GUIDE TO E-FAXING FROM HOME

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Purpose of this Guide

This guide is intended for physicians and MOAs that are **unable to use the fax processes they use within their clinic** (for sending documents). It provides an overview of workflows and tools when faxing documents from home or outside the clinic.

If you are unsure about the e-fax capabilities of your EMR, please contact your EMR vendor for the most up-to-date information on their solution.

Key Steps

- Choosing an e-fax solution
- Setting up the e-fax solution
- Using an App which allows you to write to a PDF
- Sending an e-fax

Doctors Technology Office (DTO) is here to support you, please reach out with your questions to:

📞 604 638-5841 ✉ DTOinfo@doctorsofbc.ca

🌐 www.doctorsofbc.ca/doctors-technology-office

Peer Mentor Support – If you would like support from a peer mentor, please reach out to DTO:

📞 604 638-5841 ✉ DTOinfo@doctorsofbc.ca

EMRs: e-Faxing and Adding Signatures to Documents

If you are unsure about the e-fax capabilities of your EMR, please contact your EMR vendor for the most up-to-date information about their solution.

Some EMR vendors have the ability to **add signatures** to documents
Some EMR vendors have the ability to **e-fax** from the EMR without requiring the workflows outlined below

This document is focused on workflows where the user is unable to send a fax from their EMR.

Workflow: Decision Tree

Depending on your situation, there are a number of workflows you might need a solution for. Once you have figured out which workflow applies to your situation, see below for a step-by-step approach. If your workflow is not covered in this guide, please reach out to DTOinfo@doctorsofbc.ca for support.
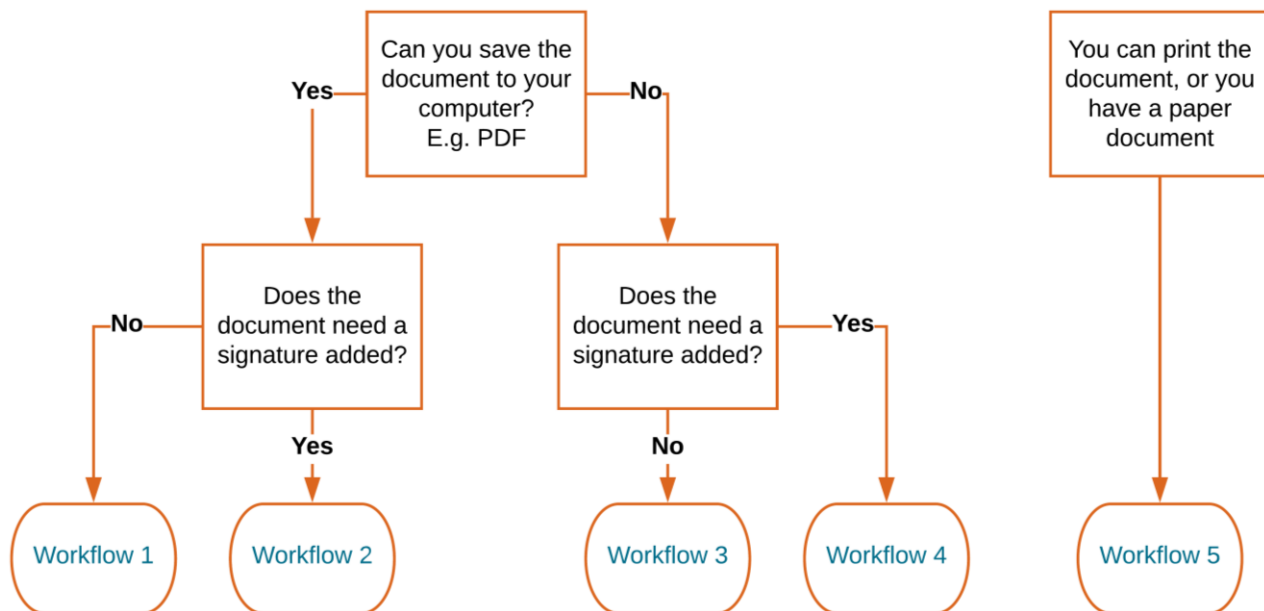
Tip: Click on the Workflow # to navigate to that section in the guide.

Workflow: A Step-by-Step Guide

Workflow 1: Use when you are *able to save a PDF document from your EMR to your computer* AND a *signature is not required.*

Mac and Windows users Tools needed	
e-fax solution	
Login to your e-fax solution in your web browser 1. Click Send Fax 2. Enter the fax number 3. Enter the pertinent information 4. If your cover sheet does not contain a disclaimer, you can add the one in this guide 　▪ See the section **Fax Disclaimer: Example** 5. Attach the documents you wish to send 6. Click Send Fax	Notes ▪ Given the insecure nature of email, it is recommended to login to your fax solution in your web browser to send a fax 　▪ E.g. Some e-fax solutions allow you to send a fax as an email with attached documents ▪ It is recommended that you delete the documents from your computer once you have received a successful fax confirmation

Workflow 2: Use when you are *able to save a PDF document from your EMR to your computer* AND a *signature is required.*

Mac and Windows users	
Mac and Windows users Tools needed ▪ e-fax solution ▪ PDF writer	
Sign your PDF document 1. Open the document in your PDF writer 2. Add your signature ▪ See the section **Appendix – How to Create Signatures & Sign Documents** 3. Save your document	

Login to your e-fax solution in your web browser
 	
1. Click Send Fax
2. Enter the fax number
3. Enter the pertinent information
4. If your cover sheet does not contain a disclaimer, you can add the one in this guide
   ▪ See the section **Fax Disclaimer: Example**
5. Attach all the documents you wish to send
6. Click Send Fax
	Notes
	
	▪ Given the insecure nature of email, it is recommended to login to your fax solution in your web browser to send a fax
	   ▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax
	▪ It is recommended to delete the documents from your computer once you have received a successful fax confirmation

Workflow 3: Use when you **cannot** save the document to your computer AND a signature is **not required**.

Mac users only	Notes
If using macOS Mojave (or later) and iOS 12 (or later) on iPhone/iPad, you can scan a document using your iPhone/iPad and save this directly to your Mac	▪ More information can be found at https://support.apple.com/en-us/HT209037
This involves using the **Continuity Camera** in Finder	
▪ Both devices need to be signed into iCloud	
▪ You can take a picture with your iPhone/iPad, and then save the picture directly on your Mac	
▪ Follow **Workflow 1**	

Mac and Windows users	
Tools needed	
▪ e-fax solution	
▪ Scanning App	
Display the document on your screen	Notes
1. Open the document on the screen 2. Position the document, and try to display a single page on the screen	▪ If necessary, scan the top of the page and bottom of the page as different documents
Scan the document – using a Scanning App	Notes
3. Open a Scanning App on your mobile device 4. Scan the document 5. Save the document 6. Repeat if the document has more than one page	▪ If the image is not clear, try turning off the flash ▪ Some Scanning Apps have a feature which helps with glossy documents/screen capture ▪ (E.g. TurboScan takes 3 images and consolidates them into 1 document)
On your mobile device use a web browser to login to your e-fax solution	Notes

7. Click Send Fax
8. Enter the fax number
9. Enter the pertinent information
10. If your cover sheet does not contain a disclaimer, you can add the one using this guide
   ▪ See the section **Fax Disclaimer: Example**
11. Attach all the documents you wish to send
12. Click Send Fax
	▪ You can open the fax solution via a web browser or via the fax solution app on your mobile device
	▪ Given the insecure nature of email, it is **recommended to login to your fax solution using a web** browser to send a fax
	   ▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax
	▪ It is recommended that you delete the documents from your mobile device once you have received a successful fax confirmation

Workflow 4: Use when you **cannot** save the document to your computer AND a signature is required.

Mac users only	Notes
If using macOS Mojave (or later) and iOS 12 (or later) on iPhone/iPad, you can scan a document using your iPhone/iPad and save this directly to your Mac	▪ More information can be found at https://support.apple.com/en-us/HT209037
This involves using the **Continuity Camera** in Finder	
▪ Both devices need to be signed into iCloud	
▪ You can take a picture with your iPhone/iPad of a document on the screen, and then save the picture directly on your Mac	
▪ Follow **Workflow 2**	

Mac and Windows users - Please see the next page

Mac and Windows users Tools needed ▪ e-fax solution ▪ Scanning App ▪ PDF writer App	
Display the document on your screen 1. Open the document on the screen 2. Position a single page document on the screen	Notes ▪ If necessary, scan the top of the page and bottom of the page as different documents
Scan the document – using a scanning App 3. Open the scanning App on your mobile device 4. Scan the document 5. Save the document 6. Repeat if the document has more than one page	Notes ▪ If the image is not clear, try turning off the flash ▪ Some Scanning Apps have a feature which helps with glossy documents/screen capture ▪ E.g. TurboScan takes 3 images and consolidates this into 1 document
Sign your PDF document 7. Open the document in your PDF writer 8. Add your signature ▪ See the section **Appendix – How to Create Signatures & Sign Documents** 9. Save your document	Notes ▪ If using TurboScan, open the document directly in Acrobat Reader ▪ If using the eFax App (efax.com)you can open the document directly in the eFax App, sign the document and fax the document

Login to your e-fax solution in your web browser
 	
10. Click Send Fax
11. Enter the fax number
12. Enter the pertinent information
13. If your cover sheet does not contain a disclaimer, you can add the one in this guide
   ▪ See the section **Fax Disclaimer: Example**
14. Attach all the documents you wish to send
15. Click Send Fax
	Notes
	
	▪ You can open the fax solution in your web browser or via e-faxing app on your mobile device
	▪ Some fax solutions have a mobile app
	▪ Given the insecure nature of email, it is recommended to login to your fax solution in your web browser to send a fax
	   ▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax
	▪ It is recommended to delete documents from your mobile device once you have received a successful fax confirmation

Workflow 5: Use when you can print a document (or you have a paper document) AND the document can be physically signed as required.

Mac users only	Notes
If using macOS Mojave (or later) and iOS 12 (or later) on iPhone/iPad, you can scan a document using your iPhone/iPad and save this directly to your Mac	▪ More information can be found at https://support.apple.com/en-us/HT209037
This involves using the **Continuity Camera** in Finder • Both devices need to be signed into iCloud • You can take a picture with your iPhone/iPad, and then save the picture directly on your Mac • Follow **Workflow 1**	

Mac and Windows users Tools needed	
▪ e-fax solution ▪ Scanning App	
Scan the document – using a home printer/scanner 1. If you have a printer with a scanner, you can scan this document to your computer 2. Follow **Workflow 1**	Notes ▪ Many printers have scanning capability
Scan the document – using a scanning App 3. Open the scanning App on your mobile device 4. Scan the document 5. Save the document	Notes ▪ If the image is not clear, you can try turning off the flash ▪ Some Scanning Apps have a feature which helps with glossy documents/screen capture ▪ E.g. TurboScan takes 3 images and consolidates this into 1 document

Login to your e-fax solution in your web browser (or mobile app)
6. Click Send Fax
7. Enter the fax number
8. Enter the pertinent information
9. If your cover sheet does not contain a disclaimer, you can add the one in this guide
  ▪ See the section **Fax Disclaimer: Example**
10. Attach all the documents you wish to send
11. Click Send Fax
	Notes
	▪ You can open the fax solution in your web browser on your mobile device
	▪ Some fax solutions have a mobile app
	▪ Given the insecure nature of email, it is recommended to use your web browser to send a fax
	  ▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax
	▪ It is recommended to delete the documents from your mobile device once you have received a successful fax confirmation

Tools

There are several tools that can be used as part of your e-faxing workflow. Below is a non-comprehensive list. Reach out to the vendor directly to learn more or contact DTOinfo@doctorsofbc.ca.

Electronic Faxing Apps

These apps enable you to fax documents from your mobile device or from your computer.

Tool	Key Information
SRFax https://www.srfax.com/ For information about how e-fax works: https://www.srfax.com/support/how-to-fax/	▪ Faxes can be sent via a web browser (login required to the e-fax solution) ▪ Option available to send fax via email (**Not recommended** as emails travel over the open internet from your computer to the recipient's mail server) ▪ Faxes can be sent using a **printer driver** ▪ Toll free number or port your own fax number ▪ Send multiple pages at the same time ▪ Various healthcare plans available ▪ Save a fax disclaimer which is automatically added to the cover page ▪ Data is encrypted and stored on **Canadian** data centres ▪ Approved and in use by **Vancouver Coastal Health Authority**
Telus Business Connect https://www.telus.com/en/bc/business/small/phone/cloud-phone?linktype=biz-size-modal	▪ Telus Business Connect Enhanced or Complete (**includes e-faxing**) ▪ Faxes can be sent via a web browser (login required to the e-fax solution) ▪ Faxes can be sent using their desktop application (Windows and Mac) ▪ Faxes can be sent using a printer driver ▪ Send multiple pages at the same time ▪ Save a cover page which includes a fax disclaimer ▪ Additional features include: phone line, text messaging, audio conferencing, and video conferencing
eFax https://www.efax.com/ For information about how eFax works: https://www.efax.com/how-it-works	▪ Faxes can be sent via a web browser (login required to the e-fax solution) ▪ Option available to send fax via email (**Not recommended** as emails travel over the open internet from your computer to the recipient's mail server) ▪ Toll-free number or port your own fax number ▪ Send multiple pages at the same time ▪ Mobile App with ability to sign documents ▪ Data is stored on US data centres (***NOTE:*** *This is allowable for private practice physicians under PIPA legislation, but it is always preferable to use companies that store their data in Canada, whenever possible*).
EMR Vendors	▪ Please contact your vendor for the most up-to-date information on e-faxing
Other e-fax providers	▪ There are other options available

Scanning Apps

These apps enable you to scan a paper document (or part of a screen) and convert it into a PDF.

Tool		Key Information
TurboScan	Mobile App stores Piksoft Inc	▪ Free App (there is also a paid version available) ▪ Scans the document ▪ Can also scan a document displayed on a computer screen ▪ Approved and in use by **Vancouver Coastal Health Authority**
Other Apps		▪ There are other options available

PDF Writer Apps

These apps enable you to add a signature to your document and annotate your document.

Tool		Key Information
Adobe Acrobat Reader	Mobile App stores Windows and Mac https://get.adobe.com/reader/	▪ Free application ▪ Sign a PDF document from your Windows or Mac computer ▪ Sign a PDF document from your mobile device ▪ Create original signatures each time you sign a document ▪ Save a signature as an electronic 'wet' signature ▪ Annotate documents as well ▪ Do not need to register an account with Adobe
Preview	Mac users only	▪ Application is already available on Mac computers ▪ Sign a PDF document from your Mac ▪ Create original signatures each time you sign a document ▪ Save a signature as an electronic 'wet' signature ▪ Annotate documents as well
Other Apps		▪ There are other options available

Tips

Saving documents – When saving documents to your local computer, if possible. It is recommended to save the document with a recognizable filename. This makes it easier to find the document(s) that you are going to fax.

Fax number directory – Very useful to have a spreadsheet with the names and fax numbers needed. This spreadsheet would need to be on the computer the physician/MOA is using to send the faxes.

Prescription Signatures

COVID 19 Response - Temporary
Options for Wet Signature Req't for Community Prescribers[1] Working from Home

Issue: Community prescribers working from home need a means to prescribe a) regular drugs and b) controlled substances without access to office fax machines.

Req't: Community pharmacists need to be able to authenticate prescriptions.

Must include in Rx:

- Prescriber current phone number and license number (a & b)
- Controlled Rx folio number (b only)
- Always mail the duplicate prescription to pharmacy (b only)

Option	Regular drugs	Controlled substances
Phone	No changes to existing practice	1. Call in verbal order 2. Mail in original duplicate
Fax	Be sure to include CPSBC license number and **current phone number** where prescriber can be reached	
		1. Add Rx folio number from Duplicate prescription to EMR prescription (don't need to fax duplicate) 2. Mail original duplicate to pharmacy
e-Fax (EMR with e-fax capability users)	1. Generate prescription (e.g. using your EMR) 2. Be sure to include CPSBC license number and current phone number, where the prescriber can be reached 3. Add electronic (stored) or real-time digitized signature (e.g. stylus/mouse)[2] 4. e-fax the prescription file (usually in PDF format) attachment directly to a pharmacy fax machine.	
		1. Add Rx folio number from Duplicate prescription to EMR prescription (don't need to fax duplicate) 2. Mail original duplicate to pharmacy

* Given the current COVID-19 crisis, any future Ministry or College audits will take circumstances into account.

[1] This document is intended for community prescribers. A separate document exists for Health Authority prescribers, please click here to access this document.

[2] A **real-time** digital signature on the prescription created with a mouse or stylus is preferred. An electronic signature (single, stored image) may be accepted. (See Appendix: How to Create Signatures & Sign Documents)

Privacy and Security: Best Practices

Computer (Windows and Mac)

- All computers (work and personal devices used for work) need to have a complex **password** to log onto the computer. (See DTO Password Management Guide (PDF) for best practices).
- If you are saving documents to your local computer, **delete** them after the purpose has been fulfilled. Do not forget to **delete** the emails from the trash as well. This will minimize unauthorized access or backup to cloud or hard drive storage etc. Contact DTOinfo@doctorsofbc.ca to explore processes and/or third party applications that can 'digitally shred' files on your computer.

Email account

- If you want to use email, please ensure that you are using a secure, encrypted email service for communication of patient data. It is **not recommended** to use email services such as Gmail, Hotmail, Yahoo, or other similar public and free services for sharing private patient data.
  - **Avoid using email to send faxes containing patient data –** This is not recommended because emails are generally unencrypted between you and the recipient's mail server.
    - Some fax applications allow you to send an email to send the fax. If you are using an email to send a fax, please ensure that you are using a secure, encrypted email service.
    - When using email to send a fax, a copy of the fax is stored on the email server. Best practice is to **delete** the sent email containing the fax once the fax confirmation has been received. Don't forget to **delete** the emails from trash as well.
- **Use a web browser to log in and send via your e-fax application**.
- **Use a printer driver to send the fax**. Determine if a printer driver can be used for your e-fax application. This will allow you to 'Print to Fax' in any document and will streamline your workflow.

Mobile devices

- Mobile devices (work or personal devices used for work) need to have a complex **passcode or biometric ID** to access the device.
- Ensure that each device has a short (2 minutes or less) auto-lock enabled to avoid unauthorized access if the phone is lost or stolen.
- Apple devices – recommended to turn off uploads to iCloud for apps used in the e-fax workflow**.**
- Android devices – recommended to turn off uploads to the Cloud for apps used in the e-fax workflow (E.g. Google Drive, Dropbox, Amazon Cloud, etc).
- After successfully sending the faxed documents, ensure that all images, PDFs, and other related documents are **deleted** from the device. Don't forget to **delete** the documents from the trash as well.

Fax Apps

- 'Attach fax to notification' email setting – if the settings allow this, switch the feature that attaches the original fax documents to the confirmation email off.
- Fax retention setting – if the settings allow this, it is recommended to set this to 'zero' timeframe (E.g. 0 Months) for both sent and received faxes. This means that the fax will not be saved on the fax provider's data centre.
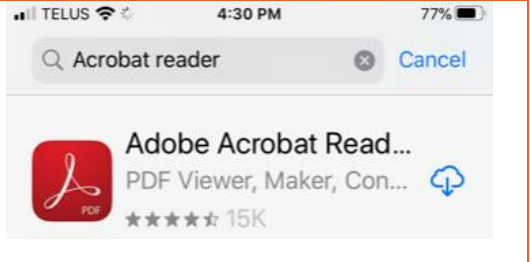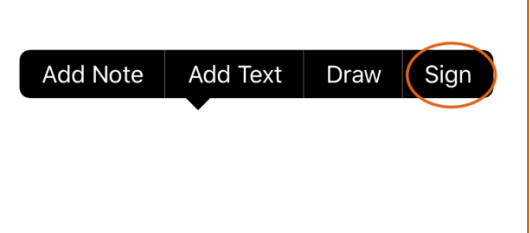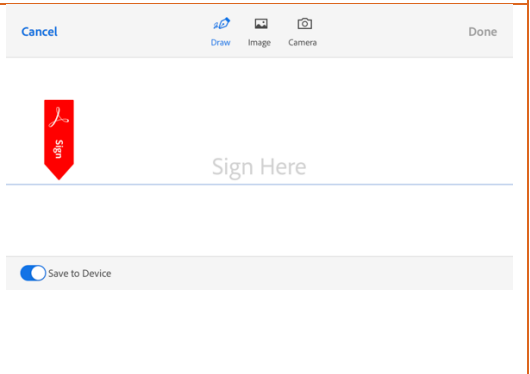
Fax Disclaimer: Example

Here is a fax disclaimer template that can be used on your cover page:

Confidentiality Warning: This message is intended only for the use of the individual or entity to which it is addressed, and may contain information which is privileged, confidential, proprietary or exempt from disclosure under applicable law. If you are not the intended recipient or the person responsible for delivering the message to the intended recipient, you are strictly prohibited from disclosing, distributing, copying or in any way using this message. If you have received this communication in error, please notify the sender, and destroy and delete any copies you may have received.

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Appendix: How to Create Signatures & Sign Documents

How to sign a document – Using Acrobat Reader (Mobile device)

|	
Download the Adobe Acrobat Reader App Using *Adobe Acrobat Reader*, you can add a signature to a PDF document. 1. Open the App Store on your Mobile Device. Search for 'Acrobat reader'. Download to the device. ▪ Note: You do not need to register for an account with Adobe.	ꞏꞏꞏ TELUS 🌐 4:30 PM 77% 🔍 Acrobat reader ⊗ Cancel Adobe Acrobat Read... PDF Viewer, Maker, Con... ☁ ★★★★½ 15K
Open the App 2. Open the App, you **do not** need an account and **do not** need to sign in. Click the 'X' in the top right corner. 3. **Click on the document to open.** The quickest way to create a signature is by opening a PDF document you would like signed.	
Create the Signature 4. Tap on the document where you want to add a signature. Click 'Sign'.	Add Note Add Text Draw (Sign)

Create the Signature
 	
5. In the Sign window you have three options:
   ▪ Draw – your name on your touch screen
   ▪ Image – upload an image of your signature
   ▪ Camera – take a picture of your signature
6. If using the camera, you will be asked permission for the App to access your camera, say 'Yes'.
7. Follow prompts
8. You have a choice to save the signature, which you can reuse
	Cancel Draw Image Camera Done
	
	Sign Here
	
	◯ Save to Device

Add the signature to a PDF document 9. Open the document in Acrobat Reader 10. Tap on the screen and hold 11. Click Sign 12. Move the signature to the desired location on the document, and resize as desired 13. Save the PDF document, the signature is now embedded.	

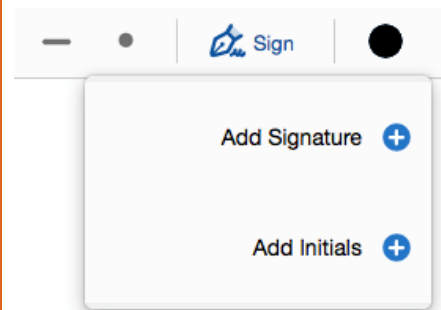# How to sign a document – using Acrobat Reader (Windows and Mac)

|	

Create a signature using Acrobat Reader
 	
 ▪ Using Acrobat Reader, you can add a signature to your document.
 ▪ Acrobat Reader is a free download (https://get.adobe.com/reader/). You do not need to register an account with Adobe.
 ▪ The quickest way to create a signature is by opening a PDF document you would like signed.
 	
 2. Click on the Sign button
 3. Click Add Signature
 4. You have three options:
     ▪ Type – using your keyboard (not recommended)
     ▪ Draw – using your mouse or touch screen
     ▪ Image – use a pre-saved image of your signature
 5. Follow prompts
 6. You have a choice to save the signature, which you can reuse
	Acrobat Reader toolbar (image is showing the rightside of the toolbar)
	
	 Sign
	
	 Sign
	
	 Add Signature ⊕
	
	 Add Initials ⊕
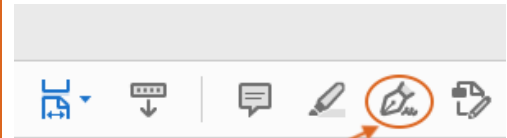
Add the signature to a PDF document 7. Open the document in Acrobat Reader 8. Click on the Sign button 9. Click on the Signature 10. Move the signature to the desired location on the document 11. Click to place the signature, and resize as desired 12. Save the PDF document, the signature is now embedded	

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How to sign a document – using Preview with a Mac

Create a signature using Preview on a Mac
 	
Using Preview, you can add a signature to your document. The quickest way to create a signature is by opening a PDF document you would like signed.
1. Click on the Show Markup Toolbar button
2. Click on the Sign button
3. Click Create Signature
4. You have two options:
    ■ Trackpad – Sign your name on your trackpad, or
    ■ Camera – Sign a piece of white paper and hold it up to the camera on your Mac
5. Follow prompts
6. Both options save the signature, which you can reuse
	
	Show Markup Toolbar
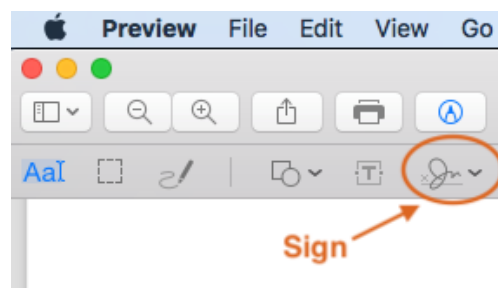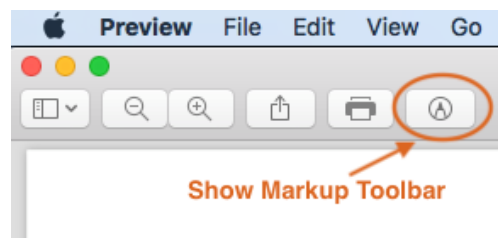	
	Sign

Add the signature to a PDF document
 	
7. Open the document in Preview
    ■ Click on the Show Markup Toolbar button
    ■ Click on the Sign button
    ■ Click on the signature you wish to add
    ■ Move the signature to the desired location on the document, and resize as desired
8. Save the PDF document, the signature is now embedded	

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![DTO Doctors Technology Office - A GPSC initiative]

Appendix: Example Images of 'Send a Fax' Screen

SRFax: Example image of sending a fax using a web browser

Send a Fax

Sender	▬▬▬▬▬▬ ⌄
Type of Fax	◉ Single Fax ○ Broadcast Fax
Enter Destination Fax #	1
	☐ SAVE TO ADDRESS BOOK
Reference # (Optional):	
# of Retries	3 ⌄
Include Cover Page	☑
Select Cover Page	Standard ⌄
To Name	
Organization	
From	Wil Schur
Subject	
Comments	Formats ▾ B I U ☰ ☰ ☰ ☰ ☰ ☰
Schedule for Later Delivery	☐

Attachments

NOTE: Maximum size of EACH attachment is 50 MB. For a list of supported file formats click here

SELECT FILE >

Files uploaded for this fax:
(Drag & drop files or use Select Files button)

Drop files here

SEND FAX >

eFax: Example image of sending a fax using a web browser

This document is intended to provide a high level overview of workflows and tools when using e-fax. For a more detailed discussion please contact DTO (see below). We also encourage you to speak to your EMR vendor and local IT professional to learn more about e-faxing options and best practices.

Doctors Technology Office (DTO) is here to support you, please reach out with your virtual care questions to:
📞 604 638-5841 ✉ DTOinfo@doctorsofbc.ca 🌐 www.doctorsofbc.ca/doctors-technology-office