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

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

Eastern ▾

☐ 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

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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**.

Below you can see an example of a Secure Text sent with and without the HIPAA-compliant Practic Name.
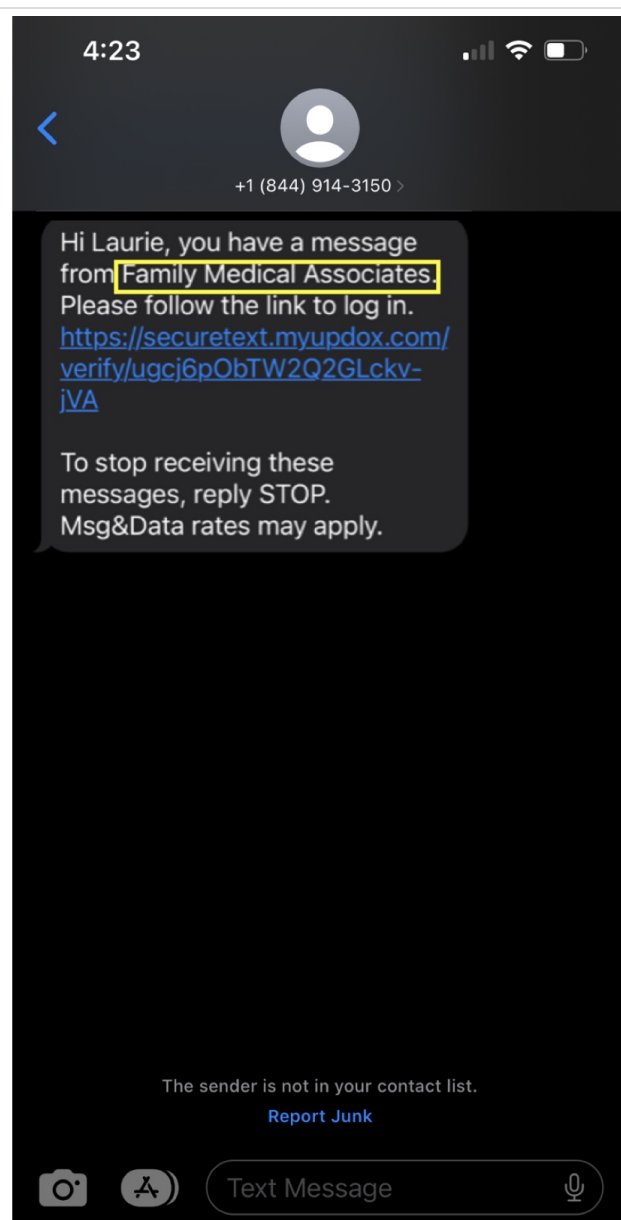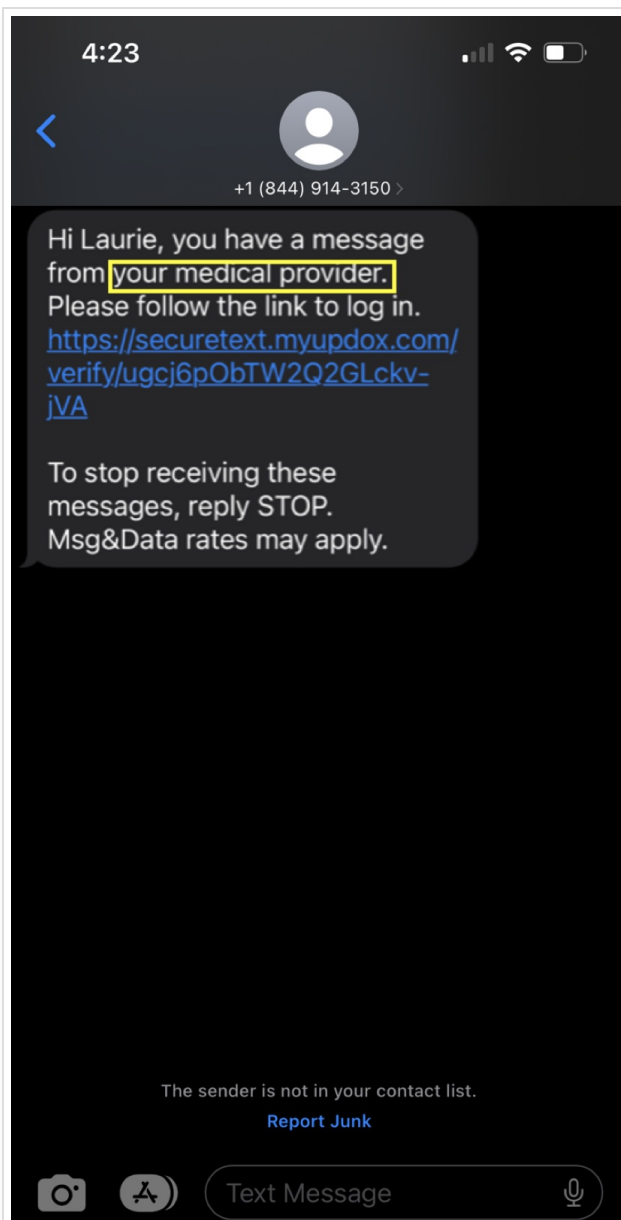
When sending a Broadcast text message the HIPAA Safe Practice Name will be used.

Send a message to your patients via Text Message   ✕

Messages sent using this broadcast feature will initially send the following standard message: "Hello [First Name], you have a new message from [HIPAA Safe Practice Name] at [weblink]".

Upon selecting the weblink, the recipient will be taken directly to a page displaying the broadcast message input below.

If a HIPAA Safe Practice Name has not been set within Practice Settings, the full Practice Name will be used.

Messages sent using this broadcast feature will be sent ONLY to patients who already have cell phone numbers listed in the Address Book. Please restrict your messages to 140 characters.

BE ADVISED: Copying and pasting text from Microsoft Word (or any other word processor) will often yield undesirable results. This is due to special character formatting that is only readable in the word processor. It is best to type your message from within this message window.

Respect patients' communication method ❓   Send To

| No ▾ | | Test List ▾ |

☐ Filter by Appointment

Message Template   Use variables to personalize the message.

| Message Template ▾ | • **[practicename]** — The practice name
                                           • **[practicephone]** — The practice phone number
Message *0/140 characters*

                                          Set to Repeat

                                          No ▾

← Back to delivery options   Discard   Send ✔

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

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