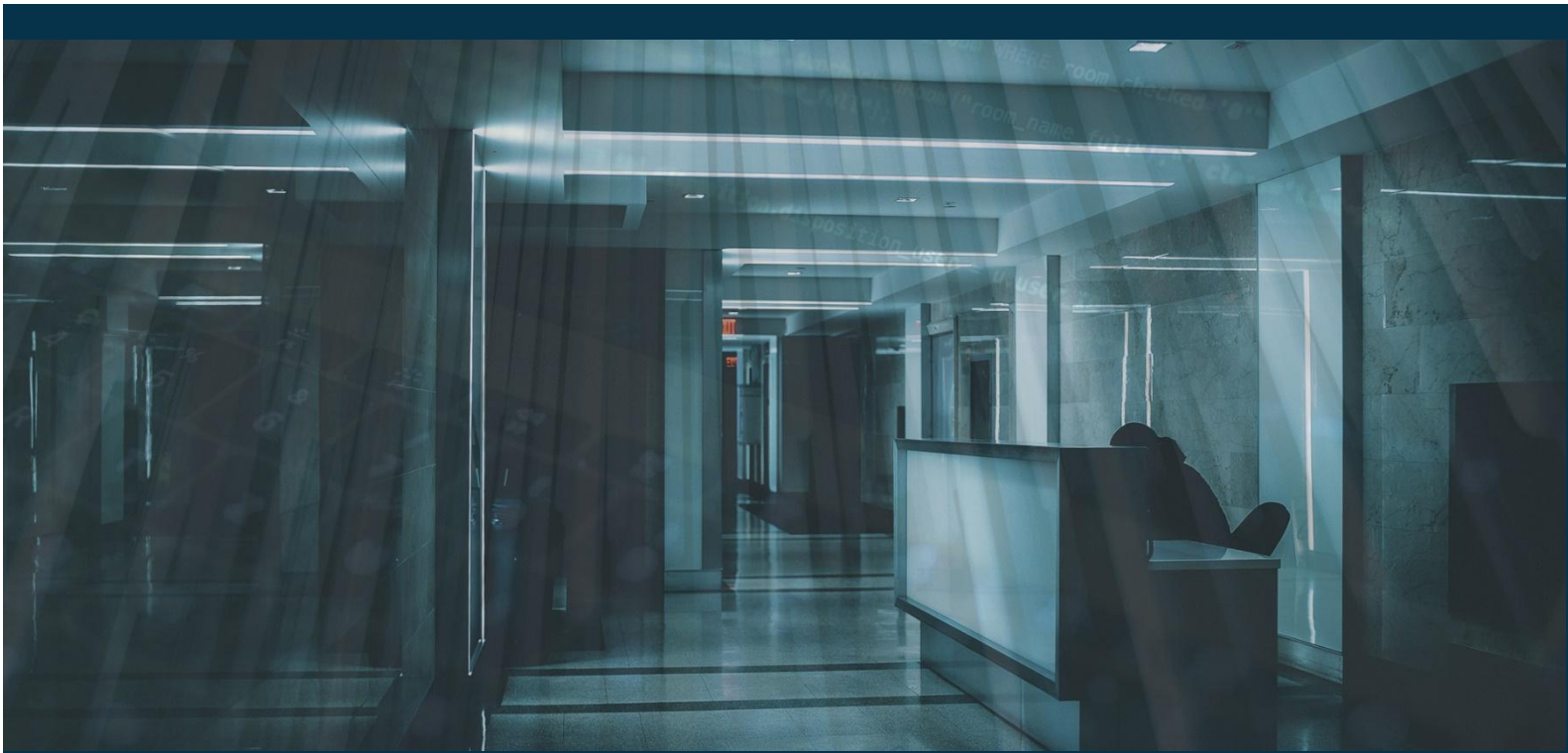


iMedX Clinical Documentation Solutions

eScript One Platform

InstaNote User Manual



Powered by iMedX Australia in partnership with
DeliverHealth Solutions.

Version 1.1 :: 11/03/2026



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About InstaNote

Available within the eScript One (eSOne), InstaNote uses generative AI technology to generate clinical documentation drafts shortly after the clinician has completed and uploaded a dictation.

Experience Requirement

This guide has been prepared by iMedX ANZ and is designed to assist clinicians who are already using the eSOne platform to dictate and review their letters. It is designed to assist clinicians in using **InstaNote** for dictating and reviewing their letters. If you are a new eSOne user, refer to the Clinician QuickStart guide as an introductory resource.

Workflow

The InstaNote workflow for users comprises three key components:

1. Dictation: This is familiar to the current users of eSOne as it mirrors the current dictation method.
2. Review: While users are familiar with reviewing letters, traditionally this involved an additional layer of human interaction. Now, this can be done by the user within seconds after the dictation has been uploaded.
3. Approve: This component remains the same as the current eSOne workflow.

Summary of the manual

The manual details the dictation, review and approval process for the users using InstaNote. In addition, the guide steps through four common scenarios that you may encounter while using the platform:

Scenario 1: The appointment list and patient details are already loaded on the user's system along with complete associate information.

Scenario 2: The appointment list and patient details are already loaded on the user's system without associate information.

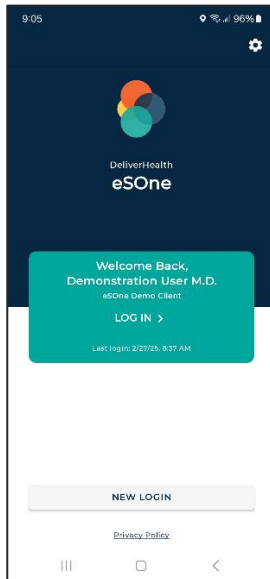
Scenario 3: The appointment list and patient details are not loaded on the user's system and the UR number is not available.

Scenario 4: The appointment list and patient details are not loaded on the user's system and the UR number is available.



Letter Creation Process using InstaNote

1. Open the eSOne App by clicking on this icon on your smartphone. This will bring you to the log-in screen.
2. Click the **Welcome Back Log In >** button. If this is your first time logging in to the app, choose **New Login**.

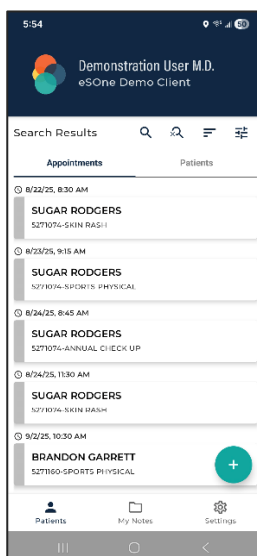


Scenario 1: The appointment list and patient details are already loaded on the user's system along with complete associate information.

In this scenario the PMS (Practice Management Software) has been integrated with the eSOne Platform. You will be able to view the pre-loaded Patient Schedule with the relevant data including associate information.

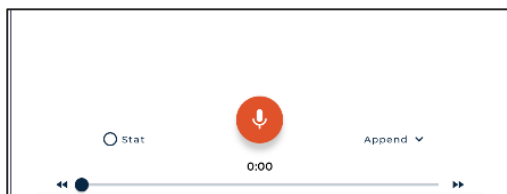
A. Steps to Dictate

1. From the patient appointments available, select the patient that you would like to dictate the letter for.



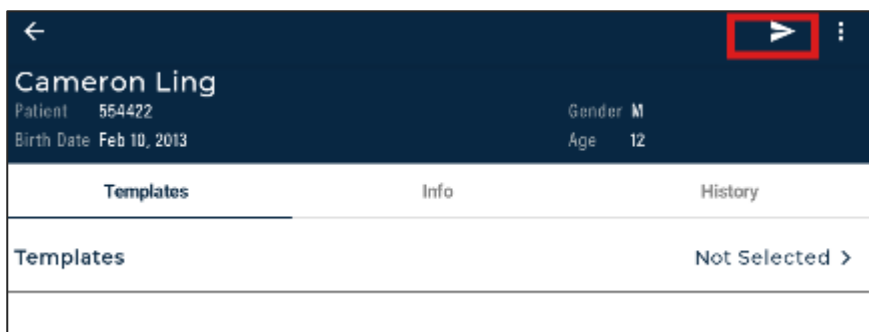


2. Check that the patient demographic information is accurate.
3. Click on the red record button (microphone icon) and begin your dictation.*

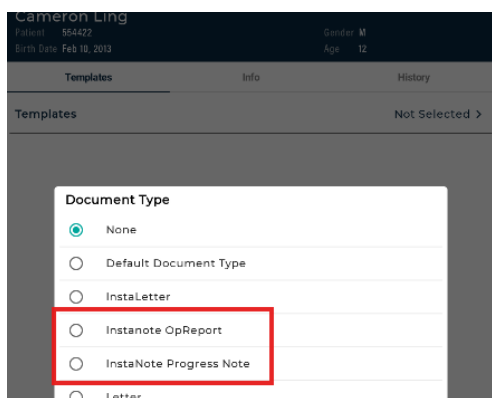


*Note that there is no change to the dictation style while using InstaNote.

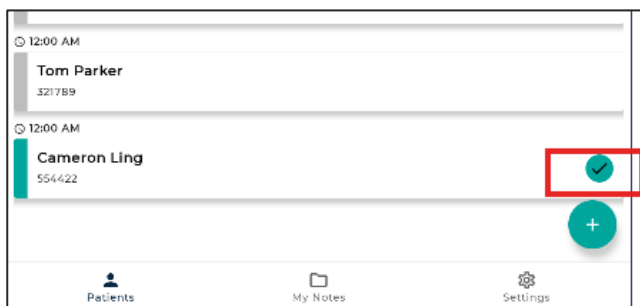
4. Click on the Upload arrow icon at the top of your screen to upload your file to the server.



5. Select the Location from the Pop up box and the Document Type – all InstaNote doc types will start with 'InstaNote'.



6. Once Uploaded you will see a tick beside the patient name, proceed to review the draft letter in InQuery.



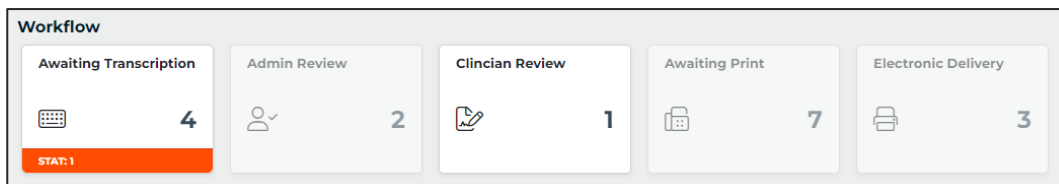


B. Steps to Review

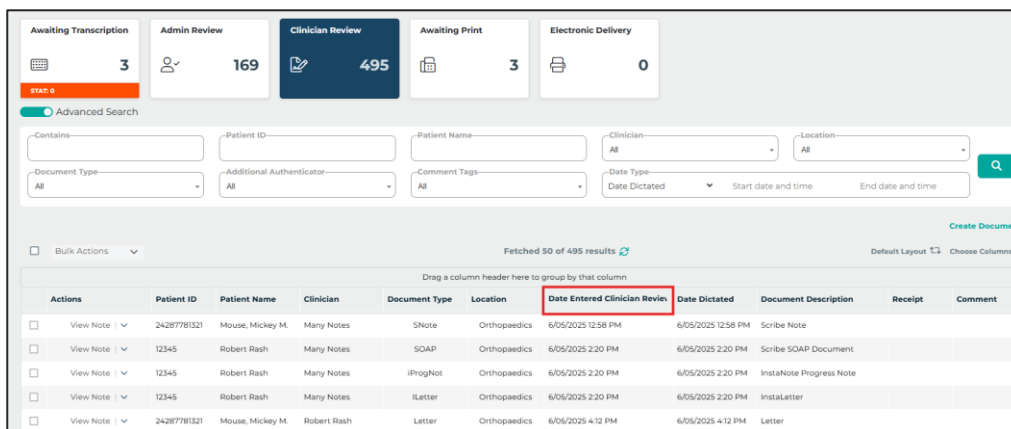
InstaNote typically builds a draft of the letter within 30 - 60 seconds after the dictation is uploaded and ready for review (depending on dictation length). The draft letter is available in the InQuery platform.**

*Draft generation time is dependent on dictation length.

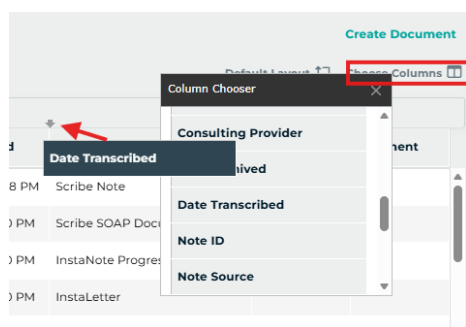
1. Log in to the InQuery platform via <https://imedx.com.au/client-login/>.
2. Select the **Clinician Review** folder from the workflow options available on the eSOne InQuery Dashboard.



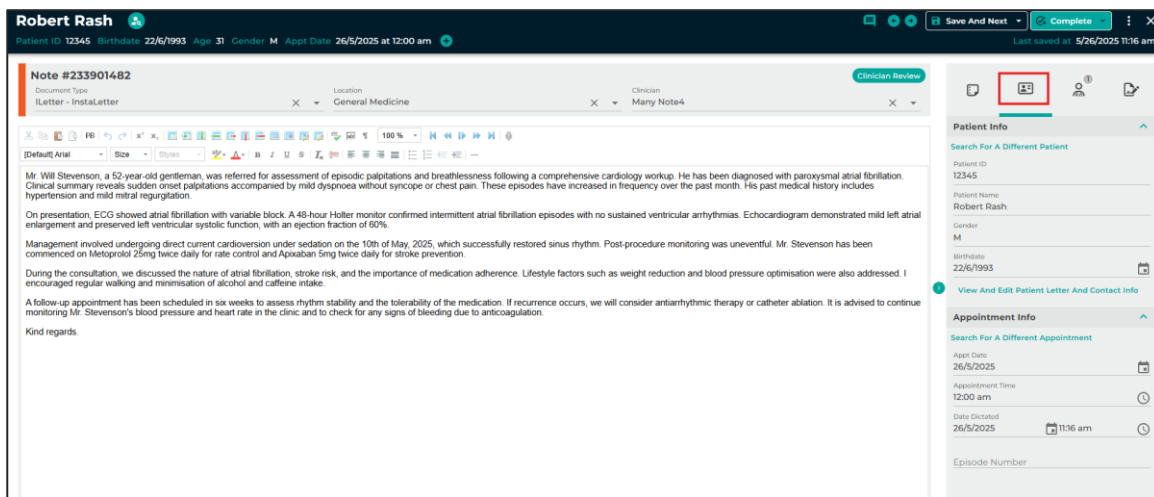
3. This will display all dictations with draft letters for review filtered in **Date Entered Clinician Review** order. Click on the patient letter you wish to review. This will open the letter draft in a new window.



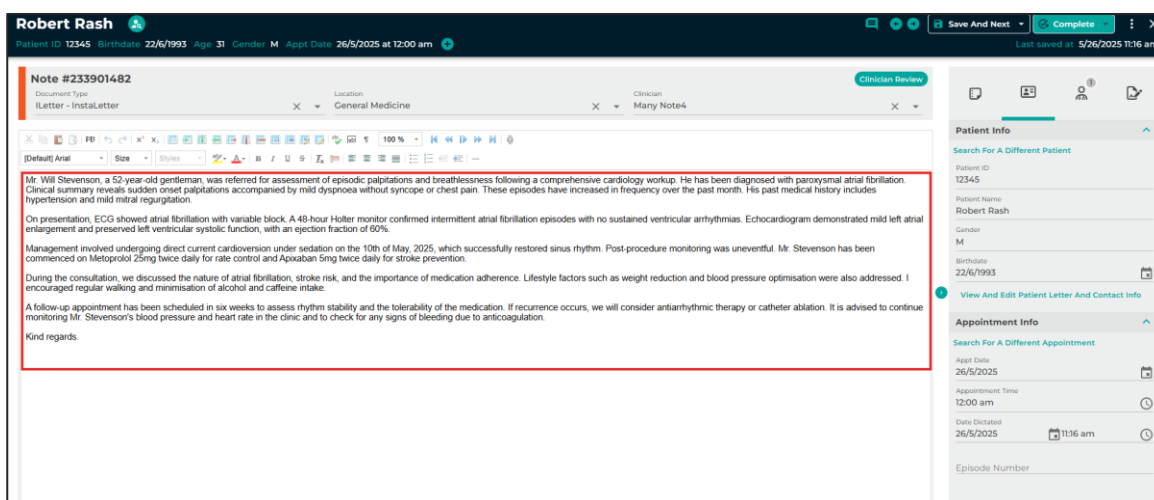
NOTE: If you need to add columns click the Choose Columns Menu and drag the new column to where you want it to display



4. **Review:** When reviewing the patient letter, be sure to check the following key components:
 - 4.1. Patient Information: Verify the patient details. Click on the Patient tab on the right-hand side and verify details are correct.

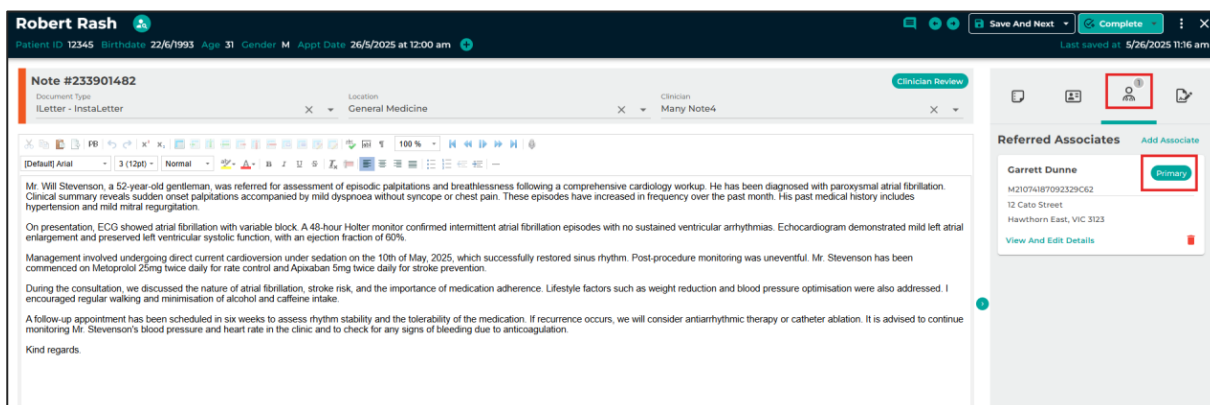


4.2. Body of the Letter: Verify the clinical accuracy of the details of the letter.



4.3. Associates: Verify the details of the associates at the bottom of the screen, add any missing information, or search for the required associate.

- **Note:** Ensure you set the Primary associate by clicking the Primary button in the top right of the Associate entry



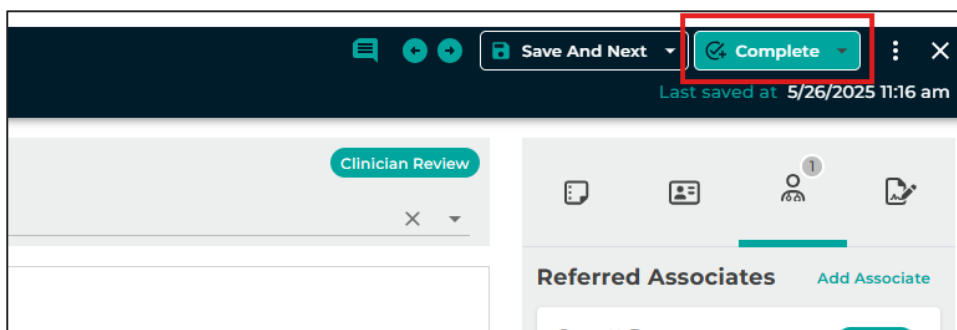


Note: InstaNote will change some speech and format into paragraphs to formalise the document. The review is to ensure that the clinical details remain the same.

When dictating that the scheduled appointment was in “*about*” three weeks – InstaNote may formalise this to read “approximately”. Users need to be aware of this and not assume that the body of the letter perfectly matches the dictation in all cases.

Note: Please be vigilant in your review of the body of the letter for each patient. Read the entirety of the document to ensure it is clinically accurate. As a clinician, you are the owner of your letter and responsible for the final content.

5. Click on the **Complete** icon at the top of your screen to confirm and complete this letter.



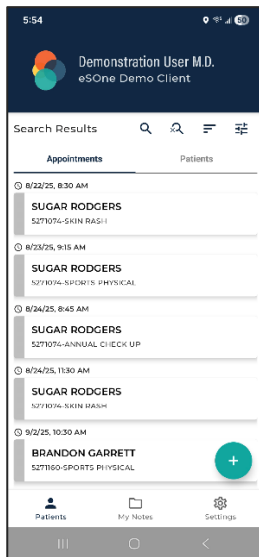


Scenario 2: The appointment list and patient details are already loaded on the user’s system without associate information.

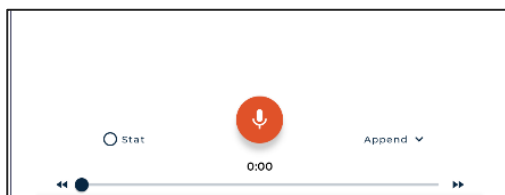
In this scenario the PMS (Practice Management Software) has been integrated with the eSOne Platform. Users are able to view the pre-loaded Patient Schedule, however there is no pre-loaded associate information.

A. Steps to Dictate

1. From the patient appointments available, select the patient that you would like to dictate the letter for.



2. Check that the patient demographic information is accurate.
3. Click on the red record button (microphone icon) and begin your dictation.*



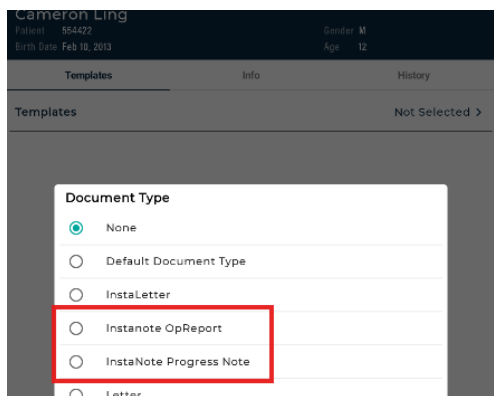
*Note that there is no change to the dictation style while using InstaNote.

4. Click on the Upload arrow icon at the top of your screen to upload your file to the server.

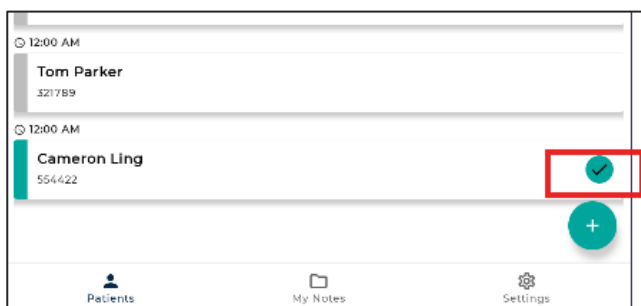




- Select the Location from the Pop up box and the **Document Type** – all InstaNote doc types will start with ‘InstaNote’.



- Once Uploaded you will see a tick beside the patient name, proceed to review the draft letter in InQuery.

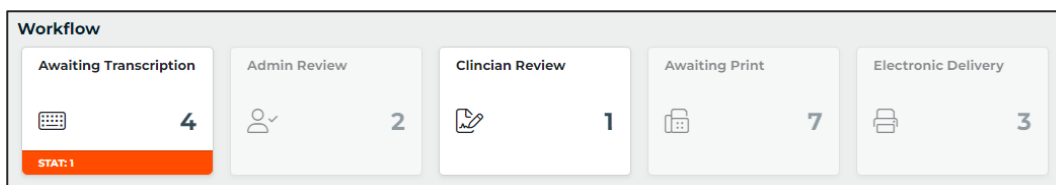


B. Steps to Review

InstaNote typically builds a draft of the letter within 30 - 60 seconds after the dictation is uploaded and ready for review (depending on dictation length). The draft letter is available in the InQuery platform.**

*Draft generation time is dependent on dictation length.

- Log in to the InQuery platform via <https://imedx.com.au/client-login/>.
- Select the **Clinician Review** folder from the workflow options available on the eSOne InQuery Dashboard.



- This will display all dictations with draft letters for review filtered in **Date Entered Clinician Review** order. Click on the patient letter you wish to review. This will open the letter draft in a new window.



The dashboard shows document status: 3 Awaiting Transcription, 169 Admin Review, 495 Clinician Review, 3 Awaiting Print, and 0 Electronic Delivery. Below are search filters and a table of documents.

Actions	Patient ID	Patient Name	Clinician	Document Type	Location	Date Entered Clinician Review	Date Dictated	Document Description	Receipt	Comment
<input type="checkbox"/> View Note	24287781321	Mouse, Mickey M.	Many Notes	SNote	Orthopaedics	6/05/2025 12:58 PM	6/05/2025 12:58 PM	Scribe Note		
<input type="checkbox"/> View Note	12345	Robert Rash	Many Notes	SOAP	Orthopaedics	6/05/2025 2:20 PM	6/05/2025 2:20 PM	Scribe SOAP Document		
<input type="checkbox"/> View Note	12345	Robert Rash	Many Notes	iProgNot	Orthopaedics	6/05/2025 2:20 PM	6/05/2025 2:20 PM	InstaNote Progress Note		
<input type="checkbox"/> View Note	12345	Robert Rash	Many Notes	ILetter	Orthopaedics	6/05/2025 2:20 PM	6/05/2025 2:20 PM	InstaLetter		
<input type="checkbox"/> View Note	24287781321	Mouse, Mickey M.	Robert Rash	Letter	Orthopaedics	6/05/2025 4:12 PM	6/05/2025 4:12 PM	Letter		

NOTE: If you need to add more columns for viewing click the Choose Columns Menu and drag the new column onto the screen

The 'Choose Columns' dialog box is open, showing a list of columns. 'Date Transcribed' is highlighted with a red arrow. Other columns include Consulting Provider, Date Transcribed, Note ID, and Note Source.

- The associates are missing from the draft letter below. The letter requires this information before approval and delivery. InstaNote provides the user more control over the clinical documentation workflow, making it important for the user to review these details.

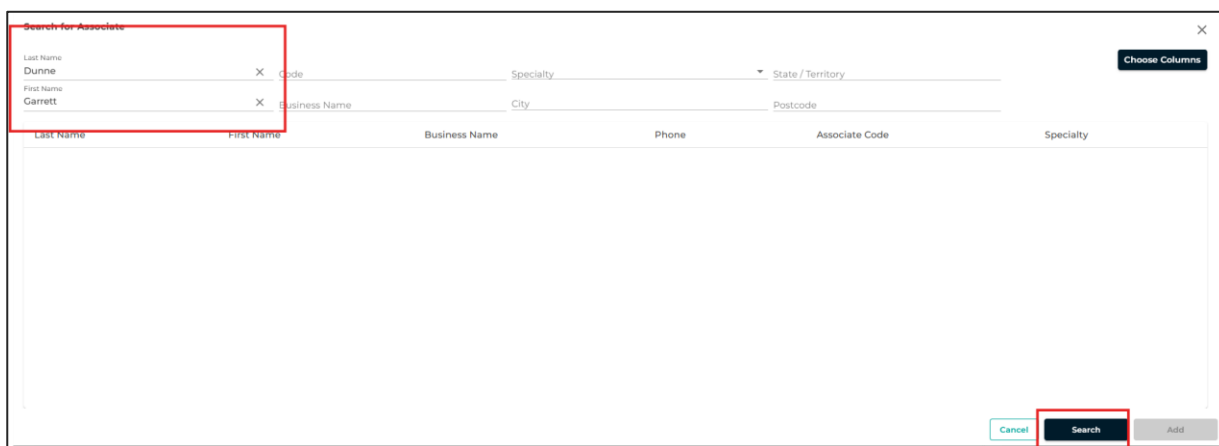
The screenshot shows a patient's medical note for Robert Rash. The 'Referred Associates' tab is highlighted in the right-hand sidebar.

- To add an associate, click the **Associate** tab on the right-hand side, then click **Add Associate** and **Search**.

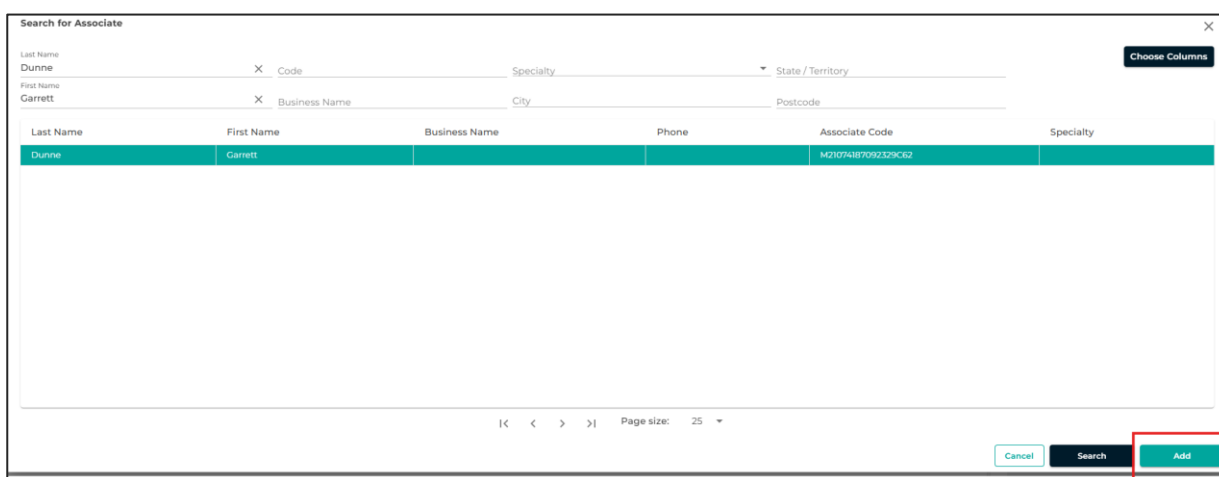
The 'Referred Associates' dialog box is shown. The 'Add Associate' button and the 'Search' input field are highlighted with red boxes.



6. Enter relevant associate details in the fields including last name, first name, at minimum and click on **Search**.



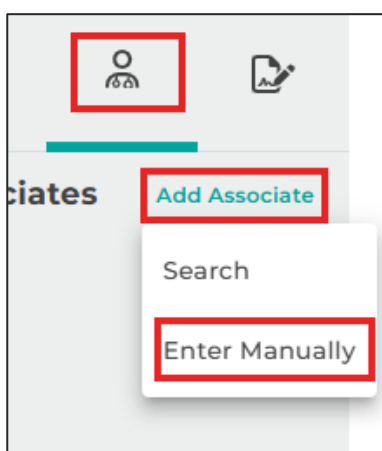
7. Click on the associate you have searched for and add. *



*Note that multiple associates can be added by following the same process.

8. If the associate details are not in the database, you will need to add a new associate.

9. To add a new associate, click **Add Associate** then **Enter Manually**.



10. Enter the information for the new associate in the fields available on the next blank record, then click **Add**.



Add Associate ✕

Update info in database Patient's PCP Make Primary

Code Business Name

Prefix First Name Middle Name

Suffix Last Name

Greeting Speciality

Address 1 Address 2

Address 3 City

State / Territory Postcode Phone

Fax AutoFax Email

Cancel Search For Associate Add

11. Enter all missing data in the draft letter and undertake a final check by reading through **all** the details to ensure that the letter is ready to be sent. Remember to review:
 - 11.1 Patient Information: Verify the patient details. Click on the Patient tab on the right-hand side and verify details are correct.

Robert Rash Save And Next Complete

Patient ID: 12345 Birthdate: 22/6/1993 Age: 31 Gender: M Appt Date: 26/5/2025 at 12:00 am

Note #233901482 Location: General Medicine Clinician: Many Note4

Document Type: iLetter - InstalLetter

Patient Info

Search For A Different Patient

Patient ID: 12345
 Patient Name: Robert Rash
 Gender: M
 Birthdate: 22/6/1993

View And Edit Patient Letter And Contact Info

Appointment Info

Search For A Different Appointment

Appt Date: 26/5/2025
 Appointment Time: 12:00 am
 Date Dictated: 26/5/2025 11:16 am

Episode Number

Mr. Will Stevenson, a 52-year-old gentleman, was referred for assessment of episodic palpitations and breathlessness following a comprehensive cardiology workup. He has been diagnosed with paroxysmal atrial fibrillation. Clinical summary reveals sudden onset palpitations accompanied by mild dyspnoea without syncope or chest pain. These episodes have increased in frequency over the past month. His past medical history includes hypertension and mild mitral regurgitation.

On presentation, ECG showed atrial fibrillation with variable block. A 48-hour Holter monitor confirmed intermittent atrial fibrillation episodes with no sustained ventricular arrhythmias. Echocardiogram demonstrated mild left atrial enlargement and preserved left ventricular systolic function, with an ejection fraction of 60%.

Management involved undergoing direct current cardioversion under sedation on the 10th of May, 2025, which successfully restored sinus rhythm. Post-procedure monitoring was uneventful. Mr. Stevenson has been commenced on Metoprolol 25mg twice daily for rate control and Apixaban 5mg twice daily for stroke prevention.

During the consultation, we discussed the nature of atrial fibrillation, stroke risk, and the importance of medication adherence. Lifestyle factors such as weight reduction and blood pressure optimisation were also addressed. I encouraged regular walking and minimisation of alcohol and caffeine intake.

A follow-up appointment has been scheduled in six weeks to assess rhythm stability and the tolerability of the medication. If recurrence occurs, we will consider antiarrhythmic therapy or catheter ablation. It is advised to continue monitoring Mr. Stevenson's blood pressure and heart rate in the clinic and to check for any signs of bleeding due to anticoagulation.

Kind regards.

- 11.2 Body of the Letter: Verify the clinical accuracy of the details of the letter.

Robert Rash Save And Next Complete

Patient ID: 12345 Birthdate: 22/6/1993 Age: 31 Gender: M Appt Date: 26/5/2025 at 12:00 am

Note #233901482 Location: General Medicine Clinician: Many Note4

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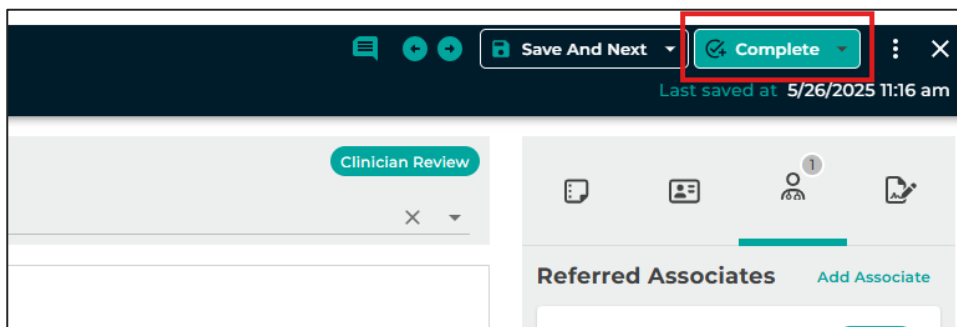


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Note: Please be vigilant in your review of the body of the letter for each patient. Read the entirety of the document to ensure it is clinically accurate. As a clinician, you are the owner of your letter and responsible for the final content.

12. Click on the **Complete** icon at the top of your screen to confirm and complete this letter.



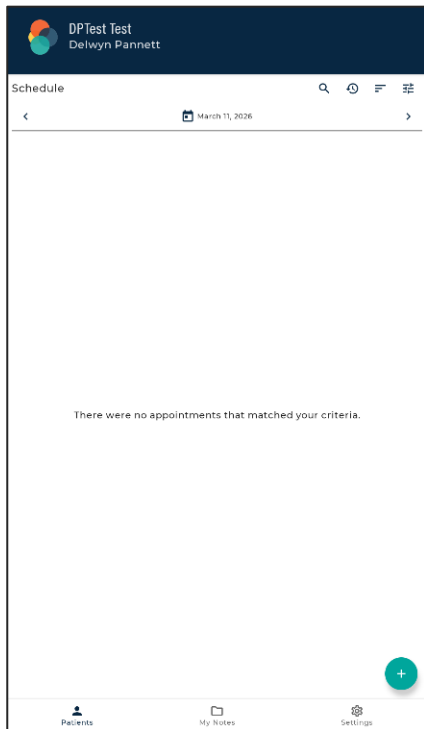


Scenario 3: The appointment list and patient details are not loaded on the user's system and the UR number is not available.

In this scenario, the patient and appointment list do not populate automatically and the patient details are not available.

A. Steps to Dictate

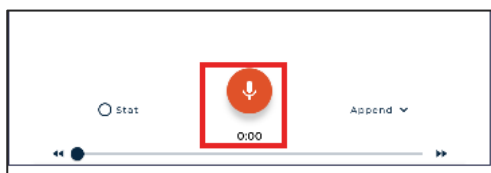
1. When there is no patient list available, the screen appears in the following manner:



2. Click on the Plus icon at the bottom of the screen to add a new patient to the list.

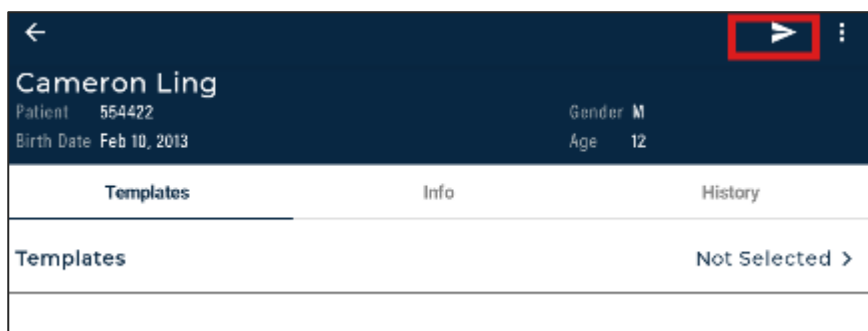


3. When you don't have the patient demographic information readily available, click on the red record button (microphone icon) and begin your dictation, include the patient details in the dictation.

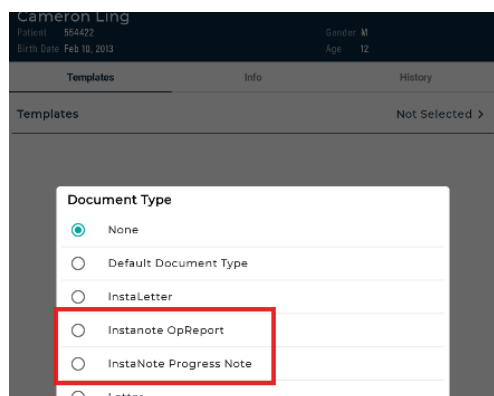


*Note that there is no change to the dictation style while using InstaNote.

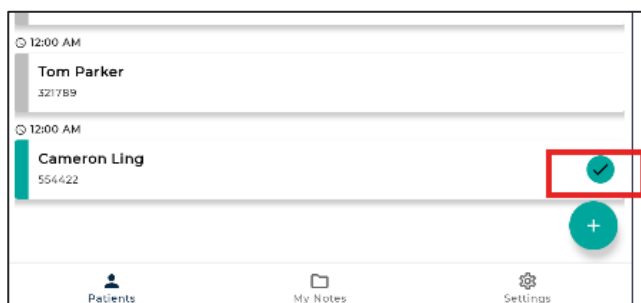
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5. Select the Location from the Pop up box and the Document Type – all InstaNote doc types will start with ‘InstaNote’.



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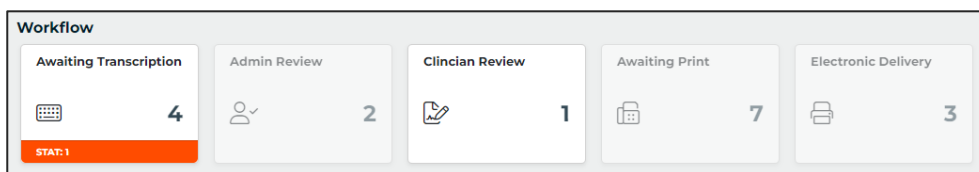


B. Steps to Review

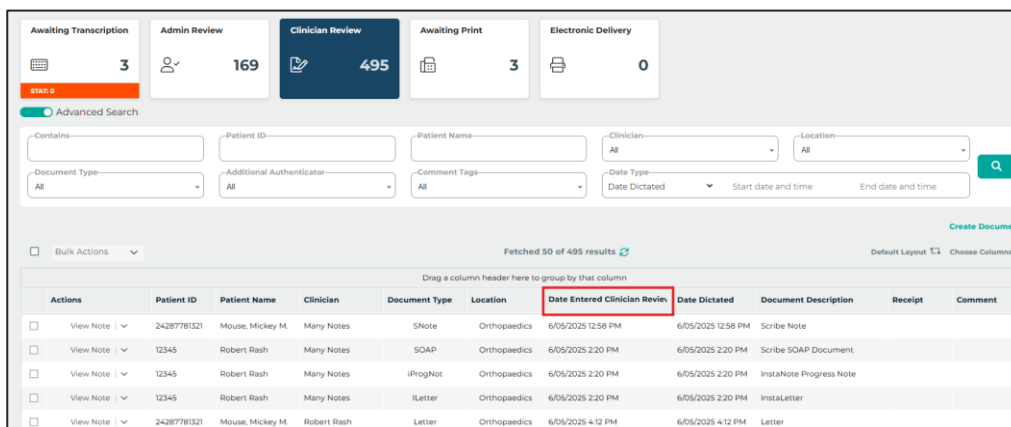
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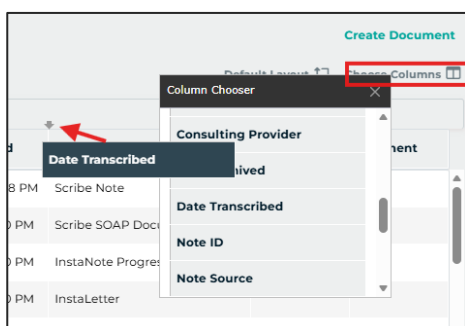
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2. Select the **Clinician Review** folder from the workflow options available on the eSOne InQuery Dashboard.



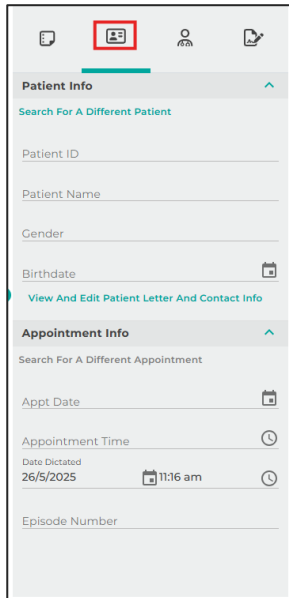
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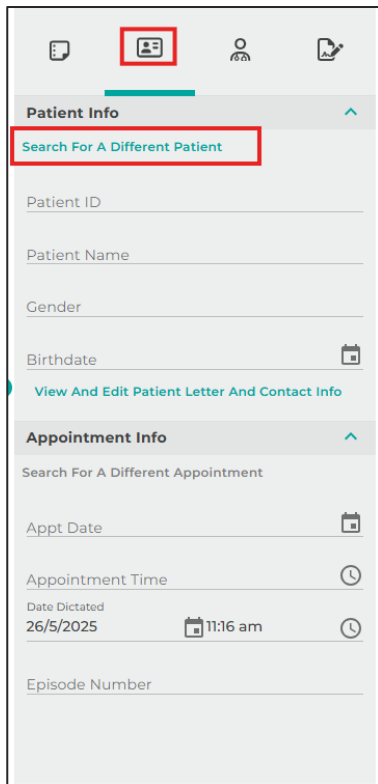
NOTE: If you need to add more columns for viewing click the Choose Columns Menu and drag the new column onto the screen



4. To add the patient details, click the **Patient tab** on the right-hand side.



5. Click on Search for a Different Patient



6. Enter the patient's name and click Search.



Search Patients

Last Name
Smith

First Name
John

Birthdate

First Name	Last Name	Gender	Birthdate	Appt Date	Patient ID
No records to display					

Cancel Search

7. This will dynamically present results based on records available in your database. Click on the required patient.

Appointments

Last Name
Smith

First Name
John

Birthdate

First Name	Last Name	Gender	Birthdate	Appt Date	Patient ID
John	Smith	I	9/5/2025		123458
John	Smith	M	14/7/2020		444444
John	Smith	M			1
John	Smith	M	14/9/1992		ZZZ0032

Page size: 25

Cancel Search

8. Click on the appointment date and click **Select**

Appointments

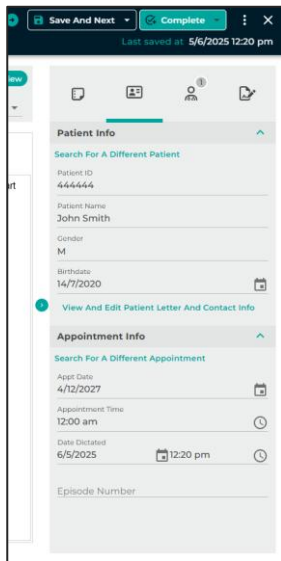
Appt Date	Appointment Time	Description	Patient ID	Patient Name	Gender	Birthdate	Location ID
8/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
7/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
6/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
5/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
4/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
3/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
2/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
1/12/2027	12:00 am		444444	John Smith	M	14/7/2020	
8/11/2027	12:00 am		444444	John Smith	M	14/7/2020	
7/11/2027	12:00 am		444444	John Smith	M	14/7/2020	
6/11/2027	12:00 am		444444	John Smith	M	14/7/2020	
5/11/2027	12:00 am		444444	John Smith	M	14/7/2020	
4/11/2027	12:00 am		444444	John Smith	M	14/7/2020	

Page size: 25

Cancel Back **Select**

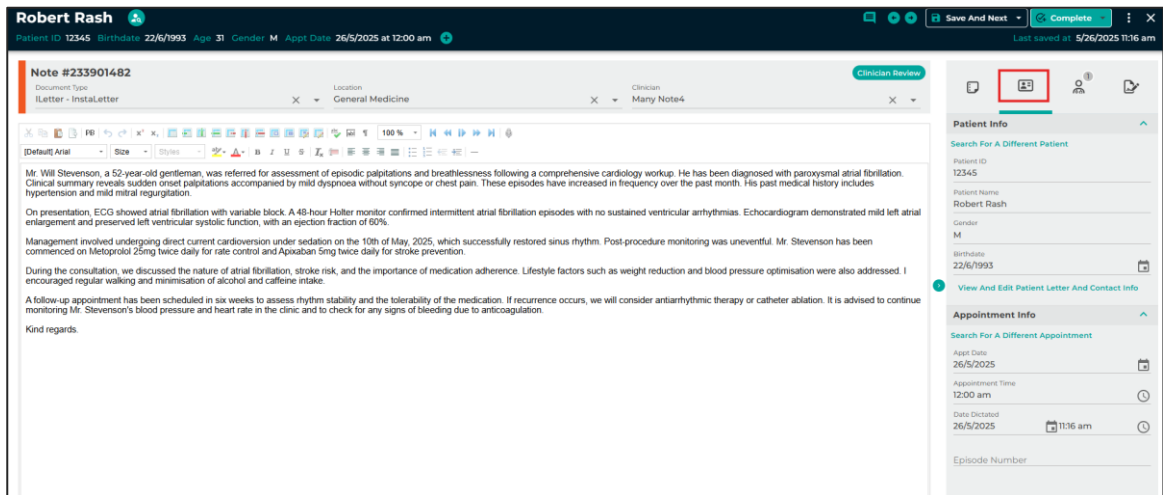


9. Once selected, the results would automatically populate the patient details in the draft letter.

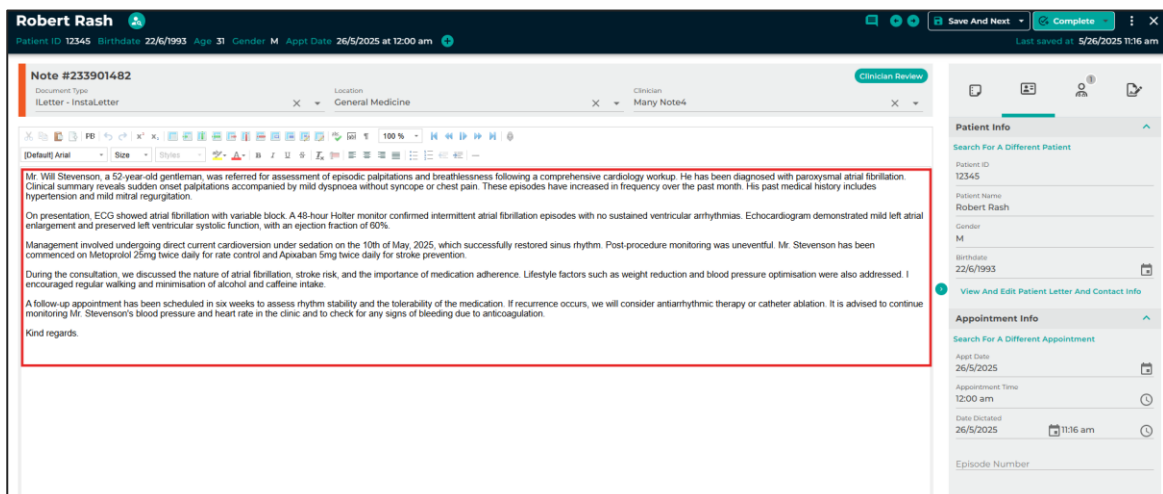


10. **Review:** When reviewing the patient letter, be sure to check the following key components:

10.1 Patient Information: Verify the patient details. Click on the Patient tab on the right-hand side and verify details are correct.



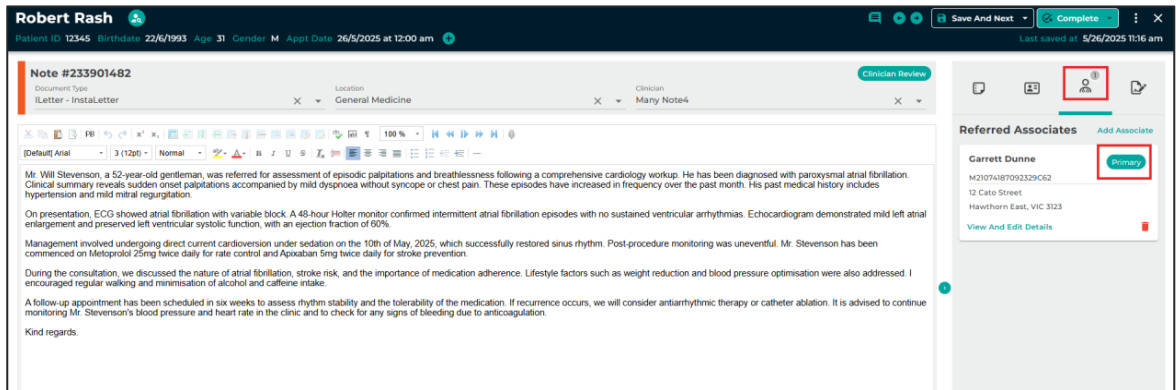
10.2 Body of the Letter: Verify the clinical accuracy of the details of the letter.





10.3 Associates: Verify the details of the associates at the bottom of the screen, add any missing information, or search for the required associate.

- **Note:** Ensure you set the Primary associate by clicking the Primary button in the top right of the Associate entry

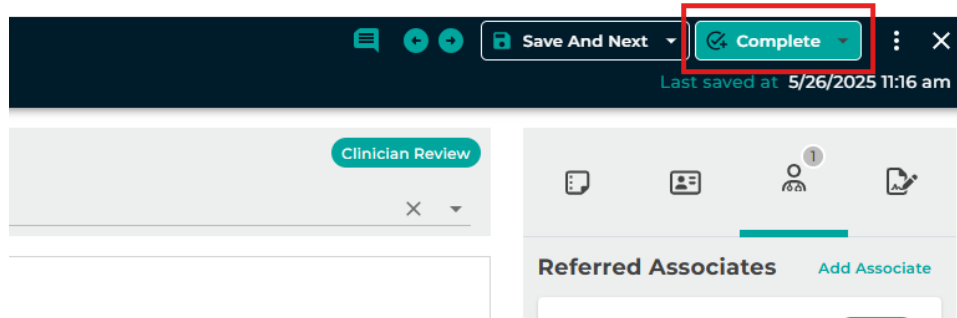


Note: InstaNote will change some speech and format into paragraphs to formalise the document. The review is to ensure that the clinical details remain the same.

When dictating that the scheduled appointment was in “*about*” three weeks – InstaNote may formalise this to read “approximately”. Users need to be aware of this and not assume that the body of the letter perfectly matches the dictation in all cases.

Note: Please be vigilant in your review of the body of the letter for each patient. Read the entirety of the document to ensure it is clinically accurate. As a clinician, you are the owner of your letter and responsible for the final content.

11 Click on the **Complete** icon at the top of your screen to confirm and complete this letter.



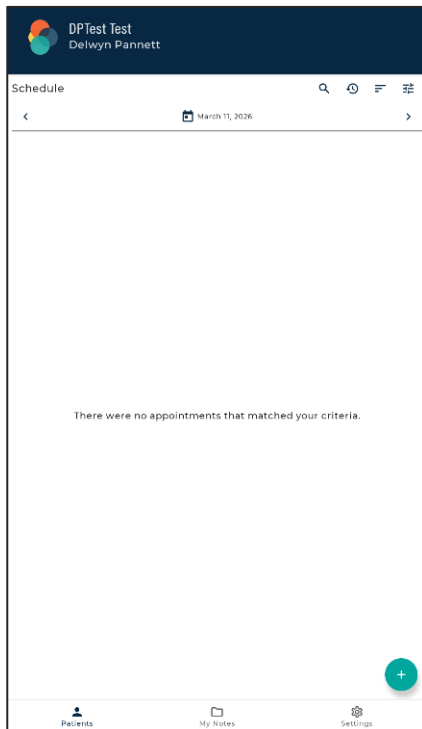


Scenario 4: The appointment list and patient details are not loaded on the user's system and the UR number is available.

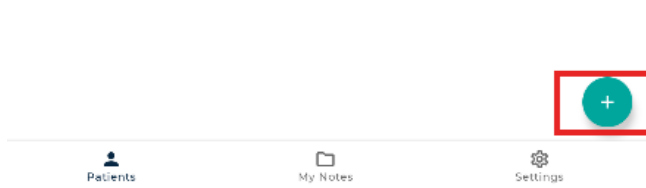
In this scenario, the patient and appointment list do not populate automatically, however, the patient details are available.

A. Steps to Dictate

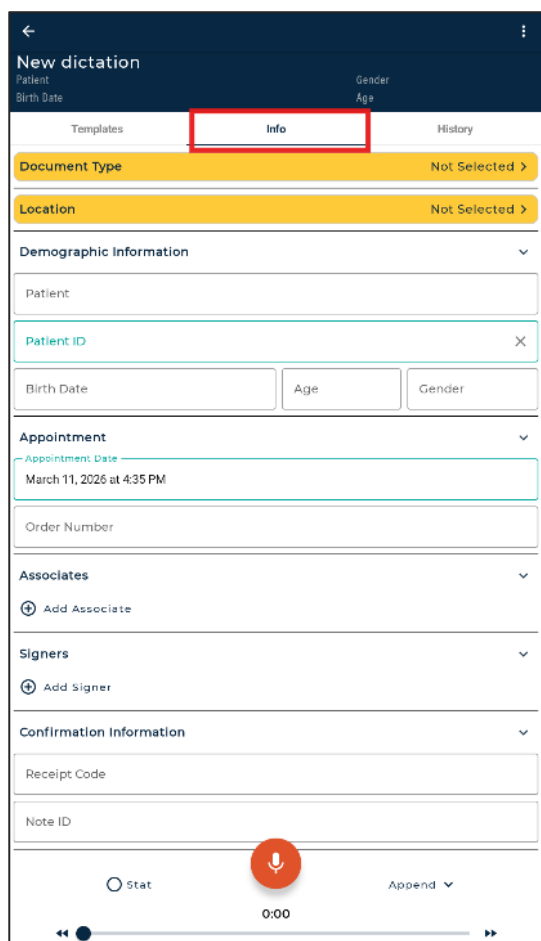
1. When there is no patient list available, the screen appears in the following manner:



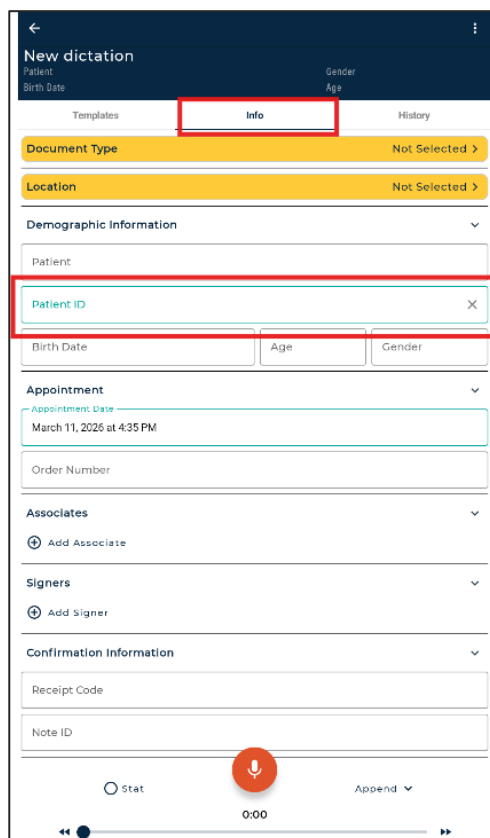
2. Click on the Plus icon at the bottom of the screen to add a new patient to the list.



3. Click on the Info tab at the top



4. Click in the **Patient ID** field and enter the **UR number** for the patient.





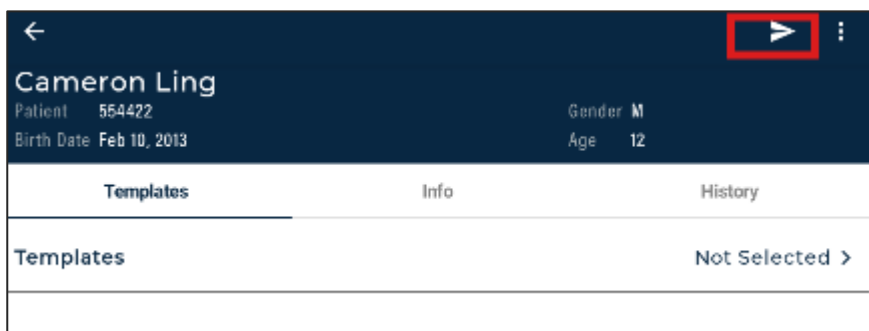
TIP: By doing this, it will save you time when reviewing the letter, as all the Patient information will be dynamically filled for this record.

Note: By entering the UR number before dictation, this results in showing the UR number under the New Dictation message.

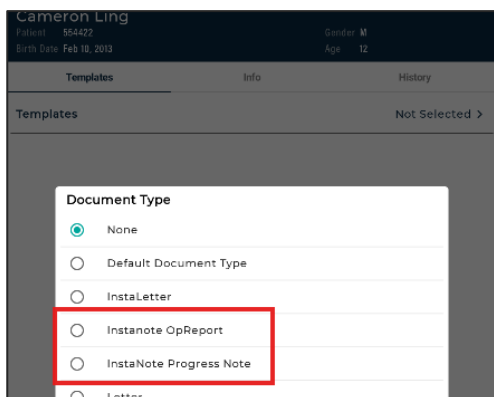
- 5. Click on the red record button (microphone icon)  and begin your dictation.*

*Note that there is no change to the dictation style while using InstaNote.

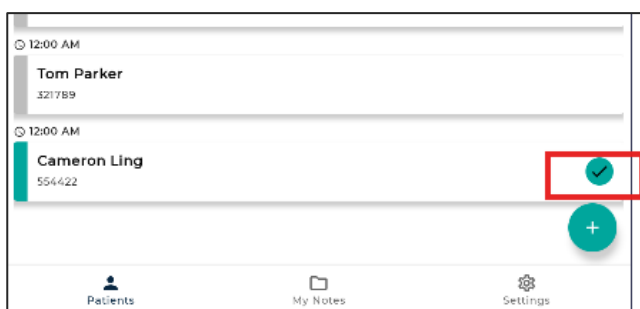
Click on the **Upload arrow icon** at the top of your screen to upload your file to the server.



- 6. Select the Location from the Pop up box and the **Document Type** – all InstaNote doc types will start with ‘InstaNote’.



- 7. Once Uploaded you will see a tick beside the patient name, proceed to review the draft letter in InQuery.



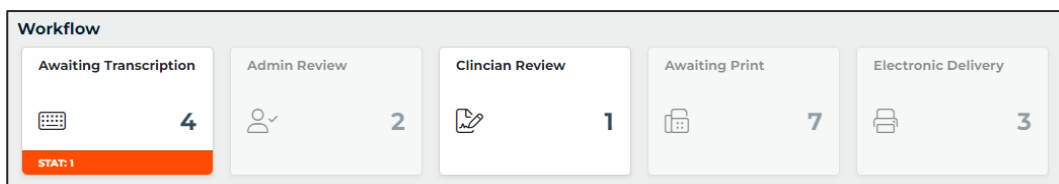


B. Steps to Review

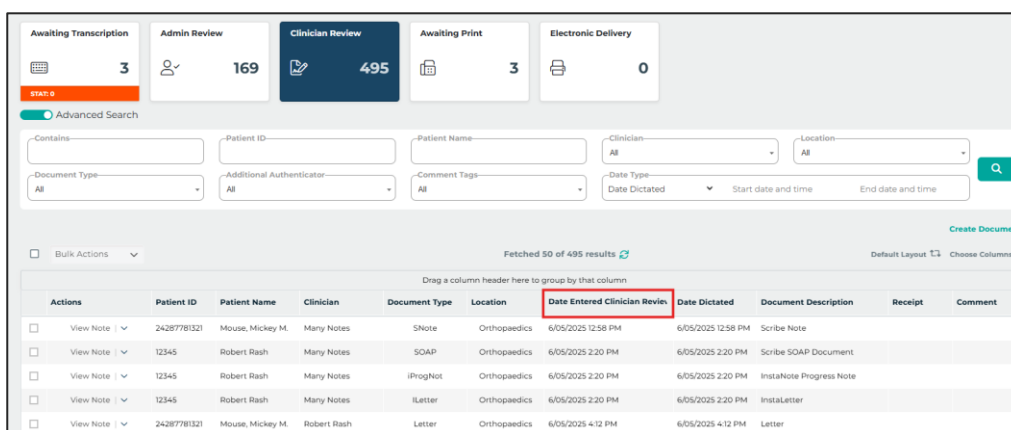
InstaNote typically builds a draft of the letter within 30-60 seconds after the dictation is uploaded and ready for review (depending on dictation length). The draft letter is available in the InQuery platform.**

*Draft generation time is dependent on dictation length.

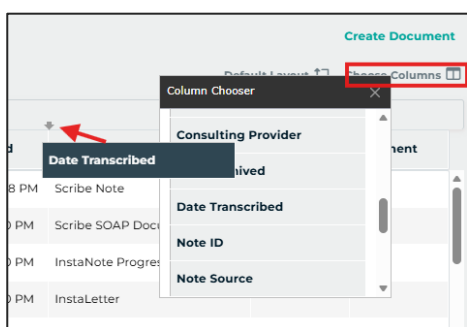
- 1 Log in to the InQuery platform via <https://imedx.com.au/client-login/>.
- 2 Select the **Clinician Review** folder from the workflow options available on the eSOne InQuery Dashboard.



- 3 This will display all dictations with draft letters for review filtered in **Date Entered Clinician Review** order. Click on the patient letter you wish to review. This will open the letter draft in a new window.

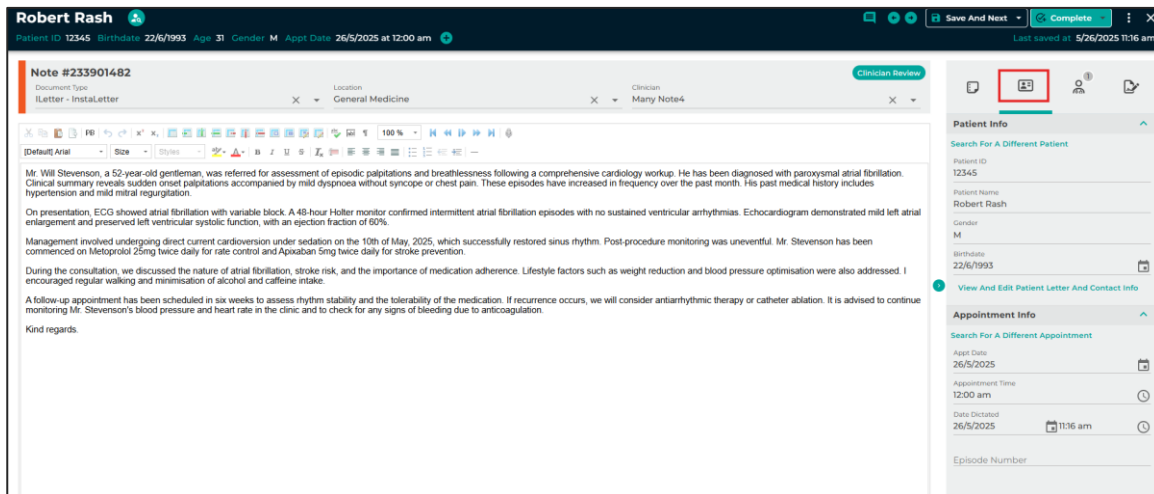


NOTE: If you need to add more columns for viewing click the Choose Columns Menu and drag the new column onto the screen

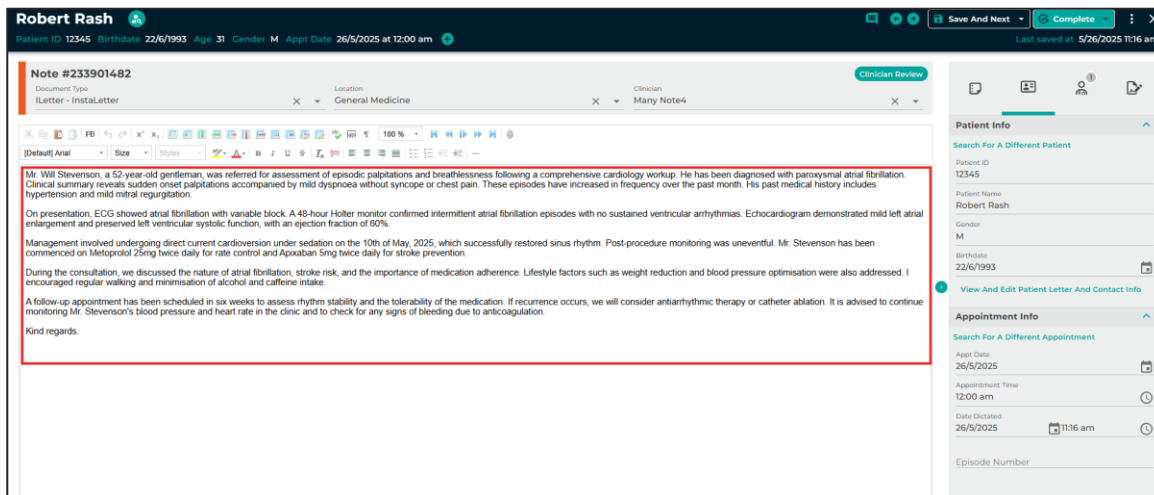


4 Review: When reviewing the patient letter, be sure to check the following key components:

4.1 Patient Information: Verify the patient details. Click on the Patient tab on the right-hand side and verify details are correct.

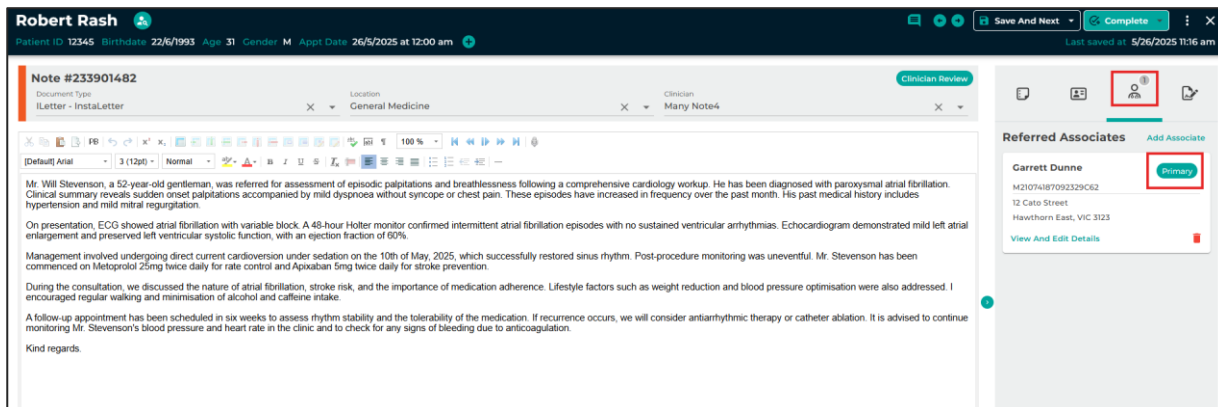


4.2 Body of the Letter: Verify the clinical accuracy of the details of the letter.



4.3 Associates: Verify the details of the associates at the bottom of the screen, add any missing information, or search for the required associate.

- Note: Ensure you set the Primary associate by clicking the Primary button in the top right of the Associate entry



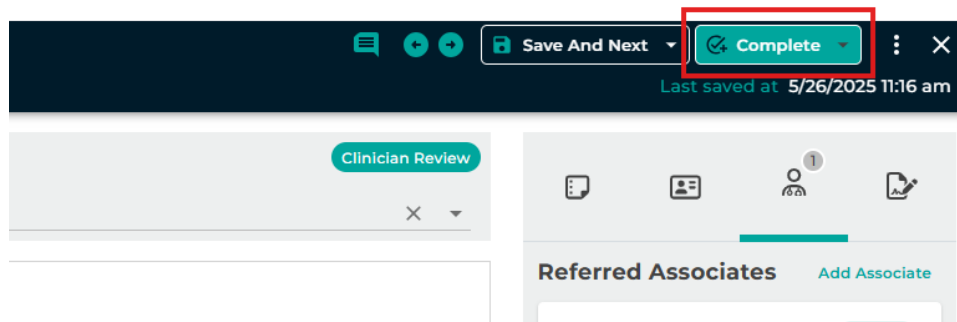


Note: InstaNote will change some speech and format into paragraphs to formalise the document. The review is to ensure that the clinical details remain the same.

When dictating that the scheduled appointment was in “*about*” three weeks – InstaNote may formalise this to read “approximately”. Users need to be aware of this and not assume that the body of the letter perfectly matches the dictation in all cases.

Note: Please be vigilant in your review of the body of the letter for each patient. Read the entirety of the document to ensure it is clinically accurate. As a clinician, you are the owner of your letter and responsible for the final content.

6. Click on the **Complete** icon at the top of your screen to confirm and complete this letter.



Summary

InstaNote enables you to dictate the letter in the same manner and requires no modification to the dictation method.

- InstaNote workflow has been designed to provide clinicians with greater flexibility and control over the dictation workflow, reducing manual steps and human intervention. Accordingly, there is a need to spend time on a detailed review of the draft AI generated letter to ensure clinical and logical accuracy. The following details must be captured in the review:
 - Patient details: The correct patient has been selected
 - Body of the letter: Clinical Accuracy of the letter and formatting of the letter based on any individual preferences
 - Associate details: Verify/ add the associate details for the recipients of the letter

Generative AI capabilities continue to evolve and may improve the quality of output over time.

If dictating without the patient list, add the UR number of the patient when the patient details are not available to save time in the Review section of your process.

By using InstaNote, the workflow may be simplified and can reduce letter completion time (for example, by ~2-3 days), depending on dictation length, review time, and local processes.