TouchType 5

mdintouch

July 2011

User Guide for MT

TouchType5: User Guide for MT

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Chapter 1

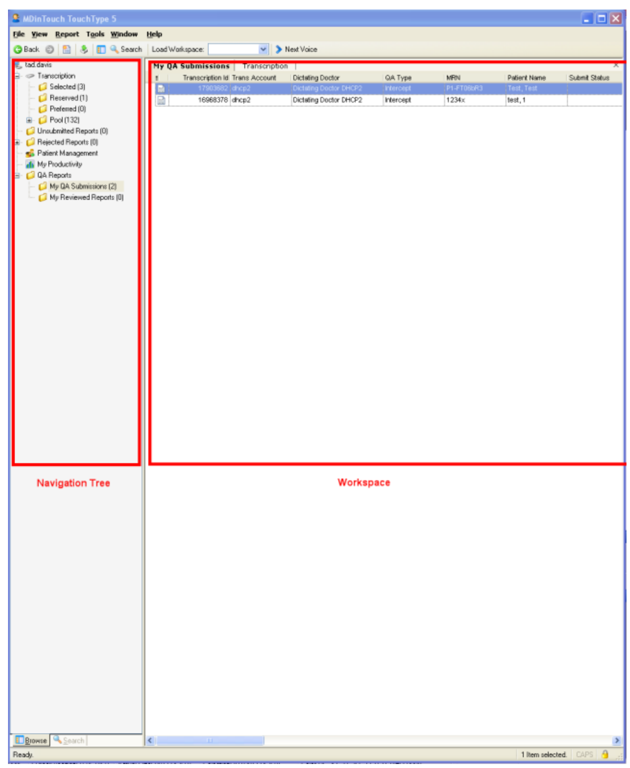
Screen Overview

An introduction to TouchType 5 describing the different functionality of the Navigation Tree and Workspace.

One of the first things that you will notice when logging in to TouchType5 (TT5) is that the screen looks very similar to older versions of TouchType.

The TouchType5 application is split into two main areas, the **Navigation Tree** and the **Workspace**.

The Navigation Tree can be found on the far left of the TouchType5 screen. The Navigation Tree is the best way to 'browse' any particular TouchType5 function. The Navigation Tree is broken down into several sections'; each section consisting of one or more folders. In order to view the folder within a section, click the plus (**+**) sign next to the section name.



The sections which will be displayed in the Navigation Tree depend entirely on your login access level. As you click on any section, a tab (shown across the top) for that section will be opened in the workspace.

The six Transcriptionist sections displayed in the Navigation Tree are: Transcription, Unsubmitted Reports, Rejected Reports, Patient Management, QA Reports, and My Productivity.

Transcription

The **Transcription** section contains all of the active voice files for your transcription accounts. This section is most likely where you will spend the majority of your time while working in TouchType5. When you select the Transcription section in the navigation tree, a transcription summary tab will open in the Workspace to the right. The summary tab provides information as well as quick links to the four folder items within the Transcription section.

Clicking on any of the quicklinks or clicking directly on a folder item in the Navigation Tree will open a corresponding tab in your Workspace. The four items available within the Transcription Section are: Selected, Reserved, Preferred, and Pool.

The **Selected** tab contains any voice files which you have selected to transcribe. Any voice files that are listed in the selected tab are exclusively in use by you and will not be available to other transcriptionists who work on your accounts. A green arrow designates the voice file which you currently have in progress.

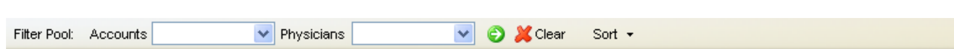
In addition, you will find an 'Auto Select' button at the top of the Selected tab. When this button is activated (designated by a visible border around the button), TouchType5 will select your next available voice file as you complete the voice file you have in progress. You can turn Auto Select on and off by simply clicking on the Auto Select button.

The **Reserved** tab contains any voice files which your transcription manager has reserved for you. Voice files are reserved exclusively to you and will not be available for other transcriptionists who work on your accounts. Voice files in the Reserved tab are considered the highest priority when using the auto select feature of TouchType5.

The **Preferred** tab contains any voice files which your manager prefers that you transcribe. Voice file preferences are created by your transcription manager through the use of Preferred Rules. Preferred Rules can be based on voice worktype, dictating physician, or both. Voice files in the Preferred tab are not exclusively available to you. Any transcriptionist who has access to that account will be able to select voice files that appear in your Preferred tab. Voice files located in the Preferred tab are considered the next highest priority when using auto select.

The **Pool** tab contains the remainder of the jobs in your voice pool. As with the Preferred tab, voice files in the Pool are available to any transcriptionists who have access to your accounts.

Two features of the voice pool which are not available in the other Transcription tabs are the ability to filter and the ability to sort.



In order to filter the voice pool, simply choose from the available selections in the **Accounts** and/or **Physicians** dropdown boxes at the top of the tab. Once you have made your selection, click the green arrow to the right of the dropdown boxes.

In order to sort the pool by a particular column, simply click the **Sort** dropdown button and select the column by which you would like to sort. Once you make your selection the voice pool will sort according to your choice.

The navigation tree allows you to quickly and efficiently browse your pool, separated by either account or dictating physician. In order to browse the pool, simply click on the **Pool** folder item in your Navigation Tree. TouchType5 will open two options: By Account and By Dictating Physician.

If you prefer to browse by account, click on the **By Account** folder item. The Navigation Tree will expand to include a list of available accounts from which to select. Select the account which you would like to browse and a tab for that account will open in your TouchType5 workspace.

If you prefer to browse by dictating physician, click on the **By Dictating Physician** folder item. A list of available dictating physicians will be displayed in the Navigation Tree. Make a selection from the list in order to open a tab for that particular physician.

By Account and By Dictating Physician
The By Account and By Dictating Physician folders only show accounts and dictating physicians who have available voice files in the pool. In other words, this is not a list of all accounts or dictating physicians to which you have access.

Unsubmitted Reports

The **Unsubmitted Reports** section can be found in the Navigation Tree below the Transcription section. When you select this section, an Unsubmitted Reports tab is opened in your TouchType5 workspace to the right of the Navigation Tree. The Unsubmitted Reports tab contains any newly transcribed reports which have not yet been submitted from your PC. The reports in this tab are permanently stored on your computer until either submitted (F4 or Crtl+F4) or deleted (right click and choose delete option) from your PC.

The Unsubmitted Reports tab also contains any reports which you have opened for editing but have not yet submitted. Any changes made to the reports listed are temporary copies available only to you and residing only on your local computer. Any reports from this tab can be deleted without affecting the current version of the report on the server.

Deleting from Unsubmitted Folder

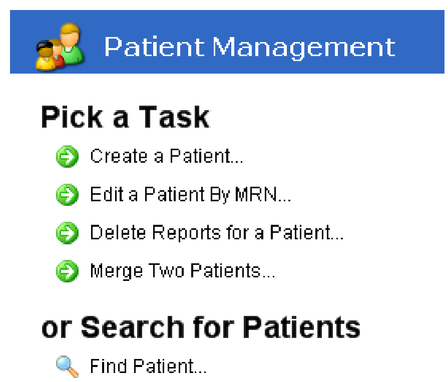
If you open a report for editing by mistake or subsequently decide that no changes need to be made, you should delete it from the Unsubmitted Reports tab rather than submitting the report.

Rejected Reports

The **Rejected Reports** section is located just under the Unsubmitted Reports section. When you click on this section, a Rejected Reports tab opens in your TouchType5 workspace. The Rejected Reports tab lists any reports that have been rejected by your dictating physicians. Reports can be opened for editing, corrected, and then submitted back to the server for review by the dictating physician.

As with the voice pool, the Rejected Reports section allows you to browse your rejected reports. The browse options in Rejected Reports are: **By Account, By Dictating Physician,** and **By Transcriptionist**. In order to browse by any of these options, simply click on the appropriate folder item and the tree will expand to include a list of available items. Click on the desired item in the list in order to open a tab containing the rejected reports for that item.

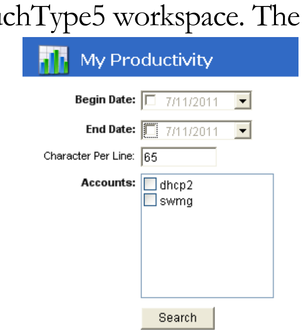
Patient Management



The **Patient Management** section is located at the bottom of the Navigation Tree. When you select Patient Management, a patient management summary tab is opened in your workspace. From the Patient Management tab you can create new patients, edit patient demographics, delete reports for a patient, and merge two patient records into one.

My Productivity

The **My Productivity** section is located just below Patient Management. When you click on this section, a My Productivity tab opens in your TouchType5 workspace. The My Productivity allows you to enter a begin and end date, characters per line and to choose an account. Enter your criteria and click the **Search** button. Results will be returned showing how many reports you submitted during the timeframe specified. By default, the results are shown by Worktype. Click on the MD/Worktype, MD/No Worktype, MT/Worktype or MT/No Worktype link to breakdown the report by those categories. For an MT, the MT links will only return results for that individual MT.



QA Reports

Early versions of TouchType supported a very rudimentary QA workflow whereby an MT would submit a document as incomplete and a QA Editor (QAE) or manager would periodically work through the incomplete documents. The new versions of TouchType have added significant support for more sophisticated QA workflow. The following is important to understand for this section. When a report is submitted to QA it goes into Review status, when it is selected for QA by a QAE, it goes into Reviewing status, if it is then assigned to the MT it will go to Reviewed status. Many MT managers have their QAEs submit the documents directly back to the customer as Complete instead of sending to the MTs in order to minimize turnaround times. For further details, see QA Workflow under Creating a Report.

The **QA Reports** section contains **My QA Submissions** and **My Reviewed Reports**. When you click My QA Submittions, a list of all reports which you submitted to QA which are currently in QA Review status will be returned. When you click My Reviewed Reports, a list of all reports which you submitted to QA which are in QA Reviewed status will be returned. Note that many MT managers have a policy whereby reports are not submitted back to MTs in which case the My Reviewed Reports will always be empty.

Chapter
2

Organizing your Workspace

Using customized Workspaces so you can do your work in the most organized and efficient way for you.

In the screen overview chapter, we discussed the various tabs which can be opened in the Workspace. Working with so many different tabs open at one time can be confusing. For this reason, TouchType5 has been designed in a way which will allow you to completely customize your workspace layout to allow you to operate in the most organized and efficient manner possible.

Working with Tabs

By default, TouchType5 opens one tab for each section in the Navigation Tree. As you click on any folder items within a section, the tabs in your TouchType5 Workspace are replaced with data from your most recent selection. For example, if you click on **Transcription**, the transcription summary tab is opened. If you then click **Selected**, the transcription summary tab is replaced by the selected tab. Similarly, if you then click on **Pool**, the selected tab is replaced by the pool tab.

So, what do you do if you want to view more than one tab within a section? TouchType5 allows you to open as many tabs as you like. By right clicking on a folder item, and then selecting **Open in New Tab** you have the ability to open as many tabs as you would like in your workspace.

It may take some time to get used to the multi-tabbed layout of TouchType5, but once you have become accustomed to working with tabs, you will be able to take full advantage of the flexibility of TouchType5.

Try it Yourself!

In order to learn more about how to work with tabs, follow the exercise below. Make sure to close any open tabs before beginning.

1. Click on **Transcription**

2. Then click on **Unsubmitted Reports**

3. Next, click on **Rejected Reports**

4. Finally, click on **Patient Management**

Notice that you will have four tabs open in your Workspace. Now, try clicking on the various folder items beneath each section in the Navigation Tree.

Note: Any time you select a different folder item in the Navigation Tree, no new tabs are opened. The tab for that section is simply replaced with the data from the folder item you selected.

Now, close all the tabs by clicking the grey **X** in the upper right corner of the tabs.

WARNING! Don't confuse the grey **X** with the red **X** to close the application. If you click the red **X** then the whole application will shut down, and you will have to login again.

Next, do the following:

1. Click on **Transcription**

2. Now, right click on **Selected** and select **Open in New Tab**

3. Next, right click on **Reserved** and select **Open in New Tab**

4. Then, right click on **Preferred** and select **Open in New Tab**

5. Finally, right click on **Pool** and select **Open in New Tab**

Notice that now, instead of replacing the tabs, you have five different tabs open; each tab representing a different folder item within Transcription. Now notice that as you click on each folder item in the Navigation Tree, TouchType will automatically jump to the correct tab in your workspace.

Continue to experiment with tabs by browsing By Account and By Dictating Physician in new tabs.

Tab Groups

One of the ways that TouchType5 allows you to more effectively organize your Workspace is through the use of tab groups. Tab groups allow you to organize your workspace into either vertical or horizontal tabbed grouping levels. This can be a very effective way of providing a split screen view so that you can monitor several different aspects of your work at one time.

Creating a tabbed group is quite simple. Just right click on a tab and select **New Horizontal Tab Group** or **New Vertical Tab Group**. There is no limit to the number of horizontal or vertical tab groups that can be opened on your TouchType5 screen.

Try it Yourself!
In order to learn more about how to create tab groups, follow the exercise below. Make sure to close any open tabs before beginning.

1. Click on **Transcription**
2. Click on **Rejected Reports**
3. Right click on **Rejected Reports** in the Workspace
4. Select **New Horizontal Tab Group**

Note that your Workspace is now split into two different tab groups.

5. Click on **Unsubmitted Reports**

Note that the Unsubmitted Reports tab opened in your bottom tab group. If you would like to add the tab to the top group, make sure that the focus is on the top tab group prior to step 5.

6. Right click on **Unsubmitted Reports**
7. Select **New Horizontal Tab Group**

Note that now your workspace has been split into three different tab groups. You can easily resize each group by clicking on the dividing bar between each tab group and then dragging the mouse up or down.

Continue to experiment with tab groups by opening the Selected, Reserved, and Preferred in their own horizontal tab group.

Once you have created one or more tab groups, you can easily arrange your tabs in whichever order you prefer. In order to arrange your tabs, simply click on the tab drag the mouse to the location where you would like your tab to be located. You can change the tab order within a tab group, or you can drag tabs from one tab group to another.

Saving Your Workspace

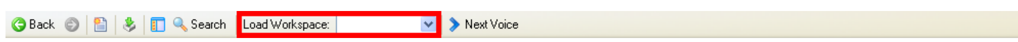
Once you have spent hours organizing, re-organizing, adjusting, and fine tuning your Workspace so that it looks exactly the way you want, the next obvious question is, "am I going to have to do this every time I login to TouchType5?" Fortunately, the answer is NO! TouchType5 allows you to save and manage your Workspaces so that once you have created a workspace, you will not have to recreate it ever again.

Managing your Workspaces is done through the **Window, Workspace** menu item. Through this menu item you can either save or delete Workspaces from your system.

In order to create a new Workspace:

1. Organize your TouchType window exactly how you would like it to appear
2. Click **Window**
3. Click **Workspace**
4. Click **Save Workspace As**
5. Type a name for your Workspace
6. Click **OK**

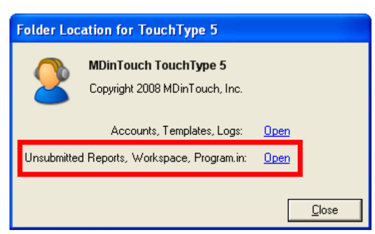
Once you create a Workspace, you can load it any time you wish by selecting it from the **Load Workspace** dropdown box on the toolbar (as shown below). In addition, all of your saved Workspaces are available directly from the Welcome Screen when you first load TouchType5.



New in TouchType 5: Folder Location Access

In order to directly access the folders which contains Accounts, Templates, Logs and Unsubmitted Reports, Workspaces, and Program settings, choose the **Help, Folder Location** menu item.

Whenever you create a new workspace, a corresponding XML file is saved in your TouchType5 Workspaces folder. To access this folder, choose the **Help, Folder Location** menu item. Click the appropriate **Open** link, then double click the Workspaces folder.



You can share your workspaces with co-workers by emailing them the XML files located in this folder if you are both using the same version of TouchType. Your co-workers can then copy the XML files into their TouchType5 Workspaces folder. The Workspaces instantly appear in the **Load Workspace** drop down box.

If you would like to remove a workspace, you can easily delete workspaces through the **Window, Workspace** menu item.

In order to delete a workspace:

1. Click **Window**
2. Click **Workspace**
3. Click **Delete a Workspace**
4. Click on the workspace you would like to delete
5. Click **Delete**
6. Click **OK**

Try it Yourself!

In order to learn more about how to manage your workspaces, follow the exercise below.

1. Open several tabs and arrange them into tab groups
2. Click **Window**
3. Click **Workspace**
4. Click **Save Workspace As**
5. Type *My Workspace* in the name textbox
6. Click **OK**

Now close all of your tabs by clicking the grey **X** in the upper right corner of each tab.

From the Load Workspace dropdown box, select **My Workspace**. Notice how your workspace loads.

Continue to experiment with workspaces by creating an 'Empty' workspace (all tabs closed). Switch back and forth between the Empty workspace and the My Workspace workspace.

Chapter 3

Working with Voice Files

Understanding how to select, play, edit, and take actions on voice files.

In the preceding chapter, you became familiar with navigating through the TouchType5 screens. You also learned how to save your workspace. Hopefully, you are now comfortable with the software and are ready to get to work!

In TouchType5, workflow is primarily driven by voice files. Voice files can be found in any of the tabs opened under the Transcription section of Navigation Tree (i.e., Selected, Reserved, Preferred, and Pool). In addition, you can locate voice files on search results screens (see "Searching for Voice Files").

There are several different actions that you can take on a voice file. At any time, you can see which actions are available on a voice file through the context menu. Context menu is another term for 'right click', so if you simply right click on a voice file in your workspace, you will see a list of everything that you can do to a voice file.

In addition, there are keyboard shortcuts for all the different actions that you can take on a voice file. You can reference the appendix for a complete listing of keyboard shortcuts for TouchType5.

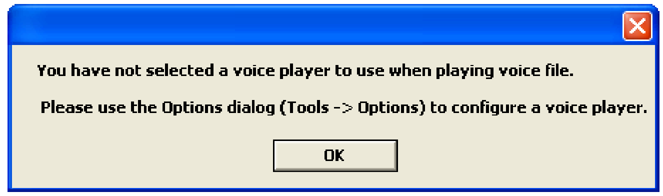
The remainder of this chapter identifies and describes the various actions that a transcriptionist can perform on a voice file.

Selecting a Voice File

The first and most common step in working with voice files in TouchType5 is to *select* a voice file. Selecting a voice file simply means that you are going to pick a voice file that you wish to transcribe.

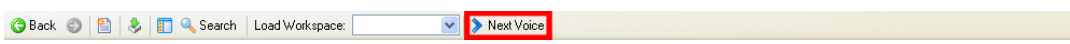
When you select a voice file, the voice file is moved to the My Selected transcription tab. Once you have selected a voice file, that voice file is no longer available to any other transcriptionists who also work on your account. After selecting a voice file, your voice player will launch and begin playing the voice file.

If you have not assigned a Voice Player to TT5 you will get an error message (as shown below). To assign your voice player click on **Tools, Options**. In the window that appears, click the **Browse** button and go to the folder containing your voice player. Click the voice player executable and then click **Ok**. Click **Ok** again and your voice player will be associated with TT5.



You may note that you can have many voice files in your selected tab at one time. In order to distinguish between voice files, you will notice that the voice file which is currently in progress will be displayed with a green arrow to the far left of the voice file row.

There are several different ways to select a voice file in TouchType5. The best way to select a voice file is by clicking the **Next Voice** icon on your toolbar. The next voice function automatically locates the next voice file that should be selected. It first checks your Reserved Jobs, then checks your Preferred jobs, and then finally checks the Pool. Get next voice considers priority and aging of voice files when making a selection.



You can also choose to manually select voice files. Right clicking on a voice file record and then left clicking on select will manually select a voice file.

There is an additional manual option for selecting a voice file called **Select and Create Report**. This option will be discussed in detail in a future chapter.

Completing a Voice File

Assuming that you have successfully selected a voice file and have transcribed the report (creating reports is covered in a future chapter), the next obvious step is getting rid of the voice file. In TouchType5, this is called *completing* the voice.

Completing a voice file means that you have listened to the voice file and typed a report. You have decided that you do not need this voice file anymore. If for any reason you have not finished working with the voice file, do not complete it. You do have many other options described below.

Once you complete a voice file, there is no way to un-complete it. Of course, if you complete a job by accident, you will be able to search for the voice file and listen to it through a voice search. However you will not be able to put the job back in the pool.

In order to complete a voice file, simply right click on the voice file and click on **Complete**.

Suspending a Voice File

TouchType5 contains several features which help you manage voice files when you run into problems and you cannot complete your work immediately.

A common problem that customers experience is that they get interrupted while transcribing a report. Many times, they may start listening to a voice file and realize that they do not have all the information that they need to complete the job. In these situations, transcriptionists usually *suspend* a voice file.

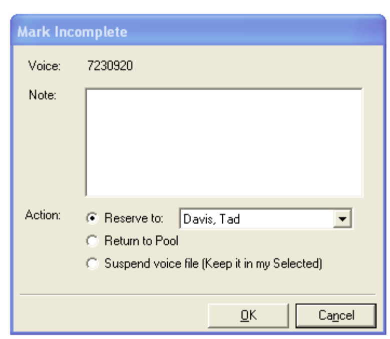
We sometimes refer to suspending a voice file as the 'I'll do it later' option. Suspending a voice file simply means that you are going to leave the voice file in your selected tab, but you are going to pick something else to work on for the time being.

In order to suspend a voice file, simply right click on the voice file and click on **Suspend**.

Marking a Voice File Incomplete

Sometimes, you may come across a voice file that you cannot complete. In these instances, you do not want to suspend the voice file; you just want to get rid of it! You can remove any dictation from your Selected tab by *incompleting* it.

Incompleting Voice Files
A transcriptionist can only incomplete a dictation that is currently in progress.



When you use the incomplete option, you have a choice of where you would like the voice file to go. You can choose to return the voice file back to the pool so that it is available for any other transcriptionist who works on your account. This choice is most often used when a voice file is selected by mistake.

You may also choose to incomplete the voice and send it directly to a particular person. This is particularly useful when you have a well established workflow for how to handle problem voice files.

In order to incomplete a voice file, simply right click on the voice file, and click on **Mark Incomplete**. A mark incomplete window will appear. The first thing that you will see is a large text box for a note. All incomplete voice files require a note. You should type a meaningful note in this text box. This note will pop up any time someone selects this voice file in the future

Just below the note text box, you will find your routing options for the voice file:

The first option is **Reserve To:** If you choose this option, you will be required to select from the available transcriptionists in the dropdown box to the right. Only transcriptionists who have access to that particular voice file worktype will be available in your dropdown box.

The second option is **Return to Pool**. If you select this option, then the voice file will be sent back to the pool and will be available for anyone.

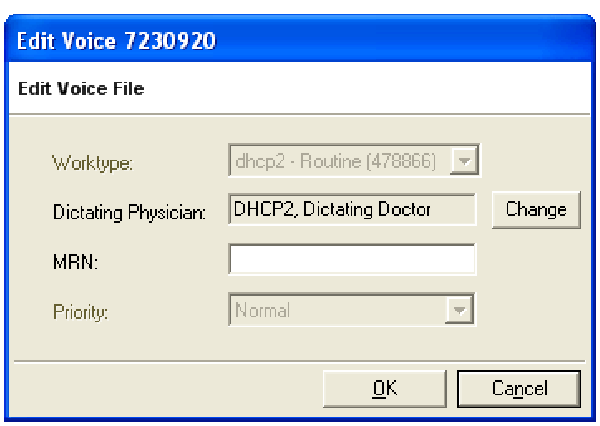
The third option is **Suspend voice file (Keep it in my Selected)**. If you select this option, the voice file will remain in your Selected tab.

After selecting the option that you prefer, click the **OK** button in order to route your voice file.

Editing a Voice File

You may come across a situation where the data regarding your voice file is incorrect and needs to be corrected. For example, a physician may have dictated a voice file under the wrong patient number or under a different physician id. In these situations, TouchType5 provides the ability to edit the data associated with a voice file.

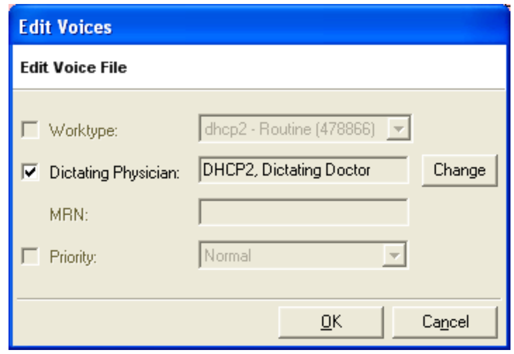
In order to edit the data associated with a voice file, simply right click on the voice file and click on **Edit**. You will have the choice to edit the dictating physician or MRN.



The list of dictating physicians is generated based on your user access. If you come across a situation where you cannot select the correct dictating physician you should incomplete the voice file back to your manager so that they can handle the editing. If the worktype or priority on a voice file requires editing you should incomplete the voice to your manager for editing.

Oftentimes, when a dictating physician makes a mistake, he/she does not make a mistake on only one voice file but multiple files. Instead of editing these voice files one at a time, TouchType5 provides the ability to group edit voice files. In order to edit a group of voice files, highlight all of the voice files that you wish to edit. Then right click anywhere within the selected range and click on **Edit**.

There are a couple of differences between the group edit and the single edit screens. These differences are safety features designed to protect you from making mistakes. First, you will notice that when group editing, you cannot edit MRN. Second, you will notice a check box next to **Dictating Physician**. This checkbox is an extra confirmation measure. You must first check the checkbox and then you will be able to choose the correct dictating physician.



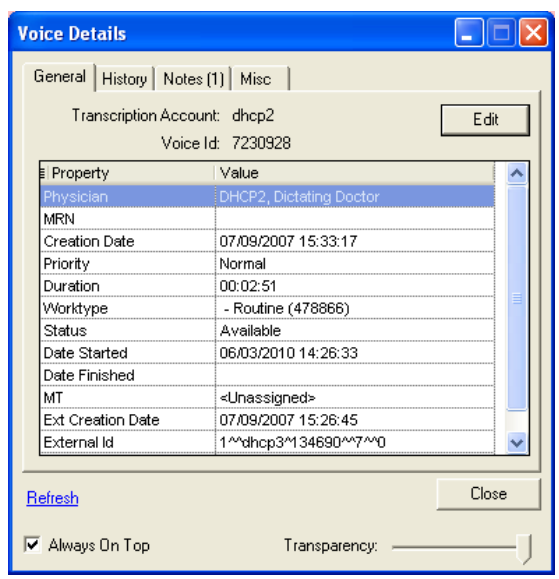
When editing single or multiple voice files, once you make the necessary corrections, click the **OK** button to save your changes.

Playing a Voice File

Sometimes you may not want to select a voice file, you simply want to listen to it. If you want to listen to a voice file without selecting it, simply right click on the voice file and click **Play**.

Voice File Details

One of the benefits of using TouchType5 is that everything about a voice job is tracked. For example, who dictated the voice, when the first transcriptionist started working on the voice, if anyone edited the voice, any notes of the voice, etc. are all tracked. You can view all of the information about a voice file through the voice file details window.



In order to view the voice file details, simply right click on the voice file and click on **Details**. After clicking this option, a window with four tabs will open. The four tabs are General, History, Notes, and Misc.

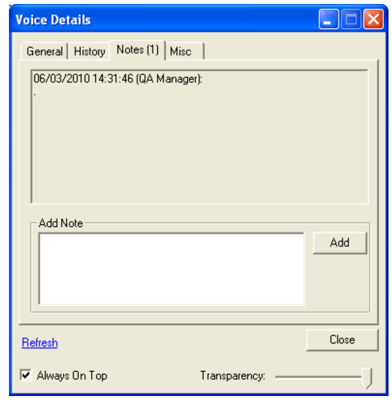
The **General** tab contains all of the

properties of the voice file. See the following listing for details.

Physician -	The dictating physician for the voice file
MRN -	The medical record number for the voice file if provided
Creation Date -	The date that the voice file was sent to MDinTouch
Priority -	The priority on the voice file (high or standard)
Duration -	The length of the voice file in hh:mm:ss format
Worktype -	The dictation worktype assigned at the time of dictation
Status -	The status on the voice file (available, reserved, selected, in progress, suspended)
Date Started -	The date/time that the voice file was first selected
Date Finished -	The date/time the voice file was completed
MT -	The MT who completed the last action on the voice file
Ext Creation Date -	The date/time the voice file was created on the external dictation system (ex. DVI box, Downloaded to the PC, etc.)
External ID -	The original file name of the voice file before it came to our servers
Incompleted Before -	A flag which indicates whether this voice file has ever been incompleted before

The **History** tab contains all of the actions that any user has taken on a voice file. This tab includes the date/time of an event, the type of event, and who performed the event.

The **Notes** tab contains a list of all the notes which have been added to a voice file. In addition to viewing the notes, you can add a note directly into the voice details window. Simply type the note in the **Add Note** window and click **Add**. Because notes are used so frequently, we have added an additional context menu option to jump right to the



notes window from a voice file. Simply right click on the voice file and click on **View/Add Note**.

The **Misc** tab contains information than can be used by the Customer Support Group to debug problems and can be ignored.

Underneath the four tabs, you are presented with the following options: Refresh, Always on Top, and Transparency. Click **Refresh** to load the most current data regarding your voice file. Click **Always on Top** if you would like the voice file details box to remain on top of every other window. Use the **Transparency** slider to see what is behind your Voice Details screen in the event that you have chosen Always on Top.

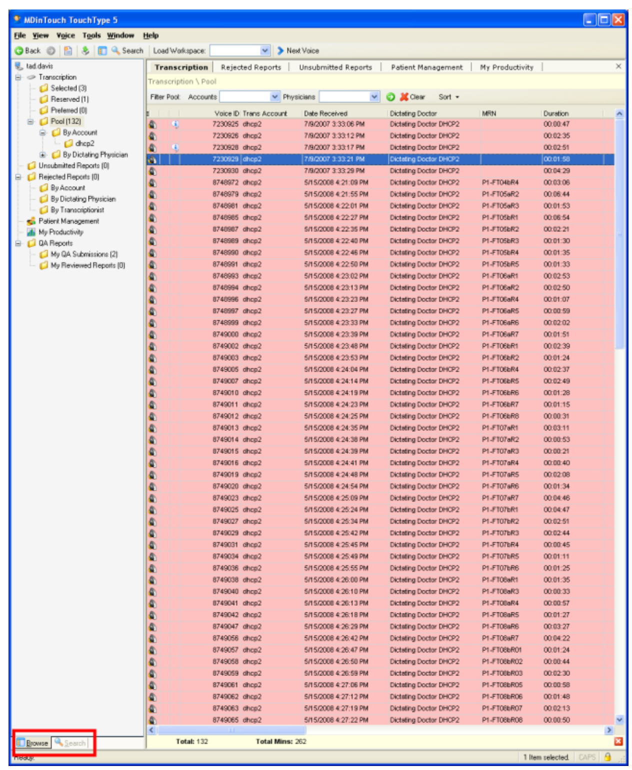
Chapter 4

Searching for Voice Files

Finding a specific voice file by multiple criteria.

Now that you know how to work with voice files, the next thing that we should teach you is where to find them. So far, the only places that you have seen voice files are through the Transcription tab in the Navigation Tree (Selected, Reserved, Preferred, Pool). There is in fact another way to locate voice files; specifically, through the use of the **Search** tab.

If you look very closely at the bottom of the Navigation Tree, you will see two tabs: Browse and Search. So far, everything that we have discussed has been in the context of the Browse Tab. However, there is more to TouchType5 than browsing. By clicking on the **Search** tab, the Navigation Tree will be replaced by a Search pane. This Search pane is where you will go whenever you need to locate a voice file or a specific set of voice files.

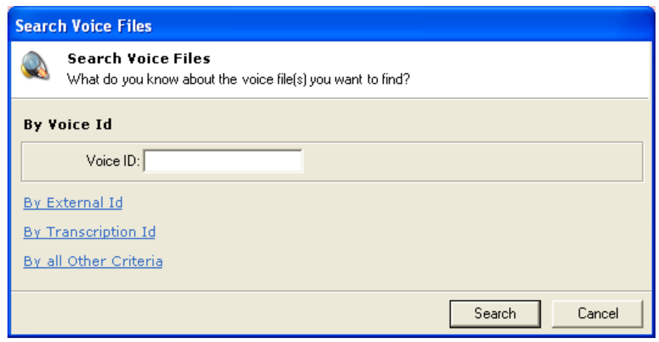


The Search pane contains several different search types broken down into two categories: Search Voice Files and Search Reports. The remainder of this chapter is dedicated to learning how to use Search Voice Files.

Searching By Voice ID

The simplest type of search is searching by voice id. You would use this search when you know exactly what you are looking for. Perhaps one of your colleagues called you and said, "Hey I am having a problem with Voice #12345." Or you had jotted a voice file number down on a piece of paper to look into at some later point of time. Whatever the reason, if you know your voice file id, then searching **by voice id** is exactly what you need.

In order to search by voice id, simply click **by voice id** under the Search Voice Files options in the Search pane. A search voice files box will pop up. Enter the **Voice ID** in the text box and click the **Search** button. A new tab titled 'Voice Search Results' will be opened in your TouchType5 workspace. If you entered the correct voice file id, this tab will contain one voice file. From your search results, you have the ability to work with the voice file in any way you choose. You can right click on this voice file and select it, suspend it, reserve it, etc; just as if it were in the pool.



Restrictions on Modifying Voice Files
You may find that sometimes you cannot select, reserve, or edit a voice file from search results. This will happen when the voice file in your search results has already been completed.

Searching By External Id

Another method of searching for voice files is searching **by external id**.

In order to understand what an external id is, it is first important to understand how a voice file gets into our system.

Doctors usually dictate voice files into our system using one of two methods: handheld dictation devices or telephone based dictation. In either situation, a unique voice file id (across all accounts, over all time) is assigned when the voice file is first created. When the voice files are sent to our server and loaded onto TouchType5, we assign our own unique id number. The number that we assign is the *voice file id*. The original number that the handheld or phone system assigns is called the *external id*.

So, now that you know what an external id is, how will you know when to search by it? Most likely, the only times you will need to search by external id is if you have an interface to TouchType from your own voice dictation system. You might also use external id if a doctor tells you that he has a confirmation number or a file name that he pulled off of his computer. These files names and confirmation numbers are all external ids.

In order to search by external id, simply click **by external id** under Search Voice Files options in the Search pane. A search voice files box will pop up. Enter the **External ID** in the text box and click the **Search** button. Once you click Search, a new tab titled 'Voice Search Results' will be opened in your TouchType5 workspace containing any voice files which were found as a result of your search.

Searching By Transcription Id

Another useful way to locate dictations is searching by **transcription id**. A transcription id is a unique identifier for a transcribed report. Every report submitted into our system is assigned a transcription id. When you choose to search by transcription id, you are essentially finding all the voice files associated with a report.

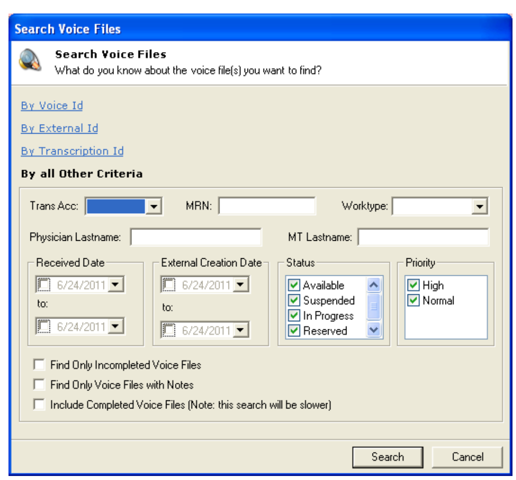
In order to search by transcription id simply click **by transcription id** under the Search Voice Files options in the Search pane.

A search voice files box will pop up. Enter the transcription id in the text box and click the **Search** button. Once you click search, a new tab titled 'Voice Search Results' will be opened in your TouchType5 workspace containing any voice files which were found as a result of your search.

Searching By All Other Criteria

We have covered several different ways to locate voice files when you know exactly what you need. But what if you don't really know what you are looking for, or you don't have any specific information at all regarding the voice file that you need?

Just for this reason, we have included a search **by all other criteria** option under Search Voice Files options in the Search pane. Searching by all other criteria will let you locate voice files based on date ranges, who dictated the voice, which transcriptionist last "touched" the voice, the worktype of the voice, or the status of the voice.



In order to search by all other criteria, simply click the **by all other criteria** under Search Voice Files options in the Search pane. A search voice files box will pop up. Enter the criteria for your search in the appropriate space on the search window and click the **Search** button. It is important to note that every search requires at least one date range which may not span more than 1 month for performance reasons.

Once you click **Search**, a new tab titled 'Voice Search Results' will be opened in your TouchType5 workspace containing any voice files which were found as a result of your search.

When searching for voice files by all other criteria there is an important phrase to remember, "sometimes, less is more or more commonly put "don't overdo it!" You do not have to fill something in for every option that appears in the search window. If you are trying to locate a voice file by date range, it may not be necessary to enter the worktype, status, priority, and MT last name. However, the more specific your search, the narrower your results and the quicker the search.

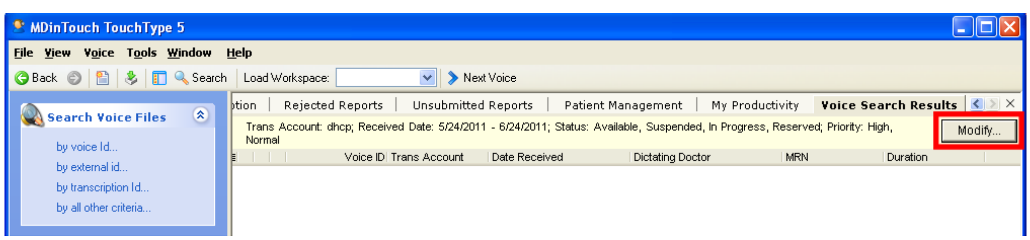
Please find below a detailed description of each of the search criteria available in search by all other criteria.

Trans Acc -	The transcription account to which the voice file belongs
MRN -	The Medical Record Number included in the dictation (not always available)
Worktype -	The dictation worktype id assigned at the time of dictation
Physician Last Name -	The last name of the Physician who dictated the voice file.
MT Lastname -	The last name of the MT who most recently performed an action on the voice file
Received Date -	The date the voice file was received by our servers
External Creation Date -	The original date the voice file was created on the phone dictation system or physician's PC
Status -	The current state of the dictation: Available - No one has the voice file suspended, reserved, or in progress

	Suspended - Someone has selected the voice file but is not currently working on it
	In Progress - Someone is currently transcribing the voice file
	Reserved - The voice file is currently in someone's reserved queue
Priority -	The priority of the dictation (high or low)
Find Only Incompleted Voice Files -	Check this Box if you want to find only incompleted voice files in your search results
Find Only Voice Files with Notes -	Check this box if you want to find only voice files with notes in your search results
Include Completed Voice Files -	Check this box if you want to include voice files which have been completed in your search results

Modifying Your Search

After you have completed a search, you may find that your search yielded no results, you may have had too many results, or you simply may have had the wrong search results. For this reason, we have included a **Modify…** button on your search results screen.



In order to modify your search, click **Modify…**, and the Search Voice Files window will popup with your previous search results already prefilled. Simply change the search criteria and click the **Search** button again to view the new results.

Changing Your Search

You may notice that you can change your search type directly from the Search Voice Files popup window. In order to change the type of search that you are performing, simply click the appropriate link in the popup window, and the search criteria will change according to your selection.

Chapter

5

Creating Reports

Understanding the basics of transcribing reports.

After learning to work with voice files, the next important lesson is learning to create reports. TouchType5 uses Microsoft Word as its word processing engine. So for the most part, if you are familiar with Word, you will have no problem typing your reports in TouchType.

TouchType goes well beyond simply helping to type a report. TouchType controls the entire workflow from initial report creation, to sending the report to the dictating physician, to electronic signature, to routing the report to referring physicians, and finally to storing and archiving the report for future access.

Creating a Report

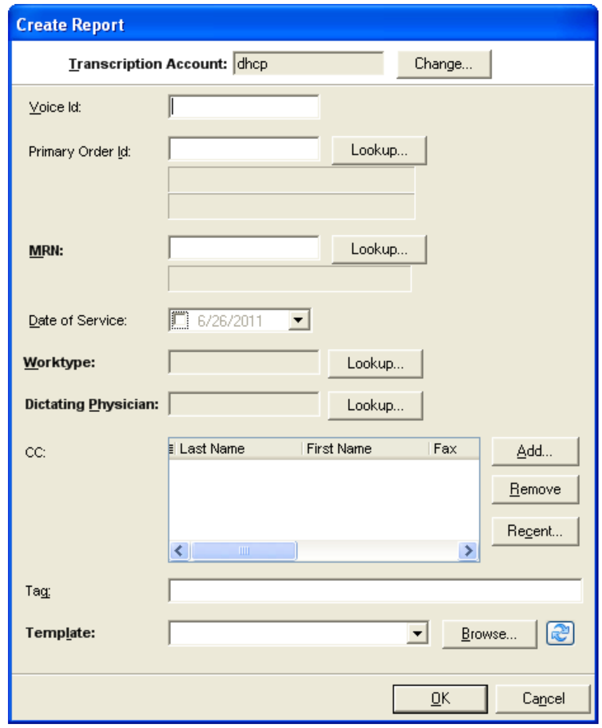
In TouchType5 you can create a report at any time, from any screen. In order to create a new report, simply click **File** and then **New Report** from the menu bar at the top of the screen or hit Ctrl-N. A select transcription account window will pop up. Select the appropriate account from the drop down box and click **OK**.

The list of account shown will be all the accounts to which your manager has given you access.

Once you have selected your transcription account a couple of things will happen. First, all of the templates for your account will automatically be downloaded to your computer (this only happens the first time you select an account). Next, the **Create Report** window will open. The create report window is where you will enter all of the information about your report.

At the top of the Create Report window, you will find a transcription account selection box prefilled with the TouchType account that you selected in the prior step. If for some reason you picked the wrong account, do not panic, you can change the account by clicking the **Change…** button.

Based on the transcription account selected, you will have several different types of data to enter for the report. TouchType uses something called *server based account settings*. Account settings are determined by your transcription manager and are stored on the server so they can automatically be accessed by TouchType at all times. They define which data items are required, hidden, or optional for each account. Because each transcription account can be configured with different server based account settings, the Create Report screen may look different depending on the transcription account that you choose.



If a data item is bold, you have to type something in that field, i.e., it is a required field. If a data item is not bold, you can type something there if you want, but it is not absolutely necessary according to the rules of TouchType. Note that your manager may have different rules for a particular account and may require that you enter some of those fields as well.

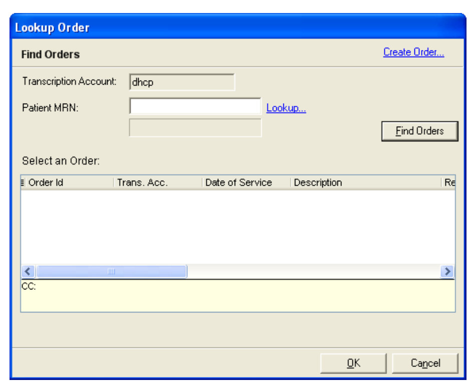
Voice Id

The first item in the create report screen is **Voice Id**. Many customers prefer entering a Voice Id because this is how you will link a voice file to a report. If you created a report directly from a voice file (which will be explained below), the Voice Id will automatically be filled in.

Primary Order Id

The second item in the create report screen is **Primary Order Id**. Orders are often used with interfaces or when the healthcare provider has office staff that enters demographic and patient visit information into the system. An order can be compared to a single patient visit or a single procedure performed on a patient.

Using orders in TouchType is very simple. The easiest way to use orders is to type the order id right into the create report screen when it is given to you. Typically thought, you have to lookup an order which is done by simply click on the **Lookup…** button to the right of the Primary Order Id input box.



After clicking this button, you will be presented with the **Lookup Order** window.

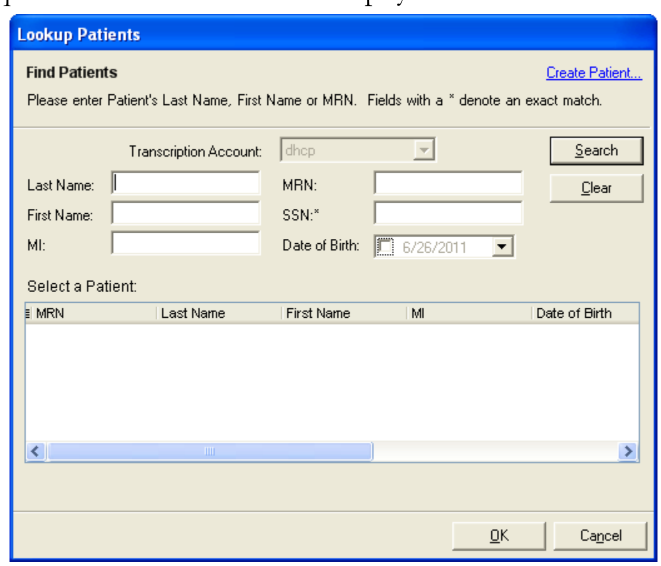
Type the patient medical record number and then click the **Find Orders** button. If you do not know the patient's medical record number click the **Lookup…** link to the right of the MRN input box. Once you click the **Find Orders** button, you will see a list of available orders for the patient. The reason we say 'available' orders, is because orders can only be used once. When an order is are associated with a report that order will no longer be shown. Pick from the list of available orders and click **OK**.

Orders
Orders have a number of different data fields. Most of these you will never use. They are reserved for interfaces to and from your healthcare provider's information system. There are however a few data items that you will use to help select an order. These items are displayed in the order selection window. Typically you would use: date of service, order description, and routing slip. For more information on Orders, please see *Editing Orders*.

MRN

For those of you who are using orders, MRN will be filled in for you. Actually, DOS will most likely also be filled in, so you can skip all the way down to Worktype.

MRN stands for Medical Record Number. Some people call it patient id, some call it chart number. Whatever you call it, MRN is a unique number that represents a patient. Every report in TouchType5 requires a MRN. Sometimes the physician will dictate the Medical Record Number, other times you may have a list of patients faxed to you on a daily basis.



If you know your patient's medical record number, simply type the number in the text box and move on. If not, click the **Lookup…** button to the right. This will pop up a **Lookup Patients** window. Enter your search criteria and then click **Search**. Select from the available patients listed in the lower window and click **OK**.

WARNING
What do I do if my patient is not found? Don't panic, just click on the *Create Patient* link at the top of the lookup window. This will jump you right into the Create Patient application component. Creating patients is covered in more detail in the chapter on Patient Management. Note that your manager will have guidelines on when you should create patients.

Date of Service

This is the date that the patient was seen at the healthcare facility. This date is not the date you are typing the report or the date the doctor dictated the voice file.

In order to select the **Date of Service**, first check the box in the Date of Service text area or tab to the field and hit the spacebar. This activates the date field. Next either type in the correct date of service, or click the down arrow in order to select the correct date from a calendar.

Prefilled Date of Service
If you are using an orders interface, the date of service will typically be filled in from your order. It is possible to change the date of service after it has pre-filled, so be careful.

Worktype

Report worktypes are a way to classify reports into categories. There is a unique list of report worktypes for each transcription account. Worktypes are created by your transcription manager. If you have any questions about which worktypes to select consult your manager.

In order to use report worktypes, simply click the **Lookup…** button next to the **Worktype** text box. Select a worktype from the list and click **OK**. If you find that you are always selecting the same worktype over and over again, you can set a default worktype through the Transcription Account Preferences component. It is also possible to set a personal list for worktypes. This will allow TouchType to simply display your personal list instead of asking the server each time you create a report for the worktypes. As you can imagine, this will be much faster but when a new worktype is added to the server it won't be available to you until you explicitly add it to your personal list. For more information on Transcription Account Preferences, please see the chapter title *Preferences*.

Dictating Physician

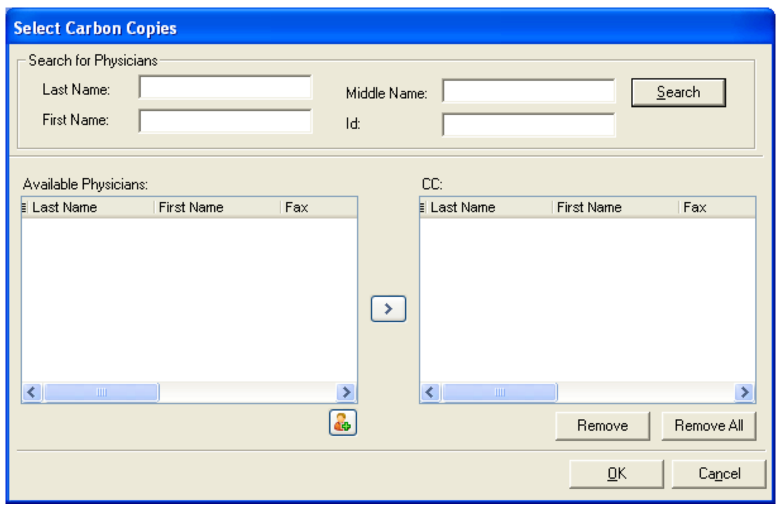
The next item in the create report screen is **Dictating Physician**. Typically, this is the physician who will be signing the report. If you have entered a Voice Id, this field will be populated automatically. Otherwise, simply click the **Lookup…** button next to the dictating physician text box. Select the correct physician and then click **OK**.

As with worktypes, it is possible to set a default dictating physician and to create a personal list, both of which are done via the Transcription Account Preferences component. For more information on Transcription Account Preferences, please see the chapter title *Preferences*.

CC

CC is a list of referring physician associated with a report. The CC list is more commonly referred to as the **Routing Slip**. Routing slips are used to 'attach' referring physicians to a report. You can add as many routing slips to a report as you would like though only four can automatically prefill onto the report ('prefilling' will be described later in this manual). Upon submission of the document as a complete document or upon electronic signature reports will be routed to the referring physician through the MDwebtop as well as via fax (if that particular account and referring is configured for faxing).

In order to add a routing slip, click the **Add…** button to the right of the routing slip window. Type in the search criteria to locate your referring physician and then click search. Highlight the physician on the right side pane and then click the arrow to move the physician over to the left side. Repeat these steps for as many routing slips as are required. If you make a mistake, you can always highlight the physician in the left pane and click **Remove**. When you are finished click the **OK** button.



A newer feature of TouchType is the **Recent…** button. This button will display all referring physicians who have been added to other reports for this same patient. This is oftentimes a much quicker way to locate the referring physicians for a particular report and patient.

Tag

The Tag field is simply a text field that can be used to capture textual information on an account by account basis, i.e., a custom field to be defined by your manager. This field is typically left blank though your manager will advise of the guidelines for this field.

Template

Templates are required for every report created in TouchType. Templates are pre-formatted Microsoft Word documents which have been designed to improve productivity and workflow. Templates can contain letterhead, 'normal text', headings, and bookmarks which will prefill data regarding your reports. For more template information than you will ever care to know, please consult the Template Building Guide available separately from MDinTouch.

The template dropdown will show all templates for the particular account chosen. These templates are "pulled" from your local machine (and will update each time you log into TouchType). If for some reason you want to use a template not associated with that account, you can click the **Browse…** button and chose a template from anywhere on your machine. Also, if you know a new template has been placed on the server but don't want to log out and back into TouchType for the templates to be refreshed, simply click the refresh button next to the Browse… button.

Report Wizard

If you have just read this entire section and are thinking, "Am I really going to have to remember this?" Well, no not really. TouchType5 uses an easy wizard which will walk you through each step you need to take during the report creation process.

If you simply press the enter key when the report creation screen first pops up, the report creation wizard will begin. The wizard will prompt you for each data item that is required in order for you to create a report. Once you have entered the last required item, TouchType5 will proceed so that you can type your report.

Screen Navigation by Keyboard Only

Most actions in TouchType can be controlled by the keyboard instead of the mouse allowing the MTs to keep their hands on the keyboard. On any screen, if you hit the Alt key, most fields and buttons will have a particular character that is underlined. This indicates the shortcut associated with that field. For example, the MRN field in the Create Report window will have the M unlined, this indicates that any time you are in this window, Alt-M will activate the MRN field.

Also note that there is a specific tab order to each screen. This means that when you have activated a particular field, hitting the tab key will cause the next appropriate field (as decided by the designers of TouchType) to be activated. For example, the Lookup… button associated with the MRN field does not have a specific shortcut key associated with it because there are four different Lookup button on that window. So, to activate the Lookup button associated with MRN, hit Alt-M, then tab to activate that button.

When a button is activated, hitting the Enter key will have the same effect as as clicking on that button.

When a checkbox is activated, hitting the spacebar will toggle the checkbox between checked and unchecked.

New in TouchType 5: Screen Navigation Enhancements
If have used TouchType in the past, note that the following shortcut keys have been added to TouchType 5.

CREATE REPORT SCREEN

- Alt-L: Template field will be selected. Hitting a letter will jump the dropdown to the first occurrence of that letter as the start of a item. This is a generic dropdown feature which can be used elsewhere.
- Alt-C: Recent
- Alt-I: Primary Order Id

EDIT REPORT SCREEN

- Tab order has been improved to be more intuitive
- Alt-M: Patient MRN. Once the field is selected, Tab then Enter will invoke the Lookup screen. This is a generic button feature that can be used elsewhere.
- Alt-1: 1. General tab
- Alt-2: 2. Order tab
- Alt-3: 3. Additional Orders tab
- Alt-4: 4. CC tab
- Alt-V: Voice Id
- Alt-W: Worktype
- Alt-P: Dictating Physician
- Alt-G: Tab
- Alt-I: Order Id
- Alt-D: Date of Service. Once the field is selected, the spacebar will toggle the checkbox between checked and unchecked. This is a generic checkbox feature which can be used elsewhere.
- Alt-C: Recent

Typing the Report

If you are familiar with Microsoft Word, then transcribing reports in TouchType will be very easy for you. If you are not familiar with MS Word then we suggest an introductory book or course on MS Word before you begin using TouchType.

All of the advanced features of Microsoft Word are available when using TouchType5. In addition, many of the medical dictionaries, word expander programs, and other Microsoft Word plugins will work without difficulty.

Aside from a general knowledge of Microsoft Word, there are a couple of other additional features of which you should be aware. The first of these are *bookmarks*. Bookmarks are special places or sections of your Microsoft Word document that are specifically formatted to pre-fill patient demographic and other information into your report. For example, patient name, patient date of birth, and dictating physician are a few of the many bookmarks available. For a complete list of bookmarks as well as how to use bookmarks when creating templates, please consult the *MDinTouch Template Building Guide*. There are two types of bookmarks which we refer to as I-beam and bracket bookmarks. If you have MS Word configured to display bookmarks, I-beam bookmarks will appear as **I** and bracket bookmarks will appear as [ ] possibly with text between the brackets. We suggest that you configure Word to display bookmarks (details below) so that you don't inadvertently remove bookmarks.

In addition to standard demographic bookmarks, there is a special type of bookmark called the *signblock*. The signblock is the signature line at the bottom of the report. The standard text which we use in the signblock is "THIS IS AN UNSIGNED REPORT." Once the report is signed by the dictating physician, this text is replaced with "THIS REPORT HAS BEEN ELECTRONICALLY SIGNED."

When typing your report, you should not delete any of the bookmarks. Specifically, you should never delete the signblock.

You can set your Microsoft Word to display bookmarks through the tools/options in Microsoft Word. In order to make bookmarks viewable in older versions:

1. Click **Tools**
2. Click **Options**
3. Click the **View** tab
4. In the *Show* section make sure to check the **Bookmark** option

In newer versions:

1. Click the multi-colored Office button in the upper left

2. Click **Word Options** (bottom right)

3. Click **Advanced**

4. Scroll down to the "Show document content" section, check the **Show bookmarks** option

The last thing which you will need to know while typing in Microsoft Word is how to *toggle*. Toggling is how you will switch back and forth between TouchType5 and Microsoft Word. This can be accomplished by using the F8 key. After you finish typing a report, in order to toggle back to TouchType5, simply press the **F8** key.

Where does my report go after I type it?

After you type your report, TouchType will save a copy of the report on your computer. You can locate the report by clicking on the **Unsubmitted Reports** section of the Navigation Tree.

At any time, you can open the report again by highlighting the report and pressing F8. You may also right click on the report and select **Edit Text**. For more information on editing reports, see the chapter titled Editing Reports.

In addition, you can delete the report by right clicking and then selecting **Delete Unsubmitted Report…**. If you choose to delete the report, it will be permanently removed from your computer. Deleting a report is an action that cannot be undone.

Aside from editing and deleting the report, you also have the option of saving and closing the document. This will save and keep a copy of the report on your computer until you are ready to submit it to our servers. To do so, right click on the document and choose **Save and Close Document**.

Submitting Reports

TouchType5 requires that all reports be submitted to the server before anything else can be done to the report.

Submitting a report takes the local copy of the report which you have just transcribed and sends to the server via TouchType5. From our servers, any of your fellow transcriptionists as well as your customers can locate the report and perform some action on it. For example, they could sign the report, they could reject the report, or they could edit the report.

There are two ways to submit reports in TouchType5: *complete* or *incomplete*.

When you submit a report **complete**, you are basically saying, "I have typed the report, and I am now ready to send it to my dictating doctor for signature."

Options for Submitting a Report

You can only submit reports from TouchType5. You cannot submit a report directly from Microsoft Word. In order to submit a report from TouchType5, make sure your report is highlighted in the TouchType5 Unsubmitted Reports folder and press **F4**. Another option is to highlight the report in the Unsubmitted Reports folder and in the menu bar, click **Report** and then **Submit As Complete**. Yet a third option is to right click on the report in the Unsubmitted Reports folder and choose **Submit As Complete**.

The other way to submit reports is *incomplete*. When you submit a report incomplete, you are saying, "Hey, something is missing or not right, and I do not have enough information to fix it." In order to submit reports incomplete, make sure your report is highlighted in TouchType5 and press the **Ctrl-F4** keys. As with submitting complete, similar other options are available for submitting a report incomplete (see above).

WARNING

An important factor for you to determine whether to submit a report complete vs. incomplete is who will need access to view the report. If you submit a report as complete, then all office staff and dictating physicians will be able to view the report. In addition, the report is ready to be signed.

If you submit a report as incomplete, then only MR managers and dictating physicians with specific access to view incomplete reports will be able to access the report. The report cannot be signed until it is changed from incomplete to complete status.

In the past submitting documents as incomplete was used as an unsophisticated way to do Quality Assurance (QA). TouchType now has much more sophisticated QA functionality so your manager may revisit the use of incomplete when moving from TT2 to TT5.

Completing your Dictations

In most cases, as you type and submit your reports, you will most likely be finished with the voice file. After submitting your reports as complete, you should complete your voice files as well. The following section will describe a streamlined workflow for creating a report directly from a voice file and submitting/completing both at once.

Improving Your Workflow

If you have read this entire manual up to this point, you have learned how to select a voice file and listen to it. You have also learned how to create a report and submit it. While it is possible in TouchType to first select a voice and then create a report, in reality you will almost always want to do both at the same time.

TouchType5 is all about improving your workflow. Assuming that the majority of your daily workflow will be based on selecting a voice and typing a report at the same time, it seems pretty silly to make you go through two different steps when we can consolidate the process into one. For this reason, we have added an additional feature which will allow you to select a voice file and create a report in one step. This feature is called *Select and Create Report.*

Creating a Report From a Voice File

If you have been paying close attention to everything that you have read, Select and Create Report may sound familiar. That is because we briefly mentioned this option in a previous chapter on how to select voice files.

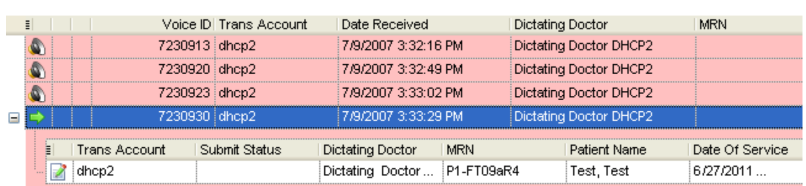
When you choose to Select and Create Report you are literally selecting the voice file, moving it into your Selected Tab and then opening the Create Report window, all with one mouse click.

One of the cool things about using Select and Create Report is that you are pre-filling the Create Report window with valuable information. Voice File Id, Dictating Doctor, and MRN (if it was input by the dictator) are all prefilled when using the Select and Create Report option. Note that most doctors do not enter an MRN when dictating. If your doctor does enter an MRN, then this field will be filled in automatically.

Another benefit of using Select and Create Report is that your voice file and report are permanently linked together. Therefore, at any time you can locate a report based on the id of the voice file or locate the voice file based on the transcription id of the report (see Searching for Reports and Searching for Voice Files for more on this topic).

Select and Create Report is simple to use. You can choose this option from any tab that contains available voice files. For example, you can Select and Create Report from the Pool, Preferred, or Reserved tabs. You can even choose this option from search results. In order to Select and Create Report, simply right click on a voice file and then click on **Select and Create Report…**.

You may notice something different when you use Select and Create Report. After you have finished typing your report and you switch back to the TouchType window (using F8), there is something dangling off of the bottom of your voice file. Well, that something is the report you just typed. Because the voice and the report are linked, TouchType will display them together on your screen. As you can see below, the current voice file indicated by the green arrow has one report associated with it, indicated by the dotted line to the report icon emerging below the green arrow.



Creating Multiple Reports from One Voice File

It is possible to create several reports from one voice file. You may need to do this if a doctor likes to dictate more than one patient per voice file.

If you need to create an additional report from a voice file, your workflow is slightly different. You obviously cannot Select and **Create Report…** because your voice file is already selected. In this case, simply right click on the voice file and click create report. TouchType will begin the report creation process, and the new report will be linked to the voice file you have in progress.

Submitting a Report and Completing the Voice File

TouchType5 also contains a *Complete and Submit Report* function.

Complete and Submit Report does exactly that; it completes your voice file and submits your report all in one step. In order to use the complete and submit function, simply right click on the voice file in your Selected tab and click on **Complete and Submit Reports**. Notice that reports is plural. The reason it says 'reports' and not 'report' is that if you choose to use this option, every report that has been created based on this voice file will be submitted as well as the voice file being completed. See the "Creating Multiple Reports from One Voice File" not above if you do not understand why you may have more than one report for your voice file.

New in TouchType 5: Patient's Previous Reports

When creating a report it is often useful to refer to an earlier report for that same patient simply for information or to copy and paste text from an older report into the report you are creating. To search for past reports on a patient quickly do the following. At any point after you have entered all information in the Create Report screen and have started transcribing the report in MS Word, switch to TouchType, right click on the report in your Unsubmitted folder and choose Patient's Previous Reports. A window will appear listing all previous reports for that patient. Click on a report to display it in the lower pane. You can highlight any text and using Ctrl-C, copy the text.

QA Workflow

Early versions of TouchType supported a very rudimentary QA workflow whereby an MT would submit a document as incomplete and a QA Editor (QAE) or manager would periodically work through the incomplete documents. The new versions of TouchType have added significant support for more sophisticated QA workflow. Some of the improvements that have been made include specific QA tabs, QA work assignment, specific QA roles and permissions so QAEs and QA managers can be assigned to specific accounts and interception of documents on an MT/dictator basis for random QA checks.

When a report is submitted to QA it goes into Review status, when it is selected for QA by a QAE, it goes into Reviewing status, if it is then assigned to the MT it will go to Reviewed status. Many MT managers have their QAEs submit the documents directly back to the customer as Complete instead of sending to the MTs in order to minimize turnaround times.

The following describes how the QA workflow affects the MT. For more information on the QA workflow and how it is configured, refer to the TouchType User Guide for Managers.

Submitting Documents to QA

An MT can decide to submit a document to QA instead of completing it from both the Transcription tab and the Unsubmitted tab. When you submit a document to QA it is considered a Request QA job. This is different than an Intercept QA where, based on various settings, the job is automatically intercepted by the system for QA based on no action from the MT.

Regardless of how a document ends up in QA, it will then be available to a QAE who has rights to the account for that document. The QAE will be able to listen to the voice file and process the QA job.

Refer to submission options to discover why you aren't able to submit jobs to QA in certain situations.

Submission Options

WARNING

It is important to note that various setting will affect which submissions options an MT has at any particular point in time.

Typically an MT will have the following options for submitting voice files: Mark Incomplete, Send to QA, Complete, Complete and Submit Reports, Send to QA and Submit to QA, and Send to QA and Submit to QA User.

Typically an MT will have the following options for submitting reports: Submit as Complete; Submit as Incomplete; Submit to QA; Submit to QA User.

The following describe the settings that limit the above submit options for an MT.

Tools, Transcription Account Settings

ALWAYS SUBMIT REPORT AS INCOMPLETE

If this checkbox is checked, it does not change submission options but a complete submission will actually become an incomplete on the server for that account. This setting is typically not used anymore and 100% interception would be used instead.

ALLOW QA SUBMISSIONS ONLY

If this checkbox is checked, on a voice file, the **Complete and Submit Reports** option will be removed and on a report, the **Submit as Complete** and **Submit as Incomplete** options will be removed for that account. This setting is typically not used anymore and 100% interception would be used instead.

Trainee

If an MT is designated as a Trainee by the MT manager, then regardless of the account, on a voice file, the **Complete and Submit Reports** option will be removed and on a report, the **Submit as Complete** and **Submit as Incomplete** options will be removed.

100% Interception

If an MT is set to 100% interception for a particular dictator, the report options **Submit as Complete** and **Submit as Incomplete** options will be removed. This will force all jobs to be intercepted. However, there are no changes to voice files submissions so it is still possible to submit a request QA job via the **Complete and Submit Reports** option.

Chapter

6

Searching for Reports

Finding a specific transcribed report by multiple criteria.

In the previous chapter, you learned everything you need to know about how to create reports. You were also briefly told what types of things someone could do to your reports once they were submitted to our servers. But what we did not tell you was how to find them once you've submitted them.

Before you can do anything with a report after it has been submitted, you will have to first locate it. Included in TouchType5 is an extensive report searching tool we call *Search Reports*. This chapter is dedicated to teaching you how to locate reports using Search Reports.

Just as with searching for voice files, the Search Reports tool can be located by clicking the Search tab at the bottom of the Navigation Tree (as you learned in at the beginning of this manual to search for voice files.

The *Search Reports* tool is located just below Search Voice Files. Because they are located closely to one another, it is important to make sure that you are using the correct component. If you are searching for voice files, you should use the Search Voice Files section. If you are searching for reports, you should use the Search Reports section.

You will find the Search Reports tool very straightforward and easy to use. Similar to the voice search, when searching for reports, you will have several different search options. The remainder of this chapter is dedicated to teaching you about the different search types and showing you the best way to locate your reports.

Searching by Transcription Id

The first type of report search available is searching by transcription id. You should search by transcription id when you know exactly what you are looking for, and have the id to prove it!

If you plan to search by transcription id, it may help to understand what a transcription id is.

Every time you submit a new report, the system creates a new transcription record in the database and assigns a transcription id. The transcription record includes everything we know about a report. All of the different versions of the report, where the report was faxed, who viewed the report, and much more are all a part of the transcription record. The transcription id is the unique identifier for the transcription record.

In order to search by transcription id, simply click the **by transcription id…** link in the Search tab. A Search Reports window will appear. Enter the transcription id in the text box and select the appropriate transcription account from the dropdown list. Then click the **Search** button. A new tab titled 'Report Search Results' will be opened in your TouchType5 workspace.

More on Transcription Records

Whenever you create a report in TouchType5, it is assigned a transcription id (trans id) and a report version id. Only the most recent version of a report is available through TouchType, so once you make a change to a report, you will not be able to access previous versions. This is not to say that the report is immediately deleted. We do store older versions of reports for some period of time. If you need to access a previous version of a report simply contact the Customer Service Group (CSG) by emailing help@mdintouch.com and provide the version id of your report that is needed.

Searching by Voice Id

Because reports and voice files can be associated in TouchType5, it is possible to locate a report based on a voice file id. If you do not remember how to associate voice files to a report please go back and read up on creating reports and improving your workflow.

Locating a report based on a voice file can be extraordinarily useful in many situations.

In order to search by voice id, simply click the **by voice id…** link in the Search tab. A Search Reports window will appear. Enter the voice id in the text box and click the **Search** button. A new tab titled 'Report Search Results' will be opened in your TouchType5 workspace.

Searching by Patient

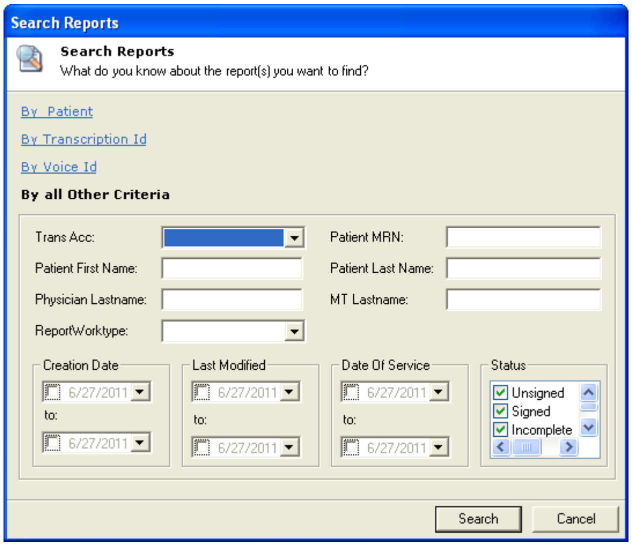
The most common type of search for reports which you will perform will be searching by patient. You will use this search when you want to pull up all of the reports for a particular patient.

In order to search reports by patient, simply click the **by patient…** link in the Search Tab. A Search Reports window will appear. Enter the search criteria in the text boxes provided and click the **Search** button. A select patient window will appear. Select one or more patients from the list and then click **OK**. A new tab titled 'Report Search

Results' will be opened in your TouchType5 workspace containing all the reports for the selected patients.

Searching by All Other Criteria

If you want to locate reports based on any other criteria such as date range, dictating physician, etc., use the search by all other criteria… option.



In order to search by all other criteria, simply click the **by all other criteria…** link in the Search Tab. A Search Reports window will appear. Enter the criteria for your search in the appropriate space on the search window and click the **Search** button. It is important to note that every search requires at least one date range spanning no more than 1 month.

Once you click search, a new tab titled 'Report Search Results' will be opened in your TouchType5 workspace containing any reports which were found as a result of your search.

Remember, just as with the voice search, when searching for reports by all other criteria, less is more. You do not have to fill something in for every option that appears in the search window. However, the more specific your search, the narrower your results and the quicker the search.

Please find below a detailed description of each of the search criteria available in search by all other criteria.

Trans Acc -	The transcription account associated with the report
Patient MRN -	The Medical Record Number assigned during report creation
Patient First Name -	The first name of the patient associated with the report
Patient Last Name -	The last name of the patient associated with the report

Physician Last Name -	The last name of the physician who dictated the report
MT Lastname -	The last name of the MT who submitted the most recent version of the report
Creation Date -	The date the first version of the report was submitted
Last Modified -	The date when the report was last modified, including creation, edit, and signature
Date of Service -	The date of service assigned to a report at the time the report was created
Status -	The current state of the report: Unsigned - The report is in a complete state waiting for signature Signed - The report has been signed by the dictating physician Incomplete - The report has been submitted in an incomplete state and needs to be edited or completed Rejected - The report has been rejected by the dictating physician and needs to be edited and resubmitted

Modifying Your Search

After you have completed a search, you may find that your search yielded no results, you may have had too many results, or you simply may have had the wrong search results. For this reason, we have included a **Modify…** button on your search results screen.

In order to modify your search, click **Modify…**, and the Search Voice Files window will popup with your previous search results already prefilled. Simply change the search criteria and click the **Search** button again to view the new results.

Changing Your Search
You may notice that you can change your search type directly from the Search Reports popup window. In order to change the type of search that you are performing, simply click the appropriate link in the popup window, and the search criteria will change according to your selection.

Report Preview

Assuming that you have successfully completed a report search and are satisfied with the results, the next step would be to view the report. TouchType5 provides a report preview function which accomplishes just this.

In order to preview a report, simply right click on the report in your search results grid, and then click **Preview**. A preview report window will appear containing the text from your report. After viewing the report, you can close the report's preview window by clicking the **Close** button. There are a couple of additional actions that you can perform from the preview window such as *editing properties* and *editing text* for a report. Those actions will be covered later.

Suppose that your Report Search has returned two or more results and you would like to preview all of the results. It is not necessary to right click on each report and preview it. You can preview multiple reports at once.

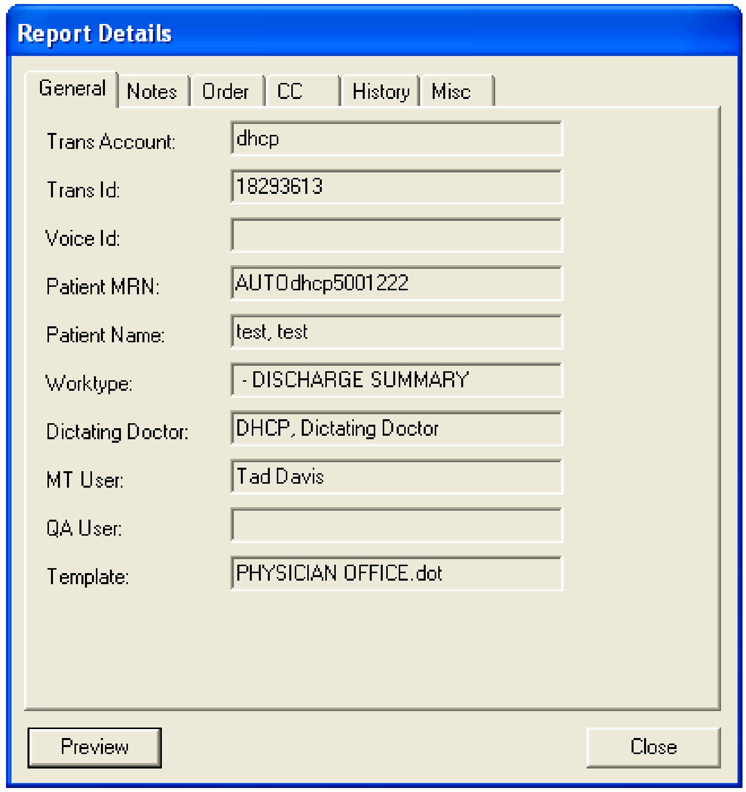
In order to preview multiple reports, highlight all of the reports you wish to preview. Then right click and select **Preview**.

You will notice that the right and left arrow buttons will now be active. Click on the buttons to navigate through the reports you have selected to preview. The bottom of the preview window will note how many reports you have selected to preview, and which one is currently being displayed. Once you have finished previewing the reports, click the **Close** button at the bottom of the screen.

Report Details

In addition to previewing a report from your search results, you also have the ability to view the report details. The report details contain any information that you would possibly need to know about a report. The report details screen is composed of six tabs: General, Order, Routing Slip, Notes, History and Misc.

The **General** tab contains the most general information about a report. The first field in the General tab is Trans Account. This is the transcription account in which the report was typed. The second field is Trans Id. The Trans Id is the unique identifier for a transcribed report. The third field is Voice Id which indicates if a voice file is associated with the report. The next two fields are Patient MRN and Patient Name which indicate the patient to whom the report belongs. Next is the Worktype field which indicates the report worktype which was selected during report creation. Following this, is the Dictating Doctor field indicating who the dictating physician was for the report. The next to fields are MT User and QA User which are the first MT and QA User associated with the transcription record. The final field on the General tab is the Template field which indicates which template was selected at the time of report creation.



The **Order** tab is the second tab on the Report Details screen. This tab contains all of the order information available for the report. Because there are so many order fields, and most likely all of the data for orders will be populated by an interface, we will not get into each specific field. For more information on the fields available with orders, please consult the "MDinTouch Interface Guide."

The next tab on the Report Details screen is the **CC** or Routing Slip tab. Routing slips were discussed in an earlier chapter, but just in case you forgot, routing slips are used to associate referring physicians to reports.

The next tab is **Notes**. The Notes tab contains any notes regarding the report you have selected. At any time, you can add notes to a report by typing in the Add Note text box and then clicking **Add**. The date and time of your note (along with your name) are automatically attached to your note. There is an entire section dedicated to Notes in the "TouchType 5 User Guide for Managers."

The final tab on the Report Details screen is the **History** tab. This tab is broken down into two sections: the Audit History and the Fax History.

Audit History shows everything that has happened to a report from the time it was created. If anyone edits, signs, views, or faxes a report it is all logged in the Audit History. The Audit History displays the date, the report version id, the type of event, and who performed the event on the report.

Fax History shows the complete faxing records for the report including the date and time of the fax, where the report was faxed, to whom it was faxed, and the resulting transmission status (i.e., whether the report was successfully sent).

In addition to viewing the details on a report, you also have the ability to jump right into report preview from the Report Details screen.

The **Misc** tab contains information than can be used by the Customer Support Group to debug problems and can be ignored.

Chapter

7

Editing Reports

Making changes to a transcribed report after it has been submitted.

This chapter will educate you on how TouchType5 handles report editing. There are two types of editing that can be performed on TouchType5: Editing Text and Editing Properties.

Editing a Report's Text

Editing a report's text simply means that you are making a correction to the contents of your document. Maybe the doctor said left instead of right, maybe you spelled a medication or diagnosis incorrectly. In these situations, you may choose to edit a report's text.

You can edit the text from any report screen in the system. In order to edit a report's text, simply right click on the report and click on **Edit Text**. A Microsoft Word document will appear containing your report. Make any changes necessary and then return to TouchType and submit your report in the same way you do when creating reports.

It is important to understand two things about editing report text. First, after you choose **Edit Text** from the right click context menu, TouchType will automatically change the focus in your workspace to the Unsubmitted Reports tab. This is done so that when you switch back to TouchType, you will be ready to submit your changes.

Second, none of your changes to the report will be recorded until the report is submitted to our servers. Therefore, if you pull up a report for editing by mistake or if you make changes to a report and realize that you have made errors beyond repair, it is absolutely safe to delete the local version of the report. When the local version of the report is deleted from the Unsubmitted Reports tab, it will be just like nothing ever happened.

Editing a Report's Properties

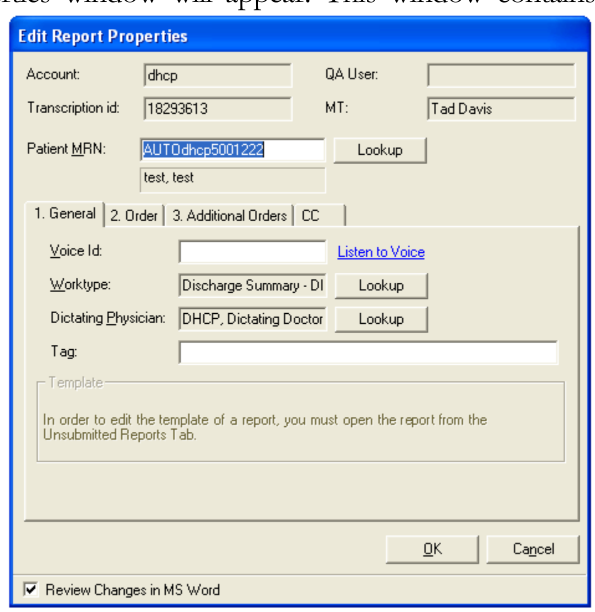
The second type of report editing is editing a report's properties. Any time that you have to change something more than just the simple text of a report, you should choose to edit report properties.

At the time you create a report, you enter valuable information for the report which will help you or your customers locate reports. Collectively, we group all of this data under the category of Report Properties. Items such as patient MRN, dictating physician, and routing slips are some of the information included in a report's properties. For example, if you notice that a patient's name is spelled incorrectly on a report or the 'CC: line' at the bottom of a report is incorrect, this is most likely a result of a report's properties being incorrect.

Whenever faced with a situation like this, it is mandatory to fix the report properties rather than simply fix the text in the report. Imagine that a patient's name is spelled incorrectly on a report. Let's say that you edit the report's text, but you do not edit the properties associated to the report. What do you think will happen the next time someone tries to locate the report searching by patient name? Right, they are not going to be able to find it because the patient's name is spelled incorrectly in the database.

Even worse, imagine that someone creates a new report based on that same patient. Well, the new report is going to also have the incorrect spelling.

In order to edit a report's properties, simply right click on a report, and choose **Edit Properties**. An Edit Report Properties window will appear. This window contains global information on your report as well as general information, order information, and routing slip Information. Modify the incorrect data and Click **OK**.



As with the Create Report screen, there are many fields on this screen and most can be activated directly using the Alt key. In addition, each tab can be activated using Alt-1, Alt-2, Alt-3 and Alt-4 even though holding the Alt key down will not underline the number due to Microsoft Windows restrictions on tab titles.

You may notice that one of the data items that you have the ability to edit is the template. <u>It is important to note that if you choose to change the template of a report, you will lose any text that you have transcribed in the previous version of the document.</u> It is very rare that you would choose to edit a template for a report.

However, if you do need to change the template, make sure that you have copied the text from the previous version of the report.

It is also important to note the **Review Changes in MS Word** checkbox at the very bottom of the Edit Report Properties window. If you choose to leave this checkbox enabled, every time you finish editing a report's properties, TouchType will open your report so that you can edit the text. When the report is opened, all of the bookmarks in the report will be updated to reflect the new report properties. Therefore, if you chose to edit the patient's name in the report properties, the patient name will be updated in the text of the report when the report is opened for editing.

Editing Order Information on a Report

Although we have warned you that order information usually comes from interfaces and should normally be left untouched, you may be faced with a situation where you must edit order information on a report.

You can edit the order information directly from the **Order** tab on the Edit Report Properties screen. From the Order tab, you can either choose to pick a different order for a report, or actually edit the existing order associated to a report. In both cases, once you make any changes to the order, the changes will be reflected in the report's properties.

Adding Multiple Orders to a Report

In rare cases, you may want to associate multiple orders to a single transcribed report. To do this you can click the **Additional Orders** tab. Note that if there is a number in parenthesis next to the Additional Orders label, that number indicates the number of additional orders attached to the report.

To add an additional order, click the **Lookup…** button just as you do on the Create Report screen when adding the original order. To remove an additional order, highlight the order and click the **Remove** button.

Editing the Routing Slip

After a report has been created, the routing slip can be edited by clicking the **CC** tab. This tab functions in the same manner as the CC portion of the Create Report screen. Note: If you have chosen a new order on your report, make sure you verify that the correct CC information is still contained in the CC tab. Sometimes orders have associated CC information with them or lack of CC information (which will delete out any existing CCs listed on the report).

Rejected Reports

WARNING

When reports are submitted into TouchType5, they are made available to your dictating physicians. In, hopefully, very rare cases your physicians are going to find something wrong with your report. In these situations they may choose to reject the report.

The Navigation Tree in TouchType5 has a special section for Rejected Reports. In order to see your rejected reports, simply click on the **Rejected Reports** section, and a tab will open in your MT workspace.

Whenever a report has been rejected, the system requires that the rejecting physician types a note indicating why they have rejected the report. For this reason, the first thing that you may want to do when 'working' your reject list is to view the notes tab in the report details for your report. Right from the notes tab you can preview the report, and then choose to edit the reports properties or text. If you cannot remember how to do this, refer to the previous chapter.

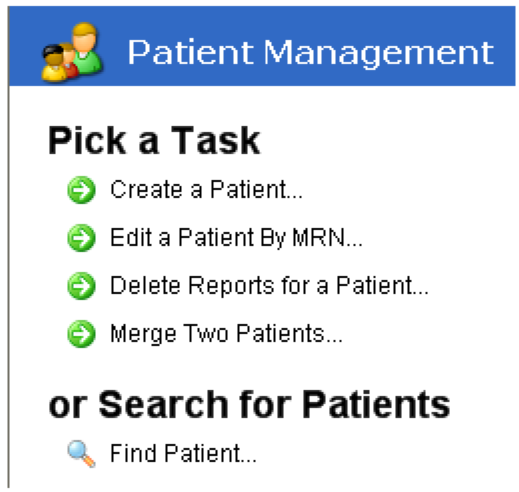
Once you have edited the rejected report and submitted it into the system, the new version of the report will replace the rejected version and become available for signature by the dictating physician.

Chapter 8

Patient Management

Making changes to a transcribed report after it has been submitted.

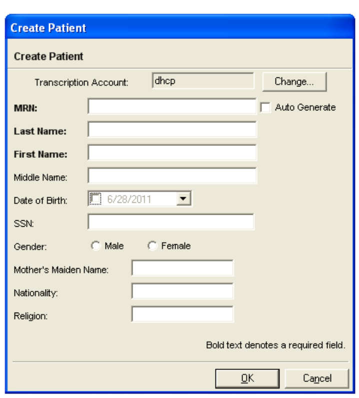
TouchType5 is designed around the concept of streamlining the workflow of transcribing reports. However, it is important to remember that everything begins and ends with the patient. Because of this, TouchType5 contains a complete **Patient Management** application component. This component can be found at the bottom of the Navigation Tree. Patient Management will allow you to create patients, edit patients, merge patients, and delete reports from patient records.



Creating a Patient

The first task available in Patient Management is Create a Patient... Although you can create patients directly through the Create Report window, there may be some situations where you need to create a patient without creating a report. In these situations, you should use the create patient functionality in Patient Management.

In order to create a patient simply click the **Create a Patient…** link on the Patient Management tab. The first thing that you will have to do is select the transcription account in which you wish to create the patient. After you select the account, a Create Patient window will appear.



Just as with creating reports, the Create Patient window is specifically customized according to your Transcription Account Settings. For more information on account settings, please refer to the chapter on creating reports.

Below is a complete list of the data fields available when creating patients. Depending on your account settings, you may not see all of these fields. If any of the fields are missing, don't worry. Fill in all the relevant fields and then click **OK** (required fields are noted by a bold labels).

Editing a Patient

At any time, you have the ability to edit the patient. In order to edit the patient, simply click on the **Edit a Patient by MRN…** link on the Patient Management tab.

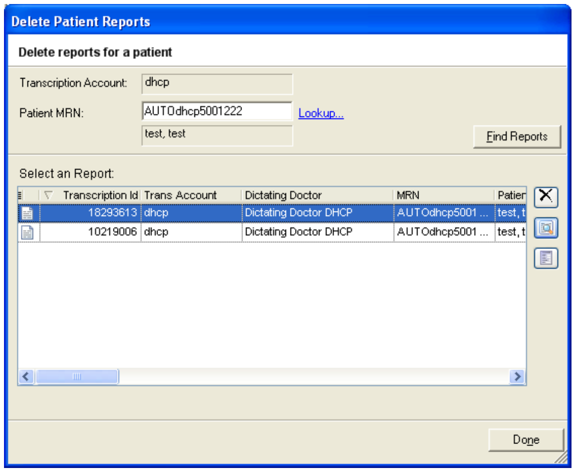
When you click on the link, you will be prompted to select a transcription account, and enter the patient's medical record number. If you do not know the medical record number, you can always click the **lookup…** link to search for the correct patient. After you have entered the transcription account and MRN, click the **OK** button. An Edit Patient window will appear. Edit any of the demographic data that needs to be corrected and then click the **OK** button at the bottom of the screen.

Deleting Reports for a Patient

In certain circumstances, you may be required to delete reports from TouchType5. Once a report is deleted you can never retrieve it. In addition, once a report is deleted, the lines for that report are not included in your accounting results. For these reasons, it is very important to be sure you want to delete patient reports before taking action.

If you understand the ramifications and still wish to delete reports, you can use the **Delete Reports for a Patient** link in Patient Management. In order to delete reports, simply click the **Delete Reports for a Patient…** link.

After clicking this link, a find patient box will appear. Enter the transcription account and the MRN of the patient for whom you wish to delete reports and click the **OK** button. The Delete Patient Reports window will appear and you will be presented with a list of all the reports which belong to the patient. You can preview any of the reports by clicking the **Preview Report**  icon to the right of the screen. You can also see the report details of any report by clicking the **Report Details**  icon. Highlight the report you wish to delete and click the **Delete Report**  icon to the right of the screen. The system will require that you confirm that you wish to delete the report.

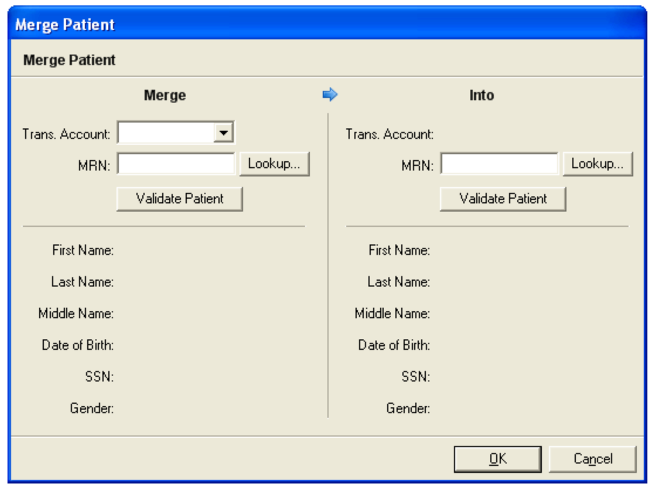


Because deleting reports has such permanent consequences, TouchType will not allow you to delete more than one report at a time.

When you are finished deleting reports, click the **Done** button at the bottom of the screen.

Merging Two Patients

Sometimes it is necessary to merge two patient records into one because they both actually represent the same patient. This is most important after reports have been transcribed for each patient because searching for reports for a patient becomes very difficult if you can't see all the reports listed at once, i.e., when they are split across multiple patients.



In order to merge two patient records, click the **Merge Two Patients…** link. The Merge Patient window will appear and you will be able to choose a **Merge** patient and an **Into** patient. First either enter the MRN or Lookup the Merge patient and click **Validate Patient** to fill in the demographics below. Verify this is indeed the correct patient. Next, either enter the MRN or Lookup the Into patient and click **Validate Patient** to fill in the demographics below. Again, verify this is the correct patient. Then click **OK**. All of the reports under the Merge patient id will be moved to the Into patient id and the Merge patient record will then be deleted from the system. <u>There is no undo for this action so be very careful when merging patients!</u>

Searching for Patients

To search for a patient click the **Find Patient…** link on the *Patient Management* tab. A patient search window will pop up. Enter any relevant search criteria and click the **OK** button. A new Patient Search Results tab will open up in your workspace.

You can right click on any of the search results in order to edit, or find reports for that particular patient.

Chapter 9

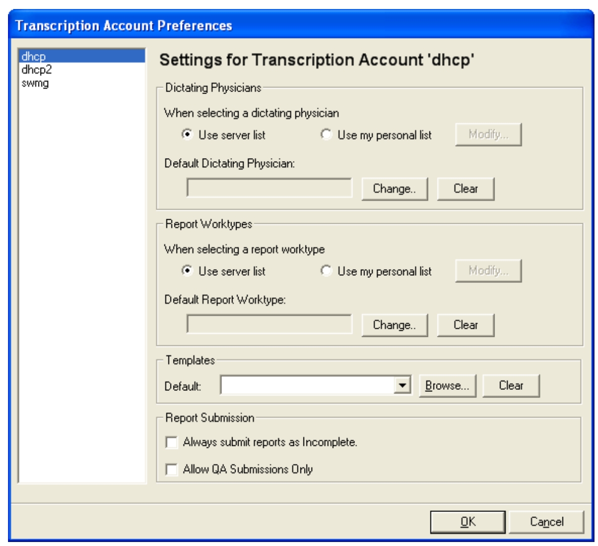
Preferences

Configuring TouchType 5 for your needs.

TouchType5 can be customized to meet your needs. All of the potential customization options for your particular installation can be found in one of two places: Transcription Account Preferences and Options.

Transcription Account Preferences

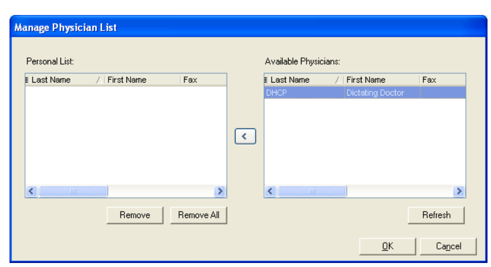
Transcription Account Preferences can be located through the **Tools** menu at the top of the TouchType application. If you work on multiple transcription accounts, you can set different preferences for each account.



In order to set your preferences, simply highlight the account on the left of the preferences window. Then set the preferences for that account on the right side of the window. The following preferences are available for each account.

Dictating Physicians

As mentioned in the Create Report section of this document, you can create a personal list of dictating physicians. You can choose to either use a server list, or a personal list. The server list will include every possible dictating physician for your healthcare organization. A personal list can be customized by you to include only the specific physicians that you transcribe.



In most cases, you will always want to use the server list, however, there may be a situation where there are so many physicians listed that you may want to narrow down the list a bit. In order to use a personal list, select the **Use my personal list** option and then click the **Modify** button. A Manage Physician List window will appear. Highlight any physicians you would like to include and then click the arrow to move them over to your personal list. When you are finished, click the **OK** button. If at any time you wish to remove a physician from your personal list, highlight the physician's name in the Personal List (left side) and click **Remove**.

In addition, you can select a default dictating physician which will prefill any time you are creating a new report. If you would like to select a default dictating physician, simply click the **Change** button, select your physician from the list and click **OK**.

WARNING

It is important to remember that if you are using a Personal List, if a new dictator is added to the server you will not see that dictator. You must explicitly return to this screen and add that new dictator to your Personal List. Do not be one of those users who call support saying TouchType is broken and not showing all the dictating physicians.

Report Worktypes

Just as with physicians, you can choose to use a personal list of Report Worktypes rather than the server list. In order to use a personal list, select the **Use my personal list** option and then click the **Modify** button. A Manage Personal Worktypes window will appear. Highlight any worktypes you would like to include and then click the arrow to move them over to your personal list. When you are finished, click the **OK** button. If at any time you wish to remove a worktype from your personal list, highlight the worktype in the Personal List (left side) and click **Remove**.

In addition, you can select a default worktype which will prefill any time you are creating a new report. If you would like to select a default worktype, simply click the **Change** button, select your worktype from the list and click **OK**.

WARNING

Again, it is important to remember that if you are using a Personal List, if a new report worktype is added to the server you will not see that worktype. You must explicitly return to this screen and add that new worktype to your Personal List. Do not be one of those users who call support saying TouchType is broken and not showing all the worktypes.

Templates

It is also possible to select a default template per account. In order to select a default template, simply click the **Browse** button, locate the template you wish to use as your default, and then click **Open**.

Report Submission

At the bottom of the Transcription Account Preferences screen, you will find preferences for Report Submission. These preferences are usually reserved for trainees.

If you choose to enable the checkbox, **Always submit reports as Incomplete**, then every report that you submit will be marked as incomplete (even if you choose submit complete).

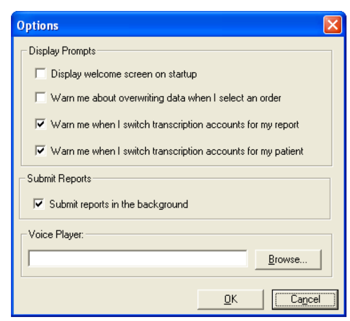
Note that a new role, transcriptionist trainee has been added to the system that allows the MT manager to essentially do the same thing as this feature therefore this feature is now rarely used as it requires the MT to take the action instead of leaving that determination up to the manager as the new feature does. Therefore we suggest that you do not use this feature.

If you choose to enable the checkbox, **Allow QA Submissions Only**, then you will only be able to submit reports via the Transcription tab and will only have submit to QA options.

Note that a new feature, interception, has been added to the system that allows the MT manager to essentially do the same thing as this feature therefore this feature is now rarely used as it requires the MT to take the action instead of leaving that determination up to the manager as the new feature does. Therefore we suggest that you do not use this feature.

Once you have made any necessary changes in your Transcription Account Preferences, it is necessary to click the **OK** button in order to save your changes.

Options



TouchType Options can also be located through the Tools menu item at the top of the TouchType application. Options are not specific to any particular TouchType account. The options are global settings which will apply to any account in which you are transcribing.

A description of the 5 options available in TouchType5 are listed below.

Display Welcome Screen on Startup	If this option is enabled, then every time TouchType loads, the welcome screen will appear.
Warn me about overwriting data when I select an order	If this option is enabled, then every time you select an order during report creation, the system will warn you

	about overwriting data.
Warn me when I switch transcription accounts for my report	If this option is enabled, then every time you switch transcription accounts for your report, the system will warn you about losing your changes.
Warn me when I switch transcription accounts for my patient	If this option is enabled, then every time you switch transcription accounts for your patient, the system will warn you about losing your changes
Voice Player	This option is where you set you default voice player which TouchType will use when playing voice files. In order to select a player, click the **Browse** button, navigate to the program you wish to use and click **Open**.

WARNING

The Voice Player option is particularly important as without a Voice Player set you will always receive the following error in TouchType whenever you try to play a voice file:

You have not selected a voice player to use when playing voice file.

Chapter A

Appendices

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
	Primary Order ID	Alt+I
	MRN	Alt+M
	Date Of Service	Alt+D
	Worktype	Alt+W
	Dictating Physician	Alt+P
	Routing Slip - Add	Alt+A
	Routing Slip - Remove	Alt+R
	Routing Slip - Recent	Alt+C
	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 TouchType5	F8
Edit Report Properties	MRN	Alt+M
	1. General	Alt+1
	Voice ID	Alt+V
	Worktype	Alt+W
	Dictating Physician	Alt+P
	Tag	Alt+G
	2. Order	Alt+2
	Primary Order ID	Alt+I
	Date Of Service	Alt+D
	3. Additional Orders	Alt+3
	Additional Orders - Lookup	Alt+L
	Additional Orders - Remove	Alt+R
	4. CC	Alt+4
	Routing Slip - Add	Alt+A
	Routing Slip - Remove	Alt+R
	Routing Slip - Recent	Alt+C
	OK	Alt+O
	Cancel	Alt+N

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 (i.e., 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 (i.e., 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 TouchType5.

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.

Date Of Service: 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 (i.e., 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. (i.e., 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 (i.e., 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.

Date of Service: 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.