

# eFax: Sending Faxes from OP (Outbound)

Last Modified on 05/31/2023 2:14 pm EDT

Version 21.0


 This is a contracted feature. Contact [solutions@officepracticum.com](mailto:solutions@officepracticum.com) to learn about implementing this in your Practice.

## About

eFaxing from OP is fundamentally the same as creating an internal Message in OP in that the information that will make up the Fax is added to the Message window > one or more recipients are selected > the message is sent > and a record of the message is maintained in the Patient Chart and in the OP Message Center.

Fax Message creation can be started from printable information in the Patient Chart (if in Preview or Transmit mode), the patient's Documents, or from scratch in the OP Message Center. Note, that respective of privacy/visibility controls in OP, only records with a privacy/visibility level of **Any Staff Member** may be attached to a Fax Message.

## Outbound Fax Cover Sheet Mapping and Disclaimer

When Outbound Faxes are generated, a Cover Sheet is created behind the scenes and is attached to the Fax Message. Below is an image of the Cover Sheet and a map of where the information is pulled from. You'll learn about the fields referenced in the Cover Sheet in the sections below. The formatting is that of a standard Cover Sheet and is not editable. It does, however, include a standard HIPAA disclaimer. The disclaimer reads: [Read More](#) 

FAX	To: <b>1</b>	FAXID93, TEST
	Fax No: <b>2</b>	15709048568
	From: <b>3</b>	FOWLER, REED
	Contact No: <b>4</b>	
	Date: <b>5</b>	11-15-2021 3:51 PM
	Subject: <b>6</b>	Medical records for MADDISON L. "MADDI" TEST (DOB:12/23/2009)
	No. of Pages (with cover): <b>7</b>	2

Document attached: Prescription **8**


Number	Description
1	<b>To:</b> Recipient's name (Last, First) that is selected in the To field in the Message window; auto-populated from the Address Book.
2	<b>Fax No:</b> Fax Number, either from the Address Book or the number that is manually entered by the user creating the Fax Message.
3	<b>From:</b> OP user who is creating the Fax Message; auto-populated with the logged-in user.
4	<b>Contact No:</b> Populates the Practice Location phone number, if there is no phone number listed, the field will remain blank.
5	<b>Date:</b> Date and Time auto-populated according to when the Fax Message is transmitted from the Fax Vendor.
6	<b>Subject:</b> Populated with the Subject line of the Message.
7	<b>No. of Pages (with cover):</b> Total pages, including Cover Sheet; auto-calculated based on number/length of attachment(s).

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**Message:** Populated with what the user enters into the Message field when creating the Fax Message. If a message exceeds 5,500 characters then the Cover Sheet may extend to more than one page. The maximum number of characters in the Message field is 64,435.

## Start a Fax Message...


### With Printable Info From the Patient Chart

Follow these steps to start a Fax Message from a printable section of the Patient Chart if you have Preview or Transmit selected as your **Output Option** at the top of OP. Note that Care Plans and Surveys generate differently and cannot be transmitted via eFax message. [Read More](#) 

### From a Patient's Documents


Follow these steps to start a Fax Message that will contain a Document that is already scanned or saved into the patient's Documents. [Read More](#) 

### From Scratch (Patient or Non-Patient Message)

Follow these steps to start a Fax Message with no fields populated. Note that this is the same workflow you would follow if you were creating any Message in OP, including a non-patient Message. [Read More](#) 

## Complete the Message Window and Send the Fax Message



Follow the steps below after you have already started creating the Fax Message and the Message window is displayed.

1. (If necessary) Select the **Urgent** checkbox. This adds "Urgent" to the Subject line on the Fax Cover Sheet.
2. Review or complete the **Subject** and **Message** fields. This information is included on the Fax Cover Sheet.
  - If you started the Message from the patient's chart or Documents, review the information that is auto-populated, and make edits as needed.
  - If you started the Message from scratch, enter a Subject and Message. Make sure to include pertinent patient information, such as name, date of birth, etc.
3. Complete the **To** field to identify one or more recipients by using the following options. This information is included on the Fax Cover Sheet.
  - Use the drop-down to select the recipient(s) one at a time.
    - If internal OP users or Departments are selected, the Message will not be faxed but rather will be sent as a regular Message that will be received in the **Unread Phone** tab of their Message Center. This should be used if you need to CC the OP user or Department on a Fax Message.
  - Click the **Address Book** button  to open the Choose Recipients window where you will select the **Send** checkbox for all recipients and click **OK**.
  - Manually type in a valid Fax Number. Validation occurs to make sure there are 10 digits or 11 digits (if including leading 1) entered.



**Tip:** If selecting from the drop-down or the Choose Recipients window, you can hover over the recipient's name in the To field to see their fax number. If an edit needs to be made, click the recipient's name to access their Address Book record.

4. Review or complete the **Attachments** section of the Message.

- If you started the Message from the patient's chart or Documents, the attachment is auto-populated.
  - To remove an attachment, click the **X** button located in the Drop column and click **OK**.
  - To add additional attachments, use one or both of the following methods, depending on if you're attaching information from the chart or scanned/saved Documents :
    - **Chart Info:** Keep the Message window open, navigate to what you want to include just as you did when you started the Message, and follow the same steps you followed to launch the Message window. The new attachment will automatically be added to the existing Message window.
    - **Documents:** Click the **Attach** button  to open the Search for Documents window and select the Document(s) you want to include before clicking the **Use Selected Document(s)** button. To select multiple Documents, hold **Shift** on your keyboard as you click to select the Documents. If selecting a .xml file you will receive an Attachment Error, click **OK** and select a different file.
- If you started the Message from scratch and there are no Attachments, click the **Attach** button  to open the Search for Documents window and select the Document(s) to attach. To select multiple Documents, hold **Shift** on your keyboard as you click to select the Documents. If selecting a .xml file you will receive an Attachment Error, click **OK** and select a different file.
  - To add information from the chart that isn't scanned/saved as a Document, keep the Message window open, navigate to what you want to include, and follow Steps 1-2 in the [Start a Fax Message with Printable Info From the Patient Chart](#) section. The new attachment will automatically be added to the existing Message window.



**Tip:** If you have multiple Patient Charts or Messages open while you're following the above workflows, OP will correctly identify and associate the attachments to the correct Message using the patient's ID.

5. Click the **Fax** button. The Fax Message is created. Refer to the [View Fax Status](#) section to learn about verifying the Message's transmission status.



**Note:** If an issue is encountered that prevents the attachment(s) from being successfully attached to the Message, an error is displayed. Possible errors include:

- **[Document ID] Privacy restriction:** The Document referenced by Doc ID in the Attachments section of the Message has a privacy/visibility level higher than Any Staff Member. The Document must be dropped from the Message to be able to proceed with sending the Fax Message.
- **[Document ID] S3 Correspondence unavailable:** The Document referenced by Doc ID in the Attachments section of the Message could not be retrieved for sending. The Document must be dropped from the Message to be able to proceed with sending the Fax Message.
- **S3 Network/server error:** The server timed out or the Document referenced by Doc ID in the Attachments section of the Message could not be retrieved for sending. Click the **Fax** button again to retry.

## View Fax Status

Once sent, Outbound Faxes and their attachments are displayed in the **Sent Fax** tab. From there, Faxes that fail are moved to the **Failed Fax** tab of the Message Center, where detailed information about the failure reason is displayed. All statuses are displayed **per recipient**.

### Sent Fax Statuses

- **Sent** - Being sent to Fax Vendor
- **In Progress** - Being sent to Recipient by Fax Vendor
- **Success** - Successfully sent the message to Recipient by Fax Vendor

## Failed Fax Statuses

- **Failed from OP** - The message couldn't be sent to the Fax Vendor. Detailed information for the failure is displayed in the **Failed Reason** section located at the bottom of the window.
- **Failed from Fax Vendor** - The message was received by the Fax Vendor but could not be transmitted to the recipient. Detailed information for the failure is displayed in the **Failed Reason** section located at the bottom of the window.

Failed Faxes, whether or not they are resent, can be archived by selecting the **Archive** checkbox. This hides them in the Failed Fax tab. To redisplay archived Failed Faxes, select the **Show Archived** checkbox. Archived failures are not included in the badge count for Failed Faxes.

## Resend a Fax Message

Outbound Fax Messages can be resent directly from the Sent Fax and Failed Fax tabs in the Message Center. If you're attempting to resend a Failed Fax, make sure that you correct the issue for the failure prior to attempting to resend. Because the resending of Faxes triggers a new Fax transaction, the original failure remains in the Failed Fax tab where it can be archived.

1. Navigate to the **Sent Fax** or **Failed Fax** tab in the Message Center.
2. Select the eFax Message that you'd like to resend.
3. Click the **Resend Fax** button. The message window is displayed just as it was when the original eFax Message was created.
4. (Optional) If the original Message failed because of an invalid Fax Number:
  - a. Click in the **To** field and add the correct Fax Number.
  - b. Click the **Remove Recipient** button to remove the incorrect number or recipient, and click **Yes** to confirm the removal.
5. Click the **Fax** button. The Fax Message is resent and is displayed in the Sent Fax tab where you can review the transmission status.

## Demo Videos

Double-click the video thumbnail or click the **Full Screen** button  to maximize the video windows.

Shows how to:

- Access the Resend Fax button
- Add a new recipient and remove the original recipient
- Resend a Failed Fax

*Run-time: 2:27*