

Send to EHR: AI Suggestions for Faxes

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[How AI suggestions work](#) | [Send a fax to the EHR with AI suggestions](#) | [Category mapping](#) | [Frequently asked questions](#)

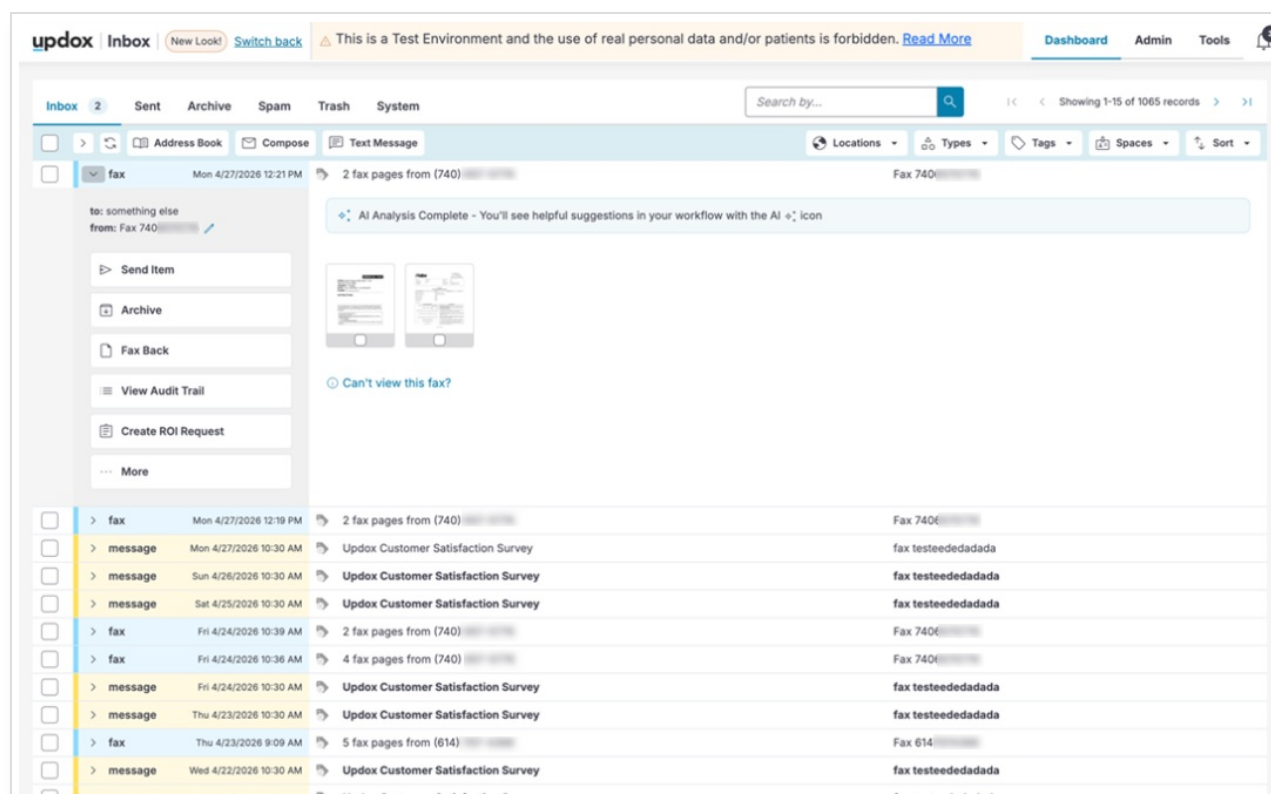
Many communications about a specific patient arrive via fax: test results, consult notes, and procedure summaries. **AI Fax Analyst** reviews inbound faxes and predicts the document type, the patient it belongs to, and the fields needed to send it to the EHR so your staff spends less time filling out the **Send to EHR** form by hand.

How AI suggestions work

Inbound faxes in the **Inbox** show one of three statuses so you know whether to expect AI suggestions:

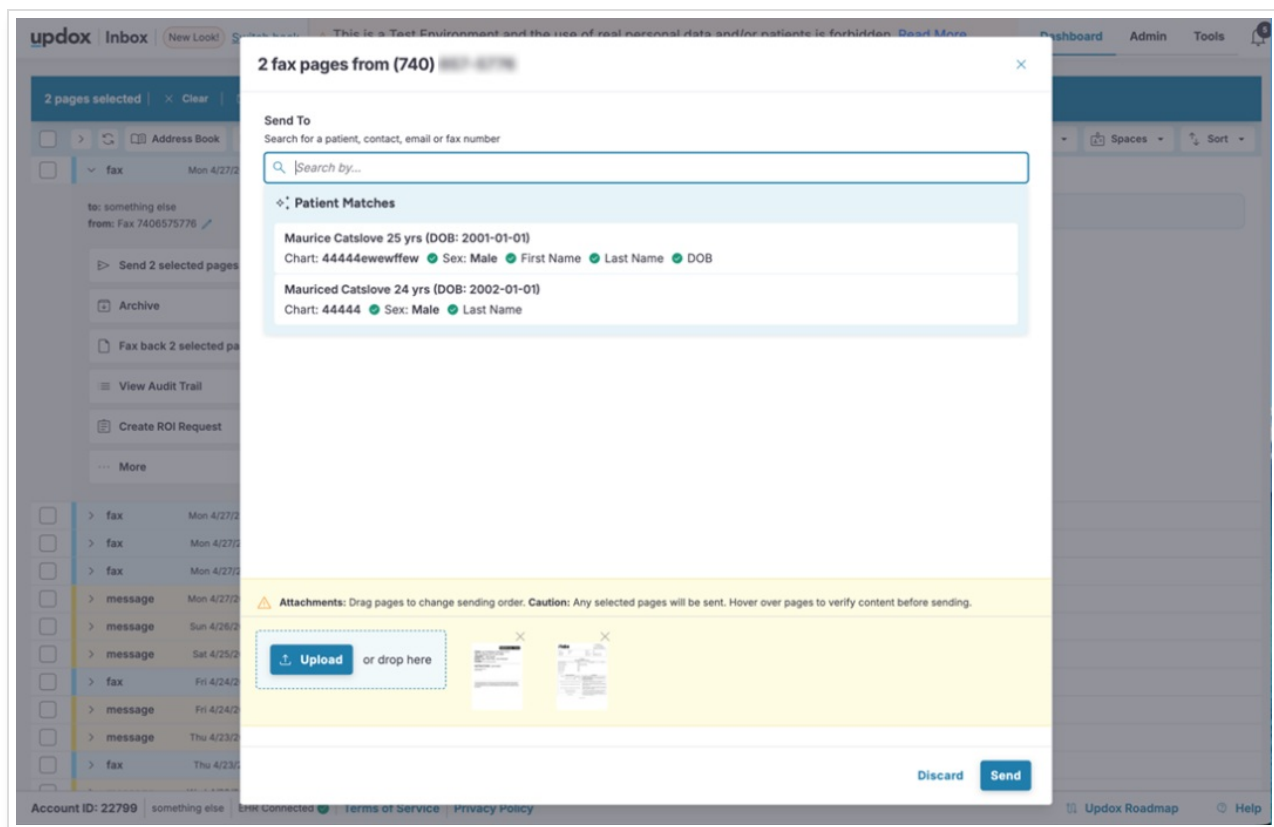
- **AI Analysis Complete:** Suggestions are ready to use
- **Pending:** Analysis hasn't finished yet
- **Unavailable:** No suggestions for this fax

AI Fax Analyst doesn't analyze faxes sent to spam.



When you send a fax marked **AI Analysis Complete**, you see whether **AI Fax Analyst** found any reliable patient matches.

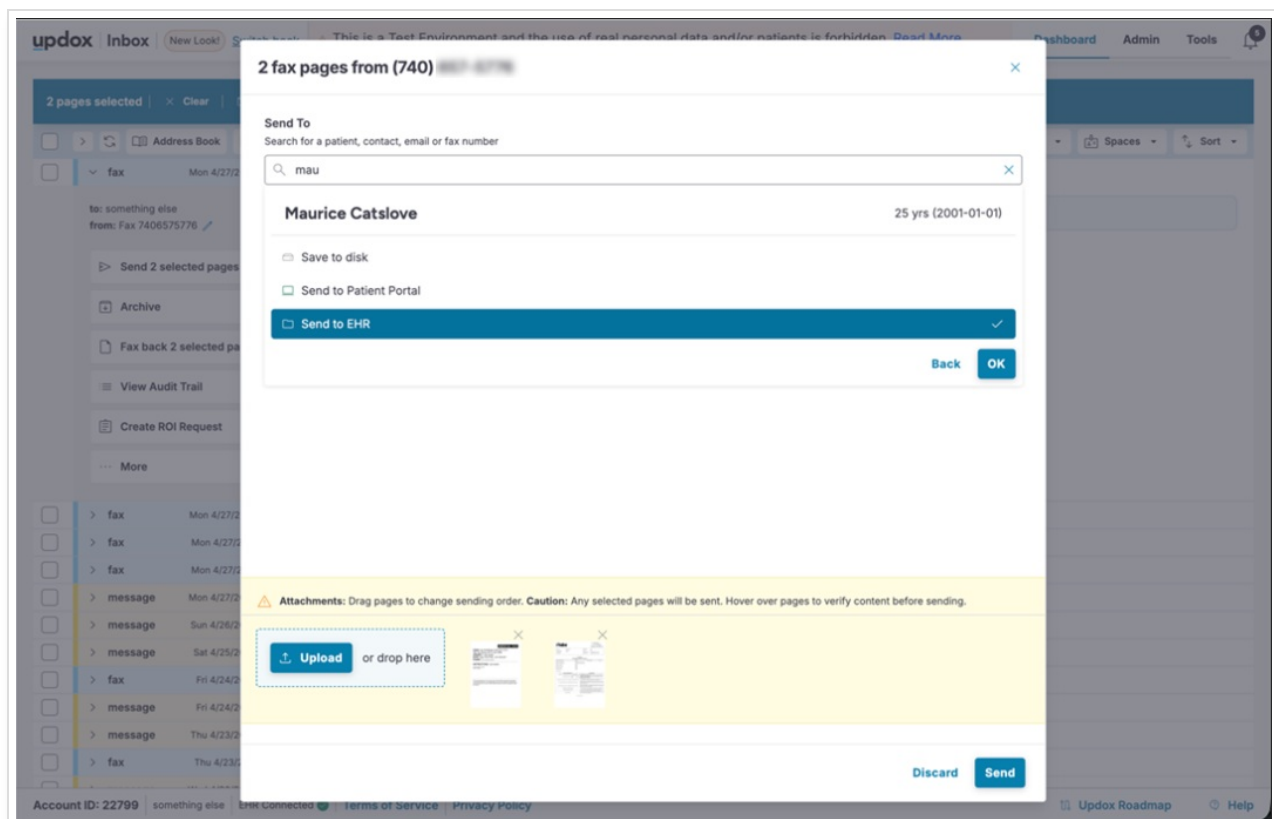
Updox shows up to four patient matches, with the best match listed first. A green check mark appears next to each value **AI Fax Analyst** was able to match. If **AI Fax Analyst** didn't find a match, search the directory for the patient, user, or contact the way you always have.



If you choose to send to a patient, the patient receives the fax the same way as always.

Send a fax to the EHR with AI suggestions

AI Fax Analyst only suggests form field responses when you select **Send to EHR**. AI analysis doesn't affect **Save to disk** or **Send to Patient Portal** options.



If **AI Fax Analyst** finds a confident match, the **Send to EHR** form shows AI suggestions for **Subject**, **Category**, **Notify doctor**, and **Date of item**. Each suggestion includes a **Use AI Suggestion** link.

updox Inbox New Look! This is a Test Environment and the use of real personal data and/or patients is forbidden. Dashboard Admin Tools

2 pages selected | Clear

2 fax pages from (740) 406-4796

Maurice Catslove Send to EHR Male

Subject * 2023-06-24_Laboratory Use AI Suggestion

Category * Laboratory Use AI Suggestion

Notify doctor Pat Mize

Date of item * 06/24/2023 Use AI Suggestion

Additional Contacts or Users

Send To Search for a patient, contact, email or fax number

Addressees Maurice Catslove Sex: Male disk portal **emr** Send to EHR

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

Upload or drop here

Discard Send

Selecting **Use AI Suggestion** places the AI-suggested value into that field. You can still edit the value after selecting the suggestion.

updox Inbox New Look! This is a Test Environment and the use of real personal data and/or patients is forbidden. Dashboard Admin Tools

2 pages selected | Clear

2 fax pages from (740) 406-4796

Maurice Catslove Send to EHR Male

Subject * 2023-06-24_Laboratory

Category * Laboratory

Notify doctor Pat Mize

Date of item * 06/24/2023

Notes * Lab results

Additional Contacts or Users

Send To Search for a patient, contact, email or fax number

Addressees Maurice Catslove Sex: Male disk portal **emr** Send to EHR

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

Upload or drop here

Discard Send

Category mapping

AI Fax Analyst predicts a document type, but your practice still requires a document category for each fax. These are related, but not the same. If a category suggestion doesn't match what you expect, go to **Category Mapping > Admin** tab to edit the link between **Document Category** and **Document Type**. If **AI Fax Analyst** predicted a mapping, it appears as buttons to the right of the **Document Type** dropdown.

The screenshot shows the 'Category Mapping' admin page in the Updox system. It features a sidebar with navigation links and a main table for mapping document categories to document types. A 'Save Mappings' button is in the top right.

My Document Category	Document Type	AI Mapping Suggestions
Batch Import	maps to Advance Directive	No Suggestions
Consult	maps to Consultation Report	Consultation Report
ECG	maps to Disability Form	Lab Result
Hospital	maps to Discharge Summary	No Suggestions
Incoming Correspondence	maps to Patient Referral	No Suggestions
Laboratory	maps to Lab Result	Lab Result
Non-Medical Info (no Sign-Off required)	maps to Insurance Verification	No Suggestions
Operative Report	maps to Surgical Report	Surgical Report
Other	maps to	No Suggestions
Outgoing Correspondence	maps to Medical Necessity Letter	No Suggestions
Pathology	maps to	Lab Result

Updox document types

- Advance Directive
- Consultation Report
- Discharge Summary
- DME Order
- HIPAA Release Form
- History and Physical
- Immunization Record
- Insurance Verification
- Lab Result
- Legal Compliance Notice
- Medical Necessity Letter
- Medication List
- Patient Billing Doc
- Patient Referral
- Patient Work Related Doc
- Prior Authorization Docs
- Progress Note
- Radiology Report
- Surgical Report
- Workers Compensation Doc
- Unknown

Frequently asked questions

What about documents other than faxes?

Right now, **AI Fax Analyst** only analyzes inbound faxes that aren't sent to spam.

What if I accidentally select faxes for two different patients?

If **AI Fax Analyst** finds strong matches, you see AI suggestions for both patients.

This isn't a new patient, but AI Fax Analyst didn't find a match. Why?

AI Fax Analyst matches patients against the patient details stored in Updox, practice management system (PMS), radiology information system (RIS), EHR, or other outside systems.

The fax shows AI Analysis Complete, but not all the fields have a suggestion. Why not?

AI Fax Analyst didn't get a high-confidence result for that field, so we didn't suggest one.

What if I select Use AI Suggestion and then need to change it?

You can edit the field at any time, even after selecting the suggestion.

What if the status is Pending or Unavailable?

You can still send those faxes to the EHR. Sending works the same way it did before **AI Fax Analyst** was available for that item.

What happens if I select two inbound faxes with AI Analysis Complete before opening the compose wizard?

Both. **AI Fax Analyst** assesses the AI analysis results for every file you select before sending to the EHR, and shows the highest confidence-rated results as suggestions.
