FAQs – Help Topics

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- **Faxing**
  - **Receiving faxes**
    - **Locating faxes**

      Faxes are represented under the dark blue gradient header and say "fax" with identifying data, such as the source fax number, if known, and the time/date received. If you're not using Docu-Portal as your fax system, faxes could show up under "files".
    - **Selecting fax pages for filing**

      Click directly below the page thumbnail(s) that you want to include in a single chart filing and then click "Compose with attachments". You may select page thumbnails from more than one Workspace item to combine them into a single filing.
    - **Splitting faxes**

      Click directly below the page thumbnail(s) in an individual fax item on the Workspace relating to one patient and then click "Compose with attachments". Once you file those pages selected to the patient's chart, they will be marked

"Used" on the original Workspace item. You can then go back to the Workspace item and select from the remaining page thumbnail(s) to file those pages from the fax relating to another patient.

- **Sending faxes**
  - **From SOAPware or other applications**
    From SOAPware, another application, or program, go to "Print" and then select "Docu-Portal Printer" from the printer list that appears. Hit print and then look for the item to appear in the Workspace. Click on the header of the printed item, which opens a window with that item, and select the contact to whom it should be faxed in the "Send to" box. After clicking on the Fax "Yes/No" toggle button, add a title and instructions, and then hit "Send".
  - **Including pages from within existing items**
    Click on the page thumbnail(s) that you wish to include with the fax and then click on "Compose with attachments". Follow the same steps to complete the fax, as described directly above.

- **Filing to a Patient Chart**
  See the General Overview "Filing documents into charts" for a complete discussion of how to file faxes, documents, messages, or scanned items into patient charts.
  - **Into SOAPware**
    Click the "Send to EMR" box that appears underneath the patient name. Complete a title and notes for the item, and select any appropriate options from those provided, based on your SOAPware privileges. The SOAPware Connector must first be installed by your administrator for this function to work.
  - **Into a Patient Directory Folder on my computer**
    Click the "Send to Disk" box that appears underneath the patient name.
    Complete a title and notes for the item, then click "Send"
- **Messaging/e-mailing**
  - **Replying**
    To reply to an e-mail or message, open that item by clicking on the item header or clicking on "Open" in the expanded view of that item. If you wish to include the original body of the e-mail or message in your reply, then you should complete the section in the newly opened window called "Reply All". All recipients, including yourself, will receive your reply as well as the original message. There is no option currently to reply to just the sender with the original message included in the thread.

    To reply only to the sender, you should follow the steps for sending an existing item from the Workspace. The original text of the message received will be included in the message, but it will appear to the recipient to be a new thread, versus a reply. You can choose to not send any attachments with the reply.
  - **Forwarding**
    Forwarding an e-mail or message is the same as creating an e-mail or message from an existing item in the Workspace. Click on the message header or click on the "Open" button in the expanded view of the item, and follow the steps to "Send to" in the window that opens.

- **Sending to more than one person**
  Other than "Reply All", described above, there is no option to explicitly send a message, e-mail (or fax) to more than one recipient without recreating that message or e-mail for each recipient after selecting the next contact in the "Send to" box. You can copy and paste from your existing message title and content into the new message title and content to save time. An option to add more than one recipient in the "Send to" box is coming soon.

- **Sending to the Patient Portal**
  Initiating a message or document transfer to the secure Patient Portal for viewing by the associated patient is identical to the initial steps taken to file a document in the patient chart or to send a fax or e-mail (i.e. click on the header of the item you wish to transfer, click on "Open", or select pages and click on "Compose with attachments", etc.). You can send a document to a patient via the Portal at the same time it is filed into the patient chart or at the same time it is sent to a coordinating provider.
  - **Secure messages**
    Click "Compose" and when the window opens, begin typing a few letters of the patient's first or last name until the patient you're seeking appears in the drop down list. Select that patient. If your Portal has been enabled, you will see an open checkbox enabled called "Send to Portal". Check it and complete a title for your message and the contents and click "Send". The message will immediately appear and a notification will be sent to the patient via e-mail that the Portal has received a message. If the patient has not previously logged onto the Portal, he or she will be presented with a temporary password if he or she can validate his or her birth-date within 24 hours.
  - **Attaching chart documents or other documents**
    Just as with attaching chart documents or other documents to a fax or to be filed to the chart, either click on the item header in the Workspace or select the individual pages from within the item and then click "Compose with attachments". Then, follow the above instructions for sending a secure message to the Patient Portal.
  - **Locating login credentials**
    You cannot retrieve the patient's password, but you can reset it if the patient cannot recall his or her password, by checking the box called "reset" password below the associated patient. An e-mail will be sent to the patient prompting him or her to validate the new password with his or her birth-date. If the patient does not have an e-mail, the temporary password will be sent to the Practice Account Administrator, who can then relay it to the patient. The patient also has the option to reset his/her own password if he/she recalls his/her username.

- **Trouble status**
  - **Error messages**
    {coming soon}
  - **Red and green lights**
    This section refers to the status lights appearing in the top right of the Docu-Portal screen.
    - **Docu-Portal status**

A green light indicates that Docu-Portal is available and on-line. A red light indicates that the connection to the Docu-Portal database has been lost, generally due to a network issue. You may still be able to send messages and documents to the Workspace and be able to use functions, such as capturing screen shots and printing from another application into the Workspace, provided you had been logged in before the network issue occurred. However, you will not be able to compose new items or send or file existing items. You should attempt to quit (right click on the "U" in the system tray and select "quit") and then re-launch Docu-Portal from the icon on your desktop and log back in. If this does not resolve the red light, contact SOAPware support.

- **Connector status**

A green light indicates that the Connector which permits imports to SOAPware or patient file directory is running and properly connected to Docu-Portal. A red light indicates one of several conditions that will prevent you from immediately seeing the imports or receiving demographic updates from SOAPware: 1) the Connector has been stopped, 2) the login credentials supplied to the Connector don't match that of the Practice, 3) the Connector cannot "see" the SOAPware database, either because of network issues or because the server has been stopped or logged off, or 4) the configuration of the Connector was not properly input or was modified.

You will not be able to import records to the chart when the red light is present.

Steps you can take to try to correct the red light error condition are (for hosted customers references to desktop and system tray are referring to your remote desktop). For client-server installations of SOAPware, you must be on the computer where SOAPwareXchange is installed:

1. Look in the system tray (usually lower right toolbar on your computer screen) to see if there is a green-tinted U icon with a double green arrow. If not, please find the green-tinted U icon with a double green arrow on your desktop and double click it. You should see the same icon appear in your system tray and a balloon pop up that indicates that the Connector is running and either connected or not connected to Docu-Portal.
2. If in step 1, you do not see an icon on your desktop, go to Admin on the Docu-Portal menu (you must be the account administrator to do this) and select "Set up EMR Connector" and follow the instructions.
3. If in step 1, you succeed in starting the icon in the system tray, but the balloon that indicates a successful connection to Docu-Portal does not appear, then right click on the icon in the system tray and select "Settings". Make sure that the login credentials (username and password) match the login credentials of the Account Administrator for Docu-Portal. If not, please change them to match, and click "Apply Changes".

4. If steps 1-3 don't resolve the red light, please open the Connector and click on the tab that says "Log file" and click on "show debug messages". Click on "email logs" and contact Docu-Portal support for help.