

# TrainingManual

## Template Building Course

OCTOBER 2005

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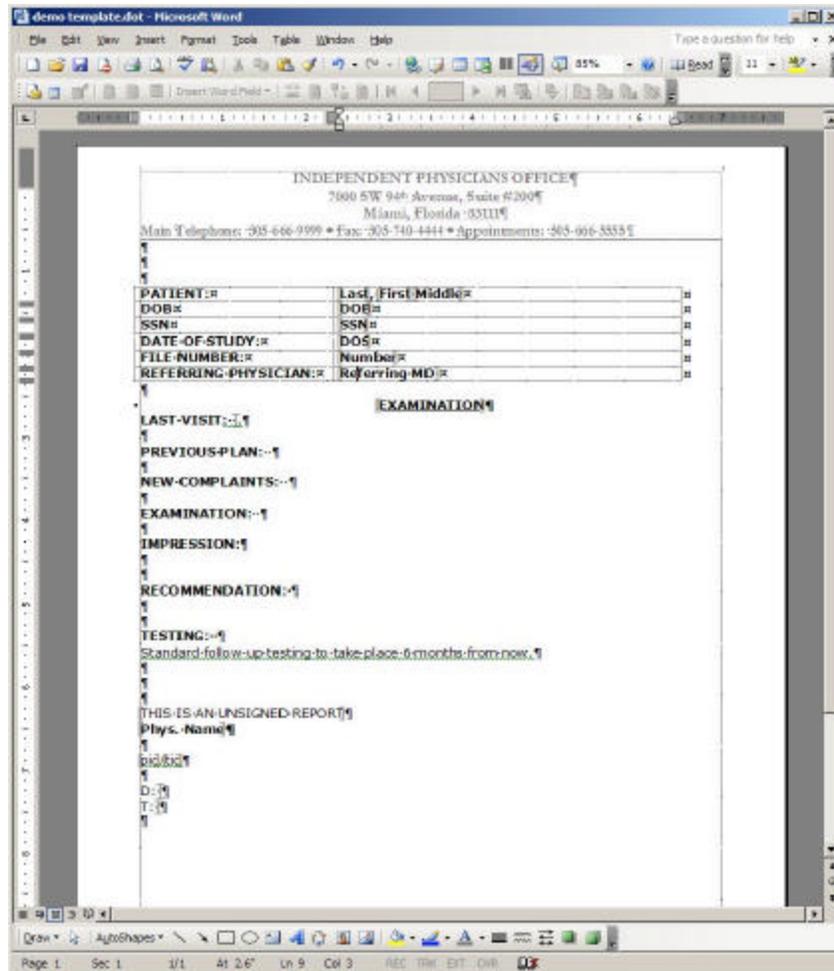
# Template Building Training Manual

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## *Introduction*

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This training manual contains step by step instructions which will walk you through creating your first template called *demo template.dot* (please see below).



Although you will most likely not be able to use this template in your 'live' environment, the skills that you learn during this course will be applicable toward any template creation that you may undertake in the future.

Prior to continuing with this training manual, it will be useful to become familiar with the material in the MDinTouch Template Building Guide. In addition, you should have a good working knowledge of how to use Microsoft Word

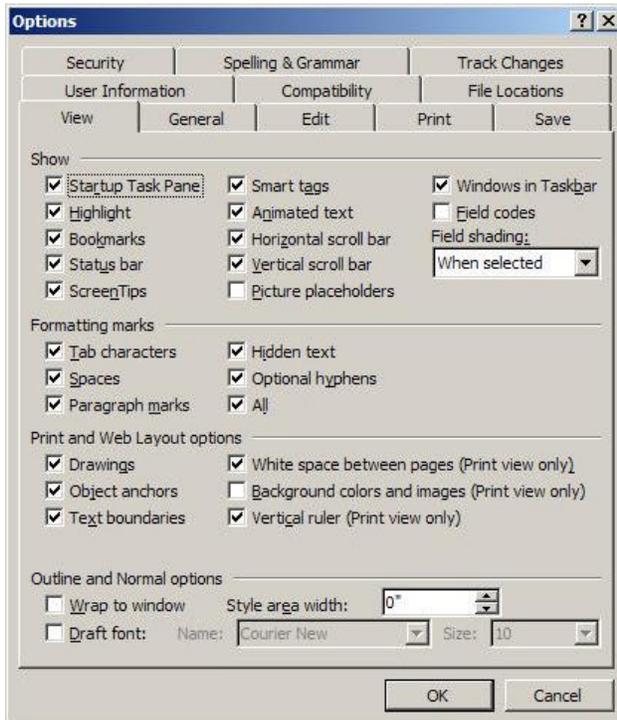
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# Lesson 1 - Setting your Microsoft Word Environment

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Setting your Microsoft Word viewing environment allows you to view hidden characters such as 'carriage returns', 'tabs', and 'spaces' which will save you a tremendous amount of time troubleshooting formatting problems when creating a template .

In order to change your Microsoft Word Environment do the following:



1. Click **T**ools
2. Click **O**ptions
3. Click the **V**iew tab
4. In the *Show* section make sure to check the **B**ookmark option
5. In the *Formatting marks* section make sure to check the **T**ab characters, **S**paces, **P**aragraph marks, **H**idden text, **O**ptional hyphens, and **A**ll options
6. In the *Print and Web Layout* options make sure to check the **D**rawings, **O**bject Anchors, **T**ext boundaries, **W**hite space between pages
7. Click the **O**K button

Once you are back to the main Microsoft Word screen, you will notice many changes to the appearance of your Word files. You will see dots between all the words where spaces normally appear. You will see paragraph marks (like a backward P) where ever you pressed the return key. Don't worry, none of these formatting marks will appear on your printed report. These are just formatting marks that will help you to better understand how your template is laid out.

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## ***Lesson 2 - Creating a Blank Document Template***

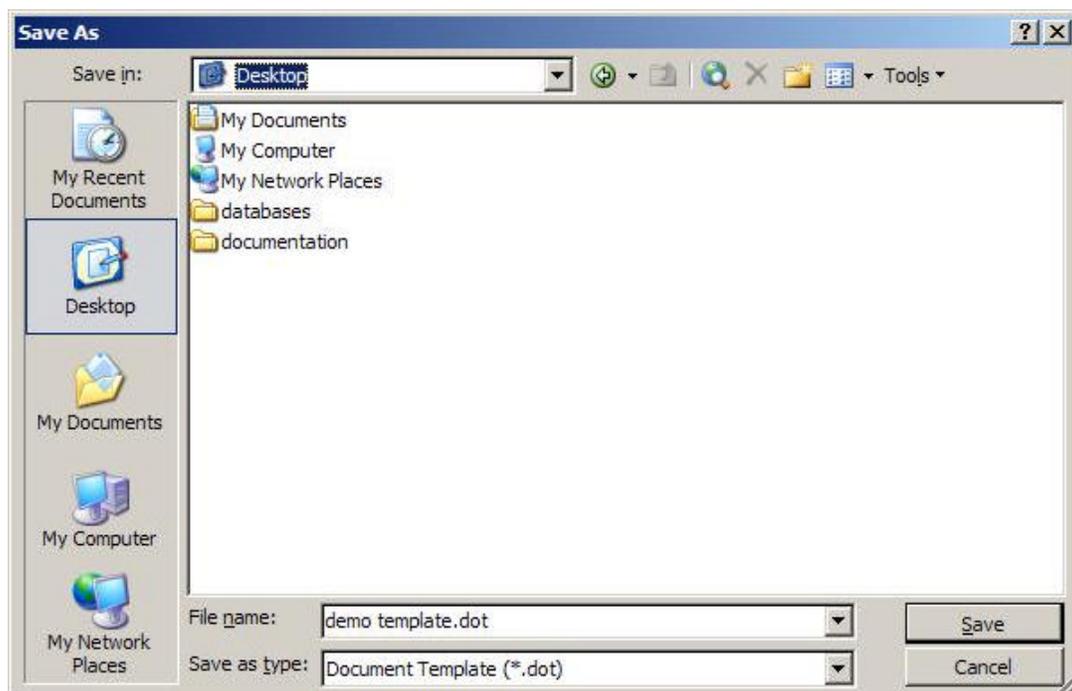
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In Lesson 2, you will create a blank Microsoft Word document template file and save it to your desktop.

Microsoft Word document templates are not much different than regular word documents. For the purposes of this lesson, there is only one real difference of which you need to be aware. Document templates have the file extension **.dot**, whereas Regular Word documents use the file extension **.doc**.

In order to create the document template:

1. Open Microsoft Word
2. Click **File** and then **New**
3. Click **File** and then **Save As**
4. Type *demo template* as the file name
5. In the **Save as type** select *Document Template (\*.dot)*
6. In the **Save in** drop down box, choose *Desktop* as the location where you would like to save the file
7. Click the **Save** button



After completing this Lesson, you will have a file called *demo template.dot* on your desktop.

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## **Lesson 3 - Adding the Patient Demographics**

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In Lesson 3, you will create a table at the top of your template to hold patient demographics. In addition you will insert bookmarks into your template. These bookmarks will pre-fill with patient demographic data when you use TouchType to create a new patient report based on this template.

### **3.1 Inserting Patient Demographic Table**

Tables allow you to line up your data in a more effective and permanent way. Tables are simple grids that are inserted into a template that contain columns and rows. The columns and rows retain their formatting no matter what is typed in the template, and the text within the tables is always perfectly aligned. Tables are most frequently and effectively used for patient demographics at the beginning of document templates

In order to insert a table into your template:

1. If not already open, right click on the *demo template.dot* file on your desktop and select **Open**
2. Create some spacing at the top of the template by pressing the enter key 3 times
3. Click **T**able then **I**nser**T** and then **T**able
4. In the *Number of Columns* field enter 2
5. In the *Number of Rows* field enter 6
6. Click **OK**

You will notice that at the top of your template you will have a table with 2 columns and 6 rows.

7. Enter the following information into the first column so that it resembles the table below (use the bold option and caps lock key for the formatting).

<b>PATIENT:</b>	
<b>DOB:</b>	
<b>SSN:</b>	
<b>DATE OF STUDY:</b>	
<b>FILE NUMBER:</b>	
<b>REFERRING PHYSICIAN:</b>	

### **3.2 Inserting Patient Demographic Bookmarks**

Once you have created the patient demographics table, the next step will be to insert bookmarks into your template which will automatically prefill with patient data when creating a report using TouchType2.

For the purposes of this lesson, you will be inserting bookmarks which include a text 'prompt'. A text prompt is simply text that holds a place for a bookmark. A text prompt may be useful if you want to provide a 'hint' as to what data should be inserted at that bookmark. (For more information on using text prompts with bookmarks, please consult the MDinTouch Template Building Guide.)

In order to create the text prompts for your bookmarks:

1. Enter the following *text prompts* into the second column so that your table resembles the table below.

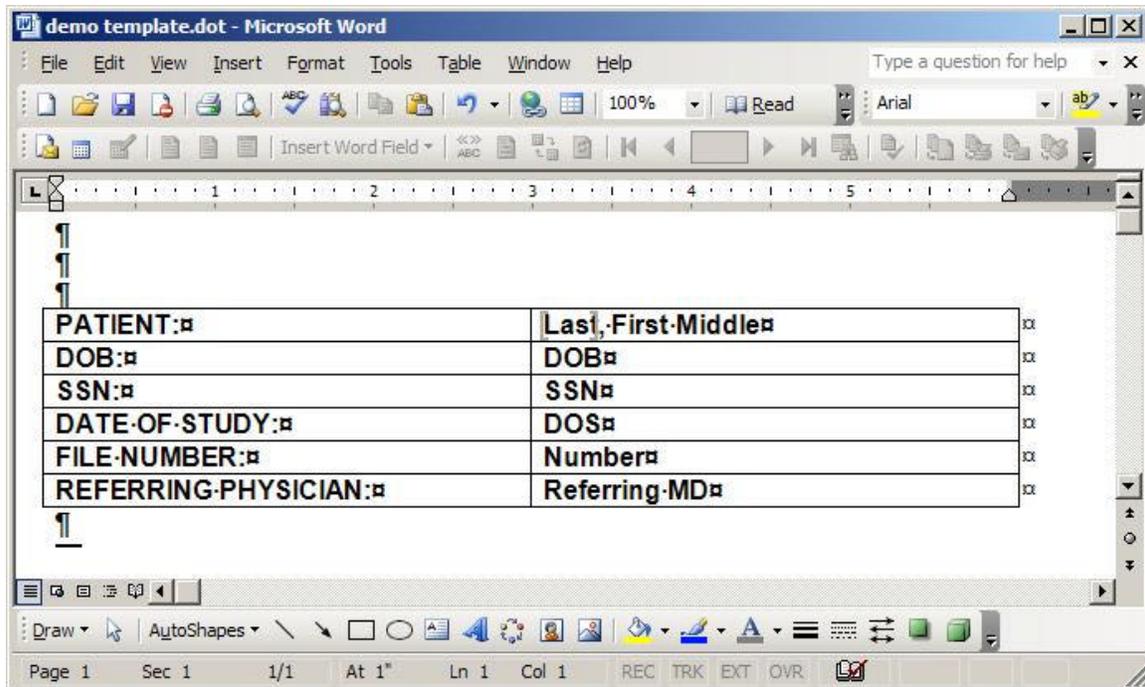
<b>PATIENT:</b>	<b>Last, First Middle</b>
<b>DOB:</b>	<b>DOB</b>
<b>SSN:</b>	<b>SSN</b>
<b>DATE OF STUDY:</b>	<b>DOS</b>
<b>FILE NUMBER:</b>	<b>Number</b>
<b>REFERRING PHYSICIAN:</b>	<b>Referring MD</b>

Once you have entered the text prompts, you are ready to begin inserting the bookmarks for each prompt.



2. Highlight the word *Last* in the first row of the second column
3. Click on **Insert** then **Bookmark**
4. Type in **PATIENT\_LASTNAME** in the *Bookmark name* field
5. Click **Add**

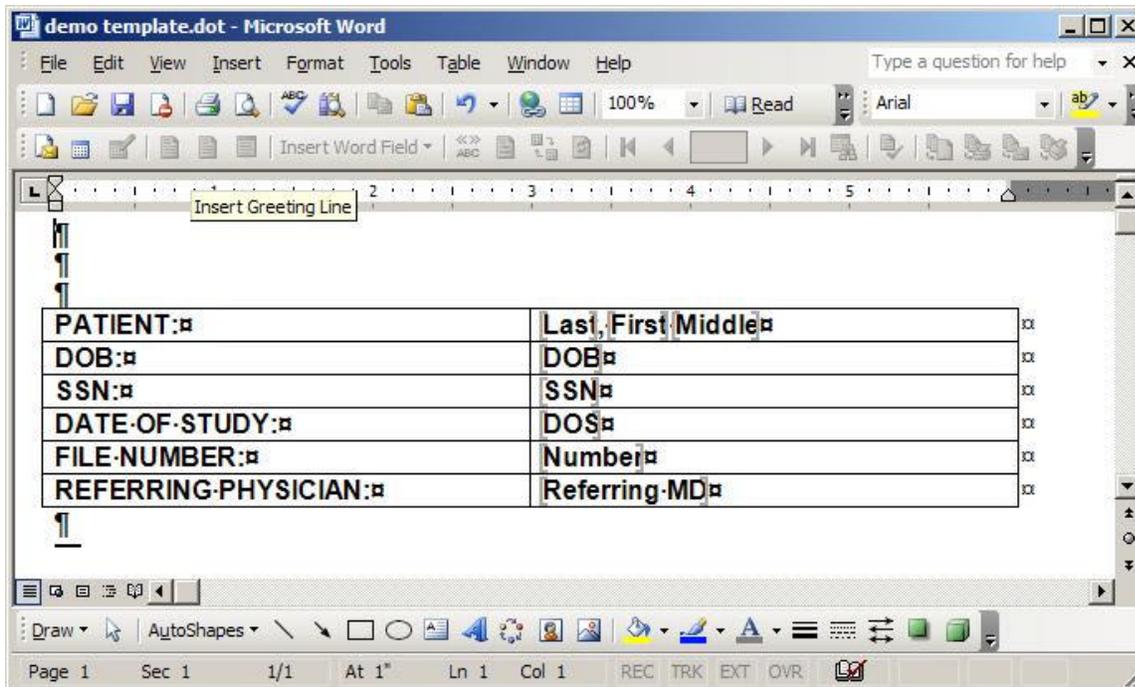
You will notice that the word *Last* is now surrounded by symbols which closely resemble brackets.



These symbols will not be displayed on the printed version of your template. They are only visible as a guide for you to see where the bookmark has been placed.

When creating a patient report in TouchType2, all of the text between the two brackets will be replaced by the bookmark value (in this case the Patient's Last Name). For this reason, it is important to make sure that you have not inadvertently included any other characters inside of your bookmark.

6. Now highlight the word *First* (make sure to leave a space between the comma and *First*)
7. Click on **Insert** then **Bookmark**
8. Type in **PATIENT\_FIRSTNAME** in the *Bookmark name* field
9. Click **Add**
10. Continue to add bookmarks into your table as follows
  - a. *Middle* insert bookmark **PATIENT\_MIDDLENAME**
  - b. *DOB* insert bookmark **PATIENT\_DOB**
  - c. *SSN* insert bookmark **PATIENT\_SSN**
  - d. *DOS* insert bookmark **DATE\_OF\_SERVICE**
  - e. *DOB* insert bookmark **PATIENT\_DOB**
  - f. *Number* insert bookmark **PATIENT\_PATIENTID**
  - g. *Referring MD* insert bookmark **REFER\_PHYSICIANS**
11. Once you have finished, your template should resemble the image below



Notice that each text prompt is surrounded by a bookmark. Also notice that certain characters are not surrounded by bookmarks (specifically, the comma and spaces that you would like to retain after the bookmarks are filled in).

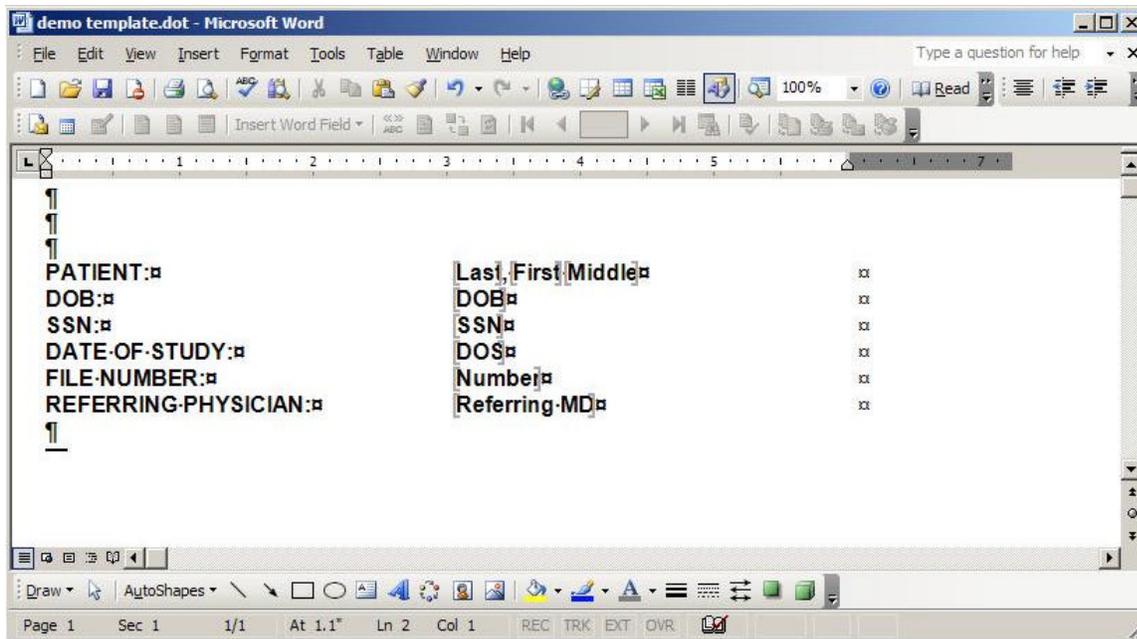
### 3.3 Formatting the Patient Demographics Table

After you have made sure that your template contains all of the bookmarks described above, the final step will be formatting the borders and shading of the table. For our demo template, we will be removing the lines around each table cell for a cleaner look.

In order to format the table:

1. Click anywhere inside the table
2. Click **Table**, then **Select**, and then **Table**
3. Click **Format**, and then **Borders and Shading**
4. In the *Setting* section, click the *None* button
5. Click **OK**

Your table should now be displayed without any lines. Note, you may see dotted lines surrounding your table. These are guide lines to show your table borders, but they will not appear on the printed template. (If you would like to see how your template will look when printed, click **File** and then **Print Preview**.)



Once you have completed this lesson, save the changes you have made to your template by clicking on **File** and then **Save** (you can also click **Ctrl+S** to save your changes).

*You should continue to save your changes periodically (at the minimum, you should save after each lesson).*

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## ***Lesson 4 - Adding the Body***

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In Lesson 4, you will be creating the body of the template. You will also enter a special bookmark, which will indicate where the cursor will be positioned when you open the template to create a patient report in TouchType.

In addition, you will create several section headers and insert a 'stopping point' bookmark for each header. Finally, you will insert some standard text that you would like to appear on all patient reports created from this template.

### ***4.1 Creating the Section Headers***

The section headers are what define the structure of the template. You can use any text you want for the section headers. For the purposes of this lesson, we have used some sample headings that many physician practices use.

1. Type the word *Examination* two lines below the patient demographics table (created in Lesson 3). Make sure to leave a blank line between the table and the 'Examination' line.
2. Bold, Center and Underline the word *Examination*
3. Next, enter the headings: *Last Visit, Previous Plan, New Complaints, Examination, Impression, Recommendation, and Testing*
4. Make sure to leave the appropriate spacing between each heading. (Note that the paragraph marks indicate how many blank lines to insert between each heading.)

Your document template should now resemble the image below.



### 4.3 Inserting Special Bookmarks

There are two special bookmarks that can be used in TouchType. The first special bookmark is the DOCUMENT\_START bookmark. When TouchType opens a new report, the cursor will automatically jump to wherever the DOCUMENT\_START bookmark is inserted. (The second special bookmark is the SIGNBLOCK which will be discussed in the next lesson.)

Enter a DOCUMENT\_START bookmark at the top of your template by doing the following:

1. Highlight the word *Examination*
2. Click on **I**nsert then **B**ookmark
3. Type in **DOCUMENT\_START** in the *Bookmark name* field
4. Click **A**dd

Now, whenever you create a patient report from this template, TouchType will automatically open the template with the *Examination* highlighted.

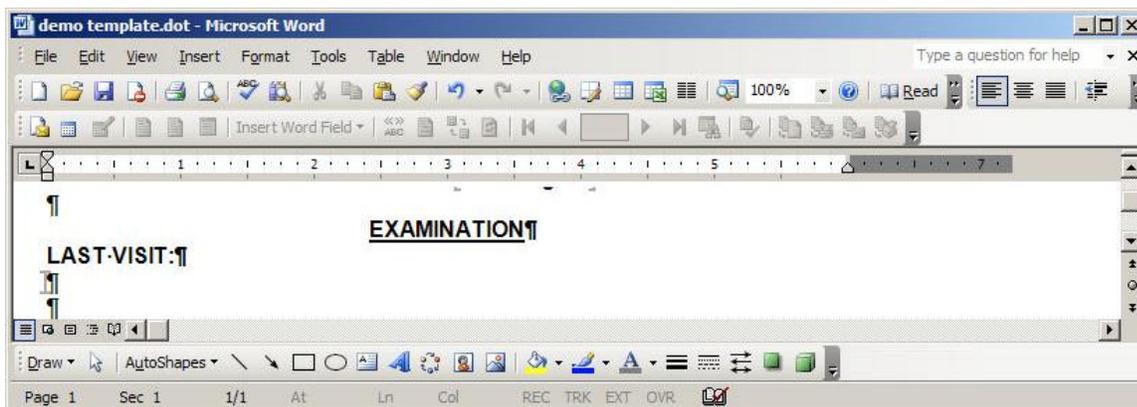
### 4.4 Inserting Navigation Bookmarks

Navigation bookmarks are used to define 'stopping points' at specific sections of the document template where the Transcriptionist should type something. You can use an unlimited number of navigation bookmarks within your document template. Once your document template is complete, you can jump forward and backward from bookmark to bookmark by using the F5 and F6 keys respectively.

Insert a 'stopping point' bookmark below the section heading *Last Visit*.

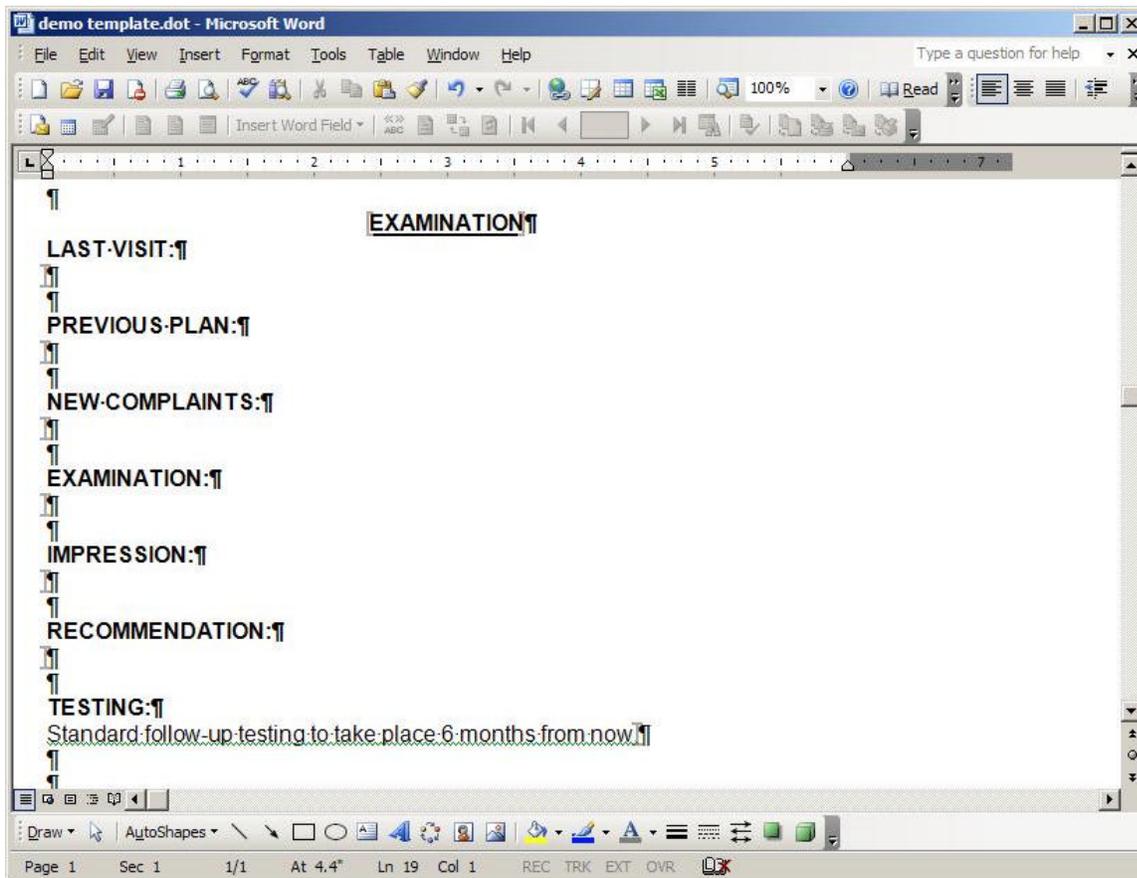
1. Click below the section heading *Last Visit*
2. Click on **I**nsert then **B**ookmark
3. Type in **visit** in the *Bookmark name* field
4. Click **A**dd

You should now see a 'stopping point' bookmark below the section heading *Last Visit*.



- Now, repeat step 4 to insert additional 'stopping point' bookmarks below each section header. (Note: When creating 'stopping point' bookmarks the name of the bookmark is not important).

You should now see a 'stopping point' bookmark below each section heading.



As you use your F5 and F6 keys to navigate through your template, the cursor will jump to these 'stopping point' bookmarks.

*Don't forget to save your changes at the end of this lesson!!*

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## Lesson 5 - Adding the Signoff

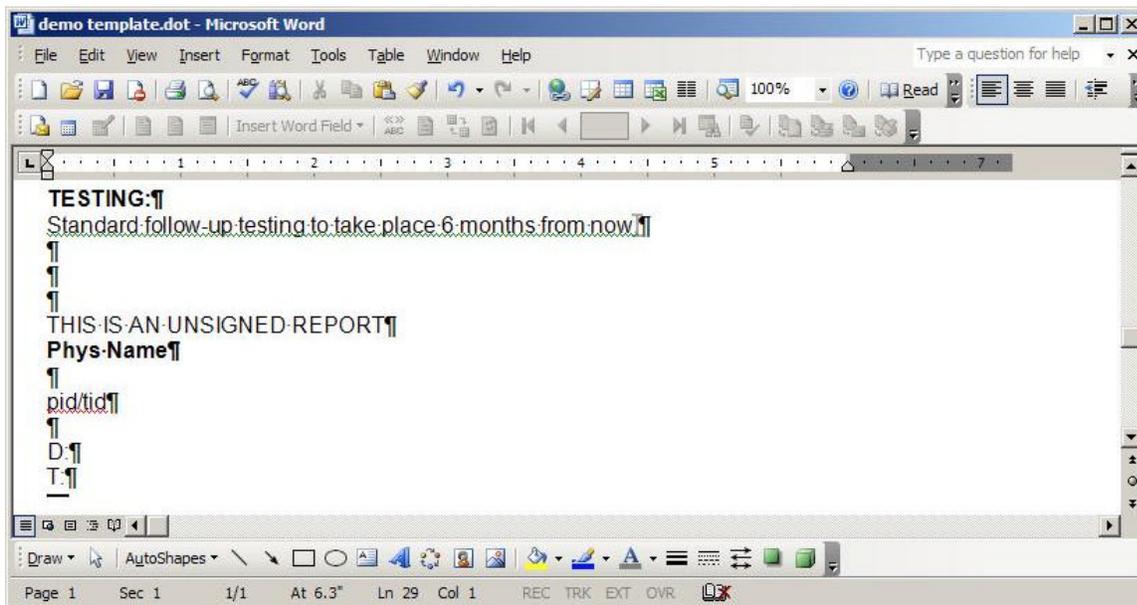
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In Lesson 5 you will add the electronic signature line, the dictating physician name, and the other information that is collectively referred to as the 'signoff'.

Part of the signoff will include the second special bookmark, the SIGNBLOCK. This bookmark is used for any template where the physician requires electronic signature. The SIGNBLOCK is usually placed at the bottom of the template, just above the physician's name. When the report is first created, the SIGNBLOCK displays whatever text is typed for the prompt. Once a report is electronically signed, the SIGNBLOCK is replaced with the text 'THIS REPORT HAS BEEN ELECTRONICALLY SIGNED.'

In order to create the signoff:

1. Type the following text at the bottom of your report so that it resembles the image below:
  - a. THIS IS AN UNSIGNED REPORT
  - b. Phys Name
  - c. pid/tid
  - d. D:
  - e. T:



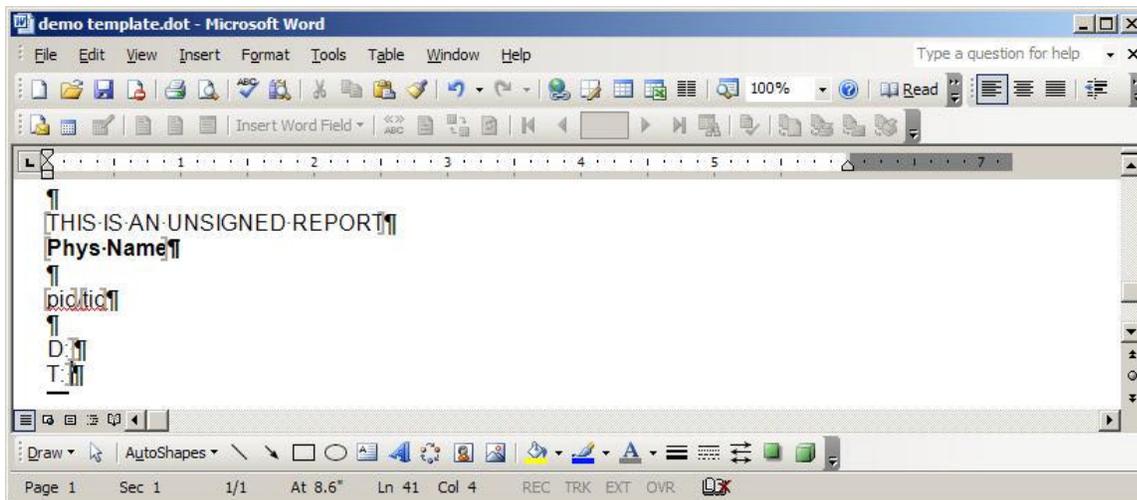
2. Highlight the text *THIS IS AN UNSIGNED REPORT*
3. Click on **Insert** then **Bookmark**
4. Type in **signblock** in the *Bookmark name* field
5. Click **Add**

Note that the text *THIS IS AN UNSIGNED REPORT* text is now surrounded by the *signblock* bookmark. When the dictating physician electronically signs the patient report,

the text inside of the *signblock* will be replaced with the text, *THIS REPORT HAS BEEN ELECTRONICALLY SIGNED.*

6. Next highlight the text *Phys Name*
7. Click on **Insert** then **Bookmark**
8. Type in **DICT\_PHYS\_FULLNAME** in the *Bookmark name* field
9. Click **Add**
10. Continue to add bookmarks for the following text
  - a. *pid* insert bookmark **DICT\_PHYS\_INITIALS**
  - b. *tid* insert bookmark **TRANS\_INITIALS**
  - c. After *D:* insert bookmark **dictdate**
  - d. After *T:* insert bookmark **transdate**

Once completed, your signoff should look like the image below:



*Don't forget to save your changes at the end of this lesson!!*

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## ***Lesson 6 - Creating a Header and Footer***

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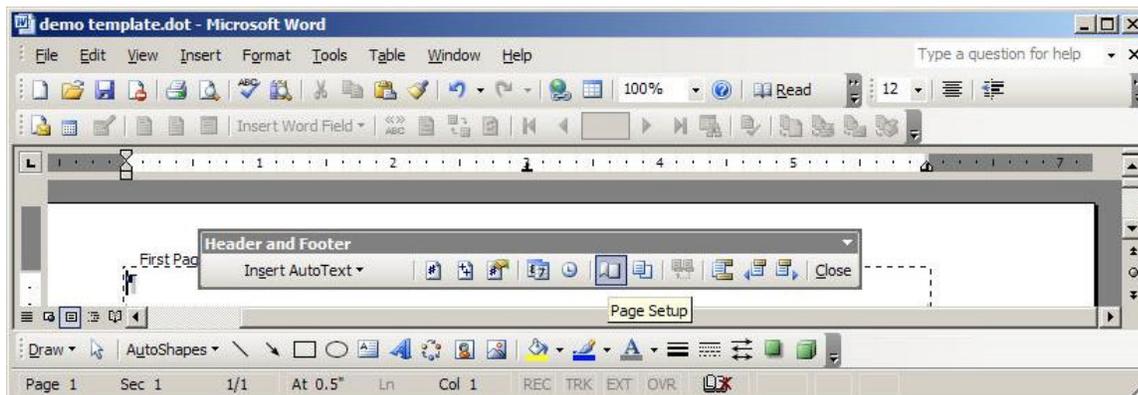
In Lesson 6, you will create a header and footer for your template. The first page header will include the letterhead for a demo practice. The second page header will include patient demographics and other relevant info for the report.

### ***6.1 Formatting the Page Layout***

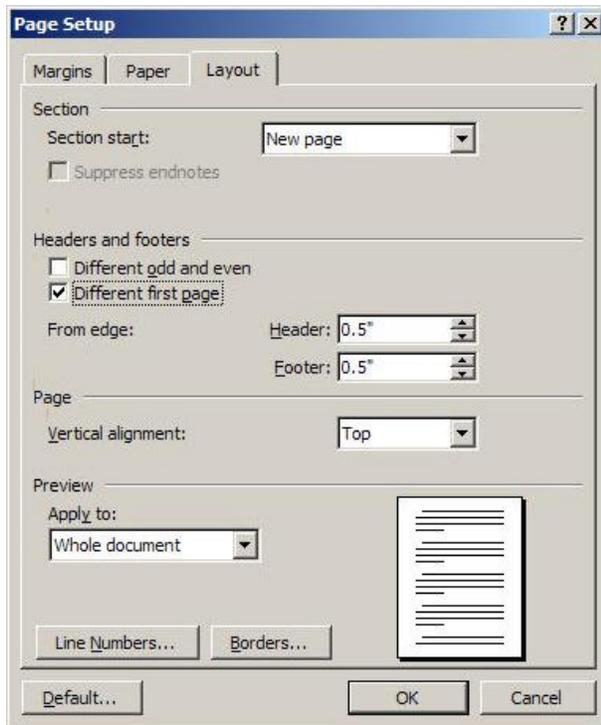
The first step when creating headers and footers is to format your page layout.

In order to format your page layout:

1. Click on **V**iew and then **P**rint Layout
2. Next, view the header and footer by clicking **V**iew and then **H**ader and Footer
3. In the **H**ader and Footer Toolbar click the *Page Setup* Icon



A page setup window will open containing all of the various options available in the page setup. Set the first page to have a different header and footer by doing the following :



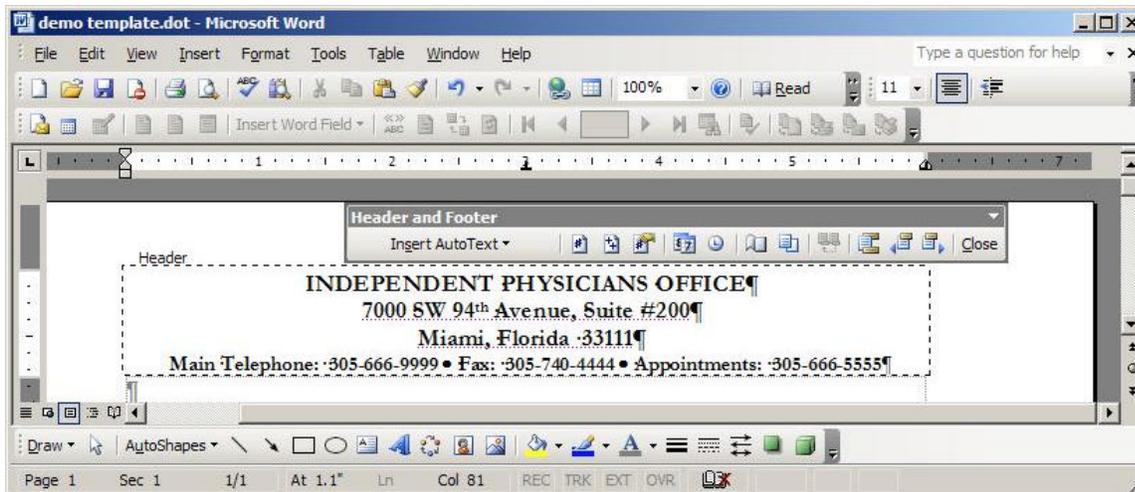
4. Click the *Layout* Tab
5. Check the **Different first page** checkbox
6. Click **OK**

## 6.2 Creating the First Page Header.

Next, create your first page header. The first page header will contain the 'letterhead' information for the template. This information will only appear on the first page, and will not appear on subsequent pages.

In order to create the first page header:

1. Make sure that the cursor is placed in the first page header area.
2. Type the following text in your header
  - a. *Independent Physicians Office*
  - b. *7000 SW 94<sup>th</sup> Avenue, Suite #200*
  - c. *Miami, Florida 33111*
  - d. *Main Telephone: 305-666-9999 · Fax: 305-740-4444 · Appointments: 305-666-5555*
3. Format the text so that it appears like the image below:



4. Click **Close**

This completes your first page header. Next you will create your second page header.

### **6.3 Creating the Second Page Header and Footer**

The second page header is going to contain some text regarding your patient and date of service. Since your template is currently only one page long, you will have to force Microsoft Word to jump to a second page.

1. Press **Ctrl+End** to jump to the end of the first page
2. Press **Ctrl+Enter** to force a new page

Next you will enter text into your second page header.

3. Click **View** and then **Header and Footer**
4. Type the text, *Page*, and then a type a space
5. Click the *Insert Page Number* icon on the *Header and Footer* toolbar

Note that this will insert a Microsoft Word field containing the page number. As you add more pages, this field will be updated on each page to display the correct page number.

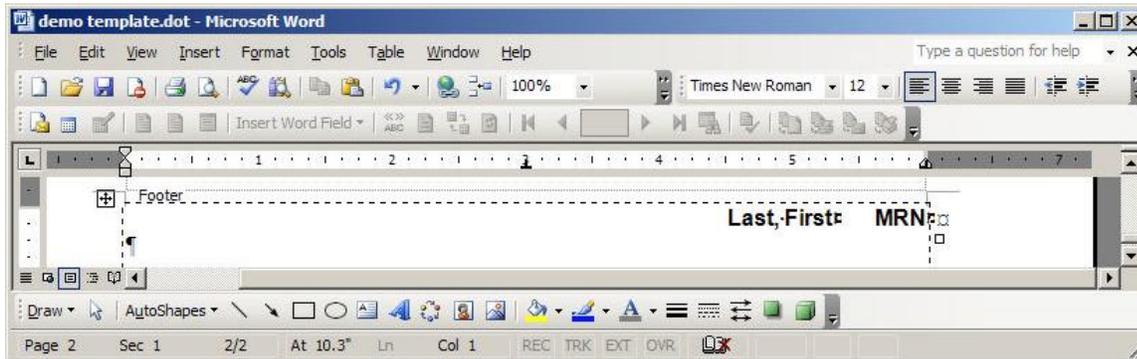
Next you will enter some bookmarks in your header.

6. On the line directly under the page number field, enter the text *Date of Service*
7. Highlight the text and then insert a bookmark named **HEADER\_DATE\_OF\_SERVICE**

This will complete your second page header. Next we will create the second page footer.

8. Click in the footer section on your second page.
9. Insert a table with one row and two columns. (If you do not remember how to insert a table reference Lesson 3).
10. In the first column of the table type the text, *Last, First*

11. In the second column of the table type the text, *MRN*
12. Format the text and remove the table borders so that it appears like the image below



13. Next, insert the following bookmarks in the footer
  - a. *Last* insert bookmark **FOOTER\_PATIENT\_LASTNAME**
  - b. *First* insert bookmark **FOOTER\_PATIENT\_FIRSTNAME**
  - c. *MRN* insert bookmark **PATIENT\_PATIENTID**

Once you have completed creating the footer bookmarks, close the second page footer by clicking the close button on the *Header and Footer* toolbar. Then press the backspace key to remove the page break.

Notice that the second page disappears. Even though there is now no second page, your template will remember the settings that you have entered. You can test this by forcing a new page again and noting that all the data you inserted into the second page header and footer is still there.

*Don't forget to save your changes at the end of this lesson!!*

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## ***Lesson 7 - Using the Template Library***

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Congratulations! Your template is now complete. But what do you do now?

MDinTouch offers a unique tool which allows you to share your templates with any transcriptionists who work on your accounts. This tool is referred to as the Template Library. After creating a new template or modifying an existing template you can upload the changes to the Template Library. Every time a Transcriptionist logs in to TouchType, the software will automatically detect any changes in the templates and will download the most current version.

In order to load your new template into the template library:

1. Log in to the Webtop ([www.mtwebtop.com](http://www.mtwebtop.com))
2. Click the Template Library link at the top of your webtop screen (if you do not see this link, please contact MDinTouch Technical Support)
3. In the drop down box, select the transcription account
4. Click the Browse button
5. Navigate to the location where your template is saved
6. Select your template
7. Click the Open button
8. Click the Upload File(s) button

After loading your templates, the next time you log in to TouchType your local templates will automatically be verified against the templates in the template library. If the system determines that you do not have the most current version of the template, it will automatically download the newer template.

**NOTE:** If you or any of your transcriptionists have made changes to the local copy of your templates, and would like to keep these changes, you should save your version of the templates with a different name than what is used in the template library. Otherwise, each time you log in to TouchType, the software will automatically overwrite your modified templates with the templates that are loaded in the template library.

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## **Conclusion**

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Give your template the ultimate test. Try creating a report using this template in TouchType. Check to see if your bookmarks fill in properly. See if the cursor is in the right position when the template opens. Look at the appearance of the sign off. Check your headers and footers to verify that all the data was filled in properly. Make sure that you can navigate through the template using the F5 and F6 keys.

If everything is working correctly, congratulations. ***You have completed your first MDinTouch template!!***