MedQuist™

The Learning Team

Designing DEP Templates

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User Guide with Instructor Notes

Instructor Guide

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How to Use This Manual

MedQuist instructional design is consistent with adult learning theory that stipulates experiential learning. Our instructional design is consistent with this idea in that it provides content delivery from an instructor and hands-on exercises that learners can complete with the instructor or independently.

Manuals contain:

- objectives and summaries at the module and topic level.
- content and exercises that improve job performance.
- practice exercises that enhance the transfer of knowledge, skills, and abilities from the classroom to the workplace.

Modules and Topics - Each manual consists of modules that group topics relating to specific tasks and skills. Each module lists objectives to provide specific goals for learning. Modules also supply a listing of prerequisite knowledge necessary for completing the topics covered in the module.

Performance and Application - Each module and some topics end with practice exercises designed to help you learn the material presented in the topics. The Performing Your Skills section allows you to practice skills, and the Applying Your Skills section asks you to apply your new knowledge by answering questions and solving problems. You can find the answers to the exercise on the pages following the exercises.

Manual Features

References - References to keyboard keys are presented in **bold** type. Key combinations are referred to in the following format: **Alt + A**. This means hold down the **Alt** key and press the **A** key at the same time. Menu names and commands also appear in **bold**.

Special text - Information that you type or enter is presented in *italics* or on a separate line in a `typewriter font`.

Prompts - Messages displayed by programs are surrounded with quotes and also appear in **bold**. For example, DOS displays the prompt: **"Insert the disk to format."**

Special symbols - The following symbols indicate important notes:

✍ This symbol points out a note of additional information.

☠ This symbol calls your attention to a very important note or warning.

🔔 This symbol indicates a tip or shortcut for a procedure you just learned.

Q This symbol indicates a note that is specific to MedQuist or a recommended setting for a field. Absence of this note indicates that the field setting is determined by client specifications or other requirements.

🕮 This symbol indicates a reference note.

Instructor Notes

Hardware Requirements

To work with the DocQmanage website and DocQscribe, each participant's machine must meet the following requirements:

- Pentium-class IBM-compatible PC, with at least 128 mb RAM, 56 kbps modem and 800 x 600 pixels SVGA display (256 colors minimum; 16-bit colors recommended)
- Internet access
- To use the Download Audio File option:
  - a Soundblaster (or compatible) sound card
  - Speakers or headphones
  - Supporting software
- To use foot controls:
  - 9-pin serial COM port (a second COM port will be required if you are using an external modem)
  - USB foot pedal

There is no need to install DocQmanage application software or reserve any PC disk space. You can access DocQmanage functions through the Web browser interface.

Software Requirements

To work with the DocQmanage website and DocQscribe, workstations used in this course must meet the following minimum software requirements:

- Windows 2000 or higher
- Word 2000 or higher

- DocQmanage
- DocQscribe
- Adobe Acrobat Reader
- Microsoft Internet Explorer 5.0 or later

Classroom Setup

Prior to class:

- In DocQmanage, add a template for each student. This allows each participant to download, upload, and test their own template.
- Download the Designing DEP Templates course files from QNet and copy the **Practice** folder to the student workstations.

About This Course

Course Description

This course covers designing templates for use with DEP. Participants learn how to read extensible markup language (XML) and create templates using Microsoft Word. This course also covers working with templates and using the template library.

Course Purpose

The purpose of this course is to provide a thorough understanding of DEP templates and their use.

Course Audience

This course is intended for DEP Template Developers, DEP System Administrators, and DEP end users.

Course Prerequisites

Prior to taking this course, participants must have a working knowledge of the following:

- Microsoft Word
- DEP

Course Objectives

After completing this course, you will be able to:

- use template tools and manage barcode fields.
- create DEP templates.
- work with templates.
- read XML files and troubleshoot templates.

Review module description and performance objectives.

Module 1:
Using Template Tools and Managing Barcode Fields

Module Description

This module covers how you can use template tools to assist you in creating DEP templates. The topics in this module provide instructions for installing the DictationNet Template Assistant and DEPBarcodes templates, checking the template syntax, and inserting and editing and barcode fields.

Module Performance Objectives

In this module, you will learn how to:

- install the DictationNet Template Assistant and DEPBarcodes templates.
- check template syntax.
- insert and edit barcode fields.

Module Prerequisites

To understand the concepts and perform the tasks in this module, you should know how to:

- use Windows with basic to intermediate skills.
- use Microsoft Word with basic to intermediate skills.

Topic:

Installing the DictationNet Template Assistant and DEPBarcodes Template

The DictationNet Template Assistant automatically verifies the correct syntax for DEP templates. This tool automates the task and provides a quick check of the template syntax.

- Before uploading a template for use, you must always check the template syntax.

Demonstrate installing the templates and have the participants follow along and install the files on their workstations.

Both templates are in the Practice folder.

The DEPBarcodes template adds a DEPBarcodes menu to Word that allows you to manage barcode fields. You can use the Barcodes command on the DEPBarcodes menu to insert, edit, delete, and copy barcode fields in document templates.

To install the DictationNet Template Assistant, you must add the document template file to your C:\Documents and Settings \[username]\Application Data\Microsoft\Word\STARTUP folder. If you are using Windows NT, save the file to the following directory: C:\Program Files\Microsoft Office\Office\Startup.

- In order to have the DictationNet Template Assistant available each time you start Word, you must save the DictationNet Template Assistant to the Startup folder for Microsoft Word.

After you install the DictationNet Template Assistant and DEPBarcodes templates, the Menu bar displays the DictationNet and DEPBarcodes menus:

🔔 As with the other menus, such as File, Edit, View, etc., the shortcut key is underlined. For example, you can view the DictationNet menu by pressing the **Alt, D**, and **Enter** keys separately in order.

☠ Although the DictationNet menu displays commands that allow you to insert values, titles, and presets, it is not advisable to use these commands.

Demonstrate the keystrokes for using the hot keys.

Mention that it is not advisable to use the other commands on the DictationNet menu.

Demonstrate locating the Word Startup folder.

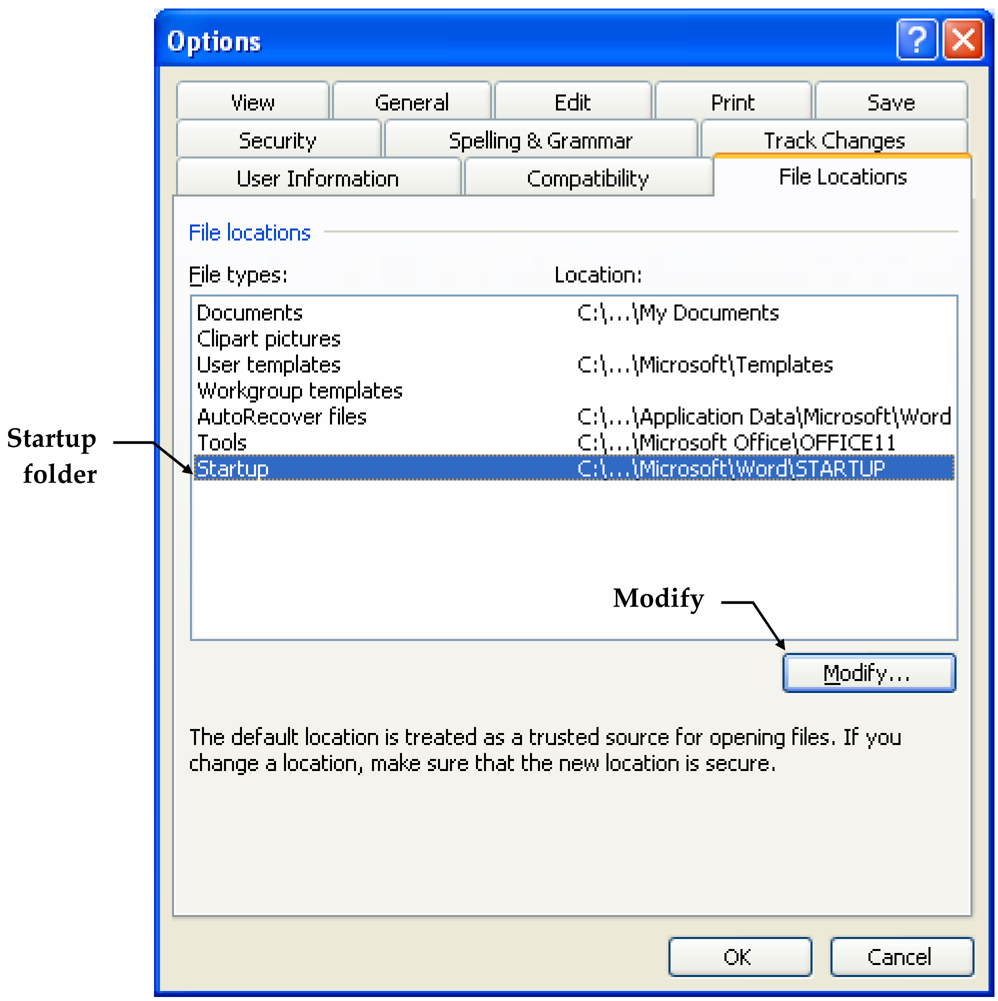
Locating the Word Startup Folder

If you are unsure of the location of the Word Startup folder, you can locate it by viewing the file location settings in Word.

To determine the location of the Startup folder, follow the steps below:

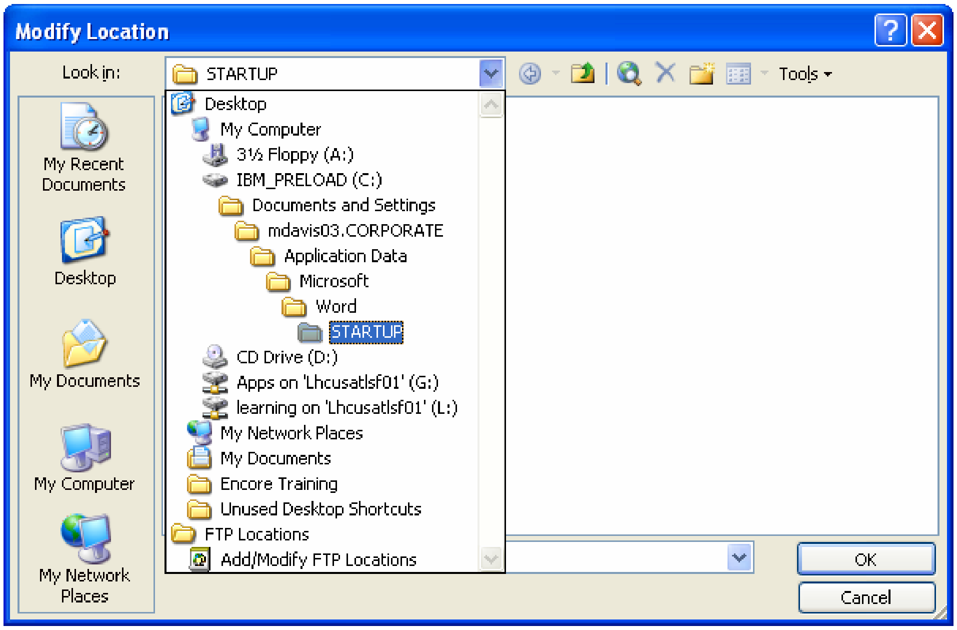
1. Start Word.

2. Click **Tools > Options**. The Options dialog box displays:



3. Click the **File Locations** tab.

4. Select **Startup** in the **File types** list and click **Modify**. The Modify Location dialog box displays:



5. Click the **Look in** drop-down list box and verify the path to the Startup folder.

6. Click **Cancel**. The Modify Location dialog box closes and returns to the Options dialog box.

7. Click **Close**. The Options dialog box closes.

Adding the DEPBarcodes Template to the Current Document

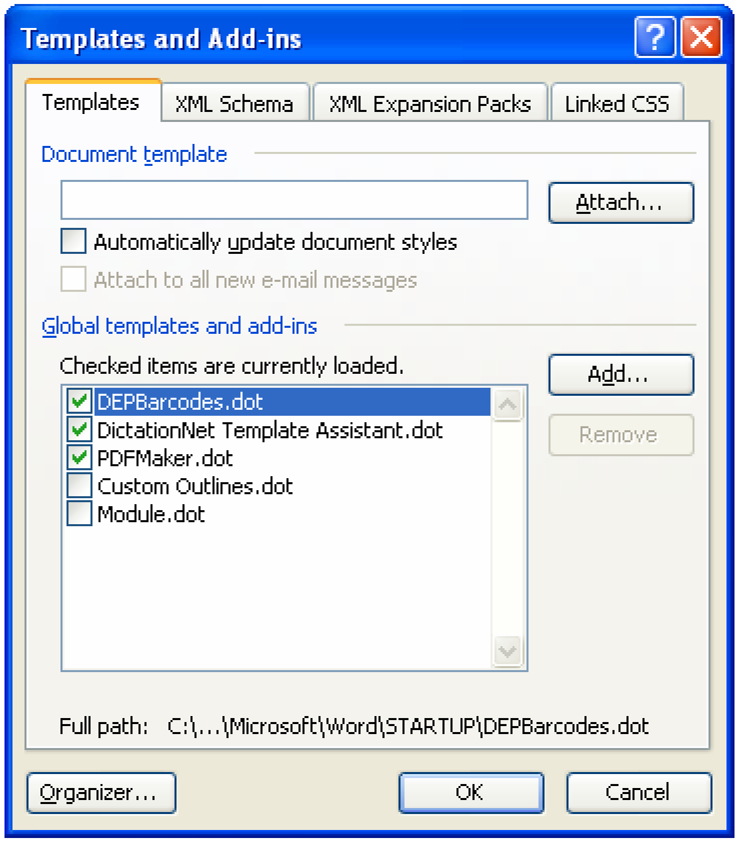
Demonstrate how to add templates to a single document.

If the DEPBarcodes menu is unavailable at Word startup, you can still use the template's tools and macros by adding the template to the current document.

To add the templates to the document, follow the steps below:

1. Start a new document in Word.

2. Click **Tools > Templates and Add-ins**. The Templates and Add-ins dialog box displays:



3. Verify that the DEPBarcodes.dot displays in the **Global templates and add-ins** list box and select the check box.

If the **Global templates and add-ins** list does not display the template, click **Add** and navigate to the location of the templates, select the template files, and click **OK**.

4. Click **OK**. The DEPBarcodes template is added to the document.

Topic Summary

Review the topic summary.

- Before uploading a template for use, you must always check the template syntax.

- To install the DictationNet Template Assistant, you must add the document template file to your C:\Documents and Settings\[username]\Application Data\Microsoft\Word\STARTUP folder.

- To determine the location of the Startup folder, start Word, click **Tools > Options**, and click the **File Locations** tab.

- To add the templates to a document, click **Tools > Templates and Add-ins**.

Open the **Syntax** file and check the syntax. Have the participants follow the same steps.

Topic:
Checking Template Syntax

After installing the DictationNet Template Assistant, you can use the check template syntax command to verify correct template syntax. It is also very efficient in finding common missing items, such as a missing opening or closing caret (<), a slash, or a text tag.

To check template syntax, follow the steps below:

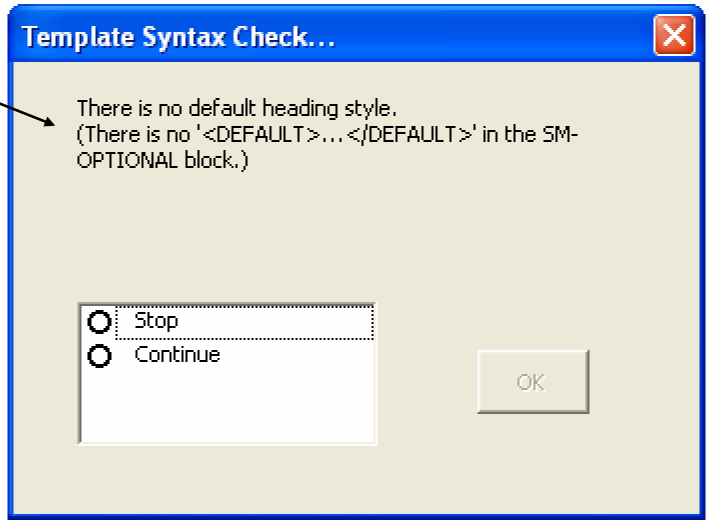
1. From the template that you want check, click **DictationNet > Check Template Syntax**.

   If the syntax is correct, the dialog box displays:

2. Click **OK**. The syntax check is complete.

If the syntax requires correction, a dialog box similar to the following displays:

Syntax error



The top portion of the dialog box displays a description of the syntax error. The bottom portion of the dialog box displays a list box that contains options that allow you to stop the syntax check and correct the error or continue the syntax check.

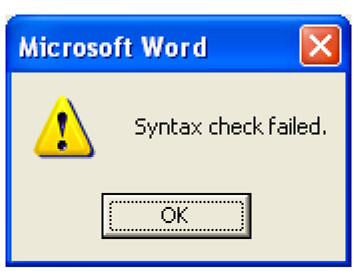
3. Do one of the following:

   ⇒ Click **Stop** to stop the syntax check and correct the file.

   ⇒ Click **Continue** to continue the syntax check.

4. Click **OK**. The syntax check continues or stops.

If the syntax check fails, the following dialog box displays:



You can continue checking the template syntax and correcting errors until the syntax is correct.

Review the topic summary.

Topic Summary

- You can use the check template syntax command to verify correct template syntax and find common missing items.

- To check template syntax, click **DictationNet > Check Template Syntax**.

Topic:

Inserting and Editing Barcode Fields

After installing the DEPBarcodes template, you can use the template tools to manage barcode fields. You can insert, edit, and copy barcode fields.

✍ To enable barcode printing in RDP, the Distribution Specialist or RDP Administrator must select the Print Barcodes check box in the Print Matrix for the print definition.

Configuring Barcodes

When configuring barcodes, insert each barcode in a conditional statement as follows:

- "Expression 1"—the barcode data.
- "Expression 2"—this value is "1" for "true", or to "0" for false.
- "True Value"—the barcode data such as <MH7MedicalRecordNumber/> or <HL7BillingNumber/> should be entered within quotes.
    - If more than one field is needed, place all data or XML tags between the quotes. Insert commas, spaces, etc., between the data fields as required. Leading or trailing spaces will be removed when the barcode is inserted.
    - Sometimes a client may request a return (ENTER) or tab space to follow the barcode data. This can be inserted between curly brackets after the barcode data. For example, a tab space is required after the MRN is written as "<HL7MedicalRecordNumber/>{TAB}".

Write a barcode expression on flip chart or white board and explain the parts of the expression.

- "False Value"—this should always be quotation marks (") as opposed to single quotation marks ('). No space is needed between them. For example:
  - {IF "SMBarcode417_020" = "1" "<HL7 Medical Record Number/>" ""}
  - {IF "Expression1" = "Expression2" "TrueValue" "FalseValue"}

Configuring Barcode Data

The barcode data ("Expression1") must be a minimum of 10 characters and a maximum of 16 characters. The first 9 characters are equal to "SMBarcode".

Barcode syntax is as follows:

"SMBarcode" + Symbology character (0-7) + Display Text Under Barcode (0=False,1=True) + Font Weight (0-9) + Wide-to-Narrow Bar Ratio (0-9 or _) + Narrow Bar Width (001-250)

For example, "SMBarcode016_020", symbology = 0, display text = 1 (on), display text font weight = 6, wide-to-narrow bar ratio = 3:1, narrow bar width = 0.020".

Every setting following the symbology is optional and set to the default values indicated, if not specified.

The following table describes supported Symbology settings (10th character):

Setting	Description
0	Barcode 128 (auto select)
1	Barcode 128A

Setting	Description
2	Barcode 128B
3	Barcode 128C
4	Barcode 3 of 9 or 39
5	Barcode 3 of 9 Extended
6	Barcode Interleaved 2 of 5
7	Barcode Rational Codebar

The following table describes optional Display Text Under Barcode (11th character - optional) settings:

Setting	Description
0	False
1	True ‘1’ (True) is the default setting.

The following table describes optional Font Weights (12th character - optional) settings:

Setting	Description
0	DEFAULT
1	THIN
2	EXTRALIGHT
3	LIGHT

Setting	Description
4	NORMAL
5	MEDIUM
6	SEMIBOLD ‘6’ (SEMIBOLD) is the default setting.
7	BOLD
8	EXTRABOLD
9	HEAVY

The following table describes optional Wide-to-Narrow Bar Ratio (13th character - optional) settings:

Setting	Description
0	2.0:1
1	2.1:1
2	2.2:1
3	2.3:1
4	2.4:1
5	2.5:1
6	2.6:1
7	2.7:1
8	2.8:1

Setting	Description
9	2.9:1
blank	3.0:1 ‘blank’ (3:0:1) is the default setting.

The following table describes optional Narrow Bar Width in 1000ths of an inch (14th to 16th characters - optional) settings:

Setting	Description
Valid range	001–250 (0.001" - 0.250")
Default value	020 (0.020")

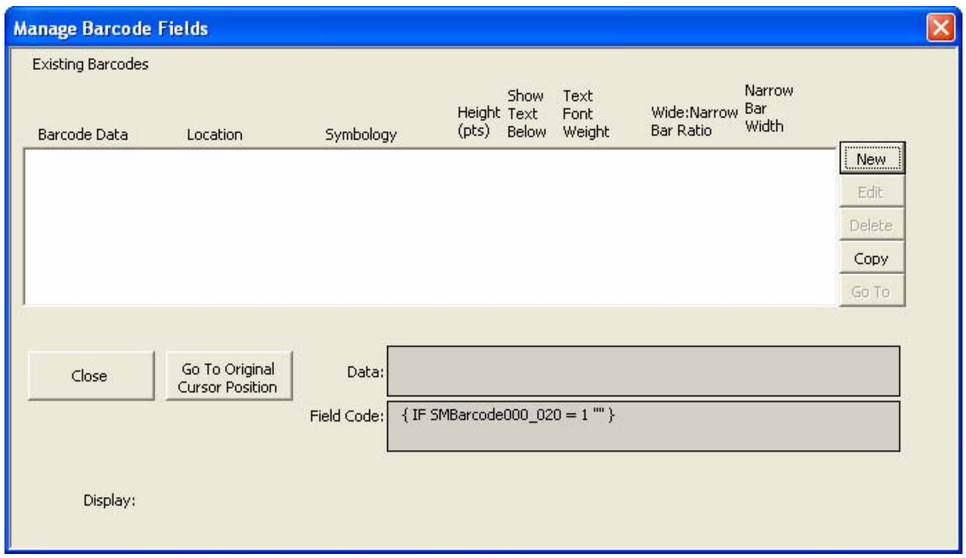
Insert a sample barcode in a blank document or template.

Inserting Barcode Fields

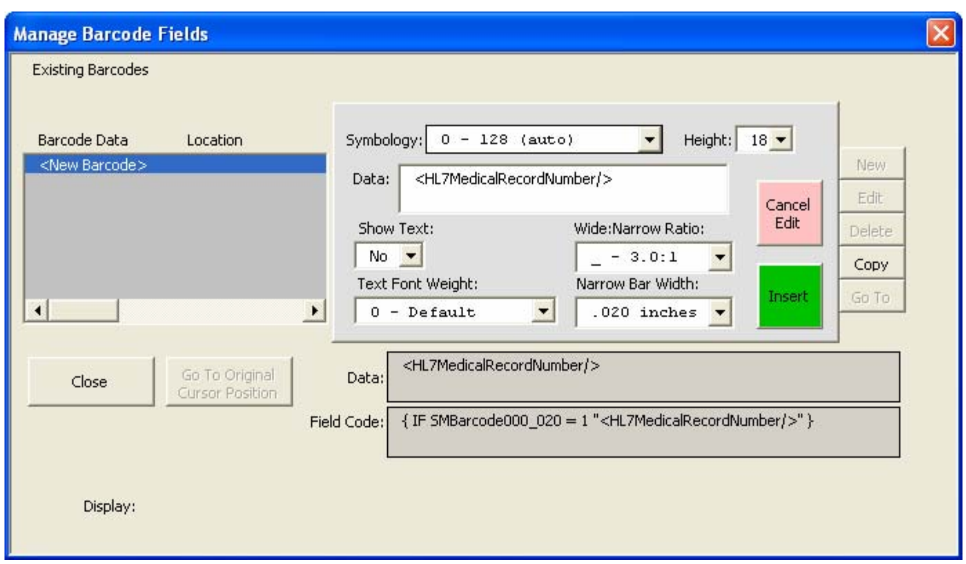
To insert a barcode field, follow the steps below:

1. Click in the template where you want to insert a barcode field.

2. Click **DEPBarcodes > Barcodes**. The Manage Barcode Fields dialog box displays:



3. Click **New**. The following dialog box displays:

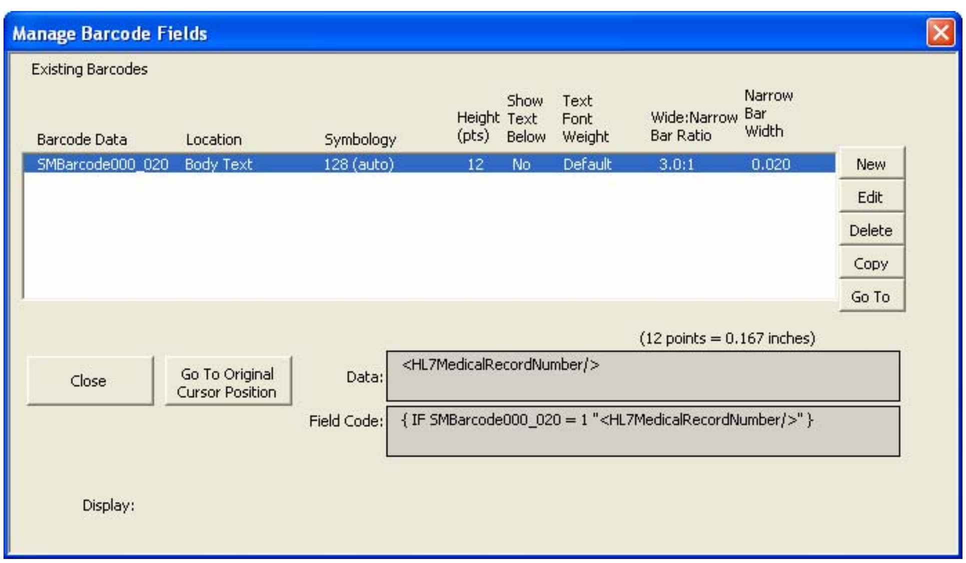


4. Enter the barcode **Data** in the text box.

5. Enter the other barcode properties:

Property	Description
Symbology	Enter the symbology.
Height	Enter the text font height.
Show Text	Select whether or not to display text under the barcode.
Wide:Narrow Ratio	Select the ratio of the size of the wide bar to the size of the narrow bar.
Text Font Weight	Enter the text font width.
Narrow Bar Width	Select the narrow bar width.

6. Click **Insert**. The Manage Barcode Fields dialog box displays the barcode:



To insert another barcode, repeat steps 3–6.

7. When you finish, click **Close**. The template displays the barcode field.

Demonstrate changing the font size in the barcode you inserted in the previous document. Have the participants follow the same procedure.

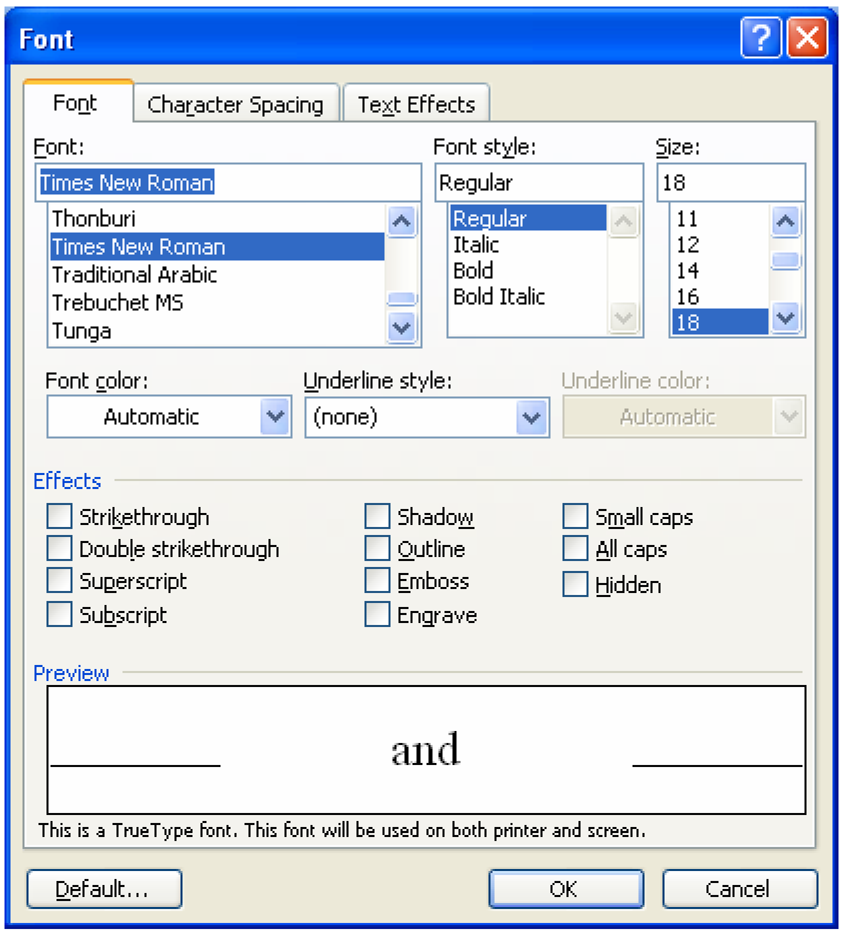
Selecting Font Size

After inserting the barcode in the template, you can select the font size of the barcode field and text.

To select the font size of a barcode, follow the steps below:

1. Select the entire IF field of the barcode.

2. Click **Format > Font**. The Font dialog box displays:



🔔 You can also enter the **Font Size** in the combo box on the Formatting toolbar.

3. Click the **Font** name in the list box.

4. Click the font **Size** in the list box.

✐ The barcode height in inches is based on the font size, (font point size) / 72. For example, 18 pt. / 72 = 0.25".

✐ The minimum legal barcode height is 0.25" so the font should be 18 point or larger. Optionally, the barcode text will be included under the barcode. The barcode text uses the same font name as the barcode and the font point size 14 points for up to 28 point size barcode or 16 points if the barcode is larger than 28 point.

5. Click **OK**. The font size of the barcode field changes to the selected value.

Editing Barcode Fields

Demonstrate editing the barcode you inserted in the previous document. Have the participants follow the same procedure.

After you create and insert a barcode field, you can edit the barcode field.

To edit a barcode field, follow the steps below:

1. Open the template that contains the barcode field that you want to edit.

2. Click **DEPBarcodes > Barcodes**. The Manage Barcode Fields dialog box displays.

3. Select the **Existing Barcode** that you want to edit and click **Edit**.

4. Edit the barcode properties and click **Save**. The Manage Barcode Fields dialog box displays the changes.

5. When you finish, click **Close**. The template displays the edited barcode field.

Copying Barcode Fields

Demonstrate copying the barcode you inserted in the previous document. Have the participants follow the same procedure.

You can also copy barcodes to other positions in the template. Copying barcode fields is helpful for templates that require the same barcode to display in the various points.

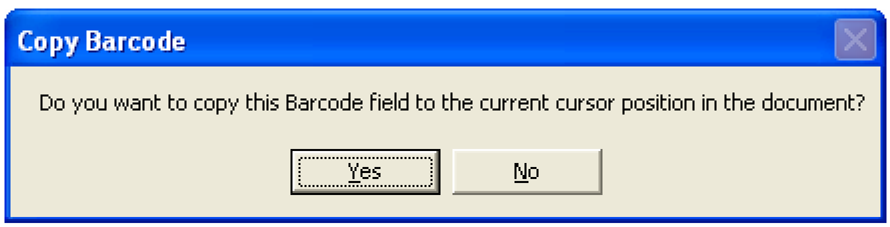
To copy a barcode field, follow the steps below:

1. Open the template that contains the barcode field that you want to copy.

2. Click in the template where you want to copy a barcode field.

3. Click **DEPBarcodes > Barcodes**. The Manage Barcode Fields dialog box displays.

4. Select the **Existing Barcode** that you want to copy and click **Copy**. The Copy Barcode dialog box displays:



5. Do one of the following:

   ⇒ Click **Yes** to copy the barcode field to the current position in the document.

   ⇒ Click **No** to close the Copy Barcode dialog box and place the cursor where you want to copy the barcode fields.

✍ If you click **No**, you must close the Manage Barcode Fields dialog box and repeat steps 2–4.

6. When you finish, click **Close**. The template displays the copied barcode field.

Deleting Barcode Fields

Demonstrate deleting the barcode. You can delete the barcode you inserted or you can demonstrate the procedure and click **No**.

You can delete barcode fields by using the Manage Barcode Fields dialog box or deleting them from the template document.

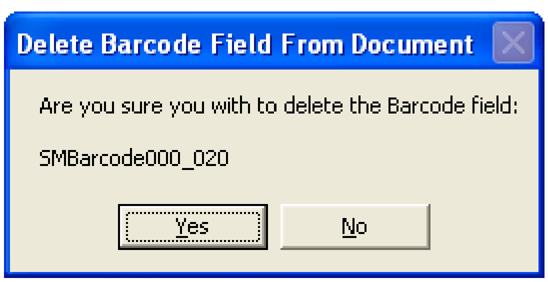
To delete a barcode field from an open template, select the barcode field that you want to delete and press **Delete**.

To delete a barcode field using the Manage Barcode Fields dialog box, follow the steps below:

1. Open the document that contains the barcode field that you want to delete.

2. Click **DEPBarcodes > Barcodes**. The Manage Barcode Fields dialog box displays.

3. Select the **Existing Barcode** that you want to delete and click **Delete**. The Delete Barcode Field From Document dialog box displays:



4. Click **Yes**. The system deletes the barcode field from the document.

Review the topic summary.

Topic Summary

- After installing the DEPBarcodes template, you can use the template tools to manage barcode fields. You can insert, edit, and copy barcode fields.

- To insert a barcode field, click in the template where you want to insert a barcode field, click **DEPBarcodes > Barcodes**, and click **New**.

- To edit a barcode field, click **DEPBarcodes > Barcodes**, select the **Existing Barcode** that you want to edit, and click **Edit**.

- To copy a barcode field, click **DEPBarcodes > Barcodes**, select the **Existing Barcode** that you want to copy, and click **Copy**.

- To delete a barcode field, click **DEPBarcodes > Barcodes**, select the **Existing Barcode** that you want to delete, and click **Delete**.

Module Summary

Review module summary.

- Before uploading a template for use, you must always check the template syntax.
- To install the DictationNet Template Assistant, you must add the document template file to your C:\Documents and Settings\[username]\Application Data\Microsoft\Word\STARTUP folder.
- To determine the location of the Startup folder, start Word, click **Tools > Options**, and click the **File Locations** tab.
- To add the templates to a document, click **Tools > Templates and Add-ins**. You can use the check template syntax command to verify correct template syntax and find common missing items.
- To check template syntax, click **DictationNet > Check Template Syntax**.
- After installing the DEPBarcodes template, you can use the template tools to manage barcode fields. You can insert, edit, and copy barcode fields.
- To insert a barcode field, click in the template where you want to insert a barcode field, click **DEPBarcodes > Barcodes**, and click **New**.
- To edit a barcode field, click **DEPBarcodes > Barcodes**, select the **Existing Barcode** that you want to edit, and click **Edit**.
- To copy a barcode field, click **DEPBarcodes > Barcodes**, select the **Existing Barcode** that you want to copy, and click **Copy**.
- To delete a barcode field, click **DEPBarcodes > Barcodes**, select the **Existing Barcode** that you want to delete, and click **Delete**.

Give participants about 10–15 min. to complete these exercises and review the answers.

Performance and Application

Performing Your Skills

To perform the skills introduced in this module, complete the following exercises:

1. Open the **Check Template Syntax Sample** file and check the template syntax (Page 12).

If the syntax check identifies an error, continue the syntax check.

2. Open a blank document and insert a barcode with the following values: SMBarcode016_020 (Page 20).

3. Edit the barcode you created in the previous item so the narrow bar width is 0.22 (Page 23).

4. Copy the barcode you edited in the previous item to another point in the blank document (Page 24).

5. Using the Manage Barcode Fields dialog box, delete the barcode that you copied in the previous item (Page 25).

Applying Your Skills

To apply the skills covered in this module at a higher level, complete the following exercises:

1. Open the **Check Template Syntax Sample** file and check the template syntax again. If the syntax check failed, how can you correct the file?

Performance and Application Answers

Performing Your Skills Answers

1. Open the **Check Template Syntax Sample**.
   Click **DictationNet > Check Template Syntax**.
   Click **Continue**.
   Click **OK**.
   Click **Continue**.
   Click **OK**.
   Click **OK**.

2. Click in the document where you want to insert the barcode.
   Click **DEPBarcodes > Barcodes**.
   Click **New**.
   Click **Yes** in the **Show Text** drop-down list box.
   Click **6 – Semi-Bold** in the **Text Font Weight** drop-down list box.
   Click **Insert**.
   Click **Close**.

3. Click **DEPBarcodes > Barcodes**.
   Select the barcode you created and click **Edit**.
   Click **0.22 inches** in the **Narrow Bar Width** drop-down list box.
   Click **Save**.
   Click **Close**.

4. Click **DEPBarcodes > Barcodes**.
   Select the barcode you edited and click **Copy**.
   Click **Yes**.
   Click **Close**.

5. Click **DEPBarcodes > Barcodes**.
   Select the barcode you copied and click **Delete**.
   Click **Yes**.
   Click **Close**.

Open and review the answer file.

Applying Your Skills Answers

1. The syntax check failed because a closing tag is missing. To correct this file, add a closing tag for the Allergies heading.

📖 See the **Check Syntax Sample Template-Answer** file for the answer.

Module 2:
Creating DEP Templates

Review module description and performance objectives.

Module Description

This module covers creating DEP templates using Microsoft Word. The topics in this module provide instructions about defining page setup, formatting default style, creating headers and footers, and creating the template body. Other topics cover formatting page numbers and dates. The closing topics in the module detail creating letter templates, signature blocks, and courtesy copies.

Module Performance Objectives

After completing this module, you will be able to:

- design page setup and format the default font.
- create headers and footers.
- create the template body.
- insert and format page numbers.
- insert and format dates.
- create letter templates.
- create signature block information.
- create courtesy copies.

Module Prerequisites

To understand the concepts and perform the tasks in this module, you should know how to:

- use Windows with basic to intermediate skills.
- use Microsoft Word with basic to intermediate skills.

Transition: In the previous module, we configured Word to help create templates. Now we are ready to start creating templates.

Topic:
Designing Page Setup

The client requirements for the template determine the page setup. You can use Word to set page margins, header and footer margins, and the default font.

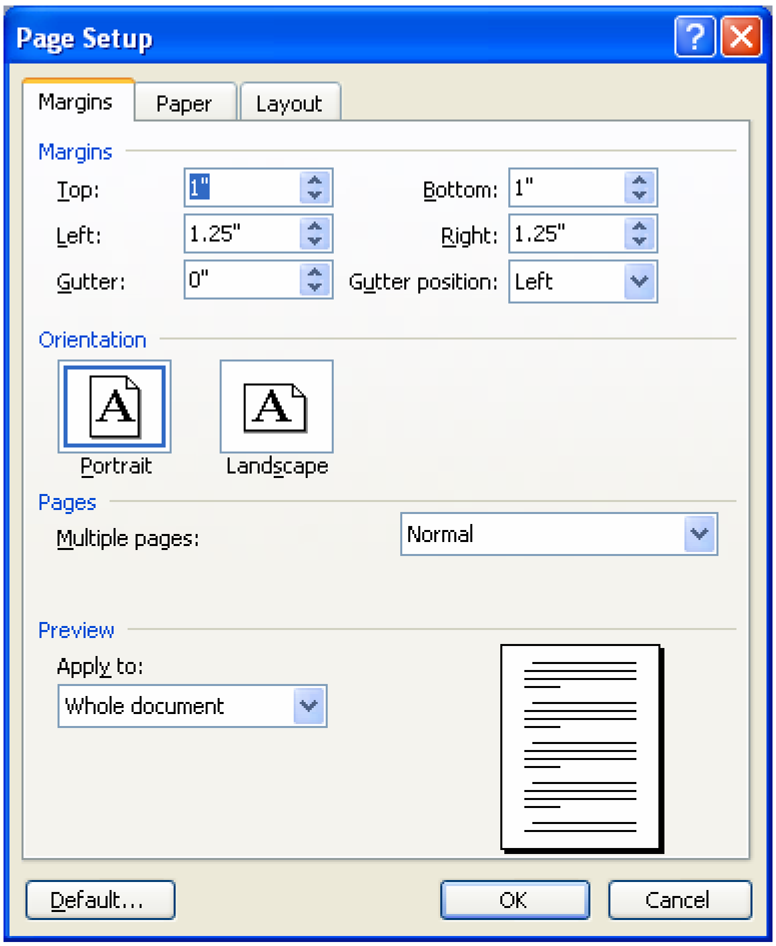
✐ The default unit of measure displays in inches. If the template requirements use centimeters, you can type *cm* after a margin value and Word converts the measurement to inches.

Setting Page Margins

Demonstrate setting page margins.

To set page margins and header footer margins, follow the steps below:

1. Click **File > Page Setup**. The Page Setup dialog box displays:



You can also double-click the blank space on either side of the ruler to display the Page Setup dialog box.

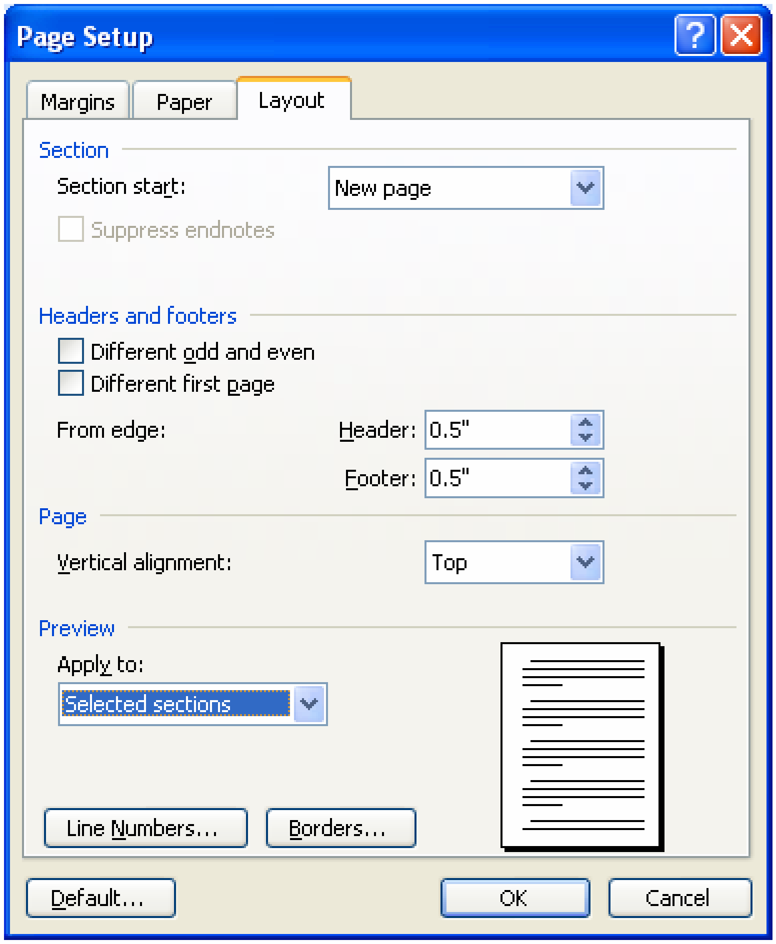
You can also click the **Up Arrow** or **Down Arrow** to increase or decrease the value in the spin box.

If the Margins tab does not display by default, click the **Margins** tab.

2. Enter margins in the following spin boxes:

Margin	Description
Top	Enter amount of space between the top of the page and the first line.
Bottom	Enter the amount of space between the bottom of the page and the last line.
Left	Enter the amount of space between the left edge of the page and the left end of text.
Right	Enter the amount of space between the right edge of the page and the right end of text.

3. When you finish setting page margins, click the **Layout** tab. The Layout tab displays:



4. Enter the margins in the following spin boxes:

Margin	Description
Header	Enter amount of space between the top of the page and the header.
Footer	Enter the amount of space between the bottom of the page and the footer.

You can also click the **Up Arrow** or **Down Arrow** to increase or decrease the value in the spin box.

- If the header or footer on the first page is different from the header or footer on subsequent pages, select the **Different first page** check box.

- If you select the **Different first page** check box after creating a header or footer, the header or footer on the first page displays on the second page.

- If your document is a single page, Word hides the header/footer because it displays on the second page that you have yet to create. To view the header/footer, insert a page break by pressing **Ctrl + Enter** and the header/footer information displays on the second page.

5. Click **OK**. Word applies your changes to the margins.

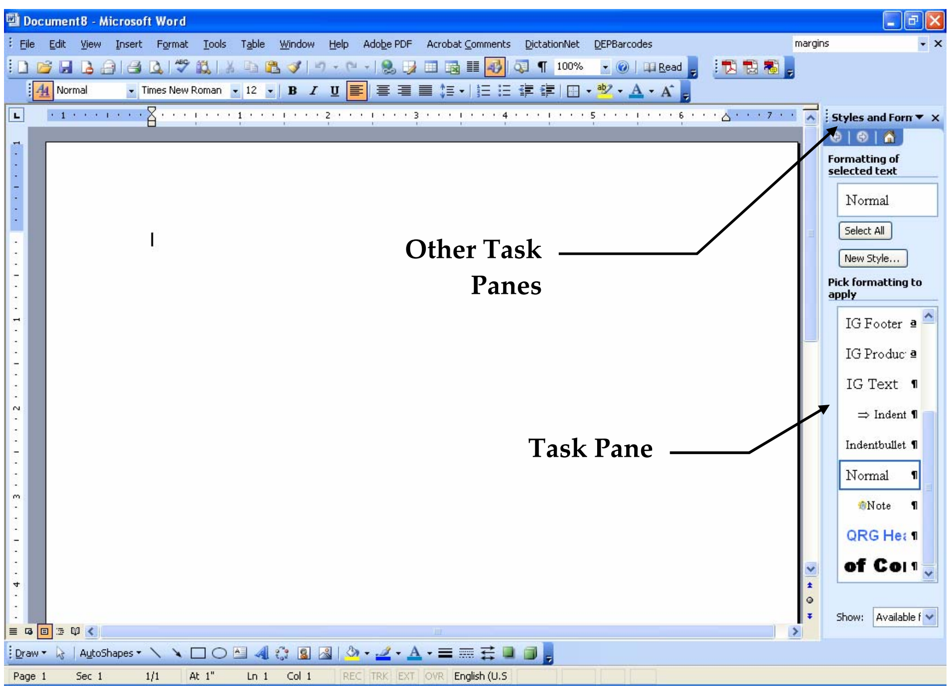
Setting the Default Font

The default font in Microsoft Word is 12-pt Times New Roman. If the default font for your template is not 12-pt Times New Roman, you can set the default font by changing the font of the Normal paragraph style.

You can demonstrate setting the default font, but you can cancel at the end to leave it unchanged.

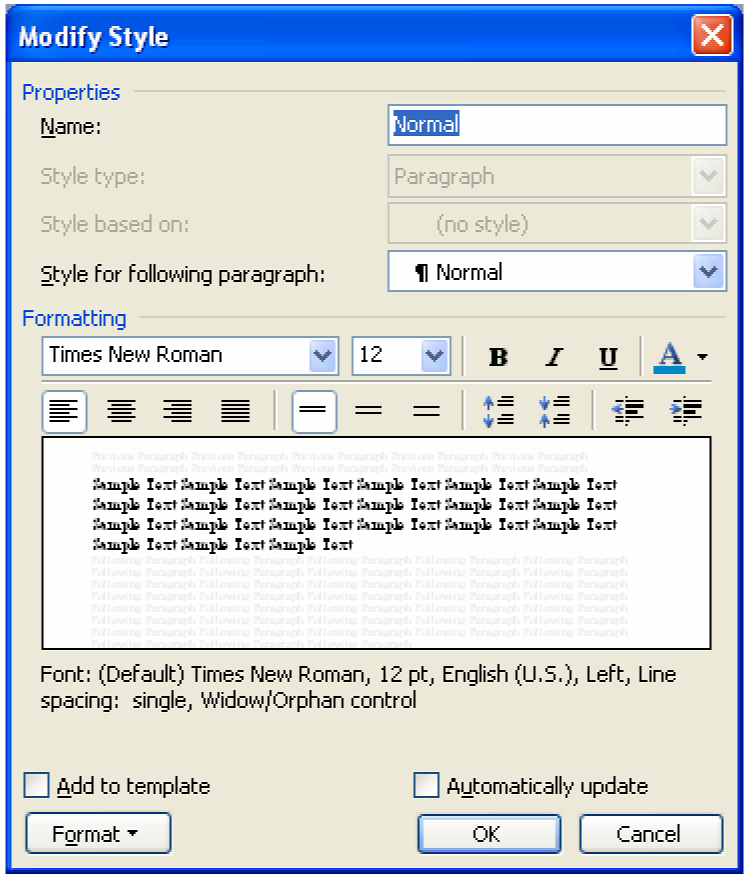
To set the default font, follow the steps below:

1. Click **Format > Styles and Formatting**. The Styles and Formatting task pane displays:



If can view the Task Pane, you can view the Styles and Formatting task pane by clicking **Styles and Formatting** in the **Other Task Panes** drop-down list box.

2. Right-click **Normal** in the task pane and click **Modify**. The Modify Style dialog box displays:



3. Click the default font that you want in the **Formatting** drop-down list box.

4. Click **OK**. Word sets the default font.

Topic Summary

Review the topic summary.

- The client requirements for the template determine the page setup.
- To set page margins and header footer margins, click **File > Page Setup**.
- To set the default font, click **Format > Styles and Formatting**, right-click the **Normal** style name and click **Modify**.

Topic:
Creating Headers and Footers

Before creating headers and footers, review the requirements to determine if the document has the same headers and footers on all pages. If they are not the same, see the *Setting Page Margins* section.

Using Tables

If not all the items in the header are aligned at the left margin, you can insert a table in the header. Inserting a table in the header allows you to ensure consistency in formatting different text items on the same line.

For example, the graphic below displays a header that contains a table:

Open the **Header Sample.rtf** file.

Header

	AMERICAN RECOVERY CENTER
	2180 W. VALLEY BLVD.
	POMONA, CA 91768
PATIENT: <HL7FULLNAME:C/>	
CHART NUMBER: <HL7PATIENTID/>	DISCHARGE SUMMARY
	Admission Date: <HL7ADMITDATE/>
PHYSICIAN: <USERSIGNAME:C/>	Discharge Date: <HL7DISCHARGEDATE/>
	POMONA, CA 91768

Mention that you will insert a table in the header then select which gridlines to print.

When this document prints, the only lines that display are the vertical line in the center and the horizontal line at the bottom of the table.

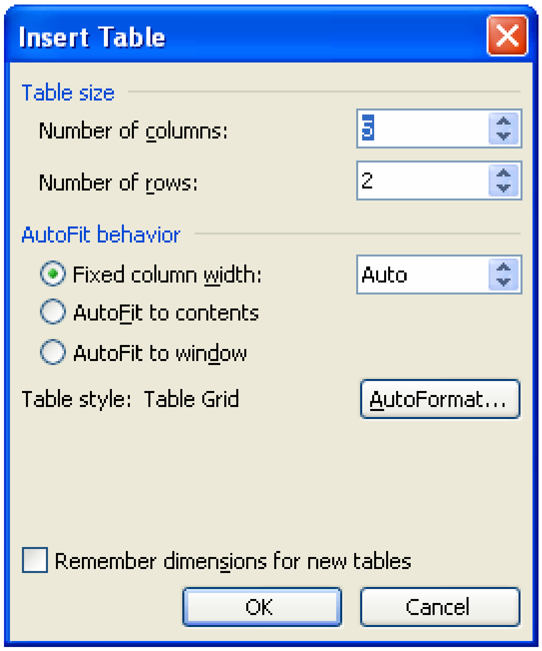
📖 For more information about selecting tables for printing, see the *Printing Table Gridlines* section in this topic.

To insert a table in a header, follow the steps below:

1. Click **View > Header and Footer**. The Header and Footer view displays.

2. Click in the header where you want to place the table.

3. Click **Table > Insert > Table**. The Insert Table dialog box displays:



You can also click **Insert Table** on the Standard toolbar.

4. Enter the **Number of columns** in the spin box.

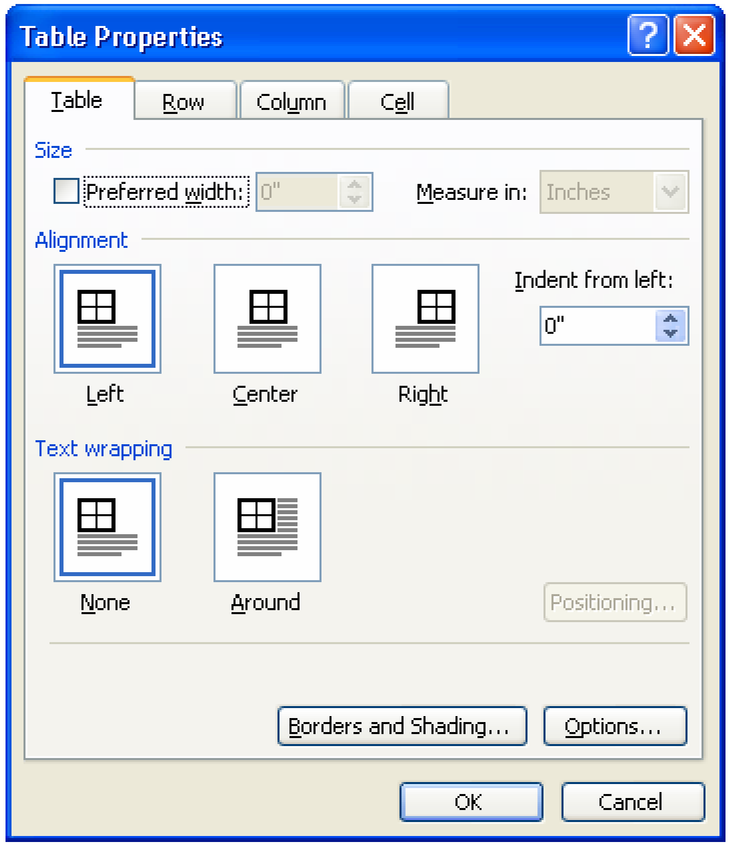
You can also click the **Up Arrow** or **Down Arrow** to increase or decrease the value in the spin box.

5. Enter the **Number of rows** in the spin box.

6. Click **OK**. The table displays in the header.

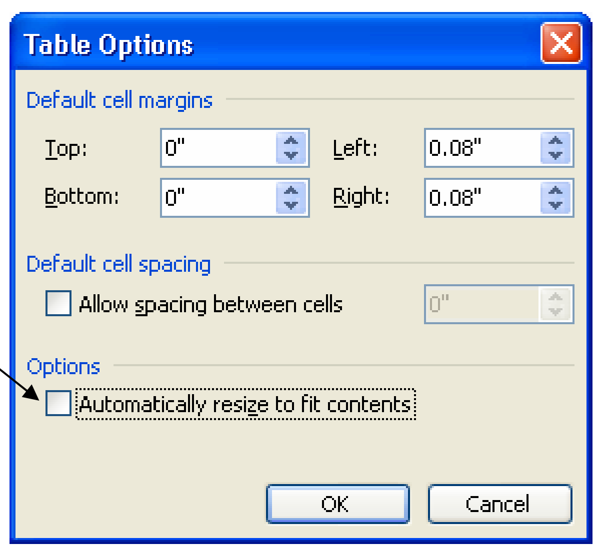
The default setting for tables is to automatically resize to fit contents, which can cause problems in a template. After inserting a table, disable the **Automatically resize to fit contents** setting using the following directions.

7. Right-click the table and click **Table Properties**. The Table Properties dialog box displays:



8. Click **Options**. The Table Options dialog box displays:

Automatically resize to fit contents



9. Click to clear the **Automatically resize to fit contents** check box.

10. Click **OK**. The Table Options dialog box closes.

11. Click **OK**. The Table Properties dialog box closes.

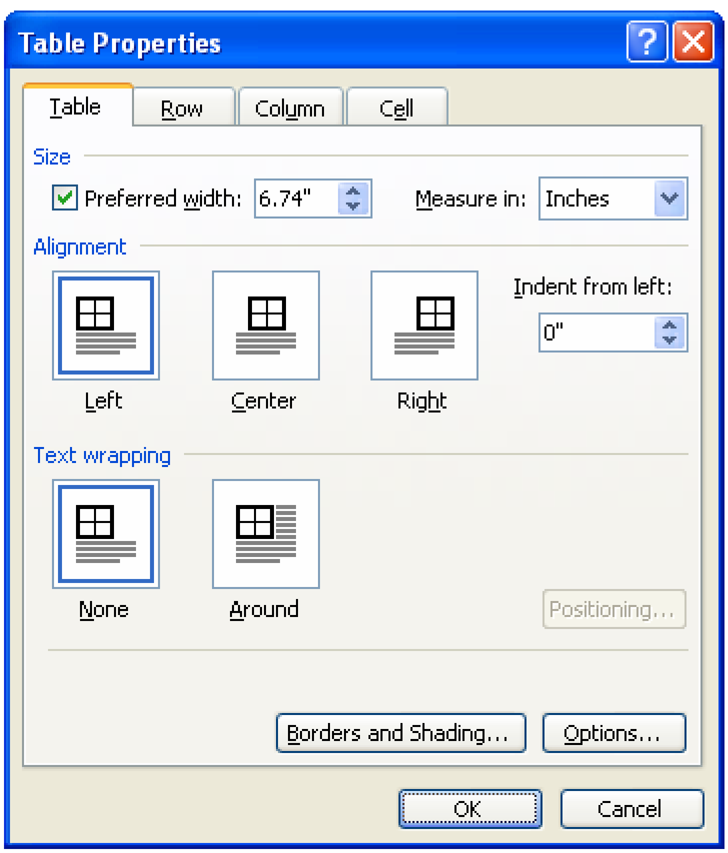
Printing Table Gridlines

After you insert a table, you can select which gridlines you want to print. You can also select an option that does not print any table gridlines.

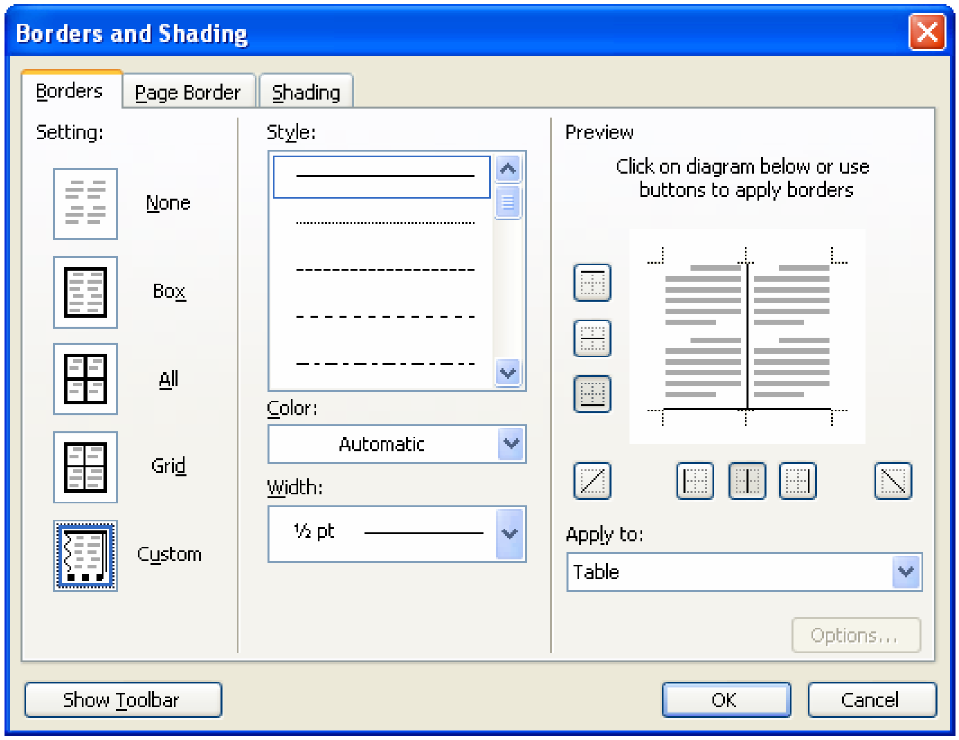
To print table gridlines, follow the steps below:

1. Click in the table that you want to format.

2. Click **Table > Table Properties**. The Table Properties dialog box displays:



3. Click **Borders and Shading**. The Borders and Shading dialog box displays:



If the Borders tab does not display by default, click the **Borders** tab.

4. Do one of the following:

   ⇒ Click **None** in the **Setting** list to print none of the gridlines.

   ⇒ Click **Box** in the **Setting** list to print an outside border around the table.

   ⇒ Click **Grid** in the **Setting** list to print all gridlines. You can use this setting to apply a different style, color, and width to the table border and gridlines.

   ⇒ Click **All** in the **Setting** list to print all gridlines and the outside border of the table. You can use this setting to apply the same style, color, and width to all gridlines and borders in the table.

   ⇒ Click the diagram in the Preview section box to select individual gridlines to print.

🔔 You can also click the buttons in the Preview section box to select the gridlines that you want to print.

5. Click **OK**. The Borders and Shading dialog box closes and returns to the Table Properties dialog box.

6. Click **OK**. The gridlines that you want to print display.

Creating Headings

Insert a sample heading.

To create a new heading in a template, click in the document where you want to insert the heading and type the heading as you want it to display on the report. You can also format the heading. For example, you can type the heading in all caps or apply bold formatting.

Mandatory Headings

Mandatory headings always display in the document in exactly the position they are positioned in the template no matter at which point in the document the MT types them. They also display in the document whether or not the MT types any information for the heading.

When creating mandatory headings, place them outside the <SM-OPTIONAL> statement. You can use either a Standard or an ADT field to enter information, or use an insertion tag. Examples of mandatory headings are:

- <PreoperativeDiagnosis/>
- <PostoperativeDiagnosis/>

☠ It is possible that MTs may mistakenly change headings—for example, Preoperative Diagnosis versus Preoperative Diagnoses.

Creating a Standard for Mandatory Headings

When creating a Standard for mandatory headings, it is best to create the Standard in DocQscribe.

The format rules of heading tags are as follows:

- Use a slash immediately after an opening tag and immediately before a closing tag.
- Use of spaces between words is allowed and preferred so the spell check does not recognize the headings.
- Use two consecutive at symbols (@@) as a stop code.
- Insert a blank line between the stop code and next heading.

You must also create a Standard in DocQmanage under the work type using the following guidelines:

- Because the "Shortcut Key" is the name of the Standard, name it something the MT will recognize.
- Paste the Standard into the text area and save it.
- Note that when you create a Standard for a work type, it will be available the next time you log in to DocQscribe. If you have DocQscribe open at the time you create the Standard, you must log out and completely close DocQscribe and then log in again to view it. To view Standards in DocQscribe, press **Ctrl + S**. The first time you try to view the new Standard, it may not display immediately.

Topic Summary

Review the topic summary.

- Before creating headers and footers, review the requirements to determine if the document has the same headers and footers on all pages.
- Inserting a table in the header allows you to ensure consistency in formatting different text items on the same line.
- To insert a table in a header, click **View > Header and Footer**, click in the header where you want to place the table, click **Table > Insert > Table**.
- To print table gridlines, click in the table that you want to format, click **Table > Table Properties**, click **Borders and Shading**, select the gridlines you want to print, and click **OK**.
- To create a new heading in a template, click in the document where you want to insert the heading and type the heading as you want it to display on the report.

Open the **Simple.rtf** file.

Topic:

Creating the Template Body

The following displays one of the simplest templates that you can create:

<SM-OPTIONAL>

<DEFAULT>
DEFAULT:
<TEXT/>

</DEFAULT>

</SM-OPTIONAL>

When you apply this template to the output from DocQscribe, the resulting document looks like the following:

HEADING:
Some text related to the heading above. It can be a single line or multiple lines. It can contain one or more paragraphs.

HEADING 2:
This is another heading. Notice that the text is positioned one line under the heading. This is determined by the <TEXT/> tag.

You can list the three different tags on a flipchart or dry erase board.

This template uses three different types of tags to create the resulting document:

- SM-Optional
- Default
- Text

Using SM-Optional Tags

Open the **Using Tags.rtf** file to display samples of the three types of tags.

The <SM-OPTIONAL> tag and the corresponding </SM-OPTIONAL> tag mark the area of the report where you specify formatting instructions for headings that may appear in the document, but that should not be formatted in the same manner as the default heading.

You can specify headings and text processing instructions in the <SM-OPTIONAL> section of the report. As the name implies, these headings are only included in the final report if the heading is in the DocQscribe output.

In the example below, the ASSESSMENT and ALLERGIES headings are inside the <SM-OPTIONAL> section. This means they only display in the final document if they were inserted in the DocQscribe output:

```
<SM-OPTIONAL>
<ASSESSMENT>
ASSESSMENT:
<TEXT:L/>
</ASSESSMENT>

<ALLERGIES>
ALLERGIES:
<TEXT:BCU/>
</ALLERGIES>

<DEFAULT>
DEFAULT:
<TEXT/>

</DEFAULT>
</SM-OPTIONAL>
```

Using Default Tags

The <DEFAULT> tag and the corresponding </DEFAULT> tag enclose the instructions that the backend formatting program uses to format any heading/text pairs (from DocQscribe) for which there are no other specific formatting instructions. The next line (DEFAULT:) shows you the format of each heading (in this case they display as Upper Case, Bold and followed by a colon).

Using Text Tags

Finally, the <TEXT/> tag marks the place where the text for the heading begins. The diagrams on this page, and the next, display some variations of this simple template to illustrate how it works. For example, to format a document similar to the one below:

HEADING: Some text related to the heading. It can be a single line or multiple lines. It can contain one or more paragraphs.

HEADING 2: This is another heading. Notice that the text is positioned to the right of the heading. This is determined by the <TEXT/> tag.

create the following template:

```
<SM-OPTIONAL>

<DEFAULT>
DEFAULT:   <TEXT/>

</DEFAULT>

</SM-OPTIONAL>
```

To center the heading, as in the example below:

HEADING:
Some text related to the heading above. It can be a single line or multiple lines. It can contain one or more paragraphs.

HEADING 2:
This is another heading. Notice that the text is positioned one line under the heading. This is determined by the <TEXT/> tag.

Open the **Simple Centered Heading.rtf** file.

create the following template:

```
<SM-OPTIONAL>
<DEFAULT>
                                  DEFAULT:
<TEXT/>
</DEFAULT>
</SM-OPTIONAL>
```

Since there is a high degree of probability that reports will contain heading/text pairs that the template does not define, all templates should always contain some form of this simple template. You can place it anywhere in the overall template, depending on where you want undefined headings to display.

Using Pass-Through Tags

By using pass-through tags, you can create an even simpler template. Essentially, this “empty” tag tells the backend formatting program to copy the DocQscribe output to the final report without applying any formatting rules. It can be useful for things like letters where the customer wants complete control over the output or for producing output not currently supported by the backend formatting program.

You can combine pass-through tags and optional tag blocks if you only want to use pass-through when required. For example, the following template displays a combination of pass-through tags and an optional tag block:

Open the **Pass Through.rtf** file.

```
<SM-OPTIONAL>
<DEFAULT>
DEFAULT:
<TEXT/>

</DEFAULT>

<>
<TEXT:I/>

</>
</SM-OPTIONAL>
```

This tag pair is necessary because the document may begin with text that has no heading; therefore, it should always be included in a template.

Transition: Now that we can create simple templates and use tags, we are ready to start building more complex templates.

Creating Complex Templates

In addition to creating simple templates, you can also create more advanced complex templates that utilize several components of the XML template language. This section covers how you can create a template for the following report:

CITY CLINIC

Patient Name: JOHNSON, SANDRA
Patient ID: 2342523423

ASSESSMENT:

1. Epigastric abdominal pain. Rule out peptic ulcer disease, rule out biliary colic, rule out gastroesophageal reflux, although this is less likely in view of being on proton pump inhibitors, rule out partial small bowel obstruction.
2. History consistent with gastroparesis, note that she was on Propulsid with persistent symptoms. This has some relative contraindication in view of the concurrent use of Phenergan, but she is intolerant to Reglan.
3. Malnutrition and weight loss.
4. Paraplegia following myelitis from disk surgery.
5. Decubitus ulcers.
6. Fever secondary to decubitus ulcers, ?.
7. History of diarrhea, possibly related to Clostridium difficile or other colon pathology including neoplasm.

ALLERGIES:
INCLUDE CODEINE, SULFA, TOZALINONE AND GLUCOCORTICOIDS AND INTOLERANCE TO REGLAN.

SOCIAL HISTORY:
No alcohol or tobacco. She resides at the Speciality Care Center.

PHYSICAL EXAMINATION:
Shows a female who appears in no acute distress. Her current temperature is 100.2, blood pressure 100/52, pulse is 62 and regular. She has bandages over the right and left hip decubitus ulcers. HEENT: Sclerae clear. Oral examination unremarkable except slight redness on the tip on the tongue. Neck: No masses are palpable. Chest clear to auscultation. Cardiovascular: Regular rhythm with no murmurs or gallops. Abdomen is soft, no significant distention, liver measures approximately 8 cm in the midclavicular line, it extends to the midline, there is slight tenderness in the epigastric region and minimal guarding, but no rebound, the spleen is not palpable, no definite masses are palpable.

LABORATORY:
On admission, her white count was 15,000 with 72 segs. Hemoglobin 7.8, hematocrit 24, MCV of 81. SMA-7 remarkable for sodium of 121, chloride of 91, potassium 3.9, BUN 11, creatinine 0.3.

The template that formatted the document on the previous page consists of the following header:

Open the **City Clinic.rtf** file.

CITY CLINIC

Patient Name: <HL7LASTNAME/>, <HL7FIRSTNAME/>
<HL7MIDDLENAMEORINITIAL/>
Patient ID: <HL7PATIENTID/>

The Patient Name: heading is commonly found in several reports. The tag <HL7LASTNAME/> is an insertion point. There are several kinds of insertion points, but regardless of the type, their purpose is to instruct the formatting program to place specific text at that point in the document. In the example above, the tag is an ADT Data Field tag and the value is extracted from the database. If there is no patient name in the database, the template dictates that the Patient Name heading displays as follows:

PATIENT NAME:

The previous example illustrates an important point about specifying headings and insertion points outside of the <SM-OPTIONAL></SM-OPTIONAL> tags. These headings and insertion points always display in the report, even if the formatting program does not find them in the DocQscribe output.

Emphasize the warning note.

You should also note that headings and insertion points specified this way display in that exact order in the final document, regardless of their location in the DocQscribe output. This is a very powerful feature, but one that can cause some very undesirable results if you do not use it properly.

The next line contains the heading for patient ID and the insertion point for that value. Similar to the <HL7LASTNAME/> tag, the value is retrieved from the database (if present) and inserted into the report at this point.

Mention the list of tags in the appendixes at the end.

For a complete list of the database and system supplied tags, see Appendix A: Insertion Point Tags, Appendix B: Preferred Use Tags, and Appendix C: Frequently Used Tags.

You can place insertion point tags a multiple number of times in a template. For example, if your template has a different header and footer for pages subsequent to the first page, you can have some of the same information display in each header and footer by placing the insertion point tag in both.

Using Switches

You can add switches to tags to format items within the tag. Switches instruct the formatting program to apply formatting and search for items, such as lists and tables. By using multiple switches, you can apply multiple formatting options to the tag items.

The template that formatted the document on page 54 consists of the following body:

Open the **City Clinic.rtf** file.

```
ASSESSMENT:
<ASSESSMENT:L/>

ALLERGIES:
<ALLERGIES:BCU/>

<SM-OPTIONAL>
<DEFAULT>
DEFAULT:
<TEXT/>

</DEFAULT>
</SM-OPTIONAL>
```

The first line contains the heading ASSESSMENT: and is followed by the line <ASSESSMENT:L/>. The :L instructs the formatting program to watch for lists in the text, and if it finds them, to format them properly. There are several other switches you can place after the colon that provide additional formatting instructions to the program.

The following table describes various switches you can use:

Review the list of available switches.

Switch	Description
B	Bolds the text in the section.
U	Underlines the text in the section.
I	Italicizes the text in the section.
L	Searches for and formats lists.
T	Searches for and formats tables.
C	Capitalizes the text in the section.
M	Applies mixed case format to the text.
S	Applies lower case (small) to the text.

Due to the flexibility of XML syntax, you can easily add additional switches to a template after you create it.

The next two lines ALLERGIES: and <ALLERGIES:BCU/> provide another example of using the switches with the insertion point tag. In this case, the text is capitalized, bolded and underlined.

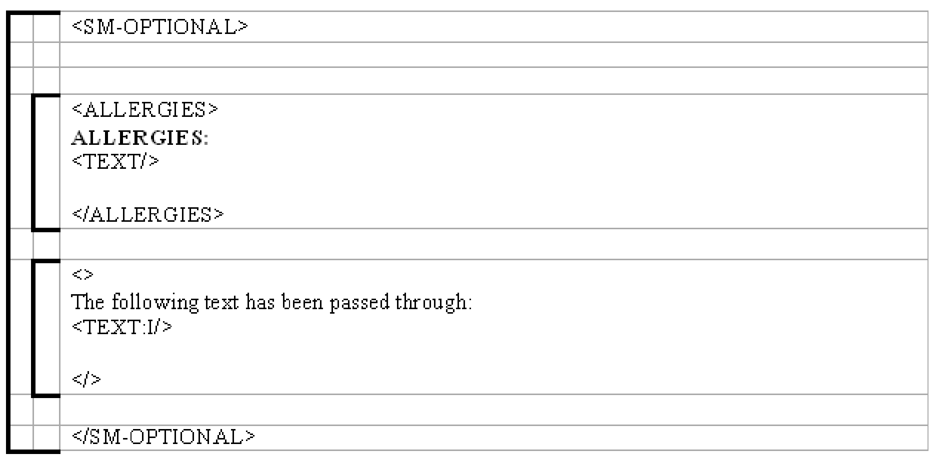
Both the ASSESSMENT and ALLERGIES headings display in the final report regardless of whether they appear in the DocQscribe output or not.

Note that the syntax of these tags is quite different when placed outside the <SM-OPTIONAL> section:

<DEFAULT>
DEFAULT:
<TEXT/>
</DEFAULT>

The remaining heading/text pairs in the DocQscribe output are formatted based on these default rules. In the example, this section of the template formats the headings SOCIAL HISTORY, PHYSICAL EXAMINATION and LABORATORY. The remainder of the template is the <SM-OPTIONAL></SM-OPTIONAL> set of tags.

The following diagram shows how to "read" an SM-OPTIONAL block by showing which lines should be grouped together:



Topic Summary

Review the topic summary.

- The <SM-OPTIONAL> tag and the corresponding </SM-OPTIONAL> tag mark the area of the report where you specify formatting instructions for headings that may appear in the document, but that should not be formatted in the same manner as the default heading.

- The <DEFAULT> tag and the corresponding </DEFAULT> tag enclose the instructions that the backend formatting program uses to format any heading/text pairs (from DocQscribe) for which there are no other specific formatting instructions.

- The <TEXT/> tag marks the place where the text for the heading begins.

- All templates should always contain some form of the simple template to format undefined headings.

- By using pass-through tags, you can instruct the backend formatting program to copy the DocQscribe output to the final report without applying any formatting rules.

- You can add switches to tags to format items within the tag.

Open a template file and insert page number fields.

Topic:
Inserting and Formatting Page Numbers

By using field codes, you can format page numbers various ways. You can insert fields that display the page number and the total number of pages in the document.

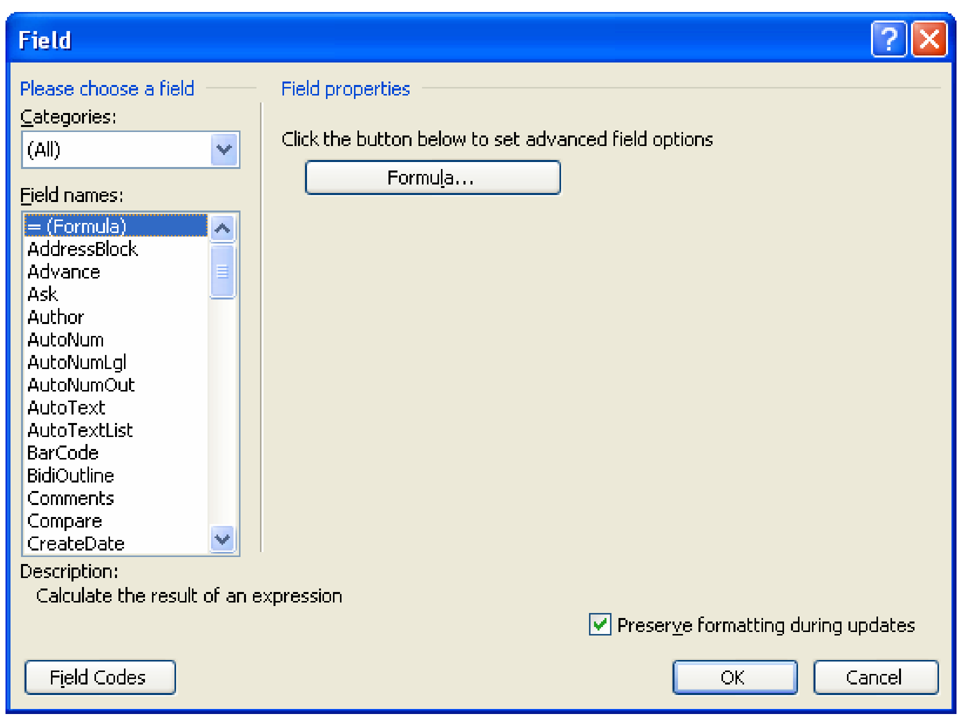
Most often, page numbers are placed in the header or footer. If there is a different first page header and the client wants page numbers on all pages, remember to place the field in both the first and second page headers (or footers).

Inserting Page Number Fields

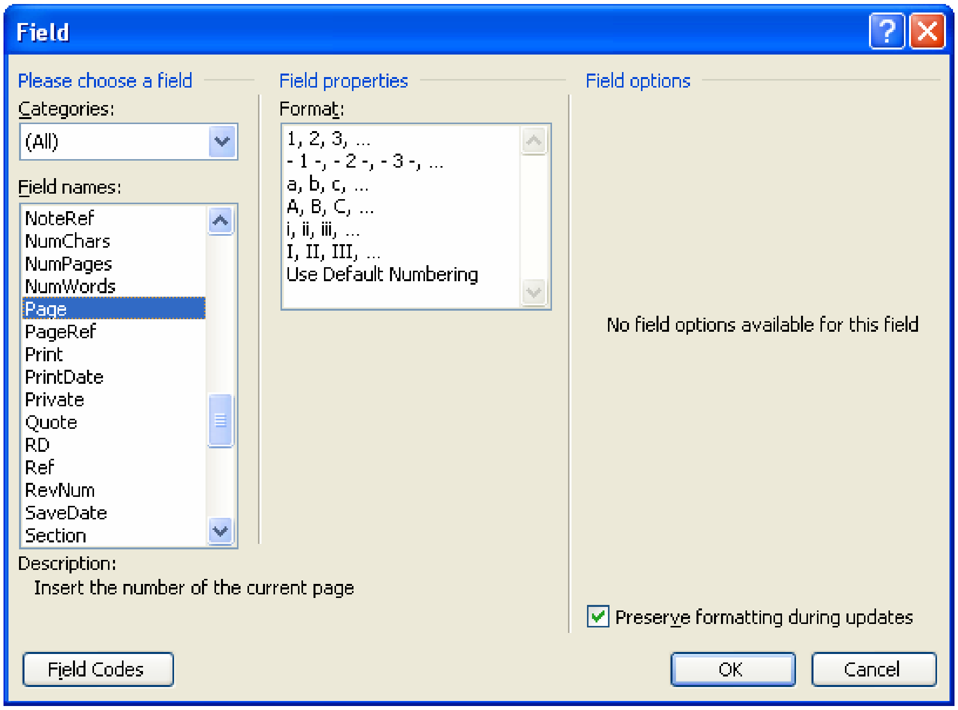
To insert page number fields, follow the steps below:

1. Click in the template where you want to insert a page number field.

2. Click **Insert > Field**. The Field dialog box displays:



3. Click **Page** in the **Field names** list box. The Field dialog box displays the Format list box:



4. Click the **Format** you want to apply to the page numbers in the list box.

5. Click **OK**. The page number field displays in the template.

Press **Alt + F9** to toggle between viewing the field value and the field code.

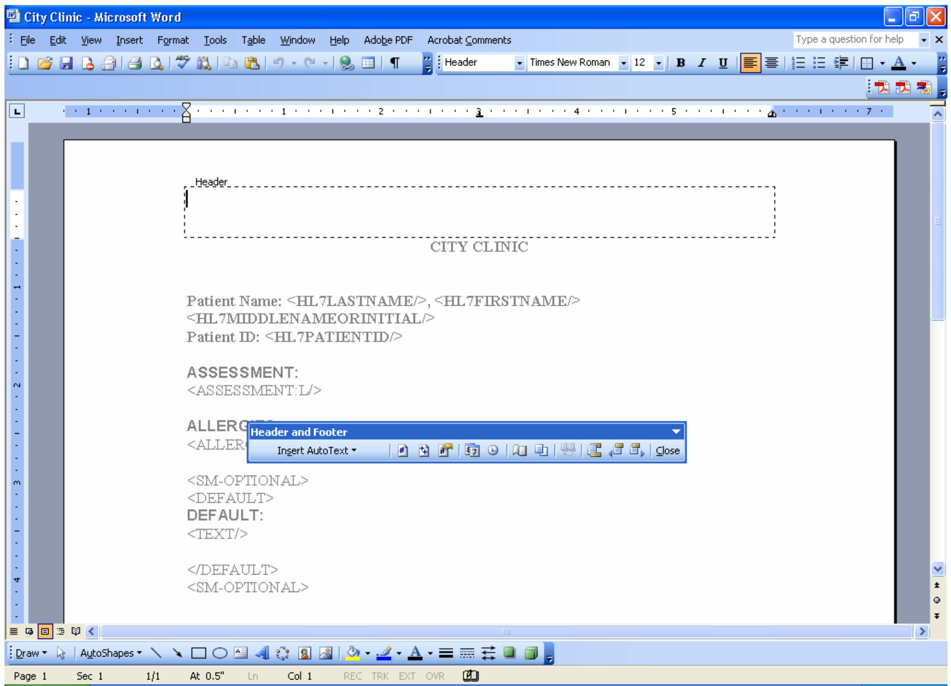
Demonstrate the **Alt + F9** toggle keys.

Inserting Page Number Fields in Headers and Footers

When inserting page number fields in headers and footers, you can use buttons on the Header and Footer toolbar to insert page number fields.

To insert page number fields in headers and footers, follow the steps below:

1. Click **View > Header and Footer**. The Header and Footer view displays:



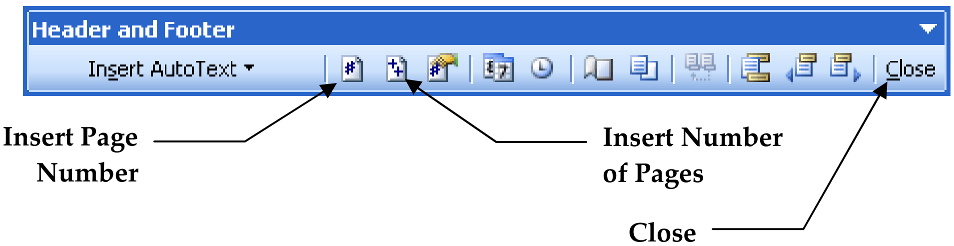
2. Click in the header or footer where you want to insert a page number field.

3. Do one of the following:

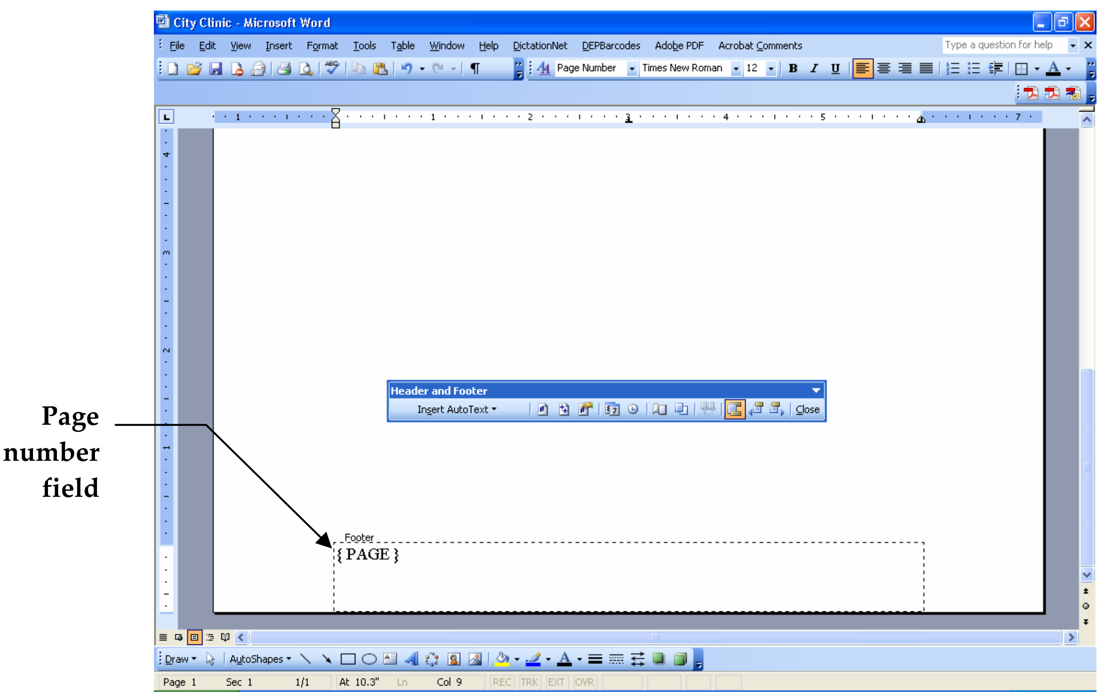
   ⇒ Click **Insert Page Number** on the Header and Footer toolbar to insert a page number field.

   ⇒ Click **Insert Number of Pages** on the Header and Footer toolbar to insert a number-of-pages field.

   The following graphic displays the Header and Footer toolbar:



   The field displays at the insertion point:



4. When you finish, click **Close** on the Header and Footer toolbar.

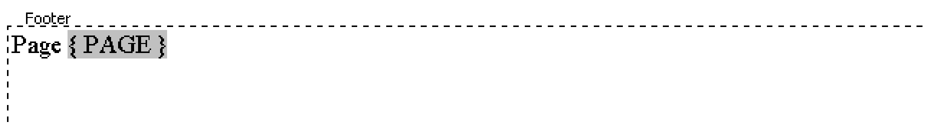
Modify the footer of the default template to create a custom page number format.

Creating Custom Page Number Formats

You can create custom page number formats to add text and match the template requirements. For example, you can combine text with the page number field to create the following format:

Page 1

To create a page number similar to the one above, enter the following text in the template:



Using the Page X of Y Format

Some clients might request page X of Y format that combines text with the page number field and number of pages field. For example:

Page 1 of 2

☠ Formatting page numbers using page X of Y format is a known Microsoft Word bug. It works sometimes, but not all of the time, depending on the Word setup. Verifying that Word has the most current updates can help resolve this issue. However, the MedQuist standard is to use only the page number field. If the client wants to use page X of Y format, they must be informed about the problems with using this format and that if it does not work, the only solution is to use only the page number. Clients requesting page X of Y format must also have this issue added to their scope document as a risk statement.

To format page numbers in page X of Y format, enter the following text in the template:

```
Footer
Page { PAGE } of { NUMPAGES \* MERGEFORMAT }
```

Topic Summary

Review the topic summary.

- By using field codes, you can format page numbers various ways.

- To insert page number fields, click in the template where you want to insert a page number field, click **Insert > Field**, and click **Page** in the **Field names** list box.

- You can create custom page number formats to add text and match the template requirements.

- Formatting page numbers using page X of Y format is a known Microsoft Word bug. It works sometimes, but not all of the time, depending on the Word setup.

Open the **City Clinic.rtf** file and insert the Date Dictated field code. Have the participants do the same.

Topic:
Inserting and Formatting Dates

By using field codes, you can insert the date the report was dictated. You can also apply various date formats, such as July 22, 2005. For example, the following field displays the date dictated field in MMMM, dd, yyyy format:

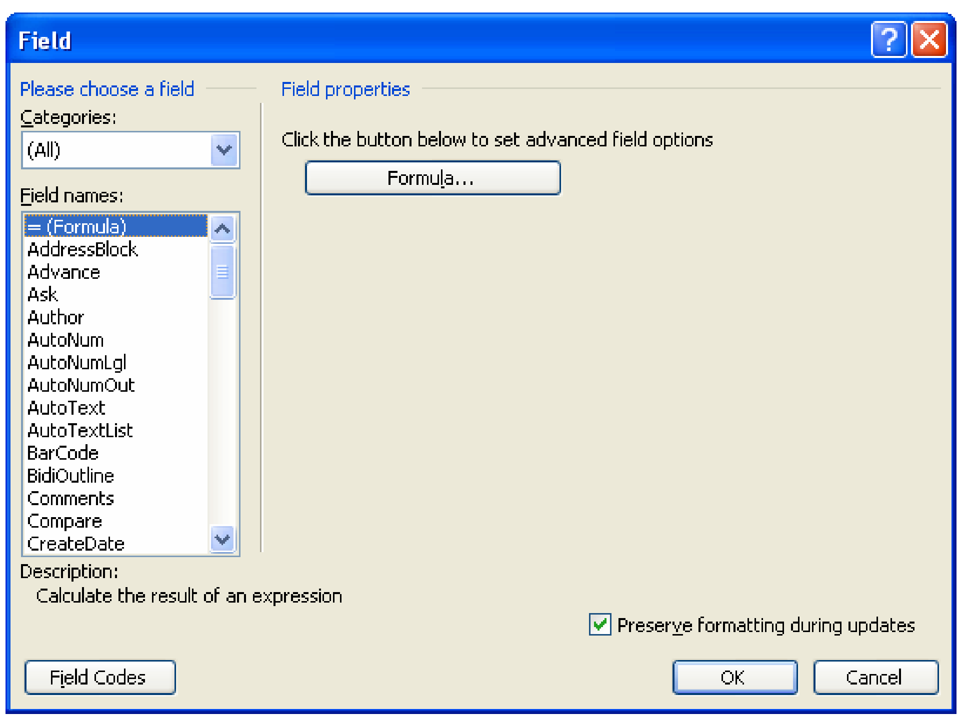
IF "<DATEDICTATED/>" <> "" "<DATEDICTATED/>" \@ "MMMM dd, yyyy" "" * MERGEFORMAT

In the example above, the expression that follows the at (@) symbol defines the date format.

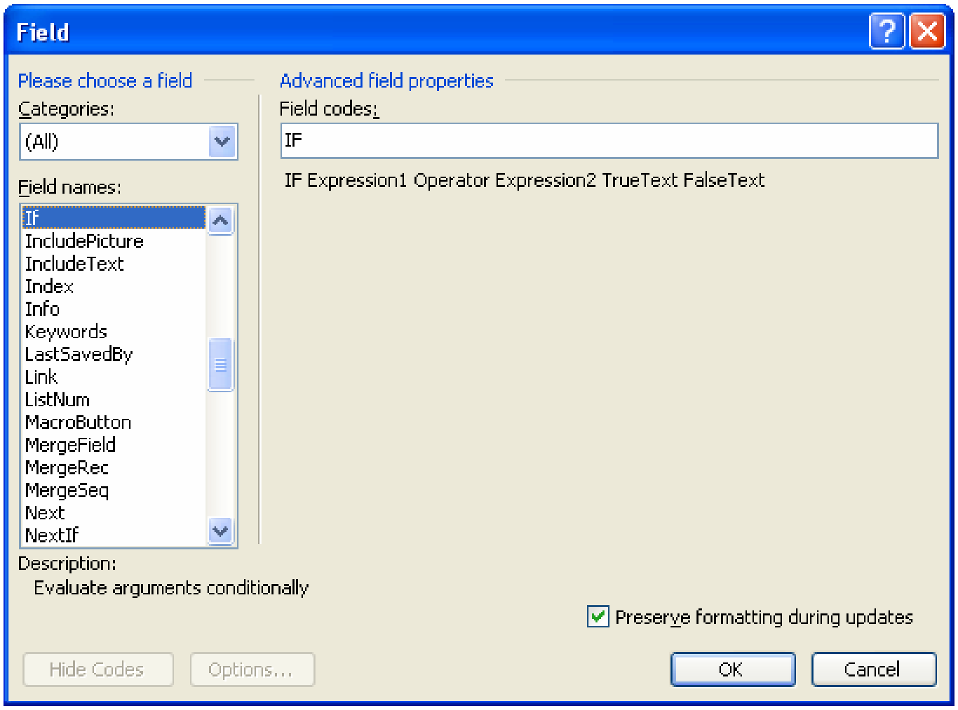
To insert a date field, follow the steps below:

1. Click in the template where you want to insert a date field.

2. Click **Insert > Field**. The Field dialog box displays:



3. Click **If** in the **Field names** list box. The Field dialog box displays the Field codes text box:



4. Enter the **Field codes** in the text box.

5. Click **OK**. The field displays in the template.

Topic Summary

Review the topic summary.

- By using field codes, you can insert the date the report was dictated.

- To insert a date field, click in the template where you want to insert a date field, click **Insert > Field**, click **If** in the **Field Names** list box, enter the **Field codes** in the text box, and click **OK**.

Topic:
Creating Letter Templates

In addition to creating report templates, you can create letter templates. To create a letter template, format the letter template margins and insert fields. For example, you can format the template as follows:

<ADDRESS/>

RE: <HL7LASTNAME>, <HL7FIRSTNAME>
<HL7MIDDLENAMEORINITIAL>
<HL7Patient ID/>

<Body/>

The transcriptionist transcribes:

</ADDRESS/>
Dr. Jones
123 Cherry Lane
Atlanta, GA 30302

</BODY/>
Dear Dr. Jones:

Thank you for your kind referral....

The formatted document displays:

Dr. Jones
123 Cherry Lane
Atlanta, GA 30302

RE: LASTNAME, FIRST NAME MIDDLENAME OR INITIAL
PATIENT MRN

Dear Dr. Jones,

Thank you for your kind referral...

The examples on the preceding page demonstrate how the template populates the formatted document with the patient name and patient ID number.

Topic Summary

Review the topic summary.

- In addition to creating report templates, you can create letter templates.
- To create a letter template, format the letter template margins and insert fields.

Topic:
Creating Signature Block Information

Another element that you can add to a template is a signature block. Adding a signature block ensures consistency in the signature information and job details among the reports. For example, a signature block can consist of the following elements:

- Signature line
- Date and time dictated and transcribed
- Original job number and internal job ID
- Initials

Q The MedQuist standard is to include both the original and internal job numbers on the document. MedQuist standards for signature blocks are as follows:

> Add a signature block to the **Simple.rtf** file. Have the participants do the same.

- The line should be 30 underscore characters.
- Format the font of the <UserSigName/> tag in all caps with no "C" switch.

You must format the case of the <UserSigName/> tag by selecting it and selecting the all caps check box.

- The Internal job number should follow the original job number. For example, Job #: <OriginalJobNo/>/<JobID/>

To add a signature block, follow the steps below:

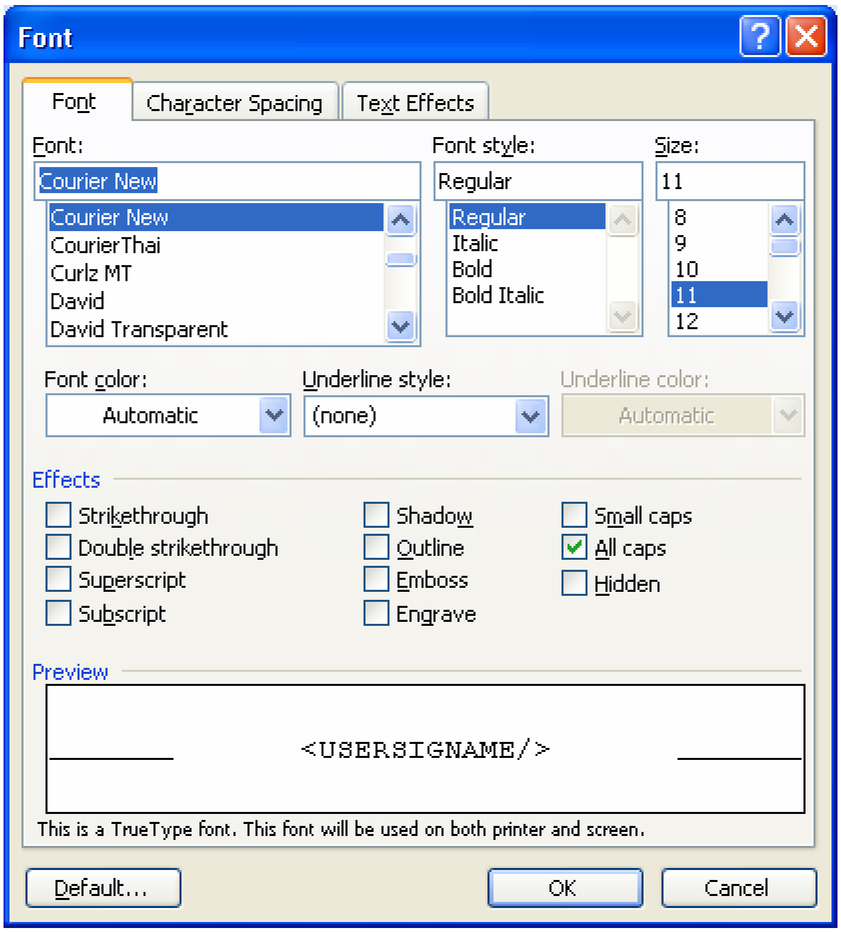
1. Click in the template where you want to insert a signature block.

2. To insert a signature line, enter 30 underscore characters.

3. To insert the <UserSigName>/ tag, click below the signature line and enter the tag.

4. Select the <UserSigName>/ tag.

5. Click **Format > Font**. The Font dialog box displays:



6. Click **OK**.

7. To insert the date and time dictated, enter the <DATETIMEDICTATED/> tag.

8. To insert the date and time transcribed, enter the <DATETIMETRANSCRIBED/> tag.

9. To insert the job number, enter the <OriginalJobNo /> tag.

✍ The original job number is the dictation system job number. This is the job number given to the document author when they are finished dictating the job, and is the one that is most often put in the report.

✍ The Job ID is the internal job number assigned by DEP. This number is rarely put in the report.

10. To enter initials that are consistent on every report, such as "MEDQ", enter the initials where you want them to display.

✍ Always use MEDQ in place of the transcriptionist's initials.

The following displays a sample signature block:

____

<USERSIGNAME:/>

<UserInitials:C/>/MedQ/<MTID/>
DD: <DateTimeDictated/>
DT: <DateTimeTranscribed/>
Job #: <OriginalJobNo/>

Topic Summary

Review the topic summary.

- Adding a signature block ensures consistency in the signature information and job details among the reports.
- To add a signature block, click in the template where you want to insert a signature block, insert a signature line, and insert any other additional tags that you want to display in the report.

Topic:
Creating Courtesy Copies

You can insert If fields in a template to create courtesy copies (CCs).

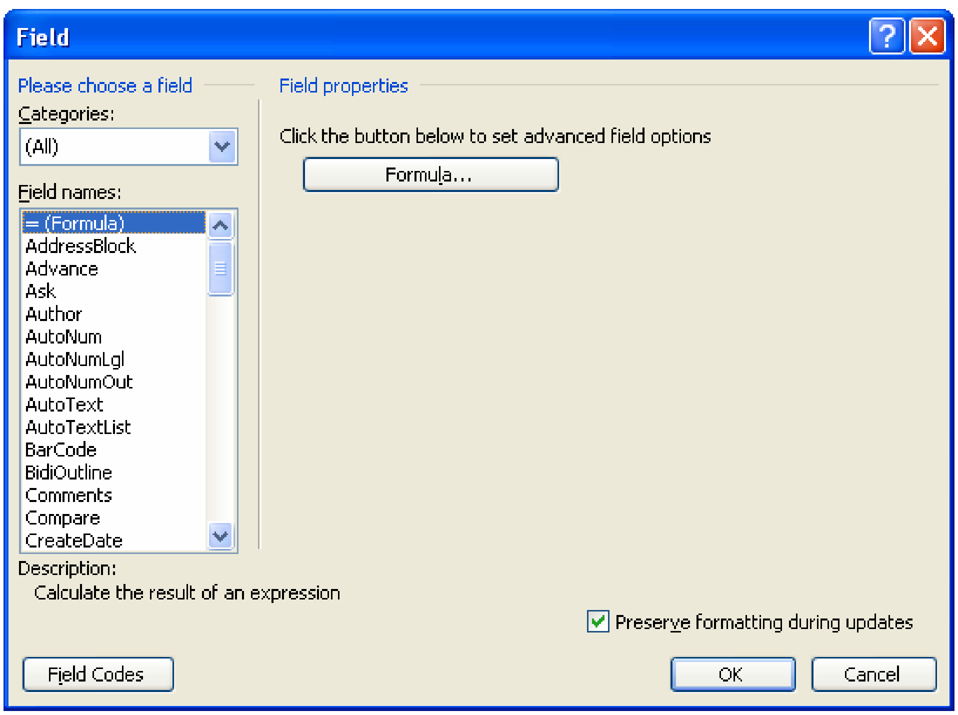
✐ If there are no CCs in the report and you use the If field, the CC block does not display in the document.

Add courtesy copies to the **Simple.rtf** file. Have the participants do the same.

To add courtesy copies to a template, follow the steps below:

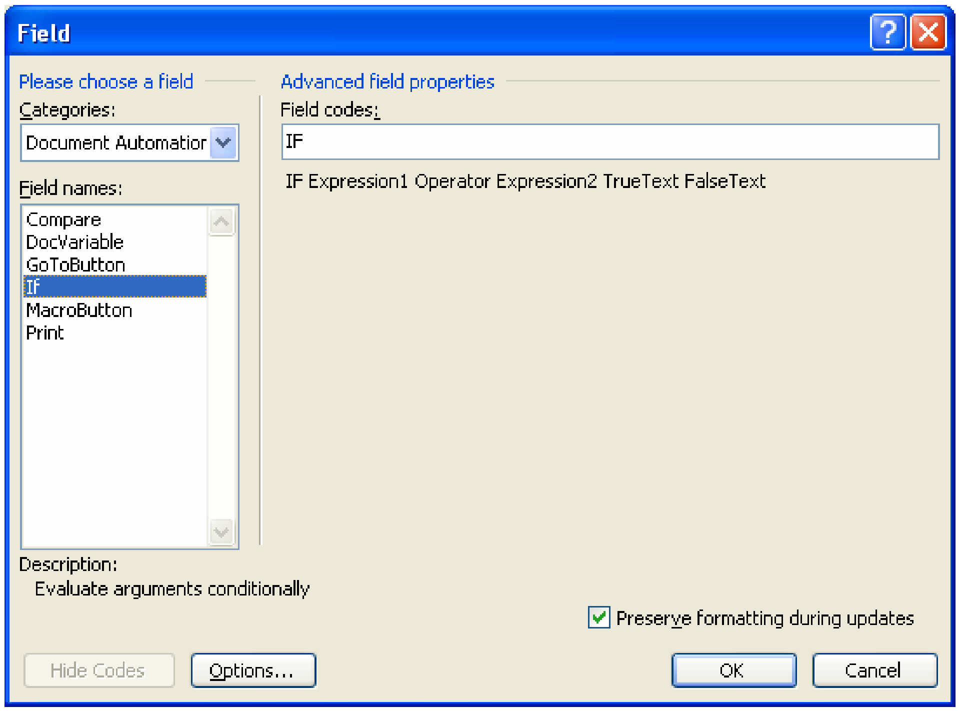
1. Click where you want to insert the CC field.

2. Click **Insert > Field**. The Field dialog box displays:



3. Click **Document Automation** in the **Categories** drop-down list box.

4. Click **If** in the **Field names** list box. The Field dialog box displays the **Field codes** text box:



5. Enter *IF <CCCount/> > 0 """"* in the **Field codes** text box.

6. Click **OK**. The If field displays in the document:

Explain the use of the empty sets of quotes.

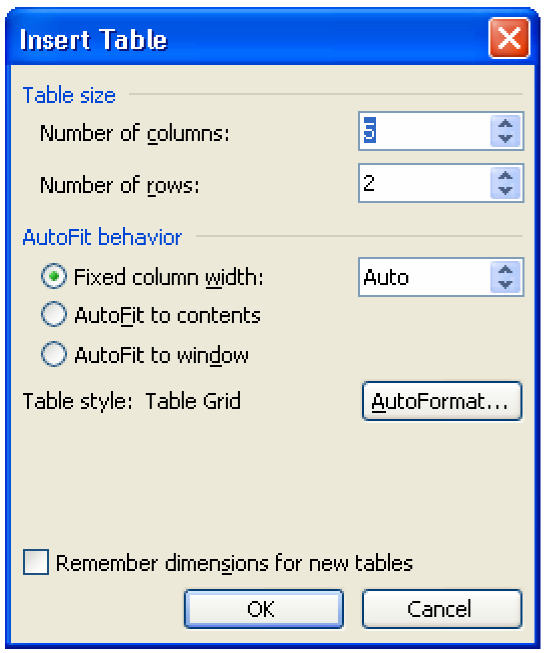
{ IF <CCCount/> > 0 "" "" * MERGEFORMAT }

The first set of empty quotes in the expression contains what you want to display in the document if the statement is true. If the CC Count is greater than zero, the statement is true. The second set of empty quotes contains what you want to display in the document if the statement is false. If the CC Count is not greater than zero, the statement is false.

After inserting the If field, you must enter the text that you want to display in the document as the true value.

7. Click between the first set of quotes in the field code.

8. Click **Table > Insert > Table**. The Insert Table dialog box displays:



9. Enter *2* in the **Number of columns** spin box.

10. Enter *1* in the **Number of rows** spin box.

11. Click the **Fixed column width** option.

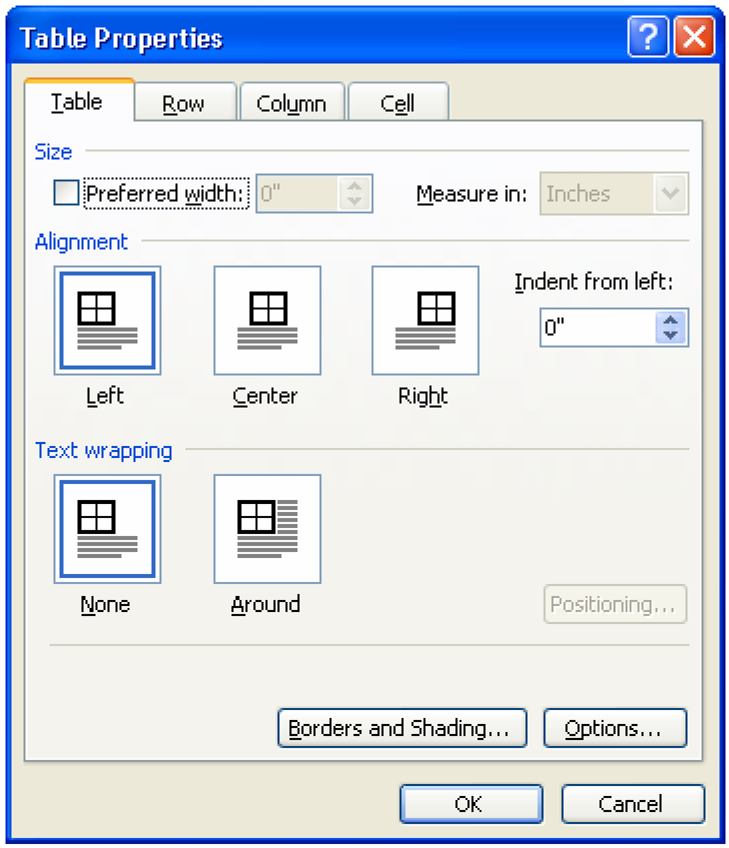
🔔 You can also click the **Up Arrow** or **Down Arrow** to increase or decrease the value in the spin box.

🔔 You can also click **Insert Table** on the Standard toolbar.

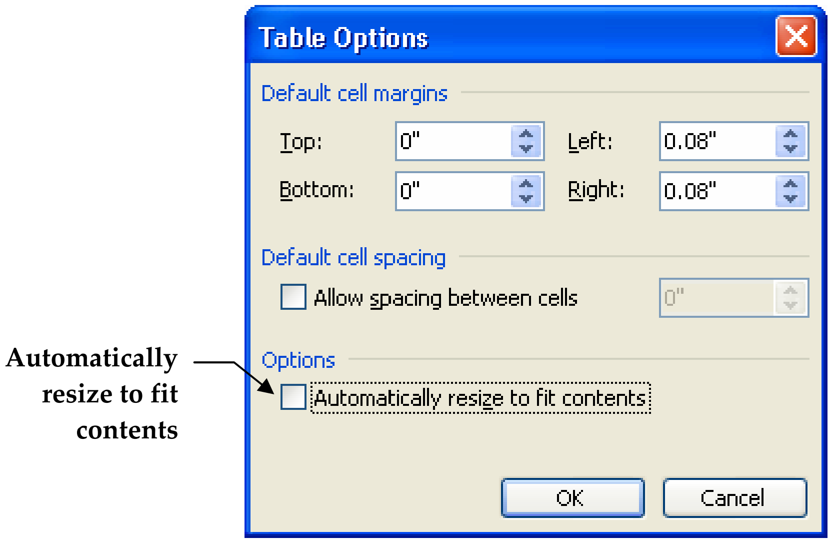
12. Click **OK**. The table displays in the header.

☠ The default setting for tables is to automatically resize to fit contents, which can cause problems in a template. After inserting a table, disable the **Automatically resize to fit contents** setting.

13. Right-click the table and click **Table Properties**. The Table Properties dialog box displays:



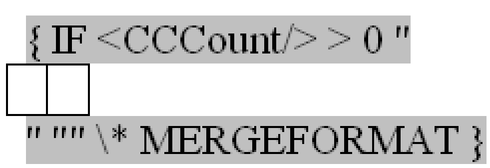
14. Click **Options**. The Table Options dialog box displays:



15. Click to clear the **Automatically resize to fit contents** check box.

16. Click **OK**. The Table Options dialog box closes.

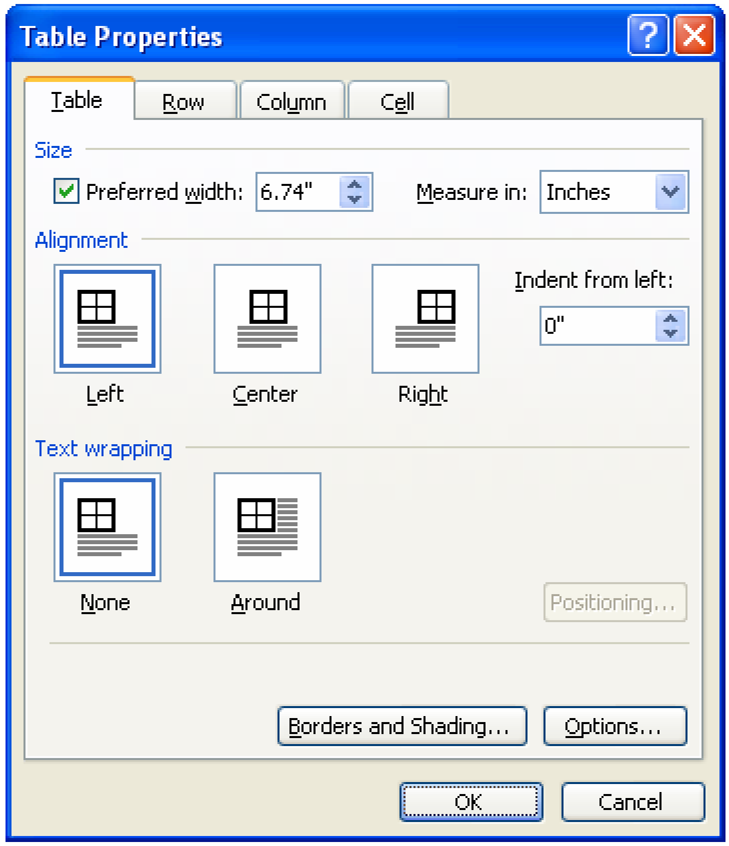
17. Click **OK**. The Table Properties dialog box closes and the table displays in the If field:



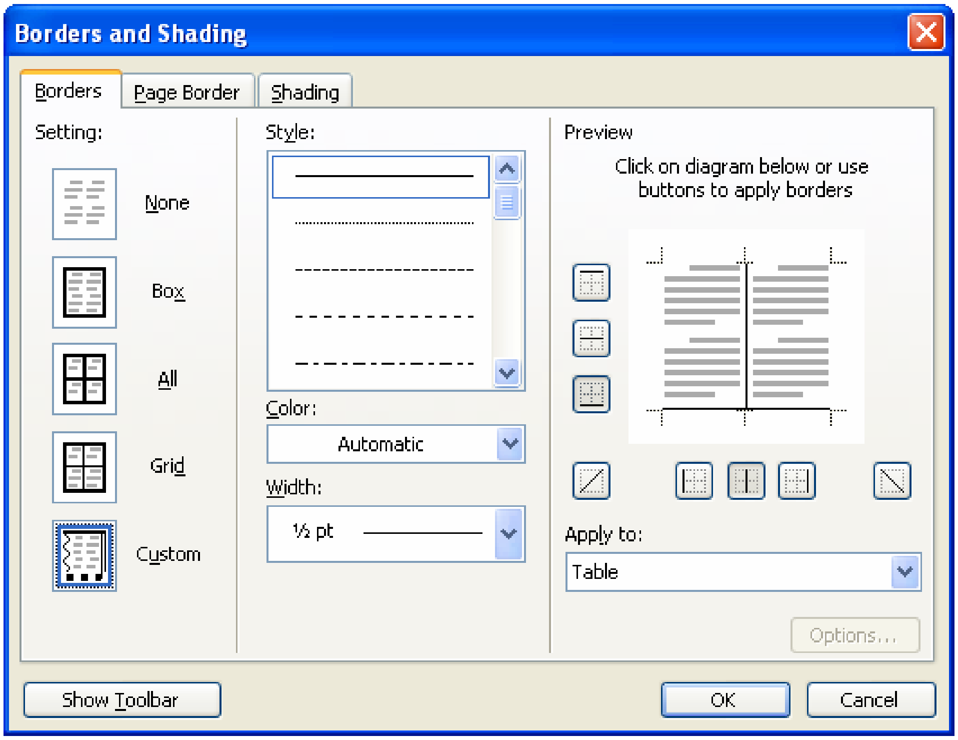
☠ Before adding text to the table, you must remove the borders.

18. Click in the table.

19. Click **Table > Table Properties**. The Table Properties dialog box displays:



20. Click **Borders and Shading**. The Borders and Shading dialog box displays:

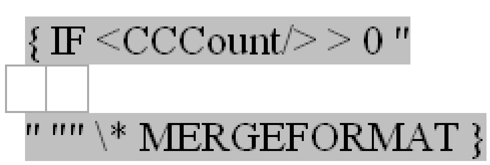


If the Borders tab does not display by default, click the **Borders** tab.

21. Click **None** in the **Setting** list.

22. Click **OK**. The Borders and Shading dialog box closes and returns to the Table Properties dialog box.

23. Click **OK**. The table gridlines do not display:



24. Click in the first table cell and enter *cc:*.

25. Click in the second table cell and enter *<CCList/>*. The CC field is complete.

Using Conditional Statements

The Interface Architect on the team must be notified of every conditional statement in a template so that they can write the code for the translator to ensure that the XML file and the RTF files are identical.

The following list contains guidelines for using conditional statements:

- The "*/MERGEFORMAT" part of a conditional statement needs to be present for formatting numbers and dates, but it is not necessary at other times.

- A best practice is to manually write a conditional statement before writing it in the template. For example, if your template requires that the Attending Physician's initials be present in the document, but the Attending Physician is not always known:

  "IF <HL7ATTENDINGINITIALS/> is not empty:
  TRUE – inserts value in document
  FALSE – does not insert the value.

- You can also enter fields manually by pressing **CTRL + F9**.

- Use the greater than (>) and less than (<) keys only for numeric values. For example:

  { IF <CCCount/> > 0 ….}

- Use equal to (=) or not equal to (<>) for text and numeric values. For example:

  { IF "<HL7CONSULTINGSIG/>" <> "<USERSIGNAME/" "" ..}

- Nested IF Statements are "ANDS" not "ORS." For example, the nested conditional statement below for a double signature line is as follows:

  { IF "<HL7ATTENDINGSIG/>" <> ""
  "{IF"<HL7ATTENDINGSIG/>" <> "<USERSIGNAME/>" "

  <HL7ATTENDINGSIG:C/>" "" } "" }

  The nested conditional statement means the following:

  - If <HL7ATTENDINGSIG/> is not empty and if <HL7ATTENDINGSIG/> is not equal to <USERSIGNAME/> then put in a signature line for the Attending.

  - If <HL7ATTENDINGSIG/> is not empty and if <HL7ATTENDINGSIG/> is equal to <USERSIGNAME/> do nothing.

  - If <HL7ATTENDINGSIG/> is empty, do nothing.

Topic Summary

Review the topic summary.

- You can insert If fields in a template to create courtesy copies (CCs).

- A best practice is to manually write a conditional statement before writing it in the template.

Add the RRSigBlock and RRCCBlock styles to the **Simple.rtf** file. Have the participants do the same.

Topic:
Creating and Applying Signature Block and CC Block Styles

To allow identification and removal of the signature block and CC block for document upload, you must create and apply the RRSigBlock style to signature blocks and create and apply the RRCCBlock style to CC blocks.

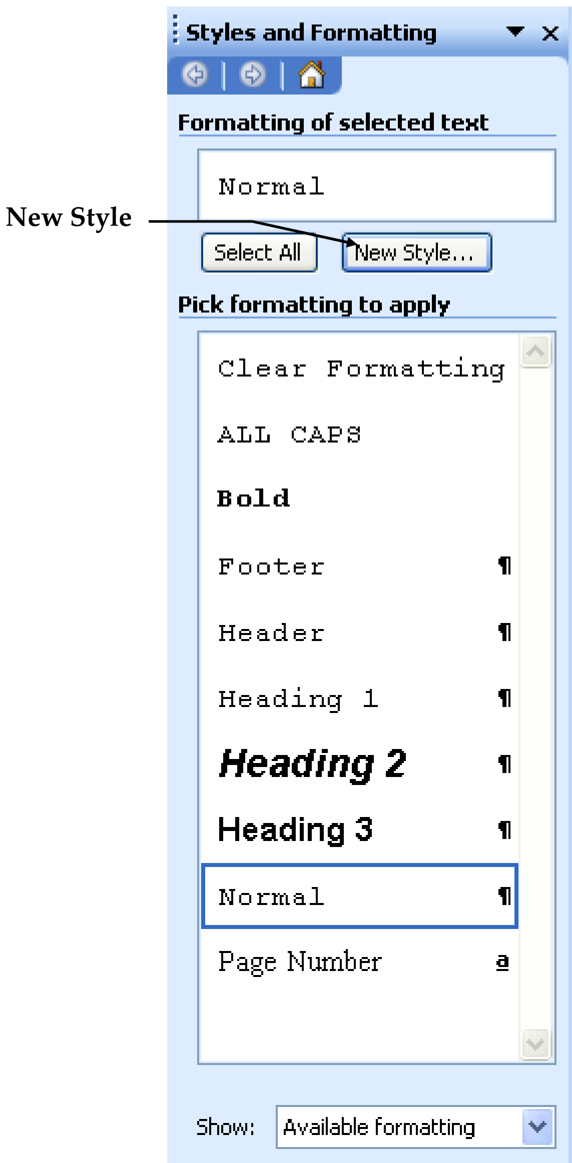
Creating Signature Block and CC Block Styles

When creating RRSigBlock and RRCCBlock styles, you must base both styles on the Normal paragraph style and verify that the Window/Orphan control option is enabled. You must also ensure that neither style has the Keep lines together or the Keep with next options selected.

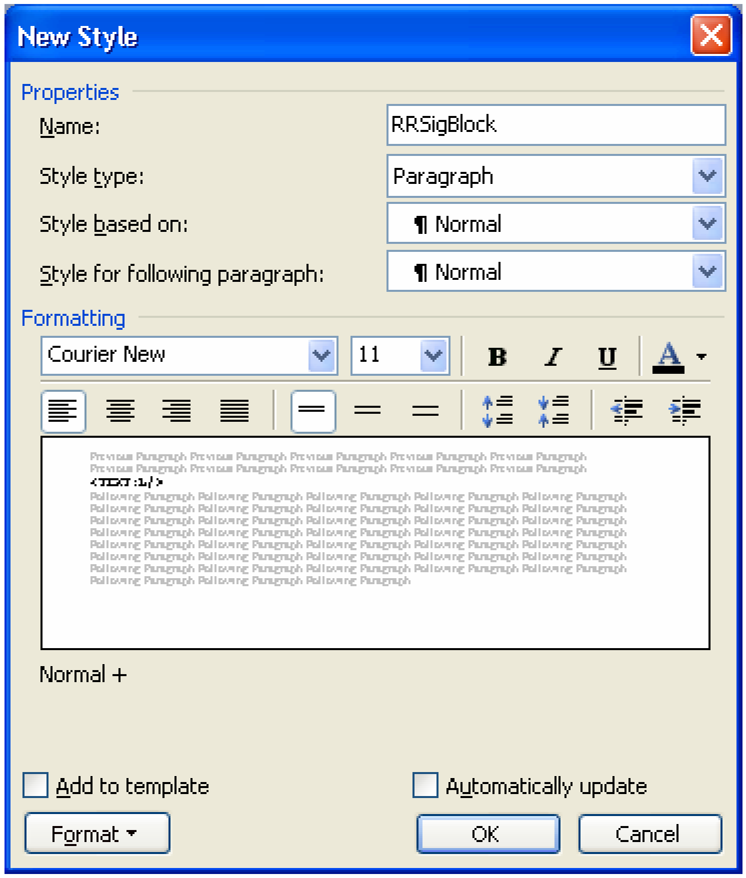
When creating a new style, Word enables the Window/Orphan Control by default.

To create the RRSigBlock and RRCCBlock styles, follow the steps below:

1. Click **Format > Styles and Formatting**. The Styles and Formatting pane displays:



2. Click **New Style**. The New Style dialog box displays:



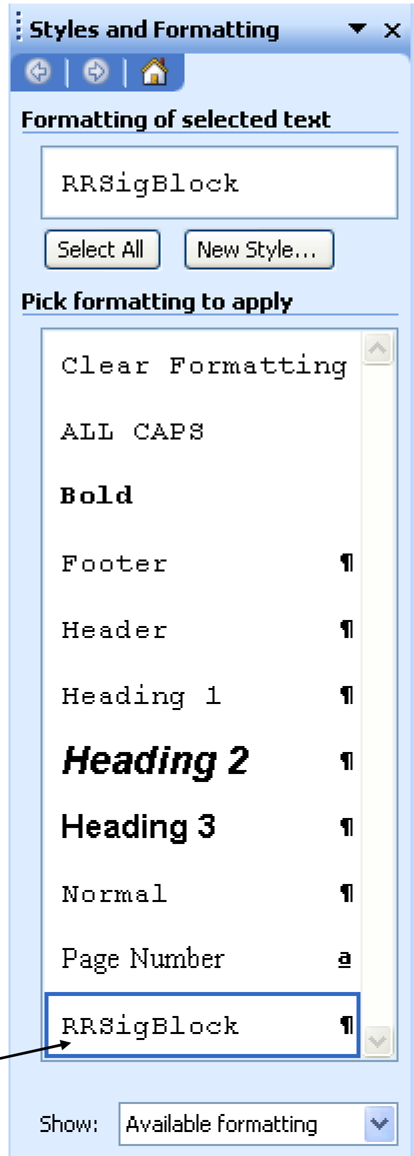
3. Do one of the following:

   ⇒ Enter **RRSigBlock** in the **Name** text box to create the RRSigBlock style.

   ⇒ Enter **RRCCBlock** in the **Name** text box to create the RRCCBlock style.

4. Select **Normal** in the **Style for following paragraph** list box.

5. Click **OK**. The new style displays in the Styles and Formatting pane:



RRSigBlock style

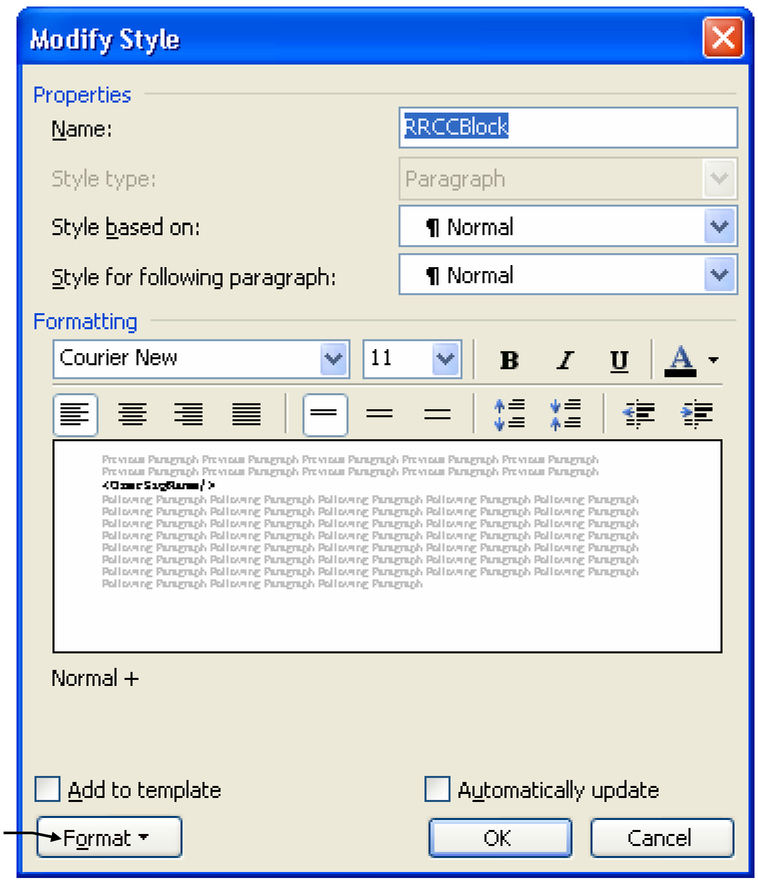
Verify that the style formatting options are correct for the style you created.

Verifying Style Formatting Options

After you create the RRSigBlock or RRCCBlock style, verify that the style's paragraph formatting options are correct.

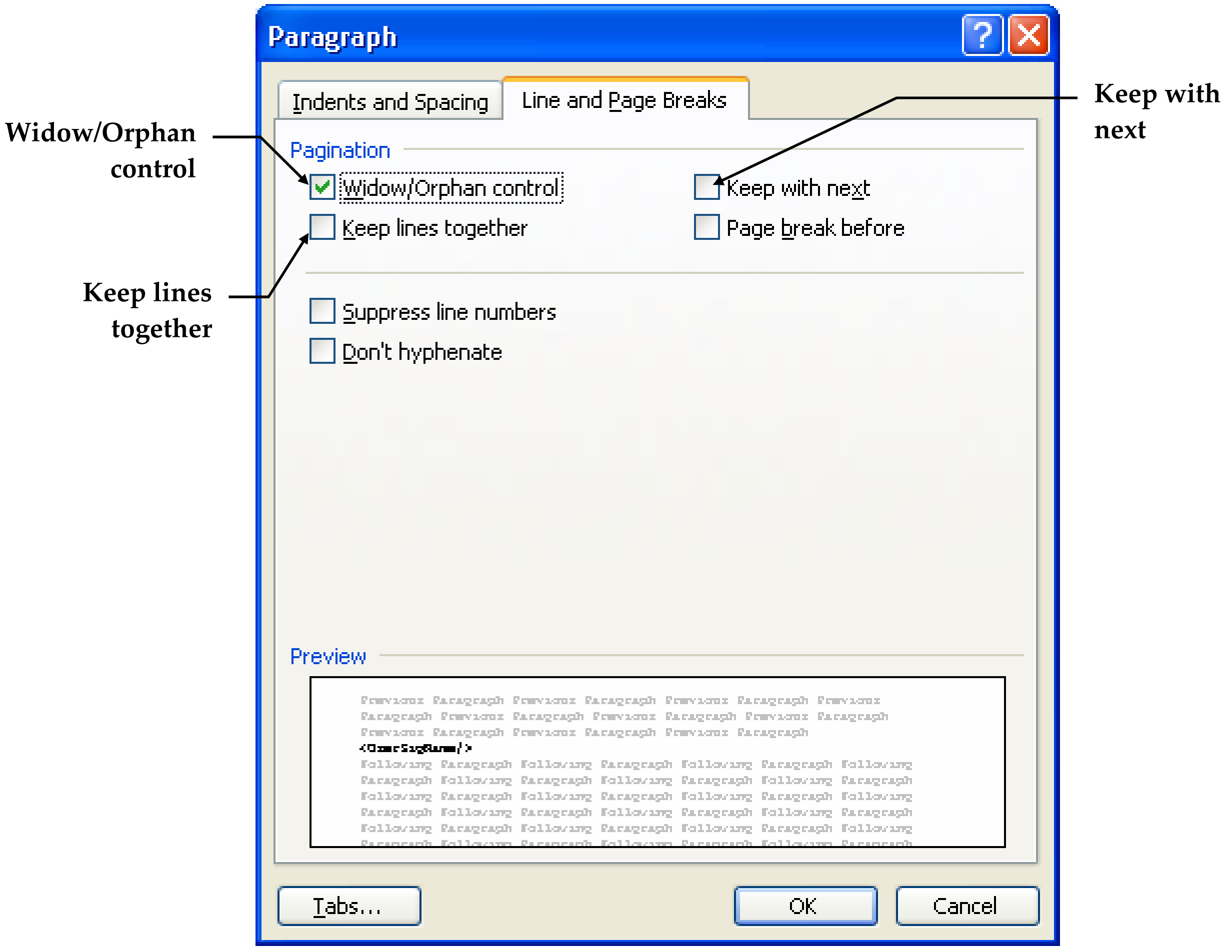
To verify style formatting options, follow the steps below:

1. Right-click the style that you want to verify and click **Modify**. The Modify Style dialog box displays:



Format

2. Click **Format > Paragraph**. The Paragraph dialog box displays:



✍ Click the **Line and Page Breaks** tab if it does not display by default.

3. Verify that the **Widow/Orphan control** check box displays a checkmark.

4. Verify that the **Keep Lines together** and **Keep with next** check boxes are clear.

5. Click **OK**. The Paragraph dialog box closes.

6. Click **OK**. The Modify Style dialog box closes.

Open the **Check Syntax Sample Template.rtf** file and apply the RRSigBlock style to the signature block.

Applying Signature Block and CC Block Styles

After you create the RRSigBlock and RRCCBlock styles, you must apply them to the respective paragraphs in the template.

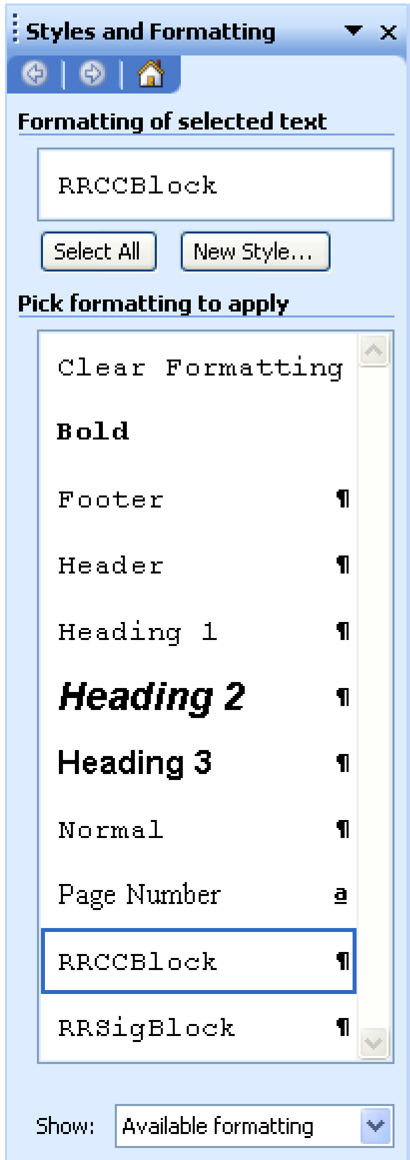
You should apply the RRSigBlock style to the entire block of text that comprises the signature block. This includes everything from "Sincerely," (if present) through the blank lines for the signature, the signature name, the initial line, and any line that has the document information (D: T: JOB#).

Word does not allow you to apply two styles the same paragraph. This means you should place the IF statement for the RRCCBlock on the line immediately following the document information. In addition, you should also format the entire IF statement for the CCs with the RRCCBlock style.

To apply the RRSigBlock and RRCCBlock styles, follow the steps below:

1. Select the signature or CC block that you want to format.

2. Click **Format > Styles and Formatting**. The Styles and Formatting pane displays:



3. Do one of the following:

   ⇒ Click **RRSigBlock** in the **Styles and Formatting** pane to apply the RRSigBlock style.

   ⇒ Click **RRCCBlock** in the **Styles and Formatting** pane to apply the RRCCBlock style.

   Word applies the style.

Topic Summary

Review the topic summary.

- To allow identification and removal of the signature block and CC block for document upload, you must create and apply the RRSigBlock style to signature blocks and create and apply the RRCCBlock style to CC blocks.

- When creating RRSigBlock and RRCCBlock styles, you must base both styles on the Normal paragraph style and verify that the Window/Orphan control option is enabled.

- After you create the RRSigBlock and RRCCBlock styles, you must apply them to the respective paragraphs in the template.

- You should apply the RRSigBlock style to the entire block of text that comprises the signature block.

- To apply the RRSigBlock and RRCCBlock styles, select the paragraphs that you want to format, click **Format > Styles and Formatting**, and click the style that you want to apply in the Styles and Formatting pane.

Module Summary

Review module summary.

- The client requirements for the template determine the page setup.

- To set page margins and header footer margins, click **File > Page Setup**.

- To set the default font, click **Format > Styles and Formatting**, right-click the **Normal** style name and click **Modify**.

- Before creating headers and footers, review the requirements to determine if the document has the same headers and footers on all pages.

- Inserting a table in the header allows you to ensure consistency in formatting different text items on the same line.

- To insert a table in a header, click **View > Header and Footer**, click in the header where you want to place the table, click **Table > Insert > Table**.

- To print table gridlines, click in the table that you want to format, click **Table > Table Properties**, click **Borders and Shading**, select the gridlines you want to print, and click **OK**.

- To create a new heading in a template, click in the document where you want to insert the heading and type the heading as you want it to display on the report.

- The <SM-OPTIONAL> tag and the corresponding </SM-OPTIONAL> tag mark the area of the report where you specify formatting instructions for headings that may appear in the document, but that should not be formatted in the same manner as the default heading.

- The <DEFAULT> tag and the corresponding </DEFAULT> tag enclose the instructions that the backend formatting program uses to format any heading/text pairs (from DocQscribe) for which there are no other specific formatting instructions.

- The <TEXT/> tag marks the place where the text for the heading begins.

- All templates should always contain some form of the simple template to format undefined headings.

- By using pass-through tags, you can instruct the backend formatting program to copy the DocQscribe output to the final report without applying any formatting rules.

- You can add switches to tags to format items within the tag.

- By using field codes, you can format page numbers various ways.

- To insert page number fields, click in the template where you want to insert a page number field, click **Insert > Field**, and click **Page** in the **Field names** list box.

- You can create custom page number formats to add text and match the template requirements.

- Formatting page numbers using page X of Y format is a known Microsoft Word bug. It works sometimes, but not all of the time, depending on the Word setup.

- By using field codes, you can insert the date the report was dictated.

- To insert a date field, click in the template where you want to insert a date field, click **Insert > Field**, click **If** in the **Field Names** list box, enter the **Field code** in the text box, and click **OK**.

- In addition to creating report templates, you can create letter templates.
- To create a letter template, format the letter template margins and insert fields.
- Adding a signature block ensures consistency in the signature information and job details among the reports.
- To add a signature block, click in the template where you want to insert a signature block, insert a signature line, and insert any other additional tags that you want to display in the report.
- You can insert If fields in a template to create courtesy copies (CCs).
- A best practice is to manually write a conditional statement before writing it in the template.
- To allow identification and removal of the signature block and CC block for document upload, you must create and apply the RRSigBlock style to signature blocks and create and apply the RRCCBlock style to CC blocks.
- When creating RRSigBlock and RRCCBlock styles, you must base both styles on the Normal paragraph style and verify that the Window/Orphan control option is enabled.
- After you create the RRSigBlock and RRCCBlock styles, you must apply them to the respective paragraphs in the template.
- You should apply the RRSigBlock style to the entire block of text that comprises the signature block.
- To apply the RRSigBlock and RRCCBlock styles, select the paragraphs that you want to format, click **Format > Styles and Formatting**, and click the style that you want to apply in the Styles and Formatting pane.

Give participants about 10–15 min. to complete these exercises and review the answers.

Performance and Application

Performing Your Skills

To perform the skills introduced in this module, complete the following exercises:

1. Create a new template document with the following margins and save the file as My Template.rtf (Page 33):

    - Top 1″
    - Bottom 0.5″
    - Left 0.5″
    - Right 0.5″

2. To the My Template.rtf file, add the following address to the template header and center the address text (Page 40):

    CITY HOSPITAL
    1000 MAIN ST.
    SPRINGFIELD, AZ 85555

3. To the My Template.rtf file, add a header with the following table (Page 40):

DATE:	**PATIENT NAME:**
<HL7ADTADMITDATE/>	<HL7LASTNAME/>, <HL7FIRSTNAME/> <HL7MIDDLENAMEORINITIAL/>

4. To the My Template.rtf file, add a default heading using SM-OPTIONAL, DEFAULT, and TEXT tags (Pages 49 and 50).

5. To the My Template.rtf file, add a pass-through text tag following the DEFAULT tag pair (Page 52).

6. To the My Template.rtf file, add a heading tag for **ALLERGIES:** after the pass-through closing tag. Add a text tag for the heading and use switches to format the text as bold and mixed case text (Pages 51 and 56).

7. To the My Template.rtf file, add and center page number fields using the following format (Page 60):

   Page [page#]

8. To the My Template.rtf file, add a table at the bottom of the template that contains the following information (Pages 40 and 66):

   - Date dictated
   - Date transcribed
   - Original Job Number and Job ID

9. To the My Template.rtf file, add a signature block that consists of a signature line and the following information (Page 70):

   - User full name and credentials

10. To the My Template.rtf file, add a courtesy copy list to the template below the signature block (Page 73).

✐ For a complete solution to the previous ten exercises, open the **Creating Templates Answer.rtf** file in your Practice folder.

Applying Your Skills

To apply the skills covered in this module at a higher level, complete the following exercises:

1. While reviewing the client requirements for the template headers, you notice that the headers contain information that is not all left justified. How can you create the header in the template to ensure consistency?

Performance and Application Answers

Performing Your Skills Answers

1. Click **File > Page Setup**.
   Enter *1.0* in the **Top** spin box.
   Enter *0.5* in the **Bottom** spin box.
   Enter *0.5* in the **Left** spin box.
   Enter *0.5* in the **Right** spin box.
   Click **OK**.

2. Click **View > Header and Footer**.
   Click in the header and enter the following:
   CITY HOSPITAL
   1000 MAIN ST.
   SPRINGFIELD, AZ 85555

3. Click **View > Header and Footer**.
   Click in the header where you want to place the table.
   Click **Table > Insert > Table**.
   Enter *2* in the **Number of columns** spin box.
   Enter *1* in the **Number of rows** spin box.
   Click **OK**.
   Right-click the table and click **Table Properties**.
   Click **Options**.
   Click to clear the **Automatically resize to fit contents** check box.
   Click **OK**.
   Enter **DATE:** <HL7ADMITDATE/> in the first table cell.
   Enter **PATIENT NAME:** <HL7LASTNAME/>, <HL7FIRSTNAME/> <HL7MIDDLENAMEORINITIAL/> in the second table cell.
   Click **Table > Table Properties**.
   Click **Borders and Shading**.
   Click **None** in the **Setting** list.
   Click **OK**.

4. Click in the template and enter the following tags:
   <SM-OPTIONAL>
   <DEFAULT>
   DEFAULT:
   <TEXT/>
   </DEFAULT>
   </SM-OPTIONAL>

5. Click in the template above the </SM-OPTIONAL> tag and enter the following tags:
   <>
   <TEXT/>

   </>

6. Click in the template above the </SM-OPTIONAL> tag and enter the following:
   <ALLERGIES>
   ALLERGIES: <TEXT:BML/>

   </ALLERGIES>

7. Click **View > Header and Footer**.
   Click in the footer.
   Click **Center** on the Formatting toolbar.
   Enter *Page*.
   Press the spacebar.
   Click **Insert > Field**.
   Click **Page** in the **Field names** list box.
   Click **OK**.

8. Click at the bottom of the template.
   Click **Table > Insert > Table**.
   Enter *4* in the **Number of columns** spin box.
   Enter *2* in the **Number of rows** spin box.
   Click **OK**.
   Right-click the table and click **Table Properties**.
   Click **Options**.
   Click to clear the **Automatically resize to fit contents** check box.
   Click **OK**.

Click **Table > Table Properties**.
Click **Borders and Shading**.
Click **None** in the **Setting** list.
Click **OK**.
Click in the first table cell and enter *DD:*
Press **Tab.**
Enter *<DATEDICTATED/>*.
Press **Tab.**
Enter *Job:*.
Press **Tab.**
Enter *<JOBID/>*.
Press **Tab**.
Enter *DT:*.
Press **Tab**.
Enter *<DATETRANSCRIBED/>*.
Press **Tab.**
Enter *MT:*.
Press **Tab**.
Enter *MEDQ*

9. Click in the template below the </SM-OPTIONAL> tag.
Enter 30 underscore characters to create a signature line.
Click below the signature line and enter *<USERSIGNAME/>*.
Select the <UserSigName>/ tag.
Click **Format > Font**.
Click **OK**.

10. Click in the template below the signature block.
Click **Insert > Field**.
Click **Document Automation** in the **Categories** drop-down list box.
Click **If** in the **Field Names** list box.
Enter *IF <CCCount/> > 0 """"* in the **Field codes** text box.
Click **OK**.
Click between the first set of quotes in the field code.
Click **Table > Insert > Table**.
Enter *2* in the **Number of columns** spin box.
Enter *1* in the **Number of rows** spin box.
Click the **Fixed column width** option.
Click **OK**.

Right-click the table and click **Table Properties**.
Click **Options**.
Click to clear the **Automatically resize to fit contents** check box.
Click **OK**.
Click in the table.
Click **Table > Table Properties**.
Click **Borders and Shading**.
Click **None** in the **Setting** list.
Click **OK**.
Click in the first table cell and enter *cc:*
Click in the second table cell and enter <*CCList/*>.

Applying Your Skills Answers

1. If some of the information in the headers is not left justified, you can insert a table in the header.

Module 3:
Working with Templates

Review module description and performance objectives.

Module Description

This module covers working with existing templates. The topics in this module provide instructions for uploading and downloading templates to and from DocQmanage. Topics also cover creating back up copies and testing templates.

Module Performance Objectives

After completing this module, you will be able to:

- upload and download templates and create back up copies.
- test templates.

Module Prerequisites

To understand the concepts and perform the tasks in this module, you should know how to:

- log in and use DocQmanage.
- log in and use DocQscribe.
- use Windows with basic to intermediate skills.
- use Microsoft Word with basic to intermediate skills.
- create and modify templates.

Topic:
Downloading and Uploading Templates and Creating Back Up Copies

After you create a template, you can upload it to DocQmanage for testing. You can also download other templates and modify them.

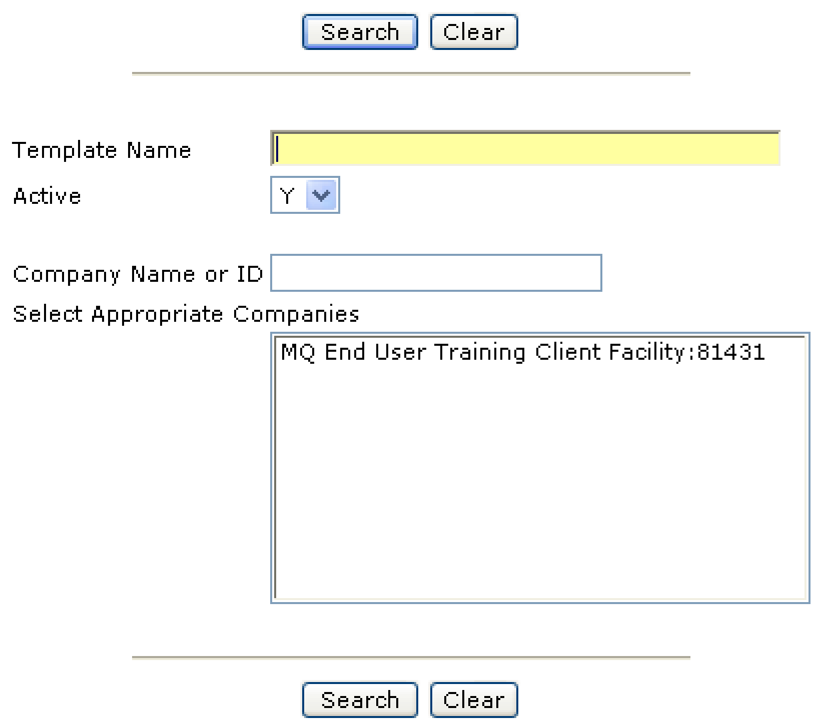
Demonstrate downloading a template. Have the participants do the same.

Downloading Templates

To download a template, follow the steps below:

1. Log in to DocQmanage.

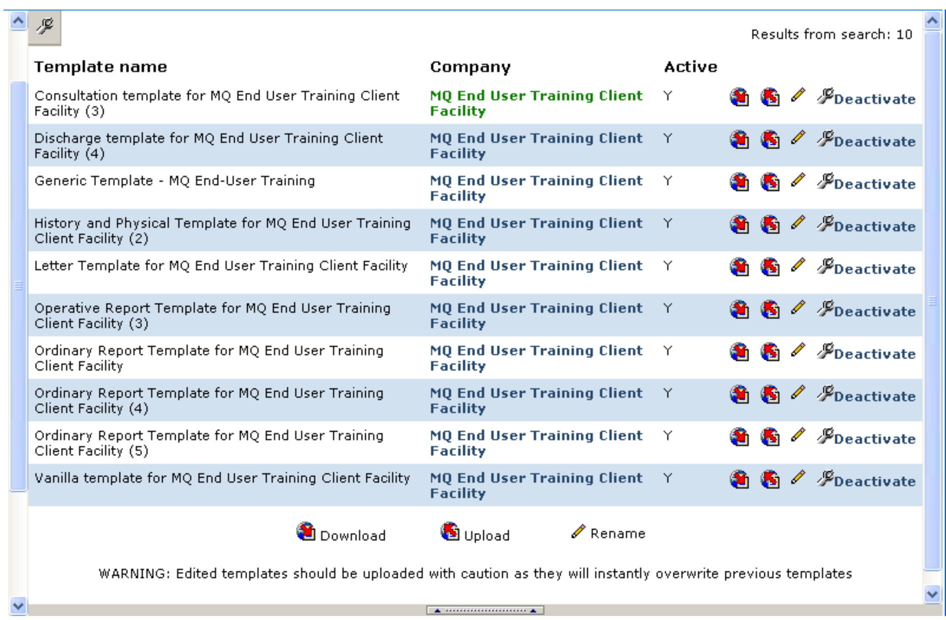
2. Click **Setup > Templates > Search**. The Template Search page displays:



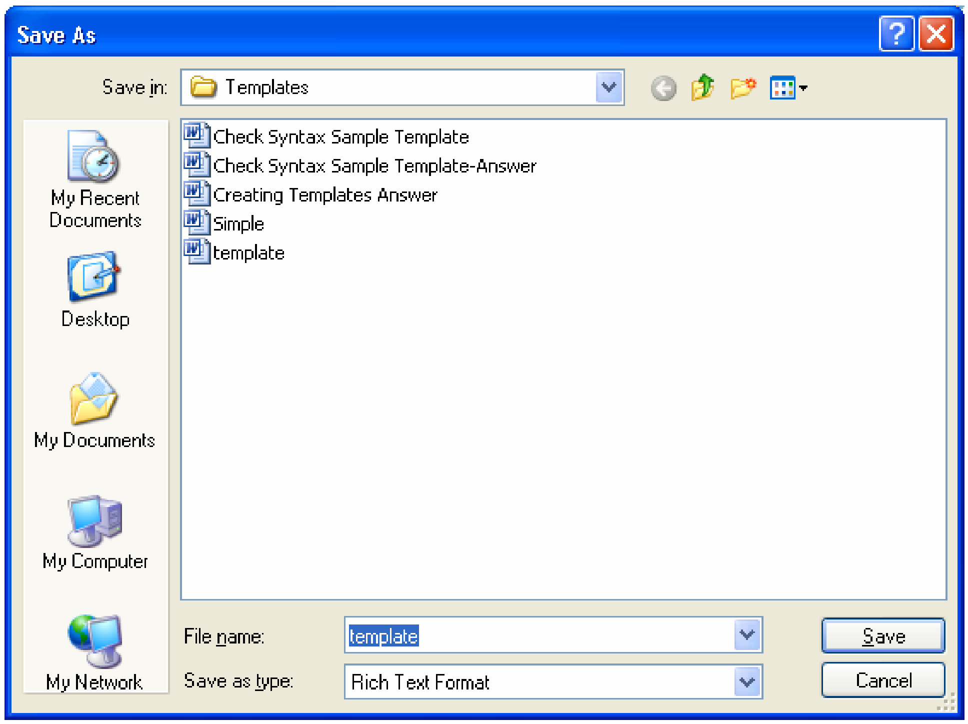
3. Enter your search criteria in the following fields:

Field	Procedure
Template Name	Enter the name of the template.
Active	Select whether the template is active or not.
Company Name or ID	Enter the company name or company ID number.
Select Appropriate Companies	Select all the companies that use the template.

4. Click **Search**. The templates matching your search criteria display:

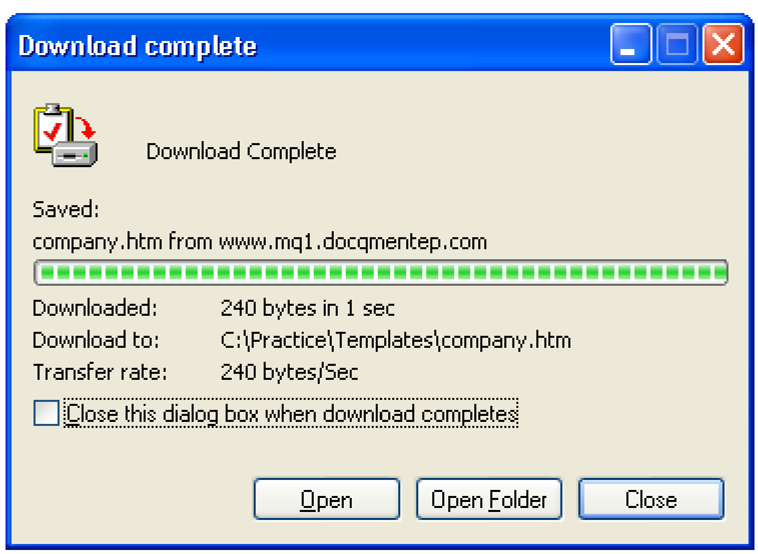


5. Right-click **Download**  next to the template that you want to download and click **Save target as**. The Save As dialog box displays:



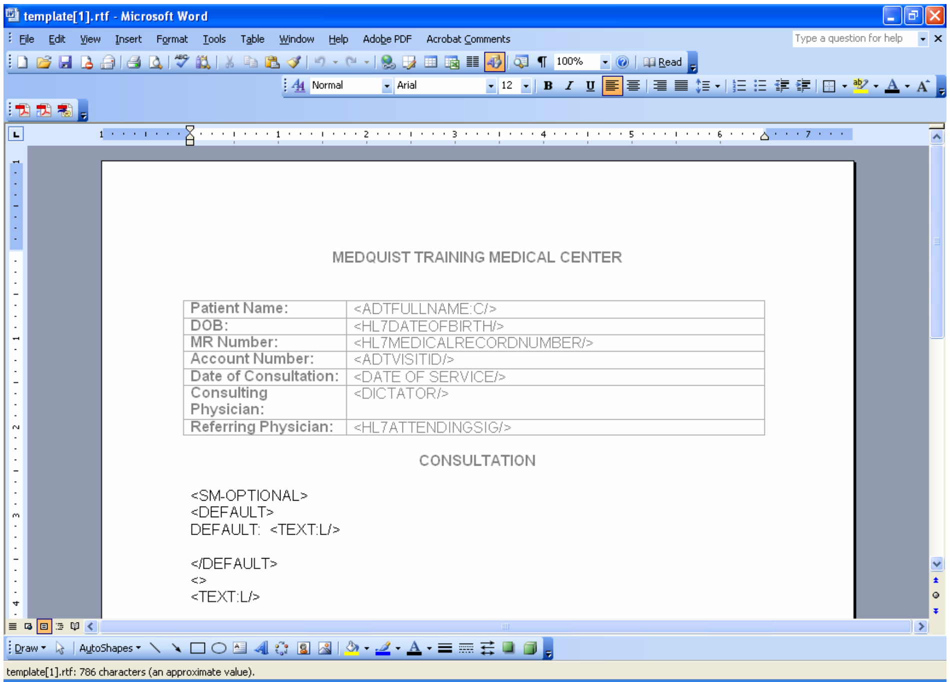
6. Enter the **File name** in the combo box.

7. Click **Save**. The Download complete dialog box displays:



8. Do one of the following:

⇒ Click **Open** to open the document in Word. The document displays in Word:



⇒ Click **Open Folder** to view the contents of the folder to which you downloaded the file.

⇒ Click **Close** to close the Download Complete dialog box.

✍ To modify the template, open the template file in Word.

Creating Back Up Copies

Emphasize the warning note.

☠ Before uploading the template to the live site, it is highly recommended that you create a back up copy of the original template and make sure all DocQscribe users are logged off. If DocQscribe users are still logged in, they could have a work type that is associated with the template you are modifying.

The original works, but the modified template may not. Creating a back up copy allows you to revert back to the original.

Q It is suggested that you use version numbers in file naming conventions. This helps you track changes to verify which modifications work best and prevents you from overwriting an existing template.

To create a back up copy, save a copy to your local hard drive. You can save it to a folder in which you save back up copies only and name it as a backup copy.

Copying Files from Windows Explorer

Demonstrate copying a file.

From Windows Explorer, you can use shortcut menus and commands to quickly copy and paste files into their source folders. Copying and pasting a file into its source folder automatically creates a copy of the file. Windows adds "Copy of" to the beginning of the file to distinguish the copy from the original.

To create a copy of a file in Windows Explorer, follow the steps below:

1. From Windows Explorer, right-click the file for which you want to create a back up and click **Copy**.

2. Right-click the folder that contains the original file and click **Paste**. A copy of the file displays in the folder.

Uploading Templates

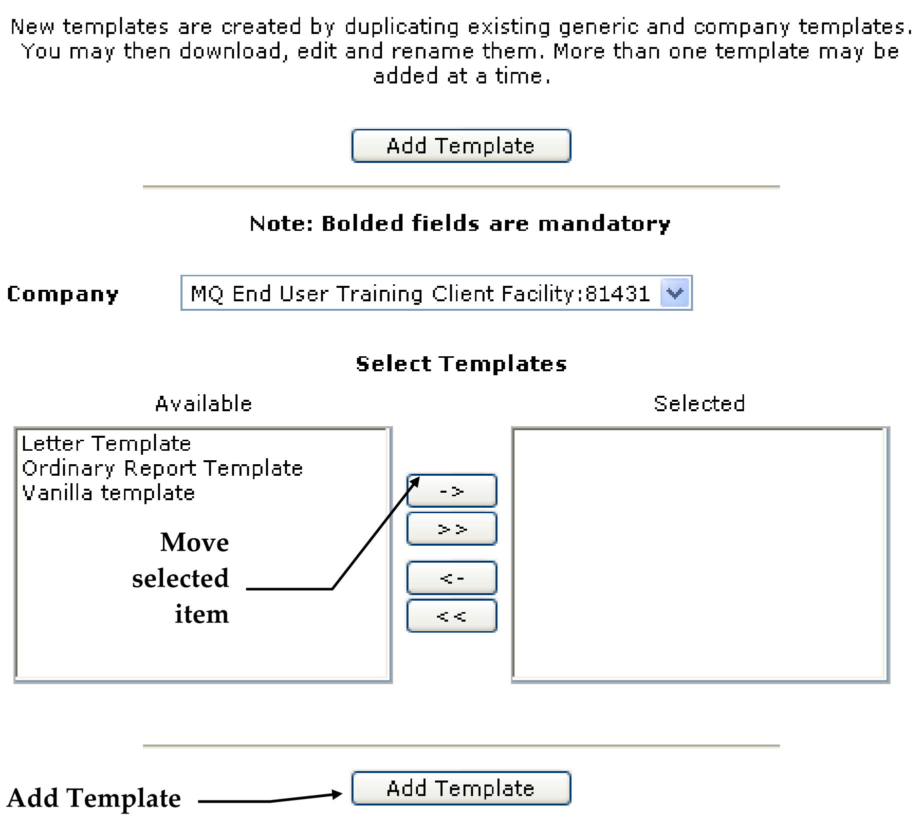
After modifying or creating a template, you can upload the template to DocQmanage.

Any time you upload a template, you are overwriting an existing template even if the file you are uploading has a different file name. This means that to upload a new template, you must add a template file, rename it, and overwrite the file that you added with a new file.

To upload a template, follow the steps below:

1. Log in to DocQmanage.

2. Click **Setup > Templates > Add**. The Add Template page displays:



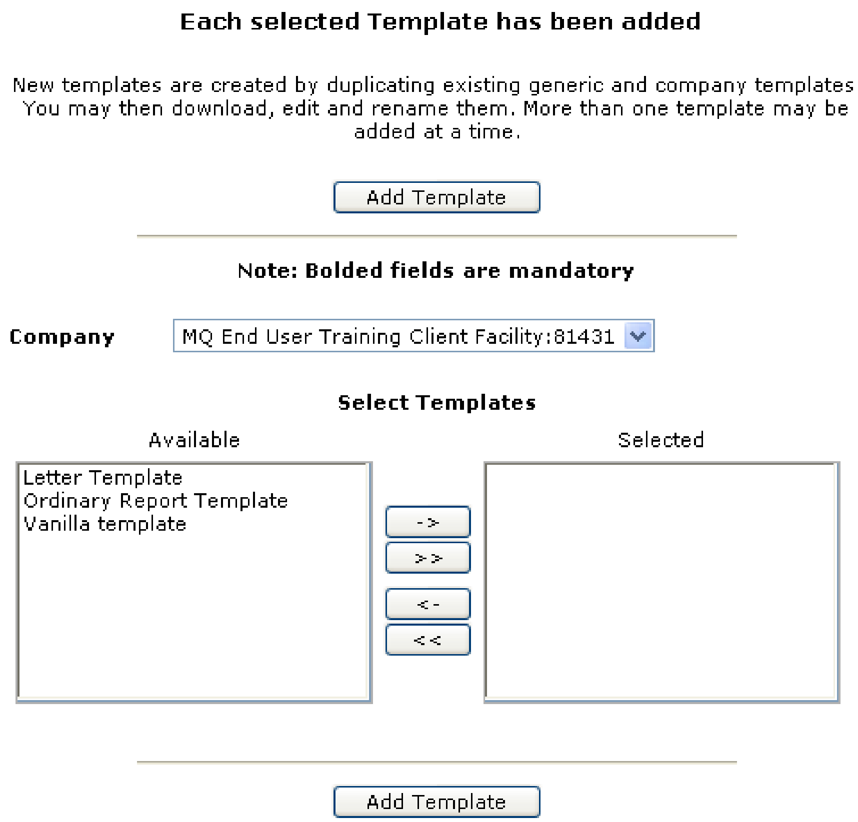
Demonstrate uploading a template.

You can have the participants do the same. If the participants have the same template, they will overwrite each other.

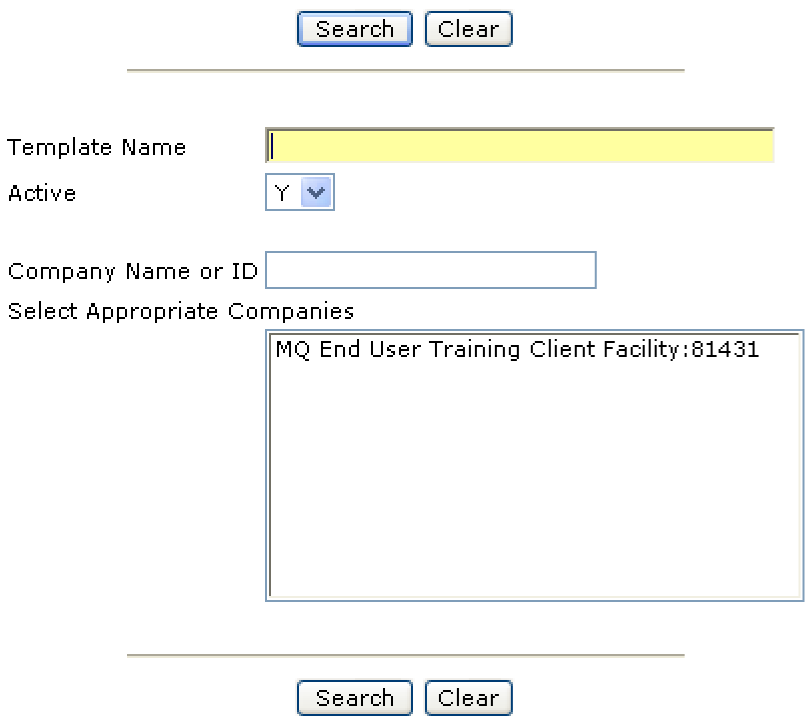
Each participant will upload and test their own template in the exercises at the end of the module.

3. Select the template that you want to add in the **Available** list box and click **Move selected item**.

4. Click **Add Template**. The Templates page displays:



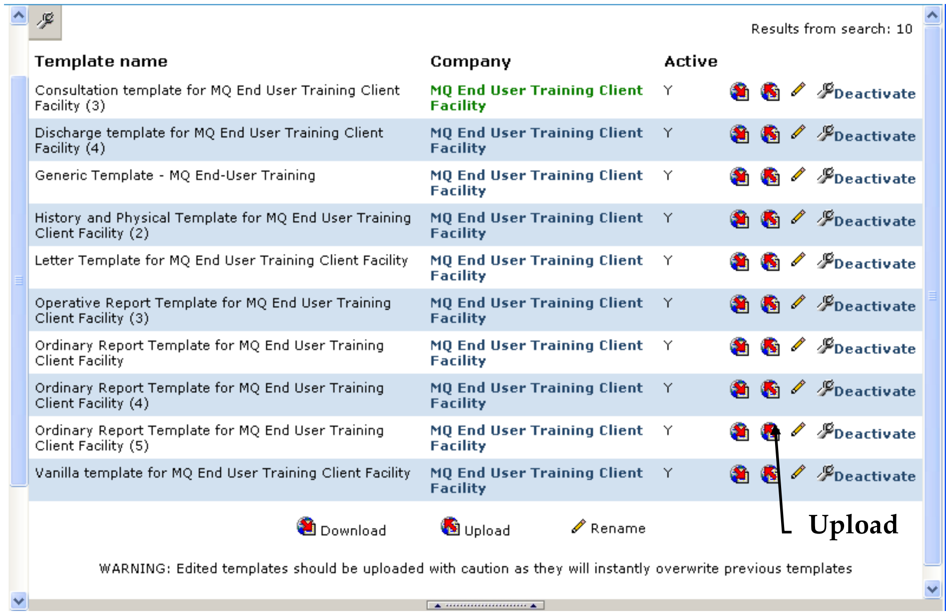
5. Click **Setup > Templates > Search**. The Template Search page displays:



6. Enter your search criteria in the following fields:

Field	Procedure
Template Name	Enter the name of the template.
Active	Select whether the template is active or not.
Company Name or ID	Enter the company name or company ID number.
Select Appropriate Companies	Select all the companies that use the template.

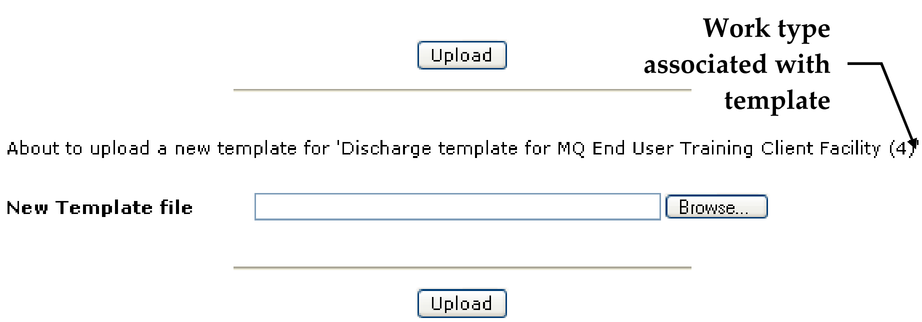
7. Click **Search**. The templates matching your search criteria display:



The file name displays an incremental number indicating the number of times the template has been added. The file displaying the highest number is the most recent version.

When you upload a template, it overwrites the existing template.

8. Locate the recently added template that you want to overwrite and click **Upload**. The Upload template page displays:

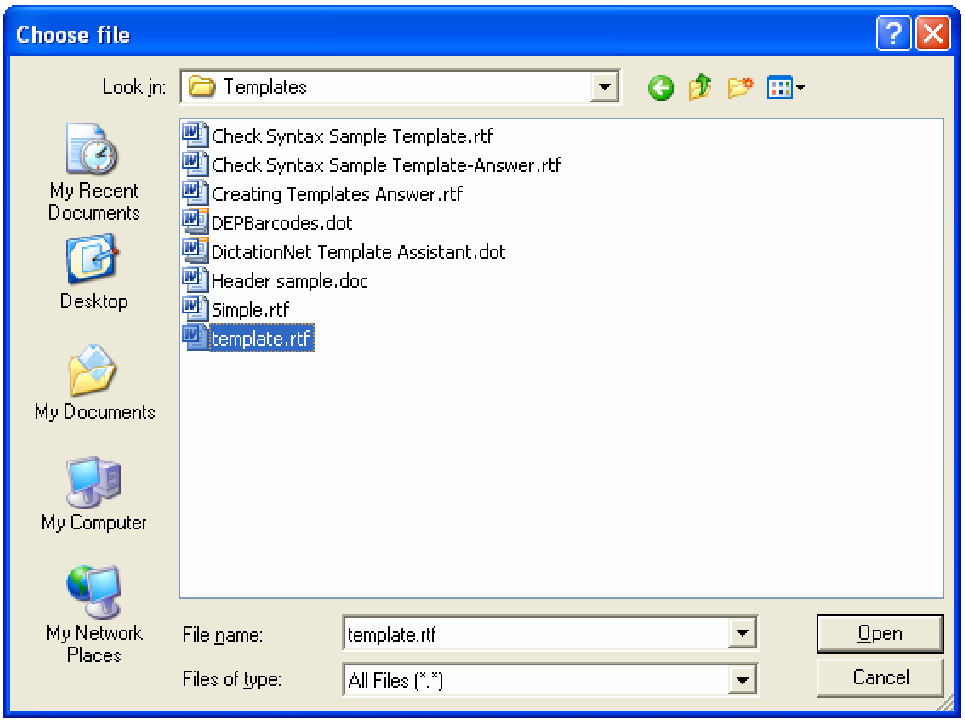


The Upload template page displays the work type associated with the template.

9. Do one of the following:

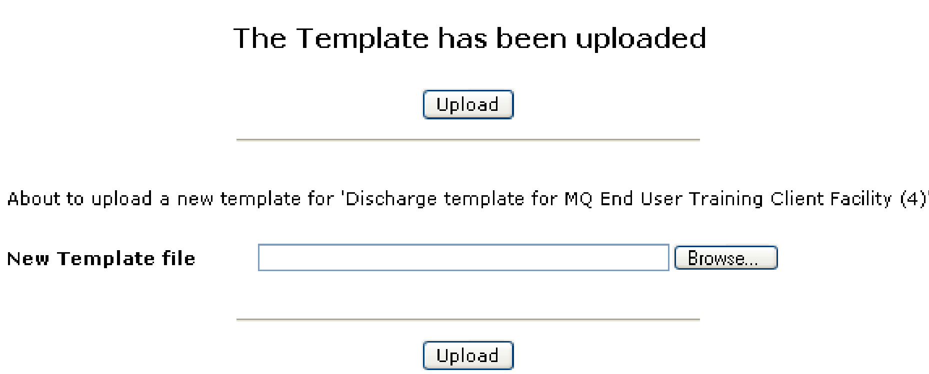
   ⇒ Enter the **New Template file** name in the text box.

   ⇒ Click **Browse** to locate template file. The Choose file dialog box displays:



   Select the file that you want to upload and click **Open**.

10. Click **Upload**. DocQmanage uploads the template, overwrites the existing template, and displays the following confirmation:



🔔 To upload additional templates, repeat steps 2–10.

Review the topic summary.

Topic Summary

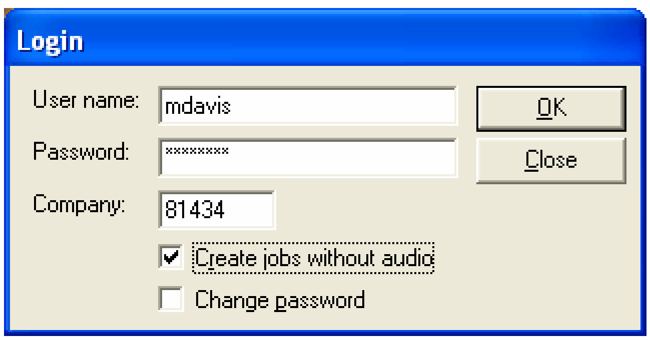
- To download a template, click **Setup** > **Templates** > **Search**, locate the template you want to download, and click **Download**.
- To create a copy of a file in Windows Explorer, right-click the file for which you want to create a back up, click **Copy,** right-click the folder that contains the original file, and click **Paste**.
- To upload a template, click **Setup** > **Templates** > **Search**, locate the template you want to upload, and click **Upload**.

Topic:
Testing Templates

After you upload a template, test the template to verify that it correctly formats documents. The first thing you must do to set up testing is to load a test job to which you can apply the template. To submit a test job, log in to DocQscribe and create a job without audio.

To test a template, follow the steps below:

1. Log in to DocQscribe. The Login dialog box displays:



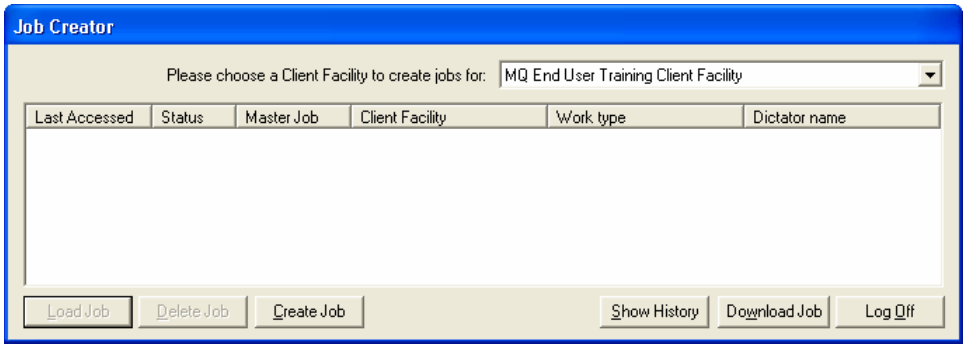
2. Enter your **User name** in the text box.

3. Enter your **Password** in the text box.

4. Enter your **Company** number in the text box.

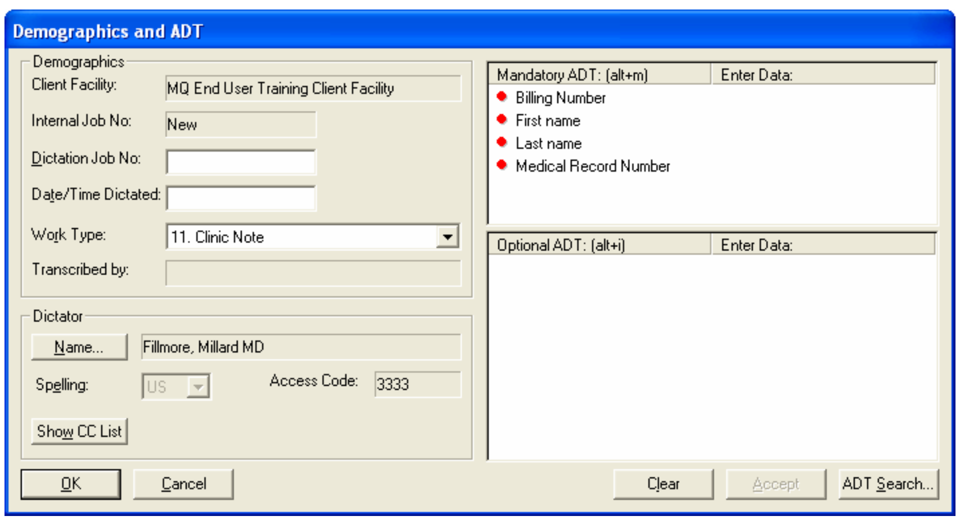
5. Select the **Create jobs without audio** check box.

6. Click **OK**. The Job Creator dialog box displays:



7. Select your facility in the **Please choose a Client Facility to create jobs for** drop-down list box.

8. Click **Create Job**. The Demographics and ADT dialog box displays:



On the right side of the dialog box, you can input **Mandatory ADT** information and **Optional ADT**, which allows you to insert referring physicians, middle name or initial, sex, etc.

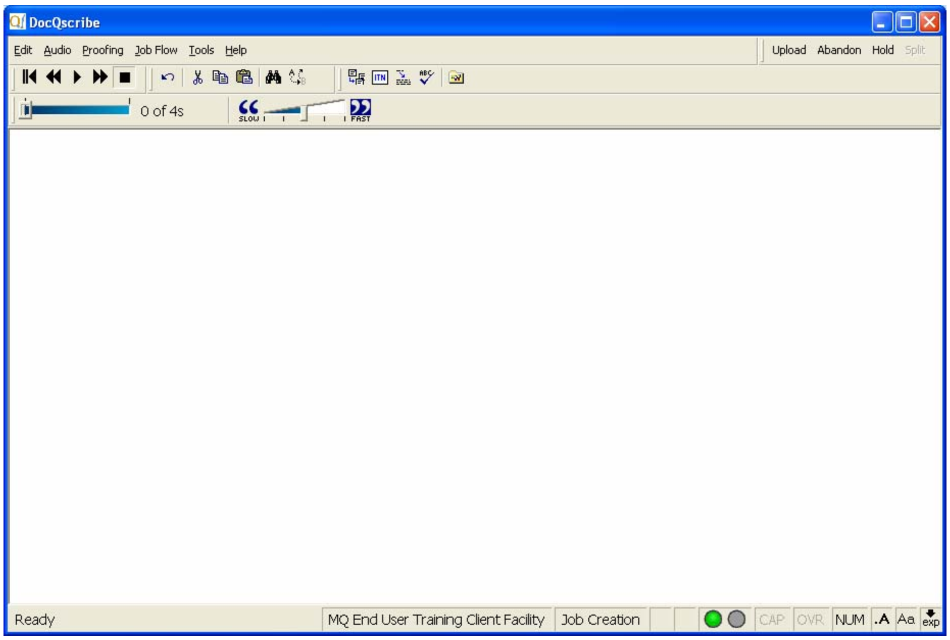
9. Enter a **Dictation Job No** in the text box.

Entering a job number and recording it on a separate sheet of paper helps you to easily find the test job in DocQmanage.

10. Select the template's **Work Type** in the drop-down list.

11. Enter any additional information you need to test the template.

12. Click **OK**. The DocQscribe window displays:



13. Enter the correct headings and other items that compose the template.

🔔 To insert a heading, press **Ctrl + H** to view a list of headings that you can enter.

🔔 Refer to a copy of your template to ensure you test all of the template's tags and fields.

Be sure to include all of the following in the test report:

- Paragraph headings, which will use the default format and text
- Headings, which may have specific formats or text other than default

- Lists
- Carbon copies:
    - One report with no cc
    - One report with cc's
    - One report where the cc is not a dictator, but has to be added to the list. (This is especially important when testing on new Live sites.)

Be sure to create at least one report that includes a second page to verify your second page formatting is correct.

If you are using a conditional statement, verify you have a test report which tests for each condition which might arise to verify the conditional statements are working correctly.

If your template contains tables, include test data that the template must format in a table to verify that the tables format text correctly.

When testing a table, include at least one report where the paragraph following the table does not have a heading.

For faster testing, save and use the DocQscribe user output of commonly used report types to cut and paste into test reports.

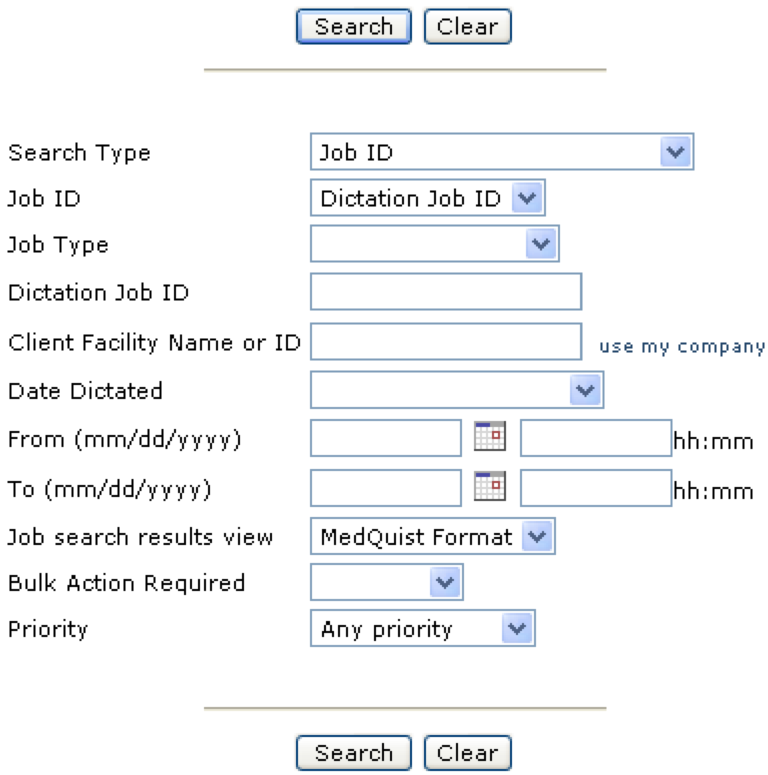
14. Click **Upload**. The job uploads to DEP for processing.

To check the results, you must log in to DocQmanage and view the job.

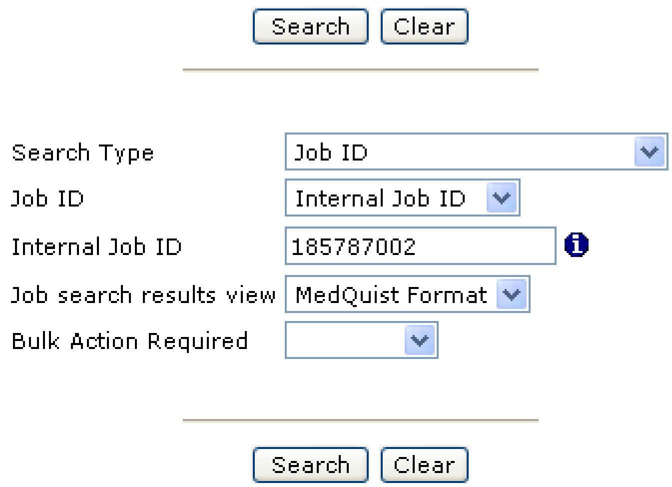
Before you view the job in DocQmanage, you can view the Internal Job ID number in DocQscribe by clicking the **Show History** button from the Job Creator dialog box. In addition to the job number, you can use the internal job number to find and view the test job in DocQmanage.

15. Log in to DocQmanage.

16. Click **Search.** The Job Search page displays:



17. Select **Internal Job Id** in the **Job ID** drop down list. The Job Search page displays:



18. Enter the **Internal Job ID** number in the text box.

19. Click **Search**. The search results display:

☠ If the report displays "Held by System," this indicates a problem with the template and you must do the following:

⇒ Immediately move the report to another status—either pause or finish the report. (Finishing the report is best.)

⇒ Open the template, find for the error, and correct it.

⇒ Reload the template, then go back to the report in DocQmanage and move the report to format.

⇒ Watch the report to be sure it does not receive a "Hold" status again.

20. Select **Final Report (RTF)** in the **Job Views** drop-down list box and click **Go**. The final report displays:

DATE: 05/01/2004	**NAME:** DOE, JOHN

BRIEF HISTORY AND PHYSICAL:
Patient has had a physical on 5/21/2003 with all vital signs normal. Patient is in excellent physical condition with respect to height, weight, blood pressure.

CHIEF COMPLAINT:
Abdominal gas and constipation.

IMPRESSION:
Mild gas pockets seen and partial bowel blockage. Recommend medication and return visit in two weeks.

John C Jones, MD

DD:	05/10/2004	Job:	48592301
DT:	05/12/2004	MT:	KD

21. Compare the template for this work type to the final report:

⇒ Check both headers and footers to be sure all information is filling in correctly and that the information is formatted correctly. Remember to check second page headers and footers.

⇒ Make sure the default paragraph style is working well.

⇒ Check to be sure any paragraphs that should have special formatting are formatting correctly.

⇒ Check to be sure lists are formatted correctly.

⇒ Check to be sure signature lines and cc blocks are formatting correctly.

⇒ Check to be sure any Conditional statements are working correctly.

☠ If the results do not match the template format, you must modify the template and retest.

Review the topic summary.

Topic Summary

- After you upload a template, test the template to verify that it correctly formats documents. The first thing you must do to set up testing is to load a test job to which you can apply the template.

- To submit test a template, log in to DocQscribe and create a job without audio and apply the template to that job.

Module Summary

Review module summary.

- To download a template, click **Setup > Templates > Search**, locate the template you want to download, and click **Download**.

- To create a copy of a file in Windows Explorer, right-click the file for which you want to create a back up, click **Copy,** right-click the folder that contains the original file, and click **Paste**.

- To upload a template, click **Setup > Templates > Search**, locate the template you want to upload, and click **Upload**.

- After you upload a template, test the template to verify that it correctly formats documents. The first thing you must do to set up testing is to load a test job to which you can apply the template.

- To submit test a template, log in to DocQscribe and create a job without audio and apply the template to that job.

Be sure to add a template to DocQmanage for each participant.

Give participants about 10–15 min. to complete these exercises and review the answers.

Performance and Application

Performing Your Skills

For the exercises in this section, use the personal template assigned to you.

To perform the skills introduced in this module, complete the following exercises:

1. Log in to DocQmanage and download your template and save it in your **Practice** folder (Page 102).

2. Create a copy of your template (Page 106).

3. Upload your template to the class DocQmanage site (Page 107).

4. Test your template to verify that it formats documents correctly (Page 113).

Applying Your Skills

To apply the skills covered in this module at a higher level, complete the following exercises:

1. A client wants to add a field to one of their templates currently in use. You download the template, add the field and are ready to upload it. What must you consider when downloading and uploading the template?

Performance and Application Answers

Performing Your Skills Answers

1. Log in to DocQmanage.
   Click **Setup > Templates > Search**.
   Click **Search.**
   Click **Download** next to **TD Test**.
   Click **Save**.
   Enter the name of your template in the **File name** text box.
   Click **Save**.

2. Start Windows Explorer.
   Open the **Practice** folder.
   Right-click your template and click **Copy**.
   Right-click the **Practice** folder and click **Paste**.

3. Log in to DocQmanage.
   Click **Setup > Templates > Add**.
   Select the template that you want to add in the **Available** list box and click **Move selected item**.
   Click **Add Template**.
   Click **Setup > Templates > Search**.
   Click **Search.**
   Click **Upload** next to your template.
   Click **Upload**.
   Click **Browse**.
   Navigate to the **Practice** folder.
   Select your template and click **Open**.
   Click **Upload**.

4. Log in to DocQscribe.
   Select the **Create jobs without audio** check box.
   Click **OK**.
   Select the test facility in the **Please choose a Client Facility to create jobs for** drop-down list box.
   Click **Create Job**.
   Select the template's **Work Type** in the drop-down list.
   Click **OK**.
   Enter the sample dictation.

Click **Upload**.
Log in to DocQmanage.
Click **Search.**
Select **Internal Job Id** in the **Job ID** drop down list.
Enter the **Internal Job ID** number in the text box.
Click **Search**.
Select **Final Report (RTF)** in the **Job Views** drop-down list box and click **Go**.
Compare the template for this work type to the final report.

Applying Your Skills Answers

1. When downloading and modifying a template, you must make a backup copy of the original template. It is suggested that you use version numbers in file naming conventions. This helps you track changes to verify which modifications work best and prevents you from overwriting an existing template. Before uploading a template, it is always a good idea to test the template to verify that it correctly formats documents. You must also ensure that all DocQscribe users are logged off. If DocQscribe users are still logged in, they could have a work type that is associated with the template you are modifying. You must avoid this conflict as it could cause billing problems.

Module 4:
Reading XML and Troubleshooting Templates

Review module description and performance objectives.

Module Description

This module covers reading XML files and troubleshooting templates.

Module Performance Objectives

After completing this module, you will be able to:

- read XML files.
- view XML files.
- troubleshoot templates.

Module Prerequisites

To understand the concepts and perform the tasks in this module, you should know how to:

- use Microsoft Word.
- demonstrate a working knowledge of DEP.

Topic:

Reading XML Files

DEP uses XML files to accomplish transcription, delivery, and formatting of reports. The transcription process generates data into the XML document, along with information that is retrieved from the database. The information in the XML file is then pulled into a Microsoft Word template for formatting, delivery, and distribution. To fully understand the process and the data, the XML file is a very important starting point.

Contents of the XML File

The information in the XML file can be divided into four categories based on the origin and purpose of the data. The data can be:

- generated from the ADT feed from the client.
- entered by the transcriptionist on the DocQscribe Demographics and ADT dialog box.
- transcribed in the report.
- included from the dictation and transcription job information.

✐ The XML file displays all of the information related to the origin and purpose of the file.

The ADT Data

When a client delivers an ADT that is processed as HL7, the file is parsed by the HL7 Parser, and selected data is stored in the DEP database. This information is available to the transcription process, and the transcribed report. When the data record is selected through the search process, it is imported into the XML file to be used in the report, in the distribution process for the report, or later in creating an HL7 result for the client.

By selecting certain fields in the HL7 Parser definition, the data that appears in the XML file can be affected. It is important to note that any information required to be in the XML file should be added as an ADT field. The data will then be available in the XML file and as an entry on the DocQscribe Demographics and ADT dialog box.

The DocQscribe Demographics and ADT Dialog Box

The DocQscribe Demographics and ADT dialog box is the DocQscribe tool that allows the transcriptionist to enter or verify demographic data about the patient, visit, or report. This is the tool that controls searching on patient data, and associating the report and the selected data together. The information selected or entered in this screen will also be included in the XML file.

The transcriptionist enters information in the DocQscribe Demographics and ADT dialog box, selects records from the database query to populate other information on the screen, then proceeds to transcribe the dictated report. Once the transcription is completed and saved, most of the XML file is completed. The XML file is then parsed into a Microsoft Word template, by using the bookmarks placed in the template, to create the final document that appears the way the client wants it to.

Any remaining job information for any DocQmanage action is added as well.

Dictation / Transcription Job Information

When a job is created in DocQmanage, tags are created in the system for the job. These tags include information such as the date and time dictated.

Defining XML Tags

XML uses "tags" to delineate information, and allow applications to determine where that particular piece of data begins and ends. It is important to understand the fundamentals of XML tags and understand how DEP uses the tags in the XML file. There will never be a need to create or modify these files manually, but since what appears on a final report comes from the XML file, it may be greatly beneficial to troubleshoot transcribed reports and templates by looking at the XML file. To do this successfully, you will need to understand the data, the tags, and what information will be included there.

First, it helps to visualize an XML file as groups or sections of information, which can be parsed by other applications into templates or layouts, to present information in a desired manner. Sections often contain sections within them, as a way of further breaking down larger pieces of information. Typically, XML file sections will be indented, to help human readers visualize how the sections relate to each other.

Using a text editor, such as WordPad for Windows, an XML file will appear cryptic. It is a simple structure, though. Each piece of data is surrounded by tags, and tags are surrounded by characters to indicate the tag. Each piece of data will have an open and a close tag, to indicate a start and finish of that data.

For example, to tag "Using Data in DEP" as a title, an XML file would have an entry similar to the following:

```
<Title>Using Data in DEP</Title>
```

The "<>" symbols isolate the name of the tag, such as the first tag "<Title>." This tag is followed by the data it is identifying, "Using Data in DEP." The data is then followed by the close tag, used to indicate to reading applications that the end of the data element has been reached, and designated as a close tag by the "/". Using the example above, an application reading the XML file knows that "Using Data in DEP" should be known as "title" information, and that there is no other information that should be included as the title.

To display and discuss XML tags, log in to DocQmanage and open a the XML file view of a report.

Leave the XML file open to view the document subsections discussed on the following pages.

The first tag found in an XML document is the only one that does not comply to these rules. The purpose of this tag is to identify the file type to applications reading it. It does not require a close tag, and the data of the tag is included between the <> symbols. An example would be as follows:

```
<? xml version="1.0"
encoding="Windows-1252" ?>
```

In the DEP XML files, this will always be the first line of the file. From there, an open tag for Sections will be found, indicating that subsections will follow. The next tag will be a SECTION tag (all subsections are designated in uppercase in the DEP XML file). The SECTION tag also contains a qualifier, of "compulsory=". This will always be equal to a 1 or 0, stating whether or not the SECTION is mandatory or optional data.

An example of the first three components on an XML file would be as follows:

```
<?xml version="1.0" encoding="Windows-1252" ?>

 <Sections>


 <SECTION compulsory="1">
 <TITLE><![CDATA[CHIEF COMPLAINT]]></TITLE>
 <BODY><![CDATA[Chest Pain.]]></BODY>
 <FROM><![CDATA[Transcribed Text]]></FROM>
 </SECTION>
```

The first component of the XML file is the version and encoding statement, then the sections open tag, then the first section of data, with the Chief Complaint title. The CDATA marker is placed before the actual data or value of the respective tag, and the data is enclosed by brackets. The title of the data element, in this case, would match with a bookmark name in the Word template, indicating that the body text should be placed into the "Chief Complaint" section of the final report. The brackets differentiate between text of the field and CDATA.

Each DEP XML report will contain many of these subsections, each with the same four elements. The meaning of the elements is described here:

- SECTION – This is the open tag, and states the compulsory status of the subsection.

- TITLE – The title will be used to identify the data element, as a template bookmark, database field, or ADT segment field.

✐ For entries resulting from components in the client's ADT definition, the section title will begin with "HL7", then the component name. For example, the HL7 field for Patient First Name will appear as "HL7 Patient First Name."

- BODY – The body element contains the actual data for the subsection. This could be transcribed text, data pulled from a database table, or DocQscribe Demographics and ADT dialog box.

- FROM – This element indicates where the Body data is derived from, including the locations mentioned above. If the data is from transcribed text, it is indicated in the "From" tag. A standard database field appears as "DBQuery".

- Any section that has a "From" value beginning with the letters "HL7" represents a single item of ADT information associated with the job. The "From" value will contain the HL7 segment name, the field index, and the component index. For example, a section from HL7 PID.5.1 would contain the patient's surname (specified location in HL7 Standards).

The subsections that will be included include default sections, such as those included for the transcribed body of a report, and will include any ADT fields identified in the ADT Definition generated by the HL7 Parser configuration.

- Legacy fields that have been defined appear in the XML file as ADT Fields, for backwards compatibility. The entry will be "duplicated," with the ADT component name and the legacy system section title. There are 19 defined legacy fields.

- The legacy system fields are hard-coded, but the new system is flexible. The XML file contains both sets of fields for full compatibility.

The following XML file was created by DEP:

```
  <?xml version="1.0" encoding="Windows-1252" ?>
- <Sections>
  - <SECTION compulsory="1">
    - <TITLE>
        <![CDATA[ CHIEF COMPLAINT  ]]>
      </TITLE>
    - <BODY>
        <![CDATA[ This is a test of a chief complaint. They just compla
      </BODY>
    - <FROM>
        <![CDATA[ Transcribed Text  ]]>
      </FROM>
    </SECTION>
```

At the very top of the file is a section called the "Prolog." The minimal prolog contains a declaration that identifies the document as an XML document, like this:

```
<?xml version="1.0"?>
```

The declaration may also contain additional information, like this:

```
<?xml version="1.0" encoding="ISO-
8859-1" standalone="yes"?>
```

The XML declaration is essentially the same as the HTML header, <html>, except that it uses <?..?> and it may contain the following attributes:

Attribute	Description
Version	Identifies the version of the XML markup language used in the data. This attribute is not optional.
Encoding	Identifies the character set used to encode the data. "ISO-8859-1" is "Latin-1" the Western European and English language character set. (The default is compressed Unicode: UTF-8.)
Standalone	Tells whether or not this document references an external entity or an external data type specification (see below). If there are no external references, then "yes" is appropriate.

After the Prolog, is the area with the first tag, which in this case is <Sections>, after <Sections>, you see a <Section> element. You will notice there are multiple <Section> elements in this XML document.

Each <Section> element will encapsulate a piece of data. Each <Section> will contain three sub-elements called <Title>, <Body>, and <From>.

The <Title> element will contain the field information. (This might be a "heading" field, or a field directly from the DEP database.)

The <Body> element will contain the actual data associated with the field and the <From> element will indicate where the data has come from.

In the example, the first <Section> tag also contains an attribute called “Compulsory.” If this attribute is set to “1”, this indicates that the data in this section was imported from the DQS user's transcribed text. If this attribute was a “0,” that would indicate the data had been imported, or populated, by the database, or ADT, or some other “computed process,” such as a billing count process, etc…

Since this is a “1,” the data in this section came from the DQS user output. The <Title> element indicates the Heading, the <Body> element contains the text associated with the Heading listed in the <Title>, and the <From> element displays “Transcribed Text,” which again indicates this came from the DQS user output.

Each element in the section has an opening and closing tag, and the tags are nested properly; <Section>, <Title>, </Title>, <Body>, </Body>, <From>, </From>, </Section>. Each and every section will look the same, all the way to the bottom of the document where you will find the </Sections> tag, which closes or document.

Notice the <HL7 Medical Record Number> section in the following example:

```
- <SECTION compulsory="0" required="1">
  - <TITLE>
      <![CDATA[ HL7 Medical Record Number ]]>
    </TITLE>
  - <BODY>
      <![CDATA[ 636636  ]]>
    </BODY>
  - <FROM>
      <![CDATA[ HL7: PID.3.1  ]]>
    </FROM>
  </SECTION>
```

HL7 Medical Record Number

This is a database field populated by the DEP system. This field was created in the database for this client, via DocQmanage, ADT Definitions. The <Body> contains the MRN as stored in the database for this document. The <From> element shows that this data was found in the HL7 messages at PID 3. 1, because that is what was configured in the ADT Definitions. The Required attribute tells you this field was set as “required” in the ADT Definition.

There are many default fields in the XML document. XML documents from different clients will not necessarily look exactly the same, but they will be similar. Also, if the document included a CC list, the section called <CC_XML> contains a sub-element called <CC Item> for each CC recipient included in the list:

CC XML

```
- <SECTION compulsory="0">
  - <TITLE>
      <![CDATA[ CC_XML  ]]>
    </TITLE>
  - <BODY>
    - <CC_XML>
      - <CCItem>
          <Distribution type="PRINT">N</Distribution>
          <Distribution type="FAX">Y</Distribution>
          <Distribution type="EMAIL">N</Distribution>
        - <SMID>
            <![CDATA[ 2116946  ]]>
          </SMID>
        - <PUID>
            <![CDATA[ 4565  ]]>
          </PUID>
        - <Name>
            <![CDATA[   ]]>
          </Name>
        - <Fax>
            <![CDATA[ 770-555-1212  ]]>
          </Fax>
        - <Email>
            <![CDATA[   ]]>
          </Email>
```

The <Distribution type> elements indicates the settings of the three check boxes in the dictator’s profile.

The <SMID> shows the internal system ID assigned to this dictator by the system when they were created.

The <PUID> is the user's access code as input when the dictation was created.

<DisplayName> display the dictator's name concatenated with any suffix, prefix and credentials setup in the user's profile.

```
- <DisplayName>
    <![CDATA[ Dr. Barney Rubble, PHD  ]]>
  </DisplayName>
```

In summary, the XML document contains all the pertinent document demographics as well as the transcribed text for its associated RTF document.

Topic Summary

Review the topic summary.

- DEP relies on an XML file to accomplish transcription, delivery, and formatting of reports.
- The information in the XML file can be divided into four categories based on the origin and purpose of the data. The data can be:
  - generated from the ADT feed from the client,
  - entered by the transcriptionist on the DocQscribe Demographics and ADT dialog box,
  - transcribed in the report, or
  - included from the dictation and transcription job information.
- By selecting certain fields in the HL7 Parser definition, the data that appears in the XML file can be affected. It is important to note that any information required to be in the XML file should be added as an ADT field.

- The DocQscribe Demographics and ADT dialog box is the DocQscribe tool that allows the transcriptionist to enter or verify demographic data about the patient, visit, or report. The information selected or typed in this screen will also be included in the XML file.

- XML uses "tags" to delineate information, and allow applications to determine where that particular piece of data begins and ends.

- Each piece of data will have an open and a close tag, to indicate a start and finish of that data.

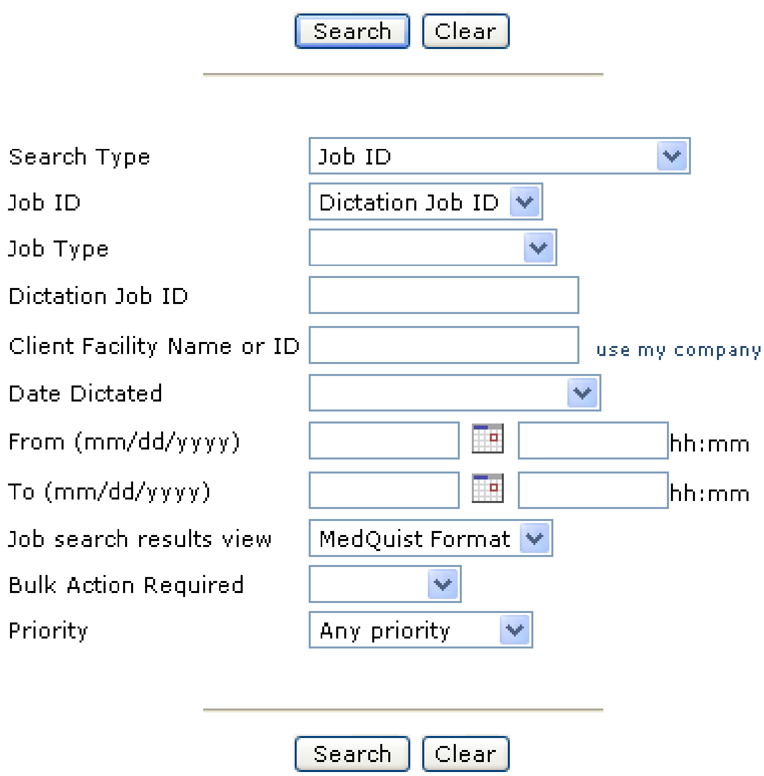
Topic:
Viewing XML Files and Troubleshooting Templates

When troubleshooting template formatting issues, view the XML file of a report. You can view the XML file to ensure all of the report elements are included as well as formatted correctly.

To view an XML file, follow the steps below:

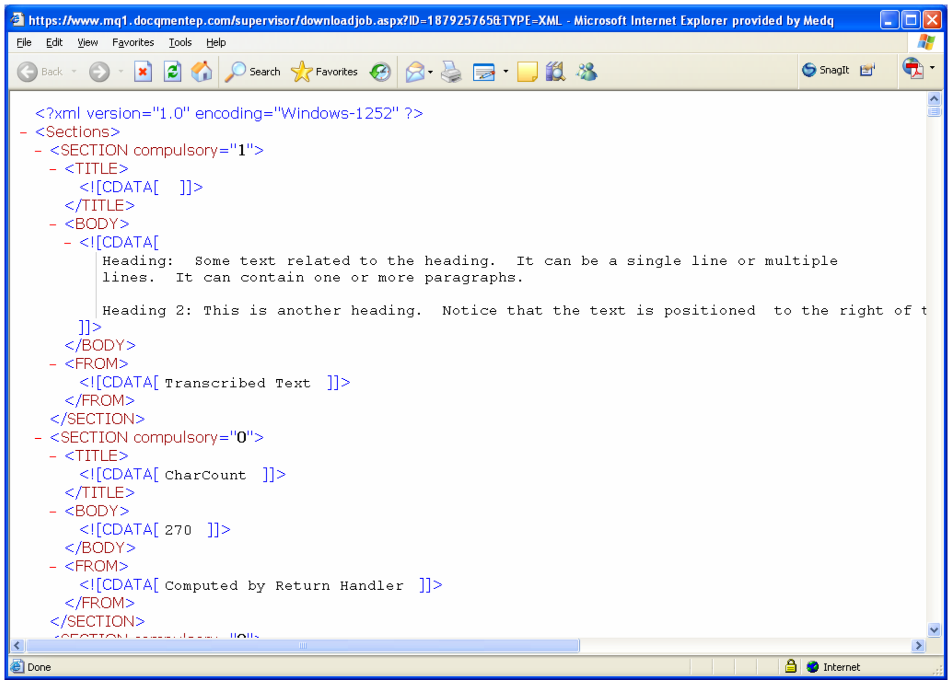
1. Log in to DocQmanage.

2. Click **Search.** The Job Search page displays:



3. Locate the report for which you want to view the XML file.

4. Select **XML File** in the **Job Views** drop-down list box and click **Go**. The XML report displays:



5. When you finish, you can close the window and return to DocQmanage.

Troubleshooting Templates

Because improper syntax, such as missing carets or slashes, can cause numerous problems, always use the DEP Template Assistant tool to check syntax in the template before testing and troubleshooting it.

The following table contains common report issues and the procedures for troubleshooting them:

Issue	Troubleshooting Procedure
Incorrect Insertion Point tags **For example, <HL7AttendingDoctor/> in the template when the correct tag is <UserSigName/>. Another common error is the use of <CCNames/> versus <CCList/>.**	Open the template and verify that it contains all Insertion Point tags.
Missing tags—data does not show up in the final report, such as doctors' cc's, because the tag <ccnames> is not in the template	Open the template and verify that it contains all required tags.
Misspelled words	Open the template and verify that all words are spelled correctly.
Margins cut off words after the report uploads into the client's interface system	Open the template and verify that all margins are within the printable range of the client's interface system that prints reports.
Missing punctuation **For example, reports display with missing quotes, commas, slashes, or brackets.**	Open the template and verify that it contains all necessary punctuation.

Issue	Troubleshooting Procedure
Missing or improperly placed/formatted mandatory and/or patient information	Open the template and verify that all mandatory and/or patient information that is not part of the header or footer is outside of the <SM-OPTIONAL>> tags.
Conditional If statements do not work	Open the template and verify that the conditional/nested If statements meet all criteria to insert information, such as opening quotes have closing quotes or opening bracket has a closing bracket.
Switches, such as uppercase, bold, caps, underline, only apply to specific sections and not the entire report	Open the template and verify that it contains the correct switches placed at all sections to which they apply.
Tags do not work	Open the template and verify that all tags have an opening and a closing tag. For example, ,<SM-OPTIONAL> has its corresponding </SM-OPTIONAL> closing tag and <DEFAULT> has the </DEFAULT> closing tag.

Review the topic summary.

Topic Summary

- When troubleshooting template formatting issues, you can view the XML file of a report.
- To view an XML file, log in to DocQmanage, locate the report for which you want to view the XML file, select **XML File** in the **Job Views** drop-down list box, and click **Go**.
- Always use the DEP Template Assistant tool to check syntax in the template before testing and troubleshooting it.

Module Summary

Review module summary.

- DEP relies on an XML file to accomplish transcription, delivery, and formatting of reports.
- The information in the XML file can be divided into four categories based on the origin and purpose of the data. The data can be:
  - generated from the ADT feed from the client,
  - entered by the transcriptionist on the DocQscribe Demographics and ADT dialog box,
  - transcribed in the report, or
  - included from the dictation and transcription job information.
- By selecting certain fields in the HL7 Parser definition, the data that appears in the XML file can be affected. It is important to note that any information required to be in the XML file should be added as an ADT field.
- The DocQscribe Demographics and ADT dialog box is the DocQscribe tool that allows the transcriptionist to enter or verify demographic data about the patient, visit, or report. The information selected or typed in this screen will also be included in the XML file.
- XML uses "tags" to delineate information, and allow applications to determine where that particular piece of data begins and ends.
- Each piece of data will have an open and a close tag, to indicate a start and finish of that data.
- When troubleshooting template formatting issues, you can view the XML file of a report.

- To view an XML file, log in to DocQmanage, locate the report for which you want to view the XML file, select **XML File** in the **Job Views** drop-down list box, and click **Go**.

- Always use the DEP Template Assistant tool to check syntax in the template before testing and troubleshooting it.

Performance and Application

Performing Your Skills

To perform the skills introduced in this module, complete the following exercises:

1. View the XML file of the report you created from your test template (Page 137).

Give participants about 10–15 min. to complete these exercises and review the answers.

Applying Your Skills

To apply the skills covered in this module at a higher level, complete the following exercises:

1. A client reports the following issues regarding their reports:

   - Not all headings are bold
   - Misspelled headings
   - Missing mandatory information

What can you verify in the template to troubleshoot these issues ?

Performance and Application Answers

Performing Your Skills Answers

1. Log in to DocQmanage.
   Click **Search.**
   Locate your test report file.
   Select **XML File** in the **Job Views** drop-down list box and click **Go**.

Applying Your Skills Answers

1. To verify that the template is the source of the template issues, verify the following:

   - All heading tags have a bold switch with correct syntax
   - All spelling has been checked
   - All mandatory and/or patient information that is not part of the header or footer is outside of the <SM-OPTIONAL>> tags
   - All syntax has been checked

Appendix A:
Insertion Point Tags

The following table describes some common insertion point tags:

Tags beginning with "User" refer to the dictator (document author). Tags beginning with "ADT" and "HL7" refer to the patient.

Insertion Point Tag	Source	Description
<AccessCode/>	Database query	Dictator's Access Code
<ADTAge/>	Computed by Return Handler	Age (based upon date of birth)
<ADTFullName/>	Computed by Return Handler	LastName, FirstName
<AUDIOSECS/>	Database query	Length of audio file associated with the job in seconds
<CCCount/>	Computed by Return Handler	Total # of cc's
<CCList/>	Computed by Return Handler	Includes fax, address, etc., with blank line between entries
<CCNames/>	Computed by Return Handler	Each name is on a line with no blank lines between entries (does not include fax, address, etc.)
<CCNamesACs/>	Computed by Return Handler	CC signature name with access number

Insertion Point Tag	Source	Description
<CcsAccessCode/>	Computed by Return Handler	Space delimited access codes of cc recipients
<CcsAccessCodeCount/>	Computed by Return Handler	# of cc's for cc recipients who have access codes
<CcsNoAccessCode/>	Computed by Return Handler	Lists names of cc recipients without access codes
<CcsNoAccessCodeCount/>	Computed by Return Handler	# of cc's for cc recipients who do not have access codes
<CharCount/>	Computed by Return Handler	DQS Output Character Count without spaces
<ClientAccountNumber/>	Database query	Contract>Contract Number
<ClientIdentifier/>	Database query	Contract>Contract code>JDE#
<ClientReportCode/>	Database query	Work Type>General>Work Type Client Code (a.k.a. WT mnemonic)
<DateDictated/>	Database query	Date of dictation (formatted per local settings for Client Facility unless otherwise specified)
<DateFormat/>	Database query	Local date format
<DateSubmitted/>	Computed by Return Handler	
<DateTimeDictated/>	Database query	Date and time of dictation (formatted per local settings for Client Facility unless otherwise specified)

Insertion Point Tag	Source	Description
<DateTimeSubmitted/>	Computed by Return Handler	
<DateTimeTranscribed/>	Database query	Date and Time of transcription (formatted per local settings for Client Facility unless otherwise specified)
<DateTranscribed/>	Database query	Date of transcription (formatted per local settings for client facility unless otherwise specified)
<FreeCCCount/>	Computed by Return Handler	Same as <CcsNoAccessCode/>
<FreeCCs/>	Computed by Return Handler	Same as <CcsNoAccessCodeCount/>
<HL7AdmitDate/>	ADT Feed	Admit Date
<HL7AdmittingCredentials/>	ADT Feed	Admitting Physician Credentials
<HL7AdmittingDoctor/>	ADT Feed	Admitting Doctor Access Code
<HL7AdmittingFirstName/>	ADT Feed	Admitting Physician First Name
<HL7AdmittingLastName/>	ADT Feed	Admitting Physician Last Name
<HL7AdmittingMiddle/>	ADT Feed	Admitting Physician Middle Initial

Insertion Point Tag	Source	Description
<HL7AdmittingSig/>	Computed by Return Handler	Admitting Physician FirstName Initial, LastName, Suffix, Credentials
<HL7AttendingCredentials/>	ADT Feed	Attending Physician Credentials
<HL7AttendingDoctor/>	ADT Feed	Attending Physician Access Code
<HL7AttendingFirstName/>	ADT Feed	Attending Physician First Name
<HL7AttendingInitials/>	Computed by Return Handler	Attending Physician Initials
<HL7AttendingLastName/>	ADT Feed	Attending Physician Last Name
<HL7AttendingMiddle/>	ADT Feed	Attending Physician Middle … Name or Initial
<HL7AttendingSig/>	Computed by Return Handler	Attending Physician FirstName Initial, LastName, Suffix, Credentials
<HL7Bed/>	ADT Feed	Bed Number
<HL7BillingNumber/>	ADT Feed	Billing #
<HL7ConsultingCredentials/>	ADT Feed	Consulting Physician Credentials
<HL7ConsultingDoctor/>	ADT Feed	Consulting Physician access code
<HL7ConsultingFirstName/>	ADT Feed	Consulting Physician First Name

Insertion Point Tag	Source	Description
<HL7ConsultingInitials/>	Computed by Return Handler	Consulting Physician Initials
<HL7ConsultingLastName/>	ADT Feed	Consulting Physician Last Name
<HL7ConsultingMiddle/>	ADT Feed	Consulting Physician Middle … Name or Initial
<HL7ConsultingSig/>	Computed by Return Handler	Consulting Physician FirstName Initial, LastName, Suffix, Credentials
<HL7DateOfBirth/>	ADT Feed	Date of Birth
<HL7DateOfService/>		Date of Service
<HL7DischargeDate/>	ADT Feed	Discharge Date
<HL7FacilityID/>	ADT Feed	Facility ID
<HL7FirstName/>	ADT Feed	Patient First Name
<HL7Height/>	ADT Feed	Patient's Height
<HL7LastName/>	ADT Feed	Patient Last Name
<HL7MedicalRecordNumber/>	ADT Feed	Medical Record #
<HL7 Middlenameorinitial/>	ADT Feed	Middle Name or Initial
<HL7PatientID/>	ADT Feed	Patient ID
<HL7PatientType/>	ADT Feed	Defined by facility, eg: Inpatient, Outpatient
<HL7ReferringCredentials/>	ADT Feed	Referring Physician Credentials

Insertion Point Tag	Source	Description
<HL7ReferringDoctor/>	ADT Feed	Referring Physician Access Code
<HL7ReferringFirstName/>	ADT Feed	Referring Physician First Name
<HL7ReferringLastName/>	ADT Feed	Referring Physician Last Name
<HL7ReferringMiddle/>	ADT Feed	Referring Physician Middle … Name or Initial
<HL7ReferringSig/>	Computed by Return Handler	Referring Physician FirstName Initial, LastName, Suffix, Credentials
<HL7Room/>		Room Number
<HL7Service Code/>	ADT Feed	Service
<HL7Sex/>	ADT Feed	Sex (Male/Female)
<HL7SSN/>	ADT Feed	Social Security Number
<HL7Station/>	ADT Feed	Station
<HL7Weight/>	ADT Feed	Patient's Weight
<JobDemographics/>	Database query	Job Demographics
<JobID/>	Database query	Internal Job# - assigned by DN4
<JobSTAT/>	Database query	Blank for normal priority, U for STAT
<JobType/>		

Insertion Point Tag	Source	Description
<MTID/>	Database query	Database ID for DocQscribe User who transcribed the report
<MTInitials/>	Database query	Initials of DocQscribe User who transcribed the report
<MTLogon/>	Database query	Username of DocQscribe User that first transcribed the report
<MTSOID/>	Database query	Service center location code associated with the WCU that first transcribed the report
<OrgID/>	Database query	Company Location Code
<OrgName/>	Database query	Not on list in Test Site
<OrigClientReportCode/>	Database query	
<OriginalJobNo/>	Database query	Dictation Job ID – ID# given to dictator
<OrigReportName/>	Database query	
<OrigWorkType/>	Database query	
<Pagination/>	Database query	On/Off
<ParentJobID/>		Job ID of the first job in a voice file that contained more than one job.
<PrintFlag/>	New	Whether or not the job gets printed
<PUIDCCs/>	Computed by Return Handler	Same as <CcsAccessCode/>

Insertion Point Tag	Source	Description
<ReportID/>	New	
<ReportName/>	Database query	Work Type>General>Work Type Name
<RequiredFormatRTFRevision/>	Database query	
<SMIDCCs/>	Computed by Return Handler	Database IDs for CCs with Access Codes
<SMIDCount/>	Computed by Return Handler	Same as <CcsAccessCodeCount/>
<TemplateFilename/>	Database query	Template file name
<TemplateID/>	Database query	Database Template ID
<TemplateModified/>	Database query	
<TimeFormat/>	Database query	Company>Formats>Time Format
<TimeZone/>	Database query	DB = EST/EDT, default is DB unless otherwise specified
<TranscriptionDuration/>	Datebase query	Length of time it took to transcribe file
<UserAccountID/>	Database query	
<UserAddress/>	Database query	Dictator>Contact Info>Address
<UserCredentials/>	Database query	Dictator>Details>Credentials
<UserEmail/>	Database query	Dictator>Contact Info>Email
<UserFax/>	Database query	Dictator>Contact Info>Fax

Insertion Point Tag	Source	Description
<UserForeName/>	Database query	Dictator>Details>First Name
<UserGroupDepartments/>	Database query	Dictator>Details>Department
<UserGroupSpecialties/>	Database query	Dictator>Details>Specialties
<UserID/>	Database query	Database ID for Dictator
<UserInitial/>	Database query	Dictator>Details>Middle Name
<UserInitials/>	Computed by Return Handler	Dictator Initials
<UserMnemonic/>	Database query	Dictator>Details>Mnemonic
<UserPhone/>	Database query	Dictator>Contact Info>Telephone
<UserSigBlock/>	Database query	Dictator>Details>Additional Signature Information
<UserSigName/>	Computed by Return Handler	ForeName Initial SurName, Suffix, Credentials
<UserSuffix/>	Database query	Dictator>Details>Suffix
<UserSurName/>	Database query	(e.g. Jr., Sr., or III)
<UserTitle/>	Database query	Dictator>Details>Last Name
<WorkType/>	Database query	Dictator>Details>Prefix
<WorktypeDepartmentMnemonic/>	Database query	(e.g. Mr., Mrs., Ms.)

Appendix B:
Preferred Use Tags

The following table describes preferred use tags:

Tags beginning with “User” refer to the dictator (document author). Tags beginning with "ADT" and "HL7" refer to the patient.

Insertion Point Tag	Description
<ADTFullName/>	Use this except when name needs to be mixed case - then First Name, Last Name tags
<CCList/>	Use this for creating CC lists that display blank lines between cc recipients. Do not use this for creating CC lists unless client specifically requests no blank lines between cc recipients and that address, fax, etc. will never be used.
<DateTimeDictated/>	Use this unless client says they do not want time included
<DateTimeTranscribed/>	Use this unless client says they do not want time included
<HL7AdmittingSig/>	Use this unless Physicians name is in other than FirstName LastName order
<HL7AttendingSig/>	Use this unless Physicians name is in other than FirstName LastName order
<HL7ConsultingSig/>	Use this unless Physicians name is in other than FirstName LastName order
<HL7DateOfService/>	

Insertion Point Tag	Description
<HL7ReferringSig/>	Use this unless Physicians name is in other than FirstName LastName order
<MTID/>	Use ID unless client specifically requests initials
<OriginalJobNo/>	Use unless client requests internal job number
<HL7PatientID/>	
<HL7VisitID/>	
<UserSigName/>	Use this unless Physicians name is in other than FirstName LastName order

Appendix C:
Frequently Used Tags

The following table describes frequently used tags:

Tags beginning with "User" refer to the dictator (document author). Tags beginning with "ADT" and "HL7" refer to the patient.

Insertion Point Tag	Source	Description
<ADTAge/>	Computed by Return Handler	Age (based upon date of birth)
<ADTFullName/>	Computed by Return Handler	LastName, FirstName
<HL7PatientID/>	ADT Feed	Patient ID
<ADTVisitID/>	ADT Feed	Visit ID
<CCCount/>	Computed by Return Handler	Total # of cc's
<CCList/>	Computed by Return Handler	Includes fax, address, etc., with blank line between entries
<CCNames/>	Computed by Return Handler	Each name is on a line with no blank lines between entries (does not include fax, address, etc.)
<CCNamesACs/>	Computed by Return Handler	CC signature name with access number

Insertion Point Tag	Source	Description
<DateDictated/>	Database query	Date of dictation (formatted per local settings for Client Facility unless otherwise specified)
<DateTimeDictated/>	Database query	Date and time of dictation (formatted per local settings for Client Facility unless otherwise specified)
<DateTimeTranscribed/>	Database query	Date and Time of transcription (formatted per local settings for Client Facility unless otherwise specified)
<DateTranscribed/>	Database query	Date of transcription (formatted per local settings for client facility unless otherwise specified)
<HL7AdmitDate/>	ADT Feed	Admit Date
<HL7AdmittingDoctor/>	ADT Feed	Admitting Doctor Access Code
<HL7AdmittingFirstName/>	ADT Feed	Admitting Physician First Name
<HL7AdmittingLastName/>	ADT Feed	Admitting Physician Last Name
<HL7AdmittingMiddle/>	ADT Feed	Admitting Physician Middle Initial
<HL7AdmittingSig/>	Computed by Return Handler	Admitting Physician FirstName Initial, LastName, Suffix, Credentials

Insertion Point Tag	Source	Description
<HL7AttendingCredentials/>	ADT Feed	Attending Physician Credentials
<HL7AttendingDoctor/>	ADT Feed	Attending Physician Access Code
<HL7AttendingFirstName/>	ADT Feed	Attending Physician First Name
<HL7AttendingInitials/>	Computed by Return Handler	Attending Physician Initials
<HL7AttendingLastName/>	ADT Feed	Attending Physician Last Name
<HL7AttendingMiddle/>	ADT Feed	
<HL7AttendingSig/>	Computed by Return Handler	Attending Physician FirstName Initial, LastName, Suffix, Credentials
<HL7Bed/>	ADT Feed	Bed Number
<HL7BillingNumber/>	ADT Feed	Billing #
<HL7ConsultingCredentials/>	ADT Feed	Consulting Physician Credentials
<HL7ConsultingDoctor/>	ADT Feed	Consulting Physician access code
<HL7ConsultingFirstName/>	ADT Feed	Consulting Physician First Name
<HL7ConsultingInitials/>	Computed by Return Handler	Consulting Physician Initials
<HL7ConsultingLastName/>	ADT Feed	Consulting Physician Last Name

Insertion Point Tag	Source	Description
<HL7ConsultingMiddle/>	ADT Feed	Consulting Physician Middle … Name or Initial
<HL7ConsultingSig/>	Computed by Return Handler	Consulting Physician FirstName Initial, LastName, Suffix, Credentials
<HL7DateOfBirth/>	ADT Feed	Date of Birth
<HL7DateOfService/>		Date of Service
<HL7DischargeDate/>	ADT Feed	Discharge Date
<HL7FacilityID/>	ADT Feed	Facility ID
<HL7FirstName/>	ADT Feed	Patient First Name
<HL7Height/>	ADT Feed	Patient's height
<HL7LastName/>	ADT Feed	Patient Last Name
<HL7MedicalRecordNumber/>	ADT Feed	Medical Record #
<HL7PatientType/>	ADT Feed	Defined by facility, eg: Inpatient, Outpatient
<HL7ReferringCredentials/>	ADT Feed	Referring Physician Credentials
<HL7ReferringDoctor/>	ADT Feed	Referring Physician access code
<HL7ReferringFirstName/>	ADT Feed	Referring Physician First Name
<HL7ReferringLastName/>	ADT Feed	Referring Physician Last Name

Insertion Point Tag	Source	Description
<HL7ReferringMiddle/>	ADT Feed	Referring Physician Middle … Name or Initial
<HL7ReferringSig/>	Computed by Return Handler	Referring Physician FirstName Initial, LastName, Suffix, Credentials
<HL7Room/>		Room Number
<HL7Sex/>	ADT Feed	Sex (Male/Female)
<HL7SSN/>	ADT Feed	Social Security Number
<HL7Weight/>	Feed	Patient's Weight
<JobID/>	Database query	Internal Job# - assigned by DN4
<JobSTAT/>	Database query	Blank for normal priority, U for STAT
<MTID/>	Database query	Database ID for DocQscribe User who transcribed the report
<MTInitials/>	Database query	Initials of DocQscribe User who transcribed the report
<OriginalJobNo/>	Database query	Job # given to dictator
<UserCredentials/>	Database query	Dictator>Details>Credentials
<UserEmail/>	Database query	Dictator>Contact Info>Email
<UserFax/>	Database query	Dictator>Contact Info>Fax
<UserForeName/>	Database query	Dictator>Details>First Name

Insertion Point Tag	Source	Description
<UserID/>	Database query	Database ID for Dictator
<UserInitial/>	Database query	Dictator>Details>Middle Name
<UserInitials/>	Computed by Return Handler	Dictator Initials
<USERSIGBLOCK/>	Database query	Dictator>Details>Additional Signature Information
<USERSIGNAME/>	Computed by Return Handler	ForeName Initial SurName, Suffix, Credentials
<UserSuffix/>	Database query	Dictator>Details>Suffix
<UserSurName/>	Database query	(e.g. Jr., Sr., or III)
<UserTitle/>	Database query	Dictator>Details>Last Name

Index