

February 2023



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February 2023 – What's New?

'Type Ahead' Search Added for Templates in the SMS Window

Overview

We have added the ability to search and filter your template library when sending an SMS text message to ensure a quick and seamless selection process!

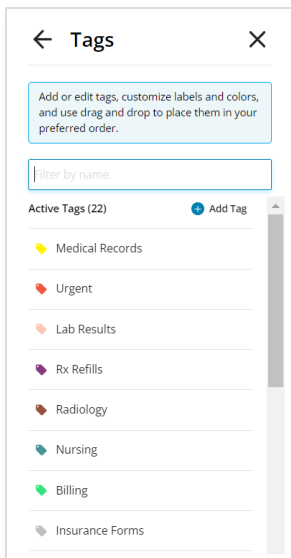
After clicking on the Template drop down, you may begin to type the name of your desired Template. Your options will be filtered in real time with each keystroke, similar functionality to the 'Assign to a queue' and 'Form' dropdowns.

The screenshot shows a 'Send a Text Message' dialog box. At the top, it states: '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.' Below this, there are two radio buttons for 'Notify method *': 'SMS' (checked) and 'Email'. A link 'What's the difference?' is next to the 'Email' option. Underneath is an 'Assign to a queue' dropdown menu with the text 'Select a queue...'. Below that, it says 'Auto-sort incoming messages and responses with workflow queues' and a 'Learn More' link. The main content area has a 'Greeting' field with the text: 'You have a secure message waiting for you from a medical provider. Please follow the link to log in.' Below the greeting is a 'Template' dropdown menu with the text 'Insert a message template'. Below the template dropdown is a 'Form' dropdown menu with the text 'Contact the Office'. Below the form dropdown is an 'Attachment(s)' dropdown menu with the text 'Patient Education Opportunities'. Below the attachment dropdown is a 'Secure message *' dropdown menu with the text 'Test Results'. Below the secure message dropdown is a text input field with the text 'Type message...'.

Tagging: Updated Interface and Look

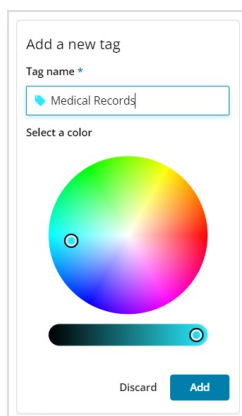
Tags Menu

We have updated the look and feel of the Tags Menu (*Menu* → *Admin* → *Tags*) which displays your active and inactive tags and provides the ability to add a new tag, edit a tag's color or name, activate or inactivate a tag, order tags in your preferred order, and delete a tag.



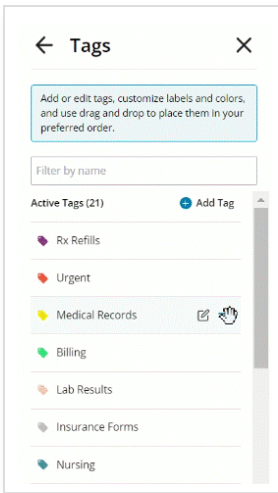
Tag Color Customization

You are now able to completely customize your Tag color(s) by utilizing the newly added color wheel and brightness slider!



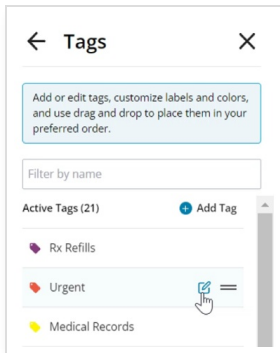
Reordering Tags

To reorder tags, hover your mouse over the double bar in the tag you want to move, then drag and drop it in the order you prefer. This order will be used everywhere where tags can be selected in the app like inbox items, forms, and advanced fax routing rules.



Editing Tags

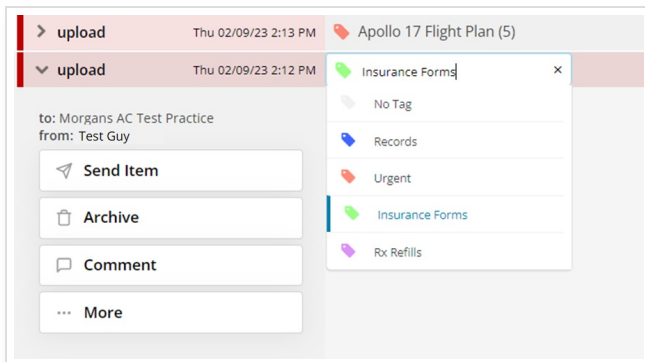
To edit a tag, hover over an existing tag and click on the “Edit” icon.



From here, you can update the tag name and select a new color, and set the tag to active or inactive using the “Active” checkbox.

Applying Tags

You can tag items in your Updox inbox by clicking the tag icon located within the item’s title and selecting the appropriate tag. The tags will be displayed in the order you set in the Tags menu. You can scroll the list of tags using your mouse or the **Up** and **Down** arrow keys, or you can type to quickly filter and find your tag.



A NEW VIDEO CHAT FEATURE IS COMING SOON!!! Stay tuned 😊

