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Purpose:

The purpose of this document is to cover all aspects of E-Faxing within IntelleChart Pro.

Overview for E-Faxing within IntelleChartPro

IntelleChartPro E-Fax Setup

- The practice management system or IntelleChartPro can keep the records for the referring provider contacts.
- The practice management system can be integrated with IntelleChartPro to send and receive contact information. (Including the fax number)
- Each patient can have primary and referring providers assigned to them.
- After completing a patient encounter, the referral letter can be automatically sent to the referring provider's fax listed in the contact list.
- A third-party faxing system by Concord Technologies provides IntelleChartPro with an API that is used to fax the letter to the referring provider.
- IntelleChartPro has an internal fax log that tracks each fax that is sent.

Steps for setting up a Referring Physician to fax to

ine Doe2545 2/2/1929 89	y.o. 2346 Test		
Referring: Not Provided	Coy	say: Not Provided	Insurance: Not Provide
Chart Summary			P.
	COERDA UNITS INVE TOTATION INTO A INVESTIGATION C J. DOLD X 1993 TOTATION INTO INTO IN UNIT AND INTO INTO INTO INTO INTO INTO INTO INTO	er oppendig hilfer ingege der ders sonder biskungsman (sond sinder info er oppendig hilfer inder sonder der einer sonder biskungsman (sond sinder information) er oppendig interviewer inder sonder information (sonder information)	
Encounter Summary			
Get All 3/20/2018 C	HPIPeloaded Chart 🔹 🔽 🧿		Sammary Provident Print
· PRIMARY Myope	c Choroidal Neovascularization OD. Myopic Degeneration OU.	FOLLOW UP: Dr. Park 4 Weeks - Exam. OCT Macuta OU. Possible Lucentis 0.5mg PFS OU.	
	SIT Prekaded Chart -	 OCULAR MEDS: Preservision AREDS 2 Sofget 1 tablet bid by mouth. 	
HPLCC Blured	Vision OD > OS. Since Last Visit: no changes noted. Location: central vision. Quality dry OU. Severity mild: Timing	PROCEDURES: Lucentis 0.5mg PFS #1 OO. PRP-10 OS	
VA OD Der2040	n onserveggavation inoning specific notes. Associated symptoms induitis, no labores co-	 DISCUSSION: Patient understands condition, prognosis and need for follow up care. Advised regular use of immediately if ever pain or loss of vision. Discussed AREOS2 supplements. IIP control and a healthy det inc. 	Amsler grid. Advised to call Juding sources of lutein and
+ VA OS: Doc2000		omega-3 faily acids intravitreal anti-VEGF therapy was recommended. Advised to call immediately if any we	orsening distortion or bluming is
		noted. Discusser task and detiminitial effects of snoking. Discussed need for timely follow up and need to Polieti understands that but kork of appropriate follow up may missi the permanent vision. So Diatelets, Type II Insulin Dependent, No evidence of Diabetic Retinopathy. Discussed the importance of blood sogar and bloot the INATC < 6.5%.	keep future appointments No Ocular Complications, Not d pressure control and keeping
Integration Links			
TeanWewer Commu	nty Portal		

• Open the patient summary page



• Open the Demographics Section from the Summary Page

Jane Doe2345 2/2/1929 89 y.o. 2345Test						01	6 🗖 🖷
Patient - Procedures Shared Care -							
Referring: Not Provided			Copay: Not Provided			Insurance: N	ot Provided
Demographics							Save
Primary Information		Identifying Information			Contact Information		
Last Name: Doe2345	Suffic	Gender: @ Male @ F	iemale 🔍 Unknown		Home Phone: (222)333-4444		
First Name: Jane	MI:	Receipt White x			Mobile Phone:		_
Tide:	•	Ethelcitylest: Not Hispanic	: or Latino ×		Work Phone:		_
Occupation:		Servel Orientation		•	Other Phone:		_
SSN: vvv.vv.2222	May Edt	Gender Identity:			Secure Email:		-
Chart Number 2345Test	100 500				Preference: Home Phone		
Opt Status: Opt Status		Birth Information	And State	Minor			
Test Patient: 🖌 (Exclude from reports and in	ntegrations)	of the second second					
Death Information							
D00:	Cause Of Death:						
Address Information							
Street 1	Street 2	City	State	Zip	Status		
222 Pennsylvania Street		Lebanon	PA	22222	Primary		
Emergency Contact Information							
Name	Phone 1	Phone 2		Relationship/Commen	:		
							Delete
Add							
Other Name Information							
Name Type	First Name Type	First Nam	•	Last Name Type	Last Name		
Notes							_
Contact Notes OK to talk to: son Bob							
Referral Type:	• B	eferral Note:					
Doctors							
Doctor	Address	Specialty	Phone		Fax	RPLC	
MDI					727-408-5156		Delete
Τ							2 mar

- Scroll to the bottom of the page and add a referring physician to the doctor's section. Check R, P, L or C and click Save. (R=Referring Physician, P=Primary Care, L=Letter, C=Copy) An L or C must be checked for the fax to be sent.
- The referring Doctor list comes from the contacts list in Admin/Practice Data/Contacts/Contacts Search. The contacts are entered within the Practice Management System and passed to IntelleChartPro.

dmin My Sett	tings Practice Data Practice Settings	Knowledge Base MDI Admin		
	Faxes Contacts Logs Patients Other L	ists CMS Regulatory Reports Alerts Reports		
Save Cancel De	elete			
me		7		
anc		Location		
Title:		Practice Name:		
*First Name:	MDI		Communication	
Middle Name:		Address 1:	consident action	
*Last Name:	MDI	Address 2:	Email:	
Suffix:		City:	Secure Email:	
Degree:		State:	Home Phone:	
Specialty:		Zip:	Mobile Phone:	
*Display As:	MDI	Country:	Business Phone:	
Address As:			Fax Number:	727-408-5156
tra				
Job Title:				
Web Page:				
Notes:				



• The Letter, Chart Note, Drawing/Images, CCD, Referral Note or Patient Summary can be faxed to the referring physician from the Reports Tab on the Patient Summary.



• The Letter can also be faxed from the Letters Section in the chart

Edit	Letter consul	ation					
Unsign	Contacts						
	Name	Address	Fax	R P	L C Status		- 1
Save/Close	MDI	,	727-408-5156	~	✓ Sent		
Header	Preview				Letter Signed	2 Refresh	Fax
	回 P t 🖡	1 of 2	- + Fit Page			ΘDi	»
Letter		MDI Dear Dr. MDI: Thank you The following is a summa	for sending Mdi Dest234 (02/02/1929) whom I exa	mined in consultation on 04/10.	/2018.		
		Reason For Visit: Prepp HPI: CC: Blurred Vision. moderate. HPI obtained Nedical Hx: Pneumococ	ad Chart - Astigmatism OU, Pinguecula OU, Location: superior visual field. Quality: dry. Duratio I by Roberto Ramos, OD cal Vaccine Not Received. Surgical Hxr Appendect	n of Problem: 3-5 days. Severit omy. Galibladder.	y:		

Status of Outbound Faxes

• From the Notifications section click on "Pending Letters"



Types of Status

- "Scheduled"-Outgoing fax is scheduled to be processed. This can also mean that the fax number to be sent to is not valid for the referring provider.
- "Not Scheduled"-The Encounter/Letter in Chart is not signed or there is no R, P, L or C is checked.
- "In Process"-Outgoing fax is in the process of being sent.



• "Failed"-Fax number was attempted, but returned an error. See "Faxes Not Sending" below:



Faxes Not Sending

- From within IntelleChartPro, Select "Admin/Practice Data/Faxes"
- Select "Status" of "Failed"

• Select a Date Range for when the Fax was sent. (If the date range spans several weeks it will show all faxes that failed for that date range.)

Admin My	Settings Practice Data Prac Faxes Contacts Logs Pr	tice Settings Knowledge Base Itients Other Lists CMS Regulatory Repor	Reports Telehealth MDI Adm rts Alerts Reports	in		
Faxes						
Type Clear	Status ✓ All Not Sent ✓	Doctor 🗸	Start Date 5/4/2021	End Date 5/5/2021	Patient Name	Search
Patient Clicking Opens Chart Fax Status Log -Error Description: -Fax Service: Conc	Report Type Letter	Created 5/4/2021	Sent Statu Faile Clicking O Fox Status Lo	is Recipient d Disconstruction pens Clicking Opens Referring Provider Conto	et	L C
5/4/2021 11:47:4 -Fax Job Id: br666 -Fax Job Status Id: -Fax Job Status De -Total Pages: 2 -Error Code: 1508 -Error Description -Fax Service: Conc	0 AM 1612717958520050 3 scription: Not a Fax Machine Not a Fax Machine Reason for Fax F	alure				
5/4/2021 11:30:2 -Fax Job Status De -Fax Number: 5/4/2021 11:30:2 -Status changed to	5 AM scription: Sent to Concord Dial Listed # on left to ve 1 AM Scheduled by	nly the number				

• Click on the "Status" Failed word (The underlined word "Failed" is link to the Status Log.)



• The log starts at the bottom and displays the most current activity at the top

Fax Status Log	
4/19/2017 12:02:07 PM -Fax Job Id: br001h513r17j519548574 -Fax Job Status Id: 2 -Fax Job Status Description: Voice Answer -Total Pages: 2 -From Code: 1503 -From Code: 1503 -Fax Service: Concord	
4/19/2017 12:02:07 PM -Fax Job Id: br001h513r17j519548574 -Fax Job Status Description: Voice Answer -Total Pages: 2 -Error Code: 1503 -Error Code: 1503 -Fax Service: Concord	

Interpreting the Fax Log

- Shows Scheduled by user name
- Shows the fax number used
- If the fax number is invalid the fax will continue to attempt delivery 4 times.

Most Common Errors

- Sit-Tone/Operator Msg means the fax number is not a valid number
- Not a Fax Number
- No Answer
- Voice Answer

Troubleshooting Tips

- Find the fax number from the log and dial the fax number on the phone. A valid fax number will have the fax sound.
- If you found an invalid fax number, call the referring physician and get the correct fax number and change the fax number in your Practice Management (which updates the fax number in IntelleChartPro) or change the contact for the Recipient's fax number to the correct fax number. Resend the fax from the Pending Letters notifications screen from the work flow.
- If you get a valid fax sound that still does not go through to the Recipient, IntelleChartPro Tech Services can contact our third-party provider and customize the way a specific fax number can be sent.
 - This situation usually happens in rural areas where fax lines are old.
 - Usually a different phone company carrier can be set to route the fax better.

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• The actual fax sending can be slowed so the fax gets through.