

Faxing Guide

This guide will help you to understand how to set up and use faxing at Ambiki! If you have any questions about any part of this process please feel free to submit a support message.

Topics:

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[I don't see the Organization Admin Menu](#)

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[Connecting a Fax to a Patient](#)

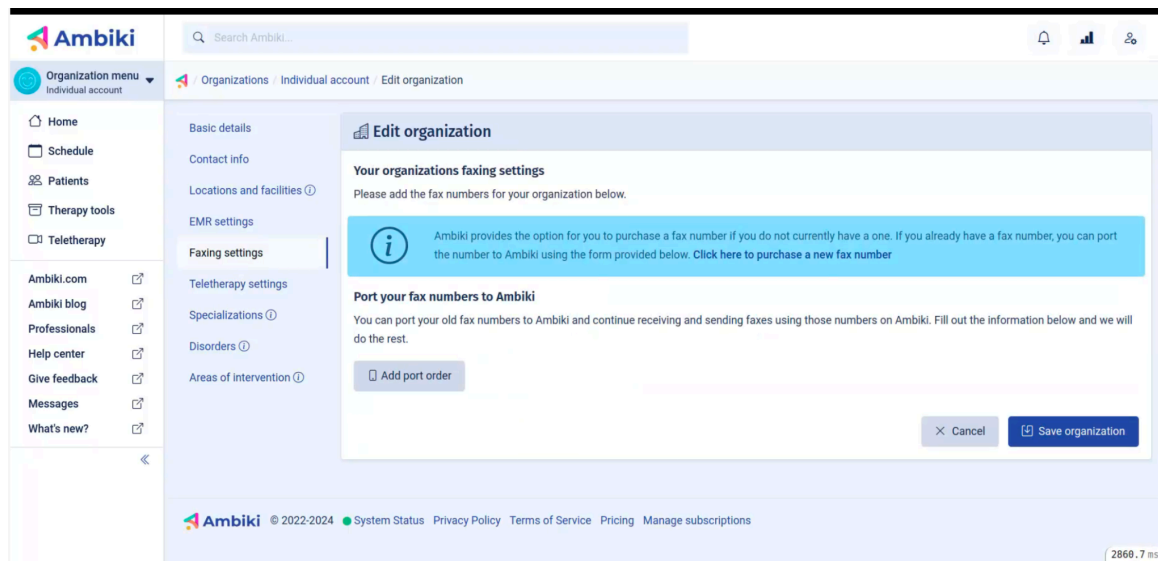
[Where do I see my faxes?](#)

[Where can I find my fax number?](#)

Getting a phone number through Ambiki

Ambiki provides the opportunity to purchase a fax number through them. It costs about \$2 and customer is able to fax immediately

That can be found under **Organization Menu > Edit Organization > Faxing Settings > Click here to purchase a new fax number (Image 1)**



You will then be directed to choose an area code (**Image 2**)

Basic details

Contact info

Locations and facilities ⓘ

EMR settings

Faxing settings

Teletherapy settings

Specializations ⓘ

Disorders ⓘ

Areas of intervention ⓘ

Your organizations faxing settings

Please add the fax numbers for your organization below.

Area code (choose a city closest to you) *

(503) Beaver, Gresham, Portland, OR

× Remove number

Port your fax numbers to Ambiki

You can port your old fax numbers to Ambiki and continue receiving and sending faxes using those numbers on Ambiki. Fill out the information below and we will do the rest.

[Add port order](#)

[Cancel](#) [Save organization](#)

Ambiki © 2022-2024 [System Status](#) [Privacy Policy](#) [Terms of Service](#) [Pricing](#) [Manage subscriptions](#) 2869.7 ms

Once you choose an area code click **Save Organization** and a new phone number will be provided for you on the new page load.

You can find this number under **Organization Menu > Edit Organization > Faxing Settings > Fax Number (Image 3)**

Organization menu

Ambitious Idea Labs (...)

Home

Schedule

Caseloads

Patients

Billing

Therapy tools

Teletherapy *beta*

Ambiki.com

Ambiki blog

Professionals

Help center

Give feedback

Messages

What's new?

Search Ambiki...

Organizations / Ambitious Idea Labs (Ambiki) / Edit organization

Edit organization

Faxing settings

Port your existing fax numbers to Ambiki

Use this option to port your existing fax numbers to Ambiki and continue receiving and sending faxes using those numbers. After submitting your information, faxing in Ambiki will be available for use in 2-4 weeks.

[Add port order](#)

Purchase new fax number

Use this option to set up a new fax number for \$2.00. After submitting your information, faxing will be available for use within 5 minutes.

Purchase request

Area code - 901 *

(901) Memphis, TN

Fax Number *

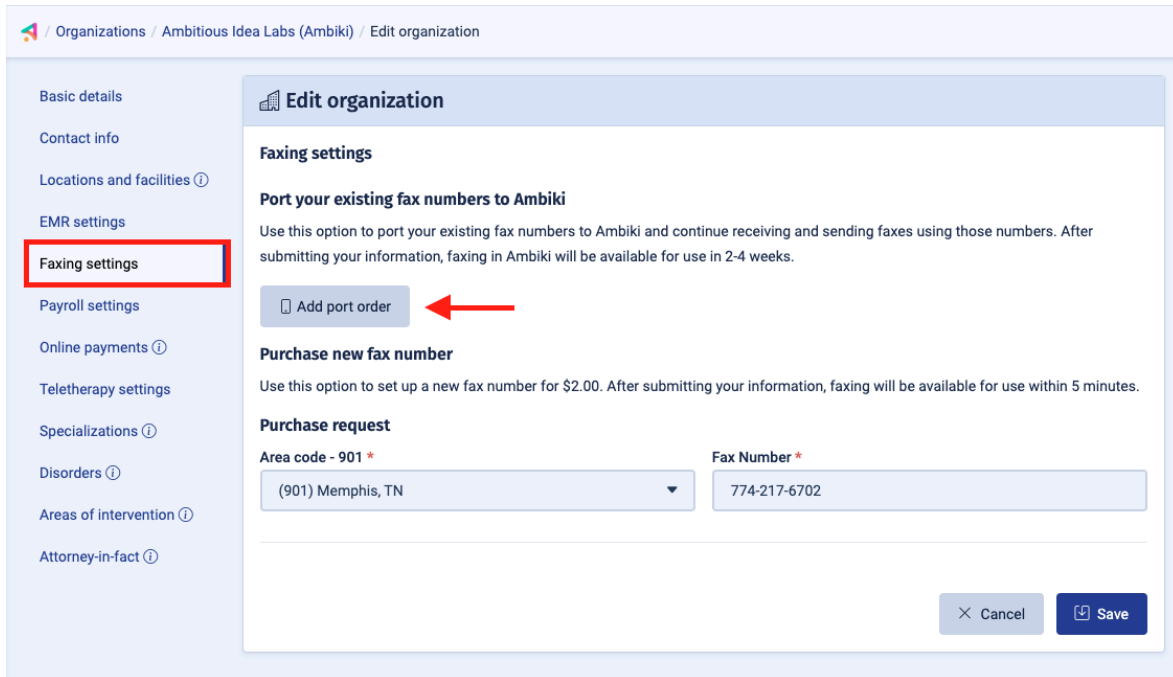
774-217-6702

[Cancel](#) [Save](#)

Ambiki © 2022-2024 [System Status](#) [Privacy Policy](#) [Terms of Service](#) [Pricing](#) [Manage subscriptions](#) 2869.7 ms

Porting a phone number

Porting in a number is started by filling out a form on Ambiki through the **Fax Settings > Add Port Order**. (Image 4)



The screenshot shows the 'Edit organization' page with a sidebar on the left containing various settings categories. The 'Faxing settings' category is highlighted with a red box. The main content area is titled 'Edit organization' and contains sections for 'Faxing settings', 'Port your existing fax numbers to Ambiki', 'Purchase new fax number', and 'Purchase request'. The 'Add port order' button is highlighted with a red arrow.

Organizations / Ambitious Idea Labs (Ambiki) / Edit organization

Edit organization

Faxing settings

Port your existing fax numbers to Ambiki

Use this option to port your existing fax numbers to Ambiki and continue receiving and sending faxes using those numbers. After submitting your information, faxing in Ambiki will be available for use in 2-4 weeks.

Add port order

Purchase new fax number

Use this option to set up a new fax number for \$2.00. After submitting your information, faxing will be available for use within 5 minutes.

Purchase request

Area code - 901 *

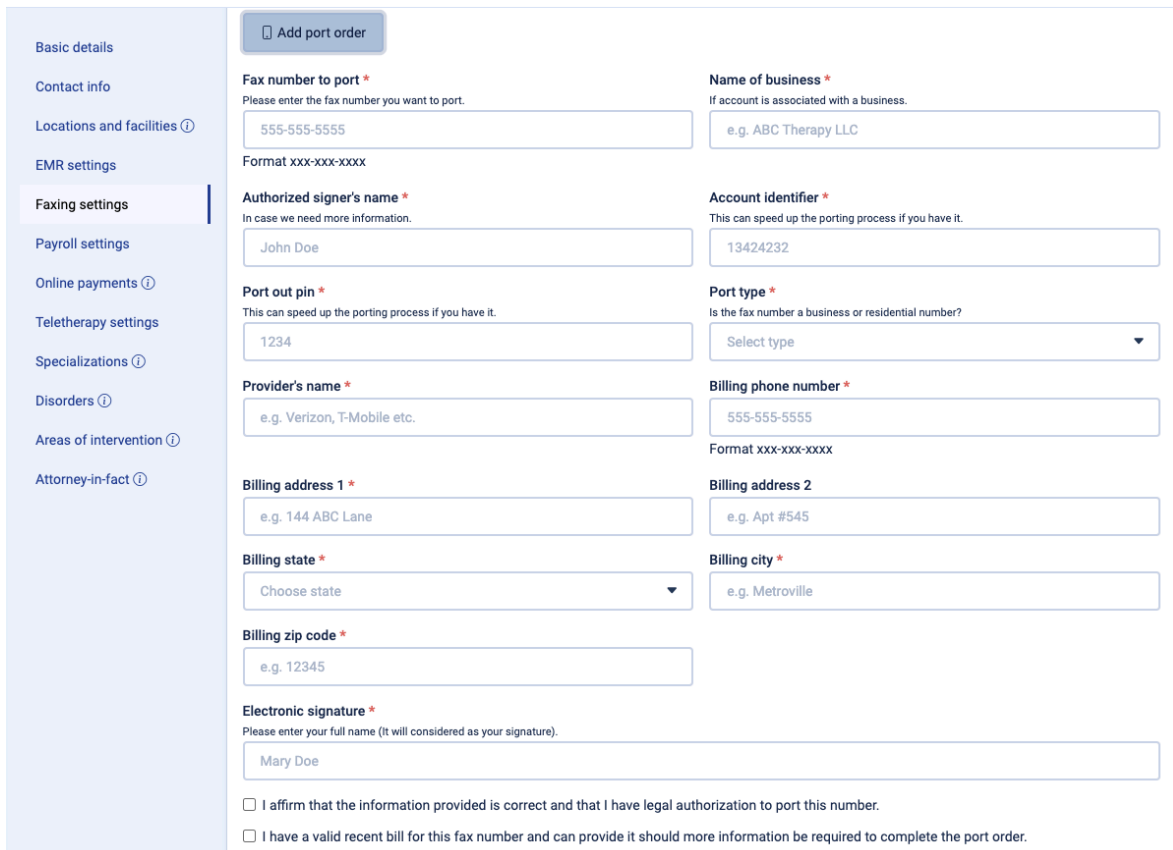
(901) Memphis, TN

Fax Number *

774-217-6702

Cancel **Save**

The form will look like this: (Image 5)



The screenshot shows the 'Add port order' form. The form contains various fields for entering information related to porting a fax number. The 'Faxing settings' category is highlighted in the sidebar.

Add port order

Fax number to port *

Please enter the fax number you want to port.

555-555-5555

Format xxx-xxx-xxxx

Name of business *

If account is associated with a business.

e.g. ABC Therapy LLC

Authorized signer's name *

In case we need more information.

John Doe

Account identifier *

This can speed up the porting process if you have it.

13424232

Port out pin *

This can speed up the porting process if you have it.

1234

Port type *

Is the fax number a business or residential number?

Select type

Provider's name *

e.g. Verizon, T-Mobile etc.

Billing phone number *

555-555-5555

Format xxx-xxx-xxxx

Billing address 1 *

e.g. 144 ABC Lane

Billing address 2

e.g. Apt #545

Billing state *

Choose state

Billing city *

e.g. Metroville

Billing zip code *

e.g. 12345

Electronic signature *

Please enter your full name (it will be considered as your signature).

Mary Doe

☐ I affirm that the information provided is correct and that I have legal authorization to port this number.

☐ I have a valid recent bill for this fax number and can provide it should more information be required to complete the port order.

Once that form is completed be sure to click **Save** at the bottom. This begins the process of porting your number. We will reach out to you if we need any further information.

At this point it is just waiting for your current phone carrier to complete the transfer. **This can take a few days to several weeks.**

Once we have been contacted by your current provider and have finished setting up your number in our system we will contact you to let you know your number has been successfully ported!

Phone number set up, what's next?

Before faxing you need to ensure you have a practice directory setup along with appropriate fax numbers.

You also need to enable faxing through your subscriptions page allowing your clinic to send faxes and authorizing the charge to your account. **(Image 6)**

Dashboard Manage user plans & add-ons **Manage organization add-ons** Past invoices Usage metrics

Organization Add-ons

☐ Tenalog™ add-on (\$1.00 per session)

☒ Faxing add-on (\$0.08 per page for incoming and outgoing faxes)

\$ Optional Optional: Set a maximum monthly spending limit ⓘ

⚠ You need to setup faxing before you can make use of the faxing add-on. Please visit this link to setup your faxing. [Faxing info](#)

☒ Insurance billing add-on (\$0.25 per EDI 837P claim)

\$ Optional Optional: Set a maximum monthly spending limit ⓘ

⚠ You need to setup insurance billing before you can make use of the insurance billing add-on. Please visit this guide on how to setup your insurance billing. [Insurance billing and claims info](#)

[Update Add-ons](#)

How to fax

There are 2 ways to fax a document. From the physician order tab under a patient and through the fax directory under the organization menu.

Option 1: Physician Order Tab:

In a physician order under **Actions -> Fax**. (Image 7)

Physician order - Initial diagnosis codes

Active: Expires in 3 months

Practice name

Practice address

Practice phone number

Test

N/A

N/A

Practice fax numbers

Provider

774-217-6702, 555-555-5555

BAILEY MORGAN (1992161616)

Patient

Patient DOB

Patient sex

Betty Boop

02/06/2020

Female

Start date

End date

Order requested by

05/14/2024

11/14/2024

Bethany Ayer

Model-Source-Setting

? - Multiple - ?

Disciplines

Speech Therapy (ST) - Evaluate and treat

Diagnosis codes

Diagnosis code

1

F80.0 - Speech Phonological / Articulation Disorder

Outgoing Faxes

Time sent:

To number

From number

Status

Responses

3 months ago

774-217-6702 (Ambitious Idea Labs (Ambiki))

774-217-6702 (Ambitious Idea Labs (Ambiki))

Success

IF: 05/14/2024 5:39AM

View

Download

Actions

Edit

Add alert

Print

Fax

Preview fax

Delete

Confirm fax number and **Send fax**. (Image 8)

Physician order - Initial diagnosis codes

Active: Expires in 3 months

Practice name

Practice address

Practice phone number

Test

N/A

N/A

Practice fax numbers

774-217-6702, 555-555-5555

Patient

Betty Boop

Start date

05/14/2024

Model-Source-Setting

? - Multiple - ?

Disciplines

Speech Therapy (ST) - Evaluate and

Diagnosis codes

Diagnosis code

1

F80.0 - Speech Phonological / Articulation Disorder

Send physician order

Fax number from *

774-217-6702 (Ambitious Idea Labs (Ambiki))

Fax number to *

774-217-6702

Close

Send fax

Once sent there is a log at the bottom of the page of all faxing related to this order. (Image 9)

Practice name	Practice address	Practice phone number
Test	N/A	N/A
Practice fax numbers	Provider	
774-217-6702, 555-555-5555	BAILEY MORGAN (1992161616)	
Patient	Patient DOB	Patient sex
Betty Boop	02/06/2020	Female
Start date	End date	Order requested by
05/14/2024	11/14/2024	Bethany Ayer
Model-Source-Setting		
? - Multiple - ?		
Disciplines		
Speech Therapy (ST) - Evaluate and treat		
Diagnosis codes		
Diagnosis code		
1	F80.0 - Speech Phonological / Articulation Disorder	

Outgoing Faxes

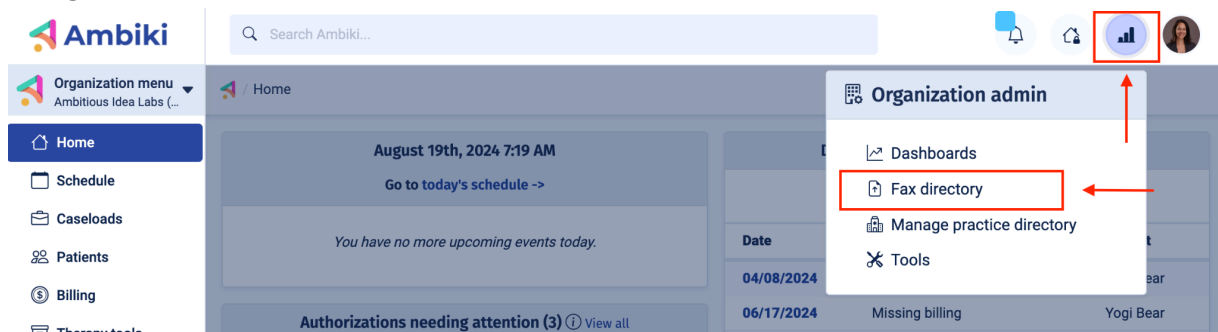
Time sent:	To number	From number	Status	Responses
3 months ago	774-217-6702 (Ambitious Idea Labs (Ambiki))	774-217-6702 (Ambitious Idea Labs (Ambiki))	Success	IF: 05/14/2024 5:39AM View Download

Incoming Faxes

Time received:	From number	To number	In response to
3 months ago	774-217-6702 (Ambitious Idea Labs (Ambiki))	774-217-6702 (Ambitious Idea Labs (Ambiki))	OF: 05/14/2024 5:38AM View Download

Option 2: Fax Directory:

The other way to fax is through the **Fax Directory** which is found under the **Org Admin Menu** (Image 10)



I can't see the Org Admin menu even though I have faxing permissions

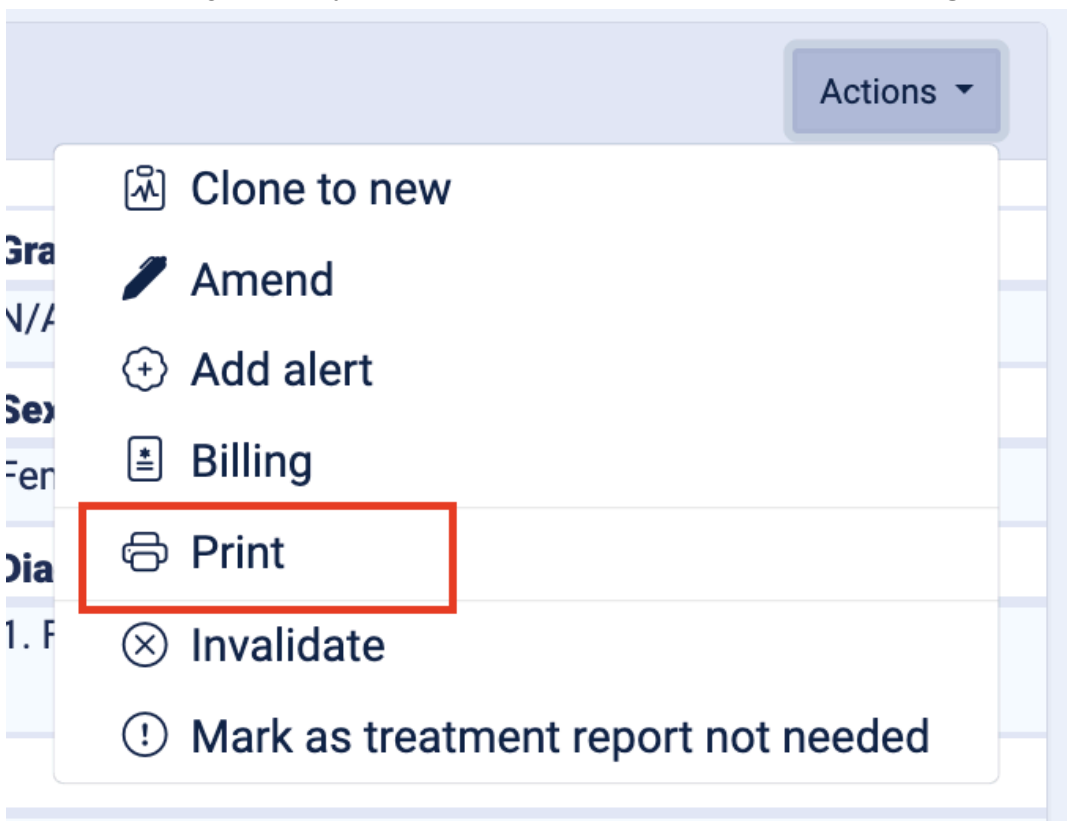
In order to access the faxing directory page you must have the **Organization Management** permission enabled. (Image 14)

Organizations	
Organization Management	User can Manage the Organizations profile and settings ®

Once you click on the Fax Directory you will be directed to a page that has all of the faxing information. You can see **Incoming Faxes**, view **Outgoing Faxes**, see the **Uploaded PDF's for faxing** and view **Blocked Contacts, and Cover Sheets**. (Image 11)



In order to fax a document that is not a Physician Order you must have that document as a PDF. We do provide the option to download a number of our clinical documents as PDFs. To get them you would go to the clinical document and then choose **Actions > Print**. You will then be directed to a page where you can download the document as a pdf. (Image 12)



To Fax you would choose **Fax a document** in the top right corner of [Image 11](#).

This will take you to the screen below where you fill out the fields, upload your PDF and choose **Save Fax Document (Image 13)**

Title *
Visit Note

Attention to
e.g. Jane Doe

Description
Please note: This field is for your internal reference only and does not appear on the actual fax document. Use it to add a brief description or notes related to this fax for your records.
Description of document to fax...

Cover sheet notes
Any notes that you would like to appear on the cover sheet of the fax, intended for the recipient.
e.g., Includes signed documents as requested. Please confirm receipt.

Faxed document (.pdf) (19 MB file size limit per document) *

Drop or Add File Here
or
Browse

Cancel Save fax document

You will be directed to another screen where you can choose **Actions > Fax (Image 14)**

Faxed document was successfully created

Uploaded PDF for faxing

Uploaded PDF for faxing		Actions
Title	Visit Note	Edit Download all files Fax Preview fax Delete
Description	N/A	
Attached files	Discharge (1).pdf	

Outgoing Faxes
There have been no faxes sent.

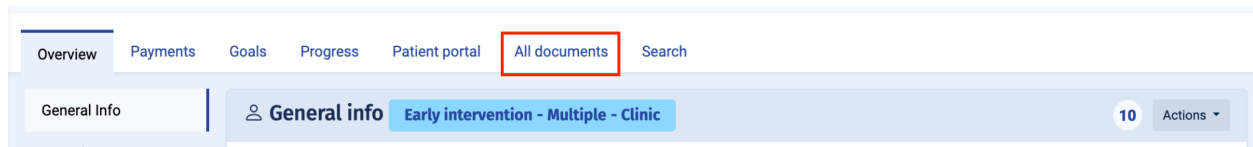
Incoming Faxes
There have been no received faxes.

Make sure you are faxing from your clinic and choose the appropriate number to send fax to and choose **Send Fax** as shown in [Image 8](#).

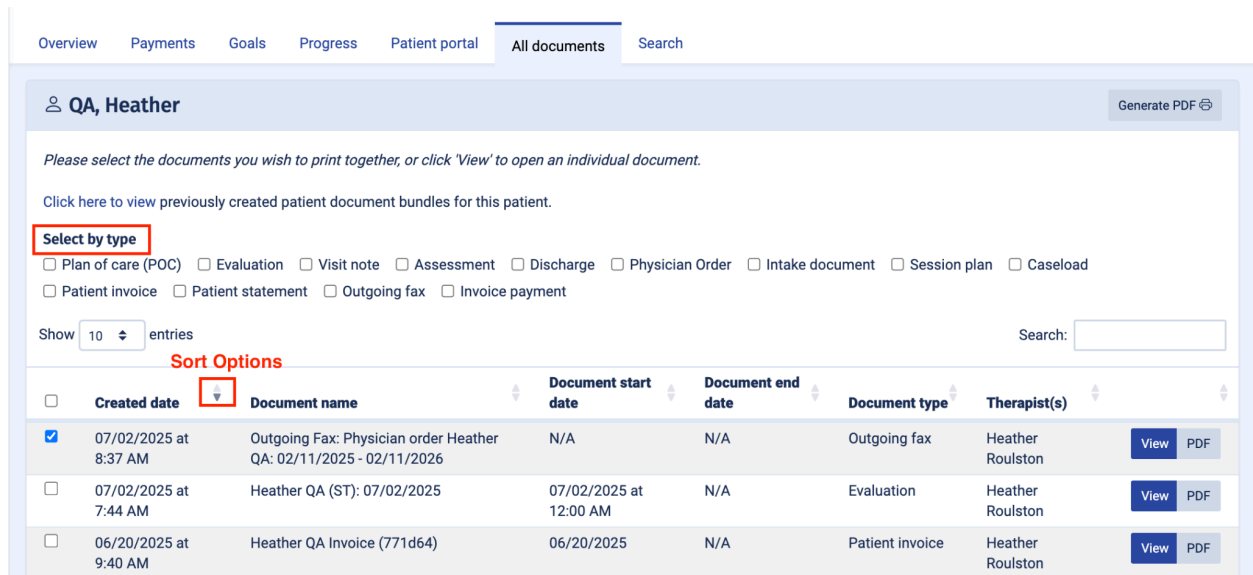
All of the faxes that have been **saved** but **not sent** will be found under the **Uploaded PDF's for faxing**. Within that tab you can **View** a saved fax and that will direct you to the screen shown in [Image 14](#). You can continue in the steps above to fax your document.

Faxing multiple documents

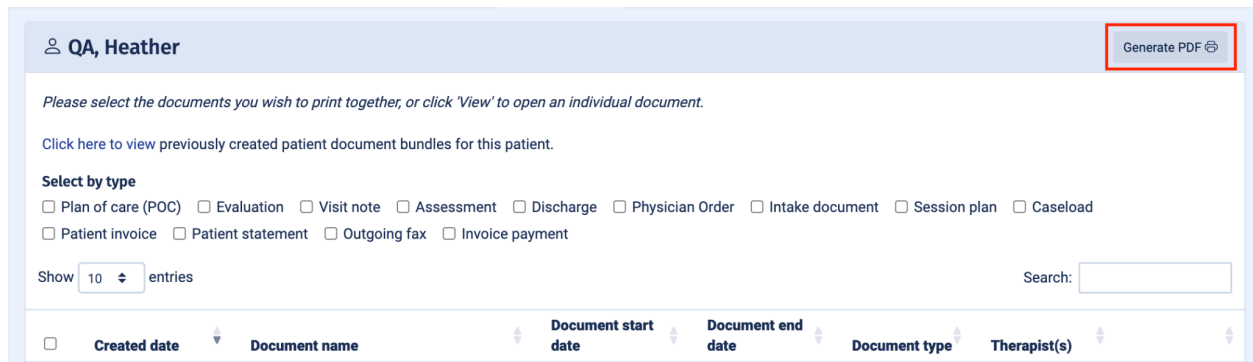
If you need to fax multiple documents from the same patient you would go to the **All Documents** tab on the patient profile. (**Image 15**)



You are able to select all of the same type of document or you can sort and select individual documents. (**Image 16**)



Once you have selected the options then you would click the button **Generate PDF**. (**Image 17**)



Once the PDF has been generated you can either download it or you can send the fax directly from this page. **(Image 18)**

The screenshot shows a 'Patient Document Bundle' interface. At the top, there's a header with a document icon and the title 'Patient Document Bundle'. To the right is an 'Actions' dropdown menu. Below the header, there's a 'View Combined PDF' button. The main content area is a table with four columns: 'Created date', 'User', 'Patient', and 'Documents'. The table contains one row of data. Below the table, there's a section titled 'Outgoing Faxes' with the text 'There have been no faxes sent.'

Created date	User	Patient	Documents
07/10/2025 12:20 PM	Heather Roulston	Heather QA	<ul style="list-style-type: none">Evaluation: 1Outgoing fax: 1Patient invoice: 1

Outgoing Faxes
There have been no faxes sent.

Cover Sheets

Custom Cover Sheet

To add a custom cover sheet to your fax you would go to the cover sheet tab and choose **Add Cover Sheet**. **(Image 19)**

The screenshot shows the 'Cover sheets for faxing' interface. At the top, there's a breadcrumb trail: 'Ambitious Idea Labs (Ambiki) / Cover sheets for faxing'. Below this is a navigation bar with tabs: 'Incoming faxes', 'Outgoing faxes', 'Uploaded PDFs for faxing', 'Blocked contacts', and 'Cover sheets'. The 'Cover sheets' tab is selected and highlighted with a red box. Below the navigation bar, there's a section titled 'Cover sheets for faxing'. To the right of this title is a button labeled '+ Add a cover sheet', which is also highlighted with a red box. Below the title bar, there's a search bar with the placeholder text 'Search cover sheets for faxing...'. To the right of the search bar is a 'Search' button and a 'Filters' dropdown. To the right of the search bar, it says '1 cover sheet'. Below the search bar, there's a table with three columns: 'Date added', 'Title', and 'Teammate'. The table contains one row of data. To the right of the table, there's a 'View' link with a right arrow.

Ambitious Idea Labs (Ambiki) / Cover sheets for faxing

Incoming faxes Outgoing faxes Uploaded PDFs for faxing Blocked contacts **Cover sheets**

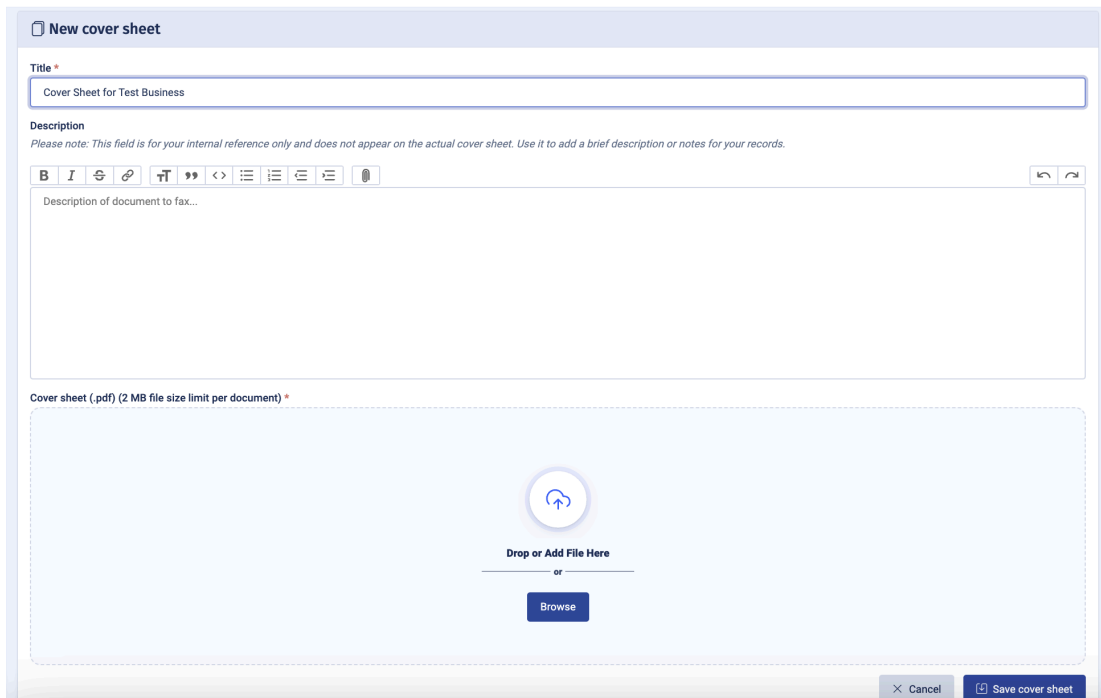
Cover sheets for faxing + Add a cover sheet

Search cover sheets for faxing... Search Filters 1 cover sheet

Date added	Title	Teammate
04/22/2025 at 10:38 AM	Cover sheet - Kaylee	Kaylee Janes

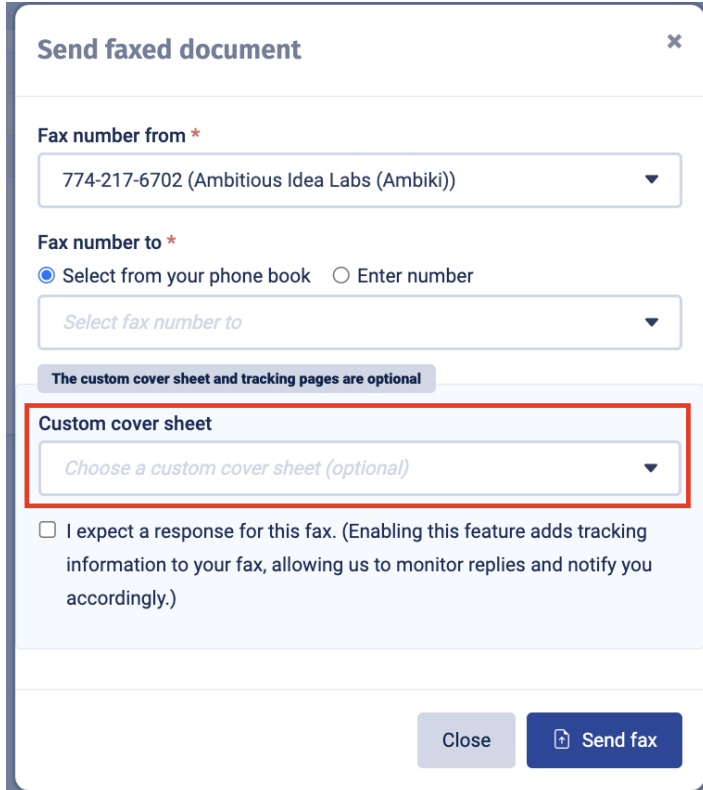
View →

You will then be directed to the next page where you can title your cover sheet and upload a custom pdf. Once completed choose **Save Cover Sheet** at the bottom. (Image 20)



The screenshot shows a web form titled "New cover sheet". It has a "Title *" field with the text "Cover Sheet for Test Business". Below it is a "Description" section with a note: "Please note: This field is for your internal reference only and does not appear on the actual cover sheet. Use it to add a brief description or notes for your records." There is a rich text editor with various formatting icons (bold, italic, link, etc.) and a large text area containing the placeholder text "Description of document to fax...". Below the text area is a file upload section labeled "Cover sheet (.pdf) (2 MB file size limit per document) *". It features a circular icon with a cloud and an upward arrow, the text "Drop or Add File Here", and a "Browse" button. At the bottom right, there are "Cancel" and "Save cover sheet" buttons.

To add the cover sheet to your faxed document you would go to **Actions > Fax Document** as shown in [Image 14](#) and in the modal you will see the option to choose a cover sheet from the drop down. (Image 21)




The screenshot shows a modal window titled "Send faxed document" with a close button (X) in the top right corner. It contains several fields: "Fax number from *" with a dropdown menu showing "774-217-6702 (Ambitious Idea Labs (Ambiki))"; "Fax number to *" with radio buttons for "Select from your phone book" (selected) and "Enter number", followed by a dropdown menu showing "Select fax number to"; a note "The custom cover sheet and tracking pages are optional"; a "Custom cover sheet" dropdown menu with the text "Choose a custom cover sheet (optional)" (this section is highlighted with a red rectangle); and a checkbox "I expect a response for this fax. (Enabling this feature adds tracking information to your fax, allowing us to monitor replies and notify you accordingly.)". At the bottom, there are "Close" and "Send fax" buttons.

Ambiki ID Page

An Ambiki ID page will get attached to a fax when you have the box checked: *I expect a response*. This page can be used as a cover sheet and will have information that was typed in **Cover Sheet Notes** as seen in [Image 13](#). (Image 22)



Ambiki Faxed document: Faxing test with cover sheet Date: 11/01/2024	1421 W Mockingbird Ln, Dallas, TX 75247 Fax: 943-578-5866 Phone: 469-662-1964 kjanes@ambiki.com
--	--

 Fax identification data

Sent from	Ambiki
Notes	Testing Testing Testing
Notice	Please include this cover page with your return fax. It contains a barcode that will help us match your return fax with the original fax in our system.

CONFIDENTIAL AND PRIVILEGED

This fax and/or any accompanying pages contain confidential information. It is intended for use only by the specified recipient, who shall remain obligated to maintain the information in a safe, secure, and confidential manner. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution, or use of any of the information contained in or attached to this fax communication is strictly prohibited by state and federal law. If you receive this fax by mistake, please contact the sender directly by telephone and destroy the fax communication immediately.



Generated by Ambiki's EMR platform. Page 1 of 1

Connecting a Fax to a Patient

To connect an incoming fax to a patient, you would choose the fax and click **View**. From there you would click **Actions > Edit**. This will take you to another page where you can choose what kind of document the fax is and which patient you would like it linked to.



The screenshot shows a web interface for editing an incoming fax. At the top, there is a header bar with a document icon and the text "Edit Incoming Fax: Unknown document". Below this, there are two dropdown menus. The first dropdown is labeled "What type of document is this? *" and the second is labeled "Select patient". Both dropdowns are currently empty, showing only a downward arrow.

***Note:** When you choose the box *I expect a response* then you **will not** have the option to link this to a patient as the fax will already be linked to another document.

Where to see received faxes

Physician Order Faxes

Information that is received can be found at the bottom of the physician order See [Image 9](#)

Fax Directory

Information that is received can be found at the bottom of the individually faxed document.

In addition all incoming faxes can be found under the **Incoming Faxes** tab shown in [Image 11](#)

Where to find my fax number

The fax number can currently be found under **Organization Menu > Edit Organization > Faxing Settings** as shown in [Image 3](#)