

# Broadcast Overview



Last Modified on 12/18/2023 4:55 pm EST

## Summary

Updox's Broadcast solution allows practices to communicate directly with their patients. Practices can send their whole patient population Broadcast messages or they can segment groups based on appointment dates, diagnoses, demographics, and other parameters.

The solution is a wonderful tool for keeping segments of patients on track for specific points of care or notifying them of new services offered by your practice. Below is a basic overview of using the Broadcast tool.

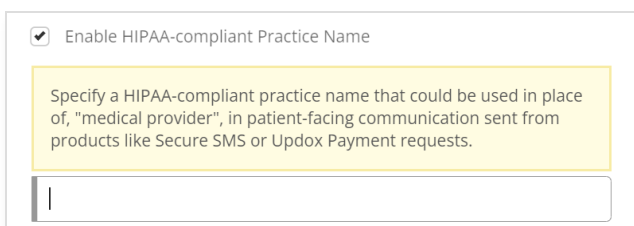
To adhere to the recently updated FCC regulations, all Broadcast messages that are sent as a text message will be moving to a new standard format. This standard format will aid in the messaging verification process brought forward by carriers and will significantly decrease the likelihood of messages being filtered or blocked by carriers. The standard format that a recipient will see when they receive a Broadcast message via SMS will be as follows:

**Standard SMS format:** Hello [First Name], you have a new message from [HIPAA Safe Practice Name\*] at [weblink]

Recipients can interact with the link in the text message to access the Broadcast message. The link will expire after 5 days.

**NOTE:** If you do not have a HIPAA-compliant Practice Name configured, your standard practice name will default in for the SMS message.

If your practice has its HIPAA-compliant Practice Name set in the Practice Settings of the Admin tab in the Updox Inbox, that will be the practice name the recipient sees in the messages they receive from your practice. If not, they will see your standard practice name. To set your HIPAA-safe name, in the Updox Inbox click on the **Menu > Admin > Practice Settings** scroll down to the checkbox next to **Enable HIPAA-compliant Practice Name** and click the checkbox. You can then enter your HIPAA-compliant practice name.



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.

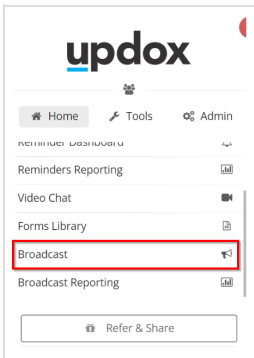
Any existing Broadcast scripts sent via SMS that contain the [FirstName] variable will be replaced by "Recipient" within the content of the message behind the weblink to maintain HIPAA compliance. This will not apply to any Broadcast messages sent via email, portal, or voice.

Existing configurations that your practice has for any Broadcast messages will remain in place, and your practice will not be required to make any changes as the existing content will now simply be shown via the web application versus within the text message directly. Once again, this will aid in the newly required registration process and with message deliverability.

# Basic Step-by-Step Process for Sending a Broadcast

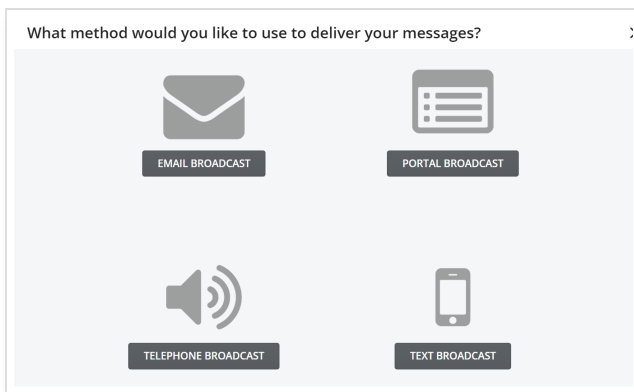
## Step 1:

In your Updox account, open the Menu (located in the top-left corner) and click on **Broadcast**.



## Step 2:

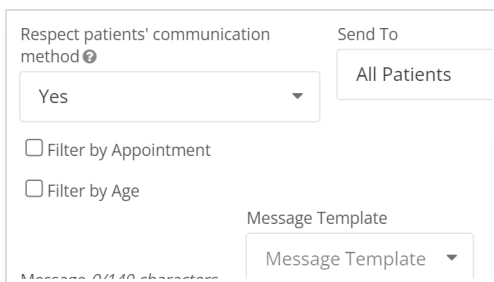
Select the method with which you would like to send your Broadcast message (via Email, Portal, Phone Call, or SMS/Text).



## Step 3:

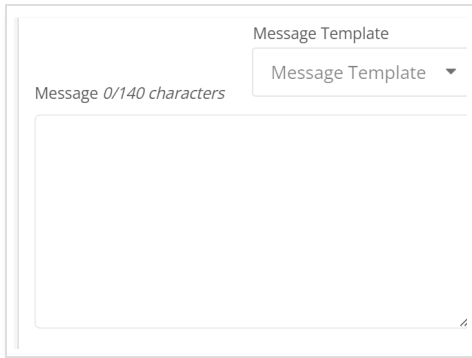
Determine the parameters for the Broadcast you would like to send (i.e. Patient List, filter by appointment, filter by appointment date, etc.).

**Note:** Some filters may not be available to all accounts. If we do not retrieve your appointment data, you will not be able to filter by appointments.



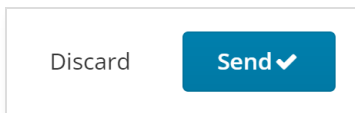
## Step 4:

Select a message template or write your own message.



### Step 5:

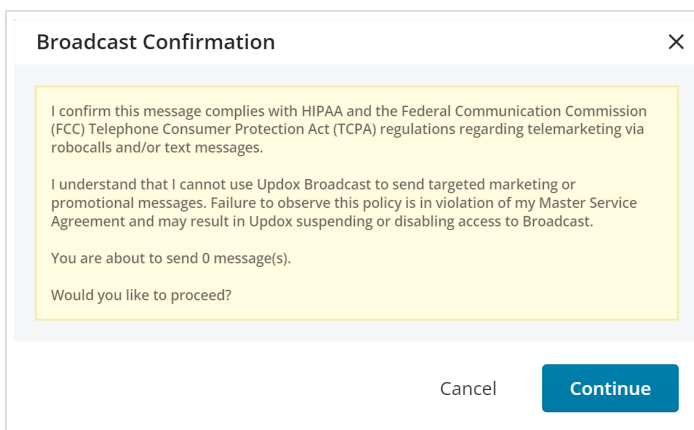
Once you are happy with your message, click the **Send** button.



### Step 6:

After clicking **Send**, you will be presented with a confirmation screen prior to your Broadcast message being sent. Be sure to read the confirmation.

Once read, select **Continue** if you still wish to send your Broadcast message.



**Note:** Portal broadcast will not prompt the confirmation window, once you hit send, the message will be sent.