

# DOCTORS TECHNOLOGY OFFICE GUIDE TO E-FAXING WHEN WORKING REMOTELY

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## Purpose of this Guide

This guide is intended for physicians and MOAs that are **unable to use their clinic fax processes for sending documents** when they are at home or working remotely. It provides an overview of the workflows and tools for adding signatures and e-faxing documents such as, prescriptions, lab requisitions, and referrals.

If you are unsure about the e-fax capabilities of your EMR and the ability to add signatures to documents, please contact your EMR vendor for the most up-to-date information.

## 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 if you have questions or would like support from a peer mentor.

📞 604 638-5841 ✉ [DTOinfo@doctorsofbc.ca](mailto:DTOinfo@doctorsofbc.ca)

🌐 [www.doctorsofbc.ca/doctors-technology-office](http://www.doctorsofbc.ca/doctors-technology-office)

## EMRs

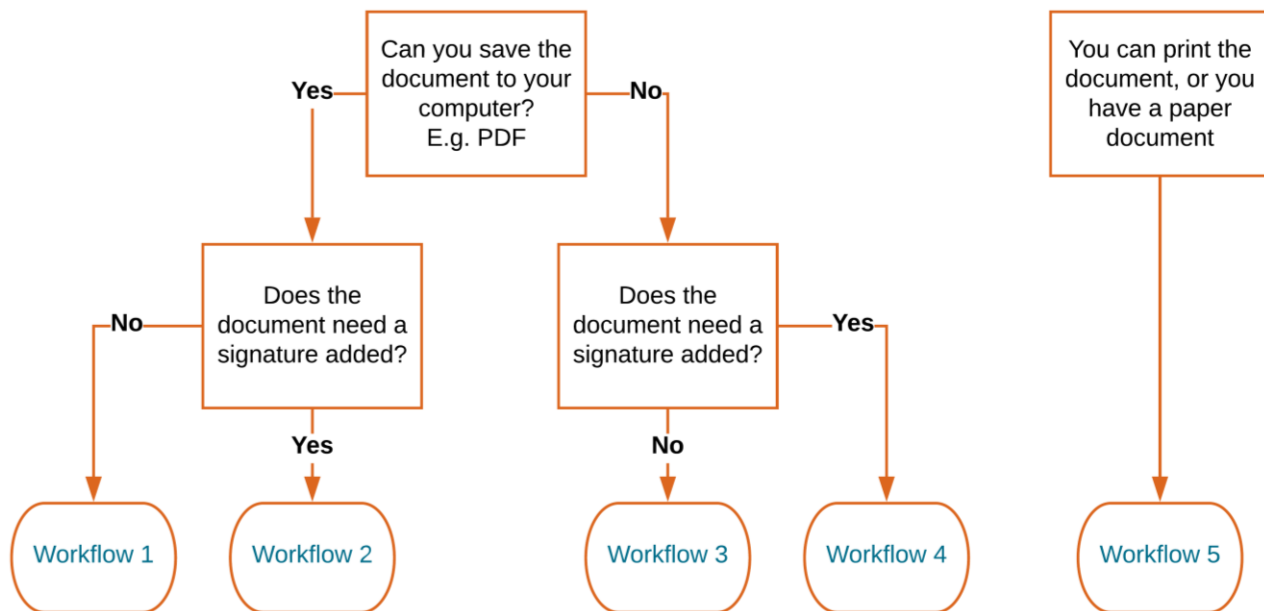
If you are unsure about the e-fax capabilities of your EMR and the ability to add signatures to documents, please contact your EMR vendor for the most up-to-date information.

- 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](mailto: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.

<p><b>Mac and Windows users</b></p> <p>Tools needed</p> <ul style="list-style-type: none"> <li>▪ e-Fax solution</li> </ul>	
<p>Send the fax</p> <ol style="list-style-type: none"> <li>1. Login to your e-fax solution in your web browser</li> <li>2. Click Send Fax</li> <li>3. Enter the fax number</li> <li>4. Enter the pertinent information</li> <li>5. If your cover sheet does not contain a disclaimer, you can add the one in this guide <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Fax Disclaimer: Example</a></li> </ul> </li> <li>6. Attach the documents you wish to send</li> <li>7. Click Send Fax</li> </ol>	<p>Notes</p> <ul style="list-style-type: none"> <li>▪ Given the insecure nature of email, it is recommended to login to your fax solution in your web browser to send a fax <ul style="list-style-type: none"> <li>▪ E.g. Some e-fax solutions allow you to send a fax as an email with attached documents</li> </ul> </li> <li>▪ It is recommended that you delete the documents from your computer once you have received a successful fax confirmation</li> </ul>

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

<p><b>Mac and Windows users</b></p> <p>Tools needed</p> <ul style="list-style-type: none"> <li>▪ e-Fax solution</li> <li>▪ PDF writer App</li> </ul>	
<p><b>Sign your PDF document</b></p> <ol style="list-style-type: none"> <li>1. Open the document in your PDF writer</li> <li>2. Add your signature <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Appendix – How to Create Signatures &amp; Sign Documents</a></li> </ul> </li> <li>3. Save your document</li> </ol>	
<p><b>Send the fax</b></p> <ol style="list-style-type: none"> <li>1. Login to your e-fax solution in your web browser</li> <li>2. Click Send Fax</li> <li>3. Enter the fax number</li> <li>4. Enter the pertinent information</li> <li>5. If your cover sheet does not contain a disclaimer, you can add the one in this guide <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Fax Disclaimer: Example</a></li> </ul> </li> <li>6. Attach all the documents you wish to send</li> <li>7. Click Send Fax</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ Given the insecure nature of email, it is recommended to login to your fax solution in your web browser to send a fax <ul style="list-style-type: none"> <li>▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax</li> </ul> </li> <li>▪ It is recommended to delete the documents from your computer once you have received a successful fax confirmation</li> </ul>

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

<p><b>Mac users only</b></p> <p>If using macOS Mojave 10.14 (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</p> <p>This involves using the <b>Continuity Camera</b> in Finder</p> <ul style="list-style-type: none"> <li>▪ Both devices need to be signed into iCloud</li> <li>▪ You can take a picture with your iPhone/iPad, and then save the picture directly on your Mac</li> <li>▪ Follow <a href="#">Workflow 1</a></li> </ul>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ More information from Apple can be found <a href="#">here</a></li> </ul>
<p><b>Mac and Windows users</b></p> <p><b>Tools needed</b></p> <ul style="list-style-type: none"> <li>▪ e-Fax solution</li> <li>▪ Scanning App</li> </ul>	
<p><b>Display the document on your screen</b></p> <ol style="list-style-type: none"> <li>1. Open the document on the screen</li> <li>2. Position the document, and try to display a single page on the screen</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ If necessary, scan the top of the page and bottom of the page as different documents</li> </ul>
<p><b>Scan the document – using a Scanning App</b></p> <ol style="list-style-type: none"> <li>3. Open a Scanning App on your mobile device</li> <li>4. Scan the document</li> <li>5. Save the document</li> <li>6. Repeat if the document has more than one page</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ If the image is not clear, try turning off the flash</li> <li>▪ Some Scanning Apps have a feature which helps with glossy documents/screen capture <ul style="list-style-type: none"> <li>▪ (E.g. TurboScan takes 3 images and consolidates them into 1 document)</li> </ul> </li> </ul>
<p><b>Send the fax</b></p> <ol style="list-style-type: none"> <li>7. On your mobile device use a web browser to login to your e-fax solution</li> <li>8. Click Send Fax</li> <li>9. Enter the fax number</li> <li>10. Enter the pertinent information</li> <li>11. If your cover sheet does not contain a disclaimer, you can add the one using this guide <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Fax Disclaimer: Example</a></li> </ul> </li> <li>12. Attach all the documents you wish to send</li> <li>13. Click Send Fax</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ You can open the fax solution via a web browser or via the fax solution app on your mobile device</li> <li>▪ Given the insecure nature of email, it is <b>recommended to login to your fax solution using a web browser</b> to send a fax <ul style="list-style-type: none"> <li>▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax</li> </ul> </li> <li>▪ It is recommended that you delete the documents from your mobile device once you have received a successful fax confirmation</li> </ul>

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

#### Mac users only

If using macOS Mojave 10.14 (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

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](#)

#### Notes

- More information from Apple can be found [here](#)

**Mac and Windows users** - Please see the next page

<p><b>Mac and Windows users</b></p> <p>Tools needed</p> <ul style="list-style-type: none"> <li>▪ e-Fax solution</li> <li>▪ Scanning App</li> <li>▪ PDF writer App</li> </ul>	
<p><b>Display the document on your screen</b></p> <ol style="list-style-type: none"> <li>1. Open the document on the screen</li> <li>2. Position a single page document on the screen</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ If necessary, scan the top of the page and bottom of the page as different documents</li> </ul>
<p><b>Scan the document – using a scanning App</b></p> <ol style="list-style-type: none"> <li>3. Open the scanning App on your mobile device</li> <li>4. Scan the document</li> <li>5. Save the document</li> <li>6. Repeat if the document has more than one page</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ If the image is not clear, try turning off the flash</li> <li>▪ Some Scanning Apps have a feature which helps with glossy documents/screen capture <ul style="list-style-type: none"> <li>▪ E.g. TurboScan takes 3 images and consolidates this into 1 document</li> </ul> </li> </ul>
<p><b>Sign your PDF document</b></p> <ol style="list-style-type: none"> <li>7. Open the document in your PDF writer</li> <li>8. Add your signature <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Appendix – How to Create Signatures &amp; Sign Documents</a></li> </ul> </li> <li>9. Save your document</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ If using TurboScan, open the document directly in Acrobat Reader</li> <li>▪ If using the eFax App (efax.com) you can open the document directly in the eFax App, sign the document and fax the document</li> </ul>
<p><b>Send the fax</b></p> <ol style="list-style-type: none"> <li>10. Login to your e-fax solution in your web browser</li> <li>11. Click Send Fax</li> <li>12. Enter the fax number</li> <li>13. Enter the pertinent information</li> <li>14. If your cover sheet does not contain a disclaimer, you can add the one in this guide <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Fax Disclaimer: Example</a></li> </ul> </li> <li>15. Attach all the documents you wish to send</li> <li>16. Click Send Fax</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ You can open the fax solution in your web browser or via e-faxing app on your mobile device</li> <li>▪ Some fax solutions have a mobile app</li> <li>▪ Given the insecure nature of email, it is recommended to login to your fax solution in your web browser to send a fax <ul style="list-style-type: none"> <li>▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax</li> </ul> </li> <li>▪ It is recommended to delete documents from your mobile device once you have received a successful fax confirmation</li> </ul>

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

<p><b>Mac users only</b></p> <p>If using macOS Mojave 10.14 (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</p> <p>This involves using the <b>Continuity Camera</b> in Finder</p> <ul style="list-style-type: none"> <li>• Both devices need to be signed into iCloud</li> <li>• You can take a picture with your iPhone/iPad, and then save the picture directly on your Mac</li> <li>• Follow <a href="#">Workflow 1</a></li> </ul>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ More information from Apple can be found <a href="#">here</a></li> </ul>
<p><b>Mac and Windows users</b></p> <p><b>Tools needed</b></p> <ul style="list-style-type: none"> <li>▪ e-Fax solution</li> <li>▪ Scanning App</li> </ul>	
<p><b>Scan the document – using a home printer/scanner</b></p> <ol style="list-style-type: none"> <li>1. If you have a printer with a scanner, you can scan this document to your computer</li> <li>2. Follow <a href="#">Workflow 1</a></li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ Many printers have scanning capability</li> </ul>
<p><b>Scan the document – using a scanning App</b></p> <ol style="list-style-type: none"> <li>3. Open the scanning App on your mobile device</li> <li>4. Scan the document</li> <li>5. Save the document</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ If the image is not clear, you can try turning off the flash</li> <li>▪ Some Scanning Apps have a feature which helps with glossy documents/screen capture <ul style="list-style-type: none"> <li>▪ E.g. TurboScan takes 3 images and consolidates this into 1 document</li> </ul> </li> </ul>
<p><b>Send the fax</b></p> <ol style="list-style-type: none"> <li>6. Login to your e-fax solution in your web browser (or mobile app)</li> <li>7. Click Send Fax</li> <li>8. Enter the fax number</li> <li>9. Enter the pertinent information</li> <li>10. If your cover sheet does not contain a disclaimer, you can add the one in this guide <ul style="list-style-type: none"> <li>▪ See the section <a href="#">Fax Disclaimer: Example</a></li> </ul> </li> <li>11. Attach all the documents you wish to send</li> <li>12. Click Send Fax</li> </ol>	<p><b>Notes</b></p> <ul style="list-style-type: none"> <li>▪ You can open the fax solution in your web browser on your mobile device</li> <li>▪ Some fax solutions have a mobile app</li> <li>▪ Given the insecure nature of email, it is recommended to use your web browser to send a fax <ul style="list-style-type: none"> <li>▪ E.g. Some e-fax solutions allow you to send an email with attached documents to send a fax</li> </ul> </li> <li>▪ It is recommended to delete the documents from your mobile device once you have received a successful fax confirmation</li> </ul>



## 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](mailto:DTOinfo@doctorsofbc.ca).

### Electronic Faxing Apps

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

Tool	Key Information
<p><b><u>SRFax</u></b></p> <p>For information about how SRFax works, click <a href="#">here</a>.</p>	<ul style="list-style-type: none"> <li>▪ Faxes can be sent via a web browser (login required to the e-fax solution)</li> <li>▪ Option available to send fax via email (<b>Not recommended</b> as emails travel over the open internet from your computer to the recipient's mail server)</li> <li>▪ Faxes can be sent using a <b>printer driver</b></li> <li>▪ Toll free number or port your own fax number</li> <li>▪ Send multiple pages at the same time</li> <li>▪ Various healthcare plans available</li> <li>▪ Save a fax disclaimer which is automatically added to the cover page</li> <li>▪ Data is encrypted and stored on <b>Canadian</b> data centres</li> <li>▪ Approved and in use by <b>Vancouver Coastal Health Authority</b></li> </ul>
<p><b><u>Telus Business Connect</u></b></p>	<ul style="list-style-type: none"> <li>▪ Telus Business Connect Enhanced or Complete (<b>includes e-faxing</b>)</li> <li>▪ Faxes can be sent via a web browser (login required to the e-fax solution)</li> <li>▪ Faxes can be sent using their desktop application (Windows and Mac)</li> <li>▪ Faxes can be sent using a printer driver</li> <li>▪ Send multiple pages at the same time</li> <li>▪ Save a cover page which includes a fax disclaimer</li> <li>▪ Additional features include: phone line, text messaging, audio conferencing, and video conferencing</li> </ul>
<p><b><u>eFax</u></b></p> <p>For information about how eFax works, click <a href="#">here</a>.</p>	<ul style="list-style-type: none"> <li>▪ Faxes can be sent via a web browser (login required to the e-fax solution)</li> <li>▪ Option available to send fax via email (<b>Not recommended</b> as emails travel over the open internet from your computer to the recipient's mail server)</li> <li>▪ Toll-free number or port your own fax number</li> <li>▪ Send multiple pages at the same time</li> <li>▪ Mobile App with ability to sign documents</li> <li>▪ Data is stored on US data centres (<b>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</b>).</li> </ul>
<p><b>EMR Vendors</b></p>	<ul style="list-style-type: none"> <li>▪ Please contact your vendor for the most up-to-date information on e-faxing</li> </ul>
<p><b>Other e-fax providers</b></p>	<ul style="list-style-type: none"> <li>▪ There are other options available</li> </ul>

## Scanning Apps

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

Tool	Where to get the App	Key Information
<b>TurboScan</b> by Piksoft Inc	Mobile App stores	<ul style="list-style-type: none"> <li>Free App (there is also a paid version available)</li> <li>Scans the document</li> <li>Can also scan a document displayed on a computer screen</li> <li>Approved and in use by <b>Vancouver Coastal Health Authority</b></li> </ul>
<b>Other Apps</b>		<ul style="list-style-type: none"> <li>There are other options available</li> </ul>

## PDF Writer Apps

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

Tool	Where to get the App	Key Information
<b>Acrobat Reader</b> by Adobe	Mobile App stores  For Windows and Mac users, click <a href="#">here</a> .	<ul style="list-style-type: none"> <li>Free application</li> <li>Sign a PDF document from your Windows or Mac computer</li> <li>Sign a PDF document from your mobile device</li> <li>Create original signatures each time you sign a document</li> <li>Save a signature as an electronic signature</li> <li>Annotate documents as well</li> <li>Do not need to register an account with Adobe</li> </ul>
<b>Preview</b>	Mac users only.  Application is already available on Mac computers.	<ul style="list-style-type: none"> <li>Sign a PDF document from your Mac</li> <li>Create original signatures each time you sign a document</li> <li>Save a signature as an electronic signature</li> <li>Annotate documents as well</li> </ul>
<b>Other Apps</b>		<ul style="list-style-type: none"> <li>There are other options available</li> </ul>

## 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.

## Submitting: Prescriptions

### COVID-19 Response - Temporary Options for Wet Signature Req't for Community Prescribers<sup>1</sup> 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.

**Requirement:** 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	<ol style="list-style-type: none"> <li>1. Call in verbal order</li> <li>2. Mail in original duplicate</li> </ol>
Fax	<ol style="list-style-type: none"> <li>1. Be sure to include CPSBC license number and <b>current phone number</b> where prescriber can be reached</li> </ol>	<ol style="list-style-type: none"> <li>2. Add Rx folio number from Duplicate prescription to EMR prescription (don't need to fax duplicate)</li> <li>3. Mail original duplicate to pharmacy</li> </ol>
	<ol style="list-style-type: none"> <li>1. Generate prescription (e.g. using your EMR)</li> <li>2. Be sure to include CPSBC license number and current phone number, where the prescriber can be reached</li> <li>3. Add electronic (stored) or real-time digitized signature (e.g. stylus/mouse)<sup>2</sup></li> <li>4. e-Fax the prescription file (usually in PDF format) attachment directly to a pharmacy fax machine.</li> </ol>	<ol style="list-style-type: none"> <li>5. Add Rx folio number from Duplicate prescription to EMR prescription (don't need to fax duplicate)</li> <li>6. Mail original duplicate to pharmacy</li> </ol>
e-Fax (EMR with e-fax capability)		

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

<sup>1</sup> This document is intended for community prescribers. A separate document exists for Health Authority prescribers, please click [here](#) to access this document.

<sup>2</sup> A **real-time** digital signature on the prescription created with a mouse or stylus is required. An electronic signature (single, stored image) is not considered unique and cannot be used. (See [Appendix: How to Create Signatures & Sign Documents](#))

## Submitting: Requisitions

### COVID-19 Response – Submitting Requisitions to Medical Imaging Facilities Temporary Options for Practitioner Working from Home

**Issue:** practitioners working from home are seeing patients virtually and need a means to submit requisitions to public and private medical imaging facilities.

**Requirement:** medical imaging locations need to be able to authenticate and process requisitions.

**Current contact number must be included in the requisition.**

Below are the options for a practitioner submitting a medical imaging requisition to a health authority or a community radiology/ultrasound site.

Option	
Phone	Facilities cannot accommodate requisitions over the phone.
Fax	<ol style="list-style-type: none"> <li>1. Fax requisition directly to patient's requested service location after ensuring:               <ol style="list-style-type: none"> <li>a. Service location is open (some have been closed due to COVID-19)</li> <li>b. Patient understands they must go to that specific location</li> <li>c. The requisition includes <b>current phone number</b> where the practitioner can be reached</li> </ol> </li> </ol>
e-Fax (EMR with e-fax capability)	<ol style="list-style-type: none"> <li>1. Generate requisition (e.g. using your EMR).</li> <li>2. Add electronic (stored) or real-time digitized signature (e.g. stylus/mouse)<sup>1</sup>.</li> <li>3. e-Fax the requisition file attachment directly to a specific lab or medical imaging fax machine after ensuring:               <ol style="list-style-type: none"> <li>a. Service location is open (some have been closed due to COVID-19)</li> <li>b. Patient understands they must go to that specific location</li> <li>c. The requisition includes <b>current phone number</b> where the physician can be reached</li> </ol> </li> </ol>
Email to Patient  (NOT RECOMMENDED due to security)	<ol style="list-style-type: none"> <li>1. Generate requisition (e.g. using your EMR).</li> <li>2. Be sure to include a <b>current phone number</b>, where the practitioner can be reached.</li> <li>3. Add electronic (stored) or real-time digitized signature (e.g. stylus/mouse)<sup>1</sup>.</li> <li>4. Email the requisition file (usually in PDF format) attachment to the patient with instructions for them to <b>print the requisition and bring it to the medical imaging facility.</b></li> </ol> <p><b>Note: Most facilities cannot accommodate requisitions on mobile phones.</b></p>

#### Practitioner should advise patient:

- They must go to the location they have asked their physician to send the requisition.
- To help ease Medical Imaging site workflow, ask the patient to visit as soon as possible.

<sup>1</sup> A real-time digital signature on the requisition 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](#))

This page is also hosted on the PHSa COVID-19 Virtual Health Toolkit page which can be accessed [here](#).

## Submitting: LifeLabs Requisitions

LifeLabs have implemented a **centralized** process to accept fax and emails requisitions by offering additional workflow options for providers working remotely during COVID-19. Requisitions can be retrieved by any LifeLabs location the patient chooses to attend. Digital requisitions will be kept for 6 months.

### e-Faxing a patient's requisition:

- **Centralized** fax number for BC, which is processing requisitions for all BC locations: **1-888-674-0370**;
- Please create **one fax per patient**;
- Verify the **fax has been transmitted**;
- Ask your patients to **wait until the next day to visit one of the collection centres**. If that is not possible, it is recommended that they bring a physical or electronic copy of their requisition to the LifeLabs collection centre instead.

### Emailing a patient's requisition:

Providers are encouraged to email the requisition directly to the patient, who can either bring a printed or "digital" copy (email, saved PDF on smartphone, etc.) with them. LifeLabs will be able to direct patients when they arrive.

- Email a PDF copy of the requisition to the dedicated email address for BC: **PatientReqsBC@lifelabs.com**;
- Create **one email per patient**;
- Use **only the patient's legal first name and last name in the subject line** (ie "JANE DOE"). This subject line format allows the LifeLabs team to locate requisitions when the patient arrives;
- It is advisable to **copy the patient on the email so that they have a backup copy in case of any issues**.
- Ask your patients to **wait until the next day to visit one of the collection centres**. If that is not possible, it is recommended that they bring a physical or electronic copy of their requisition to the LifeLabs collection centre instead.

### LifeLabs ask that you please:

- **Ensure your patients visit us in a timely manner.** We are seeing a large volume of unprocessed requisitions months later;
- **Share with your patients, that if you have sent a verified fax to LifeLabs it should be in our system. There is no need to call LifeLabs for verification.** If we are unable to find the requisition, we will work with the patient to determine a solution to support them for their collection.
- **If you send the requisition to your patient, you do not need to fax or email it to us**, as we will only be processing the patient's copy.

**Disclaimer:** LifeLabs is accepting requisitions via email to support our patients who present to a Patient Service Centre with an electronic requisition. There is a risk of inappropriate disclosure when emailing a requisition from a public email domain. The sender is responsible for the security of the electronic copy of the requisition when it is on their mobile device or when it is emailed from the patient's public email domain to LifeLabs. LifeLabs will maintain the security of the requisition when it is received by LifeLabs.

Additional information on submitting LifeLabs requisitions is available on the LifeLabs website [here](#).

## 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:
  - It is recommended to save and edit them on an encrypted USB key that automatically encrypts the data it stores (about \$50) and secure it with a strong password. **Delete** the files after the purpose has been fulfilled.
  - If you are saving documents to your local computer, ensure to **delete** them after the purpose has been fulfilled. Do not forget to **delete** the documents from the trash as well. This will minimize unauthorized access or backup to cloud or hard drive storage, etc. Ideally, '**digitally shred**' the files on your computer.
  - Contact [DTOinfo@doctorsofbc.ca](mailto:DTOinfo@doctorsofbc.ca) to explore encrypted USB key options or processes/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.

## FAQs

[Can I fax from home without a landline fax/phone line?](#)

- Yes, you can fax from home without a landline fax/phone line. An online e-fax service hosts the fax number that you access through the internet.

[What is an electronic/digital 'wet signature'?](#)

- A unique real-time signature created with a mouse, stylus or a touch screen. Only considered a 'wet signature' if this signature is used once.

[Is a stored image of a signature considered a 'wet signature'?](#)

- Only if the image is used once, as a signature is only considered a 'wet signature' if it is unique every time.

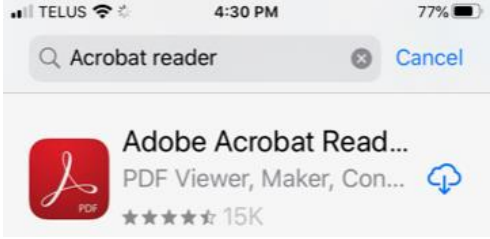

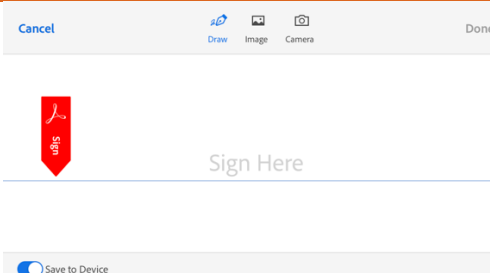
[Does my EMR support 'wet signatures'?](#)

- Please contact your EMR vendor for the most up-to-date information.



## Appendix: How to Create Signatures & Sign Documents

### Mobile Device: How to sign a document – Using Acrobat Reader

<p><b>Download the Adobe Acrobat Reader App</b></p> <p>Using Adobe Acrobat Reader, you can add a signature to a PDF document.</p> <ul style="list-style-type: none"> <li>Acrobat Reader is a free download. Note: You do not need to register an account with Adobe.</li> </ul> <ol style="list-style-type: none"> <li>Open the App Store on your Mobile Device. Search for 'Acrobat reader'. Download to the device.</li> </ol>	
<p><b>Open the App</b></p> <ol style="list-style-type: none"> <li>Open the App, you <b>do not</b> need an account and <b>do not</b> need to sign in. Click the 'X' in the top right corner.</li> <li><b>Click on the document to open.</b> The quickest way to create a signature is by opening a PDF document you would like signed.</li> </ol>	
<p><b>Create the Signature</b></p> <ol style="list-style-type: none"> <li>Tap on the document where you want to add a signature. Click 'Sign'.</li> </ol>	
<p><b>Create the Signature</b></p> <ol style="list-style-type: none"> <li>In the Sign window you have three options: <ul style="list-style-type: none"> <li>Draw – your name on your touch screen</li> <li>Image – upload an image of your signature</li> <li>Camera – take a picture of your signature</li> </ul> </li> <li>If using the camera, you will be asked permission for the App to access your camera, say 'Yes'.</li> <li>Follow prompts</li> <li>You have a choice to save the signature, which you can reuse</li> </ol>	
<p><b>Add the signature to a PDF document</b></p> <ol style="list-style-type: none"> <li>Open the document in Acrobat Reader</li> <li>Tap on the screen and hold</li> <li>Click Sign</li> <li>Move the signature to the desired location on the document, and resize as desired</li> <li>Save the PDF document, the signature is now embedded.</li> </ol>	



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

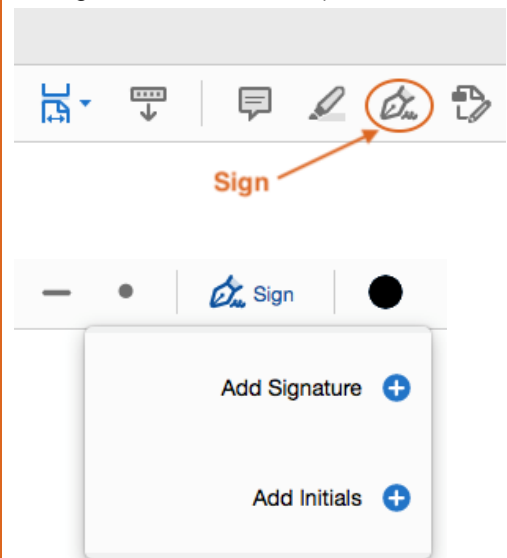
**Prescriptions:** A **real-time** digital signature on the prescription created with a mouse or stylus is required. An electronic signature (single, stored image) is not considered unique and cannot be used.

### Create a signature using Acrobat Reader

Using Adobe Acrobat Reader, you can add a signature to your document.

- Acrobat Reader is a free download (<https://get.adobe.com/reader/>). Note: You do not need to register an account with Adobe.
1. 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 or stylus on a signature pad
    - 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)



### 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

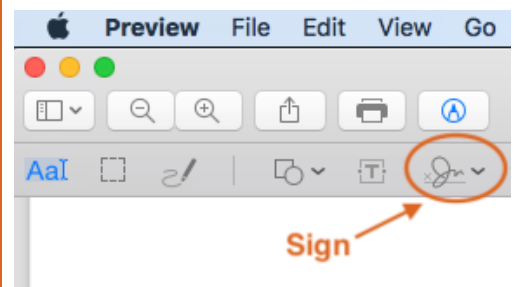
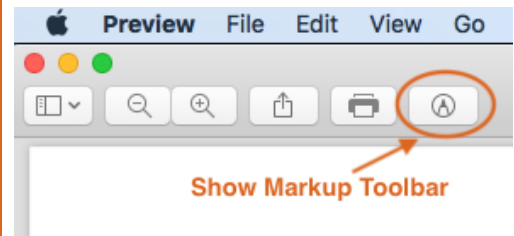
## Mac: How to sign a document – using Preview

**Prescriptions:** A **real-time** digital signature on the prescription created with a mouse or stylus is required. An electronic signature (single, stored image) is not considered unique and cannot be used.

### Create a signature using Preview on a Mac

Using Preview, you can add a signature to your document.

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



### Add the signature to a PDF document

8. 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
9. Save the PDF document, the signature is now embedded


## 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 #  

SAVE TO ADDRESS BOOK

Reference # (Optional):

# of Retries

Include Cover Page

Select Cover Page

To Name

Organization

From

Subject

Comments

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

**Send a Fax** 

**Add Recipient(s)**  Choose From Contacts

Name	Canada
Company Name	1 

**Add**  **Remove** 

**Recipient List (Maximum 50):**

**Include Cover Page**

---

Subject



Message


---

**Attachments**  No file chosen

You can add up to 10 documents or up to 18MB (Supported File Types)

---

Reference ID:     Fine (Better Quality)

**Send Fax** 

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](mailto:DTOinfo@doctorsofbc.ca) 🌐 [www.doctorsofbc.ca/doctors-technology-office](http://www.doctorsofbc.ca/doctors-technology-office)