I N D I V I C A

Incoming Fax Management

This document outlines the process for checking faxes as they come directly into your OSCAR system.

I. Checking Faxes

Faxes that are sent to your clinic are stored in a special Inbox until they are assigned and removed.

1. Click Inbox in your OSCAR toolbar. In the top left, click Search.

2. In the list of Physicians, find and click the provider "ithream z_indivica".
   Note: By default, the faxes will go to this Inbox. However, in some special cases, faxes are stored in different Inboxes. If faxes are not being sent to the ithream z_indivica inbox, please contact your office administrator.

3. Click Search.

> ⚠️ **Warning:** There is no indication in OSCAR that an Inbox other than yours has new items. Your office will have to decide on a protocol for checking faxes (e.g. check every other hour, check at the beginning of the day, etc.).

II. Assigning Faxes

1. After you check your faxes (see Section I), click Not, Assigned.

☐ Health Number	Patient Name	Sex	Result Status	Date of Test
☐	Not, Assigned			2014-02-18

2. A new window appears. Fill in the right-hand side fields. It is recommended the fields (a)-(j) be filled top-to-bottom then the z_indivica, ithream provider be removed (k), then the document Filed away (o).

(a) **Image Preview**. Shows you the first page of the fax. Clicking this page will download the PDF for viewing. If there are multiple pages, this allows you to view all pages.

(b) **Split, Rotate**. Use Split if a document is for multiple patients (see Section III). Use Rotate to fix a document's orientation.

(c) **Document Type**. Select from a list of document types. These are used to filter documents when in a patient chart.

(d) **Document Description**. Type in a description for the document. This is what displays on a patient's chart.

(e) **Observation Date**. Chose and observation date for the document. It is recommended the calendar icon be clicked and a date chosen from the calendar.

(f) **Demographic**. Type in the name of the patient in the form Lastname, Firstname. Results will appear as you type in the name.

(g) **Create New Demographic**. If a patient does not yet exist in the system, click this button to create a new demographic record. Note that you will still need to select the demographic in (f).

(h) **Flag Provider**. Indicates which doctor(s) will receive a copy of the document in their Inbox. A demographic's MRP is automatically selected. You can add more by typing in a provider's name in the form Lastname, Firstname.
Note: You can click -remove- if you do not wish a doctor to be sent a copy.

(i) **Creator**. Information on who uploaded the document. If the creator is Z_INDIVICA, ITHREAM, it was a fax (not uploaded by a user).

(j) **Save**. Saves all changes including putting it in the demographic's chart and sending a copy to any flagged providers.

(k) **Linked Providers**. Shows a list of providers who have a copy in their Inbox. Click (Remove) to remove it from that provider's inbox.
Warning: You must remove z_indivica, ithream when handling faxes or else the fax will remain in that inbox (making it difficult to handle any future incoming faxes).
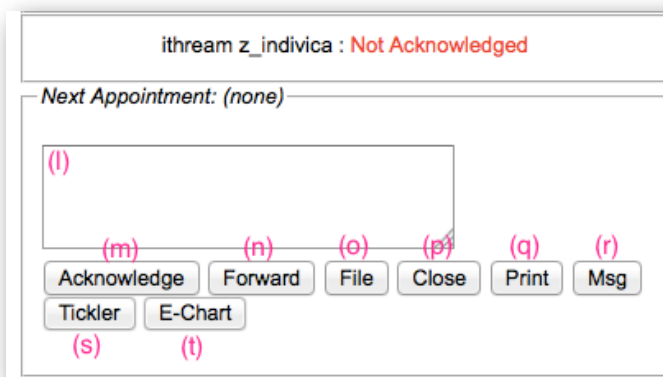
(l)   **Comment box**. You may type in a comment. It will appear the next time it is viewed in anyone's Inbox.
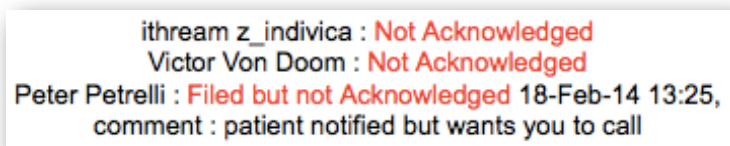
(m)   **Acknowledge**. Tags the user as having acknowledged the document. This indicates the user has taken all medical responsibilities necessary. This is primarily used by physicians.

(n)   **Forward**. Opens a new window to indicate other providers who should be sent a copy to their Inbox. This is redundant with Flag Provider (h).

(o)   **File**. Tags the user as having filed the document. This indicates the user has not taken medical responsibility. This is primarily used by non-physician staff.

(p)   **Close**. Closes the window without taking any further action.

(q)   **Print**. Downloads a PDF of the document. This is redundant with (a).

(r)   **Msg**. Opens a window to send an OSCAR Message. If a demographic has been saved on this document, he/she will automatically be selected.

(s)   **Tickler**. Opens a window to send a Tickler. If a demographic has been saved on this document, he/she will automatically be selected.

(t)   **E-Chart**. If a demographic has been saved on this document, opens his/her E-Chart.

III. Splitting Faxes

If a fax is meant for two or more patients, you will have to first Split it. This will create a new document in the Inbox that consists of a set of specified pages. Each new document then has to be assigned (see Section II).

1. After previewing the fax (see Section II) and recognizing that it is for multiple patients, click Split. A new window appears.

2. Click on the first page for the first patient then click Add. Repeat this for any other pages that may be for that patient.
   Note: You can double-click any page at any time to zoom in. Press ESC on the keyboard to zoom out again.
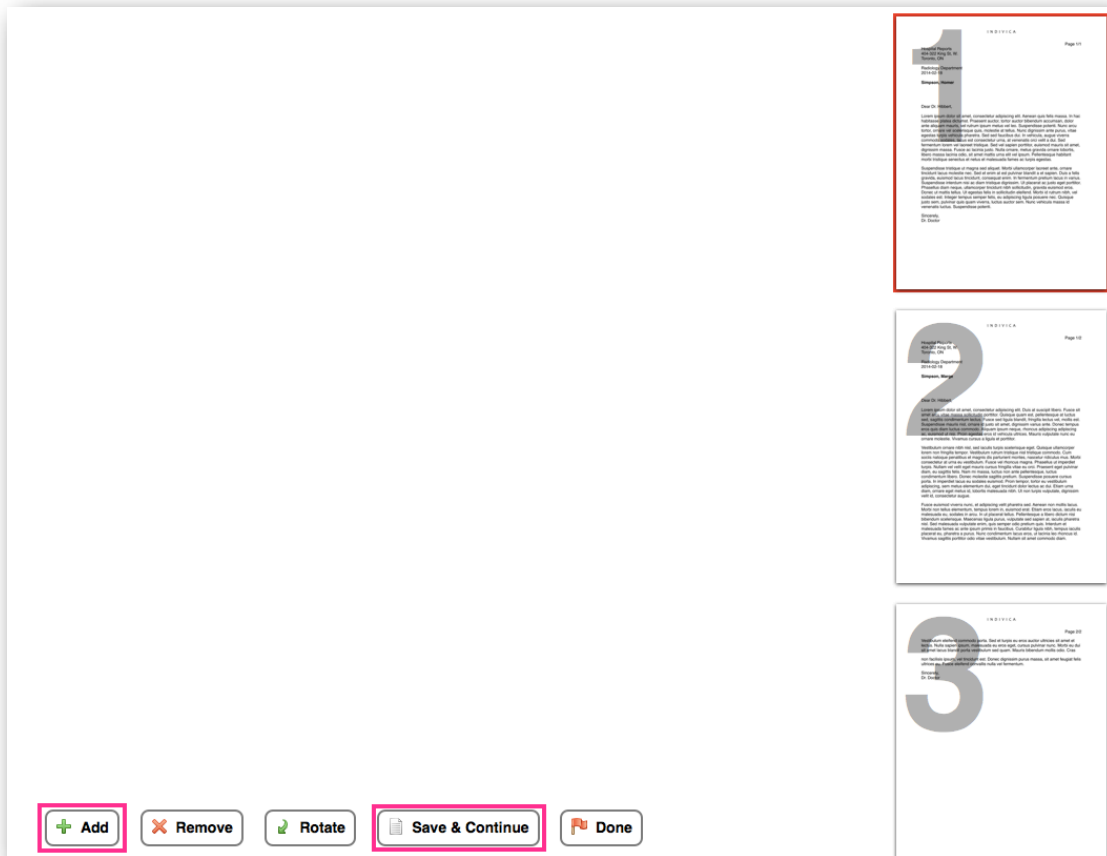
3. Click Save & Continue.
   Note: This generates a new item in the Inbox that has to be assigned.

4. Repeat steps 2-3 for each other patient.

Rotates this page 90 degrees.

Re-orders the pages by moving this page
one page to the left or right.

If a page is added by mistake,
click it then click Remove to return
it back to the side menu.

+ Add   **✕ Remove**   **↻ Rotate**   **▤ Save & Continue**   **⚑ Done**

5. Click Done when you are finished. The window will close. You should be back on the document preview of the original multipatient document.

6. Remove the z_indivica, ithream provider then click File.

7. Refresh the Inbox (Ctrl+R or ⌘+R). You will see new items in the inbox, one for each time you click Save & Continue in step 3.

8. Assign each item as normal (see Section II).

IV. Junk Faxes

1. After previewing a fax (see Section II), recognize it as a junk fax.

2. Remove the z_indivica, ithream account (this removes it from your other fax inboxes).

3. Click File.

4. You will be warned that the document is not assigned to a patient. Click OK.