

How To: Upload a Broadcast Patient List for Practice Fusion



Last Modified on 12/21/2022 9:41 am EST

*****HEADS UP! The following guide is ONLY for those that utilize Practice Fusion as their EMR*****

NOTE: *ONLY* Active patients will be included within the list. Inactive patients (in Practice Fusion) will not show up on the Updox Broadcast list.

Create and Export your Patient List from Practice Fusion:

Step 1:

Within your Practice Fusion account, select "Reports" located on the left hand side of your screen

Step 2:

Select "Patient List Report" OR "Patient List Report NEW"

The screenshot shows the Practice Fusion interface. The top right corner displays 'Help', 'Samanatha Huilman', and 'Updox Product Team'. The left sidebar includes icons for Home, Schedule, Tasks (with a '48' notification), Charts, Messages, Reports (highlighted in blue), and Subscription. The main content area is titled 'Reports' and features a search bar. Below the search bar, the page is organized into two main categories: 'Quality reporting' and 'Clinical reporting'. Under 'Quality reporting', there are links for 'eCQM Dashboard', 'Meaningful Use Dashboard (Medicaid Promoting Interoperability)', 'Meaningful Use Dashboard - Historic', and 'MIPS Dashboard'. Under 'Clinical reporting', there are links for 'Chart notes report', 'Diagnosis registry', 'Drug interactions report', 'e-Prescription report', 'Exported batch CCD files', 'Medication report', 'Patient list report', 'Patient list report NEW', 'Patient prescription history', 'Prescription report', and 'Referrals report - Fax'. The 'Patient list report' and 'Patient list report NEW' links are highlighted in yellow.

NOTE: Be sure to remember with Patient List Report type you have selected as this will dictate the option you will need to select when uploading your list to Updox in **the next section below**.

Step 3:

After selecting your preferred Clinical Reporting type, begin a new query and select your preferred filters

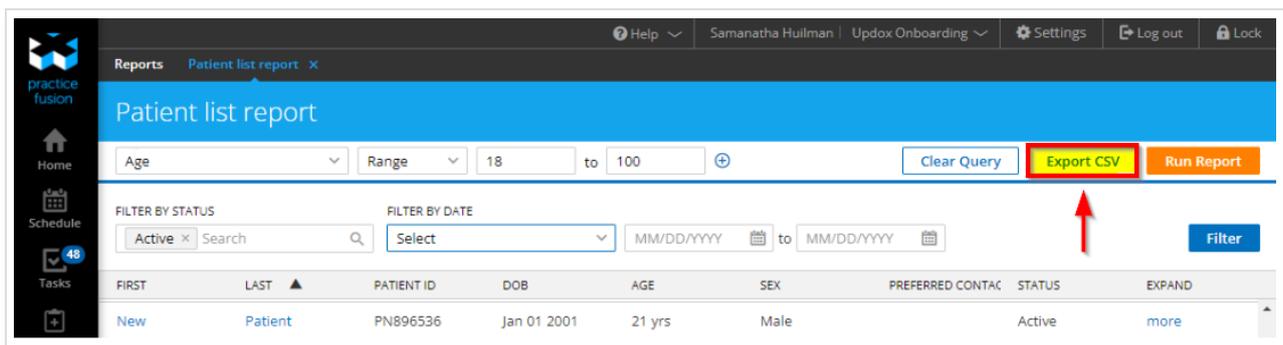
Step 4:

Click the "Run Report" button

Step 5:

Once you have run the report, click the "Export CSV" button located near the top right corner.

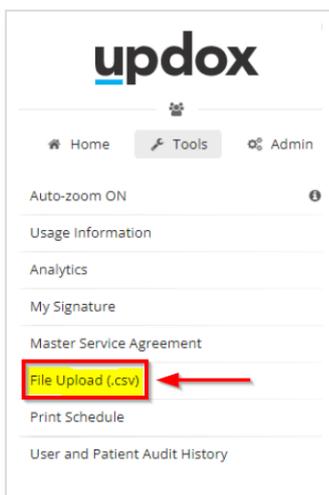
NOTE: A prompt will appear to choose where the CSV file will be saved to -- *be sure to remember this save location as it you will need for **Step 2 below!!***



Upload your Patient List CSV to Updox:

Step 1:

Within the Updox Inbox, navigate to the top left corner and click "Menu" --> then click "Tools" --> and then "File Upload (.csv)"



Step 2:

Select "Browse" and navigate to the location of the CSV that you have just saved.

Once found, you may select the file.

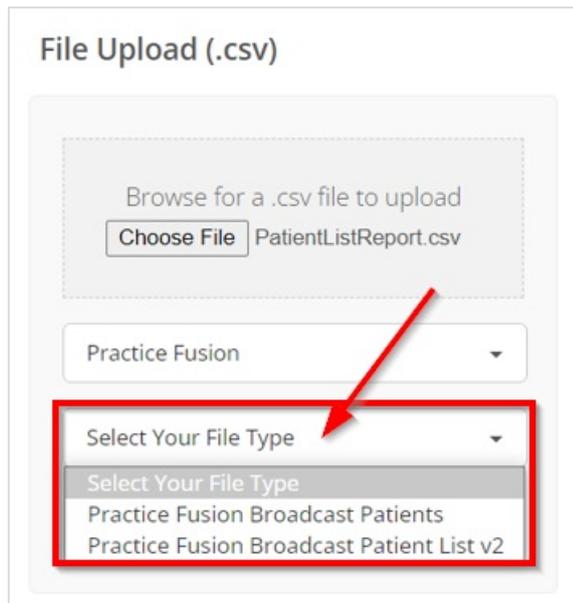
Step 3:

Under the first drop down where it says to "Select your vendor version", the select "Practice Fusion"

Step 4:

Under the second drop down where it says to "Select your file type"...

- If you are using the "Patient List Report" in Practice Fusion to generate the CSV file, then select "Practice Fusion Broadcast Patients"
- If you are using the "Patient List Report NEW" in Practice Fusion to generate the CSV file, then select "Practice Fusion Broadcast Patient List v2"



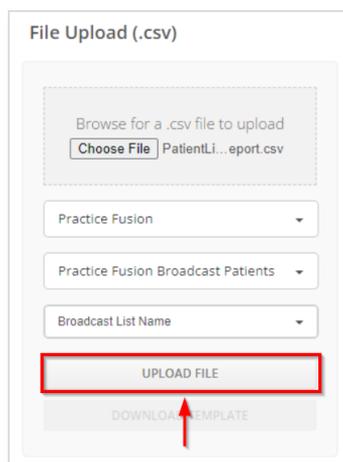
The screenshot shows the 'File Upload (.csv)' form. At the top, there is a dashed box containing the text 'Browse for a .csv file to upload' and a 'Choose File' button next to the filename 'PatientListReport.csv'. Below this is a dropdown menu currently set to 'Practice Fusion'. The 'Select Your File Type' dropdown menu is open, showing three options: 'Select Your File Type', 'Practice Fusion Broadcast Patients', and 'Practice Fusion Broadcast Patient List v2'. A red box highlights the 'Select Your File Type' dropdown menu, and a red arrow points to the 'Practice Fusion Broadcast Patients' option.

Step 5:

In the Broadcast List Name field, enter the name/title of the custom Broadcast list

Step 6:

Click the "Upload file" button



The screenshot shows the 'File Upload (.csv)' form. The 'Broadcast List Name' dropdown menu is now filled with text. The 'UPLOAD FILE' button is highlighted with a red box, and a red arrow points to the 'DOWNLOAD TEMPLATE' button below it.

View your Broadcast Patient List in Updox:

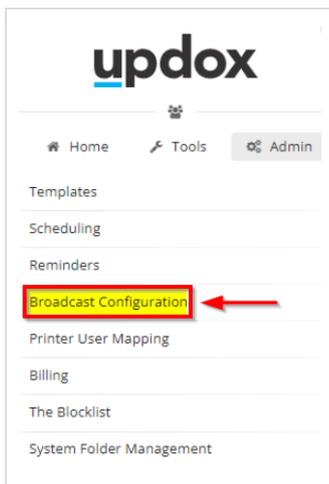
NOTE: You *MUST* be an Updox Admin in order to view and edit your custom broadcast lists.

Step 1:

Once the file shows processed, refresh your browser

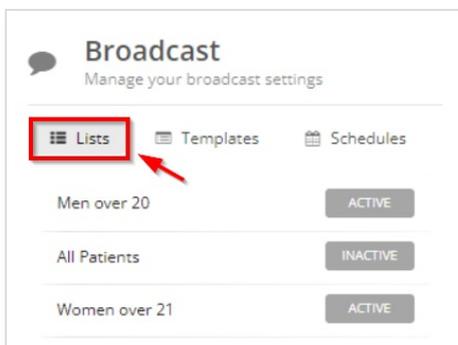
Step 2:

Navigate to the top left corner and click "Menu" --> then click "Admin" --> and then "Broadcast Configuration"



Step 3:

Locate and select your new list by name under the "Lists" tab



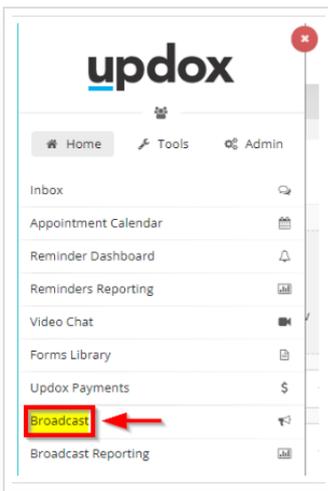
Send a Broadcast to your Broadcast Patient List:

WARNING! You will *ONLY* be able to send Broadcast messages to your patients that have consent enabled in Practice Fusion for the broadcast method you select.

You can find additional information [HERE](#)

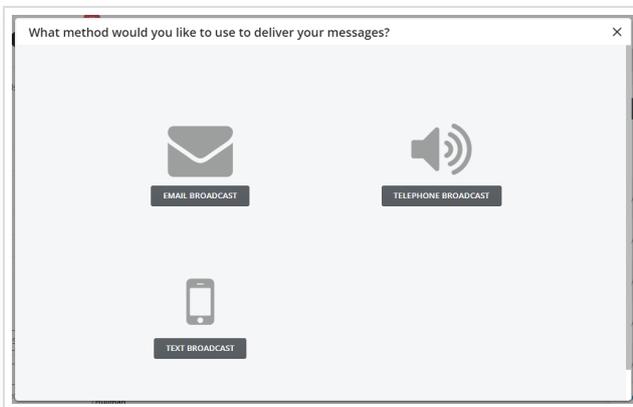
Step 1:

Navigate to the top left corner and click "Menu" --> then click "Broadcast"



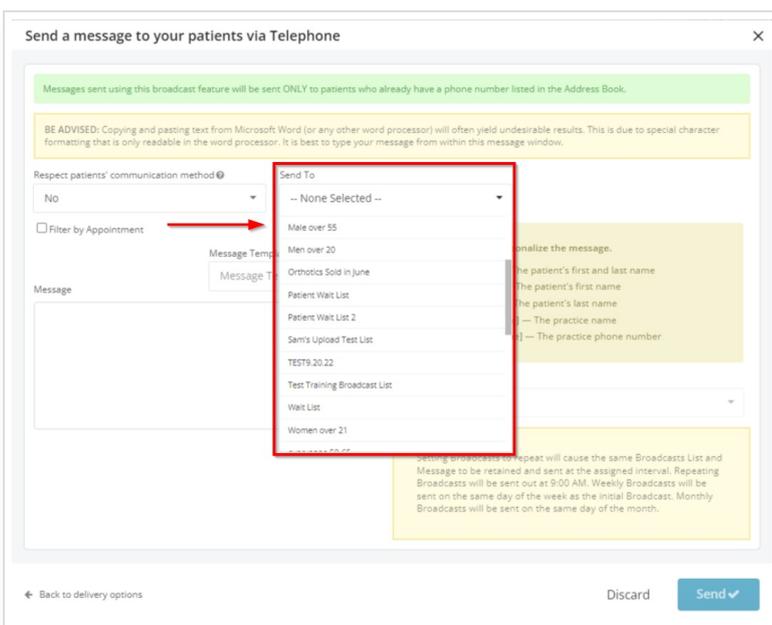
Step 2:

Select the Broadcast method you'd like to use, email, telephone, or text



Step 3:

Under the "Send To" dropdown, select your Broadcast Patient List by name



Step 4:

Enter your broadcast message, then click the "Send" button

NOTE: If Email Broadcasts are chosen, a *subject* is also required.
