Getting Started with Fax: What Every Admin Needs to Know

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The Role of an Updox Admin User

As the Admin user responsible for the setup and configuration of Updox, you will be responsible for various tasks. This overview is intended to prepare you for those tasks and what you should consider as you begin the onboarding process. Access to the below items can be found after logging into Updox, click on **Menu**, then **Admin**.

Step 1: How to handle your existing fax lines.

Before getting started, you should consider what you will do with your existing fax lines. Consider one of the following options: forwarding or porting. We can help you with either option. Review our Forwarding v. Porting article here.

Step 2: User Creation

Determine who will need access to Updox and decide on usernames. If you using an integration with your E.H.R., you will also need to connect their EHR usernames to their Updox username to import into the patient chart. Review our guide on user creation.

> **Tip:** Use email address for usernames. This is easy to remember and will allow the user to easily change their password if they forget.

Step 3: Think about ways to organize the Updox Inbox with queues and tags

Queues are a powerful feature that allow you to assign incoming documents based on their purpose. If your practice has multiple fax lines and designate those fax lines for a specific purpose, such as Rx refills or Medical Records inquiries, you could auto route these faxes to those queues. This provides many benefits:

- Saves time: the routing of these documents is automated

- Provides staff notifications: when a document is routed to a queue, the users assigned to that queue can be notified via email or text to their cell phone.

Related Article: How to: Set-up queues.

Tags are a visual splash of color that will draw your attention without needing to read the subject or open the item. You can even limit which items are shown in your workspace by filtering according to the tag color.

Related Article: How to: Set-up tags.

> **Tip:** Think about your customer document triage workflow as a good template for creating your tags.

Other Things to Consider:

- **Do you want to upload signatures?**
  - Find out how here.
- **Do you want to include custom fax cover sheets?**
  - You can have as many fax cover sheets as you need and customize them. This would include your default practice cover sheet as well as fax cover sheets you may want to customize for specific purposes.
- **Templates can be very useful.**
  - A Template is sample text that can be used as a time saver for routine communications. Think about those documents you frequently send and determine if you can create a standard template that could be used each time you send that document.
- **Verify your practice information.**
  - Review your Practice information to make sure the contact information is correct.
  - Go to **Menu >Admin > Practice Information** to review.