

QUICK START GUIDE



ADVANCED TRANSCRIPTION WORKFLOW

SecureXFlow is a trusted medical documentation solution for physicians and practices nationwide. The application can be used on any browser and does not require the use of Microsoft Word.

Registration and Login

The login form features the SecureXFlow logo at the top. Below it are two input fields: 'Username' and 'Password', both highlighted in yellow. A blue 'LOGIN' button is positioned below the password field. A link for 'Forgot Username/Password?' is located at the bottom of the form.

Check your email you provided for registration. 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 credentials and security questions. After a successful login, you will be prompted for an authentication code (email or mobile). Please choose to trust your device and browser or you will be prompted for it every time you try to login. You will be prompted to enter an activation code when you try to login from a different browser, PC or IP address. SecureXFlow uses two-factor authentication for better security and HIPAA compliance.

Dashboard

After successful login, you will see a Dashboard with key links to access reports at different levels with ease. **New Reports** link shows you a list of 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 your preferences. You can choose to move them out when you print, 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 **Reports with 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



Quick links for the Navigation bar are at the top of the screen. If you scroll your cursor on the icons, you

will see the purpose of each icon. Click on the three horizontal lines icon to show the entire navigation menu on the left.

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

New Reports

When you click on the New Reports link, you will get a list of reports which you need to print. Most users will select all the reports and print or download them. These reports are deemed by our professional transcriptionists ready for printing. You can not only print and download these reports from this link but you

New Reports

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

Records found: 44

<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"/>	9295023	Pending Signature	WHIT0003	White John	01/10/2021	08/13/2018	Note	XAVIER	CASTILLO	4598085	12/31/1969
<input type="checkbox"/>	5653311	Pending Signature	DS004681	Todd William	01/01/2021	04/08/2013		WILLIAMS	OWEN	5412525	

can also electronically Sign, Fax or Email these reports. You can also listen to the dictations while viewing the reports or from the list view. To View a report, you need to select the check box on the left and then click on View/Edit in the menu. You can select multiple reports to view at the same time. When you close one report, you will see the next report you have selected. Once you make any **Edit** in the report, do not forget to **Save** it.

Copying and Pasting 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 in the EMR 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 in Plain text view as shown below.

Plain Text View

Reports 1 of 1

Patient Name: Testing Smith Gender: F DOB: 12/12/1989 Surgery: 04/22/2018

Chief Complaint / Indication for Planned Procedure

This is a test for Zabinski H&P

Past Medical, Social, & Family History (Smoker, ETOH, Drug Use)

Copy report to clipboard Complete Close

- 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 as needed.
- Further, user can select and open multiple reports from New Reports window and follow the same process. Reports once copied and pasted in the EMR will move out of New Reports view once you click on Complete. This can be done sequentially when multiple reports are open in **Plain Text View**.

Reports with Exceptions

Any report that is flagged by our transcriptionist for any issue such as demographics data or blanks are found in this link. These need to be edited and corrected. The issue with the report can be seen in the list view in Comments. Click on **Process** to move the report out of the exception link.

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

Patient demographic information is displayed at the top, just below the menu bar. You can make changes to the patient information in case it is incorrect. It will automatically get updated in the report as well once the changes are saved.

The screenshot shows a patient record interface. At the top, there are four input fields for patient information: First Name (Douglas), Last Name (Wings), Medical Record Number (12345), and Date of Service (12/12/2016). Below these fields is a toolbar with icons for eSign, Edit, Print, Download (PDF), Download (DOC), Fax, Email, and Close. A status bar indicates the user is JOHN WHITE, MD, viewing a NOTE for patient WHIT3171, with a medical record number of 5653156 and a date of 09/27/2018. The patient information is repeated below the toolbar. The main content area displays a medical history report titled "HISTORY AND PHYSICAL".

HISTORY AND PHYSICAL

PATIENT: Doug Wing
 # 95516
 DATE OF ADMISSION: 04/08/2013
 DICTATED BY: John White

HISTORY OF PRESENT ILLNESS: Doug Wing is a 60-year-old right-hand-dominant male with a past medical history significant for GERD and hypertension who had 6 weeks of left elbow pain. He does report a history of trauma about 6 years ago when he slipped and fell on some ice and hit his left elbow and right elbow and developed olecranon bursitis. Right elbow seemed to heal. The left elbow seemed to have sensitivity with a full feeling in the back of his left elbow. In January 2013, he was starting to do some work outside home. He was doing curls and pull-ups. He developed pain over the lateral aspect of his elbow. He has had difficulty with straight arm extension. The elbow is aggravated with straight arm lifting. He has been referred to Trenton Orthopaedic Group for orthopedic hand surgical opinion, consultation, and care.

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. Reports are available online for the agreed contracted term.



The screenshot shows the "Search Reports" interface. It has a "Search" tab and an "Advanced Search" button. The search criteria are organized into two rows. The first row includes "Status" (Any), "Voice Job" (text input), "First Name" (text input), and "Last Name" (text input). The second row includes "Dictator" (Any), "Report Type" (Any), and "Date of Dictation" (09/28/2018 to 10/01/2018). A "Search" button is located at the bottom right of the search area.

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

Note: 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

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