

Secure Text User Guide



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How to use Updox SMS and Secure Text

[A quick guide to get your practice using SMS and Secure Text today](#)

1. After logging in to your Updox account, click the Text Message button in the menu line of the Updox inbox.

The screenshot shows the Updox inbox interface. At the top left, there is a 'Menu' button with a hamburger icon. The Updox logo is centered at the top. Below the logo, there is a navigation bar with several buttons: a search icon, a refresh icon, 'ADDRESS BOOK', 'COMPOSE', 'TEXT MESSAGE' (highlighted with a blue border), and 'VIDEO CHAT'. On the left side, there is a vertical sidebar with icons for 'Inbox', 'Sent', 'Archive', 'Spam', 'Trash', and 'System'. The main area displays a list of messages. Each message row includes a checkbox, a right-pointing arrow, the message type (e.g., 'message', 'fax', 'email', 'form'), the date and time, and the message content. The 'TEXT MESSAGE' button in the navigation bar is highlighted with a blue border.

Message Type	Date and Time	Message Content
message	Fri 03/10/23 10:54 AM	READ: Test
message	Fri 03/10/23 10:54 AM	READ: dawdawd
message	Fri 03/10/23 10:54 AM	READ: maybe the last test
fax	Thu 03/09/23 11:08 PM	2 fax pages from (614) 807-9017
message	Thu 03/09/23 3:24 PM	READ: This is a test to read
message	Thu 03/09/23 3:23 PM	READ: Test
message	Thu 03/09/23 3:06 PM	re:Test message
message	Thu 03/09/23 3:06 PM	READ: Test message
fax	Thu 03/09/23 10:15 AM	1 fax page from (844) 464-0602
email	Wed 03/08/23 3:44 PM	Re: Hey
form	Wed 03/08/23 1:51 PM	Copy of Rate Us!
form	Wed 03/08/23 1:49 PM	Rate Us!
form	Wed 03/08/23 1:47 PM	Rate Us!

2. A Text Message window will open, and you will be able to select the option to send SMS or a Secure Text message. ***Content that contains PHI should be sent via Secure Text to ensure HIPAA compliance.**

Send a Text Message ✕

I want to send a Secure Text SMS Text [What's the difference?](#)

Send to *

Assign to a queue

Auto-sort incoming messages and responses with workflow queues [Learn More](#)

SMS text messaging is not a HIPAA-compliant method of communication.
Refrain from entering any PHI in the message contents.

Template

Form

Message * 0/140 characters

Discard

When sending a Secure Text message, you can choose the delivery method (SMS, email or both to notify the recipient they have a message. This allows the information to be accessed on a phone or computer.

Send a Text Message ✕

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Send to *

Patient recipients must have a date of birth and either a cell phone or an email saved in the Address Book.
Contact recipients must have first and last name and either a cell phone or an email saved in the Address Book.

Notify method * SMS Email [What's the difference?](#)

Assign to a queue

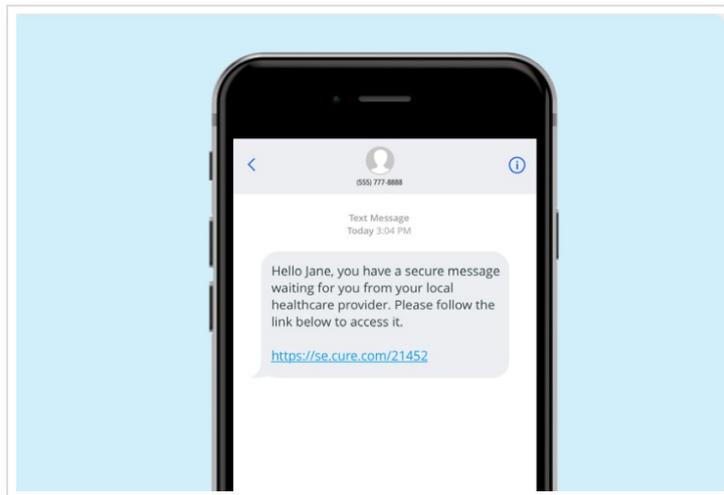
Auto-sort incoming messages and responses with workflow queues [Learn More](#)

3. Search for the recipient or contact by typing in the name or phone number, or simply type the recipient's phone number for SMS. For Secure Text, recipients must have a phone number and date of birth saved in the Upxox Address Book.

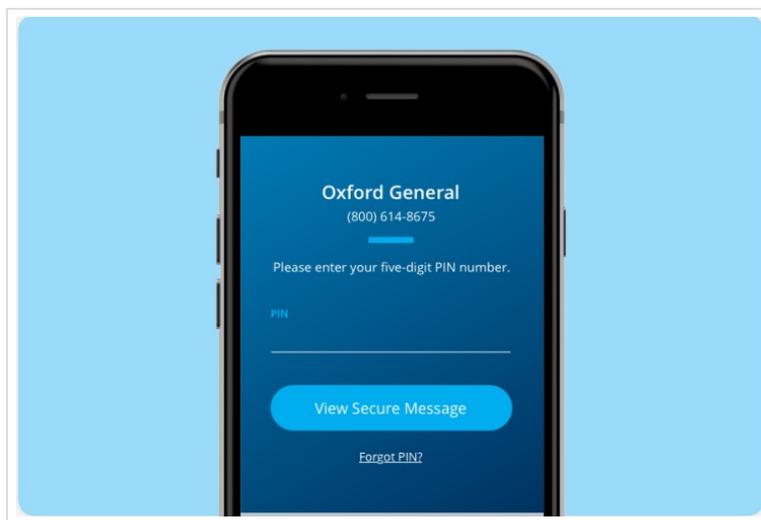
4. Enter the text message content. For the message content, you can choose a template or type the message for both SMS and Secure Text. For Secure Text, there is a standard greeting message that the recipient will receive. *You have a secure message waiting for you from your medical provider. Please follow the link to log in.*

When sending a secure text you can allow the recipient the ability to respond or not by checking or unchecking the box at the bottom of the text screen **Allow Responses** (Checked by default).

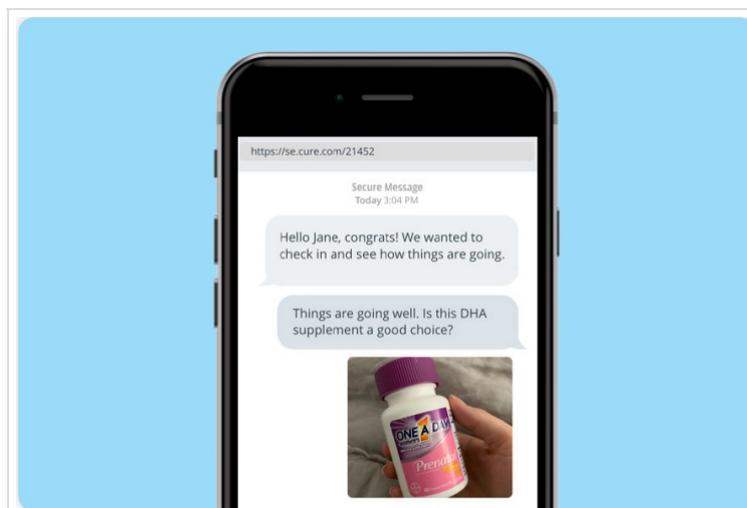
5. For SMS, the recipient or contact receives a standard text message. For Secure Text, your recipient receives the standard greeting message and link. For both, the phone number will be the practice number.



6. For Secure Text, the link is active for 72 hours. When the link is clicked, a browser will open and the recipient will be asked to enter their date of birth and last name. Next, they will set up a 5-digit PIN they will use to view all future messages



7. Texting in the secure environment, after the information is entered, the recipient will be able to review the Secure Text. If a reply is requested, the recipient can enter a message, add files or photos



8. When the recipient replies, a new item will appear in the practice Inbox and their response will be added to the original message thread. You can also track the receipt of text messages and easily file conversations to the EMR.

Browser window showing an email interface at <https://myupdox.com/ui/html/index.html#/inbox>. The interface includes navigation tabs for ADDRESS BOOK, COMPOSE, and TEXT MESSAGE. The selected message is a text message from Gerlach Family Pediatrics, dated Tue 07/24/18 11:30 AM, with the subject "SMS Response".

to: Gerlach Family Pediatrics
from: SMS (937) 248-8613

Buttons: SEND ITEM, COMMENT, ARCHIVE, OPTIONS, ACTIONS

SMS (937) 248-8613
(937) 248-8613: no contacts found with this phone number
Thanks, I'll see you at my next check-in!

Gerlach Family Pediatrics
This supplement is a good choice. If you have any additional questions, let us know.

SMS (937) 248-8613
(937) 248-8613: no contacts found with this phone number
Things are going well. Is this DHA supplement a good choice?



Gerlach Family Pediatrics
Hello Jane, congrats! We wanted to check in and see how things are going.