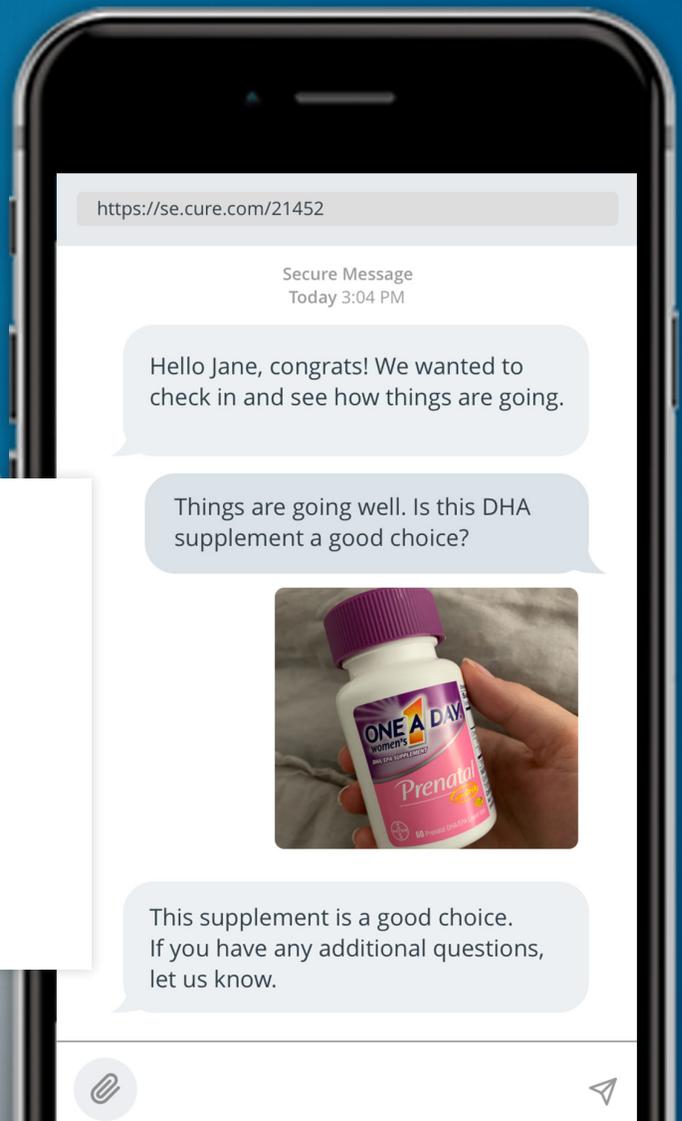




# SMS and Secure Text

A quick guide to help get you started.

UPDATED 04/07/2020

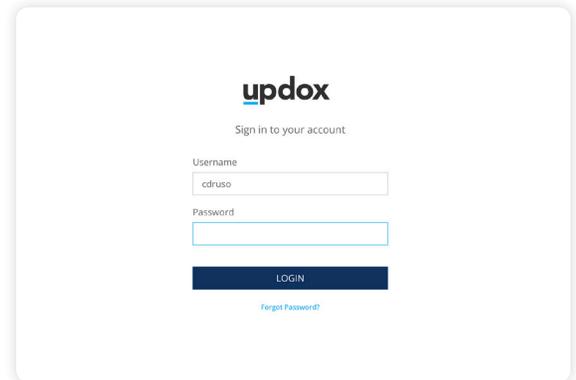


# How to use Updox SMS and Secure Text

A quick guide to get your practice using SMS and Secure Text today.

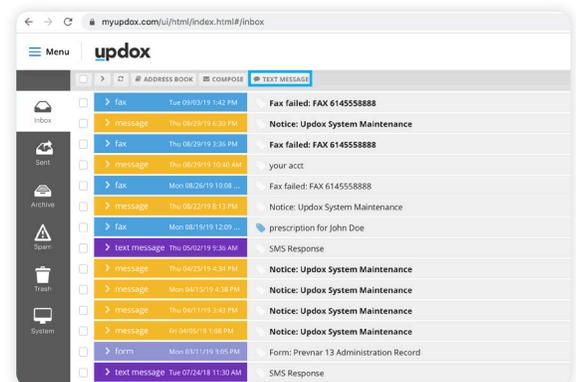
## 1 Log in to Updox

1 Enter your username and password to log in to your Updox account.



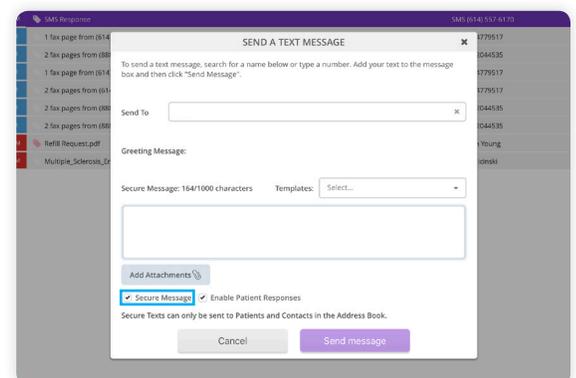
## 2 Locate the Text Message button

2 The Text Message button is located in the Menu line of the Updox Inbox. To initiate a text message, simply click the button.



## 3 Select Secure or SMS text

3 A Text Message window will open, and you will be able to select the option to send SMS or a Secure Text message. Content that contains PHI should be sent via Secure Text to ensure HIPAA compliance.



## Did you know?



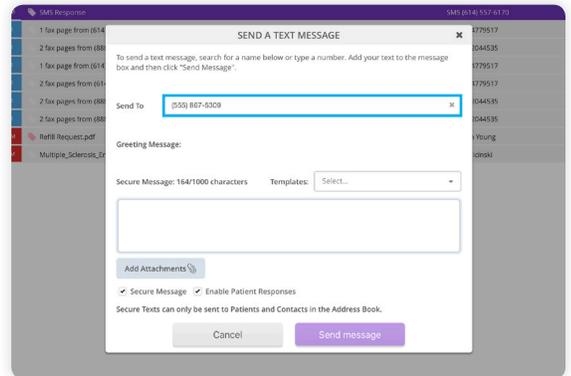
It is useful to set up templates for frequently used messages. Create templates in Updox by going to the Admin menu and selecting Templates.

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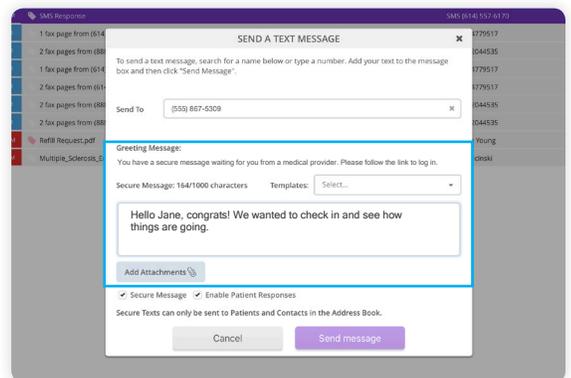
## Select the recipient

Search for the recipient or contact by typing in the name or phone number, or simply type the recipient's phone number for SMS. For Secure Text, recipients must have a phone number and date of birth saved in the Updox Address Book.



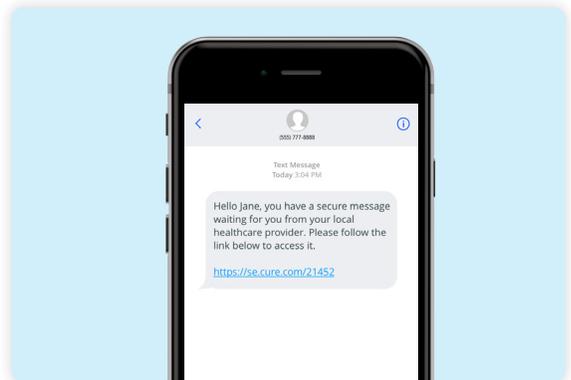
## Create the text message content

For Secure Text, there is a standard greeting message. There is also the ability to choose a template or type the message for both SMS and Secure Text.



## What your recipient receives

For SMS, the recipient or contact receives a standard text message. For Secure Text, your recipient receives the standard greeting message and link. For both, the phone number will be the practice number.



## Did you know?



When sending a Secure Text, you can allow recipient replies by checking "Allow Responses".

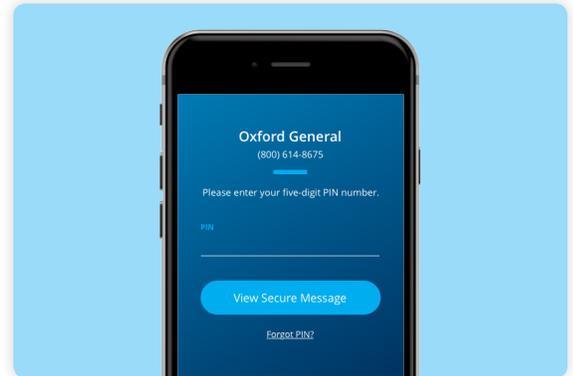
# How to use Updox SMS and Secure Text

A quick guide to get your practice using SMS and Secure Text today.

## Clicking the link

7

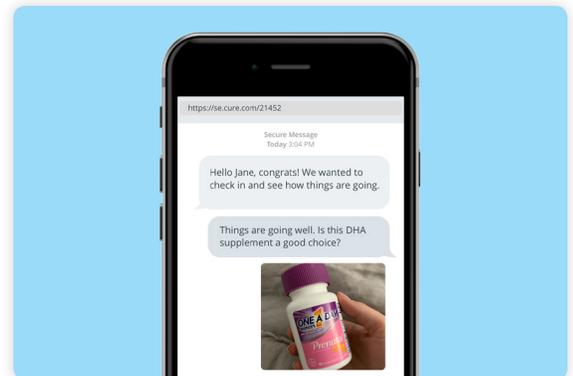
For Secure Text, the link is active for 48 hours. When the link is clicked, a browser will open and the recipient will be asked to enter their date of birth and last name. Next, they will set up a 5-digit PIN they will use to view all future messages.



## Texting in the secure environment

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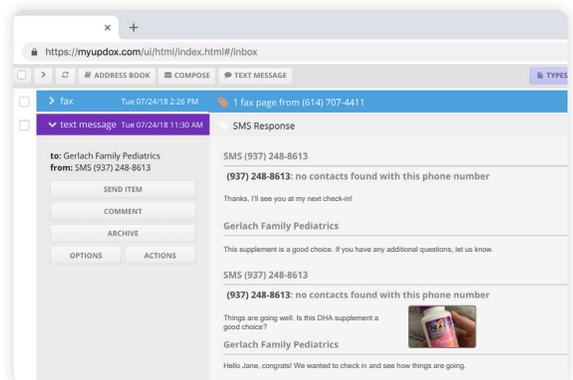
After the information is entered, the recipient will be able to review the Secure Text. If a reply is requested, the recipient can enter a message, add files or photos.



## Manage text messages in the Inbox

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When the recipient replies, a new item will appear in the practice Inbox and their response will be added to the original message thread. You can also track receipt of text messages and easily file conversations to the EMR.



## Did you know?



Updox support is readily available to help. You can reach our support staff by visiting [updox.com/support](https://www.updox.com/support).