



OpenText RightFax

This document, as well as the software described in it, is provided under a software license agreement with STI Computer Services, Inc. Use of this software and all related documentation is subject to and limited by the terms and conditions stated in such software license agreement. The content of this manual is furnished for informational use only, is subject to change without notice and should not be construed as a commitment by STI Computer Services, Inc. STI Computer Services, Inc. assumes no responsibility or liability for any errors or inaccuracies that may appear in this document.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose without the express permission of STI Computer Services, Inc.

© 2015 STI Computer Services, Inc. All rights reserved.

Copyright protection claimed includes all forms and matters of copyrightable material and information now or hereafter allowed by statutory or judicial law, including without limitation, material generated from the software programs which are displayed on the screen, such as icons, screen displays, graphics, user interfaces, etc.

ChartMaker Medical Suite is a registered trademark of STI Computer Services, Inc.

All other trademarks and registered trademarks are the properties of their respective companies or mark holders.

Contents

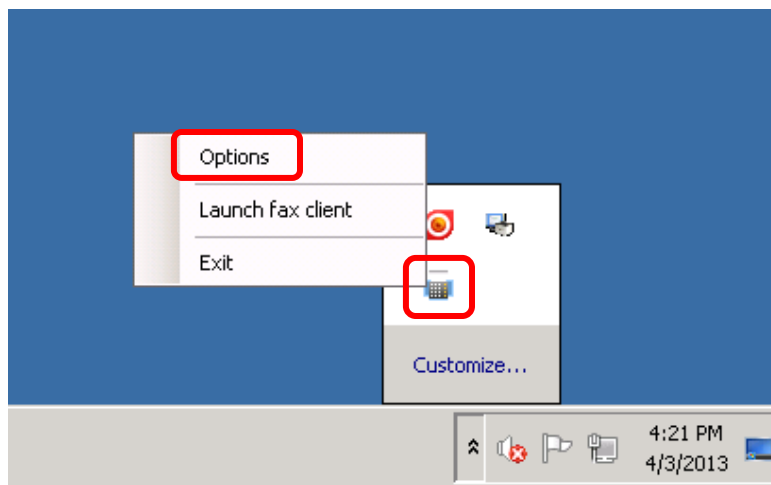
Using RightFax.....	3
Signing into the Fax Appliance	3
Sending a Fax (Using Clinical)	4
Sending a Fax (Using the Fax Printer Driver)	7
Sending a Fax (Using the Fax Server Client).....	9
Managing Received Faxes	11
Fax Appliance Web Interface (User Mode).....	12
Logging into the Web Interface	12
Fax Appliance Folders.....	14
Viewing & Managing Failed Faxes	15
Modifying User Preferences	16
Fax Appliance Web Interface - Administrative Mode.....	17
Overview.....	17
Creating a New User	17
Managing Users	18
Reports	18
Clinical Audit Trail.....	19
Index.....	20
Resources / Notes.....	22
Document Change Log	23

Using RightFax

SIGNING INTO THE FAX APPLIANCE

Users must be logged into the fax appliance in order to successfully send a fax. During your initial setup, you will be logged in as the administrator. You can leave this as your default or change it to a specific user (either will allow you to send a fax).

1. Click the arrow in your **taskbar** to show hidden icons
2. Right-click on the Print-to-Fax icon and select “**Options**”



3. Enter your **Username** and **Password**


NOTE: This is the same user name and password you utilize to access Practice Manager and Clinical. (The network address should have been entered at the time of installation. It is either the IP address of the fax appliance or the name of the fax appliance on the network.)

A screenshot of a Windows dialog box titled 'Print-to-Fax Options'. The dialog contains the following text: 'To print to the fax appliance, you must sign in. Enter your credentials below.' Below this text are three input fields: 'Network Address of the fax appliance' (containing 'xxx.xxx.xx.x'), 'User Name', and 'Password'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The 'Network Address' and 'User Name' fields are highlighted with red boxes.

4. Click “**OK**”

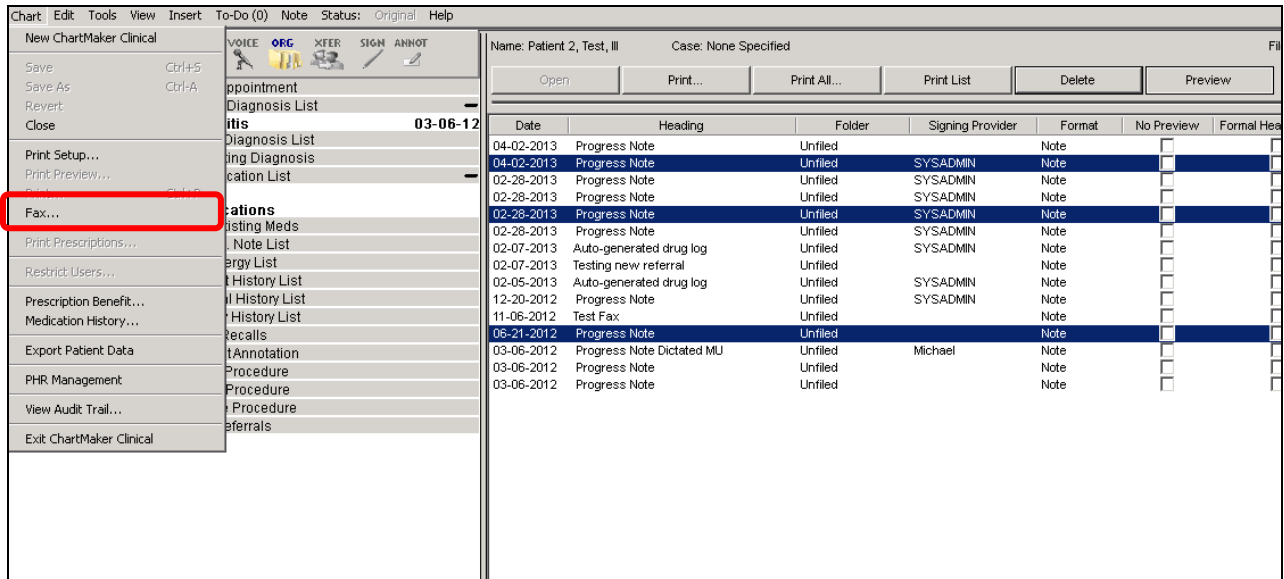
SENDING A FAX (USING CLINICAL)

Single page or multiple page documents can be faxed from within ChartMaker® Clinical through the Organizer in a patient's chart.

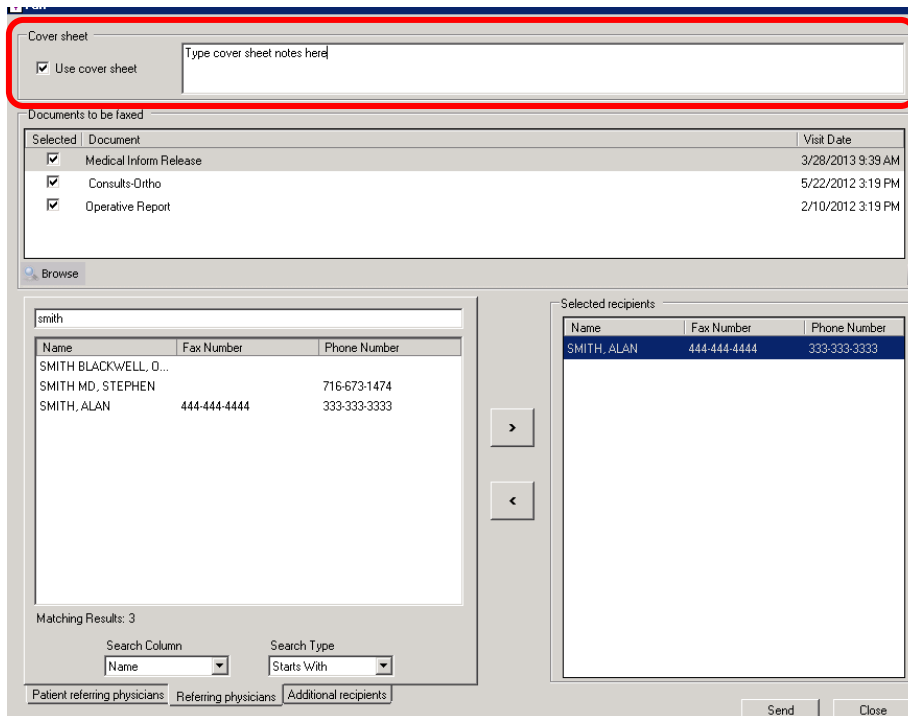
1. Open the patient's chart and access the **Organizer** ()
2. Select the chart **document(s)** that you would like to fax.

TIP: If you would like to fax multiple documents at once, press and hold the "ctrl" key on your keyboard and then select each document.

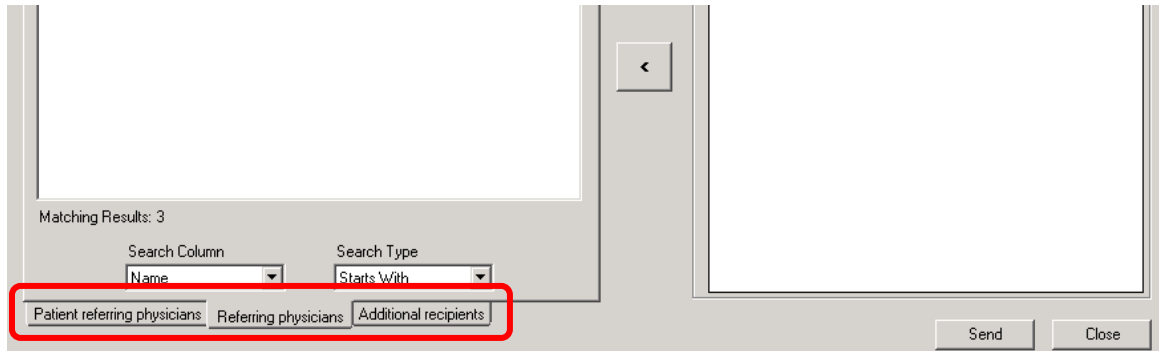
3. Go to **Chart > Fax...**



4. (Optional) Enter any applicable cover sheet notes

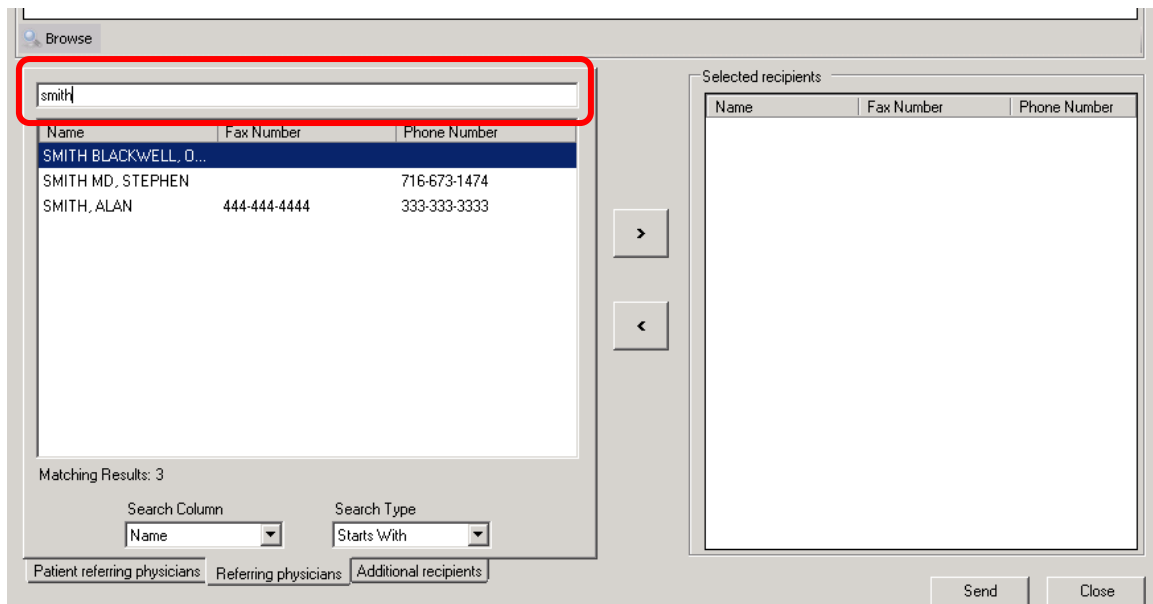


5. Select the **type of recipient** you are searching for by selecting the corresponding tab




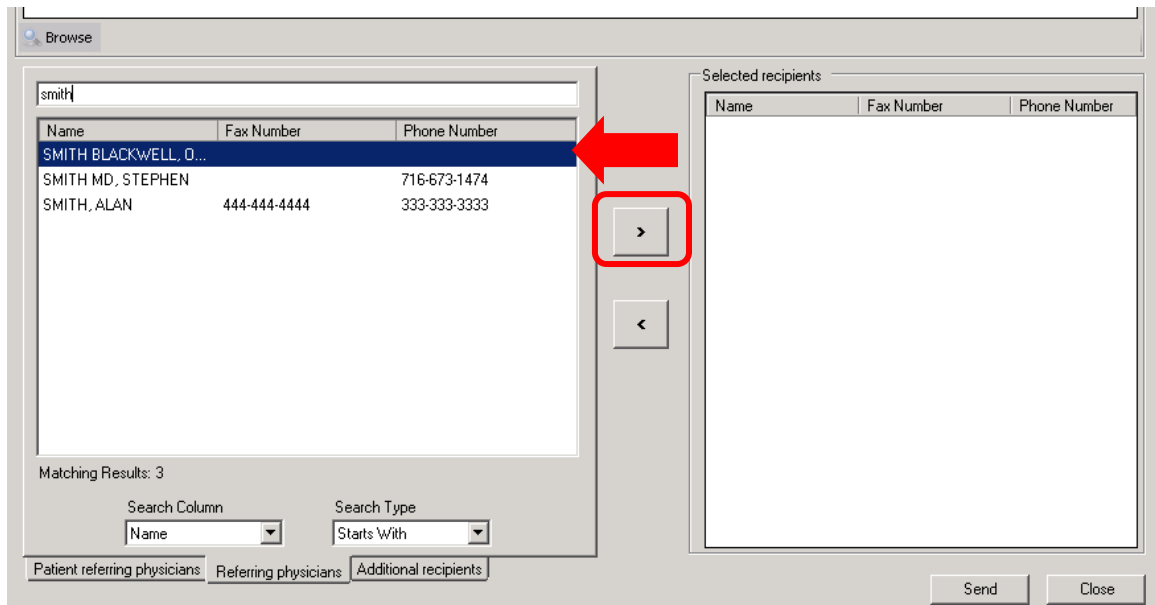
Tab	Allows you to select...
Patient referring physicians	Any referring providers that are linked to the patient's account
Referring physicians	Any referring provider setup in the Referrals table (Administration > Practice Tables) in Practice Manager
Additional recipients	A provider not in the Referrals table by allowing you to manually enter a recipient

6. **Search** for the fax recipient



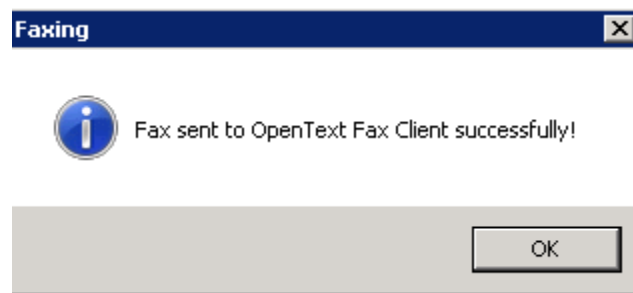
NOTE: You can search by Name, Fax Number or Phone Number by selecting the applicable option from the Search Column dropdown.

7. Highlight the applicable **recipient(s)** on the left and click the **arrow** () to move the recipient(s) to the “Selected recipients” section on the right



8. Click “**Send**”

NOTE: The following message will appear when the documents were successfully prepared and transmitted to the OpenText Fax Appliance. This only indicates that the documents were transmitted to the fax appliance. **This does not indicate successful transmission of the fax to the fax recipient(s).**

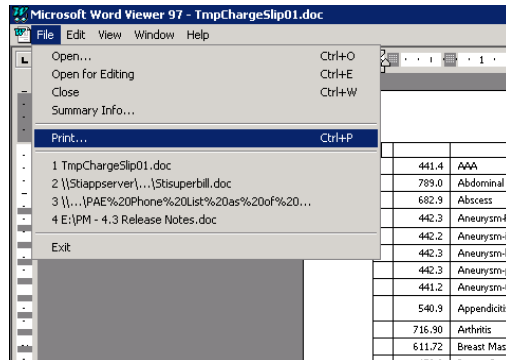


9. Click “**OK**”

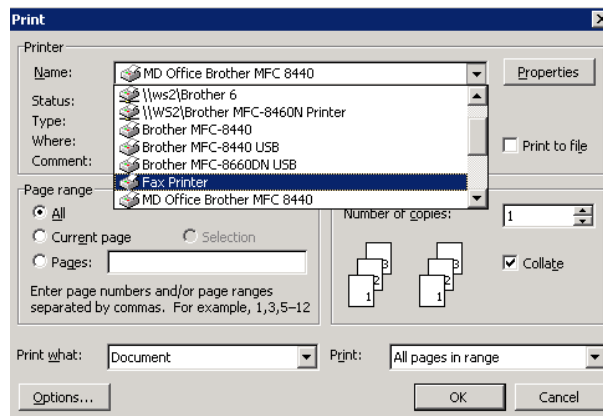
SENDING A FAX (USING THE FAX PRINTER DRIVER)

Single page or multiple page documents can also be faxed outside of ChartMaker® Clinical, using the Print feature in a third-party program.

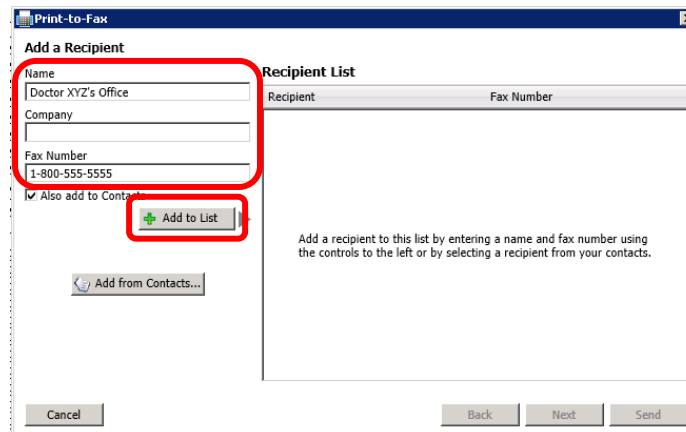
1. From the File menu of your program (Word, Excel, Internet Explorer, etc), select “Print...”



2. Select “Fax Printer” from the dropdown and click “OK”



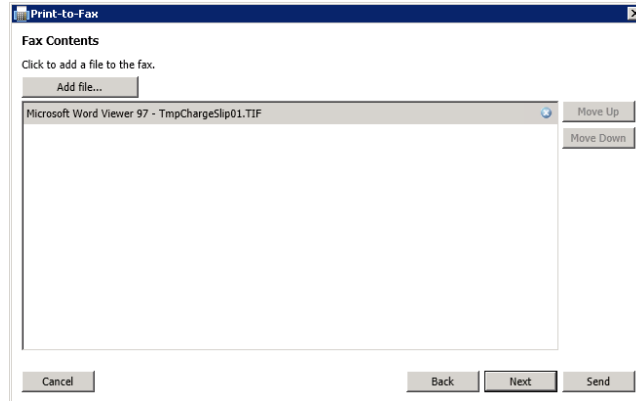
3. Type the recipient’s name and fax number and click “Add to List”.



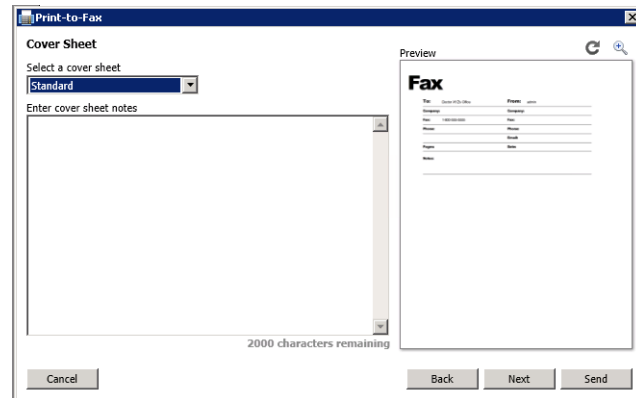
TIP: You can check “Also add to Contacts” to keep a personal address book. These contacts will not be shared with others. (Note: If you are logged in as an administrator, the contacts added here will stay with that administrative user)

- Click **“Send”** OR if you have more documents to add to this fax or want to modify some of the features, you can click **“Next”**

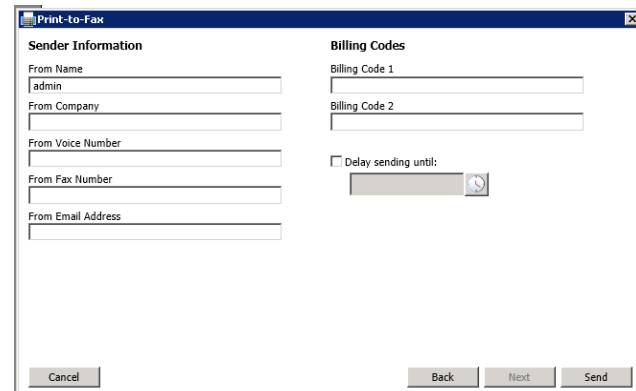
If you selected “Next”, you will have the option to attach a document by clicking **“Add file...”** and then browsing to select the file. If you would like to send the fax at this point, click **“Send”**. If you would like to configure a cover sheet, click **“Next”**.



If you selected “Next”, you will have the option to configure a cover sheet. The administrator has the option to create multiple cover sheets. Choose the one you want by clicking the dropdown under **“Select a cover sheet”**. Type your notes for the recipient in the “Enter cover sheet notes” box. If you would like to send the fax at this point, click **“Send”**. If you would like to configure your contact information, click **“Next”**.



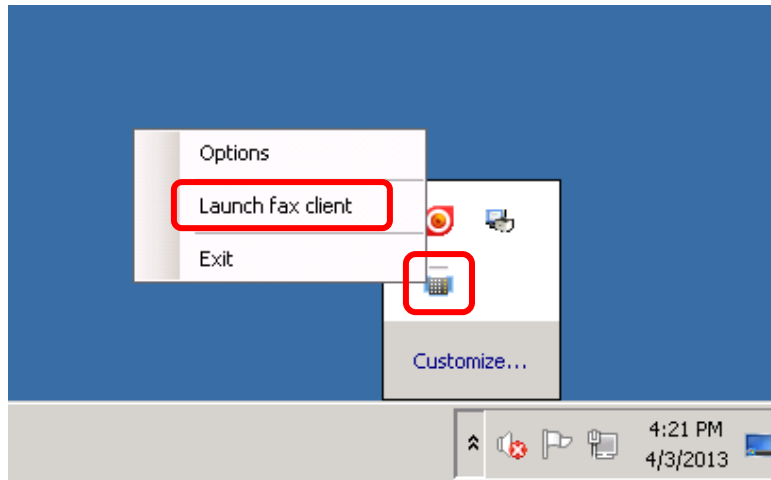
If you selected “Next”, you will have the option to configure YOUR contact information (Name, Company, Phone, etc.), which will be displayed on the cover page, as well as the delivery time of the fax. If you would like to schedule the fax to be sent at a later time, check the box for **“Delay sending until:”** and either type in the time or click the clock for a dropdown list of times. Click **“Send”**.



SENDING A FAX (USING THE FAX SERVER CLIENT)

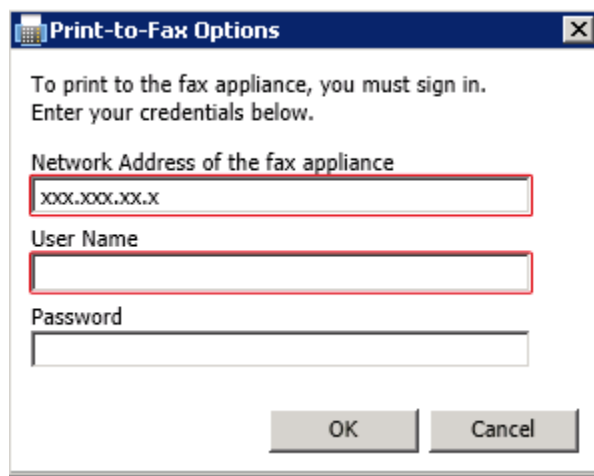
Single page or multiple page documents can also be faxed directly from the fax server client.

1. Click the arrow in your **taskbar** to show hidden icons
2. Right-click on the Print-to-Fax icon and select “**Launch fax client**”



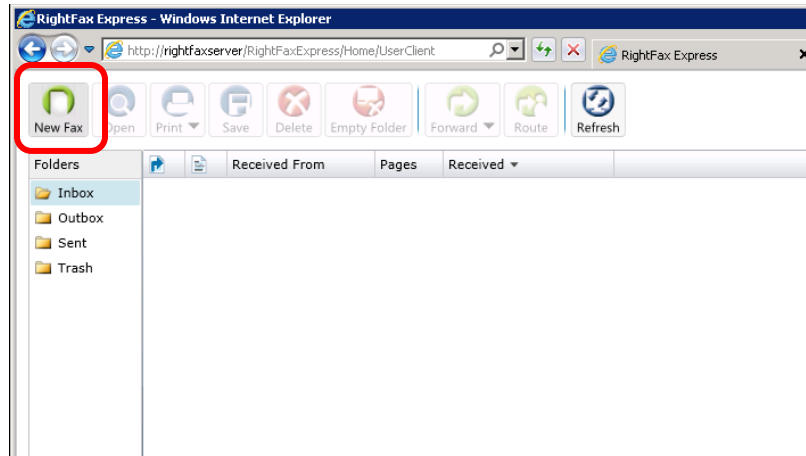
3. Enter your **Username** and **Password**

NOTE: This is the same user name and password you utilize to access Practice Manager and Clinical. (The network address should have been entered at the time of installation. It is either the IP address of the fax appliance or the name of the fax appliance on the network.)

A screenshot of a Windows dialog box titled 'Print-to-Fax Options'. The dialog contains the following text: 'To print to the fax appliance, you must sign in. Enter your credentials below.' Below this text are three input fields: 'Network Address of the fax appliance' (containing 'xxx.xxx.xx.x'), 'User Name', and 'Password'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. The 'Network Address' field is highlighted with a red rectangular box.

4. Click “**OK**”

5. Click **“New Fax”**



6. From the Send Fax dialog, enter the recipient's **Name** and **Fax Number**

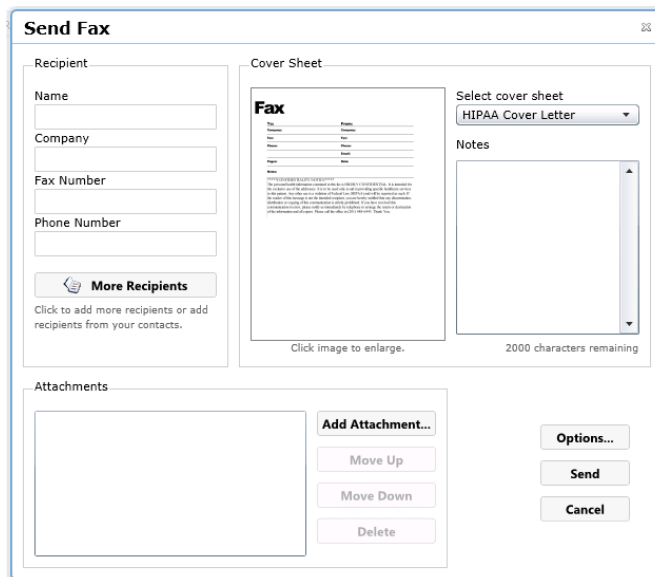
NOTES: You can add additional recipients by clicking the **“More Recipients”** button. Contacts from the administrator profile will not be available if you are signed in as a different user.

OPTIONAL:

To select a cover sheet, select the applicable version from the **“Select cover sheet”** dropdown and enter any applicable notes to the recipient in the **“Notes”** box. and add your notes if necessary. To modify your contact information (name, phone number, etc.) or time of delivery, click **“Options...”**.

7. Click **“Add Attachment...”** to browse and select the document you would like to fax

TIP: You can change the order of multiple attachments with the **“Move Up”** and **“Move Down”** options.

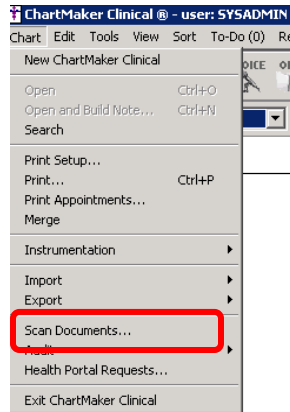


8. Click **“Send”**

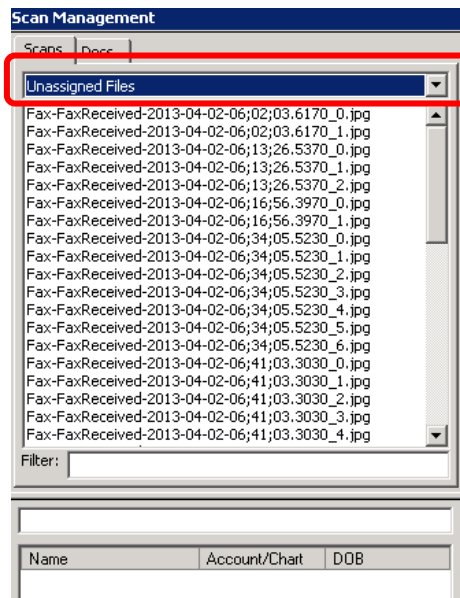
MANAGING RECEIVED FAXES

The OpenText Fax Appliance may also be utilized to receive incoming faxes. The destination path/folder for incoming faxes is generally the scans folder on the server but may differ based on individual client need and/or preference.

1. In Clinical, go to Chart > Scan Documents



2. Select the applicable Scans directory (i.e. Local Files or Unassigned Files)



3. Complete the remaining steps to select the patient, heading, date and folder for the scan/fax and click "**Save**"

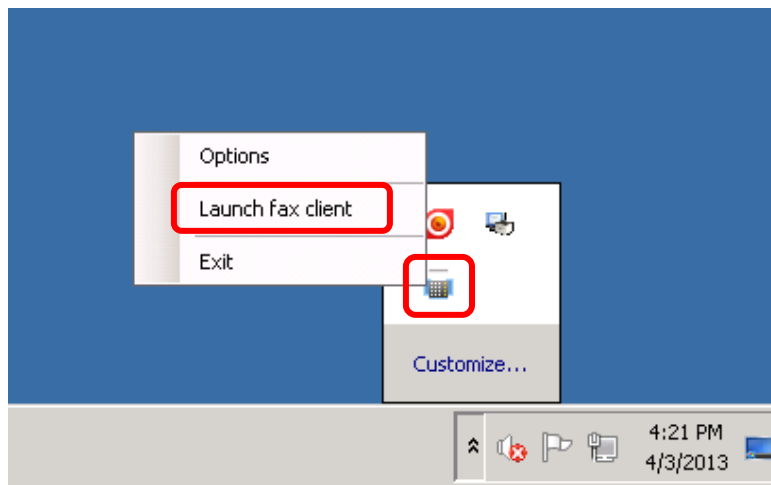
Fax Appliance Web Interface (User Mode)

LOGGING INTO THE WEB INTERFACE

The fax appliance web interface can be accessed in one of two ways. Either method will require the user to enter their fax appliance username and password.

Via the Fax Client:

1. Click the arrow in your **taskbar** to show hidden icons
2. Right-click on the Print-to-Fax icon and select “**Launch fax client**”



3. Enter your **Username** and **Password**

NOTE: This is the same user name and password you utilize to access Practice Manager and Clinical. (The network address should have been entered at the time of installation. It is either the IP address of the fax appliance or the name of the fax appliance on the network.)

A screenshot of a dialog box titled 'Print-to-Fax Options'. The dialog contains the following text: 'To print to the fax appliance, you must sign in. Enter your credentials below.' Below this text are three input fields: 'Network Address of the fax appliance' with the placeholder text 'xxx.xxx.xx.x', 'User Name', and 'Password'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The 'Network Address' field is highlighted with a red border.

4. Click “**OK**”

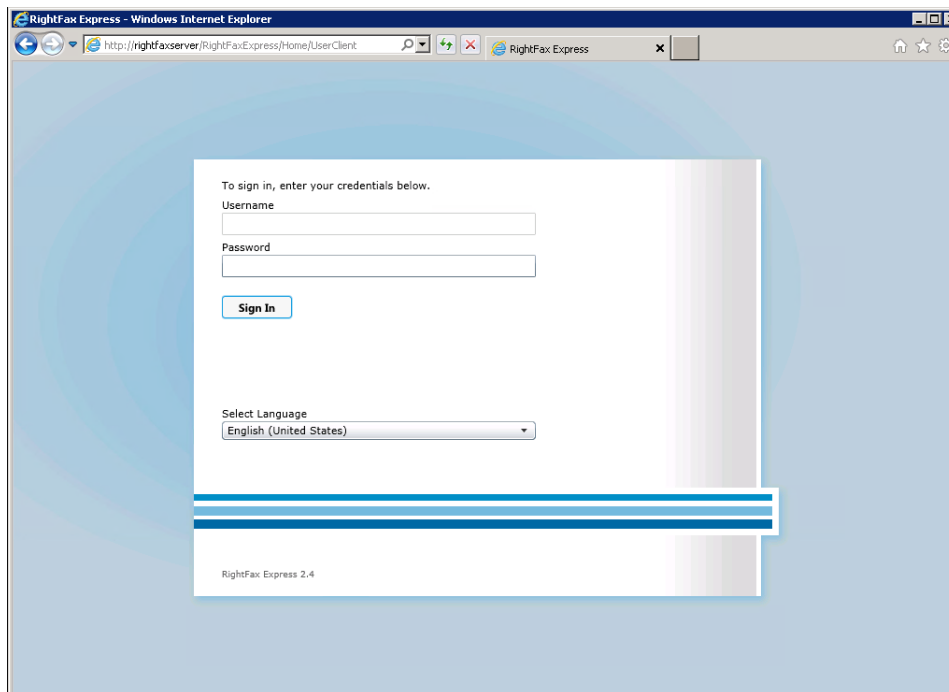
Via the Internet:

1. Open a web browser and type <http://otfa/> or <http://rightfaxserver/rightfaxexpress> in the address bar
2. Select “User”



3. Enter your **Username** and **Password**

NOTE: This is the same user name and password you utilize to access Practice Manager and Clinical. (The network address should have been entered at the time of installation. It is either the IP address of the fax appliance or the name of the fax appliance on the network.)

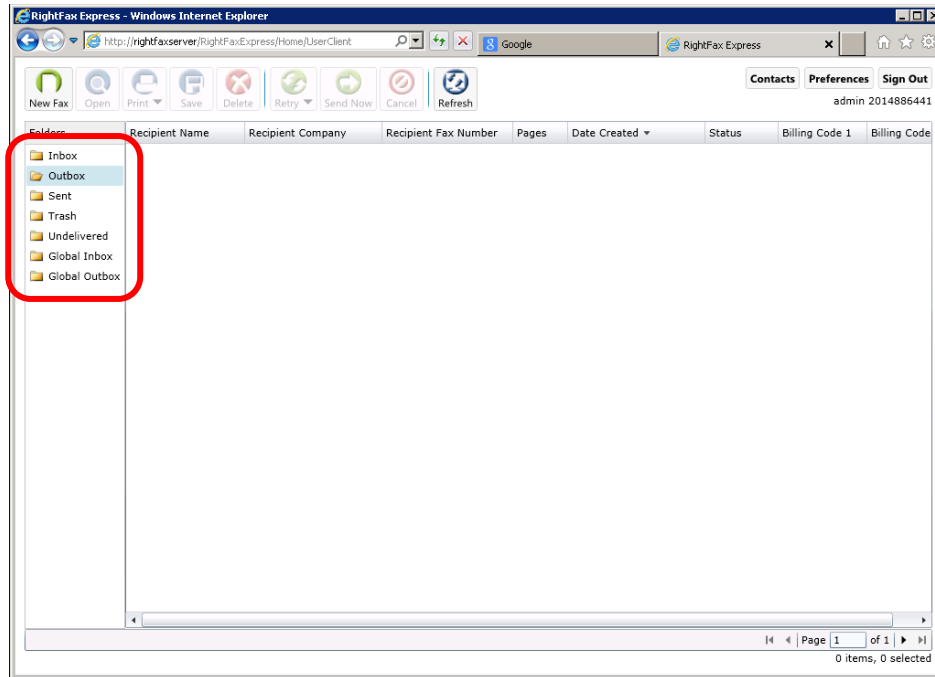


4. Click “**Sign In**”

FAX APPLIANCE FOLDERS

The fax appliance web interface provides various folder options (Inbox, Outbox, Sent, Trash) for viewing your fax transmissions. Please note, **folder content is user specific** and is based on which user is signed into the fax appliance.

The typical, default, fax transmission setting will attempt to send each fax up to 4 times with 5 minutes in between each attempt.

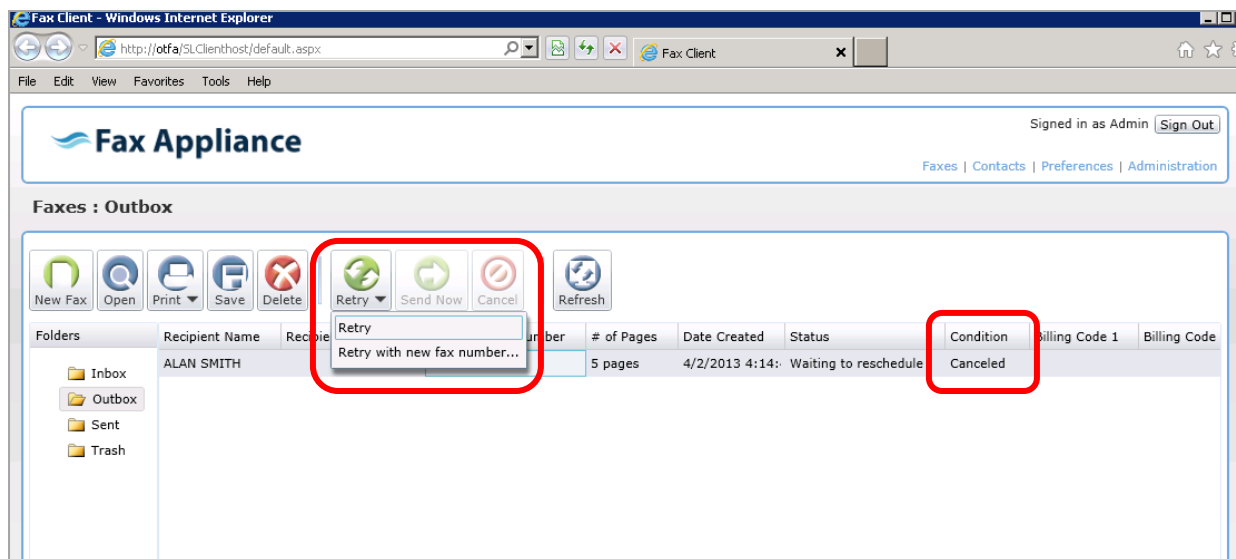


Folder	Allows you to...
Inbox	View incoming faxes
Outbox	View faxes which are in the process of being transmitted by the fax appliance. Once the fax transmission is complete, the fax will disappear from the Outbox and can be viewed in the Sent folder. Faxes which fail will remain in the Outbox with a Condition of "Failure".
Sent	View faxes which have been sent successfully
Trash	View faxes which were manually deleted
Global Inbox*	View all incoming faxes
Global Outbox*	View all outgoing faxes

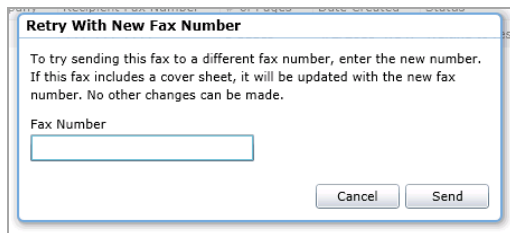
* Only available if set by the administrator

VIEWING & MANAGING FAILED FAXES

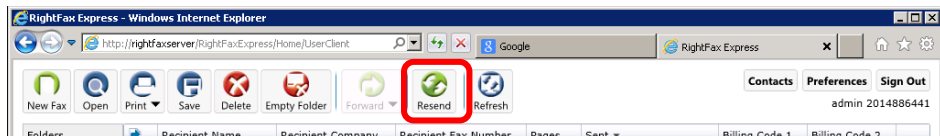
Failed faxes will reside in the Outbox of the fax appliance. The Condition column will display a status of “Failure” for failed faxes. Failed faxes can be retried by highlighting the failed fax and selecting the “Retry” icon.



The “Retry” icon provides two options: Retry or Retry with new fax number. Retry with new fax number allows you to attempt sending the fax with an alternate fax number.

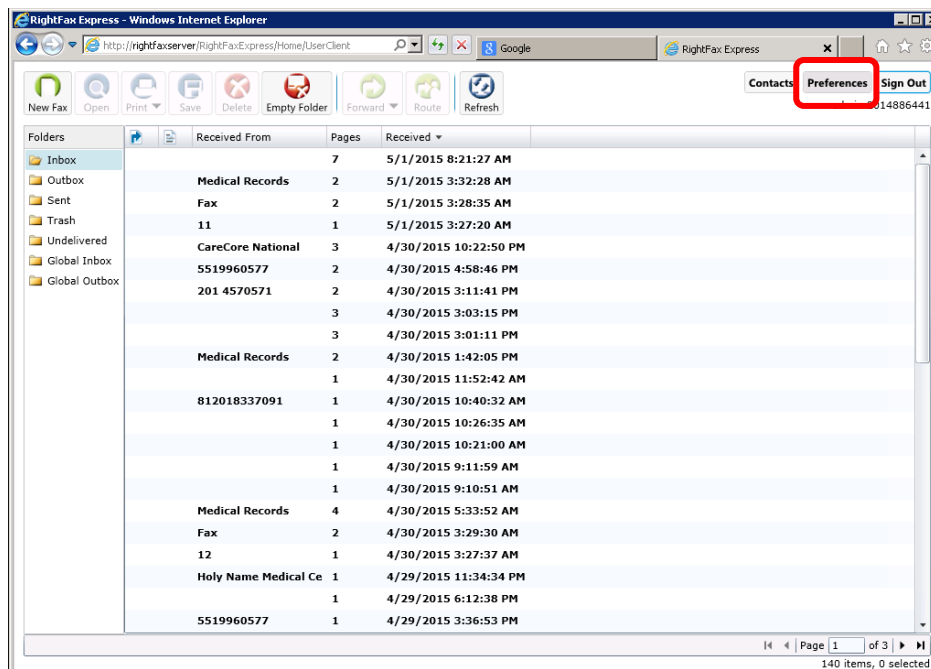


The “Resend” icon (available in the Sent Folder) allows you to resend a fax that was previously sent.

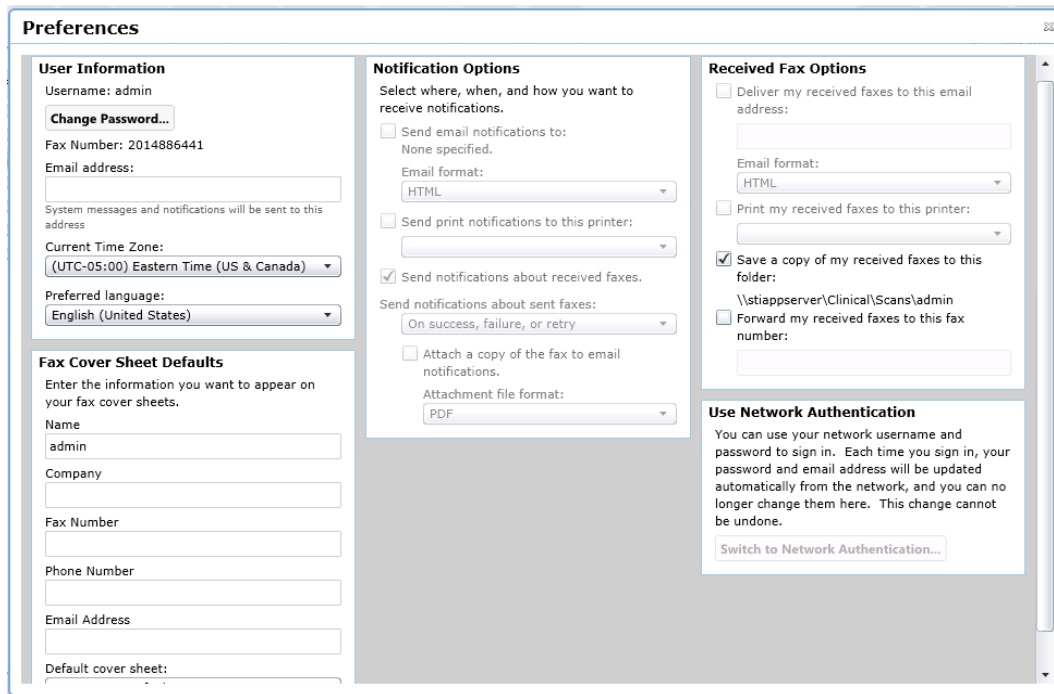


MODIFYING USER PREFERENCES

1. Click “Preferences” in the top right corner of the screen



2. Select the type of information you want to modify (**User Information, Fax Cover Sheet Defaults, Notification Options, or Received Fax Options**)
3. Modify the applicable information

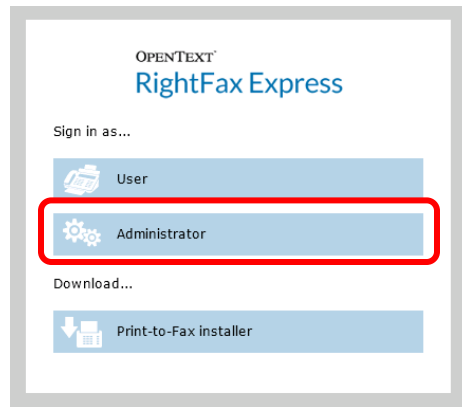


4. Click the “X” in the upper right after making changes

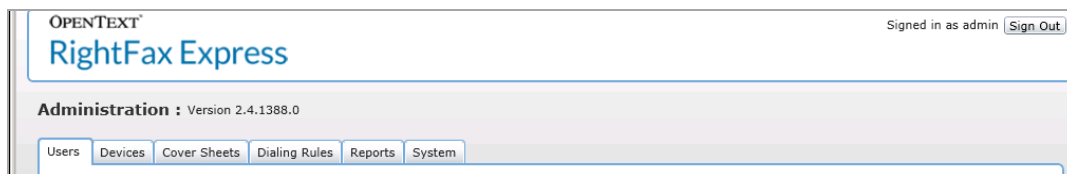
Fax Appliance Web Interface - Administrative Mode

OVERVIEW

When logging into the fax appliance web interface in order to modify system defaults and configurations, make sure you select “Administrator” and log in with administrator credentials.



After logging in, you will have the ability to manage the faxing software using the following tabs: Users, Devices, Cover Sheets, Dialing Rules, Reports, and System.



NOTE: Do not use the Devices tab. The Dialing Rules tab is not applicable. Cover sheets need to be edited in HTML. If you do not have knowledge of HTML, please contact Clinical Support for assistance.

CREATING A NEW USER

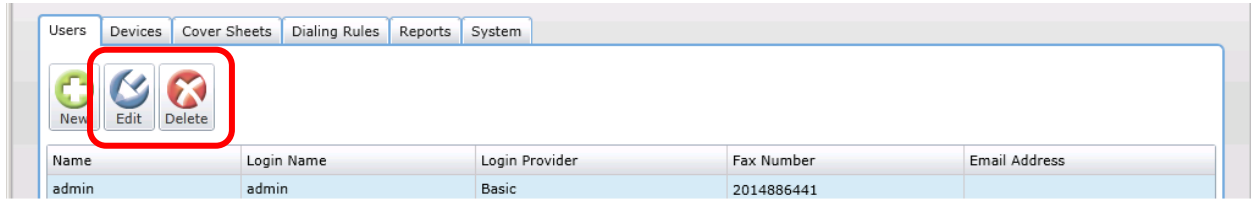
1. From the User tab, click “**New**”
2. Add the appropriate **information** into the fields

NOTE: You can provide the user access to the “shared contacts”, have the user see all global faxes (by default, you will only see the faxes *you* send and receive) and/or allow another user to be an administrator.

3. Click “**Save**”

MANAGING USERS

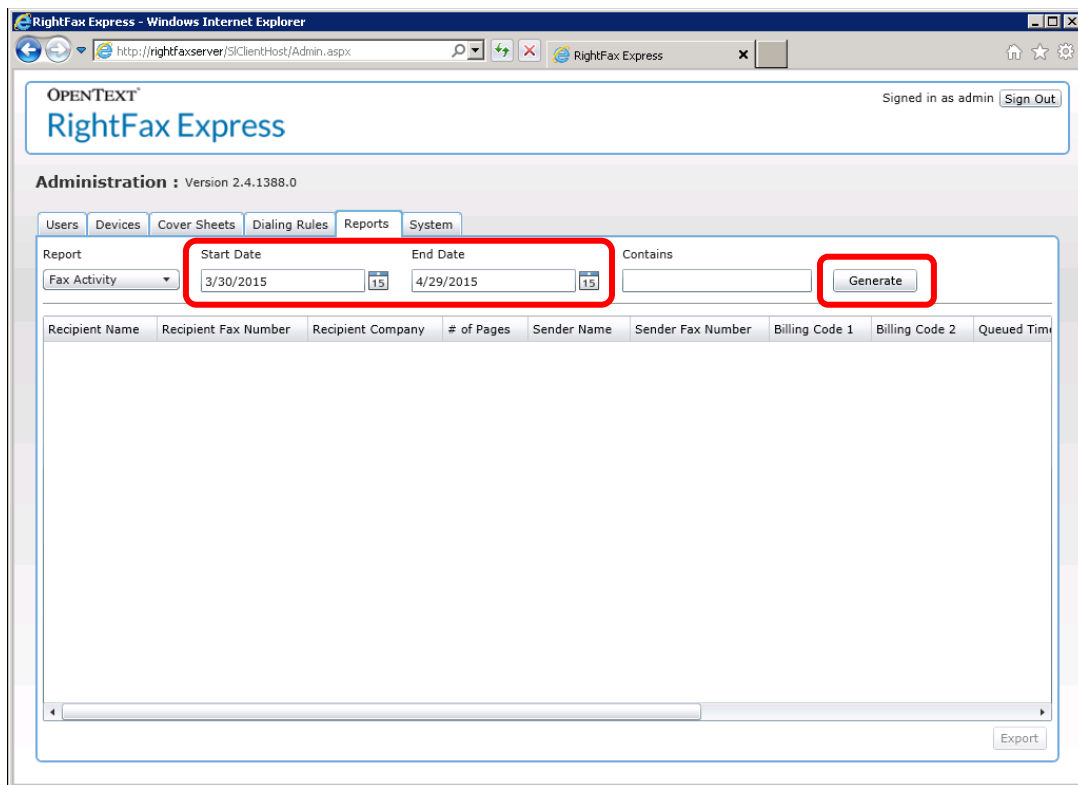
1. From the Users tab, highlight the **user**
2. Click “**Edit**” to modify the user’s information (including password) or “**Delete**” to remove them from the system



3. If editing, click “**Save**” to close the dialog

REPORTS

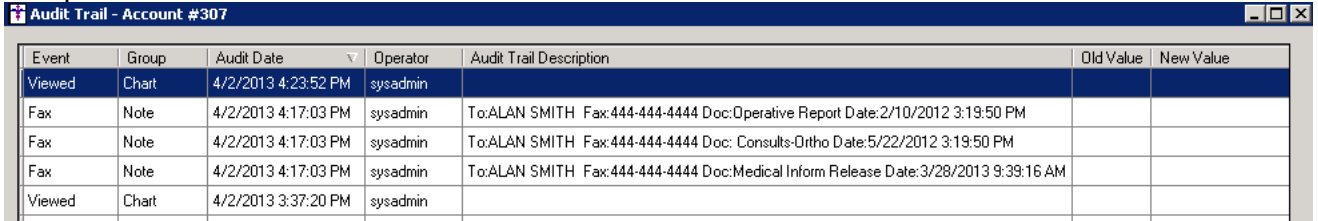
You can see activity reports through the Reports tab by selecting the Start and End Dates and then clicking “Generate”.



CLINICAL AUDIT TRAIL

The Audit Trail in ChartMaker® Clinical will display faxes that were processed and sent to the OpenText Fax Appliance. This does not verify that the fax was successfully transmitted to the fax recipient(s). To verify the transmission, reference the fax appliance web interface.

Sample Audit Trail:



Event	Group	Audit Date	Operator	Audit Trail Description	Old Value	New Value
Viewed	Chart	4/2/2013 4:23:52 PM	sysadmin			
Fax	Note	4/2/2013 4:17:03 PM	sysadmin	To:ALAN SMITH Fax:444-444-4444 Doc:Operative Report Date:2/10/2012 3:19:50 PM		
Fax	Note	4/2/2013 4:17:03 PM	sysadmin	To:ALAN SMITH Fax:444-444-4444 Doc: Consults-Ortho Date:5/22/2012 3:19:50 PM		
Fax	Note	4/2/2013 4:17:03 PM	sysadmin	To:ALAN SMITH Fax:444-444-4444 Doc:Medical Inform Release Date:3/28/2013 9:39:16 AM		
Viewed	Chart	4/2/2013 3:37:20 PM	sysadmin			

Index

A

Add Attachment · 10
Add File · 8
Additional recipients · 5
Also add to Contacts · 7

C

Chart > Fax · 4
Chart > Scan Documents · 11
Clinical Audit Trail · 19
Cover sheet · 4, 8, 10, 17
Creating a new user · 17

D

Delay sending until · 8
Devices · 17
Dialing Rules · 17

F

Failed faxes · 15
Fax appliance folders · 14
Fax Appliance Web Interface · 12, 14, 17
Fax Appliance Web Interface-Administrative Tasks · 17
Fax Printer · 7
Fax Status Notifications · 16

I

Inbox · 14
Incoming faxes · 11

L

Launch fax client · 9, 12
Logging into the web interface · 12

M

Managing received faxes · 11
Managing users · 18
Modifying user preferences · 16
More Recipients · 10

N

New Fax · 10

O

Options · 10
Organizer · 4
Outbox · 14, 15

P

Patient referring physicians · 5
Preferences · 16
Print · 7
Print-to-Fax Launch fax client · 9, 12
Print-to-Fax Options · 3

R

Received Fax Options · 16
Referrals · 5
Referring physicians · 5
Reports · 17, 18
Retry · 15
Retry with new fax number · 15

S

Scans directory · 11
Select a cover sheet · 8
Select cover sheet · 10
Selected recipients · 6
Sending a Fax (Using Clinical) · 4

Sending a Fax (Using the Fax Printer Driver) · 7
Sending a Fax (Using the Fax Server Client) · 9
Sent · 14
Signing into the fax appliance · 3
System · 17

T

Taskbar · 3, 9, 12
Trash · 14

U

User Information · 16
Users · 17

V

Viewing & managing failed faxes · 15

Document Change Log

Date	Version	Changes
5/1/15	5.6	Initial Release