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User Guide

WEB DELIVERY

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TRANSDYNE

Web Delivery User Guide

About This Document

This manual is intended for administrators and users of the Wed Delivery System that want more detailed information about using Wed Delivery System.

Copyright Notice and Usage Terms

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Table of Contents

Accessing Web Delivery System

System Requirements:

Computer/Processor:	Computer with a 486/66-MHz processor or higher (Pentium processor recommended)
Operating System:	Windows 2000, or Windows XP or Windows Vista
Microsoft Word:	Microsoft Word 97 sp1 or higher
Browser:	Internet Explorer 6 Sp1 or higher

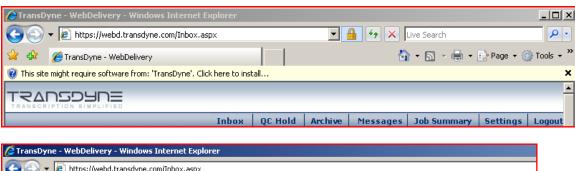## Initial Setup – Installing the required software

The WebDelivery system requires two ActiveX controls to be installed; viz. TD Job Handler and TD Job Editor. If you are logged in and have Administrator rights to your computer, these ActiveX controls will be installed automatically when you access the Web Delivery system for the first time, or when a newer version of the ActiveX is required by the Web Delivery System.

Note: A system administrator may also allow other types of users to install and update these ActiveX controls. If you have a problem installing these ActiveX controls, please see you system administrator.

1. Start the Web browser and enter https://webd.transdyne.com and login using the user id and password provided by your account representative.

2. A dialog bar at the top of the browser will say that this website wants to install software from TransDyne. Click this bar to bring up a menu that asks if you want to Install ActiveX Control. Select Install ActiveX Control to continue.

3. (Windows Vista, Windows 2008 Server) A User Account popup will ask you want to install software from TransDyne. Click Continue

4. A Security Warning dialog will appear. Click Install to proceed with the installation

The Concept:

The Web Delivery System is developed based on the typical activity that takes place at most of our client sites. The most important activities that are performed at most of our clients are:

1. Access the transcribed reports of the day and file them in the patient medical records either physically by printing them or electronically by downloading them.

2. Make changes such as patient demographics or the report content.

3. Electronically sign reports.

4. Search transcribed reports.

5. Track reports currently being transcribed.

The above tasks are easily performed using these features.

INBOX: Inbox is where you would find reports that are not printed or downloaded. Once a report is printed or downloaded, it is taken off from the inbox. A user can choose to review and/or approve a report and print and/or download one or more reports. Users can also E-Sign and/or View history of the report from this page.

QCHOLD: Occasionally, our medical transcriptionists might have to leave a few blanks in a report. This could be because of non-receipt of patient names, bad audio or other reasons because of which we cannot decipher whatever was dictated. In such cases, our Quality Control staff would flag the report s so that the Web Delivery users can review such reports, make necessary changes or additions, and then release the report for normal processing.

ARCHIVE: Users can search for a report based on different criteria like Date of Service, Date of Dictation, MRN #, Patient Name, Provider Name, Report Type or Job Status or a combination of any of these criteria.
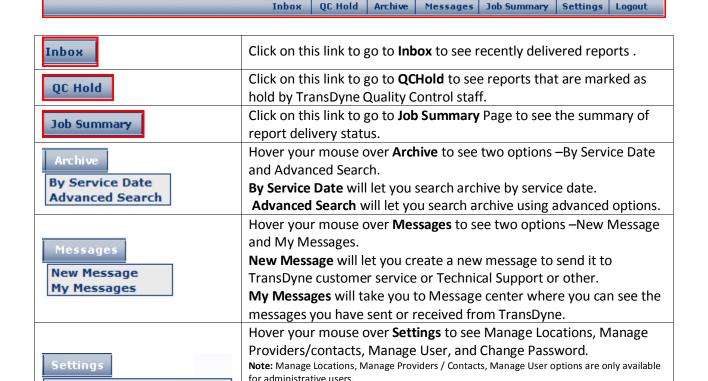
Navigation Bar

Navigation bar is the key component of the WebDelivery which is displayed across all pages and will help you navigate between different pages of the system. This Navigation bar is a list of buttons provided to you; viz. Inbox, QCHold, Job Summary, Archive, Messages, Settings and Logout. When you click on any of these options, you will be either provided with more buttons or taken to the corresponding pages.

Inbox	Click on this link to go to **Inbox** to see recently delivered reports .
QC Hold	Click on this link to go to **QCHold** to see reports that are marked as hold by TransDyne Quality Control staff.
Job Summary	Click on this link to go to **Job Summary** Page to see the summary of report delivery status.
Archive — By Service Date, Advanced Search	Hover your mouse over **Archive** to see two options –By Service Date and Advanced Search. **By Service Date** will let you search archive by service date. **Advanced Search** will let you search archive using advanced options.
Messages — New Message, My Messages	Hover your mouse over **Messages** to see two options –New Message and My Messages. **New Message** will let you create a new message to send it to TransDyne customer service or Technical Support or other. **My Messages** will take you to Message center where you can see the messages you have sent or received from TransDyne.
Settings — Manage Locations, Manage Providers/Contacts, Manage User, Change Password	Hover your mouse over **Settings** to see Manage Locations, Manage Providers/contacts, Manage User, and Change Password. Note: Manage Locations, Manage Providers / Contacts, Manage User options are only available for administrative users. **Manage Locations** will let you add/modify locations. **Manage Providers / Contacts** will let you add/modify providers or administrative contacts. **Manage User** will let you add/modify users. **Change password** will let you change password.
Logout	**Logout** will let you log you log out of Web Delivery system.

Inbox

Inbox is the home page of the Web Delivery system and you will be defaulted to this page after successful login. Inbox works just like any other email client you have used before and displays reports that were recently delivered. Reports will be taken off this page as soon as they are printed or downloaded.

Inbox features:

1. Download reports to your local or network folder.

2. Print one or more reports to a local or network printer.

3. Download and Print.

4. Review /approve unapproved reports.

5. Preview approved reports.

6. View history of a report.

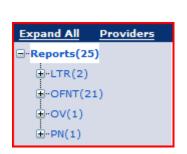7. Filter reports based on provider or report type or approved/unapproved status.

This page mainly consists of two panes viz. Navigation tree and Reports Grid.

Navigation tree: The default tree view displays all providers that have reports available for download and/or print along with the number of reports available for each provider. This tree can be further drilled down to display different report types available for each provider by clicking on a specific provider or by clicking on *Expand All.* You can also collapse the tree by clicking on the *Collapse All.*

Clicking on the **_Report Type_** link will change the Tree to display all report types available for download along with the number of reports available and this can be further drilled down to display different providers that have reports of this report type or by clicking on **_Expand All._** You can also collapse the tree by clicking on the **_Collapse All_**

Navigation tree can be changed back and forth between Providers Tree and Report Types tree by clicking on the **_Providers_** link **_or Report Type_** link respectively.

Reports Grid: This grid will list all reports based on the criteria selected in the left hand side navigation tree. The default grid view displays all reports available for download and/or print.

Download Click on this link to Download one or more reports.

Print Click on this link to Print one or more reports

Print & Download Click on this link to Print and Download one or more reports

Click on this icon to review/approve (eSign) the report.

Click on this icon to print the report.

Click on this icon to view history of the report.

You can also sort reports ascending or descending by clicking on the column header. The default sorting is done by Date of Dictation. The check boxes to the left are provided to select multiple reports for printing and/or downloading one or more reports.

Color Legend: Reports are displayed in different colors based on their status.

Blue: Reports that are recently delivered will be displayed in Blue
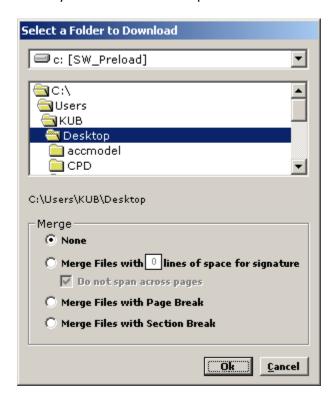
Orange: Reports that are on QC Hold will be displayed in orange.

Green: Reports that are previously approved will be displayed in green.

Black: Reports that have been printed or downloaded will be displayed in Black.

Download report(s):

To download one or more reports, click on the check boxes to select the report from the reports grid. Alternatively you can select all reports by clicking on the very first check box that is found to the left of the column header 'Date of Dictation'. Once you have selected the reports, click on ***Download.*** Select the folder that you would like these reports to be downloaded to and click OK.

Note: You cannot create new folders from this screen. You will have to create folders using your operating system provided tools

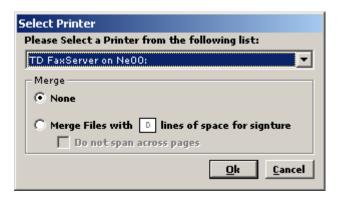## Using the merge feature while downloading:

None: This option will download report as a separate file for each report.

Merge files with lines of space for signature: This option will merge reports in to a single file but leaves few lines of space for signature. The Do not span across pages option will make sure a single report doesn't span across multiple pages. This option is particularly useful when printing reports on to a sticky paper.

Merge Files with Page Break: This option will merge reports in to a single file with a page break in between reports.

Merge Files with Section Break: This option will merge reports in to a single file with a section break in between reports.

Printing Report(s): To print one or more reports, click on the check boxes to select the report from the reports grid. Alternatively you can select all reports by clicking on the very first check box that is found to the left of the column header 'Date of Dictation'. Once you have selected the reports, click on 🖹*Print.* Select the printer that you would like these reports to be printed to and click OK.
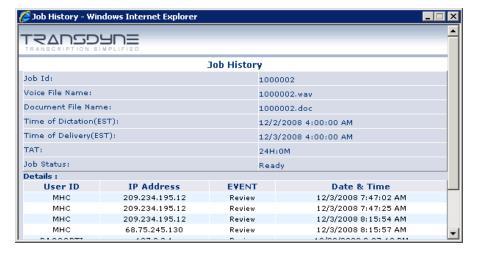

Using the merge feature while downloading:

None: This option will not merge reports before printing, choose this option if you would like to disable merging.

Merge files with lines of space for signature: This option will merge reports in to a single file but leaves few lines of space for signature. The Do not span across pages option will make sure a single report doesn't span across multiple pages. This option is particularly useful when printing reports on to a sticky paper.
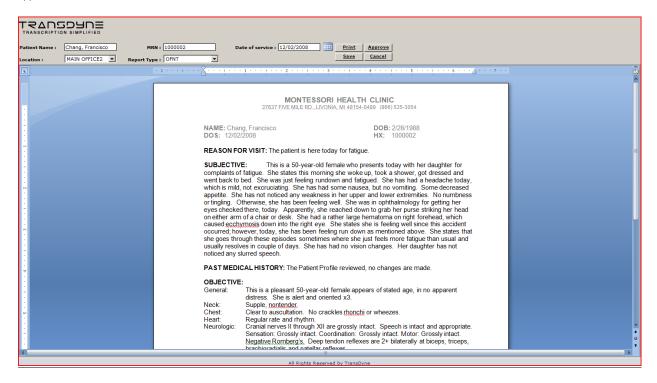
Download and Print: This convenience feature will download reports to a selected folder and then prints them to the selected printer. This works exactly as if you clicked on download and print separately. Please refer to downloading sections for option while downloading and printing section for options while printing.

View History: This feature will allow you to see more detailed information and also history of what happened to this report such as when and who reviewed, previewed, printed or downloaded.

Review / Approve: This feature will allow you to make changes to the content and/or the demographic information and approve the report. To review a report click on the word icon 📄 that is available to the right of each report. Once you click on the word icon, you will see a new window with the report as shown below.

Note: This feature requires that you have Microsoft Word installed on your computer. The word icon may not appear if the report is already approved.

Save Clicking on the save button will save your changes and take you back to the Inbox. You can visit this page later to make additional changes.

Approve Clicking on the approve button will save your changes and also protects it from making further changes later.

Print Click on the print button to print the report.

Cancel Click on the cancel button to cancel changes and take you back to Inbox. You can visit this page later to make additional changes by clicking on the word icon from the reports grid.

e-Sign: e-Sign is a feature that is only enabled on request. Either the TransDyne customer service or your office manager/administrator can enable this feature for you. If you have the e-Sign feature enabled, then the system will insert a signature line at the bottom of the report and prevents further changes.

You will have to sign the reports by clicking on the approve button **Approve**.

QCHold

QCHold will display reports that are marked as hold by TransDyne Quality Control staff. Reports will be taken off of this page and moved to inbox as soon as you release the report.

QCHold features:

1. Release one or more reports.

2. Print a report.

3. View the history of the report.

4. Filter reports based on provider or report type or approved/unapproved status.

This page mainly consists of two panes viz. Navigation tree and Reports Grid.

Navigation tree: The default tree view displays all providers that have reports available for download and/or print along with the number of reports available for each provider. This tree can be further drilled down to display different report types available for each provider by clicking on a specific provider or by clicking on **_Expand All._** You can also collapse the tree by clicking on the **_Collapse All._**

Clicking on the **_Report Type_** link will change the Tree to display all report types available for download along with the number of reports available and this can be further drilled down to display different providers that have reports of this report type or by clicking on **_Expand All._** You can also collapse the tree by clicking on the **_Collapse All_**

Navigation tree can be changed back and forth between Providers Tree and Report Types tree by clicking on the **_Providers_** link **_or Report Type_** link respectively.

Reports Grid: This grid will list all reports based on the criteria selected in the left hand side navigation tree. The default grid view displays all reports available for review and release.

	Date Of Dictation▲	Date Of Service	MRN	Patient Name	Provider	Report Type			
☐	12/02/08	12/02/08	1000001	MOORE, MELLISA	Paolo Accorit	OFNT			
☐	12/02/08	12/02/08	1000002	CHANG, FRANCISCO	Paolo Accorit	OFNT			
☐	12/02/08	12/02/08	1000003	CRAMER, PHILIP	Paolo Accorit	OFNT			
☐	12/02/08	12/02/08	1000004	CRUZ, ARIA	Paolo Accorit	OFNT			

You can also sort reports ascending or descending by clicking on the column header. The default sorting is done by Date of Dictation. The check boxes to the left are provided to select multiple reports for printing and/or downloading one or more reports.

Release Click on this link to Release one or more reports.

Click on this icon to review/release the report.

Click on this icon to print the report.

Click on this icon to view history of the report.

View History: This feature will allow you to see more detailed information and also history of what happened to this report such as when and who reviewed, previewed, printed or downloaded.

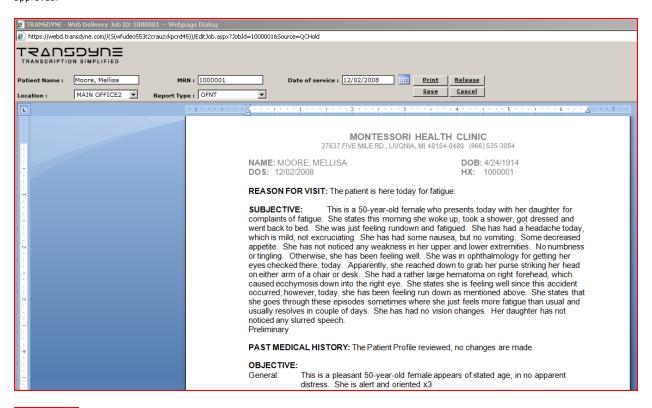**Review / Release:** This feature will allow you to make changes to the content and/or the demographic information and release the report. To review a report click on the word icon 📄 that is available to the right of each report. Once you click on the word icon, you will see a new window with the report as shown below.

Note: This feature requires that you have Microsoft Word installed on your computer. The word icon may not appear if the report is already approved.

Save Clicking on the save button will save your changes and take you back to the QCHold. You can visit this page later to make additional changes.

Release Clicking on the release button will save your changes and also releases it from QCHold and move it to Inbox for normal processing.

Print Click on the print button to print the report.

Cancel Click on the cancel button to cancel changes and take you back to QCHold. You can visit this page later to make additional changes by clicking on the word icon from the reports grid.

Archive

By Date of Service: This feature lets you Search for reports based on Date of Service. This is a quick and easy way to search for reports on patients seen on a certain day or date range. To perform a more extensive search use the Advanced search option as shown in the next page

Click on **Archive** button of the Navigation bar from any page and then click on **By service Date** to search for reports.

Click on this calendar icon to bring up the calendar window.

Click on the '<' link left of the month name to go back a month.

Click on the '>' link right of the month name to go forward a month.

Click on the '<' link left of the year to go back a year.

Click on the '>' link right of the year to go forward a year.

Click on Today link to select the current date.

Click on the date to select the date and close the calendar window.

 Click on this search button to perform search.

From this page you have the same features as Inbox such as Download, Print, Print & Download, Preview reports and View History of a report. Please refer to Inbox features for more information.

Advanced Search: This feature lets you Search for reports based on Date of Service And/or Date of Dictation And/or Patient Name And/or Patient Medical Record Number And/or a Specific provider And/or Report Type And/or Job Status as shown below.

Click on **Archive** button of the Navigation bar from any page and then click on **Advanced Search** to perform Advanced Search.

 Click on this calendar icon to bring up the calendar window.

Click on the '<' link left of the month name to go back a month.

Click on the '>' link right of the month name to go forward a month.

Click on the '<' link left of the year to go back a year.

Click on the '>' link right of the year to go forward a year.

Click on Today link to select the current date.

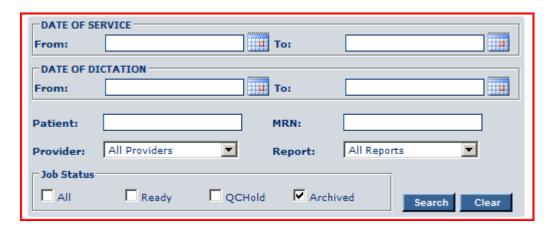Click on the date to select the date and close the calendar window.

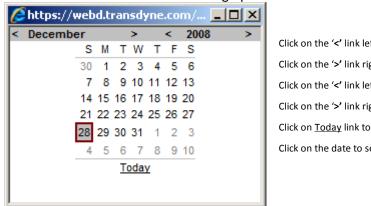 Click on this search button to perform search.

From this page you have the same features as Inbox such as Download, Print, Print & Download, Preview reports and View History of a report. Please refer to Inbox features for more information.

Job Summary

Job Summary displays a summary of jobs such as the number of dictations received, completed, pending proof reading, Pending Transcription, Blank/Invalid dictations and the number of dictations pending approval by provider.
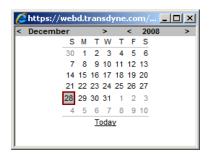
Click on **Job Summary** button of the Navigation bar from any page and then click on "By service Date" to search for reports.

Provider Name	Total Dictations	Completed	Pending Proofreading	Pending Transcription	Blank/Invalid	Pending Approval
Helen Benett	5	5	0	0	0	5
Lesley Brown	5	5	0	0	0	5
Paolo Accorit	5	5	0	0	0	5
Pedro Afonso	5	5	0	0	0	5
Victoria Ashworth	5	5	0	0	0	5

12/02/2008 GO

Found a total of 25 dictations for 12/02/2008

◀PREV   NEXT▶

◀PREV Click on this link view Job Summary of previous day.

NEXT▶ Click on this link view Job Summary of the next day.

Alternatively, you can click on the [calendar icon] calendar icon to bring up the calendar window as shown below and select a date from calendar window and click on the [GO] link to go to a particular day.

Click on the '<' link left of the month name to go back a month.

Click on the '>' link right of the month name to go forward a month.

Click on the '<' link left of the year to go back a year.

Click on the '>' link right of the year to go forward a year.

Click on Today link to select the current date.

Click on the date to select the date and close the calendar window.

You can also click on the provider name to see the details such as the Date time of dictation, date time when job is delivered, TAT, the patient name, MRN, report type, and current status of the job. Please refer to the image below for more information.

Details of Provider: Paolo Accorit

Voice File Name	Duration	Date of Dictation (EST)	Date of Delivery(EST)	TAT	Patient Name	MRN	Report Type	Status
1000001.wav	0H:5M:0S	12-02-08 04:00:00	12-03-08 04:00:00	24H:0M	Moore, Mellisa	1000001	OFNT	Completed
1000002.wav	0H:5M:0S	12-02-08 04:00:00	12-03-08 04:00:00	24H:0M	Chang, Francisco	1000002	OFNT	Completed
1000003.wav	0H:5M:0S	12-02-08 04:00:00	12-03-08 04:00:00	24H:0M	Cramer, Philip	1000003	OFNT	Completed
1000004.wav	0H:5M:0S	12-02-08 04:00:00	12-03-08 04:00:00	24H:0M	Cruz, Aria	1000004	OFNT	Completed
1000005.wav	0H:5M:0S	12-02-08 04:00:00	12-03-08 04:00:00	24H:0M	Devon, Ann	1000005	OFNT	Completed

Messages

Message Center: This page displays all messages you have received from TransDyne support staff and messages you have sent to TransDyne support staff.

Click on **Messages** button of the Navigation bar from any page and then click on "My Messages" to go to Message Center.

Message center has three panes; viz. Folder Tree in the left, Messages Grid in the middle and the Reading pane to the right
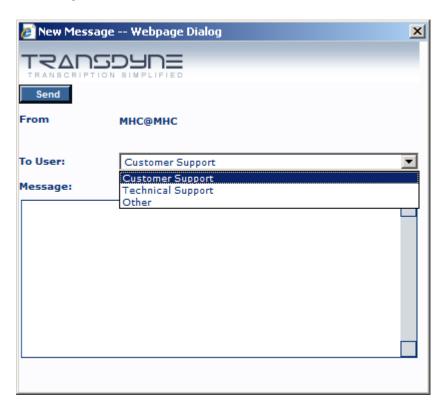
Folder Tree lets you view messages in a particular folder. Click on the folder name to see messages in that folder. Messages Grid will display all messages in a folder as selected in the tree. Reading pane will let you read the message you have selected in the Message Grid.

MESSAGE CENTER				
⊟ All Folders	From	**Message**	DateTime▾	**Header:**
⋯ Inbox	KUMAR@TRANSDYNE	Hello, We need the...	1/2/2009 12:11:57 PM	**From:** KUMAR@TRANSDYNE
⋯ Sent Items				**To:** MHC@MHC
				Created Datetime: 1/2/2009 12:11:57 PM
				Created At: 209.234.195.12
				Message:
				Hello, We need the patient list for Dr. Accorti on 12/29. If you could please fax it to us at your earliest convenience. Thanks Kumar

New Message:

New message page will let you send messages to TransDyne Customer Support, Technical support or to General Support.

Click on **Messages** button of the Navigation bar from any page and then click on "New Message" to go to Message Center.

Select the group you would like to send a message to and type your message in the message section of the page and hit 'Send'. You can view all messages you have sent in the Message Center – sent items folder.

Settings

Manage Locations: This page will let you View/Add/or Modify locations.

Click on *Settings* button of the Navigation bar from any page and then click on "Manage Locations" to View/Add/or Modify Locations. This page has two panes viz. Location list to the left and Location details to the right

To create a new location, fill in the location form and click 'Create' or 'Cancel' to cancel your changes.

To view or modify a Location, select the location from the left location list and view location details or make changes and click 'Update' to save your changes or 'Cancel' to cancel your changes.

To create a new location from the above screen, click 'Cancel' to bring the new blank form.
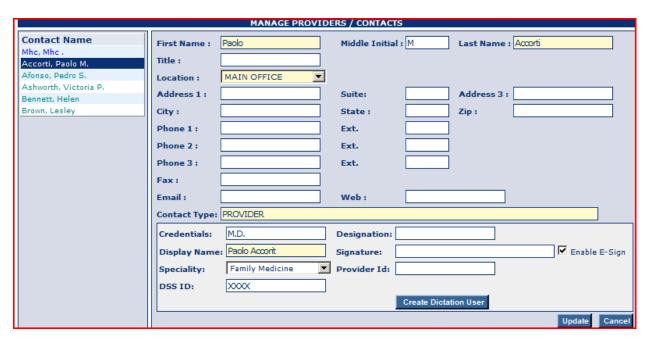
Manage Providers/Contacts:

This page will let you View / Add /Or Modify contacts/providers.

Click on *Settings* button of the Navigation bar from any page and then click on "Manage Providers/Contacts" to View/Add/or Modify Providers/Contacts. This page has two panes viz. Contact/Provider list to the left and Provider/Contact details to the right.

To create a new Contact / Provider, fill in the Contact/Provider form and click 'Create' or 'Cancel' to cancel your changes.

To View/Modify a Contact/Provider ,select the Contact/Provider from the left contact/provider list and view details or make changes and click on 'Update' to save your changes or 'Cancel' to cancel your changes.

Manage Users:

This page will let you View/Add/Or Modify Users.

Click on **Settings** button of the Navigation bar from any page and then click on "Manage Users" to View/Add/or Modify Users. This page has two panes viz. User list to the left and User details to the right.

Web Delivery System supports two different types of Users Viz. Admin, Normal and Upload Only Users. Admin users have full access to the system and can create or modify other users. Normal users have limited access to the system and the access is restricted to the Locations and Providers

To create a new User, fill in the user form and click 'Create' or 'Cancel' to cancel your changes.

To View/Modify a User, select the User from the left User List and view details or make changes and click on 'Update' to save your changes or 'Cancel' to cancel your changes.

To disable a user, select the User from the left User List and click on 'Disable this user'

Change Password:

This page will let you change your password.

Click on *Settings* button of the Navigation bar from any page and then click on "Change Password".

To change password, enter your current password, new password and confirm new password and then click 'Save' to change your password or 'Cancel' to cancel changing your password.