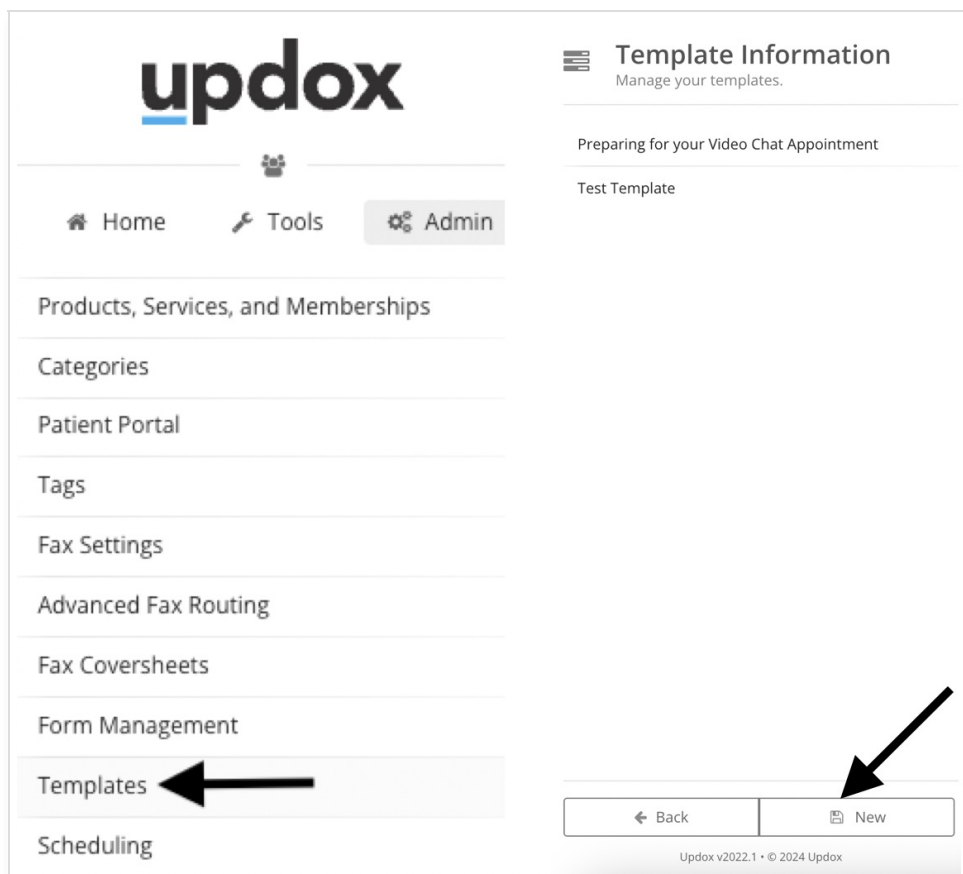


# Templates User Guide

Last Modified on 01/27/2025 3:31 pm EST

Templates are a great way to streamline common text and fax responses and standardize messaging for user efficiency.

After logging into your Updox account, choose **Menu > Admin > Templates**. Click **New** at the bottom of the panel to start a new template.



Title your template and create the written content. When you are ready for your users to access this template, ensure **Active** is checked, and click **Save**.

## Edit Template

Update your template.

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**Title**

Preparing for you Video Chat Appointment

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Please review this guide before your scheduled video visit.  
<https://help.updox.com/help/video-chat-participant-guide>

This template is available for use in SMS and Secure Text messages, since it is less than 140 characters (currently at 120 characters).

Templates can be used when sending a text or a fax. Users can choose from the template dropdown for efficient responses.

**Send a Text Message** ✕

I want to send a  Secure Text  SMS Text What's the difference?

Send to \*

Patients registrars must have a date of birth and either a cell phone or an email saved in the Address Book. Contact registrars 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](#)

Greeting You have a secure message waiting for you from Family Medical Associates. Please follow the link to login.

Template

Form

Attachments

Secure message \*

Allow responses

Discard Send Secure Text

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

Template

Form

Message \*

Discard Send SMS Text

Sending Provider

Fax Coversheet

Address To  Individual  Business  Both

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TEMPLATES
FORMS
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Message

Preparing for your Video Chat Appointment

Text Template