



Surgical & Notes

**SNChart
Web Instruction Manual
Full Access**
www.snchart.com

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Logging into the System



Step 1: Open **Internet Explorer**, and go to www.snchart.com

Important: SNChart is currently intended for use only with Internet Explorer. Firefox, Chrome, Safari and other browsers are currently not supported.

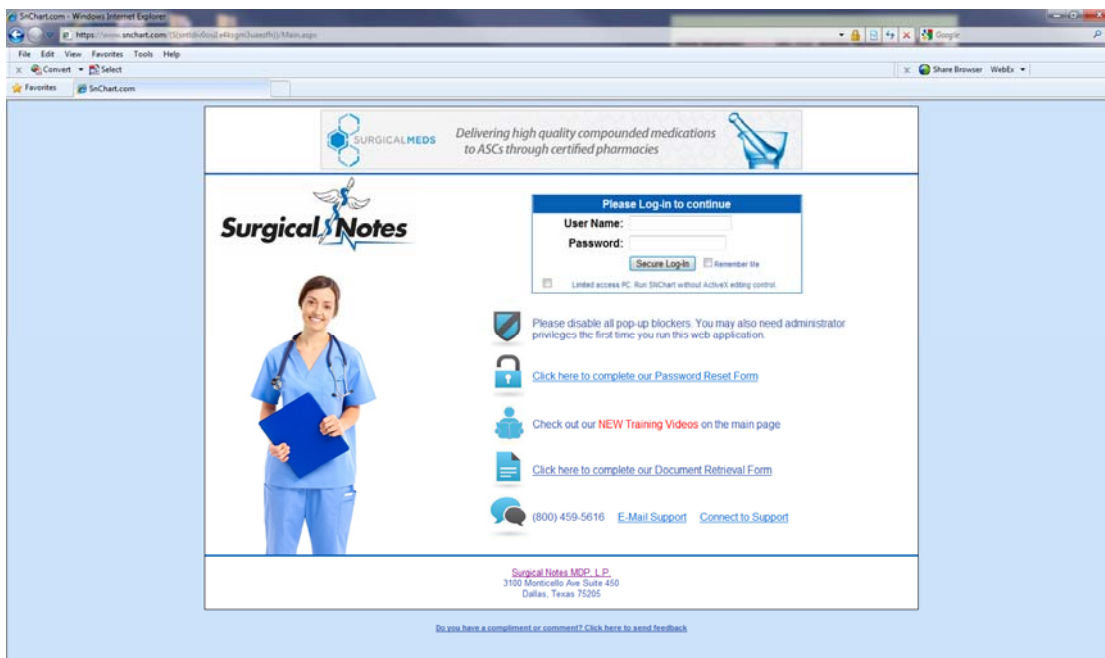


Step 2: Enter your **Username and Password**

If you do not know your username or password, please contact Surgical Notes at (800) 459-5616. HIPAA prohibits the sharing of usernames and passwords or the issuance of generic facility usernames.



Step 4: Click **Log In**



Main Page

After you successfully log in, you are taken to the main page. This page displays transcriptions, or jobs, completed within the last 7 days and allows you to search for a transcription, print or download transcriptions, view job details and more.

User Manual Password Change Update Profile Change Account Training Account: 900 - Surgical Notes Test Account - Logout

Print Download Hold Job Release Hold

Facility Job Statistics Incomplete: 2 Complete: 56 Archive: 394 Open: 1 Hold: 0

Last 7 Days of Completed Reports Keep Selected Items Checked After Action Search Criteria

Job ID	WorkType	DOS	Patient ID	Patient	Physician	Job Completed							Comments
<input type="checkbox"/> 900-TEST-66536322	HI	06/17/2013	4456	Marlin, Ellen	C. BLANKINSHIP	6/18/2013 1:27:03 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit
<input type="checkbox"/> 900-52012013	OP	06/13/2013	2113	Manning, Tony	C. BLANKINSHIP	6/18/2013 1:26:09 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit
<input type="checkbox"/> 900-TEST-95747854	HI	06/12/2013	12505	Stumpfig, Scott	C. BLANKINSHIP	6/18/2013 1:25:59 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit
<input type="checkbox"/> 900-TEST-52165487	OP	06/14/2013	25452	Warner, Brenda	P. Pearson	6/18/2013 1:25:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit
<input type="checkbox"/> 900-11678812	HI	06/12/2013	5675	Robinson, Paul	E. Muan	6/18/2013 1:25:09 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit



The checkboxes on the far left allow you to perform actions on multiple transcriptions easily. For example, if you check off multiple transcriptions for print, a single PDF file will be prepared for you to conveniently print all documents at once.

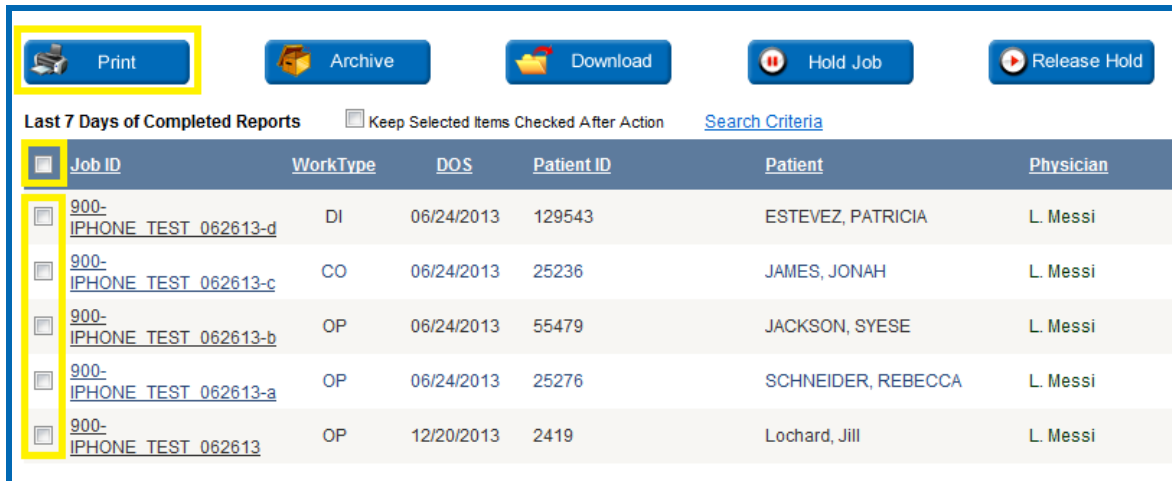
Use the icons on the right to see the action history of each transcription. A check mark in the box corresponding to each icon indicates a completed action. The legend below describes what each icon means. You can also learn what the icons represent when you are on the SNChart portal by hovering over each icon with your mouse.

Legend	
	Printed
	Signed
	Downloaded
	Reviewed
	Coded
	Charge Entry

Printing & Downloading Transcriptions

Printing:


From the main screen, select the check box next to each transcription you would like to print OR click the Select All check box to select all displayed transcriptions at once.



Print Archive Download Hold Job Release Hold

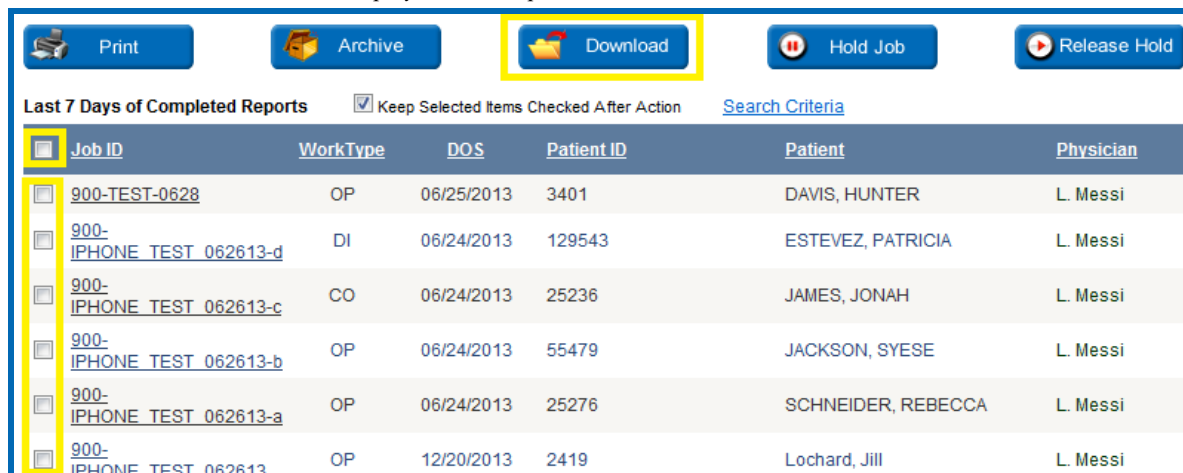
Last 7 Days of Completed Reports Keep Selected Items Checked After Action [Search Criteria](#)

<input type="checkbox"/>	Job ID	WorkType	DOS	Patient ID	Patient	Physician
<input type="checkbox"/>	900-IPHONE_TEST_062613-d	DI	06/24/2013	129543	ESTEVEZ, PATRICIA	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-c	CO	06/24/2013	25236	JAMES, JONAH	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-b	OP	06/24/2013	55479	JACKSON, SYESE	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-a	OP	06/24/2013	25276	SCHNEIDER, REBECCA	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613	OP	12/20/2013	2419	Lochard, Jill	L. Messi

Then click  to combine all selected transcription into a single print job. A pop-up window will appear prompting to “Click Here to Print”. Click the button indicated to queue your print job.

Downloading:


From the main screen, select the check box next to each transcription you would like to download OR click the Select All box to select all displayed transcriptions at once.



Print Archive Download Hold Job Release Hold

Last 7 Days of Completed Reports Keep Selected Items Checked After Action [Search Criteria](#)

<input type="checkbox"/>	Job ID	WorkType	DOS	Patient ID	Patient	Physician
<input type="checkbox"/>	900-TEST-0628	OP	06/25/2013	3401	DAVIS, HUNTER	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-d	DI	06/24/2013	129543	ESTEVEZ, PATRICIA	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-c	CO	06/24/2013	25236	JAMES, JONAH	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-b	OP	06/24/2013	55479	JACKSON, SYESE	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613-a	OP	06/24/2013	25276	SCHNEIDER, REBECCA	L. Messi
<input type="checkbox"/>	900-IPHONE_TEST_062613	OP	12/20/2013	2419	Lochard, Jill	L. Messi

Then click  to download the selected transcriptions into a compressed folder.

Searching for a Transcription

To search for a transcription, click the [Search Criteria](#) link on the main page.

This will present you with the search menu.

Search for a Transcription

Patient Last	<input type="text"/>	Patient ID	<input type="text"/>	Search By	<input type="text" value="Search All Dates"/>
Status	<input type="text" value="Show All"/>	Work Type	<input type="text" value="Show All"/>		
Printed	<input type="text" value="Show All"/>	Physician	<input type="text" value="Select All"/>		
Downloaded	<input type="text" value="Show All"/>	E-Signature	<input type="text" value="Show All"/>		
Reviewed	<input type="text" value="Show All"/>	Job ID	<input type="text"/>		
Coded	<input type="text" value="Show All"/>				

[Reload Default Search](#)

You can search by any combination of the displayed fields. The **Patient Last** field will accept partial searches. For example, to find "Jane Smith" you can enter "*Smi*" in the Patient Last field. Likewise, you can use the "E-Signature" dropdown to filter your search to transcriptions that have been electronically signed.

When searching by a date, you must select the date type from the drop down list. Then either manually enter the Start and End Date, or click on the calendar icons to select your date range.



Editing a Transcription Document

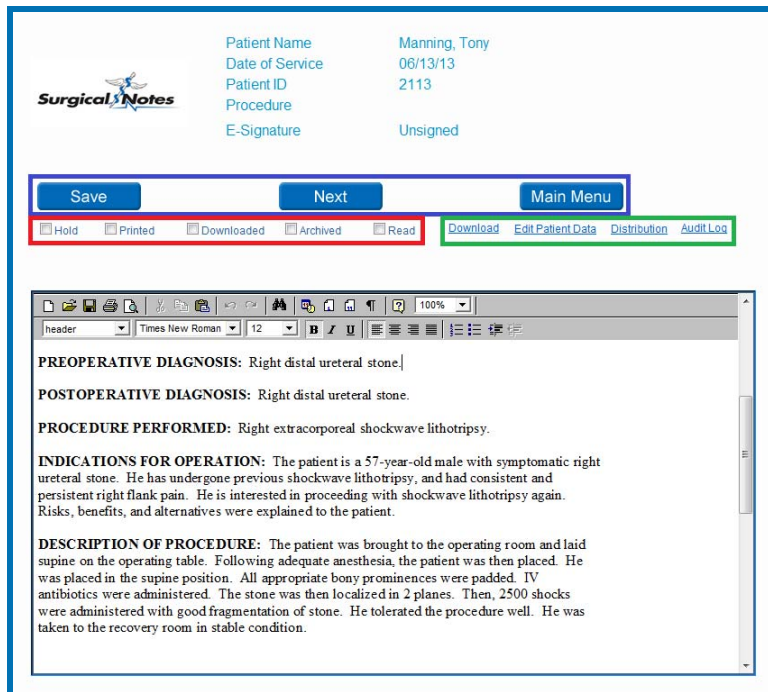
To edit a transcription document, click on the underlined Job ID for the document you want to edit. You may edit multiple documents in succession by checking the documents you want to edit, then clicking the underlined Job ID of any selected document. Transcriptions that have been electronically signed cannot be edited and will be presented in a read-only state.

Job ID	WorkType	DOS	Patient ID	Patient	Physician	Job Completed							Comments
<input checked="" type="checkbox"/> <u>900-TEST-0628</u>	OP	06/25/2013	3401	DAVIS, HUNTER	L. Messi	6/28/2013 3:03:59 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit
<input checked="" type="checkbox"/> <u>900-IPHONE TEST 062613</u> -d	DI	06/24/2013	129543	ESTEVEZ, PATRICIA	L. Messi	6/26/2013 3:37:30 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit

You will then be taken to the following page:

BUTTON COMMANDS

Save: Saves the transcription changes **Next:** Goes to the next selected document **Main Menu:** Returns to home screen



The screenshot shows the Surgical Notes interface. At the top left is the Surgical Notes logo. To the right, patient information is displayed: Patient Name (Manning, Tony), Date of Service (06/13/13), Patient ID (2113), Procedure, and E-Signature (Unsigned). Below this is a row of buttons: Save, Next, and Main Menu. Underneath the buttons is a row of checkboxes: Hold, Printed, Downloaded, Archived, Read, Download, Edit Patient Data, Distribution, and Audit Log. The main area of the interface shows a transcription document with the following text:

PREOPERATIVE DIAGNOSIS: Right distal ureteral stone.
POSTOPERATIVE DIAGNOSIS: Right distal ureteral stone.
PROCEDURE PERFORMED: Right extracorporeal shockwave lithotripsy.
INDICATIONS FOR OPERATION: The patient is a 57-year-old male with symptomatic right ureteral stone. He has undergone previous shockwave lithotripsy, and had consistent and persistent right flank pain. He is interested in proceeding with shockwave lithotripsy again. Risks, benefits, and alternatives were explained to the patient.
DESCRIPTION OF PROCEDURE: The patient was brought to the operating room and laid supine on the operating table. Following adequate anesthesia, the patient was then placed. He was placed in the supine position. All appropriate bony prominences were padded. IV antibiotics were administered. The stone was then localized in 2 planes. Then, 2500 shocks were administered with good fragmentation of stone. He tolerated the procedure well. He was taken to the recovery room in stable condition.

LINK COMMANDS

- Download:** Downloads the word file as a compressed .ZIP file
- Edit Patient Data:** Brings up the patient demographic information for modification
- Distribution:** Shows the distribution menu, allows direct fax and email of the transcription
- Audit Log:** Shows the jobs audit history

CHECK BOX COMMANDS

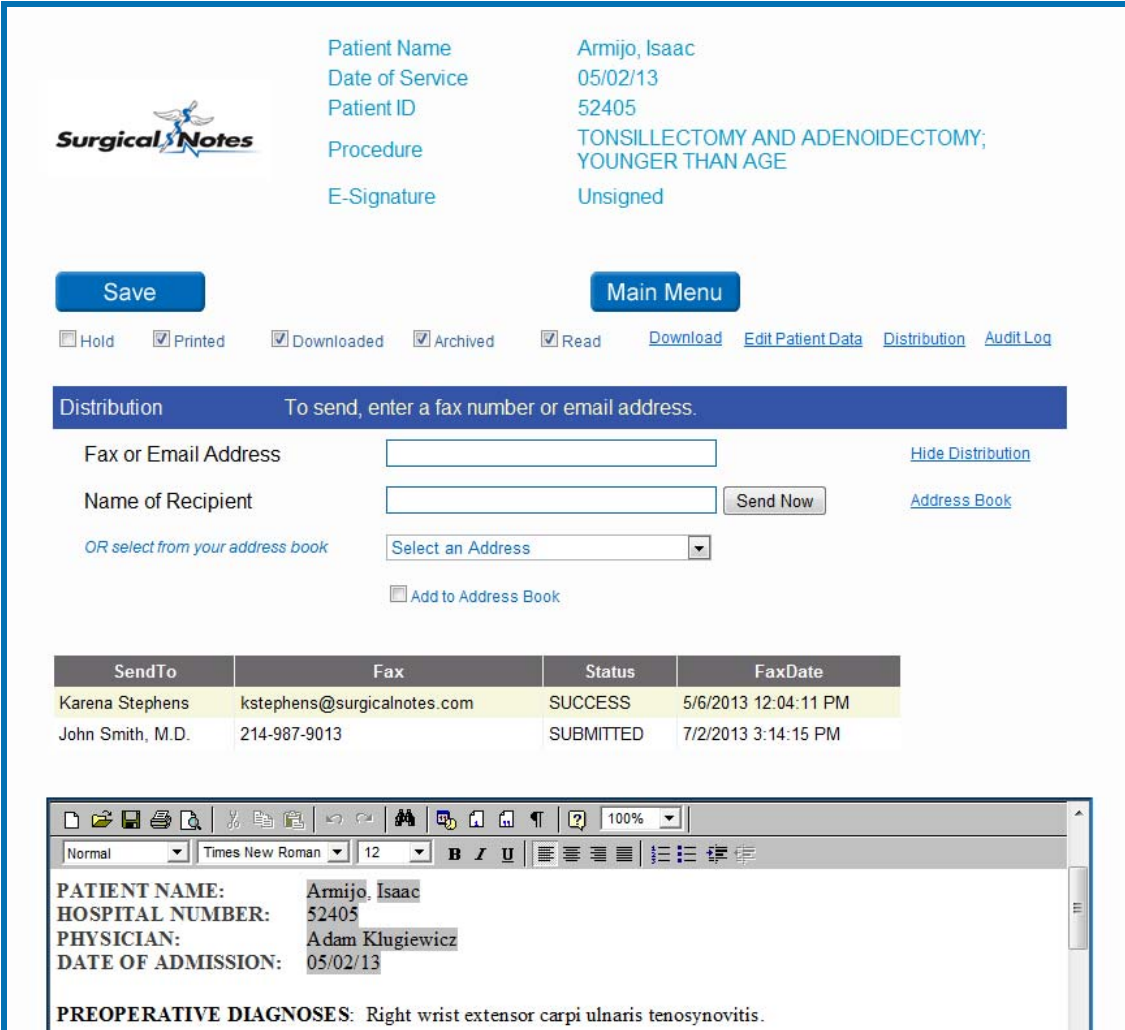
- Hold:** Places/removes hold
- Printed:** Marks transcription as printed
- Read:** Marks Transcription as reviewed
- Downloaded:** Marks transcription as downloaded

Transcription Distribution (Fax or E-Mail)

SNChart allows you to directly fax or e-mail a transcription document from the edit transcription web page. You can also view the distribution history for the transcription document.

From the edit transcription screen, click on [Distribution](#)

To send a copy of the transcription, simply enter the destination fax number or email address, and then click . It may take a moment to process your request. The screen will display confirmation after it has been sent.



Patient Name: Armijo, Isaac
 Date of Service: 05/02/13
 Patient ID: 52405
 Procedure: TONSILLECTOMY AND ADENOIDECTOMY; YOUNGER THAN AGE
 E-Signature: Unsigned

Hold Printed Downloaded Archived Read [Download](#) [Edit Patient Data](#) [Distribution](#) [Audit Log](#)

Distribution To send, enter a fax number or email address.

Fax or Email Address: [Hide Distribution](#)

Name of Recipient: [Address Book](#)

OR select from your address book:

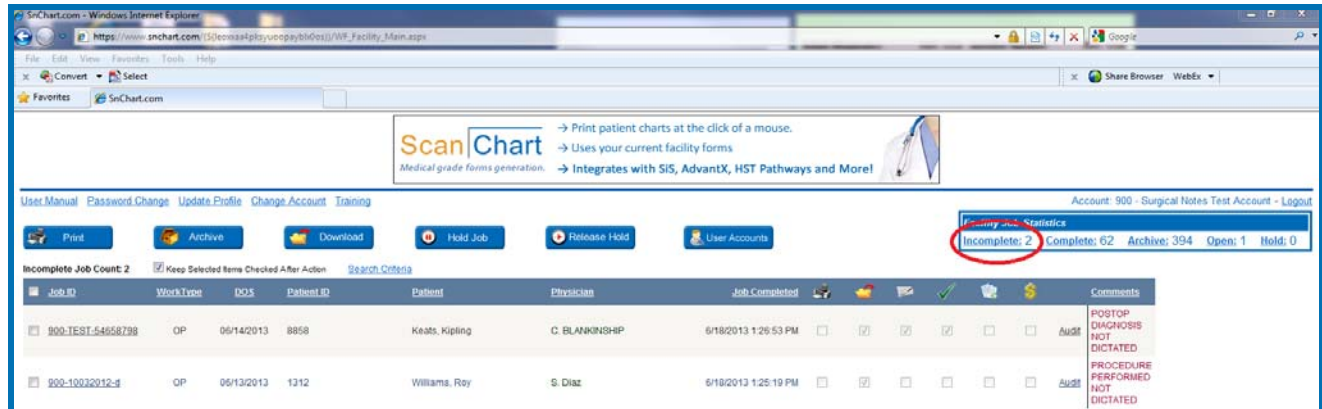
SendTo	Fax	Status	FaxDate
Karena Stephens	kstephens@surgicalnotes.com	SUCCESS	5/6/2013 12:04:11 PM
John Smith, M.D.	214-987-9013	SUBMITTED	7/2/2013 3:14:15 PM

PATIENT NAME: Armijo, Isaac
 HOSPITAL NUMBER: 52405
 PHYSICIAN: Adam Klugiewicz
 DATE OF ADMISSION: 05/02/13
 PREOPERATIVE DIAGNOSES: Right wrist extensor carpi ulnaris tenosynovitis.

An audit trail showing the date/time of the distribution activity, status and destination is provided when you click on the distribution link.

Resolving Incomplete Jobs

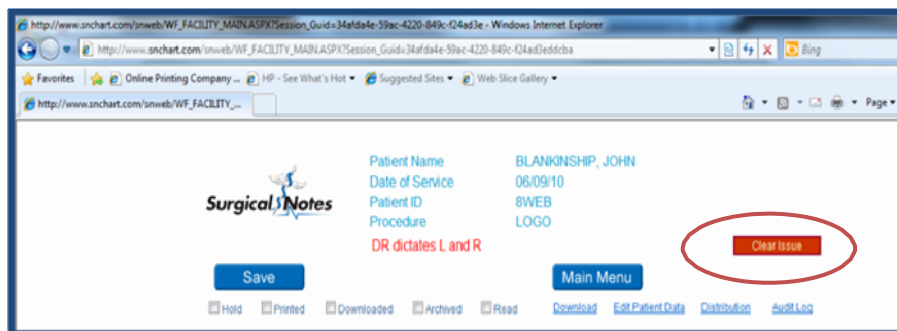
At times, Surgical Notes will place a transcription into the "Incomplete" bin. This means the document requires resolution from your facility. This may include a dictation where the audio cannot be comprehended to inconsistent or missing patient information.



The number next to **Incomplete** indicates the number of transcriptions, or jobs, in the Incomplete bin waiting for your resolution. Clicking on the **Incomplete** link will display the jobs and corresponding comments from the transcriptionist or your account manager.


Resolving an Incomplete Job

To resolve an issue, click the Job ID. This will take you to the edit transcription screen.



You should make the necessary adjustments to the transcription to resolve the issue, save your changes and then click the **Clear Issue** button. If the issue cannot be resolved or if you have questions about the issue, please call (800) 459-5616, and speak with your account manager for further clarification.

User Accounts

Click  to view your user management portal. User Management allows you to manage existing users and add new users.

The user management default screen will show you all users accessing the system for your facility, their relationship to the facility and the last time the user accessed the system.

Home		Add User			
Last Name	First Name	User Name	E-Mail	Organization	Last Accessed
Bishop	Randy	RBishop	Rbishop@surgicalnotes.com	Facility Employee	Manage User
Branch	Meech	MBranch	mbranch@hayoo.com	Facility Employee	11/16/2010 Manage User
Branch	Michelle	MBranch1	mbranch@aol.com	Facility Employee	Manage User
Clinic	Test	TClinic	kstrather@surgicalnotes.com	Coding Company	12/28/2010 Manage User
Curtis	David	DCurtis1	raymond@surgicalnotes.com	Facility Employee	Manage User
Doe	Jane	JDoe2	jane@sn.com	Physician Office Employee	Manage User
McTester	Testy	TMcTester	tester.test@gmail.com	Facility Employee	12/15/2010 Manage User
moodley	tarryn	tmoodley1	tarryn.moodley@yahoo.com	Facility Employee	Manage User
newsome	ray	rnewsome	raymond@surgicalnotes.com	Facility Employee	10/18/2010 Manage User
Ramirez	Bo	BRamirez	bramirez@surgicalnotes.com	Facility Employee	11/16/2010 Manage User
Test	Account	sntest	Tarryn@surgicalnotes.com	Facility Employee	1/7/2011 Manage User
Turner	Kathy	KTurner1	raymond@surgicalnotes.com	Facility Employee	Manage User
Venters	Josh	JVenters	jventers@surgicalnotes.com	Facility Employee	Manage User

User Rights & Permissions

- This user can add, modify and remove system users.
- This user may edit transcriptions.
- This user may archive transcriptions
- This user may mark transcriptions as read.
- This user may electronically sign transcriptions.
- Allow Coding Access - Edit
- Allow Coding Access - View

Account Options

- This user must change his/her password on next login.
- This user is INACTIVE and should be removed from the facility list.

Dictators Authorized

*If no physicians are checked, user will be able to access ALL facility physicians.
If one or more physicians are selected, this user will only be able to access SNChart.com. Any legacy SNChart software will not work.*

- Courtney Blankinship, M.D.
- Robert Brown, M.D.
- Cheryl L. Bull, M.D.
- Steven Diaz, M.D.
- Casandra Dobbs, M.D.
- Jon Doe, MD
- Adam Klugiewicz
- William K. Lanier, M.D.
- Tarryn Moodley, National Account Director
- Eric Muan, M.D.
- Paul Pearson, M.D.
- Paul Pierce
- Matt St. Lawrence, DDS

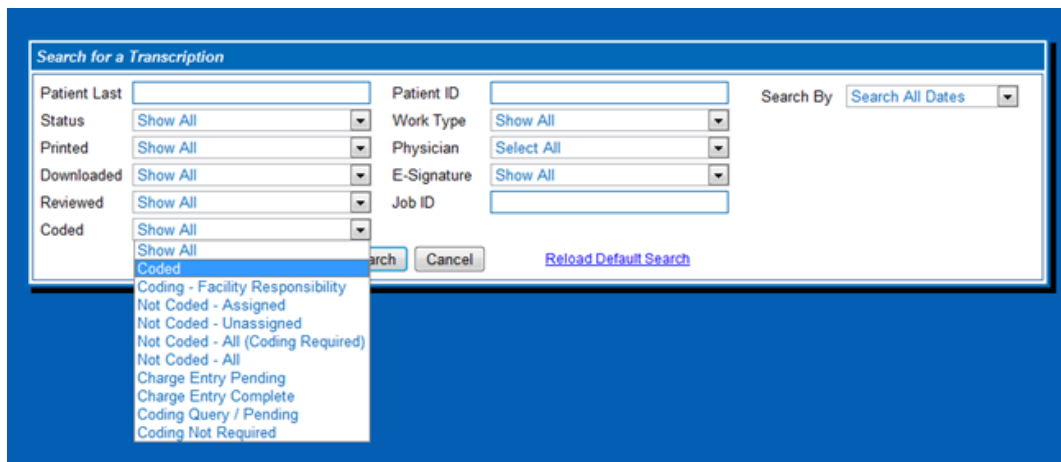
You can select the rights & permissions for each user as well as restrict access to certain physician or group of physicians.

You will also be able to reset the password and de-activate users.

SN Coding Download

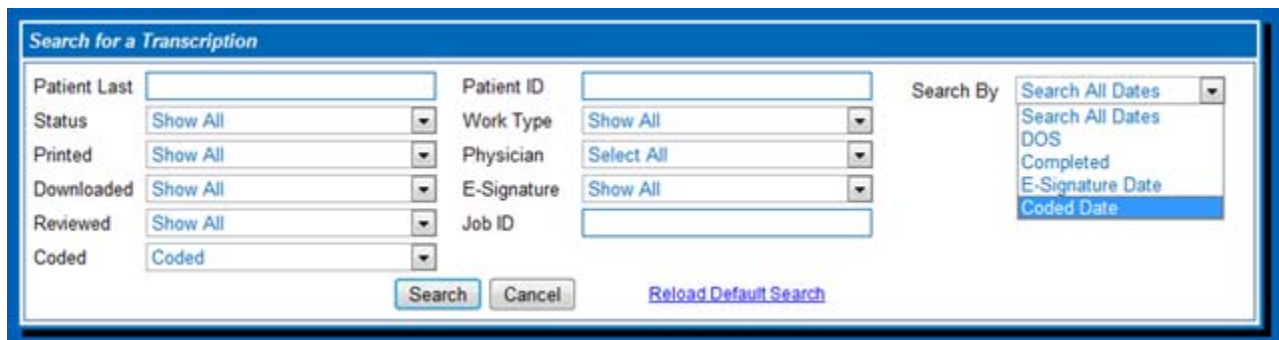
Surgical Notes also provides coding services. If we code for your facility, all codes are conveniently available for download on SNChart. To download your codes follow the instructions below:

1. Click the [Search Criteria](#) link.
2. Use the Coded drop down box to filter for coded transcriptions.



The screenshot shows the 'Search for a Transcription' form. The 'Coded' dropdown menu is open, displaying the following options: Show All, Coded, Coding - Facility Responsibility, Not Coded - Assigned, Not Coded - Unassigned, Not Coded - All (Coding Required), Not Coded - All, Charge Entry Pending, Charge Entry Complete, Coding Query / Pending, and Coding Not Required. The 'Search' button is visible at the bottom of the form.

You can use the date menu to search for transcriptions coded on a specific day or within a date range.



The screenshot shows the 'Search for a Transcription' form. The 'Search By' dropdown menu is open, displaying the following options: Search All Dates, Search All Dates, DOS, Completed, E-Signature Date, and Coded Date. The 'Coded' dropdown menu is also open, showing 'Coded' as the selected option. The 'Search' button is visible at the bottom of the form.

3. Once your search results have loaded, use the check boxes on the left to individually select the transcriptions you need or click the Select All checkbox to select all results.

4. Click the  button.

5. This action will generate a coding spreadsheet in MS Excel format and will prompt you to save or open the file.

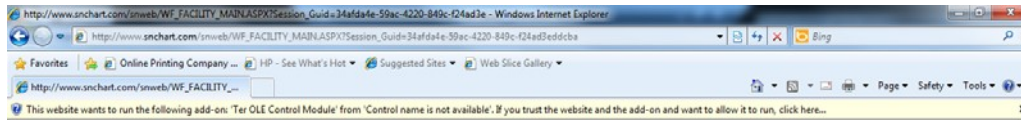
Troubleshooting

Pop-Up Blockers

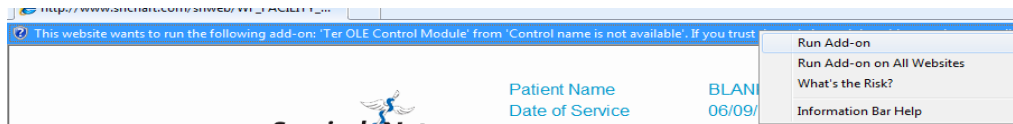
Some of the functions of SNChart require pop-up windows. You will want to disable all pop-up blockers or allow pop-ups from *.SNChart.com.

ActiveX Component

When editing a transcription for the first time, you may be prompted to install an ActiveX component.



If you get this message, click on the yellow bar then select **Run Add-on** or **Install this Add-On**.



You may be prompted for authorization to install the Active-X component. Click **Run** or **Install**.



Adobe Acrobat Reader

If you see the window below when printing, you do not have Adobe Reader. The print feature requires this application. It is available for free download at <http://get.adobe.com/reader/>

