MEDTRAINING DOCUMENT UPLOADING

☒ **St. Joseph Medical Center Tacoma, WA**   ☒ **St. Clare Hospital Lakewood, WA**   ☒ **St. Elizabeth Hospital Enumclaw, WA**
☒ **St. Francis Hospital Federal Way, WA**   ☒ **St. Anthony Hospital Gig Harbor, WA**   ☒ **PSC**

PURPOSE

To provide instruction for how to upload new or revised documents to the Medical Training Solutions (MTS) website at www.medtraining.org for documentation of staff review of new Franciscan Health System Laboratory documents.

BACKGROUND

The MTS system has the functionality to notify staff of new or revised documents, and time stamps the attestation of the staff review. Reports can be pulled to show dates of review by staff member. The Lab portal can be subscribed to so that persons can be alerted when there are additions to the lab portal to begin the staff review process. Groups of users can be created by administrators to make the assignment of documents for review more efficient. New versions of existing documents on the MTS system can be uploaded.

RELATED DOCUMENTS

http://www.medtraining.org/ltac3/adminInstructions.pdf

STEPS FOR MTS ADMINISTRATORS LOADING DOCUMENTS

1. Open FHS Lab portal from FHS intranet

2. Choose Manuals

3. Locate the document to be uploaded and open it

4. Copy the web address displayed while the document is opened (Cntl-C)

5. Go to www.medtraining.org

6. Login with user name and password

7. Click on the Content button at the top of your screen

8. Click on the Franciscan Health System, WA Content tab to display the FHS content locations.

9. Find the section the document will be assigned to and click on the + sign to add a document. An example of a section is Quality Plan.

10. A window opens to choose where to ADD the new file or Folder. Place the radio dial in Custom Document.

11. Type in the Title of the new file or folder.

12. Click on the title that was created in the Franciscan Health System, WA Content after performing step 11.
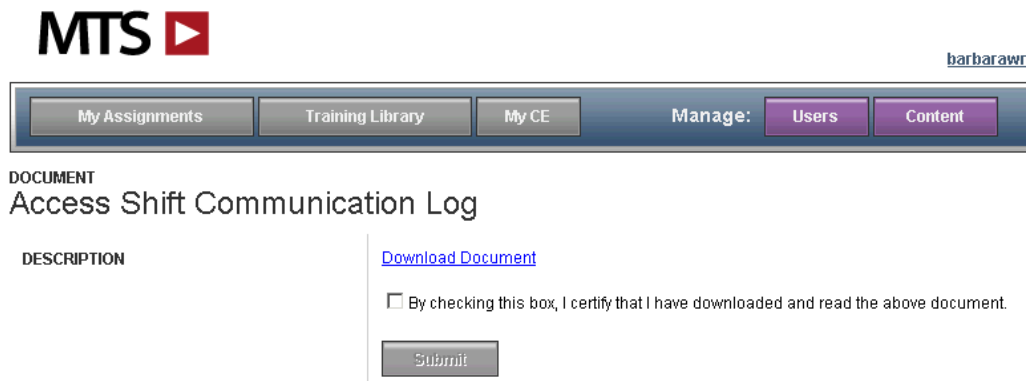
13. Click on the Edit button.

14. A window opens to allow entry of the document or folder title, start date, end date, topic (optional), Author (optional) and description (optional). Let the end date default.

15. Enter the version date, title, start date, author.

16. Click the Browse button to find the document for review usually located in the Document Control backup folder.

17. The file path appears in the window.

18. Always request a read receipt and add version notes if desired.

19. Click on the Save Changes button. A document hyperlink will appear under Document File when this is done correctly.

20. You can add a post-test to follow the document review if desired. Scroll down and click the "Add Custom Test and follow the prompts)

ASSIGNING DOCUMENT REVIEW TO MTS GROUPS BY ADMINISTRATOR

1. Sign on to Med Training if you are not signed on

2. Click on USERS (purple button)

3. Select user group on left side navigation panel

4. To select all users in the displayed group, click box next to Name in black header row

5. To select just some users in group, click or unclick the box beside each name

6. After users have been selected, click on ASSIGN (blue check above)

7. From the displayed content, find the document(s) to assign and click the box next to each (can select more than one at a time)

8. Click Assign (blue button on bottom)

9. Next click on NOTIFY (yellow button) – this prepares the email that will be sent to your staff

10. Select the right Template. Click drop down box on right side. Document Review Required, is the last template. Choose it.

11. Edit the message or accept the standard template.

12. Click SEND

13. You will get a notification that an email has been sent to the users you assigned.

STAFF NOTIFICATION BY EMAIL TO REVIEW DOCUMENTS

14. The users get an email at their user ID which is their FHS email address and click on the displayed link. Note their password to the MTS site is included with the link if it does not work

15. When logged into the www.medtraining.org site, click on MY ASSIGNMENTS

16. Any document review assignment will be listed, along with any that have been completed showing the completion dates.

17. Click on the FHS Content that has been assigned for review. The screen below pops up and the document is downloaded to review on line. The reader checks the box to acknowledge their review, and clicks on Submit, the document review is time and date stamped for tracking purposes.
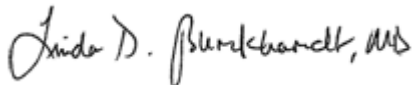
MTS ▶

barbarawr

| My Assignments | Training Library | My CE | Manage: | Users | Content |

DOCUMENT
Access Shift Communication Log

DESCRIPTION   Download Document

☐ By checking this box, I certify that I have downloaded and read the above document.

Submit

TRACKING DOCUMENT REVIEW COMPLIANCE

1. Click on Users and select the desired group from the drop box on the left side of the page

2. Select the user(s) you would like to create the report for

3. Select the test period(s) you would like the report to show from the Period drop box

4. Select the programs(s) you would like the report to show from the Program drop box. Select Franciscan Health System, WA Content for document review.

5. The report will display Only Active users (default) unless Only deleted users, or Only Users with Incomplete Assignments is selected by checking the box.

- Assigned and complete – will show all assignments for each user, if they have completed a test you will see the completed date and score
- Completed only – will only show tests that have been completed
- Uncompleted only – will show all tests that have not been completed
- Full test history – will show all assigned and completed as well as any tests that have been reset

6. Select the desired report format: PDF or CSV, and if one user per page is desired.

7. Click the Download button to generate your report

REFERENCES

How-to-Video for MTS Administrators

DOCUMENT APPROVAL	Purpose of Document / Reason for Change:		
Updated instructions for current MTS displays and prompts for loading FHS document review content.			
☐ *No significant change to process in above revision. Per CAP, this revision does not require further Medical Director approval.*			
Committee Approval Date	☒ Date: 8/29/13 ☐ N/A – revision of department-specific document which is used at only one facility	**Medical Director Approval** *(Electronic Signature)*	*Linda D. Blunkhardt, MD* 8/30/13