# **Fax Documents**

Last modified on 08/27/2025 4:36 pm EDT

## Fax from within the patient chart | Fax clinical notes

You can fax from within the patient chart or a clinical note. You can also fax documents from a referral.

You can view your fax usage in Account > Account Settings > Usage tab.



# Fax from within the patient chart

You can fax documents, such as a locked clinical note or patient demographics, from within the patient chart.

#### Fax patient demographics

1. In a patient chart, select Fax demographics 💼 in the Patient Header.



The Fax Document window opens.

2. Complete the fields and then select Send Fax.

#### **Fax documents**

You can fax documents from any tab.

- 1. Select **Documents** from the sidebar menu and then select the tab where the document is.
- 2. Select Fax in the document's row.

Documents							
Upload images, scanned paper documents, or PDFs downloaded from other electronic medical records.							
Uploaded Documents Loc	Uploaded Documents Locked Clinical Notes		Outbound Referral	s Lab Results	Amendments 32		
Locked Clinical Notes							
Date of Service	Reason			Locked by	Locked On	Actions	
02/25/2022	Memory Test			Krystal Parker, MD	02/24/2022		Fax View Notes
02/14/2022	Back Pain			Krystal Parker, MD	02/14/2022		Fax View Notes

The Fax Document window opens.

2. Complete the fields and then select **Send Fax**.

# **Fax clinical notes**

You can fax the entire clinical note or one section.

### Fax a clinical note section

- 1. Open a clinical note.
- 2. Select the section (template/form) and then select Fax section.

H&P SOAP ADDITIONAL		View Appointment Quick History Copy Previous Note -						
Preview Note		Jenny (Jen) Harris (Female   44 years old   02/11/1980   HAJE000001)   Appt: 06/21/2024						
OnPatient / Check-In	25	New Patient Visit						
Subjective		Note Saved						
Objective								
Assessment		Apple Health App Data 🔤 Growth Charts 🔍 Vitals 🖨 Print section						

3. Complete the fields and then select **Send Fax**.

То	Sample Doctor, MD
Fax Number	+1 301-
Message	
Enhance Image	Enabling this function, would raise the contrast and brightness of the fax itself. In some cases, faxes with certain text/color discolorations would benefit by having this enabled.
	Send Fax

### Fax a clinical note

- 1. Open a clinical note.
- 2. Select **Preview Note** and then select **Fax**.

	H&P	SOAP	ADDITIONAL		Status: Not Locked	+ Amendments	Revisions	View	Fax	Sign & lock	Edit Sections	Print se	ctions
Preview Note			<b>A</b> To obance note format, aliak on Clinical >	Complete Note E	ormot	-							
OnPatient / Check-In		• To change note format, click on clinical >	Complete Note P	ormat.									
сс	/ History	of Present	llness		≡ note_502782_311031120_3	1 / 1   -	66% +		] ৩			± 🖶	:

3. Complete the fields and then select **Send Fax**.

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