



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

# Faxing MD Orders and Interim Orders

**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*).

## 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 Info - Active		Admission ID: EXQ-900020598537881		Patient ID:		Contract:	
Name: Harrison George DOB: 02/25/1945		Primary Alt. Patient ID:		Home Phone: 305-505-5050		Address: 987 Penny Lane, MIAMI, FL, 33130	
Coordinators: HHA_Coordinator		Office: Excellence QA Team		Languages: English			






MD Orders					Legend	
ID	Cert Period	Creation Date	Status	Add	Print	Fax
485-318408	02/20/2018 - 04/20/2018	02/20/2018	Complete	X	Print	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**

-  In Progress: The order is still in progress and not yet ready to be faxed. The order cannot be faxed until all information has been entered and the status is updated.
-  Ready: The fax information is valid and ready to be sent when initiated by the user.
-  Pending: A fax request has been generated, but the fax processing has not yet completed. Review the Admin > Process Monitor page for more details.
-  Successful: The fax has completed processing and was sent successfully.
-  Failed: The fax has completed processing, but encountered an error and could not be sent successfully.

[Close](#)

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 Orders				Legend		
ID	Cert Period	Creation Date	Status	Add	Print	
485-318408	02/20/2018 - 04/20/2018	02/20/2018	Sent	X	Print	
		Date Sent	User	Fax Status		
		02/20/2018 02:52 PM	Lisset Vega[lvegae]	Pending		

### 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.

Admission ID	Patient Name	Patient Status	Office	Coop	Doc ID	Doc Type	Doc Status	Printed Date	Sent Date	Signed Date	Fax Status
485-151704	MD	Signed	04/13/2017	07/07/2016	07/07/2016	[Fax Icon]					
485-151713	MD	Signed	04/13/2017	07/07/2016	07/07/2016	[Fax Icon]					
485-154954	MD	Printed	05/29/2017	Clear		[Fax Icon]					
485-154958	MD	Printed	05/29/2017	Clear		[Fax Icon]					
485-154963	MD	Complete				[Fax Icon]					
485-315874	MD	Printed	02/14/2018	Clear		[Fax Icon]					
485-316916	MD	In Progress				[Fax Icon]					
485-318148	MD	In Progress				[Fax Icon]					
485-315066	MD	Printed	02/12/2018	Clear		[Fax Icon]					
485-317600	MD	Sent	02/19/2018	02/19/2018		[Fax Icon]					
485-315487	MD	Sent	02/13/2018	02/13/2018		[Fax Icon]					
485-318408	MD	Sent	02/20/2018	02/20/2018		[Fax Icon]					
INT-116844	INT	Complete				[Fax Icon]					
INT-117470	INT	Sent		02/20/2018		[Fax Icon]					

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).

Admission ID	Patient Name	Patient Status	Office	Coordinator	Cert Period	Interim Order Date	Physician	Nurse	Doc ID	Doc Type	Doc Status	Printed Date	Sent Date	Signed Date	Fax Status
<input type="checkbox"/> HHA-900020598537885	Benjamin Mark	Active	HHAExchange Office	James Anderson	01/19/2018 - 03/21/2018		House Greg	Betty Burke	485-318915	MD	Sent	02/22/2018	02/22/2018		
<input type="checkbox"/> HHA-900020598537886	Alonso Berta	Active	HHAExchange Office	James Anderson	02/01/2018 - 05/01/2018		House Greg	Betty Burke	485-319175	MD	Sent	02/22/2018	02/22/2018		
<input type="checkbox"/> HHA-900020598537887	Bennis Elaine	Active	HHAExchange Office	James Anderson	02/05/2018 - 05/05/2018		House Greg	Betty Burke	485-319195	MD	Sent	02/22/2018	02/22/2018		
<input checked="" type="checkbox"/> HHA-900020598537885	Benjamin Mark	Active	HHAExchange Office	James Anderson	01/19/2018 - 03/21/2018	02/22/2018	House Greg	Carrucci Sandra	INT-117702	INT	Printed	02/22/2018 Clear	02/22/2018		
<input checked="" type="checkbox"/> HHA-900020598537887	Bennis Elaine	Active	HHAExchange Office	James Anderson	02/05/2018 - 05/05/2018	02/22/2018	House Greg	Carrucci Sandra	INT-117703	INT	Printed	02/22/2018 Clear	02/22/2018		

### 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).

Admission ID	Patient Name	Patient Status	Office	Coordinator	Cert Period	Interim Order Date	Physician	Nurse	Doc ID	Doc Type	Doc Status	Printed Date	Sent Date	Signed Date	Fax Status
<input type="checkbox"/> HHA-900020598537885	Benjamin Mark	Active	HHAExchange Office	James Anderson	01/19/2018 - 03/21/2018		House Greg	Betty Burke	485-318915	MD	Sent	02/22/2018	02/22/2018	02/22/2018	
<input type="checkbox"/> HHA-900020598537886	Alonso Berta	Active	HHAExchange Office	James Anderson	02/01/2018 - 05/01/2018		House Greg	Betty Burke	485-319175	MD	Sent	02/22/2018	02/22/2018	02/22/2018	
<input type="checkbox"/> HHA-900020598537887	Bennis Elaine	Active	HHAExchange Office	James Anderson	02/05/2018 - 05/05/2018		House Greg	Betty Burke	485-319195	MD	Sent	02/22/2018	02/22/2018	02/22/2018	
<input checked="" type="checkbox"/> HHA-900020598537885	Benjamin Mark	Active	HHAExchange Office	James Anderson	01/19/2018 - 03/21/2018	02/22/2018	House Greg	Carrucci Sandra	INT-117702	INT	Sent	02/22/2018	02/22/2018	02/22/2018	
<input checked="" type="checkbox"/> HHA-900020598537887	Bennis Elaine	Active	HHAExchange Office	James Anderson	02/05/2018 - 05/05/2018	02/22/2018	House Greg	Carrucci Sandra	INT-117703	INT	Sent	02/22/2018	02/22/2018	02/22/2018	

### 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**.

Patient Name	Admission ID	Office	Cert Period	Physician	Nurse	Doc ID	Reason
Bhosale Pradip	EXQ-1291380792	Excellence QA Team	(12/02/2016 - 12/02/2016)	Testing MD Order	66453 SkilledCG (Inactive)	485-230067	No fax number available
Bhosale Pradip	EXQ-1291380792	Excellence QA Team	(07/21/2016 - 08/19/2016)	Testing MD Order	Bagul Ganesh1	485-154956	Previous fax still in progress
Bhosale Pradip	EXQ-1291380792	Excellence QA Team	(12/01/2016 - 12/01/2016)	Testing MD Order	66453 SkilledCG (Inactive)	485-230066	Previous fax still in progress
Bhosale Pradip	EXQ-1291380792	Excellence QA Team	(10/19/2016 - 11/17/2016)	Testing MD Order	66453 SkilledCG (Inactive)	485-158092	Previous fax still in progress

## Fax Validation(s) Summary Window

## 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**.

Admission ID	Patient Name	Patient Status	Office	Doc ID	Doc Type	Doc Status	Printed Date	Sent Date	Signed Date	Fax Status
HHA-2340777	Baker Danny	Active	HHAExchange Office	485-282072	MD	Printed	11/06/2017	Clear		
HHA-234532453425	Pandey Sushant	Active	HHAExchange Office	485-249890	MD	Printed	09/23/2017	Clear		
HHA-MB2607	Michael Bevan	Active	HHAExchange Office	485-253082	MD	In Progress				

Date Sent	User	Fax Status
11/06/2017 01:56 AM	Vidula Modi [VidulaML]	Failed: Attempting to fax to a number that is not the designated fax number in a developer account.

Failed Fax Attempt

The **Sent Date** field becomes *blank*, and the system checks for any faxes in the sending process. Thereafter, 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

Doc Type: Interim order | Status: All | Office: Excellence QA Team

Admission ID: | Interim Order Category: Select | Physician: |

Admission ID	Patient	Office	Coordinator	Cert Period	Interim	Physician	Nurse	Doc ID	Doc Type	Doc Status	Printed Date
EXQ-1291380792	Bhosale Dattatraya Pradip	Excellence QA Team	Kalpesh Pandey, Bert Bright, Cary Fort	(08/06/2016 - 08/06/2016)	08/06/2016	Testing MD Order	Bagul Ganesh1	INT-97326	INT	Sent	09/29/2017
EXQ-1291380792	Bhosale Dattatraya Pradip	Excellence QA Team	Kalpesh Pandey, Bert Bright, Cary Fort	(08/06/2016 - 08/06/2016)	08/06/2016	Testing MD Order	android arjun99	INT-97332	INT	Sent	10/06/2017

Save Cancel

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.



Print Fax

Search Results (14)

Legend Page 1 of 1

Admission ID	Patient Name	Patient Status	Office	Coordinator	Start Period	Interim Order Date	Physician	Nurse	Doc ID	Doc Type	Doc Status	Printed Date	Send Date	Stalled Date	Fax Status
<input type="checkbox"/> HHA-920004	Travis Calvin	Active	HHAExchange Office	Albert Noble	11/04/2015 - 12/04/2015		Adam Novan	Jackson Marie	HET-164218	MD	Complete				
<input type="checkbox"/> HHA-920004	Travis Calvin	Active	HHAExchange Office	Albert Noble	08/06/2016 - 08/06/2016		Adam Novan	Josher malaga	HET-168335	MD	Printed				
<input checked="" type="checkbox"/> HHA-23453245345	Pandey Sushant	Active	HHAExchange Office		07/19/2017 - 08/19/2017	07/20/2017	Adam Novan	Jackson Marie	HET-182305	INT	Printed	08/28/2017	Class		
<input type="checkbox"/> HHA-482627	Michael Bevan	Active	HHAExchange Office		07/26/2017 - 08/26/2017	07/26/2017	Jakson Micheal	Eben Cynthia	HET-182320	INT	Complete				

Save Print Fax

Ensure the Doc Status is either Complete or Printed

## 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.

**Fax Cover Sheet**

To: 1 Physician  
From: Excellence QA - ML : Excellence QA Team (refer to MD Order for phone and facsimile numbers)  
Date: 04/02/2018 06:08:28 PM  
Regarding: MD Orders for Review

Notice of Confidentiality: This facsimile and its attachments may contain privileged and confidential information and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This transmission is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended recipient, you are notified that any use, dissemination, distribution, printing or copying of this transmission is strictly prohibited and may subject you to criminal or civil penalties. If you have received this message in error or are not the named recipient, please notify us immediately by contacting the sender, and delete and destroy all copies of this message. Thank you.

MD Order Fax Cover Sheet

**Fax Cover Sheet**

To: 1 Physician  
From: Excellence QA - ML : Excellence QA Team (refer to Interim Order for phone and facsimile numbers)  
Date: 04/02/2018 06:10:34 PM  
Regarding: Interim Orders for Review

Notice of Confidentiality: This facsimile and its attachments may contain privileged and confidential information and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This transmission is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended recipient, you are notified that any use, dissemination, distribution, printing or copying of this transmission is strictly prohibited and may subject you to criminal or civil penalties. If you have received this message in error or are not the named recipient, please notify us immediately by contacting the sender, and delete and destroy all copies of this message. Thank you.

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.