

eFax: Usage Report and Audit Trail

Last Modified on 08/08/2022 11:26 am EDT

Version 20.17

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

About

There are a couple of ways to gather data about eFaxes, both from an overall Practice usage perspective and at the individual patient level. Below, you'll find information on how to:

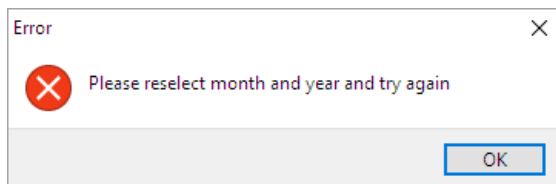
Run an eFax Usage Report

The eFax Usage Report is used at the Practice-level to gain insight into inbound and outbound eFax page consumption (usage), based on a Month/Year parameter. Once the parameter is selected and the report is downloaded, it is available as an Excel CSV file.

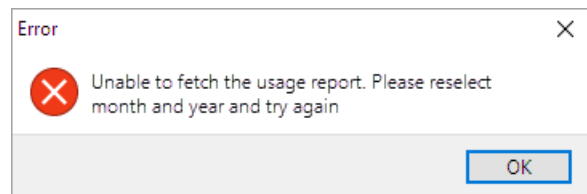
1. Navigate to the eFax Usage Report: **Admin tab > eFax Usage**
2. *(Required)* Select a **Month** from the drop-down.
3. *(Required)* Select a **Year** from the drop-down.
4. Click the **Download** button.

Tip: If you receive one of the following error messages, there is no eFax usage for the Month/Year specified. You'll need to choose another combination to report.

*Occurs when there is **no report** for the selected Month/Year:*




*Occurs when a **future** Month/Year is selected:*



5. In the Save As window, select where you'd like to save the downloaded report.
 - **Cloud Practices:** Save the report as you normally would -**Network > tsclient > \\tsclient\C > Users > Your Name** (or another previously established folder for Cloud downloads)
 - **On-Premise:** Save the report locally
6. Enter a file name for the report.
7. Click **Save**. You're notified on-screen that the report was successfully saved; click **OK**.

Review eFax Actions/Changes in a Patient's Audit Trail

OP's Audit Trail captures actions/changes for both Inbound and Outbound eFax Messages that are available to view by patient or date range in:

- **Admin tab > Audit Trail > Audit Trail of Changes to Records** To include the before and after changes in the grid, click the **Show/Hide Visible column** button  located to the left of the Date column and select the **Before Changes and After**

Changes checkboxes.

- **Admin tab > Audit Trail > Log of Access and Review of Records** To include the action taken on the fax, click the **Show/Hide Visible column** button, located to the left of the ID column, and select the **Action Value** checkbox.

Below is a list of eFax actions that are recorded in the Audit Trail.

- Linking and/or unlinking of a patient to a Fax Message
- Changing of the linked patient
- Marking Inbound Fax Messages as Read
- Sending of Fax Messages
- Resending of Fax Messages
- Printing of Fax Messages with linked patient
- Printing of Fax Message lists with linked patient
- Fax message replies (including Reply All), Comments, and Forwards

Version 20.16

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About

There are a couple of ways to gather data about eFaxes, both from an overall Practice usage perspective and at the individual patient level. Below, you'll find information on how to:

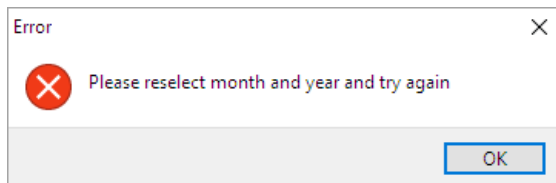
Run an eFax Usage Report

The eFax Usage Report is used at the Practice-level to gain insight into inbound and outbound eFax page consumption (usage), based on a Month/Year parameter. Once the parameter is selected and the report is downloaded, it is available as an Excel CSV file.

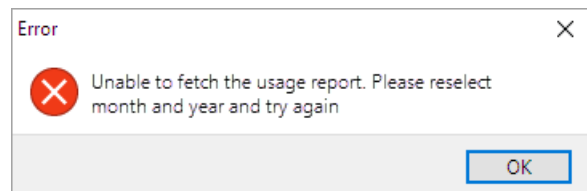
1. Navigate to the eFax Usage Report: **Admin tab > eFax Usage**
2. *(Required)* Select a **Month** from the drop-down.
3. *(Required)* Select a **Year** from the drop-down.
4. Click the **Download** button.

Tip: If you receive one of the following error messages, there is no eFax usage for the Month/Year specified. You'll need to choose another combination to report.

*Occurs when there is **no report** for the selected Month/Year:*



*Occurs when a **future** Month/Year is selected:*



5. In the Save As window, select where you'd like to save the downloaded report.


- **Cloud Practices:** Save the report as you normally would -**Network > tsclient > \\tsclient\C > Users > Your Name**(or another previously established folder for Cloud downloads)
- **On-Premise:** Save the report locally

6. Enter a file name for the report.
7. Click **Save**. You're notified on-screen that the report was successfully saved; click **OK**.

Review eFax Actions/Changes in a Patient's Audit Trail

OP's Audit Trail captures actions/changes for both Inbound and Outbound eFax Messages at the patient level. Below is a list of eFax actions that are recorded in the Audit Trail of Changes to Records tab in the patient's Audit Trail (**Admin tab > Audit Trail > Audit Trail of Changes to Records tab**).



Tip: To include the before and after changes in the grid, click the **Show/Hide Visible column** button  located to the left of the Date column and select the **Before Changes** and **After Changes** checkboxes.

- Linking and/or unlinking of a patient to a Fax Message
- Changing of the linked patient
- Marking Inbound Fax Messages as Read
- Sending of Fax Messages
- Resending of Fax Messages
- Printing of Fax Messages with linked patient
- Printing of Fax Message lists with linked patient
- Fax message replies (including Reply All), Comments, and Forwards