SuccessEHS Fax Procedure

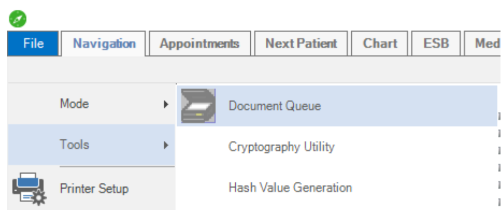
Outlines the proper process for processing incoming faxes in the SuccessEHS system

Incoming faxes are sent directly to the **Document Queue** inside SuccessEHS and must be sorted, printed (if necessary), and sent to each Provider for review. Incoming faxes are a major priority in managing the **Document Queue** to ensure that all new information is given to the Providers in a timely manner.

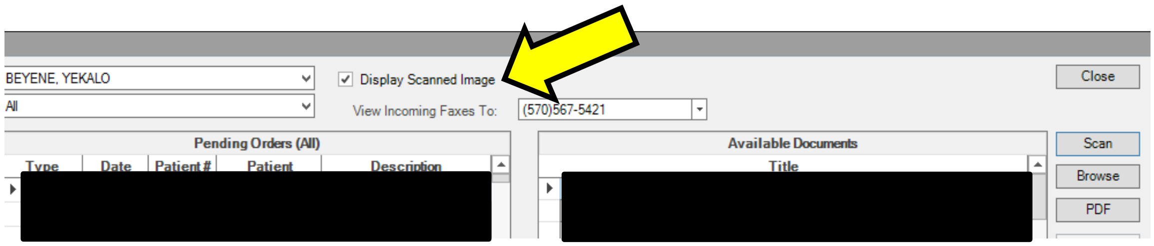
Reviewing/Naming

1. Open the **Clinical Console** Module

2. Click on **File** in the top menu ribbon, then choose **Tools → Document Queue**



3. Once in the **Document Queue**, uncheck **Display Scanned Image** and ensure that you are on the correct **View Incoming Faxes To:** number. **Medical Faxes: 570-567-5421** and **Dental Faxes 570-567-5431**

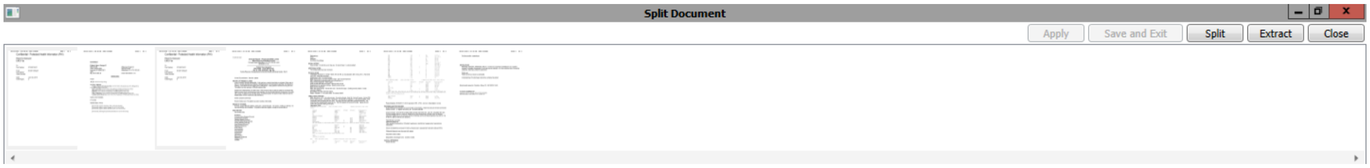


4. In the menu options on the right-hand side of the **Document Queue**, select **Get Faxes**. This function pulls any faxes that are sitting out on the server. **Note: The GET FAXES button should be selected frequently throughout the course of the day to ensure that all incoming faxes are appropriately handled on a timely basis.**

5. Should a fax need to be printed, which would be any Rx requests or documents that require a signature (i.e. – Physical Therapy, Nurse Triage Calls, DME Requests, etc.) print the document immediately, then save as **Delete.** Once completed with printing faxes, verify that everything printed then highlight those marked delete and select **Delete**

6. When reviewing faxes, all incoming faxes must be named, using the naming convention outlined below, before being attached to the patient's chart and sent to the Provider for review. To name each fax select the document you are going to name by highlighting the row and either **double-click** or select **view** and then save the document using the appropriate naming convention below. **Remember to check that all pages in the fax are for the same patient, as we have some organizations that will combine patient information into one bulk fax.**

7. After naming the fax you must **"extract"** the pages that are not needed in the patient chart (i.e. – the fax cover sheet). To do this you need to select the document you need to extract pages from by highlighting the row and either **double-click** or select **view**. In the **"page view"** bar click the page that needs to be deleted. Note – you can select multiple pages using the **Ctrl** key and **Left-Click once**. After all pages have been selected choose **Extract** (ensure **Delete Pages After Extracting** is checked) → **OK** → **Save and Exit**



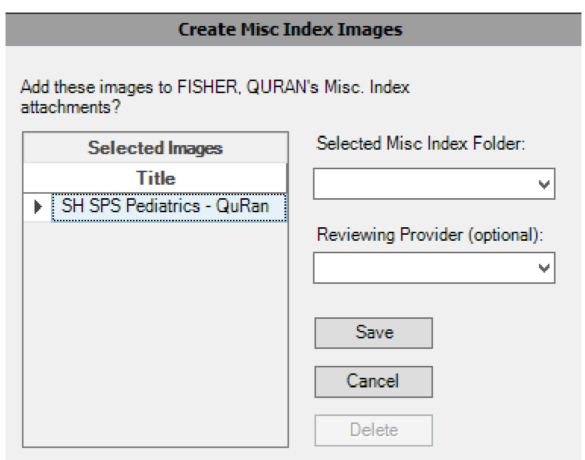
8. After extracting pages from the fax you will get 2 documents that will appear with the same name. View the documents to find the extracted pages that are not needed. Once you find them, re-save the document as **Delete**. Once back in the document queue, delete the item named **Delete**.

<u>Attaching</u>

1. When ready to attach the faxes, **remember that every fax needs to be either linked to an order or sent to a Provider for Review** if using the **Misc. Index** button

2. If the document could potentially have an **Order** to attach to (i.e. – Consults, Labs, Radiology, etc.) then you must look up the patient's information using the **Pending Orders** section in the **Document Queue** before attaching to the patient's chart. Search out the **Ordering Provider** using the drop down menu in the top left corner of the **Document Queue**, then search for the patient and look for the order. Should you find the correct order, select the order from the **Pending Orders** side and also select the document from the **Available Documents** side of the **Document Queue** and then select **Link**. This will link the result to the order that is in the patient's chart and send it to the Provider under the **Orders to Sign Off** tab

3. If there is no order or the document simply would not have an order (i.e. – a physical form, prescription, etc.) then you will select the document from the **Available Documents** section and choose **Misc. Index**. Search for the patient and select **OK**. The **Create Misc Index Images** window will appear, choose the appropriate **Selected Misc Index Folder** from the drop-down menu and choose the appropriate **Reviewing Provider** from the drop-down menu then click **Save**. This will place the document in the patient's chart and send the document to the Provider's **Documents for Review**



Naming Convention

- All documents must be labeled as follows:
    - **Document Title – Patient First and Last Name – Provider Initials**
    - For example: Old Records – Sam Zztest – RK
    - *Note: If the provider name is not on the document, you must look up the PCP in* ***patient administration***

- If the document contains labs, radiology, pathology you must spell out what tests were completed
    - For example: CBC, Lipid, TSH – Sam Zztest – RK

- ER reports should state the date of the ER visit in the Title