

eFax: Receiving Faxes into OP (Inbound)

Last Modified on 11/21/2022 8:51 am EST

Version 20.18

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

Path: Main Navigation Panel > Unread Fax

About

Inbound Fax Messages are received in the **Unread Fax** tab of the Message Center by the users who have been added to fax-enabled departments in OP. These users are notified of a new Fax Message via badge count for Unread Fax(es) in OP's Main Navigation Panel, sometimes referred to as the Alert Bar. If you're not sure which Departments are mapped to receive Fax Messages, confirm with your Practice Administrator or the OP Implementation Team.

Below, you'll learn the recommended 2-step workflow for reviewing Inbound Fax Messages and assigning the attachment(s) to the correct patient(s). **These steps are intended to be followed in order:**



Step 1: View the Fax Message to Identify Which and How Many Patients Are Included



Warning: Skipping this step and jumping right to Edit Mode explained in Step 2 may result in the accidental saving of patient Documents to an incorrect Patient Chart.

Inbound Faxes come into OP as non-patient messages and have a subject of *New Fax Message from ... (number of pages)*". The maximum number of pages per transaction is 99. Anything over 99 pages, will be received in a separate message.

Before attaching a Fax Message to a patient, you first need to view the pages in the Message to determine which and how many patients are included in the message. You can refer to the number of pages included in the Subject of the message, but that may not always be a clear indicator. By default, a Fax Cover Sheet is always included in the page count.

1. Navigate to and click the Fax Message in the Unread Fax tab of the Message Center.
2. Click the **EFAX** button  located in the **View** column . The Manage Documents window is displayed with the pages of the Fax Message displayed as thumbnails on the left side of the window.



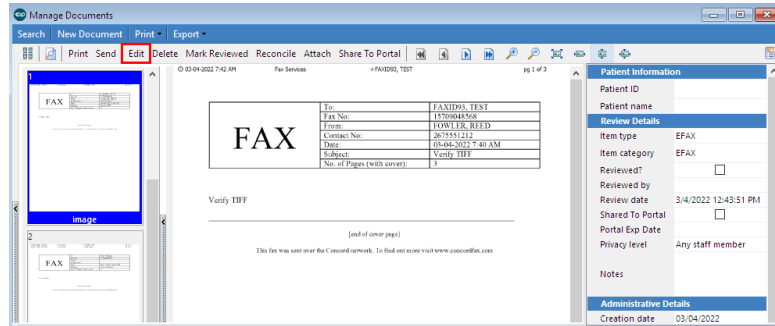
Note: When you hover over the **EFAX** button, you will be notified on-screen if the fax is still processing or has been deleted from Document Management.

3. Click each page to identify if all pages in the Message pertain to a single patient or if there are pages for multiple patients. If needed, right-click the thumbnail and select **Show Image Full Screen** to enlarge the image.
4. Keep the Manage Documents window open, and based on the number of patients identified, proceed to one of the following sections in Step 2:
 - **Attach a Single-Patient Fax Message to the Patient's Chart**
 - **Separate Pages in a Fax Message to Attach to Multiple Patient Charts**

Step 2: Attach the Fax Message to the Patient Chart

Attach a Single-Patient Fax Message to the Patient's Chart

1. With the Manage Documents window already open where the thumbnails are displayed on the left side of the window, click the **Edit** button.



2. Proceed by searching for and selecting the patient and **labeling the Document** and **sending the Document to another Staff Member/Provider to review** as you normally would, according to your Practice's standards.



Note: If the Fax is for a patient who is not yet a registered patient with your Practice, click the **New Patient** button within the Patient Search window to create a new chart.



3. Click the **Save** button and close the Manage Documents window.

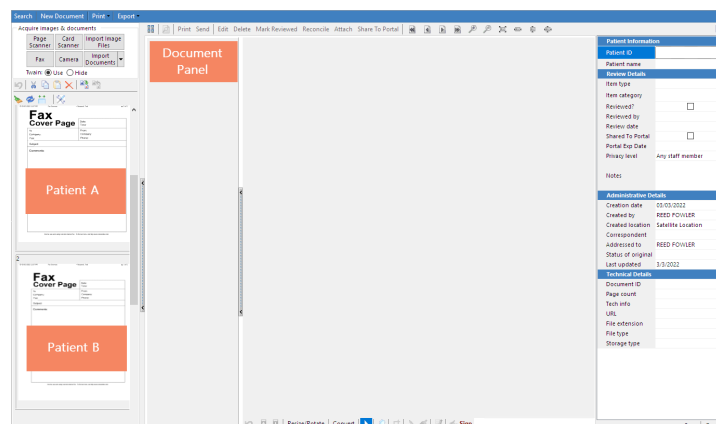


Note: The entire Fax transaction (Message and Document(s)) is saved to the patient's chart. Back in the Message Center, the patient's name column is updated from (non-patient message) to display the patient's name.

4. Return to the Message Center and select the **Read** checkbox to move the Fax Message from the Unread Fax tab to the Read Fax tab.

Separate Pages in a Fax Message to Attach to Multiple Patient Charts

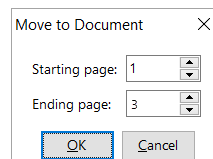
1. Close the Manage Documents window and return to the Fax Message in the Message Center.
2. Click the **EFAX** button  located in the **Edit** column . The Manage Documents window is displayed with the pages of the Fax Message displayed as thumbnails in the Sketch Panel (Patient A and Patient B callouts in the image below).





Warning: Opening and closing message after message using the Edit button *without* moving pages out of the Sketch Panel will accumulate **all** pages for **all** opened Fax Messages in the Sketch Panel, with the most recent at the bottom. To avoid confusion and extra work to delete unnecessary page copies, it is recommended to always use the View button to view the contents of a Fax Message first, as detailed above in **Step 1: View the Fax Message to Identify How Many Patients Are Included**.

3. Move the pages for the first patient to the Document Panel using one of the following methods:
 - Click to select one page at a time and drag and drop it into the Document Panel.
 - Right-click a page in the Sketch Panel and select **Copy from Sketch folder to Document**. Then, in the Move to Document window, select or enter the starting and ending page numbers to move and click **OK**. For example, to move pages 1, 2, and 3, you'll enter Starting page 1 and Ending page 3.



4. Proceed by searching for and selecting the patient and **labeling the Document** and **sending the Document to another Staff Member/Provider to review** as you normally would, according to your Practice's standards.



Note: If you have pages for a patient who is not yet a registered patient with your Practice, click the **New Patient** button within the Patient Search window to create a new chart.

5. Click **Save**; then click **No** in the Confirm window when asked if you want to retain previous details.
6. Click the **X** in the **Patient ID** field and confirm you don't want to associate the document with any patient. **This step is taken at this point as a preventative measure to ensure you don't accidentally retain the previous patient's ID/name.**
7. Repeat steps 3-6 above for the remaining patients' page(s).



Note: The Fax Document pages are assigned to each of the patient's charts for which they've been assigned. Back in the Message Center, the patient's name column remains as (non-patient message).

8. Close the Manage Documents window.
9. Return to the Message Center and select the **Read** checkbox to move the Fax Message from the Unread Fax tab to the Read Fax tab.

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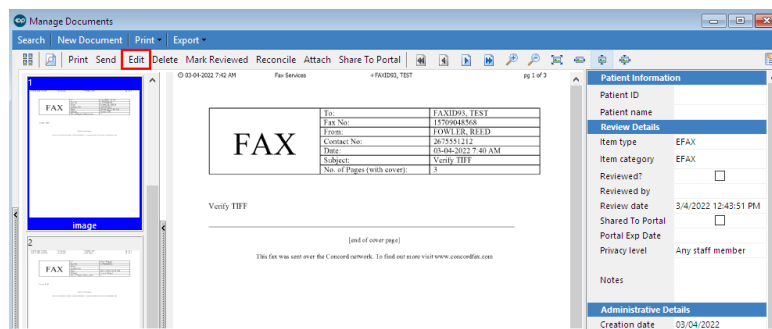
1. Navigate to and click the Fax Message in the Unread Fax tab of the Message Center.
2. Click the **EFAQ** button  located in the **View** column . The Manage Documents window is displayed with the pages of the Fax Message displayed as thumbnails on the left side of the window.
3. Click each page to identify if all pages in the Message pertain to a single patient or if there are pages for multiple patients. If needed, right-click the thumbnail and select **Show Image Full Screen** to enlarge the image.
4. Keep the Manage Documents window open, and based on the number of patients identified, proceed to one of the following sections in Step 2:

- **Attach a Single-Patient Fax Message to the Patient's Chart**
- **Separate Pages in a Fax Message to Attach to Multiple Patient Charts**

Step 2: Attach the Fax Message to the Patient Chart

Attach a Single-Patient Fax Message to the Patient's Chart

1. With the Manage Documents window already open where the thumbnails are displayed on the left side of the window, click the **Edit** button.



2. Proceed by searching for and selecting the patient and **labeling the Document** and **sending the Document to another Staff Member/Provider to review** as you normally would, according to your Practice's standards.



Note: If the Fax is for a patient who is not yet a registered patient with your Practice, click the **New Patient** button within the Patient Search window to create a new chart.



3. Click the **Save** button and close the Manage Documents window.

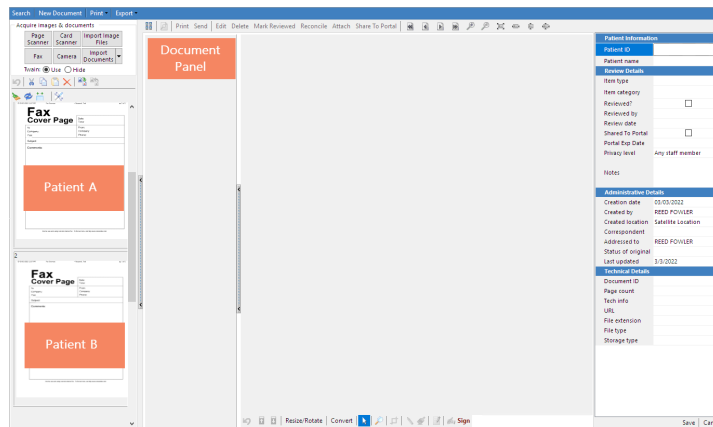


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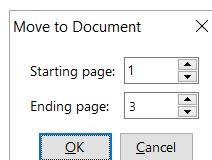
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