

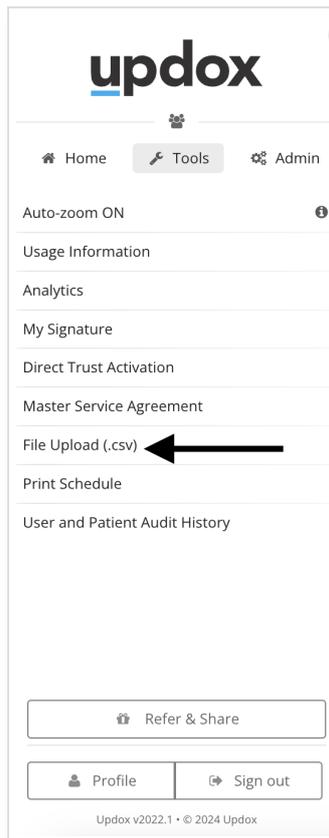
# How To: Upload a Broadcast Patient List



Last Modified on 02/16/2024 4:24 pm EST

Uploading a patient Broadcast list is an easy way for you to create a group of patients to use in your Broadcast communications.

1. Access the File Upload area in Updox by clicking on **Menu**, then **Tools**, then **File Upload (.csv)**.



2. In the first dropdown, choose **Updox Standard Maps**, then **Broadcast Patient List** in the second dropdown. Next, Click **Download Template**. A template .csv will open in a separate tab for you to use. You can also download the template [here](#)

### File Upload (.csv)

Browse for a .csv file to upload

No file chosen

**Note:** The Broadcast Patient List requires there to be existing patients who have the correlating Patient ID. When creating your patient list, you must follow the standard format exactly as displayed, ensuring that all the columns are in the correct order.

Below is an example of the Broadcast Patient List. The following fields are required for Upload:

- Patient ID
- First Name
- Last Name
- DOB
- Gender
- Active True

|   | A          | B          | C         | D       | E      | F            | G         | H       | I     | J        | K               | L           | M            | N      |
|---|------------|------------|-----------|---------|--------|--------------|-----------|---------|-------|----------|-----------------|-------------|--------------|--------|
| 1 | Patient ID | First Name | Last Name | DOB     | Gender | Address 1    | Address 2 | City    | State | Zip Code | Email           | Home Phone  | Mobile Phone | Active |
| 2 | sample123  | Jane       | Doe       | 1/30/70 | F      | 123 Main St. | Apt. 1    | Anytown | OH    | 55555    | sample@mail.com | 555-555-555 | 555-555-555  | TRUE   |
| 3 |            |            |           |         |        |              |           |         |       |          |                 |             |              |        |

4. After you have your template ready, add the file from your device, name the file, and upload.

### File Upload (.csv)

Browse for a .csv file to upload

**Choose File** Broadcast...nt List.csv

Updox Standard Maps ▾

Broadcast Patient List ▾

**Sample Upload Broadcast** ▾

UPLOAD FILE

DOWNLOAD TEMPLATE

5. Your .csv will display under **Unprocessed Files**.

#### File Upload (.csv)

Browse for a .csv file to upload

**Choose File** | No file chosen

Select Your Vendor Version ▾

No Files for Vendor ▾

UPLOAD FILE

REFRESH

#### Unprocessed Files

| Filename                   | Uploaded            | Status |
|----------------------------|---------------------|--------|
| Broadcast Patient List.csv | 02/09/2024 12:21 PM | 🕒      |

#### Processed Files

| Filename           | Uploaded            |
|--------------------|---------------------|
| Patient Upload.csv | 02/09/2024 10:02 AM |

6. Once your file is finished processing, it will automatically move to **Processed Files**.

#### File Upload (.csv)

Browse for a .csv file to upload

**Choose File** | No file chosen

Select Your Vendor Version ▾

No Files for Vendor ▾

UPLOAD FILE

REFRESH

#### Processed Files

| Filename                   | Uploaded            |
|----------------------------|---------------------|
| Broadcast Patient List.csv | 02/09/2024 12:21 PM |
| Patient Upload.csv         | 02/09/2024 10:02 AM |

7. The list will be available with the name you gave it when you send a Broadcast message.

### Send a message to your patients via Text Message

Messages sent using this broadcast feature will initially send the following standard message: "Hello [First Name], you have a new message from [HIPAA Safe Practice Name] at [weblink]".

Upon selecting the weblink, the recipient will be taken directly to a page displaying the broadcast message input below.

If a HIPAA Safe Practice Name has not been set within Practice Settings, the full Practice Name will be used.

Messages sent using this broadcast feature will be sent ONLY to patients who already have cell phone numbers listed in the Address Book. Please restrict your messages to 140 characters.

**BE ADVISED:** Copying and pasting text from Microsoft Word (or any other word processor) will often yield undesirable results. This is due to special character formatting that is only readable in the word processor. It is best to type your message from within this message window.

Respect patients' communication method

Filter by Appointment

Message 0/140 characters

Send To: -- None Selected --

Message Template: Sample Upload Broadcast

Test List

Yesterday's Appointments

Last 7 Days' Appointments

Last 30 Days' Appointments

Personalize the message.

[ ] -- The practice name

[ ] -- The practice phone number

[Back to delivery options](#) Discard Send ✓

8. You can manage your Broadcast list in **Menu > Admin > Broadcast Configuration > Lists**.



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## Broadcast

Manage your broadcast settings

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ACTIVE

Sample Upload Broadcast

ACTIVE

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