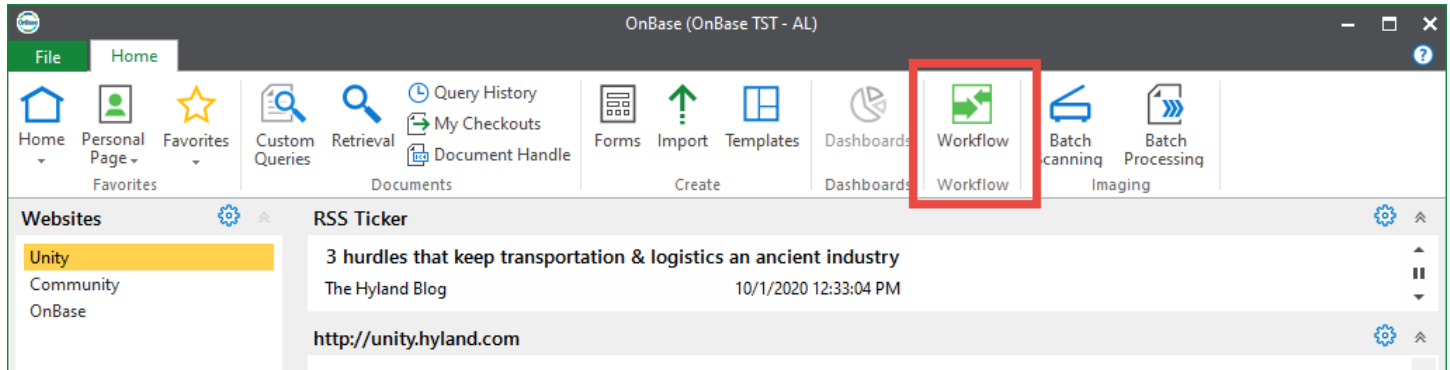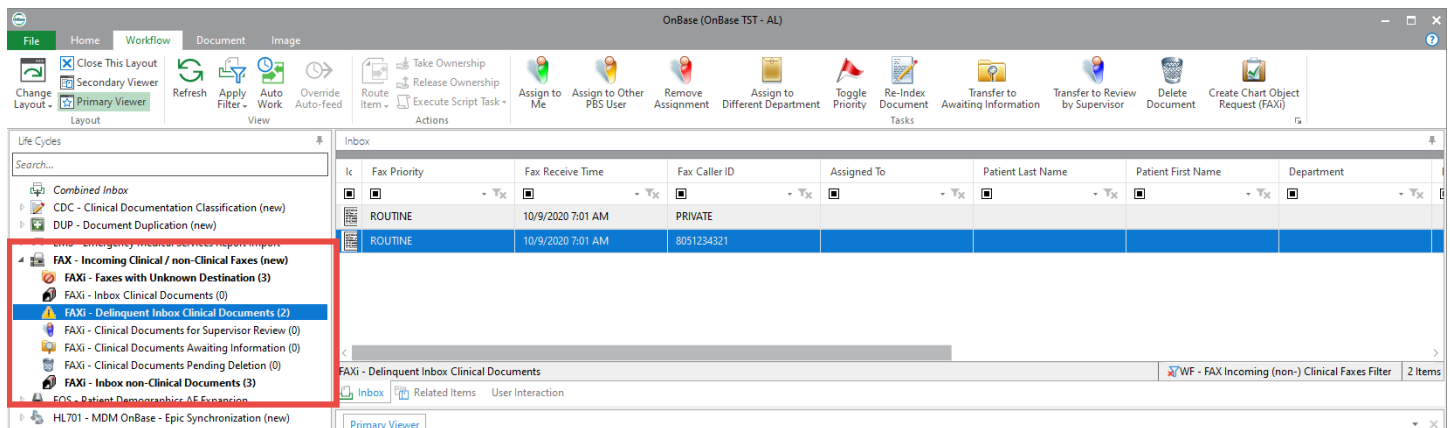# USE ONBASE TO MANAGE INCOMING FAXES

Incoming Faxes

When faxes are sent to Cottage Health, the documents are automatically imported into OnBase and routed to the appropriate workqueue for processing.

In OnBase, select **Workflow** to access the workqueue for your department.

The **FAX Incoming Clinical / non-Clinical Faxes** workflow will be listed on the left.


Expand the incoming fax workflow to see the available workqueues.

- **FAXi – Faxes with Unknown Destination**
- **FAXi – Inbox Clinical Documents**
- **FAXi – Deliquent Inbox Clinical Documents**
- **FAXi – Clinical Documents for Supervisor Review**
- **FAXi – Clinical Documents Awaiting Information**
- **FAXi – Clinical Documents Pending Deletion**
- **FAXi – Inbox non-Clinical Documents**

To complete documents in the workqueue:

1. Select the document.
2. Review the document in the lower panel.
3. Select a Task.
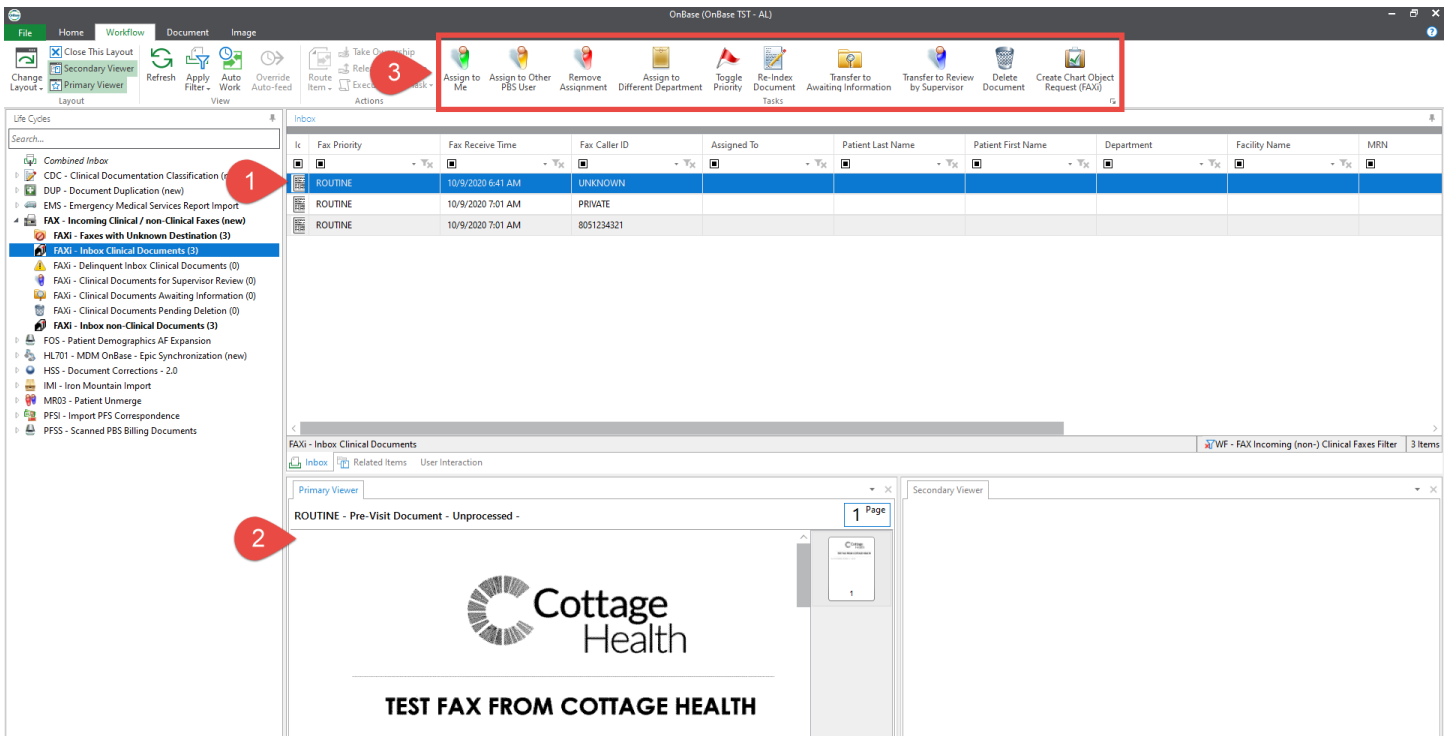
Tasks

Available tasks will vary based on the selected workqueue and role. The most common tasks are:

o **Re-Index Document** – use this task to send the fax to a patient's record in CottageOne.
o **Assign to Department** – use this task for faxes that are sent to the wrong department.
o **Transfer to Awaiting Information** – use this task for faxes that require more information before they can be completed.
o **Transfer to Review by Supervisor** – use this task for faxes that need to be reviewed by your supervisor.
o **Delete Document** – use this task for faxes that need to be deleted (i.e. unsolicited offers, junk mail, etc.). After deletion, the document will move to the Pending Deletion workqueue and can be recovered within 7 days.

Note: the task icons and labels will vary based on the size of the window.

Full screen:

Small Window:

Cottage Health **Tip Sheet**
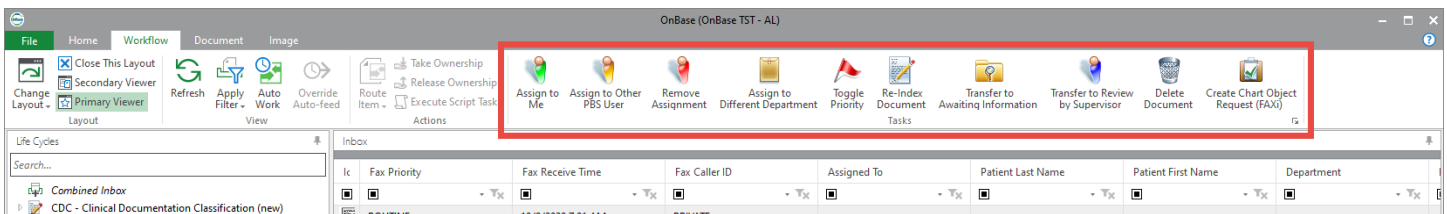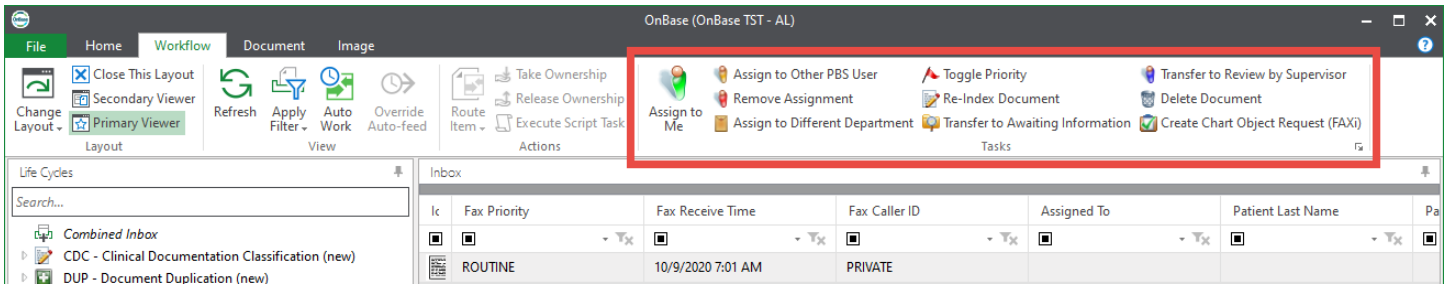
Re-Index Document

To assign a document to a patient's record in CottageOne, select **Re-Index Document.** The Workflow Re-Index window opens:

1. Update the Document Type Group to narrow the available document types.
2. Select a Document Type from the list.
3. The Document Type will determine which keywords are available and required.
4. Required keywords are listed in red.
5. After entering the MRN, CSN, or HAR, OnBase will pull the rest of the patient's information from CottageOne.
6. Fill in any addtitional fields as needed.
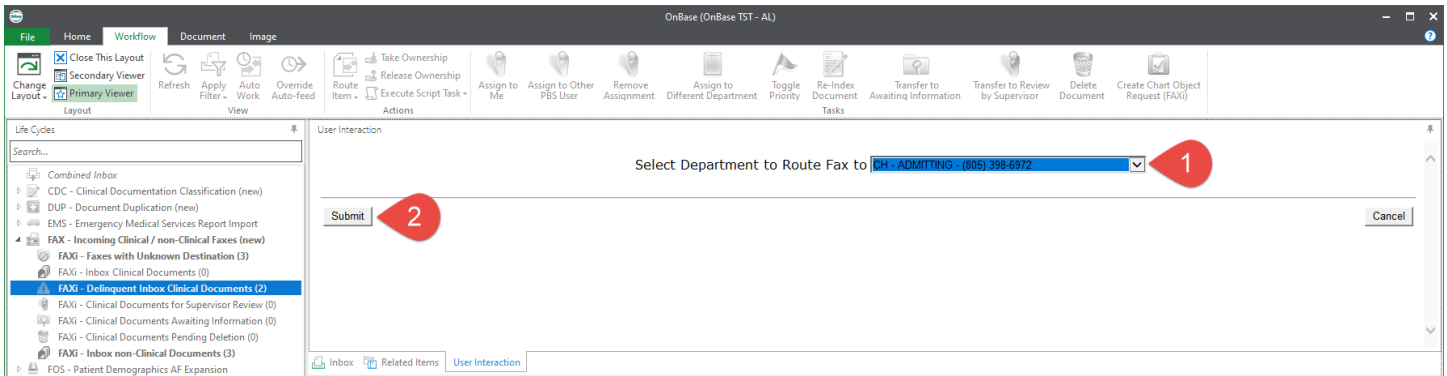7. Select **Re-Index** to send the document to CottageOne.
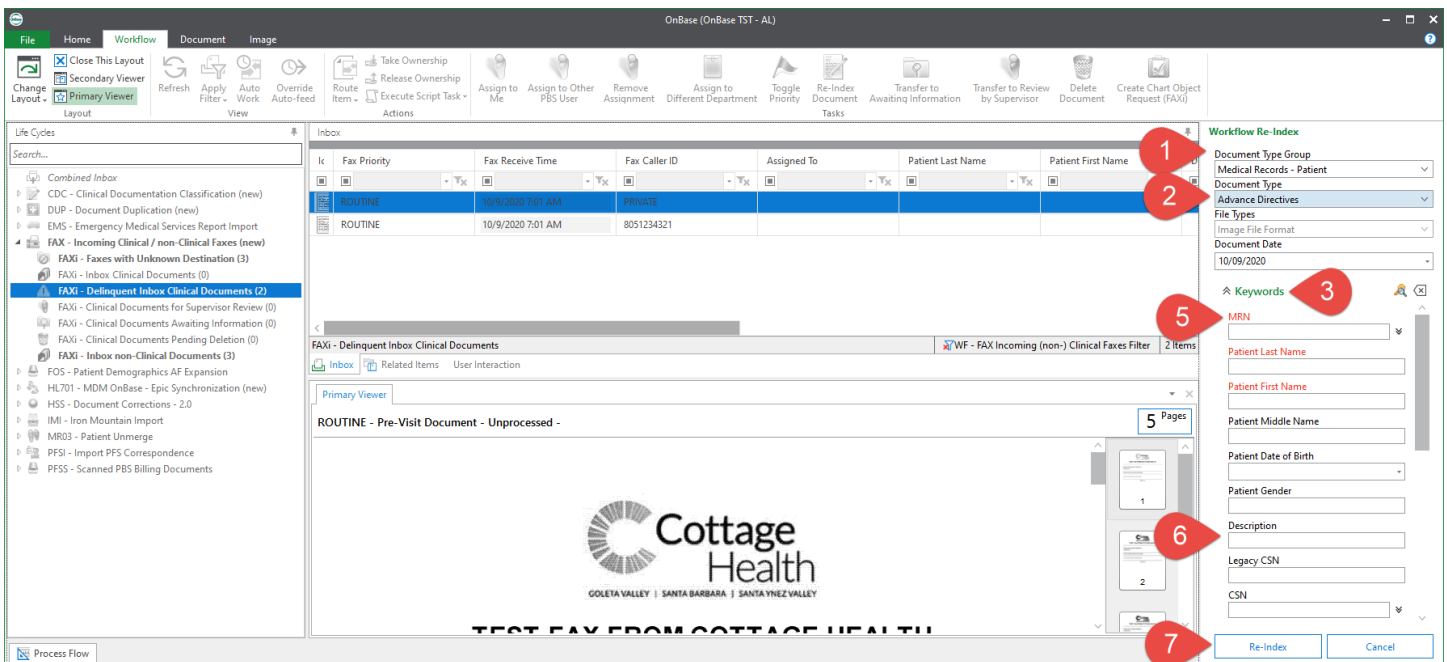
Note: after re-indexing, there is a few minute delay before documents show in CottageOne.

Assign to Department

If a document needs to be sent to another department, select **Assign to Different Department.**
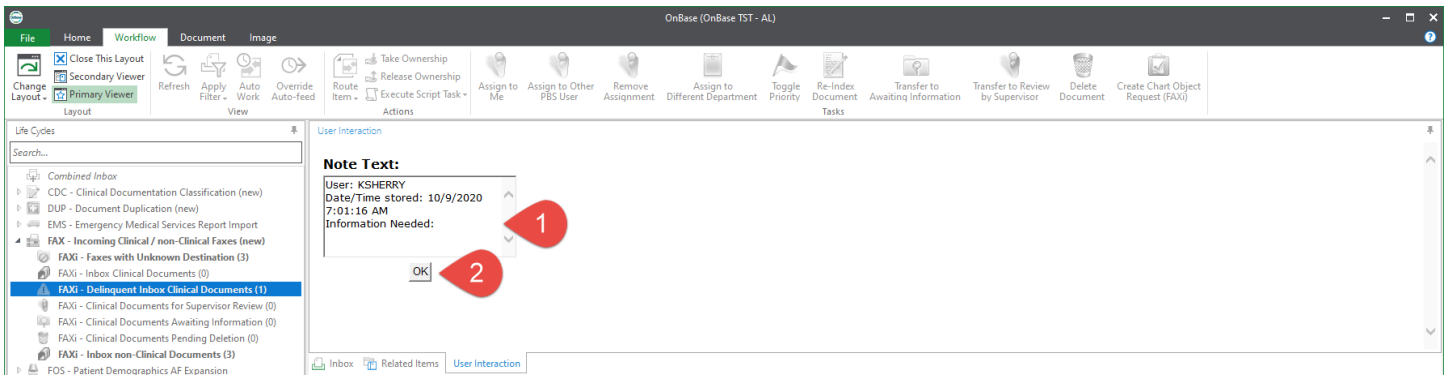
1. Select the correct department and fax number from the drop-down.
2. Select **Submit.**

Transfer to Awaiting Information

If additional information is needed before the fax can be acted on, select **Transfer to Awaiting Information.**

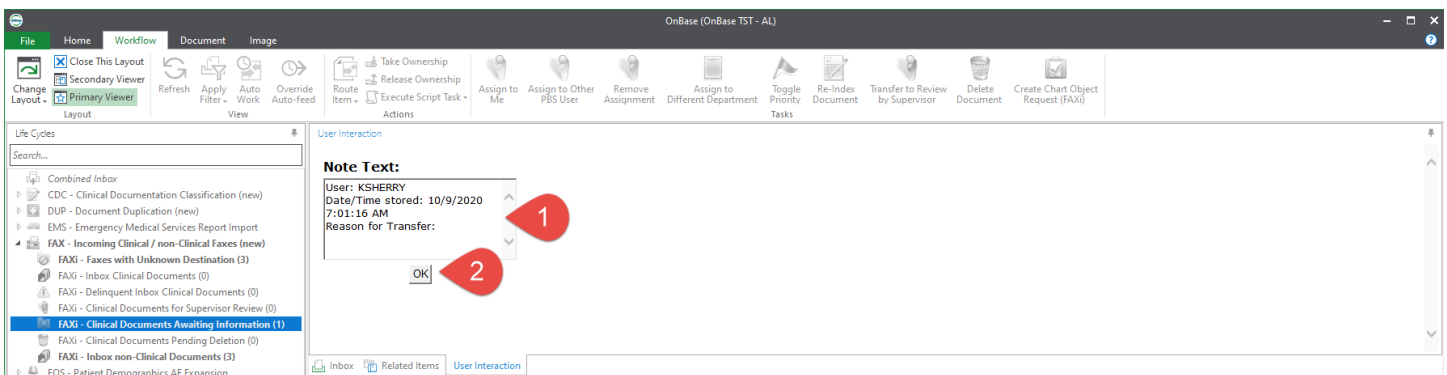1. Update the note to include what information is needed.
2. Select **OK.**

The fax is now listed in the **FAXi – Clinical Documents Awaiting Information** workqueue.

Transfer to Review by Supervisor

For documents that require review by a supervisor, select **Transfer to Review by Supervisor**.

1. Update the note to include the reason for transfer.
2. Select **OK**.

The fax is now listed in the **FAXi – Clinical Documents for Supervisor Review** workqueue.