

BASIC HELP GUIDE FOR CLINICIANS



ADVANCED TRANSCRIPTION WORKFLOW

SecureXFlow is a trusted medical documentation solution for ASCs, physician practices and hospitals nationwide. The application is cloud-based, can be used on any browser and does not require any software purchase or install. Every new customer goes through a Kickoff Call and Training to get familiar with SecureXFlow application. During the Training, our Help Desk works with physician practice/ASC staff and gets a detailed understanding of their workflow, PHI processes, EHR interface requirements if any, number of users who need access to **SecureXFlow** application and so on.

Registration and Login

- Once your user profile is created, you will receive a registration email from donotreply@medofficepro.com. If you are not able to find it in your mail inbox, check your spam folder. Click on the link in the email or copy and paste in any browser and follow prompts on the screen to set up your security questions and set your password.
- **SecureXFlow** uses two-factor authentication for better security and HIPAA compliance. So, follow the on-screen prompts, use the Activation code provided, to complete the registration process.

SecureXFlow
ADVANCED TRANSCRIPTION WORKFLOW

Username

Password

LOGIN

[Forgot Username/Password?](#)

Dashboard

After successful login, you will see a Dashboard with important links to access reports at different levels with ease. **New Reports** link shows your reports that have been transcribed and are ready for your review. This is a key link to get access to new reports daily. Reports will move out of the **New Reports** link based on preferences you set in SecureXFlow. You can choose to move them out after you **Print** or **Download** or you can move them out by clicking on the **Complete** button. Any report that is flagged by a transcriptionist for blanks, missing demographics or any other reason can be accessed from the **Exceptions** link.

Status Summary (Last 15 Days)

- ➔ **New Reports** (57)
- ➔ **Pending Signature** (62)
- ➔ **Pending Transcriptions** (4)
- ➔ **Reports with Exceptions** (5)
- ➔ **Unable to process Faxes** (0)

Navigation Bar



Icons for **Quick Links** appear on top and also on the left - what we refer to as **Navigation Bar**.

Navigation Bar on the left has other links and functions as well that are described later in this Help Guide. In the **Quick Links** at the top of the screen, if you hover your cursor over the icons, it will describe the function of each icon. Click on the three horizontal lines icon to go to full screen mode and where you can view the entire navigation bar on the left.

- Quick Links >
- Exceptions >
- Visit Management >
- Logs >
- Customer Care >
- User Setup >

New Reports

The list view below shows most commonly used links or action buttons by clinicians. When you click on the **New Reports** link, you will get a list of reports which you can print. Typically, users will select all reports and

print or download them. These reports are deemed by our professional transcriptionists ready for printing. Some of the other activities that you can accomplish from this view include:

- **View/Edit:** To View a report, check the box on the left and then click on **View/Edit** in the menu. You can open multiple reports with when you check multiple boxes in the list view. When you close one report, you will see the next report you have selected. If you make an **Edit** in a report, be sure to **Save** it before moving to the next report.

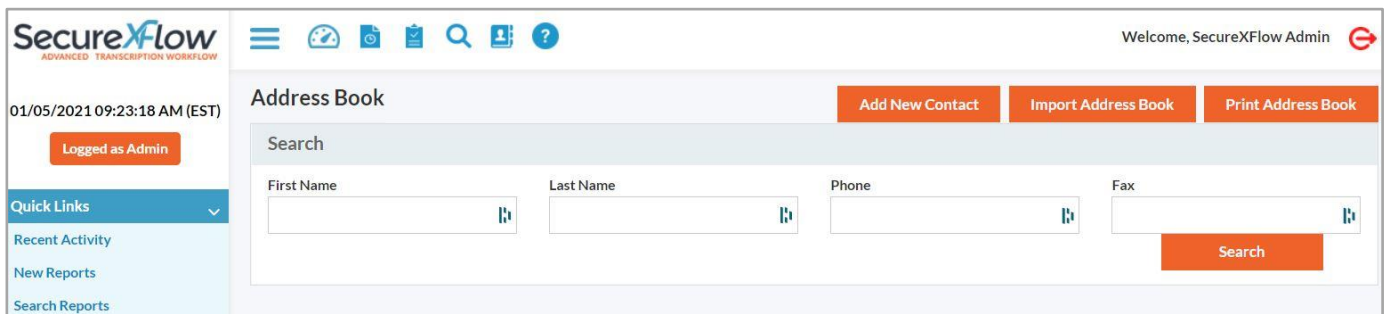
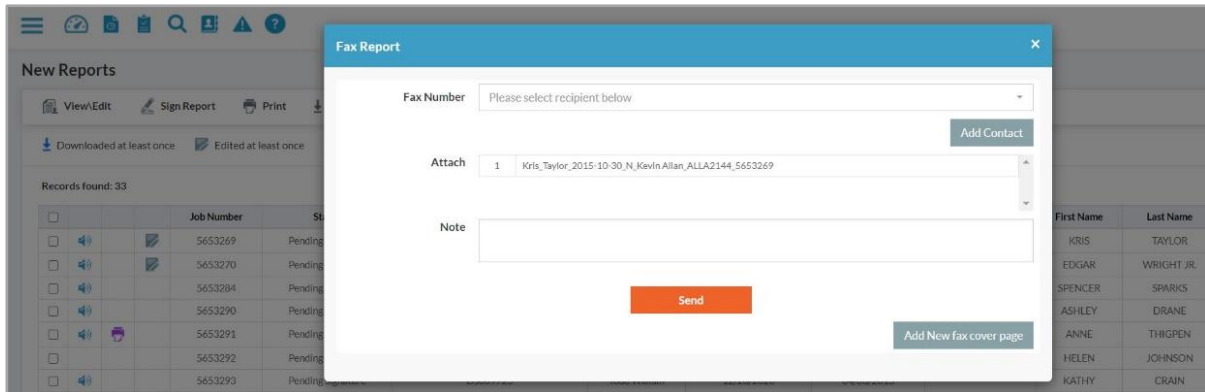
You can also listen to the dictations while viewing the reports or from the list view. Patient demographic information is displayed at the top, just below the menu bar. You can make changes to any patient information that is missing or incorrect. It will automatically get updated in the report as well once the changes are saved.

- **Download (PDF)/Download (DOC):** The link allows users to download a report or multiple report on the local drive as a **pdf** or in **.doc** format.

- **Sign Report** (individually or in bulk): Just check the appropriate box/boxes and click on **Sign Report**.

Once you eSign a report, you will see a confirmation on the screen.

- **Fax/Email:** The link lets users Fax or email reports to practices and contacts. You can create an **Address Book** of your contacts by adding individual names or by importing a list. Names added in the Address Book will show up when you click the **Fax** button. You can contact our Help Desk if you have an Address Book that needs to be imported into **SecureXFlow**. You can change the cover page for faxes as needed. Also, there is an option for comments (**Note**) that sender can add to an outgoing fax.



- To send a secure email with an attached report to a provider, just type in the email address and recipient will receive the email and attachment. The report can be viewed with a Password provided by sender. Password is customizable and can be created/accessed via **User Set up – Preferences** in the navigation Bar.



Please save any edits made before you step aside for another task. You will be logged out after 15 minutes of inactivity even though the screen may not at times display that.

Reports with Exceptions

Any report that is flagged by a transcriptionist for an issue such as demographics data or blanks are found in this link. These need to be filled and corrected. The issue with the report can be seen in the list view in **Comments**. You can:

- View and Edit the report and fix the issues mentioned in **Comments**.
- Click on Process to move the report out of the **Exception** link.

- The report will remain as an Exception until you click on **Process**.

View/Edit Print Process Download (PDF) Download (DOC) Download (ZIP) Fax Email										
Downloaded at least once Edited at least once Printed at least once										
Displaying records 1 to 5 of 5										
<input type="checkbox"/>	Comments	Job Number	Status	Voice Job	Dictator	Date of Dictation	Date of Service	Report Type	First Name	Last Name
<input checked="" type="checkbox"/>	CC / Addressee needs to be verified	7109972	Pending Signature	NAVE0310	Tom Allen	12/24/2020	04/03/2015	Note	GOLDS	EDINBURG
<input type="checkbox"/>	CC / Addressee needs to be verified, CC Unable to Select from Address Book. Check Address, Fax#, Spelling or Duplicates	7576265	Pending Signature	891763	Richard Parker	12/24/2020	07/08/2015	D	RAHIM	RAME

Copy- Paste Reports in the EMR

Many clients use SecueXFlow to view/edit reports and then paste them in the EMR in use at their clinic. Also, Clients can copy and paste reports without doing any edits in SecureXFlow. This can be accomplished as follows:

- In the **New Reports** view, select a report to open and click on **Plain Text View**. This will open the selected report(s) in Plain text view as shown below. User can open one report or multiple reports.

Plain Text View ✕

Reports 1 of 3

PATIENT:
 Patient, Test
SERVISE:
 Testing
PATIENT TYPE:
 Test

- The window that opens is very intuitive with action buttons – **Copy report to clipboard, Complete and Close**. You can copy this report by clicking **Copy report to clipboard** and paste it in the EMR in the appropriate patient record. Once you are done, click on **Complete**. The report will move out of the New Report view and you can go to the next report to copy and paste in the EMR.
- Please note, Reports once copied and pasted in the EMR will move out of New Reports view once you click on Complete. You will also see a validation on the screen – confirming how many reports are **Completed**. The process ensures that user can keep track of reports Pasted/Not Pasted in the EMR.

View/Edit Sign Report Print Download (PDF) Download (DOC) Download (ZIP) Fax Email Plain Text View Complete												
Downloaded at least once Edited at least once Printed at least once												
2 report(s) completed successfully												
Records found: 33												
<input type="checkbox"/>	Job Number	Status	Voice Job	Dictator	Date of Dictation	Date of Service	Report Type	First Name	Last Name	Medical Record Number	Date Of Birth	
<input type="checkbox"/>	10254063	Pending Signature	1233-SU111648	Allen Tom	01/03/2021		Note	TEST	PATIENT			
<input type="checkbox"/>	9590655	Pending Signature	NAVE1234	Allen Tom	01/07/2021	04/02/2019	Note	TEST	JOB			

Search Reports

You can search for any report by clicking on the **Search Reports** icon in the top shortcut menu. You can use multiple search criteria.



Search Reports

Reports are available (archived) online for the agreed contracted

term.

Search Reports

Search **Advanced Search** Configure Columns

Status: Any | Voice Job: | First Name: | Last Name: |

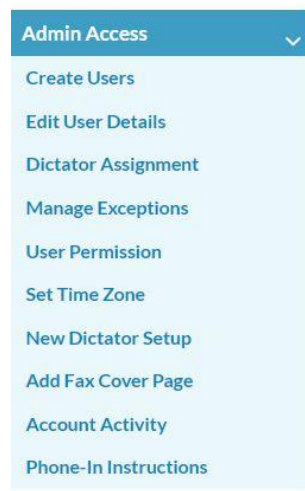
Dictator: Any | Report Type: Any | Date of Dictation: 09/28/2018 - 10/01/2018

Search

Hint: You can use % as a wild card. For example, Ke% for searching all patients beginning with KE.

Other Important Links in the Navigation Bar and their functions

A user can access **SecureXFlow** as an Admin user (Admin access) or non-Admin user (User). The Admin user can access all the buttons in SecureFlow. **Admin Access** link (and its menu items) is only accessible to an Admin user. Typically, there is only one Admin access level user at a center/clinic. However, based on client request, Help Desk will be able to offer your center/clinic more than one Admin user too.



Create Users: Use this link to create a **SecureXFlow** user. Follow on screen prompts and provide Name and Email. Username will always be the email address.

Edit User Details: As the name suggests, use this link to provide specific user details such as role (Physician or staff), e Signature image, etc.

User Permission: The Users at a center or a clinic have different roles and duties. Use this link to identify specific permission levels for staff members such as Edit, Print, eSign, etc.

New Dictator Set Up: This is used for setting up a new provider to dictate in our system and the Admin can provide information, samples and templates for that provider.

Account Activity: The link provides details on Invoicing and billing activity for the current and previous periods.

Add Fax Cov Page: Use this link to add cover pages for a fax that you need to send using **SecureXFlow**.

Set Time Zone: Use this link to set your time zone, i.e., EST, PST, etc.

Phone-in Instructions: For providers using our toll-free system to dictate, phone instructions are available for the SecureXFlow Administrator to be shared with providers.

Customer Care

These links provide access to various training resources including Help Guides, QSGs, software downloads, etc.

Software: Download and install software and/or patches required to use **SecureXFlow** application.

Help Guides: Access Help Guides and Quick Start Guides (QSG) for various products and applications

System Requirements: Provides a summary of PC and network requirements to use SecureXFlow application properly.

Support Policy: Provides information on phone and email support policy.

Logs: This is a HIPAA requirement and lists various links that are basically activity logs for clients. Activities include sending voice files, printing reports, etc. User can view and download activity logs. Examples of Logs are: **User Audit** (who has accessed a report and when), **Report Audit** (Reports downloaded, edited, printed with detailed information).

Customer Care

[Trouble Ticket](#)

[Software](#)

[Help Guides](#)

[System Requirements](#)

[Support Policy](#)

Logs

[View User Audit](#)

[View Report Audit](#)

[View Voice Audit](#)

User Setup

[Edit Profile](#)

[Manage Devices](#)

[Change Password](#)

[Report Name](#)

[Preferences](#)

User Setup on the navigation bar is meant for individual SecureXFlow users and offers the following:

Edit Profile: Use this link to modify your profile in terms of attributes like **Name, Tel number, signature image**, etc.

Manage Devices: The link displays a report on operating system, IP and browser used to access SecureXFlow application.

Change Password: Here, you can change your Password if needed.

The screenshot shows the 'Change Password' form in the MedOfficePro application. The interface includes a sidebar with navigation links: Quick Links, Archive, Exceptions, Visit Management, Logs, Customer Care, User Setup (expanded), Edit Profile, Manage Devices, and Change Password. The main content area displays the 'Change Password' form with three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. A 'Submit' button is located at the bottom right of the form. To the right of the input fields, there is a list of password requirements: 'Password has to meet all the following requirements.' followed by a bulleted list: 'Minimum of 8 characters', 'Combination of letters and numbers', 'At least one Upper case character', 'At least one special character like #,!,@,&', 'Password cannot be same as your last five passwords', and 'Password will be reset every six months.'

Report Name: SecureXFlow offers lots of customization including creating unique report name for downloaded reports. Use this link to decide the order of the attributes such as **Patient First Name, Last Name, MR Number**, etc. and reports will be named accordingly (in the sequence you choose) when downloaded to your PC.

The screenshot shows the 'Report Name' configuration page. At the top left, it displays the date and time '01/05/2021 4:48:07 PM (EST)' and a 'Logged as Admin' button. A sidebar on the left contains a 'Quick Links' menu with items like 'Archive', 'Exceptions', 'Visit Management', 'Logs', 'Customer Care', 'User Setup', 'Edit Profile', 'Manage Devices', 'Change Password', and 'Report Name'. The main content area is titled 'Report Name' and shows the 'Current Report Name' as 'FirstName_LastName_DateOfService_ReportType_DictatorName_Voicejob#'. Below this, a message states 'Report naming is customizable. Please select attributes from the dropdown list to choose Report Name you prefer.' There are three dropdown menus: 'Patient FirstName', 'Patient LastName', and 'Report Type', followed by a 'Select' button. The resulting report name 'FirstName_LastName_ReportType' is shown below. At the bottom of the form are 'Submit' and 'Reset' buttons.

Preferences: The Preference choices will be explained in detail during training and they are specific to each user. If you have any questions while setting your **Preference**, feel free to call our Help Desk to assist you. Choose “**printed at least once**” if you want reports to move out of New Reports after you print them. Similarly, you can select other boxes (**Downloaded at least once, Edited at least once**), depending on the workflow at your facility for Reports to move out of New Reports. Other features under **Preferences** include setting a password that recipients will need when emailing a report and keeping your **Navigation Pane** open.

The screenshot shows the 'Preferences' page in SecureXFlow. The top left shows the date and time '01/05/2021 4:48:42 PM (EST)' and a 'Logged as Admin' button. The sidebar on the left includes 'Quick Links' and 'User Setup' with sub-items like 'Edit Profile', 'Manage Devices', 'Change Password', 'Report Name', 'Preferences', and 'Admin Access'. The main content area is titled 'Preferences' and is divided into three sections: 'EMAIL REPORT' with a 'Password to open report sent via email' field containing 'welcome123'; 'NAVIGATION PANE' with a 'Show Navigation Pane always' checkbox checked; and 'NEW REPORTS SETUP (New reports status excludes reports)' with three checked checkboxes: 'Downloaded at least once', 'Edited at least once', and 'Printed at least once'. There is also an unchecked checkbox for 'Filter by Attending Physician' with an empty text field next to it.

If you have any questions, feel free to reach us at **866-510-1111 ext. 11** or support@medofficepro.com