

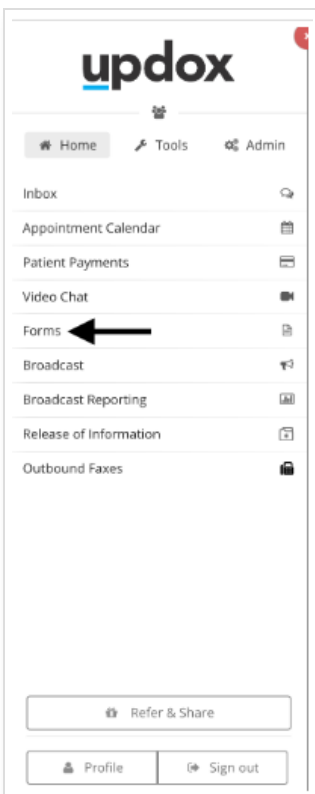
# Tips and Tricks: Using Broadcast with Forms

Last Modified on 01/29/2025 3:37 pm EST

**Broadcast** is a great way to communicate directly with your patients. One great way to use Broadcast is to combine it with Forms. You can send forms through Broadcast and patients can fill them out and return them. Let's take a look at an example.

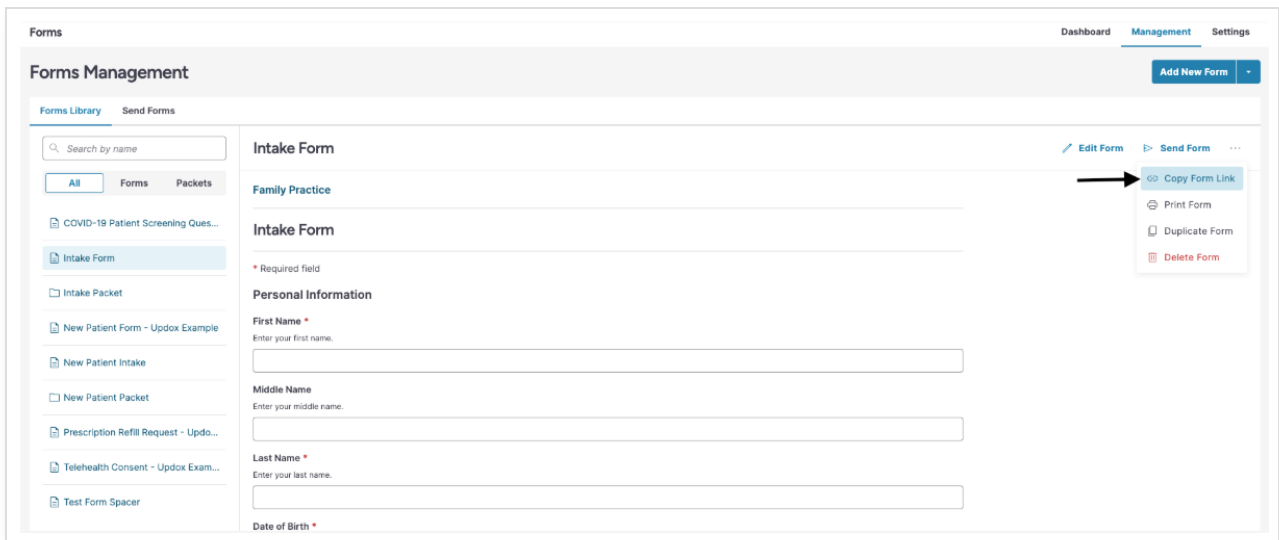
First, let's get the Form link.

Go to **Home > Forms**.

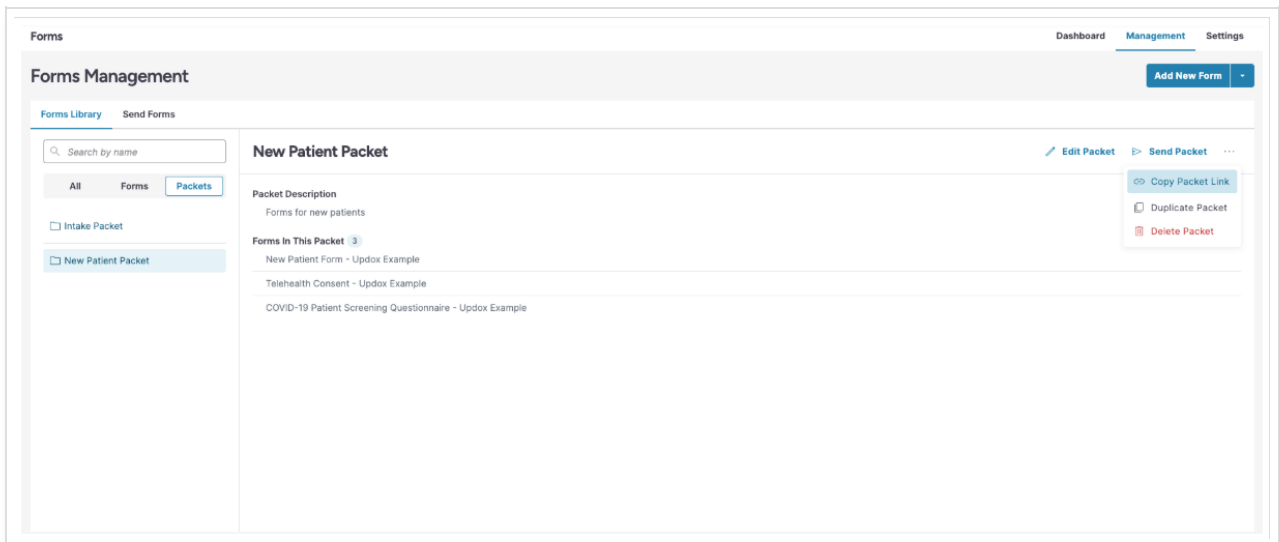


Select the form you would like to use and click the icon for **Copy Form Link**.

**Helpful Hint:** You could connect your [form to a queue](#) to direct it back to the designated queue after the patients fill it out from the Broadcast message.

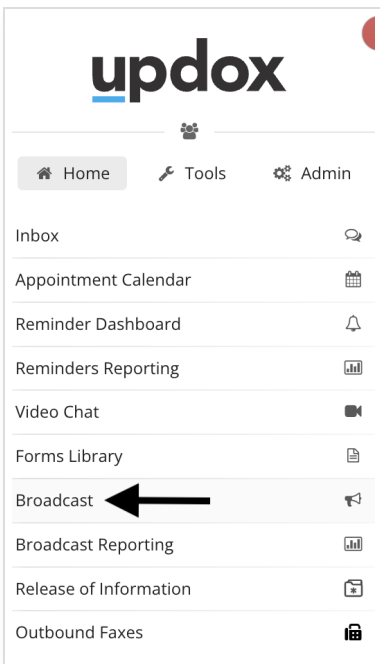


You can also copy a link to a packet by selecting **Copy Packet Link**.

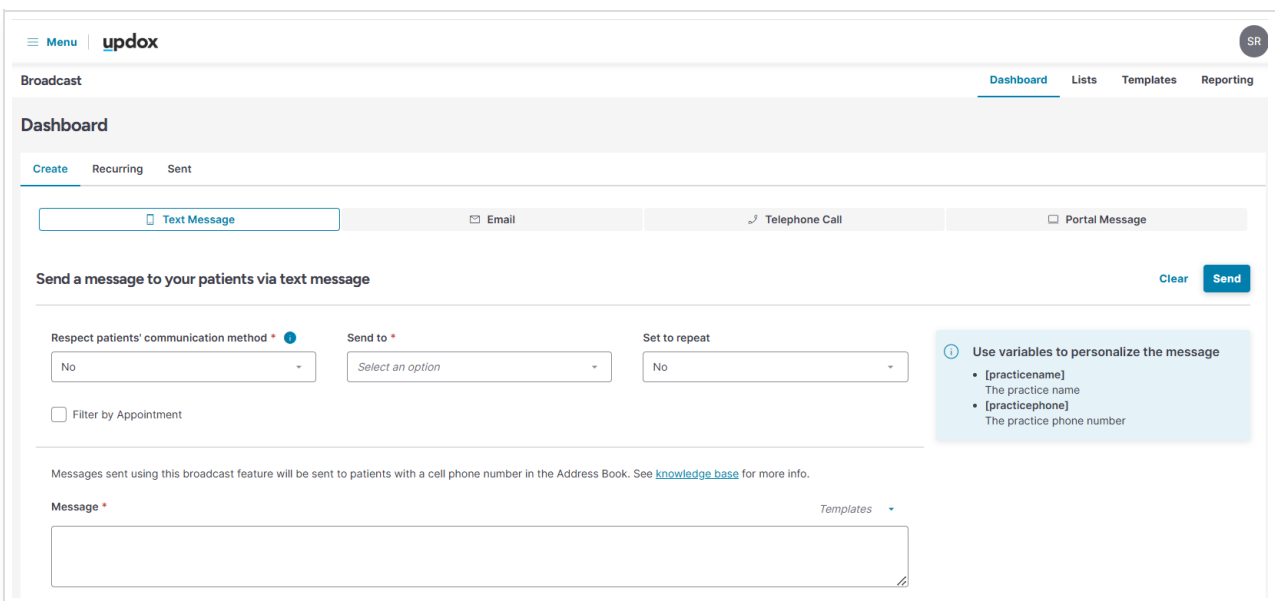


Now that we have copied the link, let's set up our Broadcast message.

Go to **Home > Broadcast**.



Select the type of message you would like to Broadcast. With the Form, we can use email, text, or portal. In this example, we will use text.



Next, select who you are sending the message to. This could include any **Broadcast lists** you have created or the options in the **Send To** menu.

For this example, let's select Tomorrow's Appointments.

Menu | **updox** SR

Broadcast Dashboard Lists Templates Reporting

**Dashboard**

Create Recurring Sent

Text Message Email Telephone Call Portal Message

Send a message to your patients via text message Clear Send

Respect patients' communication method \* i

Send to \* 

- All Patients
- All Contacts
- Today's Appointments
- Tomorrow's Appointments
- Next 7 Days' Appointments

Set to repeat  or more info.

i Use variables to personalize the message

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

Messages sent using this broadcast feature will be sent to patients with  or more info.

Message \*  Templates ▾

Fill out your message and paste the link to the form. (You can also use any Broadcast [templates](#) you have created to populate the message). Click **Send** to continue.

Text Message Email Telephone Call Portal Message

Send a message to your patients via text message Clear Send

Respect patients' communication method \* i

Send to \*

Set to repeat

i Use variables to personalize the message

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

Messages sent using this broadcast feature will be sent to patients with a cell phone number in the Address Book. See [knowledge base](#) for more info.

Message \*  Templates ▾

Read the Broadcast Confirmation and click **Continue**.

## Send Broadcast Text Message ✕

I confirm this message complies with HIPAA and the Federal Communication Commission (FCC) Telephone Consumer Protection Act (TCPA) regulations regarding telemarketing via robocalls and/or text messages.

I understand that I cannot use Updox Broadcast to send targeted marketing or promotional messages. Failure to observe this policy is in violation of my Master Service Agreement and may result in Updox suspending or disabling access to Broadcast.

You are about to send 1 message(s). Would you like to proceed?

Cancel
Continue

Your patients will receive the form link, fill it out, and submit it back to your inbox for you to review.

form
Thu 11/09/23 2:17 PM
COVID-19 Patient Screening Questionnaire - Updox Example
System Process

to: Form Responses  
from: System Process

✉ Send Item

📁 Archive

💬 Comment

⋮ More

### Form:COVID-19 Patient Screening Questionnaire - Updox Example

COVID-19 Patient Screening Questionnaire	
<small>All questions marked with an asterisk (*) are required and must be completed before you are able to submit the survey.</small>	
Patient Name	Sample Patient
Date of Birth	1984-07-08
<small>Are you currently experiencing, or have experienced in the past 14 days, any of the following symptoms?</small>	
Fever or feeling feverish?	No
Cough	No
Shortness of Breath or difficulty breathing	No
Sore Throat	No
New loss of taste or smell	No
Chills	No
Head or muscle aches	No
Nausea, diarrhea, vomiting	No
In the past 14 days, have you been in close proximity to anyone who was experiencing any of the above symptoms?	No
In the past 14 days, have you been in close proximity to anyone who has tested positive for COVID-19?	No
Have you been tested for COVID-19	No

Using Forms with broadcast can help close the loop when communicating with patients.