

## Secure Text Frequently Asked Questions

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#### 1) How does Secure Text work?

Secure Text will provide an SMS message to a recipient as a push notification to alert them that they have a Secure Text from their practice/pharmacy. The SMS message will contain a unique hashed link that will redirect the recipient to a browser that will prompt them to authenticate (with a PIN) in order to view the Secure Text. Each active conversation thread with the patient will have its own unique hashed link (unique by recipient) in the new SMS message that serves as a push notification.

#### 2) Who can Updox users send a Secure Text to?

Updox users can send a Secure Text to any patient in the system that has a First Name, Last Name, Date of Birth (DOB), and valid Cell Phone number. They may also send it to any Contact in the Updox Address Book that has a First Name, Last Name, and a valid Cell Phone number.

#### 3) How long are links active for?

Currently, links are active for 48 hours. If a new Secure Text is sent by the practice/pharmacy or by the recipient within that active thread time frame, the link active time is reset again at 48 hours.

#### 4) What does the patient see?

When the initial Secure Text that is sent to a patient recipient, the patient will have to verify with DOB and Last Name to verify their identity as the patient. After verification, she will be prompted to create a 5-digit PIN to use to authenticate and view any Secure Text messages. If they ever forget their pin, they can always authenticate with their last name & DOB.

When the initial Secure Text that is sent to a non-patient recipient, the recipient will have to verify with her First and Last Name (exactly as it appears in the Updox Address Book at the sending practice/pharmacy). After verification, will be prompted to create a 5-digit PIN to use to authenticate and view any Secure Text messages.

#### 5) How many attempts do patients get to authenticate?

Patients will have 3 attempts to successfully authenticate to view the Secure Text. If the patient is locked out, a system message will be sent to the practice / pharmacy to alert them that the patient has been locked out. Updox users will be able to click the "Resend Secure Link" button from the most active Secure Text thread in the Sent/Inbox folder in order to unlock the patient's attempts and provide a new link for them to authenticate.

**6) How many attempts do non-patient recipients get to authenticate?**

Non-patient recipients will have 5 attempts to successfully authenticate to view the Secure Text. If the recipient is locked out, a system message will be sent to the practice / pharmacy to alert them that the recipient has been locked out. Updox users will be able to click the “Resend Secure Link” button from the most active Secure Text thread in the Sent/Inbox folder in order to unlock the recipient’s attempts and provide a new link for them to authenticate.

**7) Will recipients have to login every time to view a new message?**

Every time a new Secure Text is sent to a recipient, they will have to click the link to authenticate and view the message. However, if the recipient is already logged in and viewing the Secure Text conversation, new messages will automatically appear if the recipient is logged into an active session. The recipient’s session in the browser after successfully authenticating will last for 30 minutes (and will be refreshed after an interaction with the conversation – such as sending a new message or downloading an attachment). After the recipient is timed out, she will need to re-authenticate in order to view the Secure Text conversation.

**8) What happens if Patients forget their PIN?**

The Patient will be able to initiate a Forgot PIN workflow in which they will be prompted to verify their identity and then create a new PIN after successful verification. They will have 3 attempts to verify her identity.

**9) What happens if non-patient Recipients forget their PIN?**

The Recipient will be able to initiate a Forgot PIN workflow in which they will be prompted to verify their identity and then create a new PIN after successful verification. They will have 5 attempts to verify her identity.

**10) What phone number does the recipient see for a Secure Text?**

For a Secure Text notification, the SMS message will come from a Toll-Free number and will include the link to open the HIPAA-compliant text.

**11) Can recipients view the whole conversation history?**

Yes, recipients will be able to view their whole conversation history with their given practice or pharmacy.

**12) How does conversation threading work?**

Updox users will be able to reply to the Secure Text Inbox item while the thread is active. A thread will be active for 48 hours after the most recent message either to or from the recipient. After the 48-hour window is completed, the thread will officially be closed, and the practice/pharmacy will no longer be able to reply in the Secure Text Inbox item but will rather have to initiate a new Secure Text with the recipient if they wish to.

**13) Is there any place that patients can access Secure Text conversations that have gone past the 48 hour window?**

Currently, recipients will only be able to access the conversation if they have an active link to it. However, if a conversation is expired, recipients will still be able to send a text to the practice/pharmacy after authenticating with their PIN.

**14) Can I send attachments as an Updox user?**

Yes, Updox users will be able to send multiple attachments to a recipient within the Secure Text workflow. Currently there is no limit to the type of file types that can be attached.

**15) Can recipients send attachments?**

Yes, recipients will be able to send attachments to practices / pharmacies. These attachments will show up in the Inbox Secure Text items the same way as attachments show up for Fax Inbox items.

Currently the accepted file types for patients to send are: image files, .mp3 audio, .mp4 video, .xlsx, .xls, .pdf, .doc, .docx, .csv, .txt, .mov, .wav. The supported file size is 50MB.

**16) Will every Updox user, regardless of access level, be able to send messages on behalf of a PID?**

**Is there any way that a practice can turn off this function at the user level?**

Currently, if a user has access to the Inbox, they will be able to send messages on behalf of a PID. There are plans to support roles based access for this functionality in the future.

**17) Can text messages be secure by default?**

Yes, there is a configuration setting under **Admin > Secure Text** that will allow practices/pharmacies to select to make Secure Text as the default option.

**18) Can recipients respond to expired threads?**

Yes, recipients can respond to expired threads. They will need to authenticate with their PIN in order to send a message but they will not be able to view message history.