

User Guide: Faxing



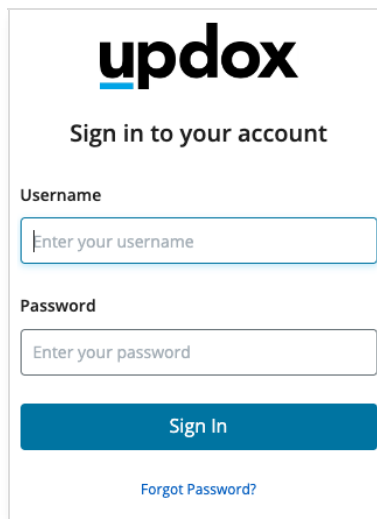
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How to Use Updox Electronic Fax

A quick guide to get your practice using Electronic Fax today.

Log in to Updox

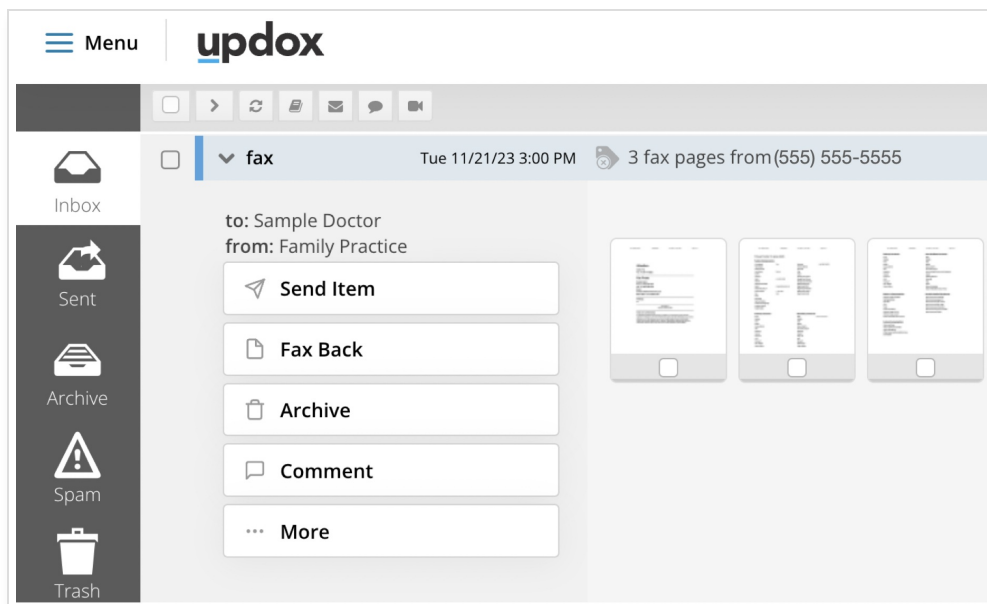
1. Enter your username and password to log in to your Updox account.



The login form features the Updox logo at the top, followed by the heading "Sign in to your account". Below this are two input fields: "Username" with a placeholder "Enter your username" and "Password" with a placeholder "Enter your password". A blue "Sign In" button is positioned below the password field, and a link for "Forgot Password?" is located at the bottom of the form.

Inbound Faxes

2. An inbound fax will appear in your Inbox as a blue line item. Click on the > sign to expand the fax to see all pages.



Edit Fax Pages

3. By clicking on the pages of your fax, you'll open the Document Editor. Commonly used editor tools are:

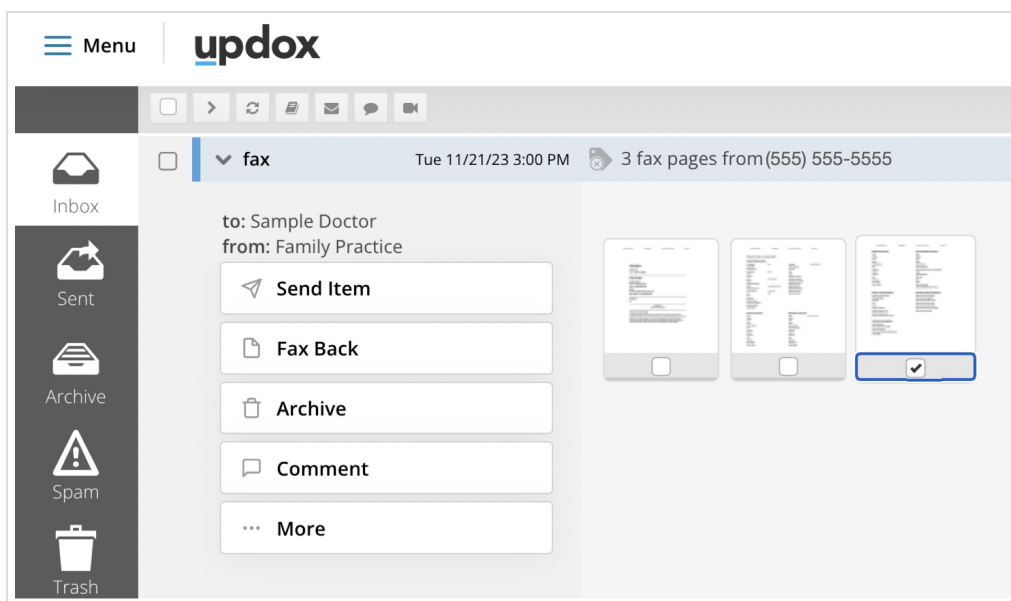
- Adding text for notes
- Physician added signature stamp with date/time for faxing back to the sender
- Highlight prominent information for extra attention

Click **save** when all edits are complete to return to fax.



Selecting Specific Fax Pages

4. Prior to saving the fax to the patient chart or faxing it out, choose only the pages that are needed by checking the box on the page.



Sending to the Patient Chart

5. If your Updobox is connected to your EHR, you can send the fax directly to the patient chart. Choose Send Item, then type the patient's name, DOB or chart number to find the correct patient. Then click Send to EHR, OK, then Send. You'll be able to enter a subject, choose the category within the chart to display the fax, as well as add additional notes.

Compose [X]

Search for a patient, contact, email or fax number...

Laurie Sample

Laurie Sample 32 yrs (1990-12-08)

Email sample@sample.com

Send to EHR

BACK OK

▲ Attachments: Drag pages to change sending order. Caution: Any selected pages will be sent. Hover over pages to verify content before sending.

[Image] [Image] [Image] (+)

Discard **Send**

Sending Faxes Out

6. If you need to fax a document out, you can choose the pages desired and click **Send**. You'll be prompted to add a fax number, then click **ok**. You will then be able to choose a subject, a custom cover sheet and specify the from number. Click **Send** to send the fax.

Compose [X]

Referring Provider
Send fax to 5555555555

Test Fax

Send Coversheet Send as practice

Send paper fax and allow online access
 Just online
 Just paper

Sending Provider: James Smith

Fax Coversheet: Default

From Number: default number

Address To: Individual Business Both

▲ Attachments: Drag pages to change sending order. Caution: Any selected pages will be sent. Hover over pages to verify content before sending.

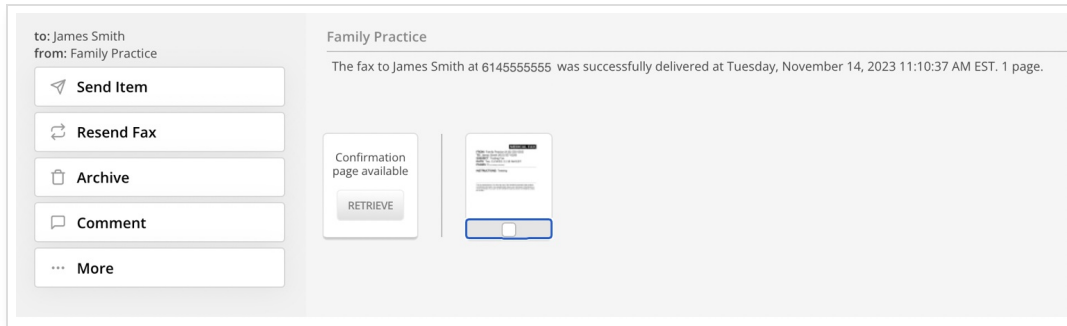
[Image] [Image] [Image] (+)

Discard **Send**

Fax Confirmations

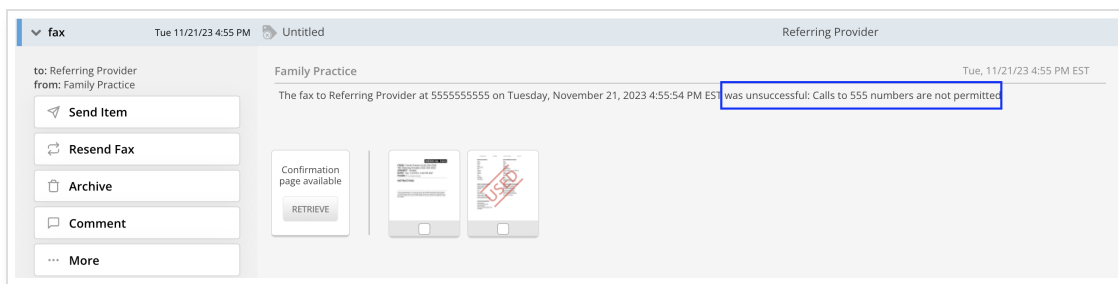
7. Click on the Sent folder to see the status of your fax. If you would like to pull a confirmation page for your

records, click on retrieve. You can also resend the fax quickly if the recipient needs additional copies.



Fax Failures

8. Faxes that fail will appear automatically within your Updox inbox. You'll receive the reason for the failure in the response. You can attempt to resend or type in a new fax number by clicking Send Item.



Did you know?

You can review your practice setting under Menu - Admin - Practice Information. This will be the name and demographics of your practice that are pulled onto cover sheets by default