

ZyDoc TrackDoc

User Manual

Kara Troxler V6 May 2005

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Chapter 1: Welcome To TrackDoc

TrackDoc is a web-based solution where all of your audio dictation files and completed documents are stored. Once a document is uploaded into TrackDoc, it can be reviewed, edited, signed, printed and distributed via fax.

The e-signature in TrackDoc is fully HIPAA compliant and can not be altered.

Both audio and transcribed documents are managed through the TrackDoc system. Additionally, TrackDoc allows the user to search through thousands of jobs - in seconds - to identify one patient, one type of job or even one type of document.

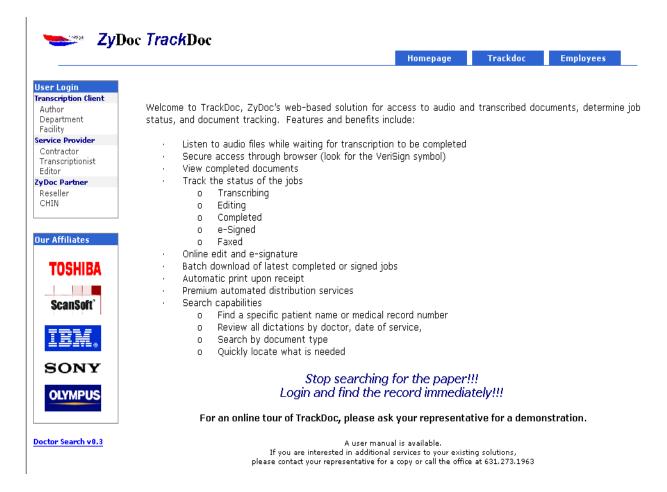


In this manual, you will be introduced to the site and you will learn how to:

- Access audio files
- Listen to a dictation
- Access, Edit, Save, E-sign and Fax a completed document
- Search for specific patients
- Acquire supplemental training for TrackDoc

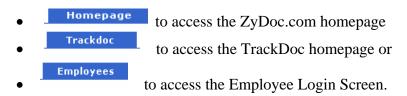
The TrackDoc Homepage

To use TrackDoc, you must first access the ZyDoc TrackDoc homepage. Just type http://www.zydoc.net into your browser and you will be taken to this page:



From this page, you can access three different areas of the ZyDoc System using the tabs in the upper right hand corner of the screen - the Zydoc homepage, the TrackDoc homepage, and the TrackDoc Employee Login Screen.

Simply press



We will take a look at each of these screens later in this section, but for now, let's find out what else we can do from the TrackDoc homepage.

User Login

If you look to the left edge of the TrackDoc homepage, you will see a box titled "User Login" that looks like this:



This box details three user categories:

- Transcription Client
- Service Provider and
- ZyDoc Partner

Each of these user categories is then broken down into particular *types* of users in user sub-categories:

- Transcription Client
 - o Author (clinician)

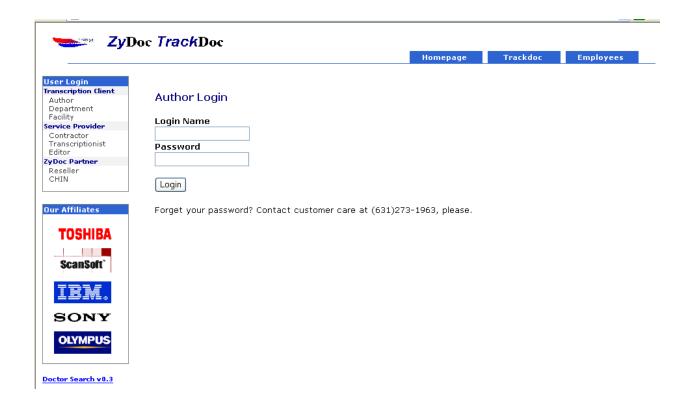
Department

- o Facility
- Service Provider
 - Catractor
 - o Transcriptionist
 - o Editor
- ZyDoc Partner
 - o Reseller
 - o CHIN

Each listed subcategory also acts as a link to that particular type of user's login page. Users are broken down into these categories and sub-categories, based on their security clearance.

Signing In

If you are an Author (clinician) and wish to enter the TrackDoc system, simply click on the word "Author" in the Transcription Client category and you will link into the Author Login page:



From this page, you will enter the TrackDoc system as an Author. If you were another type of user, you would click on that link and you would be taken to that user's login page, e.g. the Department login page or the Reseller login page.

All of the login pages, except the CHIN login page, look the same and require the same two fields of information – Login Name and Password - be completed before you are allowed into the TrackDoc system.

The two login page requirements, Login Name and Password, are part of the security system that protects the TrackDoc system and all of the information it contains.

Our Affiliates

On the left side of the page, under the User Login box, is a box entitled "Our Affiliates":



This section introduces you to some of our prestigious affiliates. If you wish to find out more about any of our listed affiliates, simply click on any of the corporate logos listed in this box and you will be taken to their corporate homepage.

Using the Tabs

Earlier, you were introduced to the three tabs in the upper right hand corner of the TrackDoc homepage:

• Homepage

Trackdoc

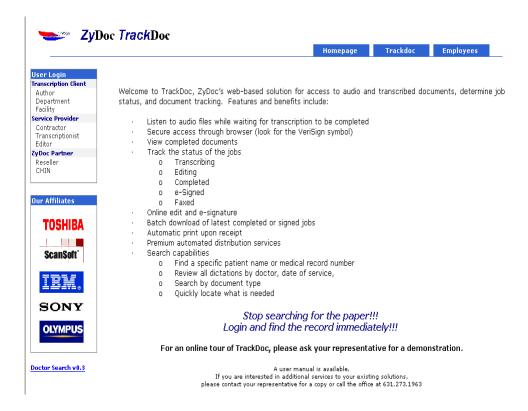
and

Employees

If you click you will be taken to the Zydoc.com homepage, where you can learn more about our company, products and services:



If you click you will be taken to the TrackDoc homepage:



And Finally, if you click on screen:

you will be taken to the Employee Login



Employees

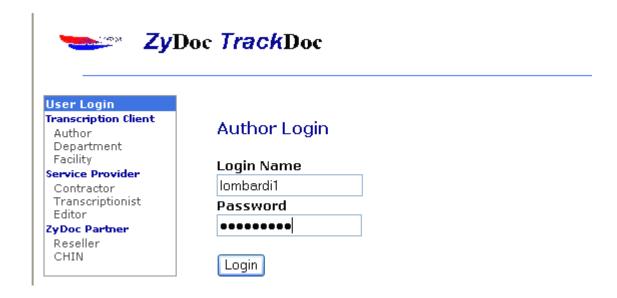
The Employee Login Screen has two required fields, Login Name and Password, which must be completed before you will be allowed to enter the TrackDoc system. After entering the appropriate information, you will be taken into the system and allowed to manipulate any information stored for you.

Chapter 2: Entering TrackDoc

In this section, you will be taken on a tour of the TrackDoc system as an Author. To Enter the system as an Author, you must

- 1. access the TrackDoc homepage by typing http://zydoc.net/ into your browser
- 2. Click on the word "Author" in the User Login box, under the Transcription Client category
- 3. Enter your Login Name and Password in the appropriate fields on the Author Login page
- 4. Click Login on the Author Login screen.

Once you have filled in the required fields on the Author Login screen, it should look something like this:



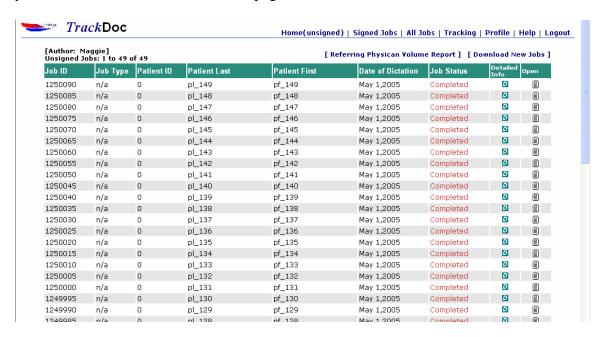
If any of the required information you entered was incorrect, you will get this prompt:

Login Failed, please try again.

Simply reenter your information with careful attention to spelling and making sure you are entering the correct information. Login Names and passwords are **NOT** casesensitive.

Author Homepage

Once you correctly enter all of the required information and click on the Login button, you will be taken to the Author homepage screen:



This page lists all of your unsigned jobs and details them by

- Job ID
- Job Type
- Patient ID
- Patient Last (patient last name)
- Patient First (patient first name)
- Date of Dictation
- Job Status
- Detailed Info and
- Open

Additionally, from this page, you can access links to:

- Home (unsigned)
- Signed Jobs
- All Jobs
- Tracking
- Profile
- Help
- Logout

Section 1: Unsigned Jobs: Detailed Info and Open

You will notice that under the Detailed Info and Open categories are links to more information about the particular job.

Detailed Info

For instance, if you click on the **D** button under the Detailed Info category of the first job listed, you will be taken to the Job Detail page:



Home(unsigned) | Signed Jobs | All Jobs | Tracking | Profile | Help | Logout

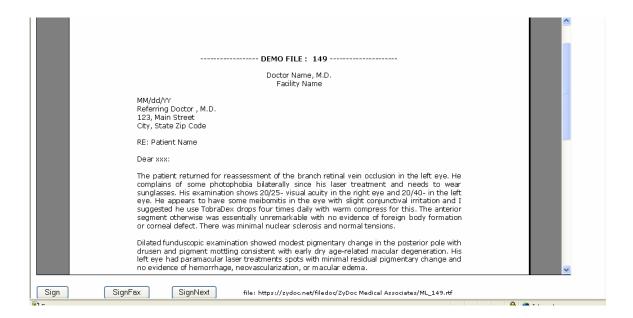
Job Detail					
Job ID	1223968				
Job Type	ECA				
Expected TAT	0				
Privacy Level	High				
Job Status	Completed				
Audio File					
Audio Length	147				
Text File	Smith_Daniel02092005_E0	CA 0147 25 Lomb	ardiM 1213844412728	317td3333346.	rtf 🖺
Text Length	25		_		
Patient SSN	-				
Patient Last	Smith				
Patient First	Daniel				
Date of Dictation	Wednesday, February 09, 200	05			
Due In					
To ZyDoc	Thursday, February 24, 2005				
Signed At	Tuesday, March 01, 2005 2:42				
To Author	Tuesday, March 01, 2005 11:2	27:45 AM			
Comments	multiple audio				
Fax Log:					
Fax ID Contact	Fax# Requ	iested At	Faxed At	Fax Status	Log

This page details all sorts of information about the particular job you are looking into. On the Job Detail page, you can see a history of any and all work done on the job since it was created and any faxes that have been sent out or received concerning this job.

Within the job detail you are able to access audio files and and/or text files and any other files associated with the job.

Open

If you click on the button, under the "Open" category, you will be shown the detail on any documents that have been issued regarding this job. For example, I clicked on the button for the first job listed on our sample Author homepage (Job ID # 1250090) and was taken to this page showing a sample letter regarding this job:



If you click on the Sign button, your signature will be inserted into the current document and you will be taken back to the Author homepage.

If you click on the SignFax button, you will be taken to this page:



From this page, you may choose which Doctors or associates you would like to send the document to by selecting the boxes next to their name. Note that each person's fax number is listed next to their name to help determine if the most current number is being used.

You can also add or delete Doctors and associates from this list. Clicking on the <u>Delete</u> link automatically deletes the name. If you click on the <u>I Add New Contacts 1</u> link, you will be taken to this page:

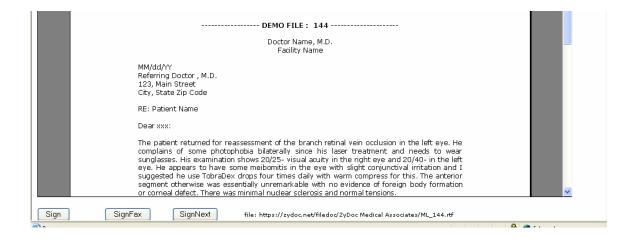
*** TrackDoc	Home(unsigned) Signed Jobs All Jobs Tracking Profile Help Logout
Create Contacts	
Contact Name	(e.g. Smith, John M.D.)
	123-456-7890)
Submit	
AMA Physician Search	

Simply add the information into the correct field, click Submit and the new contact will immediately appear on your list of contacts.

When you are finished selecting names or adding contacts, simply click the button and the fax will be sent and you will be returned to the homepage.

*Note, for your convenience, a quick link to the AMA Physician Search is available on this page.

Finally, If you click on the SignNext button, your signature will be inserted on the current document and you will be taken to the next unsigned and uncompleted document associated with this job.



Referring Physician Volume Report*

From the Author homepage, you may click on the [Referring Physican Volume Report] and you will see this message pop-up:

The ZyDoc Referring Physician Volume Report comes as part of ZyFax 2, our automated referral communications system. Same time and effort, ensure 100% compliance with HIPAA coversheet rules, and analyze your referral network volume by doctor -- all with ZyFax 2. Speak to a representative today to have ZyFax activated for your account. Call 631-273-1963

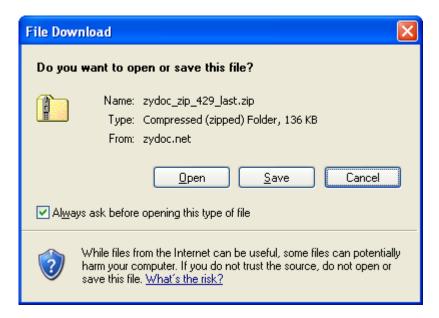
*The Referring Physician Volume Report is a work in Progress. Please check with us for further information, or occasionally press on the link to view future capabilities.

Section 2: Download New Jobs

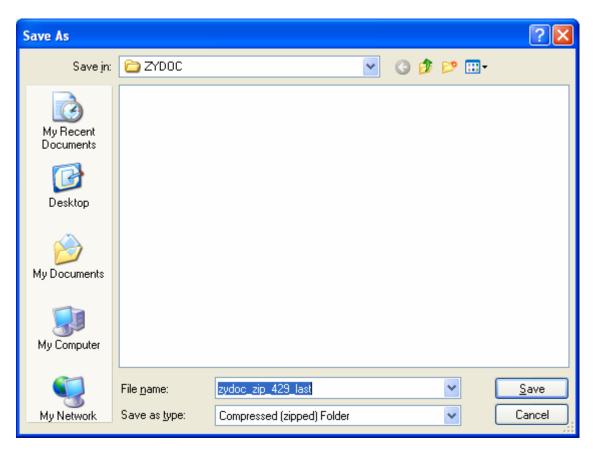
If you prefer to save jobs to your computer or workstation, you may do so by clicking on the [Download New Jobs] link on your homepage.



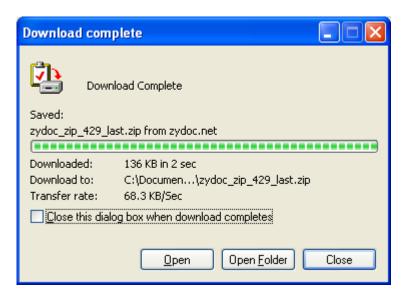
From this page, click on the <u>last download</u> link and this screen should pop up:



Select the Save option, and this screen will appear:

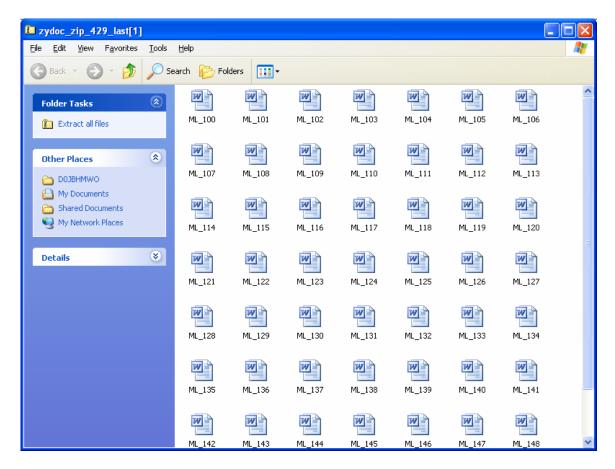


Click save again, the following screen will appear:

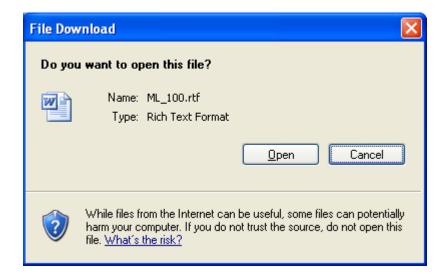


Click open and you will be able to access the documents offline.

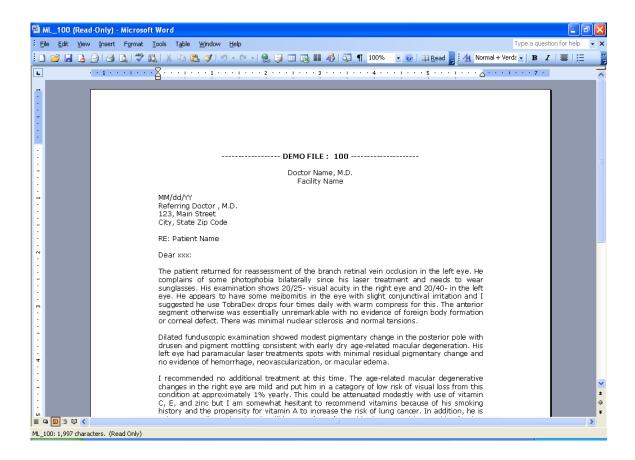
The files will appear looking something like this:



Click on the particular document you wish to open and you will receive this prompt:



Select open, again and the file will open:



From here you can review, edit and otherwise manipulate the document from your workstation whether you're online or off.

Section 3: Access Links from the Author Homepage

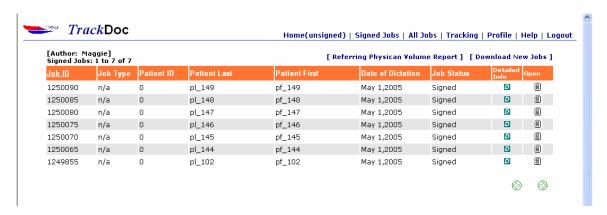
This section will detail the Access Links on the Author homepage that you were briefly introduced to at the beginning of this section. These links can be found in the upper right hand side of the Author homepage.

Home (unsigned)

By clicking on the Home (unsigned) tab you will be taken to the Author homepage, which we have already explored.

Signed Jobs

Clicking on the Signed Jobs tab, will take you to this screen:

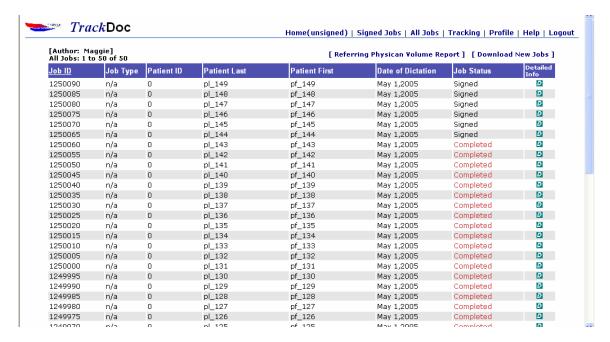


Here you see the detail of all of the signed jobs you have completed, with the same "detailed info" and "open" options that we examined earlier in the Author homepage.

From this page, you can view any document with its signature and print it. To make changes to any document listed here, go to the job detail page and click the AMEND link. Once the changes are made, you may re-sign the document and fax it when you are ready.

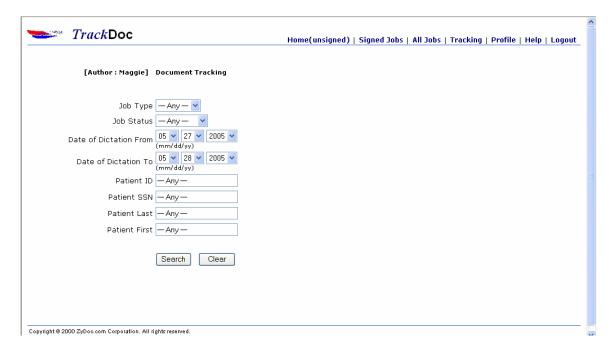
All Jobs

This screen gives you a detailed list of all of the jobs you are or have worked on and their current status as well as access to the "Detailed Info" page regarding any particular job.



Tracking

This page allows you search specific document types, patients, jobs and date ranges



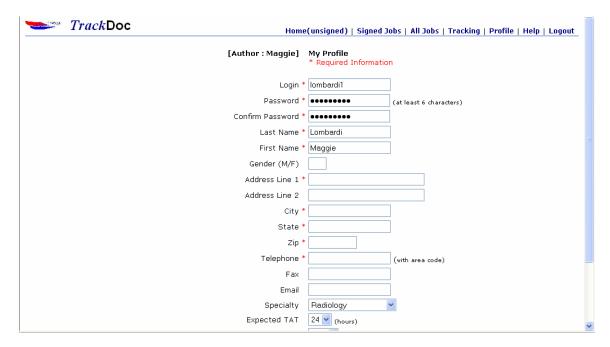
Simply enter the data you have concerning a document, patient or job into the appropriate field and press the search button. Any results will be listed on a screen like the following:



** I could not get a results screen with actual results on it – will update when ready

Profile

This screen shows you the Author's profile. All the fields marked with a red asterisk * are required fields. To change or update any information on this page, simply enter the new data into the appropriate field and click the update button.



Help

From this page, you can access a number of documents to help you with various aspects of our system, from this manual to instructions on dictation and using Zipit, to the AMA physician search, this section will lead you to the information to answer any remaining questions you may have.



If you wish to know more about the system, our technicians are always on hand to provide you with assistance and any supplemental training you may require. Simply contact our office at:

Zydoc 631-273-1963 8am to 5pm Monday-Friday