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User's **Manual**

TouchType 2 User Guide for Managers

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7428 SouthWest 48 Street
Miami, FL 33155
Phone 786.268.1161 Fax 786.268.7011

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TouchType2 for Transcription Managers

If you are reading this you are most likely a manager in your organization.

Fortunately, TouchType2 has specific features just for you. These features will allow you to manage your customers and employees more quickly and more efficiently.

Before reading this user guide, you should make sure that you have a thorough understanding of the TouchType2 features for MTs. Reading *TouchType2 for Transcriptionists* will be essential for you to understand this section for managers.

Chapter 1 - Dictation Management

The most obvious difference that you will notice as a manager is that you have a couple of additional sections in your Navigation Tree. The first of these is *Dictation Management*. The *Dictation Management* section will allow you to access all the voice files for your customers according to almost any type of grouping you could want.

It is important to note that there is a difference between the voice files that you will see in *Dictation Management* vs. the voice files you will see in the *Pool*. *Dictation Management* will contain all the voice files for all of your healthcare customers. The *Pool* will contain only those voice files for which your user account has been granted transcription access. (If you do not see voice files in your pool that you do need to transcribe, you can add to your access level using the *admin* link in the MTwebtop.)

1.1 Dictation Management Summary

When you click on *Dictation Management* in the Navigation Tree, you will be presented with a summary tab. The summary tab will display the oldest voice file available, the newest voice file available, and the total number of voice files by status (unassigned, reserved, suspended, in progress, qa, and marked incomplete).

In addition, the summary tab contains quicklinks which will allow you to group your dictations for easier management. The available grouping levels are *by account*, *by dictating physician*, *by transcriptionist*, *by status*, and *by worktype*.

1.2 By Account

The first way to manage your dictations is by account. In order to manage by account, simply click the *By Account* folder item in your Navigation Tree. A summary tab will open in your workspace. The summary tab will list all of the transcription accounts which you manage. For each account, it will indicate the oldest and the newest jobs, how many jobs are awaiting completion, and the total minutes available.

If you double click on any of the transcription accounts in the summary tab, your workspace will display a grid of all the current voice files for that account. You can work with any of the voice files from this grid, just as if you were working in the pool, or from a voice file search. Simply right click on one (or multiple) dictations and choose from the available options in the right click context menu.

1.3 By Dictating Physician

The second way to manage your dictations is by dictating physician. In order to manage by dictating physician, simply click the *By Dictating Physician* folder item in your Navigation Tree. A summary tab will open in your workspace. The summary tab will list all of the physicians who currently have work in the system. (Note: If you do not see a physician in the list, he/she does not have any open voice files in the system.) For each physician, it will indicate the oldest and the newest jobs, how many jobs are awaiting completion, and the total minutes available.

If you double click on any of the physicians in the summary tab, your workspace will display a grid of all the current voice files for that physician. You can work with any of the voice files from this grid, just as if you were working in the pool, or from a voice file search. Simply right click on one (or multiple) dictations and choose from the available options in the right click context menu.

1.4 By Transcriptionist

A third way to manage your dictations is by transcriptionist. In order to manage by transcriptionist, simply click the *By Transcriptionist* folder item in your Navigation Tree. A summary tab will open in your workspace. The summary tab will list all of the transcriptionists who currently have work assigned to them. (Note: If you do not see a transcriptionist in the list, he/she does not have any voice files selected or reserved) For each transcriptionist, it will indicate the oldest and the newest jobs, how many jobs are awaiting completion, and the total minutes available.

If you double click on any of the transcriptionists in the summary tab, your workspace will display a grid of all the current voice files for that transcriptionist. You can work with any of the voice files from this grid, just as if you were working in the pool, or from a voice file search. Simply right click on one (or multiple) dictations and choose from the available options in the right click context menu.

1.5 By Status

A fourth way to manage your dictations is by status. In order to manage by status, simply click the *By Status* folder item in your Navigation Tree. A summary tab will open in your workspace. The summary tab will list the four status types: Available, In Progress, Reserved, and Suspended. For each status, it will indicate the oldest and the newest jobs, how many jobs are awaiting completion, and the total minutes available.

If you double click on any status in the summary tab, your workspace will display a grid of all the current voice files for that status. You can work with any of the voice files from this grid, just as if you were working in the pool, or from a voice file search. Simply right click on one (or multiple) dictations and choose from the available options in the right click context menu.

1.6 By Worktype

The final way to manage your dictations is by dictation worktype. In order to manage by dictation worktype, simply click the *By Worktype* folder item in your Navigation Tree. A summary tab will open in your workspace. The summary tab will list all of the worktypes which currently have work assigned to them. For each worktype, it will indicate the oldest and the newest jobs, how many jobs are awaiting completion, and the total minutes available.

If you double click on any of the worktypes in the summary tab, your workspace will display a grid of all the current voice files for that worktype. You can work with any of the voice files from this grid, just as if you were working in the pool, or from a voice file search. Simply right click on one (or multiple) dictations and choose from the available options in the right click context menu.

Chapter 2 - Managing Voice Files

If you have read the Chapter titled *Working with Voice Files* you will know all about the different things that you can do to a voice file when you have a transcriptionist role in our system. This chapter covers the additional functionality that you will have as an MT Manager.

2.1 Editing Voice Files

As a transcriptionist, you do have the ability to edit voice files, however as a manager you will have additional editing capability. In addition to editing the dictating physician and MRN, you also have the ability to edit the worktype and the priority of a dictation.

In order to edit a dictation, simply right click on the dictation (or group of dictations) and click *Edit* from the context menu. Select the correct Worktype or Priority and then click **OK**.

Be Careful!
It is important to understand that when you change a worktype, you are presented with a list of all the worktypes available for every one of your accounts.

If you select a worktype that belongs to a different transcription account, you will actually move the voice file to a new transcription account. The report will then be typed in the new transcription account and be made available to the clinical staff for the new account.

So when switching voice worktypes from one transcription account to another, be careful. Make sure that you know what you are doing.

2.2 Reserve Voice Files

One of the most common things that you will do as a transcription manager is reserve work to your employees. When you reserve work, you are assigning voice files to a particular transcriptionist. These voice files will not be accessible by any other transcriptionist while they are in a reserved state.

In order to reserve work, right click on one (or multiple) of the voice files and click on *Reserve To*. You will be presented with a list of the transcriptionists who belong to your organization. Simply click on the name of the transcriptionist to whom you want to reserve the work, and the work will instantly be routed to that MT. (If your list of MT's is extraordinarily long, you can type the first letter of the MT's last name to jump to that section of your MT list.)

2.3 Complete Voice Files

Another thing that you can do as an MT manager is complete voice files directly from the pool or your MT manager view. In order to complete a voice file, simply right click on a voice file (or multiple voice files) and click on *Complete*.

Completing voice files is permanent, so you should always take care completing work. Because of this, you will be prompted to confirm that you would in fact like to complete the voice files, and that you didn't make a silly mistake because you were not paying attention to your work.

2.4 Return to the Pool

While perusing your voice files, you may find that one of your transcriptionists has a bunch of work reserved and does not appear to be working. It is also possible that you made a mistake and reserved work incorrectly. In these situations, you have the ability to return work back to the pool.

In order to return work to the pool, simply right click on a voice file (or multiple voice files) and click on *Return to Pool*. The voice files will be pulled from whichever transcription is currently assigned to work on them and put back into the pool.

2.4 Return to MDinTouch Service

Very rarely, you may find a voice file which you do not feel belongs to one of your physicians. (Or more likely it may belong to one of your physicians, but not for one of your healthcare customers). In these events, you should choose to return the work to the MDinTouch Service. This will send the work back to us so that we can try and figure out where the voice file belongs, and what went wrong. (Most of the time, the physician ended up dictating the case in the wrong account.)

In order to send work back to MDinTouch, simply right click on the voice and click on *Return to MDinTouch Service*.

Chapter 3 - QA

One of the things that you will notice in your Navigation Tree is a section titled *QA*. QA stands for Quality Assurance. When you click on *QA*, a voice file tab will open in your workspace containing all the QA voice files for your accounts.

3.1 How did my voice files get here?

As a transcription manager you may choose to setup one or more of your employees as trainees. When you choose to setup a transcriptionist as a trainee, every voice file that he or she completes will be routed to you for approval. When the voice files are routed to you, they will appear in the QA section.

How do I make someone a trainee!

If you decide that you would like to use Trainees within your organization, you will be able to assign roles for your employees through the *Admin* link on the MTwebtop (www.mtwebtop.com). If you do not see the Admin link, then you will need to speak to an *organization administrator* for your organization.

Although this document does not cover the MTwebtop, you should have no trouble figuring out how to use the webtop to assign roles.

3.2 What can I do with voice files in QA?

Once a voice file has been sent to QA, you can perform all of the functions that you can perform from any of the other voice screens. The two most common things that you will choose to do with your QA voice files is *Play* and *Complete*. You will *Play* the voice file to listen to the dictation and *Complete* the voice file once you are sure that the trainee transcribed the report correctly.

3.3 Does this affect the reports submitted into the system?

It is extremely important to understand that QA voice files have no affect on the reports submitted into the system.

Your transcriptionist trainees, should be instructed to submit all of their reports as incomplete. Or, they can set the option to automatically submit reports as incomplete in their Transcription Account Preferences (see chapter on Preferences for more information on this).

From the QA tab, you can then choose to right click on a voice file and click on *Play*. Then right click on the voice file and click *Find Reports…* A search results screen with all the reports associated to the voice file will appear. From this screen you can view the report (and listen to the voice file).

Make any corrections that are necessary, and then submit the report and complete the voice file. Or if you prefer, you can incomplete the voice file back to your MT with a note letting them know what they did wrong and have them correct the report themselves.

Appendices

Appendix A - Complete Listing of Keyboard Shortcuts

Screen	Function	Shortcut
File Menu	New Report	Ctrl+N
View Menu	Navigation Tree	Ctrl+I
Voice Menu	Select	Ctrl+L
	Select and Create Report	Ctrl+Shift+N
	Complete	Ctrl+T
	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	View/Add notes	Ctrl+O
	Details	Ctrl+D
Window Menu	Selected Voice Files	F9
	Dictation Management	F10
	Unsubmitted Reports	F11
	Patient Management	F12
	Welcome Screen	Shift+F1
Selected - Voice file suspended	Select	Ctrl+L
	Select and Create Report	Ctrl+Shift+N
	Complete	Ctrl+T
	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	View/Add notes	Ctrl+O
	Details	Ctrl+D
Selected - Voice file in Progress	Create report	Ctrl+N
	Suspend	Ctrl+U
	Complete	Ctrl+T
	Mark Incomplete	Ctrl+I
	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	View/Add notes	Ctrl+O
	Details	Ctrl+D
Selected - Voice file in Progress with report attached	Create report	Ctrl+N
	Suspend	Ctrl+U

	Complete	Ctrl+T
	Complete and Submit Reports	Ctrl+Shift+T
	Mark Incomplete	Ctrl+I
	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	View/Add notes	Ctrl+O
	Details	Ctrl+D
Selected - Report attached to voice file	Edit Properties	Ctrl+E
	Edit Text	F8
	Save and Close Document	Ctrl+S
	Submit as Complete	F4
	Submit as Incomplete	Ctrl+F4
	Delete Unsubmitted Report	Del
	Details	Ctrl+D
Reserved/Preferred/Pool	Select	Ctrl+L
	Select and Create Report	Ctrl+Shift+N
	Complete	Ctrl+T
	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	View/Add notes	Ctrl+O
	Details	Ctrl+D
	Highlight All	Ctrl+A
Dictation Management	Select	Ctrl+L
	Select and Create Report	Ctrl+Shift+N
	Complete	Ctrl+T
	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	View/Add notes	Ctrl+O
	Details	Ctrl+D
	Highlight All	Ctrl+A
Unsubmitted Reports	Edit Properties	Ctrl+E
	Edit Text	F8
	Save and Close Document	Ctrl+S
	Submit as Complete	F4
	Submit as Incomplete	Ctrl+F4
	Delete Unsubmitted Report	Del
	Details	Ctrl+D
	Highlight All	Ctrl+A
Rejected Reports	Edit Properties	Ctrl+E
	Edit Text	F8
	Details	Ctrl+D
	Highlight All	Ctrl+A
QA	Select	Ctrl+L
	Select and Create Report	Ctrl+Shift+N
	Complete	Ctrl+T

	Edit	Ctrl+E
	Play	Ctrl+P
	Return To Pool	Ctrl+Shift+R
	Find Reports	Ctrl+F
	View/Add notes	Ctrl+O
	Details	Ctrl+D
	Highlight All	Ctrl+A
Create Report	Transcription Account	Alt+T
	Voice ID	Alt+V
	Order ID	Alt+O
	MRN	Alt+M
	D.O.S.	Alt+D
	Worktype	Alt+W
	Dictating Physician	Alt+P
	Routing Slips	Alt+S
	Routing Slip - Add	Alt+A
	Routing Slip - Remove	Alt+R
	Tag	Alt+G
	Template - Browse	Alt+B
	OK	Alt+O
	Cancel	Alt+N
Select a Transcription Account/Create Patient/	OK	Alt+O
Select a Worktype/Select a Physician	Cancel	Alt+N
Lookup Order	Find Orders	Alt+F
	OK	Alt+O
	Cancel	Alt+N
Lookup Patients	Search	Alt+S
	Clear	Alt+C
	OK	Alt+O
	Cancel	Alt+N
Select Routing Slips	Search	Alt+S
	OK	Alt+O
	Cancel	Alt+N
Template - Open	Open	Alt+O
Template - Word Document	Next Bookmark	F5
	Previous Bookmark	F6
	Return to TouchType2	F8

Appendix B - Screen by Screen Field Descriptions

Voice File Grid

Voice ID: This is the unique MDinTouch ID number for the voice file.
Trans Account: This is the transcription account the voice file belongs to.
Date Received: This is the date and time the voice file was received by the MDinTouch servers.
Dictating Doctor: This is the physician who dictated the voice file.
Duration: This is the length of the voice file.
Status: This is the status of the voice file (i.e. Available, In Progress, Reserved, Suspend, Complete, or QA).
MRN: This is the medical record number of the patient.
Notes: These are the notes attached to the voice file by an MT.
External ID: This is the ID # from an external dictation system.
Ext Creation Date: This is the date and time the voice file was created on the external dictation system.
Worktype: This is the dictation worktype.
Date Started: This is the date and time the voice file was first selected.
MT: This is the transcriptionist who worked on or is currently working on the voice file.
Date Completed: This is the date and time the voice file was completed by the transcriptionist.
Priority: This is the priority of the voice file (i.e. Normal or High - designated by a red symbol).

Voice File Details

General Tab:

Transcription Account: This is the transcription account the voice file belongs to.
Voice ID: This is the unique MDinTouch ID number for the voice file.
Physician: This is the physician who dictated the voice file.
MRN: This is the medical record number of the patient.
Creation Date: This is the date and time the voice file was received by the MDinTouch servers.
Priority: This is the priority of the voice file (i.e. Normal or High).
Duration: This is the length of the voice file in minutes.

Worktype: This is the dictation worktype.
Status: This is the status of the voice file (i.e. Available, In progress, Reserved, Suspend, Complete, or QA).
Date Started: This is the date and time the voice file was selected.
Date Finished: This is the date and time the voice file was completed by the transcriptionist.
MT: This is the transcriptionist who worked on or is currently working on the voice file.
Ext Creation Date: This is the date and time the voice file was created in the external dictation system.
External ID: This is the ID number from an external dictation system.
Incompleted Before?: This is if the voice file has been incompleted by a transcriptionist before or not.

History Tab:
Date: This is the date and time an action on the voice file took place.
Event: This is the action that was recorded (e.g. Voice received, Job selected, Job completed).
Performed By: This is the user that preformed the action on the voice file.

Notes Tab:
Note: This is the note that was attached to the voice file with the date, time, and user who created the note.
Add Note: This is the section where a note can be added to the voice file.

Edit Voice File

Dictating Physician: This is the physician who dictated the report.
Worktype: This is the dictation worktype.
MRN: This is the medical record number of the patient.
Priority: This is the priority of the voice file (i.e. Normal or High).

Report Grid

Transcription ID: This is the report ID number, not to be confused with the version ID number which is the ID number assigned for each modification of the report.
Trans Account: This is the transcription account to which the report belongs.
Dictating Doctor: This is the physician who dictated the report.

MRN: This is the medical record number of the patient.
Patient Name: This is the name of the patient.
Submit Status: During report submission, this section displays if there are any errors which would prevent your report from being successfully sent to the MDinTouch servers.
Creation Date: This is the date the report was created.
Worktype: This is the report worktype, not to be confused with the dictation worktype.
Voice ID: This is the ID number of the voice file that corresponds to this report.
Order ID: This is the ID number of the order that corresponds to this report.
Tag: This is the "comment" field which can be used for different types of user defined information (e.g. The type of examination, the external MRN for a patient, etc.)
Status: This is the status of the report (i.e. Unsigned, Signed, Rejected or Incomplete).
Sign Date: This is the date that the report was electronically signed.
Transcriptionist: This is the transcriptionist that last edited the report in TouchType2.
Date of Service: This is the date that the patient was seen or had the procedure performed.
Modified: This is the date and time that the report was last modified. Modifications include edits and electronic signatures.
Routing Slips: These are the physicians or facilities that will get an automatic fax of the report and/or be able to access the report online.
Last Note Date: This is the date and time the last note was added onto the report.

Create Patient

Transcription Account: This is the transcription account in which the patient is being created.
MRN: This is the medical record number of the patient.
Last Name: This is the patient's last name.
First Name: This is the patient's first name.
Middle Name: This is the patient's middle name.
Date of Birth: This is the patient's date of birth.
SSN: This is the patient's social security number.
Gender: This is the patient's gender.
Mother's Maiden Name: This is the patient's mother's maiden name.
Nationality: This is the patient's nationality.
Religion: This is the patient's religious preference.

Create Report

Transcription Account: This is the transcription account in which the report is being created.
Voice ID: This is the ID number of the voice file that corresponds to this report.
Order ID: This is the ID number of the order that corresponds to this report.
MRN: This is the medical record number of the patient.
D.O.S.: This is the date of service or the date that the patient was seen or had the procedure performed.
Worktype: This is the report worktype, not to be confused with the dictation worktype.
Dictating Physician: This is the physician who dictated the report.
Routing Slips: These are the physicians or facilities that will get an automatic fax of the report and/or be able to access the report online.
Tag: This is the "comment" field which can be used for different types of user defined information (e.g. the type of examination, the external MRN for a patient, etc.).
Template: This is the Microsoft Word report template that you will use to type the report.

Report Details

General Tab:

Trans Account: This is the transcription account to which the report belongs.
Trans ID: This is the report ID number, not to be confused with the version ID number which is the ID number assigned for each modification of the report.
Voice ID: This is the ID number of the voice file that corresponds to this report.
Patient MRN: This is the medical record number of the patient.
Patient Name: This is the name of the patient.
Worktype: This is the report worktype, not to be confused with the dictation worktype.
Dictating Doctor: This is the physician who dictated the report.
Template: This is the Microsoft Word report template that was used to type the report.

Order Tab:

The order tab contains data that is usually populated by data that has come directly from your health care customer's source information system. The data usually is transmitted via interfaces into TouchType. For this reason, you will most likely never have to enter or edit any data in the Order Tab.

Account Number: This is the patient account number from the originating system
Admission Date: This is the date the patient was admitted into the facility.
Assigned Bed: This field may hold different data depending on the specific interface and/or customer.
Assigned Building: This field may hold different data depending on the specific interface and/or customer.
Assigned Floor: This field may hold different data depending on the specific interface and/or customer.
Assigned Loc Description: This field may hold different data depending on the specific interface and/or customer.
Assigned POC: This field may hold different data depending on the specific interface and/or customer.
Assigned Room: This field may hold different data depending on the specific interface and/or customer.
Creation Date: This is the date the order was created or received through an interface.
Date of Service: This is the date of service or the date that the patient was seen or had the procedure performed.
Discharge Date: This is the date the patient was discharged from the health care facility.
Encounter ID: This field may hold different data depending on the specific interface and/or customer.
Entered By: This field may hold different data depending on the specific interface and/or customer.
Entering Organization: This field may hold different data depending on the specific interface and/or customer.
Entry Location: This field may hold different data depending on the specific interface and/or customer.
Global Order ID: This is the MDinTouch unique identifier for an order.
Order ID: This is the ID number of the order from the originating system.
Ordering Physician: This is the physician who ordered the study or examination.
Patient: This is the patient's name.
Result Status: This field may hold different data depending on the specific interface and/or customer.
Study Description: This field may hold different data depending on the specific interface and/or customer.
Tag: This field may hold different data depending on the specific interface and/or customer.
Trans Account: This is the transcription account to which the order belongs.

Routing Slips Tab:

Routing Slips: These are the physicians or facilities that will get an automatic fax of the report and/or be able to access the report online.

Notes Tab:

Note: This is the note that was attached to the report with the date, time, and user who created the note.
Add Note: This is the section where a note can be added to the report.

History Tab:

Date: This is the date and time an action on the report took place.
Version ID: This is the version ID number which is assigned for each modification of the report, not to be confused with the Transcription ID number.
Event: This is the action that was recorded. (e.g. New report created).
Performed By: This is the user that preformed the action on the report.

Report Properties

Transcription Account: This is the transcription account to which the report belongs.
Transcription ID: This is the report ID number which is assigned for each transcription thread. This number represents the entire lifecycle of the transcrption (not to be confused with the version ID number which is assigned for each modification of the report).
Patient MRN: This is the medical record number of the patient.

General Tab:

Voice ID: This is the ID number of the voice file that corresponds to this report.
Worktype: This is the report worktype, not to be confused with the dictation worktype.
Dictating Physician: This is the physician who dictated the report.
Tag: This is the "comment" field which can be used for different types of user defined information (e.g. The type of examination, the external MRN for a patient, etc.).
Template: This is the Microsoft Word report template that was used to type the report.

Order Tab:

Order ID: This is the ID number of the order that corresponds to this report.
D.O.S.: This is the date that the patient was seen or had the procedure performed.
Study Description: This field may hold different data depending on the specific interface and/or customer.
Entered By: This field may hold different data depending on the specific interface and/or customer.

Entered Location: This field may hold different data depending on the specific interface and/or customer.
Entering Organization: This field may hold different data depending on the specific interface and/or customer.
Assigned POC: This field may hold different data depending on the specific interface and/or customer.
Assigned Building: This field may hold different data depending on the specific interface and/or customer.
Assigned Floor: This field may hold different data depending on the specific interface and/or customer.
Assigned Room: This field may hold different data depending on the specific interface and/or customer.
Assigned Bed: This field may hold different data depending on the specific interface and/or customer.
Assigned Location Description: This field may hold different data depending on the specific interface and/or customer.
Date of Admission: This is the date the patient was admitted into the facility.
Date of Discharge: This is the date the patient was discharged from the facility.

Routing Slips Tab:

Routing Slips: These are the physicians or facilities that will get an automatic fax of the report and/or be able to access the report online.

Appendix C - Minimum System Requirements

Minimum System Requirements
*500- MHz processor
*Windows®2000 SP4
*256 MB of RAM
*1024X768 resolution display 16-bit color
*Microsoft Word® 2003
*Microsoft .NET Framework 1.1
*MDinTouch UpdateAgent

Recommended system configuration
*1.0GHz or faster processor
*WindowsXP Pro
*512 MB of RAM
*500MB free Hard Drive space
*1024X768 resolution display, 32-bit color
*Microsoft Word® 2003
*Microsoft .NET Framework 1.1
*MDinTouch UpdateAgent