

How to: Creating Broadcast Patient Lists



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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'.

Edit Custom Broadcast List ⓘ
Update this custom broadcast list

Edit

Title

SAVE **CANCEL**

List is active

Step 3:

Choose the criteria needed to filter your patients.

Age From

Years

Months

Age To

Years

Months

Sex

Male Female Other

Add Additional Individual Names Here

- **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'.

Filter

First Name Last Name Email Phone number **SEARCH** CLEAR SEARCH

Removed Only Added Only All

	First Name	Last Name	Email	Home Phone	Cell Phone
REMOVE	Wendy	Test	wedgar@updox.com		

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.