eSOne InQuiry InVision

Unsigned Transcription Summary & Associate Turnaround Reports

Release Notes

What's New?

DeliverHealth is excited to announce important updates to two InQuiry InVision reports, aimed at enhancing your experience and providing greater customization and detail.

We have implemented significant updates to the **Unsigned Transcription Summary Report**, focusing on improving customization, offering more detailed information, and introducing multi-select options. These enhancements ensure that the report better aligns with the evolving needs of our users.

The latest updates to the Associate Turnaround report are designed to enhance your reporting experience by providing more detailed and customizable search options. Additionally, the report output now includes more insightful information to support your decision-making process.

Unsigned Transcription Summary Report

1. **Multi-Select Location Parameter:**
   - The report now supports multi-select options for the Location parameter, allowing one, more, or all locations to be included in the report.
2. **Additional Authenticator Columns:**
   - New Additional Authenticator columns have been added to reflect different name formats:
     - **Additional Authenticator (First Last, Suffix)**
     - **Additional Authenticator (Last, First, Suffix)**
   - These fields are available in the "available fields" list to customize the report output.
3. **Clinician Columns:**
   - New clinician columns have been added to reflect different name formats:
     - **Clinician (First Last, Suffix)** – This column will use the client's custom label for "Clinician".
     - **Clinician (Last, First, Suffix)** - Customized with the client's label for Clinician.
   - These fields are available in the "available fields" list to customize the report output and uses the client's custom label for Clinician, ensuring consistency with client-specific terminology.

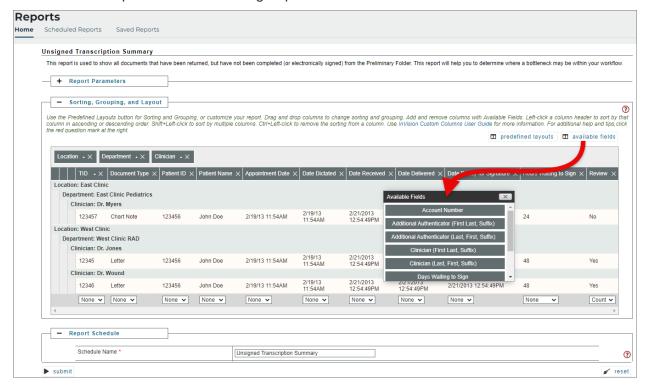**DeliverHealth**

4. **Account Number Column:**
   - **Account Number** has been added to the list of available columns. This field uses the client's custom label for Account Number, ensuring consistency with client-specific terminology.

5. **Order Number Columns:**
   - Added columns for Order Number information:
     - **Order Number (Appointment Record)** - Displays the order number from the appointment record, using the client's custom label.
     - **Order Number (Order Record)** - Displays the order number from the order record, using the client's custom label.

6. **User Group Column:**
   - **User Group** column has been introduced to show the name of the user group to which the dictating clinician belongs. This helps in categorizing and analyzing reports based on user group affiliations.

Customization and Configuration: All new columns can be included in the report output as per your preferences. Adjustments can be made through the report configuration settings to tailor the data presentation to your specific requirements.

Getting Started: To take advantage of these new features, access the custom columns report in InQuiry > Reports > Home, choose the Unsigned Transcription Summary report, and configure the report as needed in the ***Sorting, Grouping, and Layout*** section, or edit an existing saved report configuration. Refer to the Custom Columns Reports User Guide for detailed instructions, or contact our support team.

Associate Turnaround Report

1. **Associate Filter Search**:
   - We have introduced a new "Associate Filter" text box within the report search parameters.
   - This feature allows you to enter alpha-numeric text to filter results based on the following associate-related fields:
     - First Name (full or partial)
     - Last Name (full or partial)
     - Business Name (full or partial)
     - Associate Code (exact match required)
   - Only associates matching the entered text and other report parameters will be included in the report results.

2. **Standard Report Header**:
   - The standard report header has been added to the top of the report for consistency and clarity.

3. **New Report Columns**:
   - **Associate Business Name**: This column has been added immediately after the Associate Name column.
   - **Associate Address Fields**: The following address fields have been added between the Associate Business Name and TID columns:
     - Address 1, Address 2, Address 3
     - City, State, Zip (or comparable address fields for AU and CA)
   - **Workflow Status**: This new column will display the current workflow folder the job is in, excluding the Referral folder. Client-specific custom folder names will be used. It is placed after the existing Status column.

4. **Field Renaming**:
   - The "Date Completed" field has been renamed to **"Date Distributed"** and will now include a time stamp for more precise reporting.
   - The "Status" field has been renamed to **"Distribution Status"** for clearer communication of the job's current distribution status.

These updates are now live and available for use. We are confident that these enhancements will provide a more robust and efficient reporting experience.

Minimum Application Requirements

– Operating system: Windows 10
– Web Browser: Chrome, Edge, Firefox
– RAM: 1 GB or higher
– Processor: 1 GHz or faster (32 or 64-bit Architecture)
– Hard Drive Free Space: 1 GB or higher

DeliverHealth