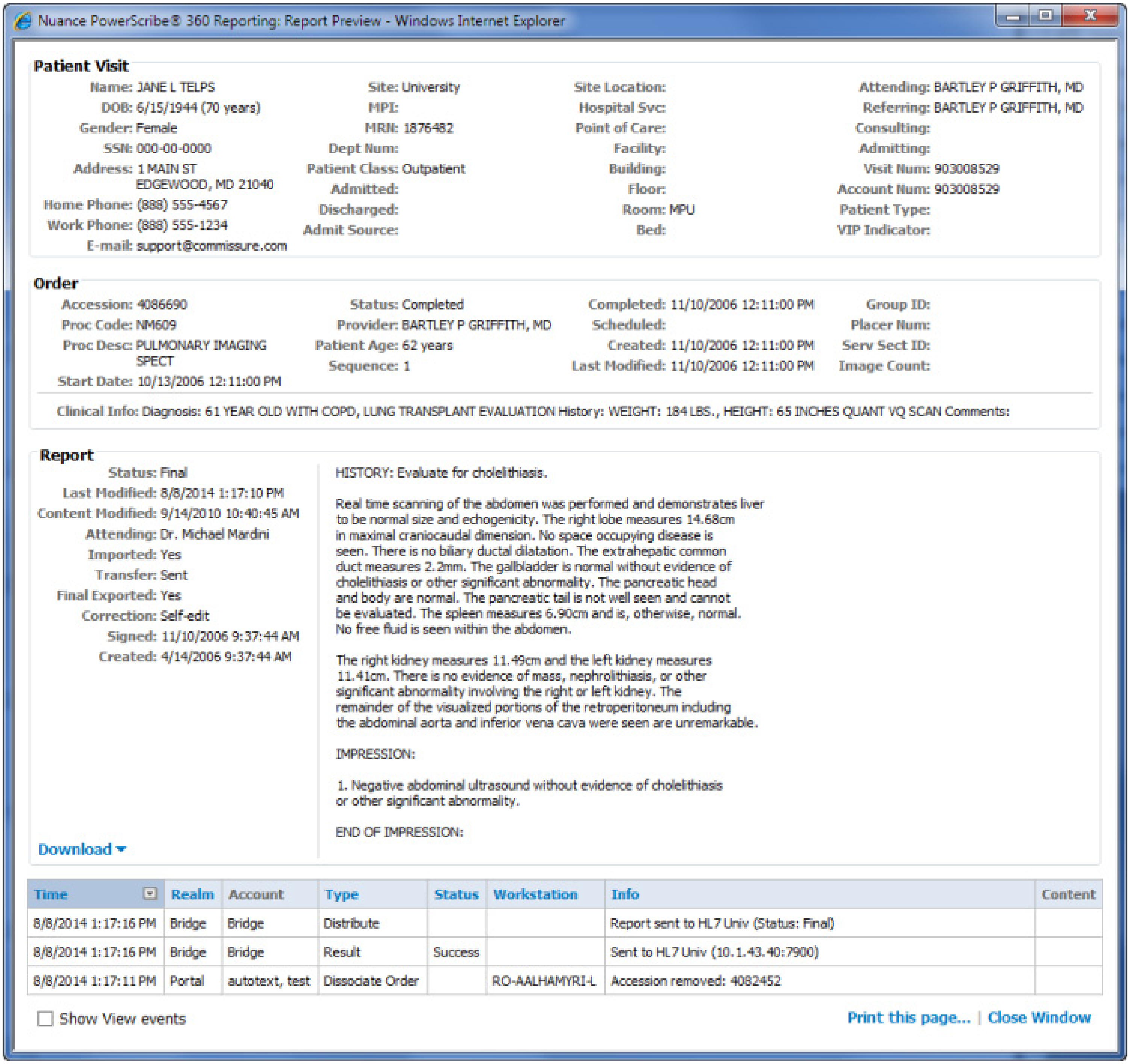
***Note:** There is a limit on the number of orders you can retrieve at one time. This limit is set by default to 500 in the Maximum Explorer Search Records system preference, found on the Explorer Screen tab in the System Preferences window.*

The **Locking and assignment status**, **Report transfer status** and **Priority** columns provide some important information about the reports and orders that appear in the list.

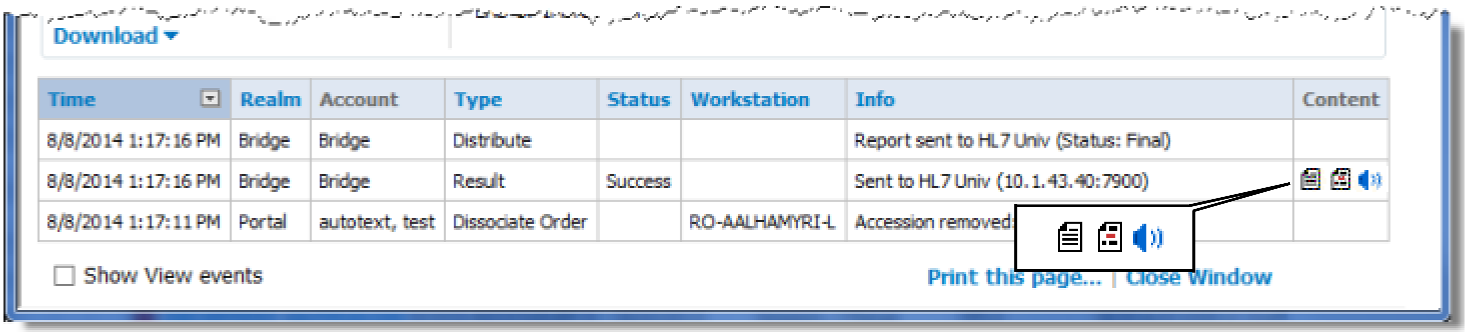
Column	Description
Locking and assignment status	The icon in this column can be either yellow or blue. **Yellow** indicates that the report is open and therefore locked. Hovering your mouse over the lock icon shows who has locked the report. **Blue** indicates an order that is assigned to a radiologist other than the logged-in user. Depending upon a site preference, (page 59) you might, or might not, be able to open this order.
Report transfer status	Hover your mouse over the order's icon to see the status: **Ready**: Report is flagged for inspection; when it is sent depends upon its status and interface options. **Queued:** Report is queued for transmission. **Force Send**: Report is queued for immediate re-transmission. **Sent**: Report has been successfully delivered. **Sent & Edited**: Report has been edited since it was distributed; the version of the report in the RIS/HIS is old and does not match what is in *PowerScribe 360 Reporting*. **Final Exported**: Final report has been successfully transmitted. **Rejected**: The RIS rejected the report. **Failed**: An error occurred. **Held**: An administrator interrupted the transmission.
Priority	This column uses icons to indicate an order's **priority**: No icon: Routine priority **STAT** priority **ASAP** (red) **Timing-critical**; **Callback**; or **Pre-op** (yellow) **Low priority** (green)
TAT Deadline	Indicates reports that have reached or surpassed their turnaround time deadline: Indicates the report is past its deadline. Hover your mouse cursor over the icon to see a tool tip describing how far past the deadline the report is.

Order/Report Preview

Each accession number in **Accession** column of the results grid is a hyperlink to an order and report preview page. This printer-friendly page also provides patient data, exams associated with the report, the report's addenda, and any notes, custom fields, or attachments.



In addition to the preview, there is an audit trail for the order and report, showing when the report was received from the RIS, when it was created, edited, signed, and so on. In the **Content** column of the audit grid, there are icons you can click to download the report content at various steps in the reporting process.



You can download the plain text (*.txt*), the formatted text (*.rtf*), or the dictated audio (*.wav*) of the current report independently of the audited content. These files are available for the number of days specified in the **Keep Content Audit for Final Reports** option in the **System Configuration** dialog box (**Setup** > **System** > **Configuration**). Final reports are typically deleted after a few days so that the database does not grow too rapidly.

Holding, Releasing, or Sending an Order or Report

If you hold a report, it is not sent to the RIS, even if it has been signed as preliminary or final. To make a held report or order eligible for transfer, you must use the **Release** option. You can release only completed orders and final reports that have been held.

Note: *You can release preliminary reports only if you have set the* ***Send Preliminary Results*** *option and the* ***Send Dictated Status Updates*** *option for the Bridge service (****Setup*** *>* ***Bridge****).*

- The **Release** option changes the report's transfer status from Held to Ready, which prepares the report to be examined by the Bridge software. The report may or may not be sent, based on the options configured for the Bridge and for the destination systems.
- The **Send Now** option forces the report to be sent within a few seconds, regardless of the way the Bridge options are configured.

To hold an order or report:

1. Find the report or order you want to hold.
2. Place a check mark next to the report or order.
3. Click **Hold**. You see a confirmation message.
4. Click **OK**. A **Held** icon appears in the **Report Transfer Status** column next to the order or report, indicating that it is being held.

To release an order or report:

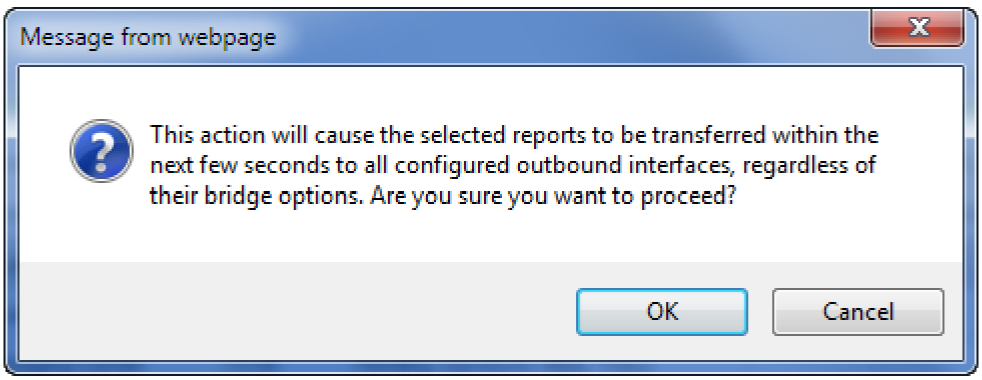
1. Find the report or order you want to release.

   Tip: *Use Held as the Transfer Status filter to search for all held orders and reports.*

2. Place a check mark next to the report or order.
3. Click **Release**. You see a confirmation message.
4. Click **OK**. A **Ready** icon appears in the **Report Transfer Status** column next to the order or report, and the order or report is now eligible to be sent.

To send an order or report immediately:

1. Find the report(s) or order(s) you want to send.
2. Place a check mark next to the report(s) or order(s).
3. Click **Send Now**. You see a confirmation message.



4. Click **OK**. The report or order is transferred.

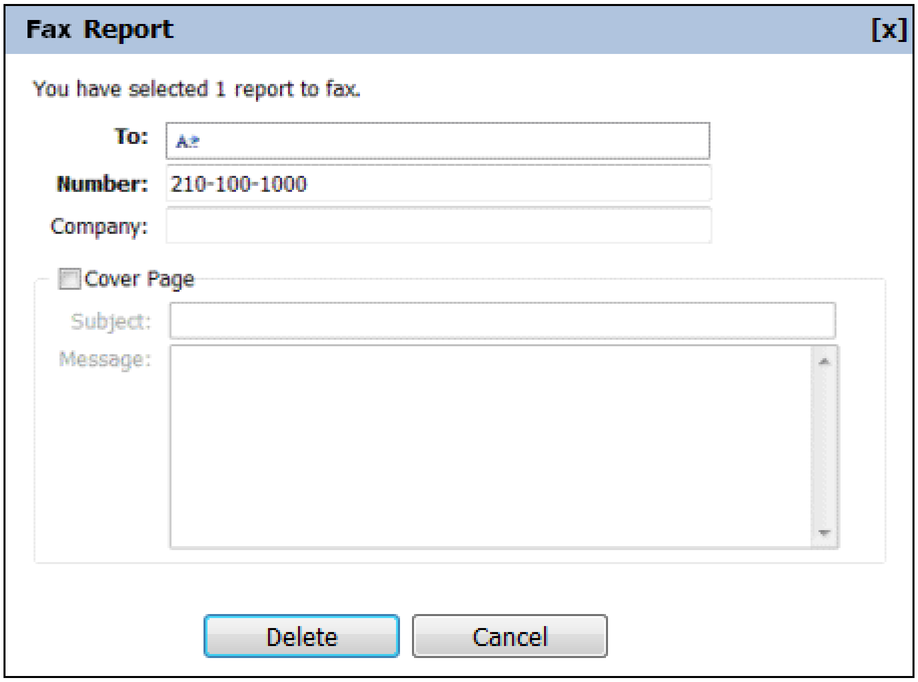
Faxing an Order or Report

You can fax one or more reports or orders from the **Explorer** tab.

To fax orders or reports:

1. Find the report or order you want to fax.
2. Place a check mark next to each item you want to fax.

3. Click **Fax…**. The **Fax Report** dialog box opens.



4. In the **To**: field, select the recipient's name. The default destination is the ordering physician, or the referring physician if the ordering physician name is unavailable.
5. In the **Number**: field, type the fax number.
6. If you want a cover page to accompany the fax, select **Cover Page** and type the Subject and Message that are to appear on the cover page. For information on defining cover page templates, refer to *Creating a Fax Cover Sheet*, beginning on page 514.
7. Click **Send** to send the fax(es).

Unlocking an Order

While a provider is dictating a report on an order, the order is locked to prevent other users from opening it. Later, the order is unlocked. The order might remain locked in some circumstances, such as a loss of network connection. When the provider logs in again when the connection is restored, any locks are automatically cleared. You can use the method below to unlock an order manually, if necessary.

To unlock an order:

1. Find the order you want to unlock.

   Tip: *Use the Locking Status filter to search for all locked orders.*

   The locked order shows a padlock icon next to it.
2. Place a check mark next to the order.
3. Click **Unlock**. The lock is cleared.

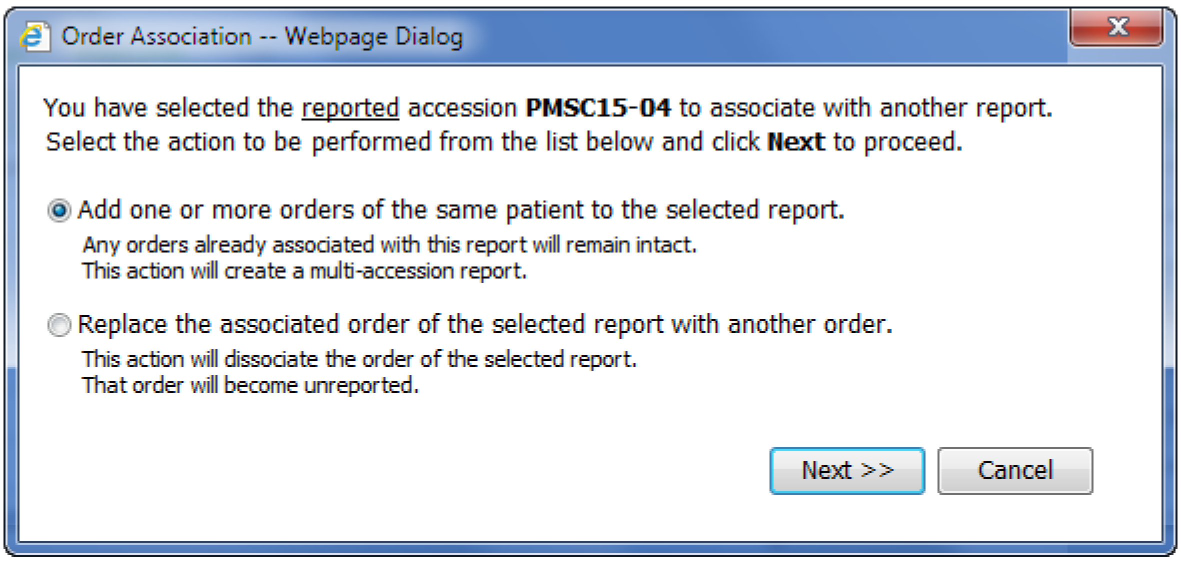
Associating an Order with a Report

Use this feature to associate an order with a report. You can:

- Add another order to a report. Any orders already associated with it remain in place.
- Replace an order with another one.
- Remove an order from a report that has multiple orders.

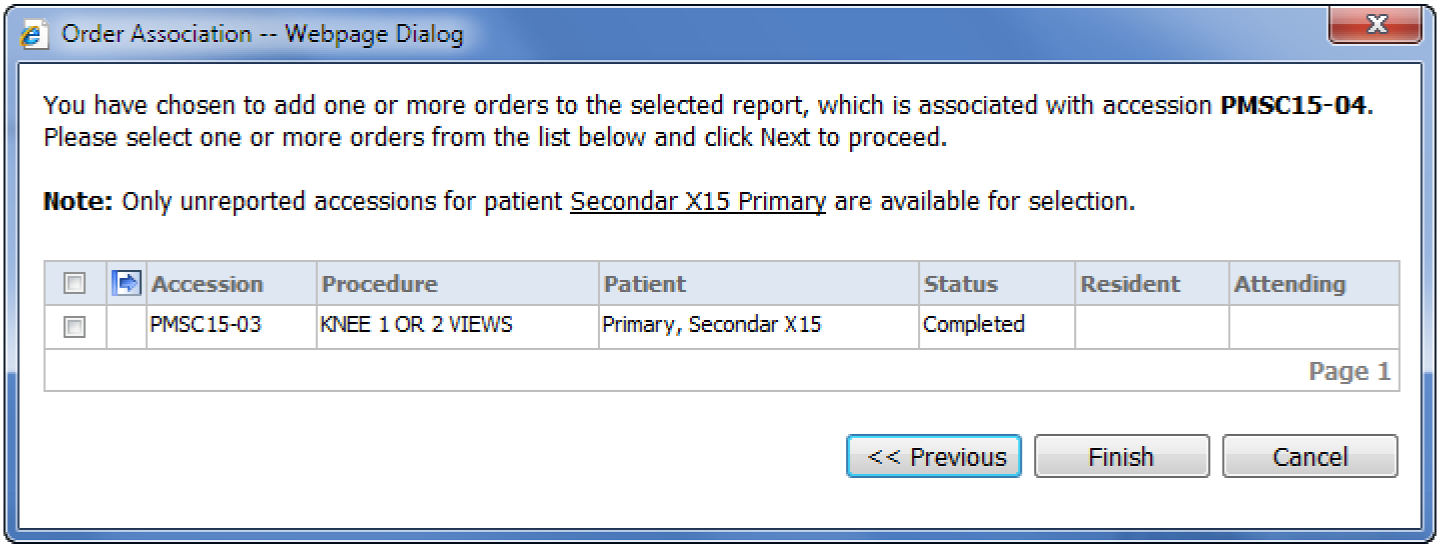
To associate an order with a report:

1. Find the report to which you want to associate an order.
2. Float your mouse cursor over the **Action** link next to the report, and select **Associate...** from the shortcut menu. The **Order Association** dialog box opens.



3. Indicate the action you want to take: Add an order to this report, or replace the existing order with another one. Or, if there are multiple orders associated with a report, you have the option of removing the currently selected order.

4. Click **Next** >>. A list of unreported accessions for this patient is displayed.

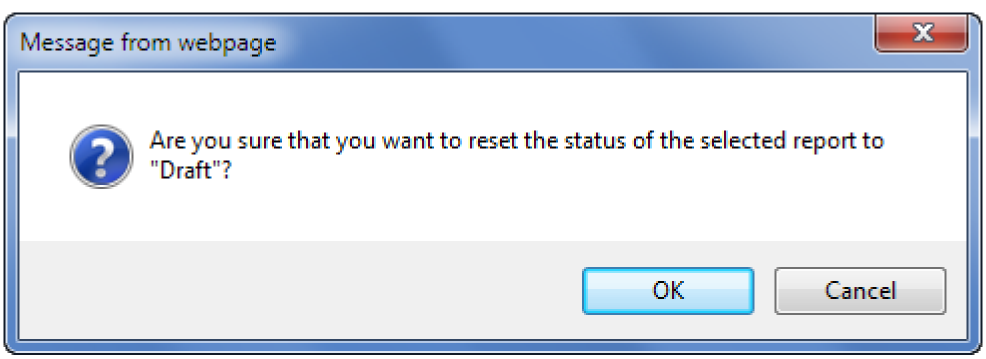


5. Select the order you want to associate with the report and click **Next** >>. A confirmation message indicates the association has been made, or removed, depending on the action.
6. Click **Close**. The original list is updated to reflect your change.

Resetting a Report's Status to 'Draft'

To reset a report to 'draft':

1. Find the report whose status you want to reset.
2. Float your mouse cursor over the **Action** link next to the report, and select **Reset to draft** from the shortcut menu. A confirmation message appears.

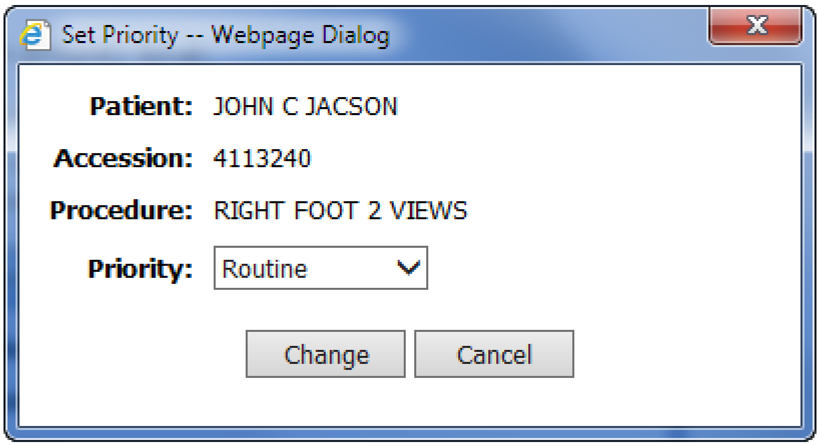


3. Click **OK**. The report's status reverts to 'draft.'

Modifying an Order's Priority Level

To modify an order's priority level:

1. Find the order whose priority you want to reset.
2. Float your mouse cursor over the **Action** link next to the order, and select **Set Priority …** from the shortcut menu. The **Set Priority** dialog box opens.



3. Select the priority level you want to assign to this report.
4. Click **Change**. The report's priority is changed to the level you selected. An icon appears in the **Priority** column to show the priority:

Routine:	No icon
Low priority:	
Timing-critical, callback, or pre-op:	
ASAP:	
STAT:	

Modifying a Report's Diagnosis Codes

This feature allows you to set diagnosis codes for reported orders.

To modify a report's diagnosis codes:

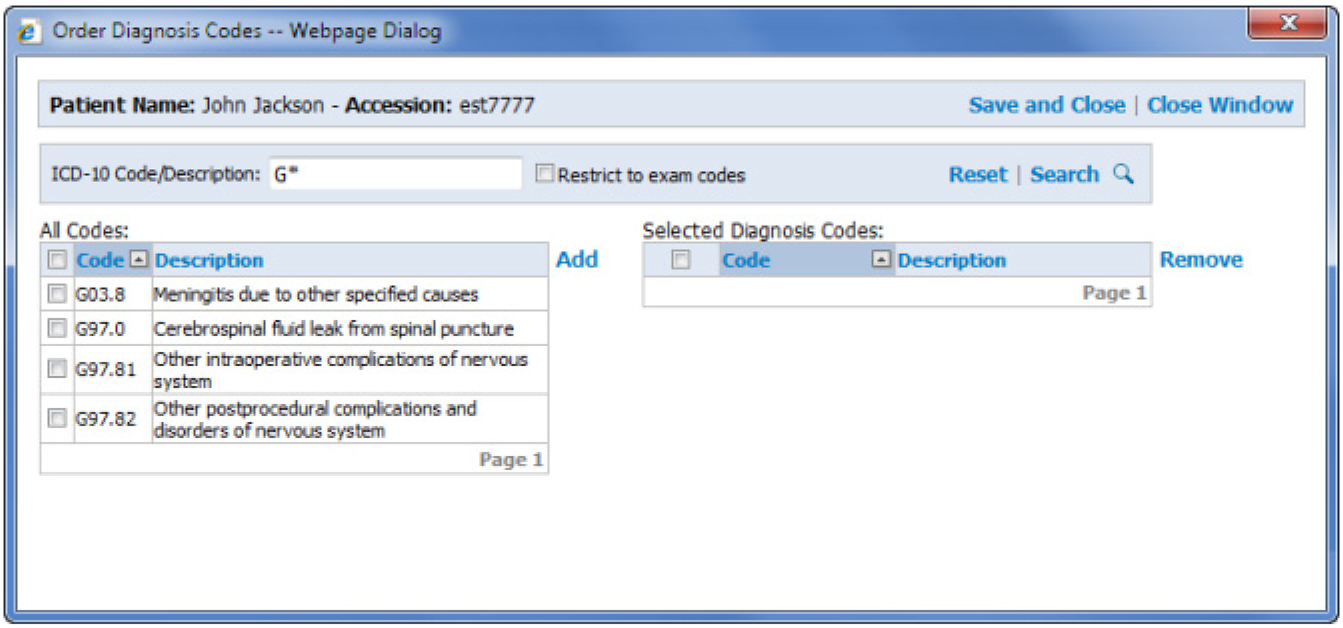
1. Find the report whose diagnosis codes you want to modify.
2. Float your mouse cursor over the **Action** link next to the order, and select **Edit Diagnosis Codes…** from the shortcut menu. The **Order Diagnosis Codes** dialog box opens.

3. Find the diagnosis code you want to assign to the report.

   To find a code:

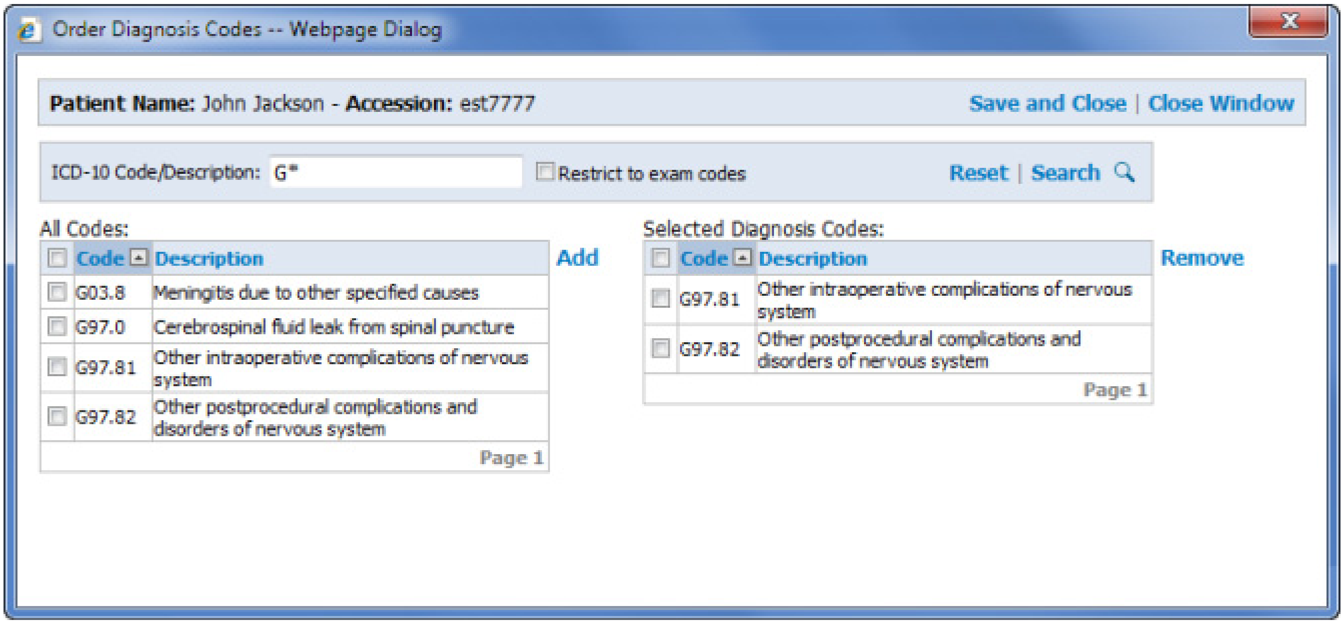
   a. Type all or part of the code or its description in the **Diagnosis Code/Description** field. You can use an asterisk as a wild-card character.

   b. Click **Search** to find the codes. Select the **Restrict to exam codes** option if you want to search only amongst exam codes, and not diagnostic codes. The codes appear in the **All codes** list at the left.



4. Place a check mark next to each code you want to assign to this order. Or, place a check mark in the heading to select all the codes in the list.

5. Click **Add**. The selected codes are added to the **Selected Diagnosis Codes** list at the right. To remove a code, place a check mark next to it and click **Remove**.



6. Click **Save and Close** to assign the codes to the order.
7. Repeat Steps 3 through 6 until you have added all the desired codes to the order.
8. Click **Close Window**.

Modifying an Unreported Order or Report's Custom Field Values

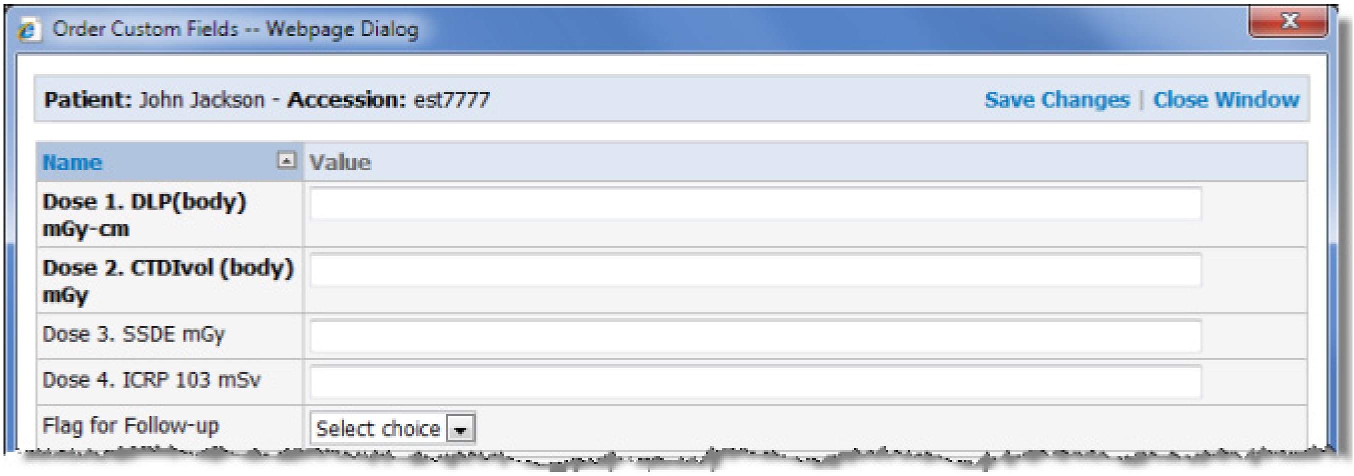
Note: *For more information on custom fields, see* *Custom Fields, beginning on page 325.*

You can change the values the radiologist or other user has inserted in the custom fields in an unreported order or report.

To modify the custom fields:

1. Find the order or report whose custom field values you want to change.

2. Float your mouse cursor over the **Action** link next to the order or report, and select **Edit Custom Fields…** from the shortcut menu. The **Order Custom Fields** dialog box opens.

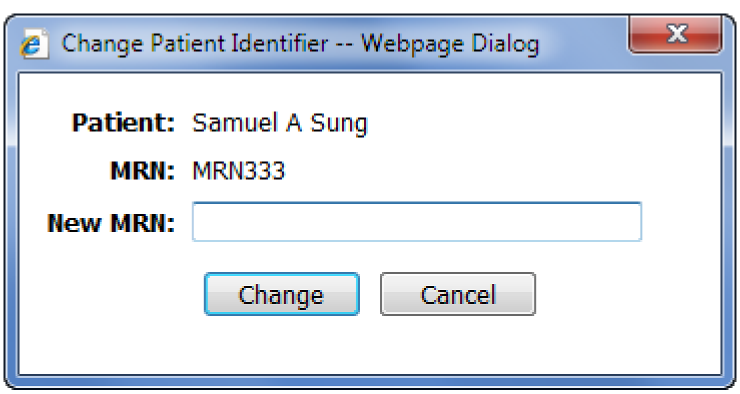


3. Enter or select the appropriate value for each of the custom fields in the order or report.
4. Click **Save Changes**.
5. Click **Close Window** to return to the report list.

Changing a Patient's MRN

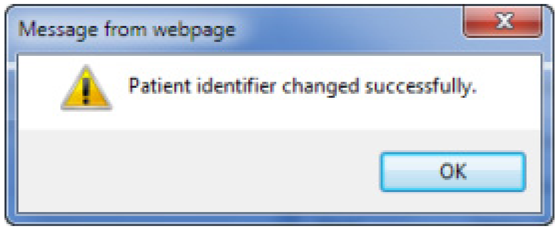
To change a patient's MRN:

1. Find the order or report in which you want to change the patient's MRN.
2. Float your mouse cursor over the **Action** link next to the report, and select **Change Patient MRN** from the shortcut menu. The **Change Patient Identifier** dialog box opens.



3. Type the patient's new MRN.

4. Click **Change**. A notification message appears.



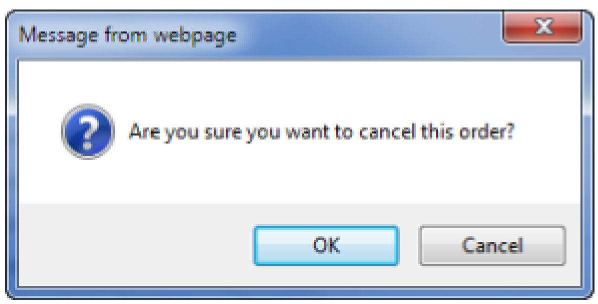
5. Click **OK**.

Canceling an Order

Because some RIS do not send order cancellations through HL7, you can set the status of an exam to **Canceled** to keep the data synchronized between *PowerScribe 360 Reporting* and your RIS. You can cancel only unreported orders whose status is not Temporary or Entered.

To cancel an order:

1. Find the order you want to cancel.
2. Float your mouse cursor over the **Action** link next to the order, and select **Cancel** from the shortcut menu. A confirmation message appears.



3. Click **OK**. The order's status changes to **Canceled**.

Printing an Order or Report

You can print any order or report in the system; the report will appear in the same format as it does when the radiologist prints it from the *PowerScribe 360 Reporting* client application. The report will include any headers, footers, page numbering, or other features you defined in the default print template for the system, site, or site location. For more information on setting up print templates, refer to *Creating a Print Template*, beginning on page 501.

To download a printable report:

1. Find the report(s) you want to print.
2. Place a check mark next to each report you want to print.
3. Click **Printable…**. The standard **File Download** window opens.
4. If you want to view the report(s), click **Open**. The report opens in a Word or WordPad window, depending on the file type. From here, you can save or print the document.

   OR

   To save a copy of the report(s), click **Save**. A standard **Save As** window opens. Navigate to and select the folder where you want to save a Word file containing the report(s), and click **Save**. The file is stored at the location you specified.

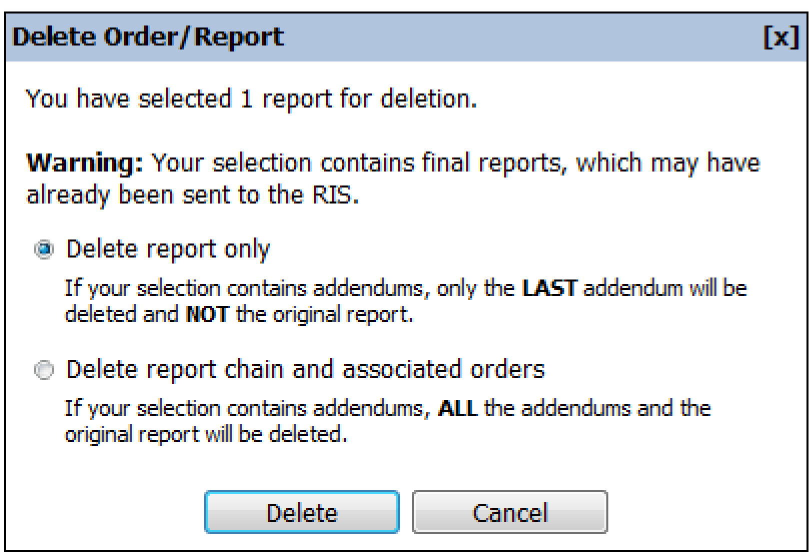
Deleting Reports and Orders

Caution: *Deleting reports or orders is not recommended and should not be done except in rare cases where your RIS is not synchronized with your PowerScribe 360 Reporting system.*

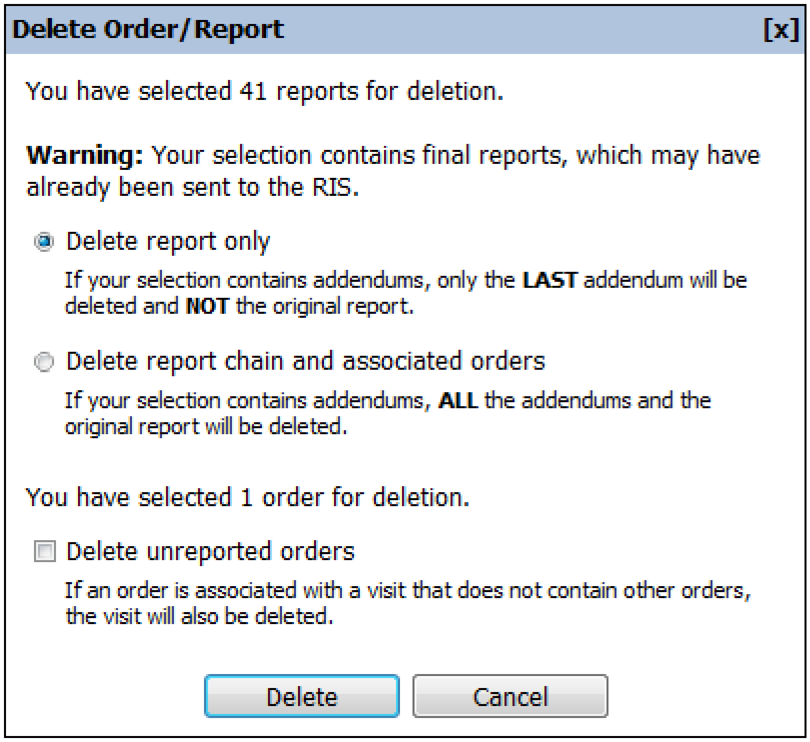
Deleting a report or an order removes it from the *PowerScribe 360 Reporting* system, but does not remove it from the RIS. In most cases, you do not need to delete reports or orders from the system. If an unusual situation requires you to delete a report or order, follow the procedure below.

To delete a report or order:

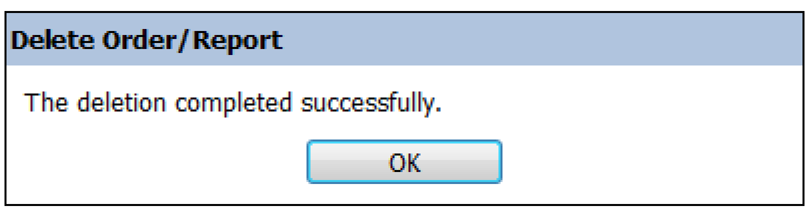
1. Find the order or report you want to delete.
2. Place a check mark next to the order or report.
3. Click **Delete**. A confirmation message appears.



The options you see depend on the order or report you selected. For example, if you delete an order associated with a visit that has no other unreported orders, you have an option to delete the visit:



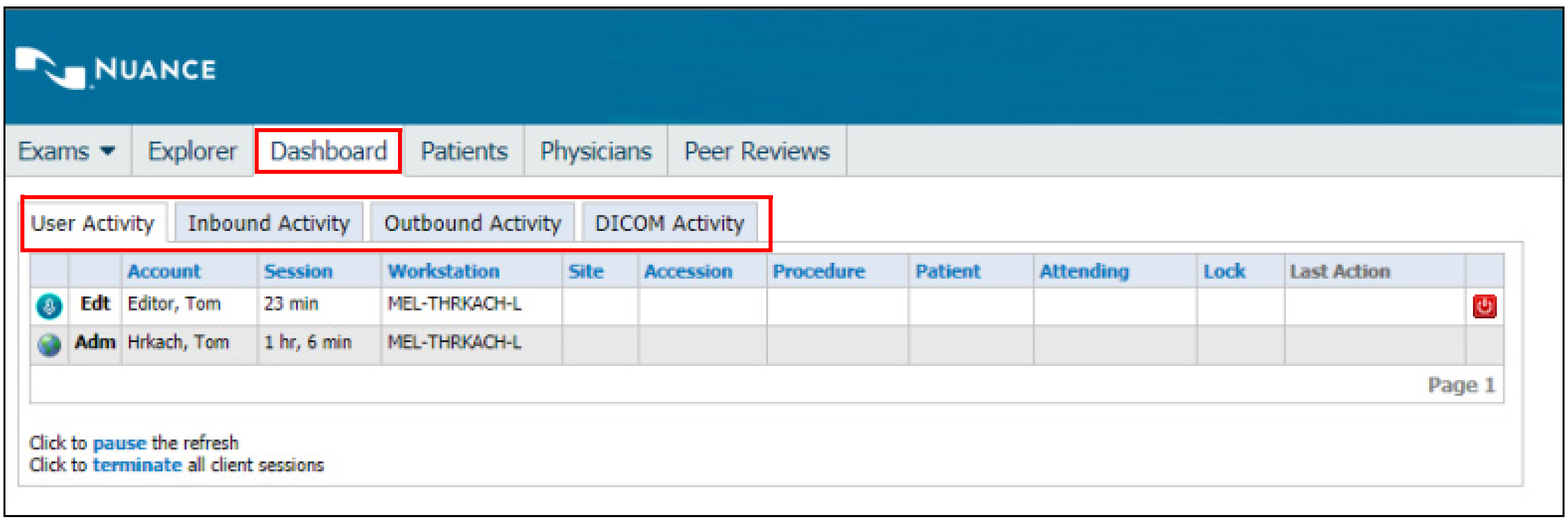
4. Select the appropriate option(s) and click **Delete**. A message indicates the successful deletion of the item(s).



Using the Dashboard Tab

The **Dashboard** tab in the **Exams** group provides a real-time view of exam activity in the system. It has three tabs, each showing a different set of exam-related activities.

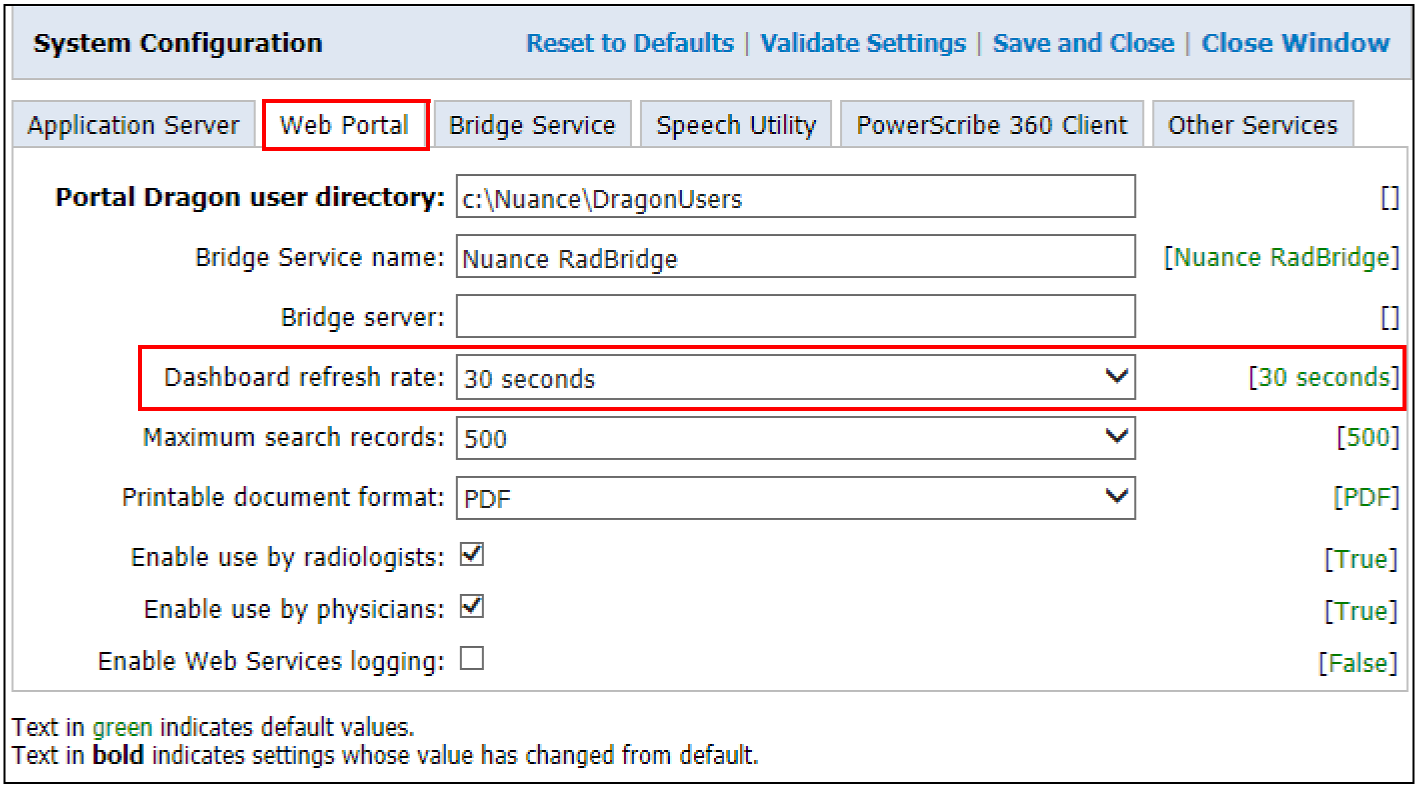
- **User Activity**: Shows all users currently logged into the system, including Portal users, how long they have been logged in, the workstations they are using, the exams on which they are working, and the last action taken on these exams.
- **Inbound Activity**: Shows all recent messages received from the RIS.
- **Outbound Activity**: Shows all recent messages sent to the RIS.
- **DICOM Activity**: If you purchased the DICOM option, this tab is available.



The User Activity tab contains two actions that you can perform. In the far right column of the list, a red and white icon allows you to terminate a client session. Or, in the lower-left portion of the window, you can click the blue **terminate** link to terminate all open client sessions.

Dashboard Refresh Rate

Use the **Configuration** page in the **Setup** group to specify how often the data is updated on the Dashboard. The default is every 30 seconds.



Introduction to Templates

You can create print, fax, and cover sheet templates for your facility's needs. You can design templates for the entire system, for individual sites, and for locations within sites. If your facility is converting from the *RadWhere* application, you can use your existing *RadWhere* templates in *PowerScribe 360 Reporting*.

Templates allow your reports to have a consistent appearance when they are printed or faxed. If you assign a template to the system, all reports printed in the system use that template, unless you also assign templates to individual sites or locations within sites. With a template, a report has the same appearance whether a radiologist prints it from the client application or an administrator prints it from the **Explorer** tab in the *Administrator Portal*.

To tailor a template to your facility's needs, you can use advanced features such as merge fields, tabs, page numbering, headers, footers, tables, and embedded graphics such as logos. And, you can design a template to show a different header or footer on the first page than on the other pages. (Nested tables and separator lines are not supported.)

If desired, you can design separate templates with different headers and footers for each site or location; for example, you might want reports to display a different department name and address at the top of the page depending on the site or location. You can create the same or different templates for printing and faxing.

You can create and edit simple templates in WordPad; for the more advanced features, you will need to use Microsoft Word. You must save print and fax templates as *.rtf* files, not as *.doc* files, before you upload them to your system in the Portal. You can use any *.rtf* file as a basis for a new template.

Note: *Cover sheet templates are not .rtf files; these have a .cov extension and you can create them only in the Microsoft Fax Cover Page Editor utility that comes with Windows.*

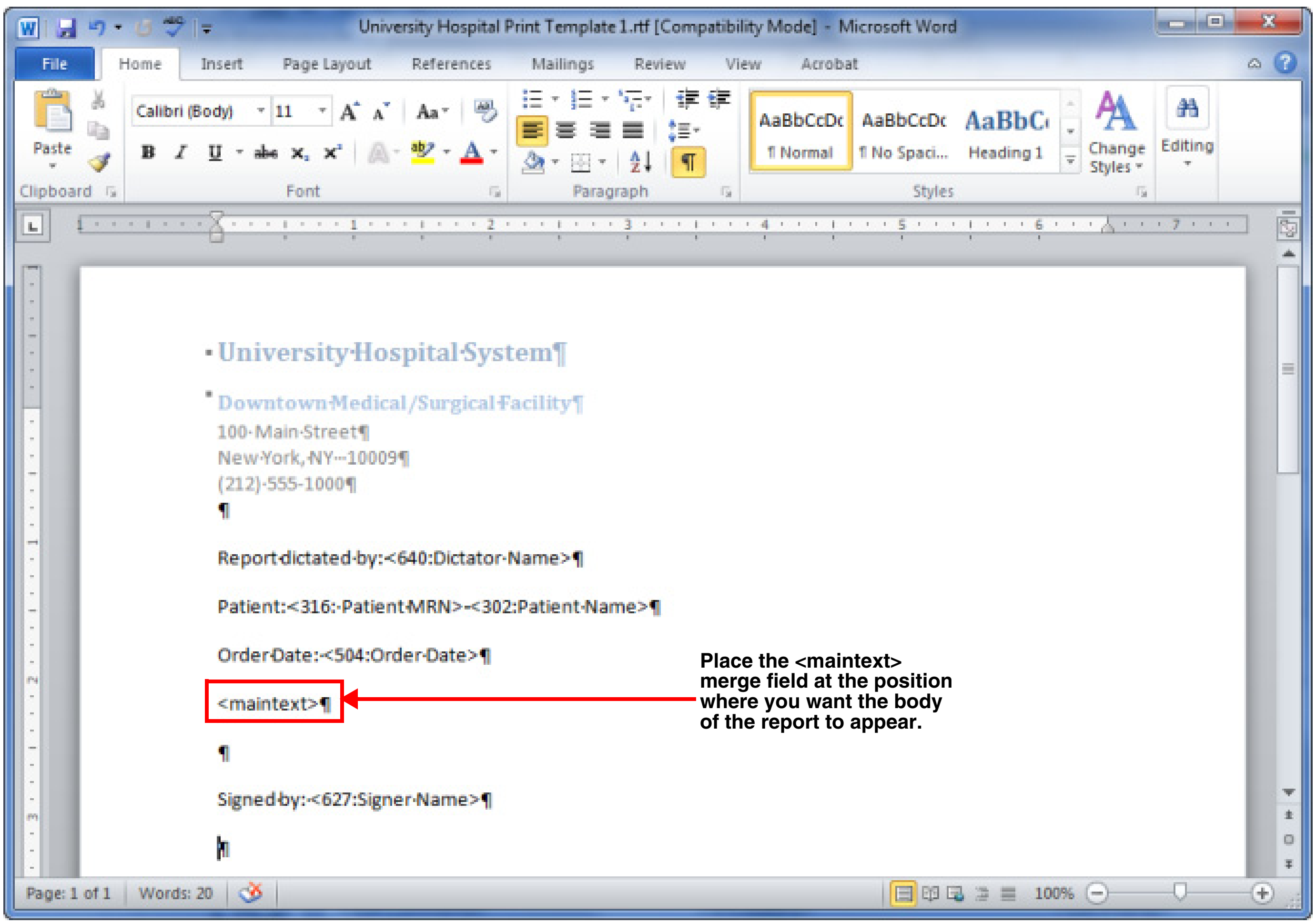
Use the procedures below to create and edit templates that will be available to all users in the system, for individual sites, or for locations within sites.

Creating a Print Template

To add a new print template at the system or site level, you must first create the template as an *.rtf* file in Microsoft Word or WordPad. Once you have created it, you must add it to your *PowerScribe 360 Reporting* system.

To create the template:

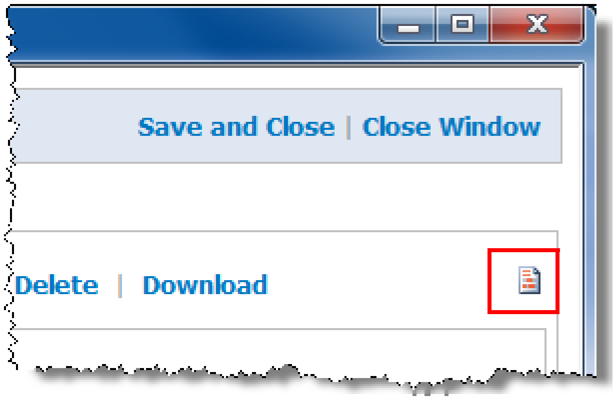
1. Create the template file in Microsoft Word or WordPad.
   - Use Word's advanced features to add headers, footers, page numbering, and so on, if desired.
   - A print or fax template must, at the minimum, contain the <*maintext*> merge field. This field will contain the text of the report; you must place this field at the position where you want the body of the report to appear.
   - You can add other merge fields such as the patient name, patient MRN, attending name, and so on. Below is an example of a print template with merge fields.



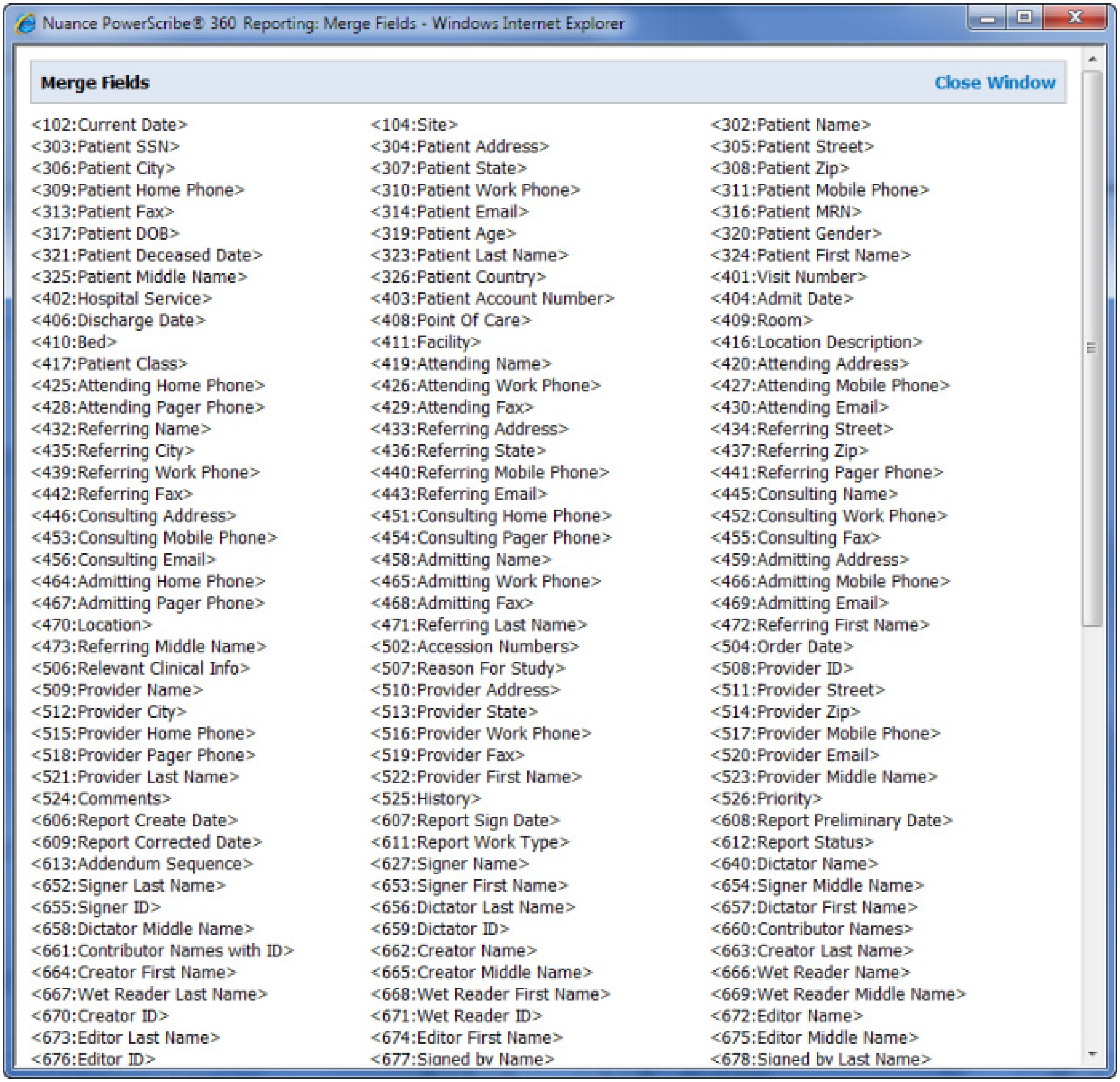
To see a list of all available merge fields:

a. On the **System** or **Sites** tab in the **Setup** group, click **Templates…**.

b. Click the icon at the upper right of the **Print Template** tab.



A window showing the list of merge fields opens.



Nuance PowerScribe® 360 Reporting: Merge Fields - Windows Internet Explorer

Merge Fields Close Window

<102:Current Date>	<104:Site>	<302:Patient Name>
<303:Patient SSN>	<304:Patient Address>	<305:Patient Street>
<306:Patient City>	<307:Patient State>	<308:Patient Zip>
<309:Patient Home Phone>	<310:Patient Work Phone>	<311:Patient Mobile Phone>
<313:Patient Fax>	<314:Patient Email>	<316:Patient MRN>
<317:Patient DOB>	<319:Patient Age>	<320:Patient Gender>
<321:Patient Deceased Date>	<323:Patient Last Name>	<324:Patient First Name>
<325:Patient Middle Name>	<326:Patient Country>	<401:Visit Number>
<402:Hospital Service>	<403:Patient Account Number>	<404:Admit Date>
<406:Discharge Date>	<408:Point Of Care>	<409:Room>
<410:Bed>	<411:Facility>	<416:Location Description>
<417:Patient Class>	<419:Attending Name>	<420:Attending Address>
<425:Attending Home Phone>	<426:Attending Work Phone>	<427:Attending Mobile Phone>
<428:Attending Pager Phone>	<429:Attending Fax>	<430:Attending Email>
<432:Referring Name>	<433:Referring Address>	<434:Referring Street>
<435:Referring City>	<436:Referring State>	<437:Referring Zip>
<439:Referring Work Phone>	<440:Referring Mobile Phone>	<441:Referring Pager Phone>
<442:Referring Fax>	<443:Referring Email>	<445:Consulting Name>
<446:Consulting Address>	<451:Consulting Home Phone>	<452:Consulting Work Phone>
<453:Consulting Mobile Phone>	<454:Consulting Pager Phone>	<455:Consulting Fax>
<456:Consulting Email>	<458:Admitting Name>	<459:Admitting Address>
<464:Admitting Home Phone>	<465:Admitting Work Phone>	<466:Admitting Mobile Phone>
<467:Admitting Pager Phone>	<468:Admitting Fax>	<469:Admitting Email>
<470:Location>	<471:Referring Last Name>	<472:Referring First Name>
<473:Referring Middle Name>	<502:Accession Numbers>	<504:Order Date>
<506:Relevant Clinical Info>	<507:Reason For Study>	<508:Provider ID>
<509:Provider Name>	<510:Provider Address>	<511:Provider Street>
<512:Provider City>	<513:Provider State>	<514:Provider Zip>
<515:Provider Home Phone>	<516:Provider Work Phone>	<517:Provider Mobile Phone>
<518:Provider Pager Phone>	<519:Provider Fax>	<520:Provider Email>
<521:Provider Last Name>	<522:Provider First Name>	<523:Provider Middle Name>
<524:Comments>	<525:History>	<526:Priority>
<606:Report Create Date>	<607:Report Sign Date>	<608:Report Preliminary Date>
<609:Report Corrected Date>	<611:Report Work Type>	<612:Report Status>
<613:Addendum Sequence>	<627:Signer Name>	<640:Dictator Name>
<652:Signer Last Name>	<653:Signer First Name>	<654:Signer Middle Name>
<655:Signer ID>	<656:Dictator Last Name>	<657:Dictator First Name>
<658:Dictator Middle Name>	<659:Dictator ID>	<660:Contributor Names>
<661:Contributor Names with ID>	<662:Creator Name>	<663:Creator Last Name>
<664:Creator First Name>	<665:Creator Middle Name>	<666:Wet Reader Name>
<667:Wet Reader Last Name>	<668:Wet Reader First Name>	<669:Wet Reader Middle Name>
<670:Creator ID>	<671:Wet Reader ID>	<672:Editor Name>
<673:Editor Last Name>	<674:Editor First Name>	<675:Editor Middle Name>
<676:Editor ID>	<677:Signed by Name>	<678:Signed by Last Name>

You can copy any merge field from the list to insert it in the document. For example, to insert the visit number, copy the field **<401:Visit Number>** and paste it at the position in your template where you want the visit number to appear. Although you can use the field number alone or the field name alone, it is recommended that you copy the field exactly as it appears, including the brackets.

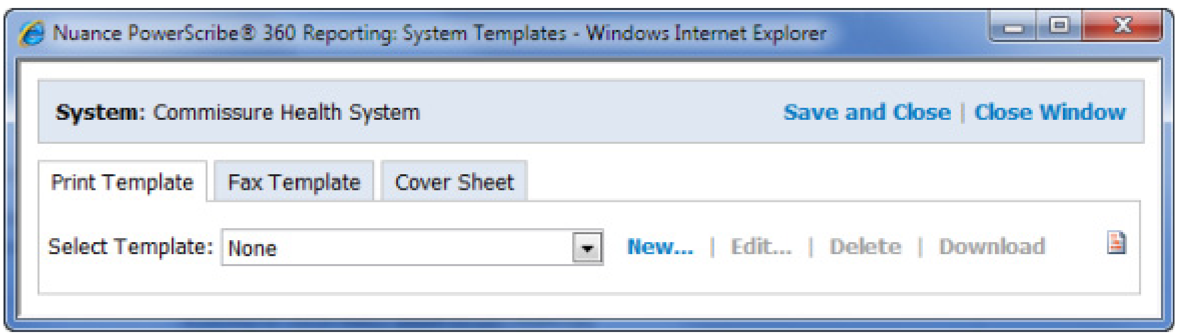
> ***Tip:*** *To insert a custom field, use this format: <10000:Custom:Custom Field Name>. For example, if the custom field name is Radiation Dose, type <10000:Custom:Radiation Dose>.*

Appendix A in this manual also contains a list of the merge fields you can use in your print templates.

2. When you have finished creating the template, save it as an *.rtf* file. Make a note of the path and folder location where you saved the file. Then continue with the procedure below to upload the template to your system.

To add a print template to the system, site, or location:

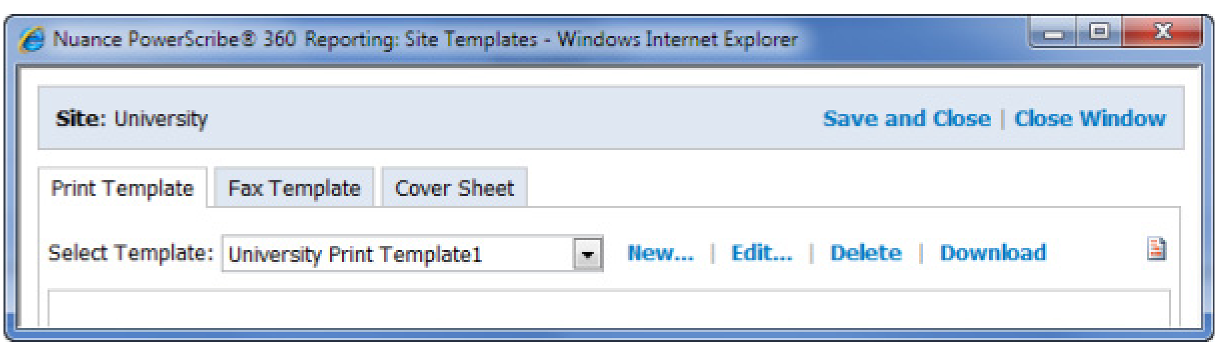
1. To add a print template at the system level:
   a. On the **System** tab in the **Setup** group, click **Templates**.
   b. Select the **Print Template** tab.



OR

To add a print template at the site level:

a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.
b. Click **Templates**.
c. Select the **Print Template** tab.

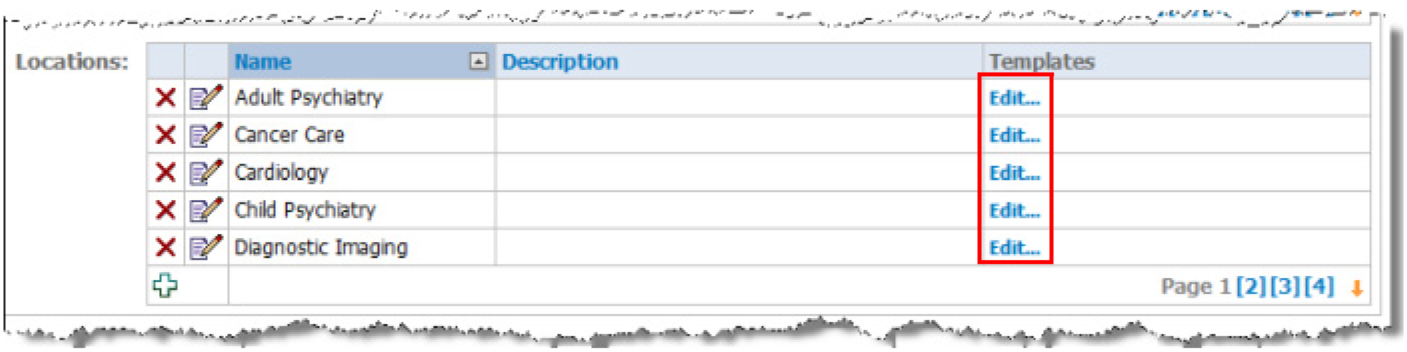


OR

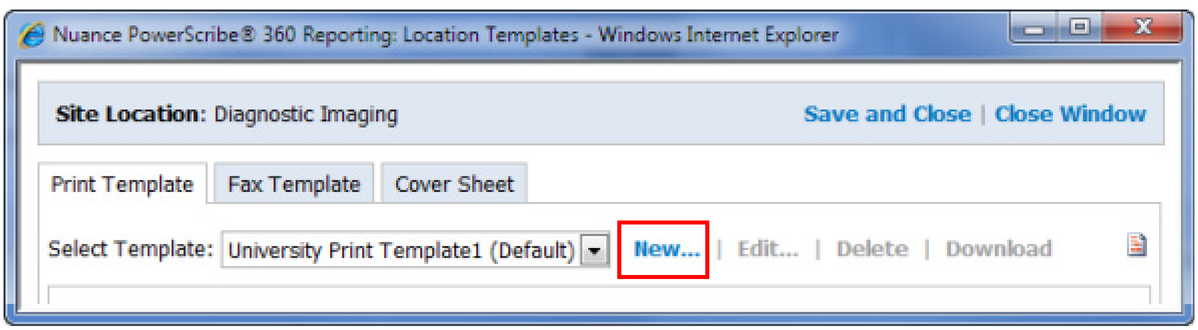
To add a print template at the site location level:

a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

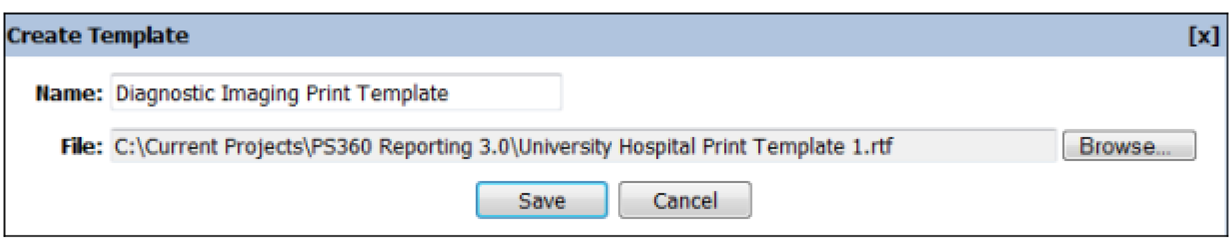
b. Next to the location for which you want to add a template, click **Edit** in the **Templates** column.



2. Click **New**.

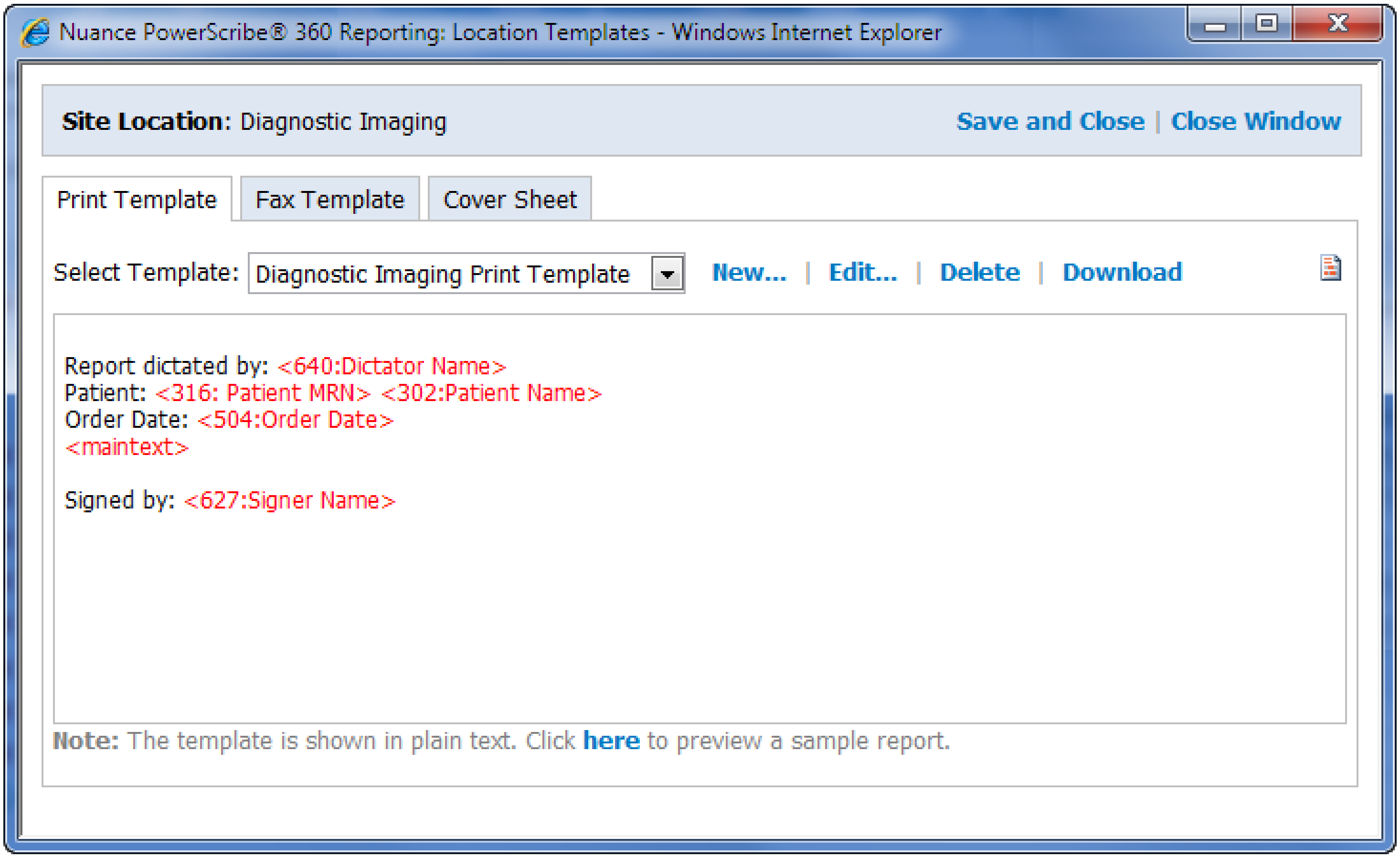


The **Create Template** dialog box opens.



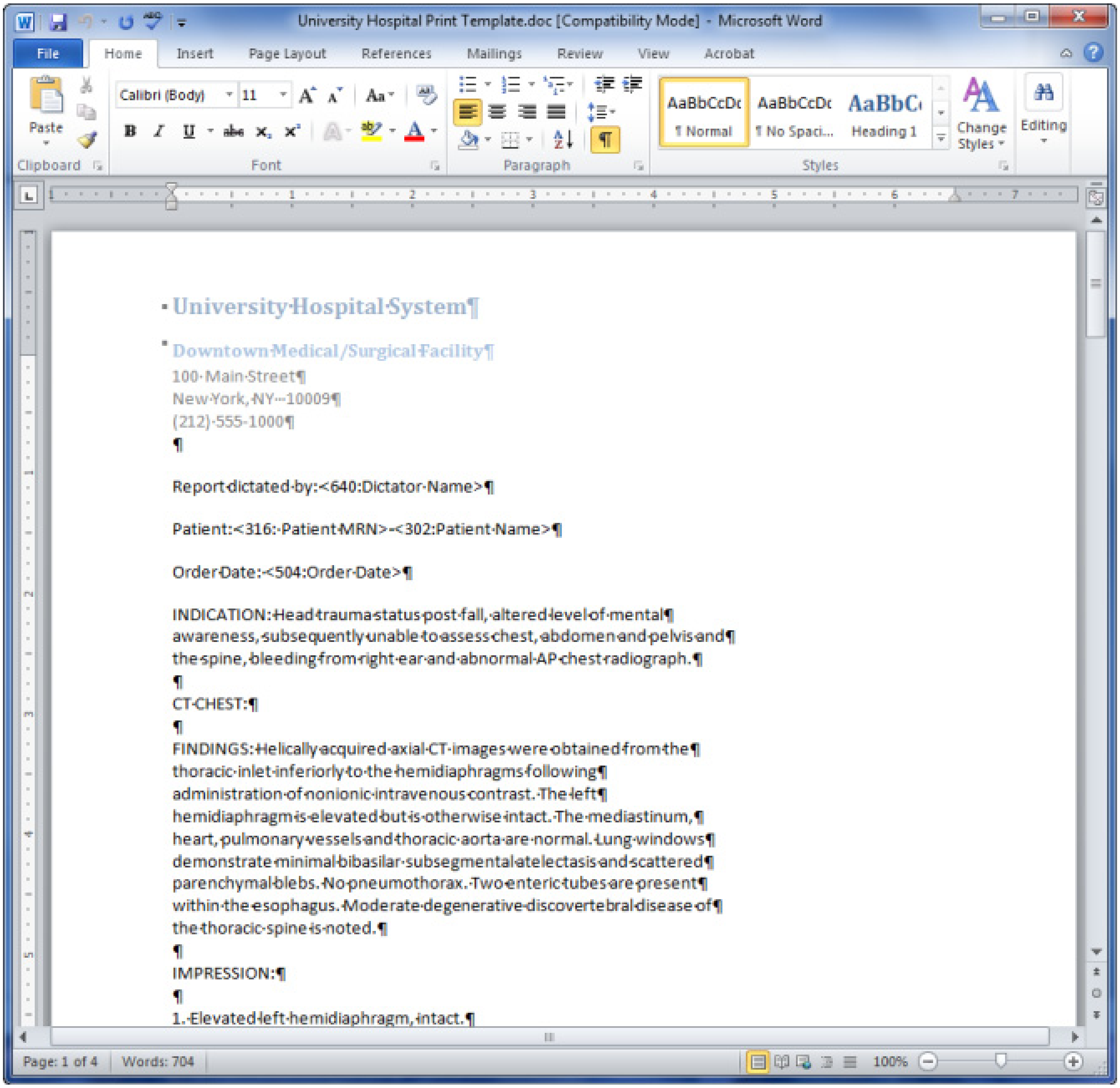
3. Type a **Name** for the new template.
4. Click **Browse**.
5. Navigate to and select the file you created in Word or Wordpad. Click **Open**. The path and file name appear in the **File** field.

6. Click **Save**. The template appears in the plain-text preview window.



7. To preview the template as it will appear with a report, click the link below the editing window. At the prompt, click **Open**. A sample report appears in a preview window.

(This preview does not display any real data in the merge fields, but shows how a typical report might appear in the template.)



Close the preview window when you have finished viewing the sample report.

8. Click **Save and Close** to save the template on your server.

Show Addendum at the Top of Printed Reports

Merge fields are available for printable templates that allow a report's addenda to appear at the top of the report, rather than near the end, allowing report recipients to be alerted immediately to the most recent information about a patient.

Note: *The merge fields can also be used to create other highly customized print templates, including control over the headers and separators that appear with each section.*

Print Template Merge Fields

Simple Approach

<maintextreverse> - Prints report with addendums at top in reverse chronological order, using hard coded headers and separator lines between each addendum and the original report.

Complex Approach (for customers who want more control of separators)

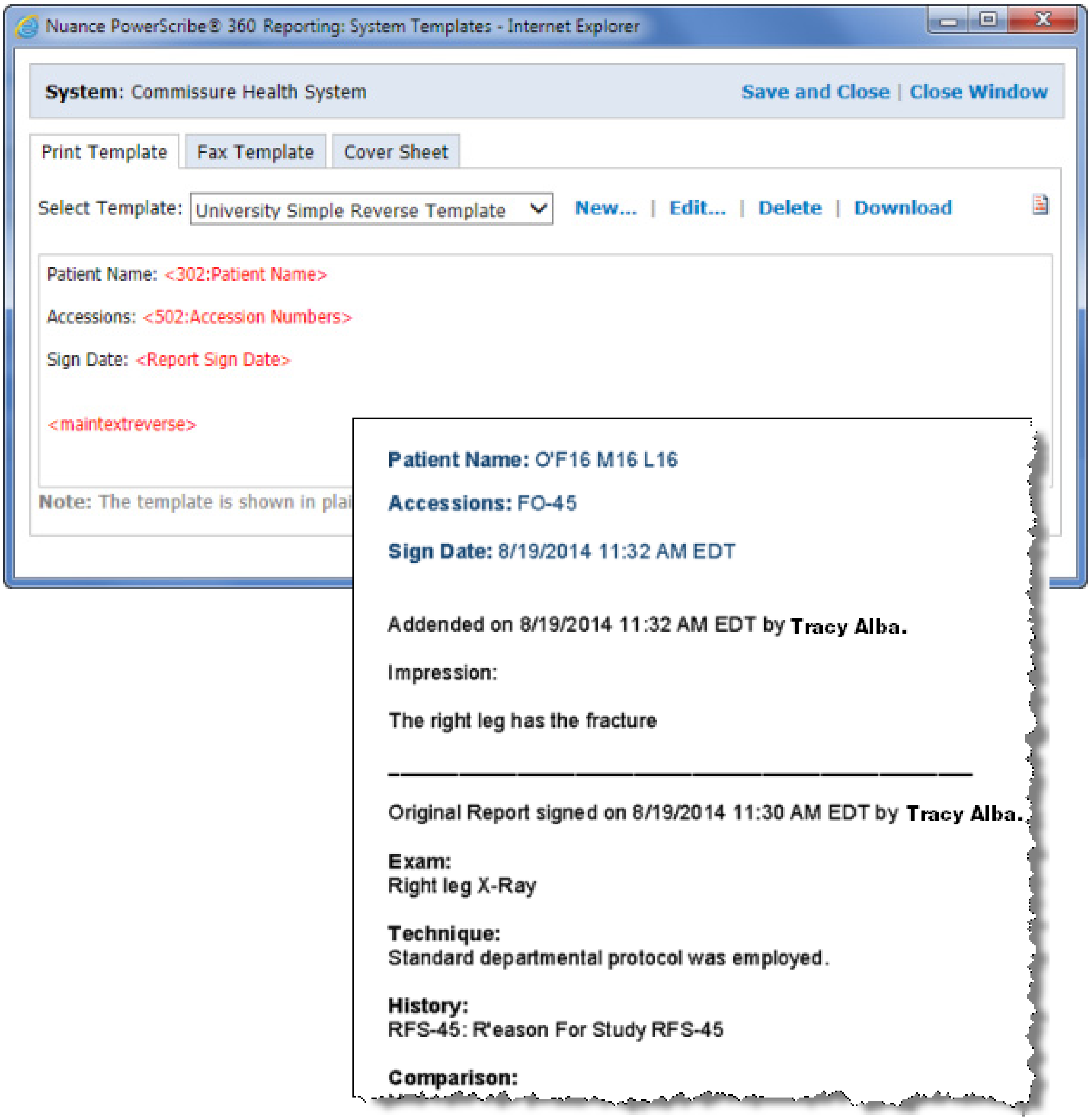
<addendum-start>	**<addendum-end>**	**<addendumtext>**
<originalreport-start>	**<originalreport-end>**	**<originalreporttext>**
<report-start>	**<report-end>**	**<reporttext>**

Notes:

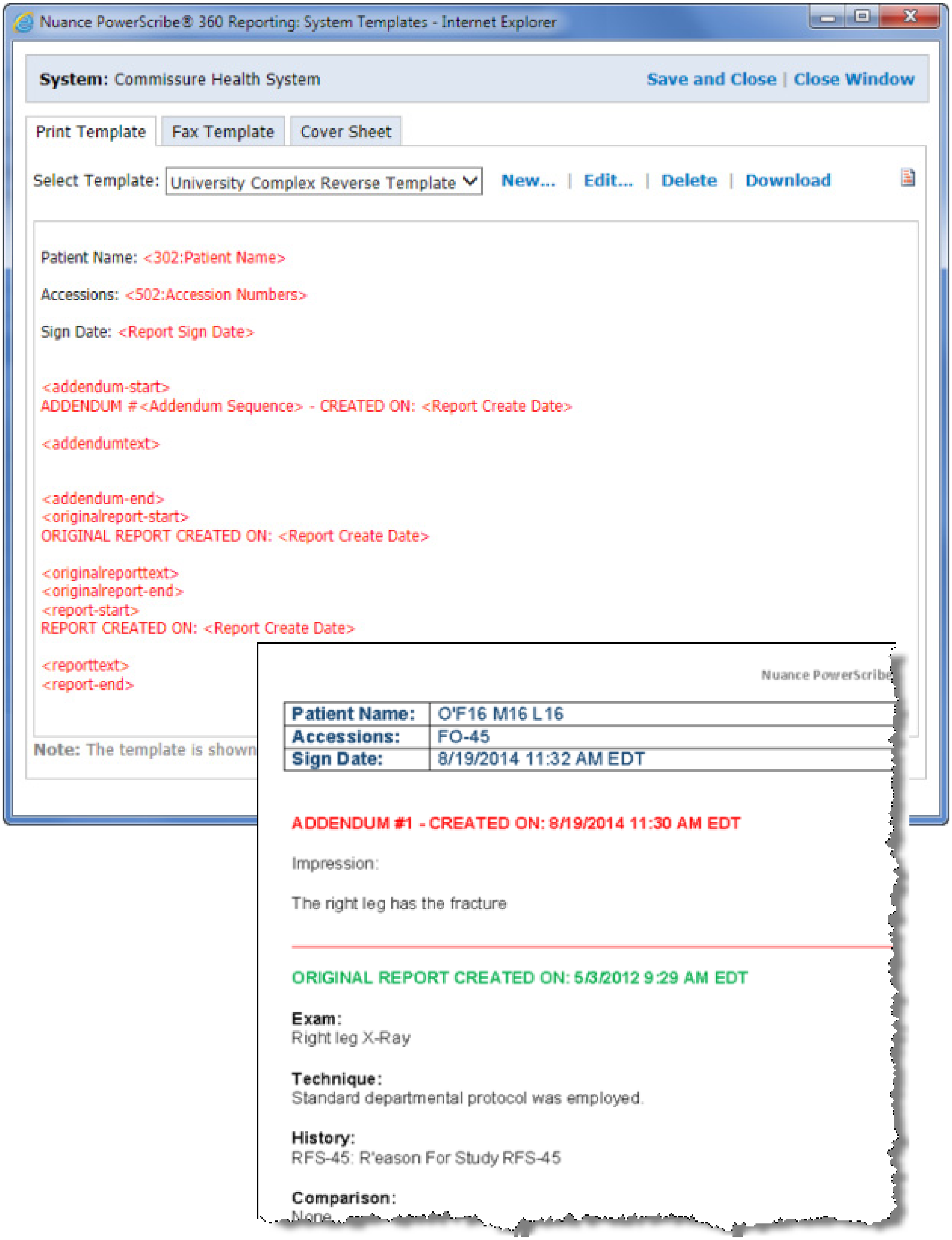
- *<originalreport> may be used as a synonym for <originalreporttext>, <report> is a synonym for <reporttext>, and <addendum> is a synonym for <addendumtext>.*
- *<originalreportextt> refers to the original report only when an addendum exists. Thus, both the <originalreporttext> and <reporttext> tags may be used in the same template to customize the output for the original report when addendums exist, such as to add a different banner.*
- *If an addendum exists, but the report template does not include an <addendumtext> tag, the template is considered invalid since the addendum(s) cannot be included in the printout. Since this represents a potential patient safety issue, the custom tags will be ignored and <maintext> will be implied.*

Two example templates (**Simple Reverse Template** and the **Complex Reverse Template**) and their example results are shown on the next two pages, using the new merge fields to position the addendum text at the top of a printed report.

Simple Reverse Template Example and Result



Complex Reverse Template Example



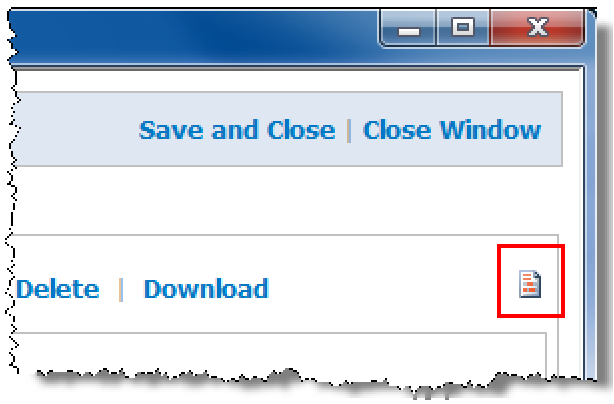
Creating a Fax Template

To create a fax template:

1. Create the fax template file in Microsoft Word or WordPad.
   - Be sure to include at least the <*maintext*> merge field. To see a list of all available merge fields:

   a. On the **System** or **Sites** tab in the **Setup** group, click **Templates**.

   b. Click the icon at the upper right portion of the **Fax Template** dialog box.



   A window showing the list of merge fields opens.

   c. To insert a merge field in the Word document, copy the field from the list. Be sure to copy the field exactly as it appears, including the brackets.

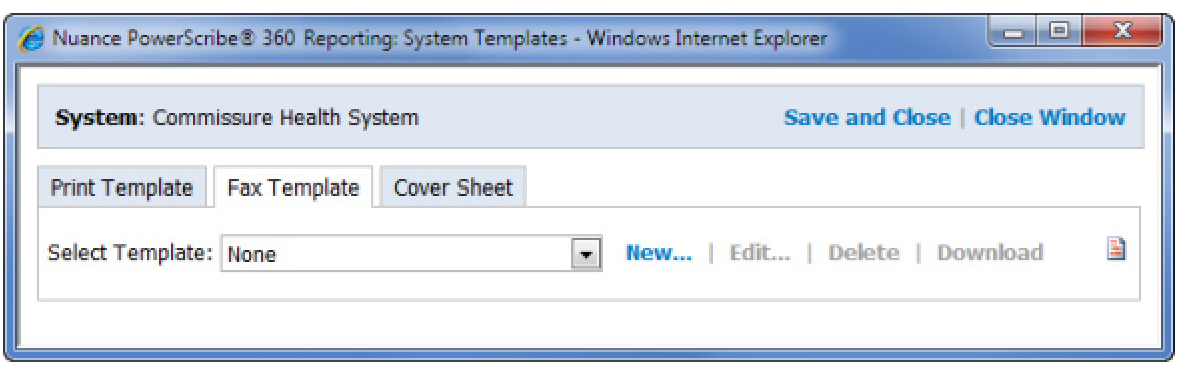
2. Save the template as an *.rtf* file.

To add the fax template at the system, site, or site location level:

1. To add the fax template at the system level:

   a. On the **System** tab in the **Setup** group, click **Templates**.

   b. Select the **Fax Template** tab.



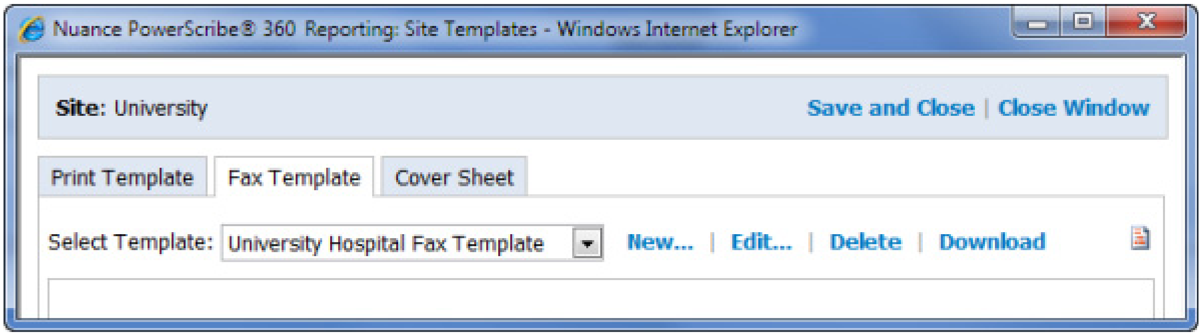
OR

To add the fax template at the site level:

a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

b. Click **Templates…**.

c. Select the **Fax Template** tab.

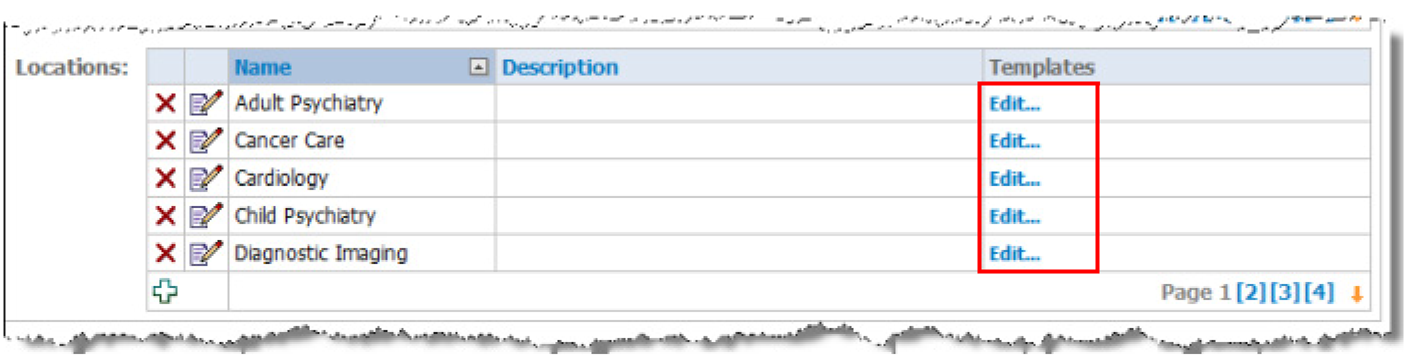


OR

To add the fax template at the site location level:

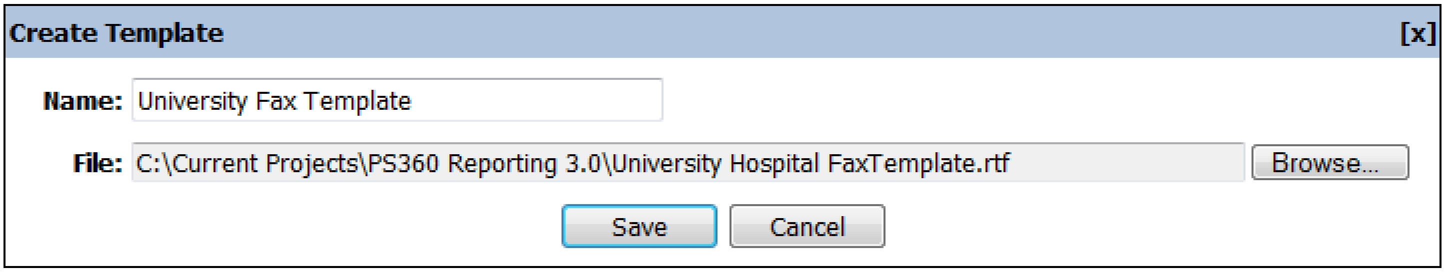
a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

b. Next to the location to which you want to add a fax template, click **Edit…** in the **Templates** column.

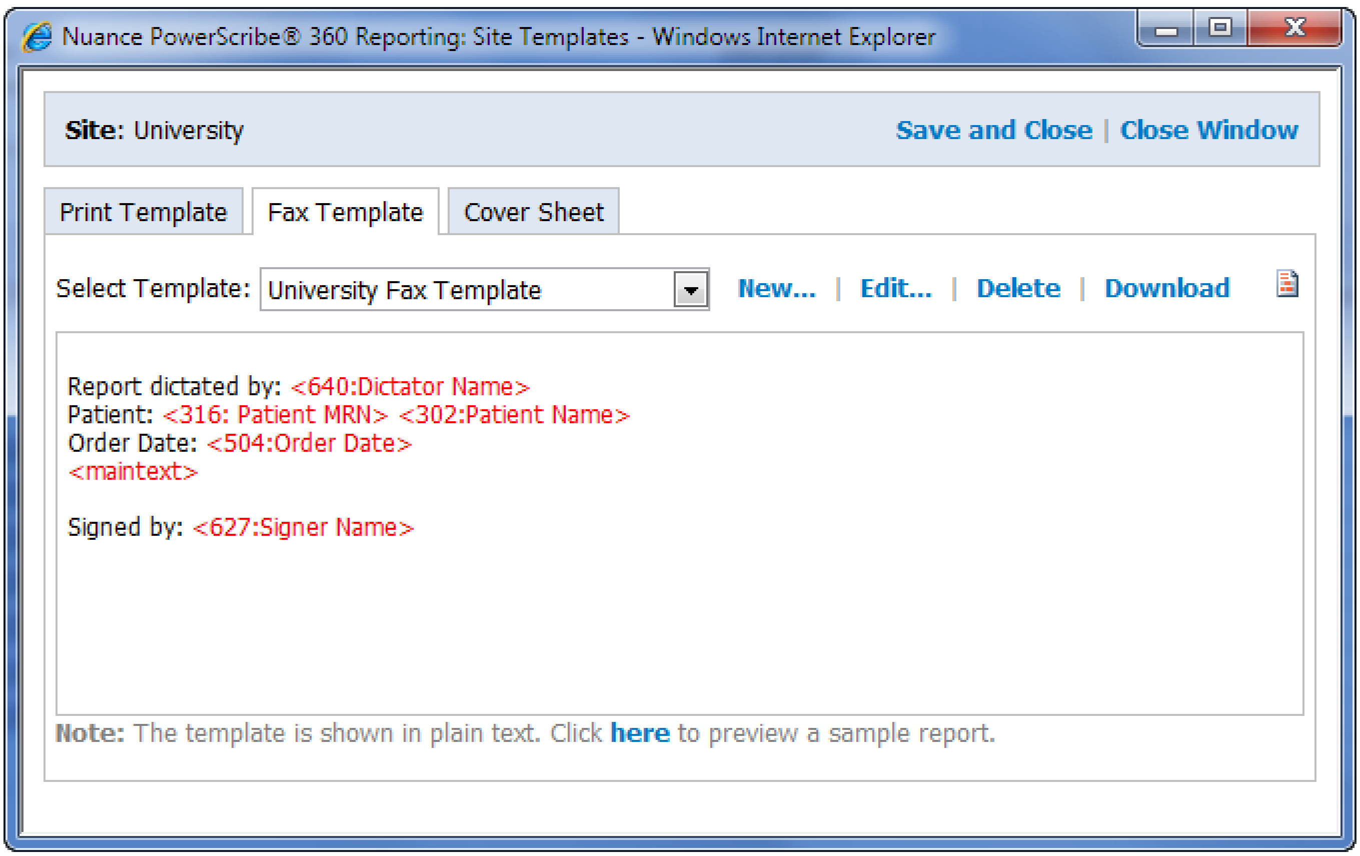


c. Select the **Fax Template** tab.

2. Click **New**.



3. Type a **Name** for the new fax template.
4. Click **Browse**.
5. Navigate to and select the file you created in Word or Wordpad. Click **Open**.
6. Click **Save**. The template appears in the plain-text preview window.



To preview the template as it will appear with a report, click the link below the editing window. At the prompt, click **Open**. A sample report appears in a Word window. Close the window when you have finished.

7. Click **Save and Close** to save the fax template.

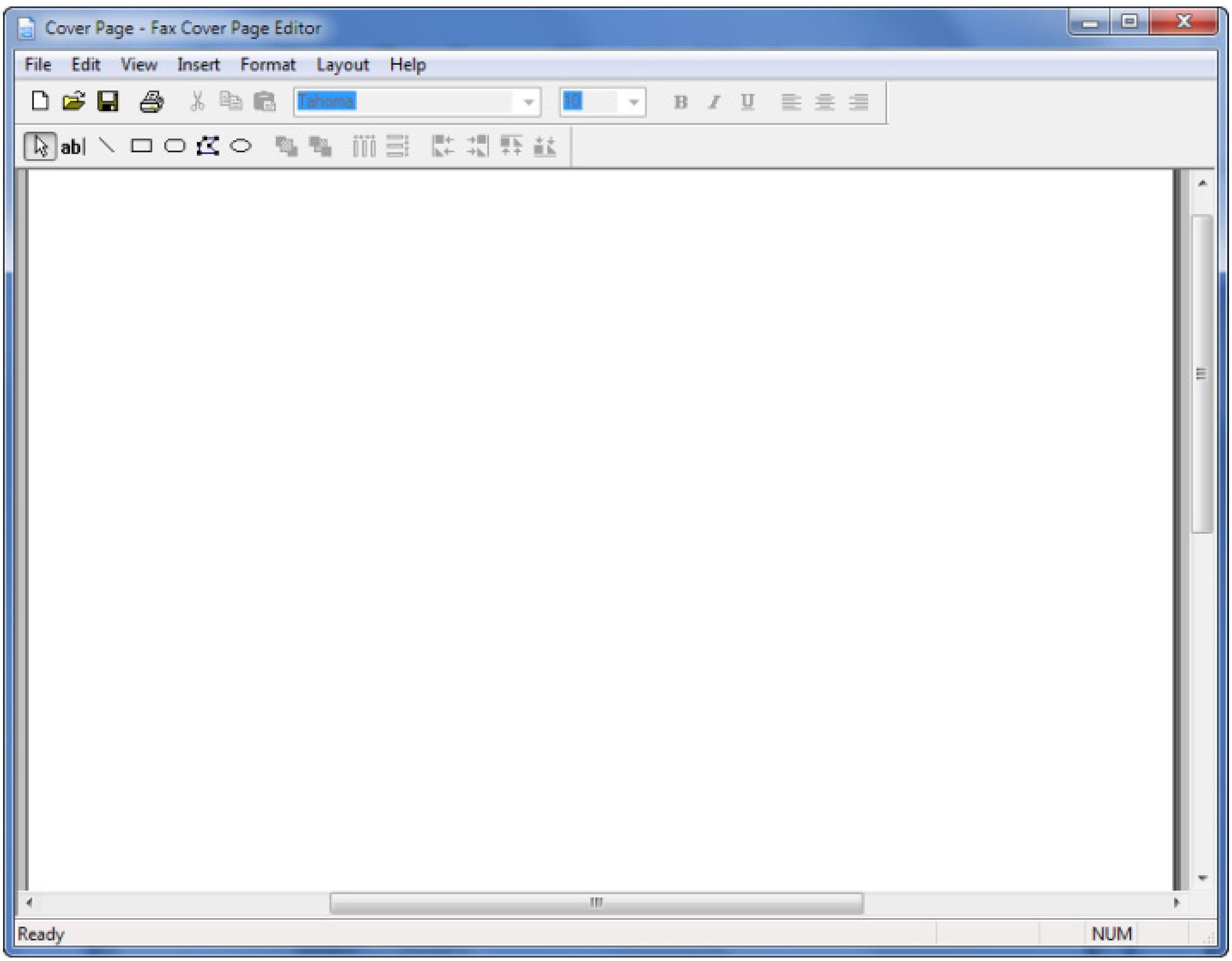
Creating a Fax Cover Sheet

Creating a Fax Cover Sheet in Windows 7

In Windows 7 you can create a fax cover sheet using the *Windows Fax and Scan* program.

To create the fax cover sheet in Windows XP:

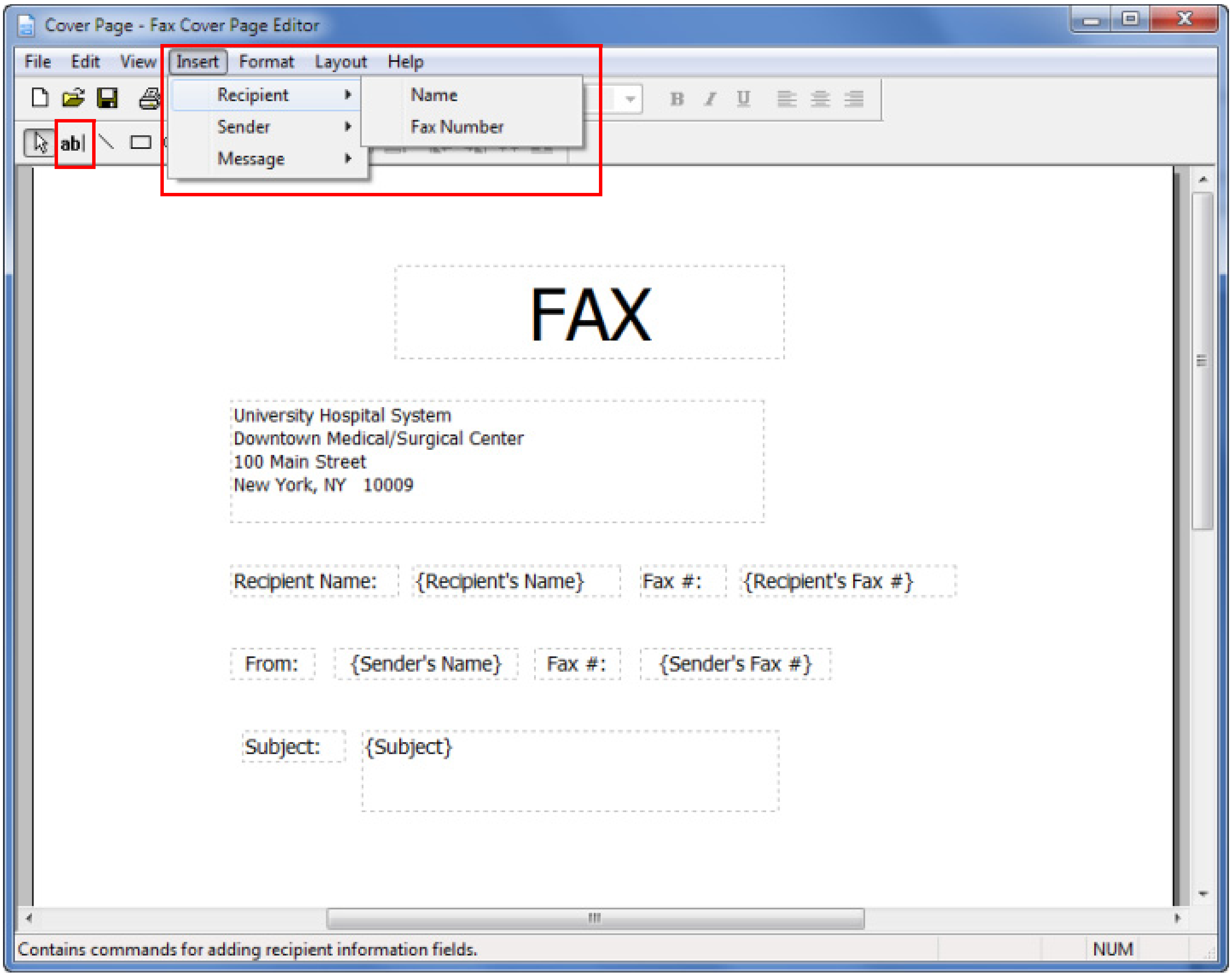
1. Click the **Start** button , click **All Programs**, then click **Windows Fax and Scan**.
2. Make sure you're in the Fax view by clicking **Fax** at the bottom of the left pane.
3. Click the **Tools** menu, click **Cover Pages**, and then click **New**. A blank window containing the available cover page tool opens.



4. To add commonly used label and text boxes to the cover page, click the **Insert** menu, and then do one or more of the following:

- Click **Recipient**, and then click the type of recipient information that you want the cover page to display.
- Click **Sender**, and then click the type of sender information that you want the cover page to display.
- Click **Message**, and then click the type of message information that you want the cover page to display.

5. To add text, click the Text button ab| on the toolbar, and then drag your pointer to draw a text box. Type the text that you want the cover page to display.
6. The following illustration shows an example fax cover sheet.



7. When finished, click **File > Save** and save the file to your preferred location. The cover sheet file is saved with a *.cov* file extension.

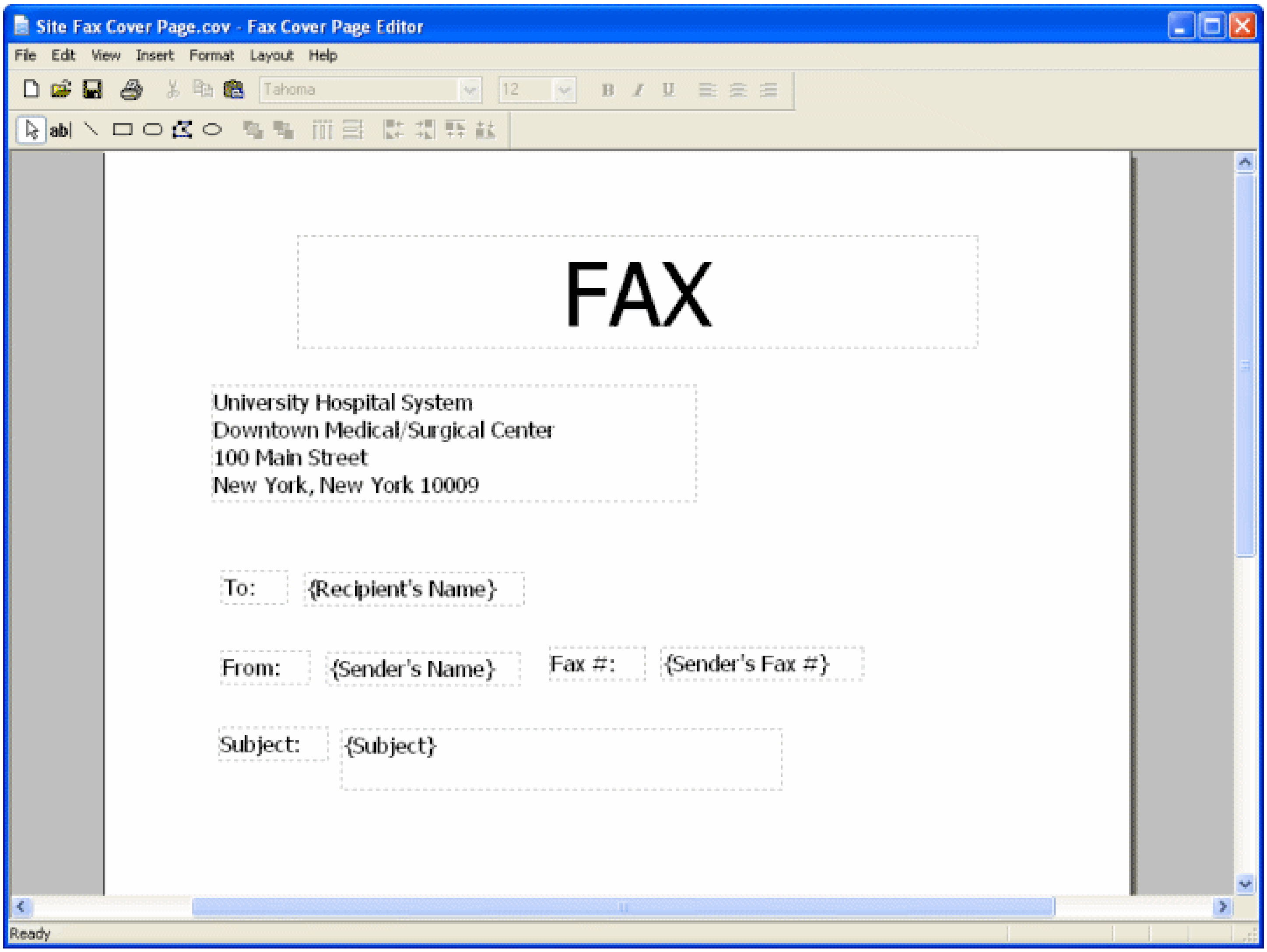
Creating a Fax Cover Sheet in Windows XP

Begin by creating a fax cover page in the *Microsoft Fax Cover Page Editor* utility.

***Note:** To use this utility in Windows XP, you must first install the Fax service. Refer to your Windows documentation for information on installing this or other Windows components.*

To create the fax cover sheet in Windows XP:

1. Select **Start** > **All Programs** > **Accessories** > **Communications** > **Fax** > **Fax Cover Page Editor**. The editing window opens.



2. Use the utility's editing features to create the cover sheet. For more information, refer to the *Fax Cover Page Editor*'s online help.

> ***Note:*** *The utility allows you to insert merge fields by selecting Insert from the menu bar and then selecting fields from the Recipient, Sender, and Message submenus. The PowerScribe 360 Reporting application supports only the following fields:*
>
> *Recipient: Name, Fax Number*
>
> *Sender: Name, Fax Number*
>
> *Message: Note, Subject, Date Sent, Number of Pages*

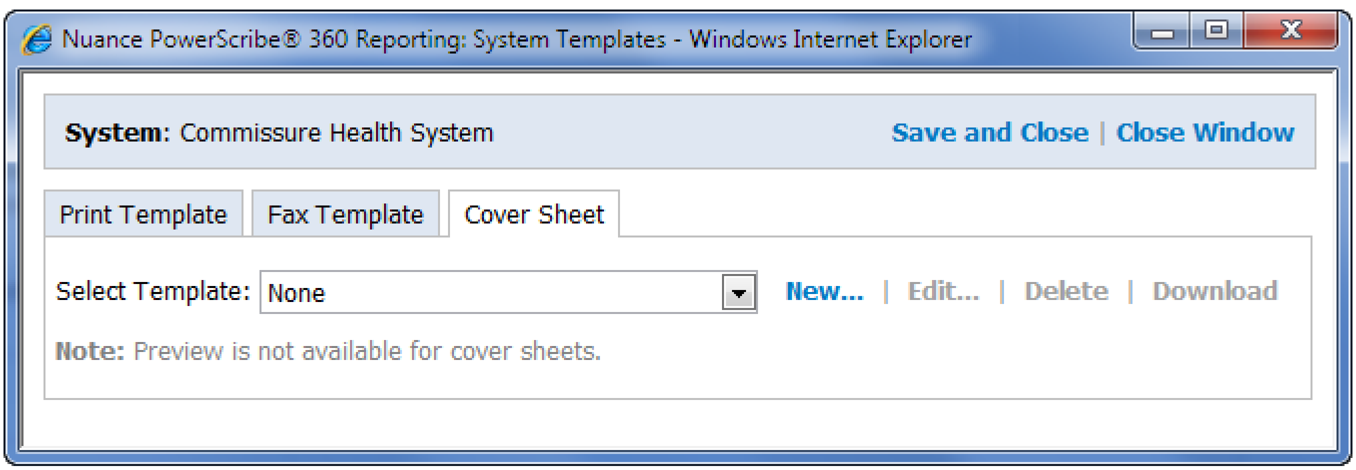
3. Click **File > Save As…**.
4. Save the cover sheet to a folder on your computer. The cover sheet file has a *.cov* file extension.

Adding a Fax Cover Sheet

Use the following steps to add the fax cover sheet you created (regardless of which version of Windows you used to create it).

To add the fax cover sheet:

1. To add the fax cover sheet at the system level:
   a. On the **System** tab in the **Setup** group, click **Templates**.
   b. Select the **Cover Sheet** tab.

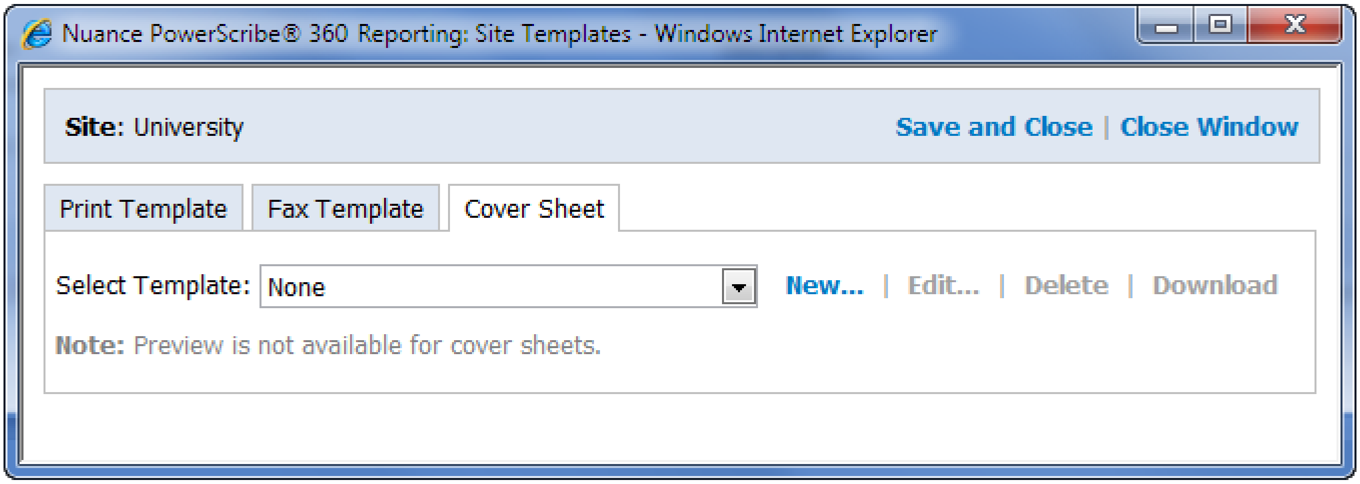


OR

To add the fax cover sheet at the site level:

a. On the **Sites** tab in the **Setup** group, click **Templates…**.

b. Select the **Cover Sheet** tab.

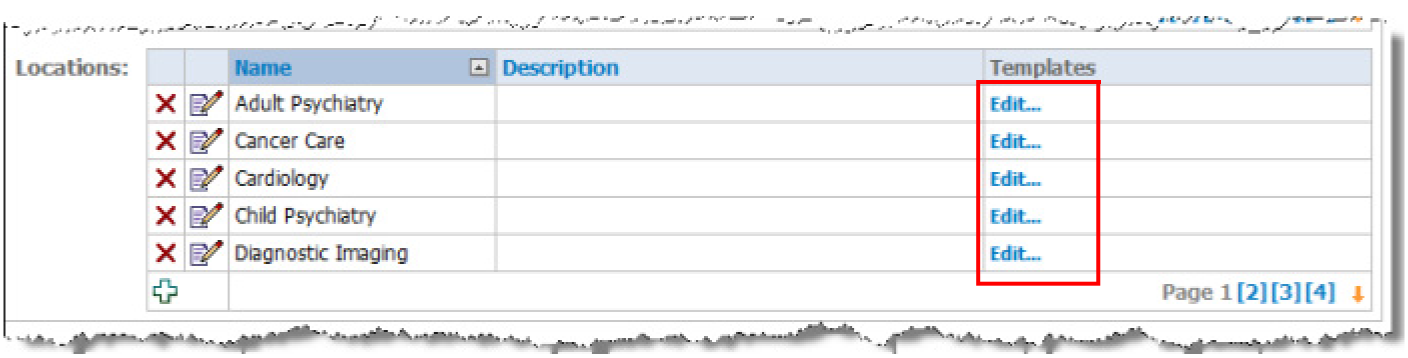


OR

To add the fax cover sheet at the site location level:

a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

b. Next to the location to which you want to add a fax template, click **Edit…** in the **Templates** column.

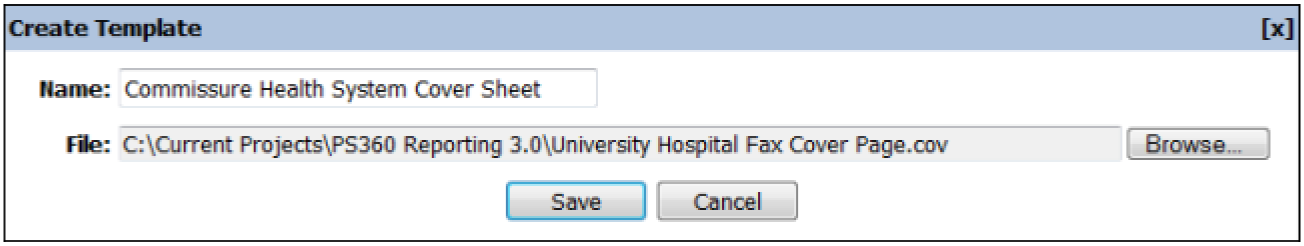


c. Select the **Cover Sheet** tab.

2. Click **New…**.

3. Enter a name for the cover sheet.

4. Navigate to and select the cover sheet file and click **Open**. Cover sheet files have a *.cov* extension.



5. Click **Save**. The template appears in the **Select Template** list.
6. Click **Save and Close** to save the template.

Modifying a Template

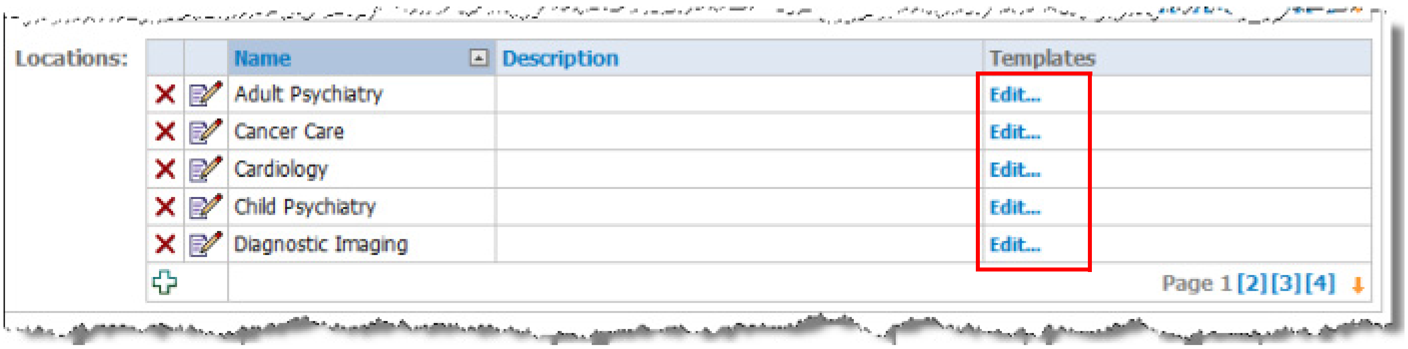
You can modify a print, fax, or cover sheet template for your system or site, and you can modify a template for a location within a site.

Modifying Print and Fax Templates

To modify a print template:

1. To modify a print template at the system level:
   a. In the **Setup** group, select the **System** tab.
   b. Click **Templates…**.
   c. Select the **Print Template** tab.
   OR
   To modify a print template at the site level:
   a. In the **Setup** group, select the **Sites** tab.
   b. Click **Templates…**.
   c. Select the **Print Template** tab.
   OR
   To modify a print template at the site location level:
   a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

b. Next to the location to which you want to modify a print template, click **Edit…** in the **Templates** column.



c. Select the **Print Template** tab.

2. Download the template file from the server, if the current version is not on your computer. Otherwise you can skip this step. To download the file:
   a. Select the template you want to modify from the list. The template appears in the plain-text preview window.
   b. Click **Download**.
   c. At the prompt, click **Save**.
   d. Navigate to and select the folder in on your computer in which you want to store the template file.
3. In Word, open and edit the template file as desired. Save and close the file.
4. Click **Edit…**. Navigate to and select the file you edited. The edited file appears in the plain-text preview window. To preview the template in Word, click the link at the bottom of the window; click **Open** to view a sample report. Then close the preview window.
5. Click **Save and Close** to save your changes.

To modify a fax template:

1. To modify a fax template at the system level:
   a. In the **Setup** group, select the **System** tab.
   b. Click **Templates….**
   c. Select the **Fax Template** tab.

   OR

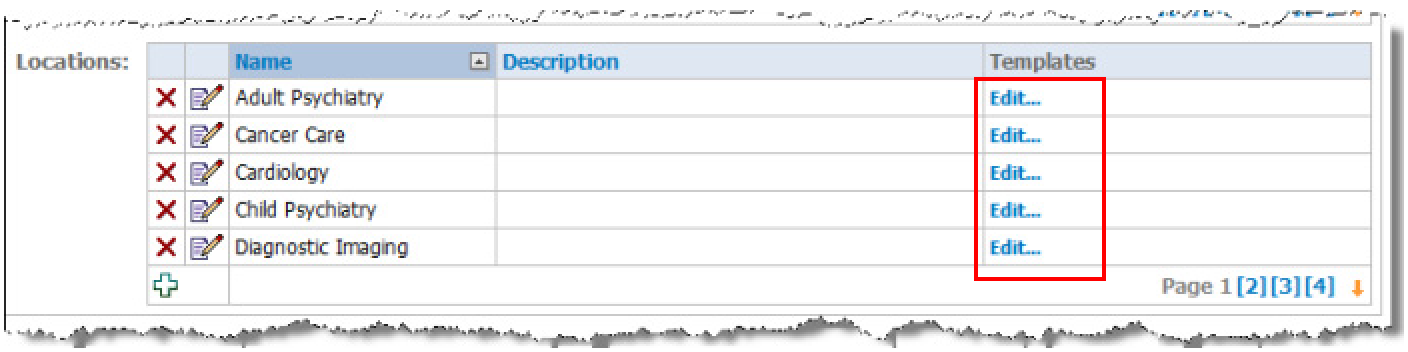
   To modify a fax template at the site level:
   a. In the **Setup** group, select the **Sites** tab.
   b. Click **Templates….**
   c. Select the **Fax Template** tab.

   OR

   To modify a fax template at the site location level:

a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

b. Next to the location to which you want to modify a fax template, click **Edit…** in the **Templates** column.



c. Select the **Fax Template** tab.

2. Download the template file from the server, if the current version is not on your computer. Otherwise you can skip this step. To download the file:

   a. Select the template you want to modify from the list. The template appears in the plain-text preview window.

   b. Click **Download**.

   c. At the prompt, click **Save**.

   d. Navigate to and select the folder in on your computer in which you want to store the template file.

3. Open and edit the template file as desired. Save and close the file.

4. Click **Edit…**. Navigate to and select the file you edited. The edited file appears in the plain-text preview window. To preview the template, click the link at the bottom of the window; click **Open** to view a sample report in an editing window. Then close the preview window.

5. Click **Save and Close** to save your changes.

Modifying Fax Cover Sheet Templates

To modify a fax cover sheet template:

1. To modify a fax cover sheet template at the system level:

   a. In the **Setup** group, select the **System** tab.

   b. Click **Templates…**.

   c. Select the **Cover Sheet** tab.

   OR

   To modify a fax cover sheet template at the site level:

a. In the **Setup** group, select the **Sites** tab.

b. Click **Templates…**.

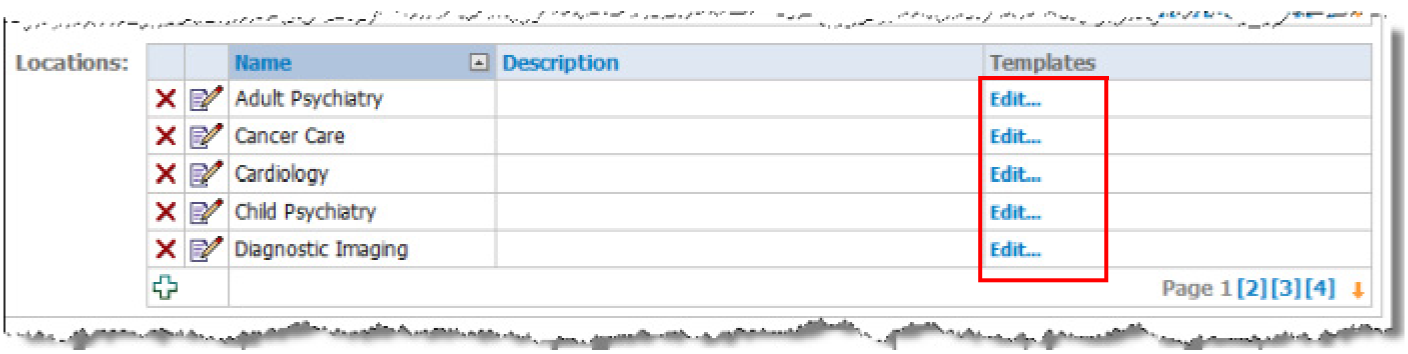
c. Select the **Cover Sheet** tab.

OR

To modify a fax cover sheet template at the site location level:

a. On the **Sites** tab in the **Setup** group, select the site from the drop-down list at the upper right.

b. Next to the location for which you want to modify a fax cover sheet, click **Edit…** in the **Templates** column.



c. Select the **Cover Sheet** tab.

2. Download the template file from the server, if the current version is not on your computer. Otherwise you can skip this step. To download the file:

   a. Select the template you want to modify from the list.

   b. Click **Download**.

   c. At the prompt, click **Save**.

   d. Navigate to and select the folder in on your computer in which you want to store the template file.

3. In the *Windows Fax Cover Page Editor* utility, open and edit the template file as desired. Save and close the file.

4. On the **Cover Sheet** tab in *PowerScribe 360 Reporting*, click **Edit…**. Navigate to and select the cover sheet you edited.

   Note: *The preview feature is not available for fax cover sheets.*

5. Click **Save and Close** to save your changes.