stepworks

How to Send a Fax with Updox

Print to Fax

- Go to File and select Print.
- In the destination dropdown menu, select the Updox printer and press Print.
- Go back to the Updox inbox and hit refresh. (It's now a print entry in the inbox.)
- Tick the checkbox below the pages you want to fax.
- It now says "Send 1 Selected Page" on a button on the left. Click that.
- In the pop-up, enter a fax number or choose from your address book.
    - As you type, it gives you the option to add that number to your address book or just quick-send to that number. If it's a number you might need again, add it.
- On the compose screen in the next window, look at the left.
    - Enter a subject heading.
    - Make sure you select "Send a cover sheet."

We often fax confidential PHI. We're legally required by HIPAA to use a cover sheet.

    - After you select "Send a cover sheet," select the appropriate one for your facility or department. (If you don't see it, use the default template.)
    - **Important:** unselect "Send as practice" so faxes only go where they should.
- Leave the options on the right alone. ("Send paper fax and allow online access" is pre-checked.)
- Use the text field to enter information or details for the cover sheet.
- The recipient's fax number is on the right.
    - What if you need to add another number?
        - Enter it and hit "Quick send."
        - On the left, complete the process and add the cover sheet.
- Hit Send.
- Back in the inbox, the page we just faxed now has the "Used" icon over it.

Stepworks, LLC
P.O. Box 6209, Elizabethtown, KY 42702 | Phone: 1-800-545-9031

Updated 08/16/2022

Upload to Fax

- At the top, hit Compose.
- Type the fax number or get it from your address book.
- You can attach the document at the bottom of the next window.
- Click the plus icon (+) and choose the file.
    - If it doesn't seem to be doing anything, be patient. Sometimes it takes some time to upload.
    - Then you should see all pages of the document.
- Enter everything like you did with Print to Fax. (Select the cover sheet; enter the subject and information fields; unselect "Send as practice.")
- Hit Send.