

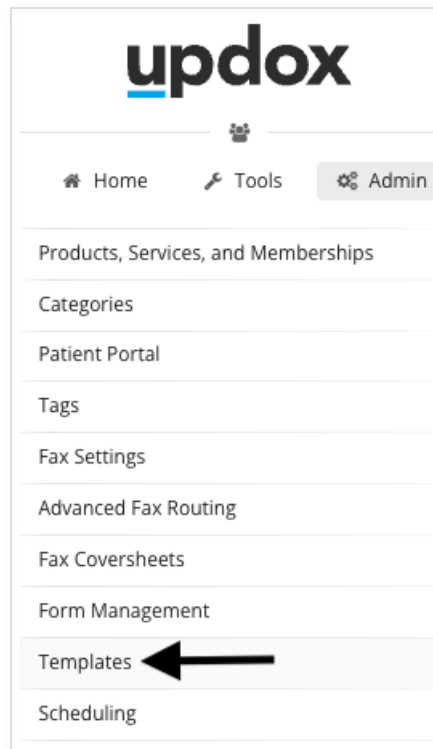
Templates User Guide



Last Modified on 04/11/2024 4:10 pm EDT

Templates are a great way to streamline communication for Secure Text, SMS Text, and Fax and to standardize messaging for user efficiency.

1. After you log in to your Updox account, go to **Admin** under the **Menu** and select **Templates**.



2. Select **New** to create a new template. Enter the title and content you want to include in your message. When you are ready to use the template, check the **Active** box and **Save**.

Edit Template

Update your template.

Title

Preparing for you Video Chat Appointment

Active

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Please review this guide before your scheduled video visit.
<https://help.updox.com/help/video-chat-participant-guide>

This template is available for use in SMS and Secure Text messages, since it is less than 140 characters (currently at 120 characters).

3. The templates you make can be used when sending a Secure Text, SMS Text, or Fax. You can edit your templates at any time in the Templates menu.

Send a Text Message ✕

I want to send a Secure Text SMS Text What's the difference?

Send to *

Patients/registrars must have a date of birth and either a cell phone or an email saved in the Address Book. Contact registrars 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 login.

Template

Form

Attachments

Secure message *

Allow responses

Discard Send Secure Text

Send a Text Message ✕

I want to send a Secure Text SMS Text What's the difference?

Send to *

Assign to a queue Auto-sort incoming messages and responses with workflow queues. [Learn More](#)

⚠ SMS text messaging is not a HIPAA-compliant method of communication. Refrain from entering any PHI in the message contents.

Template

Form

Message *

Discard Send SMS Text

Sending Provider

Fax Coversheet

Address To Individual Business Both

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TEMPLATES
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Message

Preparing for your Video Chat Appointment

Text Template