Spectrum Secure Delivery

User Guide

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Contents

Introduction 1

For More Information 1

Installing the App 2

Installing and Running the App on a Mobile Device 2

Android Phones and Tablets 2

Apple iOS Phones and Tablets 3

Other Phones and Tablets 3

Running the App from a Desktop Browser 4

Logging In 5

Client ID and Password 5

Auto-Logoff Options 5

Manually Logging Off 6

Messages and Notes 7

Overview 7

Notification of New Messages and Notes 7

Organizing and Handling Messages 8

Message Lists 8

Viewing an Individual Message 8

Replying to a Message 9

Forwarding a Message 10

Handling Notes 11

Exchanging Notes within a Group 11
Creating a Note 11
Commenting on a Note 12
Adding to a Note 13
Deleting a Note that you Created 13
Hiding Notes that you have Read 13
Options 14
Pre-Set Replies 14
Completed Messages 15
Notes 15
Auto-Log Off 15
App and Device Info 15
Registration Status 15
Manual Log Off 15
Appendix 16
Connecting to a New Server 16
Use of the Back Button in Android 16

Introduction

The **Spectrum Secure Delivery** App allows you to access your answering service or call center messages securely and efficiently on your smartphone and tablet devices. In addition, it provides a way to communicate securely with your associates who are also running the Spectrum Secure Delivery App.

When your answering service has a message for you, a notification will be sent to your device. The notification ***may*** optionally contain parts of the message that are not subject to privacy restrictions. To view the full message, you open the Secure Delivery App and login to the answering service.

To ensure conformance to security standards set forth by the HITECH Act of 2009, all communication between the App and the server at your answering service is encrypted. The messages themselves are not physically stored on your device.

From within the App, you can optionally mark a message as 'In-Process' or 'Completed' (more on this later). You can also send a reply to the answering service if further action on a message is required on their part; otherwise, no further interaction with the service is necessary. The App also allows you to forward the message within a 'Note' to one or more of your associates.

'Notes' are the name given to text messages that you exchange with your associates who also use the Secure Delivery App. This communication is also encrypted and conforms to the same security standards as your answering service messages.

The Spectrum Secure Delivery App has an 'Options' section that allows you to customize certain behavior of the app. Within the 'Options' section you can pre-set short phrases for use in replies or notes, thus saving time when processing messages and communicating with associates. You can also control how long completed messages and notes remain viewable , as well as the auto-logoff settings.

This guide takes you through the steps of installing and running the App on your smartphone or tablet. The App can be downloaded to Apple and Android devices from their respective online stores, and can be used on other devices, such as a Windows 8 phone, by accessing it through the phone's Web browser. The Secure Delivery App can also be run on a desktop computer using a web browser such as Internet Explorer, Firefox, Chrome and Safari.

For More Information

If you have any questions regarding the installation and use of the Spectrum Secure Delivery App, please contact your Answering Service Customer Service Department.

Installing the App

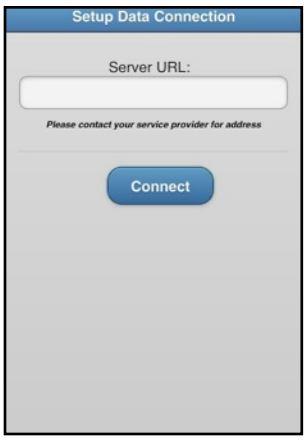
The Secure Delivery App has been designed to work on the latest smartphones and tablets, as well as in a desktop web browser.

Installing and Running the App on a Mobile Device

The Secure Delivery App is available as a native app for Android and Apple smart phones and tablets. It can be accessed on other smart phones and tablets using the Browser app on the device.

Android Phones and Tablets

To install the Secure Delivery App on an Android device, activate the Google Play Store app. Go to the 'App' section and search for either 'Spectrum Secure Delivery' or 'Amtelco'. In the Amtelco section, Spectrum Secure Delivery will be listed with other Amtelco apps. Select **Spectrum Secure Delivery.** Tap on 'INSTALL' to initiate the download. Then tap on 'OPEN' to run the app.



The first time Spectrum Secure Delivery is opened, it will display the 'Setup Data Connection' screen. Enter the 'Server URL' using the information provided by your answering service. The URL will be something like the following:

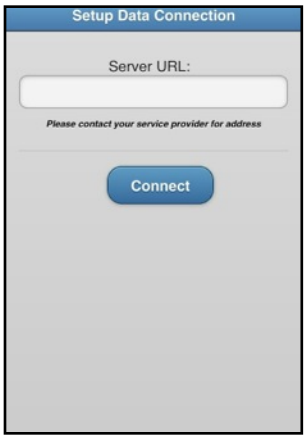
https://myservice.com

This URL is used by the app to connect to your answering service. Note that there are no spaces in the URL, and that the actual entry you make will vary depending on your answering service.

After entering the URL, tap on the 'Connect' button. If the URL has been entered correctly, the app will then show the 'Login' screen. See the following section ('Logging In') for instructions on how to proceed to login and access messages and notes.

Apple iOS Phones and Tablets

To install the Secure Delivery App on an Apple iOS device, go to the App Store and search for either 'Spectrum Secure Delivery' or 'Amtelco'. In the Amtelco section, **Spectrum Secure Delivery** will be listed along with other Amtelco apps. Tap on the download button to install the app.



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After entering the URL, tap on the 'Connect' button. If the URL has been entered correctly, the app will then show the 'Login' screen. See the following section ('Logging In') for instructions on how to proceed to login and access messages and notes.

NOTE: When prompted to 'Allow Push Notifications', press 'Ok'. If you happen to press "Don't Allow", you may later go the Notifications Center and enable them for Spectrum SD.

Other Phones and Tablets

Spectrum Secure Delivery can be run on other devices that support the most recent browser technology (often referred to as 'HTML5'). To do so, activate a browser on the phone or tablet, and enter the URL provided by your answering service. This is the same URL referred to above for use with the native app. Enter the URL as if it were a web page that you wanted to access. Doing so will initiate a download of Spectrum Secure Delivery as a 'Web App'.

A 'Refreshing' screen will be displayed briefly, followed by the 'Login' screen. At this point, you can optionally save a link to the Secure Delivery 'Web App' by tapping on the appropriate button in the browser. After the link is saved on the home page of the device, you can access the 'Web App' version by tapping on the home screen icon for Secure Delivery.

Running the App from a Desktop Browser

Spectrum Secure Delivery can be run in a desktop browser that supports the most recent web technologies. These include Internet Explorer, Chrome, Firefox, Safari and Opera. It is recommended that you update to the latest available version of the browser.

To access Spectrum Secure Delivery, activate the browser and enter the URL provided by your answering service. This is the same URL referred to above for use with the native phone app and phone browser. For example,

https://myservice.com

This URL is used by the app to connect to your answering service. Note that there are no spaces in the URL, and that the actual entry you make will vary depending on your answering service.

Enter the URL as if it were a web page that you wanted to access. Doing so will initiate a download of Spectrum Secure Delivery as a 'Web App'.

After the URL is entered and the 'Web App' is downloaded, a 'Refreshing' screen will be displayed briefly, followed by the 'Login' screen. At this point, you can optionally save a link to the Secure Delivery 'Web App' by clicking on the appropriate button in the browser, typically a 'Bookmark' button.

The primary difference between running Secure Delivery from a Desktop Browser and running it as an App on a phone, is the ability for your answering service to notify you of the availability of a message from within the Secure Delivery App.

- With a mobile device, the notification of a waiting message will be sent directly to the device, and the App can be activated as a result.
- When using a desktop browser, new Messages or Notes are revealed by manually refreshing the screen. This is done by clicking on one of the buttons across the bottom of the app ('New', 'In-Process', 'Complete' or 'Notes').

Your answering service can offer you alternatives for notification when running on a Desktop Browser. These include Email, Alpha Pager and SMS text message.

Logging In

After downloading the App and successfully connecting to your answering service by entering the Server URL, the ‘Login’ screen will be presented.

Client ID and Password

Each user of Spectrum Secure Delivery is assigned a unique ‘Client ID’ and a ‘Password’. Your answering service will provide them to you.

When entering these fields, the ‘**Password**’ is **case-sensitive**, meaning that capitalization is important. The ‘**Client ID**’ on the other hand, is **not case-sensitive**.

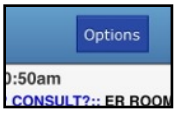
After entering these fields, tap on the ‘Submit’ button. The app will confirm your correct ‘Client ID’ and ‘Password’ with the server at the answering service, and proceed to the screen showing a list of ‘New’ messages.

At this point, having confirmed your login information, you will not need to re-enter the ‘Client ID’ in the future when given the login screen. It will be entered for you as a default. You will, however, need to re-enter your password.

If either the ‘ClientID’ or ‘Password’ has been entered in error, a pop-up alert will be displayed, as illustrated at right. Tap ‘OK’ and re-enter the information.

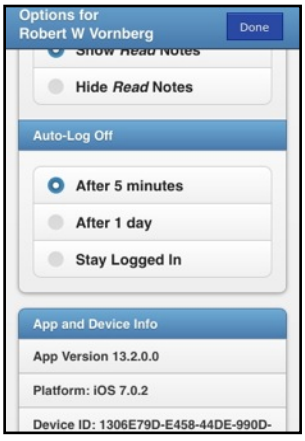
Auto-Logoff Options

Spectrum Secure Delivery provides several options for auto-logging off from the answering service server. This would be done after a specified period of ‘no activity’ within the Secure Delivery App.



The ‘Options’ page is accessed by tapping the ‘Options’ button in the upper right corner, which is visible when viewing a list of Messages or Notes.

The Auto-Logoff options are ‘After 5 minutes’, ‘After 1 day’, and ‘Stay logged In’.

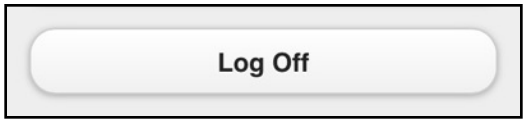


Manually Logging Off

At any time, you can manually log off the Secure Delivery App.

This is done by accessing the ‘Options’ page and then scrolling down to the bottom. There you will find the ‘Log Off’ button.

Tap on it to log off. The ‘Login’ screen will then re-appear.



Messages and Notes

Overview

Spectrum Secure Delivery is designed to let you view your answering service messages in a manner that conforms to the latest security standards. These standards have come about primarily to protect the privacy of patient health information and similar sensitive information depending on your industry, ie. banking. Traditional means for viewing messages, such as alpha pagers, email or SMS are not considered secure by these new standards.

Fortunately, due to advances in networking and mobile device technology, new software applications such as Spectrum Secure Delivery make it possible for you to have instant access to your full messages in a manner compliant with these standards.

Spectrum Secure Delivery lets you manage two kinds of information:

1. **Messages**, which are created by your answering service;
2. and **Notes**, which are short text messages that you create and exchange with associates that are also using the Spectrum Secure Delivery App.

When a new Message or Note is available via Secure Delivery, a notification is sent to you. The notification ***may*** possibly contain parts of the message which are not restricted for privacy reasons.

Notification of New Messages and Notes

Four methods of notification are possible, and they may be used in combination, based on your arrangement with the answering service.

They are:

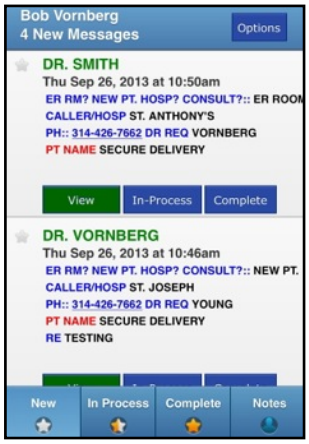
- **Native** (Apple and Android phones and tablets)
- **SMS**
- **Email**
- **Alpha Page**

Native notification is a mechanism built into the operating system of your phone or tablet. This type of notification is available for the Android and Apple versions installed from their respective online store, and it allows the Secure Delivery App to be activated automatically when you respond to the notification. At the discretion of you and the answering service, the content of the notification ***may*** contain non-PHI fields from the message.

SMS, **Email** and **Alpha Page** are traditional methods for sending a message, but when used for notification of a new or waiting message, their content is restricted to non-PHI fields from the message. In each case, such a notification signals either the availability of a new message from the answering service or a Note from one of your associates.

Organizing and Handling Messages

The Secure Delivery App gives you a way to manage the 'work flow' of your messages from the answering service. Use of this workflow is optional, but can be used to implicitly communicate the status of a message back to the answering service.



Message Lists

The Secure Delivery App considers a message to be in one of three possible states.

- New
- In-Process
- Complete

In the screenshot at the right, the **New** list is being displayed. Notice that the 'New' button is highlighted at the bottom.

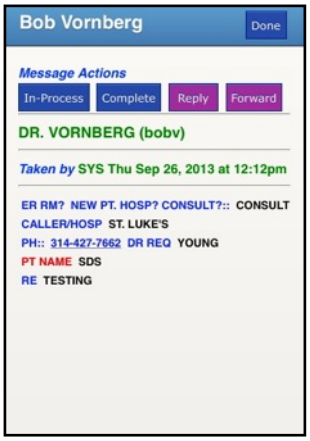
When a message is created at the answering service and posted for Secure Delivery, it is considered at that time to be **New** from the perspective of the Secure Delivery App. You, as the user, have the option of moving it to the **In-Process** state or the **Completed** state. This can be done while looking at the previewed messages in a list by tapping the blue **In-Process** or **Complete** button associated with the message. The message will be removed from its current list and moved to the designated list.

To show the list of **In-Process** or **Complete** messages, tap on the respective button at the bottom of the screen.

Viewing an Individual Message

When viewed in a list, messages are shown in a 'preview' mode, even though they actually show a significant portion of the message. To view the full message, tap on the green **View** button associated with the message. This will show the entire message and also provide buttons to move the message to the **In-Process** or the **Complete** list.

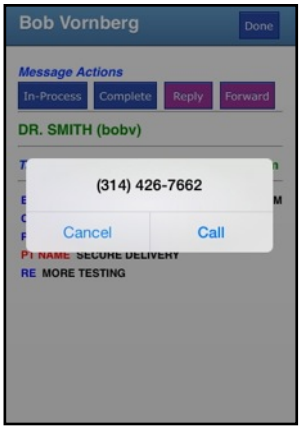
If moved to a different list, the button changes, giving you the option to move it back. See example at left.



Buttons are also provided that allow you to send a **Reply** to the answering service for the selected message, or to **Forward** it within a Note to one or more associates.

- A **Reply** to a **Message** is sent to an operator at the answering service
- A **Note** containing a **Forwarded Message** is sent to one or more selected associates.

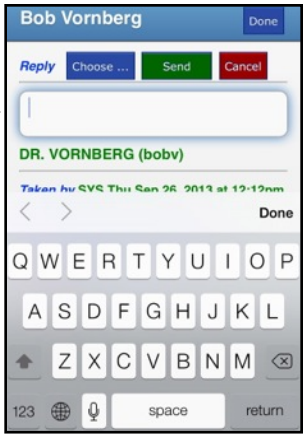
Phone numbers that appear in a message on a mobile phone can be dialed if they appear with underscores. Tap on a phone number to initiate the dialing. A pop-up will ask you to confirm the number that you want to dial.

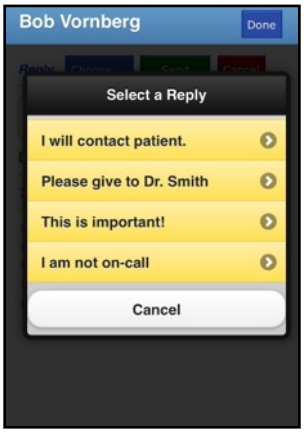


Depicted is a representative example from an iPhone.

Replying to a Message

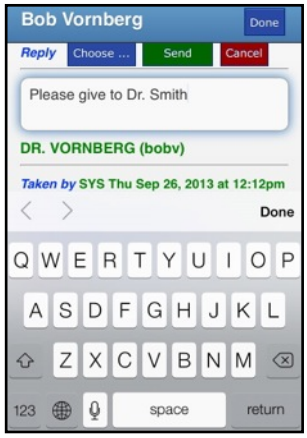
A **Reply** is created by typing in the text area provided by the app above the message after the **Reply** button is tapped.





If any pre-set replies have been created, a **Choose** button will be available. If tapped, the list of pre-set replies will be shown in an overlay, as depicted in the example at left.

By tapping on one of the replies, it will be automatically transferred to the text area. You may optionally add to it by continuing to type in the area.



Pre-set replies are created through the Options screen and are described later in this guide.

If you go back and choose a different pre-set reply, the text area will be cleared and the new pre-set reply will be inserted.

When finished composing the reply, tap on the **Send** button to initiate its transmission to the answering service.

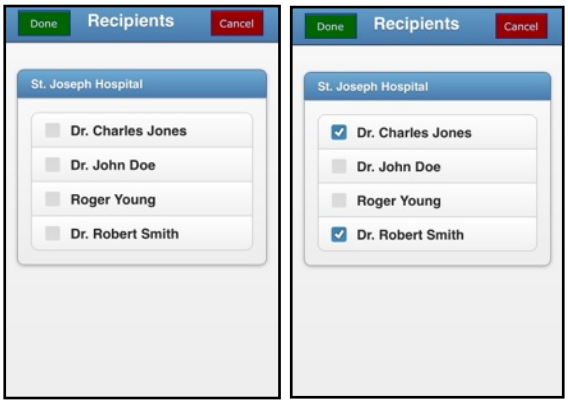
A **Reply** is always associated with a particular message and will be presented to an operator at the answering service at their agent station in the context of the original message. It is presumed the operator will take any follow-up action directed by the content of the reply. More than one reply is allowed to any particular message. When a message is viewed in its entirety, it will contain all replies that have been sent to the answering service.

Forwarding a Message

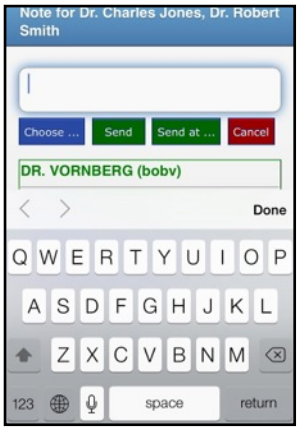
Forwarding a message allows you to send it as a **Note** to an associate with whom you share membership in a **Group.** Groups are described in the following section on **Handling Notes**.

Forwarding is initiated by tapping the **Forward** button while viewing the message. A dialog similar to a Reply is started, allowing you to type in a short text message or imbed a pre-set reply.

Prior to that, however, you are asked to select one or more **Recipients** for the Note. Possible recipients are listed in their respective group, each being a user of the Secure Delivery App that has been placed in the group with you. The example at right shows only one group, but more groups are allowed if defined for you.



Tap on the corresponding checkbox to select a recipient. Tap again to un-select. Tap on the group name to select or un-select the entire group. When all desired recipients are checked, tap on the green **Done** button. Tapping on the red **Cancel** button will cancel the forwarding.

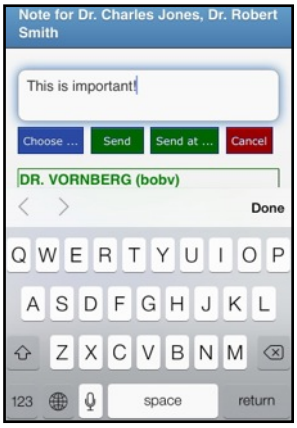


After the desired recipients are selected, a text box appears above the message. You can **Choose** from pre-set replies to populate the text of the Note, or you can type the text in directly.

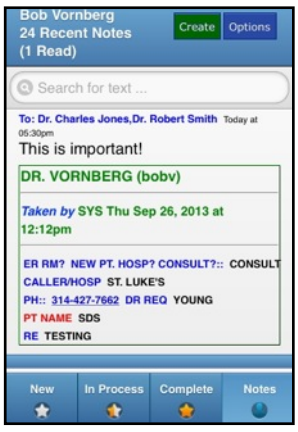
When the text of the Note is complete, you have two options to send it.

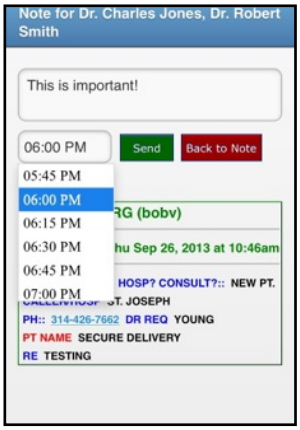
The first green **Send** button will post the Note and notify the recipients immediately.

The second green **Send at** button will post the Note, but not notify the recipients until the time selected from a drop list. The available scheduled times are in 15 minute increments and are assumed to be over the next 24 hours.



In both cases, the message will be imbedded in the **Note**, following the text (if any) that was entered, and will be shown at the top of the list of Notes.
See the example in the screenshot at left.

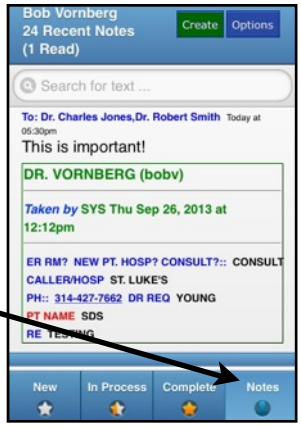




Handling Notes

A **Note** is a short text message that you create and send to one or more associates. The term 'associate', as used here, is another user of the Spectrum Secure Delivery App that has been placed in a **Group** with you and possibly other users who have a need to share messages securely. For example, a set of doctors and nurses that need to share patient information can be placed in a group.

Exchanging Notes within a Group

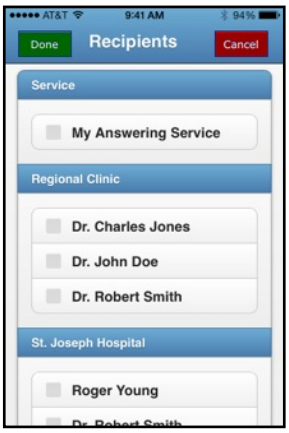


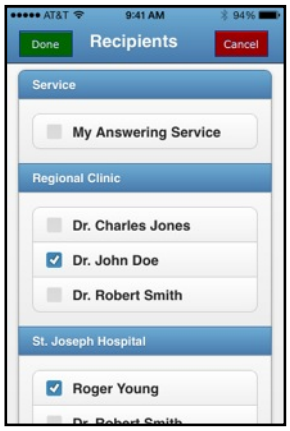
Groups are created by the answering service. Any particular user can be a member of more than one group.

Creating a Note

To create a **Note**, tap on the 'Notes' button in the lower tool bar. Doing so will cause the current list of viewable Notes to be displayed.

With the **Notes** list displayed, tap on the **Create** button at the right in the upper tool bar.



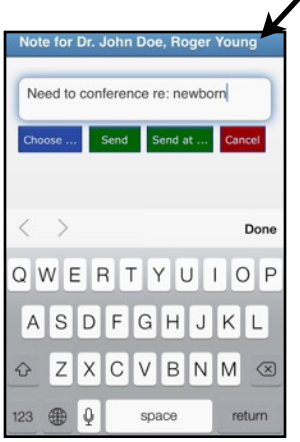


After the **Create** button is tapped, a list of possible recipients will be displayed. They are organized and listed within their respective **Group.** It is possible for a recipient to be shown in more than one group.

At the top of the list is the pseudo-group **Service** containing the answering service.

Tap on a recipient's checkbox to enable them. Tap again to disable. Tap on the group name to enable or disable the entire group. When all desired recipients are checked, tap the **Done** button in the upper toolbar to continue. Tapping the **Cancel** button in the upper toolbar will cancel the Note creation sequence.

After tapping **Done**, the text entry screen will be displayed. The list of recipients will be displayed at the top.

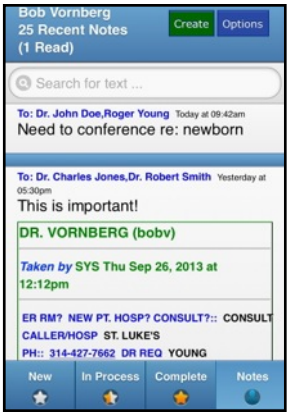


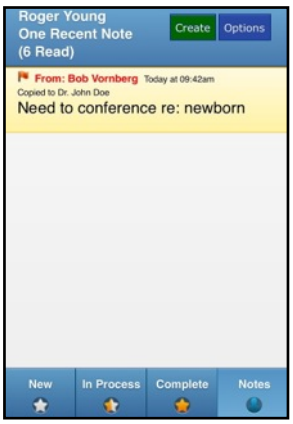
You can **Choose** from pre-set replies to populate the text of the Note, or you can type the text in directly.

When the text of the Note is complete, you have two options to send it.

The first green **Send** button will post the Note and notify the recipients immediately. The new **Note** will be shown at the top of the list of Notes.

The second green **Send at** button will post the Note, but not notify the recipients until the time selected from a drop list. The available scheduled times are in 15 minute increments and are assumed to be over the next 24 hours.





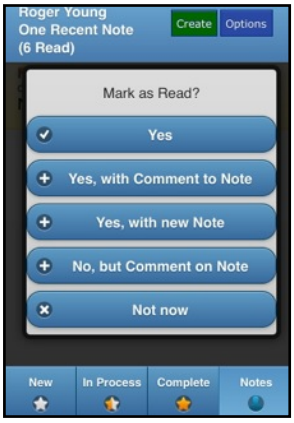
A Note that you have *sent* is displayed with a white background. A Note that has been *sent to you* is displayed with a tan background.

The screenshot at left shows the Note of the previous example, as it would look to one of the recipients.

The **Flag** symbol to the left of the sender indicates that this Note has not been marked as 'Read'.

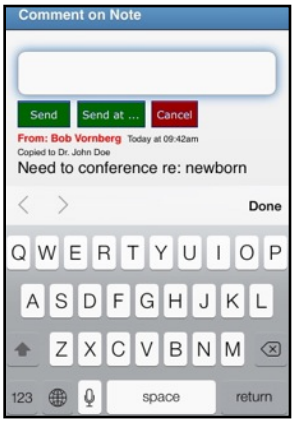
Commenting on a Note

You can send a response to a Note that you have received. This is referred to as **Commenting** on a Note. To do this, tap on the body of the Note.



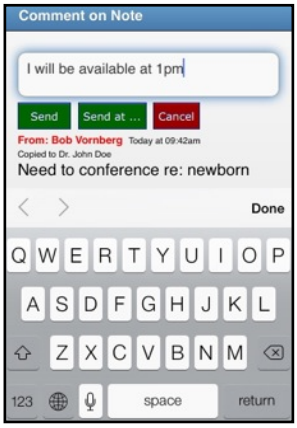
A list of options is presented that allow you to simply mark the Note as 'read', mark it as 'read' and add a **Comment,** mark it as 'read' and start a new Note, or **Comment** on the Note but do not mark it as 'read'.

Tapping on 'Not now' takes no action and returns to the list of Notes.



If either 'Yes, with Comment to Note' or 'No, but Comment on Note' is chosen, a text window will appear, as in the screenshot at left. (This particular user does not have any pre-set replies defined, so the **Choose** button does not appear.)

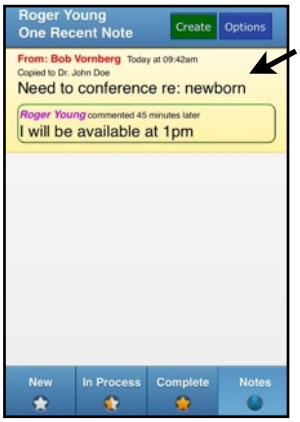
The original Note is displayed beneath the action buttons.



Compose the **Comment** by typing in the text area.

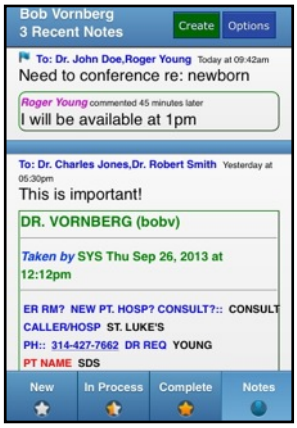
Tap on **Send** to post the **Comment** to the Note and notify all the other recipients immediately.

Or tap on **Send at** to post the **Comment** and notify the recipients at a designated scheduled time within the next 24 hours.

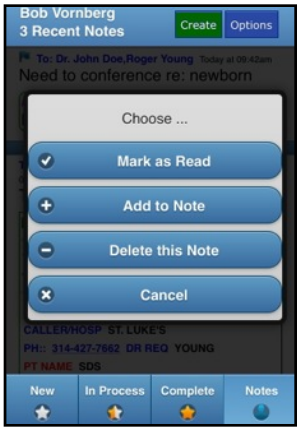


The Note will appear to the commenting user in tan, as depicted at the left, because the original Note was sent by another user. Comments to Notes are kept together with the original Note.

The Note will appear to the original sender in white, and will be moved to the top of the list, because it has been updated most recently.



Adding to a Note



Adding to a Note is very similar to commenting on a Note. The primary difference is based on who sent the original Note.

- You *Add* to Notes that you originated.
- You *Comment* on Notes that were originated by another user.

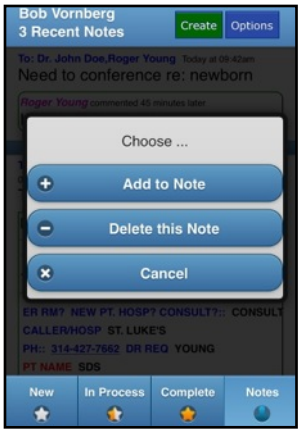
To **Add** to a Note that you originated, tap on the body of the Note. The menu depicted at right will appear. Tap on 'Add to Note' to continue.

Compose the addition to the Note by typing in the text area.

Tap on **Send** to post the **Addition** to the Note and notify all the other recipients immediately.

Or tap on **Send at** to post the **Addition** and notify the recipients at a designated scheduled time within the next 24 hours.

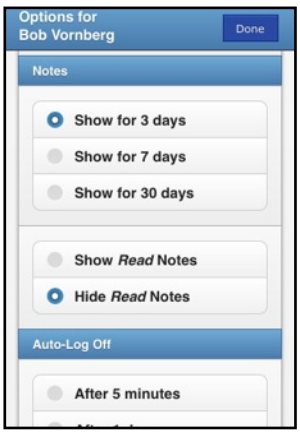
Deleting a Note that you Created



You can delete a Note that you originated. To do this, tap on the Note when viewing it in the 'Notes' list. A menu will appear with 'Delete this Note' as one of the options.

If you tap on 'Delete this Note', the selected Note will be marked as 'Deleted' and will no longer be displayed. Nor will any of the recipients be able to view the Note.

Hiding Notes that you have Read



You can hide Notes originated by other users that you have marked as 'read'. To enable this mode of operation, go to the 'Options' page, scroll down and select the 'Hide *Read* Notes' option.

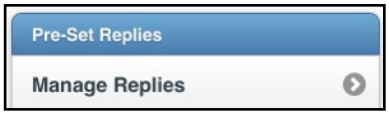
Options

The **Options** page allows you to personalize the behavior of parts of the Secure Delivery App. The Options page is accessed by tapping the **Options** button in the upper right corner of the screen. It is available when viewing a list of messages or Notes.

Pre-Set Replies

Pre-Set Replies are a time saver when sending a commonly used response to a message or Note.

On the Options page, there is a section for **Pre-Set Replies**. To create and manage your replies, tap on **Manage Replies**.

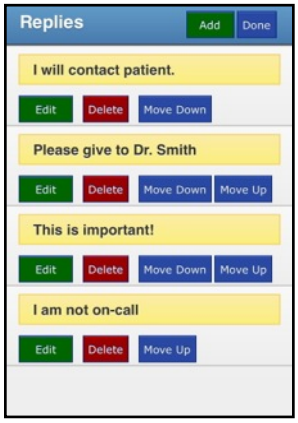


The first time into this page, the list of Replies will be empty.

Tap on the **Add** button to create one.

A text box will appear, into which you can type a phrase or sentence. The text box will automatically expand to accept longer entries.

Tap the **Save** button to save the new reply in your list.



The screenshot at right shows a list of four replies. You can control the order in which the replies appear by using the **Move Up** and **Move Down** buttons.

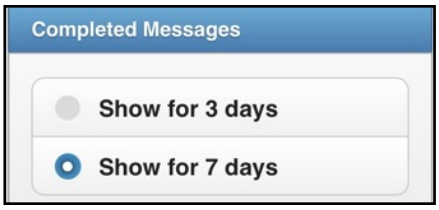
You can change a reply by tapping the **Edit** button.

The **Delete** button will remove the associated reply from the list.

Tap the **Done** button in the upper right when finished.

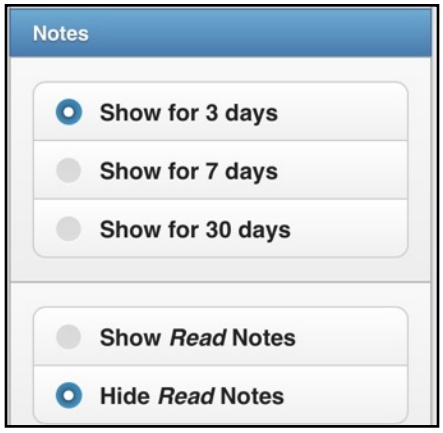
Later, when entering a Reply or Note, a **Choose** button will be available for choosing one of the **Pre-Set Replies**.

Completed Messages



You have two options for controlling how long a **Completed** message will appear, based on its age: either 3 days or 7 days.

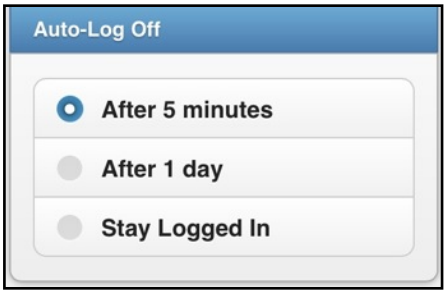
Notes



There are three options for controlling how long a Note will appear, based on its age: 3 days, 7 days, or 30 days.

Notes more recent than the specified limit that have been marked as 'Read' can be hidden by selecting the **Hide *Read* Notes** option.

Auto-Log Off



There are several options for auto-logging off from the answering service server after a specified period of 'no activity' within the Secure Delivery App.

The options are 'After 5 minutes', 'After 1 day', and 'Stay logged In'.

App and Device Info

This section shows information about the installed version of the App, the device operating system and the Device ID.

Registration Status

If the App has been installed from the Google or Apple online store, this section will indicate whether of not the app has successfully registered itself with the native notification service.

Manual Log Off

At the bottom of the **Options** page is a button that allows you to manually log off. Tap it to return to the **Login** screen.

Appendix

Connecting to a New Server

When the Secure Delivery App is installed on an Android or Apple phone or tablet, the first step after installing the app is to set up the data connection by entering the URL for the server at the answering service. Once entered, the **Setup Data Connection** screen is never redisplayed again as part of normal operation of the app.

If it becomes necessary to connect to a different answering service server, the URL can be re-entered by taking the following steps:

1. Log off the app by going to **Options** and tapping the 'Log Off' button. The **Login** screen will be displayed.
2. At the **Login** screen, clear both the 'Client ID' field and the 'Password' field, and then tap the 'Submit' button.
3. The **Setup Data Connection** screen will be re-displayed. At this point, you can enter a new server URL.

Use of the Back Button in Android

When using the Secure Delivery App on an Android device, the 'Back' button will be interpreted by the app to mean 'go to the previous page'. For instance, if you are viewing a message, the 'Back' button will take you to the list of messages that contains it.

If you are viewing a list of messages or Notes, the 'Back' button will log off and take you to the 'Login' screen.

If you want to exit the App, but stay logged on, tap the 'Home' button.