How to: Creating Broadcast Patient Lists



Last Modified on 07/12/2022 3:17 pm EDT

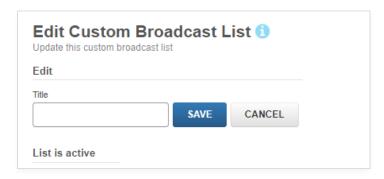
For specific Broadcast messages, you can create a custom patient list that will be available when sending to patients.

Step 1:

From within the Updox inbox choose **Menu - Admin - Broadcast Configuration**, click on 'Lists' then 'New' in the bottom right hand corner.

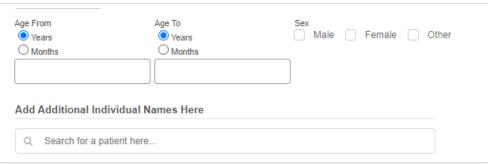
Step 2:

Name the patient list, and click 'Save'.

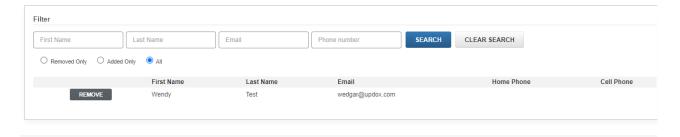


Step 3:

Choose the criteria needed to filter your patients.



- Age: Patients can be filtered by age, in both years and month. This will be calculated based on the DOB in the patient's record
- Sex: Lists can be created based on the patient's sex.
- Add Additional: If you have a specific list of patients' names, you can search for each patient to add to your custom list
- **Filter:** Enter patient information to see if they are in the list based on your criteria. You can remove a patient by clicking 'Remove'.



Step 4:

Once you have the list created, close the window with the 'X' in the upper right hand corner. The list will appear as 'Active' in the menu bar. If you need to edit the list, double-click to make changes.