How To: Change to a HIPAA-safe Practice Name for Secure Text, Broadcast, and Updox Payments

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Great News! Set up your HIPAA-safe practice name to identify your office in the **Secure SMS message, Updox Payments, and Broadcast messages.**

Updating this field will allow you to greet your patients and identify who you are without being specific in the type of medical practice.

The "from" name is limited to 99 characters and must be set by any Updox Admin.

- 1. Go to: Menu > Admin > Practice Settings
- 2. Check the box for **Enable HIPAA-Compliant Practice Name** and type in the name you want to be displayed.

Practice Timezone				
Show inactive patients/contacts when searching				
Forward incoming faxes to one or more email addresses.				
 Keep forwarded faxes in Updox 				
Automatically retrieve confirmation pages for sent faxes				
 Allow sending outbound faxes from queues 				
 Allow non-admins to block incoming fax numbers 				
Enable Relate to Patient work flow				
Automatically save incoming faxes to disk (Updox Central)				
Autosave as a PDF 👻				
Manually download messages and items as: PDF 🕶				
 Do not add last page of metadata on PDFs or imported documents 				
Send email replies to a non-Updox email address				
Enable displaying a custom fax from number				
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.				
Family Medical Associates				
🗲 Back 🖺 Save				
Updox v2022.1 + © 2023 Updox				

- 3. Once your changes are made, click **Save** and your secure text will now display the name you entered.
- 4. To see the change, go to the secure message screen and review under **Greeting**.

Send a Text Messa	ge	×	
l want to send a	 Secure Text SMS Text 	What's the difference?	
Send to *	Search by name, type number, or email	×	
	Patient recipients must have a date of birth and either a cell phone or an email saved in the Address Book. Contact recipients must have first and last name and either a cell phone or an email saved in the Address Boo		
Notify method *	SMS Email	What's the difference?	
Assign to a queue	Select 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 log in.		
Template	Insert a message template	•	
Form	Insert a form URL	•	
Attachment(s)	Add attachment	0/4000 characters	
Secure message *	Type message		
		 Allow responses 	
	Discard	🖰 Send Secure Text	

Below you can see an example of a Secure Text sent with and without the HIPAA-compliant Practic Name.



When sending a Broadcast text message the HIPAA Safe Practice Name will be used.

end a message to your	patients via Text Message	
Messages sent using this broadca at [weblink]".	ast feature will initially send the following standard	message: "Hello [First Name], you have a new message from [HIPAA Safe Practice Name]
Upon selecting the weblink, the r	recipient will be taken directly to a page displaying t	the broadcast message input below.
If a HIPAA Safe Practice Name ha	is not been set within Practice Settings, the full Prac	ctice Name will be used.
Messages sent using this broadca 140 characters.	ast feature will be sent ONLY to patients who alread	dy have cell phone numbers listed in the Address Book. Please restrict your messages to
BE ADVISED: Copying and pasting is only readable in the word proc	g text from Microsoft Word (or any other word pro essor. It is best to type your message from within t	cessor) will often yield undesirable results. This is due to special character formatting that :his message window.
espect patients' communication n	nethod 🕑 Send To	
No	 Test List 	*
Filter by Appointment		
	Message Template	Use variables to personalize the message.
	Message Template 🔹	• [practicename] — The practice name
Nessage 0/140 characters		[practicephone] — The practice phone number
		Set to Repeat
		Set to Repeat
Pack to delivery entires		Set to Repeat

** For More Information on Updox Payments, go to our Updox Payments section using the link below:

https://help.updox.com/help/updox-payments