

# SECURE RECORDS SOLUTIONS

---

REQUEST A FILE  
ONLINE STEPS

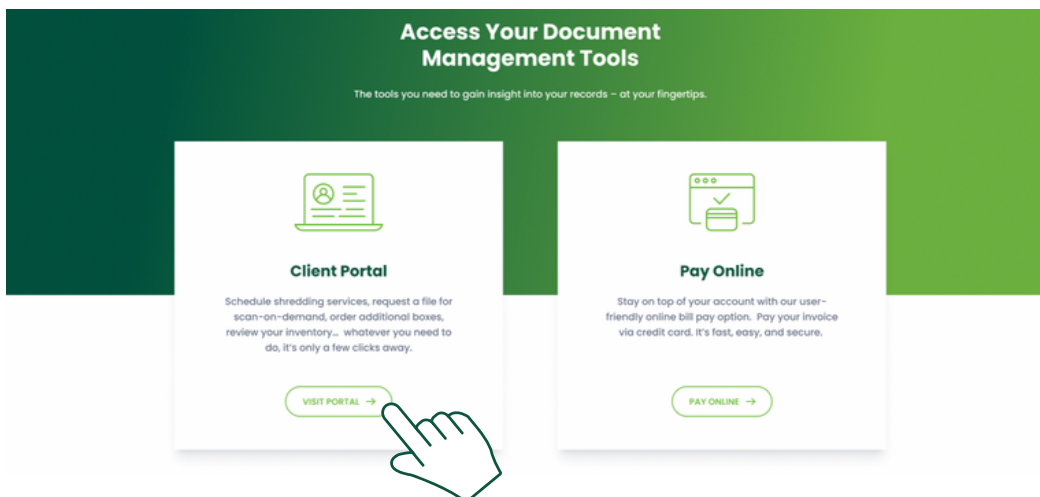


# STEPS TO REQUEST A FILE

1. Visit [www.securerecordssolutions.com](http://www.securerecordssolutions.com) and click on "CLIENTS" in top menu or visit [www.securerecordssolutions.com/clients](http://www.securerecordssolutions.com/clients) to access the clients page directly.



2. From the Client Page ([www.securerecordssolutions.com/clients](http://www.securerecordssolutions.com/clients)), click on the "VISIT PORTAL" button on the lefthand side of the page. Login using your username and password.



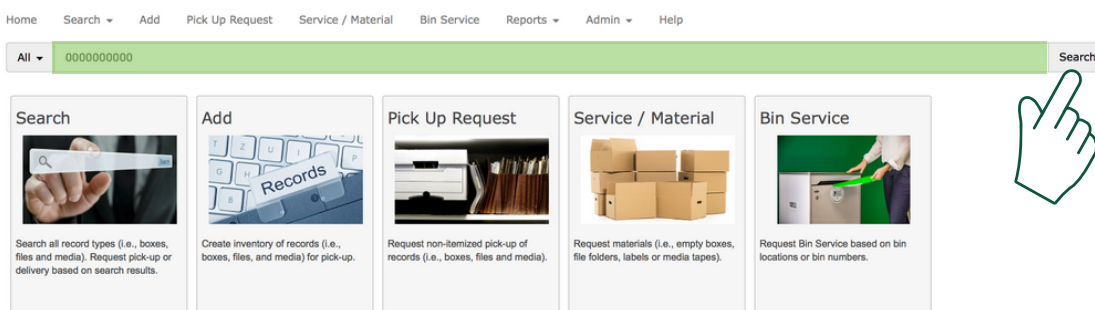
3. Search by barcode number, short description, or any of the index criteria originally designated with the SRS team as part of your Scope of Work.

Examples by record type include:

Human Resources: Last Name, First Name

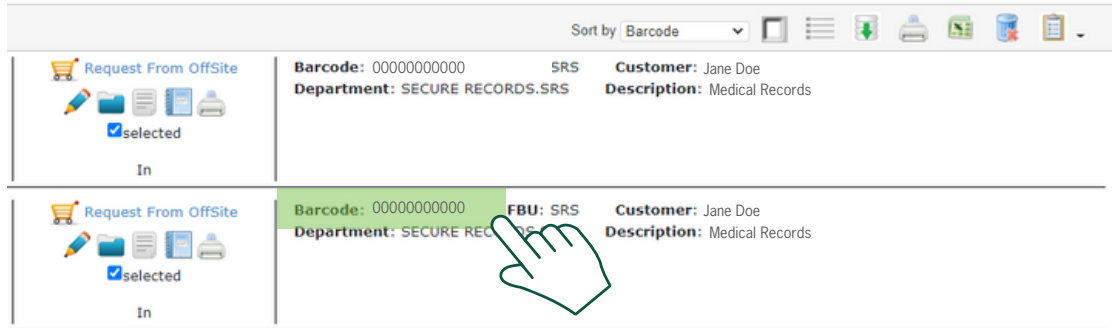
Medical Records: Last Name, First Name, Medical Record Number or Date of Birth.

Accounting: Item and Date Range i.e. "Invoices June - October 2018"

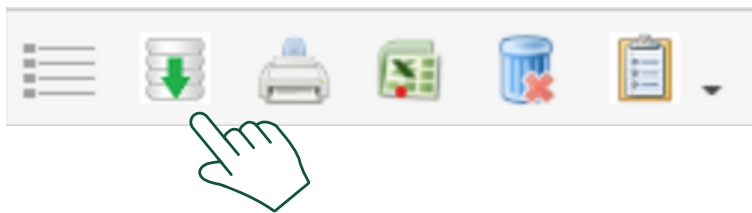


# STEPS TO REQUEST A FILE

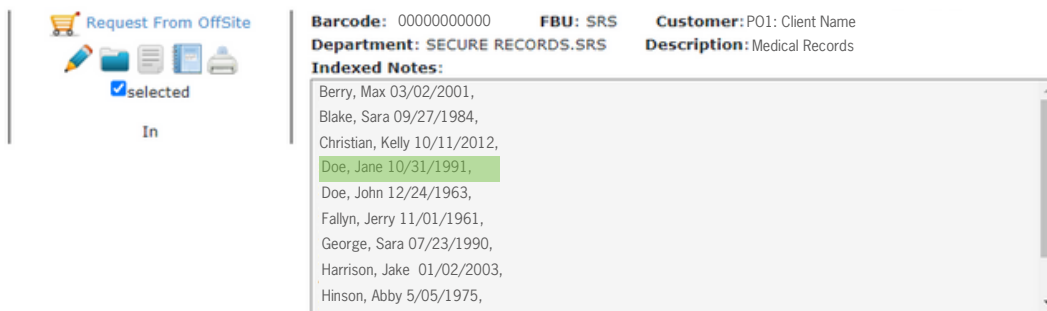
4. The portal will give you a list of boxes and files containing your search criteria.



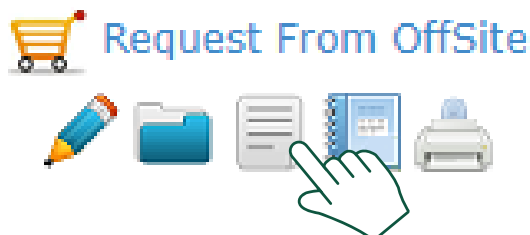
5. Click the Item Index icon in top right corner of screen.



6. Search the list of boxes and confirm the file you want and which box it is in.



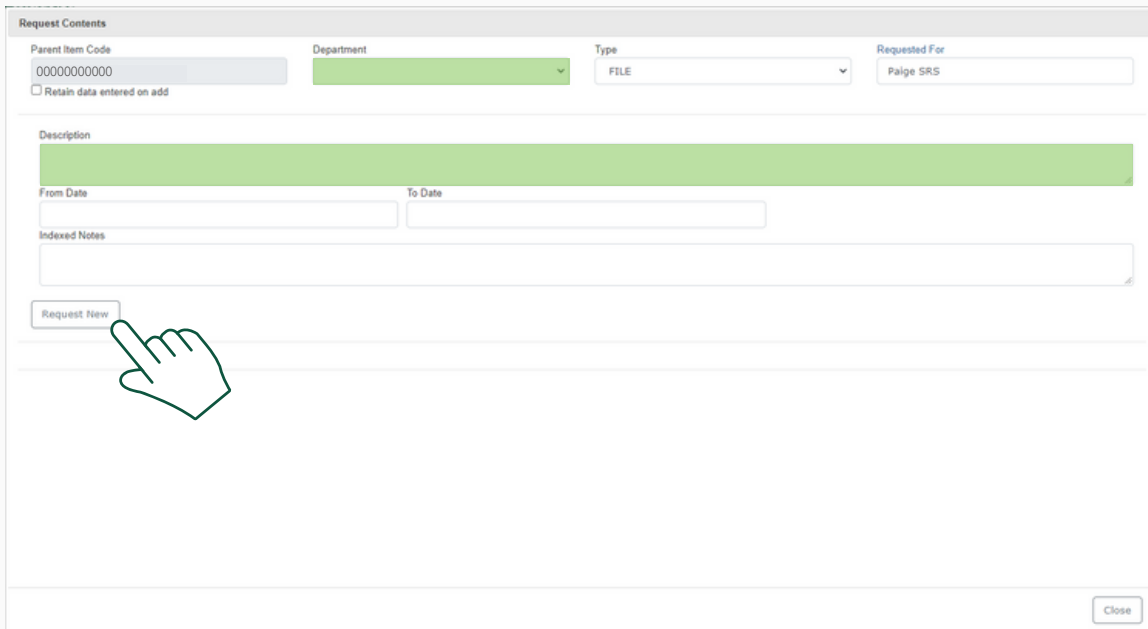
7. Click the gray Paper Icon to the left of the box you need.



# STEPS TO REQUEST A FILE

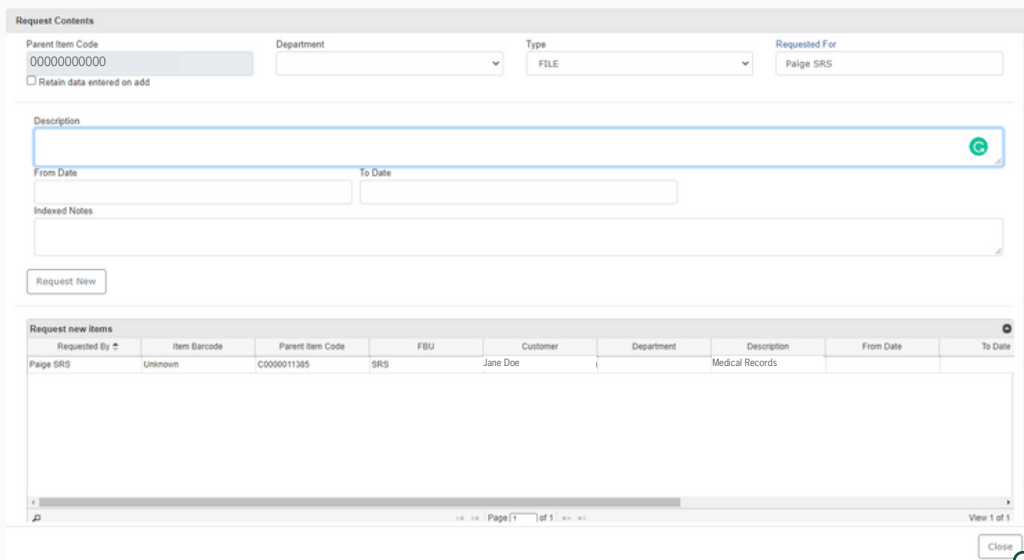
## 8. Fill in the Department.

For "Description", include details about the information you are looking for.  
For Example – Last Name, First Name, DOB, Patient#, or other search term.  
Then click "Request New".



The screenshot shows the 'Request Contents' form. The 'Parent Item Code' is 0000000000. The 'Department' dropdown is highlighted in green. The 'Type' is set to 'FILE'. The 'Requested For' field contains 'Paige SRS'. The 'Description' field is highlighted in green. Below the 'Description' field are 'From Date' and 'To Date' input fields, and an 'Indexed Notes' text area. A hand cursor is pointing to the 'Request New' button.

9. If you need additional files from this box repeat above steps.  
If not, select "Close" in the bottom right hand corner.

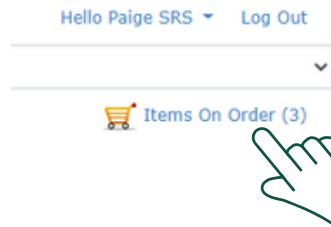


The screenshot shows the 'Request Contents' form with a table of 'Request new items'. The table has columns for Requested By, Item Barcode, Parent Item Code, FBU, Customer, Department, Description, From Date, and To Date. The first row shows 'Paige SRS', 'Unknown', 'C0000011385', 'SRS', 'Jane Doe', and 'Medical Records'. A hand cursor is pointing to the 'Close' button in the bottom right corner.

Requested By	Item Barcode	Parent Item Code	FBU	Customer	Department	Description	From Date	To Date
Paige SRS	Unknown	C0000011385	SRS	Jane Doe		Medical Records		

# STEPS TO REQUEST A FILE OR BOX

10. From the main screen, select the Shopping Cart and click the Shopping Cart icon in the upper right hand corner.



11. Review your order. If everything is correct, click "Send Order".



12. Verify your address and select the method of delivery.  
To request a file to be delivered electronically, choose "Scan on Demand".  
To request an entire box to be physically delivered, request "Standard Service".

In the "Comments", include anything specific you need from the file.

For example, "Path Report 2014" or "Case Notes".

Then select "Send".

Complete Send Order - PO1 Bluewing Family Practice

Delivery Address

Default Delivery Address: PO Box 179

Select Delivery Address: Address: Fakeville

Address: GA

State: GA

Order Information

Customer Order Reference: DEMO HOME OFFICE

Charge to Department

Comments

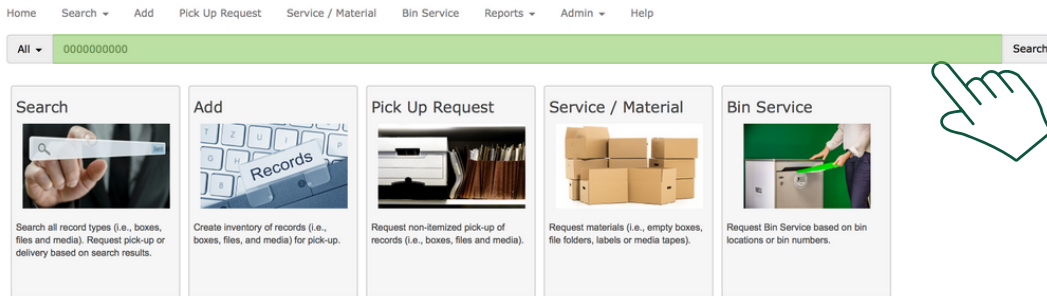
Customer Pickup - Standard Service  
Destruction Services  
Detail Indexing  
Micro Film Destruction Not NAID Certified Service  
Recycle Not NAID Certified Service  
**Scan on Demand**  
Standard Service  
Unscheduled Shred Service

Send Cancel

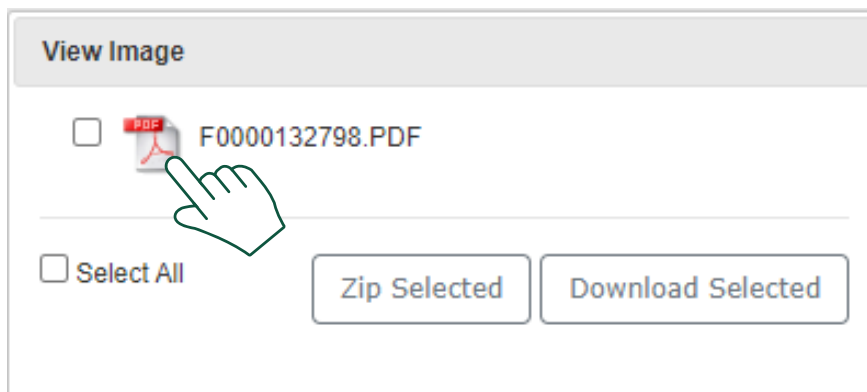
A screenshot of a "Complete Send Order" form. The form has several sections: "Delivery Address" with a dropdown menu and input fields for "Address" and "State"; "Order Information" with a "Customer Order Reference" dropdown and a "Charge to Department" field; and a "Comments" text area. A dropdown menu is open, showing various service options, with "Scan on Demand" highlighted in green. At the bottom, there are "Send" and "Cancel" buttons, with a hand cursor pointing to the "Send" button.

# STEPS TO REQUEST A FILE OR BOX

13. If you choose electronic delivery, our team will upload your file to the client portal. You will be sent a notification via email when the file is available for access. You can find the file by entering the file name in the search bar of the client portal.



14. After you click “Search”, your file will appear. Select the magnifying glass. A small screen will pop-up providing you with the option to view and download the file. Click the PDF Icon to view and download your file



If you need further assistance, feel free to contact our team.

Phone: (229) 226 - 0414  
Phone: (850) 656 - 6900

