

Fax Coversheets

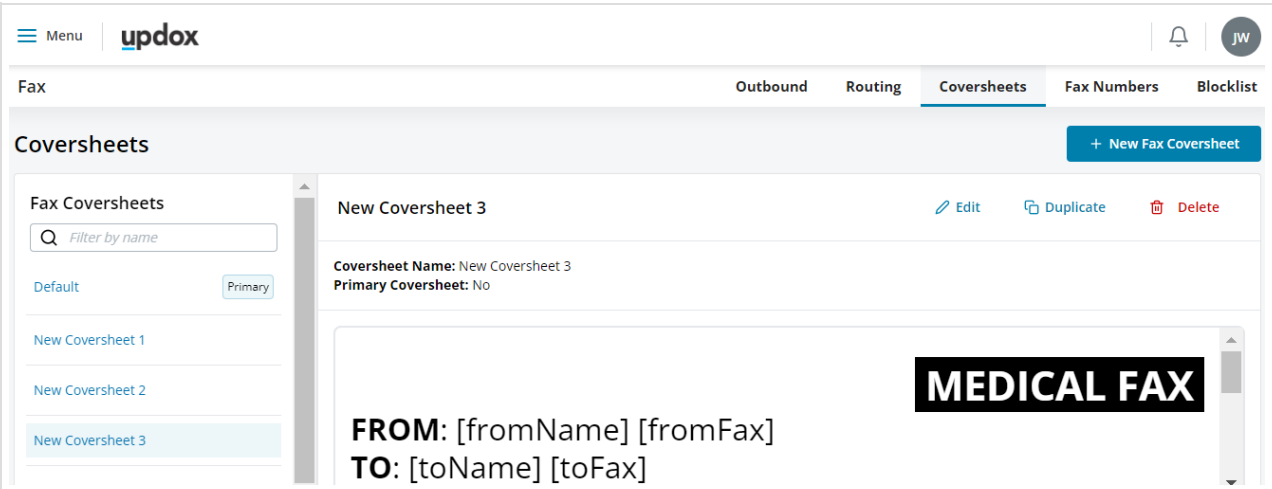
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Fax Coversheets

Overview

Our fax product gives you the ability to customize and manage your fax coversheets.

Fax Coversheets can be accessed by going to **Menu > Admin > Fax Coversheets** (for Admins only) or by going to **Home > Outbound Faxes** and clicking on the **Coversheets** tab.



The screenshot shows the Updox web interface for managing Fax Coversheets. At the top, there is a navigation bar with a 'Menu' icon, the 'updox' logo, a notification bell, and a user profile icon labeled 'jw'. Below this is a secondary navigation bar with tabs for 'Fax', 'Outbound', 'Routing', 'Coversheets' (which is active), 'Fax Numbers', and 'Blocklist'. The main content area is titled 'Coversheets' and includes a '+ New Fax Coversheet' button. On the left, there is a sidebar for 'Fax Coversheets' with a search bar and a list of coversheets: 'Default' (marked as 'Primary'), 'New Coversheet 1', 'New Coversheet 2', and 'New Coversheet 3'. The main view shows the details for 'New Coversheet 3', including 'Edit', 'Duplicate', and 'Delete' actions. The 'Coversheet Name' is 'New Coversheet 3' and the 'Primary Coversheet' is 'No'. The coversheet content area displays a large black box with the text 'MEDICAL FAX' and the following fields: 'FROM: [fromName] [fromFax]' and 'TO: [toName] [toFax]'.

Admins can create, edit, duplicate, and delete (coming soon) fax coversheets. Non-admins can only view existing fax coversheets.

Creating and Modifying Coversheets

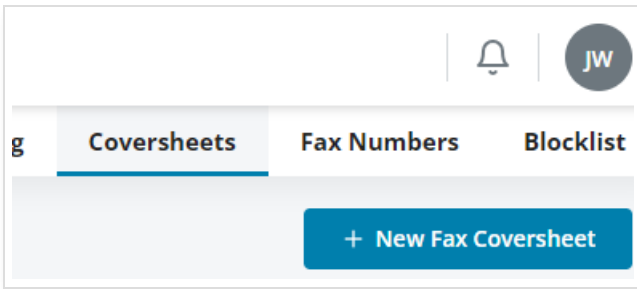
Updox Default

Updox provides a Default coversheet to help you get a quick start. The Default coversheet cannot be edited or deleted. The only modification allowed is to make it the primary coversheet.

Note: If you choose not to create any custom coversheets, the Default will be used for all outbound faxes.

Custom

If you want to create your own custom coversheet, simply click **+ New Fax Coversheet**.



Give your coversheet a name (you can't have duplicate coversheet names within a practice) and then format and personalize your message using the formatting toolbar and list of variables. Coversheet variables automatically fill in based on system data. For example, if you add [currentdate] to a coversheet, it will auto-populate today's date when sending the fax.

New Fax Coversheet
↶ Reset to default
⋮
Cancel
Save

Coversheet Name*

Primary Coversheet

↶ ↷ B I U S | ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷ | - ☒ T Size ▾

FROM: [fromName] [fromFax]

TO: [toName] [toFax]

SUBJECT: [subject]

DATE: [currentDate]

PAGES: [totalPages] (not including coversheet)

INSTRUCTIONS: [instructions]

MEDICAL FAX

Personalize your Message

Use the variables below to personalize your coversheet. Variables will always appear in English.

- [fromName]
Jacob Waller
- [fromFax]
(614) 953-3145
- [fromTel]
(614) 294-9798
- [fromLocation]
Premier Family Health
spongeb0b krusty kr4b
- [toName]
- [toFax]
- [title]
- [subject]
- [instructions]

Tip: Many of the variable tokens will pull directly from your Updfox information:

- **[fromName]:** Full name for the sending user as it appears in Updfox.
- **[fromFax]:** Fax number as it is listed in Admin - Practice Settings.
- **[fromTel]:** Main number as it is listed in Admin - Practice Settings
- **[fromLocation]:** Only applicable if multiple locations is supported for your account. If supported, it will show the location name instead of the Updfox account name.
- **[toName]:** Name of the contact as it appears in the Updfox Address Book.
- **[toFax]:** Fax number associated with the contact in the Updfox Address Book.
- **[doctorName]:** This is only applicable if your account is tied to an integrated EMR. The dropdown will appear when sending the fax.

If you want to make the coversheet the primary one used for your faxes, check the **Primary Coversheet** checkbox.

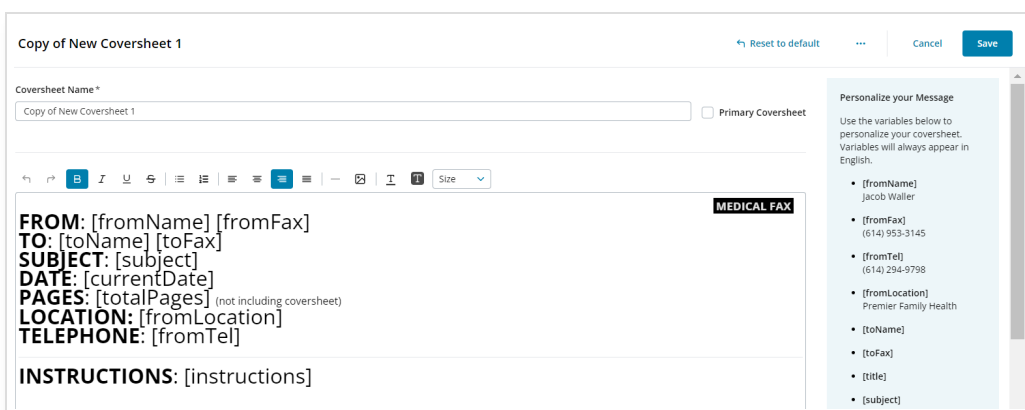
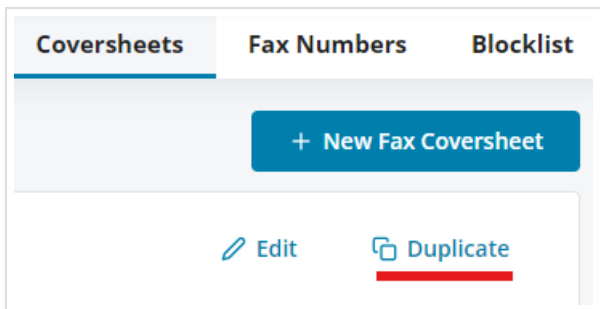
Primary Coversheet

Making a coversheet primary means that it will be the coversheet used for all outbound faxes, unless a different coversheet is chosen at the time of sending. Only 1 coversheet can be primary. The primary coversheet cannot be deleted. Before deleting a primary coversheet, choose a different coversheet to be the primary first.

When you are done creating or editing your coversheet, click **Save**.

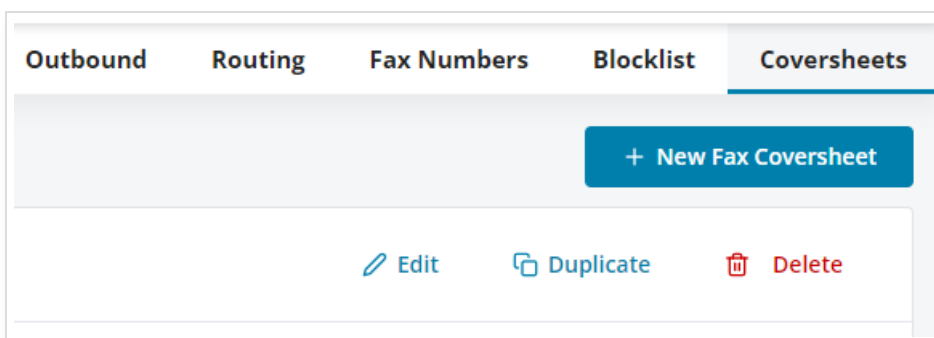
Duplicating Coversheets

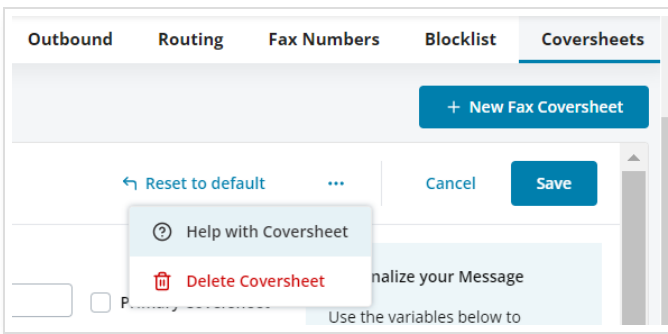
If you want to create a new custom coversheet that is only slightly different than an existing one, you can save time but duplicating the existing coversheet. When you click **Duplicate** on an existing coversheet, a copy of the coversheet will be displayed in edit mode and you can make changes as you see fit.



Deleting Coversheets

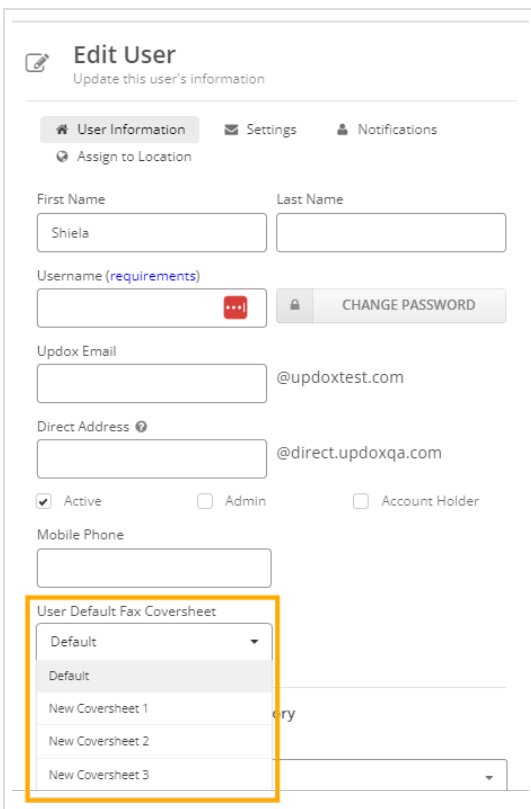
If you decide you no longer want a coversheet, you also have the ability to delete it. Simply click **Delete** inside or outside edit mode (as long as it's not the Default or Primary coversheet).





Assigning a Default Coversheet to a User

To further refine your workflow, Admins have the option to assign default coversheets to each user. This can be done by going to **Menu > Admin > Users**, selecting a user, and choosing the default fax coversheet from the dropdown menu. The default coversheet assigned to the user will be used instead of the practice's primary coversheet. Only one default coversheet can be assigned to a user.



Sending a fax coversheet

Once a coversheet is saved, you can choose your new or edited coversheet from the dropdown list at the time of sending a fax. Choosing a coversheet from this dropdown does not change the default coversheet assigned to the user.

Fax Coversheet

Custom	▼
Dr McCoy	
Pharmacy	
Wendy's Coversheet	
Test Coversheet	

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Message