

FAXCOM

USER GUIDE

FAXCOM User Guide

The FAXCOM Web Client is a standalone application used to send, receive and manage faxes. FAXCOM will replace FaxPress Plus and will allow users to:

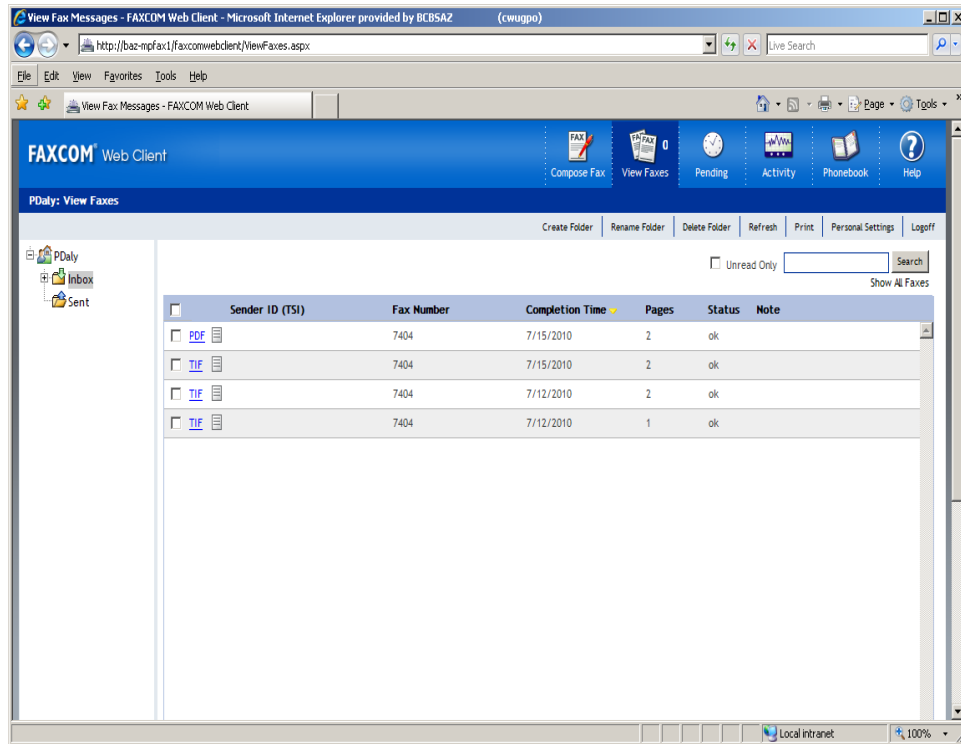
- Send a fax
- Receive new fax
- Email a fax to a specific user or distribution list
- Forward a fax to an email address or distribution list
- Clipboard a fax
- Print a fax to a specific printer
- Route faxes to a person or distribution list
- Forward a fax to other fax users or groups
- Move a copy of a fax to a specified client subfolder
- Save a fax in a FAXCOM Client folder
- Archive and delete faxes

In this section you will learn how to:

Access FAXCOM
Receive a Fax
Compose/Send a Fax
Fax from a Windows Document
Forward a Fax to a Specific User or Department Box
Preview a Fax before Sending
Print to Clipboard and Save a Fax to FileNet
View the Pending Queue
View the Activity Log
Use a Phonebook
Add Entries to a Private Phonebook
Add Entries When Composing a Fax

Accessing FAXCOM:

1. Click the **Internet Explorer** icon. The Planet Blue Homepage will appear.
2. Click **Favorites** and select the **FAXCOM** option from the drop down menu. The **FAXCOM Web Client** will appear:

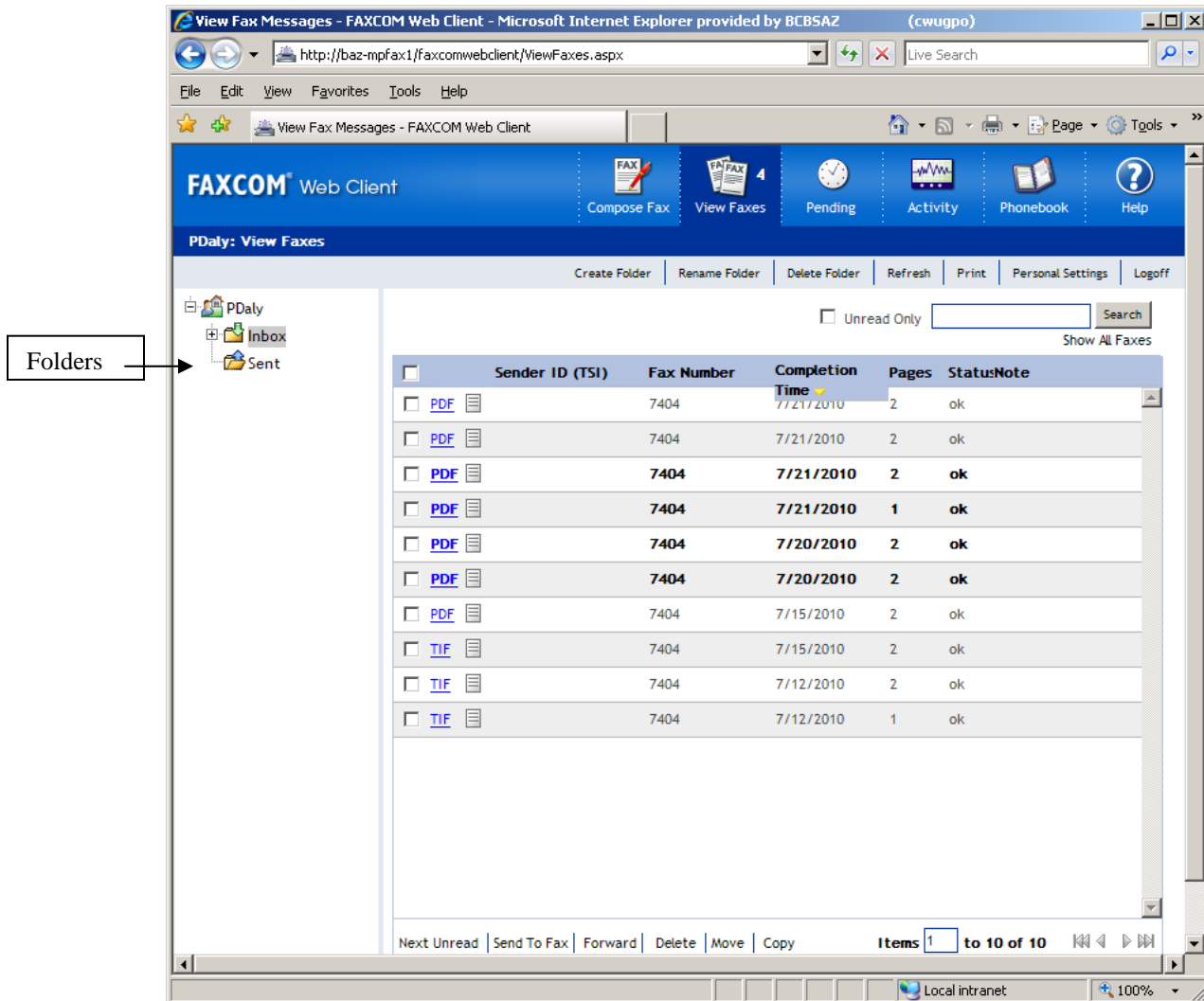


The View Fax Messages window is the default window and displays the following icon options:

- **Compose Fax**
- **View Faxes**
- **Pending**
- **Activity**
- **Phonebook**
- **Create Folder**
- **Rename Folder**
- **Delete Folder**
- **Refresh**
- **Print**
- **Personal Settings**
- **Logoff**

Receiving a Fax:

1. Select the **appropriate folder** from the View Fax Messages window.
2. Click the **PDF** (Portable Document Format- standard for document exchange) **hyperlink** to view the fax.



3. Click the **check box** next to the desired **fax**.
4. Click the appropriate **action** located at the bottom of the window:
 - **Next Unread** - moves to next unread fax
 - **Send To Fax** - sends fax to a new recipient
 - **Forward** - forwards fax to a specific user or department box
 - **Delete** - deletes a fax
 - **Move** - moves a fax to a specific folder
 - **Copy** - copies a fax to another folder, multiple folders or an archived folder

Composing/Sending a Fax:

1. Click the **Compose Fax** icon. The Compose Fax Message window will appear.
2. Complete the following information in the **Send To** block:
 - **Name**
 - **Company**
 - **Fax Number**
 - **Phone Number** (not required)
 - **Account Number** (not required)

The screenshot shows the 'Compose Fax Message' window in a Microsoft Internet Explorer browser. The window title is 'Compose Fax Message - FAXCOM Web Client - Microsoft Internet Explorer provided by BCBSAZ (cwugpo)'. The address bar shows 'http://baz-mpfax1/faxcomwebclient/Compose.aspx'. The browser menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar shows icons for Send, Save, Send & Save, and Preview. The main content area is divided into two columns. The left column is titled 'Send To' and contains input fields for Name, Company, Fax Number, Phone Number, and Account. To the right of these fields are buttons: 'Add to Recipient List', 'Private Phonebook', 'Public Phonebook', and 'Add to Phonebook'. Below these fields is a section for 'Total recipients 0' with links for 'Expand All', 'Collapse All', 'Remove', and 'Remove All'. The right column is titled 'Fax Details' and contains a 'Cover Page' dropdown menu (set to 'default cover page'), a 'Subject' input field, and a 'Memo' text area. Below these is an 'Attachments' section with a 'Name' input field, a 'Browse...' button, and a 'List' input field. At the bottom is an 'Options' section with a 'Schedule' subsection containing radio buttons for 'ASAP' (selected), 'Delay', and 'Offpeak'. There is also a 'Priority' dropdown menu (set to 'Normal') and a 'Resolution' subsection with radio buttons for 'Standard' and 'Detail' (selected). The status bar at the bottom shows 'Local intranet' and '100%' zoom.

3. Complete the **Fax Details** block including:
 - **Cover Page** - select from drop down menu
 - **Subject** - required when attaching a document
 - **Memo** - used when sending a brief fax memo or to add additional text
 - **Attachments** - select Windows document from Browse button to attach a Windows document.

- **Options**
 - **Schedule** - allows fax to be sent ASAP or held/delayed and then sent on a specific date and time or during off peak hours
 - **Priority** - allows user to select Low, Normal or High priority
4. Click the **Send**, **Save** or **Send & Save** icon. The fax has now been sent.

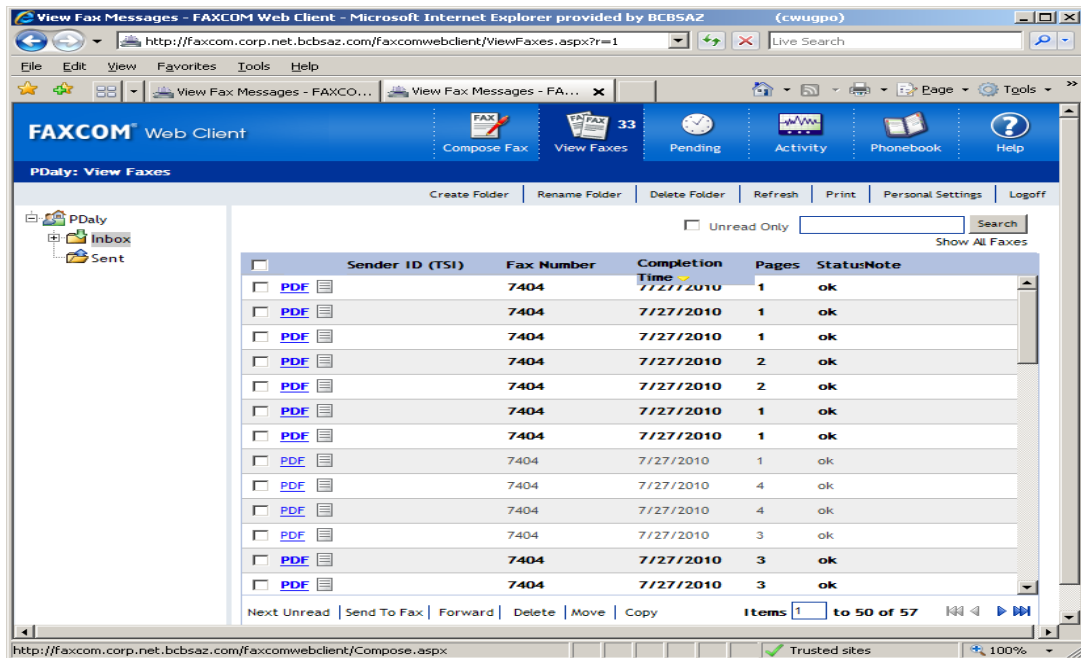
Faxing from a Windows Document:

1. Access the document in the windows application (example Word or Excel).
2. Click **File, Print**.
3. Select the **Biscom Fax Printer** option from the drop down menu.
4. Click **OK**. The Compose Fax Message window will appear displaying the document to be attached in the List box in the Attachments block:

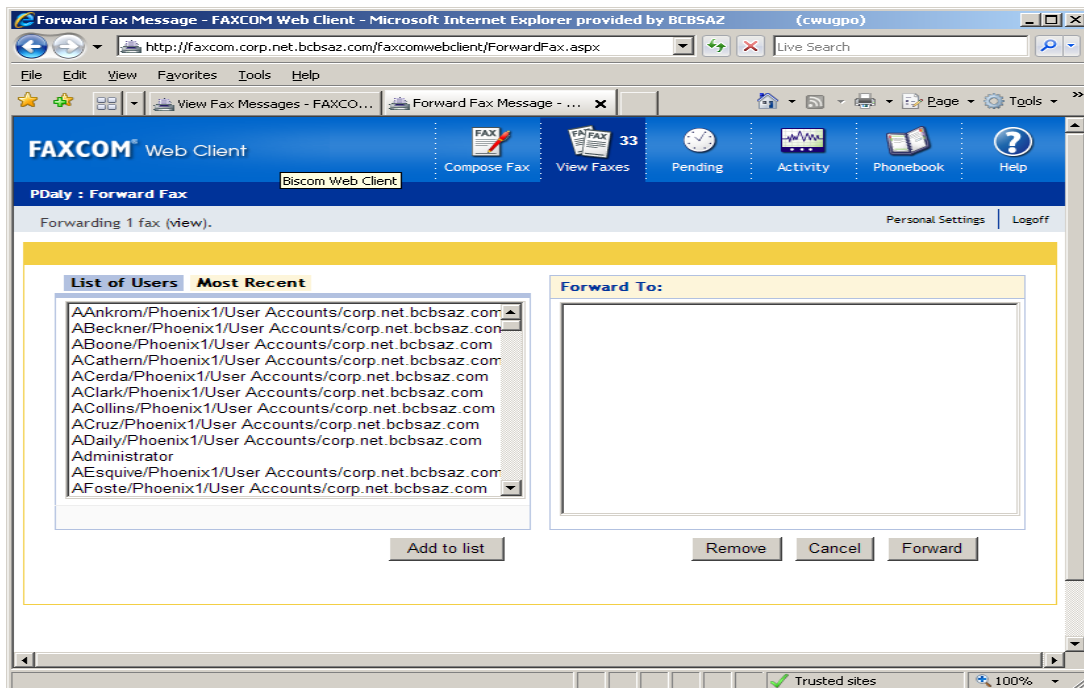
5. Complete the **Send To** and **Fax Details** blocks.
6. Click **Send**, **Save** or **Send & Save**. The fax, along with the attachment, has now been sent.

Forwarding a Fax to a Specific User or Department Box:

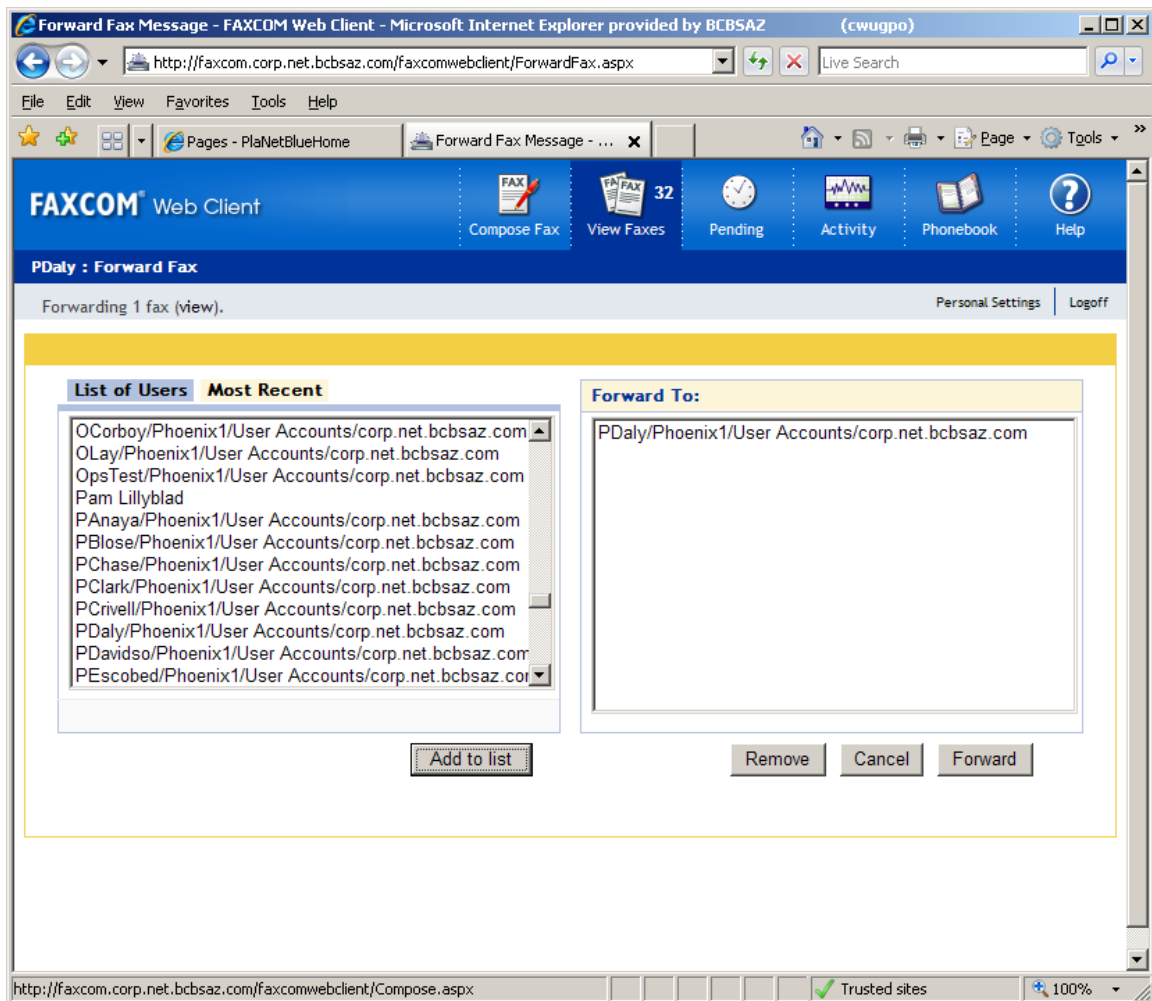
1. Select the **check box** next to the fax or faxes to be forwarded.



2. Click the **Forward** action option located at the bottom of the window. The Forward Fax Message window will appear with the list of FAXCOM users and department boxes:




3. **Select** the user/users that the fax is being forwarded to.
4. **Click the Add to list** button. The user/users will appear in the **Forward To** box:

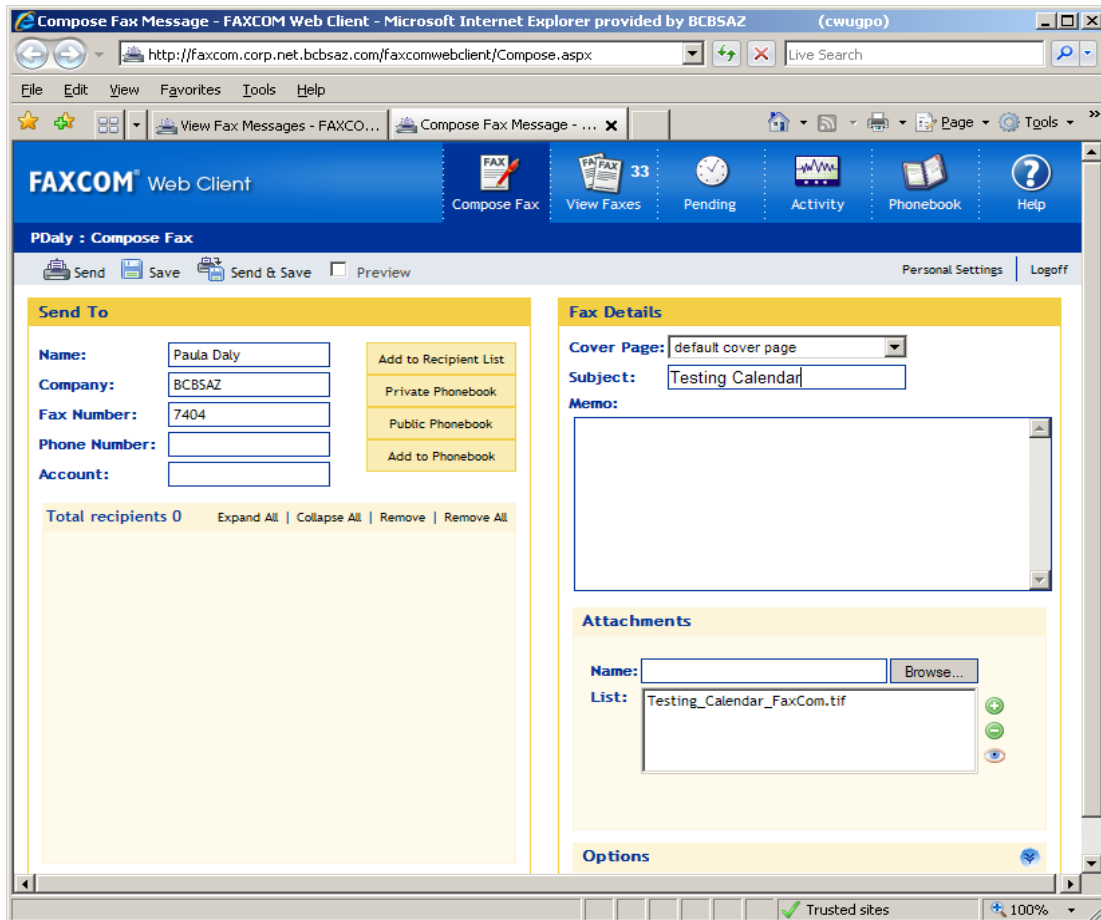


5. **Click the Forward** button. The fax will be forwarded. The View Fax Messages window will reappear.

Previewing a Fax before Sending:

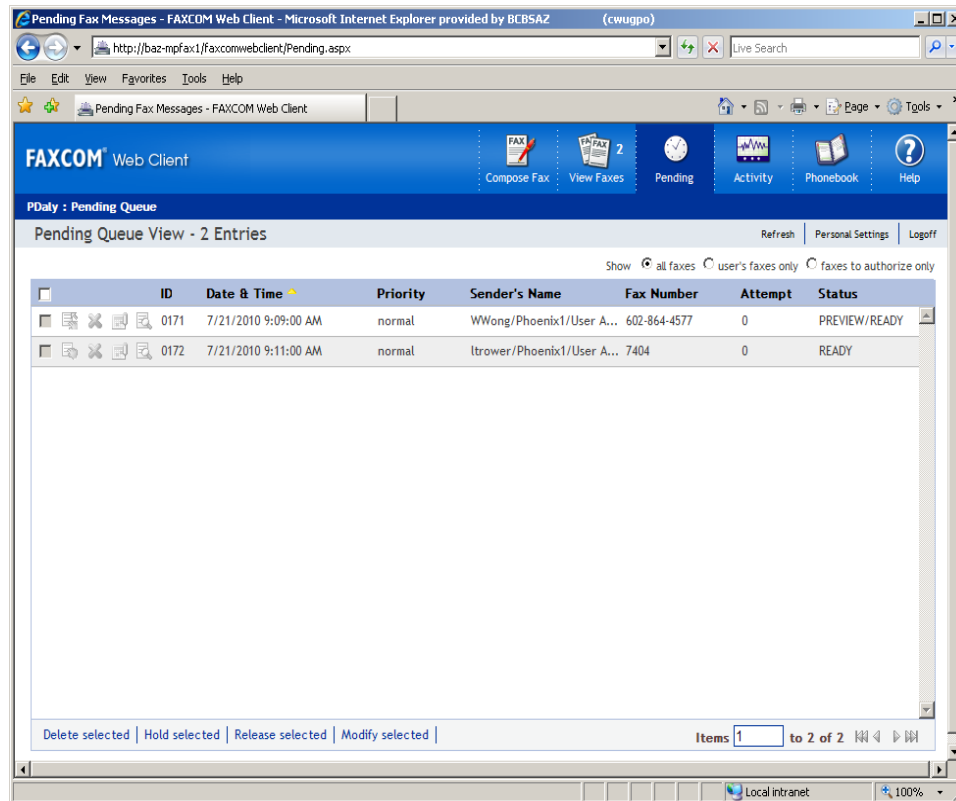
There are two ways to preview a fax. Directly from the Compose Fax Message window or from the Pending Fax Messages window when the fax is on hold or delayed.

1. **Select the fax/document** in the List box.
2. **Click the  icon** in the Fax Details box. The fax will appear.
3. **Close the fax** to return to the Compose Fax Message window.
4. **Click the Send, Save or Send & Save icon.** The fax has now been sent.



When a fax has been put on hold or delayed in the Options block, the fax can only be viewed in the Pending Fax Messages window.

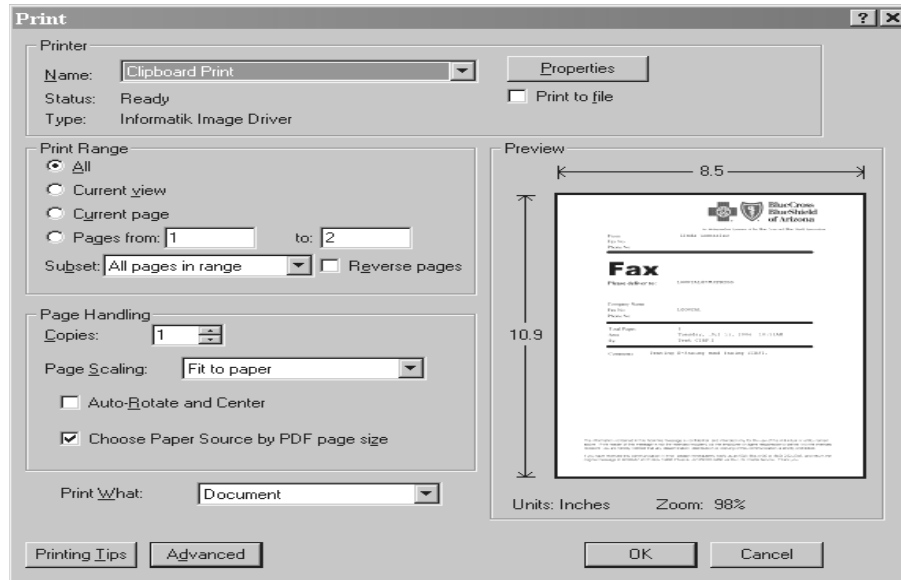
1. **Click the Preview** check box located at the top of the Compose Fax Message window. The Pending Fax Messages window will appear:



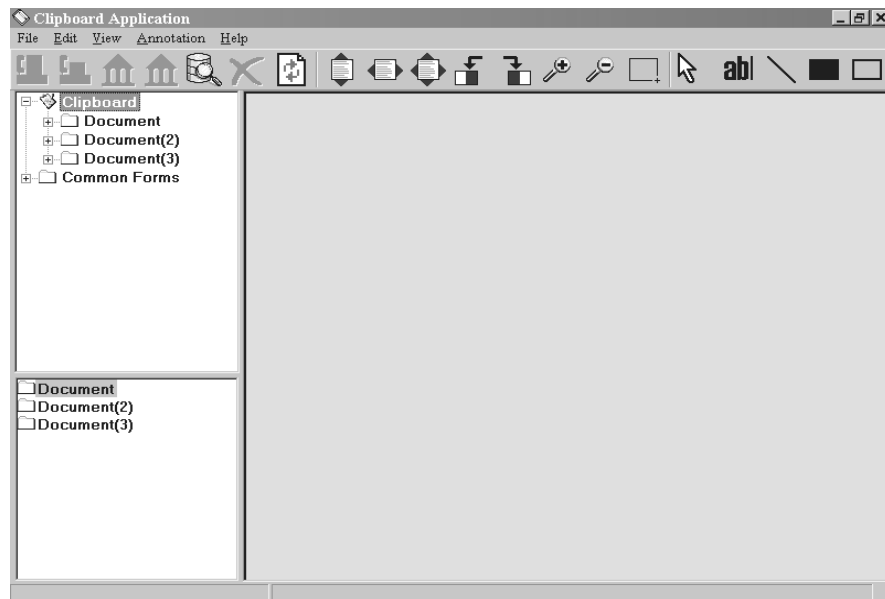
2. **Click the Preview** icon on the selected fax. The fax will appear.
3. **Exit** the fax to return to the Pending Fax Messages window.

Printing to Clipboard and Saving a Fax to FileNet:

1. Click the **PDF hyperlink** to be printed to Clipboard. The selected fax will appear.
2. Click **File, Print**. The Print dialog box will appear:

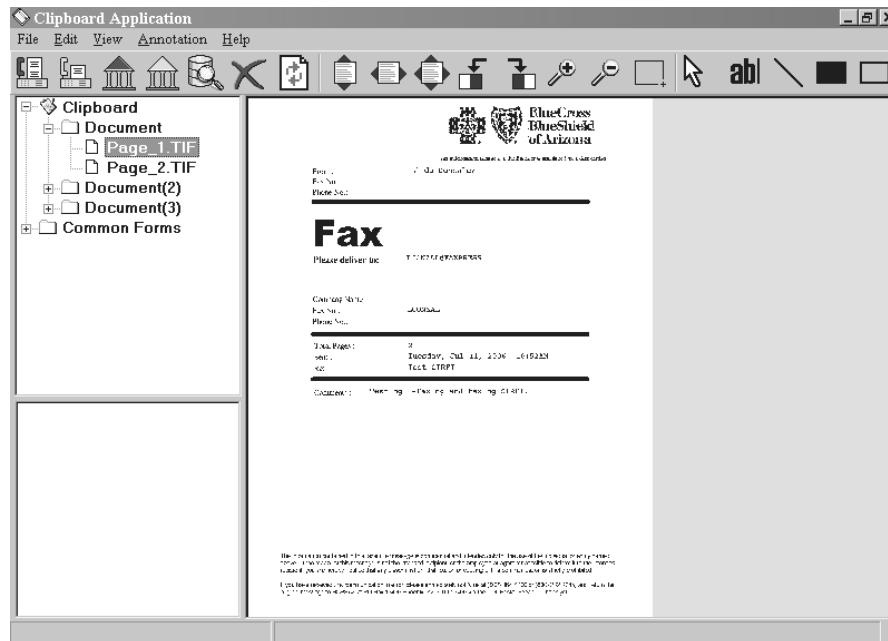


3. Select **ClipBoard Print** in the **Printer Name** field.
4. Click **OK**. The ClipBoard Application window will appear:




5. Click the appropriate **Document Folder** to view the fax. All the fax pages will display in the lower left side of the window.

6. **Click the first page** to be sent to FileNet. The Clipboard Application window will reappear with the fax information displaying on the right side of the window:

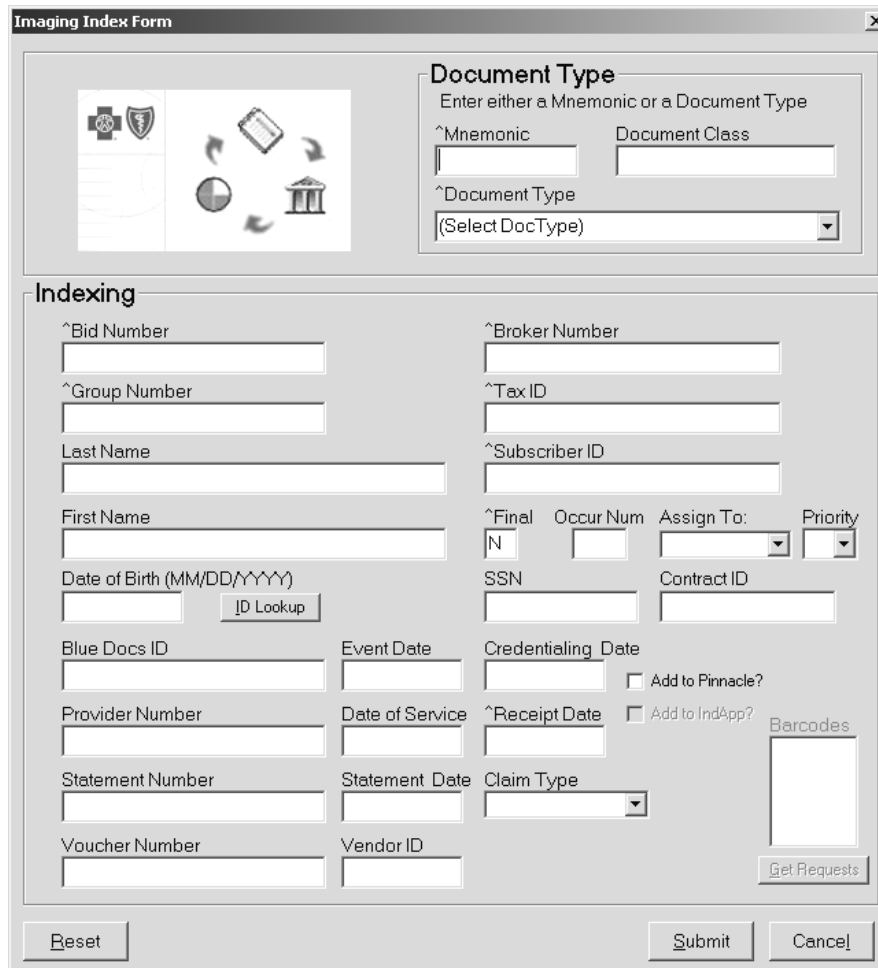


NOTE: Highlight all pages in the document to ensure proper filming.

7. **Click the Save to FileNet, Delete Document icon**  to save the document to FileNet (Image Retriever). The Enter your User ID and Password dialog box will appear:

The dialog box is titled 'Enter your User ID and Password'. It has a gray background and a title bar. On the left side, there is a small icon of a key and a document. The main area contains two text input fields: 'User ID:' and 'Password:'. To the right of the 'User ID:' field is an 'OK' button. To the right of the 'Password:' field is a 'Cancel' button.

8. **Enter the User ID and Password** currently used for Image Retriever. The Imaging Index Form will appear:



The screenshot shows the 'Imaging Index Form' window. It has a title bar with a close button. The form is divided into several sections. At the top left, there is a logo with a cross and a shield, and a circular diagram with icons representing a document, a magnifying glass, and a building. To the right of this is the 'Document Type' section, which includes a label 'Enter either a Mnemonic or a Document Type', a text field for '^Mnemonic', a text field for 'Document Class', a text field for '^Document Type', and a dropdown menu for '(Select DocType)'. Below this is the 'Indexing' section, which contains numerous text fields and dropdown menus for various identifiers and dates. At the bottom right of the indexing section is a 'Barcodes' area with a 'Get Requests' button. At the very bottom of the form are three buttons: 'Reset', 'Submit', and 'Cancel'.

Imaging Index Form

Document Type
Enter either a Mnemonic or a Document Type

^Mnemonic Document Class

^Document Type
(Select DocType)

Indexing

^Bid Number
^Group Number
Last Name
First Name
Date of Birth (MM/DD/YYYY)
Blue Docs ID
Provider Number
Statement Number
Voucher Number

Event Date
Date of Service
Statement Date
Vendor ID

^Broker Number
^Tax ID
^Subscriber ID
^Final
Occur Num
Assign To:
Priority
SSN
Contract ID
Credentialing Date
^Receipt Date
Claim Type

JD Lookup

Add to Pinnacle?
Add to IndApp?

Barcodes

Get Requests

Reset Submit Cancel

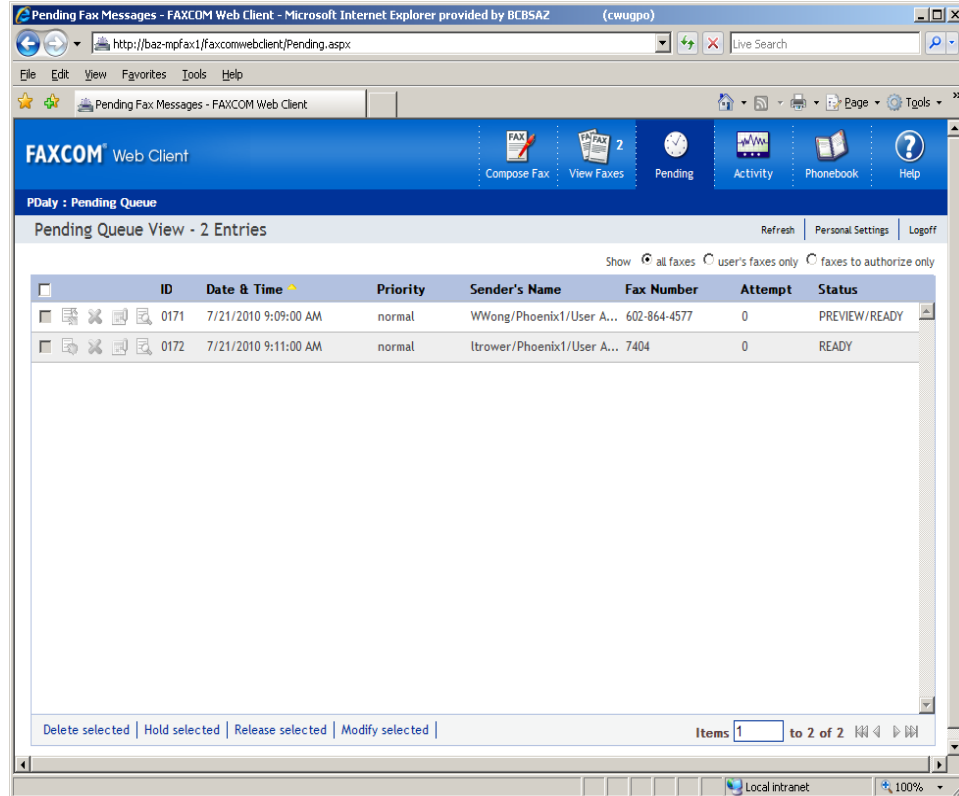
9. **Click the down arrow** in the **Document Type** field to select the appropriate document type.
10. **Enter the following required fields:**
- **Last Name**
 - **First Name**
 - **Subscriber ID**
 - **Date of Birth**
 - **Claim Type** (if applicable)
11. **Click Submit.** The file will successfully be sent to FileNet.

NOTE: A copy is saved in the Cache files and a copy is saved in Image Retriever to be processed as a new claim to SOURCE CORE or as Correspondence to be batched depending on the selection.

Viewing the Pending Queue:

The Pending Queue lists all faxes queued for transmission and enables a user to see where the fax is located in the queue. A user can select and make any final changes to the transmission status and destination number of the fax.

1. Click the **Pending Queue** icon to display faxes in the Pending Queue. The Pending Fax Messages window will appear:



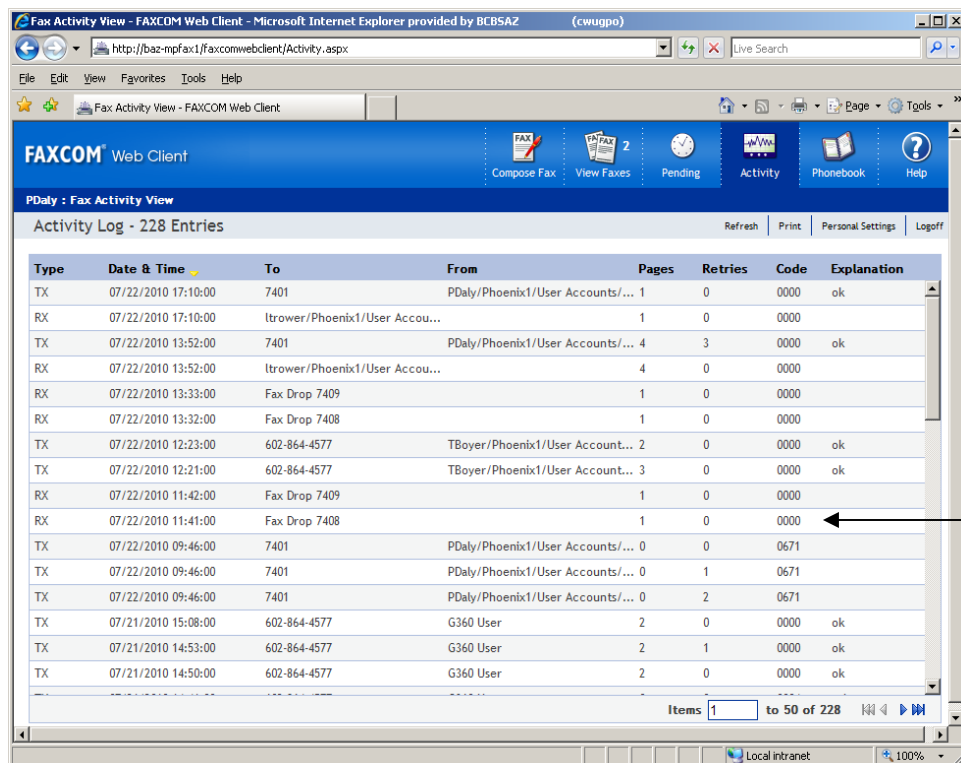
2. View the following:
 - **ID** - four digit number used to track the fax
 - **Date & Time** - when the fax will be transmitted
 - **Priority** - specified for the transmission
 - **Sender's Name** - name of the originator of the fax
 - **Fax Number** - destination fax number
 - **Attempt** - number of transmission attempts
 - **Status** - condition of the fax server
3. Click the **check box** to select the fax.

4. **Select** the appropriate **action** at the bottom of the window:
 - Delete selected - deletes the fax
 - Hold selected - places the fax on hold
 - Release selected - releases the fax to be sent
 - Modify selected - allows modifications to the fax

Viewing the Activity Log:

The Activity Log lists all attempted fax transmissions, both successful and unsuccessful and all received faxes for the entire fax service.

1. **Click the Activity icon.** The Fax Activity View window will appear:



The screenshot shows the FAXCOM Web Client interface in Microsoft Internet Explorer. The 'Activity' icon is selected in the top navigation bar. The 'Activity Log - 228 Entries' table is displayed with the following columns: Type, Date & Time, To, From, Pages, Retries, Code, and Explanation. A callout box with an arrow points to a row where the 'Code' is '0000'.

Type	Date & Time	To	From	Pages	Retries	Code	Explanation
TX	07/22/2010 17:10:00	7401	PDaly/Phoenix1/User Accounts/...	1	0	0000	ok
RX	07/22/2010 17:10:00	ltrower/Phoenix1/User Accou...		1	0	0000	
TX	07/22/2010 13:52:00	7401	PDaly/Phoenix1/User Accounts/...	4	3	0000	ok
RX	07/22/2010 13:52:00	ltrower/Phoenix1/User Accou...		4	0	0000	
RX	07/22/2010 13:33:00	Fax Drop 7409		1	0	0000	
RX	07/22/2010 13:32:00	Fax Drop 7408		1	0	0000	
TX	07/22/2010 12:23:00	602-864-4577	TBoyer/Phoenix1/User Account...	2	0	0000	ok
TX	07/22/2010 12:21:00	602-864-4577	TBoyer/Phoenix1/User Account...	3	0	0000	ok
RX	07/22/2010 11:42:00	Fax Drop 7409		1	0	0000	
RX	07/22/2010 11:41:00	Fax Drop 7408		1	0	0000	
TX	07/22/2010 09:46:00	7401	PDaly/Phoenix1/User Accounts/...	0	0	0671	
TX	07/22/2010 09:46:00	7401	PDaly/Phoenix1/User Accounts/...	0	1	0671	
TX	07/22/2010 09:46:00	7401	PDaly/Phoenix1/User Accounts/...	0	2	0671	
TX	07/21/2010 15:08:00	602-864-4577	G360 User	2	0	0000	ok
TX	07/21/2010 14:53:00	602-864-4577	G360 User	2	1	0000	ok
TX	07/21/2010 14:50:00	602-864-4577	G360 User	2	0	0000	ok

Transmission code 0000 indicates a successful transmission.

2. **View** the following:
 - **Type** - unique identifying number used to track the fax
 - **Date & Time** - the date and time the fax transmittal was completed
 - **To** - destination fax number
 - **From** - name of the originator of the fax
 - **Pages** - number of pages of the fax
 - **Retries** - number of transmission attempts
 - **Code** - status code for successful and unsuccessful transmissions
 - **Explanation** - up to a four letter abbreviation for the status code

Using a Phonebook:

All users will have access to view, add and submit faxes from their Private Phonebook. Only individuals designated as Public Phonebook managers will have the authorization to manage and view the Public Phonebook.

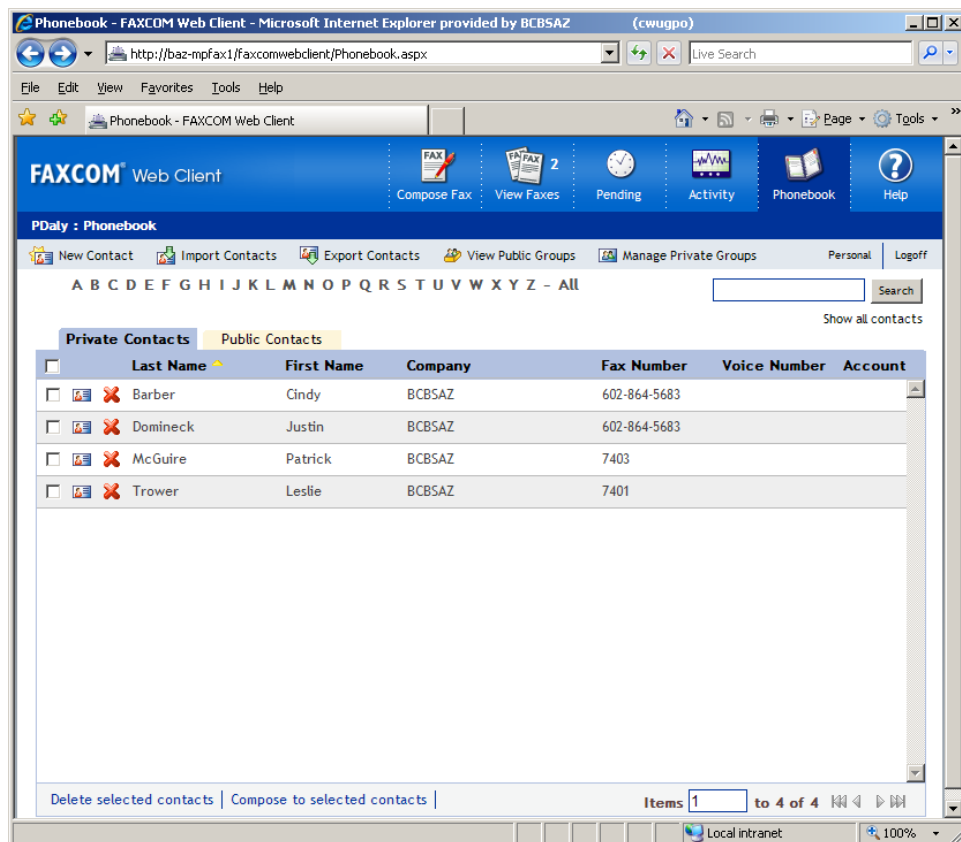
Adding Entries to a Private Phonebook:

There are two ways to add entries to a Private Phonebook:

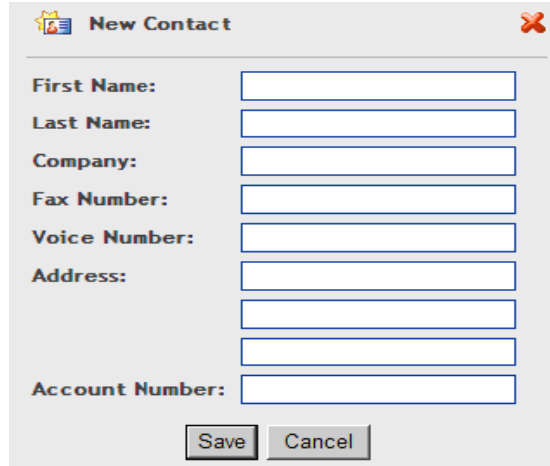
- Open the Private phonebook directly by clicking the phonebook icon
- Automatically adding a fax recipient to the Private phonebook when composing a fax from the Send Fax dialog box

Adding Entries Directly to the Phonebook:

1. **Click the Phonebook icon.**
2. **Click the Private Contacts tab.** A list of private contacts will display:



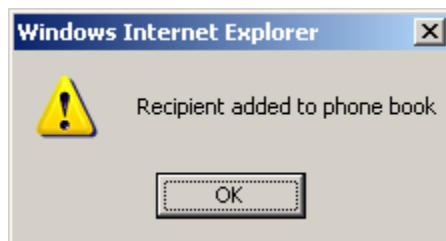
3. **Click the New Contact icon.** The New Contact dialog box will appear:

A dialog box titled "New Contact" with a close button (X) in the top right corner. It contains several input fields: "First Name:", "Last Name:", "Company:", "Fax Number:", "Voice Number:", "Address:" (with two stacked input boxes), and "Account Number:". At the bottom are "Save" and "Cancel" buttons.

4. **Complete the following required fields:**
 - **First Name**
 - **Last Name**
 - **Company**
 - **Fax Number**
5. **Click Save.** The Contact will now appear in the Private Contacts list.

Adding Entries When Composing a Fax:

1. **Click the Compose Fax icon.**
2. **Complete** the required fields in the **Send To** block.
3. **Click the Add to Phonebook button.** The Recipient added to phone book message will appear:



4. **Click OK.** The Contact will now appear in the Private Contacts list.