Faxing

Introduction 3
Sign & Fax & Notify one-click (default recipients) 3
Sign & Fax & Notify with popup (custom recipients) 5
Send Fax 10
Fax History 13
Introduction

Nightly faxing is being replaced with fax-on-sign and fax-on-demand. With the new fax-on-sign feature, users can both sign and fax a document simultaneously with just one click, and the documents are queued to be faxed immediately. In this document, you will learn how to sign and send a fax to default or custom recipients, and check the status by accessing the fax history.

This training document presents a step-by-step process to Sign, Fax and Notify.

Sign & Fax & Notify one-click (default recipients)

Sign and fax a document to the default recipients in the Health Care Team by only clicking one button. Also, this button continues to notify via tasks as before.

Open a document in the Documents Chart section or in Unsigned Reports.

Select the document you wish to sign and fax.
If you click the **Sign + Fax** button, the document will be automatically both signed and faxed.

**NOTE:** In the button you will see the number of faxes that will be sent. If a **Referring Physician** should be notified via tasks, it will also display in the button.

A **Signed** green ribbon with date signed will display on top of the document.
Sign & Fax & Notify with popup (custom recipients)

Sign and fax a document, adding/removing fax recipients, with the Health Care Team by default. Users can optionally notify via tasks, as before.

Open the document you wish to Sign & Fax & Notify. Click the dropdown button next to the Sign+Fax button on the top-left.

A popup will display. Review the recipients under Send Faxes to Providers. The default recipients are set to all Health Care Team Providers with fax numbers that also have Fax-on-Sign set to Yes.
Click the **trash icon** to the right of providers to remove them as recipients.

Click the **+** icon below the existing providers to add a new provider.

Make sure the provider selected has a valid Fax Number set (it will display to the right of the name)
You can also add an **Additional Fax Number** for non-providers by clicking the + icon in that section of the popup. Ensure the fax number typed is a valid fax number.

**NOTE**: You can also skip faxing completely for this note, performing only Sign & Notify, by unchecking **Send faxes on sign**.
You can also select task recipients to notify with a **Document Ready for Review Task**.

If you do not wish to create any tasks while signing this document, you can uncheck the **Create task on sign** checkbox.

**NOTE**: Users will only be able to see this function if they have the **Create Tasks** permissions.
Before clicking the **Sign** button and to avoid getting an error message, make sure:

- If the Send faxes on sign checkbox is selected, there is at least one fax number assigned to send this document to (either provider or additional).
- All additional fax numbers are valid and not blank.
- If the Create tasks checkbox is selected, there is at least one recipient assigned to be notified.
Send Fax

Fax a document at any time (without signing it).

Click the **Document dropdown** menu arrow on the far right of the document list (next to the print and pdf icons) in the target document’s row.

Select the **Send Fax** option from the dropdown list.
Review and edit the recipients if necessary.

NOTE: You can add additional recipients by clicking the + icon in the Additional Fax Numbers section.
You can also **add a Fax Cover Page Comment** in the field provided if necessary. This field is not mandatory.

Click the **Fax** button to send the fax.
Fax History

Review the history of ALL faxes sent of this document, including date/time, success/failure, and recipient.

Click the Document dropdown menu arrow on the far right of the document list (next to the print and pdf icons) in the target document’s row.

Select the Fax History option from the dropdown list.
A pop-up displays with the details of each fax sent for this document.

- Recipient fax number
- Recipient’s name if recipient was a provider
- Creation date/time,
- Sending date/time,
- and Status:
  - In Progress: This means the fax is in the process of sending, check the status again after some time to make sure the status changed to Sent.
  - Sent: This is a confirmation that the fax has already been sent.
  - Failed: This means the fax has not been sent due to an issue. Review the faxing information and try sending it again.

If the fax status is Failed, you can also click the Failure details.

NOTE: If you have MQ Messages View permissions, you will be able to click the MQ Message Details to learn more.