

Fax Documents

Last modified on 05/19/2025 12:29 pm EDT

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 the **Usage** tab in **Provider Settings**.



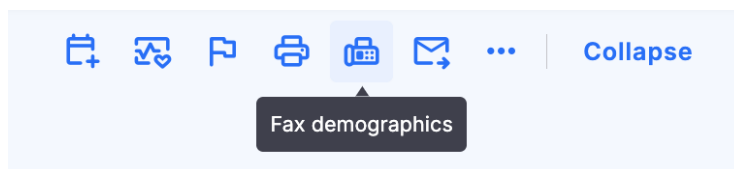
A fax number is required to send and receive faxes.

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](#)

[Locked Clinical Notes](#)

[Signed Consent Forms](#)

[Outbound Referrals](#)

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[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**.

The screenshot shows a clinical note interface for a patient named Jenny (Jen) Harris. The left sidebar has tabs for H&P, SOAP, and ADDITIONAL. The SOAP tab is selected, and the 'Preview Note' button is highlighted. The main content area shows the patient's information and a 'New Patient Visit' section. At the bottom right, there are buttons for 'Apple Health App Data', 'Growth Charts', 'Vitals', 'Print section', and 'Fax section'. A red arrow points to the 'Fax section' button.

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

The screenshot shows the 'Send Fax' form. It has fields for 'To' (Sample Doctor, MD), 'Fax Number' (+1 301-), and 'Message'. There is an 'Enhance Image' checkbox with a description: 'Enabling this function, would raise the contrast and brightness of the fax itself. In some cases, faxes with certain text/color discoloredations would benefit by having this enabled.' A 'Send Fax' button is at the bottom.

Fax a clinical note

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

The screenshot shows the clinical note interface. The left sidebar has tabs for H&P, SOAP, and ADDITIONAL. The 'Preview Note' button is highlighted. The main content area shows the patient's information and a 'Status: Not Locked' section. At the bottom right, there are buttons for 'Amendments', 'Revisions', 'View', 'Fax', 'Sign & lock', 'Edit Sections', and 'Print sections'. A red arrow points to the 'Fax' button.

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

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