

How To: Send a Broadcast Message

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Sending a Broadcast Message

In **Menu > Home**, click **Broadcast**.

You'll land on the **Create** tab. Choose the communication method for your broadcast message - Text Message, Email, Telephone, or Portal.

The screenshot shows the 'Broadcast' page in the Updodx system. The top navigation bar includes 'Menu | updodx' and a user profile icon 'TD'. Below the navigation, there are tabs for 'Dashboard', 'Lists', 'Templates', and 'Reporting'. The main content area is titled 'Dashboard' and has sub-tabs for 'Create', 'Recurring', and 'Sent'. Under the 'Create' tab, there are four buttons for communication methods: 'Text Message' (selected), 'Email', 'Telephone', and 'Portal'. Below these buttons, the heading reads 'Send a message to your patients via Text Message' with 'Clear' and 'Send' buttons. The form includes three dropdown menus: 'Respect patients' communication method' (set to 'No'), 'Send to' (set to 'Select an option'), and 'Set to repeat' (set to 'No'). There is also a checkbox for 'Filter by Appointment'. A callout box on the right provides instructions on using variables: 'Use variables to personalize the message' with examples for '[practicename]' (The practice name) and '[practicephone]' (The practice phone number). At the bottom, there is a 'Message' text area and a 'Templates' dropdown menu.

Important information about sending Broadcast Text Messages

To adhere to the recently updated FCC regulations, all broadcast messages that are sent as a text message will be moving to a new standard format. This standard format will aid in the messaging verification process brought forward by carriers and will significantly decrease the likelihood of messages being filtered or blocked by carriers. The standard format that a recipient will see when they receive a broadcast message via SMS will be as follows:

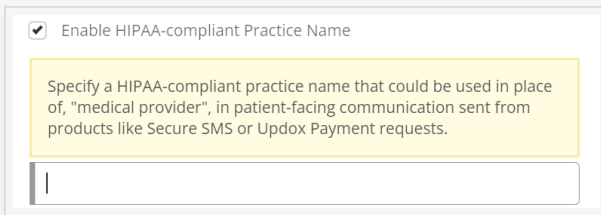
Standard SMS format: Hello [First Name], you have a new message from [HIPAA Safe Practice Name*] at [weblink]

Recipients can interact with the link in the text message to access the Broadcast message. The link will expire after 5 days.

NOTE: If you do not have a HIPAA-compliant Practice Name configured, your standard practice name will default in for the SMS message.

If your practice has its HIPAA-compliant Practice Name set in the Practice Settings of the Admin tab in the Updodx Inbox, that will be the practice name the recipient sees in the messages they receive from your

practice. If not, they will see your standard practice name. To set your HIPAA-safe name, in the Updox Inbox click on the **Menu > Admin > Practice Settings** scroll down to the checkbox next to **Enable HIPAA-compliant Practice Name** and click the checkbox. You can then enter your HIPAA-compliant practice name.



Enable HIPAA-compliant Practice Name

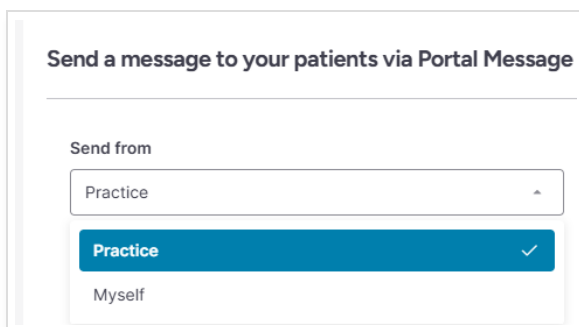
Specify a HIPAA-compliant practice name that could be used in place of, "medical provider", in patient-facing communication sent from products like Secure SMS or Updox Payment requests.

Any existing broadcast message scripts sent via SMS that contain the [FirstName] variable will be replaced by "Recipient" within the content of the message behind the weblink to maintain HIPAA compliance. This will not apply to any broadcast messages sent via email, portal, or voice.

Existing configurations that your practice has for any broadcast messages will remain in place, and your practice will not be required to make any changes as the existing content will now simply be shown via the web application versus within the text message directly. Once again, this will aid in the newly required registration process and with message deliverability.

Select the appropriate values from the dropdowns. Dropdowns may vary based on your chosen communication method.

- **Respect patients' communication method:** **Yes** will respect any patients' communication method set in Updox (typically part of an EMR sync). Applicable to Text, Email and Telephone methods.
- **Send from:** For Portal messages only, you can choose if you want the message sent from the **Practice** or **Myself**. Choosing **Practice** will show the practice name as the sender of the message, while **Myself** will show the first and last name of the user sending the message. By default, the message will send from the **Practice**.



Send a message to your patients via Portal Message

Send from

Practice

Practice ✓

Myself

- **Send to:** Choose who you want to send your message to. By default, Updox provides several pre-built lists like "Appointments in the last 7 days" or "Today's Birthdays". If you would like to create a custom list of recipients, click on the **Lists** tab. You can read more about creating lists here - [Broadcast Lists](#). Applicable to Text, Email, Telephone, and Portal methods.
- **Set to repeat:** If you want your message to send to recipients on a regular basis, choose a delivery interval (**Daily**, **Weekly**, or **Monthly**) from the dropdown. If you just want to send the message one time, select **No**. Applicable to Text, Email and Telephone methods.

Set to repeat

No

No ✓

Daily
Will be sent out everyday at 9AM

Weekly
Will be sent every Monday at 9AM

Monthly
Will be sent on the first Monday at 9AM every month

- **Filter by Appointment:** You can further refine your "Send to" list with additional filter options by selecting ranges of appointment dates, appointment types, and appointment calendar.
- **Filter by Age:** You can further refine your "Send to" list with additional filter options by selecting ranges of ages. There are multiple options for selecting a range of months or years.

Note: Filters do not apply to repeating broadcast messages. Also, some filters may not be available to all accounts. If we do not retrieve your appointment data, you will not be able to filter by appointments.

Now start typing your broadcast message. You can personalize it by using variables, like your practice's name or phone number. Alternatively, you can choose a pre-populated template. Templates help you save time when writing Broadcast messages. Read more here - [Broadcast Templates](#).

Message * ⓘ Templates ▾

Flu shots available now!
Contact [practicename] at [practicephone] to schedule an appointment.

When you are done personalizing your message, click **Send** to send the broadcast message, and confirm the pop up that appears.

Send Broadcast Text Message ✕

I confirm this message complies with HIPAA and the Federal Communication Commission (FCC) Telephone Consumer Protection Act (TCPA) regulations regarding telemarketing via robocalls and/or text messages.

I understand that I cannot use Updox Broadcast to send targeted marketing or promotional messages. Failure to observe this policy is in violation of my Master Service Agreement and may result in Updox suspending or disabling access to Broadcast.

You are about to send 2 message(s). Would you like to proceed?

Cancel Continue

Please note that this pop up will not appear when sending Portal messages. The portal message will just be sent.

Tip: 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's Secure Text product.