| | **Operational Guideline:** Fax Machine-Operation and Downtime Procedure | **Guideline Number:** PCOG#35 |
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| **PRIMARY HEALTH CARE OPERATIONAL GUIDELINE** | **Approved By:** Primary Health Care Leadership | **Pages:** 1 of 3 |
| | **Approval Date:** January 20, 2020 | **Supersedes:** December 9, 2016 |

## 1. INTENT:

- To outline a consistent best practice to support daily operation and functionality of the fax machines at sites to eliminate the patient safety risk of faxes not going to the receiver (i.e., Laboratory, Diagnostic referrals to Specialty, etc).
- To outline a consistent best practice for faxing in the event of malfunction of the Digital Health and Vendor supported fax machines (i.e., Ricoh and Lexmark).

## 2. GUIDELINE:

### Recommendations to Support Daily Operation:

- Sites shall coordinate the device print settings as described below through the Vendor (i.e., Ricoh or Lexmark).
    - The fax machine should be set to print an "error report" every time an outgoing fax fails to send after 3 attempts. This report is either returned to the sender or to a Primary Care Assistant (PCA) to determine why the fax failed and to re-send the fax, ensuring the number is correct.
    - The fax machine should be set to print a fax log automatically at the interval preferred by that site (i.e., every two hours, daily, etc) – or after a certain number of faxes have been sent. The log will allow sites to confirm successful transmission of all documents.
- Community Accuro sites should coordinate their call forward feature through the Digital Health Service Desk.
- Sites should have their fax machine in close proximity to the PCA's. If a site does not receive a document into the Electronic Medical Record (EMR) at a minimum of once every ½ hour (or whatever interval works from an operational perspective), best practice would be to question why. Consider building into a PCA role; suggest Document Manager and a designated backup.
- The Document Manager/designated backup is expected to check the fax manager within the EMR on a regular basis (i.e., twice daily or based on clinic volume).
    - When a fail is indicated in the EMR, the Document Manager/designated backup should attempt to resend.
    - If a second fail is indicated, Document Manager/designated backup should print the document and fax manually.
    - The issue should be reported to Digital Health Service Desk for follow up.
- Fax Machine Operating Instructions can be obtained by contacting your device representative direct (contact information listed below).

### Photocopier Usage & Troubleshooting:

- The Senior PCA (or designated backup) should be immediately notified of any malfunction to the fax machine so it can be call forwarded to an alternate temporary fax line.
- If "call forward" cannot be activated immediately, ensure measures are taken to attempt to notify regular contacts via phone, email, or another fax machine of the down time along with alternate temporary fax instructions. Primary Care Clinic contacts should include

regular contacts such as Pharmacies, Labs, Diagnostic or Pathology Services to advise these senders to monitor their error reports of possible failed sent documents to the receiving primary care site.

- To **"activate"** call forward:
  - Before "call forward" to another fax line can happen, this feature must be pre-arranged through MTS.
  - Unplug the fax line (white cord) from outlet.
  - Plug telephone set into the fax line outlet (note: only a single-line phone set can be used).
  - Press *72. After a series of "beeps", enter the fax number (including area code) you wish to forward the line to **(204-XXX-XXXX)**.
  - Once activated, you will hear ringing and then a fax tone; wait until sounds stop, then release the phone (hang up but leave the phone set plugged into the outlet). Call forward is now in effect.
- To **"deactivate"** call forward:
  - Press *73.
  - Unplug the phone set and plug the fax line (white cord) back into the fax outlet.
- If you require photocopier **assistance or troubleshooting** for either your Ricoh or Lexmark device, contact:

| WBM Technologies (Ricoh) | 1-888-275-4926 or 204-944-4777 |
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| Konica Minolta (Lexmark) | Digital Health Service Desk 204-940-8500 |

- If you require photocopier **parts or service request**, contact Ricoh Canada (1-877-335-4566) and follow the prompts (machine model and serial numbers may be required).

### 3. REFERENCE/CONSULTATION:
- In consultation with CSIS Support, Digital Health, Primary Health Care Leadership, Community Area Directors and Regional Primary Health Care Quality Team (December 2019 & January 2020)

### 4. AUTHOR:
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### 5. ALTERNATE CONTACTS:
- Jo-Anne Kilgour - Program Specialist-Primary Health Care
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**SCOPE:** Applicable to all WRHA Primary Care Direct Operated Clinics, Walk In Connected Care Clinics (including McGregor, Access Winnipeg West and Access Fort Garry), Antenatal Home Care and Midwifery Services