

How To: Send a Broadcast Message




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The Updox Broadcast tool will allow you to send one-way messages to all or a select group of patients at once, using the following steps.


Step 1:

From the Updox Inbox, select **Menu - Home - Broadcast**. A prompt will ask what delivery method for the broadcast. For this example, **Text Broadcast** will be selected.


What method would you like to use to deliver your messages? ×




EMAIL BROADCAST



PORTAL BROADCAST



TELEPHONE BROADCAST



TEXT BROADCAST

Step 2:

There are 2 fields to first select:

1. 'Respect patients' communication method: This will respect any patients' communication method set in Updox (typically part of an EMR sync). Select 'Yes' from the dropdown to respect these methods.
2. Send to: There are a number of pre-populated lists of patients you can choose from in the drop-down, such as 'Yesterdays' appointments' for surveys and/or follow-up, 'Tomorrow's' Appointments' for office policy reminders, or 'All Patients'. You can also create your own Broadcast list under **Menu - Admin - Broadcast Configuration**.

Send a message to your patients via Text Message ✕

Messages sent using this broadcast feature will be sent ONLY to patients who already have cell phone numbers listed in the Address Book. Please restrict your messages to 140 characters.

BE ADVISED: Copying and pasting text from Microsoft Word (or any other word processor) will often yield undesirable results. This is due to special character formatting that is only readable in the word processor. It is best to type your message from within this message window.

Respect patients' communication method ⓘ

No

Filter by Appointment

Message 0/140 characters

Send To

-- None Selected --

Patients 44-333

No show Appointments

Patient portal

Test 2

Test 3

test list

Yesterday's Appointments

Last 7 Days' Appointments

Last 30 Days' Appointments

Today's Birthdays

This Week's Birthdays

Personalize the message.

— The patient's first name

— The practice name

— The practice phone number

Repeat will cause the same Broadcasts List and Message at the assigned interval. Repeating Broadcasts will be weekly Broadcasts will be sent on the same day of the week as the initial Broadcast. Monthly Broadcasts will be sent on the same day of the month.

[← Back to delivery options](#)

CLOSE SEND ✓

Step 3:

Either chose a pre-populated 'Message Template' or enter the text of your Broadcast in the 'Message' box. You can use the variables located to the right to personalize the message.

For example, a Broadcast may look like this:

Hi [firstname], Just a reminder from [practicename] to bring an updated version of your insurance and your driver's license to your appointment tomorrow.

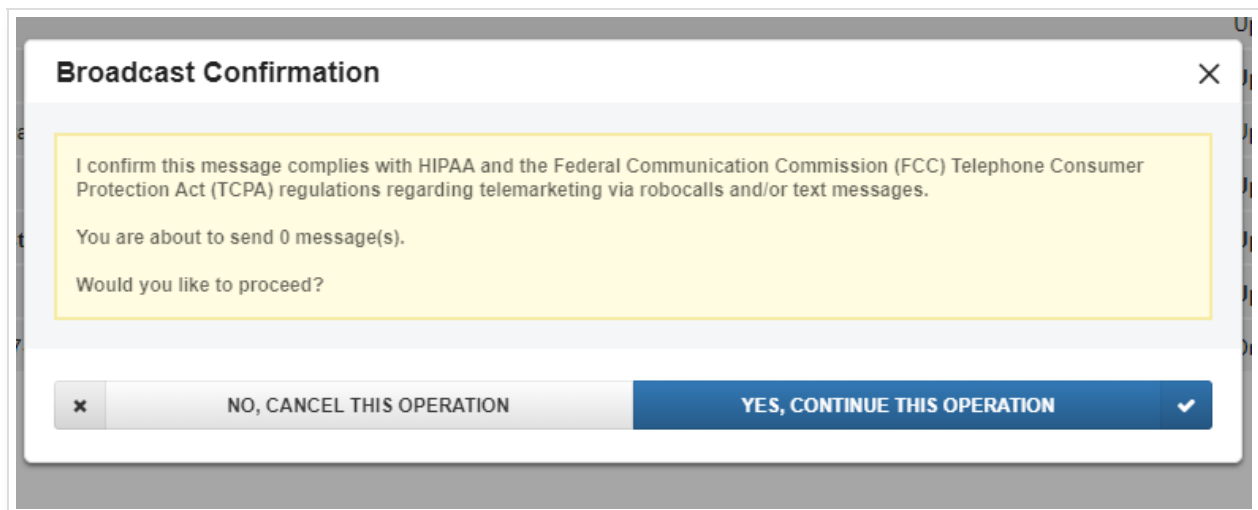
Tip: Broadcast message templates help save time for your team. You can create these by clicking on Menu - Admin - Broadcast Configuration, then 'Templates'. Click 'New' in the bottom right, choose the delivery method you'd like to create a template for, create your template, and click 'Save'.

Step 4:

There is an option to set a Broadcast to repeat automatically. A common example would be a message for patient's birthdays: Select 'This Week's Birthdays' from the 'Send To' list, draft the birthday message, then choose 'Weekly' under 'Set to Repeat'.

Step 5:

Click 'Send' to send the broadcast message. You will then receive this pop-up:



Once you have read the message, click "YES, CONTINUE THIS OPERATION" and the broadcast message will be sent.

Tip #1: Broadcast messages are not HIPAA compliant, so do not include any PHI information for the patients. To send a HIPAA-secure message, please use Updox Secure Text.

Tip #2: To view patient lists and the content of your message templates, navigate to **Menu - Admin - Broadcast Configuration**.