Fax Processing System - Standard Operating Procedure (SOP)

Effective Date: January 28, 2026
Department: Clinical Operations - Men's Health & Primary Care
Purpose: Review and route incoming faxes to patient charts in Healthie

OVERVIEW

The GMH Fax System automatically receives, analyzes, and queues incoming faxes for staff review. Key features:

- **Automatic Reception**: Faxes sent to our number arrive in the dashboard automatically
- **AI Summarization**: Each fax is analyzed by AI to identify patient name, sender, and content type
- **One-Click Upload**: Approved faxes are uploaded directly to the patient's Healthie chart
- **Audit Trail**: All actions are logged with who approved/rejected and when

System Access

Component	Location	Purpose
Fax Dashboard	nowoptimal.com/ops/faxes/	Review and process incoming faxes
View PDF	Click " View PDF" on any fax	See the original fax document
Patient Search	Type patient name when approving	Link fax to correct patient

RECEIVING FAXES

How Faxes Arrive

1. **Incoming fax** is received at our fax number
2. **Fax is forwarded** as email to `fax@nowprimary.care`
3. **System processes** the PDF and extracts content
4. **AI analyzes** the fax to identify:
   - Patient name (if visible)
   - Sending facility/doctor
   - Fax type (lab results, referral, records request, etc.)
   - Urgency level
5. **Fax appears** in the Pending queue on the dashboard

> **NOTE:** Faxes typically appear in the dashboard within 1-2 minutes of receipt. If a fax is not appearing, check the sender sent to the correct number.

PROCESSING FAXES

Step 1: Access the Fax Dashboard

1. Navigate to `nowoptimal.com/ops/faxes/`
2. You will see three tabs:

- **Pending**: New faxes awaiting review
- **Approved**: Faxes uploaded to patient charts
- **Rejected**: Faxes marked as not needed

Step 2: Review Each Fax

1. **Read the AI Summary** - Quick overview of what the fax contains
2. **Check Patient Name** - AI-detected patient name (if found)
3. **Check Sender** - AI-detected sending facility
4. **View the PDF** - Click "   View PDF" to see the actual document

Step 3: Approve or Reject

To APPROVE (Upload to Healthie):

1. **Search for Patient**: Type the patient's name in the search box
   - Minimum 2 characters to start searching
   - Select the correct patient from the dropdown
2. **Click "   Approve & Upload"**
3. The fax PDF is automatically uploaded to the patient's Healthie Documents
4. The fax moves to the "Approved" tab

To REJECT:

1. **Click "   Reject"**
2. The fax moves to the "Rejected" tab
3. Use for: junk faxes, duplicates, wrong number, etc.

Step 4: Un-Rejecting (If Needed)

If you rejected a fax by mistake:

1. Go to the **Rejected** tab
2. Find the fax
3. Click **"   Move to Pending"**
4. The fax returns to the Pending queue

FAX TYPES

The AI categorizes faxes into these types:

Type	Description	Action
Lab Results	Blood work, test results	Upload to patient chart
Referral	Specialist referral letters	Upload to patient chart
Medical Records	Patient history requests/responses	Upload to patient chart
Prescription	Rx-related correspondence	Upload to patient chart
Insurance	Prior auth, coverage info	Upload or forward to billing
Other	Uncategorized	Review manually

TROUBLESHOOTING

Fax Not Appearing

1. **Wait 2-3 minutes** - Processing takes a moment
2. **Refresh the page** - New faxes may not auto-update
3. **Check sender** - Confirm they sent to correct fax number
4. **Contact IT** if fax still missing after 10 minutes

Patient Not Found in Search

1. **Check spelling** - Search is case-insensitive but sensitive to typos
2. **Try partial name** - Search works on first or last name
3. **Verify patient exists** - Check Healthie directly
4. **Only active patients** appear in search results

PDF Won't Open

1. **Try a different browser** - Chrome works best
2. **Disable popup blockers** - PDF opens in new tab
3. **Contact IT** if PDF link is broken

Wrong Patient Selected

If you accidentally uploaded to the wrong patient:

1. **Contact IT immediately** - Document can be moved in Healthie
2. Note the fax date/time and correct patient name
3. Do NOT re-approve the same fax (creates duplicates)

DAILY WORKFLOW

Start of Day

1. Navigate to `nowoptimal.com/ops/faxes/`
2. Check the **Pending** tab count
3. Process each fax systematically:
   - Review AI summary
   - View PDF
   - Match to patient
   - Approve or reject

Throughout Day

- New faxes arrive continuously
- Check back periodically (suggestion: every 1-2 hours)
- High-urgency faxes may also trigger Google Chat alerts

End of Day

- Verify Pending queue is at zero (or only items requiring provider review)
- Note any issues for follow-up

CONTACTS & SUPPORT

Issue	Contact
System Questions	IT/Aaron
Patient Matching Help	Front desk supervisor
PDF Not Loading	IT
Healthie Upload Issues	IT

RELATED DOCUMENTS

- [Lab System SOP](#) - Lab ordering and results review
- [Staff Onboarding SOP](#) - New staff checklist

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