Sending and Receiving Faxes

**KROLL** Computer Systems Inc.

Contents

Sending and Receiving Faxes

This document explains the fax functionality in Kroll. It outlines the process for receiving incoming documents and sending outgoing faxes, as well how to send faxes as mail.

Configuration

This section explains how to enable the outbound fax service in Kroll so faxes can be sent and received.

1. From the **Alt-X Start** screen, go to **File** > **Configuration** > **Store** > **Interfaces** > **Other** and place a checkmark next to **Use outbound fax service**.
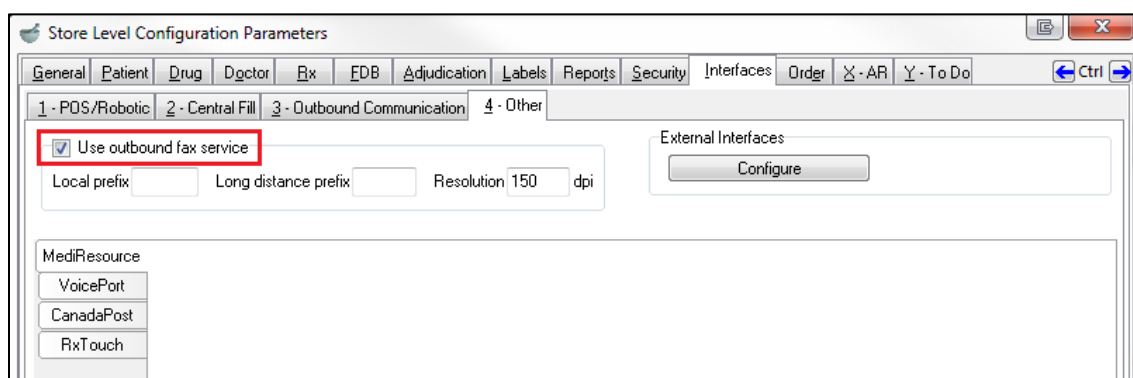
2. Click **OK** to close the **Store Level Configuration Parameters** screen.
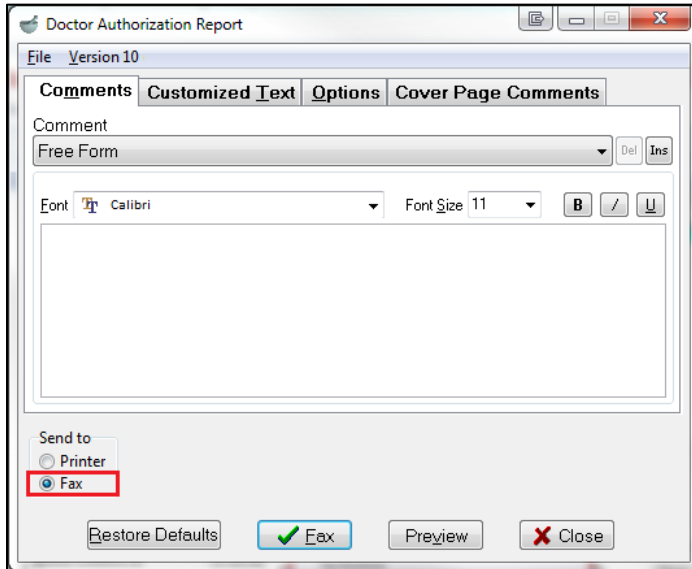
Fax Reports

Several reports can be faxed directly from the report form. This section explains how to fax Prescription Authorization Requests and Rx Transfer Reports.
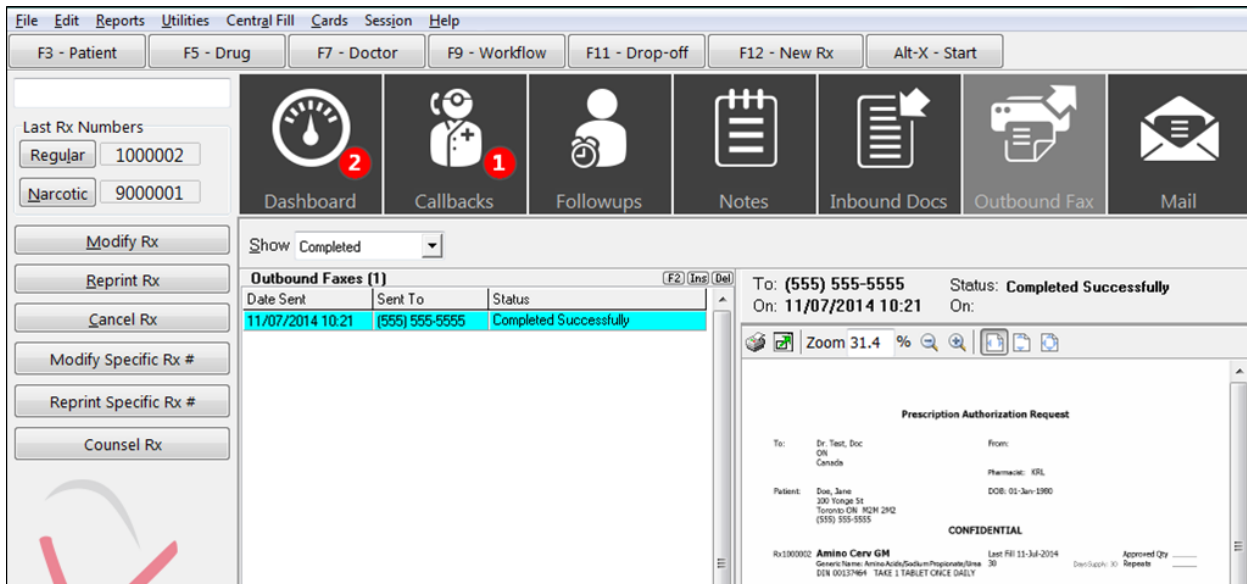
Fax Doctor (Prescription Authorization Request)

1. Call up a patient record and select **All Rxs** from the right navigation pane.

2. Right-click the Rx you want to generate a Doctor Authorization Report for and select **Fax Doctor(s)**.

3. The **Doctor Authorization Report** form will appear. Select the **Fax** radio button and complete the form.

- **Comments tab**: Enter any comments you want to include in the report

- **Customized Text tab**: Enter any body text you want to include in the report

- **Options tab**: Select the components you want to include in the report

- **Cover Page Comments tab**: Enter any comments you want to appear on the cover page for the report

4. Click **Fax**. The Prescription Authorization Request will be sent to the fax number listed on the corresponding doctor profile and will appear in the **Outbound Fax** queue:

Rx Transfer Report

1. Call up a patient record and select **All Rxs** from the right navigation pane.

2. Right-click the Rx you want to transfer out and select **Transfer Rx to Another Store**.

3. Search for the store you want to transfer the Rx to and click **Transfer Out Eligible Rxs**.

4. Answer **Yes** when asked '**Do you want to print the Transfer Report?**'.

5. Click the **Fax** radio button and select **Fax**.
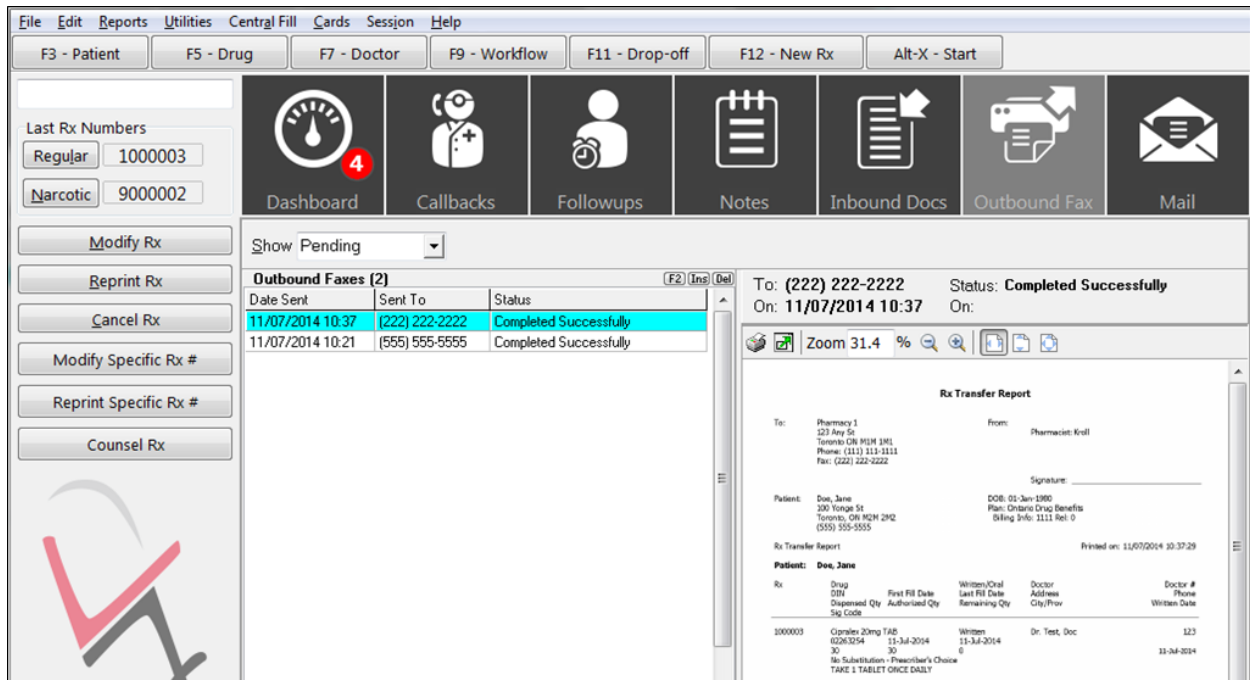
The Rx Transfer Report will be sent to the fax number on the store record that you selected and will appear in the **Outbound Fax** queue:
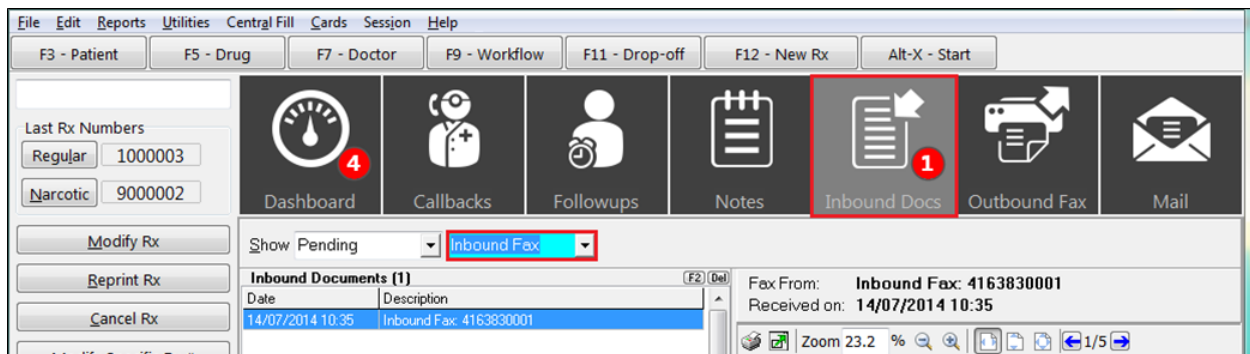
Inbound Documents

Incoming faxes are located in the **Inbound Docs** screen, which is accessed from the default **Alt-X Start** screen. Select **Inbound Fax** from the highlighted dropdown menu to view inbound faxes.

Fax Doctor (Prescription Authorization Request)

Inbound Prescription Authorization Requests contain 2D barcodes that get decoded by the Kroll Background Service. Once a 2D barcode has been decoded .....

1. Double-click the inbound fax from the **Inbound Documents** frame.

2. The **Sort Pages into Documents** screen will appear. If the 2D barcode has been successfully decoded, Rx information will populate on the right side of the screen.
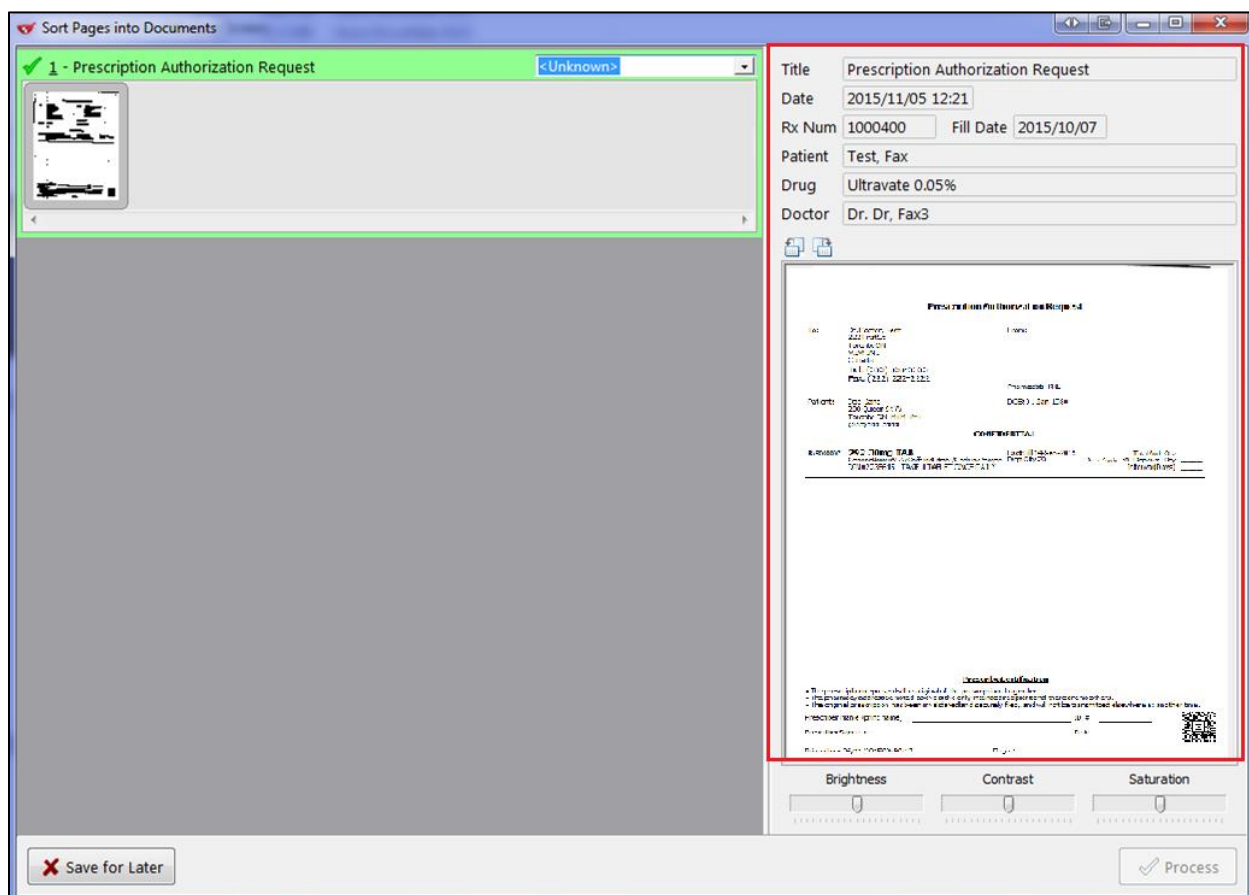
3. Select an option from the dropdown list at the top of the screen. This determines how the inbound fax will be used.
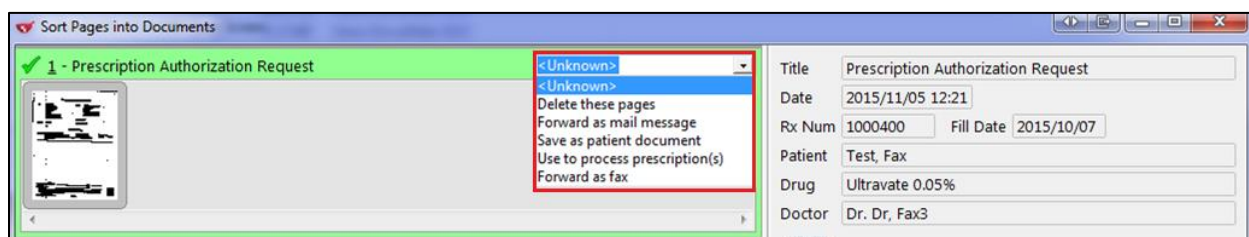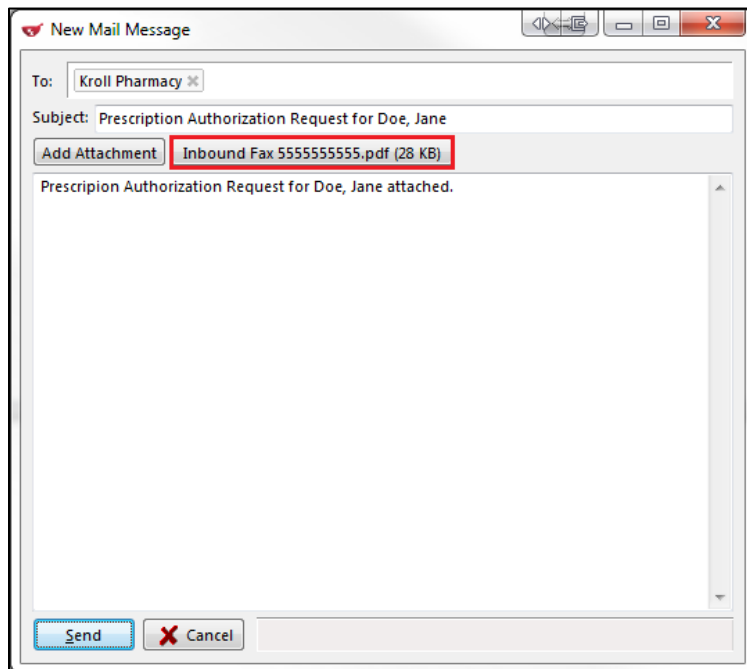
Delete these pages

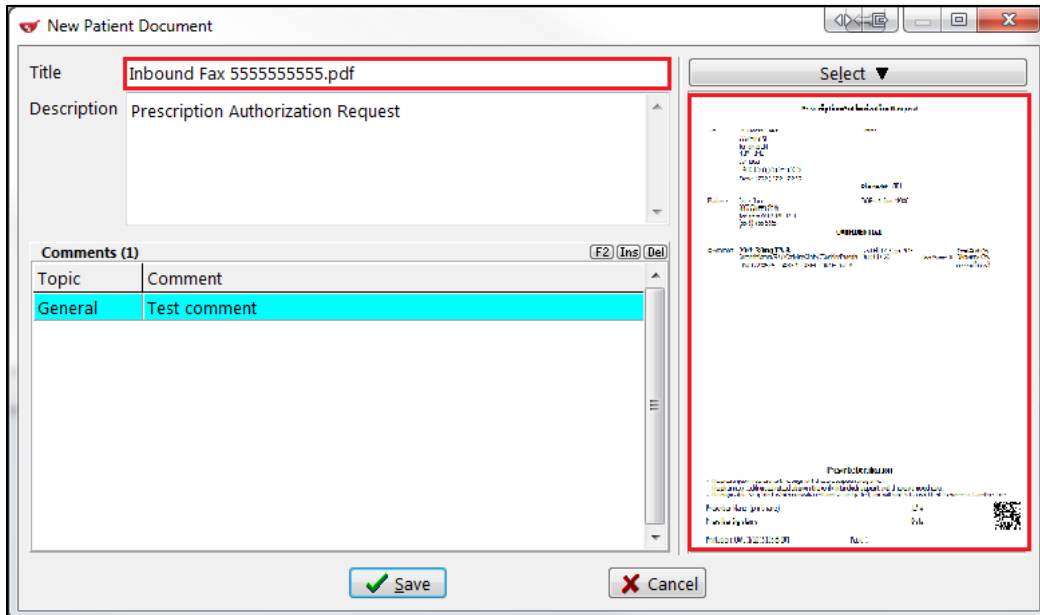The inbound fax image will be deleted.

Forward as mail message

The **New Mail Message** screen will appear with the fax image attached. Select a recipient, enter a subject line, and enter any comments in the space provided (optional). Click **Send**.
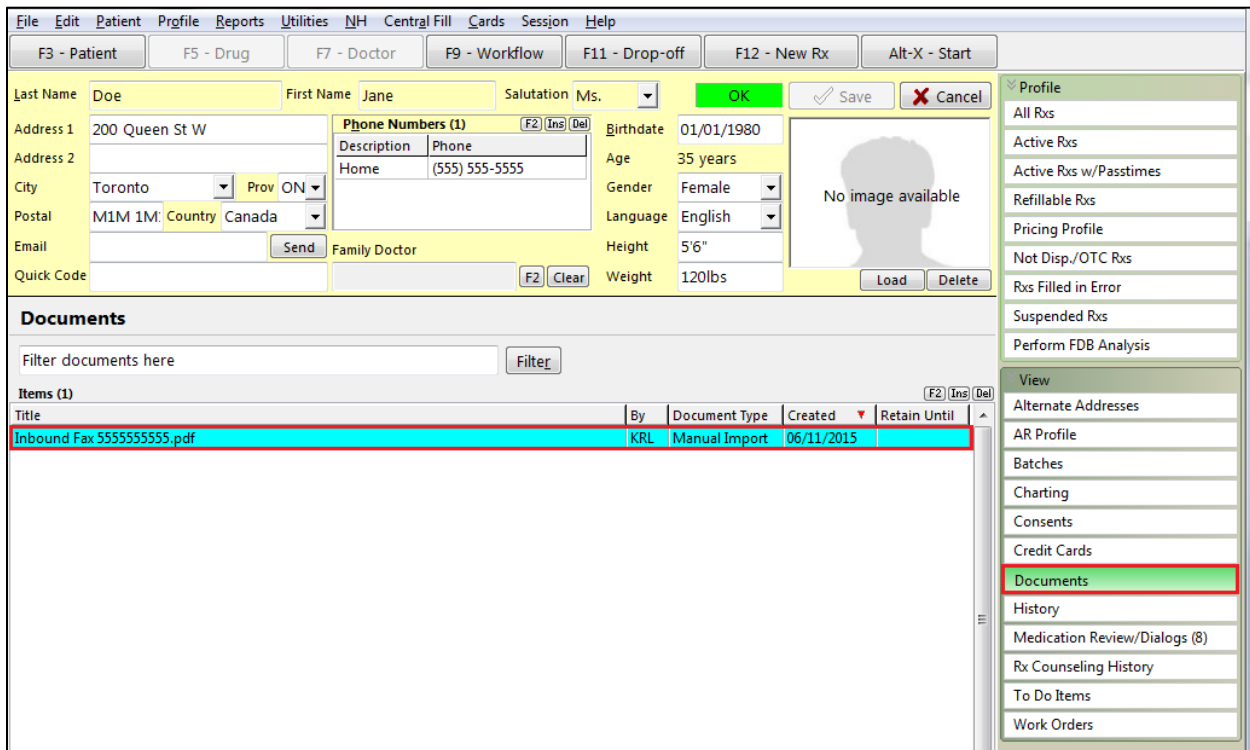
Save as patient document

The **New Patient Document** screen will appear with the fax image attached. Enter a description. Click **Ins** to add a comment to the file (optional). Click **Save**.

The fax image will appear in the patient's document library. This screen can be accessed by selecting **Documents** from the right navigation pane in the patient card.
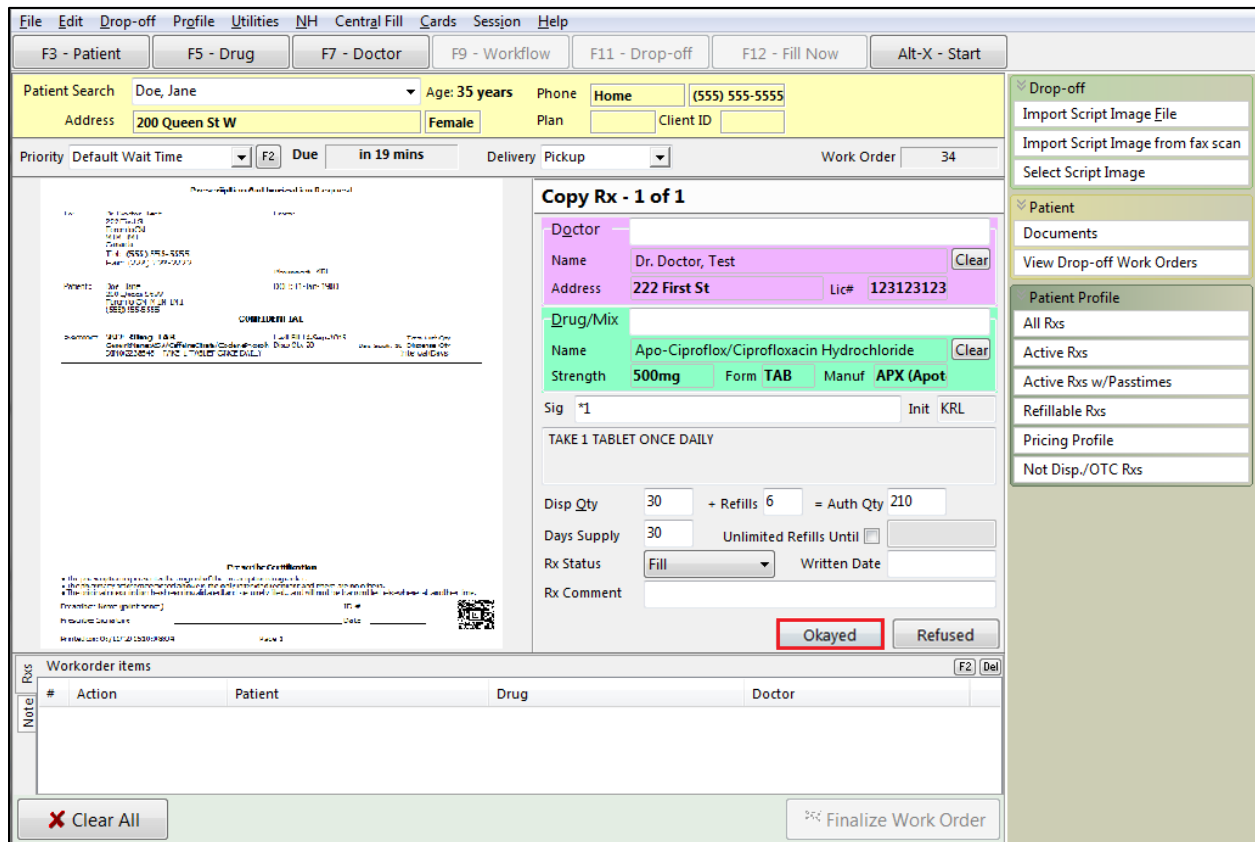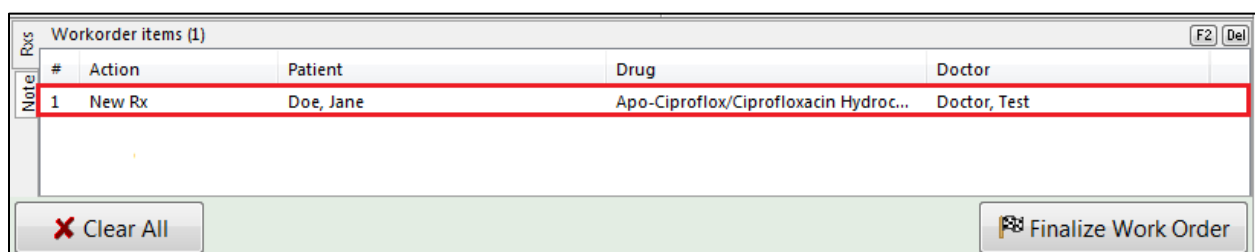
Use to process prescriptions

The **F11 - Drop-off** form will appear with the original fill parameters of the faxed Rx. Make any necessary changes to the Rx. Click **Okayed**.

The Rx will be added to the **Workorder items** frame.

If the Prescription Authorization Request contains additional Rxs, the original fill parameters of the next faxed Rx will populate. Make any necessary changes and click **Okayed** for each Rx included in the fax.

When each Rx has been added to the **Workorder items** pane, click **Finalize Work Order**. A To Do record will be created for each Rx.

NOTE: If you click **Refused** instead of **Okayed**, no To Do record will be created for the Rx.

Forward as fax

The **New Fax Message** screen will appear with the fax image attached. Select a recipient and click **Send**.
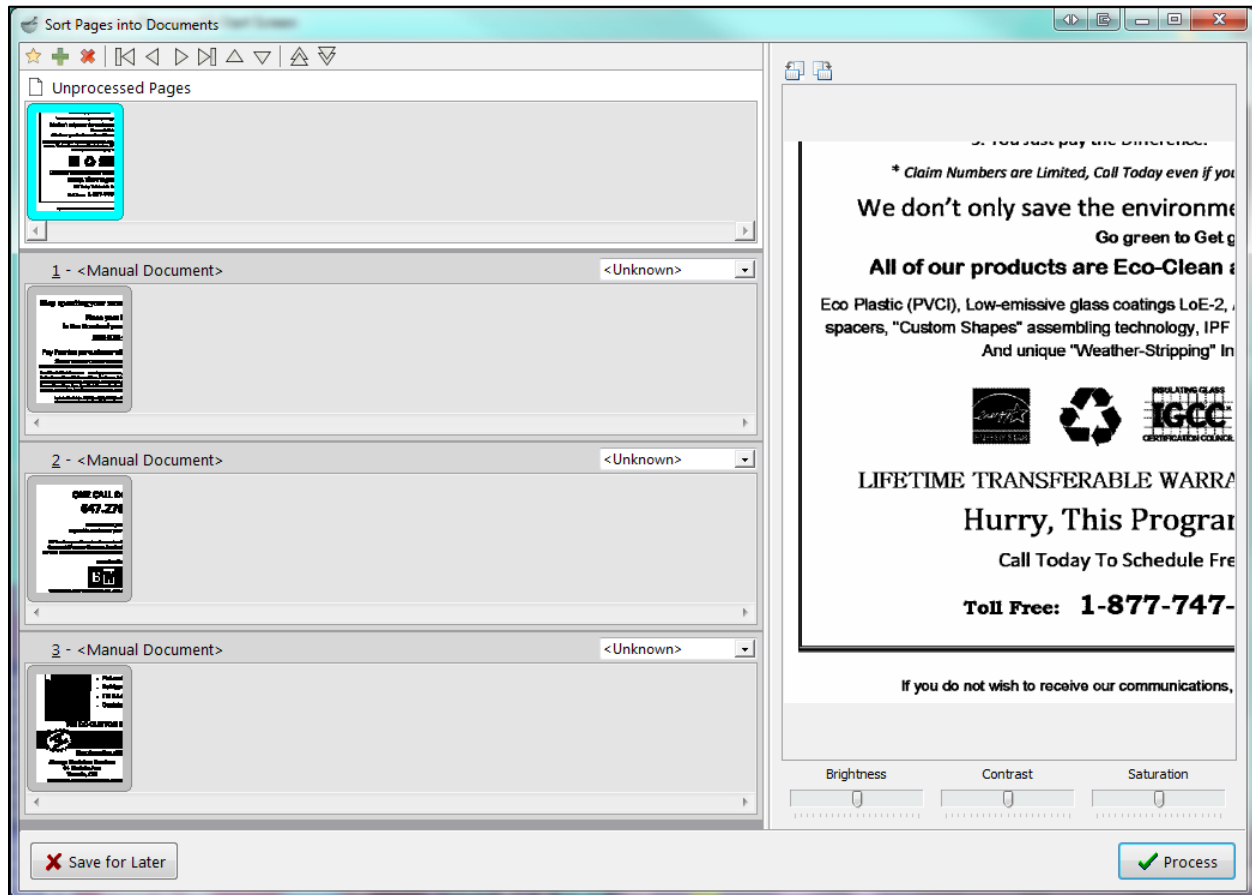
Modifying an Inbound Document

1. Double-click the fax you want to modify.

2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be modified. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.
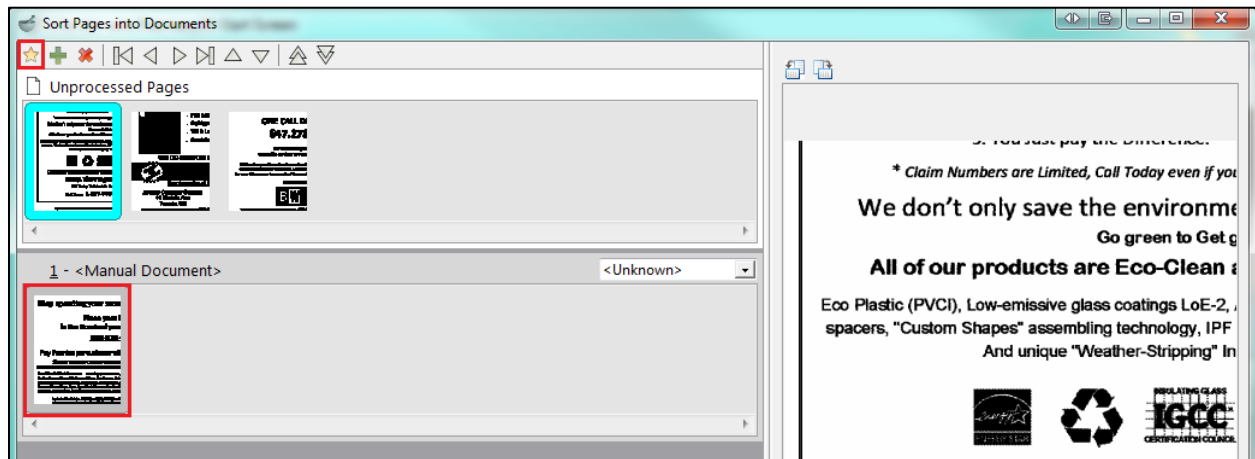
3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.
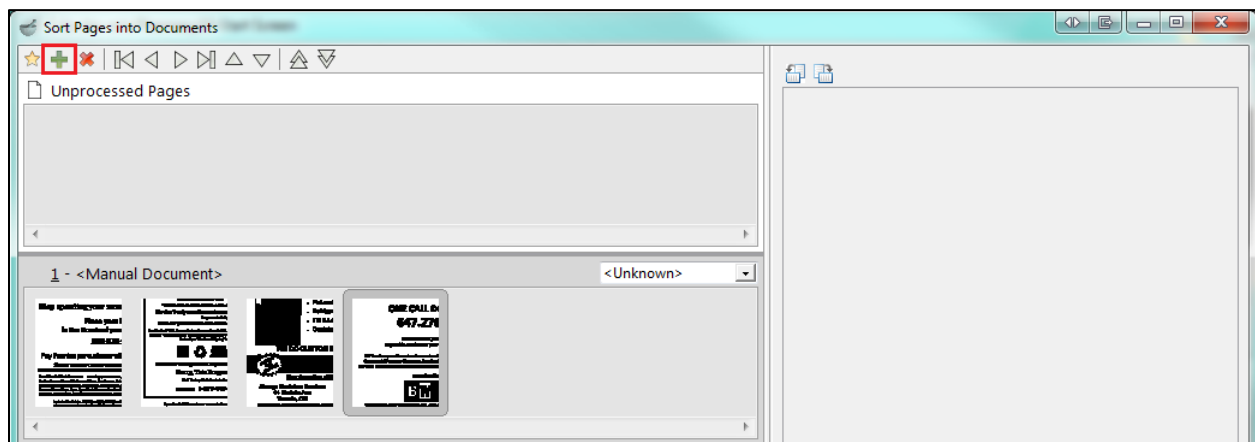
If you want to modify each page separately, click the star icon instead of the plus sign icon for the subsequent pages. Each page will appear in a separate **<Manual Document>** pane and can be modified independently.


4. Use the **Brightness**, **Contrast**, and **Saturation** controls to adjust the colour display.

5. Click **Process** to save the changes you made to the document.

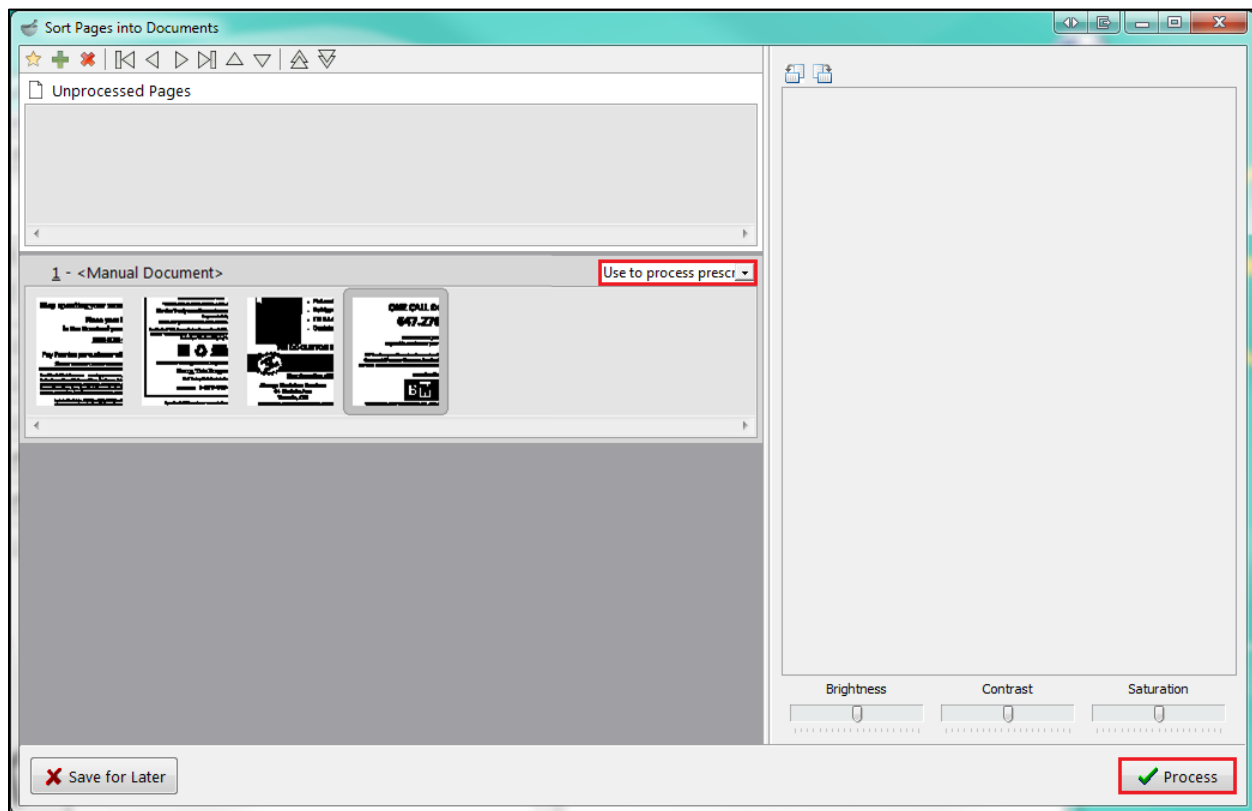# Using an Inbound Document to Process a Prescription

1. Double-click the fax you want to use for a prescription.

2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be used. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.
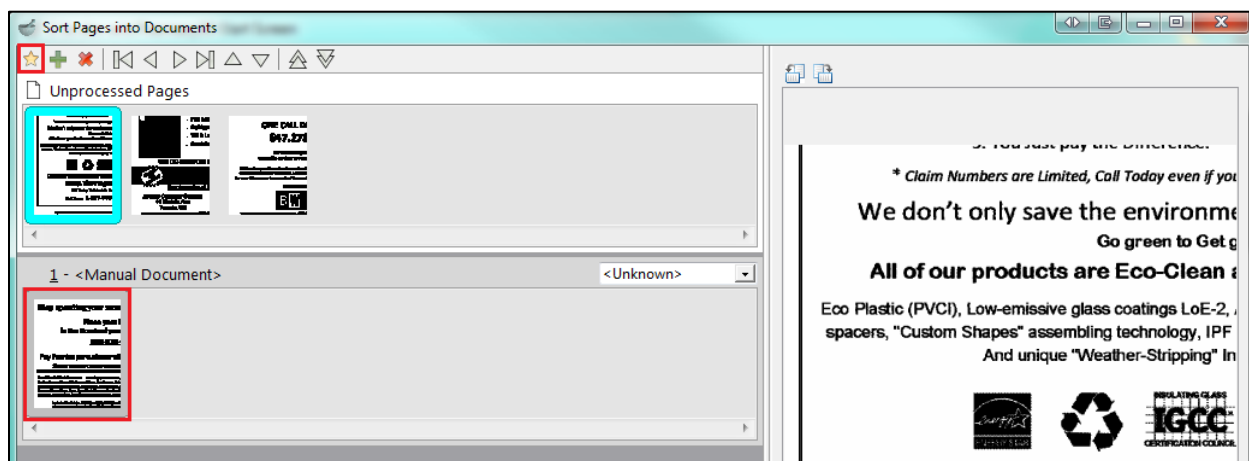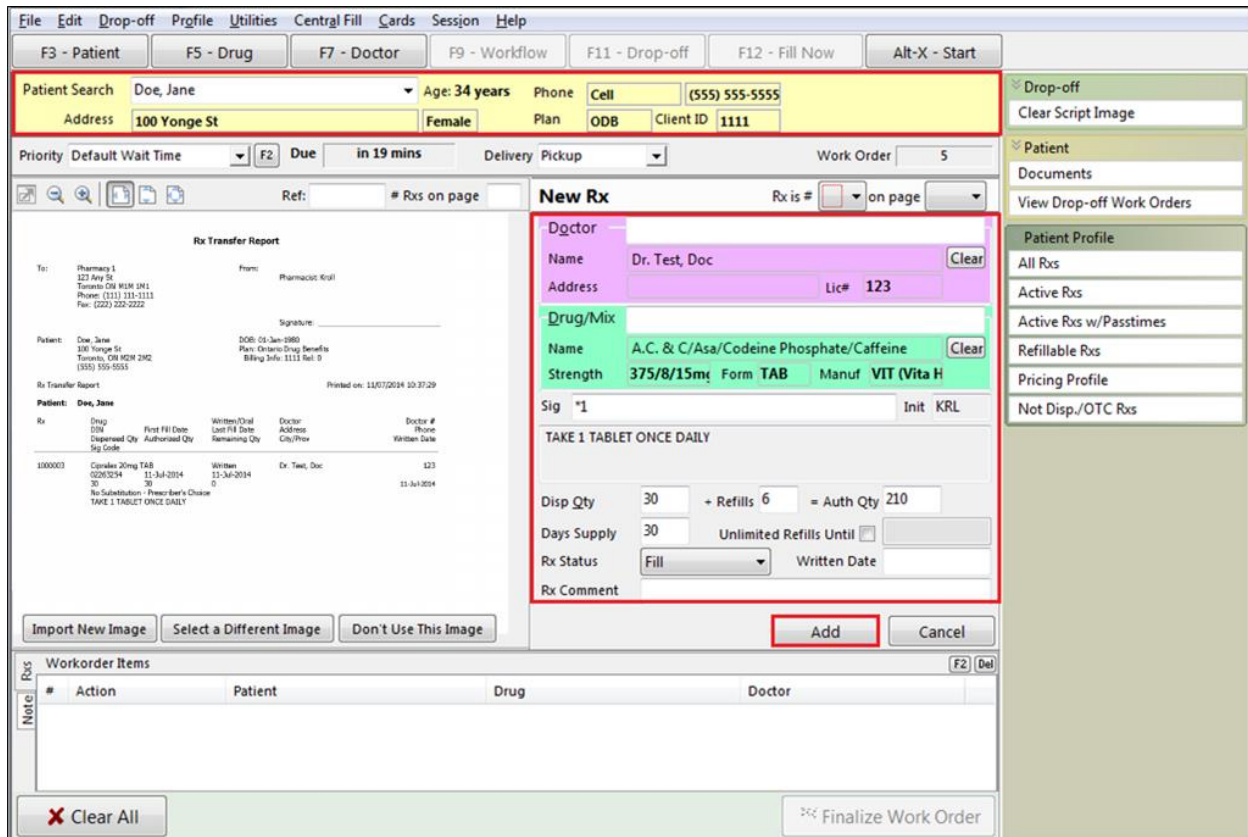

3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.
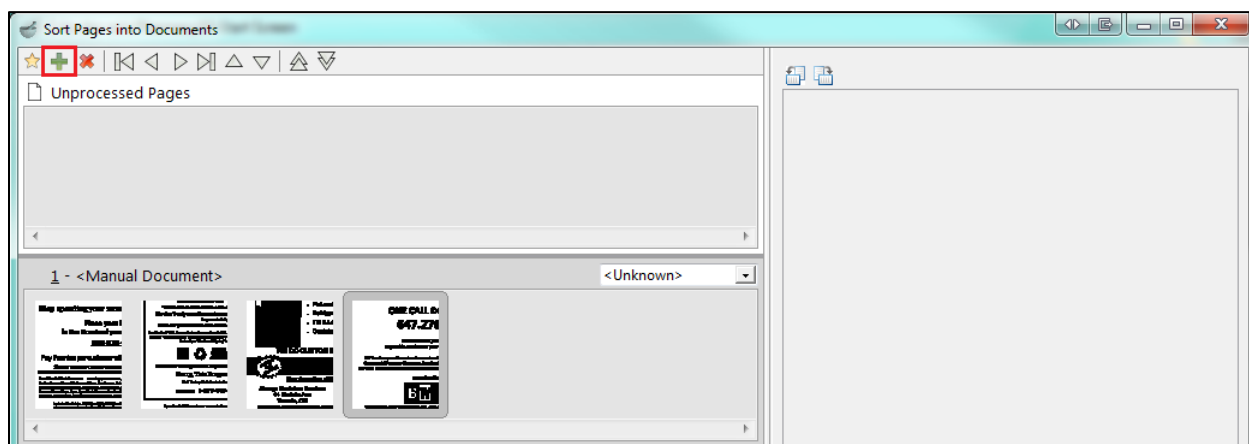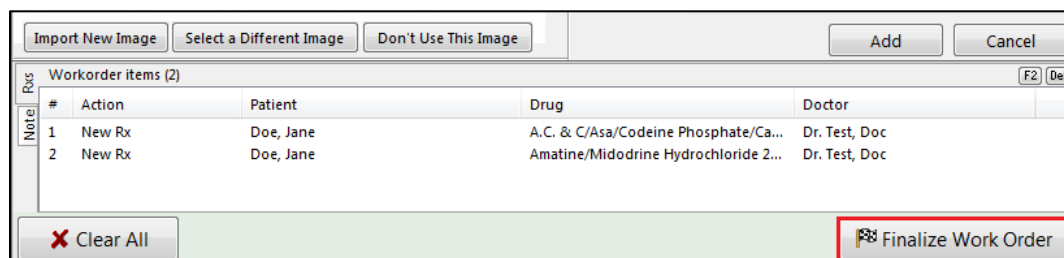
4. Select **Use to process prescription** from the dropdown menu and click **Process**.

5. The **Drop-off** screen will appear. Enter the required patient, doctor, and drug information and click **Add**.


6. The Rx will appear in the **Workorder Items** pane. Repeat step 5 for each Rx you want included in the work order. When you are finished, click **Finalize Work Order**.
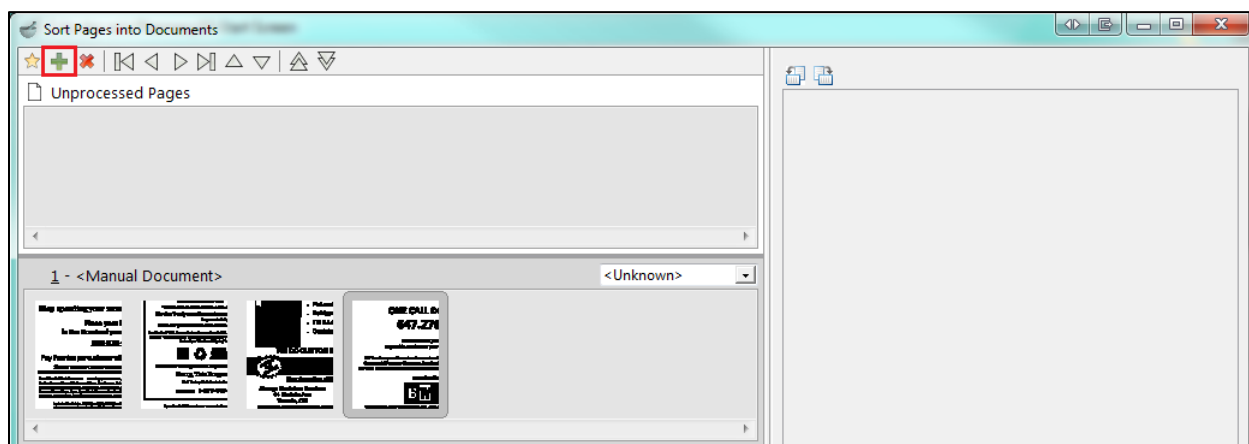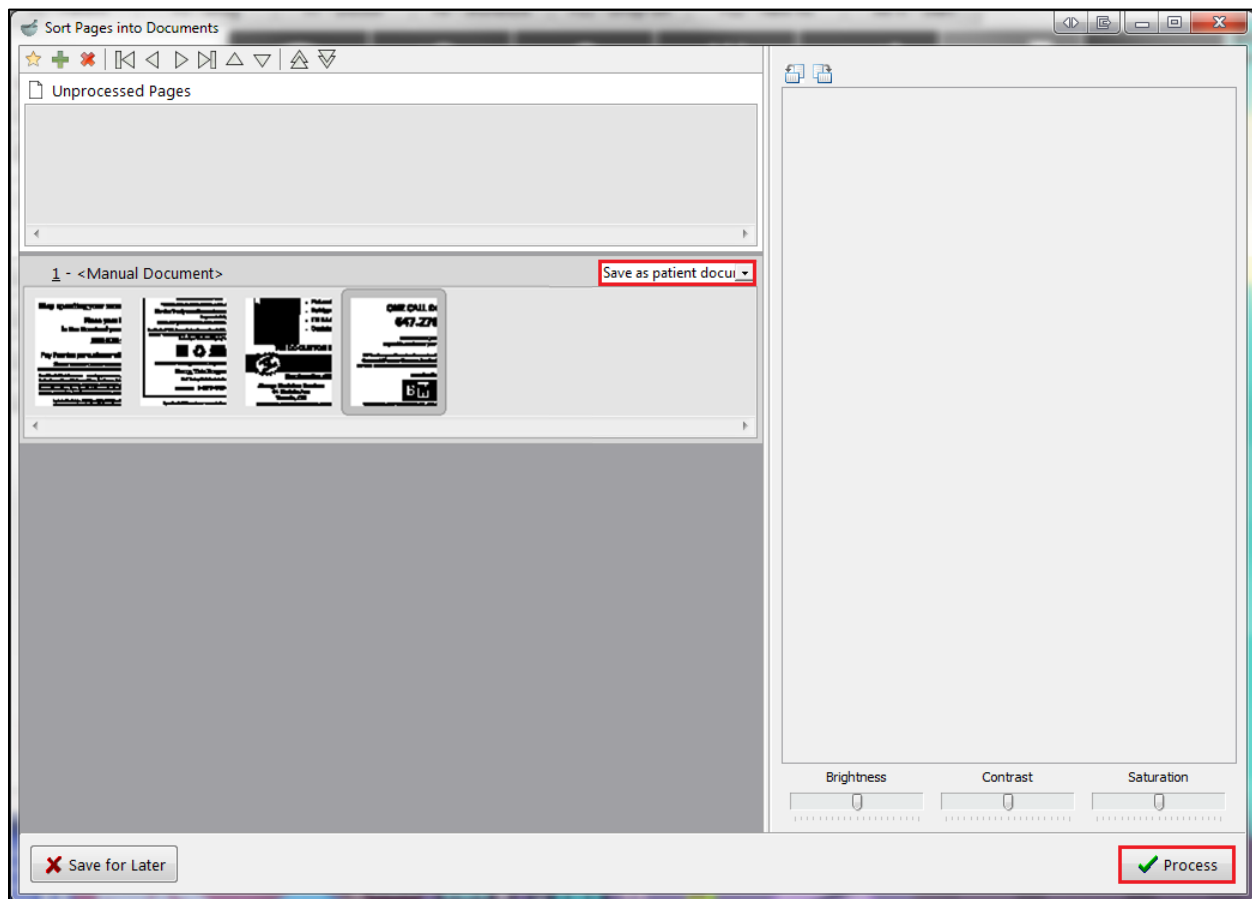
Saving as a Patient Document

1. Double-click the fax you want to save as a patient document.

2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be used. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.
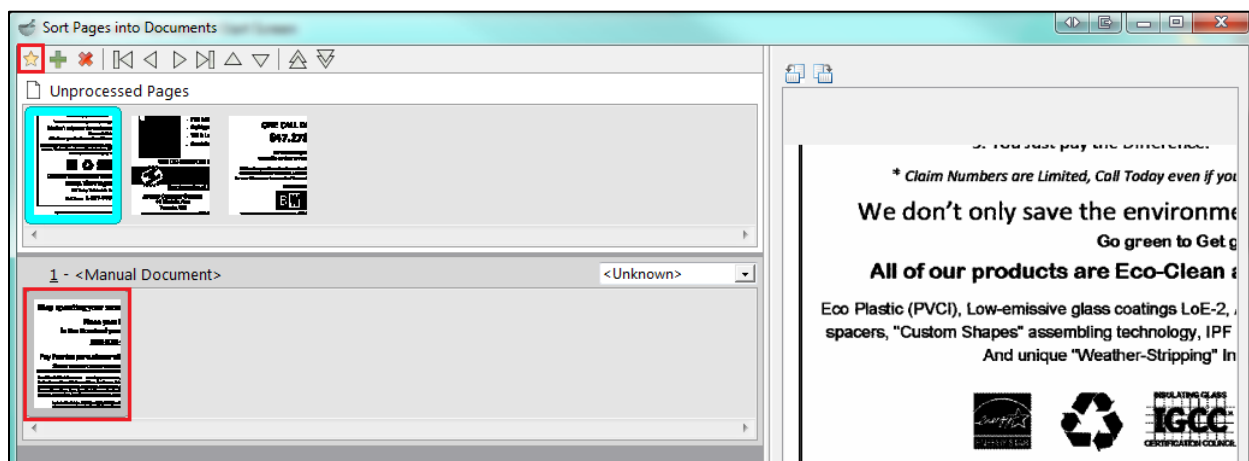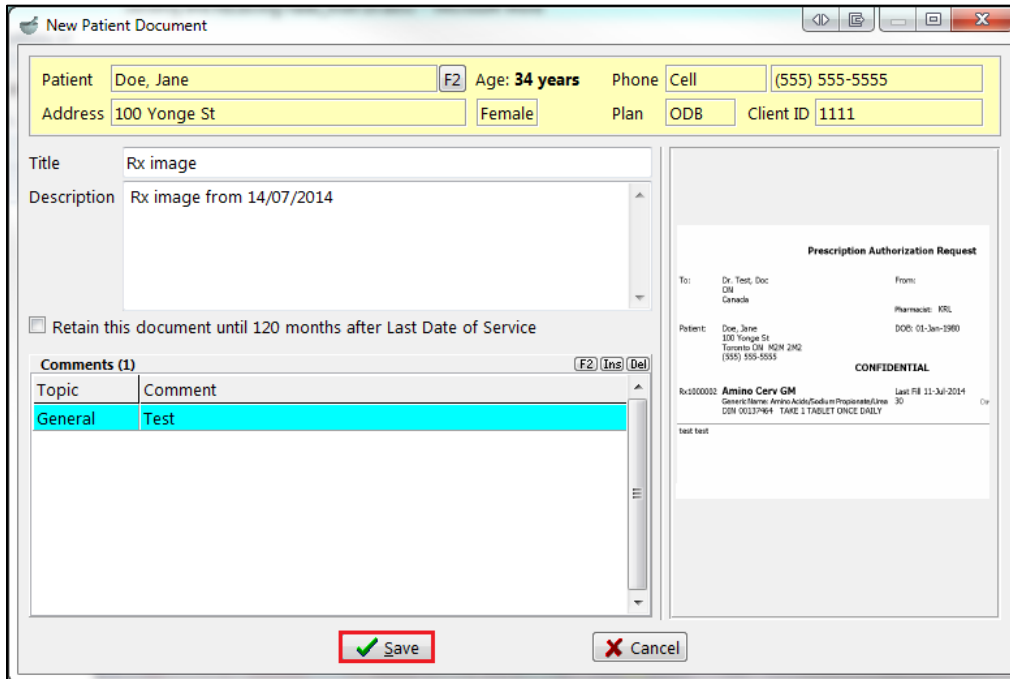

3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.

4. Select **Save as patient document** from the dropdown menu and click **Process**.

5. The **New Patient Document** screen will appear. Click **F2** to perform a patient search. Enter a title and description and any applicable comments. When you are finished, click **Save**.
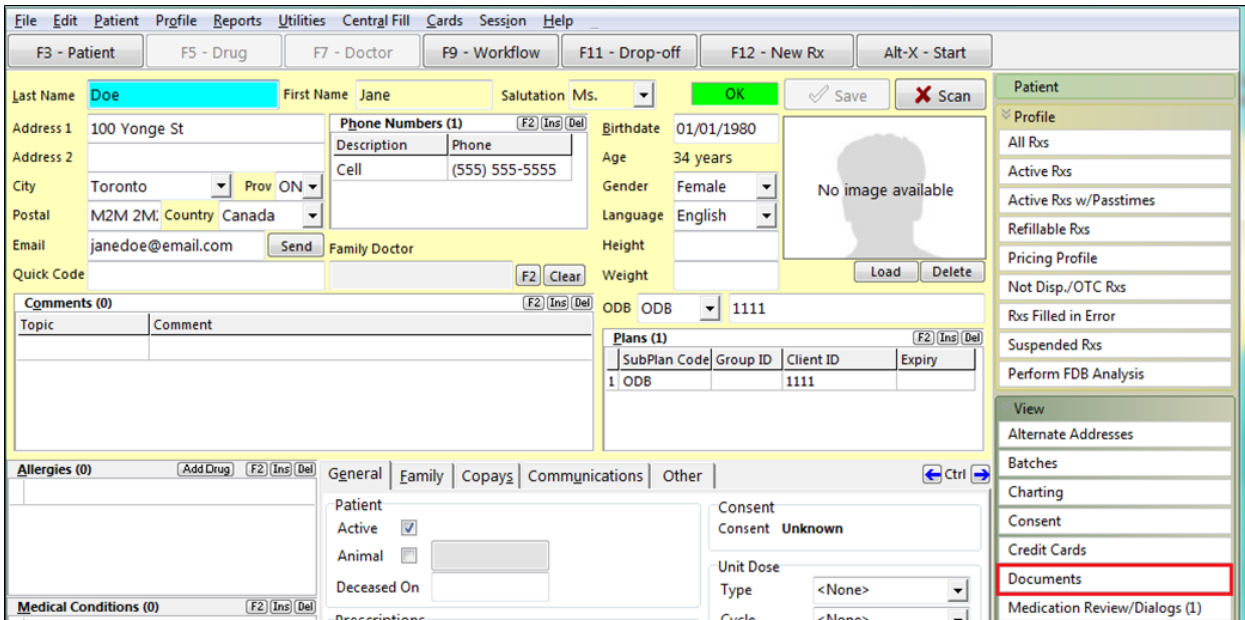
The document will be added to the patient's documents. To view the document, call up the Patient Profile and select **Documents** from the right navigation pane.


The **Patient Document List** screen will appear. Double-click a document view its contents.

Outgoing Faxes

Outgoing faxes are located at the top of the default view on the **Alt-X Start** screen. When sending a fax or mail message, you have the option to include an existing script image from your computer or scan a new image. Please refer to your scanner's user manual for operation instructions.

Sending a Fax

1. Select the **Outbound Fax** tab and click **New Fax**.
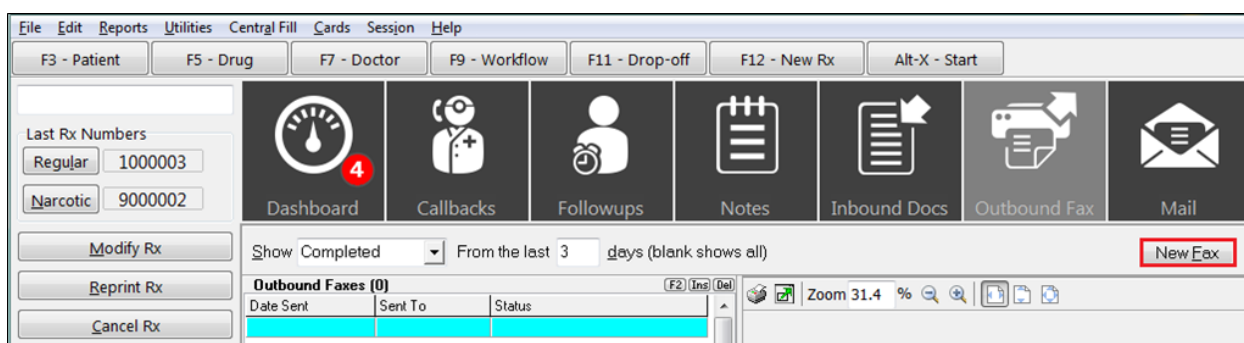
2. Click **Attach Document**. Select **From Fax/Network Scan** to scan a new image, or select **From Other File** to upload an image from your computer.
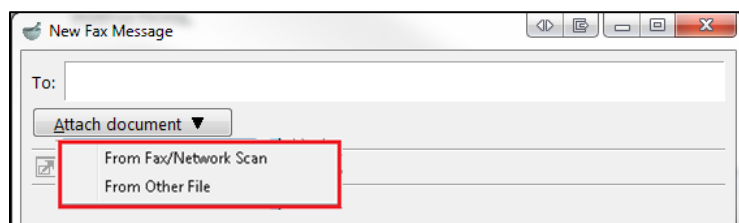

- If you selected **From Fax/Network Scan**, feed the script through your scanner, as shown:

- If you selected **From Other File**, locate the document you want to attach and click **Open**. The image will display in the **Picture Importer** window. Use the **Brightness**, **Contrast**, and **Saturation** controls to adjust the colour display. When you are finished, click **Save**.
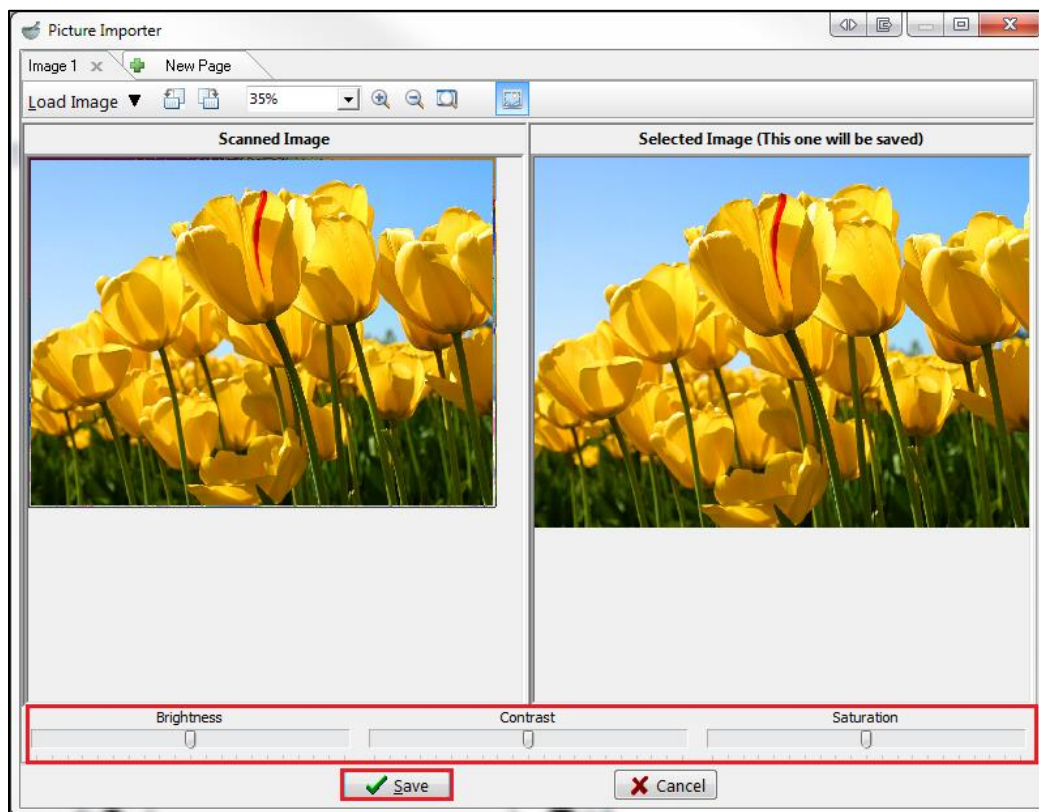
3. Enter the recipient's fax number in the **To** field and press the **Enter** key on your keyboard. Click **Send**.
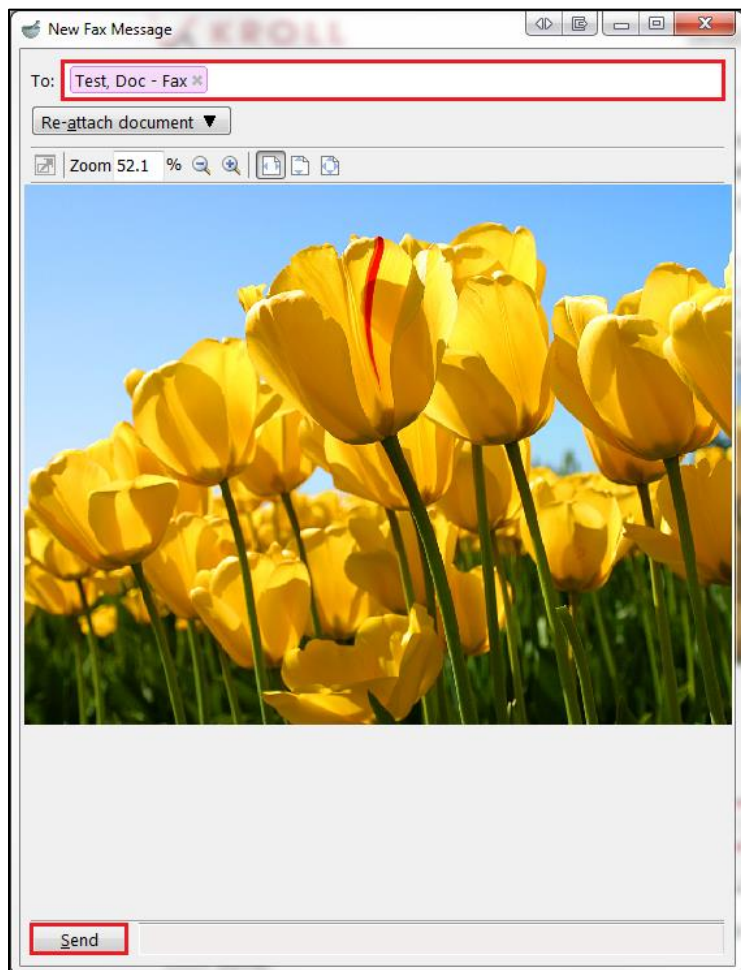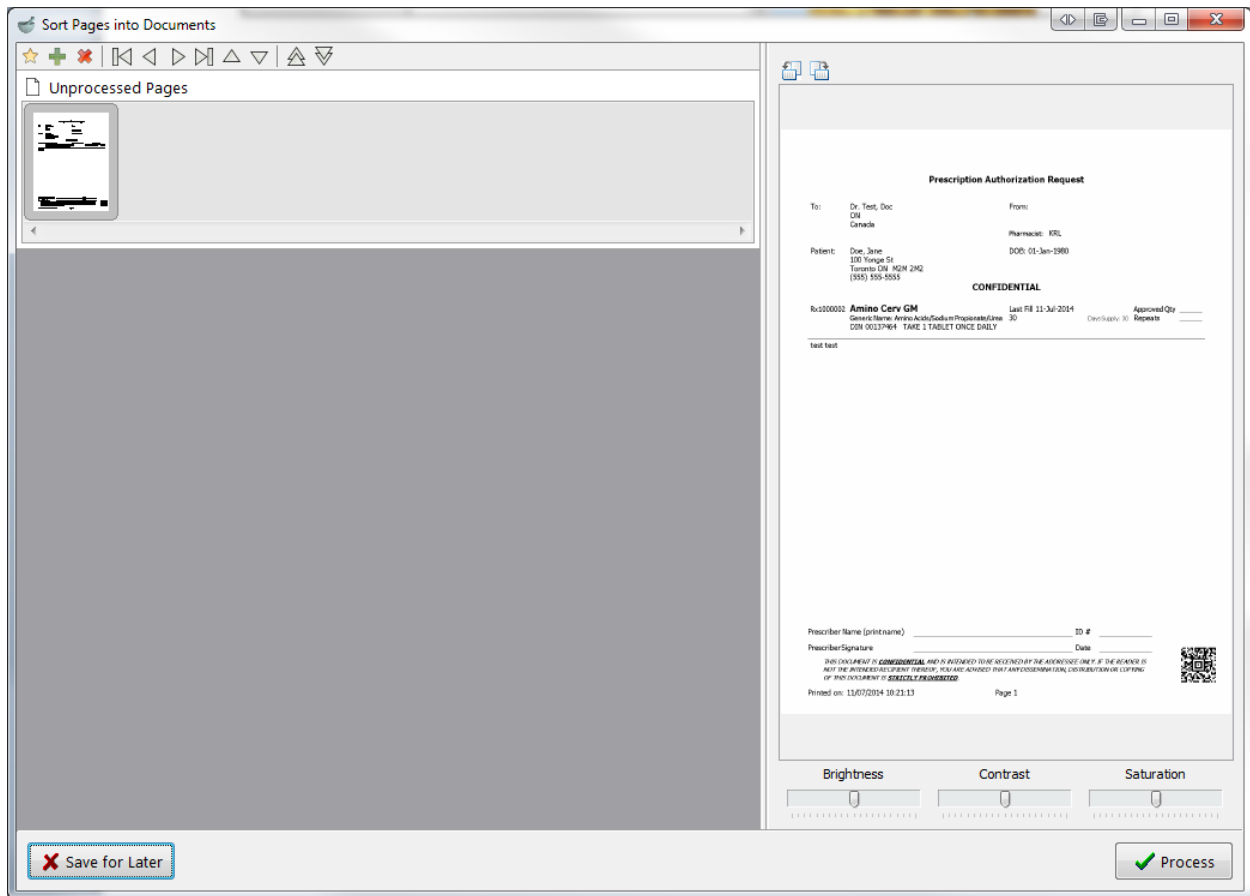
4. When the fax has been transmitted, it will show a status of **Completed Successfully**.
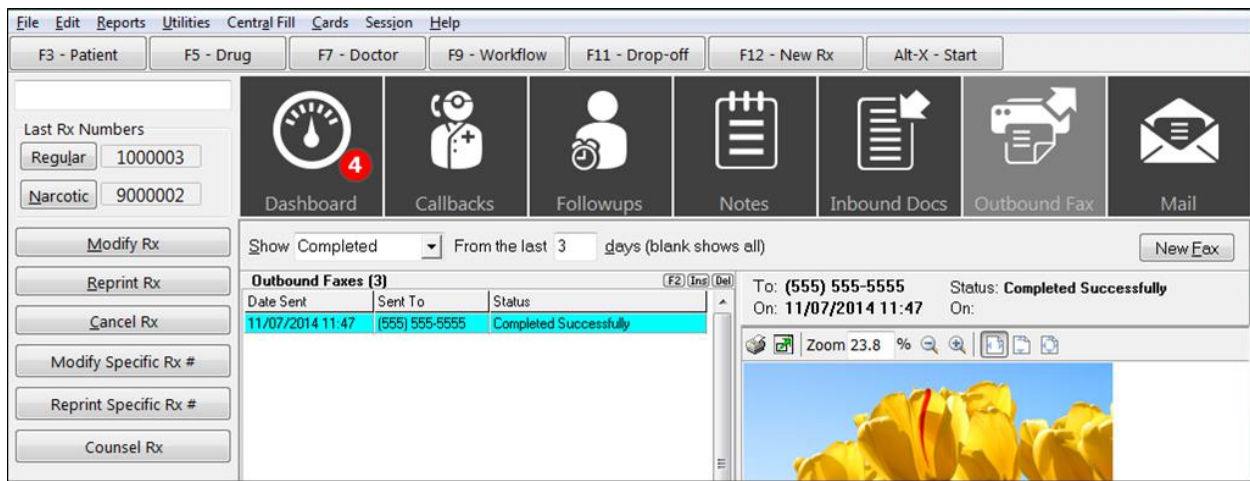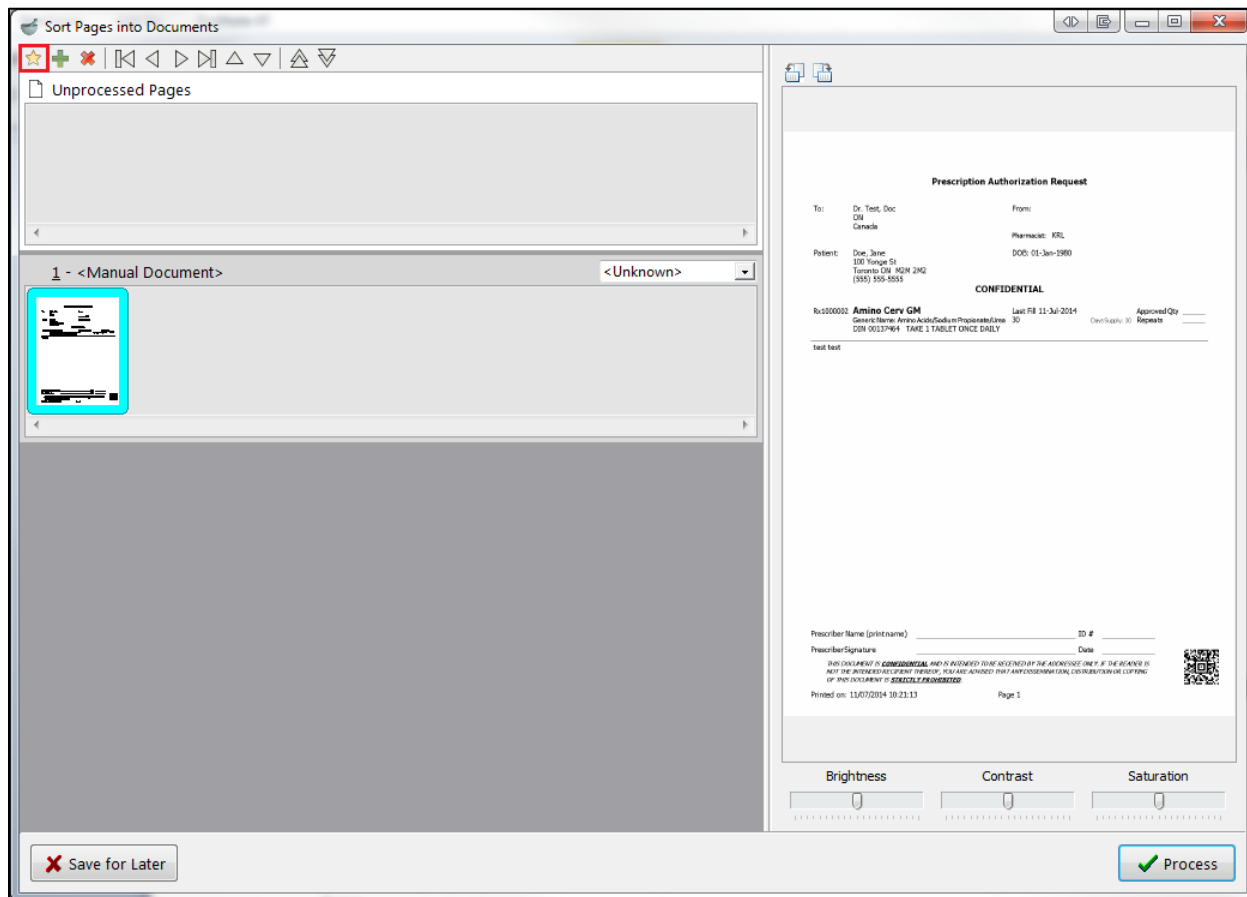

Sending as Mail

1. Double-click the document you want to send as a mail message. The document will appear in the **Unprocessed Pages** section of the **Sort Pages into Documents** screen.

2. The page(s) in the document must be added to a manual document before they can be used. To do so, select the first page and click the start icon. The page will appear in the **<Manual Document>** pane.


3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.

4. Select **Forward as mail message** from the dropdown menu in the **<Manual Document>** pane and click **Process**.
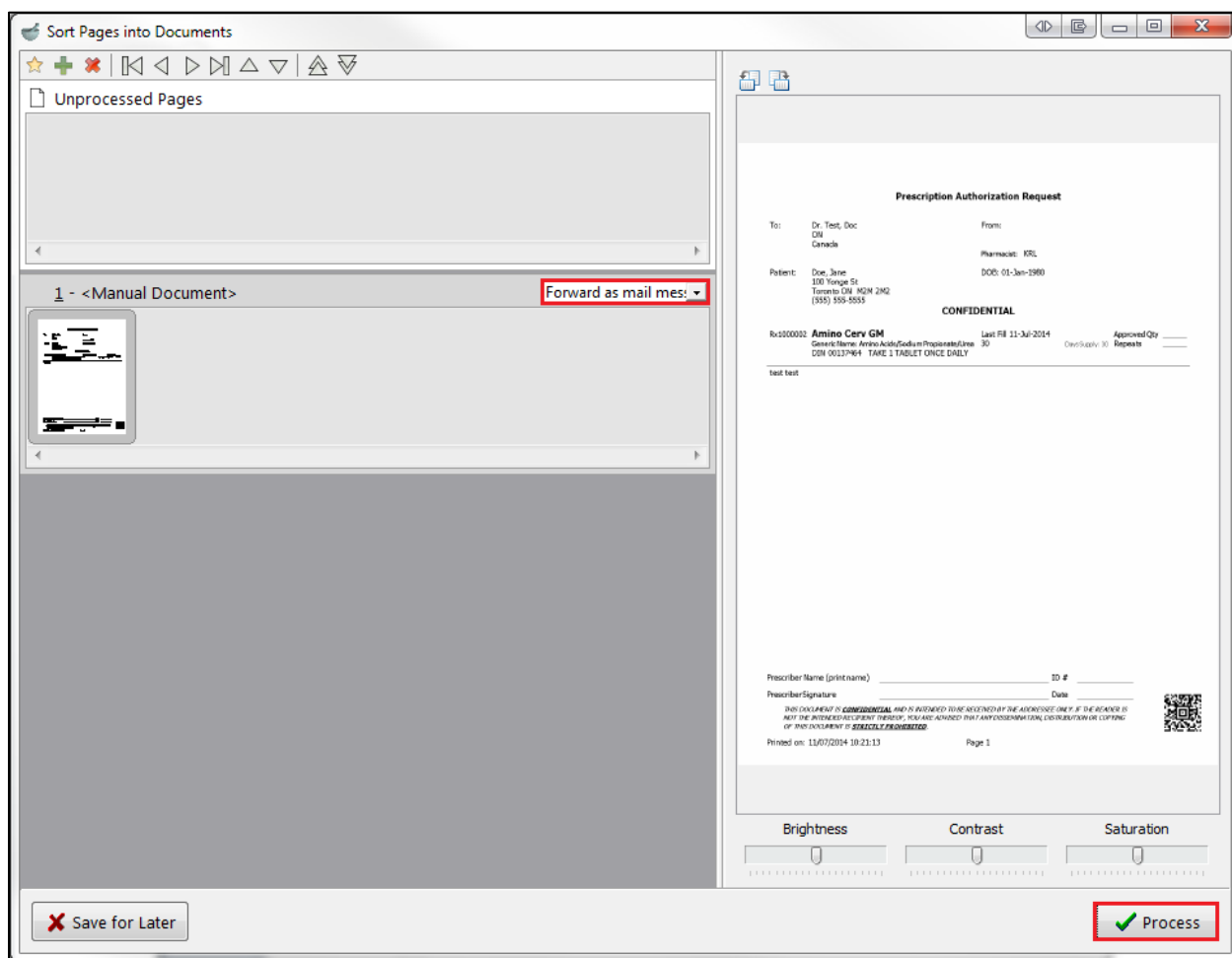
5. The **New Mail Message** window will appear. Enter the recipient's user initials and any body text you want included with the mail message. You can send this message to additional recipients by entering more user initials in the **To:** field. When you are finished, click **Send**.
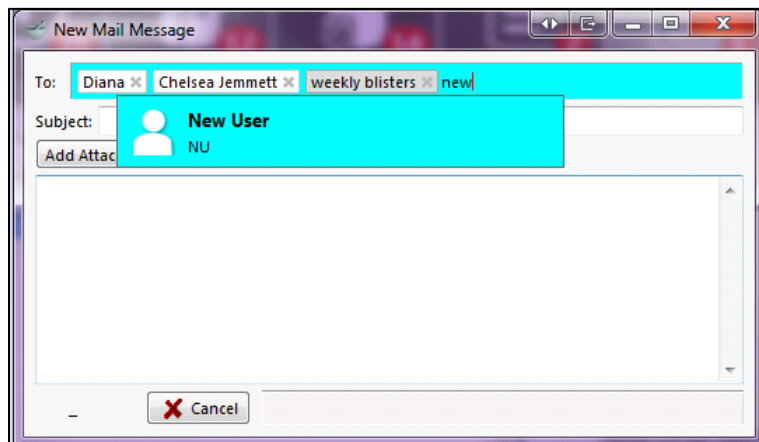
The mail message will appear in the **Sent Mail** folder (accessed via the **Mail** dashboard icon).
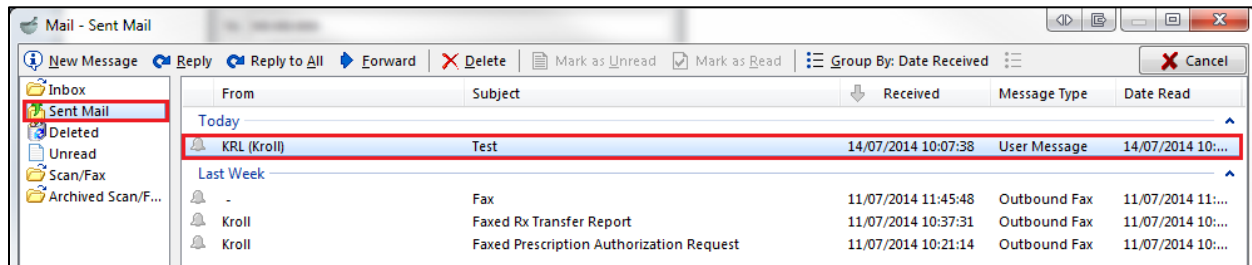
NOTE: Mail messages can be sent to Kroll users only.

Printing and Deleting

This section explains how to print and delete faxes.

To print a fax:

Select the fax you want to print and click the **Print** icon.

To delete a fax:

Right-click the fax you want to delete and select **Delete**.