eSOne Mobile for iOS

Introduction to eSOne Mobile for iOS

eSOne Mobile for iOS offers a convenient, portable, end-to-end documentation process. Clinicians can easily review, edit and complete documentation on their mobile device, as well as submit dictations for transcription.

eSOne Mobile is a safe, secure application that supports HIPAA compliance.

Dictations are retained for 14 days after the appointment date. All data that is stored on the mobile device is protected by Apple's AES 256-bit crypto engine. Additionally, all the data that is transferred over the Internet is encrypted by a TLS connection. Both mechanisms ensure that data-at-rest and data-in-motion are always secure when you use eSOne Mobile.

System Requirements

- Any iOS device with iOS 18 or greater (the latest iOS version is recommended).
- Internet Access through a wireless Local Area Network (LAN) connection or through a phone service provider. It is strongly recommended to use a Wi-Fi LAN connection when uploading dictations. Minimum bandwidth: LTE/4G data connection; recommended is stable Wi-Fi.
- Communicates over port 443 to https://mobile.escription-one.com using TLS 1.2.

Important: Receiving Calls While Dictating

The eSOne mobile application cannot block incoming phone calls. Apple Inc. makes it impossible for eSOne Mobile, or any application, to block phone calls. If you have concerns about receiving calls while making a dictation, switch your phone to 'Do Not Disturb' or 'Airplane Mode' while dictating. To continue using the application while in Airplane Mode, please enable Wi-Fi.

If a phone call is received while dictating, eSOne Mobile will pause the recording. Dictation that was made prior to the incoming call will not be lost; to resume dictating after finishing the call, tap the record button again and continue to dictate.

Installing eSOne Mobile for iOS

To install the eSOne Mobile app, first go to the Apple App Store and search 'eSOne Mobile'. Choose the eSOne Mobile application, then tap the **Get** button to download.

Starting eSOne Mobile

To start eSOne Mobile, tap the application icon on the home screen. Use your InQuiry login credentials to log in. Both dictating users and non-dictating staff can log into eSOne Mobile.

Select a Region

The first time you open the application, you will be prompted to select a region. This allows the app to connect to the proper servers for your client. Choose the region that applies to your location or client.

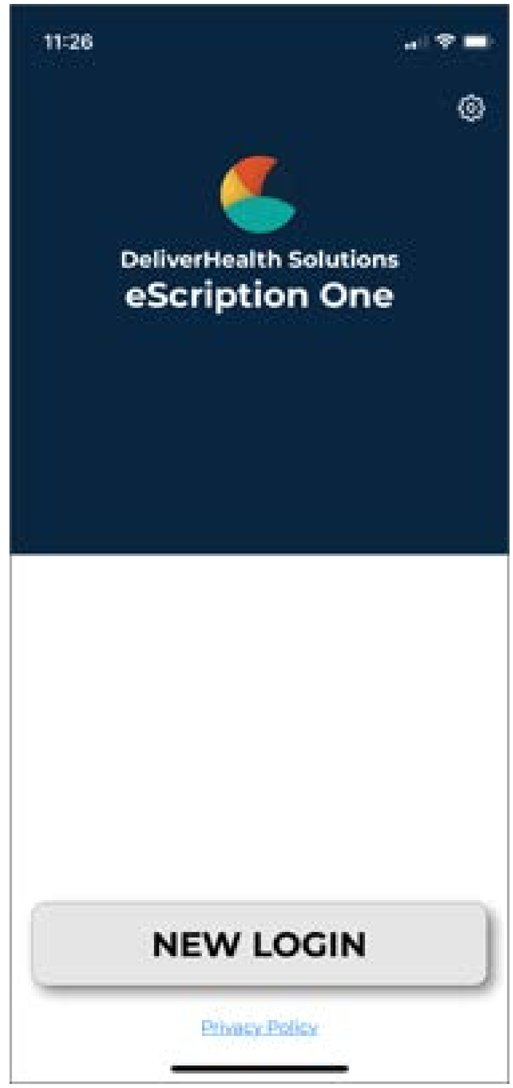
In the unlikely event that you need to change your region, you will need to uninstall and reinstall the application.

Note

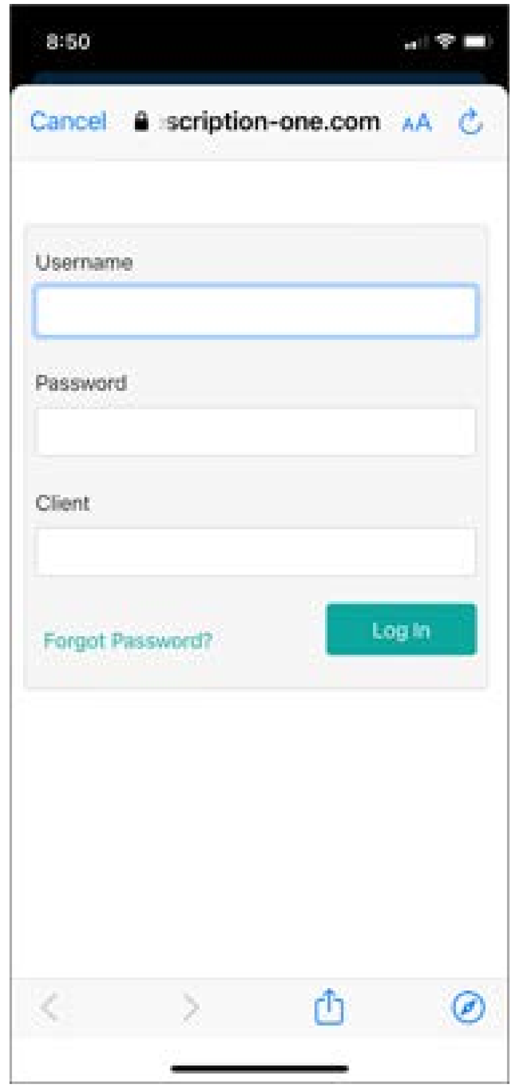
Uninstalling the app will permanently delete any incomplete (on-hold) dictations; please verify all started dictations have been uploaded prior to uninstalling the app. You will be prompted to choose your region upon the first login after reinstalling the app.

Logging in

To log in, press the **NEW LOGIN** button at the bottom of the screen.



The credentials screen opens.



Enter your login credentials: username, password, and client information, then press **Log In**.

The "Forgot Password?" link next to the Login button allows users who have saved a valid email address to receive password reset instructions by email if it is lost or forgotten. For more information, go to Email Verification and Resetting your Password.

Note

If multi-factor authentication (MFA) has been enabled for your company, please see Setting up Multi-Factor Authentication.

If your password is expired, you are prompted to change it. Enter your username, client code, current password, and new password. After verifying it, click **Change Password**.

The first time you log in, the **Remember Login** screen will appear next, asking if you want the app to remember the login name or login name and password on the device you are logging into.

(The 'Remember my login with password' option will not appear if the admin has disabled this feature for clients/users.)

You can also choose **Do not remember**.

After you make your selection(s), a confirmation box appears. Select **OK**.

Note

This screen will initially appear for each profile you log into if you have multiple profiles.

If you later want to change your login options, go to the app's Settings screen.

If saving passwords is not allowed for users, the 'Save Password' option will be disabled on the Settings screen.

Note

Please note that with 'Save Password' enabled, anyone with access to your device can access your eSOne account and the confidential medical records in it.

When the login name is saved, the profile appears on the login screen (with a combination of First name Last name). Tap the profile to log in as that user. You will be prompted for the password if it has not been (or cannot be) saved.

Only the last saved profile to log in will appear on the login screen. You can still link multiple profiles in the Settings tab to switch between profiles quickly.

Setting up Multi-Factor Authentication

Multi-factor authentication is another way to verify a user's identity, adding an extra level of security to the login process. For eSOne applications, it is recommended that users set up MFA using the Auth0 Guardian authentication application. However, due to a limitation with the Auth0 Guardian app, users cannot set up MFA for the mobile apps on a mobile device. To do so, you must perform the initial setup on InQuiry or InSync. Once this initial setup is complete, MFA will work for the mobile app as well. Logging in will require you to accept a notification sent to your phone.

> **Note**
>
> Other authentication apps may work as well but are not officially supported.

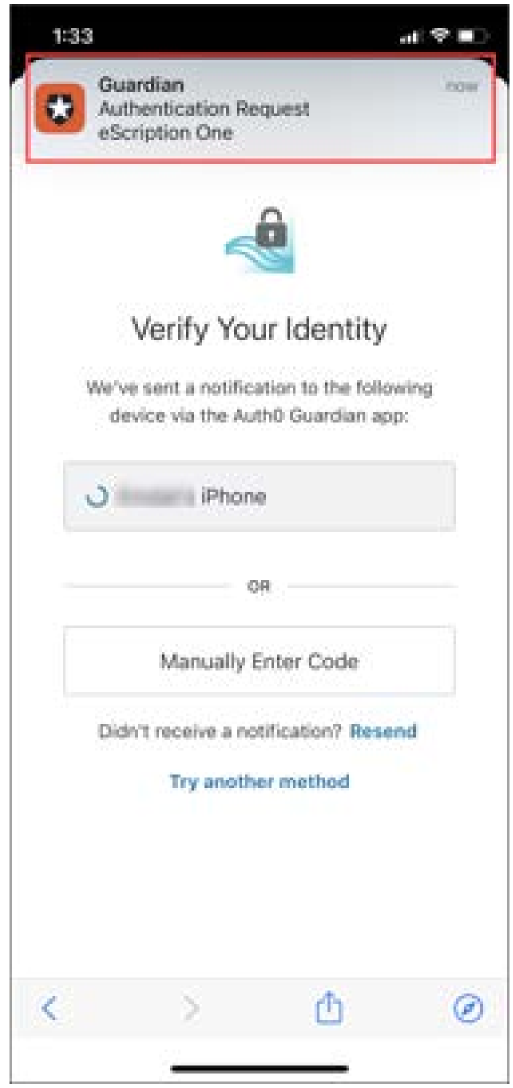
Logging in with Multi-Factor Authentication

Once the initial MFA setup has been completed, you will subsequently log in to your mobile app as shown in the steps below.

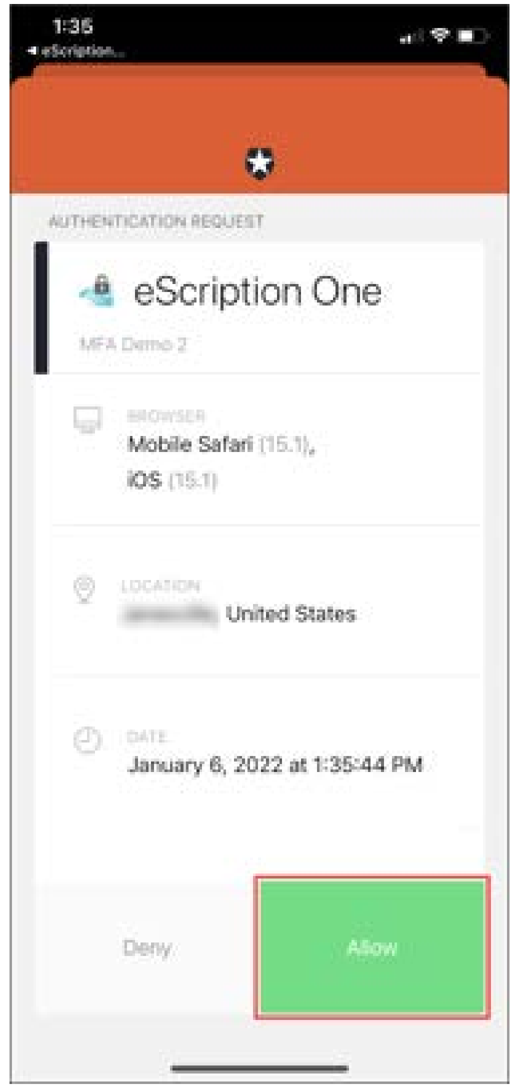
> **Note**
>
> If you log in with saved credentials for both username and password, you will not need to authenticate with MFA. No notification will be sent to your phone.

1. Launch the eSOne mobile app.
2. Enter your login credentials.
   The 'Verify Your Identity' screen opens, indicating that a notification has been sent to your phone and is awaiting confirmation.
3. Verify Authentication.

Depending on your device and Guardian app settings, you may receive a push notification for the authentication request. If so, tap on the push notification to easily open the authentication request.

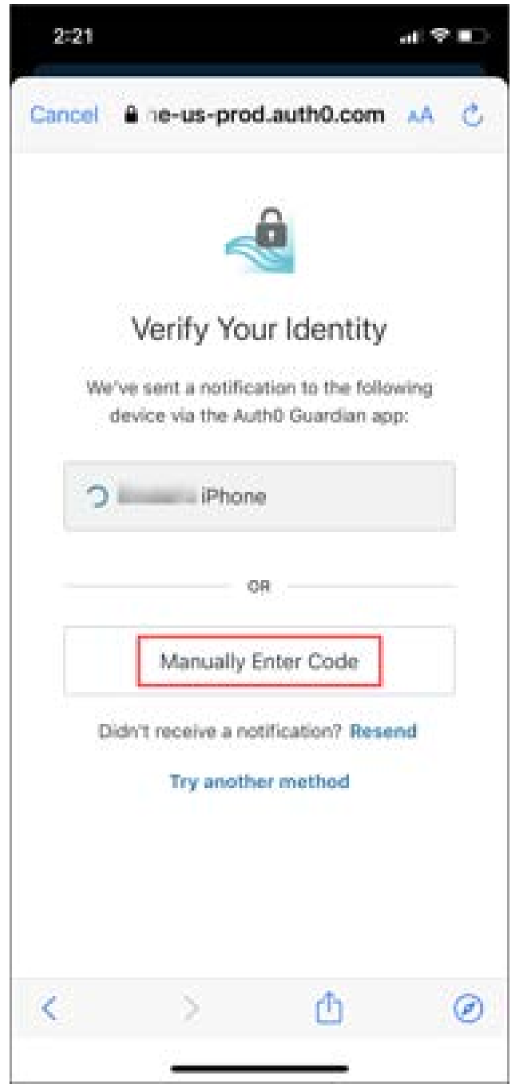


If a push notification was not received, open the Guardian app and tap **Allow** on the appropriate request.

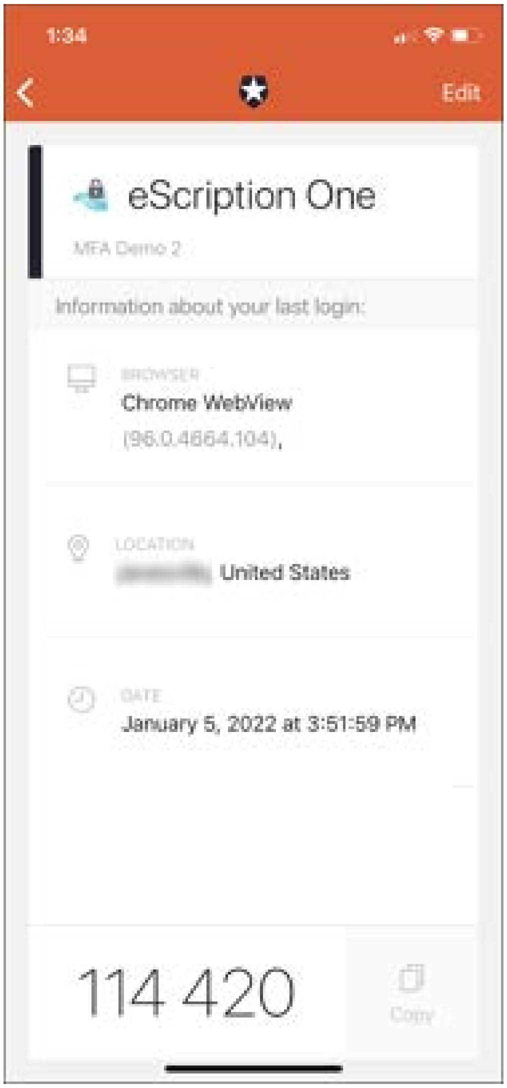


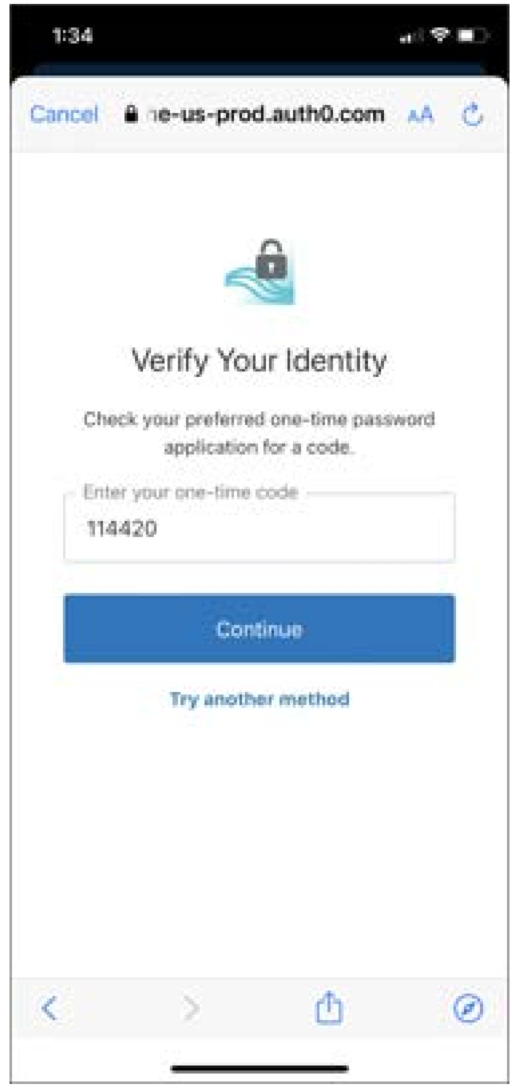
If you do not receive the notification, you can choose to have the notification resent, or you can manually enter the code at the bottom of the Guardian app (see below).

To manually enter the code, choose Manually Enter Code on the 'Verify Your Identity' screen.



Open the Guardian app and choose the token for your user. A one-time code will appear at the bottom of the Guardian app. Enter this code on the 'Verify Your Identity' screen.





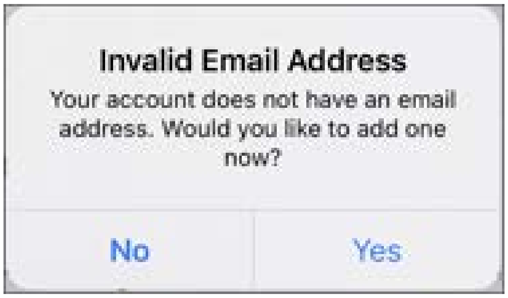
Click **Continue**. After successful authentication, you will automatically be logged into your eSOne app.

> **Note**
>
> If you cannot log in with MFA after having done so previously, please contact your admin to have it reset.

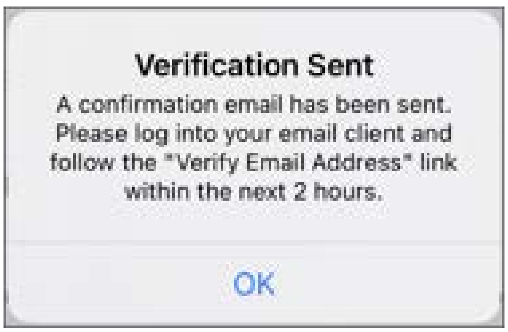
Email Verification

After logging in, the eSOne Mobile application checks for a valid and verified email address (if your client requires this).

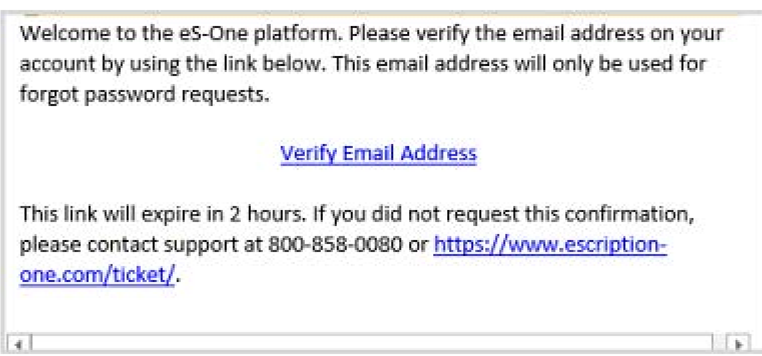
Valid Email Check: If you have not entered an email address, you will be prompted to add one. You can skip this step, but you will be prompted again on your next login.



Email verification: Once an email address is added, an email is sent to your address to verify it.



Click the link in the email, and your address will be verified.



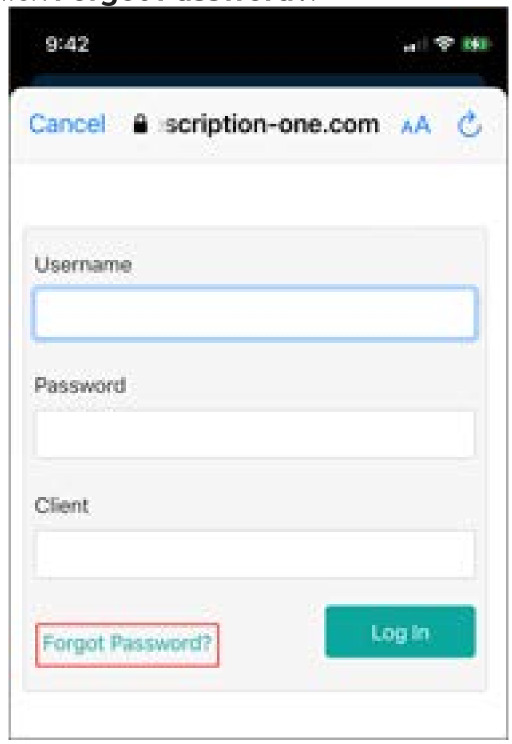
When accessing the eSOne Mobile application without a verified email address, you will receive a notice, but will still be able to use the application.

Editing email address: To edit the user email address, go to Contact Information in the Settings tab. If the email address has previously been verified and is then edited, you will be prompted to verify the updated email address.

Resetting your Password

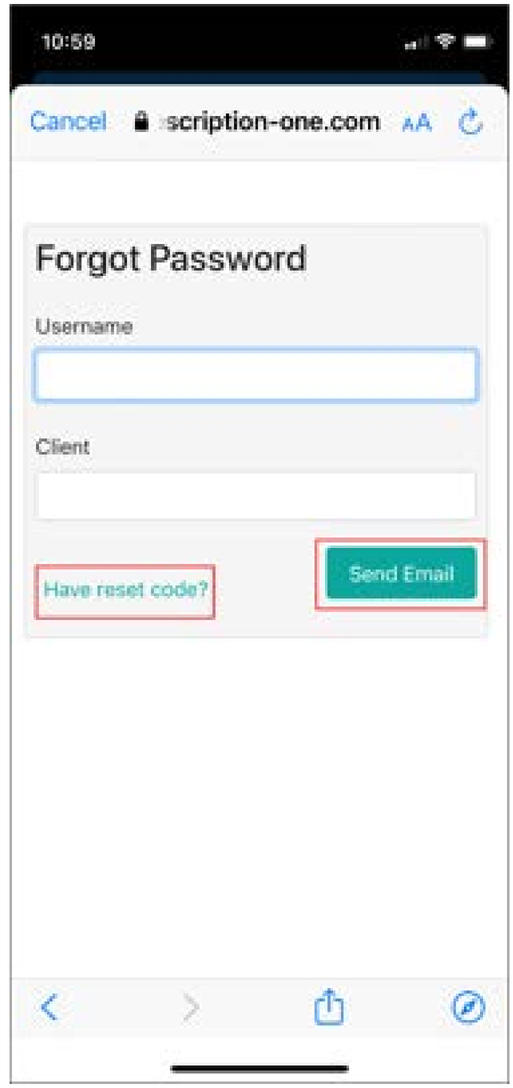
If you have forgotten your password, you can reset it using the steps below.

1. On the login screen, enter your Username and Client code, then click **Forgot Password?**.



2. On the 'Forgot Password' screen, click either the **Send Email** button or **Have reset code?** link (if you already have a reset code).

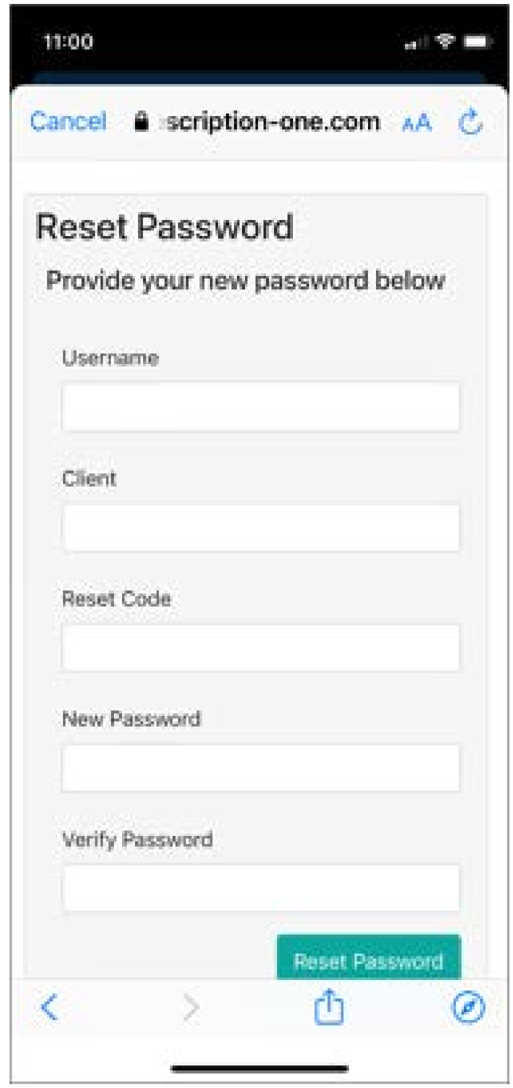
If you did not enter your Username and Client Code on the login screen, you will need to enter them here.



3. If you choose **Send Email**, you must have a verified email address (see Email Verification). If so, an email will be sent to you with instructions and a link for resetting your password. Once you click the link, the 'Reset Password' screen appears with the reset code filled in. Enter the remaining information, then click the **Reset Password** button.

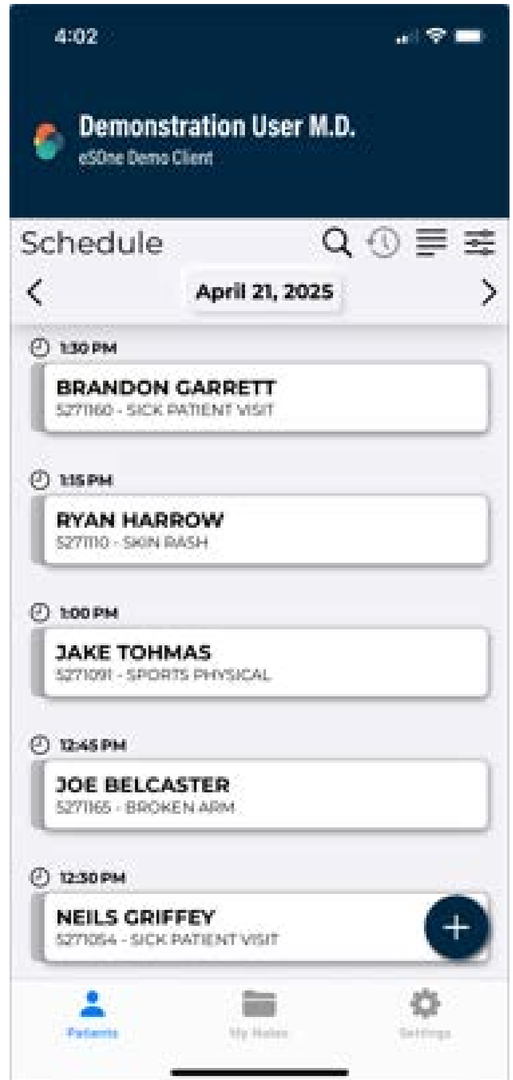
If you choose **Have reset code?**, the 'Reset Password' screen appears without the reset code filled in. Enter the code and remaining information, then click the **Reset Password** button.

If you selected **Send Email**, you can also copy the code from the email and paste it on this screen.



Using eSOne Mobile

The Mobile iOS application screens have three tabs at the bottom: Patients, My Notes, and Settings. Use these to navigate between the main screens of the app. The active tab is indicated with blue coloring. The eSOne Mobile application displays the Patients tab after your initial login, or the last screen you visited in your previous session.



Patients

The **Patients** tab is where users can record new dictations and view patient appointments and/or inpatient encounters.

My Notes

The **My Notes** tab is where users can view, approve/sign, and edit notes.

Settings

The **Settings** tab is where users can configure default settings for appointments, document types, locations, and other application features. Users can also add or switch to linked accounts from this tab, as well as log out of the mobile app.

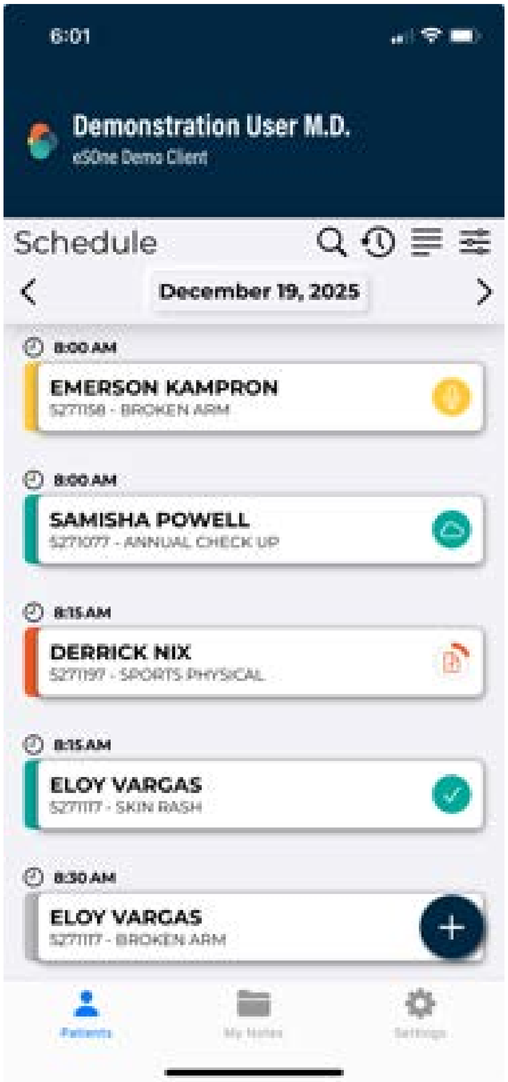
Logging Out

For security reasons, we recommend logging out of the mobile app when it is not in use. To do so, navigate to the Settings tab then tap the Logout icon in the upper right corner.

Patient Confidentiality

To ensure patient confidentiality, app content will be hidden when switching between apps.

Patients Tab



Use the Patients tab to view the daily appointment schedule, open appointment details, and record dictations.

By default, this tab is named **Patients**. The account administrator can change this label to something more appropriate to the client.

The eSOne mobile app supports outpatient and inpatient schedules. By default, the app opens to schedule (outpatient) mode. The mode can be changed in Filters settings. This section of the user guide will focus on the outpatient schedule mode. See Inpatient Workflow for more information about inpatient mode.

Filter and Sort the Schedule

Filters

To change the schedule mode and filter the schedule, tap  to open the Filters page. Tap the desired mode and/or filter and tap **Done** at the top of the Filters page to save changes.

Mode

If the client supports both inpatient and outpatient workflows, users can switch between them by tapping the desired mode. For more information regarding the inpatient workflow within the mobile app, please see Inpatient Workflow. The following information in this section assumes an outpatient workflow is being used.

Resources

Schedule resources are used to assign patient appointments or encounters to specific clinicians or groups of clinicians. If a clinician belongs to multiple resource groups they can filter their appointment list to only display the selected resources.

Dictation Status

Users can minimize the number of appointments displayed on the schedule by filtering the list based on the dictation status. Statuses available for filtering are:

- **Dictation from another source** - appointments with a dictation uploaded from a different mobile device or dictation source (InSync, InTouch, ShadowLink, etc.), or uploaded from this device but no longer stored on this device. Dictations uploaded from other devices or apps cannot be played from this device.
- **Dictation uploading** - appointments with an uploading dictation from this device.
- **Dictation completed** - appointments with a completed dictation from this device.
- **Hidden** - appointments that have been marked as hidden.

On-hold dictations cannot be filtered from the schedule.

Sorting

One sort option can be applied to reorder the schedule based on user preference. The schedule can be sorted **ascending** (oldest to newest dates or A to Z) or **descending** (newest to oldest or Z to A). Tap the desired sort order (ascending or descending), then tap the sort option to sort the schedule based on:

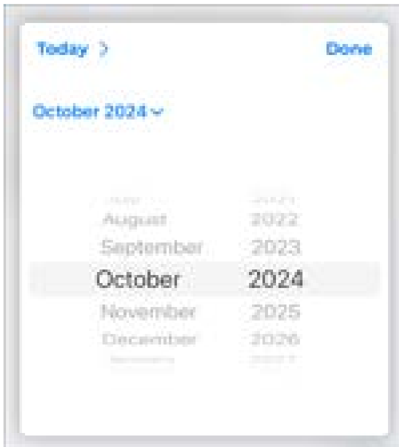
- **Appointment Time** - appointments will be ordered based on the time of the appointment (earliest to latest), then by dictation status in the following order: No Dictation, On-hold, Uploading, Completed, Dictation from another device).
- **Patient Full Name** - appointments will be ordered alphabetically by the patients' full names (if the first names match then the middle initial and/or last names will be used to further order them).
- **Patient Last Name** - appointments will be ordered alphabetically by the patients' last names, but will still appear in "First name Last name" format in the schedule list.
- **Patient First Name** - appointments will be ordered alphabetically by the patients' first names.
- **Dictation Status** - When sorted ascending, patients will be sorted first by dictation status (Dictation on Hold, Upload Complete, Dictation Not on Device) then by patient name.

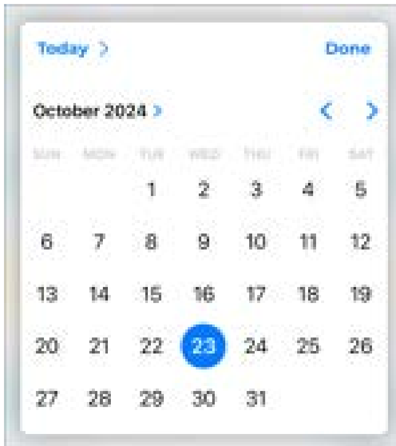
Schedule

Outpatient appointments appear on the schedule based on the schedule resource code assigned to the user and appointment records. Appointments will only appear in the schedule if the client is providing eSOne a data feed. If a data feed is not provided, users can create new dictations and optionally input a patient identifier.

The schedule displays the appointment time above each patient appointment. Each appointment includes the **patient name**, **patient ID**, and a **multi-use text field**, the contents of which are dependent on client setup, but often include the appointment reason or provider name. An additional **custom encounter field** can be added from the Settings tab.

The schedule loads the current date or the last date viewed if the prior session was not on the current date. To view the prior or next day's schedule, press the left or right arrow buttons.





To navigate to a specific date, tap the date in the center of the screen to open the calendar. Choose the desired date in the displayed month, or tap the Month Year text to change the selected month and/or year. Tap the blue Month Year text again to select the date from the calendar and return to the schedule. To jump to today's date, tap the date to open the calendar view, then tap **Today**.

Swipe the schedule down to refresh the list. Note that this only works when the view is already scrolled to the top.

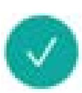
Tap an appointment to open the Record screen and view patient and appointment details as well as recording controls.

Dictation Status

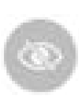
An appointment may have one of several status icons and color coding to indicate the dictation status for that appointment.

 The appointment has a dictation that has been started but not yet uploaded.

 The appointment has a dictation that is currently uploading.

 The appointment has a recorded dictation and has been successfully uploaded.

 The appointment has been recorded and uploaded from another device.

 The appointment has been hidden from the appointment list.

> **Note**
>
> An appointment without a dictation will not have an icon next to it.

Incomplete Dictations

A reminder will be presented when navigating to the Patients tab if there is at least one started dictation 3 or more days old (based on appointment date) that has not yet been uploaded. This reminder will only be presented once per day.

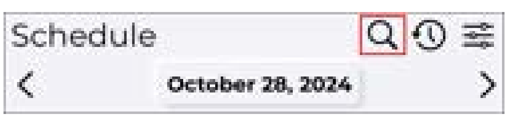
Tap **Ignore** to continue to the schedule as normal, or tap **Show** to open the schedule to the date of the oldest started dictation.

Tap (Earliest Started Dictation) at the top of the schedule list to open the calendar to the earliest date with a started dictation that has not yet been uploaded.

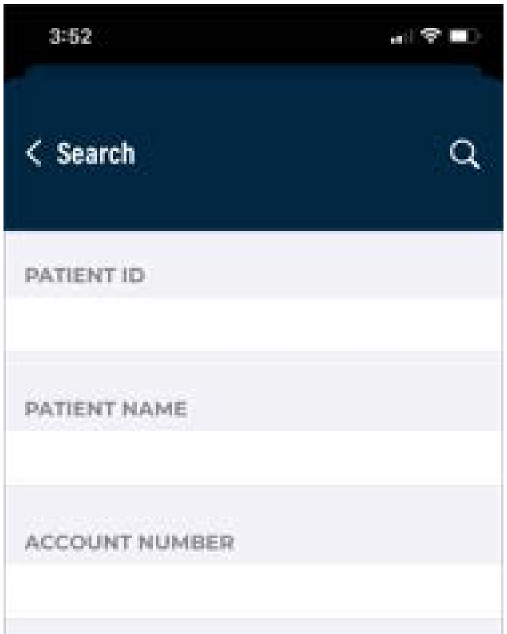
Dictating from the Schedule and Search

Selecting an appointment from the schedule opens the Record screen with all available patient and appointment details and dictations controls. If the desired patient cannot be easily found in the schedule list or does not appear on the schedule, a patient or appointment search can be performed.

Patient and Appointment Search

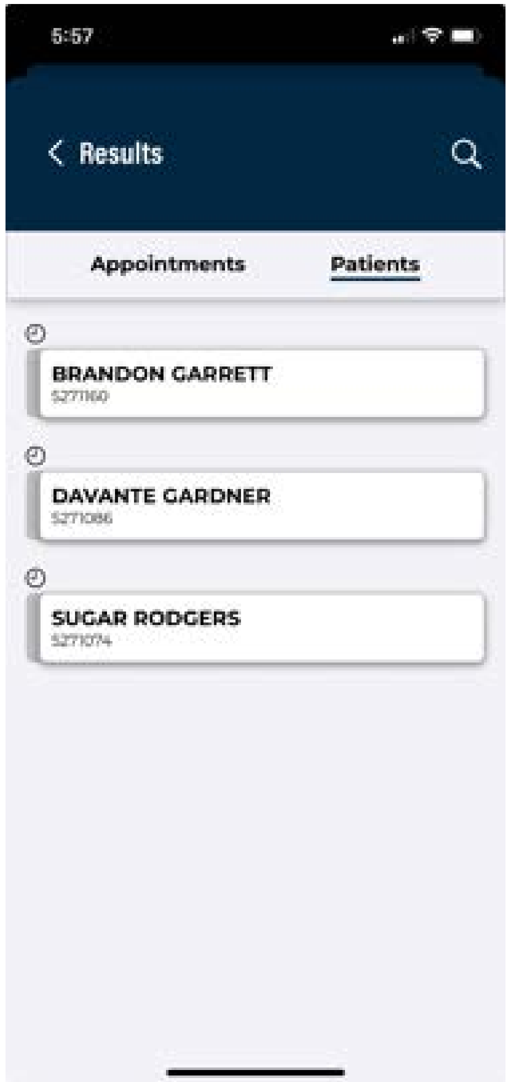


Tap the Search button to search for an appointment already on the schedule list or to add the patient/appointment to the schedule that may not have previously appeared.



The Search dialog will open and prompt for Patient ID, Patient Name, and/or Account Number. The search field labels are customizable per client and may not match what is shown here. Patient and appointment records can only be searched if eSOne receives a data feed from the client.

Enter one or more search criteria. The Patient ID and Account Number must be full matches and the Patient Name can be a partial match of the first or last name. Tap the **search** key in the on-screen keyboard or to submit the search.



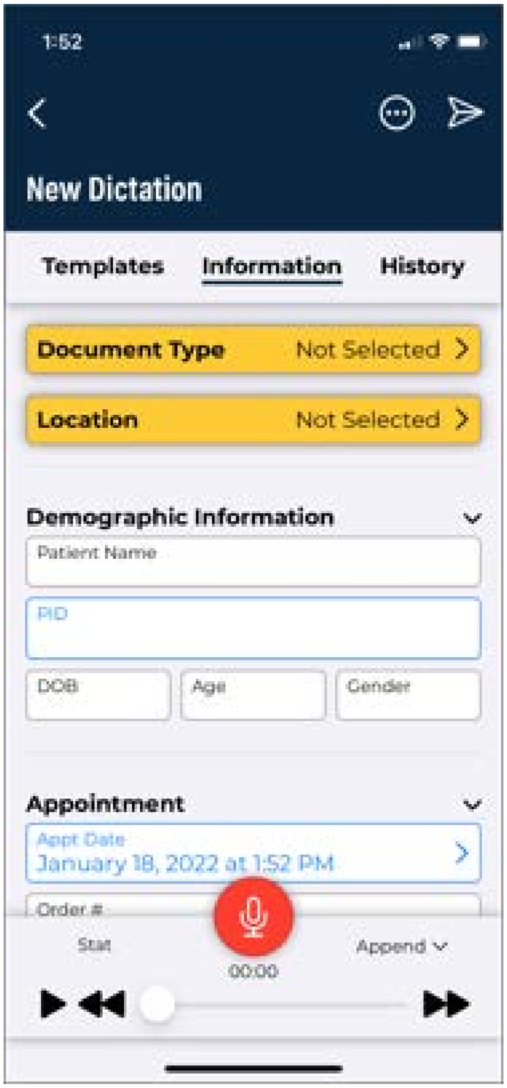
Search results will appear in two tabs: **Appointments** and **Patients**. Tap the desired patient or appointment to add the patient/appointment to the schedule and open the record screen.

Choosing an appointment from the **Appointments** tab will place it on the schedule at the designated date and time, including all associated appointment details.

Choosing a patient from the **Patients** tab will add that patient to the schedule, setting the appointment date to the current date and time. The appointment date and time can be changed if needed.

To return to the schedule without selecting a search result, tap the **<** icon.

Dictating Without an Appointment



To create a new dictation without selecting a scheduled appointment, tap the Patients tab then the Add button +. Depending on the client setup, the document type selected can change the demographic fields presented and also determine which patient identifier field is editable: Patient ID, Account Number, or Order Number. Tap the patient identifier field to enter data. If the patient identifier matches with an existing patient the name, ID, gender, age, and DOB will populate in the dark blue header area.

The appointment date will populate with the date that was loaded in the schedule, along with the current time stamp. Editable fields appear with a blue border and include the patient identifier, Document Type, Location, and Appointment Date and Time fields. Tap the Document Type or Location field to open a selection list. Tap the Appointment Date field to open the date picker. The Templates tab is available for reference. The History tab will populate with any prior transcriptions related to that patient.

> **Note**
>
> The process to create a new dictation for an inpatient encounter is different. Please see Inpatient Workflow for more information.

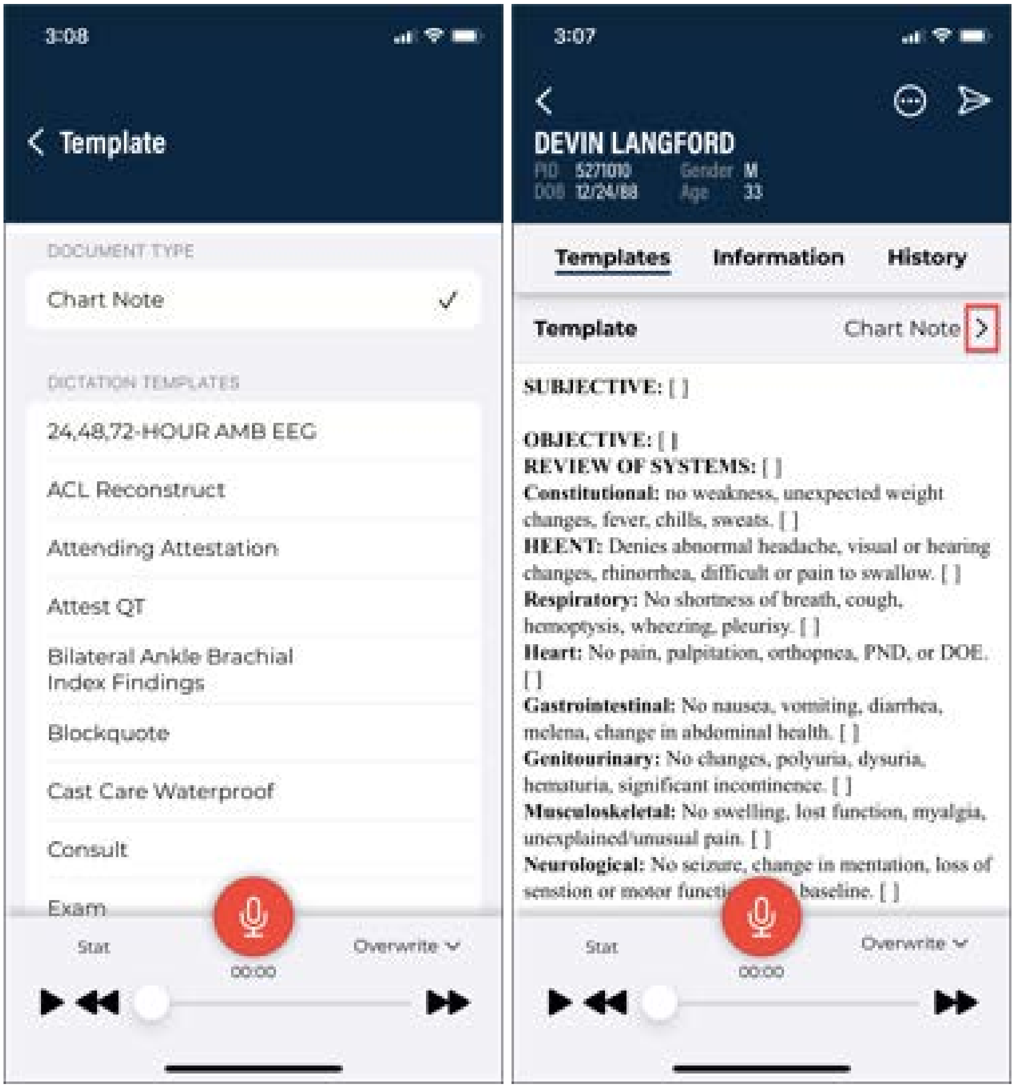
The Record Screen

The Record screen can be accessed from the Patients tab by selecting a patient/appointment or pressing the Add button.

The Record screen opens to the Template sub-tab by default, unless changed in Settings tab > Record Screen. If an appointment that already has an uploaded dictation from the same device is opened, the Record screen will open to the History sub-tab.

The top header section of the Record screen contains basic patient information, including the patient name, Patient ID, gender, birth date, and age. When a new dictation is created and a patient identifier has not been entered, the header information will display "New dictation" instead of a patient name. The screen has three tabs: Templates, Information, and History.

Templates Tab



The Templates tab displays Document and Dictation templates to be referenced during dictation. To view the full text of a template, tap the arrow to expand the list of available templates then tap the desired template. A document type must be selected in the Info tab to view the document template.

The Info Tab

The Info tab contains information about the patient and appointment, divided into five sections.

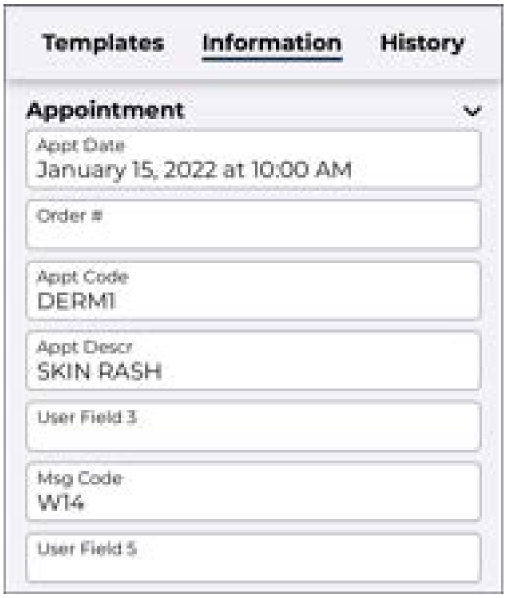
Document Type - Allows user to edit the document type associated with this dictation. Tap on the field and make a selection from the provided list to add or change the document type. This field is highlighted in yellow when a selection has not been made and is required prior to uploading the dictation.

Location - Allows user to edit the location associated with this dictation. The facility scheduling software or EMR can also set the location for an appointment. This location will appear by default but can be changed. Tap on the field and make a selection from the provided list to add or change the location. This field is highlighted in yellow when a selection has not been made and is required prior to uploading the dictation.

Only the document type and location can be edited for dictations created from an appointment in the appointment list.

> **Tip**
>
> Use the Settings tab to set default and favorite document types and locations. See Settings Tab for details.

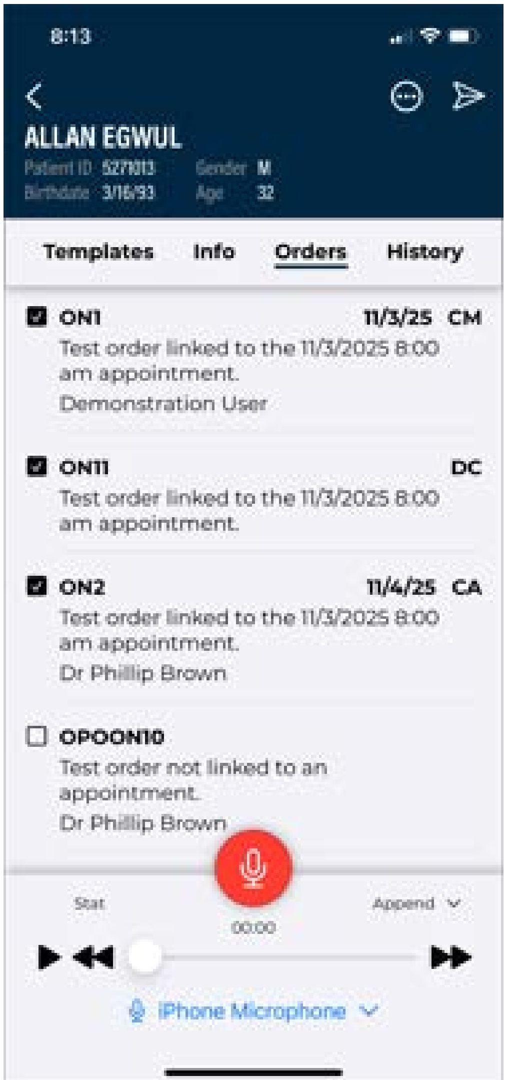
Demographic Information - Displays patient information. The user cannot edit these fields for an existing appointment.



Appointment - Displays any additional information about this appointment. The user can make changes to Appointment Date and Time for new dictations, but not for appointments selected in the Patients tab.

Confirmation Information - Displays the Receipt Code and Transcription ID for this dictation. If more than one dictation has been uploaded for this appointment on this device, the most recent confirmation information will be displayed. eScription One Mobile fills in the Receipt Code and TID fields after uploading the dictation; these fields cannot be changed by the user.

Orders Tab



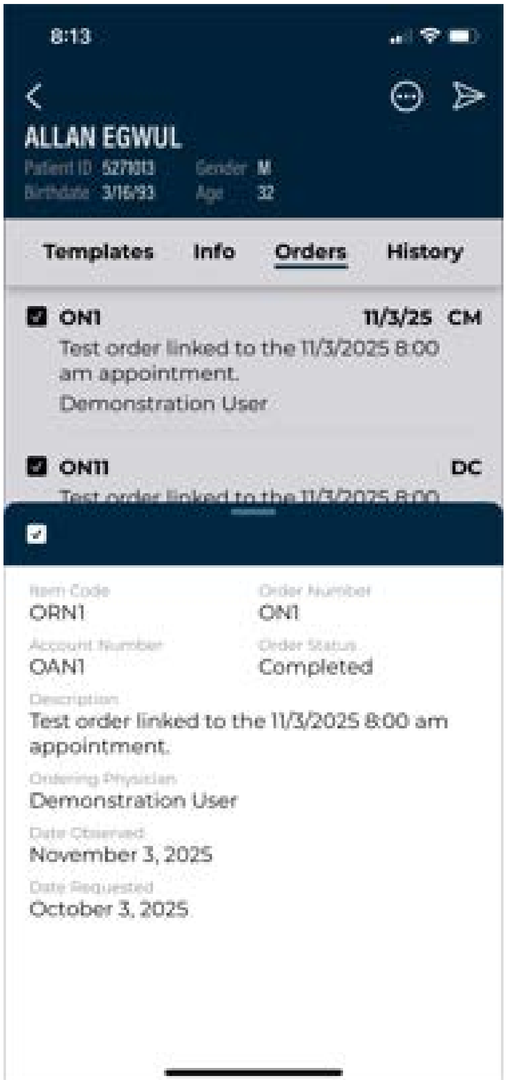
For document types that support the orders workflow, orders can be viewed and selected **prior to dictation upload**. This functionality ensures orders are associated correctly during dictation and reduces the need to attach orders after upload.

The Orders tab displays a list of available orders with the following information for each order:

- Order Number
- Date Observed
- Order Status
- Order Description
- Ordering Physician

Tapping an order opens additional order details for review:

- Item Code
- Account Number
- Order Status



The orders list and details panel have a checkbox. Tapping the checkbox selects or deselects the order for attachment to the dictation. Orders checked (selected) at the time of upload will be associated with the dictation.

Orders may be preselected based on the method used to create the dictation. See Preselected Orders for more information.

Preselected orders can be deselected, and other available orders can be selected as needed prior to upload. Order selections remain editable until the note is uploaded.

Selecting Multiple Orders

Multiple orders can be selected for a single note. The same selection rules apply as in InQuiry:

- Only orders associated with the same appointment can be selected together, **or**
- Orders that are not linked to an appointment can be selected together

Orders associated with different appointments cannot be selected on the same dictation. If an order from a different appointment is selected, any previously selected orders will be deselected automatically.

Preselected Orders

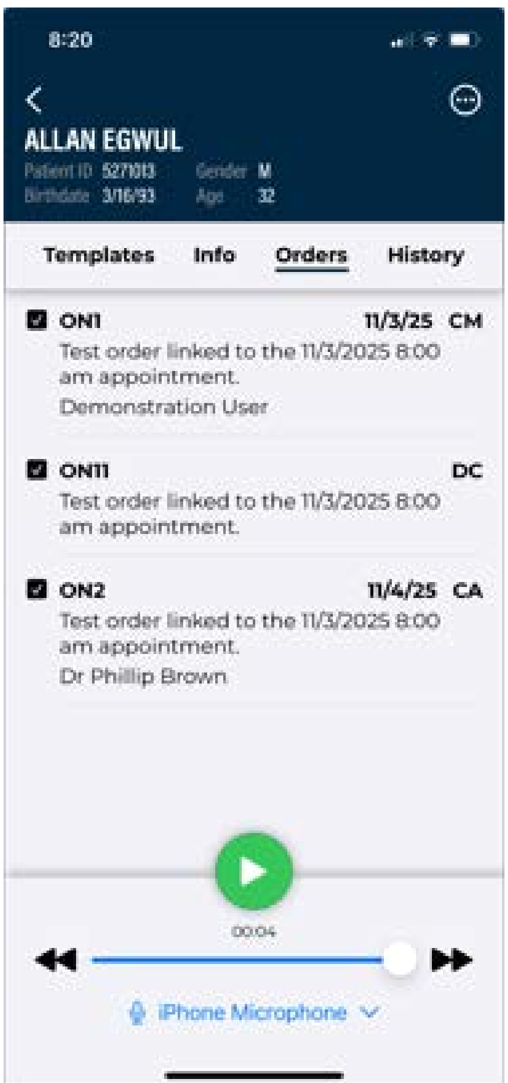
When dictating on an appointment from the schedule, orders linked to that appointment will be preselected automatically.

Orders can also be accessed when working outside the schedule, but the available orders and pre-selection will be determined by the method used to create the dictation:

- A patient is selected from the Patients sub-tab after performing a search.
  - All orders linked to the patient will be listed.
  - No orders will be preselected.
- An appointment is selected from the Appointments sub-tab after performing a search.
  - All orders linked to the same appointment or not linked to an appointment will be listed.
  - Orders linked to the selected appointment will be preselected.
- An ad-hoc dictation is created using the **Add** button.
  - All orders linked to the patient will be listed.
  - The orders preselected will depend on the patient identifier entered (Patient ID, Account Number, or Order Number, depending on document type configuration).
    - Patient ID - No orders will be preselected.
    - Account Number - All orders linked to the appointment associated with the Account Number will be preselected.
    - Order Number - The order matching the entered Order Number will be preselected.

Finalize the order selection by checking the boxes to attach orders or unchecking them to exclude orders.

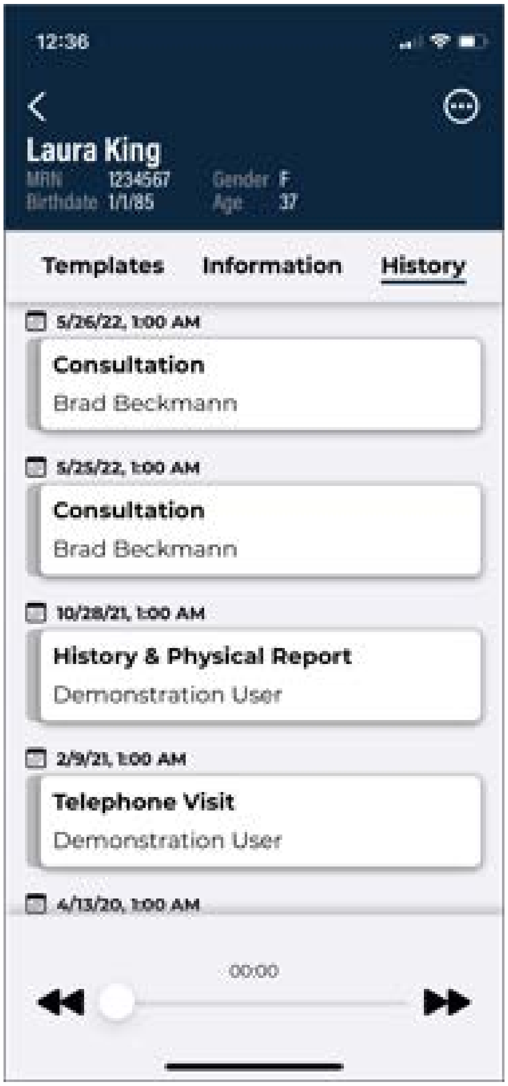
Viewing Orders After Upload

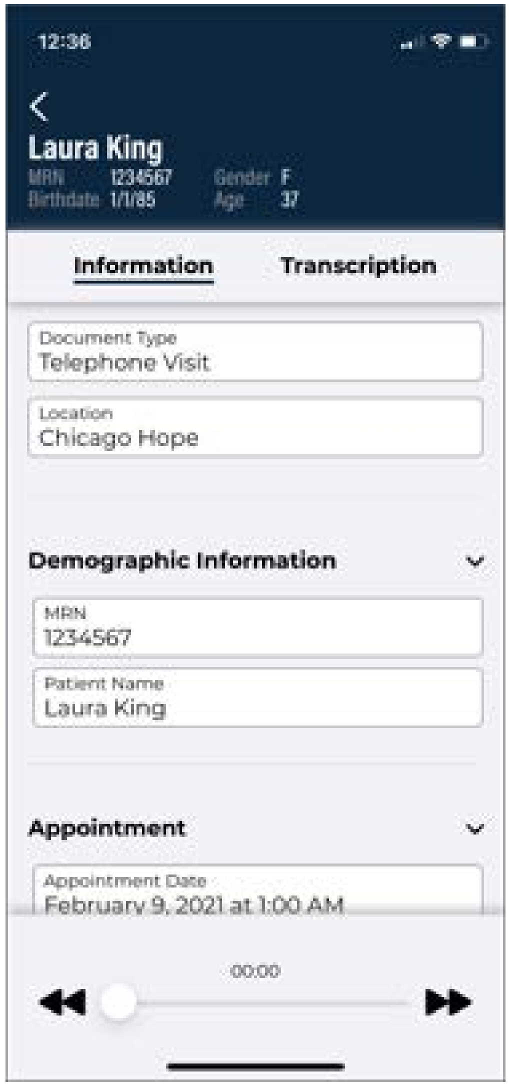


After upload, the Orders tab only displays the orders that were selected at the time of upload. Orders cannot be modified after upload.

The History Tab

Tap the History tab to display existing transcriptions that have the same Patient ID as the current patient. These transcriptions are available for reference while dictating, but cannot be edited from this screen.





Prior transcriptions are identified by document type, dictating clinician, and appointment date. Tap the desired appointment to view details, which are broken into two tabs: **Information** and **Transcription**.

The **Information** tab includes the following sections and corresponding data.

Please note that eSOne's Patient Display functionality has been extended within the mobile app to the patient history tab when recording a dictation. Patient Displays allow administrators to customize which fields are displayed based on a transcription's selected document type.

If configured, users will see different displays when viewing the information section on the patient history tab when recording a dictation.

If a document type includes read-only fields, these fields will appear on the screen in a light gray color and cannot be edited. The app will also check for required fields when saving or completing transcriptions. If one or more required fields is not filled out, a message appears indicating which ones. Names of required fields appear in red text.

At this time, Patient Displays only support the required fields setting for user fields.

Note

Please be aware that certain fields will always appear regardless of the document type, and some newer fields are not currently available for the mobile app and will not display.

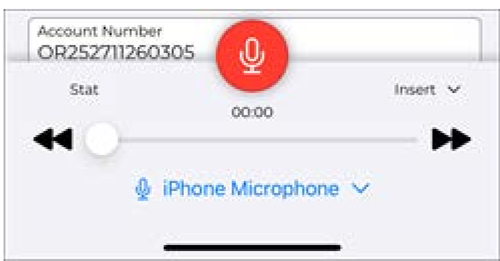
Default fields:

- **Document Type** - Displays the document type assigned to the transcription.
- **Location** - Displays the location assigned to the transcription.
- **Demographic Information** - Displays patient information.
- **Appointment** - Displays appointment details.
- **Dictation Information** - Displays Transcription ID, Date Dictated, and the dictating Clinician.
- **Comments** - Displays comments and comment tags on the transcription, if the user is granted permission to view comments.
- **Signatures** - Lists signatures on the transcription and date signed (no date appears if the transcription has not yet been signed).
- **Associates** - Lists all copied associates on the transcription.

The **Transcription** tab displays the transcription text.

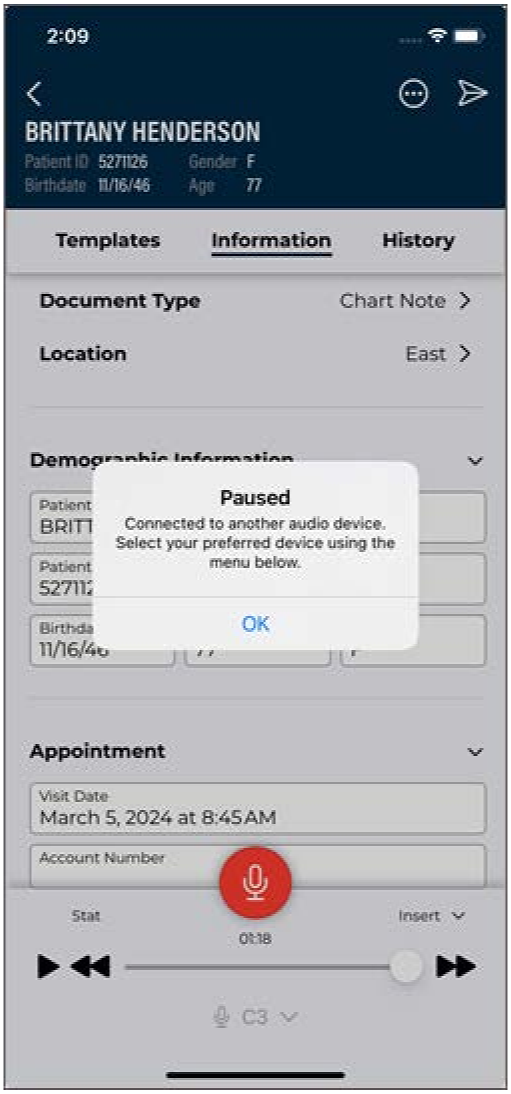
To return to the list of prior transcriptions, tap the back arrow in the upper left corner of the screen.

Recording Controls



The recording and audio controls appear at the bottom of the Record screen of all three tabs. There is a **progress bar** and buttons for **Record**, **Play**, **Rewind**, and **Fast Forward**. Tap the **Record** button (red microphone) to begin recording; the record button will then become a **Pause** button. Tap the **Pause** button to pause recording; recording can be resumed by tapping the record button again.

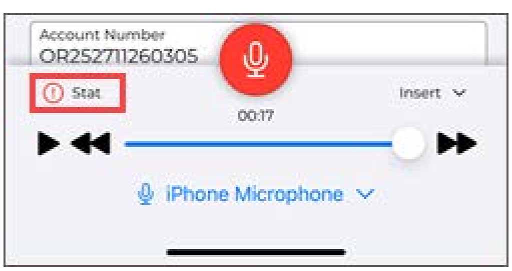
The active recording device (microphone) is displayed at the bottom of the screen. If multiple Bluetooth devices are connected, the recording device can be changed. Tap the device name to open the list, then tap the desired device. The selected device will be remembered as the preferred device and will be used for subsequent dictations, if still connected.



When a Bluetooth device is connected or the connection is lost during dictation, recording will automatically pause and a notification will be displayed. Close the notification, verify the desired device is selected, then press **Record** to resume dictating.

Tap the **Play** button to play back the dictation. The selected recording device will also be used for playback if the device supports audio output. Use the **Rewind** and **Fast Forward** buttons to navigate within the location of the dictation in increments of 5 seconds per button press. Alternatively, the dictation slider can be used to navigate to the desired dictation location.

Underneath the Record button, the **Progress Bar** shows which part of the dictation is currently playing or being recorded. The slider can be dragged to play different parts of the dictation or to insert or overwrite the dictation where desired.



The **STAT** button is to the left of the record button. STAT can be toggled on and off at any time prior to uploading the dictation. When a red circle with an exclamation mark appears next to the word 'Stat', the dictation is marked STAT.

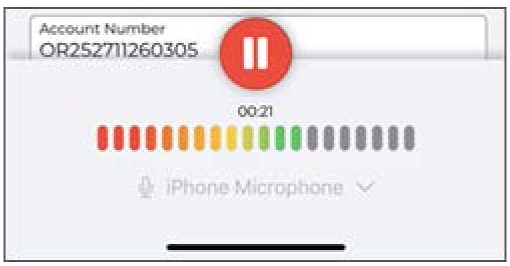
Note

Marking a dictation as STAT may increase the price for the transcription.

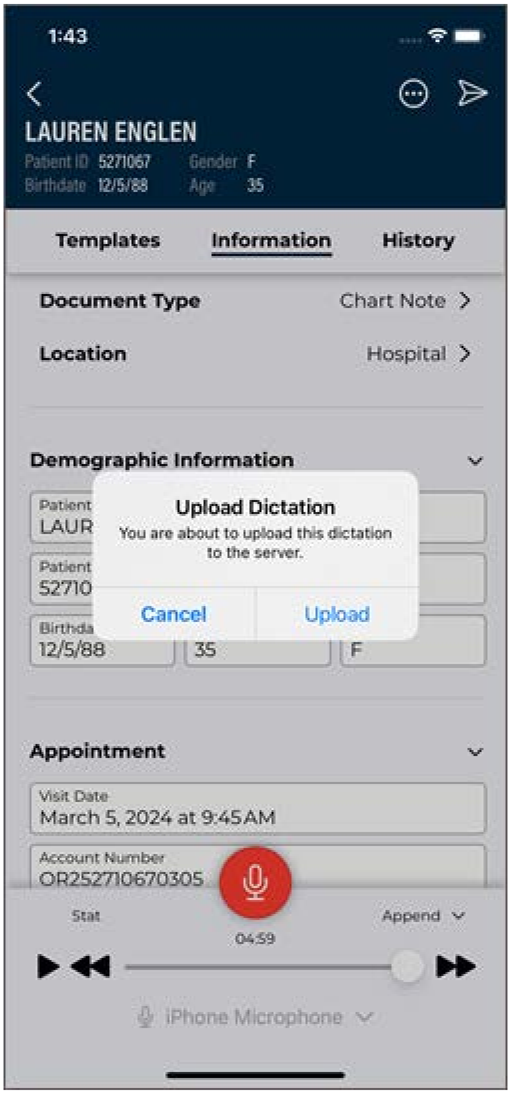
The current recording mode is displayed to the right of the Record button. Tapping the record mode opens a menu and allows the mode to be changed to one of the following options:

- **Append** (the default mode) - Adds new dictation at the end of the existing dictation regardless of where the dictation playback is.
- **Overwrite** - Allows the user to replace dictation from the selected playback position with new dictation.
- **Insert** - Adds additional dictation by inserting new dictation at the playback position.

Recording must be paused to change the record mode. The last used recording mode will automatically apply to the following dictation.



The **Voice Detection** bar replaces the progress bar while recording, showing the level of sound detected. The higher the volume of the dictation received, the further the colors progress from red to green. The Silence Detection option can be enabled in the Settings tab; recording will automatically be paused if continuous silence is detected for the set number of seconds while recording.



The  **Upload** button submits a dictation for transcription. Uploaded dictations cannot be edited in the eScription One mobile app. This button only appears after a dictation has been started.

The **back arrow**, located in the top left corner of the record screen, allows the user to **Save** the dictation and return to the Patients tab without uploading the dictation. Saved dictations can be reopened, changed, and uploaded. If the user leaves dictations on the device for longer than three days without uploading, eScription One Mobile displays a reminder.

The **Menu** button also appears in the upper right corner after recording has started. Tapping the Menu button opens a menu with the following option:

Delete Audio - Deletes the dictation file. eScription One Mobile displays a warning screen to confirm removal of the dictation. An appointment from an uploaded schedule will remain on the Patients tab after the dictation has been automatically removed. Deleting audio on a new dictation removes the appointment from the schedule.

If a dictation has not been started, the option **Hide Appointment** appears in the menu. This option removes the appointment from the Patients tab. To view the appointment again, add Hidden Appointments to the status filter in the Patients tab (the appointment will be marked with the hidden appointment icon). Opening the hidden appointment and tapping the menu button will give the option to unhide the appointment.

> **Note**
>
> The options available from the Menu button change depending on the status of the dictation.

New Dictation: If it is necessary to create an additional transcription for an appointment, return to the Patients tab and select the appointment.

Press the Menu button and select 'New Dictation'. Select Document Type and Location, then record normally.

Press the Upload button and eScription One Mobile will prompt for the dictation type:

- **Append** - Attach this transcription to the end of the prior transcription.
- **Prepend** - Attach the new transcription to the beginning of the prior transcription.
- **Upload as New Dictation** - Upload this dictation as a standalone transcription. This transcription will not be attached to any prior transcriptions.

Uploading Dictations

Once a dictation is recorded, it must be uploaded to be processed. To upload a dictation, ensure the device has a stable internet or Wi-Fi connection and tap the **Upload** button.

If the network or Wi-Fi connection is lost during the upload process, the upload will pause automatically. Once the connection is restored, the upload will resume from where it left off, ensuring the dictation is successfully delivered without requiring any manual intervention.

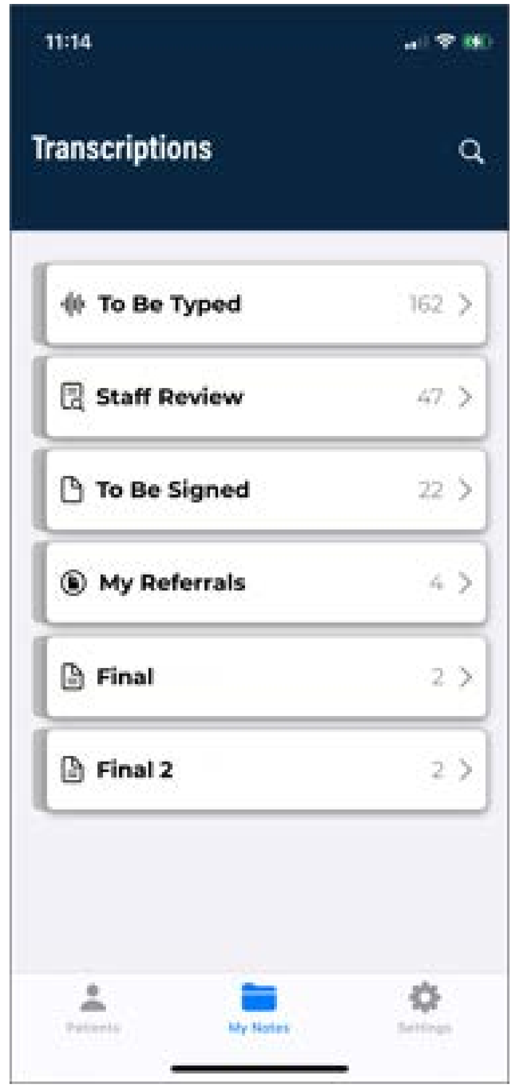
For best results, it is recommended to upload dictations when connected to a reliable Wi-Fi network to prevent interruptions and ensure timely processing.

My Notes Tab

My Notes tab provides a view similar to the workflow summary in InQuiry. Use this tab to review, complete, or edit notes.

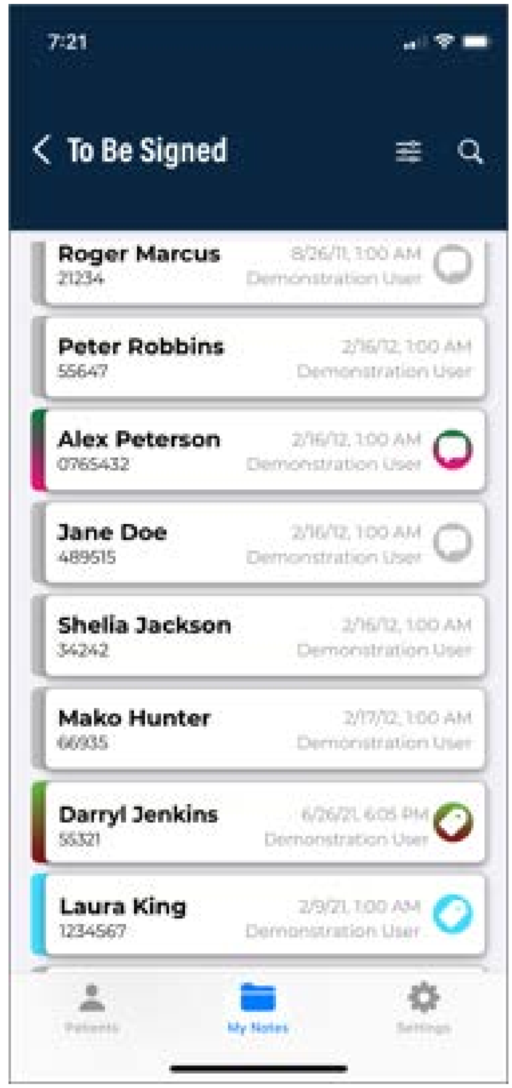
The main notes screen gives an overview of how many notes appear in each workflow folder. The workflow folders display the label name assigned by your medical facility. The first folder, here called "To Be Typed", contains dictations that are at the note company, but have not yet been delivered as a note.

Use the **Search** button in the upper right corner of the main notes screen to search for notes in any workflow folder, including notes that have completed the workflow. Tap the **back arrow** to return to the main notes screen. See Note Search below for more details on performing a note search.



The Folder View

Tap on any of the folders on the main notes screen to show a list of the notes that are currently in that stage of the workflow. The workflow folder name is displayed at the top of the screen. To return to the summary list of all workflow folders, tap on the back arrow or name of the current folder.



When a workflow folder is opened, the patient name, patient ID, appointment date and time, and dictating clinician's name are shown for each note in that folder. An additional user field can be added to the folder view from the Settings Tab. If a patient has not been added to a note, the patient name field will display as "No Patient"; if a patient ID has been entered without a linked patient name, the patient name will display as "No Patient Name".

The list of notes can be sorted by Date Dictated, Patient Name, or Appointment Date by pressing the **Filter** button and making a selection.

Comments and Comment Tags

Comments and Comment Tags are messages that can be placed on a note. Comments are free-form text, whereas Comment Tags are predefined notes. Notes with Comments and/or Comment Tags will display an icon on the right side of the note.

The following icons are used to indicate which type of comment or tag is on the note:

 The note has Comments only.

 The note has Comments and one Comment Tag.

 The note has one Comment Tag and no Comments.

 The note has multiple Comment Tags and no Comments.

 The note has multiple Comment Tags and Comments.

If the medical facility has assigned colors to comment tags, those colors appear on the left tab of the note, as well as in the comment icon. Instead of reading the tags, users can simply look at these visual cues and know which tags have been assigned. If multiple comment tags are on the note, the note and icon will be multi-colored.

Comments and Comment Tags cannot be read from the folder view. Open the note viewer to read the comments/tags. Note Comments and Comment Tags can be read in the mobile app, but not edited. Please use InQuiry if edits are needed on those items.

Completing Notes from the Folder View

Completing a note from a workflow folder progresses it to the next stage of the workflow. When a note is completed from the Preliminary folder it is considered signed. Notes being completed from the final stage of the workflow will be saved in the repository.

Notes can be completed as a group or individually from the folder view to advance to the next stage of the workflow (if allowed by the medical facility).

To complete all notes in the folder, long-press a note until the Menu button appears in the upper right corner. Tap the **Menu** button then select **Complete All**. At least one note must be selected for the Menu button to appear; when Complete All is tapped, all notes will be completed, not just the selected notes.

If a note search is performed prior to using Complete All, only the notes in the search results will be completed from the workflow folder. Other jobs that are in the folder but did not appear in the search results will remain in the workflow folder.

To complete only selected notes, long-press each note to be completed until a check mark appears on the left tab of the note. Tap the **Menu** button in the upper right corner of the screen (this button will not appear until at least one note has been selected) then tap Complete Selected.

Depending on the setup of the medical facility, some notes cannot be completed with Complete All/Selected, such as jobs with incomplete fields in the note text, failed validation rules, or those requiring an attestation statement. In this case, a message will be presented to the user stating how many notes could not be completed. Those notes will remain in the workflow folder and will need to be completed from the note viewer, while the other notes will proceed through the workflow.

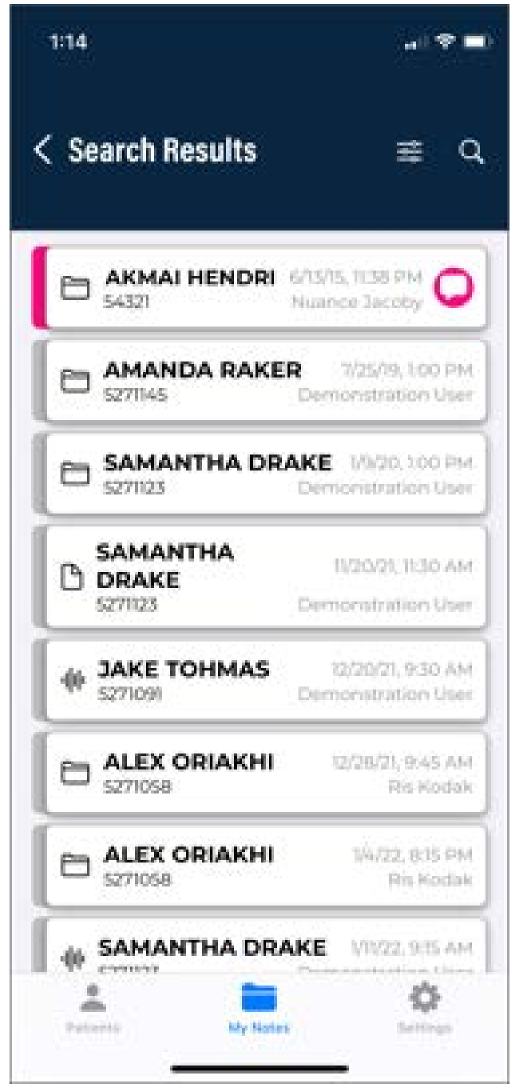
The completion of a note cannot be undone. The Complete All/Selected options will be available to you based on the settings of your facility and user account. eSOne Mobile will present a confirmation prompt before completing the notes with Complete All/Selected; this prompt cannot be disabled.

Note Search

Note searches can be performed within a specific workflow folder or across all workflow stages and can be based on a number of criteria.

Use the **Search** button in the upper right corner of the main Notes screen to search for notes in any workflow folder (except Referral), including notes that have completed the workflow. This is known as **Search All**. Select or type in the desired search parameters, then tap the **Search** button to run the search. A list of results will appear. To return to the main Notes screen, tap the **back arrow**.

If a note is in the Marked for Review and Marked for Review 2 folders or Final and Final 2 folders it will appear in the search results twice.



The **Search All** results will each have an icon on the left side that represents where the job is in the workflow:

Dictation Status - The dictation is still being typed by the transcription company.

Marked for Review/Marked for Review 2 - The note has been delivered to the medical facility and is in one or both Review folders.

Preliminary - The note is ready for clinician review and signature.

Final/Final 2 - The note has been signed and is in one or both Final folders for additional processing (printing, faxing, etc.)

Repository - The note has completed the workflow. This is also known as Search All. The Folder field in the Information tab will be blank.

> **Note**
>
> The facility can customize the workflow and may not use all of the above folders.

To search only a specific workflow folder, tap the desired folder from the main Notes screen, then tap the **Search** button. Select or type in the desired search parameters, then tap the **Search** button to run the search. A list of results will appear.

Search results can be sorted by Date Dictated, Patient Name, or Appointment Date, by tapping the Filter button.

Tap an item from the search results list to view the note details and text.

Tap the **back arrow** to return to the workflow folder view without the search criteria applied.

Note Viewer

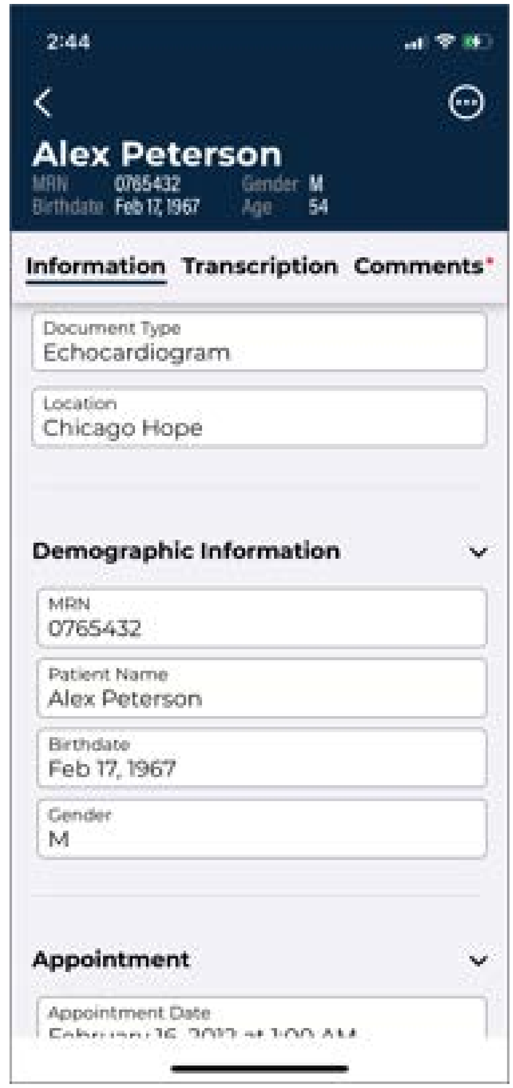
Tap on one of the entries in any workflow folder or search results to view the note text and details. The Patient Name, Patient ID, Gender, Date of Birth, and Age are displayed in the top. Tap the **back arrow** above the patient name to return to the folder view or search results. The Action Menu button appears in the upper right corner.

Recorded dictations are stored on the phone for two weeks after the dictated date, but they cannot be listened to from the note viewer. To listen to a recorded dictation that is still saved on the device, go to its entry in the Patients tab.

The Note Viewer has three tabs: Information, Note, and Comments. Tap on the desired tab to open it, or swipe left or right to switch tabs. The Note Viewer opens to the Notes tab by default. The tab that is being displayed is underlined.

Information Tab

The Information tab contains header information about the note and is broken into sections, similar to the Information tab on the Recording screen.



Please note that eSOne's Patient Display functionality has been extended within the mobile app to the information sections of a note. Patient Displays allow administrators to customize which fields are displayed based on a note's selected document type.

If configured, users will see different displays when viewing the information sections of a note.

If a document type includes read-only fields, these fields will appear on the screen in a light gray color and cannot be edited. The app will also check for required fields when saving or completing notes. If one or more required fields is not filled out, a message appears indicating which ones. Names of required fields appear in red text.

At this time, Patient Displays only support the required fields setting for user fields.

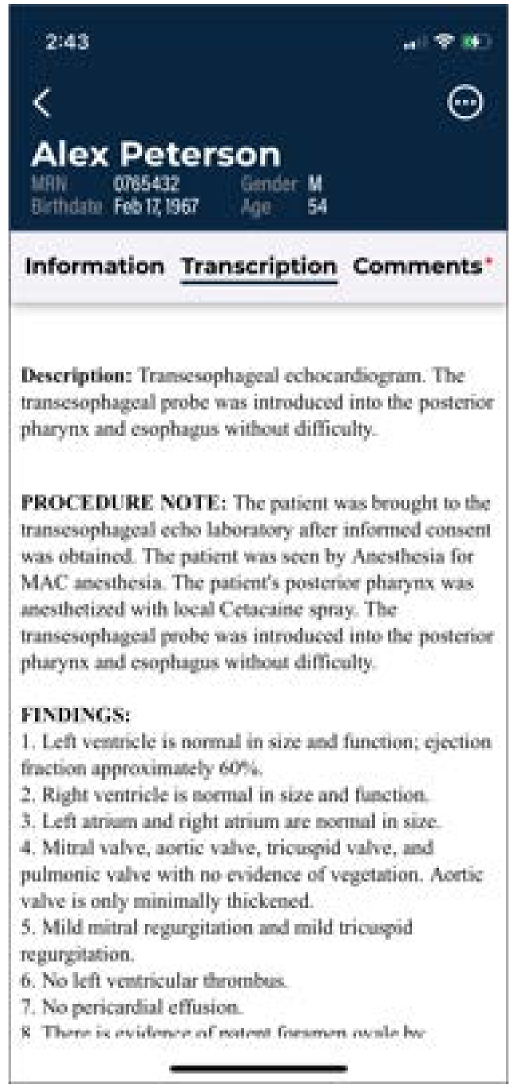
> **Note**
>
> Please be aware that certain fields will always appear regardless of the document type, and some newer fields are not currently available for the mobile app and will not display.

Default fields:

- **Document Type** - Displays the document type of the note.
- **Location** - Displays the location of the appointment for the note.
- **Demographic Information** - Displays patient name, MRN, birth date, age, and gender.
- **Appointment** - Displays details related to the appointment, including the appointment date.
- **Dictation Information** - Displays the workflow folder the note is currently in, note ID (formerly known as "Transcription ID"), date dictated, and the dictating clinician.
- **Signatures** - Lists all clinicians who will sign the note. The date signed will appear next to or below the signing clinician's name after it has been signed.
- **Associates** - Lists all associates to receive a copy of the note.

Note Tab

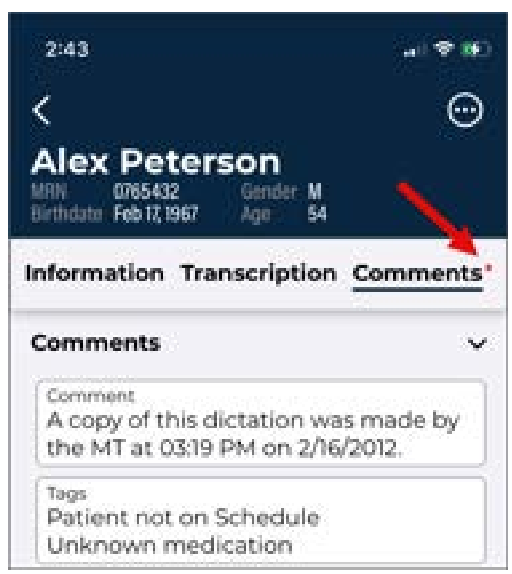
The Note tab within the Note Viewer displays the text of the note.



Comments Tab

The Comments tab displays comments and comment tags on the note. The Comments tab will not appear if the managing transcription company or facility has not granted access to the user.

A red dot will appear on the Comments tab if the note has at least one comment or comment tag.



Action Menu

Tap the **Action Menu** button in the upper right corner to create a new dictation, edit, or complete a note.

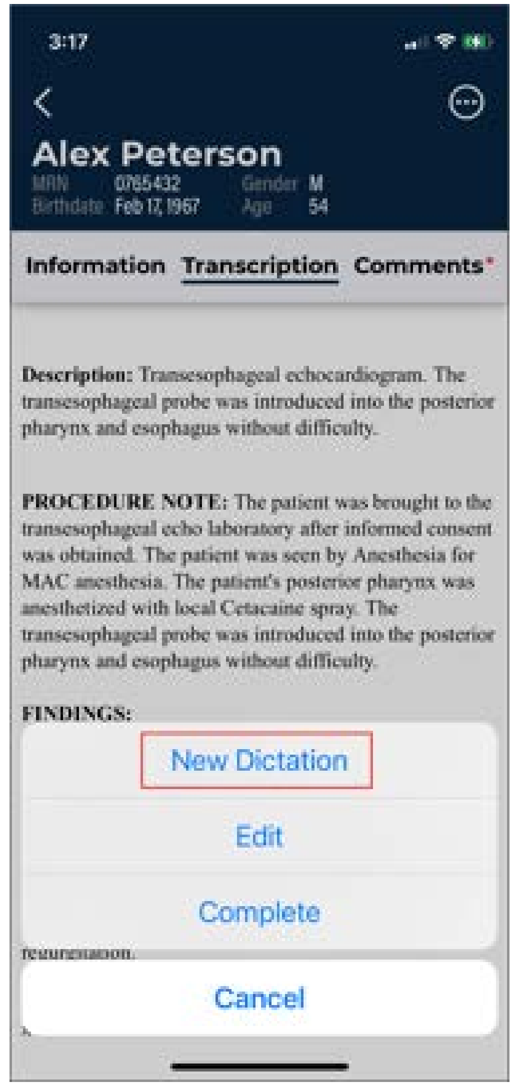
New Dictation

Tap the **Menu** button then **New Dictation** to start a new dictation with the same demographic information as the original document. The Recording screen will open with the patient and demographics populated. The appointment date can be changed. Record the dictation as normal (see Dictating with eSOne Mobile for iOS).

When the new dictation is uploaded, a prompt will be presented to determine how or if the new dictation should be linked to the original note. The options are:

- **Append to Dictation** - The note text from the new dictation will be added to the end of the original note.
- **Prepend to Dictation** - The note from the new dictation will be inserted before the original note text.
- **Upload as a New Dictation** - The note text from the new dictation will not be linked to the note text from the original note; they will both appear as separate notes.

The new dictation will create a separate note and note ID when appended or prepended, but will be linked to the original note. The two notes will appear as one when viewed (after the new dictation has been typed and delivered by the transcription company).

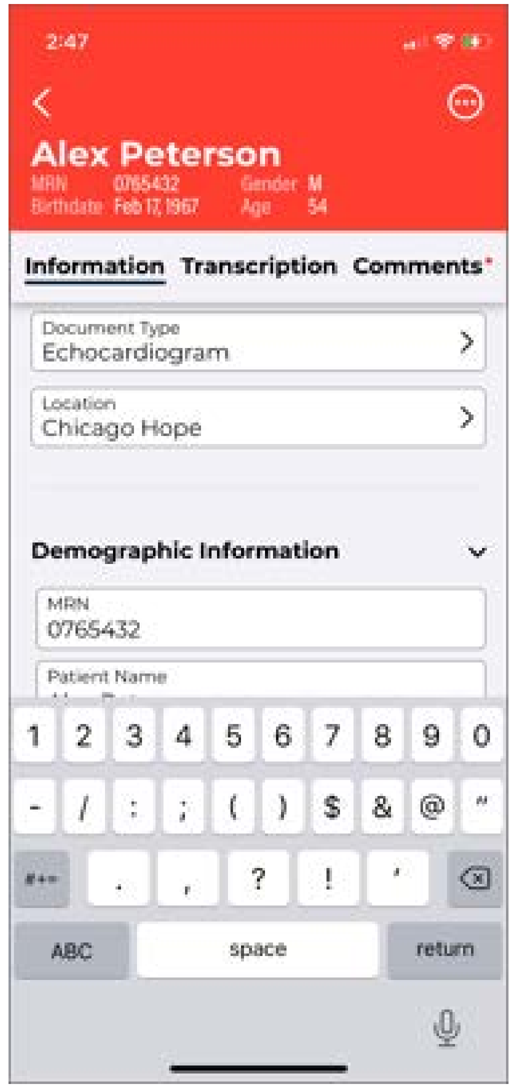


Edit

The note text and demographics can be edited to correct mistakes or add additional information. By default, only documents that are in the Marked for Review and Preliminary Folders can be edited. The Edit option in the eSOne mobile app is intended for small or minor edits. If more extensive editing and formatting is needed, consider using InQuiry on a desktop computer.

To access the Edit screen, tap the **Action Menu** button at the top right corner of the note viewer, then choose **Edit**. The top header area will become orange and the note text and demographic fields will be editable.

To edit demographic fields, tap the Information tab while in edit mode. Tap on the field to open the keyboard or selection list, depending on the field type selected. The signatures, associates, comments, and comment tags cannot be edited in the eSOne mobile app; please use InQuiry to make those changes.



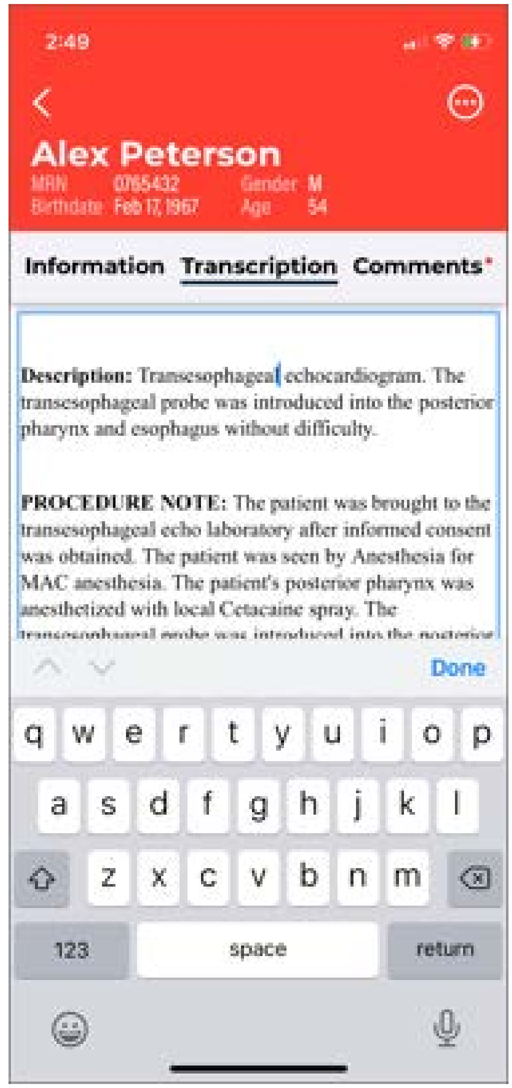
To edit the note text, tap the **Note** tab while in edit mode, then tap the note text to position the cursor and open the keyboard. A blinking cursor will mark the cursor position.

Tap the **Action Menu** then **Undo Changes** to cancel all unsaved changes made to the demographics and note text and return to the note viewer.

Switching between the Information and Note tabs in edit mode will not lose unsaved changes to either tab, but it is recommended to save often.

Use **Save** in the Action Menu to save changes to the demographics and note text and return to the note viewer. Tapping **Complete** in the Action Menu while editing will save changes and complete the job from the workflow folder.

If navigation back to the workflow folder is attempted prior to saving changes, a confirmation dialog box will be presented with the options to Cancel or Discard. To return to the editor to make additional changes and/or save changes, tap **Cancel**. To return to the workflow folder list without saving changes, tap **Discard**.



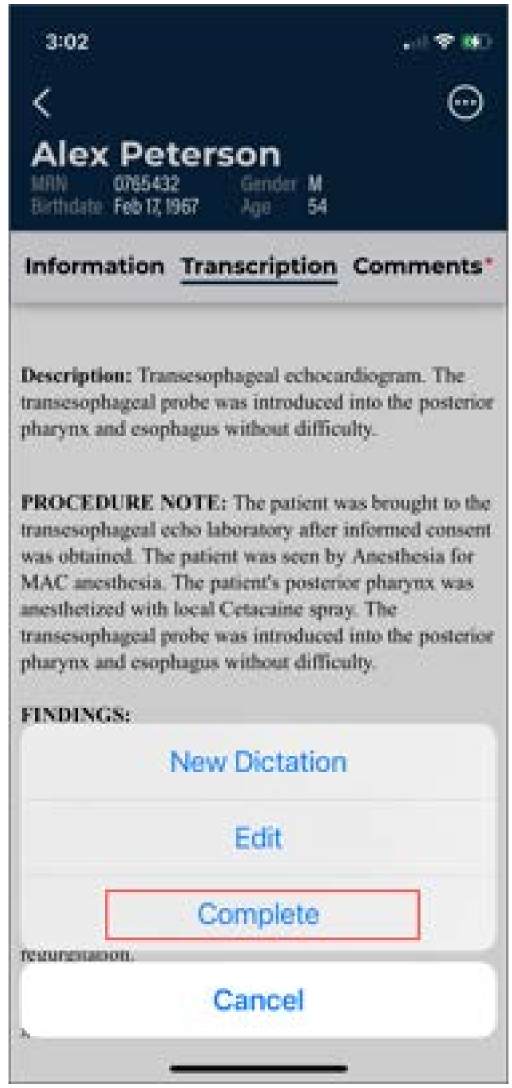
> **Note**
>
> Changes are not saved automatically.

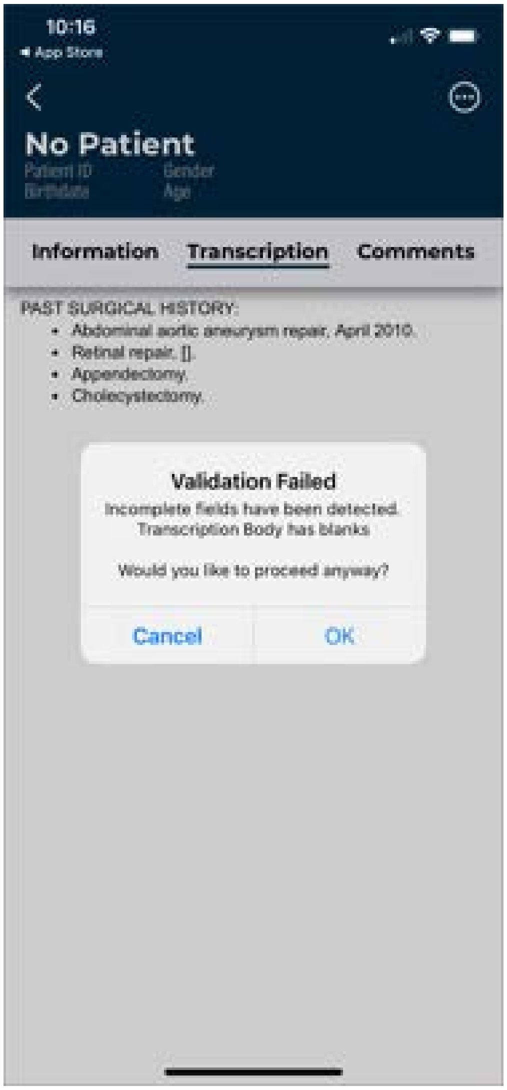
Complete

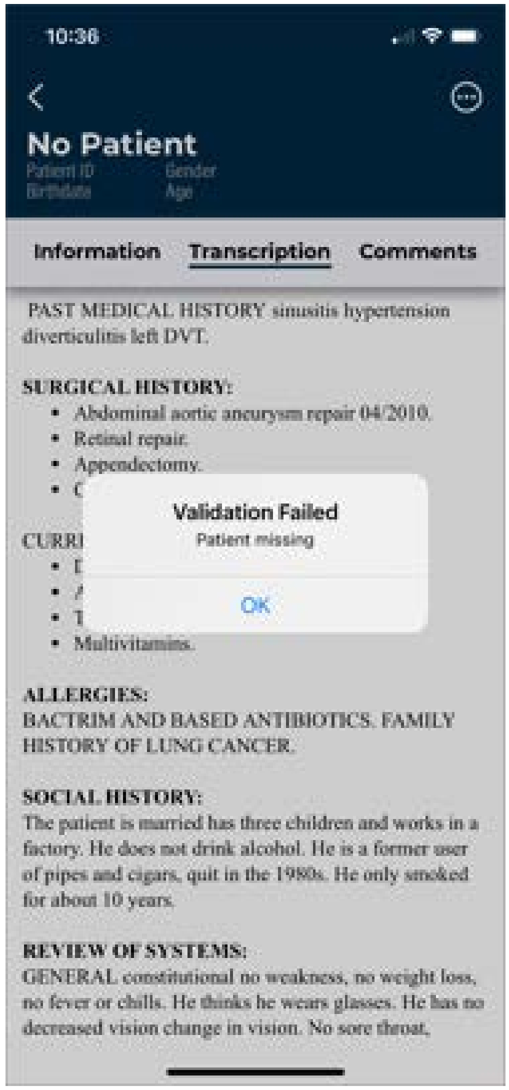
Tap the **Action Menu** then **Complete** to progress the note to the next stage of the workflow. When the document is Completed from the Preliminary folder by the dictating clinician or additional authenticator, the electronic signature is also applied, if the provider is using that feature. When the document is completed from the final workflow folder, the note will be saved in the repository (also known as Search All).

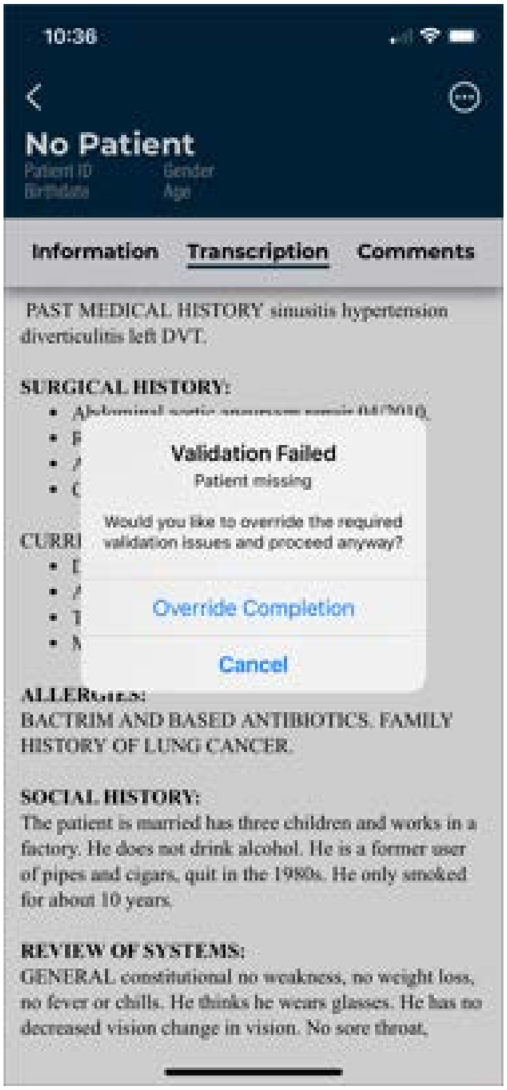
When the note cannot be completed due to incomplete fields within the note text, a notification will appear. The Complete action will be canceled. The user can then enter edit mode to make the necessary edits, then complete the note.

If the client is using workflow validation rules and the job fails validation, a message will appear upon completion, stating which validation rule failed. Depending on the setup of the validation rule, a warning may be given, which allows the user to cancel the complete action to edit the note or continue with the complete action and leave the note as-is; if the validation rule prevents completion the user must edit the note to meet validation requirements, unless the user has the rights to override the prevention.




10:16
App Store
No Patient
Patient ID
Gender
Birthdate
Age
Information
Transcription
Comments
PAST SURGICAL HISTORY:
Abdominal aortic aneurysm repair, April 2010.
Retinal repair, [].
Appendectomy.
Cholecystectomy.
Validation Failed
Incomplete fields have been detected.
Transcription Body has blanks
Would you like to proceed anyway?
Cancel
OK


10:36
No Patient
Patient ID
Gender
Birthdate
Age
Information
Transcription
Comments
PAST MEDICAL HISTORY sinusitis hypertension diverticulitis left DVT.
SURGICAL HISTORY:
Abdominal aortic aneurysm repair 04/2010.
Retinal repair.
Appendectomy.
Validation Failed
Patient missing
OK
Multivitamins.
ALLERGIES:
BACTRIM AND BASED ANTIBIOTICS. FAMILY HISTORY OF LUNG CANCER.
SOCIAL HISTORY:
The patient is married has three children and works in a factory. He does not drink alcohol. He is a former user of pipes and cigars, quit in the 1980s. He only smoked for about 10 years.
REVIEW OF SYSTEMS:
GENERAL constitutional no weakness, no weight loss, no fever or chills. He thinks he wears glasses. He has no decreased vision change in vision. No sore throat,



The completion of a note cannot be undone. By default, eSOne Mobile will present a confirmation prompt before completing the note. This prompt can be disabled in the Settings tab.

Complete with Attestation

If the medical facility requires attestation statements from attending physicians (authenticators) signing notes, the Complete action becomes **Complete with attestation** in the Action Menu.

After tapping **Complete with attestation**, the Attestation editor opens. The last used attestation template will automatically load. To change to a different template, tap **Templates** in the bottom left corner or **Load Template** from the Action Menu in the upper right corner. A list of available attestation templates will be presented. Tap on the desired template to load it. If edits need to be made to the attestation text, tap within the text to position the cursor and open the keyboard.

To delete all attestation text tap **Remove Attestation**. The attestation text can then be manually typed in by tapping in the white editor area, or a template can be selected again.

After the attestation text has been finalized, tap the **Action Menu** then **Complete** to apply the attestation template and signature and advance the note in the workflow.

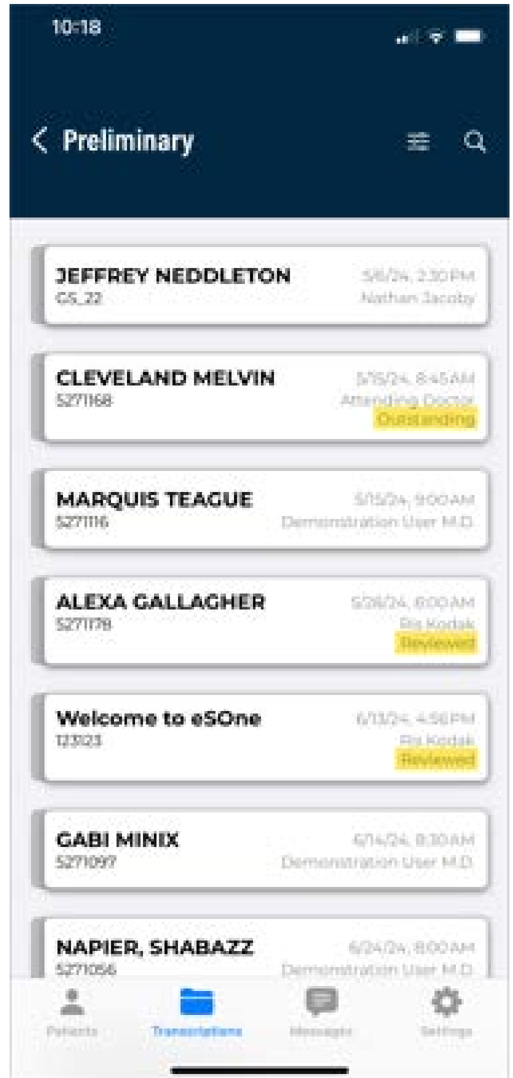
Cancel

The **Cancel** button in the Action Menu closes the Action Menu without taking any action.

Dual Resident Attending Workflow

If the facility uses the dual resident/attending workflow, attending physicians (authenticators) will be allowed to complete documents in the workflow even if the dictating resident has not yet reviewed or approved the document. With this option, documentation can be completed more quickly if needed.

In this workflow, a note requiring an extra signature(s) will appear in the resident's and attending's Preliminary folders at the same time. Either the dictating resident or attending physician can review and edit the document (provided they have proper rights to location and document type). A review status will appear in the note list of the Preliminary folder to indicate if the job has been reviewed by the dictating resident, as shown highlighted in the image. Notes not requiring an additional signature will not display a status.



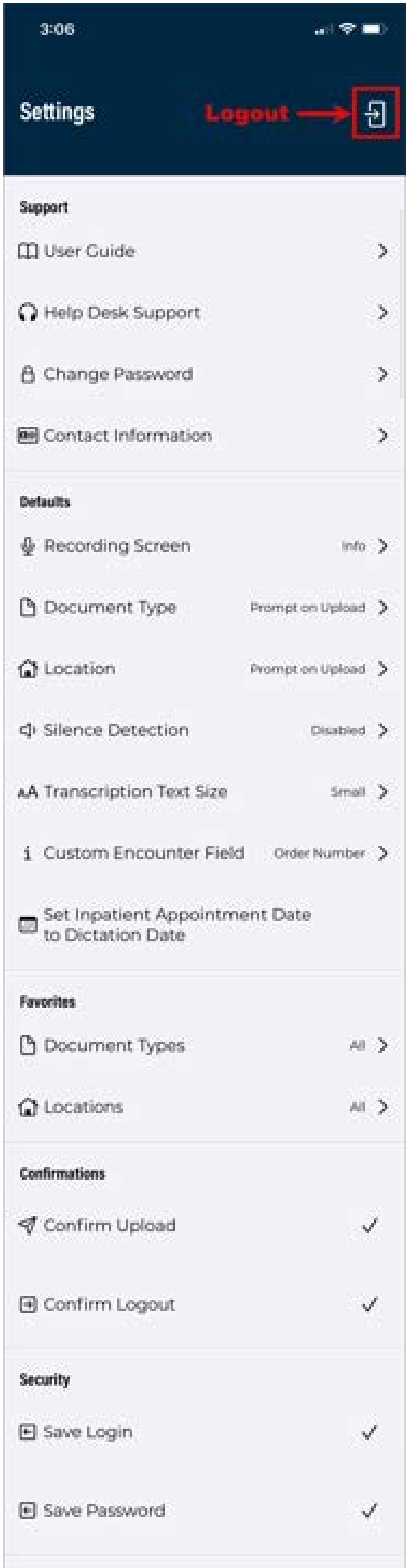
There are two paths this workflow can follow:

- Resident reviews/approves an outstanding note, then the attending completes.
  - The resident can see the note in the Preliminary folder with an "Outstanding" status and can review and approve the note. After the resident completes the job, it is removed from their Preliminary folder.
  - The attending will see the "Reviewed" status from the Preliminary note list and can complete the note. It will move on to the next workflow folder.
- Attending Completes an Unreviewed Note
  - The attending will see the note in the Preliminary folder with an "Outstanding" status prior to the resident reviewing/approving the note.
  - Once the attending completes the job, the note moves on in the workflow and out of their Preliminary folders. The next time the resident searches or refreshes their Preliminary folder, the note will not be available.

If the facility does not use the dual resident/attending workflow, notes will not appear in the attending physician's (authenticator) Preliminary folder until after the dictating resident has approved the note and the review status will not appear.

The Settings Tab

Use the Settings tab to set default screens and behavior for the eSOne Mobile application.



Logout

Tap the **Logout** button in the upper right corner to log out of the eSOne app.

Support

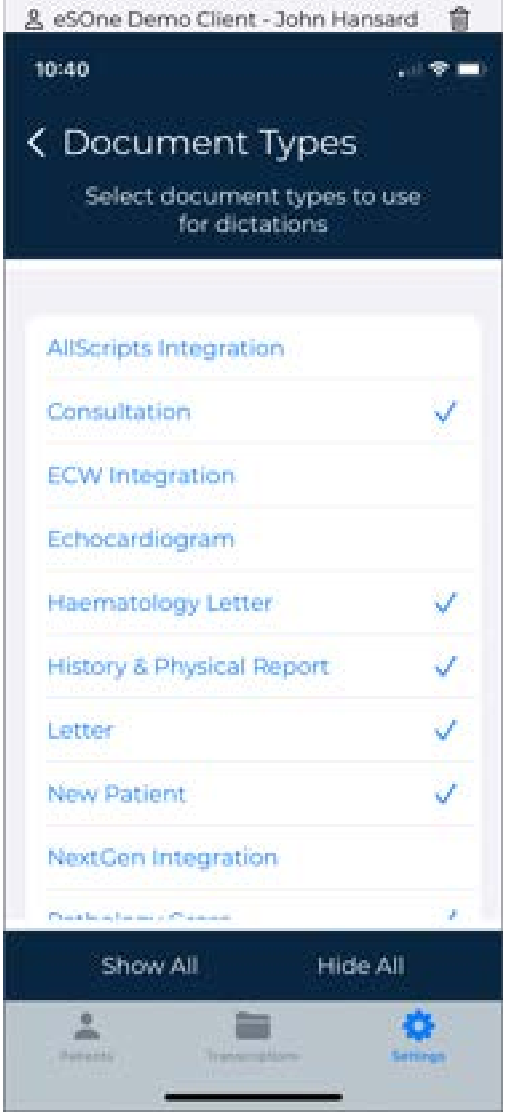
- **User Guide** - Click to open and view the user guide within the app. After viewing the guide, tap **Cancel** in the upper left-hand corner.
- **Help Desk Support** - Contains contact details for support, along with the version number of the mobile app.
- **Change Password** - If the password does not meet the password requirements set for the client, the screen will display which ones have not been met after the user presses the Change button. Remember that InQuiry, InSync, and eSOne Mobile all use the same password.
- **Contact Information** - Change and verify the user's email address. When the address is changed, an email will be sent to verify the new email address. Tap the **Resend** button in the upper right corner to resend the verification email. If the user does not have a verified email address the Contact Information text in the Settings tab will be red.

Defaults

- **Recording Screen** - Choose which tab is selected when opening a patient appointment: Templates, Information, or History. Information is selected by default until changed here.
- **Document Type** - Select a default document type for all dictations. The document type can be changed on each dictation if needed. If "Prompt on Upload" is selected, eSOne Mobile will prompt you to select a document type when uploading a dictation that does not have one selected. "Prompt on Upload" is the default setting.
- **Location** - Select a default Location for all dictations. The Location can be changed on each dictation if needed. If "Prompt on Upload" is selected, eSOne Mobile will prompt you to select a Location when uploading a dictation that does not have one selected. "Prompt on Upload" is the default setting.
- **Silence Detection** - Select the length of time silence can be recorded before eSOne Mobile pauses the recording. The default value is "None" and recording will not automatically pause when silence is detected.
- **Transcription Text Size** - Select how large text is when viewing a transcription. Please note that this setting does not change the text size in all screens of the mobile app.
- **Custom Encounter Field** - Select an additional data field to be displayed to the right of the patient name on the appointment listing.
- **Set Inpatient Appointment Date to Dictation Date** - In the inpatient workflow, auto-populate the Appointment Date with

the current date and time when the patient encounter is opened.

Favorites



- **Document Types** - Filter the document types that are available when choosing a document type for a dictation. If a facility has thirty document types, but a dictator only needs five of those document types, this setting is used to remove the other twenty-five from the list of document types. Tap the document name to toggle the favorite setting on (blue check mark) and off (no check mark).
- **Locations** - Filter the locations that are available when choosing a location for a dictation. If a facility has fifteen locations and a dictator only works at three of them, this setting is used to remove the other twelve from the list of possible locations.

Confirmations

- **Confirm Uploads and Confirm Logout** - Turn the confirmation pop-up for those actions on or off.

Security

- **Save Login** - Save the username to avoid having to enter it at each log in.
- **Save Password** - Save the password to avoid having to enter it at each log in. This option will be disabled if the client does not allow password saving.

> **Warning**
>
> When 'Save Password' is enabled, anyone with access to the device can access the eSOne account and the confidential medical records in it.

Accounts

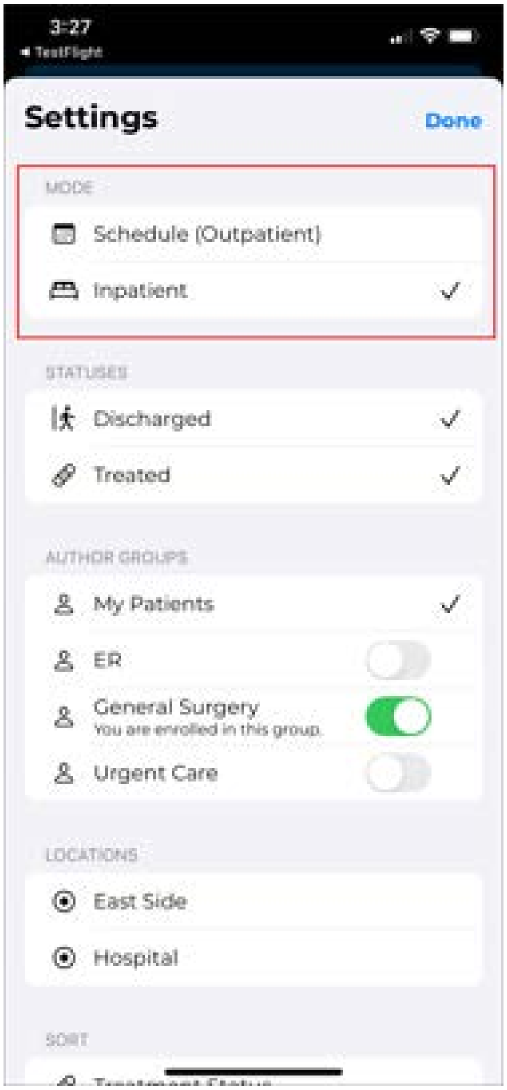
eSOne Mobile can access user accounts across multiple medical facilities by linking accounts. The Accounts list includes all Linked accounts and allows the user to quickly switch between user profiles.

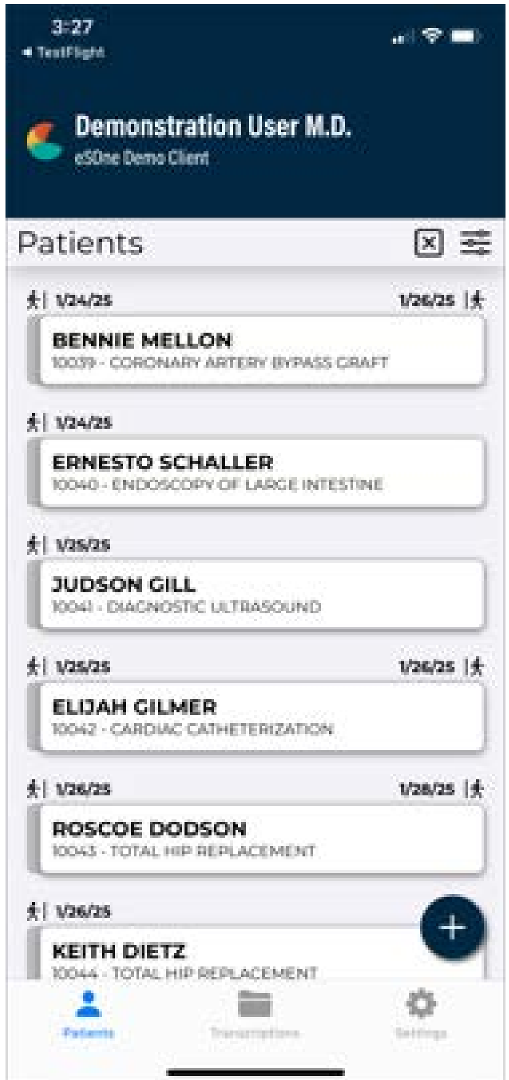
Tap **Add Account Site** to link a new user account. eSOne Mobile will prompt for the username, password and client for the initial setup. The new linked account will appear in the Accounts list with the full client name, followed by the user's first and last name.

To switch to a linked account, tap on the desired account profile; login credentials are not required to switch to a linked account where credential saving has been enabled. A check mark indicates the current logged-in account. Patients and transcriptions in those respective tabs will now show data for the current logged-in account only.

To remove a linked account, tap the **Delete** button next to the account to be removed.

Inpatient Workflow





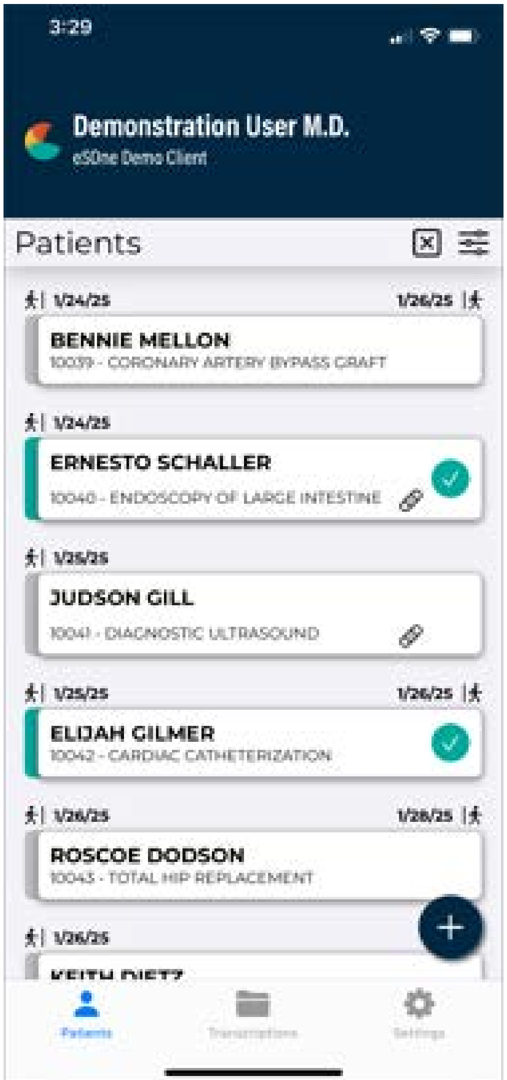
The inpatient workflow is an alternative scheduling method that lists patients based on inpatient encounters, rather than listing patients by appointment. This workflow feature is only available when enabled by the client, and is not available for all users.

For example, a physician is required to make regular rounds to all patients admitted to Critical Care. The inpatient workflow allows the physician to easily track which patients are on his ward, and if he has dictated on them today, or if he still needs to visit them. Inpatient also allows the physician to clear his schedule manually when he needs to see patients more frequently.

To switch between the standard appointment screen and the inpatient workflow, tap the **Filters** button on the upper right corner of the Patients screen, then tap **Inpatient** in the Mode section. To change back to the outpatient appointments view, tap the **Filters** button then tap **Schedule (OutPatient)**.

Patient List

The Patient List on the Patients tab provides a comprehensive overview of patients based on the filters and sorting criteria set by the provider. This list offers valuable information at a glance, allowing providers to quickly identify and select the correct patient for dictation, streamlining the workflow and enhancing efficiency in managing inpatient care.



Each patient encounter card includes essential identification details:

- **Admit Date** - When available, the admit date will be displayed above the patient card on the left.
- **Discharge Date** - When available, the discharged date will be displayed above the patient card on the right.
- **Patient Name**
- **Patient ID**
- **Encounter Data Field** - The contents of the encounter data field varies based on client configuration. It will appear next to the Patient ID.
- **Custom Encounter Field** - An additional data field can be added to the patient card by navigating to the Settings tab, tapping Custom Encounter Field, and selecting the desired field. The data will then appear to the right of the patient's name.
- **Treatment Status** - Indicates whether the patient has been treated, marked by a bandage icon. This status can be reset to help track which patients still need to be visited during each round of care.
- **Dictation Status** - Icons and color coding indicate if a dictation has been started, is uploading, or is completed. If no icon exists, a dictation has not been started on this device.

  Dictation on Hold - The patient has a started dictation that has not yet been uploaded.

  Uploading - The patient has a dictation that is currently uploading.

  Complete - The patient has a recorded dictation and has been successfully uploaded.

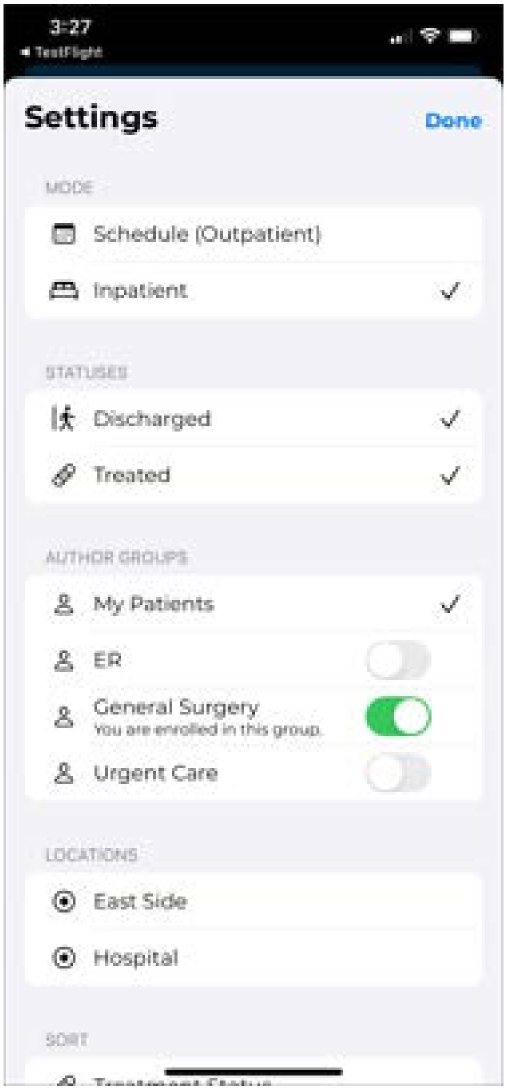
Additional buttons available on the Patients tab include:

Add - Add a new patient the Patient List. See Add and Remove Patients for more details.

Filters - Switch between Inpatient and Outpatient workflows, and select sorting, filters, and patient list views.

Clear Treatment Status - Reset the treatment status for all patients, marking them as untreated.

Inpatient Views



The default inpatient view is "My Patients" which lists all patients whose inpatient counter uses the work list scheduling resource assigned to the logged-in user. eSOne Mobile can also list inpatient encounters by Author Groups or Location Resource. To change views between My Patients, Author Groups and Locations, tap the **Filter** button. The Author Groups section will first list My Patients, followed by all Author Groups setup for the client. The Locations section follows, listing all inpatient location resources for the client. Tap on a view to load it in the Patients tab; a check mark will indicate which view is selected.

- **My Patients** - Displays all patient encounters linked to the default schedule resource of the logged-in user. This is the default view in inpatient mode.
- **Author Groups** - The Author Group view allows the provider to see all patients associated with any providers enrolled in the selected Author Group. By tapping on an Author Group name, the provider can view the full list of patients for that group, regardless of whether they are enrolled in the group themselves. Enrolling in a group enables other users within the group to view the provider's patients as well. To enroll or disenroll from a group, tap the slider button.
- **Locations** - Use Locations to show all inpatient encounters based on the location resource, regardless of the associated schedule resource.

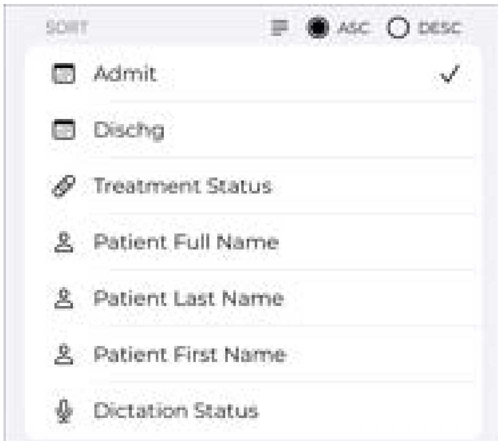
Filter Patient List

Patient lists can be filtered based on the status of the patient. When the filter is enabled, indicated by a checkmark, patients with that status will appear in the list. Both status filters, Discharged and Treated, are on by default, but can be disabled, hiding the patients with that status.

- **Discharged** - Patients have a date populated in the Discharge Date field. Unchecking this filter will hide discharged patients.
- **Treated** - Patients marked as Treated (by starting a dictation or manually marking the patient treated). Unchecking this filter will hide treated patients.

If a patient is both discharged and treated and only one of the filters is enabled, the patient will be hidden from the patient list.

Sort Patient List



Choose a sort option in the Filters screen to order the inpatient list. Each option can be sorted ascending or descending by choosing the desired setting above the Sort options list.

- **Admit** - Sort patients based on the admit date and time. When sorted ascending, patients without an admit date will appear first; when sorted descending, patients without an admit date will appear at the bottom of the list.
- **Discharge** - Sort patients based on the discharge date and time. When sorted ascending, patients without a discharge date will appear first; when sorted descending, patients without a discharge date will appear at the bottom of the list.
- **Treatment Status** - Patients not marked as Treated will appear at the top of the list, Treated patients will appear at the bottom.
- **Patient Full Name** - Patients will be ordered alphabetically by the patients' full names (if the first names match then the middle initial and/or last names will be used to further order them).
- **Patient Last Name** - Patients will be ordered alphabetically by the patients' last names, but will still appear in "First name Last name" format in the schedule list.
- **Patient First Name** - Patients will be ordered alphabetically by the patients' first names.
- **Dictation Status** - Patients will be ordered based on the status of the dictation. When sorting in ascending order, the status are arranged as follows:
    a. No Dictation
    b. On-hold Dictation
    c. Dictation Uploading
    d. Dictation Completed

If multiple patients have the same primary sort order value, they will be sorted alphabetically by full patient name. If those patients also share the same name, they will then be sorted by dictation status. However, if the primary sort order is set to patient name, the secondary sort order will be dictation status.

Treatment Status

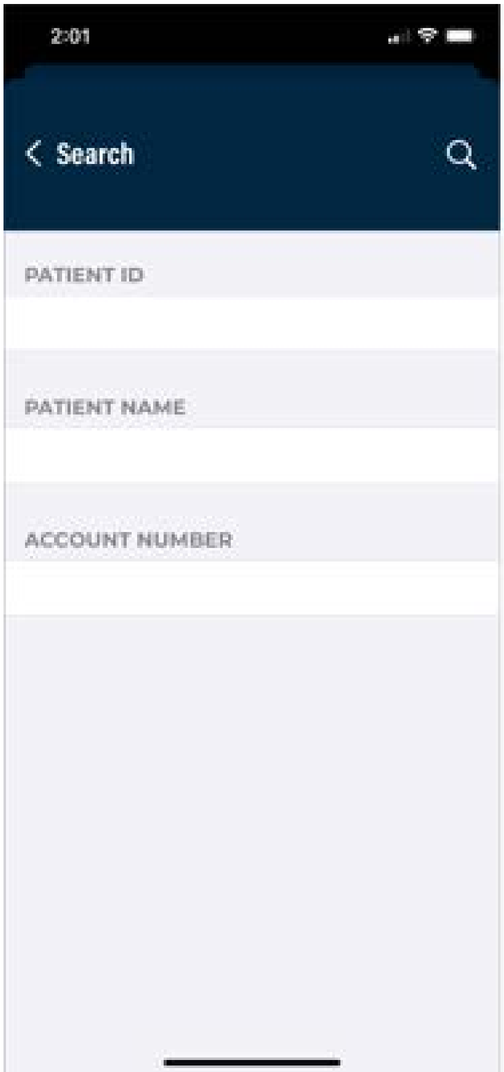
Patients who have received treatment are marked with a bandage icon.

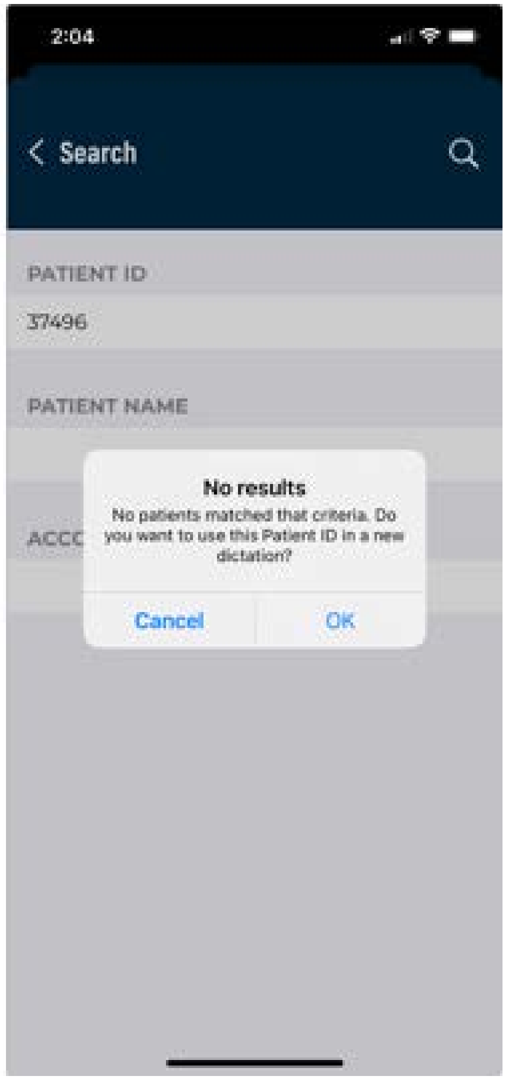
Patients are automatically marked as treated when a dictation has been started. The treatment status can be toggled on and off using the **Set treatment status** option from the Record Screen menu.

To remove the Treatment Status icon from all patients, press the Clear Treatment Status icon from the patient list.

Add and Remove Patients

Patients can be added to the inpatient list by tapping the **Add** button.





Search for an existing encounter by entering the Patient ID, Patient Name, and/or Order Number. Tap the **Search** button to run the search and view matches. Tap on the patient in the search result to begin a new dictation.

If the Patient ID was used for the search and no matches are found you will have the option to create a new dictation using the Patient ID. Tap **Cancel** to return to the Search window; tap **Use** to apply the search criteria to the appropriate fields in a new dictation.

To remove patients from a work list, choose **Remove from my work list** in the record screen menu.

Record Screen

To view encounter details and record a dictation, select the desired patient from the patient list. Recording controls are available at the bottom. When recording is completed, tap **Upload** in the upper right corner to submit the dictation.

Please see Record Screen for additional details on dictating from the eSOne Mobile App.

Date of Service

The record screen is similar to that of an outpatient appointment, with a minor difference in the **Date of Service**. The Date of Service, which is labeled as **Appointment Date** by default but can be customized by the client, can be set to reflect the date and time the patient was treated while admitted. This date can be manually edited by tapping on the field or auto-populated by enabling the **Set Inpatient Appointment Date to Dictation Date** option in the **Settings** tab. When enabled, the Appointment Date will automatically populate when the patient encounter is opened from the Patient List.

Please note the client configuration settings determine which fields are visible and editable.

Uploading Multiple Dictations for the Same Patient

Multiple dictations can be uploaded for the same patient without needing to add the patient to the list again. To do this, follow these steps:

1. From the Patient List, select the existing patient encounter.
2. Open the Record Screen Menu.
3. Select New Dictation.

This process starts a new dictation while retaining the same patient encounter information. Once the dictation is completed it can be uploaded. Only the last dictation can be played back from the mobile device.

Messages Tab

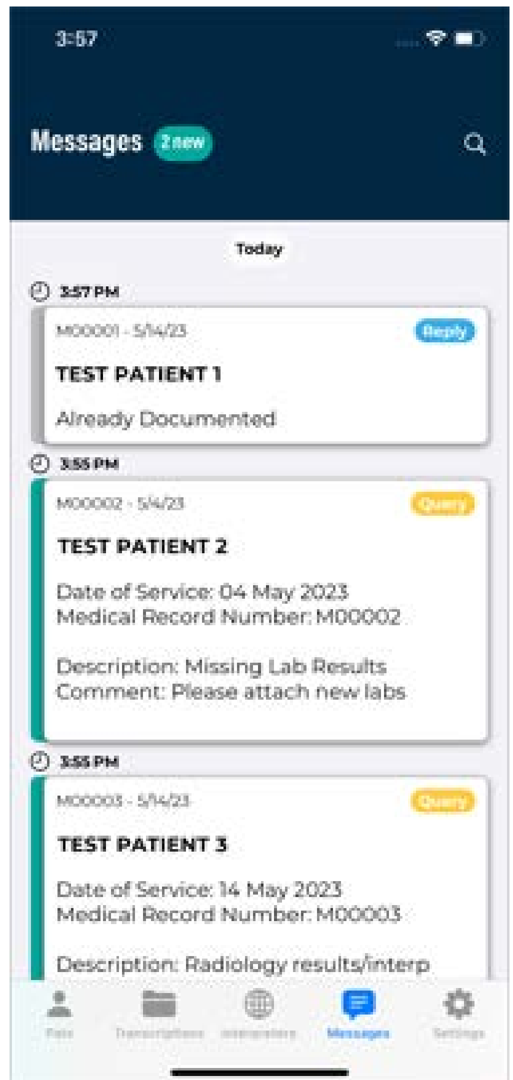
Clients who use DeliverHealth for medical coding can enable a Messages tab in the eSOne mobile app. This tab allows providers to receive messages from medical coders and send replies, shortening the turnaround time for coder queries and finalizing billing sooner.

The top of the Messages tab contains a count of message threads that have not been replied to. When the provider sends a reply to a message the message count will decrease. When a new message is received from a coder the message count will increase.

Tap the Search icon to filter messages by patient ID, patient name, or account number. The search is performed as characters are typed. Press the clear icon in the text box to clear the filter criteria, or the close icon to close the search box.

Worksheet List

Messages received for the same patient and account number are grouped together in one thread, referred to as a "worksheet". The worksheet list is grouped and sorted descending by the date of the last sent or received message, then sorted by the time the message was sent/received, then by full patient name.



Worksheets are color-coded in the worksheet list.

- **Teal** - The last message was an incoming message from a coder and has not been replied to.
- **Gray** - The last message was an outgoing reply to the coder.

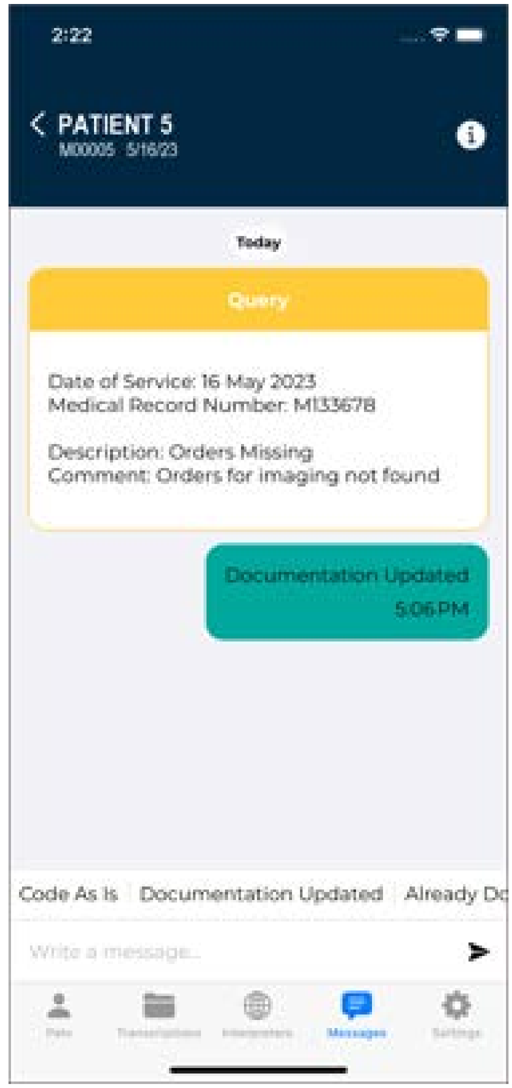
Worksheet Contents

Each worksheet in the list displays details about the patient, visit, and the type of message.

- **Patient MRN, Visit date, and Name:** The patient ID and visit/appointment date.
- **Message type:** The last incoming or outgoing message type; "Query" for an incoming message from a coder and "Reply" for an outgoing message to a coder.
- **Message text:** The contents of the last message received or sent.

Worksheet Message Thread

Tap on a worksheet to read all associated messages and find additional patient and visit information.



The patient name, MRN and visit date are displayed above the message thread. Tap the information icon ⓘ to view additional patient demographic information.

To return to the Worksheet List, tap the back arrow in the upper left corner.

Message Contents

Messages are grouped in ascending order by the date sent/received, then ordered ascending by time. The message thread will automatically scroll to the bottom to display the most recent message.

Each incoming and outgoing message is color-coded.

- **Yellow:** An incoming query from a coder.
- **Teal:** A reply from the provider to the coder.

If the coder has multiple queries, a new message will be sent for each query.

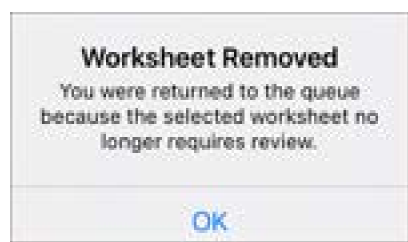
Replying to the Coder

Underneath the message thread are quick-reply options; scroll left and right to see all options. Tap a quick-reply to send the message to the coder. The quick-reply text cannot be edited and will be sent immediately.

Alternately, custom text can be typed. Tap the "Write a message..." text box to open the on-screen keyboard. Tap the Send button to send the message to the coder.

Once the coder's query has been resolved or the message has timed-out (duration determined by the client), the worksheet will no longer appear in the message list. It is important to reply promptly to ensure coding is completed efficiently.

If a worksheet message thread is open when the query is resolved or coding is completed, you will be returned to the worksheet list and a message will be given explaining the selected worksheet no longer needs review.



Reminder Messages

If the client is configured to send reminder messages, the coder query messages will be resent to the provider in configured intervals until the worksheet no longer requires review.

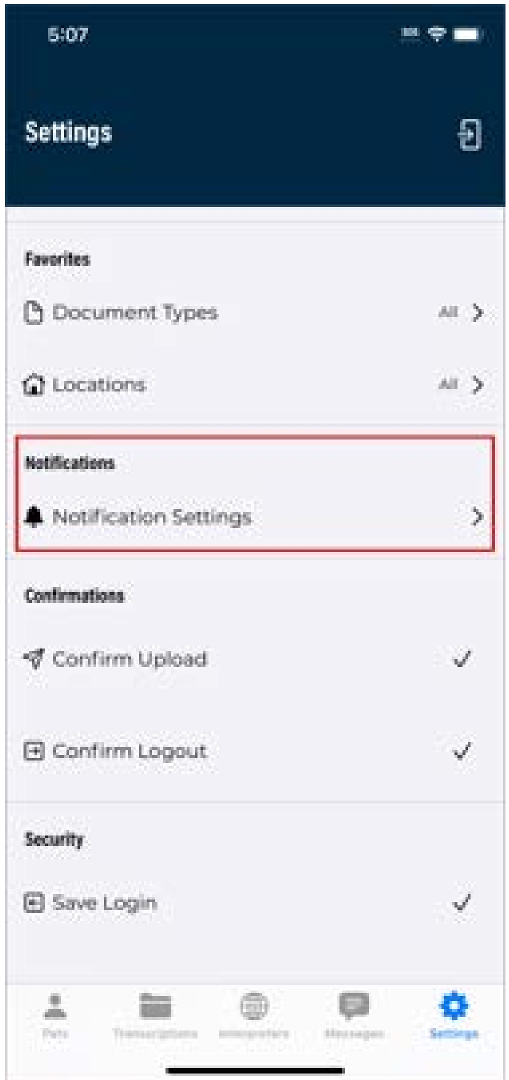
Notifications

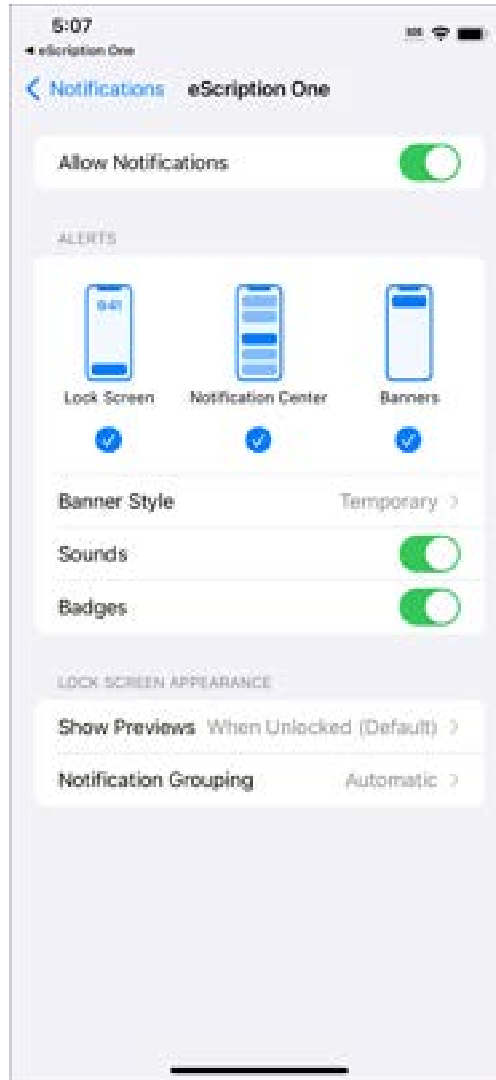
The eSOne mobile app can send notifications, alerting users when new messages are received from coders.

Note

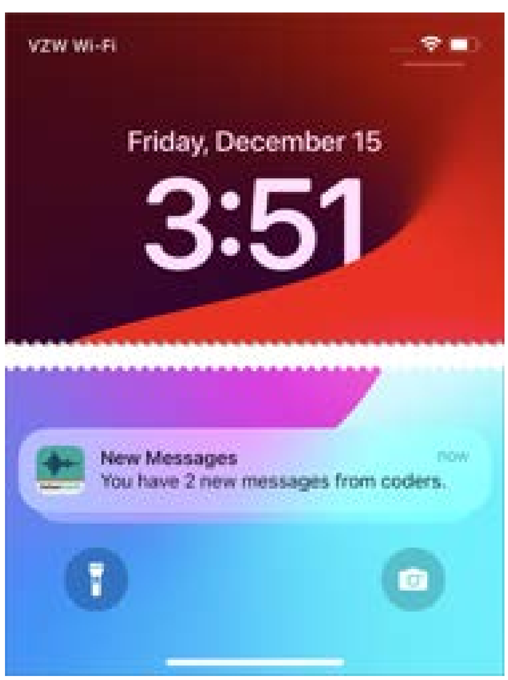
The user must have the esOne mobile app running and logged in to receive notifications.

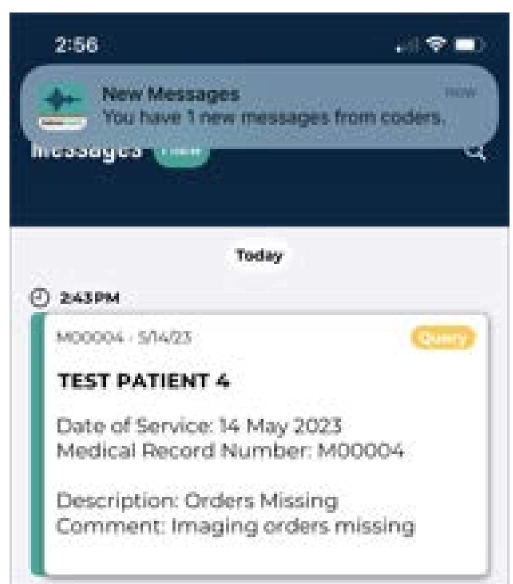
Tap on **Notification Settings** in the Settings tab to open the system app notifications settings for the eSOne mobile app. Each time a new message or reminder message is received the enabled notification(s) will apply.





Tap the notification to open the Messages tab. If you are not currently logged in to the eSOne mobile app, you will be prompted for login credentials.





Updating eSOne Mobile

To update eSOne Mobile to the newest version, open the Apple App Store application from your device, search for eSOne Mobile, tap the Update button, if available. If your app is up to date, a View button will appear. If you would like the application to auto-update, mark the check box to enable auto update start the Settings app, tap **App Store**, turn on App Updates.

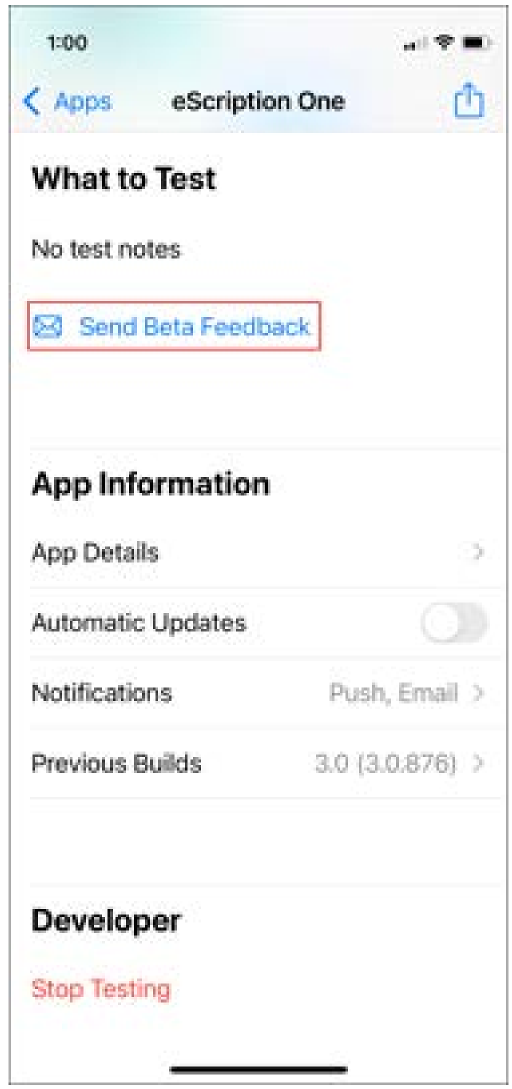
Beta Testing the eSOne Mobile App

If you are interested in receiving pre-released versions of the app, we encourage you to sign up for the beta testing program. This gives you the opportunity to preview upcoming releases and provide feedback.

Register for the beta testing program by emailing beta@deliverhealth.com. Request enrollment in the iOS eSOne Mobile beta testing program and provide the email address you would like enrollment instructions to be sent to. After eSOne has enrolled you, you will receive installation instructions from TestFlight.

As beta versions of the app become available you will be able to download them from the TestFlight app. You can submit feedback, including what you like/dislike about the app, new features you would like to see, usability comments, etc., by submitting feedback in the TestFlight app or emailing beta@deliverhealth.com.

Versions of the app released to beta testers are still in the development stages and may not fully represent the version to be released to the public. You can leave the beta testing program at any time. In the TestFlight app tap eSOne, scroll down to the bottom in the Developer section, then tap **Stop Testing**.



Removing eSOne Mobile

Remove eSOne Mobile the same way as any other application on your iOS device. From the Home Screen touch and hold the eSOne Mobile icon then tap **Remove App**.

FAQ

Q: My dictations are interrupted when I receive a phone call on my iPhone; how do I stop this from happening?
A: By design, Apple does not allow our application to block incoming phone calls while you are dictating. You will not lose any work if a phone call comes in while dictating. When the Accept/Message/Reject screen pops up, recording will pause. You will be returned to the record screen upon ending or rejecting the phone call. You can then resume dictating by pressing the Record button.

If you have concerns about incoming phone calls while dictating, you can switch your phone to 'Airplane Mode' or 'Do Not Disturb' and turn on Wi-Fi.

Q: How do I get a list of my appointments to show up on my device?
A: Your transcription company can do this manually, or we can set up an export from the software your facility uses for scheduling. ShadowLink, an eSOne application, can import information delivered to us by your facility into our system.

Q: My appointments are gone or are not appearing as they should.
A: There are two common causes of this problem. The most frequent is that the filter view has been changed. Please see Appointment Filters for filtering information. There could also be an issue with the way appointments have been uploaded to our system from your facility's scheduling software or EHR. Please call our Help Desk at 1-800-858-0080 to help resolve this issue.

Q: How is my data protected in the app?
A: All data that is stored on the device is protected by Apple's AES 256-bit crypto engine. Additionally, all the data that is transferred over the Internet is encrypted by a TLS connection, the same protection that banks use to give you safe and secure access to your accounts. Both mechanisms ensure that data-at-rest and data-in-motion are always secure when you use eSOne Mobile. The encryption keys are derived from the pass code that you set to lock your device, therefore using an alpha-numeric password is much more secure than a four-digit PIN.

Q: Why am I logged out every time I switch to a different app then return to the eSOne app?
A: For security reasons, the application will log you out when switching apps or minimizing the app. We do offer a feature that allows users to remain logged in during other mobile activity as long as the eSOne app is still running. The managing MTSO or client must enable this feature.

Q: How long is a dictation that I have put on hold and not uploaded kept on the device?
A: An On-hold dictation stays on the device until you complete it. There is no expiration on saved dictations. However, if the app is uninstalled from the device, any on-hold dictations will be permanently deleted.

Q: How long are the audio files saved on my device after I dictate and upload them?
A: eSOne Mobile keeps dictations for two weeks.

Q: My device stopped recording and is preventing me from making any more recordings. What is happening?
A: Your device does not have enough storage space to save the audio files. Remove files or programs from the device until there is enough memory to save additional dictations.

Q: I pressed the Record button but nothing is being recorded and the dictation playback buttons do not appear. Why?
A: The eSOne Mobile app must have permission to use the microphone. To ensure it is enabled, go to your device's Settings menu, then tap Apps. Find and tap on the eSOne Mobile application, then tap Permissions. Make sure permissions for all three settings (Microphone, Phone, and Storage) are enabled.

Q: What happens to my dictation if I lose my network and Wi-Fi connection while recording or uploading?
A: If the internet or network connection is lost while recording a dictation in eSOne Mobile, the recording continues without interruption, as it is stored locally on the device. However, if a phone call is received during recording, the dictation pauses until manually resumed. If the connection is lost while uploading a dictation, the upload pauses automatically. Once the network connection is restored, the upload resumes from where it left off, ensuring the dictation is successfully delivered without requiring a restart.