Custom Study Types Guidance

For most study types, the MyChoices form will be sufficient for determining how to configure the worksheet and report. However, Angiography, X-rays and custom study types built from the Unassigned study type are more flexible and open-ended, and therefore, cannot be configured by sending the client a form to complete. For these study types, the Studycast Product Training Specialist or another customer-facing team member will need to work directly with the client to determine how to configure the worksheet and report to best meet the client's needs.

Configurable items include

- Protocols
- Procedure statements
- Up to 5 Findings sections with custom labels
- Label for Conclusions
- Custom statements for Findings and Conclusions
- Worksheet Presets

Before the Call

Identify which of the custom study types/procedures the facility performs (refer to the Client Information Form).

You might want to ask the client for sample reports for each procedure/imaging exam performed, or ask if they already have macro statements in a digital format, such as a Word document.

During the Call

Be prepared to show the client how they can build a report:

1. Select the appropriate study type.
2. Select the appropriate procedure and preview the report to show the procedure statement (with and without informed consent).

5510 Six Forks Road, Suite 200, Raleigh, NC 27609 U.S.A. Phone: 866.209.3393 Fax: 866.332.2719

3. Return to the worksheet and choose an additional comment statement from each findings section. Choose an additional comment from the conclusions section. Show how you can double click on XXX in the findings to add a value. Show how you can also
   - Free type a new statement and add it to the pick list
   - Reorder the statements
   - Delete statements
4. Preview the report. Confirm the client is satisfied and note any concerns they share. You might need to discuss report options to address the client's needs.
5. Then, clear the findings and conclusions and demonstrate the preset favorite that plugs in all findings and conclusions you entered individually.
6. The Studycast Demo account has been set up with 3 variations of the custom items noted above. Go to another template and show the client one of the variations that illustrates a different set of Findings section labels and procedure statements. On the Angiography worksheet, show the findings generated from the interactive diagram.

Ask the client if they would like to use the defaults we have or if we can help them modify the Findings section labels and/or add their own custom findings statements and/or preset favorites. Also, if the facility uses dictation software, let them know how that will interact with the Studycast worksheet.

The goal is to determine the exam types and, if relevant, the protocols within each exam type that the client performs. Also, discuss custom procedure statements and demonstrate how those statements appear on the report. Keep this as simple and straightforward as possible for the client. If the defaults work, great. If not, tailor the worksheet to their needs. Don't forget to review Conclusions and Recommendations labels.

Build out the custom items for the client.

Configuration Options for Worksheet Sections

Patient Info and Indications Sections

The labels in the Patient Info section can be changed on the report if needed. Review the client's sample report and discuss any modifications they want.

For example, if a client's report has a Patient History form, ask if the Studycast Clinical History field would suffice. Clients might want to document other items unique to their facility. Often, some of these fields can be repurposed to meet their needs.

After the Call

Follow the procedure described in WI-75-04-530 Scheduling and Delivering Studycast Training for completing any client training.