



Mobile App User Guide

iOS & Android

Introduction

Welcome to the Surgical Notes mobile app, the most modern, user-friendly, and convenient way to dictate, review, and electronically sign reports and address physician coding queries.

This user guide contains essential information for a Surgical Notes mobile app user to make full use of the application as part of our SNChart (clinical documentation and medical transcription) and SNCoder (medical coding) solutions for ambulatory surgery centers (ASCs).

What is the Surgical Notes Mobile App?

The Surgical Notes mobile app is designed to be used in conjunction with SNChart, our clinical documentation and medical transcription service, and SNCoder, our medical coding service. The mobile app contains features and functionality that can be used by physicians to support these two very important parts of the overall revenue cycle process for an ASC.

Physicians are shown their individual schedules and reports, allowing them to dictate, review, edit, and sign efficiently. Push notifications and a dashboard help users identify action items quickly to eliminate missing dictations and signatures and expedite billing.



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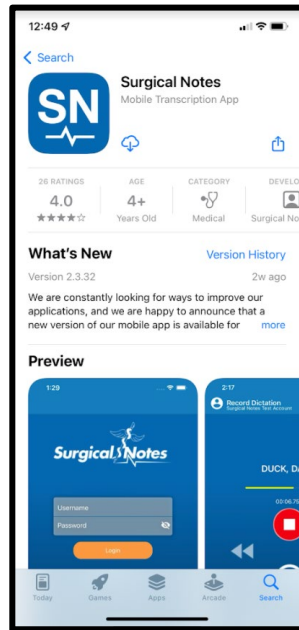
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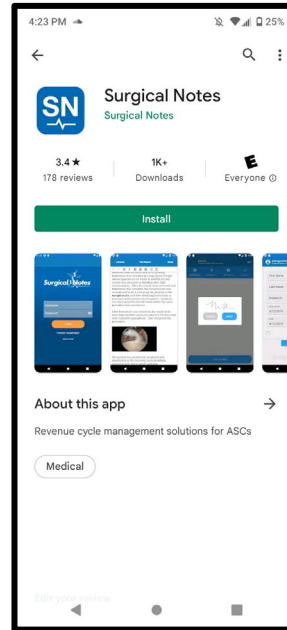
App Installation

1. Search for “Surgical Notes” in the App Store (iOS/Apple devices) or Google Play (Android devices).

App Store



Google Play



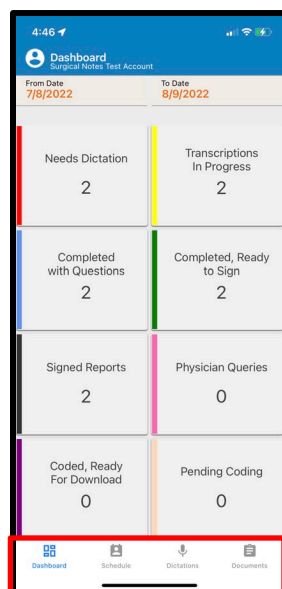
2. Install the app.
3. Once the download is complete, this app will appear on your mobile device home screen:



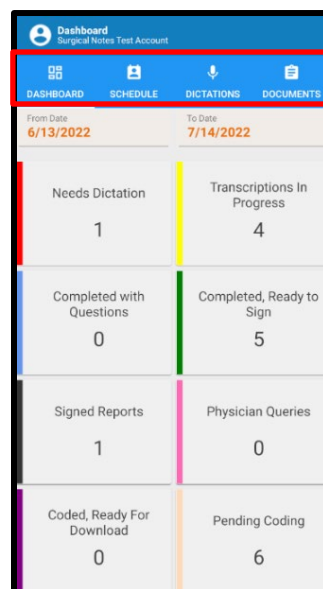
iOS vs. Android App

Please note: All the screenshots on this user guide are from an iPhone. However, the instructions provided apply to both iOS and Android devices. The biggest difference is the location of the navigation menu. This menu is located at the bottom of the screen on iOS devices and at the top of the screen on Android devices.

iOS



Android



Authentication (Login / Logout)

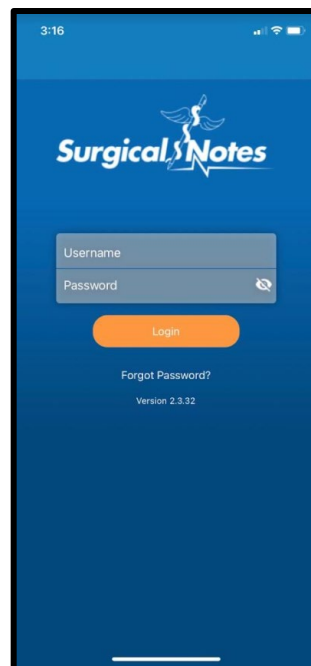
How to Log In

Username

In most cases, your username will be in the following format: Account#-Dictation#. The Account Number is the facility's identification number, and the Dictation Number is your personal identification number for dictation. For example, if the facility's Account Number is 900, and your Dictation Number is 100, you would type in "900-100" as your username. It is important to include the dash.

Password

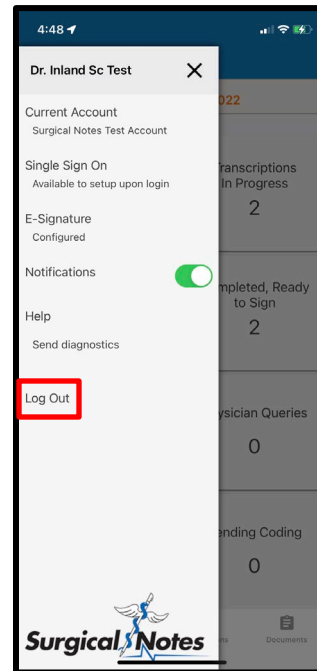
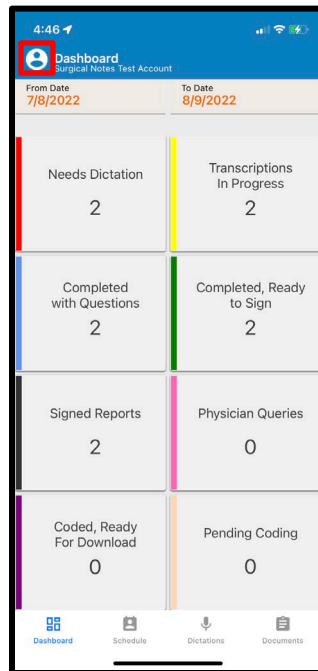
If this is the first time you are using the app AND you have never logged into our transcription management website, www.snchart.com, your password will be your dictation ID. If you have logged into SNChart previously, the password will be the personal password you set upon your initial login.



If you do not know your username or need assistance logging in, call Surgical Notes at (800) 459-5616. If you do not know your password, tap the [Forgot Password?](#) link. This will take you through a series of steps that will allow you to change your password.

How to Log Out - Method #2

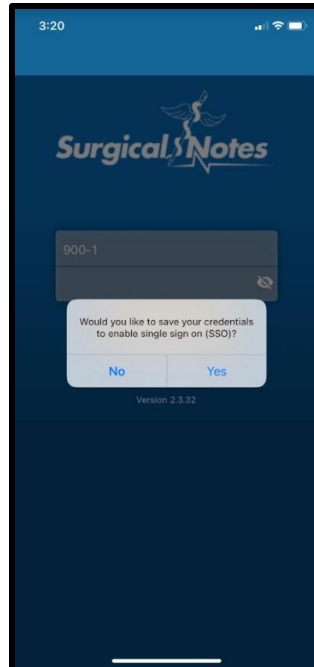
Tap the User icon at the top left of the screen to display the User App Menu. Then tap Log Out.



Single Sign On (SSO)

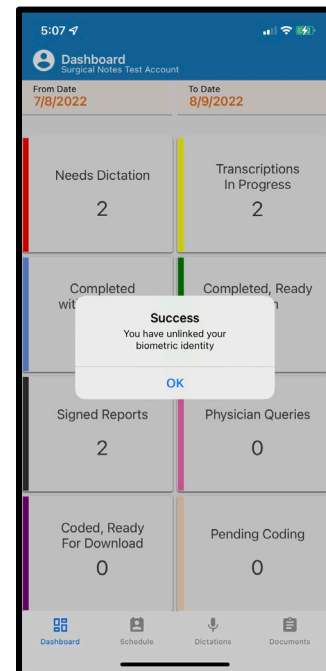
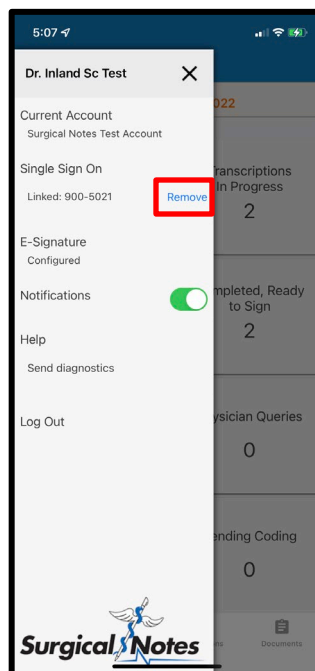
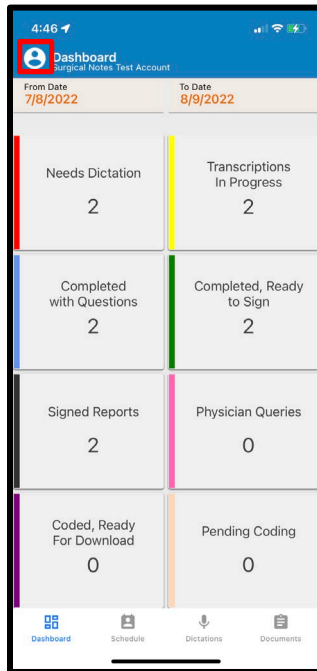
How to Enable SSO

Enabling SSO saves your login credentials and allows you to use your fingerprint (such as Touch ID for iOS devices) or facial recognition (such as Face ID for iOS devices) to log in to the app. Upon login, a window will pop up asking if you would like to enable SSO. Tap Yes to enable this feature or tap No if you prefer to type in your username and password each time. *If you perform surgery at multiple facilities that use Surgical Notes, contact your account manager to enable SSO with multi-facility access.*



How to Disable SSO

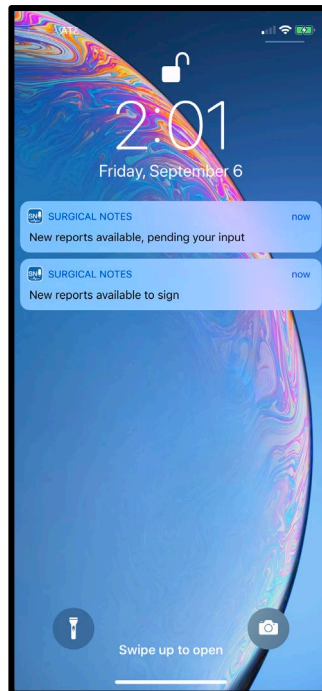
You can disable SSO from the User App Menu. Tap the User icon at the top left of the screen to display the User App Menu. Then tap Remove to disable SSO. A window will pop up to confirm the feature has been disabled.



Push Notifications

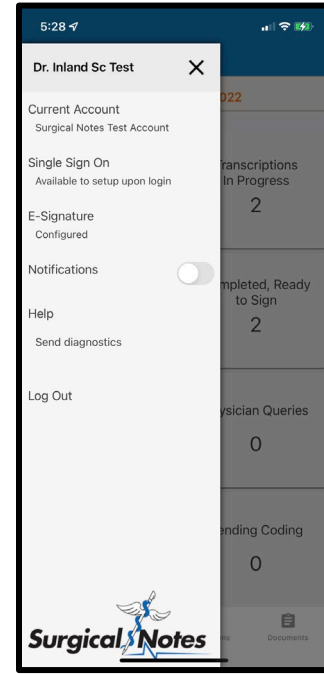
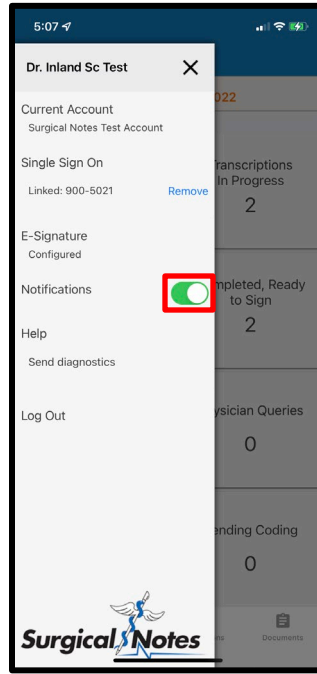
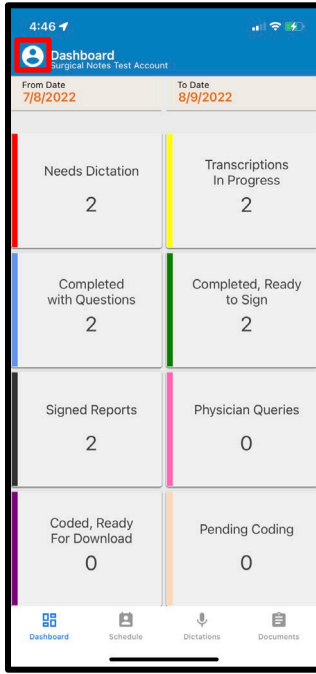
Push notifications help improve the overall efficiency and speed of operative report completion. These alerts display a message and/or play a sound on your device under the following conditions:

1. Completed reports with questions are available for your review and input
2. Completed reports are available for your review and signature
3. Physician queries are available for your review and signature
4. Patient visits are available for dictation



How to Enable/Disable Push Notifications

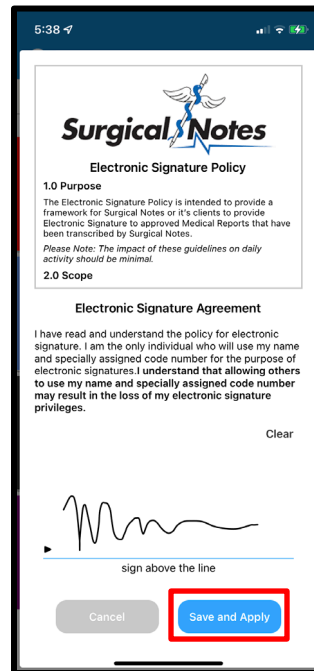
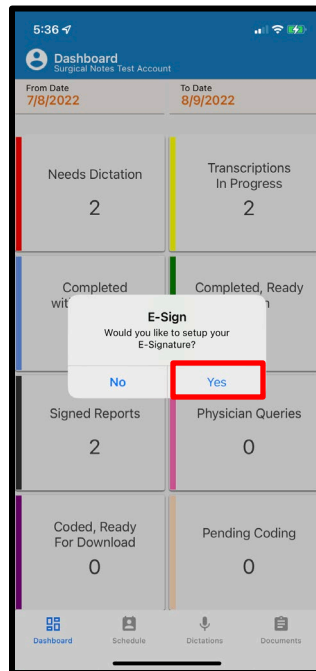
Push notifications are enabled by default. However, you can disable this feature if you do not want to receive these alerts. Tap the User icon at the top left of the screen to display the User App Menu. Then tap the switch next to Notifications to turn push notifications off.



Electronic Signature (eSig)

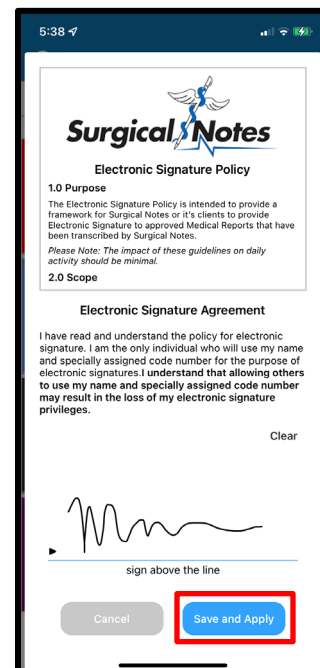
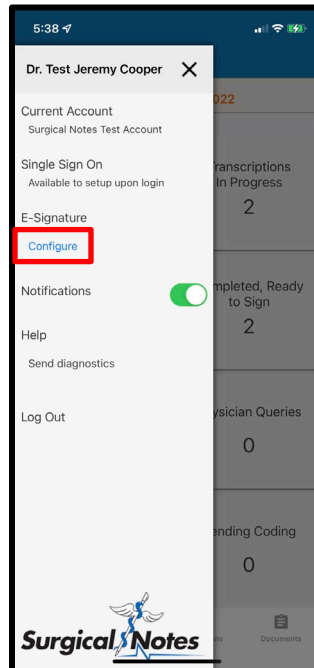
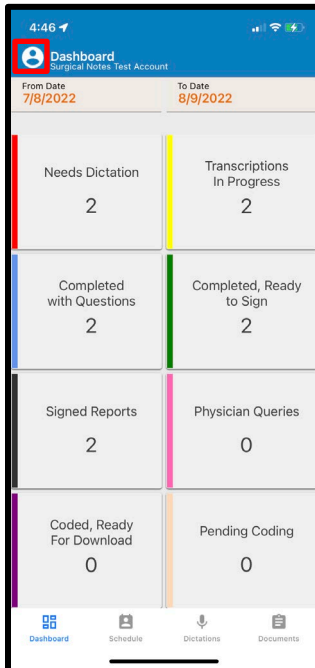
How to Enable Electronic Signature – Method #1

Upon your initial login, a window will pop up asking if you would like to set up your E-Signature. Tap Yes to proceed. You will be presented with Surgical Notes' Electronic Signature Policy. Sign above the line at the bottom of the screen using your finger or a stylus. Then tap the Save and Apply button.



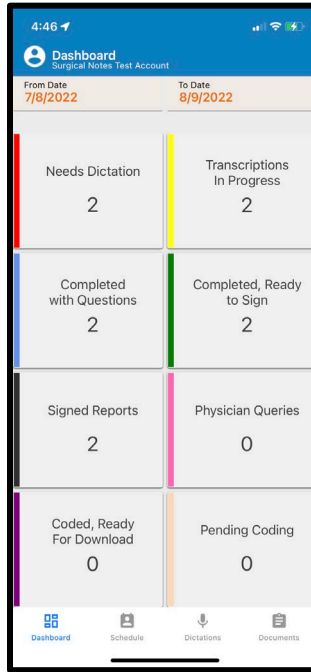
How to Enable Electronic Signature – Method #2

If you tapped No and did not move forward with setting up your electronic signature upon your initial login, you can set it up later through the User App Menu. Tap the User icon at the top left of the screen to display the User App Menu. Then tap the Configure link. You will be presented with Surgical Notes' Electronic Signature Policy. Sign above the line at the bottom of the screen using your finger or a stylus. Then tap the Save and Apply button.











Dashboard

You are immediately presented with the Dashboard upon logging in. You can also navigate to the dashboard by tapping Dashboard on the navigation menu. The default date range is the last 30 days, but you can edit this date range by changing the From Date and To Date.



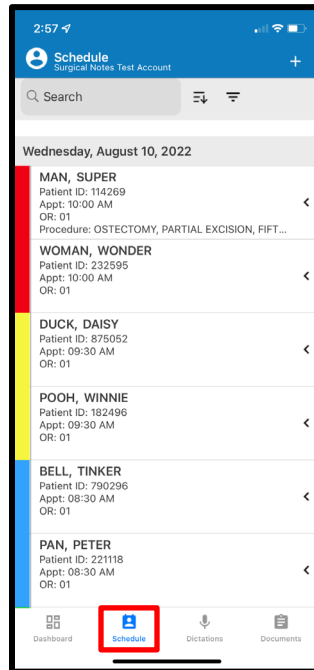
From the Dashboard, users can tap one of the eight tiles that represent the various states belonging to a case, query, and/or operative report. Upon selecting an option from the Dashboard, users are then shown a pre-filtered list of items for action.

Status	Status Color	Status Description
Needs Dictation		Patients on the schedule that do not yet have a dictation
Transcriptions in Progress		Dictations that are currently being transcribed and worked on by Surgical Notes
Completed with Questions		Reports that have been completed, but there are issues with the dictations that require your attention
Completed, Ready to Sign		Reports that are complete and ready to be reviewed and signed by the physician
Signed Reports		Reports that have been electronically signed by the physician
Physician Queries		Reports that are being coded but have issues, such as lack of information or specificity, that require your attention
Coded, Ready for Download		Reports that have been coded by Surgical Notes and the coding still needs to be exported
Pending Coding		Reports that are pending coding by Surgical Notes

Schedule

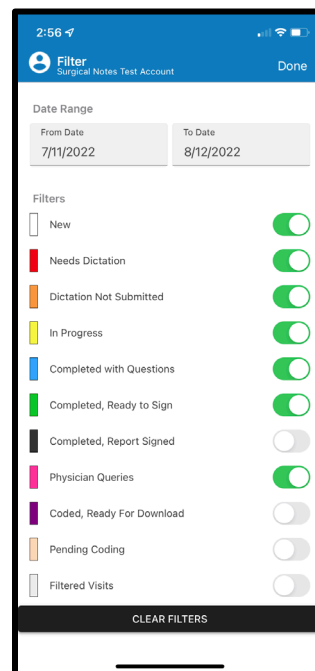
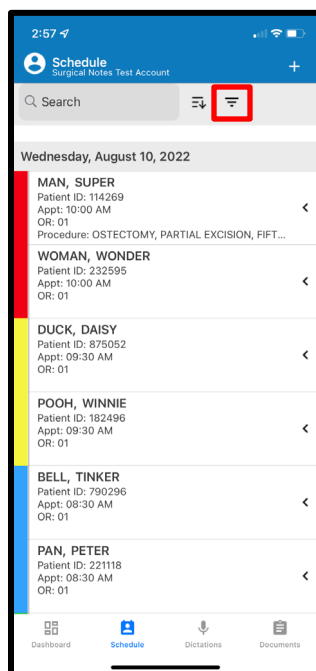
How to View the Schedule

Tap Schedule on the navigation menu. Status colors on the far left of each case indicate action items.



How to Filter the Schedule

Tap the filter icon at the top right of the Schedule screen to filter your schedule by date range or status. This screen also serves as a status legend indicating what each color means. Clear filters by moving switch buttons to off or tapping the CLEAR FILTERS button.

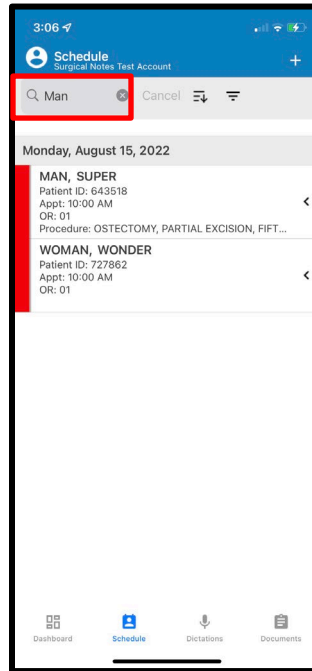


Status Descriptions

Status	Status Color	Status Description
New		Appointment was recently added to Schedule <i>Next Step: Record and submit dictation</i>
Needs Dictation		Appointment does not have a dictation recording <i>Next Step: Record and submit dictation</i>
Dictation Not Submitted		A dictation has been recorded for this appointment but not yet submitted <i>Next Step: Submit dictation</i>
In Progress		Dictation recording has been submitted for this appointment and is being transcribed <i>Next Step: Wait for report to be completed</i>
Completed with Questions		Report is available for this appointment, but there are questions about the dictation from Surgical Notes <i>Next step: Review questions and edit report, if needed</i>
Completed, Ready to Sign		Report is available for this appointment <i>Next step: Review, edit, and E-sign</i>
Completed, Report Signed		Report for this appointment has been signed <i>No further action needed</i>
Physician Queries		Report has a physician query from Surgical Notes that needs to be addressed to complete coding <i>Next step: Review physician query, complete, and sign</i>
Pending Coding		Reports that are pending coding by Surgical Notes
Filtered Visits		Appointment has been hidden from Schedule as dictation is not required or transcription is not handled by Surgical Notes

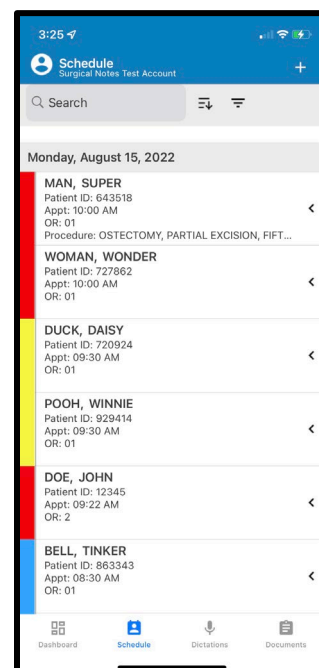
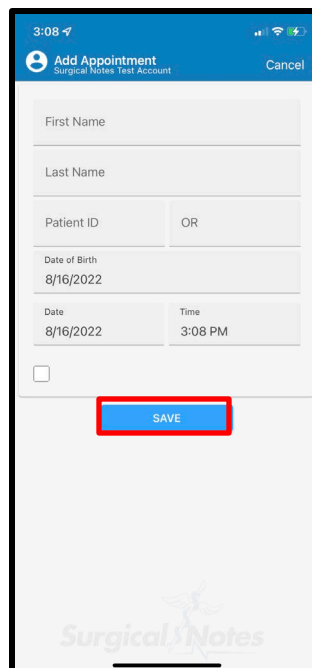
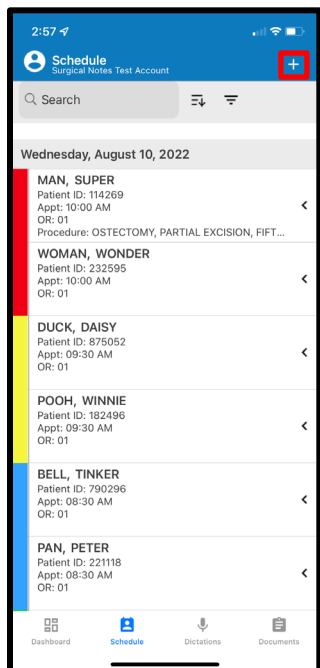
How to Search for a Patient

Tap into the Search bar at the top left of the Schedule screen to quickly find the appointments you need. You can search by patient first name, patient last name, or patient ID.



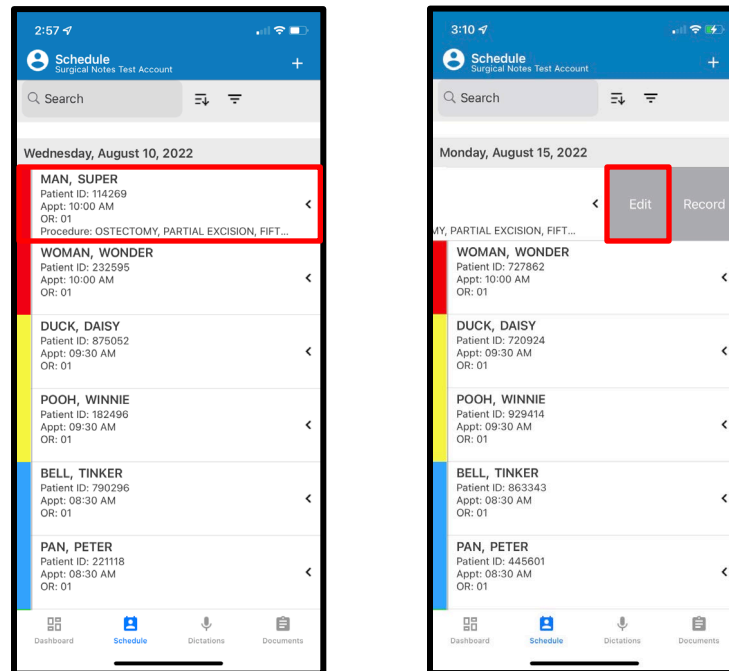
How to Add a Patient Manually

If an appointment has not been added to the facility's practice management system, it will not show up on the app Schedule. However, you can manually add a patient in order to dictate. From the Schedule screen, tap on the plus sign in the upper right-hand corner. This will take you to a screen that allows you to manually enter in the appointment details. Tap the Save button and the new appointment will appear on the Schedule with the red status tag indicating that it needs dictation.

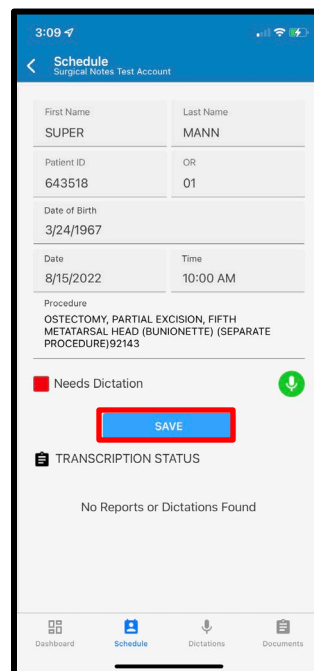


How to Edit an Appointment

Tap on the appointment on the Schedule. Alternatively, you can swipe left on the arrow on the appointment and then tap Edit.



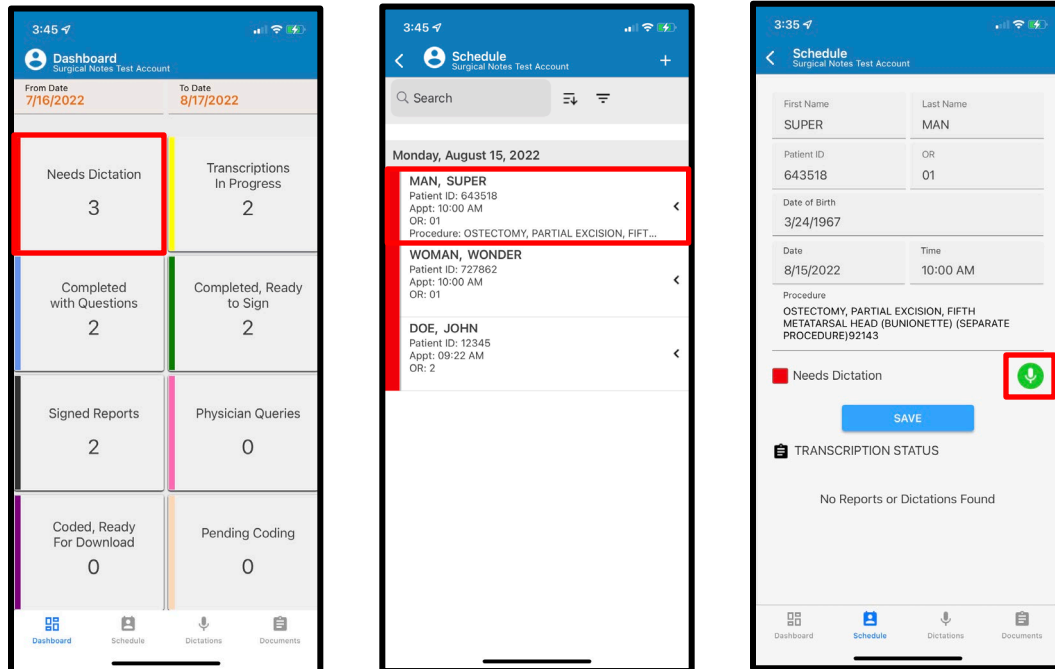
Make desired changes and then tap the Save button.



Dictation

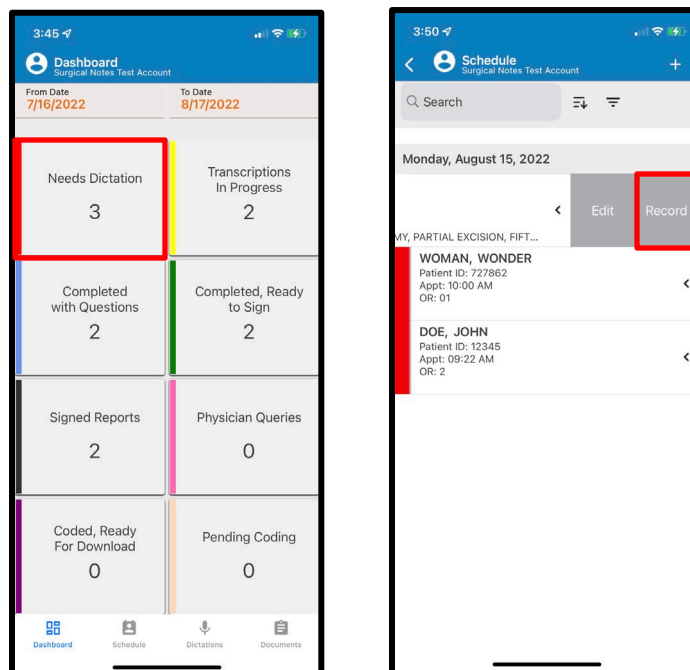
How to Select an Appointment for Dictation – Method #1

Tap the Needs Dictation tile on the Dashboard to access a list of cases that require dictation. Tap on the desired appointment on the Schedule. Then tap on the green microphone icon.



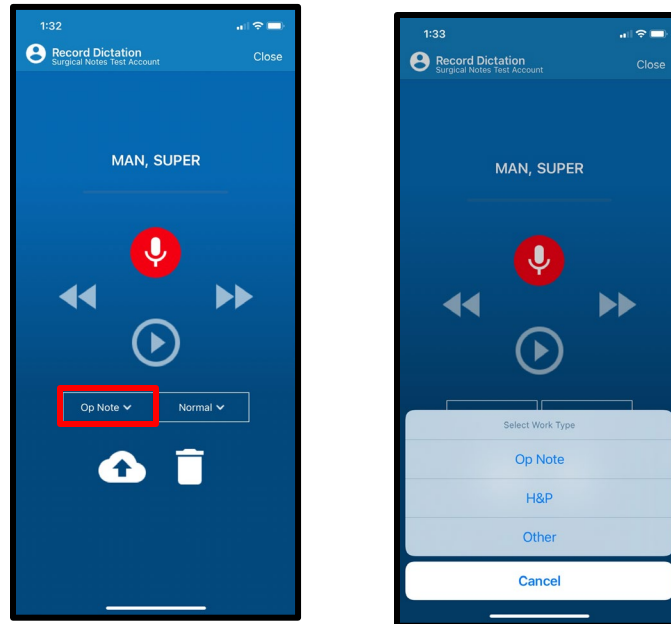
How to Select an Appointment for Dictation – Method #2

Tap on the Needs Dictation tile on the Dashboard to access a list of cases that require dictation. Swipe left on the arrow on the appointment. Then tap Record.

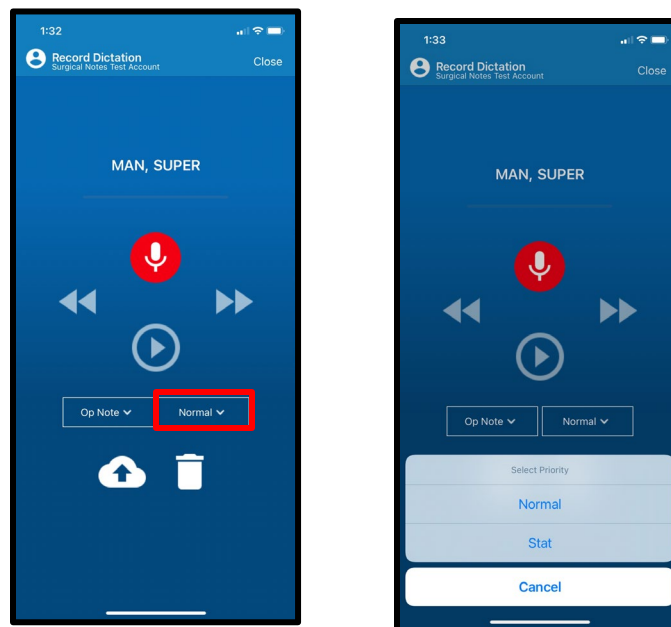


How to Select a Work Type and Priority

The work type is Op Note by default. If you are dictating a report that isn't an op note, tap on Op Note to select the appropriate work type from the Select Work Type drop-down menu.

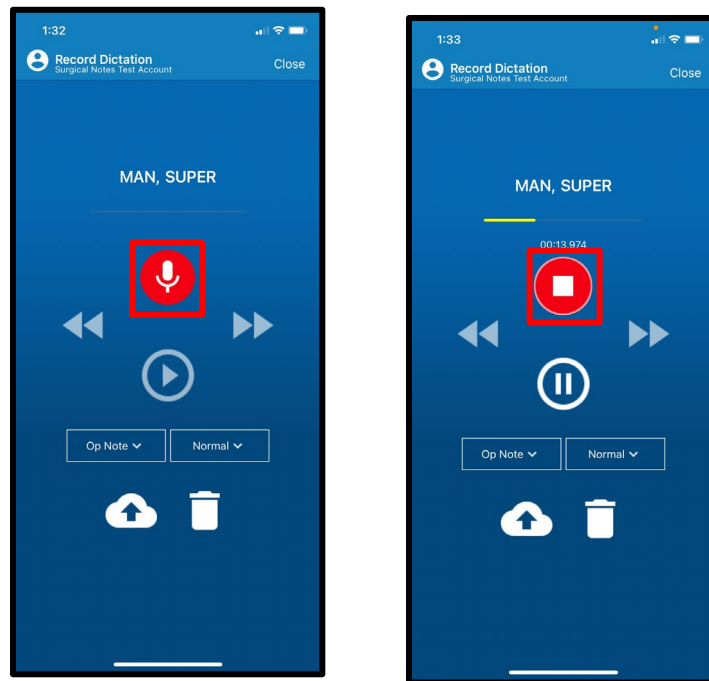


The priority is Normal by default. If the dictation needs to be typed and completed urgently, tap on Normal and select Stat from the Select Priority drop-down menu.

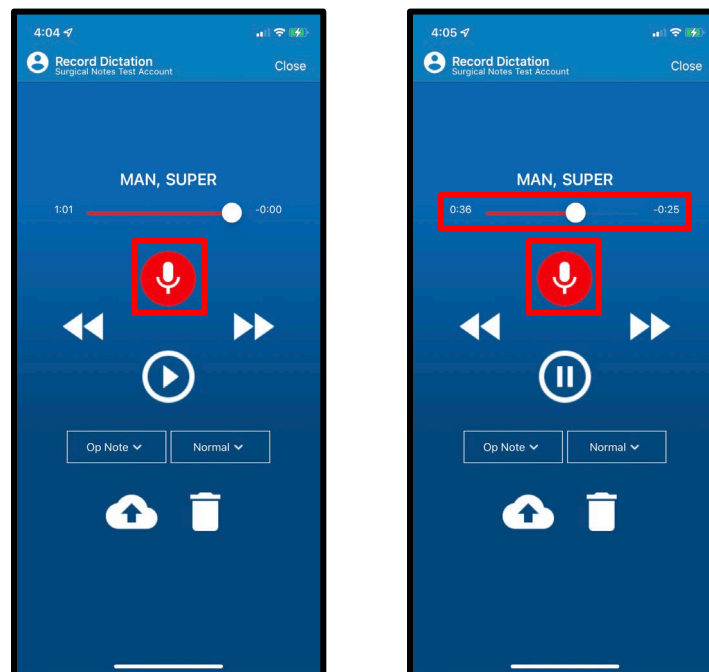


How to Record and Submit a Dictation

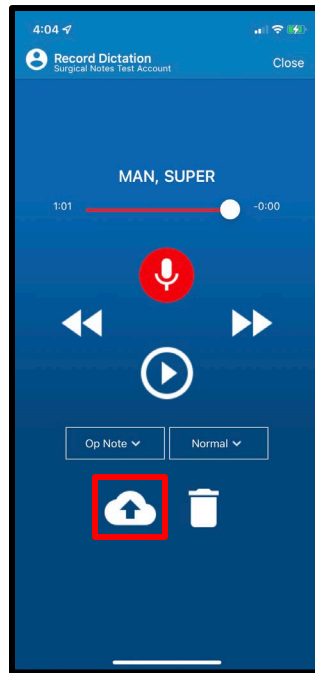
Tap on the red microphone icon to begin recording. A running timer will be displayed. When you are finished dictating, tap on the red stop button to end the recording.



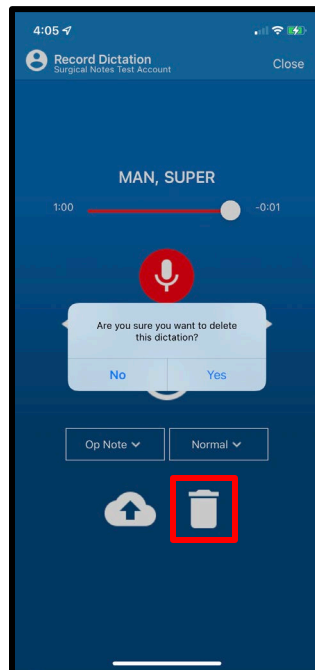
You can listen to your dictation by tapping the play button. Add to the dictation by dragging the circle on the recording bar to the desired point in the recording. Tap the red microphone icon to record and tap the red stop button to end.



To submit the dictation to Surgical Notes for transcription, tap on the cloud upload icon.



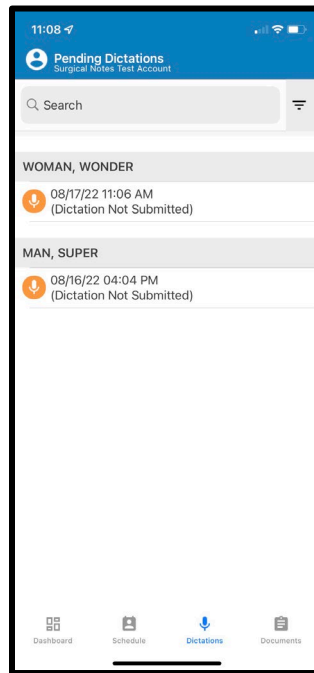
If you do not want to upload the dictation to Surgical Notes, tap on the trash can to delete the dictation.



Pending Dictations

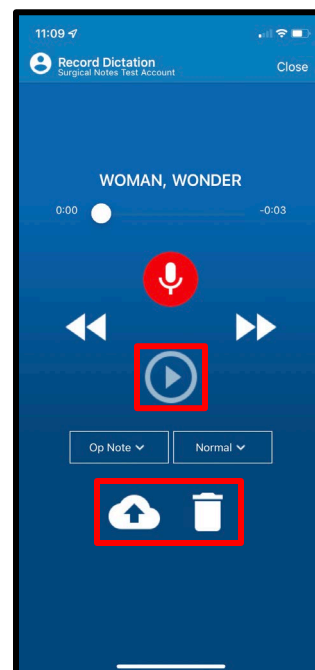
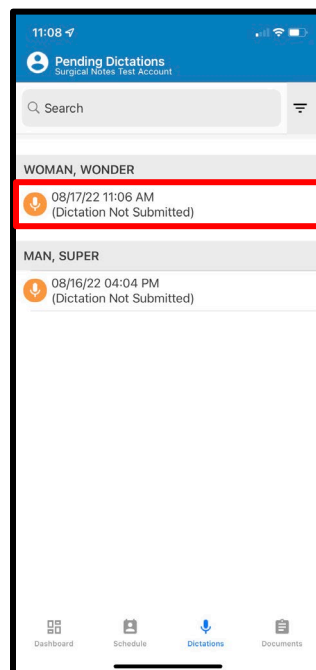
How to Access Pending Dictations

Tap Dictations on the navigation menu to access a list of dictations that have been recorded but not yet submitted to Surgical Notes. Filter the pending dictations list by patient name or patient ID by using the Search bar or adjust the date range by tapping the Filter icon.



How to Review Pending Dictations

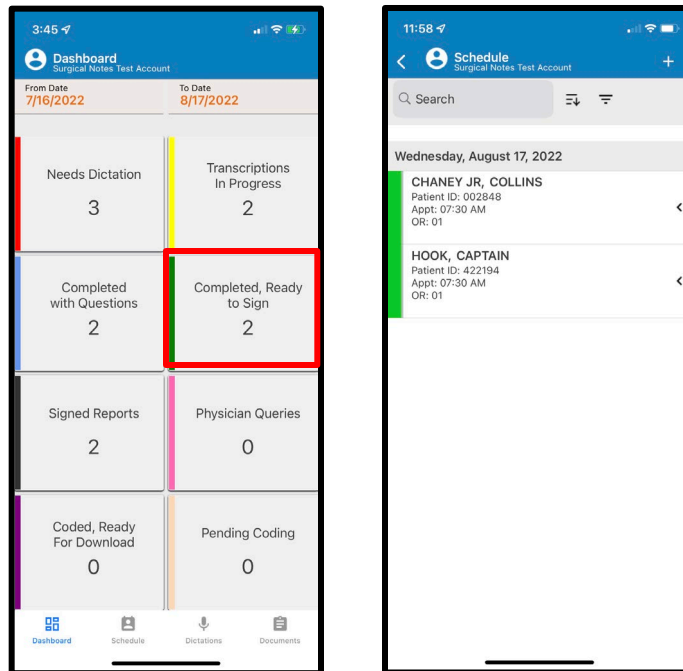
Tap on a pending dictation to review it. Tap the Play button to listen to the recording. Then either submit the dictation to Surgical Notes by tapping the cloud upload icon or delete the dictation by tapping the trash can.



Reports

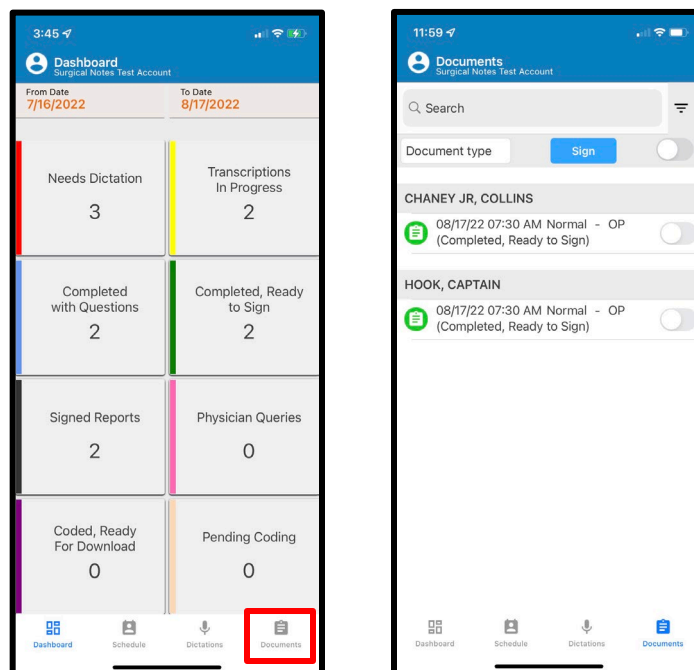
How to View a List of Completed, Ready to Sign Reports – Method #1

Tap the Completed, Ready to be Signed tile on the Dashboard to access a list of cases that have completed reports that are ready to be reviewed, edited, and signed. Filter the list by patient name or patient ID by using the Search bar or adjust the date range by tapping the Filter icon.



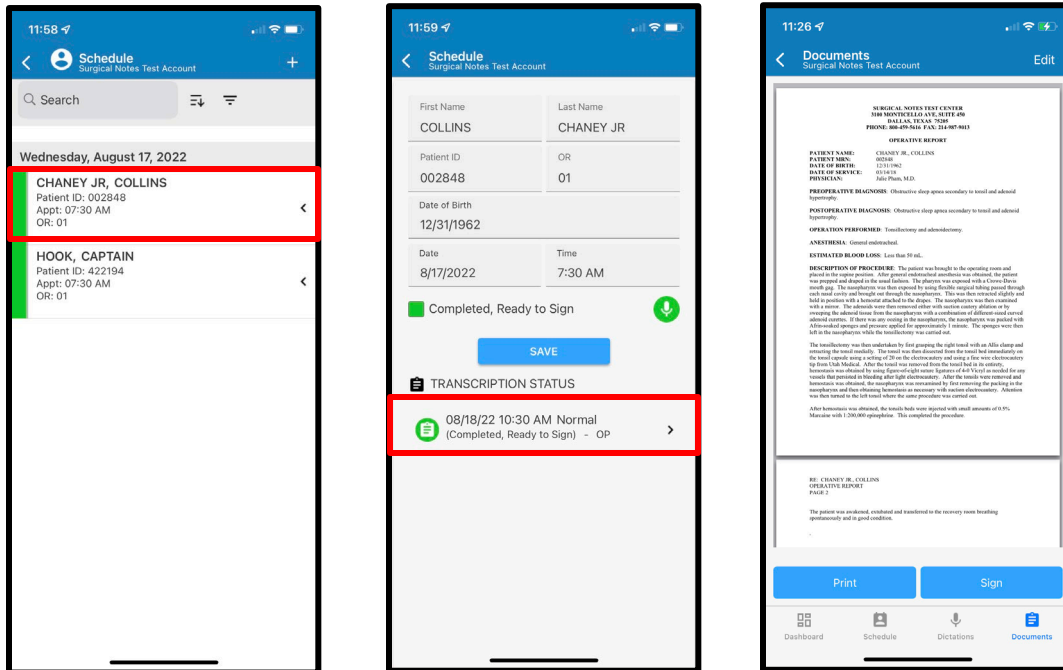
How to View a List of Completed, Ready to Sign Reports – Method #2

Tap Documents on the navigation menu. Completed, Ready to Sign reports will have the OP work type. Filter the list by patient name or patient ID by using the Search bar or adjust the date range by tapping the Filter icon.



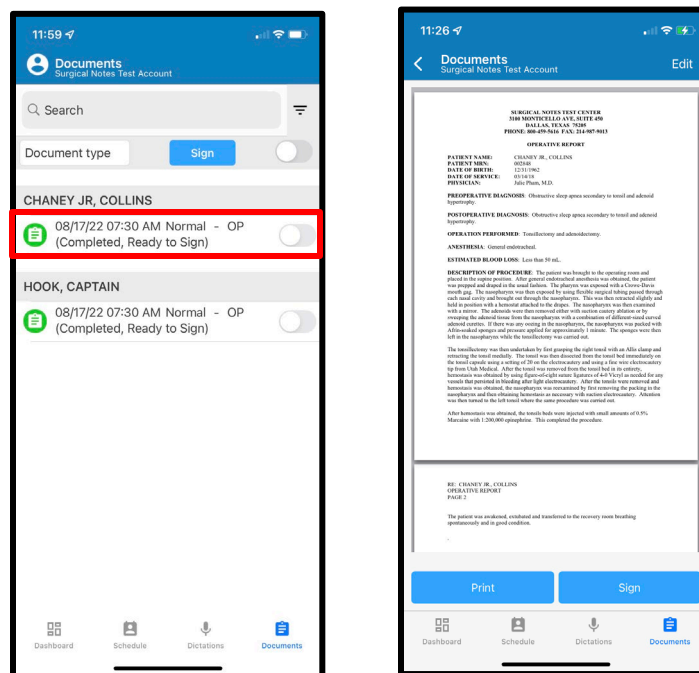
How to View a Completed, Ready to Sign Report- Method #1

Tap on the desired case. On the case detail screen, the report listing will be displayed below the patient information under TRANSCRIPTION STATUS. Tap on the report listing to view the report.



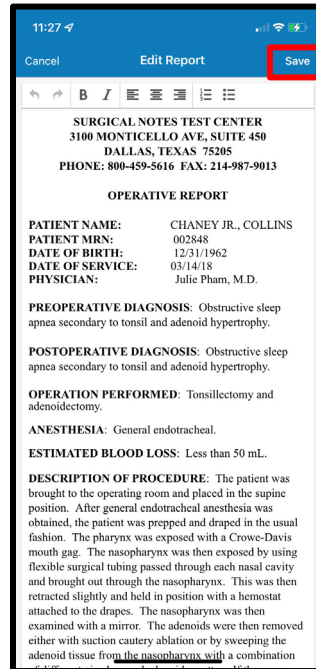
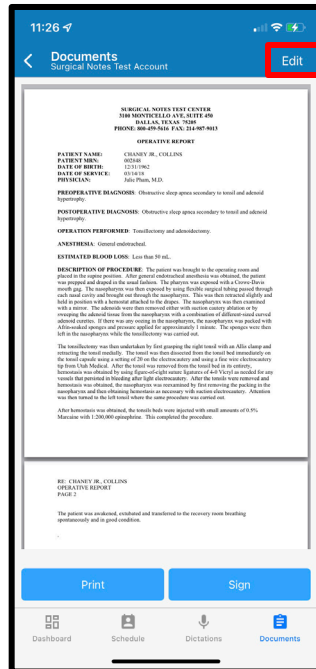
How to View a Completed, Ready to Sign Report- Method #2

Tap on the report on the Documents list.



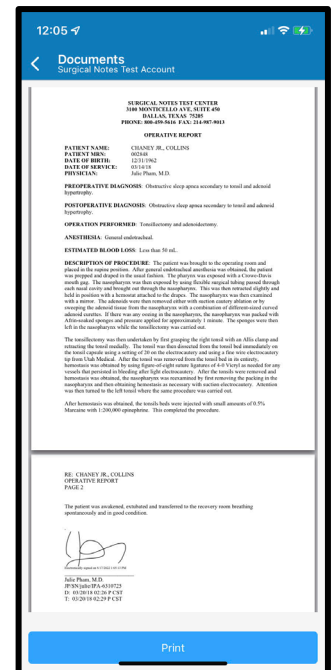
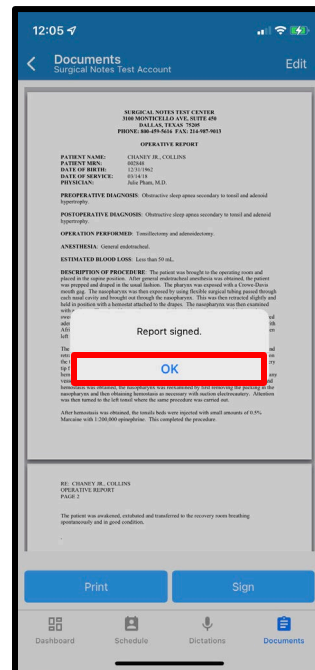
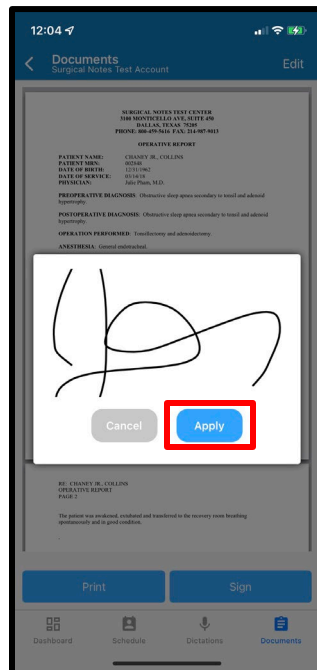
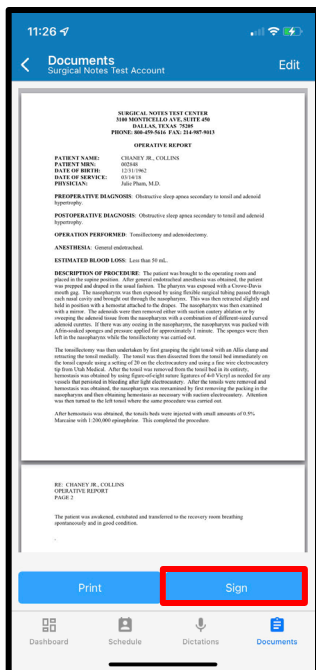
How to Edit a Report

Tap Edit to open the report in edit mode. Tap the location where you would like to edit, add, or delete text. Utilize the text editing bar to change text style, alignment, and more. When all edits are complete, tap Save to save your changes.



How to Electronically Sign a Report

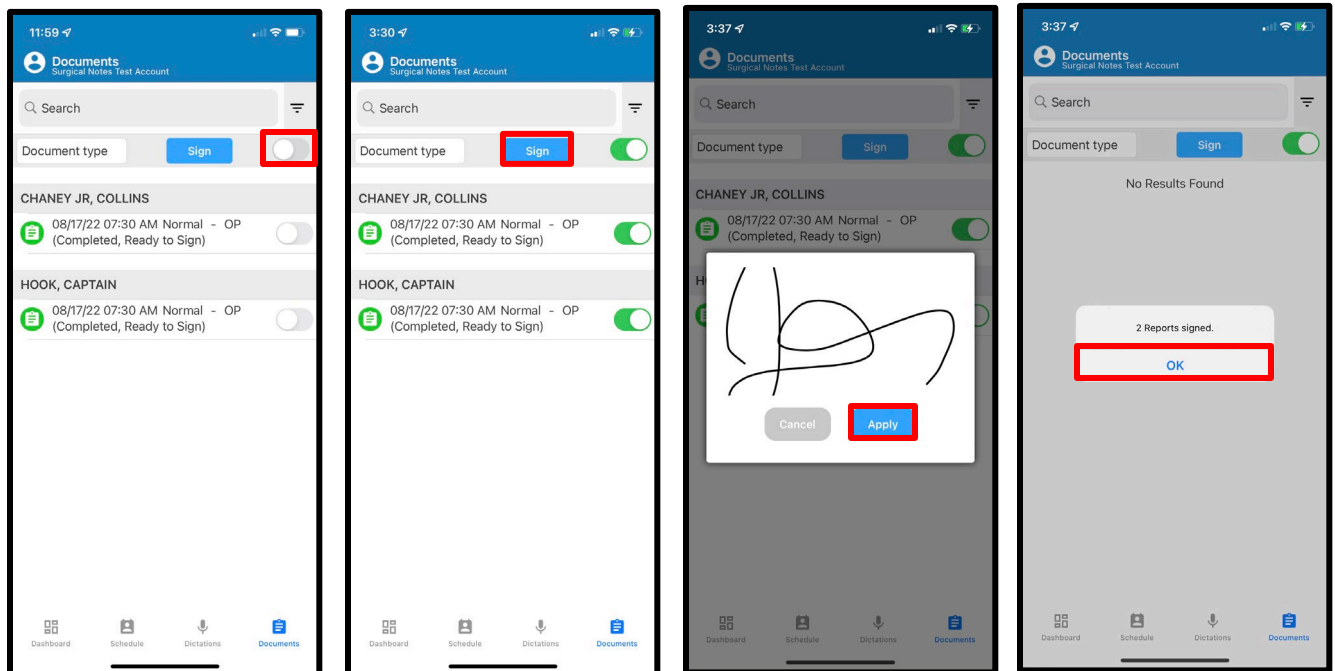
Tap the Sign button. A preview of your saved signature will pop up. Tap the Apply button to move forward with electronically signing the report. A window will pop up to confirm that the report has been signed. Tap OK.



How to Batch Sign Reports

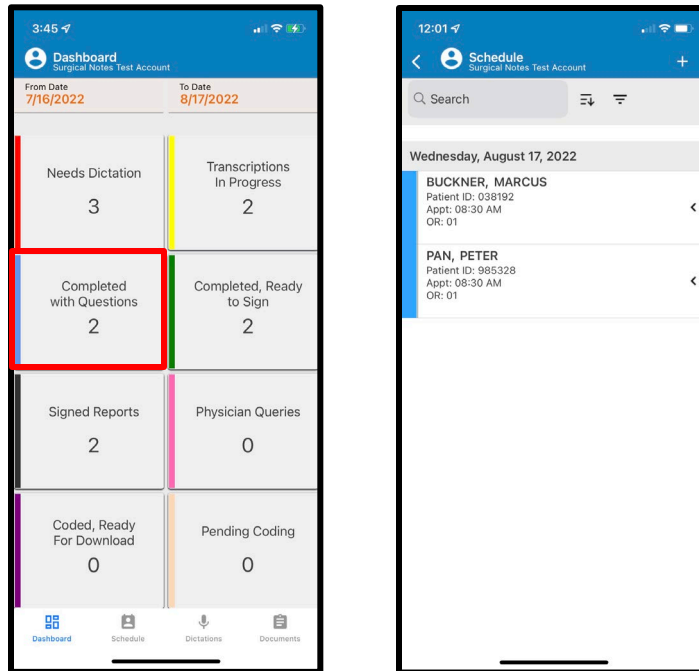
Tap Documents on the navigation menu. To sign all reports listed, tap on the switch at top right-hand corner. *Please note: If the facility uses Surgical Notes for coding, there may be physician queries listed under Documents in addition to op reports. Op reports can be identified by the OP work type while physician queries will have the PH work type.* Alternatively, you can create a custom batch of reports by tapping on the switches next to the reports you would like to sign.

Tap the Sign button. A preview of your saved signature will pop up. Tap the Apply button to move forward with electronically signing the report. A window will pop up to confirm the number of reports that have been signed. Tap OK.



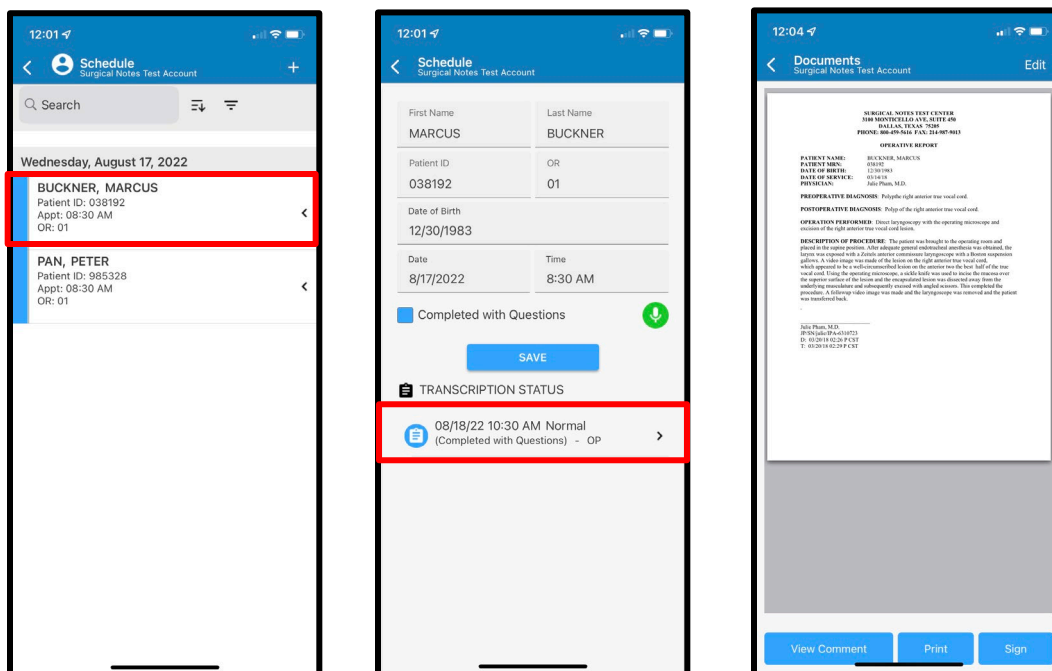
How to View a List of Completed with Questions Reports

Completed with Questions reports have been completed, but there is a question or comment about the dictation from Surgical Notes that should be reviewed before signing. Tap the Completed with Questions tile on the Dashboard to view a list of cases that have Completed with Questions reports. Filter the list by patient name or patient ID by using the Search bar or adjust the date range by tapping the Filter icon.



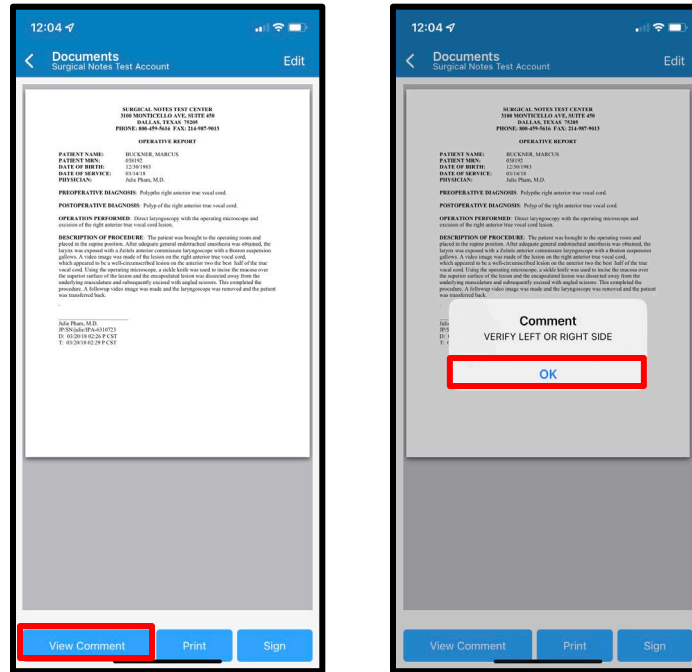
How to View a Completed with Questions Report

Tap on the desired case. On the case detail screen, the report listing will be displayed below the patient information under TRANSCRIPTION STATUS. Tap on the report listing to view the report.



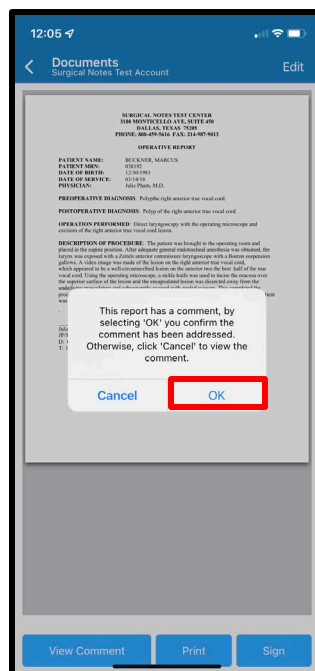
How to View and Edit a Completed with Questions Report

Tap on the View Comment button. A window will pop up with the comment or question from Surgical Notes regarding the dictation. Tap OK to close the window. Tap Edit to edit the report, if necessary.



How to Sign a Completed with Questions Report

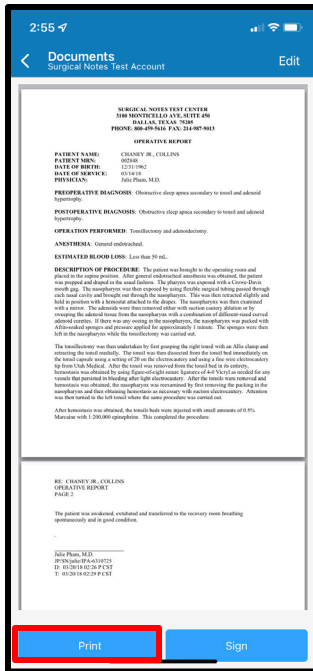
When you are done reviewing and editing the report, tap the Sign button. A pop-up message will appear to reiterate that the report has a comment from Surgical Notes. Tap OK to continue the signature process or tap Cancel to go back and continue reviewing and editing the report.



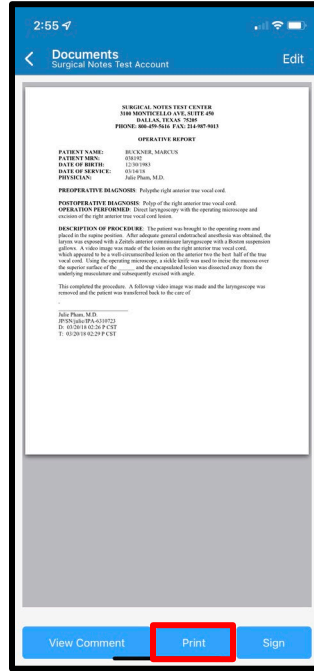
How to Print Reports

You can print any 'Completed, Ready to Sign', 'Completed with Questions', or 'Signed' report by tapping the Print button.

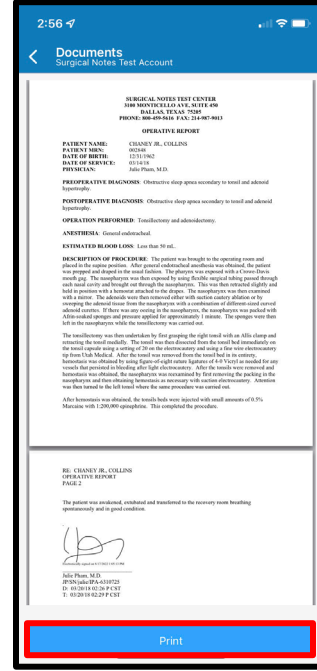
Completed, Ready to Sign



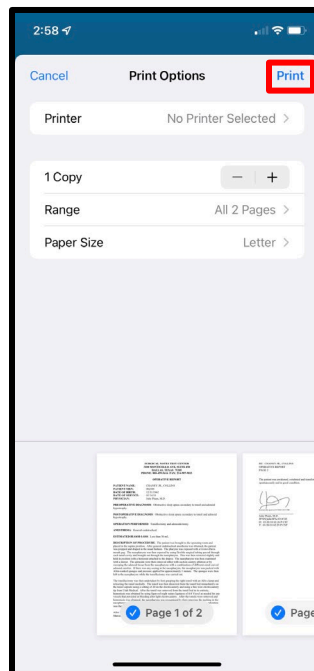
Completed with Questions



Signed



Print options will be displayed. Set your print preferences and then tap PRINT.



Physician Queries

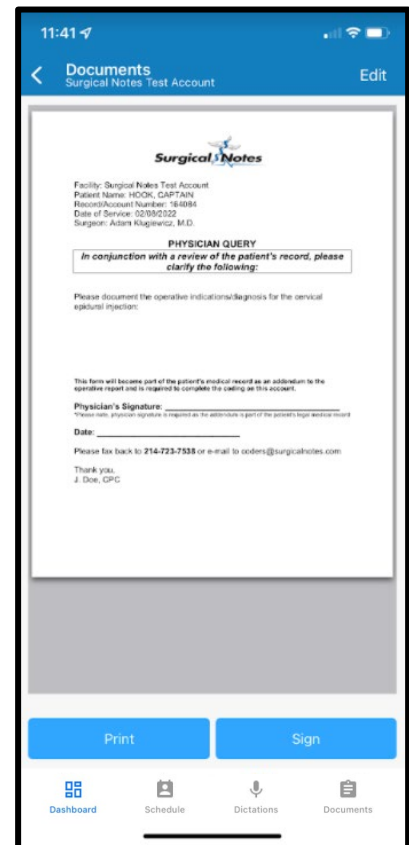
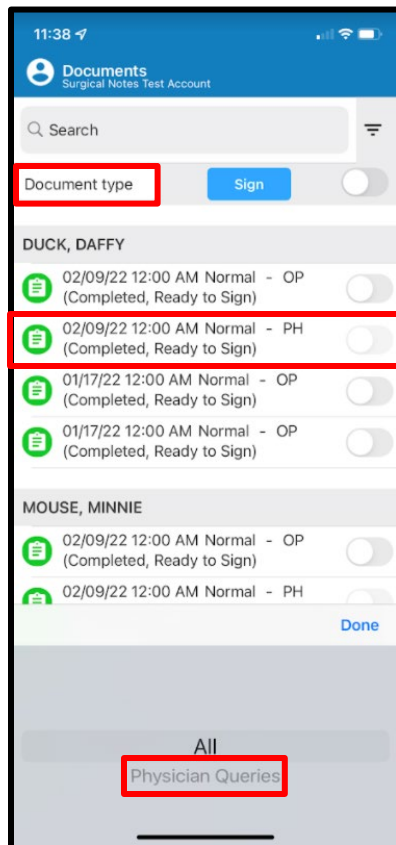
If the Surgical Notes coding team needs more information, specificity, or clarification on something in an op report to accurately determine coding, they will generate a physician query. Physician queries require input and signature from the physician for coding to be completed.

A push notification will be sent to alert you that there is a physician query that requires your input. If you do not have push notifications enabled, you can find pending physician queries by tapping the Documents icon and changing the Document type to Physician Queries.

Tap on a physician query (indicated by the PH work type) to view it. The query will be in either multiple choice or free text format. Tap Edit to provide the required information. Then tap the Sign button. Once signed, the physician query will be sent to the Surgical Notes coding team to complete the coding, and the physician query will drop off your Documents list.

Multiple choice

Free text



Troubleshooting

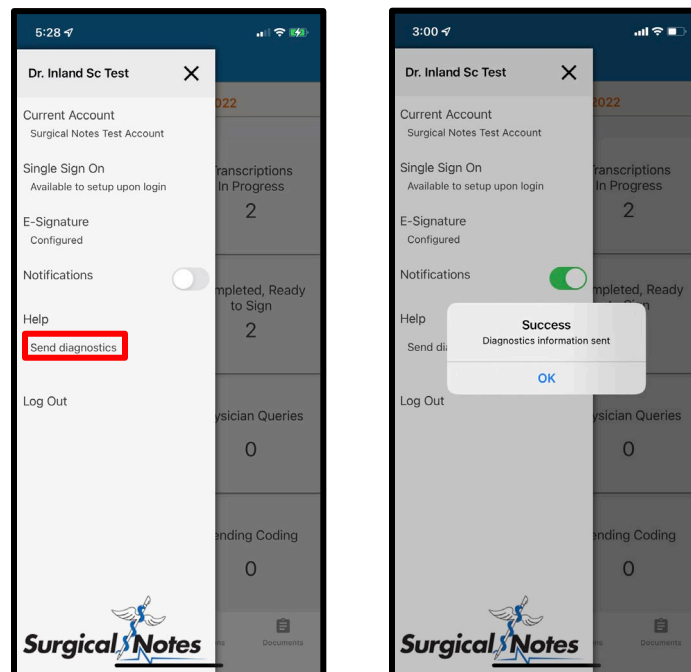
How to Contact Surgical Notes for Support

For immediate assistance, call the office at 800-459-5616. For non-urgent matters, email the client support specialists at acctmgrs@surgicalnotes.com. Emails are monitored from 5:00 AM CT to 7:00 PM CT Monday-Thursday and 5:00 AM CT to 6:00 PM CT on Friday. Emails will be responded to within 24 hours.

How to Send Diagnostic Information to Surgical Notes

The Send diagnostics link sends important information about your device (e.g., Android vs iOS, device manufacturer carrier, etc.) to the Surgical Notes team to assist with troubleshooting any issues you may be experiencing with the mobile app. If a Surgical Notes team member asks you to send diagnostics, please complete the following steps.

Tap the User icon at the top left of the screen to display the User App Menu. Then tap Send diagnostics. A window will pop up confirming that your diagnostics information was sent.



Frequently Asked Questions

General

1. Why does the app look different today?
 - a. You likely have automatic updates enabled on your mobile device and our most recent app update was downloaded and installed.
2. Is there a cost to download and use the app?
 - a. No, this is included as part of contracted services. This is just another way for us to help improve our service to you.
3. Do I need an automated scheduling feed sync to use the app?
 - a. While the app allows you to manually add patient visits, we highly recommend an automated scheduling feed sync to increase the overall user experience. If you are interested, please contact your Account Manager for more details.
4. I have a transcription schedule sync/feed enabled, but I don't see a specific patient. What can I do?
 - a. First, refresh the schedule on your screen by pulling down from the top of the schedule. If the patient is still not on the Schedule, contact your Surgical Notes Account Manager to verify you are set up and configured correctly.
5. Are the credentials (username and password) for the mobile app the same for SNChart.com?
 - a. Yes.
6. Does a physician need to be set up to dictate by Surgical Notes before using the mobile app?
 - a. Yes. Surgical Notes will add the physician to the system and assign a dictator ID.
7. Is the application HIPAA-compliant?
 - a. Yes. We followed widely accepted industry best practices in the development of our new app to include many security controls. We have also tested our app extensively using the industry leading application security testing platform, Veracode. All electronic protected health information (PHI) is encrypted while in motion and at rest, and we have other security controls that are built into our app such as inactivity timeouts, unique logins, logging, and more.
8. What is the inactivity timeout set to?
 - a. 10 minutes for all users. Time taken towards dictating/recording does not count towards this timeout or idle time.
9. Why is the inactivity timeout value set to 10 minutes?

- a. HIPAA requires an electronic session timeout after a predetermined time of inactivity. Based on several industry studies and other similar apps in the market, we believe 10 minutes offers a good balance between usability and security for our customers.
10. Does this app only work with a Wi-Fi connection?
- a. No. This app works with both cellular and Wi-Fi connections. Standard data charges from carriers will apply when uploading dictations for transcription.
11. I am unable to log in to the app and do not see a login option. What should I do?
- a. Use of the application requires that you set a PIN/passcode on your device for security reasons and to align with HIPAA compliance best practices.

Schedule

12. What is the default time period that is displayed for my schedule?
- a. The schedule defaults to displaying all appointments that are 60 days in the past from today's date and 14 days in the future.
13. How can I refresh the schedule?
- a. From the schedule view, refresh by pulling down (push, hold, move finger down, and release) on the list of appointments.

Dictation

14. Can I use other apps on my device while recording a dictation (e.g., multi-tasking)?
- a. Yes. Once you begin a recording, you can toggle to another app on your phone while recording. Navigate back to the app and tap the pause button to end the recording.
15. Can I accept an incoming call while recording a dictation?
- a. Yes. If you receive a call while recording, you can accept it without losing the recording. Upon accepting the call, the recording will pause. Navigate back to the app and tap the red microphone icon to resume your recording.
16. Can I view pending dictations (recorded but not yet submitted) from any device?
- a. No. You can only view recorded dictations that have not been submitted on the original device in which the recording was captured. In other words, you cannot view recorded (but not submitted) dictations captured on your iPhone while using the app on your iPad (or separate device).

Report Editing

17. Can I edit reports on my smartphone or tablet?

- a. Yes. We support the editing of reports on any device.
18. Can I edit a signed report?
- a. No, for legal reasons you cannot. Contact your Surgical Notes Account Manager for assistance.
19. Why is the font different when editing a report?
- a. The font is standardized across all reports when editing a report. However, when the report is saved, it will revert to the original font.

Electronic Signature

20. How can I re-submit my signature that is on file (e.g., I don't like my previously saved signature image)?
- a. Contact your Surgical Notes Account Manager and ask for the image to be removed. This will reset the process and prompt you with the Electronic Signature Consent form within the app.
21. Can I use Touch ID or fingerprint scanning to log in and sign reports?
- a. Yes, you can use them to log in. However, you cannot currently sign reports that way.
22. I see that a report is completed, but it is missing from my Documents screen. Where is it?
- a. The report likely has the status 'Completed with Questions', and these reports do not show up in the Documents screen. This helps ensure that the questions are read, and the report is edited, if needed, before signing.