

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

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**.

Send a Text Message ✕

I want to send a Secure Text SMS Text [What's the difference?](#)

Send to * ✕
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 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 log in.

Template ▼

Form ▼

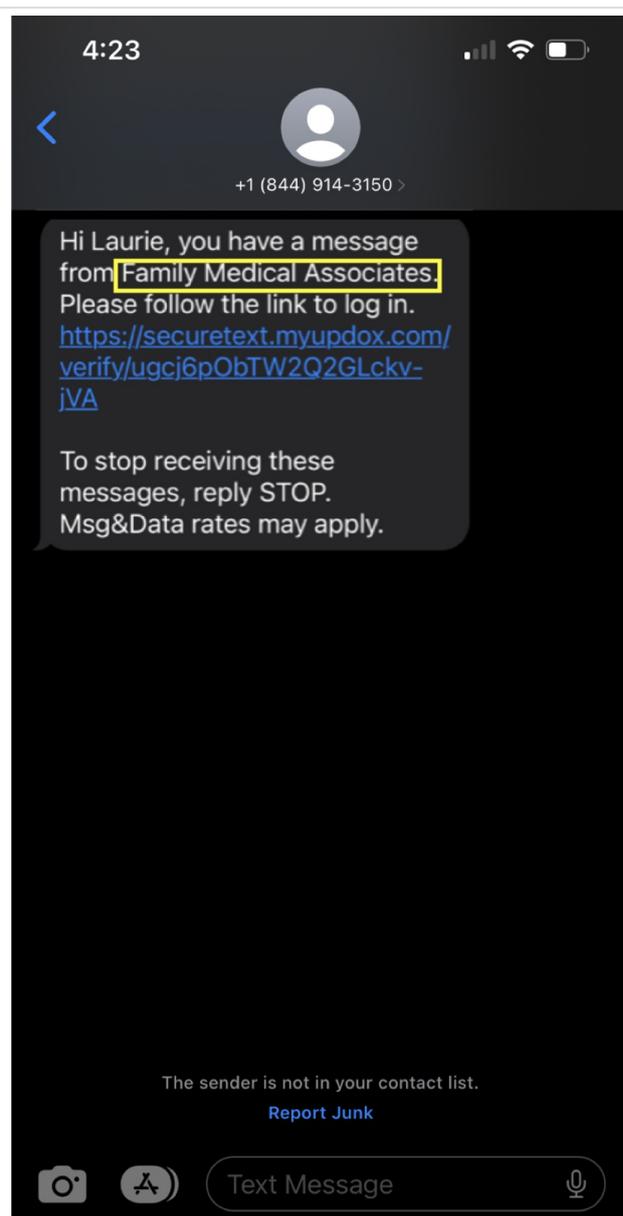
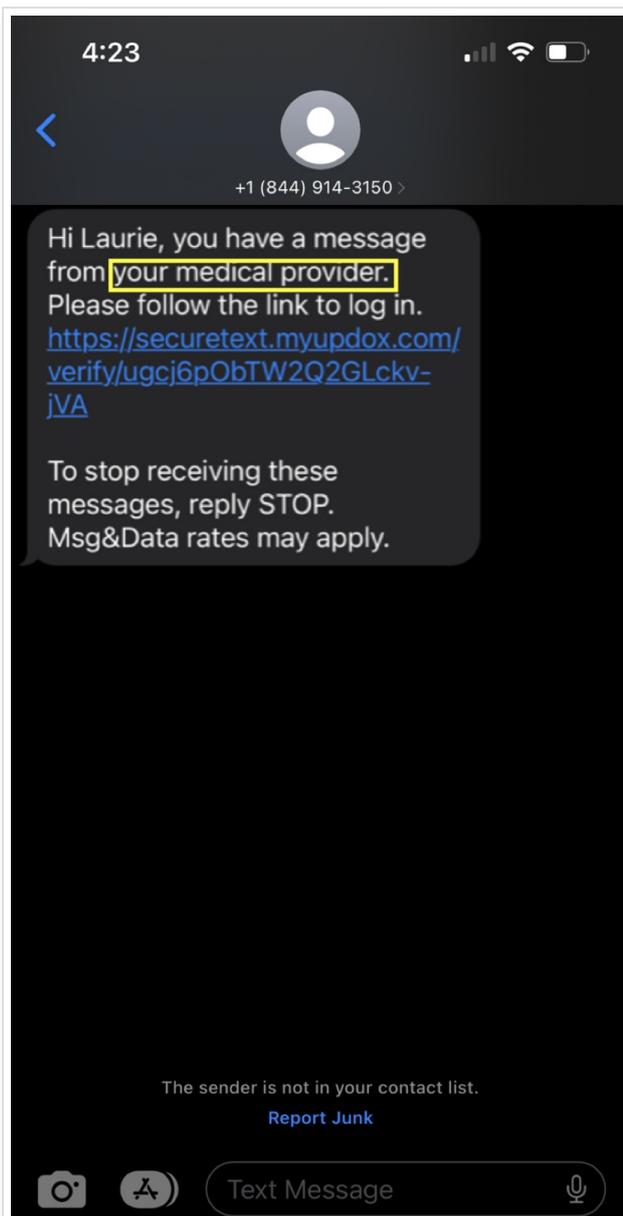
Attachment(s) [+](#) Add attachment 0/4000 characters

Secure 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.

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

No

Send To

Test List

Filter by Appointment

Message Template

Message Template

Message 0/140 characters

Use variables to personalize the message.

- [practicename] — The practice name
- [practicephone] — The practice phone number

Set to Repeat

No

[← Back to delivery options](#)

Discard

Send ✓

**** For a video of this change please check out our Tools & Account Administration section in the Knowledge & Learning Center at**

<https://help.updox.com/help/tools-account-administration>

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

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