Getting Started with eFax (Implementation and Setup)

Last Modified on 05/09/2024 11:00 am EDT

Version 21.3

> ✍ This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

About

Once your Practice has contracted for the eFax Service and the OP Implementation Team has completed their configuration and enabled this feature, you'll see additional options in the following areas of OP:

- **Main Navigation Panel**: Two new items, **Unread Fax** (if contracted for Inbound eFaxing) and **Failed Fax** (if contracted for Outbound eFaxing), are included in the Messages group. Both of these items display a badge count indicating that there are items that require attention by OP users who have been assigned to a fax-enabled OP Department. When clicked, the user is taken to the corresponding tab in the OP Message Center where they'll be able to access unread inbound faxes (Unread Fax) or troubleshoot and resend failed outbound faxes (Failed Fax).
- **Message Center** and **Message Window**: New tabs are displayed in the Message Center:
  - **Unread Fax** and **Read Fax** (if contracted for Inbound eFaxing)
  - **Failed Fax** and **Sent Fax** (if contracted for Outbound eFaxing)

In the sections below, you'll learn additional setup that your Practice needs to complete.

- Assign Permissions to Send Fax
- Assign Users to Fax-Enabled Departments
- eFax Size of Document Limits
- Increase Scanning Page Limit
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Assign Permissions to Send Fax

The Practice Administrator needs to add the **Messaging_Send_eFax** permission to each user who would need to have access to the **Fax** button in the Message window. This button is used to transmit outbound eFaxes.

1. Navigate to Security Administration: **Admin tab > Security Administration > Users tab.**
2. In the Users column, select a **Staff ID**.
3. In the Permissions column, select the **Messaging_Send_eFax** permission.

4. Click the left-facing arrow to assign the permission to the selected Staff ID.

Assign Users to Fax-Enabled Departments

The Departments in OP that were configured to receive inbound faxes were identified during your Practice's contracting and implementation of eFax. Follow the steps below to add users to those Departments. If you're not sure which Departments are mapped to receive eFaxes, confirm with your Practice Administrator or the OP Implementation Team.

1. Navigate to the Staff Directory: **Practice Management tab > Staff/Providers**.
2. In the Staff Name column, select a Staff member or Provider who needs to receive eFaxes.
3. Confirm their Department assignments or **add them to a Department** that has been configured to receive eFaxes.
   - **Note:** When you add new users to the department that receives eFax transactions, those users will only be able to view new eFax transactions going forward. They cannot see old eFax transactions created before they were added to your eFax department.

> **Note**: If it is decided to create additional Departments after the initial mapping for eFax has occurred, the Practice will need to contact OP's Implementation Team at **implementation@officepractium.com** to have that new Department configured for eFax.

eFax Size of Document Limits

The eFax limit is either **20mb** OR **250 pages**, whichever is hit first.

- A warning will appear as soon as your fax goes above **10mb** to let you know that you will potentially experience a slowed or even a blocked transmission.
- A warning will also appear if your fax is **>99** pages.
- OP will auto-compress any files over **10mb** to give your practice a better chance at successfully sending and staying under the maximum 20mb threshold.

Increase Scanning Page Limit

Document Management is the functional foundation of the eFax workflow. Because of this, you'll want to review the Scanning Page Limit set in Global Preferences and increase the Monochrome limit if your Practice will receive eFaxes that contain more pages than your Practice's current limit setting. This will ensure that your workflow for managing inbound eFaxes is not disrupted by exceeding the number of pages. See **Set Scanning Page Limit** for information on how to change this setting.

Version 20.17

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