



## Faxes Received & Viewing Sent Faxes

### Objective:

- To open and view faxes received
- To handle faxes in the my task interface
- To filter and forward faxes received
- To reply to prescription refill request faxes
- To forward and approve lab faxes
- To view faxes sent

### HotKeys:

Ctrl + D - Delete a record  
Ctrl + S - Save a record  
Ctrl + R - Retrieve all records  
Ctrl + I - Print preview  
Ctrl + P - Print  
Tab - toggle between search fields



**Faxes Received** can be accessed by clicking on the first phone with red arrow.

The window below will launch. Notice the filters on the top row.

- Date from and to range
- Status (All, New, Pending, To be done, Forwarded, Acknowledged, Done)
- Responded by (All or list of employees in the system)
- Fax No. - allows user to filter by fax number.
- Office - useful if multiple offices are part of this practice
- Fax Line - useful if multiple fax numbers are used by office
- Retrieve button



### NOTES:

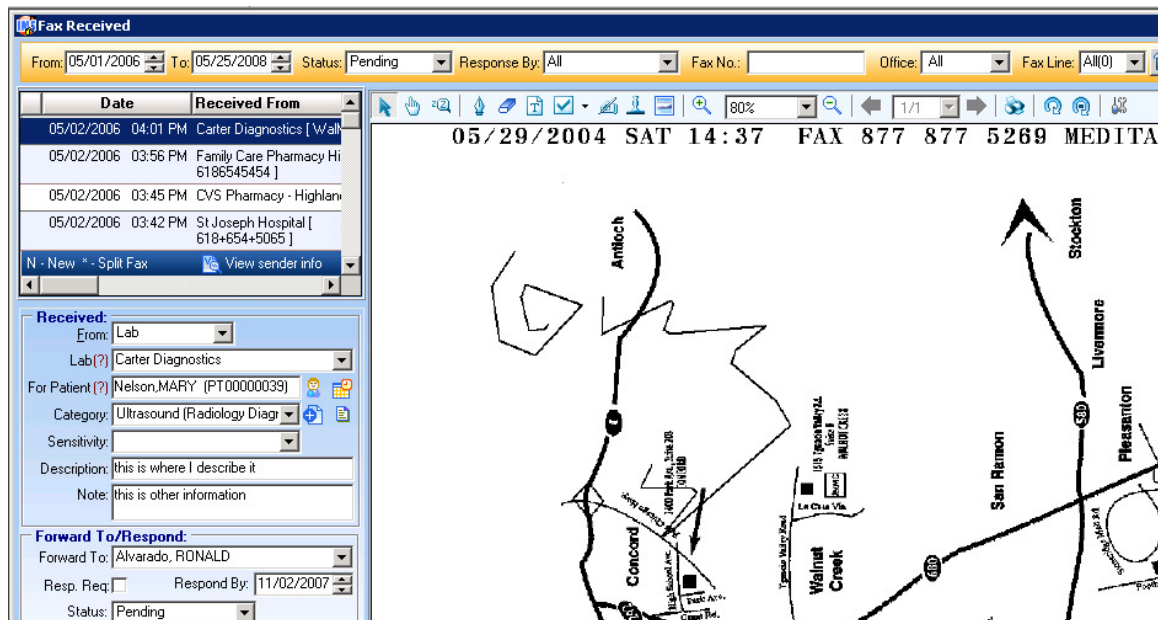
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**Views:** There are 3 ways to view the faxes received.

1<sup>st</sup> View is shown in this document with details to the left and the fax itself to the right. The 2<sup>nd</sup> icon shows only the fax itself. The 3<sup>rd</sup> icon shows the fax itself at the top of the screen and the details of this fax at the bottom.



**Each office should dedicate two individuals to monitor faxes received.**

When a **fax is received** the user will open the fax, determine if it is related to the practice or simply a junk fax to be deleted from the system –such as an advertisement.

Next the user will choose the filters such as:

**NOTES:**

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- From
- Category
- Note
- Forward to
- Status
- Who it is from
- Sensitivity
- Response Required
- Patient
- Description (optional)
- Respond by date



Date	Received From
05/02/2006 04:01 PM	Carter Diagnostics [ WalMart ]
05/02/2006 03:56 PM	Family Care Pharmacy Highland [ 6186545454 ]
05/02/2006 03:45 PM	CVS Pharmacy - Highland
05/02/2006 03:42 PM	St Joseph Hospital [ 618+654+5065 ]
N - New * - Split Fax View sender info	

Input / link the information then Save.

The individual this fax is **Forwarded to** will find the **fax** in their “My Task” in the **Fax** area.

**Received:**

From: Lab

Lab(?) Carter Diagnostics

For Patient (?) Nelson, MARY (PT00000039)

Category: Ultrasound (Radiology Diag)

Sensitivity:

Description: this is where I describe it

Note: this is other information

**Forward To/Respond:**

Forward To: Alvarado, RONALD

Resp. Req: ☐ Respond By: 11/0

Status: Pending

Done By: On: 00/0

Printed By:

Note:

My Tasks				
Alvarado, RONALD				
Date	Received From	For	Forward to	
N 05/02/2006 04:01 PM	Carter Diagnostics [ WalMart ]	Nelson, MARY (PT00000039)	Alvarado, RONALD	
05/02/2006 02:21 PM	WalMart Highland [ WalMart ]	Koch, MIKE (PT00002040)	Alvarado, RONALD	
N 05/02/2006 01:50 PM	James, Jeffrey [ 3146534321 ]		Alvarado, RONALD	
N 05/02/2006 01:20 PM	Walgreens - Belleville	Smith, Theodore (PT00002543)	Alvarado, RONALD	
N 05/02/2006 11:28 AM	St Lukes Laboratory	Kloss, JANET (PT00002529)	Alvarado, RONALD	
N 05/02/2006 09:55 AM	Apria Healthcare (Collinsville)	Crawford, MIKE (PT00000032)	Alvarado, RONALD	
N 05/01/2006 05:15 PM	surgical center [ 3144344419 ]	Weiss, JOHN (PT00000017)	Alvarado, RONALD	
N 05/01/2006 04:14 PM	Family Care Pharmacy Highland [ 6186545454 ]	Vanvoorden, JOHN (PT00002491)	Alvarado, RONALD	
N 05/01/2006 04:02 PM	Highland Health Care [	Subert, SUSAN (PT00001710)	Alvarado, RONALD	

## NOTES:

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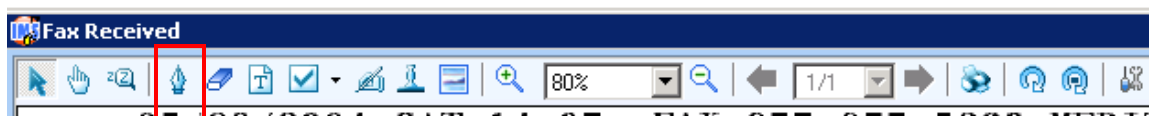
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## Faxes for Prescription Refills Request

When a Pharmacy faxes in a request for a refill, the monitoring individuals can forward this request to the Provider's **My Task Fax** area.

To approve the refill the Provider can use a **stylist** from a tablet pc, click the Pen icon, then write approved and send back to the Pharmacy.



Or click Refill and have a staff member fax later.

<b>Received:</b>	
From: Pharmacy	Pharmacy (?) Walmart Highland
For Patient (?) Nelson, MARY	Category: 02PrescriptionsOld
Description: this is where I describe it	Note: this is other information
<b>Forward To/Respond:</b>	
Forward To: Alvarado, RONALD	Response Req.: <input type="checkbox"/> Respond By: 11/02/2007
Done By:	Status: Pending
On: 00/00/0000	Printed By:
Note:	
<div> View  Refill  Authorization  Send  Delete  Save</div>	

If the prescription is **not one to be refilled**, the Provider can **Respond** and **Forward** back to a staff member to call the patient, deny the refill, etc.

## Faxes Received and Lab Results

If the practice is not using the HL7 interface, then Lab Results will be received by fax.

Just like the Prescriptions, Lab Results can be forwarded to the Provider for review and placed in "**My Task**" in the **Lab** area.

## NOTES:

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Alvarado, RONALD

Lab

Document (47)

Fax (367)

Note (0)

Reminder (55)

Lab (63/13/7)

	O	S	Status	Patient	Order Date	Lab
	L		To Be Ordered	Smith, Theodore (PT0000254)	06/23/2006	Quest
>	L	F	Received	Smith, Theodore (PT0000254)	08/24/2006	in house
	D		Ordered	Smith, Theodore (PT0000254)	12/13/2006	St. Joseph Radiology
	L		Ordered	Smith, Theodore (PT0000254)	12/13/2006	Quest
	D		Ordered	Smith, Theodore (PT0000254)	12/28/2006	Express Diagnostics
	L		Ordered	Smith, Theodore (PT0000254)	12/28/2006	ABC Labs
	L		Ordered	Smith, Theodore (PT0000254)	12/31/2006	ABC Labs

All faxes will be reviewed, linked to patient and easy to find within the Patient Document area at a later date.

#### NOTES:

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## FAXES SENT



Click on the 2<sup>nd</sup> **phone icon** to open the Faxes Sent window.

From: 05/01/2006		To: 05/25/2008		Status: All	Priority: All	Sent By: All	Fax No.:	 Retrieve	
	Sent By	Status	Date	Fax No.	Priority	Retry	Patient	To	Subject
> *  system	Failed	05/08/2008 07:51 AM	5105555319	Low	1	TEST, DUMMY (PT00002547)	St Joseph Hospital	 Visit Note	
2 *  system	Failed	04/11/2008 03:49 PM	510-555-2238	Low	1	TEST, DUMMY (PT00002547)	Apria Healthcare (Collinsville)		
3 *  system	Not Sent	01/30/2008 04:07 PM	510-555-4210	Low	1	Adams, Frances (PT00002568)	Caremark Mail Order	 Prescription	
4 *  system	Not Sent	01/30/2008 04:07 PM	510-555-4210	Low	1	Adams, Frances (PT00002568)	Caremark Mail Order	 Prescription	
5 *  system	Not Sent	01/18/2008 03:35 PM	5105558768	Low	1		Quest		
6 *  system	Failed	01/10/2008 12:48 AM	757-656-6757	Low	1	Testbyz, Test (PT00002556)	in house	 Lab Order	

From this screen users can view the faxes sent out.

The Status records if the Fax has Not been Sent, has Failed, or was Sent.

Users can print out a list of Failed Faxes, or select and Resend.



## NOTES:

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### Tips:

If you are not seeing any faxes in your Received faxes folder make sure you check your fax filter. The status window can be changed to view all of your various faxes.

### Parameter Settings:

Under Setup >>> Parameters >>> System Parameters you will find the options below.

Parameter	Value
» Fax Files Path	\\IMSdb1\IMS_Rabecca_Data\fax_docur
Show CC when Print,Fax or Email	Yes
Show hospital visit in Print, Fax, Email or Document	No
Use visit note doctor signature when print/fax Rx from check out	Yes
Select save check box for letter from visit note fax	Yes

Under Setup >>> Parameters >>> User Parameters you will find the options below.

Parameter	Value
» Default days interval to view received faxes	4
Default fax status to view received faxes	Pending/Forwarded
Default fax status to view received faxes for My Task	Pending/Forwarded
Fax Received Screen Layout	List With Image (Default)
Fax Sent Screen Layout	Maximize List
Open fax after sign off	No
Show fax detail in fax receive window [ opend from My Task -> Fax ]	Yes
Zoom factor for Fax	Fit to Width

### NOTES:

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### Troubleshooting:

The user's rights to view the Faxes Sent and Received are setup from Setup >>> Security. Note the check in Fax Admin. The user must have this checked in order to view Faxing functions of the program.

Or, if the system gives an error while sending faxes from Visit Note (such as a Prescription) one thing you can check is the user's rights/permission and make sure they are allowed to send faxes.

A screenshot of a Windows-style dialog box titled 'Set Log Id'. It has a standard title bar with a question mark and close button. The dialog contains several fields and checkboxes. 'Active:' is checked. 'User ID:' has 'John' entered. 'Password:' and 'Confirm:' are masked with 'xxxxx'. 'Fax Admin:' and 'Reminder:' are checked. 'Backup:' and 'Lock:' are unchecked. There is a 'Set User PIN' button. At the bottom are 'Ok' and 'Cancel' buttons.

Set Log Id

Active: ☒

User ID: John

Password: xxxxxx

Confirm: xxxxxx

Fax Admin: ☒ Reminder: ☒

Backup: ☐ Lock: ☐

Set User PIN

Ok Cancel

### NOTES:

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