



# Practices Will Be Paperless

VERSION 1

*Updox's Practice Transformation Series provides evidence and expert opinion on the future of healthcare and shares best practices on how to transform your practice to deliver the best in-person and virtual care.*

*In 2017, the Centers for Medicare & Medicaid Service (CMS) Administrator, Seema Verma, launched the "Patients over Paperwork" initiative to help patients by allowing doctors and non-physician practitioners to focus on care instead of paperwork. She called for a transformation in patient care by improving communication and data exchange and challenged the healthcare industry to be "a fax-free zone by 2020".<sup>1</sup> However, more than 9 billion faxes are still sent every year in healthcare, and fax still accounts for 75% of all medical communication.<sup>2</sup> These numbers do not even account for the paperwork completed by patients and collected by practices, which negatively impacts the patient experience, efficiency and profitability of your practice.. This guide will assist your practice with transitioning to a paperless practice.. To learn more, visit [updox.com](https://www.updox.com).*

# Get Started

Set your practice up for long-term success by implementing these essential steps to get started.

1

## Identify Practice Champions

Select one or more individuals to champion the creation of a paperless practice. The practice champion(s) will:

- Determine and evaluate goals
- Evaluate and pilot technology
- Develop workflow
- Lead trainings
- Implement a patient communication plan

2

## Review Federal and State Laws and Regulations

It is important to review federal and state laws and regulations for documentation and communication requirements. Requirements to review include, but are not limited to:

- Consent
- Liability
- Licensure
- Prescribing
- Privacy and Security
- Reimbursement

3

## Familiarize Yourself with Updox Resources

Updox has a number of resources available to ensure your practice's success.

- **[Updox Website:](#)**  
updox.com
- **[Updox Community:](#)**  
Our online customer Community allows users to ask questions and view best practices on using Updox products. We also have an extensive Learning Center with training videos and written job aides.
- **[Updox Support:](#)**  
Our support team is available live via chat or by email to assist.

# Axe the Fax

*Before unplugging the fax machine, customize your electronic faxing set-up to optimize your practice's productivity and experience.*

## General

- Create users
- Port your fax line to transfer your existing fax number
- Add fax and printer drivers so you can fax out
- Organize the Updox Inbox with queues and tags
  - Queues allow you to auto-route incoming documents based on their purpose. Users can be assigned to specific queues and can be notified via email or text when a document is routed to the queue.
  - Tags allow you to quickly and visually triage documents. Items can also be filtered according to the tag color.
- Save and/or upload key contacts in your Updox address book

## Inbound Fax

- Assign user(s) responsible for daily incoming faxes
- Identify actions for incoming faxes
  - Edit and reply to sender
  - Route to another user to take action
  - Send and save to patient chart

## Outbound Fax

- Create custom cover sheets
- Electronically print to fax to quickly send documents from anywhere
- Electronically print to Updox to complete these actions before sending
  - Edit the document
  - Combine with other documents
  - Select multiple contacts

# Convert to Electronic Forms

Use this checklist to inventory paperwork and identify other items that can be converted to electronic forms.

## Administrative Forms

- New patient information
- HIPAA release
- Financial policy acknowledgment
- Records release
- FMLA certification
- Telehealth consent

## Clinical Forms

- Screenings and assessments
- COVID-19 screening
- Past medical history
- Medication history
- Medication refill request

## Other Items

- Driver's license
- Insurance
- Health logs  
(ex. Blood glucose, blood pressure, weight, and others)
- Medication lists

# Train Your Practice

Train providers, staff, and patients about your new paperless practice.

## Providers and Staff

- How to access Updox on various devices
- Individual roles and responsibilities
- Differences between paper and electronic fax
- How and when patients will access electronic forms
- How to view and take action on documents and completed forms
- How to troubleshoot technical issues

## Patients

- Access to electronic forms via URL in a text, email, or on the website
- Clear directions on how and when a form must be completed
- Expected changes for their visit as a result of forms

## Resources

1. Morse S. HIMSS Media. Clinical CMS Administrator Seema Verma calls for an end to physician fax machines by 2020. 2018 Aug 6. Retrieved from <https://www.healthcareitnews.com/news/cms-administrator-seema-verma-calls-end-physician-fax-machines-2020>.
2. Updox. Through Digital Document Management, Updox Eliminated One Billion Fax Pages Ahead of CMS' Call for A Fax-Free Healthcare System By 2020 [Press Release]. 2019, Dec 3. Retrieved from <https://blog.updox.com/company/news-press-releases/through-digital-document-management-updox-eliminated-one-billion-fax-pages-ahead-of-cms-call-for-a-fax-free-healthcare-system-by-2020>.