



 escribeHOST



Faxing



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# 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**.



Document	DOS	Date Scanned	Provider	Status
Office Note	06/16/2020		DebraAx Aberdale NP	✓ Signed 06/17/2020
Office Note	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/21/2020
Transesophageal Echo (TEE) with Cardioversion	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/21/2020
Office Note	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/15/2020

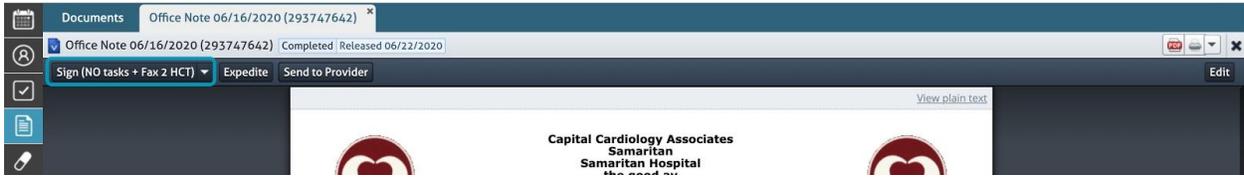
Select the document you wish to sign and fax.



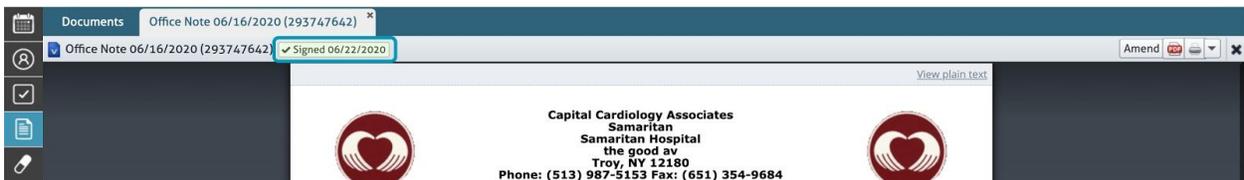
Document	DOS	Date Scanned	Provider	Status
ICD 10 Conversion Summary	10/04/2015		Hasan Atalay MD, FACC	Completed
Blank Note	12/18/2013		Ashraf Seedhom MD, FAAC	✓ Signed 12/23/2013

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.



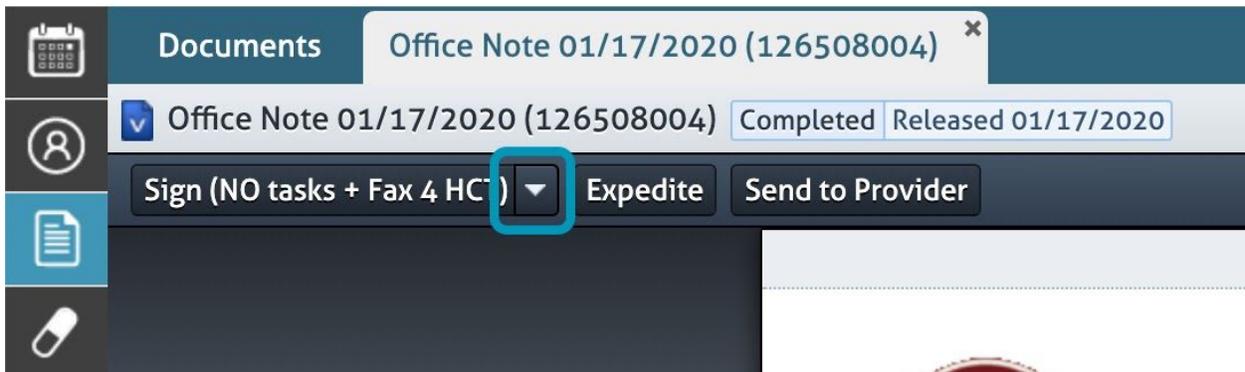
A **Signed** green ribbon with date signed will display on top of the document.



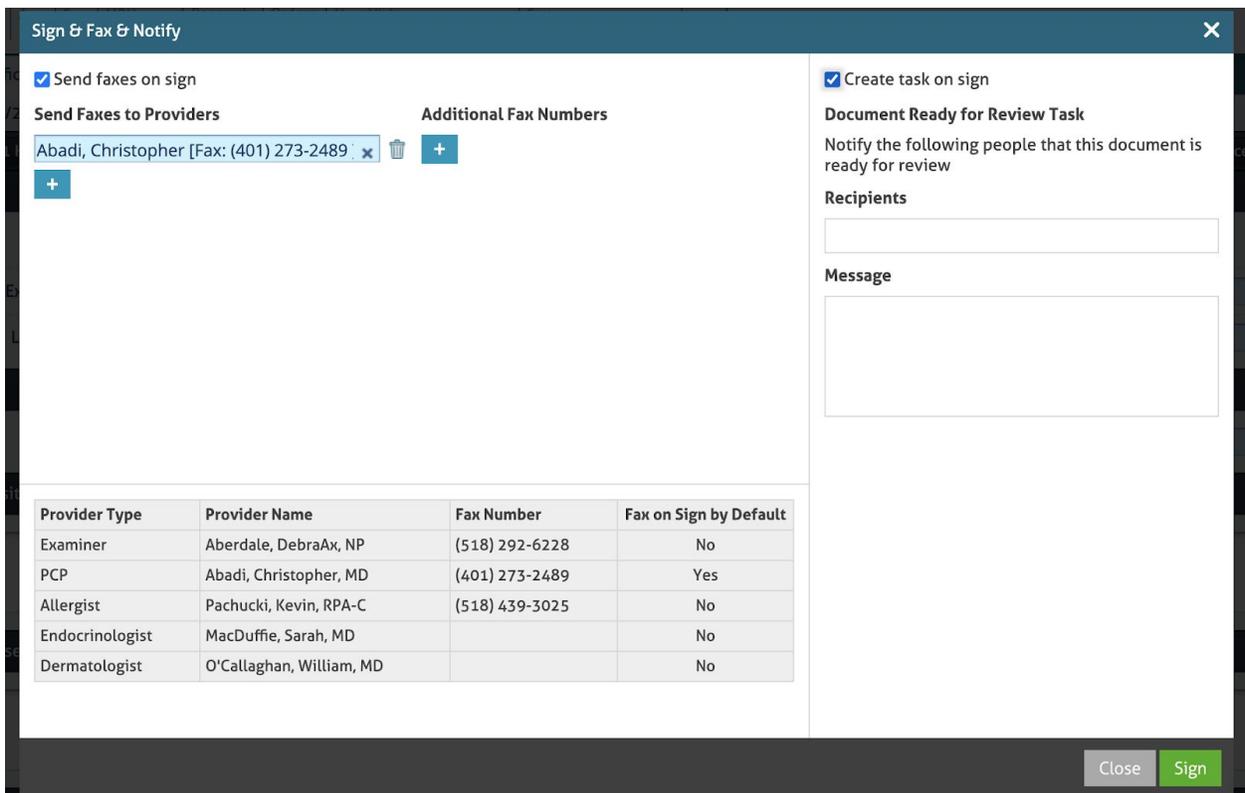
## Sign & Fax & Notify with popup (custom recipients)

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.

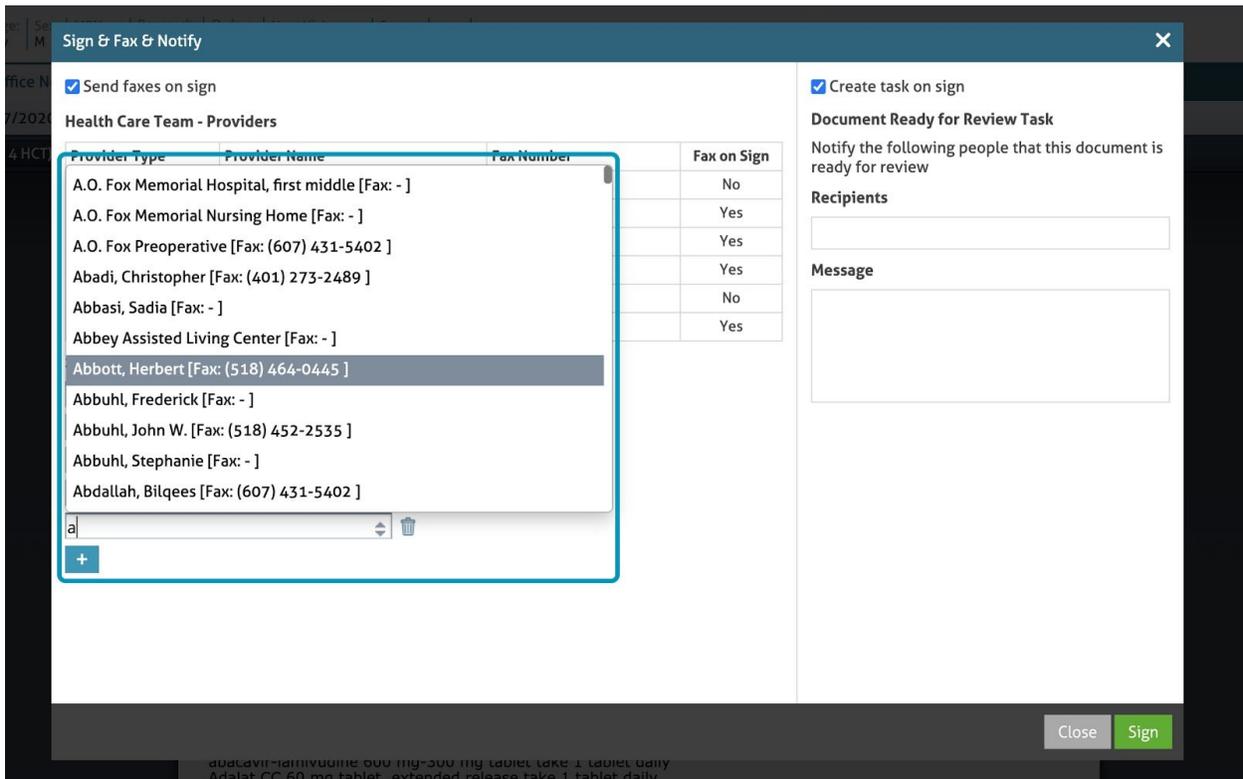


A popup will display. Review the recipients under **Send Faxes to Providers**. The default recipients are set to all Health Care Team Providers with fax numbers that also have Fax-on-Sign set to Yes.

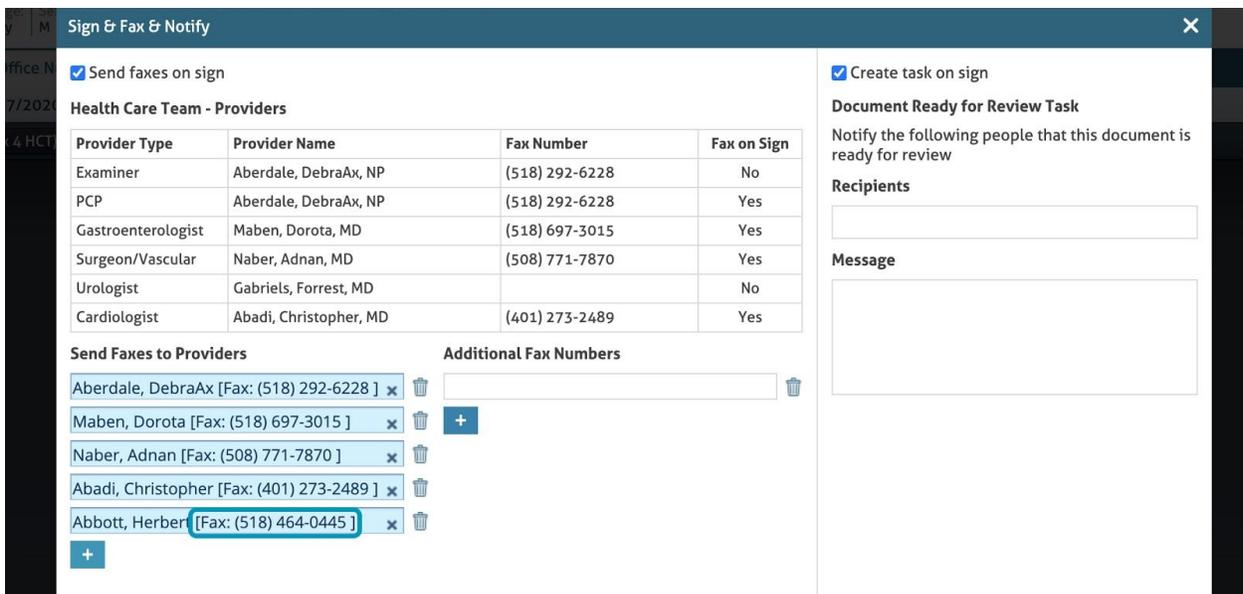


Click the **trash icon** to the right of providers to remove them as recipients.

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**.

**Sign & Fax & Notify**

Send faxes on sign

**Health Care Team - Providers**

Provider Type	Provider Name	Fax Number	Fax on Sign
Examiner	Aberdale, DebraAx, NP	(518) 292-6228	No
PCP	Aberdale, DebraAx, NP	(518) 292-6228	Yes
Gastroenterologist	Maben, Dorota, MD	(518) 697-3015	Yes
Surgeon/Vascular	Naber, Adnan, MD	(508) 771-7870	Yes
Urologist	Gabriels, Forrest, MD		No
Cardiologist	Abadi, Christopher, MD	(401) 273-2489	Yes

**Send Faxes to Providers**

- Aberdale, DebraAx [Fax: (518) 292-6228 ] x
- Maben, Dorota [Fax: (518) 697-3015 ] x
- Naber, Adnan [Fax: (508) 771-7870 ] x
- Abadi, Christopher [Fax: (401) 273-2489 ] x
- Abbott, Herbert [Fax: (518) 464-0445 ] x
- +

**Additional Fax Numbers**

(508) 678-1234

+

Create task on sign

**Document Ready for Review Task**

Notify the following people that this document is ready for review

**Recipients**

**Message**

Close 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.

**Sign & Fax & Notify**

Send faxes on sign

**Health Care Team - Providers**

Provider Type	Provider Name	Fax Number	Fax on Sign
Examiner	Aberdale, DebraAx, NP	(518) 292-6228	No
PCP	Aberdale, DebraAx, NP	(518) 292-6228	Yes
Gastroenterologist	Maben, Dorota, MD	(518) 697-3015	Yes
Surgeon/Vascular	Naber, Adnan, MD	(508) 771-7870	Yes
Urologist	Gabriels, Forrest, MD		No
Cardiologist	Abadi, Christopher, MD	(401) 273-2489	Yes

**Send Faxes to Providers**

Aberdale, DebraAx [Fax: (518) 292-6228] x

Maben, Dorota [Fax: (518) 697-3015] x

Naber, Adnan [Fax: (508) 771-7870] x

Abadi, Christopher [Fax: (401) 273-2489] x

Abbott, Herbert [Fax: (518) 464-0445] x

**Additional Fax Numbers**

(508) 678-1234

Create task on sign

**Document Ready for Review Task**

Notify the following people that this document is ready for review

**Recipients**

Cindy Putorti x

**Message**

This document is ready to review.

Close Sign

abacavir-ritonavir 600 mg-500 mg tablet take 1 tablet daily  
Adalat CC 60 mg tablet, extended release take 1 tablet daily

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.

The screenshot shows a dialog box titled "Sign & Fax & Notify" with a close button (X) in the top right corner. A red banner at the top left indicates "Errors (3)".

**Errors (3)**

1. Must have at least one task recipient in order to Create Task on Sign.
2. The following providers do not have a fax number, or are not configured to accept faxes:  
Sabater, Pilar, MD [ID: 106733]
3. At least one of the additional fax numbers is empty.

Send faxes on sign

**Health Care Team - Providers**

Provider Type	Provider Name	Fax Number	Fax on Sign
Examiner	Dearstynne, Nancy		No
PCP	Atalay, Hasan K., MD, FACC	(518) 292-6200	Yes
Cardiologist	Fabian, Thomas, MD	(518) 262-9778	Yes
Cardiologist	Fabian, Thomas, MD	(518) 262-9778	Yes

**Send Faxes to Providers**      **Additional Fax Numbers**

Sabater, Pilar [Fax: - ]

Create task on sign

**Document Ready for Review Task**

Notify the following people that this document is ready for review

**Recipients**

**Message**

Close

## 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.



Document	DOS	Date Scanned	Provider	Status	
Office Note	06/16/2020		DebraAx Aberdale NP	✓ Signed 06/17/2020	  
Office Note	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/21/2020	  
Transesophageal Echo (TEE) with Cardioversion	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/21/2020	  
Office Note	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/15/2020	  

Select the **Send Fax** option from the dropdown list.



Review and edit the recipients if necessary.

**Fax Document** ✕

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**Send Faxes to Providers** **Additional Fax Numbers**

Abadi, Christopher [Fax: (401) 273-2489 ] ✕ 🗑️ +

+

**Fax Cover Page Comment**

Provider Type	Provider Name	Fax Number	Fax on Sign by Default
Examiner	Aberdale, DebraAx, NP	(518) 292-6228	No
PCP	Abadi, Christopher, MD	(401) 273-2489	Yes
Allergist	Pachucki, Kevin, RPA-C	(518) 439-3025	No
Endocrinologist	MacDuffie, Sarah, MD		No
Dermatologist	O'Callaghan, William, MD		No

Cancel Fax

**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.

**Send Faxes to Providers**

Aberdale, DebraAx [Fax: (518) 292-6228 ] x

Maben, Dorota [Fax: (518) 697-3015 ] x

Naber, Adnan [Fax: (508) 771-7870 ] x

Abadi, Christopher [Fax: (401) 273-2489 ] x

+

**Additional Fax Numbers**

+

**Fax Cover Page Comment**

Cancel Fax

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

Abadi, Christopher [Fax: (401) 273-2489 ] x

+

**Fax Cover Page Comment**

Cancel 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.



The screenshot shows a table with columns: Document, DOS, Date Scanned, Provider, and Status. The first row is selected, and a dropdown menu is open on the right side of the row, showing options like Print, PDF, and Fax History.

Document	DOS	Date Scanned	Provider	Status
Office Note	06/16/2020		DebraAx Aberdale NP	✓ Signed 06/17/2020
Office Note	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/21/2020
Transesophageal Echo (TEE) with Cardioversion	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/21/2020
Office Note	06/15/2020		DebraAx Aberdale NP	In Progress Released 06/15/2020

Select the **Fax History** option from the dropdown list.



The screenshot shows the same table as above, but with a dropdown menu open on the first row. The 'Fax History' option is highlighted in the dropdown list.

Document	DOS	Date Scanned	Provider	Status
Cardio-Oncology	06/17/2020	06/17/2020	DebraAx Aberdale NP	Completed
Cardio-Oncology	06/17/2020	06/17/2020	DebraAx Aberdale NP	Completed
Office Note	05/27/2020		DebraAx Aberdale NP	In Progress
Office Note	05/20/2020		DebraAx Aberdale NP	✓ Signed 06/15/2020
Office Note	05/20/2020		DebraAx Aberdale NP	✓ Signed 06/01/2020
Office Note	05/20/2020		DebraAx Aberdale NP	✓ Signed 05/20/2020
Blank Note	05/14/2020	05/15/2020	DebraAx Aberdale NP	Completed
Office Note	05/13/2020		DebraAx Aberdale NP	✓ Signed 05/13/2020
Office Note	05/08/2020		DebraAx Aberdale NP	✓ Signed 06/08/2020

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.

Recipient	Fax Number	Creation Date	Status	Failure Details	Date of Sending
Thomas Fabian MD	(518) 262-9778	06/22/2020 3:42 PM	Sent		06/22/2020 9:43 AM
Hasan Atalay MD, FACC	(518) 292-6200	06/22/2020 3:42 PM	Sent		06/22/2020 9:44 AM
Thomas Fabian MD	(518) 262-9778	06/22/2020 3:03 PM	Sent		06/22/2020 9:06 AM
Hasan Atalay MD, FACC	(518) 292-6200	06/22/2020 3:03 PM	Sent		06/22/2020 9:05 AM
Thomas Fabian MD	(518) 262-9778	06/22/2020 3:00 PM	Sent		06/22/2020 9:04 AM
Hasan Atalay MD, FACC	(518) 292-6200	06/22/2020 3:00 PM	Sent		06/22/2020 9:03 AM
Thomas Fabian MD	(518) 262-9778	06/22/2020 3:00 PM	Sent		06/22/2020 9:01 AM
Hasan Atalay MD, FACC	(518) 292-6200	06/22/2020 3:00 PM	Sent		06/22/2020 9:02 AM
Thomas Fabian MD	(518) 262-9778	06/17/2020 6:13 PM	Sent		06/17/2020 12:16 PM
Thomas Fabian MD	(518) 262-9778	06/17/2020 6:13 PM	Sent		06/17/2020 12:14 PM
Hasan Atalay MD, FACC	(518) 292-6200	06/17/2020 6:13 PM	Sent		06/17/2020 12:15 PM

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

Recipient	Fax Number	Creation Date	Status	Failure Details	Date of Sending	MQ Message Details
DebraAx Aberdale NP	(518) 292-6228	05/20/2020 9:35 AM	Failed	failure processing MQFaxMessage <a href="#">Show more</a>		<a href="#">MQ Message Details</a>
DebraAx Aberdale NP	(518) 292-6228	05/20/2020 9:35 AM	Failed	failure processing MQFaxMessage <a href="#">Show more</a>		<a href="#">MQ Message Details</a>

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