Faxing MD Orders and Interim Orders Process Guide

Provider and User Guide

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Faxing MD Orders and Interim Orders

Overview

DISCLAIMER
The fax feature is activated by System Administration. Please contact HHAX Support Team for details, setup, and guidance.

This category covers the **MD Orders** and **Interim Orders** fax functionality in the HHAeXchange (HHAX) system. For comprehensive guidance and instructions on how to create and manager MD Orders and Interim Orders, refer to the Clinical Section category.

MD Orders and **Interim Orders** can be faxed directly from the system. To access a Patient's MD Orders and Interim Orders, navigate to the Patient MD Order page (***Patient > Patient Search > MD Orders***).

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Customer Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAeXchange

Faxing MD Orders and Interim Orders

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Status Change

The **MD Orders** and **Interim Orders Status** must have a _Complete_ status for the *Print* or *Fax* options to be available. Items with an _In Progress_ status can neither be printed nor faxed.

Once an MD Order is _Complete_, the **Fax** and **Print** options become available (as illustrated in the following image). The various icon colors indicate whether the fax functionality is available. To fax an MD Order, click the **Fax** icon to the right of the **Print** button (as seen in the image below). A black-colored icon indicates that the order is available to fax.

Patient MD Orders Screen

Fax Log Legend

Click the **Legend** button to access the descriptions of the Status colors (as illustrated in the image below).

Fax Log Legend Window

Once faxed, the icon appears in orange and the Status changes to _Sent_. Hover over the icon to view fax details such as **Date Sent**, **User** (Sender), and the **Fax Status**.

MD Order: (Fax) Sent Status

Note: Faxes can only be sent to an assigned Physician with an associated fax number on record.

Order Tracking Page

On the *Order Tracking* (***Action > Order Tracking***) page, select the required **Office** field and click the ***Search*** button to generate a search.

Order Tracking Search

On the results panel, a **Fax Status** column with a ***Fax*** icon facilitates faxing and printing directly from the page (as pictured in the following image).

The various colors indicate and correspond to the Status (as shown in the Fax Log Legend section of the **Faxing MD Orders and Interim Orders** topic):

- ***Black*** icon signifies that the order is ready to fax;
- ***Orange*** icon indicates that the fax is in progress;
- ***Red*** icon indicates a failed fax attempt; and,
- ***Gray*** icon means that the order is progress (not yet completed).
- ***Green*** icon indicates that the fax transmission is complete and successful.

Order Tracking Page

Faxing from the Order Tracking Page

To fax a single record, select the *checkbox* (far-left) and click the **Fax** icon (far-right) to fax a Patient's Clinical Documentation to the Physician on record. To fax multiple records, select the applicable *checkboxes* and click the **Fax** button (as shown in the following image).

Faxing Multiple Orders

Note: Faxes can only be sent to an assigned Physician with an associated fax number on record.

Once faxed, the Status changes to *Sent* and the system updates the **Status** and **Sent Date** of all sent orders (as shown in the image below).

Faxed Orders

*Note: The system is set to reprocess fax attempts up to 5 times before a **Fail** status.*

Fax Validation Summary

The image below illustrates the *Validation(s)* window summarizing a list of attempted faxes. This summary includes successful and unsuccessful attempts with the corresponding validation **Reason** of failure such as **No fax number available** or **Previous fax still in progress**.

Unsuccessful Fax Attempts

If a fax attempt fails, the icon appears in red (as illustrated in the image below). Hovering over the icon provides a pop-up window indicating the **Date Sent**, **User** (Sender), and the **Fax Status**.

Failed Fax Attempt

The **Sent Date** field becomes *blank*, and the system checks for any faxes in the sending process. There-after, the system prompts the user with a confirmation message to **OK** (continue) or **Cancel**.

Select...	To...
OK	Continue. The system marks the request as Failed with "Cancelled by User" reason.
Cancel	Cancel the entire operation. The system prompts for a confirmation to ensure cancellation of the pending fax.

All other valid changes are saved on the *Order Tracking* page. The records which meet the same conditions as in the scenarios for MD Order and Interim Order are presented in the grid.

Order Tracking Page: Edit MD/Interim Order Information Screen

To re-fax an MD or Interim Order, ensure that the **Doc Status** is either *Complete* or *Printed*. Select the *checkbox* to the far-left and click the **Fax** button.

Refaxing an MD/Interim Order

Fax MD Order Cover Sheet

In accordance with HIPAA Regulations, a fax cover sheet is added to the Fax MD Order and Interim Order fax transmissions intended to safeguard sensitive information such as Protected Health Information (PHI). The following images illustrate samples of the cover sheets for MD Order and Interim Order, respectively.

MD Order Fax Cover Sheet

Interim Fax Cover Sheet

Note: In the case of multiple orders, if the **To** and **From** fields are the same, then one cover sheet suffices; however, if these fields differ then two separate cover sheets are issued.