

Finance Deskto\$



User's Guide
Version 4.0

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About Vianeta Voice Express

Vianeta Voice Express is a new system for managing the entire life cycle of dictation and transcription, from recording to reporting and everything in between. Vianeta Voice Express gives MTSOs the ability to centrally manage any number of transcriptionists from a single PC, while customizable routing functions help to streamline workflow and improve accuracy. Transcriptionists get the ability to work from home (or anywhere else that has an Internet-capable PC) as well as compatibility with most game port-based foot pedals and most word expansion software.

Vianeta Voice Express leverages the Internet by allowing you to download dictation audio and upload completed reports to Vianeta servers. However, you do not have to be connected to the Internet while you are actually transcribing reports.

We have designed Vianeta Voice Express to be as intuitive as possible; if you are already familiar with the Windows environment and the interface offered by applications such as Microsoft Word, you should have little trouble in learning how to use Vianeta Voice Express. This manual should have all of the information that you need. If you find any incorrect or missing information, please contact us by Email at Documentation@vianeta.com. Thanks for using Vianeta Voice Express!

Initial Setup

Topics covered in this chapter include:

- “Initial Setup” on page 3
- “Billing Scripts” on page 4
- “Site Groups” on page 7
- “Site Pools” on page 9
- “User Groups” on page 11
- “User Pools” on page 14






Initial Setup

To begin using Finance Desktop, first create a Financial User in the Users screen of Vianeta Transcription Desktop. You must contact Vianeta to activate Finance Desktop.

As a Financial User, connect to the Internet, launch the Vianeta Transcription Desktop application, and log in using the new user name and password that has been assigned for use with Finance Desktop. You may be asked whether or not to install and run Active X controls or other software created by Vianeta or Microsoft. Click **Yes** or **OK**, and restart your system if prompted.

Note: Unlike in Transcription Desktop, there is no disconnected mode for Finance Desktop. Your computer must remain connected to the Internet while you are using Finance Desktop.

Log in to Vianeta Transcription Desktop using your new Financial User ID and password. Click on the **Billing Setup** tab in the Navigation Bar. A list of components is displayed:

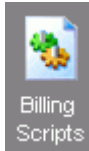
Billing	
Billing Setup	
 Billing Scripts	Billing Scripts - Create rules for payment calculations.
 Site Groups	Site Groups - Create groups of Physicians.
 Site Pools	Site Pools - Associates Site Groups with Billing Scripts.
 User Groups	User Groups - Create groups of Transcriptionists.
 User Pools	User Pools - Associates User Groups with Billing Scripts.

Note: When creating Billing Scripts, User Groups, User Pools, Site Groups, and Site Pools you **MUST** notify Vianeta to start the process of billing. Billing data for any report transcribed or dictated by a user not part of any of the groups will not be archived. To retrieve this information, please contact your Vianeta Representative.

Billing Scripts

Begin by setting up **Billing Scripts**, which are rules for payment calculation.

The Billing Scripts created here will be associated with groups of your transcriptionists to whom you owe money as well as with dictating physicians (Hospitals, Clinics, etc.) who pay you. To create a Billing Script, click on the **Billing Scripts** icon in the Navigation Bar:



This displays the current listing of Billing Scripts, including the name of the script, the Script Type, and the creator of the script:

Billing Scripts		Demo Billing	
<u>Sno</u>	<u>Billing Script</u>	<u>Billing Script Type</u>	<u>Creator</u>
1	Senior MT	Line Pricing	dbilling
2	Junior MT	Line Pricing	dbilling
3	Junior MT	Word Pricing	dbilling
4	New MT	Line Pricing	dbilling
5	Senior MT	Word Pricing	dbilling
6	New MT	Word Pricing	dbilling

<< Prev Page Next Page >> Add New Modify

Next, click on the **Add New** button that appears on the screen. This launches the **Add Billing Script** dialog:

Add Billing Script
Enter the following information for the Billing Script

Billing Script Information
Note: *Means Mandatory Field

Script Name: *

Script Description:

Script Type: *

Count:

Include Header & Footer

Count Type:
 Bold
 Italic
 Underline
 Space
 Tab
 Capital
 Double Key Stroke

Define Count:

Amount(\$): *

Finish **Cancel**

Make sure that you enter information into the fields in order from top to bottom, as the contents of certain fields will change according to what you select in other fields. For example, if you change “Script Type” to “Word Pricing,” the options in the “Define Count” menu change to reflect this.

- **Script Name:** Enter a name for this script.
- **Script Description:** Describe what this script will be used for; this info is purely for your own reference later.
- **Script Type:** Select the criteria that you want this script to use. Options are Line Pricing, Word Pricing, and File Size. The File Size option lets you enter an amount to charge/pay on a per byte basis.
- **Count:** Select the type of count you want for your selected Script Type. By default this is set to **Character Count**. If the Gross Line Count feature is enabled (must be enabled by Vianeta), a Count type called **Gross Line Count** will be present in the Count pull-down menu. Selecting Gross Line Count allows billing by number of lines, even if the last line in a paragraph only has one word, for example.
- **Count Type:** Select the elements that should be included in the character count. Control-click or Shift-click to select multiple elements. (Used when Character Count is selected for Count)
- **Define Count:** Set the definition of a line or word.

-
-
- **Amount:** Enter the amount to charge for the count method you have selected.

Note: A red asterisk (*) indicates a mandatory field.

Clicking on **Finish** will cause the new Script to be added to the list. Double-click on the list entry to modify it, make it inactive, or delete it. The **Add New** and **Modify** options can also be accessed by right-clicking on the appropriate list entry.

If the Billing Script you created is for payment of transcriptionists, skip ahead to the section entitled “User Groups” on page 11. If your Billing Script is for billing of clients, continue on to the next section entitled “Site Groups” on page 7.

Tutorial—Creating Billing Scripts

You will create Billing Scripts for your transcriptionists in exactly the same way that you created them for your clients. Go ahead and create at least one Billing Script that describes how you pay a transcriptionist or (more likely) a group of transcriptionists who are paid identically. As an example, you might have a Billing Script named “Transcriptionists” that defines how much per line or character you are paying some of your transcriptionists. You would then go on to group together all of your transcriptionists that are paid in this way, and associate that group with the Billing Script. You could also create a Billing Script called “Mercy Hospital” that defines how you bill Mercy Hospital, and then go on to associate that script with Mercy Hospital.

Site Groups

A **Site Group** is a group of physicians who are billed according to the same criteria. Choose the **Site Groups** icon from the Navigation Bar.



This displays the current listing of Site Groups, including Site Group name, Site, Site Location, and creator:

Site Groups		Demo Billing		
Sno	Site Group Name	Site	Site Location	Creator
1	MMC	Memorial Medical Center	Brown Memorial Center	dbilling
2	RMC	Regional Medical Center	Cardiology Center	dbilling

<< Prev Page Next Page >> Add New Modify

Next, click on the **Add New** button that appears on the screen. This launches the **Add Site Group** dialog:

Add Site Group [X]

Enter the following information for the Site Group

Site Group Information

Note: *Means Mandatory Field

Group Name: *

Group Description:

Site Information

Site Name:

Site Location:

Physicians: *

- Please choose from below
- Select ALL
- Dennis Nikko
- Joel Scotch
- John Baily
- Victor Watson

Finish Cancel

Enter information into the fields in order from top to bottom.

-
-
- **Group Name:** Enter a name for this Group.
 - **Group Description:** Describe what this Group will be used for; this info is purely for your own reference later.
 - **Site Name:** Select the Site from which to select Physicians.
 - **Site Location:** Select the Location from which to select Physicians.
 - **Physicians:** Select the Physicians that will be included in the group.

You must first select the Site Name, then the Site Location, then finally the Physicians that you want included. You can select multiple physicians from the list on the right by holding down the CTRL key as you click on the names. You can hold down the SHIFT key as you select the names to select several physicians at once. Choosing **Select All** will not only select all physicians who appear in the list, but also will automatically update new physicians added through Vianeta Voice Express. Click on **Finish** and the Site Group will appear on the list and can be modified by double-clicking on the list entry.

Note: A red asterisk (*) indicates a mandatory field.

Note: After a Physician is included in one Site Group, that Physician will be removed from the list, so that Physician cannot accidentally be included in another Site Group. If Physicians were included in multiple Site Groups, the system would bill them twice for the same work.

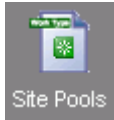
Tutorial—Setting Up Site Groups

Before continuing, finish creating your remaining Site Groups.

The next step is to associate your new Site Group with the Billing Script that was created earlier. Do this by clicking on **Site Pools** in the Navigation Bar.

Site Pools

A **Site Pool** associates each Site Group with a Billing Script. To create a Site Pool click on the **Site Pools** icon in the Navigation Bar.



This displays the current listing of Site Pools, including Site Pool name, Site Group name, and Billing Script:

Site Pools		Demo Billing	
Sno	Site Pool Name	Site Group Name	Billing Script
1	RMCgeneral	RMC	Senior MT
2	MMCradio	MMC	Senior MT

<< Prev Page Next Page >> Add New Modify

Next, click on the **Add New** button that appears on the screen. This launches the **Add Site Pool** dialog:

Add Site Pool [X]

Enter the following information for the Site Pool

Site Pool Information

Note: *Means Mandatory Field

Pool Name: *

Pool Description:

Group Name: *

Script Name: *

Finish Cancel

Enter information into the fields in order:

- **Pool Name:** Create a name for this Pool.
- **Pool Description:** Describe this pool; this information is purely for your own reference.
- **Group Name:** Select that Group that will be included in this Pool.
- **Script Name:** Select the Script that should be associated with the Group you chose above.

Note: A red asterisk (*) indicates a mandatory field.

Each Site Group may only be associated with one Billing Script, so Site Groups that have already been made a part of a Site Pool will not show up in the list. Click on **Finish**. The Site Pool will show up in the list and can be modified, made inactive, or deleted by double-clicking on its list entry.

Tutorial—Setting Up Clients

You have now set up everything you need to use bill your first clients. Go ahead and set up all of your clients in this manner then return here to set up the system for payment of your transcriptionists.

User Groups

Just as you previously created a group of physicians who are billed in the same way, you will now create groups of transcriptionists that are paid in the same way—**User Groups**. Click on **User Groups** icon in the Navigation Bar.



This displays a listing of the current User Groups, including User Group name and creator:

User Groups		Demo Billing	
Sno	User Group Name	Creator	
1	MMCGroupRadio	dbilling	
2	RMCGroupMain	dbilling	
3	MMCMailGroup	dbilling	

<< Prev Page Next Page >> **Add New** **Modify**

Next, click on the **Add New** button that appears on the screen. This launches the **Add User Group** dialog:

Fill out each field in order.

- **Group Name:** Enter a name for the group.
- **Group Description:** Enter a description for the group. This is for your own reference only.
- **Users:** Select the Transcriptionists to place in this group.

Select an employee from the list on the right and click on **Add** to move the name to the list on the left. To remove an employee from the User Group, select the employee name from the list on the left and click on **Remove** to move the name to the list on the right. After an employee is made part of a User Group, his/her name will disappear from the list, so an employee is not accidentally made part of more than one User Group. If an employee was part of more than one user group, the system would pay them twice for the same work. Select multiple employees by holding down the CTRL key while clicking, or select several at once by holding down the SHIFT key while clicking.

Note: A red asterisk (*) indicates a mandatory field.

Note: Deleting a user in Vianeta Voice Express does not remove that user from the User Group. This is in order to insure that all users are paid for all the work that they complete. Once certain that the user has been paid in full, log in to Vianeta Voice Express Billing and remove that user from the User Group.

Click on **Finish**. The new User Group will appear in the list and become available for modification or deletion by double-clicking on it.

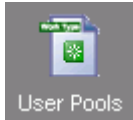
Tutorial—Setting Up Groups of Transcriptionists

Go ahead and set up the rest of the groups of Transcriptionists now.

The next step is to associate each of your User Groups with a Billing Script by creating User Pools.

User Pools

Creating a **User Pool** is the same process as creating a Site Pool. Click on the **User Pools** icon in the Navigation Bar.



This displays the listing of current User Pools, including User Pool name, User Group name, and Billing Script:

User Pools		Demo Billing	
Sno	User Pool Name	User Group Name	Billing Script
1	RMCMainPool	RMCGroupMain	Senior MT
2	MMC1Pool	MMCGroupRadio	Senior MT
3	MMCMainNWPool	MMCMainGroup	Senior MT

<< Prev Page Next Page >> **Add New** **Modify**

Next, click on the **Add New** button that appears on the screen. This launches the **Add User Pool** dialog:

Add User Pool [X]

Enter the following information for the User Pool

User Pool Information

Note: *Means Mandatory Field

Pool Name: *

Pool Description:

Group Name: *

Billing Script Name: *

Finish **Cancel**

Fill out each field in order and select the User Group to associate with a certain Billing Script Name. Make sure Billing Scripts have been created for the transcriptionists. After a User Group is made a part of a User Pool it will no longer be listed in this screen in order to prevent users from accidentally including a User Group in more than one User Pool.

-
-
- **Pool Name:** Enter a name for the User Pool.
 - **Pool Description:** Enter a description for the User Pool. This information is purely for your own reference.
 - **Group Name:** Select the Group of Users to include in the User Pool.
 - **Billing Script Name:** Select the Billing Script to apply to the User Pool.

Note: A red asterisk (*) indicates a mandatory field.

Tutorial—Finishing Up

This concludes the setup procedure for your users. Go back and create all of the Billing Scripts, User Groups, and User Pools that you need. Next, refer to “Billing Reports” on page 17 to learn how to actually use Vianeta Voice Express Billing on a day-to-day basis.

CHAPTER 2


Billing Reports

Topics covered in this chapter include:

- “Billing Reports” on page 17
- “User Report” on page 18
- “Site Report” on page 20

Billing Reports

Log in to Vianeta Desktop using your Financial User ID and password. To run Billing Reports, click on the **Billing** tab in the Navigation Bar. A list of components is displayed:

 <p>The image shows a vertical navigation menu with a grey background. At the top is a tab labeled "Billing". Below it are two items: "User Report" with an icon of three stylized human figures in green, blue, and orange, and "Site Report" with an icon of three white buildings with yellow windows.</p>	<p>User Report - A report showing users and line counts/amounts.</p> <p>Site Report - A report showing sites and amounts owed.</p>
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User Report


Once the system knows how each Transcriptionist should be paid, click on the **Billing** tab in the Navigation Bar and then click on the **User Report** icon:

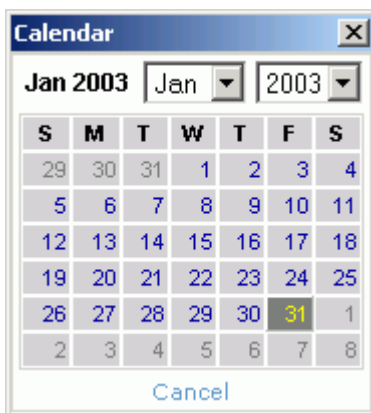


A list of each user who has been made part of a User Pool that is associated with a Billing Script is displayed. The User Report will also show the user's first name, last name, user name, billing script to which that user is assigned, the count and amount for the specified date range, and the group with which that user is associated:


User Report						Finance Super		
From Date:	4/01/2001	End Date:	4/30/2001	GO	Date is current as of 5/23/2001 4:57:00 PM PST			
Sno	First Name	Last Name	User Name	Billing Script	Count	Amount (€)	Group Name	
1	Sherly	Jones	sjones	Payroll	0	0.00	sjones	
2	Karen	Summers	ksummers	Payroll	0	0.00	ksummers	
3	Marianne	Blockley	mblockley	Payroll	8797	1319.55	mblockley	
4	Tamara	Leary	tleary	Payroll	186	27.90	tleary	
5	Anna	Smith	asmith	Payroll	3183	477.45	asmith	
6	Kim	Bowditch	kbowditch	Payroll	542	81.30	kbowditch	
7	Melissa	Durant	mdurant	Payroll	0	0.00	mdurant	
8	Nancy	Haste	nhaste	Payroll	274	41.10	nhaste	
9	Janice	Mitchell	jmtchell	Payroll	20619	3092.85	jmtchell	
10	Shannon	Dobbes	sdobbes	Payroll	15006	2250.90	sdobbes	

Total Count: 48607
Total Value: \$7291.05

To change the date ranges for the information that is shown, click on the calendar icon () next to each date. This displays the calendar:



Select a new date, and close the window by clicking on the 'X' in the upper-right corner of the dialog. Use the drop down lists to select month and year then click on the date.

Once both dates are adjusted, click on the **Go** button () to the right of the end date calendar icon, and the information in the table will change to reflect the new dates that you have chosen.



User Report Demo Billing

From Date: 01/01/2003 * End Date: 01/31/2003 * GO Data is current as of 1/31/2003

2:12:46 PM PST

From the User Report screen you may download a CSV format User Report for each user to a local hard drive. This report shows the details of that user's work for the selected date range. Click on the user for whom you want a report and then click on the **Download** button. A window appears, allowing you to select where on the hard drive to save the file. Several different programs, including Microsoft Excel, can open the file.

Note: If a change is made to a Billing Script (for example, if an employee receives a raise), the change will apply for work done after the Billing Script change, meaning it will not be retroactive.

Site Report

To calculate what your clients owe you, click on the **Site Report** icon in the Navigation Bar:



This will bring up a list of all Sites that are associated with a Billing Script, and show the count and amount owed information:

Site Report		Finance Super
From Date:	4/01/2001	End Date: 4/30/2001
		GO
		Data is current as of 5/23/2001 4:57:00 PM PST
Sno	Site	Amount (\$)
1	Vianeta Hospital	48.68
2	Training Center	0.00
3	DAISY HOSPITAL	401.21
4	Dog Hospital	0.00
5	St Agnes Hospital	0.00
6	St. Kim	0.00
7	Warren County Hospital	76.20
8	Thompson Hospital System	0.00
9	Community Medical Center	0.00
10	Kaiser	0.00

Total Value: \$526.09

Double-click on entries for Sites in this list to bring up a new list showing the count and amount breakdown by Site Group:


Site Report - Regional		Demo Billing			
From Date:	12/01/2002	End Date:	12/31/2002		
		GO	Data is current as of		
			1/31/2003 2:12:46 PM PST		
Sno	Group Name	Site Location	Billing Script	Count	Amount (\$)
1	RMC	Cardiology Center	Senior MT	0	0.00

Total Count: 0
Total Value: \$0.00

Further, double-clicking on a Site Group will bring up a new list showing the count and amount breakdown by physician.



To go back, click on **Site Report** in the Navigation Bar again.

To change the date ranges for the information that is shown, click on the calendar icon next to each date, select a new date, and close the window. Once you have adjusted both dates click on the **Go** button ()

to the right of the End Date calendar icon, and the information in the table will change to reflect the new dates that you have chosen.

The screenshot shows a web interface for 'Site Report - Regional Medical Center' with a sub-header 'Demo Billing'. Below the header, there are two date selection fields: 'From Date: 01/01/2003' and 'End Date: 01/31/2003'. Each field has a calendar icon and an asterisk. To the right of the 'End Date' field is a 'GO' button. Below the date fields, the text 'Data is current as of 1/31/2003 2:12:46 PM PST' is displayed.

From the Site Report screen it is possible to download a CSV format Site Report for each Site to a local hard drive. This shows the details of that Site's billing information for the selected date range. Click on the Site or Site Location for which a report is desired and then click on the **Download** button. A window will appear that allows you to select where on the hard drive to save the file. Several different programs, including Microsoft Excel, can open the file.

Note: If a change is made to a Billing Script (for example, if the price is raised for one of your clients), the change will apply for work done after the script change, meaning it will not be retroactive.