Web Application 2.0
User Guide

6/3/2019

Additional resources are available at the Updox Learning Center.
Provider resources are at: http://help.myupdox.com
Pharmacy resources are at: http://rxhelp.myupdox.com

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Pharmacy resources are at: http://rxhelp.myupdox.com

Supported Web Browsers, Devices, Operating Systems

Location: n/a

Browsers

- Internet Explorer (same as Microsoft supports, IE11 and Edge as of 8/8/17)
- Google Chrome (current, plus last 2 versions)
- Safari Version (current, plus last 2 versions)
- Firefox Version (current, plus last 2 versions)

Mobile Devices

- Apple iPhone
- Apple iPad
- Android mobile
- Android tablet

Minimum Resolution

- 1024×768

Operating Systems

- Windows (same as Microsoft supports, 8 and 10 as of 8/8/17)
- MacOS (current, plus last 2 versions)
- Android (current, plus last 2 versions)
- Apple IOS (9.3.5 | 10.3.2 | 10.3.3)

Sign Out

Location: Menu

To sign out:

1. Click **MENU**.
2. Click **Sign Out**.

Log In

Location: n/a

To log in:

1. Using your browser, go to the Updox web application address.
2. Enter your **Username**.
3. Enter your **Password.**
4. Click **LOGIN**.

	If you've forgotten your password, click the ***Forgot password*** link to reset it.

	If you've forgotten your username, contact Updox Support or your EHR vendor.

Inbox

The Inbox is the central hub for sending and receiving Direct messages, emails, and faxes.

Accessing the App

This section describes the process to log in and out of the web application.

Log In

Location: Login

To log into the Web Application:

1. Using your web browser go to the URL specified by your EHR vendor, if any; otherwise go to **ui.myupdox.com.**
2. Enter your **Username**.
3. Enter your **Password**.
4. Click **LOGIN**.

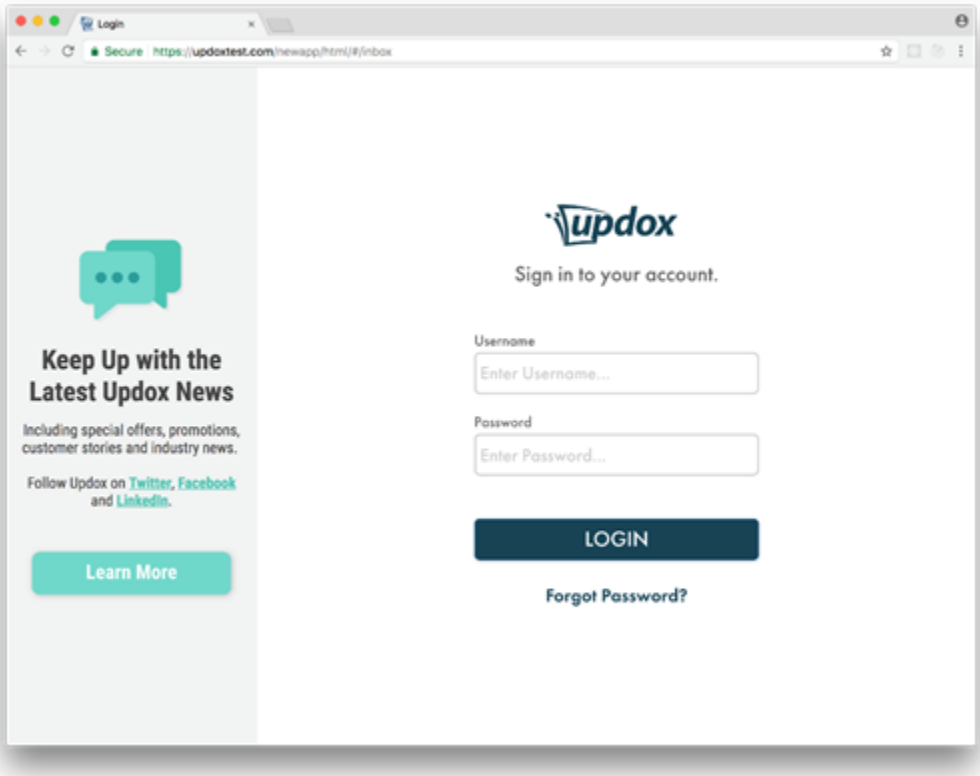
If you have forgotten your password, click on **Forgot Password** to reset it. You have up to 10 consecutive tries to enter your correct username and password before your account is temporarily locked for 4 hours. Entering the same incorrect username/ password combination repeatedly only counts as one failed attempt. If you need access sooner, the practice administrator can release the temporary lock by issuing you a new password.

If your password has been reset or if it doesn't meet the current requirements, the first time you log in you'll be asked to change your password. The password rules are:

- At least 8 characters (maximum of 30 characters)
- At least one upper case letter
- At least one lower case letter
- At least one number or special character
- Does not contain your user name

If you haven't logged in for over a year your password will automatically be reset and you'll need to click on **Forgot Password** to change it.

The left panel on the login screen will display informational messages to help you better use the application.



Forgot Password

Location: Login

If you have forgotten your password:

1. On the login screen, click **Forgot password**.
2. Enter your **Username**.
3. Click **RESET**.
4. If your username is an email address, we will send the instructions directly to you.
5. If your username is not an email address, we will send the instructions to your Account Holder's email address.
6. Once the email is received, open it then click the link. Note: the link expires in 4 hours. If you waited too long, go back to the login screen and click **Forgot password**.
7. Enter **New Password** (see password rules).
8. Enter password again in **Confirm Password**.
9. Click **Change Password**.

Password Rules:

- At least 8 characters (maximum of 30 characters)
- At least one upper case letter
- At least one lower case letter
- At least one number or special character
- Does not contain your user name

Another Option:

1. Ask your Administrator to change your password.

Sign Out

Location: Menu

To log out:

1. Click **MENU**.
2. Click **Sign out**.

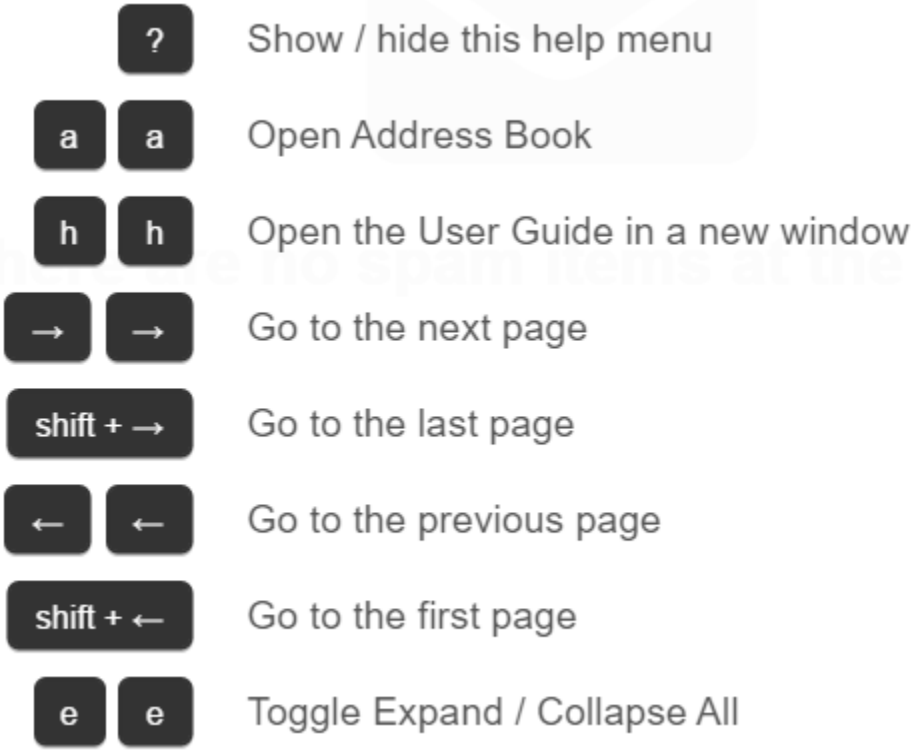
Inactivity Sign Out

For security purposes you will automatically be signed out of the application after a period of inactivity. You'll receive an alert message 5 minutes before to let you know the time is getting close.
The number of inactivity (idle) minutes are configured in the **Practice Settings**.

Keyboard Shortcuts

Location: Workspace

In addition to navigating though the application using a mouse you can also use the following keyboard shortcuts:



Notes:

- When the shortcut has two of the same key, quickly press that key twice
- When a shortcut has a + sign, press and hold the first key then the second key (don't press the + sign)

Inbox Configuration

This section walks you through the steps to configure the Inbox features.

Inbox Setup Checklist

Location: Admin

You need Admin privileges to complete these functions.

Setup steps for the Inbox:

- ? Define Practice Information
- ? Define Practice Settings
- ? Rename Tags
  - What are Tags
- ? Add Users (be sure to set the time zone)
- ? DirectTrust Activation
  - What is DirectTrust
- ? Add Queues (optional)
  - What are Queues
- ? Add Templates (optional)
- ? Install Updox Central (optional for most EHR software)
- ? Add a Virtual Printer or Updox Central Virtual Printer

Practice Management

This section walks you through the steps to configure information about your practice.

Define Practice Information

Location: Admin

You need Admin privileges to complete this function.

One of the main steps in the configuration of the application is to enter information about your practice.

To define your practice:

1. Click **MENU** > **Admin** > **Practice Information.**
2. Enter the following information:
   - Name
   - Address
   - Practice Email
   - Main Phone

- Fax Number
- Practice website URL (optional)
- Facebook URL (optional)
- Twitter URL (optional)
- If using Direct messaging, select the user who represents the practice and completed the identity verification
- Practice NPI
- Practice Classification/Specialty

3. Click **Save.**

Define Practice Settings

Location: Admin

You need Admin privileges to complete this function.

Another of the main steps to configure the application is to define the practice settings to use.

To define your practice settings:

1. Click **MENU** > **Admin** > **Practice Settings.**
2. Select the **Practice Timezone**.
3. Click the checkbox for any of the following options you want to use:
   - ? **Show inactive patients/contacts when searching**
   - ? **Forward incoming faxes to one of more email addresses**
     - This setting applies only if you're using the Faxing functionality.
     - If using this setting also enter one or more email addresses; use commas to separate multiple addresses.
   - ? **Keep forwarded faxes in Updox**
     - This setting applies only if you're using the Faxing functionality.
   - ? **Automatically save incoming items to disk (Updox Central)**
     - This setting applies only to implementations using Updox Central to integrate with the EHR software.
     - Select PDF or TIFF
   - ? **Do not add last page of metadata when generating PDFs**
   - ? **Send email replies to a non-Updox email address**
     - If using this setting also enter the address.
   - ? **Enable displaying a custom fax from number**
     - This setting applies only if you're using the Faxing functionality.
   - ? **Keep items in Sent for**
     - Use this setting to "automatically" move items from the Sent folder into the Archive folder after a specified period of time from the item Sent date.
     - The choices are 1 month, 3 months, 6 months, 1 year, or 7 years (default).
     - For example, if the setting is 7 years and there is a message in the Sent folder that was sent 6 years and 11 months ago, it will automatically be moved into the Archive folder in another month.
   - ? **Keep items in Archive for**
     - Use this setting to "automatically" move items from the Archive folder into the Trash folder after a specified period of time from when the item was placed in the Archive folder.
     - The choices are 1 month, 3 months, 6 months, 1 year or 7 years (default).
     - For example, if the setting is 7 years and there is a message that was moved

into the Archive folder 6 years and 11 months ago, it will automatically be moved into the Trash folder in another month.

? **Keep items in Trash for**
- Use this setting to "automatically" remove items from the Trash folder after a specified period of time from when the item was placed in the Trash folder.
- The choices are 1 month, 3 months, 6 months, 1 year or 7 years (default).
- Removing an item from the Trash folder means the item can no longer be seen.
- For example, if the setting is 7 years and there is a message that was moved into the Trash folder 6 years and 11 months ago, it will no longer be visible in another month.
- Using the above examples (7 years in each setting) the item will no longer be visible after 21 years from the date it was sent (assuming it wasn't manually moved between folders).

NOTE: the "Keep items..." settings do not affect items in the Inbox folder.

? **Idle time until automatic logout**
- Specify the number of minutes of inactivity before a user is automatically logged out of the application. The default is 60 minutes. The maximum is 1440 minutes (24 hours).

? **Download messages as**
- Choose the file type to use when downloading messages and attachments (PDF or TIFF). The method selected applies to all users at the practice. The menu prompt will change based on the selection (Download as PDF or Download as TIFF).

4. Click **Save.**

Exclude Inactive Patients and Contacts When Searching

Location: Admin

You need Admin privileges to complete this function.

To exclude inactive patients and contacts from being listed in a Search:

1. Click **MENU** > **Admin** > **Practice Settings.**
2. Uncheck **Show inactive patients/contacts when searching**.
3. Click **Save.**

Remove Metadata Page of PDF

Location: Admin

You need Admin privileges to complete this function.

To prevent the metadata page from appending as the last page in PDFs:

1. Click **MENU** > **Admin** > **Practice Settings.**
2. Click on the user.
3. Check the checkbox by **Do not add last page of metadata when generating PDFs**.
4. Click **Save.**

User Management

This section walks you through the steps to define your practice users.

Manage Users

Location: Admin

	You need Admin privileges to complete this function.

	Be sure to set the time zone otherwise it could adversely affect many features.

To add a user:

1. Click **MENU** > **Admin** > **Users**.
2. Click **New**.
3. On the **User Information** tab, enter:
    - **First Name**
    - **Last Name**
    - **Username**
    - **Password**
        - Must be at least 8 characters (maximum of 30 characters)
        - Must have at least one upper case letter
        - Must have at least one lower case letter
        - Must have at least one number or special character
        - Must not contain user name
    - **Confirm Password**
    - **Updox Email**
    - **Direct Address**
    - If this user needs access to the Admin functionality, click the **Admin** checkbox.
    - If this user is the Updox Account Holder, click the **Account Holder** checkbox.
    - If using Faxing, select a default fax coversheet to use when the user sends faxes (optional).
4. In the Direct Messaging Provider Directory section, enter (optional):
    - **Specialty Classification**
    - **Specialization** (this is a sub-category of the Specialty Classification)
    - **National Provider ID (NPI)**
5. If the user does not want to be listed in the provider directory, select **Provider Directory Opt-out**.
6. On the Settings tab.
    - Change the default settings as needed.
7. On the Notifications tab.
    - To notify this user by email upon receipt of items in Updox, select the applicable type(s), then,
    - Enter the user's email address.
8. Click **Save**.

To change a user:

1. Enter the user's name in the search/filter box.
2. Click on the user.
3. Change the values as needed.
4. Click **Save.**

To inactivate a user you no longer need:

1. Enter the user's name in the search/filter box.
2. Click on the user.
3. Uncheck **Active**.
4. Click **Save.**

Direct Messaging Management

This section provides an overview of Direct messaging walks you through the steps to configure for your practice.

Updox Direct Messaging Policies

- **Updox HISP Practices Statement**
- **Updox Certificate Practices Statement**

What is Direct Messaging?

Direct messaging is an easy-to-use, fast and secure electronic communication service for clinical providers and others who regularly transmit and/or receive patient protected health information (PHI). Direct looks and operates like email, but with security features such as point-to-point encryption and electronic security certificates.

Direct is not a brand name or a company, Direct is a transmission standard developed by the Office of the National Coordinator for Health Information Technology (ONC) and is one of the requirements in the federal Meaningful Use program.

Direct messaging must only be used for healthcare purposes.

What is DirectTrust?

DirectTrust is a non-profit health care industry alliance that establishes and maintains rules, standards, and policies associated with the operation of the security and trust-in-identity layer for Direct exchange.

Security is the key component that distinguishes Direct messaging from regular email. In order to exchange Direct messages both parties must swap security certificates and be assured all the parties are “who they say they are”.

Security and trust are musts when transmitting healthcare information!

DirectTrust is also a nationwide network of accredited Health Information Service Providers (HISPs). These accredited HISPs enable hundreds of thousands of users (doctors, nurses, and administrative staff) across the country to freely exchange health information with each other without having to establish a point-to-point security relationship.

To become an accredited member of DirectTrust, a HISP must meet a stringent set of security requirements and procedures which are verified through a 3rd party auditing firm called EHNAC (Electronic Healthcare Network Accreditation Commission).

Individuals become a part of this network after completing the DirectTrust Activation (identity verification) process and receiving their Direct address.

The DirectTrust Activation process is part of the initial implementation of your Direct messaging application and only takes a few minutes.

Most often, only one provider at the medical practice (the representative) needs to go through this process. That person, in turn, is responsible to ensure anyone given a Direct address at the practice is "who they say they are". Typically, a person's identity is verified during the hiring process so no further action is needed by the representative (e.g. I9 Employment form, copy of passport or driver's license). However, some EHR vendors prefer to have each person go through the DirectTrust identity verification process to establish an even higher level of security.

DirectTrust Activation

The DirectTrust Activation enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network. Without this step you can only exchange Direct messages within your practice.

Security is the key component that distinguishes Direct messaging from regular email. In order to exchange Direct messages both the sender and receiver need to validate "who they say they are". This is accomplished by verifying the identity of each user before issuing a Direct address to them.

Direct messaging must only be used for healthcare purposes.

Address Method - DirectTrust Activation Overview

The DirectTrust Activation enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network. Without this step you can only exchange Direct messages within your practice.

Key Points

- The DirectTrust Activation process is mandatory to enable Direct messaging with external users.
- The identity verification pertains to a human not a company.
- The information is kept secure via encryption.

Purpose

The DirectTrust Activation process is part of the initial implementation of your Direct messaging application and only takes a few minutes. This process enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network.

Security is the key component that distinguishes Direct messaging from regular email. In order to exchange Direct messages both the sender and receiver need to validate "who they say they are". This is accomplished by verifying the identity of each user before issuing a Direct address to them.

Identity Verification

Your EHR vendor is using address-level security certificates to ensure the utmost privacy and security. This type of certificate requires that every person receiving a Direct address must complete the DirectTrust Activation process.

Activation Process

The DirectTrust Activation process consists of three parts:

- Government ID verification
- Financial ID verification
- Confirmation code and voice recording

Privacy and Security Assurances
Your information is well protected using encryption, firewalls, and intrusion monitoring. Identity ve
does not effect your credit history; the process simply verifies that the information you provide is t
you. We never see your credit report and we do not keep your Social Security Number or Credit Car

Notes

- All the sections of this process pertain to a single "person". It's that person's identity that is being verified, not the practice.
- If you choose the NPI as your government ID, it must be your individual NPI not the practice NPI.

Address Method - DirectTrust Activation Process

Completing the DirectTrust Activation process takes only a few minutes. During this process, each user will have their identity verified. Upon successful verification, access to other DirectTrust users is activated. There are four sections in this process:

- General Information
- Personal Government ID

- Personal Financial/Utility ID
- Confirmation Code/Voice Recording

Here are a few things to keep in mind:

- Privacy and security are very important. The information is encrypted during transmission and storage, it is used only for identity verification and not for any other purpose.
- All fields are required.
- All fields pertain to the same person.

If you have a freeze on your credit accounts, you must first remove the freeze before completing th process.

Steps

1. To access the DirectTrust Activation web page, follow your software vendor's instructions. You will either access the page from within your software system or you will be given a web address (URL).
2. Read the DirectTrust User Agreement.
3. Read the Experian User Agreement, then click Accept.
4. Enter the practice/company name if not already populated.
5. If prompted, select the HIPAA Healthcare Category for the practice. (Note: You'll only see this prompt when we can't pre-determine your healthcare category under HIPAA.)
    - Business Associate
    - Covered Entity
    - Healthcare Entity
    - Patient
6. Enter the following information:
    - First Name
    - Middle Name (if used in your credit history)
    - Last Name
    - Suffix (if used in your credit history)
    - Home address *(Yes, this must be your home address.)*
    - Date of birth *(mm/dd/yyyy)*
    - Email address
7. Select the ID type for the personal government ID verification:
    - The choices are:
        - Individual National Provider ID *(Don't use a practice NPI.)*
        - Social Security Number
    - Enter the ID number.
8. Select the ID type for the personal financial/utility ID verification.
    - The choices are:
        - Personal Telephone *(Number can be home or cell; don't use a work number.)*
        - Knowledge Questions
    - If telephone or credit card, enter the number.
    - If knowledge questions, select the correct answer for each question.
9. To get the confirmation code:
    - Enter a telephone number where you can be reached now without going through a receptionist or call routing system, then click Call Me.
    - Enter the confirmation code and hit Tab.
    - Follow the audio instructions then hang up the call.
10. Click Verify Identity. *(This button becomes active once all the information is entered).*
11. Verify the information is correct, then click Yes to submit.

Results

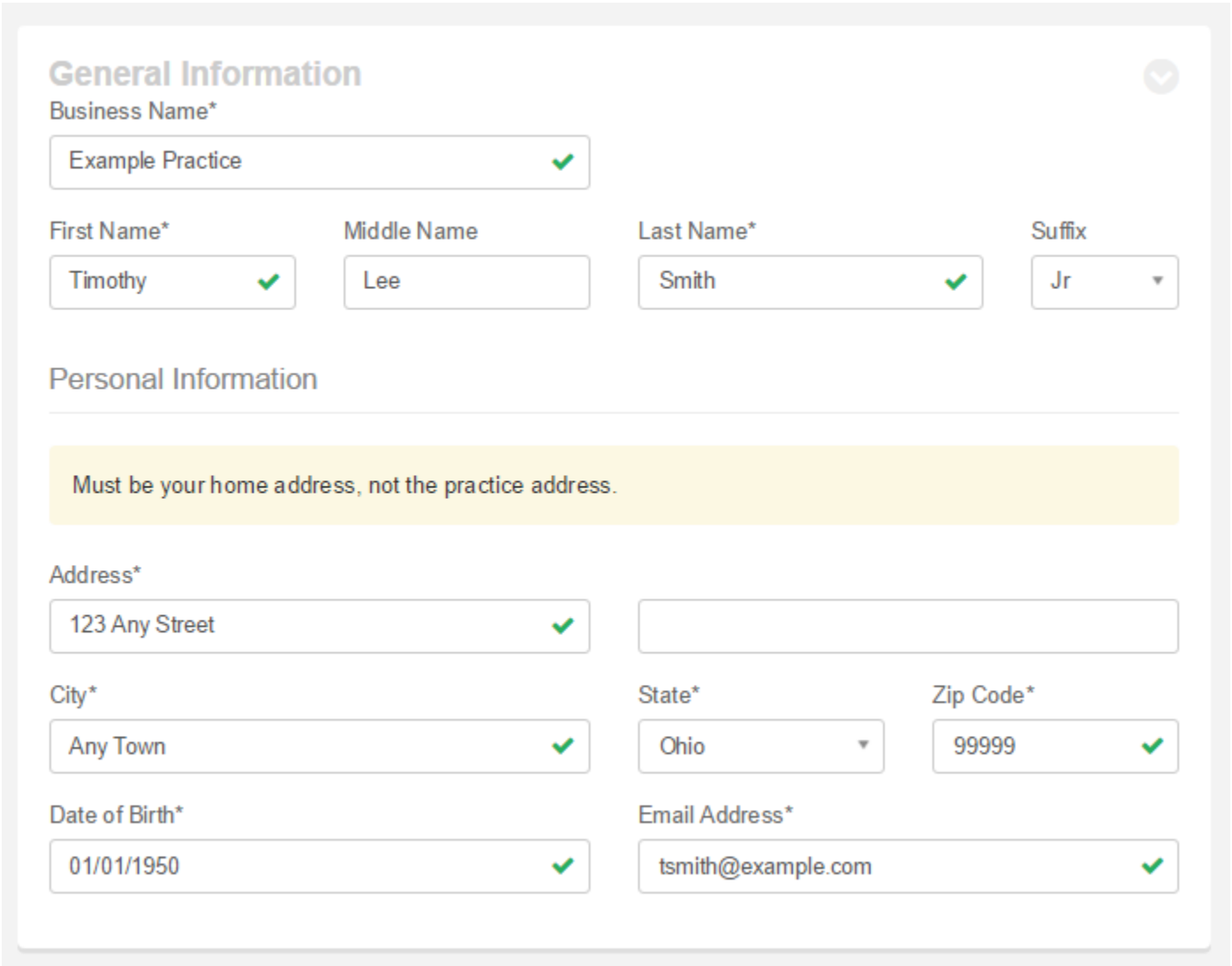
- If all four sections are verified, the activation process is complete.

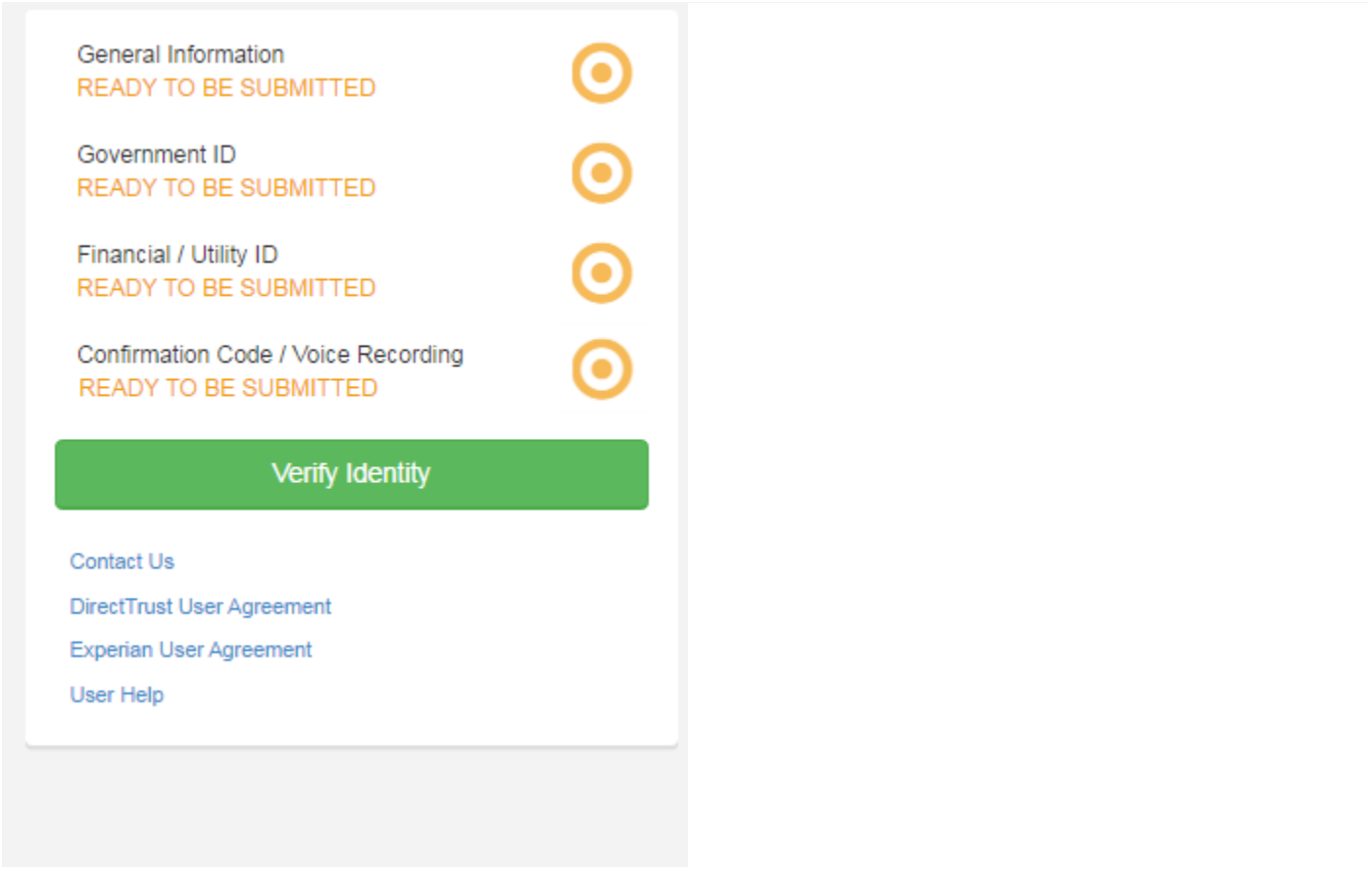
- If any section is not valid:
    - Verify the information entered is correct.
    - To see the failure reason(s), click the information icon *(i)* by each NOT VALID.
    - Make any necessary changes then try again. *(Maximum of 3 tries)*
    - If you need assistance, click Contact Us. *(This link becomes available after the first try.)*

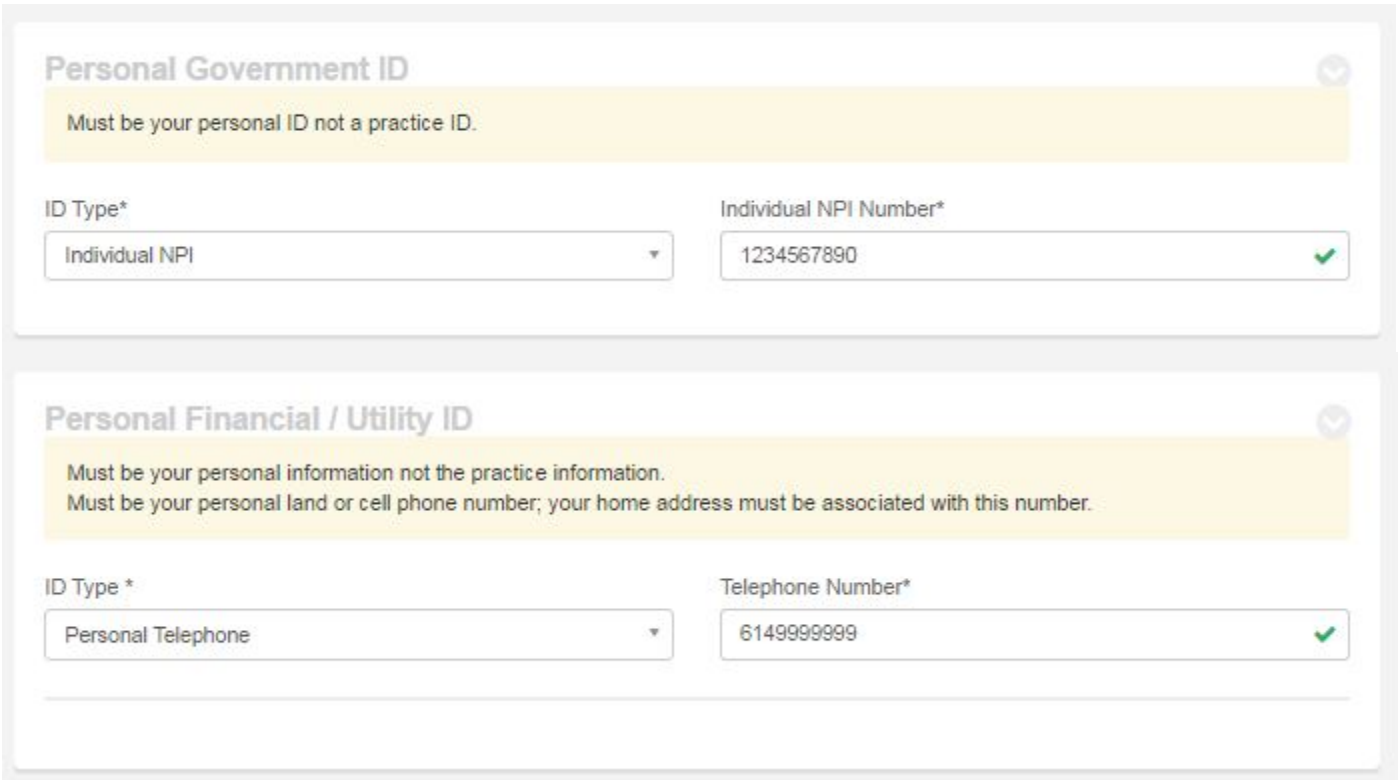
Links

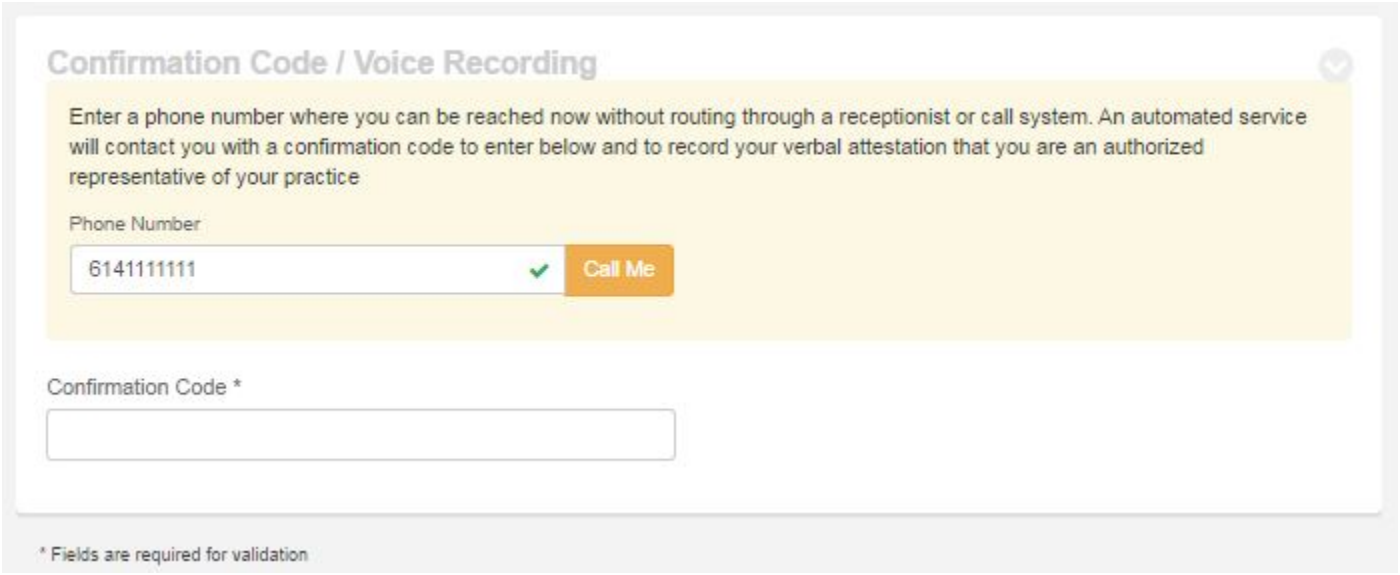
- Contact Us - sends a request to the Updox Support department
- DirectTrust User Agreement - displays the agreement
- Experian User Agreement - displays the agreement
- User Help - displays this documentation

ATTENTION Do you have a freeze on your credit bureau accounts (e.g. Experian)?
If so, do not complete this page yet. Contact the credit bureaus to cancel your freeze, then come back to this page to complete the DirectTrust Activation Process (identity verification). Once finished, you can reactivate your credit freeze.




General Information
READY TO BE SUBMITTED
Government ID
READY TO BE SUBMITTED
Financial / Utility ID
READY TO BE SUBMITTED
Confirmation Code / Voice Recording
READY TO BE SUBMITTED
Verify Identity
Contact Us
DirectTrust User Agreement
Experian User Agreement
User Help


Personal Government ID
Must be your personal ID not a practice ID.
ID Type*
Individual NPI
Individual NPI Number*
1234567890
Personal Financial / Utility ID
Must be your personal information not the practice information.
Must be your personal land or cell phone number; your home address must be associated with this number.
ID Type *
Personal Telephone
Telephone Number*
6149999999



Address Method - DirectTrust Activation User Agreement

The following user agreement is presented at the start of the activation process and is also available for display by clicking the DirectTrust User Agreement link after accepting.

> Updox, LLC. serves as the Health Information Services Provider (HISP) for your practice to enable sending and receiving of Direct messages. Use of this Direct messaging service is governed by the terms and conditions of this agreement.
>
> Security is the key component that distinguishes Direct messaging from regular email. Identity verification is a part of the security framework to ensure that senders and receivers are "who they say they are". As such, before a user is permitted to participate in Direct exchange their identity must be verified.
>
> Your EHR vendor is using address-level security certificates to ensure the utmost privacy and security. This type of certificate requires that every person receiving a Direct address must complete the DirectTrust Activation process. By accepting this agreement:
>
> - You acknowledge that you are compliant with HIPAA privacy and security regulations.
> - You agree to have your identity verified by an external party and to have your verbal attestation recorded.
>
> If you agree to these terms, click Accept.
>
> If you do not agree to these terms, click Decline to exit the process and acknowledge that you will not be permitted to participate in Direct messaging with other users in the DirectTrust network.

Organization Method - DirectTrust Activation Overview

The DirectTrust Activation enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network. Without this step you can only exchange Direct messages within your practice.

Key Points

- The DirectTrust Activation process is mandatory to enable Direct messaging with external users.
- The identity verification pertains to a human not a company.
- The information is kept secure via encryption.

Purpose

The DirectTrust Activation process is part of the initial implementation of your Direct messaging application and only takes a few minutes. This process enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network.

Security is the key component that distinguishes Direct messaging from regular email. In order to exchange Direct messages both the sender and receiver need to validate "who they say they are". This is accomplished by verifying the identity of each user before issuing a Direct address to them.

Identity Verification

Since your EHR vendor is using organizational-level security certificates, only one person (the practice representative) completes the DirectTrust Activation process. That person is then responsible to ensure the practice verifies the identity of other users who will be issued a Direct address. Typically, a person's identity is verified during the hiring process so no further action is usually needed by the representative (e.g. I9 Employment form, copy of passport or driver's license).

Activation Process

The DirectTrust Activation process consists of the following parts:

- General information
- Government ID verification
- Financial ID verification
- Confirmation code and voice recording

Privacy and Security Assurances
Your information is well protected using encryption, firewalls, and intrusion monitoring. Identity ve
does not effect your credit history; the process simply verifies that the information you provide is t
you. We never see your credit report and we do not keep your Social Security Number or Credit Car

Notes

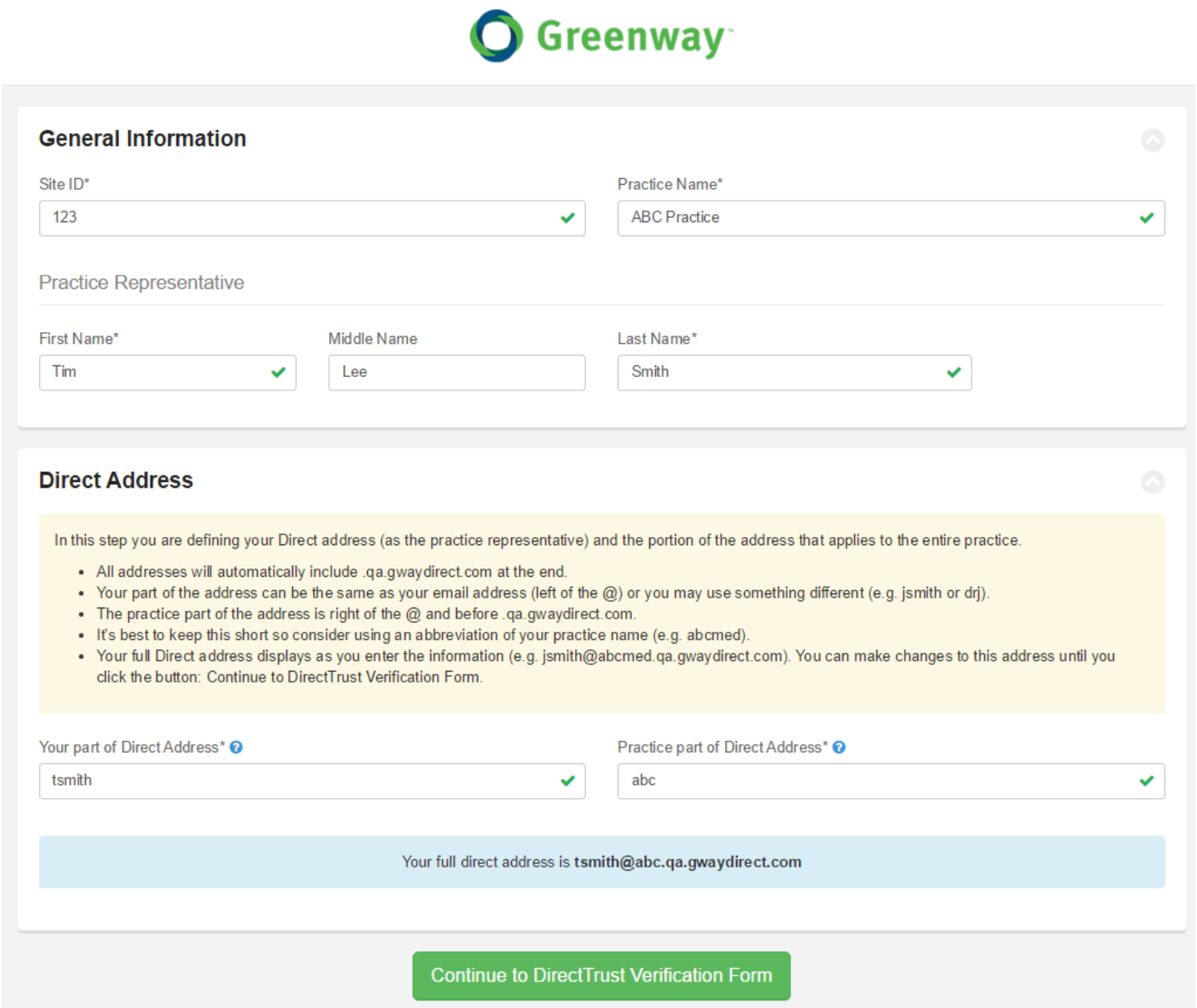
- All the sections of this process pertain to a single "person". It's that person's identity that is being verified, not the practice.
- If you choose the NPI as your government ID, it must be your individual NPI not the practice NPI.
- If the representative leaves the practice, another person needs to assume the role and complete the identity verification process.

Organization Method - Greenway Registration

The first step in the process is to complete the Greenway Registration page. This step configures your practice for Direct messaging, sets the Direct address domain for the entire practice, and adds the Direct address for the practice representative. All fields are required on this form.

Steps

1. To access the DirectTrust Activation web page, follow your EHR vendor's instructions. You will either access the page from within your EHR system or you will be given a web address (URL).
2. Enter the Site ID for the practice. It is crucial this ID be correct. If in doubt, check with Greenway to verify your ID.
3. Enter the practice name.
4. Enter the practice representative's name:
    - First Name
    - Middle Name (if used in your credit history)
    - Last Name
5. In the next two steps you are defining your Direct address (as the practice representative) and the portion of the address that applies to the entire practice.
    - All addresses will automatically include .gwaydirect.com at the end.
    - Your part of the address can be the same as your email address (left of @) or you may use something different (e.g. jsmith or drj).
    - The practice part of the address is right of the @ and before .gwaydirect.com.
    - It's best to keep this short so consider using an abbreviation of your practice name (e.g. abcmed).
    - Your full Direct address displays as you enter the information (e.g. jsmith@abcmed.gwaydirect.com). You can make changes to this address until you complete the next step.
6. Enter your part of the Direct address.
7. Enter the practice part of the Direct address.
8. If the practice part of the address is not available (i.e. already taken by another practice), an error message displays prompting you to enter an alternate choice.
9. When you're ready to complete this part of the setup, click the button: Continue to DirectTrust Verification Form.



Organization Method - DirectTrust Activation Process

Completing the DirectTrust Activation process takes only a few minutes. During this process, the person serving as the practice representative will have their identity verified. Upon successful verification, access to other DirectTrust users is activated (i.e. the security certificate is issued). There are four sections in this process:

- General Information
- Personal Government ID
- Personal Financial/Utility ID
- Confirmation Code/Voice Recording

Here are a few things to keep in mind:

- All fields are required.
- All fields pertain to the same person.
- If the practice representative leaves, the person assuming the role must also complete this identity verification process.

Privacy and Security Assurances
Your information is well protected using encryption, firewalls, and intrusion monitoring. Identity ve
does not effect your credit history; the process simply verifies that the information you provide is t
you. We never see your credit report and we do not keep your Social Security Number or Credit Car

If you have a freeze on your credit accounts, you must first remove the freeze before completing th
process.

Steps

1. To access the DirectTrust Activation web page, follow your EHR vendor's instructions. You will either access the page from within your EHR system or you will be given a web address (URL).
2. Read the DirectTrust User Agreement.
3. Read the Experian User Agreement then click Accept.
4. Enter the practice name if not already populated.
5. If prompted, select the HIPAA Healthcare Category for the practice. (Note: You'll only see this prompt when we can't pre-determine your healthcare category under HIPAA.)
    - Business Associate
    - Covered Entity
    - Healthcare Entity
    - Patient
6. Enter the following information (as the practice representative):
    - First Name
    - Middle Name (if used in your credit history)
    - Last Name
    - Suffix (if used in your credit history)
    - Home address *(Yes, this must be the home address.)*
    - Date of birth *(mm/dd/yyyy)*
    - Email address
7. Select the ID type for the personal government ID verification:
    - The choices are:
        - Individual National Provider ID *(Don't use a practice NPI.)*
        - Social Security Number
    - Enter the ID number.
8. Select the ID type for the personal financial/utility ID verification.
    - The choices are:
        - Personal Telephone *(Number can be home or cell; don't use a work number.)*
        - Knowledge Questions
    - If telephone or credit card, enter the number.
    - If knowledge questions, select the correct answer for each question.
9. To get the confirmation code:
    - Enter a telephone number where you can be reached now without going through a receptionist or call routing system, then click Call Me.
    - Enter the confirmation code and hit Tab.
    - Follow the audio instructions confirming you are the practice representative, then hang up the call.
10. Click Verify Identity. *(This button becomes active once all the information is entered).*
11. Verify the information is correct, then click Yes to submit.

Results

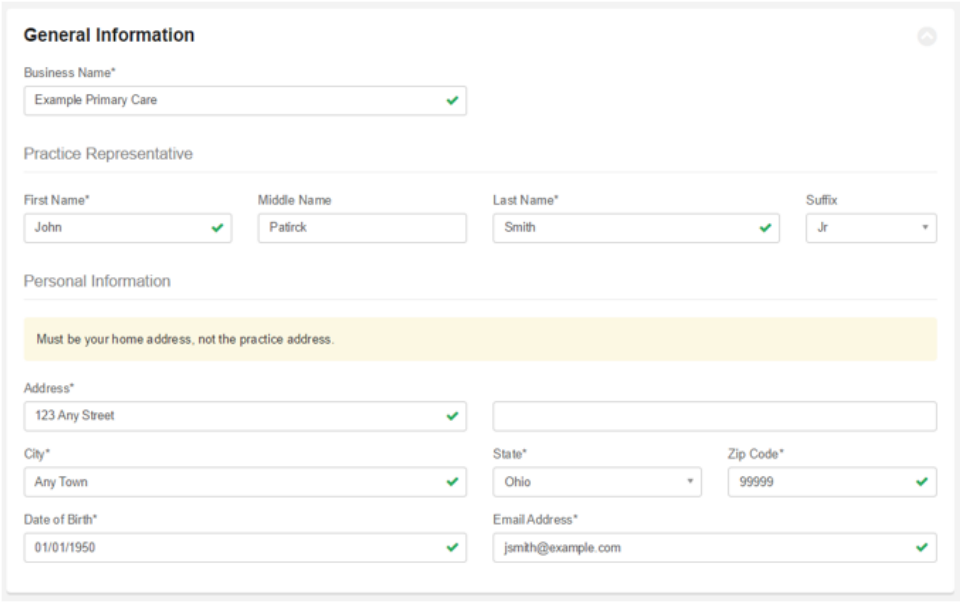
- If all four sections are verified, the activation process is complete.
- If any section is not valid:
    - View the failure reason(s), click the information icon *(i)* by each NOT VALID.
    - Verify the IDs pertain to the individual, not the practice.

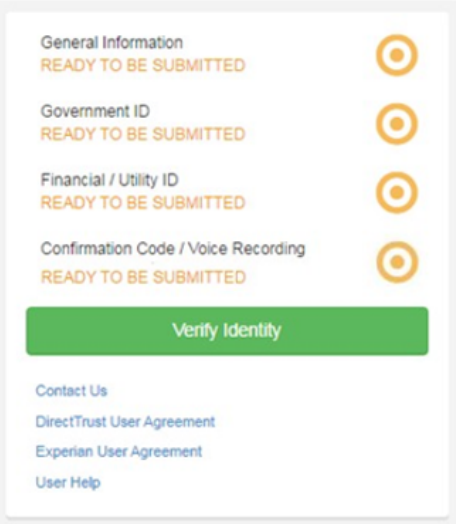
- Verify the information is complete and correct.
- Try the validation with a different ID type and/or number.
- Try the validation with a different user.
- Make any necessary changes then try again. *(Maximum of 3 tries)*
- If you need assistance, click Contact Us. *(This link becomes available after the first try.)*

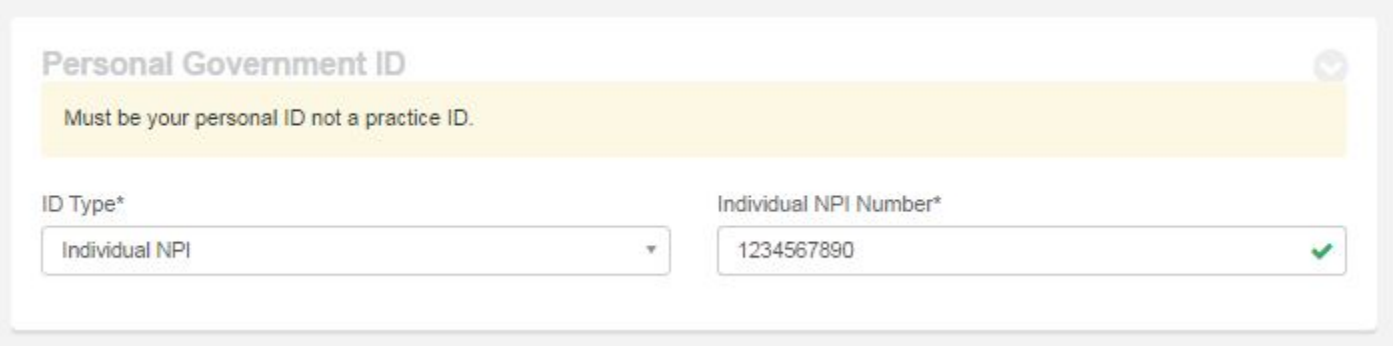
Links

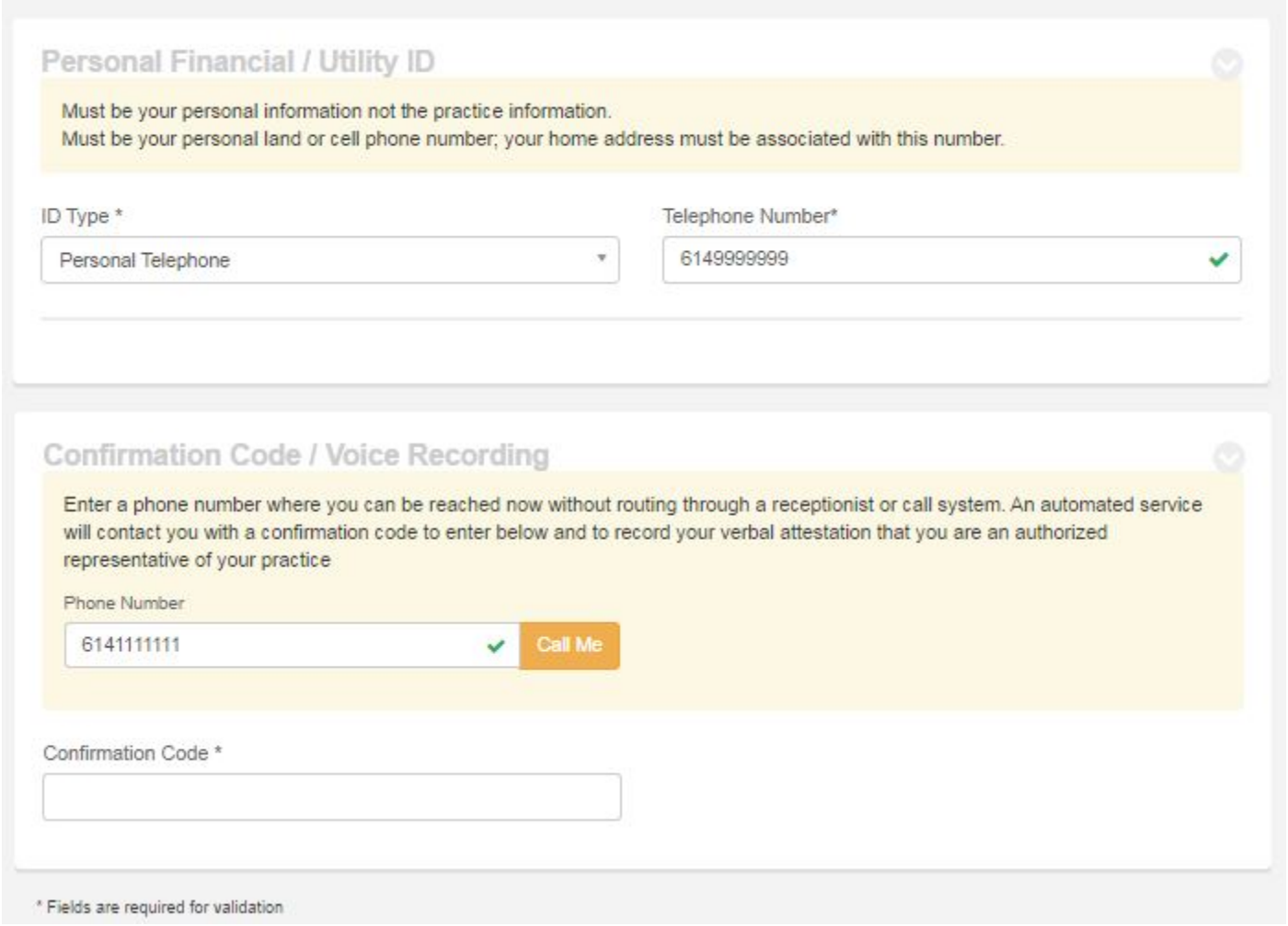
- Contact Us - sends a request to the Updox Support department
- DirectTrust User Agreement - displays the agreement
- Experian User Agreement - displays the agreement
- User Help - displays this documentation

ATTENTION Do you have a freeze on your credit bureau accounts (e.g. Experian)?
If so, do not complete this page yet. Contact the credit bureaus to cancel your freeze, then come back to this page to complete the DirectTrust Activation Process (identity verification). Once finished, you can reactivate your credit freeze.









Organization Method - DirectTrust Activation User Agreement

The following user agreement is presented at the start of the activation process and is also available for display by clicking the DirectTrust User Agreement link after accepting.

Updox, LLC serves as the Health Information Services Provider (HISP) for your practice to enable sending and receiving of Direct messages. Use of this Direct messaging service is governed by the terms and conditions of this agreement.

Security is the key component that distinguishes Direct messaging from regular email. Identity verification is a part of the security framework to ensure that senders and receivers are "who they say they are". As such, one representative from the practice must successfully pass the identity verification process before the practice can participate in Direct exchange.

Accepting this user agreement means that:

- You acknowledge that you are an authorized representative of the practice
- You acknowledge that the practice is compliant with HIPAA privacy and security regulations
- You agree to have your identity verified by an external party and to have your verbal attestation recorded as the practice representative
- You acknowledge that the practice has/will verify the identity of other users before enabling them to participate in Direct messaging exchange such that the following requirements are met:
    - Inspect a photo ID, compare picture to the user, and record the ID number
    - Verify the user's name, date of birth, and address through record checks with the applicable

agency, credit bureau, state licensure board, e-prescribing authority, or similar database.
- You agree to keep proof of each user's identity for at least 7 1/2 years after their employment ends.
- Upon request, you agree to provide documented proof of a user's identity verification to Updox for auditing purposes. You also acknowledge that failure to provide this information may result in the revocation of your Direct messaging credentials.

If you agree to these terms, click Accept.

If you do not agree to these terms, click Decline to exit this process and acknowledge that your practice will not be permitted to participate in Direct messaging with other users in the DirectTrust network.

Organization Method - View/Change Practice Representative

Location: Admin

To view/modify practice information you must have Admin privileges.

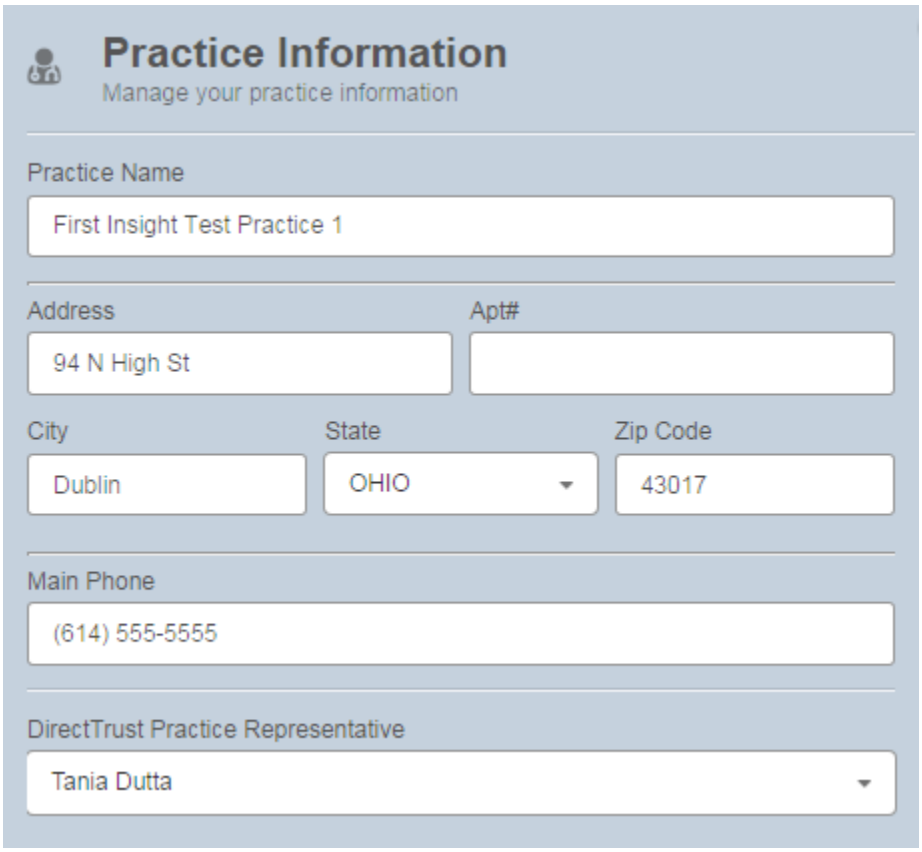
As part of the Direct messaging setup, a representative of the practice completes the DirectTrust activation which includes verifying the person's identity. This person is then responsible to ensure the practice verifies the identity of other users who will be issued a Direct address.

To view who is currently assigned as the practice representative:

1. Go to Admin > Practice Information.
2. Their name is in the DirectTrust Practice Representative field.

To change who is currently assigned as the practice representative:

1. The new representative must first complete the DirectTrust Activation process.
2. Go to Admin > Practice Information.
3. Ensure their name is selected in the DirectTrust Practice Representative field. If not, click the down arrow in that field and select the new person serving as the representative.



Experian User Agreement

The following user agreement is presented at the start of the activation process and is also available for display by clicking the Experian User Agreement link after accepting.

> You understand that by clicking the ACCEPT button immediately following this notice, you are providing 'written instructions' to Updox under the Fair Credit Reporting Act authorizing Updox to obtain information from your personal credit profile or other information from Experian. You authorize Updox to obtain such information solely to confirm your identity for participation in the DirectTrust network.

Tag Management

This section walks you through the steps to configure tags for your practice.

What are Tags?

Tags are a colorful way to organize items in the Updox Inbox. That visual splash of color can draw your attention without needing to read the subject or open the item. You can even limit which items are shown in your workspace by filtering by the tag color.

The name (and hence the meaning) of each color can be set by a user with Admin privileges. Any user can assign a tag to an item in their workspace.

Here are some example ways to use the tags. Each color could represent a different:

- healthcare provider (e.g. Dr. Smith, Dr. Jones)
- department (e.g. front desk, lab)
- purpose (e.g. prescription refill request, a care summary (CCD) received from an external provider, a message from the patient portal)
- priority (e.g. red = high priority)

What other ways can you think of to use tags?

You can filter and sort items in the workspace by tags.

Manage Tags

Location: Admin

You need Admin privileges to complete this function.

Tags can be used to organize and/or flag items. Use this function to rename, add, and remove tags. You can have up to 49 tags.

1. Click **MENU** > **Admin** > **Tags**.
2. To rename a tag:
    - Click in the textbox by the tag
    - Enter a new name
3. To add a tag:
    - Scroll to the bottom of the tag list
    - Click **Add Tags**
    - Click the checkbox by the tag
    - Enter a new name
    - Click **Add Selected Tags**
4. To remove a tag:
    - Scroll to the bottom of the tag list
    - Click **Remove Tags**
    - Click the **X** by one or more of the existing flags
    - Click **Done Removing**
5. When finished, click **Save.**
6. Refresh your screen.

Template Management

This section walks you through the steps to configure templates for your practice.

Manage Templates

Location: Admin

Templates enable you to more quickly compose emails and patient portal messages by pulling in pre-defined text.

	You need Admin privileges to complete this function.

To add a Template:

1. Click **MENU** > **Admin** > **Templates**.
2. Click **New**.
3. Enter the Title.
4. Check **Active**.
5. Enter the information to include in this template. Use the text editing tools to format.
6. Click **Save**.

To change a Template:

1. Click **MENU** > **Admin** > **Templates**.
2. Click on the template to change.
3. Enter your changes. Use the text editing tools to format.
4. Click **Save**.

To inactivate a Template:

1. Click **MENU** > **Admin** > **Templates**.
2. Click on the template to inactivate.
3. Uncheck **Active**.
4. Click **Save**.

Text Editing Tools	
	Bold the selected text.
	Italicize the selected text.
	Strikethrough the selected text.
	Underline the selected text.
	Undo.
	Redo.

Printer Management

This section walks you through the steps to configure virtual printers for your practice.

Add a Virtual Printer

Location: Your Computer

You can easily transfer documents from your computer into your Workspace by printing to an Updox virtual printer. The steps to add a virtual printer vary depending on your computer's operating system.

Microsoft Windows

1. Open the Windows **Control Panel** (can be found under the Start menu).
2. Open the printers screen.
    - In Windows XP this section is called **Printers and Faxes**.
    - In Windows Vista this section is called **Printers**
    - In Windows 7 and Windows 8 this section is called **Devices and Printers**
3. Click the **Add a Printer** button (In Windows 8 click **The printer that I want isn't listed**).
4. Select add a **local printer**.
5. Uncheck the **Automatically detect and install**... checkbox, if present.
6. Click **Next**.
7. Indicate you want to use an **existing port**.
8. For the port, choose **Updox_9100** (if not listed, see the instructions below).
9. Click **Next**.
10. For the Manufacturer, select **HP**.
11. For the Printer, select one of the following (if the printer isn't listed contact Updox Support for assistance):
    - Windows XP : **HP ColorLaserJet 5/5M PS**
    - Windows Vista: **HP ColorLaserJet 5/5M PS** or **HP ColorLaserJet 2800 Series PS**
    - Windows 7 : **HP ColorLaserJet 5/5M PS** or **HP ColorLaserJet 2800 Series PS**
    - Windows 8 : **HP ColorLaserJet 2800 Series PS** or **HP ColorLaserJet 3800 PS Class Driver**
12. Click **Next**.
13. If asked, click **Keep existing driver or Use the driver that is currently installed**.
14. Enter the name of this virtual printer (e.g. Updox).
15. Depending on your version of Windows, you may also be asked the following questions (the order may vary):
    - **Make this the default printer?** Click, **No**. (most common)
    - **Share this printer?** Click, **No.** (most common)
    - **Print a test page?** Click **Yes**.

Updox_9100 Port Isn't Listed

If Updox_9100 isn't an existing port, then:

- Select the **Create new port** option (instead of Use existing port).
- For Type of Port, select **Standard TCP/IP**.
- Click **Next**.
- For the Printer Hostname or IP Address, enter **localhost**.
- For the Port Name, enter **Updox_9100**.
- Uncheck the **Query the printer**... checkbox (if present).
- Click **Next**.
- Windows will try (unsuccessfully) to detect the printer.
    - This usually takes 30-40 seconds.
    - It will state it was unable to detect the device and that additional port information is needed.
- Click the **Custom** option checkbox (you do not need to click the Settings button).
- Click Next (on Windows XP, also click Finish) to return to the printer setup.
- Resume the Windows Virtual Printer setup at Step 10 above.

OS X (Mac)

1. Open a web browser and go to http://myupdox.com/files/UpdoxPrinterSetup.zip to download the Mac

Printer application.

2. Click on the downloaded file named “Updox Printer Setup” to unzip. Double-click to Open with Archive.
3. Click on the unzipped file to begin installation
4. Set the name to "Updox Printer" (or something similar).
5. To test, open an item on your computer, select Print, then choose the newly created Updox Printer. Enter your ** Updox username and password (check box to save credentials to Keychain)

   Note: Practice Fusion users: In Updox, go to Menu, Profile. Scroll down to the section Printer Credentials. If there are no values in the Printer Login and Printer Password, click the Generate button to populate these fields. Use the Printer Login as your Username and Printer Password as your Password in Step 5.

Updox Internet Printing Protocol (IPP) Printer

In some situations we may recommend you install an Updox Internet Printing Protocol (IPP) printer. In that case you the following steps:

Microsoft Windows

Open the Windows **Control Panel** (can be found under the Start menu).

1. Open the printers screen.
   - In Windows XP this section is called **Printers and Faxes**.
   - In Windows Vista this section is called **Printers**
   - In Windows 7 and Windows 8 this section is called **Devices and Printers**
2. Click the **Add a Printer** button (In Windows 8 click **The printer that I want isn't** listed and skip step 6).
3. Select **Add a network, wireless or Bluetooth printer** (not a local printer).
4. Click **The printer that I want isn't listed.**
5. Click the **Select a shared printer by name** option.
6. In the available field type **https://myupdox.com/api/printer**.
7. A new window pops up and asks for the Network Password.
   - User Name - enter your Updox User Name.
   - Password - enter your Updox password.
   - Click OK.
8. For the Manufacturer, select **HP**.
9. For the Printer, select one of the following (if the printer isn’t listed contact Updox Support for assistance):
   - Windows XP : **HP ColorLaserJet 5/5M PS**
   - Windows Vista: **HP ColorLaserJet 5/5M PS** or **HP ColorLaserJet 2800 Series PS**
   - Windows 7 : **HP ColorLaserJet 5/5M PS** or **HP ColorLaserJet 2800 Series PS**
   - Windows 8 : **HP ColorLaserJet 2800 Series PS** or **HP ColorLaserJet 3800 PS Class Driver**
10. Click **Next**.
11. The printer name will default to **Updox on https://myupdox.com** and cannot be changed.
12. Depending on your version of Windows, you may also be asked the following questions (the order may vary):
    - **Make this the default printer?** Click, **No**. (most common)
    - **Print a test page?** Click **Yes**.
13. Click **Finish** to complete the printer setup.

Printer User Mapping

Location: Admin

You need Admin privileges to complete this function.

One of the ways to upload a document to the Inbox is by printing it using a 'virtual printer'. By default, the documents will be printed to the 'Practice Inbox' which means all users can see the documents. If a user's printed documents should be sent to their private Inbox or to a specific Queue, use the Printer User Mapping function to specify where a user's documents should be printed.

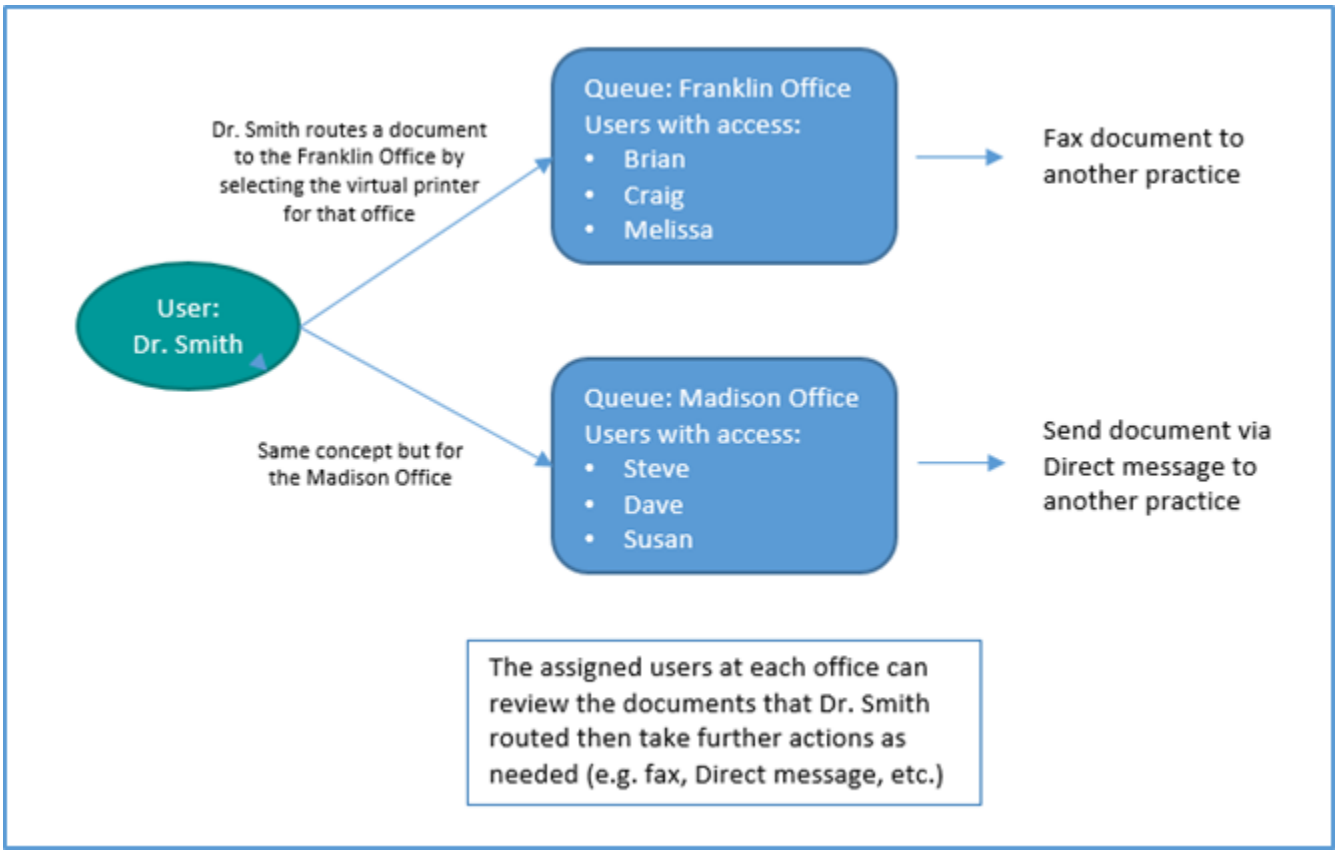
To use Printer User Mapping:

1. Click **MENU** > **Admin** > **Printer User Mapping**.
2. In the bottom left column, enter the user's name in the **Add a new Printer User here...** text box.
3. Click **ADD NEW USER**.
4. In the **Updox Users** column (on the right), find the corresponding Updox user or queue name. Either scroll through the list or enter the name in the **Type here to filter...** box.
5. Next drag and drop the name from the **Updox Users** column (right) into the box under the **Mapped Updox User** column (left).
6. If the Updox user doesn't exist yet you can add them from this screen:
    - In the **Printer Users** column (on the left), enter the user's name in the **Add a new Printer User here...** text box.
    - A box appears under the **Mapped Updox User** column.
    - Click in the box to add the user.
    - When you're finished with the printer mapping go to the **User management** function to finish setting up the new Updox user.
7. Repeat steps 2 through 6 for each user to map.
8. When finished, click **SAVE**.

Print to Queues

Location: Admin

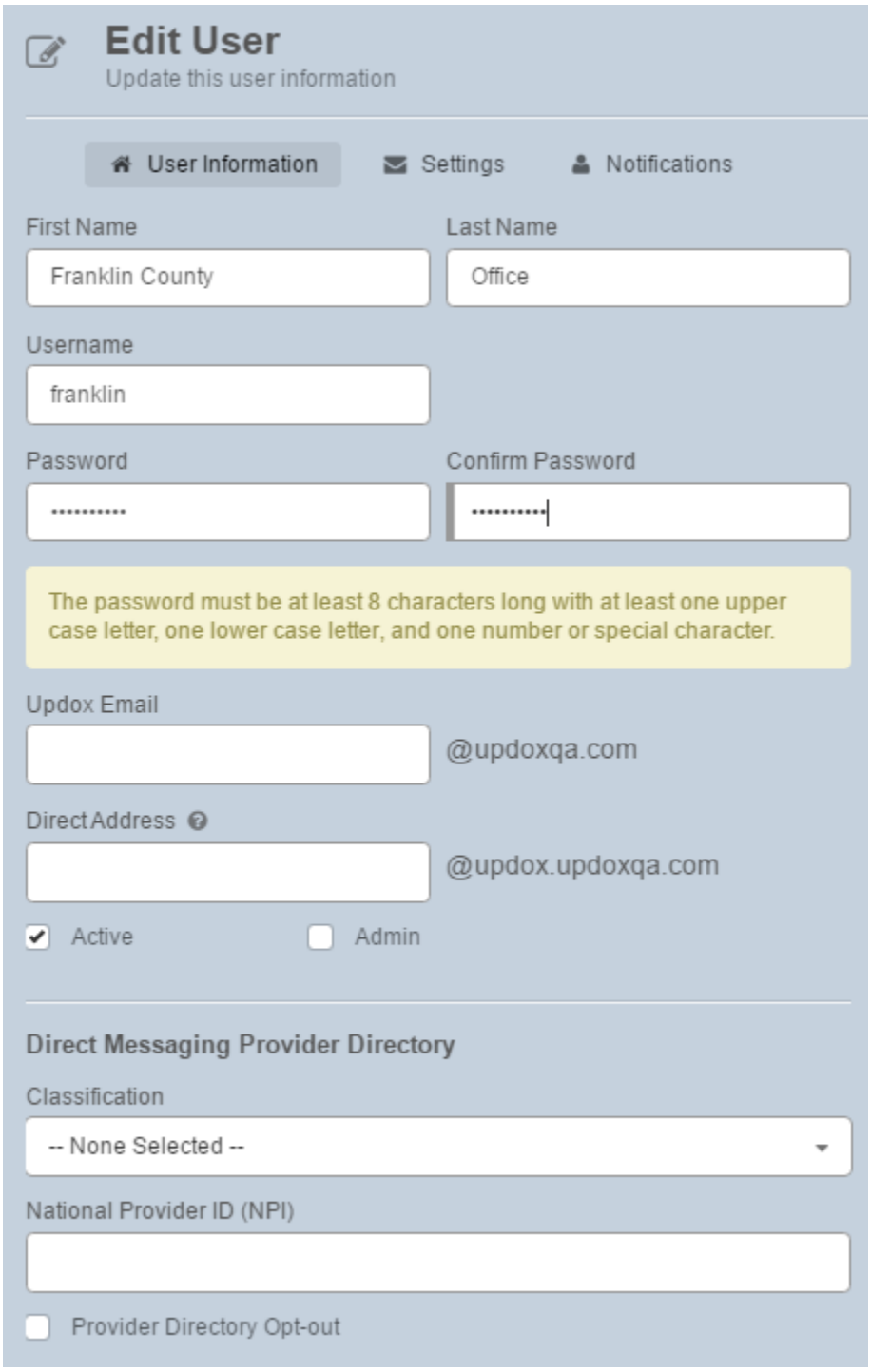
By using virtual printers you can upload/route documents to specific queues that select users can access. In the following workflow example, Dr. Smith has two virtual printers configured, one for the Franklin location and one for the Madison location.



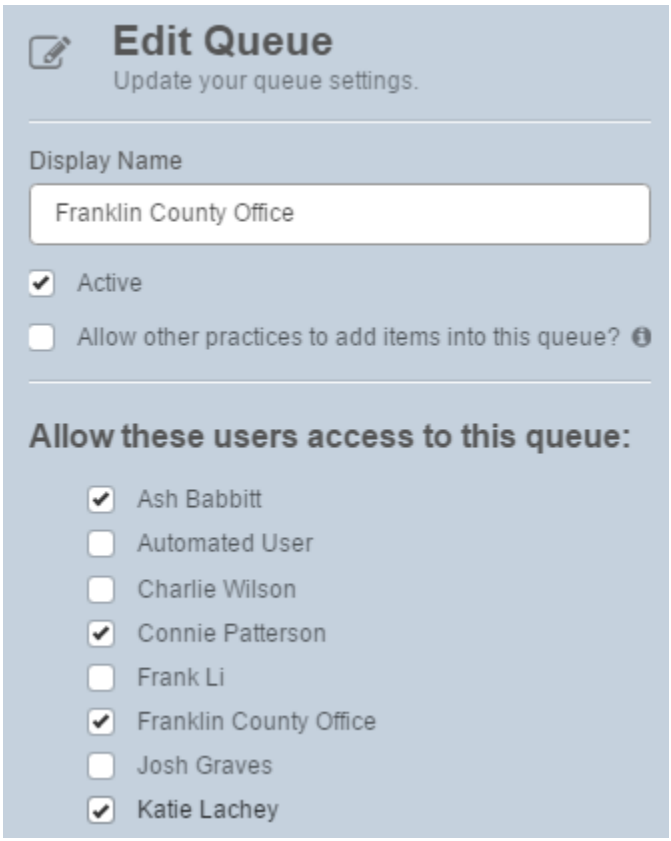
PLEASE NOTE: The users who 'monitor' the queue may not be the same users who 'print' to that queue. Some may do both.

Setup Steps for IPP Printers:

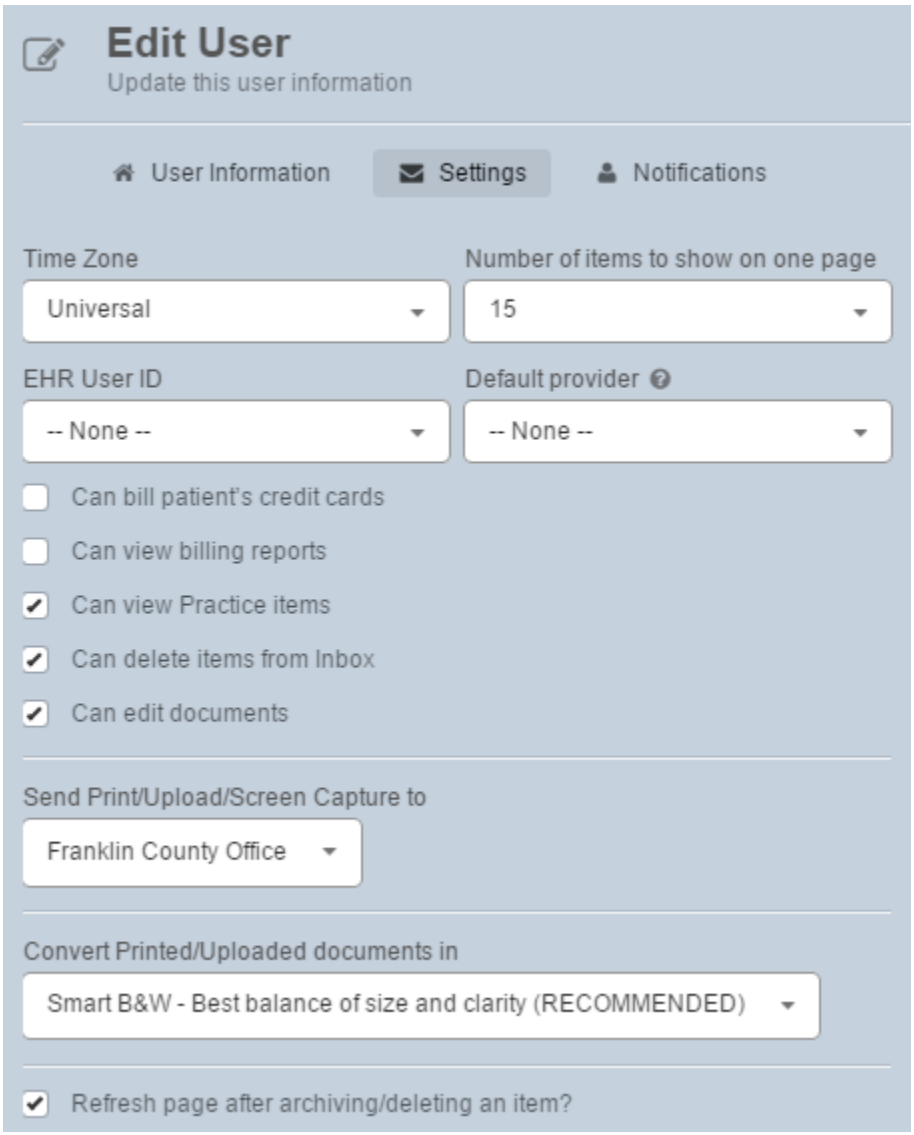
1. **Add a user** that represents a department/location/etc. where you want to print documents.



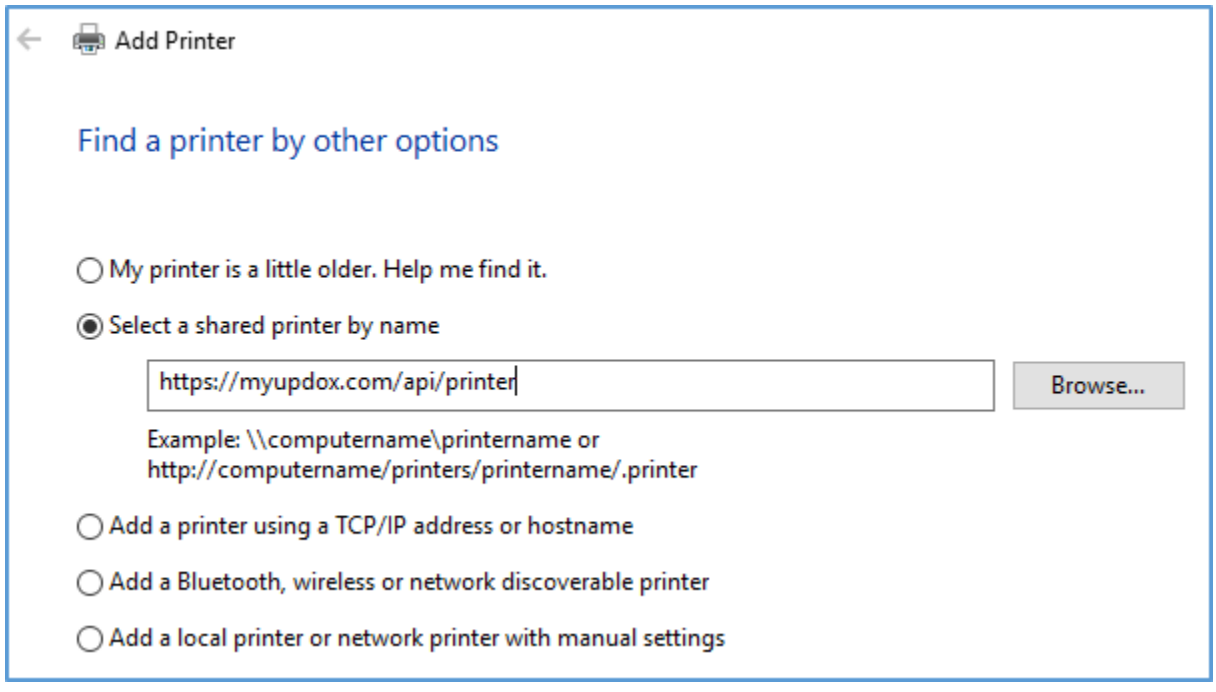
2. **Add a Queue** for the same department/location and select the users that will need access to the queue, including the user you added in the step above.



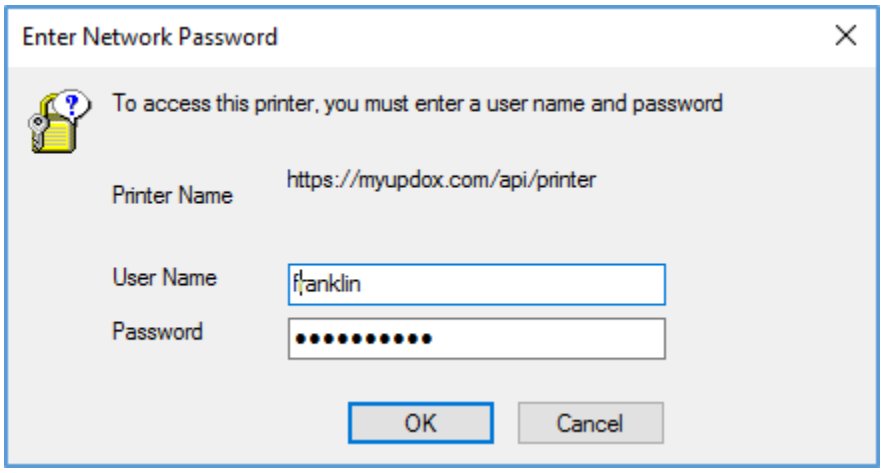
3. Refresh your browser screen (or sign out and back in).
4. **Update the User** created in step 1 to route printed documents to the Queue created in step 2. Click the Settings tab, in the **Send Print/Upload/Screen Capture to** field select the Queue you created.



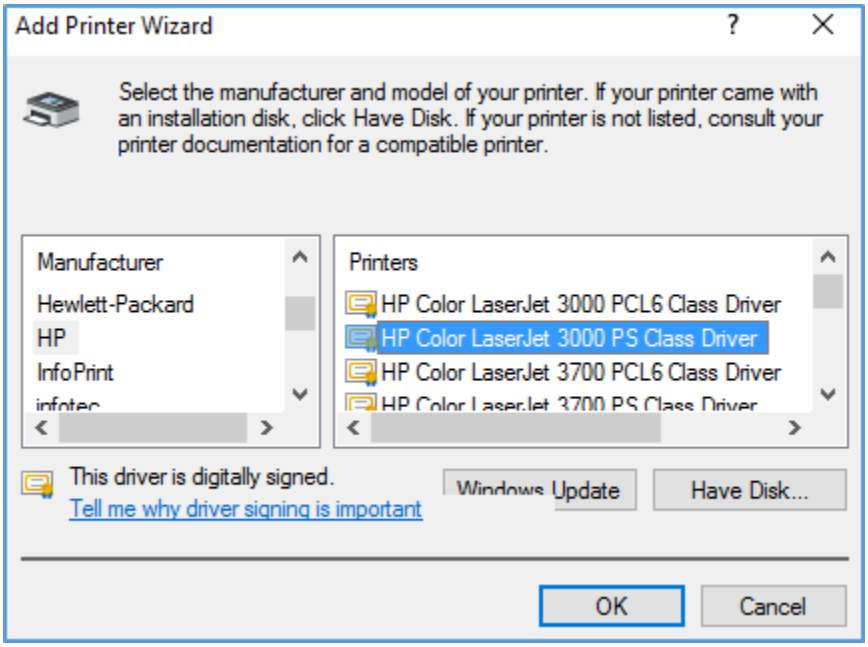
5. Add the IPP printer. See the instructions at:
http://support.updox.com/customer/en/portal/articles/104908-creating-an-updox-printer



5. When prompted for a username and password, enter the credentials of the user created in step 1.



5. Select the printer driver as specified in the instructions.



Setup Steps for Central Printers:

1. **Install Updox Central.**
2. **Add a Central Printer**.
3. **Complete the Printer User Mapping**.
4. **Add a Queue** that will receive the documents printed to it (e.g. Medical Records Queue).
5. **Update User Settings** for the users that will print documents to the Queue created in Step 4. Click the Settings tab, in the **Send Print/Upload/Screen Capture to** field select the Queue you created.

Queue Management

This section walks you through the steps to configure queues for your practice.

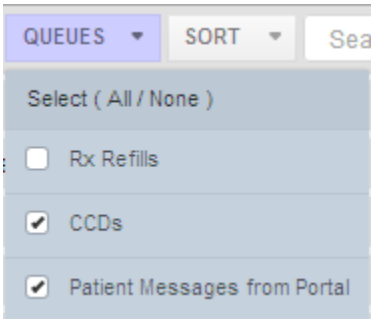
What are Queues?

Queues are like file folders; they provide a way to organize items in your Workspace, help you manage workflows, and enable you to share access with multiple users.

Here are some ideas for using queues:

- Organize items by department
  - Front Desk
  - Lab
  - Medical Records
  - Billing
- Organize items by type
  - Faxes
  - Incoming referrals (CCD)
  - Messages from the patient portal
- Organize items by user profession
  - Doctors
  - Nurses
  - Administration
- Organize items by the task to be done
  - To be reviewed
  - To be followed-up
  - To be saved in the EHR

When a user has access to multiple queues they can use the Workspace queues filter to limit the items shown.



To send an item to a queue:

1. Click on an item in the Workspace.
2. Click the **Send Item** button.
3. Enter the name of the queue in the **Search** box.
4. In the Search results window click on the queue then click **OK**.
5. Optionally, you can enter a **Subject** and/or **Notes** to send with the item.
6. Click **Send**.

Manage Queues

Location: Admin

You need Admin privileges to complete this function.

To add a Queue:

1. Click **MENU** > **Admin** > **Queues**.
2. Click **New**.
3. Enter a **Display Name**.
4. Click on each user you want to have access to the queue.
5. Click **Save**.

To change a Queue:

1. Click **MENU** > **Admin** > **Queues**.
2. Click the queue to change.
3. Change values as needed.
4. Click **Save**.

To change which users can access a queue:

1. Click **MENU** > **Admin** > **Queues**.
2. Click the queue to change.
3. Select and/or unselect users to change who has access.
4. Click **Save**.

To inactivate a Queue:

1. Click **MENU** > **Admin** > **Queues**.
2. Click the queue to inactivate.
3. Uncheck **Active**.
4. Click **Save**.

If you want to allow other practices linked by Updox Free Secure Messages to add items to this queue, click the checkbox for **Allow other practices to add items into this Queue**. If you need more information contact Updox Customer Support.

Updox Central Management

This section walks you through the steps to configure Updox Central for your practice.

Find the Integration Key

Location: Admin

You need Admin privileges to complete this function.

To find the integration key:

1. Click **MENU** > **Admin** > **Practice Information**.
2. The integration key is shown at the bottom.

Install Updox Central

Location: Updox Central

The Updox Central is an optional application that enables you to:

- Automatically upload documents or faxes from a centralized folder at your practice into Updox
- Use a virtual printer to upload documents into Updox

Updox Central is required for some EHR software systems that are more tightly integrated with Updox.

You need to have access to the Admin menu in Updox to obtain your integration key.

Updox Central is normally installed on only one computer at your practice.

To install Updox Central:

1. Choose one computer to host Updox Central.
2. Go to that computer, open the web browser, then click here to access the install file (or copy this link into the browser http://myupdox.com/central/setup.exe then click enter).
3. Depending on your web browser you'll either be prompted to **Run** the file or **Download** the file then run it.
4. When the Install Wizard opens follow the instructions to complete the installation. This process will place the Updox Central icon on your computer desktop.
5. If the Updox Central user interface doesn't open after the installation is complete, double click the desktop icon.
6. Go to the Updox web application to find the integration key for your practice:
    - Click **MENU**.
    - Click **Admin**.
    - Click **Practice Information**.
    - Copy the value in the **Your integration key is** field.
7. Go back to Updox Central:
    - Paste (or enter) the integration key.
    - Check the box for **Run Updox Central as a Service**.
    - To enable using a virtual printer to upload documents into Updox:
        - Check the box for **Enable Printer**.
        - For details on the printer installation, refer to the Install a Virtual Printer article.
    - To automatically load files from a Non-Fax Server location:
        - Click the **Files** tab.
        - Check the box for **Enable File Auto-Upload Folder**
        - Select the location of an existing folder for Updox Central to monitor.
        - Click **OK**.
        - If you want to limit which file types can be uploaded, enter the file extension(s) in **File types to upload** field (e.g. pdf, docx, etc.). Leaving the field blank enables all file types.
    - To automatically load files from a Fax Server:

- Click the **Files** tab.
- Check the box for **Enable Fax Auto-Upload Folder**
- Select the location of an existing folder for Updox Central to monitor. (Note: must be a different folder than the one chosen for the Enable File Auto-Upload Folder.)
- Click **OK**.
- If you want to limit which file types can be uploaded, enter the file extension(s) in **File types to upload** field. Leaving the field blank enables all file types.

8. To exit Updox Central, click **Close**.

Install Save to Disk Plugin

Location: Updox Central

Before installing the Save to Disk plugin:
- Verify Updox Central is installed.
- If the Updox-Sync/Updox Connector is installed, uninstall it.

To install the Save to Disk plugin:

1. Go to Updox Central.
2. Click **Plugins** tab.
3. Click **Save to Disk** plugin.
4. Click **Install** button.
5. In the Install pop-up window, choose the file save **folder**.
6. Configure the plugin:
   - **Base Directory** – select the base folder for saving files.
   - **Patient Folder Pattern** – specify the pattern for naming patient folders.
     - Default = Last Initial/Last Name, First Name/Category [LI]/[LN],[FN]/[C]
     - You may change the pattern by using any combination of the pattern variables listed below.
   - **Patient Filename Pattern** – specify the pattern for naming patient files.
     - Default = FirstName LastName – Title Date [FN] [LN] – [T] [D]
     - You may change the pattern by using any combination of the pattern variables listed below.
7. Click **Close**. The Updox Central window reopens.
8. Click **Close** to exit Updox Central.

Pattern Variables

Variable	Name	Information Source
[C]	Category	User chooses when saving the file
[D]	Date	Today's date unless user changes when saving the file
[FN]	First name	Auto set to patient's first name
[LI]	First initial of last name	Auto set to first initial of patient's last name

[LN]	Last name	Auto set to patient's last name
[T]	Title	Use enters when saving the file

The Save to Disk plugin for Updox Central replaces the Updox-Sync/Updox Connector.

Add an Updox Central Printer

Location: Your Computer

You can easily transfer documents from your computer into your Workspace by printing to an Updox virtual printer.

This article is specific to implementations using Updox Central.

The printer must be installed as a local printer on the same computer where Updox Central is installed.

Microsoft Windows

1. Open the Windows **Control Panel** (can be found under the Start menu).
2. Open the printers screen.
    - In Windows XP this section is called **Printers and Faxes**.
    - In Windows Vista this section is called **Printers**
    - In Windows 7 and Windows 8 this section is called **Devices and Printers**
3. Click the **Add a Printer** button (In Windows 8 click **The printer that I want isn't listed**).
4. Select add a **local printer**.
5. Uncheck the **Automatically detect and install**... checkbox, if present.
6. Click **Next**.
7. Indicate you want to use an **existing port**.
8. For the port, choose **Updox_9100** (if not listed, see the instructions below).
9. Click **Next**.
10. For the Manufacturer, select **HP**.
11. For the Printer, select one of the following (if the printer isn't listed contact Updox Support for assistance):
    - Windows XP : **HP ColorLaserJet 5/5M PS**
    - Windows Vista: **HP ColorLaserJet 5/5M PS** or **HP ColorLaserJet 2800 Series PS**
    - Windows 7 : **HP ColorLaserJet 5/5M PS** or **HP ColorLaserJet 2800 Series PS**
    - Windows 8 : **HP ColorLaserJet 2800 Series PS** or **HP ColorLaserJet 3800 PS Class Driver**
12. Click **Next**.
13. If asked, click **Keep existing driver or Use the driver that is currently installed**.
14. Enter the name of this virtual printer (e.g. Updox).
15. Depending on your version of Windows, you may also be asked the following questions (the order may vary):
    - **Make this the default printer?** Click, **No**. (most common)
    - **Share this printer?** Click, **Yes.**

- **Print a test page?** Click **Yes**.

Updox_9100 Port Isn't Listed

If Updox_9100 isn't an existing port, then:

a) Select the **Create new port** option (instead of Use existing port).
b) For Type of Port, select **Standard TCP/IP**.
c) Click **Next**.
d) For the Printer Hostname or IP Address, enter **localhost**.
e) For the Port Name, enter **Updox_9100**.
f) Uncheck the **Query the printer**... checkbox (if present).
g) Click **Next**.
h) Windows will try (unsuccessfully) to detect the printer.
   - This usually takes 30-40 seconds.
   - It will state it was unable to detect the device and that additional port information is needed.
i) Click the **Custom** option checkbox (you do not need to click the Settings button).
j) Click Next (on Windows XP, also click Finish) to return to the printer setup.
k) Resume the Windows Virtual Printer setup at Step 10 above.

Integrate a Scanner to Auto-Upload to Updox

Location: Your Computer

This article is specific to implementations using Updox Central.

You can configure most flatbed scanners or multi-function devices (printer, scanner, fax) to save scanned files to a specific location. By setting that save location to the Updox auto-upload folder scanned items are automatically uploaded into your Updox Workspace.

To integrate the scanner:

1. Log into Updox Central.
2. If Updox Central isn't currently set up to auto-upload faxes:
   - Click the **Files** tab.
   - Check the box for **Enable Fax Auto-Upload Folder**
   - Select the location of an existing folder for Updox Central to monitor. (Note: must be a different folder than the one chosen for the Enable File Auto-Upload Folder.)
   - Click **OK**.
   - If you want to limit which file types can be uploaded, enter the file extension(s) in **File types to upload** field. Leaving the field blank enables all file types.
3. If Updox Central is already set up to auto-upload faxes, look up the folder location:
   a. Click the **Files** tab.
   b. Note the location specified for **Enable Fax Auto-Upload Folder**.
4. Exit Updox Central.
5. Refer to your scanner software documentation for the steps to set the save location to the folder location defined above.

Tag Management

This section walks you through the steps to configure categories for your practice.

What are Categories?

The use of categories varies depending on the EHR software that your practice uses. EHR systems typically use categories to organize documents. For example, there may be a category for Care Summaries or Faxes.

Some EHR systems pre-define which categories you can use; whereas, others may let you define the categories in this application that coincide with the categories you set up in the EHR system.

If your EHR lets you define the categories, you'll select the category to assign during the document import process.

Manage Categories

Location: Admin

This feature is available only if your Electronic Health Record (EHR) software supports category management within Updox.

To manage categories you must have Admin privileges.

1. Click **MENU** > **Admin** > **Categories**.
2. To add a category, enter a name then click **ADD**.
3. To change a category name, simply enter it.
4. To select a default category (so that users won't need to select a category each time they save), check the radio button before an existing category.
5. To delete a category, click the X by the category name.
6. Click **Save**.

System Folder Management

This section walks you through the steps to configure which system generated messages are routed to the System folder.

System Folder Management

Location: Admin

You need Admin privileges to complete this function.

Many functions within the application generate system messages to inform you about various activities. By default, these messages are sent to the Practice Inbox. The System Folder Management function lets you route select message types to the System Folder instead of the Inbox folder. Keep in mind that any items sent to the System folder will no longer generate email notifications.

To manage your system folder:

1. Click **MENU** > **Admin** > **System Folder Management**.
2. Check the box for each message type to route to the System folder. Note: some message types are specific to add-on products (e.g. Scheduling, Reminders, Patient Payments, Fax).
3. Click **Save**.

Message Type	Category
Appointment conflict	Scheduling
Appointment cancel	Scheduling
Appointment confirm	Scheduling
New appointment	Scheduling
Appointment approve	Scheduling
Appointment blackout date cancel	Scheduling
Reminder file upload fail	Reminders
Reminder fail	Reminders
New portal	Patient Portal
Email deliver fail	Email
Direct deliver fail	Direct Messaging
XD deliver fail	Direct Messaging
Portal payment received	Patient Payments
Payment received	Patient Payments
Payment plan created	Patient Payments
Payment plan cancelled	Patient Payments
Payment refunded or void	Patient Payments
Payment cancelled	Patient Payments
Payment plan update	Patient Payments
Payment failed	Patient Payments
Fax deliver failed	Fax
EHR import failed	EHR Import
EHR integration	New Account Instructions
Basic use	New Account Instructions
Complete setup	New Account Instructions
Welcome	New Account Instructions
Vetted member inactive	Direct Messaging
Network invitation	Refer & Share
Portal timeout	Patient Portal
Portal item read	Patient Portal
Portal password reset	Patient Portal
New account	Patient Portal
Broadcast	Patient Portal
Certificate revoke	Direct Messaging
Patient opt back in	Patient Portal

Form Management

This section describes how to add, edit, and inactivate forms.

Do not collect credit card information using forms.
The Payment Card Industry (PCI) has different requirements for storing this type of data.
The **Patient Payments** application is designed to meet these requirements.

Form Management

Location: Admin

The Form Management function lets you create custom forms for use in the Patient Portal, provider Web Application, or both.

- **Patient Portal Forms** - these forms let you collect information from patients and/or caregivers. After the user completes the form it is sent to the practice.
- **Provider Web Application (Internal) Forms** - these forms are completed by practice employees and then transmitted to others using the same methods available under **Compose** (fax, email, Direct message, secure message to the Patient Portal).

You need Admin privileges to complete this function.

Do not collect credit card information using forms.
The Payment Card Industry (PCI) has different requirements for storing this type of data.
The **Patient Payments** application is designed to meet these requirements.

To add a Form:

1. Click **MENU** > **Admin** > **Forms Management.**
2. Click **New Form**.
3. Complete the following fields:
    - **Title** - enter a unique name for the form
    - Form Type - select one or more
        - **Active (Portal)** - this option places the form "within" the Patient Portal (i.e. user must log in to access).
        - **Public (Portal)** - this option places the form on the login page of the Patient Portal (i.e. anyone can access).
        - **Active (Internal)** - this option places the form in the provider's Web Application under Menu > Internal Forms.
    - **Submit To** - (incoming forms) - select where the incoming form should be sent: specific user, **queue,** or the practice Inbox (default).
    - **Route To** - (incoming forms) - optionally select a **tag** to assign to the incoming form.
4. To design your form:
    - Click **Add a field**.
    - **Type** - select the type of field to add.
        - Single-Line Text
        - Multi-Line Text
        - Date Picker

        - Label/Instructions
        - Section Heading
        - Spacer
        - Check Box
        - Radio Button List
        - Check Box List
    - **Label** - enter the name of the field.
    - **Required** - check the box to require an entry in the field.
    - **Description** - enter instructions to the user.
    - **Key** - skip this field.
    - Click the **X** to close the field window.
    - Repeat this step for each field.
5. To edit a field, click the pencil icon.
6. To delete a field, click the minus sign icon.
7. To finish the form, click **Save**.
8. To enable your immediate access to the form, refresh your browser screen.

To change a Form:

1. Click **MENU** > **Admin** > **Forms Management**.
2. Click the form to change.
3. To change the form header information, click in the field.
4. To change a field in the body of the form, click the pencil icon by the field.
5. To delete a field, click the minus sign icon.
6. To finish, click **Save**.

To duplicate a Form:

1. Click **MENU** > **Admin** > **Forms Management**.
2. Click the form to duplicate.
3. Click **Duplicate** button.
4. Change the name of the form.
5. Change/add other fields as needed.
6. To finish, click **Save**.

To inactivate a Form:

1. Click **MENU** > **Admin** > **Forms Management**.
2. Click the form to inactivate.
3. Uncheck the form types: Active (Portal), Public (Portal), Active (Internal).
4. Click **Save**.

To delete a Form:

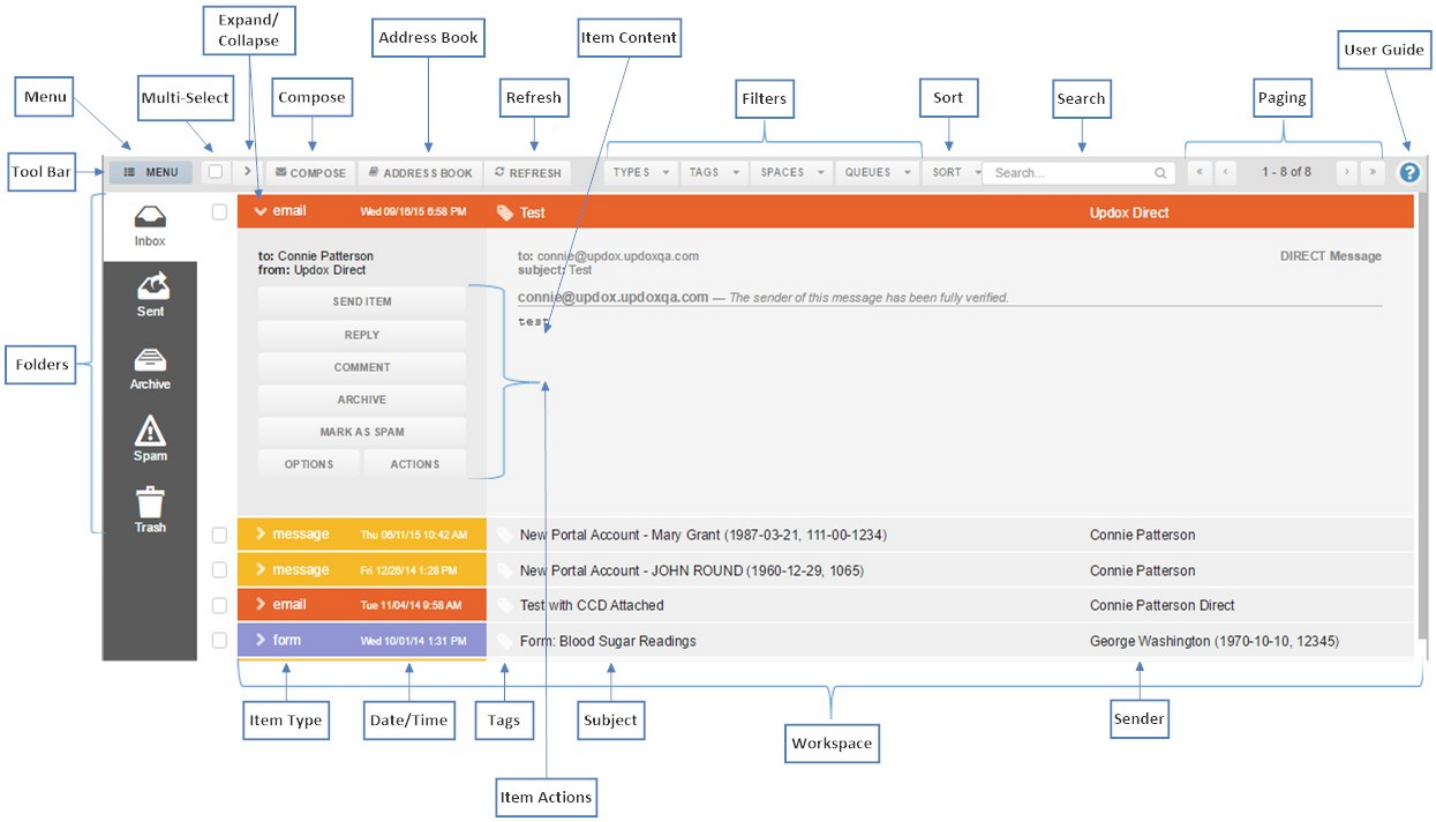
1. Click **MENU** > **Admin** >**Forms Management**.
2. Click the form to delete.
3. Click **Delete**.
4. Click **Save**.

Using the Inbox

This section reviews the features you can use in the Inbox.

About the Home Page

The home page is the central command of the application. From here you can send, receive, view, and organize many types of items. This diagram shows the various components on the Home page.



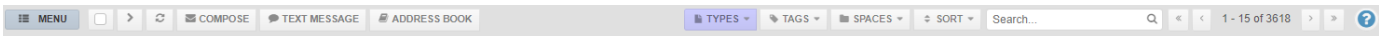
The items in the Workspace are color-coded depending on the item type:

	Fax		Message		Email		Print		Upload
	EMR Message		Save		Portal		Form		Document

Tool Bar

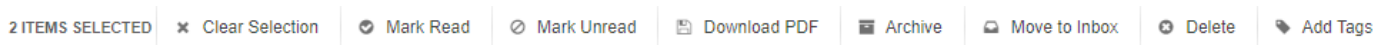
The Tool Bar gives you access to various functions and lets you control the items listed in the Workspace. The look and contents of the Tool Bar vary depending on your screen size and what if anything is selected.

- **Screen Size: Full - Nothing Selected** (Most buttons have a text label)



- **Screen Size: Reduced - Nothing Selected** (Most buttons have an icon label)

- **Screen Size: Full - One or More "Items" Selected**



- **Screen Size: Full - One or More "Pages within an Item" Selected**

Button	Description
MENU	Access to the functions located in the Menu
	Select/un-select all items on the screen
	Expand/collapse all items on the screen
	Refresh the screen
COMPOSE	Access to the Compose function
TEXT MESSAGE	Access to the Text Message function
ADDRESS BOOK	Access to the Address Book function
TYPES	Filter to limit items listed by type
TAGS	Filter to limit items listed by tag
SPACES	Filter to limit items listed by space (private items, practice items)
SORT	Change the sort sequence
Search...	Search for an item
1 - 15 of 3623	Paging controls
	User guide
Clear Selection	Clear the selected items
Mark Read	Mark selected items as Read
Mark Unread	Mark selected items as Unread
Download PDF	Download the selected items (and/or pages) as a PDF document
Archive	Move the selected items to the Archive folder

Move to Inbox	Move the selected items to the Inbox folder
Delete	Move the selected items to the Trash folder
Add Tags	Add tags to the selected items
Clear	Clear the selected pages
Print	Print the selected pages
Edit	Edit the selected pages

Item Types

Location: Workspace

There are several types of items that you may receive into your Workspace. Here's a summary:

Type Filter	Label Seen on Item	Description
Emails	message	Includes emails, Direct messages, and messages sent from the patient portal
Faxes	fax	Faxes
Secure Msgs	message	Secure messages sent between users in the same practice
Printed Files	print	Files uploaded to the Workspace via an Updox virtual printer
Files	upload	Uploaded files; this is a legacy feature
Screenshots	screenshot	Screenshots; this is a legacy feature
EHR Imports	emr	Items sent to an EHR; only applicable the Sent and Archive folders
EMR Msgs	emr_msg	Outbound messages; only applicable to select EHRs
Saves	save	Items saved to disk
Forms	form	Completed forms sent by the patient via the patient portal
Portal Msgs	portal	Messages sent to the patient portal
PMs	pm	Items sent to a Practice Management system; only applicable to select EHRs
Labs	lab	Lab results; only applicable to select EHRs

Text Msgs	text message	Text messages

The items in the Workspace are also color-coded:

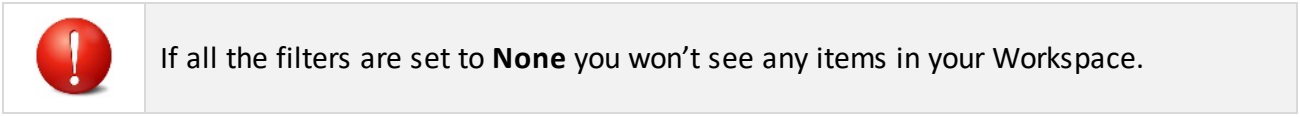
	Fax		Message		Email		Print		Upload		EMR
	EMR Message		Save		Portal		Form		Document		Direct

Using Filters

Location: Workspace

As with email, the number of items in your Workspace can grow to be significant. To make managing the items easier, take advantage of the following filters to limit which items you see in your Workspace:

- Types
- Tags
- Spaces
- Queues



Types

To filter your Workspace by item type:

1. Click the **Types** filter to expand the list.
2. Select the types you want to see.
    - To see all types, click **All** in the **Select (All/None)** choice.
    - To de-select all types, click **None** in the **Select (All/None)** choice.

Every item in the Workspace has one of the following types:

Type	Description
Emails	Includes emails, Direct messages, and messages sent from the patient portal
Faxes	Faxes
Secure Msgs	Secure messages sent between users in the same practice
Printed Files	Files uploaded to the Workspace via an Updox virtual printer
Files	Uploaded files; this is a legacy feature
Screenshots	Screenshots; this is a legacy feature

EHR Imports	Items sent to an EHR; only applicable the Sent and Archive folders
EMR Msgs	Outbound messages; only applicable to select EHRs
Saves	Items saved to disk
Forms	Completed forms sent by the patient via the patient portal
Portal Msgs	Messages sent to the patient portal
PMs	Items sent to a Practice Management system; only applicable to select EHRs
Labs	Lab results; only applicable to select EHRs
Text Msgs	Text messages

Tags

To filter your Workspace by tag:

1. Click the **Tags** filter to expand the list.
2. Select the color tags you want to see.
    - To see all tags, click **All** in the **Select (All/None)** choice.
    - To de-select all tags, click **None** in the **Select (All/None)** choice.

You can use tags as much or as little as you want. Your practice administrator can assign a description to each color. To assign a tag to an item, click the tag icon (after date/time) then select the tag color. For more information refer to the separate articles about tags.

Spaces

To filter your Workspace by space:

1. Click the **Spaces** filter to expand the list.
2. Select the spaces you want to see.
    - To only see your items, select **Private Items**.
    - To only see items for the practice, select **Practice Items**.
    - To see all spaces, click **All** in the **Select (All/None)** choice.
    - To de-select all spaces, click **None** in the **Select (All/None)** choice.

Queues

To filter your Workspace by queue:

1. Click the **Queues** filter to expand the list.
2. Select the queues you want to see.
    - To see all queues click **All** in the **Select (All/None)** choice.
    - To de-select all queues, click **None** in the **Select (All/None)** choice.

Queues are another way to organize items in your Workspace. Your practice administrator sets up the available queues. For more information refer to the separate articles are queues.

Folders

Location: Workspace

The items you send and receive are organized into folders.

Folder	Description
Inbox	The Inbox folder contains the incoming items; very similar to the Inbox in your email application. Various notifications are also sent to this folder (e.g. error messages, failed faxes, etc.)
Sent	The Sent folder contains the items you have sent out (emails, Direct messages, faxes, etc.). This is also where you'll find fax confirmations.
Archive	The Archive folder contains items that are automatically archived as well as items that you have specifically **sent to Archive**. Emails and Direct messages are automatically archived once you reply to them.
Spam	The Spam folder contains items you have specifically **marked as spam** or have automatically been routed here via **The Blocklist**.
Trash	The trash folder contains items that have been deleted.
System	The system folder contains non-vital system generated messages.

System Folder Messages

- Appointment conflicts
- Appointment cancellations
- Appointment confirmations
- New appointments (from Patient Portal requests that are auto-approved)
- Reminder csv file uploads
- New portal account created notification
- Payment cancelation notification
- Portal password reset
- General system error notification
- Portal timeout

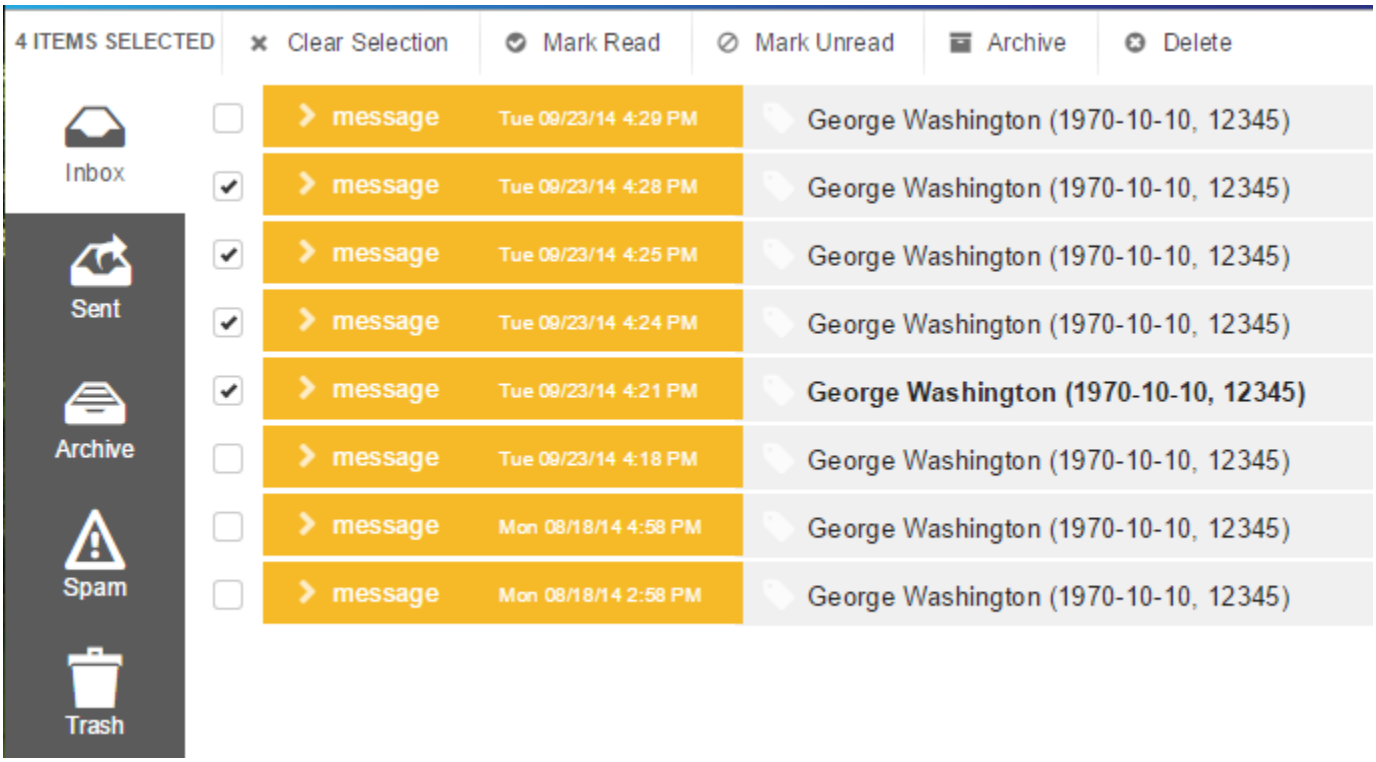
Using Multi-Select

Location: Workspace

The check box column in the Workspace lets you perform the same action on multiple items at the same time.

To use this feature:

1. Check the items individually or hold down the <Shfit> key to select a range of items.
2. At the top of the screen select an action: **Mark Read**, **Mark Unread**, **Archive**, or **Delete**.
3. When finished, click **Clear Section** to close the action bar.



Using Queues

Location: Workspace

Queues are like file folders; they provide a way to organize items in your Workspace, help you manage workflows, and enable you to share access with multiple users. You can also filter by queues if you have access to more than one.

To send an item to a queue:

1. Click on an item in the Workspace.
2. Click the **Send Item** button.
3. Enter the name of the queue in the **Search** box.
4. In the Search results window click on the queue then click **OK**.
5. Optionally, you can enter a **Subject** and/or **Notes** to send with the item.
6. Click **Send**.

Refresh

Location: Workspace

Use the Refresh button on the tool bar to you see new items that have come in since the last time the screen refreshed.

Using Search

Location: Workspace

The Search feature lets you find items in one or more of the folders. All fields are searched (subject, body, addresses).

To search for items:

1. Click in the Search box.
2. Select the folder(s) you want to search (the Inbox, Sent Items, and Archive folders are pre-selected but you can change).
3. Enter your search text.
4. Click the search icon or press <Enter>.

To exit the search results, click any folder.

Using Sort

Location: Workspace

To sort the items in your Workspace:

1. Click Sort to expand the choices.
2. Select the sort sequence:
    - Added (newest first))
    - Changed (recent first)
    - Added (oldest first)
    - Changed (oldest first)
    - Sent From
    - Sent To
    - Subject
    - Type

Using Tags

Location: Workspace

Tags are a colorful way to organize items in the Updox Inbox. That visual splash of color can draw your attention without needing to read the subject or open the item. You can even limit which items are shown in your workspace by filtering by the tag color. The name (and hence the meaning) of each color is set by your practice administrator.

To add a tag to an item:

1. In the Workspace, click the white tag before an item. A selection bar of color tags appears.

2. To see the tab name, hover the cursor over that tag.
3. To see additional tags, click the arrow to scroll.
4. To assign a tag to an item, click the tag.

To close the tag picker bar without selecting a tag:

- press the <Esc> key or click the tag preceding the Subject name.

To remove a tag from an item:

- Click the tag in front of an item. A selection bar of colored tags appears.
- Click the white tag for none.

To see the tag name assigned to an item in the Workspace:

- Hover the cursor over the tag.

Change the Number of Items on a Page in My Profile

Location: My Profile

To change the number of items shown on a page in your workspace:

1. Click **MENU** > **Profile** > **Settings**.
2. In the **Number of items to show on one page** field, click the down arrow to display the list.
3. Click on the number.
4. Click **Save**.

Change Your User Information

Location: Profile

To change your user information:

1. Click **MENU** > **Profile**.
2. Enter changes for:
    - Name
    - Address
    - Message Signature
        - This is similar to a signature in your email application. It will automatically append to the end of your messages. For example: John Smith | ABC Medical Practice | 222-222-2222 | jsmith@abcddirect.com | www.abcmedical.com
3. In the Direct Messaging Provider Directory section, enter (optional):
    - **Specialty Classification**
    - **Specialization**
    - **National Provider ID (NPI)**
4. To view the provider directory user agreement, click **View Accepted User Agreement**. (Note: this agreement initially presents the first time you search the provider directory in the Address Book.)
5. To opt-out of the Direct Messaging Provider Directory, notify your system administrator.
6. To change your your settings, click **Settings,** then enter:
    - **Time Zone** (if not set to the appropriate time zone, update it)
    - **Updox Email**
    - **NHIN Direct Email** (Direct address)
    - **Allow other practices to find/message me**

        - This feature is reserved for future use.
    - **Number of items to show on one page**
        - 15
        - 25
        - 50
    - **Send Printed/Uploaded items to** - this setting controls where printed/uploaded documents will be placed
        - Practice Inbox - everyone will have access
        - My Private Inbox - only you will have access
        - Compose Window - automatically opens the Compose window so you can transmit the printed/uploaded document
        - Queues - print/upload your documents to the selected **Queue**
    - **Convert Printed/Uploaded items in**
        - Smart B&W – Best balance of size and clarity (RECOMMENDED)
        - Black & White – smallest files, best for faxes and text reports
        - Grayscale – medium sized files, best for B&W pictures
        - Color (256 colors) – medium sized files, best for text/reports with color
        - Color (16 million colors) – largest files, best for photos
    - **Refresh page after deleting/archiving an item?**
    - **Show recently searched for patients in Compose window address search**
    - **Workspace Sharing**
        - Optional
        - Select users you want to have access to your Workspace
    - **Send me a notification when the following type(s) of items arrive in my Workspace**
        - Faxes
        - Secure Messages
        - Forms
    - **Send notifications to the following email address**
        - Enter your regular email address
    - **Send notifications to the following text phone number**
        - Enter your cell phone number
6. Click **Save**.

Address Book

Location: Address Book

The Address Book function lets you manage contact information about your patients and other contacts. In this feature you can:

- Add/change contact information
- Create contact groups (e.g. to send faxes to multiple people at once)
- Inactivate contacts
- Delete non-patient contacts
- Compose a message
- Find a Direct address
- Create Patient Portal accounts
- View messages sent to and from patients (related to the Patient Portal)
- View patient appointments (related to the Patient Portal)

Contacts are automatically added to the address book when:

- Using the Compose process and the contact doesn't already exist.
- User accounts are added

Manage an Address Book Contact

Location: Address Book

To add a contact:

1. Click **ADDRESS BOOK**.
2. Click **New**.
3. Select either 1) **Add a Contact/Patient** or 2) **Add a Contact Group**.
4. If adding a contact or patient, enter the following information:
    - **Prefix**
    - **First Name**
    - **Middle Name**
    - **Last Name**
    - **Suffix**
    - **Business Name**
    - **DOB**
    - **Category**
        - If the contact is a patient, select **Patient**.
        - If the contact is not a patient, select one of the other categories.
    - **Email**
        - This field is used for a standard email address or a Direct address.
        - If the contact has both, create two entries in the address book.
    - **Home Phone**
    - **Fax Number**
    - **Sex**
    - **EHR Patient ID**
    - **Default Provider**
        - Applicable to select EHR systems
    - **Address 1**
    - **Address 2**
    - **City**
    - **State**
    - **Zip**
    - **Cell Phone**
    - **Work Phone**
    - **Work Extension**
    - **Reminders Only By** (applicable only if the contact is a patient and the practice has purchased the Reminders product)
        - Practice Preference
        - Email
        - Telephone-Home
        - Telephone-Cell
        - Text Message
        - No Reminders
    - **Voice Reminders Language** (applicable only if the contact is a patient and the practice has purchased the Reminders product)
        - English
        - Spanish
5. If adding a contact group:
    - Enter a **Title**.
    - Search and select one or more existing contacts to add to the group.
    - If the contact doesn't already exist, click **Quick Add** to add the contact, then add them to the group.

- To remove a contact from the group, click the **X** by the contact's name.

5. Click **Save**.
6. Click **X** to close the window.

To change a contact:

1. Click **ADDRESS BOOK**.
2. Enter the contact's name, address, or number in the Search box.
3. In the Search results list click the contact's name.
4. Enter changes.
5. Click **Save**.
6. Click **X** to close the window.

To inactivate a patient or contact in the Address Book:

1. Click **ADDRESS BOOK**.
2. Search for the patient or contact to inactivate.
3. Uncheck **Active**.
4. Click **Save**.
5. Click **X** to close the window.

To delete a contact in the Address Book (note: patient contacts cannot be deleted only inactivated)

1. Click **ADDRESS BOOK**.
2. Search for the contact to delete.
3. In the address book list, click on the contact to delete.
4. Scroll to the bottom of the page and click **DELETE CONTACT**.
5. Click **YES, CONTINUE THIS OPERATION**.

To update an existing contact group:

1. Click **ADDRESS BOOK**.
2. Search for the contact group.
3. Select the group to update.
4. Use the **Add Additional Individual Names** field to search and select contacts to add.
5. Click the X by an existing contact's name to remove them from the group.
6. Click **Save**.
7. Click **X** to close the window.

	If you're using the Patient Portal, you can also create the patient's portal account when adding them to the address book. Just click on the **Patient Portal** tab then click **CREATE ACCOUNT**. If you're system is set to automatically create patient portal then skip this step.

	Users are automatically added to the Address Book when the user account is created.

Address Book - Patient - Messages

Location: Address Book

The patient message history lists all messages sent to or from a selected patient. The information includes date, time, and message subject. The messages are grouped based on where the message currently resides.

- Portal - Inbox
- Workspace - Inbox
- Workspace - Sent
- Workspace - Archived

To review the message history for a patient:

1. Click **ADDRESS BOOK.**
2. In the **Search** box enter the **patient's name**.
3. Click on a patient name to select.
4. Click **Messages** tab.
5. To delete one or more patient portal messages:
    - Click check box by each message to delete.
    - Click **DELETE SELECTED**.

Address Book - Patient Portal

Location: Address Book

The Patient Portal tab in the Address Book lets you create and maintain patient portal accounts, view messages to and from patients, and view patient appointments (if applicable).

Patient Portal

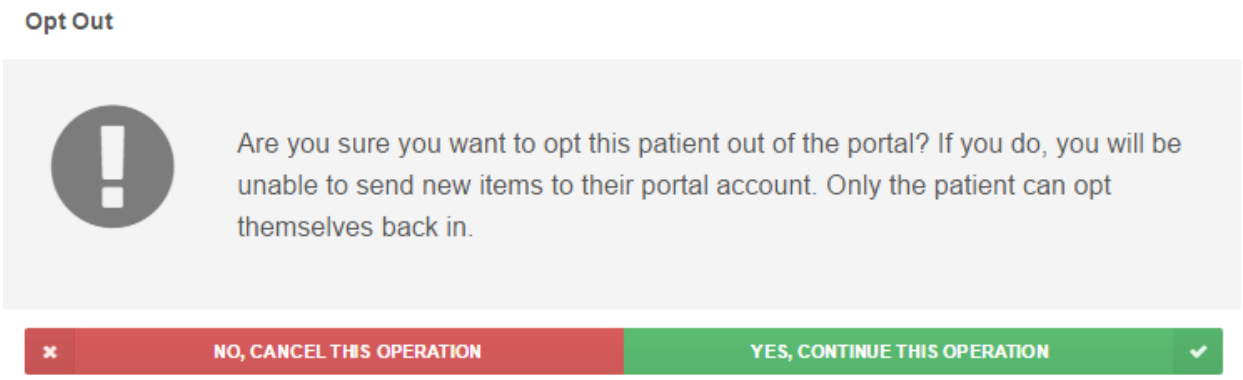
Location: Address Book

To manually create a patient portal account:

1. Go to **Address Book**.
2. Enter patient's name in the Search box.
3. Select the patient from the search results list.
4. Click **Patient Portal** tab.
5. Click **CREATE ACCOUNT**.

To modify a patient portal account:

1. Click Patient Portal tab.
2. To print a card with the patient's username and password, click **PRINT CARD.**
3. To change a patient's username, click **EDIT USERNAME** then enter the changes.
4. To change a patient's password, click **RESET PASSWORD.**
5. To re-invite the patient to the Patient Portal, click **RE-INVITE**. (If the RE-INVITE button isn't present verify the patient's email address is on file.)
6. If the patient doesn't want to receive secure messages and their healthcare records in the Patient Portal, click **OPT OUT**. If they later decide they want to opt in they can do so by signing into the Patient Portal. The following message displays. Click **Yes...** to continue or No... to cancel.



Selecting any of these patient portal actions requires the patient to change their password the next time they sign into the portal.

Patient Portal - Appointments

Location: Address Book

Within the Address Book you can view and change a patient's appointments.

To access a patient's appointments:

1. Go to **Address Book**.
2. Enter patient's name in the Search box.
3. Select the patient from the search results list.
4. Click **Patient Portal** tab.
5. Click Appointments.
6. To view details about the appointment or to make a change, click the **View/Change** link. (Note: this link isn't present on past appointments).
7. When finished, click **SAVE**.
8. Click **X** to close the window.

Direct Address Directory

Location: Address Book

Direct messaging is an easy-to-use, fast and secure electronic communication service for clinical providers and others who regularly transmit and/or receive protected health information (PHI). To use Direct messaging, both the sender and receiver need to have a Direct address (similar to an email address).

So how do you find someone's Direct address? One way would be to ask them for it, but a more convenient way is to search a directory of Direct addresses. Currently, there aren't any nationwide directories available but many Health Information Service Providers are working together to share their directories. As the use of Direct messaging expands the more complete these directories will become.

Using a Direct address found in the directory is very simple:

1. In the Address Book - use the Find in Directory feature to search, select, and save the desired contact.
2. In Compose, select that contact from your Address Book.

Your Information

If you have a Direct address your information is also in the Provider Directory so that other providers can find your address. Out of the gate, the following information is included:

- User's first and last name
- Organization name
- City
- State Zip Code

Additionally, you can add the following information about yourself to enable other providers to refer patients to you more easily. To enter this information go to your Profile or the User definition under the Admin menu.

- Specialty (Classification and Specialization)
- National Provider ID (NPI)

If you do not want other providers to find you in the directory, you can opt-out of the directory in the User definition.

Direct messaging must only be used for healthcare purposes.

Direct Address Directory User Agreement

Location: Address Book

The first time a user searches the provider directory in the Address Book the following user agreement is presented for review and acceptance. Once accepted, the user can see the agreement again in their Profile.

- By using the provider directory you acknowledge you are in compliance with this agreement.
- Use of the provider directory is permitted for Direct messaging only.
- The provider directory must not be:
    - redistributed
    - used for advertising or marketing purposes
    - used to send information that will influence medical decisions for financial gain
- The provider directory is:
    - comprised of direct messaging user information from hospitals and medical practices participating in the DirectTrust network, the information includes:
        - first name
        - last name
        - direct address
        - NPI (if applicable)
        - specialty (if applicable)
        - organization name
        - city
        - state
        - zip code
    - additions and changes to user information are submitted to the provider directory on a regular basis
    - physically protected by firewalls and encryption
    - procedurally protected by HIPAA privacy and security policies
    - self-regulated to be in compliance with DirectTrust provider directory policies

- You have the right to opt out of the provider directory in which case the information will not be available to other DirectTrust network users when searching for a recipient's direct address.

Direct messaging must only be used for healthcare purposes.

Find in Directory

Location: Address Book

The Find in Directory function lets you search for a Direct address for a provider, administrative staff, or department at another practice or hospital.

The first time a user searches the directory a user agreement is presented for review and acceptance.

Direct messaging must only be used for healthcare purposes.

To search the directory for a Direct address:

1. Click **ADDRESS BOOK**.
2. Click **FIND IN DIRECTORY**.
3. To display search tips, click the **?** at the end of the search box.
4. In the search box, enter one or more of the following in any sequence (it's similar to a Google search), then click **SEARCH**.
    - Provider Name
    - Organization Name
    - Specialty
    - National Provider ID
    - City
    - State
    - Zip Code
5. A list of Direct addresses matching the search criteria displays along with a Level of Assurance (LOA) code that describes the extent to which the person's identity has been verified. To see a description of the LOA move the cursor over the code (also see note below).
6. To save one or more addresses to the practice Address Book, click the check box by each entry, then click **SAVE IN ADDRESS BOOK**.
7. Click **X** to close the window.

The LOA column indicates the level of assurance the person is "who they say they are". The higher the number the higher the trust.

- **L1** - Recipient was issued a Direct address by their EHR vendor or Health Information Services Provider but their identity may not have been checked or verified.

- **L2** - Recipient's identity was proven either in person or remotely:
  In Person
  A government issued photo ID was compared to the person. The person's name, address, date of birth, and ID number were recorded.

  Remotely
  The person's name, address, and date of birth were verified. Additionally, a government issued ID and financial/utility ID were inspected. Either the government ID --OR-- the financial/utility ID were verified.

- **L3** - Recipient's identity was proven either in person or remotely:
  In Person
  A government issued photo ID was compared to the person.
  The person's name, address, date of birth were verified.

  Remotely
  The person's name, address, date of birth were verified. Additionally both a government issued ID --AND-- a financial/utility ID were verified.

Compose Messages

This section provides information on composing messages.

Compose - Email Message

Location: Home Page

To send an email message:

1. Click **Compose.**
2. Select recipient:
   - Recent list - click name if present.
   - Search - enter the recipient's name or email address in the Search box, then click name to select.
   - If the recipient doesn't exist, click **New**.
3. Check **Send email to...** then click **OK**.
4. Since "emailing" protected health information is not secure, the following reminder message displays: **Emailing patient health information to this address is not HIPAA compliant.** To send patient information consider using Direct messaging instead.
5. Enter a **Subject**.
6. Enter the message text.
   - To format the text, use the **bold**, **italics**, and **underline** buttons.
   - To use pre-defined templates, click the **Templates** button.
7. **Add attachments** as needed.

8. **Add other recipients** as needed.
9. Click **SEND**.

When searching for an address that results in multiple entries for the same recipient, click on the contact to verify it contains the Direct address. There are separate contacts in the Address Book for each contact method. For example, if the recipient has a Direct address, an email address, and a fax number there will be 3 separate contacts.

Compose - Patient Portal Secure Message

Location: Home Page

To send a message to the Patient Portal:

1. Click **Compose**
2. Select patient:
    - Recent list - click name if present.
    - Search - enter the patient's name in the Search box, then click name to select.
    - If the patient doesn't have a portal account go to **Inviting Patients to the Patient Portal**.
3. Check **Send to portal** then click **OK**.
4. Enter a **Subject**.
5. Select the from address:
    - Your Address - uncheck **Send as Practice**.
    - Practice - check **Send as Practice**.
6. Optional - **If this item is not viewed in the portal, alert me in**: (1 hour, 2 hours, 4 hours, 8 hours, 1 day, 2 days, 4 days, or 1 week).
7. Enter the message text.
    - To format the text, use the **bold**, **italics**, and **underline** buttons.
    - To use pre-defined templates, click the **Templates** button.
8. **Add attachments** as needed.
9. **Add other recipients** as needed.
10. Click **SEND**.

This feature isn't available if the selected patient has set their Patient Portal Profile to not allow messages.

Compose - Save to EHR

Location: Home Page

To send an item to the patient's EHR record.

1. Click **Compose**
2. Select patient:
    - Recent list - click name if present.
    - Search - enter the patient's name in the Search box, then click name to select.

3. Check **Save to EHR** then click **OK**.
4. Enter a **Subject**.
5. Select a **Category** for storing the item in the EHR.
6. Enter **Date of item** if different from today.
7. If a notification should be sent to a doctor when this item is saved to the patient's EHR record, select the person in the **Notify doctor** field.
8. In the **Notes** field enter the item text.
9. **Add attachments** as needed.
10. **Add other recipients** as needed.
11. Click **SEND**.

Compose - Save to Disk

Location: Home Page

To save an item to your computer's disk drive:

1. Click **Compose**
2. Select patient:
    - Recent list - click name if present.
    - Search - enter the patient's name in the Search box, then click name to select.
3. Check **Save to Disk** then click **OK**.
4. Enter a **Subject**.
5. Select a **Category** if needed.
6. In the **Notes** field enter the item text.
    - To format the text, use the **bold**, **italics**, and **underline** buttons.
    - To use pre-defined templates, click the **Templates** button.
7. **Add attachments** as needed.
8. **Add other recipients** as needed.
9. Click **SEND**.

Compose - Direct Message

Location: Home Page

Before using this feature you must have a Direct address defined in your user account. Use Direct messaging only for healthcare purposes.

To send a Direct message:

1. Click **Compose.**
2. Select recipient:
    - Recent list - click name if present.
    - Search - enter the recipient's name or Direct address in the Search box, then click name to select.
    - If you don't know the recipient's Direct address, check the **Directory** in the Address Book to see if it has been shared with us.
    - If the recipient doesn't exist, click **New**.
3. Check **Send direct to...** then click **OK**.
4. A message banner displays letting you know the level to which the recipient's identity has been verified by a registered authority (e.g. credit bureau). All participants in the DirectTrust network are fully verified. A lower level verification does not mean the recipient is untrustworthy; its simply a

signal to be cautious that you are sending to the correct recipient.
    - Green banner - Fully verified
    - Blue banner - Some level of verification
    - Yellow banner - May not have been verified
5. Enter a **Subject**.
6. Enter the message text.
    - To format the text, use the **bold**, **italics**, and **underline** buttons.
    - To use pre-defined templates, click the **Templates** button.
7. **Add attachments** as needed.
8. **Add other recipients** as needed.
9. Click **SEND**.

Failure Notification

If a Direct message cannot be delivered or if an acknowledgment notification is not returned by the recipient's system, a Direct Message Failure notification is sent to the Inbox (or **System folder** if set to do so) to let you know the status. The recipient's Direct address is included in the subject line of the notification.

When searching for an address that results in multiple entries for the same recipient, click on the c the Direct address. There are separate contacts in the Address Book for each contact method. For has a Direct address, an email address, and a fax number there will be 3 separate contacts.

Finding a Recipient Direct Address

Location: n/a

Since Direct messaging is a relatively new method of communication you may not know the Direct address of the person you want to contact. (You ran into this same dilemma when you first started using email or fax.)

Here are some hints:

- Use the Find in Directory feature in the Address Book to search for a Direct address then save to your practice's address book.
- Check a previous email from the person; they may include their Direct address in the signature line.
- Check the person's business card if you have one; it may include their Direct address.
- Check the medical practice's website; it may list the Direct addresses for the providers.
- Simply call and ask them.

Once you have a person's Direct address add them as a contact in the Address Book. In short order, you'll have a list of your most commonly used contacts.

Direct messaging must only be used for healthcare purposes.

Can I Send to Any Direct Address?

Location: n/a

You can send to any valid Direct address, but…the receiver's system may reject the message if you aren't in their trusted network.

A couple of factors that make Direct messaging secure is that both parties need to exchange security certificates and feel confident everyone is who they say they are. As you can imagine, that would be very time consuming to do on a one-by-one basis.

To facilitate the exchange of Direct messages, Trust Communities are emerging where members are "pre-approved" for Direct exchange. DirectTrust is the largest of these communities. Updox, as your Health Information Service Provider (HISP), is an accredited member of DirectTrust which means you can exchange with any other trusted user served by a HISP in the bundle.

To become trusted, a user (or a representative of the medical practice on behalf of the users) needs to pass an identity verification process.

Now, the big question…is the person you're sending to part of the DirectTrust network? Currently, the quickest way to know is simply to send a Direct message to the person. If the proper security certificates aren't in place you'll receive an error that the message couldn't be delivered.

As you discover trusted Direct addresses, be sure to add the contacts to your practice's Address Book which will make exchange easier going forward.

Once Provider Directories become available you'll also be able to simply search for Direct addresses in the nationwide network.

Direct messaging must only be used for healthcare purposes.

Use Recent List to Select Patient

Location: My Profile

A quick way to find the contact info for a patient that you recently communicated with is to select them from the **Recent** list. The list contains the last 10 patients you contacted. When you sign off the list is cleared and starts over the next time you sign in.

To turn on the feature:

1. Click **MENU > Profile.**
2. Click **Settings**.
3. Check **Show recently searched for patients in Compose window address search**.
4. Click **Save**.

To use the feature:

1. Click **COMPOSE**.
2. Enter a patient's name (or partial name).
3. Select the patient from the Recent list.
4. Continue with the Compose process.

New Contact - Quick Edit

If a recipient doesn't already exist in your address book, use the Quick Edit to add the contact.

1. Enter the contact information:
    - First Name
    - Last Name
    - Company
    - Email Address (regular email or Direct address)
    - Fax Number
2. To save, click **OK**.
3. To cancel or change, click **Back**.

Add Attachments

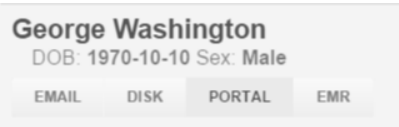
To attach one or more documents, check **Include attachments**.

- At the bottom of the page click the **+** sign to add attachments.
- Navigate to the document location then double click the document to attach.
- Repeat for each document you want to include.
- To rearrange the documents, click on the document then drag it to another position in the attachment list.

Add Other Recipients

To send the same message to another contact or user:

1. Enter their name in the box: **Search for additional contacts or users…**
2. Click name to select.
3. Select communication method if there's more than one. The methods available vary depending on the recipient's address.
4. Click OK.



Archive

Location: Workspace

To move an item to the Archive folder:

1. In the Workspace, click on the **>** to expand the item to archive.
2. Click **ARCHIVE**.

To move multiple items to the Archive folder:

1. In the Workspace, click the checkbox before each item to archive.
2. In the menu bar that presents at the top, click **Archive**.

To see items previously archived:

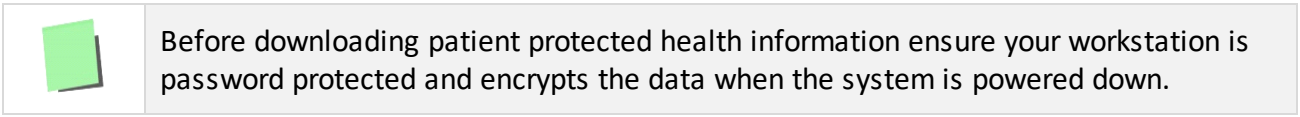
1. In the Workspace, click the **Archive** folder.

Save Attachments

Location: Workspace

To save attachments to your workstation:

1. In the Workspace, expand the item.
2. Select the attachment(s) to save by clicking the box below each one.
3. On the tool bar at the top of the page, click **Save**.
4. Navigate to a location on your workstation to complete the save (this step varies depending on the web browser you use).



Before downloading patient protected health information ensure your workstation is password protected and encrypts the data when the system is powered down.

Change Attachment Orientation

Location: Workspace

To change the orientation of an attachment on an item:

1. In the Workspace, click on the **>** to expand the item with an attachment.
2. Click **ACTIONS**.
3. To select all of the attachments, click **Select all.**
4. To deselect all of the attachments, click **Select none**.
5. To rotate the selected attachments 90° clockwise, click **Rotate all 90°.**
6. To rotate the selected attachments 90° counter clockwise, click **Rotate all -90°.**
7. To flip the selected attachments 180°, click **Flip all**.

Comment

Location: Workspace

To add a comment to an item.

1. In the Workspace, click on the **>** to expand the item.
2. Click **COMMENT**.
3. Enter the comment in the text box.
4. Click **COMMENT** (below the text box).

The comment is appended to the item along with the date, time, and name of the user who entered the comment.

Delete

Location: Workspace

A user's ability to delete items is defined in the **Can delete items from Inbox** setting in **Admin** > **Users** > **Settings**.

To delete one or more items:

1. In the Workspace, click the checkbox before each item to delete.
2. In the menu bar that presents at the top, click **Delete**.

To see items previously deleted:

1. In the Workspace, click the **Trash** folder.

Delete All

Location: Spam and Trash Folders

A user's ability to delete items is defined in the **Can delete items from Inbox** setting in **Admin** > **Users** > **Settings**.

To delete all of the items in the Spam or Trash folder.

1. Go to the Spam or Trash folder.
2. In the menu bar that presents at the top, click the **Delete All button**.
3. When the confirmation message displays, click **Delete All** to continue or **Cancel** to abort the process.
    - The delete process will start at 11:30 pm.
    - To abort the delete process before it starts, click **Cancel Delete**.

Download as PDF (or TIFF)

Location: Workspace

The Download as... feature lets you download items in the Workspace to your workstation. The file type (PDF or TIFF) of the downloaded item is controlled by the **Download messages as** setting in Admin > Practice Settings.

PDF

There are two ways to download an item/attachments as a PDF:

1. Options
    - In the Workspace, click on the **>** to expand the item.
    - If only select pages in the attachments should be downloaded, click the checkbox below those pages.
    - Click OPTIONS.

- Name the file and click Download PDF.
- When the PDF document opens save it to your computer.

2. Menu Bar
    - Click the checkbox before the item(s).
    - If only select pages in the attachments should be downloaded, click the checkbox below those pages.
    - In the Menu bar at the top, click **Download PDF.**
    - When the document opens you can name it and save it to your computer.

TIFF

To download the item as a TIFF file:

- Click the checkbox before the item(s).
- If only select pages in the attachments should be downloaded, click the checkbox below those pages.
- In the Menu bar at the top, click **Download TIFF.**
- When the document opens you can name it and save it to your computer save it to your computer.

If you need to download patient information to your computer you need to take extra precautions to keep the information secure. A common practice is to install software on your computer to automatically encrypt your data files at rest.

Edit an Attachment

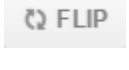
Location: Workspace

To edit an attachment on an item:

1. In the Workspace, click the item.
2. Click the attachment to edit.
3. Use one or more of the following tools to edit the document.
4. To save the changes to the document, click **Save**.
5. To discard all the changes, click **Cancel**.

Editing Tools		
	Move, resize, or remove an annotation	Use to move, resize, or remove an annotation.
	Zoom	Zoom in or out by sliding the bar.
	Insert Text	Insert text. Click the down arrow to change the font. To resize, click the edge then drag. To re-edit and place your cursor in a specific spot, hold down the "Alt" key then click the spot in the text to place the cursor.
	Bold	Bold the selected text.

	Italic	Italicize the selected text.
	Set annotation color	Change the annotation color.
	Freehand draw	Add a freehand scribble.
	Undo	Undo your last edit; click again to undo the next edit.
	Redact	Drag the cursor over the area to be redacted.
	Highlight	Add a highlight. To resize, click the edge then drag. To highlight while inserting text, place the cursor at the start of the text to highlight, hold down the "Shift" key, then click the end of the text to highlight.
	Rectangle	Add a rectangle. To resize, click the edge then drag. You can add text to the rectangle by directly typing in it or use your computer's Copy & Paste functionality. When using Copy & Paste, do that first before directly entering/editing any text.
	Upload signature	Add the signature defined in your user profile. To resize, click the edge then drag.
	Date/Time	Add the current date and time. To resize, click the edge then drag. The format of the date/time is controlled by your browser.
	Signature with Date	Add the signature along with the current date/time
	Checkbox	Add a checkbox. To resize, click the edge then drag.
	Arrow	Add an arrow. To change the direction or resize, click the edge then drag.
	Line	Add a horizontal line. To change the length or position, click the edge then drag.

Orientation Tools	
	Rotate image counter-clockwise 90 degrees
	Rotate image clockwise 90 degrees
	Flip image vertically

PRINT	Print the document (to include edits, remember to save before printing)

Import to EHR

Location: Workspace

This feature is available only if your EHR software vendor supports it.

If an item in the Workspace has a patient's record (CCD) attached (.xml format), you can import the CCD into the EHR by using the Import to EHR button within the message. If the message has other files attached in addition to a CCD and your EHR supports the file type (e.g. pdf, txt), you can import those files as well.

To import the file(s):

1. In the Workspace, expand the item with a CCD attached.
2. Click the **Import to EHR** button.

Item Actions

Location: Workspace

Your Workspace is a repository of items that come in from many sources (similar to an email inbox). The actions that you can perform on an item vary depending on the item type. This article provides an overview of the actions. For details, refer to the separate article about the action.

Item Action	Description
Send Item	Sends the item to another location or recipient. The destinations available vary by the item type.
Save to disk	Saves the item to your computer's disk
Send to portal (new account)	Sends the item to the patient portal
Import into chart/EHR	Imports the item into the chart/EHR
Send Email	Sends the item as an email
Send Fax	Sends the item as a fax
Secure Message	Sends the item as a secure message
Reply	Send a response to an item
Comment	Adds a comment to an item
Archive	Moves an item to the Archive folder
Delete	Moves an item to the Trash folder

View audit trail	Shows the history of actions on the item including delivery status notifications.
Print	Prints an item
Download PDF	Downloads the item as a PDF
Mark read	Marks the item as read
Mark unread	Marks the item as unread
Route Item	Reassigns the item to another person in the practice

If an item has one or more attachments, you can perform the following actions on the attachment(s).

Attachment Action	Description
Select all	Selects all of the attachments on the item
Select none	Deselects all of the attachments on the item
Rotate 90°	Rotates the selected attachments on the item 90° clockwise
Rotate -90°	Rotates the selected attachments on the item 90° counter clockwise
Flip all	Flips all the attachments on the item 180°

Mark as Read

Location: Workspace

To mark one or more items as read:

1. In the Workspace, click the checkbox before each item to mark as read.
2. In the menu bar that presents at the top, click **Mark Read**.

Mark as Unread

Location: Workspace

To mark one or more items as unread:

1. In the Workspace, click the checkbox before each item to mark as unread.
2. In the menu bar that presents at the top, click **Mark Unread**.

Move to Inbox

Location: Workspace

The Move to Inbox option lets you move an item from the Archive or Delete folders back to the Inbox folder.

To move an item:

1. In the Workspace, click the Archive or Delete folder.
2. Click the checkbox before each item to move back into the Inbox folder.
3. In the menu bar that presents at the top, click **Move to Inbox**.

When an item is moved back to the Inbox folder it retains its original receive date. To quickly find the item, click **Sort** then **Changed (recent first)**.

Reply

Location: Workspace

The Reply action lets you send a response back to the sender for an item you received.

To send a reply:

1. In the Workspace, click on the **>** to expand the item.
2. Click **REPLY**.
3. If the **Reply To** address isn't present enter the recipient's name or address in the Search box.
4. To include additional recipients on the reply, enter their name or address in the box: **Search for additional contacts or users…**
5. Enter the message text.
6. To include attachments, click the **+**.
    - Navigate to the document location then double click the document to attach.
    - Repeat this process for each attachment.
7. To rearrange attachments, click on the document then drag it to another position in the attachment list.
8. Click **Send**.

The original message remains in the **Inbox** folder and a copy is placed in the **Sent** folder.

Route Item

Location: Workspace

The Route Item action lets you reassign an item to another user in your practice.

To route an item:

1. In the Workspace, click on the **>** to expand the item to route.
2. Click **OPTIONS**.
3. Click **Route Item**.
4. In the Search box, enter the user's name then select.
5. Enter comments or instructions as needed.
6. Click **SEND**.

Save CCD

Location: Workspace

If an item in the Workspace has a Patient Record (CCD) attached, you can download the file to your workstation

1. In the Workspace, expand the item to see the available actions.
2. Click **Save**.
3. Navigate to a location on your workstation to complete the save (this step varies depending on the web browser you use).

	Before downloading patient protected health information ensure your workstation is password protected and encrypts the data when the system is powered down.

Send Pages

Location: Workspace

If you want to send pages from one or more items in the Workspace

1. In the Workspace, click on the **>** to expand an item.
2. Select one or more pages to send.
3. Repeat steps 1 and 2 until you've selected all the pages that are to be sent.
4. In the menu bar at the top, select Send.
5. Select recipient:
    - Recent list - click name if present.
    - Search - enter the recipient's name, email, Direct address, or fax number in the Search box, then click name to select.
    - If the recipient doesn't exist, click **New**.
6. Select the transmit method.
7. Enter a **Subject**.
8. Enter the message text.
    - To format the text, use the **bold**, **italics**, and **underline** buttons.
    - To use pre-defined templates, click the **Templates** button.
9. **Add additional attachments** as needed.
10. **Add other recipients** as needed.
11. Click **Send**.

	When multiple pages are selected from multiple items, the pages are grouped by item (in the same order) then arranged based on the date the item was received into the Inbox (oldest item first).

Send To

Location: Workspace

The **Send To** feature lets you forward an item to another user, patient, contact, or to a patient's chart in the EHR system. To use the feature:

1. In the Workspace, click on the **>** to expand the item.
2. Click **SEND TO**.
3. In the **Search** box enter the recipient's name or address.
    - If the recipient is already in your address book, select them from the list.
        - Depending on the recipient type (patient, contact, user) and their address book information, you may be presented with a list of actions. Choose the one you want to use. For example:
            - Send email
            - Send fax
            - Send to portal
            - Send to EHR chart
            - Save to disk
            - Secure message
            - No actions available (i.e. no communication address or number)
    - If you're sending to the EHR the recipient you select must be a patient.
    - If the recipient isn't in your address book, click **Create and send to**.
    - If address is correct, click **OK**. Otherwise, click **Back**.
4. Enter a Subject.
5. If you're sending to the EHR:
    - Select a **Category** (if applicable to your EHR). If there are more than 10 in the list you can search for the category.
    - Select a provider for **Notify doctor** (optional). If there are more than 10 in the list you can search for the person. To remove your selection, click **None**.
    - Enter **Date of item**.
    - To sign off on the document, check **Sign off as me**.
    - To include the document history, check **Include history (as shown in history section above).**
    - Optionally enter **Notes**.
    - Skip step 6.
6. Select the from address:
    - To send from your address, uncheck **Send as Practice**.
    - To send from the practice address, check **Send as Practice**.
7. To attach one or more documents, check **Include attachments**.
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - To rearrange the documents, click on the document then drag it to another position in the attachment list.
    - If you are sending to the EHR, go to step 10 next.
8. Enter the message text.
    - You can use the **bold**, **italics**, and **underline** buttons to format the text.
    - You can use pre-defined templates by clicking the **Templates** button.
9. To send a message to another recipient:
    - Enter their name or address in the box: **Search for additional contacts or users…**
    - Repeat the steps above starting with the bullets under Step 2.
10. Click **SEND**.

	If a recipient has an email address, a Direct address, and/or a fax number the Address Book and Compose Search window will have multiple entries for the same recipient. To determine which one you need, click on the recipient then verify if the address is correct. If so, proceed with the message. If not, click Back to select a different entry for this recipient.

Send to EHR

Location: Workspace

The **Send To** feature lets you forward an item to another user, patient, contact, or to a patient's chart in the EHR system. This article is about sending to the EHR.

To import into the patient's chart in the EHR:

1. In the Workspace, click on the **>** to expand the item.
2. Click **SEND TO**.
3. In the **Search** box enter the patient's name.
    - Select the patient.
    - Click **Send to EHR**.
    - Click **OK**.
4. Enter a **Subject**.
5. Select a **Category** (if applicable to your EHR). If there are more than 10 in the list you can search for the category.
6. Select a provider for **Notify doctor** (optional). If there are more than 10 in the list you can search for the person. To remove your selection, click **None**.
7. Enter **Date of item**.
8. If you want to sign off on the document, check **Sign off as me**.
9. If you want to include the document history, check **Include history (as shown in history section above).**
10. Enter **Notes** (optional).
11. If you want to attach one or more documents, check **Include attachments**.
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - If you want to rearrange the documents, click on the document then drag it to another position in the attachment list.
12. Click **SEND**.

Share Securely

Location: Workspace

If an item in the Workspace has a Patient Record (CCD) attached, you can share it with others in your practice:

1. In the Workspace, expand the item to see the available actions.
2. Click **Share Securely.**

Sign an Attachment

Location: Workspace

To add your signature to an attachment on an item:

1. In the Workspace, click the item.
2. Click the attachment to sign.
3. Click the following signature tool:

4. Click on the spot in the document to place your signature.
5. To resize or move the signature, click the edge then drag.
6. To save the document with your signature, click **Save**.
7. To discard the changes, click **Cancel**.

Spam

Location: Workspace

At times you may receive unwanted emails or faxes. When this occurs use the Spam function to move the item to the Spam folder.

1. In the Workspace, click on the **>** to expand the item.
2. If the item is a fax, you can optionally add the number to the **Fax Block List** at the same time you're sending it to the Spam folder. Next time you receive a fax from that number
3. Click **MARK AS SPAM**.

Deleting Spam Messages

In the Spam folder you can either:

- Selectively delete individual items or
- Click the **Delete All** button

View

Location: Workspace

To view an item:

1. In the Workspace, click the item to view.
2. The item expands to show the contents.
3. If an item has an attachment there are two ways to see the attachment contents:
    - Roll the cursor over the document to initiate an auto-zoom preview of the contents.
    - Click the attachment. This opens a separate window that enables you to perform the following actions:
        - Rotate left
        - Rotate right
        - Flip
        - Edit
        - Close
4. To close the item, click the item header.

	If a message has a Continuity of Care Document (CCD) attached, use the **View Record** button to display the patient's summary.

	If an item is an incoming Direct message and the information is available, the sender's healthcare category (covered entity, business associate, patient) and level of identity verification are displayed. This information provides additional information about the sender's identity.

	If an image file is received via the Patient Portal message, the image will display as a thumbnail if the file extension is BMP, SVG, JPG, PNG, or GIF. All other file extensions will be presented as downloadable links.

View Audit Trail

Location: Workspace

The audit trail lets you see a history of actions regarding the item. For example, the dates when the item was sent, receipt notification received (if external), and viewed (if internal),

To view the audit trail for an item:

1. In the Workspace, click on the **>** to expand the item.
2. Click **OPTIONS**.
3. Click **View audit trail**.
4. Click the **Print Audit Trail** button if needed.
5. To close the window, click the **X**.

View Record

Location: Workspace

If an item in the Workspace has a Patient Record (CCD) attached, you can view the record in a human readable format:

1. In the Workspace, expand the item to see the available actions.
2. Click **View Record**.
3. When finished, click the X to close the view.

Viewer Format

The viewer format varies depending on the EHR you're using and if the EHR has enabled the enhanced viewer yet.

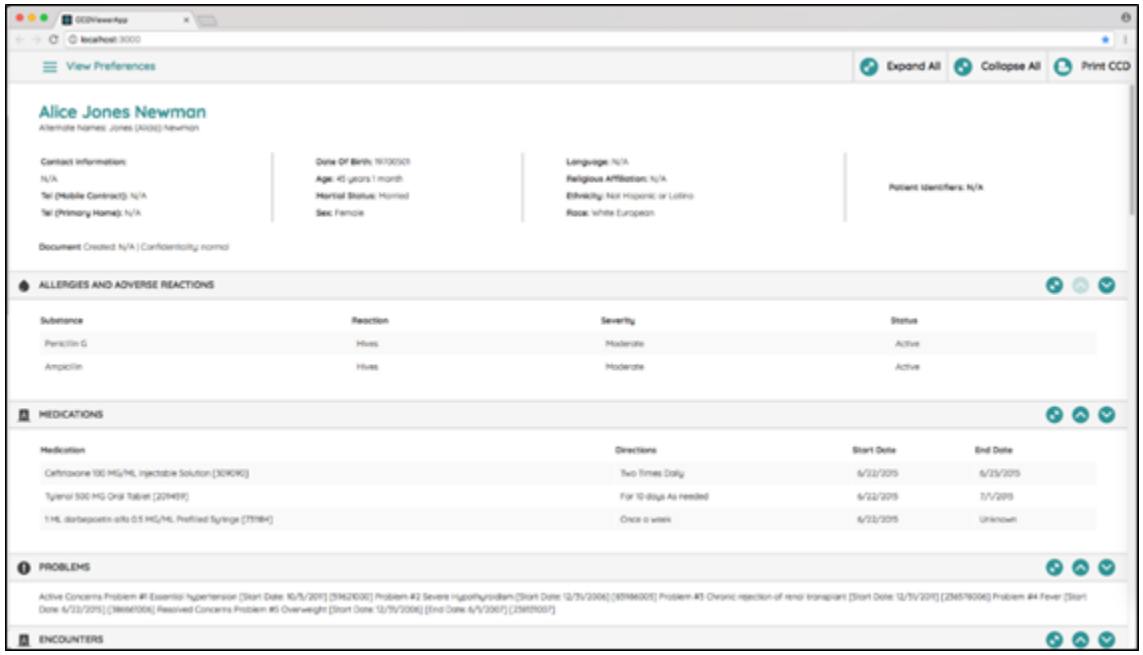
- The Standard Viewer displays the information in a basic report format.
- The Enhanced Viewer provides additional features:
    - Ability to expand and collapse sections (all or individual)
    - Ability to change the order of the sections .
    - Ability to print the CCD.
    - Ability to define your own default viewing preferences.

Standard Viewer Example

Alice Newman Sample 1 v12

Patient	Alice Newman
Date of birth	May 1, 1970
Sex	Female
Race	White
Ethnicity	Not Hispanic or Latino
Language	en (preferred) Language
Contact info	Primary Home: 1357 Amber Dr Beaverton, OR 97006, US Tel: +1(555)-777-1234
Patient IDs	111223333 2.16.840.1.113883.4.1
Document Id	TT101 2.16.840.1.113883.19.5.99999.1
Document Created:	June 22, 2015, 10:30, EST
Care provision	Fever from June 22, 2015, 10:00, EST to June 22, 2015, 10:30, EST
Performer (primary care physician)	Dr Albert Davis of Neighborhood Physicians Practice
Performer	Tracy Davis

Enhanced Viewer Example

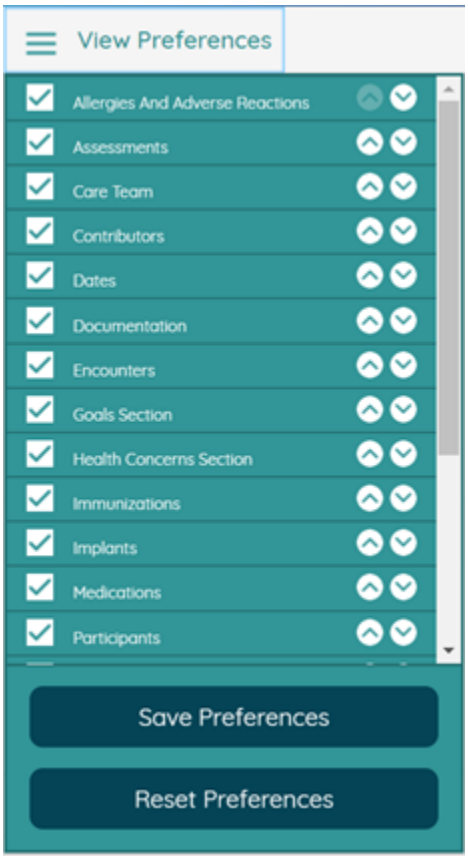


- By default, all sections in the record are automatically expanded.
- To simplify the display, click **Collapse All** then expand the individual section(s) as needed.
- To re-expand all sections, click **Expand All**.
- To display contact info for the various people/organizations, click the **Contact** buttons.
- To change the order of sections, click the arrow icons to move a section up or down.
- To print a report, click **Print CCD**.
- To define your default viewing preferences, click **View Preferences**.

Defining View Preferences

The View Preferences button lets you customize your specific view of the record. You can change which sections

display and the order of those visible sections.



- To change which sections automatically display in your default view, select/unselect the checkbox before the section name. (When viewing a record, you can still access unchecked sections by opening **View Preferences** and clicking the section name).
- To change the default order of sections, use the arrows to move sections up and down in the list.
- To re-select all sections and revert to alphabetical order, click **Reset Preferences**.
- To save, click **Save Preferences**.
- To exit the preferences screen, click the **View Preferences** menu bar.

Text Message

The Text Message feature lets you send SMS text messages to a single recipient from within the Inbox.

Text Message

The Text Message feature lets you send SMS text messages from the Inbox to a person's cell phone.

- Each time the recipient responds or you send a reply those messages append to the original text message (similar to text messaging on your phone).
- When a response is received, the original text message shows as unread in the Inbox.
- After 24 hours of inactivity, the text message thread will expire. Any subsequent messages between you and the recipient will start a new thread.

Notes:

- This service is free and available for select EHR products.
- A phone number is automatically assigned to the practice (or location) upon sending the first message.
- The message type is Text Msgs.
- When a text message is received, the Address Book names (first, last, and/or business) associated with the telephone number display to identify the sender. If the telephone number is not listed in your

Address Book, just the number displays.
- Attachments cannot be sent or received via text messaging.

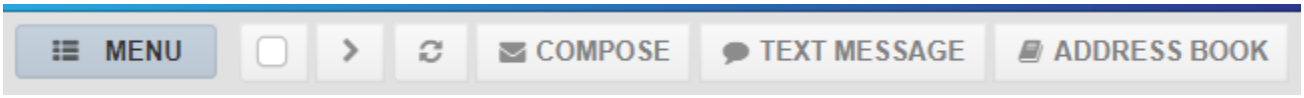
	SMS text messaging is not a HIPAA compliant communication method. It should not be used to sen patient protected healthcare information (PHI).

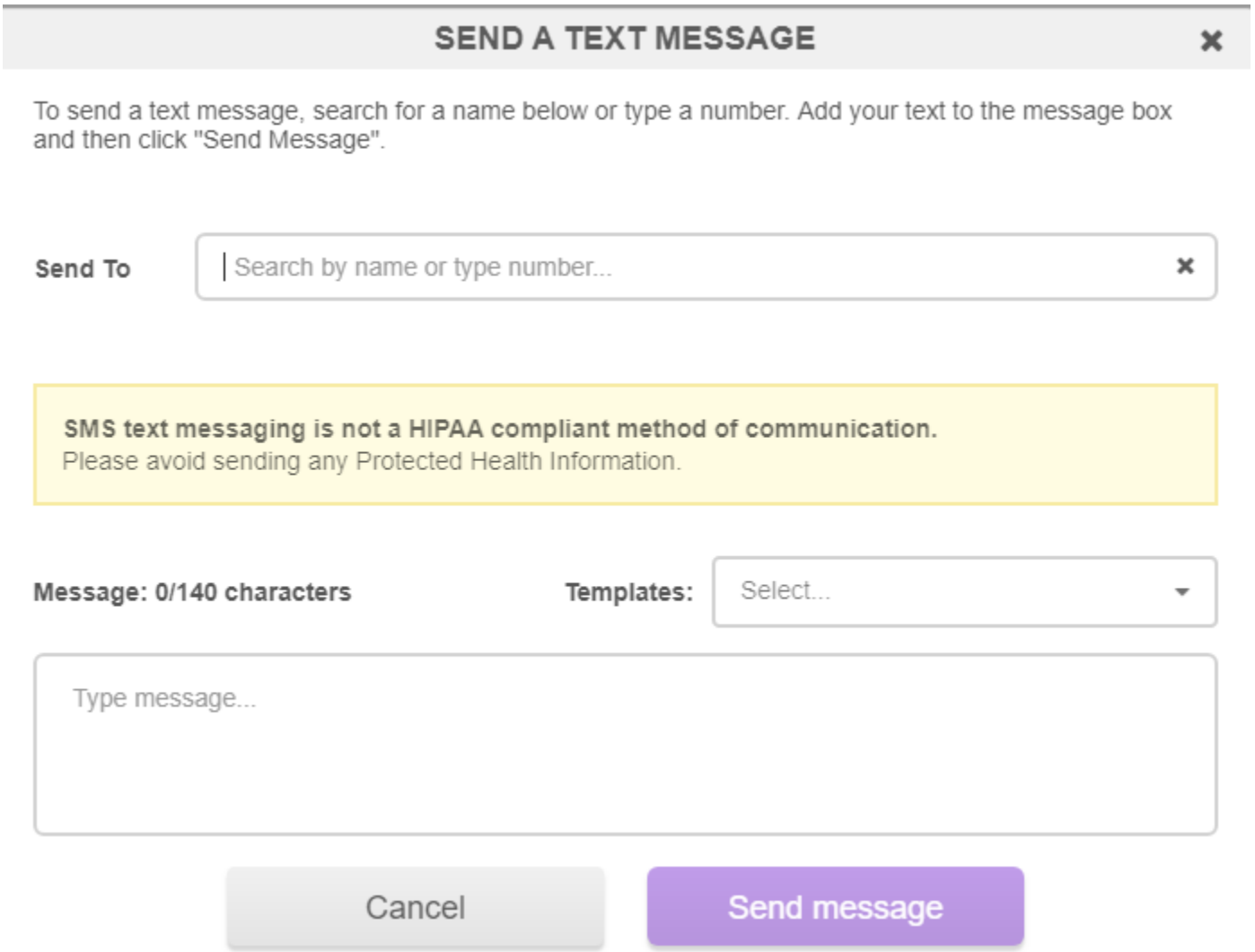
For information on using Updox Secure Text, please see the **Secure Text** section of this guide.

Location: Home Page

To send a text message.

1. Click **Text Message** (on the tool bar).
2. **Send To** - search for a contact or enter a cell phone number (note: search results only return contacts with a cell phone number on file).
3. **Send From** - if your implementation is using Locations, the Send From prompt is presented to let you select the location from where the message is being sent. Any replies received will be routed to the location's Inbox (instead of the practice Inbox). The next time you send a text message, the last location selected will be your default and you may accept it or select another location.
4. **Message** - enter the text message (up to 140 characters). You can also use any templates you have created that are shorter than the 140 character limit.
5. To finish, click **Send Message** or **Cancel**.





Upload Documents to the Workspace

The application provides several ways documents can be put in the Workspace:

Upload Documents to the Workspace

Location: Workspace

There are several ways items can be put in the Workspace:

- Drag & drop
- Print to the virtual printer
- Compose then attach a file from your computer
- Document auto-upload folder
- Fax auto-upload folder
- Send a Direct message
- Send a fax
- Send a message from the patient portal

Drag & Drop

Drag and drop a document from your computer to the Workspace. The easiest way to do this is to:

1. Open the folder on your computer.
2. Open this application.
3. Arrange the desktop so you can see both the folder and your Workspace in the application.
4. Click, hold, and drag the file over to your to your Workspace then release the click.

If your document is in Microsoft Word format, its best to save it as a .pdf file before dragging & dropping into Updox.

Print to a Virtual Printer

By using a virtual printer defined for this application you can directly print into your Workspace. To use this option you must first set up the virtual printer.

1. Open the file on your computer.
2. Initiate the print process.
3. Select the virtual printer.
4. Click Print.

Compose

Compose a message then attach a file from your computer.

Place a File in the Document Auto-Upload Folder

This option is available only when Updox Central is installed. It is as simple as copying a file into a specific folder defined in the configuration.

Place a Fax in the Fax Auto-Upload Folder

This option is available only when Updox Central is installed. It is as simple as copying a fax into a specific folder defined in the configuration.

Send a Direct Message

Send a Direct message from another application to your Direct address.

Send a Fax

Send a Fax to the fax number associated with this application. This option is only applicable if you're using the fax feature.

Send a Message from the Patient Portal

Send a secure message from the patient portal. This option is only applicable if you're using a patient portal associated with this application.

Appointment Calendar

The Appointment Calendar is an add-on feature to manage appointments.

Scheduling/Appointment Calendar

This section contains information on configuring the Appointment Calendar.

Scheduling Setup Checklist

Location: Admin

You need Admin privileges to complete this function.

Setup steps:

- ? In Scheduling under the Rules tab, define your time zone, calendar sync, patient notifications, and patient self-scheduling.
- ? In Scheduling under the Appt. Type tab, define your appointment types.
- ? In Scheduling under the Calendar tab, define a calendar for each provider.

Define Scheduling Rules

Location: Admin

You need Admin privileges to complete this function.

Basics

To define your scheduling rules:

1. Click **MENU** > **Admin** > **Scheduling > Rules**.
2. Select your **Time Zone**.
3. When adding, changing, or deleting an appointment you can optionally send a notification to the patient by checking the **Send created/updated notification** checkbox on the appointment detail screen. By default this field is unchecked. To change the default value to checked, click the **Send created/updated notifications by default** checkbox on this page.
4. If using the Updox Patient Portal and you want patients to view and/or confirm their appointments, check **Patients can view/confirm appointments**.
5. Select the direction(s) for syncing the calendar between this application and your EHR system (by checking the applicable box(es).
    - **Sync calendar from EMR into Updox**
    - **Sync calendar from Updox into EMR**

Patient Self Scheduling

If you want to enable a patient to manage their appointment schedule through the Updox Patient Portal

complete the following settings.

1. To turn on the patient self-scheduling feature, check **Patients can schedule appointments and ….**
2. In **Must schedule at least**, select the minimum about of time a patient can schedule in advance of the appointment. The choices are:
    - Immediate
    - 1 hour
    - 4 hours
    - 8 hours
    - 12 hours
    - 24 hours
    - 48 hours
    - 1 week
    - 2 weeks
    - 1 month
    - 3 months
3. In **Can schedule up to**, select the maximum about of time a patient can schedule into the future. The choices are:
    - 1 week
    - 2 weeks
    - 3 weeks
    - 1 month
    - 3 months
    - 6 months
    - 9 months
    - 1 year
4. In **Appointments are**, select how appointment requests from the patient are handled by the practice. The choices are:
    - Are automatically accepted
    - Are held until approved
5. In **Can reschedule/cancel up to**, select the minimum amount of before an appointment that the patient can reschedule or cancel. The choices are:
    - 1 hour
    - 4 hours
    - 8 hours
    - 12 hours
    - 24 hours
    - 48 hours
    - 1 week
    - 2 weeks
    - Never
6. In **Instructions**, enter information to display to the patient in the **Make an Appointment** section of the Patient Portal.
7. Click **Save**.

Define Appointment Types

Location: Admin

An appointment type defines the service/action that will occur in the appointment. For example: Routine Exam, Colonoscopy, Medication Check, Lunch, Meeting, etc. When an appointment is scheduled an Appointment Type is selected.

You need Admin privileges to complete this function.

To add a new appointment type:

1. Click **MENU** > **Admin** > **Scheduling > Appt. Types**.
2. Click **New Appt. Type**.
3. Enter **Name**.
4. Enter **Default Duration** in hours/minutes.
5. If patients should be able to view/select this type of appointment, check **Patients can View/Select**. Note: to use this feature it must first be enabled in the Scheduling > Rules tab.
6. If you're using patient Appointment Reminders and don't want to send a reminder for this appointment type, check **Don't send reminders for this type of appointment**.
7. If you're using patient Appointment Reminders and want to change the reminder script for this appointment type, select the script to use for each reminder method you have configured in **Reminder Rules**. Otherwise, the default Updox script will be used.
    - **Email**
    - **Home Phone Voice**
    - **Cell Phone Voice**
    - **Text**
8. Click **Save.**

To change an existing appointment type:

1. Click appointment type to change.
2. Enter changes.
3. Click **Save.**

To delete an existing appointment type:

1. Click appointment type to delete.
2. Click **Delete this appointment type**.
3. Click **Save.**

Define Calendars

Location: Admin

The Calendars tab within Scheduling lets you define the settings appropriate for each provider's calendar:

- Name
- Colors
- Days and times available
- If appointments can be viewed/scheduled from the Updox Patient Portal
- If reminders should be sent

If you're using the Amazing Charts EHR, do not use this function. Instead, calendars are managed in Amazing Charts.

You need Admin privileges to complete this function.

To add a calendar:

1. Click **MENU** > **Admin** > **Scheduling.**
2. Click **Calendars** tab.

3. Click **New Calendar**.
4. Enter **Title/Name**.
5. To change the background color of this calendar:
    - Click the box by **Background**.
    - Click a spot in the color palette to select the color.
    - Click outside the color palette box to return to the calendar definition.
6. To change the text color of this calendar:
    - Click the box by **Text**.
    - Click a spot in the color palette to select the color.
    - Click outside the color palette box to return to the calendar definition.
7. To enable patients to globally view and select appointment time on this calendar, check **Patients can View/Select**. Note: this can also be set for specific days/times in the time availability definition.
8. If you're using patient Appointment Reminders and want to turn off reminders for this calendar, check **Don't send reminders for this calendar**.
9. To define the time availability:
    - Click the plus sign (**+**) by the day of the week to define.
    - Slide the left time line circle to select the start of the available time.
    - Slide the right time line circle to select the end of the available time.
    - Check or uncheck the **Patients can View/Select** box as needed.
    - To add another available time spot for the same day click the plus sign (**+**) for that day and repeat the process.
    - Repeat this process for each day of the week to define.
10. To prevent select dates from being scheduled on your calendar, enter them as Blackout dates:
    - In the Blackout Dates section, enter a date then click **ADD**.
    - To choose a date from a calendar instead of directly entering, click in the date box.
    - If any appointments already exist on the Blackout date you select:
        - A warning message displays to let you know those appointments will be canceled.
        - If confirmed, the appointments are canceled.
        - If using Reminders, all of the reminders for those appointments will also be canceled.
    - An Inbox notification is sent listing the blackout dates and canceled appointments, if any.
    - The list of Blackout Dates display at the bottom of this section.
10. To finish, click **Save.**
11. To exit the Scheduling definition, **click Close.**

To indicate unavailable times during the day, add multiple available time blocks that don't include the unavailable times. For example, to prohibit appointments from 12:00-1:00 add the following two available time slots:

- 9:00 – 12:00
- 1:00 – 5:00

Another option, which is within the user's control, is to simply schedule a recurring appointment at the unavailable times.

To change a person's calendar:

1. Click the person's calendar to change.
2. Enter changes.
3. To add available time slots, click the plus sign (**+**) by the day of the week.
4. To remove available time slots, click the minus sign (**-**).
5. To finish, click **Save.**
6. To exit the Scheduling definition, **click Close.**

To delete a person's calendar:

1. Click the person's calendar to delete.
2. If there are future appointments on this calendar the number is displayed by the Delete this calendar button.
3. To delete, click **Delete this calendar**.
4. To finish, click **Save.**
5. To exit the Scheduling definition, **click Close.**

To exit without deleting the calendar, click **Close** without clicking **Save**.

Define Appointment Locations

Location: Admin

You need Admin privileges to complete this function.

The Appointment Locations feature lets you configure a different telephone number and address for each of your office locations to be used in appointment reminders.
This is an optional configuration setting. It is only available if your EHR vendor has implemented appointment locations with Updox.

To add a new appointment location:

1. Click **MENU** > **Admin** > **Scheduling.**
2. Click **Locations** tab.
3. Click **New Location**.
4. Enter location **Name**.
5. Enter the **Default Phone Number**.
6. Enter the **Address**.
7. If applicable, select the checkbox for: **Don't send reminders for this location's appointments**.
8. Click **Save**.

To delete an appointment location:

1. Click **MENU** > **Admin** > **Scheduling.**
2. Click **Locations** tab.
3. Click location to delete.
4. Click **Delete this location**.
5. Click **Save**.

Select Calendar(s)

Location: Appointment Calendar

To select one or more calendars to display:

1. Click **MENU** > **Appointment Calendar.**

2. Click **Calendars**.
3. Check the people's calendars you want to add.
4. Click **Close.**

Select an Appointment Date and Time

Location: Appointment Calendar

To select an appointment date:

1. Click **MENU** > **Appointment Calendar.**
2. There are multiple ways to select a date for an appointment:
    - Enter the date in **Current Day**.
    - Click **Today +**, then select a time period to add to the current date.
        - 1 week
        - 2 weeks
        - 3 weeks
        - 1 month
        - 3 months
        - 6 months
        - 9 months
        - 1 year
        - 2 years
    - Click the **>>** to move the calendar forward.
    - Click the **<<** to move the calendar backwards.
    - Click **Today** to return to the current date.

To select an appointment time:

1. Double click on an available time on the calendar.

Make an Appointment

Location: Appointment Calendar

To make an appointment in this application (versus the patient portal):

1. Click **MENU** > **Appointment Calendar.**
2. Find date and time for the appointment.
3. Double click the appointment time slot.
4. If the appointment date is blacked out, a message displays to let you know that date isn't available.
5. Select **Type/Category**.
6. Enter a **Description**.
7. Enter **Patient** name then select from the list.
8. To notify the patient, check **Send created/updated notification(s)**.
9. Select the provider's **Calendar.**
10. Review the default **Time**, change if needed.
11. Review the default **Duration,** change if needed.
12. Review the default **Date**, change if needed.
13. Optionally, enter **Notes**.
14. Click **Save.**

Approve an Appointment

Location: Appointment Calendar

Before an appointment requested through the patient portal is final it must first be approved by someone at the practice.

To approve an appointment:

1. Click **MENU** > **Appointment Calendar.**
2. Double click appointment to approve.
3. Click **Approve**.
4. Click **Save.**

Change an Appointment

Location: Appointment Calendar

To change an appointment:

1. Click **MENU** > **Appointment Calendar.**
2. Double click appointment to change.
3. Enter changes.
4. To notify the patient of the changes, check **Send created/updated notification(s)**.
5. Click **Save.**

Cancel an Appointment

Location: Appointment Calendar

To approve an appointment:

1. Click **MENU** > **Appointment Calendar.**
2. Double click appointment to cancel.
3. To notify the patient of the cancellation, check **Send created/updated notification(s)**.
4. Click **Cancel**.
5. Click **Save.**

Refresh Calendar

Location: Appointment Calendar

To see change that you've made while in an appointment calendar:

1. Click **Refresh**.

Display Canceled Appointments

Location: Appointment Calendar

To also see canceled appointments on an appointment calendar:

1. Check **Show Canceled**.

Print Schedule

Location: Tools

To print one or more appointment calendars:

1. Select Calendars to Print.
2. Select date range.
3. Optionally, check the box to include notes.
4. Click **PRINT**.

Blast

Blast is an add-on feature that lets you send messages to multiple patients and/or contacts all at once.

Features & Benefits

- Fully customizable. You can choose who receives the messages as well as the content of the message.
- You can send messages by different methods: Email, Patient Portal, Phone, or Text.
- Saves time and money over individual calling, phoning, or texting.
- Super easy to set up and use!

Example Uses

- To notify patients of an office closure (e.g. bad weather)
- To remind patients to come in for an annual flu shot
- To wish patients a Happy Birthday
- To let professional colleagues know you're opening a new office
- To remind patients that didn't show up for their appointment last week to reschedule
- To thank patients, who had an appointment last week, for their business

Blast Configuration

- **Setup Checklist**
- **Manage Lists**
- **Manage Templates**

Using Blast

- **Sending Blast Messages**
- **Blast Reporting**

Blast Configuration

This section walks you through the steps to configure the Blast features.

Blast Setup Checklist

Location: Admin

You need Admin privileges to complete this function.

Setup steps for Blast messaging:

? Create one or more **lists** of Blast message recipients or use one of the pre-defined lists
? Create **templates** for common messages you want to send (optional)

It's that easy!

Blast Configuration - Manage Lists

Location: Admin

You need Admin privileges to complete this function.

This function lets you manage lists of patients (and/or contacts) for Blast messaging.

Pre-defined Lists

The following lists are pre-defined AND automatically refresh as information changes.

- All Contacts
- All Females
- All Males
- All Patients
- Today's Birthdays
- This Week's Birthdays
- This Month's Birthdays

If your practice uses this application for Scheduling or Appointment Reminders, these lists are also available and automatically refreshed:

- Today's Appointments
- Tomorrow's Appointments
- Next 7 Days' Appointments
- Next 30 Days' Appointments
- Yesterday's Appointments
- Last 7 Days' Appointments
- Last 30 Days' Appointments

Add a Custom List

1. Click **MENU** > **Admin** > **Blast Configuration**.
2. On the **Lists** tab, click **New**.
3. **Title** - Enter a title that describes the list. Avoid using a title that is the same as a pre-defined list.
4. **Age** - Use this filter to select patients based on an age range. To select all ages enter 0 - 150. If a non-numeric character is entered it will automatically be deleted.
5. **Sex** - Use this filter to select patients based on sex (Male, Female, Other). To select all sexes, check all three boxes. (The 'Other' box selects patients that don't have a sex specified.)
6. **Add Additional Individual Names Here** - To add additional patients and/or contacts from the Address Book enter their name, email or phone then select from the list of results.
7. When finished, click **Save**.

   The list of patients and/or contacts meeting your criteria are listed on the screen.
   - **Remove** - To prevent someone on the list from receiving the message, click the Remove button before their name.
   - **Restore** - To restore someone you removed, click the Restore button before their name.
   - **Filter** - To find someone in the list, enter one or more of the following: First Name, Last Name, Email, Phone number then click **Search**. To return to the full list click **Clear Search**.
   - **List Analytics** - The following counts display at the bottom of the screen. To view the details of a count, click the **Download** icon for that item. These analytics will help you correct missing information.
     - **List Total** - total count in the list
     - **All Emails** - total count with an email address
     - **All Home Phone** - total count with a home phone number
     - **All Cell Phone** - total count with a cell phone number
     - **No Email** - total count that do **not** have an email address
     - **No Home Phone** - total count that do **not** have a home phone number
     - **No Cell Phone** - total count that do **not** have a cell phone number
     - **All Removed** - total count that you have removed from the list

While the pre-defined lists automatically refresh as information changes, the lists that you create include only the patients that met the criteria at the time the list was created.
See the steps below to Refresh your list.

Refresh List

1. Select the list to refresh.
2. Uncheck then recheck one of the fields.
3. Click Save.

Change List

1. Select the list to change.
2. Change the criteria as needed.
3. Click Save.

Inactivate List

1. Select the list to inactivate.
2. Click the **Deactivate** button.
3. Click Save.

Reactivate List

1. Select the list to reactivate.
2. Click the **Activate** button.
3. Click Save.

Blast Configuration - Manage Templates

Location: Admin

You need Admin privileges to complete this function.

This function lets you manage templates for common messages that you want to send. Using templates are optional but can save you time.

Add Template

1. Click **MENU** > **Admin** > **Blast Configuration**.
2. Click **Templates** tab.
3. Click **New**.
4. Select the type of template to create (Email, Patient Portal, Telephone, or Text).
5. **Template Name** - Enter a descriptive name for your template.
6. **Subject** - Enter a Subject.
7. **Message** - Enter your message text. Use the available variables to personalize the message.
    - Email Templates - To format the message text, use the text editing tools.
    - Phone Templates - To hear a preview of the message, enter a phone number then click **PREVIEW**.
    - Text Templates - To see a preview of the message, click **PREVIEW TEXT**, then click **OK**.
8. Click **Save**.

Variables

- **[fullname]** - The patient's first and last name *(not available on text templates)*
- **[firstname]** - The patient's first name
- **[lastname]** - The patient's last name *(not available on text templates)*
- **[practicename]** - The name of the practice
- **[practicephone]** - The practice telephone number

Text Editing Tools

Text Editing Tools	
B	Bold the selected text.
I	Italicize the selected text.
~~S~~	Strike through the selected text.
U	Underline the selected text.
↺	Undo.
↻	Redo.

Change a Template

1. Select the template to change.
2. Make the changes.
3. Click Save.

Inactivate Template

1. Select the template to inactivate.
2. Uncheck **Active**.
3. Click Save.

Blast Configuration - Manage Scheduled Messages

Location: Admin

You need Admin privileges to complete this function.

When a **Blast message is sent** using one of the pre-defined recipient lists, there is an option that enables the message to automatically be repeated on a scheduled basis (weekly or monthly). This function lists those scheduled messages and lets you stop a message from repeating.

1. Click **MENU** > **Admin** > **Blast Configuration**.
2. Click **Schedules** tab. The messages set to be repeated are listed along with the date created.

3. To stop a message from repeating, click the X.

Using Blast

This section reviews the Blast messaging features.

Sending Blast Messages

Location: Menu

This function lets you send messages to multiple patients and/or contacts by email, patient portal, telephone, or text message.

Send Message

1. Click **MENU** > **Blast**.
2. Select the method to deliver your message (**Email**, **Patient Portal**, **Telephone**, or **Text**). Note: telephone messages are sent to both the home phone and cell phone.
3. **Respect patients' communication method** - Choosing No, sends a message to the selected patients regardless of their preferred communication method (defined in the Address Book or Patient Portal). Selecting Yes, only sends the message to patients when their preference matches the method you're using. Note: this field is relevant only if the Reminders product is also implemented.
4. **Send To** - Select one of the **pre-defined** recipient lists or one that your practice has created. Lists are created in **Blast Configuration**.
5. **Set to Repeat** - This option lets you schedule the message to be sent repeatedly on a daily (select lists), weekly, or monthly basis. The repeat message will be sent at 9:00 am on the same day of the week/month as the initial Blast message. When using this feature the Filter by Appointment option is not available. To see a list of the scheduled messages and optionally stop them from repeating, go to **Admin > Blast Configuration > Schedules**.
6. **Subject** - Enter a Subject.
7. **Filter by Appointment** - (Optional) If you use appointment scheduling or appointment reminders in this application, you can optionally use this field to select patients based on appointment information:
    - **Appointment Date From**
    - **Appointment Date To**
    - **Practice Calendars** - Select All Calendars or a specific calendar.
    - **Appointment Type** - Select All Appt Types or a specific appointment type (e.g. annual exam).
8. **Message Template** - (Optional) Use this field to select a **pre-defined template** for the message text.
9. **Message** - If you selected a Message Template, the text will automatically display and you can further customize as needed. If you didn't select a template, enter your message text. To personalize the message, use the available **variables**. If you're sending an Email message, you can use the **text editing tools** to format the text. The message length can be up 140 characters (Pharmacy Connect up to 280 characters).
10. Click **Send**.
11. A notification displays asking for confirmation that the Blast messages complies with HIPAA (i.e. does not contain protected healthcare information; it's OK if you're sending to the Patient Portal) and the **Federal Communication Commission Telephone Consumer Protection Act** (no robotic calls or texts that are considered telemarketing).

	If a patient or contact does not have the corresponding contact information on file (e.g. Email address), the message will not be sent to them.

Pre-Defined Message Lists

The following message lists are pre-defined and automatically updated as information changes:

- All Contacts *
- All Females *
- All Males *
- All Patients *
- Today's Birthdays *
- This Week's Birthdays
- This Month's Birthdays

If your practice uses this application for Scheduling or Appointment Reminders, these lists are also available:

- Today's Appointments
- Tomorrow's Appointments
- Next 7 Days' Appointments
- Next 30 Days' Appointments
- Yesterday's Appointments *
- Last 7 Days' Appointments
- Last 30 Days' Appointments

* Indicates the list can be sent daily as well as weekly or monthly.

Variables

- **[fullname]** - The patient's first and last name *(not available on text messages)*
- **[firstname]** - The patient's first name
- **[lastname]** - The patient's last name *(not available on text messages)*
- **[practicename]** - The name of the practice
- **[practicephone]** - The practice telephone number

Text Editing Tools

Text Editing Tools	
	Bold the selected text.
	Italicize the selected text.
	Strike through the selected text.
	Underline the selected text.
	Undo.
	Redo.

	Use the **Blast Reporting** function to view information about the messages sent.

Blast Reporting

Location: Menu

The Blast Reporting function lets you see a summary, as well as, details about the Blast messages sent.

To run the report:

1. Click **MENU** > **Blast Reporting**.
2. **Type** - Select either Daily or Date Range.
3. **Dates** - Enter the date(s).
4. **Filter** - To limit the report to a specific patient or contact, enter their First Name, Last Name, and/or Contact Info.
5. Click **RUN REPORT**.

Summary Report

The summary report provides the following counts:

- Total Messages
- Delivered Messages
    - Answered
    - Delivered
    - Left Message
- Undelivered/Failed
    - Error
    - Undelivered
- Pending
    - Queued - these are messages that are still in the process of being sent

Detail Report

To view a list and details about the messages sent, click on an item in the Summary. The following information displays for each message.

- Name
- Phone Number/Email
- Method (Email, Phone, Portal, or SMS) Note: SMS indicates it was a text message.
- Sent Date
- Status

The report can be sorted by clicking any of the column headings.

Faxing

This section contains information on configuring and using the fax solution.

Faxing Configuration

This section provides information on configuring your fax solution and managing your fax bundles.

Fax Setup Checklist

Location: Admin

	You need Admin privileges to complete this function.

Setup steps for faxing:

- ? Decide if you want to port your existing fax number or use a new number.
- ? If porting, complete the **Port Your Fax Number** process.
- ? As an alternative, you can use **Fax Call Forwarding** instead of porting or getting a new number.
- ? **Define Fax Settings**
- ? **Define Fax Coversheet**
- ? **Add a Fax Bundle** if your account doesn't automatically calculate your bundles.
- ? Optional if you want to send the same fax to multiple contacts - Create an **Address Book Group** containing one or more contacts.

Faxing Configuration Management

This section walks you through the steps to configure your faxing solution.

Define Fax Settings

Location: Admin

	You need Admin privileges to complete this function.

To define your fax settings:

1. Click **MENU** > **Admin** > **Fax Settings.**
2. In **Route To**, select the location where incoming faxes are to be routed.
    - The location may be a Workspace, Queue, or a specific User.
3. In **Tag,** optionally select a color flag to assign to incoming faxes.
4. Click **Save.**

Define Fax Coversheet

Location: Admin

A fax coversheet is the first page that is automatically sent with each fax. Typically, it includes:

- From
- To
- Subject
- Date
- Instructions
- Disclaimers

	You need Admin privileges to complete this function.

	From time to time we may add new fields to the Fax Coversheet. To use those fields you'll need to click RESET TO DEFAULT then enter your customizations again. To prevent overwriting your custom coversheet we don't add them automatically.

Add a Fax Coversheet

To add a new fax coversheet:

1. Click **MENU** > **Admin** > **Fax Coversheet.**
2. Click **NEW.**
3. Enter the **Coversheet Name** (it must be unique).
4. A fax template displays that you may edit or save as is.
    - The information in the brackets { } are variables that are automatically set when a fax is sent. Obviously, you need to keep the 'from' and 'to' information. You may delete the subject and/or instructions if not needed.
        - {fromName}
        - {fromFax}
        - {toName}
        - {toFax}
        - {subject}
        - {currentDate}
        - {Instructions}
    - The current date is automatically added below the Subject.
    - The information at the bottom is the default disclaimer. You may edit or replace as needed.
    - To erase prior changes and return to the default template, click RESET TO DEFAULT.
    - Use the following text editing tools to format your coversheet:
4. To set this coversheet as the default when sending faxes, check **Primary Cover Sheet**.
5. Click **SAVE.**

Text Editing Tools	
	Undo
	Redo

	Insert a Hyperlink
	Unlink
B	Bold
I	Italicize
U	Underline
~~S~~	Strikethrough
	Insert/Remove Numbered List
	Insert/Remove Bulleted List
	Decrease Indent
	Increase Indent
	Align Left
	Align Center
	Align Right
	Align Justify
	Insert Horizontal Line
	Insert an Image
Size	Font Size
A	Text Color
A	Background Color

Edit Fax Coversheet

To edit an existing fax coversheet:

1. Select the coversheet to edit.
2. Make your changes.
3. Click **SAVE**.

Fax Call Forwarding

Location: n/a

To keep your current fax number without porting it over to your new fax service you can use call forwarding on your existing fax phone line to direct faxes to the Workspace in this application.

The preferred approach is to port your fax number instead of using call forwarding.

Though your fax machine or multi-function device (printer, scanner, fax) may have a call forwarding function we recommend not using it due to potential problems.

To look up the fax number for this application you must have Admin privileges.

To set up call forwarding:

1. To find the fax number assigned to this application:
    - Click **MENU** > **Admin** > **Fax Settings**
2. Set up call forwarding to your new fax phone number:
    - Through your service provider:
        - Call your service provider (phone number should be on their bill).
        - Ask to have the call forwarded to the fax number identified in Step 1. Note: they may charge a fee for this service.
    - Manually:
        - From a phone connected to your fax phone line, dial ***72**.
        - Enter the fax number identified in Step 1.

Port Your Fax Number

Location: n/a

For your new faxing service you have the option to keep your current fax number or get a new number. To keep your current number we can "port" it from your prior service provider. Here are a few things to note before you make your decision:

- It takes approximately 14 days to complete the process.
- After the process is complete your current fax service, fax machine, or other devices connected to that line will no longer be operational. Your previous service provider will end your charges on that date.
- We do not charge any fees to port your fax number.

To port your fax number:

1. Send an email to porting@updox.com with the following information:
    - Fax number to port
    - Person's name at your organization who is authorizing the number port
    - Your name
    - Your email address
    - Your telephone number
    - Current service provider information:
        - Company name
        - Your account #

- Exact name and address as shown on your billing statement
- Your company's billing contact phone # on file with the provider
- Attach the following documents:
  - Copy of your most recent bill for the fax line
  - Signed letter of authorization instructing us to port the number

2. We will contact you by email once the process is complete.

The Blocklist - Mark a Fax Number as Spam

Location: Admin

The Blocklist function lets you automatically route incoming faxes from a specified fax number directly into the Spam folder. Faxes from blocked numbers will not be seen in the Inbox or in any Queue.

	You need Admin privileges to complete this function.

To mark an incoming fax number as Spam.

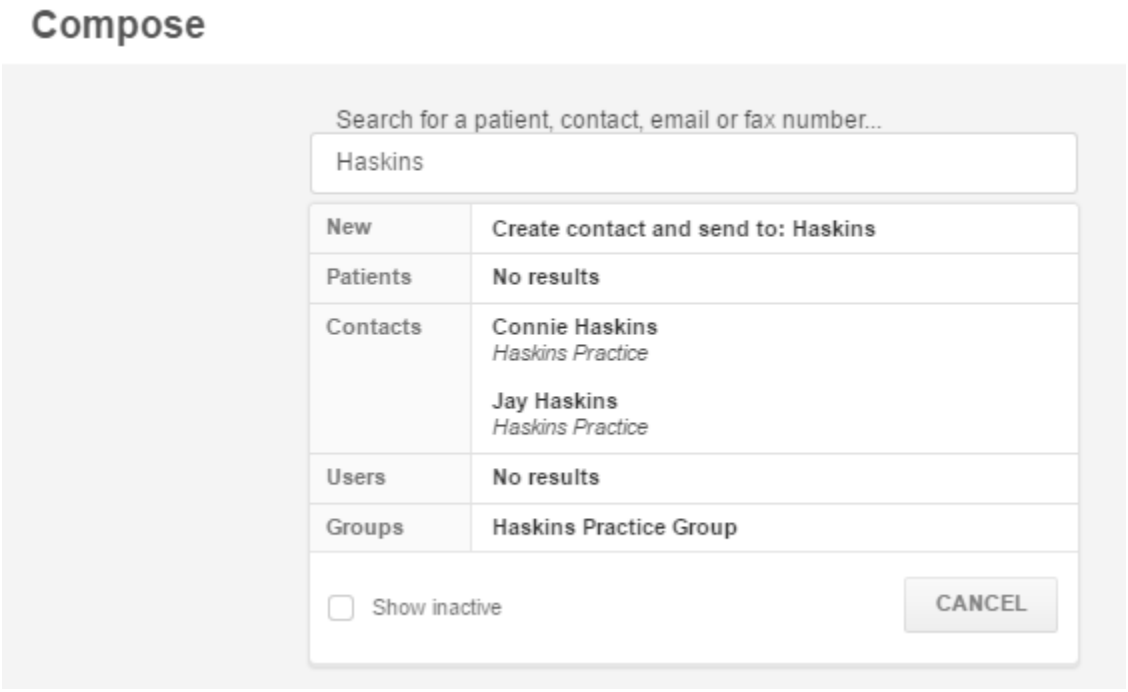
1. Click **MENU** > **Admin** > **The Blocklist.**
2. Enter the fax number to block.
3. Click **Save**.

Contact Groups

Location: Address Book

A Contact Group enables you to send the same fax to multiple contacts at once.

- To add a Contact Group, go to the **Address Book**.
- To **send a fax** using a Contact Group, search for the recipient and select one of your Contact Groups.



Fax Bundle Management

This section reviews how to add and remove fax bundles.

Add a Fax Bundle

Location: Admin

The Add a Fax Bundle feature lets you increase the base amount of fax pages that are included in your monthly billing. Each bundle is 500 pages.

	This feature will not be available if your account automatically calculates fax bundles.

	You need Admin privileges to complete this function.

To add a fax bundle:

1. Click **MENU** > **Admin** > **Billing.**
2. Click **Add Bundle**.
3. Repeat process to add additional bundles.
4. Click **Save.**

To remove a fax bundle:

1. Click **MENU** > **Admin** > **Billing.**
2. Click **Remove Bundle**.
3. Repeat process to remove additional bundles.
4. Click **Save.**

If you are not the account holder, the following error message displays:

Send a Fax

Location: Workspace

Sending a fax is very easy and you can do it from multiple places: Compose, Send Item, Address Book. You can send a fax to an individual contact or to a contact group. A contact group enables you to send the same fax to multiple contacts at once. Contact groups are set up in the **Address Book**.

	The fax configuration must be completed before faxing is enabled.

Send a Fax

1. Go to Compose, Send Item or the Address Book.
2. In the **Search** box enter the fax number, contact name, or contact group name.
3. If this is a new number you can either 1) create a new contact to store the number in your Address Book or 2) send without saving the contact.
    - To create a new contact, click **Create contact and send to**, then fill in the contact information.
    - To send the fax without creating a contact, click **Quick send to**.
4. If the fax number already exists in the Address Book, select the contact or the contact group from the search results list (if multiple ones are listed), then check **Send fax to** and click **OK.**
5. Enter **Subject**.
6. Check desired settings:
    - **Send "history" comments (usually not used)**
    - **Send Coversheet**
    - **Send as practice**
7. Select the fax delivery method:
    - **Send paper fax and allow online access** (default)
    - **Just online**
    - **Just paper**
8. Select the **Fax Coversheet** to use or just accept the default.
9. Enter **Notes** (optional).
10. **Add attachments** as needed.
11. Click **SEND.**
12. You will receive a separate notification confirming the fax was sent to each recipient (which includes the number of pages faxed).

Adding Item to the Workspace to Fax

If the item isn't in your Workspace yet, use one of the following methods to upload it:

- Drag and drop the item into your Workspace.
- Print the item to the Updox Virtual Printer (see the Add a Virtual Printer article if not already configured).
- If you have Updox Central installed:
    - Copy the item to the fax auto-upload folder
    - Scan the item to the fax auto-upload folder. (If a scanner is set up to do so.)

A copy of the message with the attached cover sheet and fax pages is placed in the Sent folder.

When searching for an address that results in multiple entries for the same recipient, click on the c
the Direct address. There are separate contacts in the Address Book for each contact method. For
Direct address, an email address, and a fax number there will be 3 separate contacts.

ReSend a Fax

Location: Workspace

Have you ever had a recipient misplace a fax that you sent? No worries, it is extremely easy to resend that same fax to the same recipient. It works for both successful and failed faxes.

ReSend a Fax

1. Go to the Sent folder.
2. Open the fax item that you want to resend.
3. Click RESEND FAX.

Add Contact from Fax

Location: Workspace

You can quickly add a contact to your Address Book for an incoming fax by clicking the icon following the fax number:

Fax Confirmation Page

Location: Workspace

A fax confirmation page is used to document the transmission of a specific fax from sender to receiver.

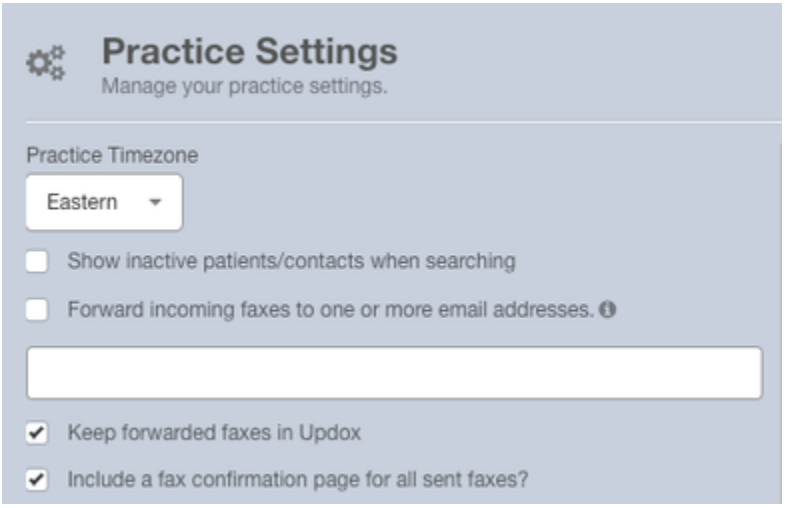
Retrieving a fax cover page (manually)

1. Shortly after a fax has been successfully sent, the fax confirmation page will be appended to the message in the send folder along with a button to retrieve the fax confirmation.
2. To retrieve the fax confirmation, click the **RETRIEV**E button.
3. Once the page has been retrieved it can be viewed and/or sent like any other page. However, it can not be edited.
4. The data from the faxing service is only available for 14 days, so it must be retrieved before that time.

Note: There is no per page charge for the confirmation.

Retrieving fax cover pages automatically

1. In the Practice Settings menu check the box to "**Include a fax confirmation page for all sent faxes**".
2. Once this option has been selected the system will automatically retrieve fax confirmations at a set interval (5 minutes).



Internal Forms

The Internal Forms function lets you send previously defined forms (either blank or with the fields completed) to others via message Compose.

Internal Forms

The Internal Forms function lets you send previously defined forms (either blank or with the fields completed) to others via message Compose.

To set up forms, go to Admin > **Forms Management**.

To send a form:

1. Click **MENU** > **Internal Forms**.
2. Select an available form.
3. Complete the form fields or leave blank.
4. If you want a printed copy of the form, click PRINT.
5. Click SEND. The Message Compose window opens.
6. Select the recipient:
    - Recent list - click name if present.
    - Search - enter the recipient's name or email address in the Search box, then click name to select.
    - If the recipient doesn't exist, click **New**.
6. Select the send method then click **OK**. Note: the methods available will vary depending on the recipient selected (contact or patient) and their contact information.
    - **Compose - Email Message**
    - **Compose - Patient Portal Message**
    - **Compose - Save to EHR**
    - **Compose - Save to Disk**
    - **Compose - Direct Message**
    - **Compose - Fax**
7. Click **SEND**.

Messenger

Messenger is a secure, intra-office messaging product that brings together all your team communications into one place, increasing productivity and staff collaboration.

Messenger supports:

- One to one messaging
- Group messaging
- Channel messaging, based on teams, topics or workflows
- Attachments (video files, images, documents, audio files)

Accessing Messenger

To access Messenger:

1. From the inbox, select the Messenger bar found on the bottom of the screen. You can select a full screen display or a partial screen display.
2. From the Messenger landing page you have the option to view prior chat activity from the Messenger menu, start a new message, or create a new channel.

To use Messenger from your mobile device, browse to chat.myupdox.com.

Creating and Sending Messages

To send a new message:

1. Select **NEW MESSAGE**.
2. Select the person that you want to chat with.
3. To create a group chat, add additional recipients.
4. Enter the message and **SEND**.

The staff directory is auto-populated with users who have logged into Updox at least one time. If you cannot locate someone in the staff directory, they have most likely not logged in since Messenger was activated for your organization.

Select the paper clip to add an attachment to your message. Most file types are supported, but have a maximum size of 50 MB.

To continue a chat:

1. Previous messages and group chats will be listed in messenger.
2. Select any of them to continue the conversation and view the history of all previous messages.

Creating a Channel

Messenger can be organized into channels based on topics, teams, workflows or whatever makes sense for your office. Channels are permanent groups with the added flexibility of being able to add and remove members as needed.

Creating a new channel from the Messenger menu:

1. Select the **+** sign beside Channels to create a new channel.
2. Name your channel and select the members of the group.
3. Designate whether the channel is public or private. Any user can see and chat with a public channel. You must be a member of a private channel to chat with that channel.

Private channels are displayed with a lock in the Messenger menu.

Adding a member to an existing channel:

1. Go to the Messenger menu.
2. Select the channel.
3. Select the people icon at the top of the screen.
4. Select **INVITE PEOPLE**.
5. Search for the members you want to add.
6. Select **INVITE** to add the new members to the channel.

Patient Payments

Patient Payments is an add-on feature that lets you process credit card payments from a patient either in the office or via the patient portal . There are three convenient methods to make a payment:

1. Swipe & Pay
2. Make a Payment
3. Create a Custom Payment Plan

Swipe & Pay

Uses a secure card reader to scan a credit card and make a payment for an office charge. The amount is entered at the time of payment.

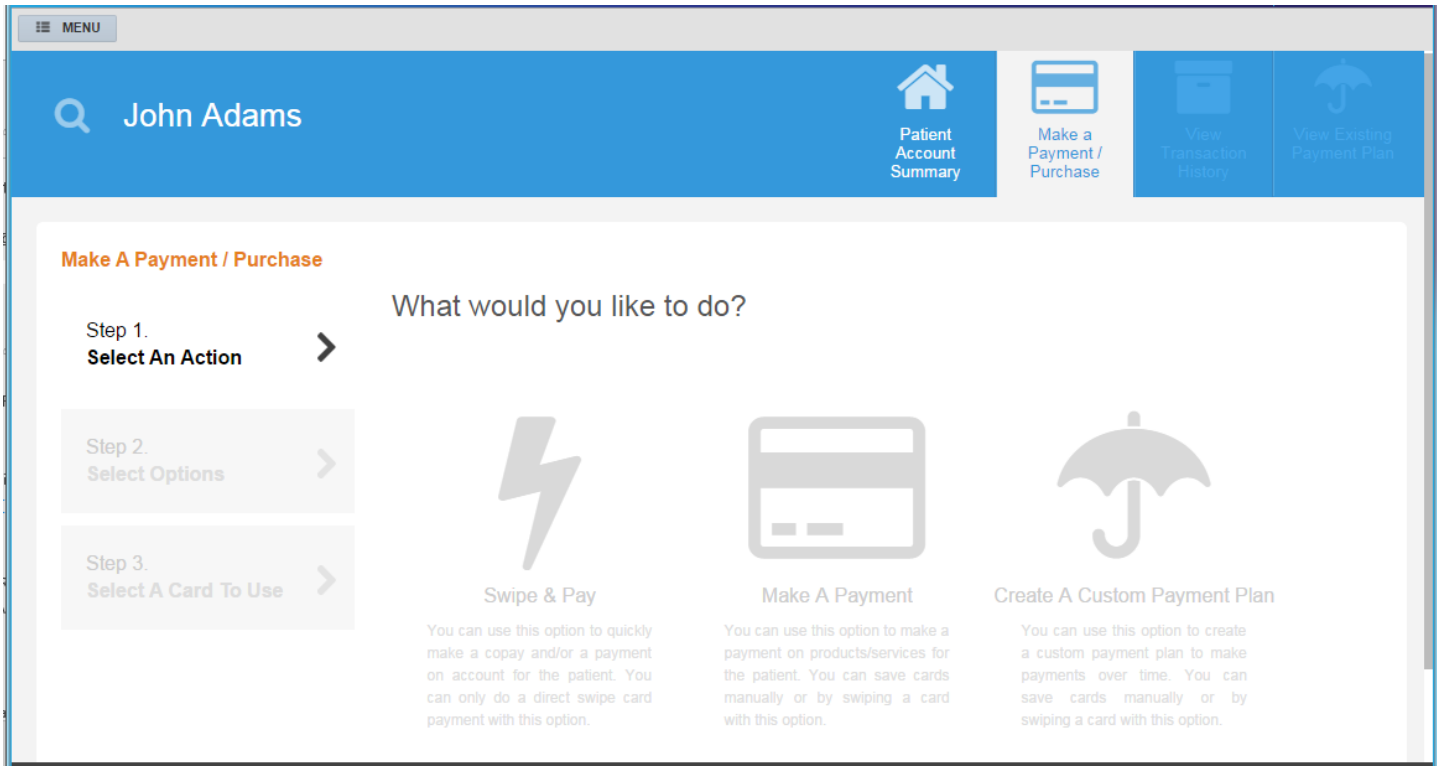
Make a Payment

Offers the same features as Swipe & Pay plus you can manually enter a card and purchase products, services and/or memberships.

Custom Payment Plan

Lets you set up a payment plan for a patient and spread the payments over a specified number of months.

If you don't already have this valuable feature and are interested in increasing your cash flow, give our Sales team a shout out.



Patient Payments Configuration

This section walks you through the steps to configure the patient payments feature.

Patient Payment Setup Checklist

Location: Admin

You need Admin privileges to complete this function.

Setup steps for Patient Payments:

- ? Purchase the Patient Payments feature.
  - You will be issued a merchant ID.
  - Your secure card readers and package information will be shipped to you by our payment processing partner.
- ? Define the Patient Payment Settings.
- ? Define User Settings.
- ? Define Products, Services, and/or Memberships. (optional)
- ? Plug the card reader(s) into the computer(s).

Define Patient Payment Settings

Location: Admin

You need Admin privileges to complete this function.

To define your patient payment settings (all fields are optional unless otherwise noted):

1. Click **MENU** > **Admin** > **Patient Payment Settings.**
2. To place limits on a single patient payment, enter:
   - **Minimum payment amount** and/or
   - **Maximum payment amount**

   If there aren't any limits leave these fields blank.
3. If selling taxable products or services enter a **Sales Tax Percentage**.
4. Select the patient portal payment options to use:
   - ? **Allow patients to make payments on the patient portal without logging in**
     - This option enables other people without access to the patient's portal (e.g. family members) to make payments on behalf of the patient.
   - ? **Allow logged in patients to set up payment plans on the patient portal**
     - This option lets the patient create their own payments plans. If not checked the Payment Plans tab in the patient portal is not available.
   - ? **Allow patients to purchase memberships**
     - If checked define at least one membership. If not checked the membership fee section on the Make a Payment tab in the patient portal is not available.
5. Select the in office payment options to use:
   - ? **Print receipts by default for all in office payments**
6. In the **Office Charges** text box, enter the name of one or more items that a user can select when making a payment (e.g. Co-Pay, Balance Due).
   - At least one entry is required.
   - To define multiple items, press <Enter> after each item.
   - Office charges can be paid via all the payment methods (Swipe & Pay, Make a Payment, Create a Payment Plan).
   - Office charges are the only items that can be paid by the Swipe & Pay payment method.
   - The amount is entered at the time of payment since it varies by patient.
   - If an item has a standard charge, set it up as a product, service, or membership which has pre-defined charges the user cannot change.
7. In the **Route Payment Notifications** field select the location to send notifications when a patient makes a payment. It can be the Practice Inbox, a Queue, or an individual user.

8. Select **Accepted credit cards** (Visa, Master Card, Discover Card, American Express) to control which card type images display in the patient portal.
9. Use the **Thank you text** box to customize the thank you message on the patient payment receipt.
10. Click **Save.**

Gift cards cannot be used even if issued by a credit card vendor (e.g. VISA).

Define Patient Payment User Settings

Location: Admin

You need Admin privileges to complete this function.

To define your patient payment user settings:

1. Click **MENU** > **Admin** > **Users.**
2. Select an existing user or add a new user.
3. Click **Settings** tab.
4. To grant a user access to the Patient Payments function, check **Can bill patient's credit cards**.
5. To grant a user access to the Patient Payments billing reports, check **Can view billing reports**.
6. Click **Save**.

Manage Patient Payment Products, Services, and Memberships

Location: Admin

You need Admin privileges to complete this function.

This feature lets you define products, services, and/or memberships that you sell to your patients. A product is something tangible like equipment or supplies. A service is something a provider performs. A membership is a recurring charge for a set period of time. Here are some examples:

Products
- Wheelchair
- Crutches
- Teeth Whitener

Services
- Office Visit
- Home Visit
- Tooth Extraction

Memberships
- Subscription-based Care
- Stress Reduction Yoga Class
- Pre-natal Class

To add a product:

1. Click **MENU** > **Admin** > **Products, Services, and Memberships.**

2. Click **New**.
3. In **Type,** select **Product**.
4. Enter **Product Name**.
5. Enter **Product Description**.
6. Check if **Sales Taxable**. The sales tax percentage defined in Patient Payment Settings pre-populates the field. If blank, either enter it here or on the Settings screen.
7. Select a **Billing Method**. If the product can be purchased as a one-time charge AND on a payment plan, set up separate products.
    - Select Single Payment if it is a one-time charge. Then enter the **Amount** to charge.
    - Select Payment Plan if it is a recurring charge over a number of months. Then enter the monthly **Amount per Payment** and **Number of Payments**.
8. Click **Save**.

To add a service:

1. Click **MENU** > **Admin** > **Products, Services, and Memberships.**
2. Click **New**.
3. In **Type,** select **Service**.
4. Enter **Product Name**.
5. Enter **Product Description**.
6. Check if **Sales Taxable**. The sales tax percentage defined in Patient Payment Settings pre-populates the field. If blank, either enter it here or on the Settings screen.
7. Select a **Billing Method**. If the service can be purchased as a one-time charge AND on a payment plan, set up a separate services.
    - Select Single Payment if it is a one-time charge. Then enter the **Amount** to charge.
    - Select Payment Plan if it is a recurring charge over a number of months. Then enter the monthly **Amount per Payment** and **Number of Payments**.
8. Click **Save**.

The following fields are automatically set:

- **Billing Method** = Payment plan
- **Frequency** = Monthly
- **Total Amount** (amount x number of payments)

To add a membership:

1. Click **MENU** > **Admin** > **Products, Services, and Memberships.**
2. Click **New**.
3. In **Type**, select **Membership Plan**.
4. Enter **Membership Name**.
5. Enter **Membership Description**.
6. Enter the monthly **Amount per Payment.**
7. Enter the **Number of Payments.**
8. Click **Save.**

The following fields are automatically set:

- **Billing Method** = Payment plan
- **Frequency** = Monthly
- **Total Amount** (amount x number of payments)

Memberships do not have a sales tax.

Be descriptive when naming membership plans and include the number of payments if offering multiple durations (e.g. Yoga Class 2 Months, Yoga Class 6 Months).

To change a product, service, or membership:

1. Click **MENU** > **Admin** > **Products, Services, and Memberships.**
2. Select item to change.
3. Enter changes.
4. Click **Save**.

To inactivate a product, service, or membership:

1. Click **MENU** > **Admin** > **Products, Services, and Memberships.**
2. Select item to inactivate.
3. Uncheck **Active**.
4. Click **Save**.

Using Patient Payments

This section provides information on using the patient payments feature in the office.

Patient Account Summary

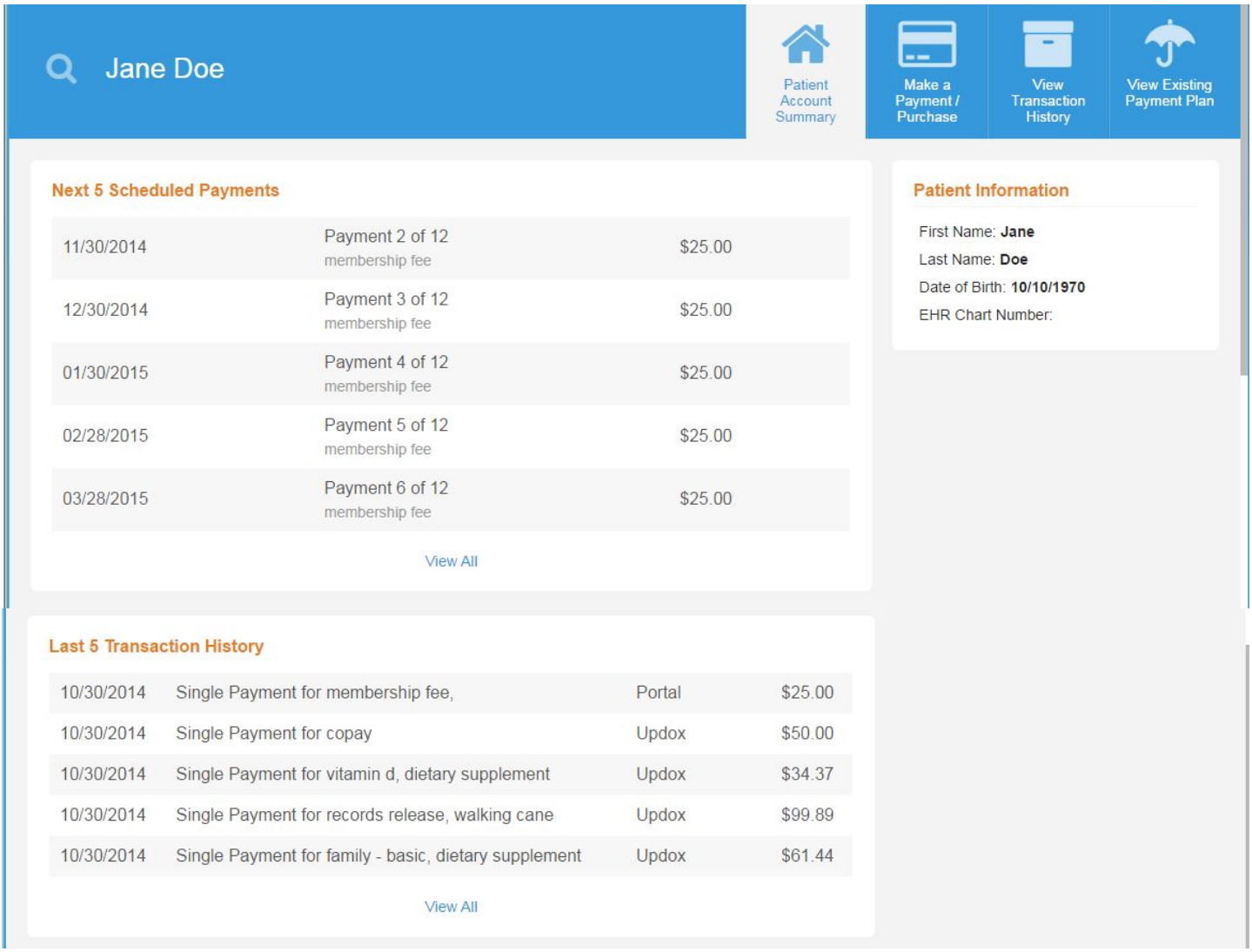
Location: Patient Payments

To view the account summary for a patient:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.

The account summary shows:

- The next 5 scheduled payments. To see more, click **View All.**
    - Date
    - Description -- if the payment is toward a payment plan, the payment number of total payments is also listed (e.g. Payment 5 of 12).
    - Payment amount
- Patient's Information
    - Name
    - Date of Birth
    - EHR Chart Number.
- The last 5 transactions. To see more, click **View All.**
    - Date
    - Description
    - Location where transaction occurred (Updox or Portal)
    - Amount



Swipe & Pay

Location: Patient Payments

Swipe & Pay enables you to quickly enter a payment for office charges (e.g. co-pay, payment on account). To pay for products, services, or memberships use the Make a Payment option.

To make a quick payment:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click **Make a Payment/Purchase**.
5. Click **Swipe & Pay**.
6. Enter the **amount(s)** to pay then **Tab**.The choices available are defined in the Office Charges section of the Patient Payments Settings.
7. Verify the secure card reader device is attached to your computer (e.g. via the USB slot).
8. Click **Swipe Card**.
9. Slide the credit card through the secure card reader device.
10. When the patient's receipt displays:
    - Select the **Destination** (i.e. printer, save as PDF, etc.)
    - Change settings as needed (e.g. number of copies, paper size, etc.)
    - Click **Print.**

Swipe & Pay doesn't save the patient's credit card for future payments.

Make a Payment/Purchase

Location: Patient Payments

To make a payment/purchase:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click **Make a Payment/Purchase**.
5. Click **Make a Payment**.
6. Select one or more items to pay.
7. Enter **Price**, if not pre-defined.
8. Change **Quantity**, as needed.
9. Enter **Comments**, as needed.
10. Click **NEXT STEP.**
11. Select an existing credit card or click Add a New Card.
12. Select **Email Receipt** and/or **Print Receipt.**
    - If email, enter the **Email Address** (don't use a Direct address).
    - If print, specify print **Destination**.
12. Click **PAY NOW.**

If you need to return to a previous page, click the PREVIOUS STEP button. Do not use the Back button on your web browser.

Add a New Card

Location: Patient Payments

Gift cards cannot be used even if issued by a credit card vendor (e.g. VISA).

To add a new card:

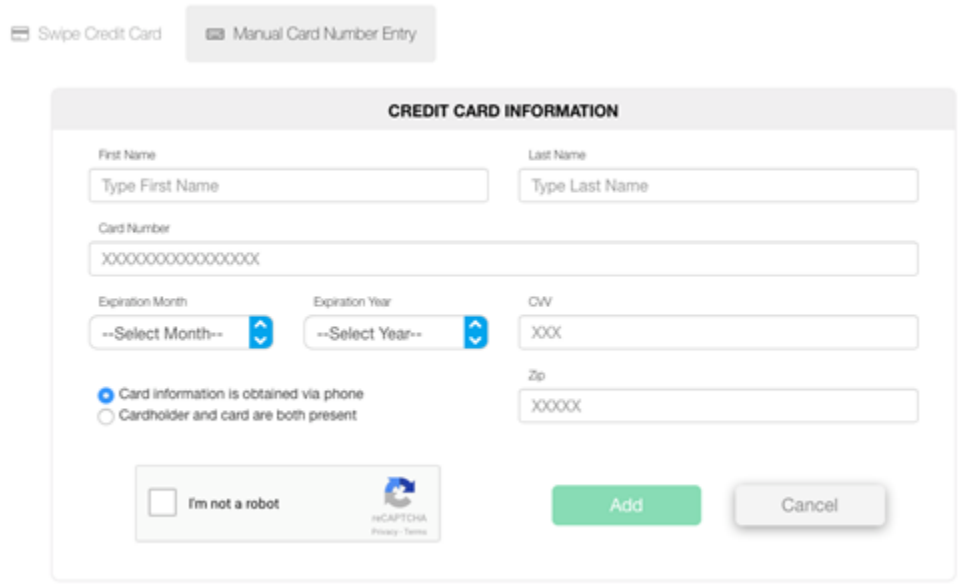
1. Select **Swipe Credit Card** or **Manual Card Entry.**
2. For Swipe Credit Card:
    - Slide the credit card through the secure card reader.
    - Click **Add**.
3. For Manual Entry, enter:
    - **First Name**
    - **Last Name**
    - **Card Number**
    - **Expiration Month**
    - **Expiration Year**
    - **CVV (3 or 4 digit security code on card)**
    - **Zip**
4. Specify how the card information was obtained:
    - Card information is obtained via phone or

- Cardholder and card are both present

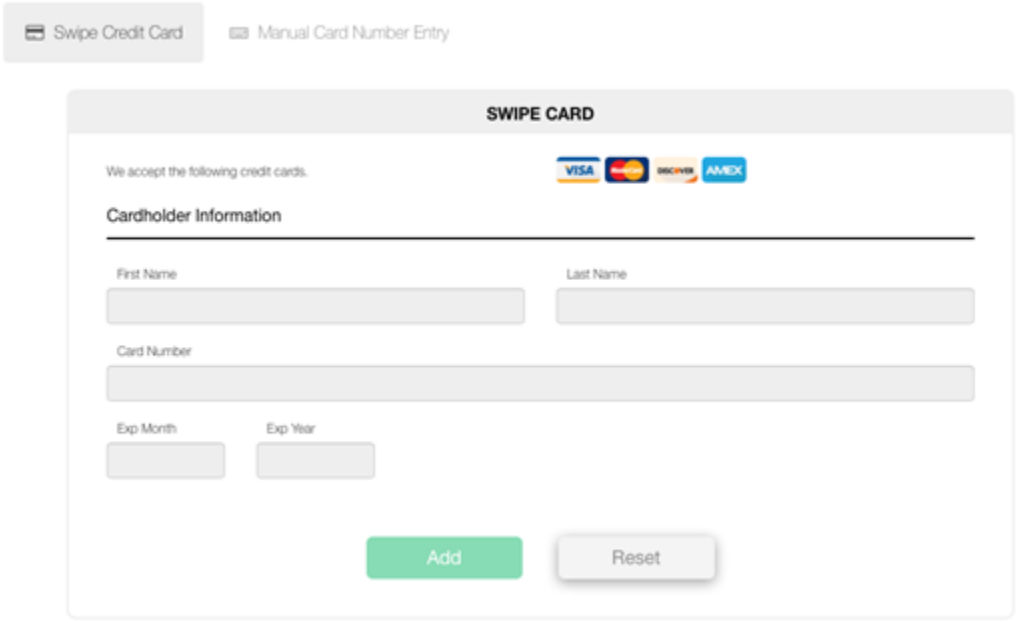
5. Click the **I'm not a robot** checkbox. This field is an added security measure.
6. Click **Add**.

	The patient's card is saved for use in making future payments.

Manual Entry



Swipe



Remove a Card

Location: Patient Payments

To remove a card:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.

4. Click Patient **Account Summary**.
5. Click **REMOVE** by the card no longer needed.

Create a Custom Payment Plan

Location: Patient Payments

This feature lets you set up a custom payment plan for a patient to pay on their account. A patient may have multiple payment plans in affect at one time particularly if they have purchased products, services, or memberships that are sold on a payment plan basis. A "custom" payment plan is separate from product/service/membership payment plans. The patient's credit card is automatically charged when the next payment installment is due.

If enabled in Patient Payment Settings, a patient can also set up their own payment plan in the patient portal.

To create a custom payment plan:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click **Make a Payment/Purchase**.
5. Click **Create a Custom Payment Plan**.
6. Enter the total **Payment Amount**.
7. Enter **Number of Payments**. (The payment amount is divided by the number of payments to get the amount to be paid with each installment.) The number must be > 1.
8. Enter **Start Date**.
9. Enter **Comments**, as needed.
10. Click **NEXT STEP**.
11. Select an existing card to use or Add a New Card.
12. Select **Email Receipt** or **Print Receipt.**
    - If email, enter **Email Address** (don't use a Direct address).
    - If print, specify print **Destination**.
13. Click **CREATE PAYMENT PLAN.**

If you need to return to a previous page, click the PREVIOUS STEP button. Do not use the Back button on your web browser.

View Existing Payment Plan

Location: Patient Payments

The **View Existing Payment Plan** shows a list of the selected patient's payment plans along with the ability to cancel a plan.

- Date of payment plan
- Status (active or inactive)
- Description
- Total Amount
- Number of payments to be made and the amount to be paid with each installment (e.g. 12 x $25.00)
- Number of remaining payments
- Last four digits of the credit card
- Credit card expiration date

To view a patient's existing payment plan(s):

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click **View Existing Payment Plan**.

Cancel a Payment Plan

Location: Patient Payments

Canceling a payment plan prevents any "future" payments from being made against that plan. There's no affect on the "previous" payments made. If there is a remaining balance you need to decide how to handle it, for example:

- Create a new payment plan for the balance with a revised number of payments.
- Have the patient make a single payment to pay off the balance.
- Make the patient's day and forgive the remaining balance.

To cancel a patient's payment plan

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click **View Existing Payment Plan**.
5. For the plan to be canceled, click **Cancel Plan**.

View Transaction History

Location: Patient Payments

The View Transaction History shows a list of the selected patient's transactions beginning with the most recent to the oldest. It has the same information as seen on the Patient Account Summary plus the ability to void or refund a payment.

- Date
- Order ID
- Description
- Location where transaction occurred (Updox or Portal)
- Last 4 digits of credit card number
- Amount

To view transaction history:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click **View Transaction History**.

To search for a specific transaction:

1. Enter Order ID or transaction date.

To void or refund a payment:

1. Click VOID/REFUND.

Void/Refund a Payment

Location: Patient Payments

If a payment needs to be reversed it can either be voided or refunded. If the payment is reversed on the same day (before 2am Eastern Time), it will be voided (the person's credit card will not be charged). If the reversal is done later, a refund will be issued (the person will see both a charge and a refund on their credit card). The system automatically determines which action to take.

Full or partial refunds are permitted on transactions without sales tax. Only full refunds are permitted on transactions that include sales tax.

To void/refund a payment:

1. Click **MENU** > **Patient Payments.**
2. Enter patient name in Search box.
3. Select patient from list.
4. Click View **Transaction History.**
5. Click the **VOID/REFUND** button by payment to be reversed.
6. Enter a **Reason**.
7. To confirm, click **Yes** or **No**.

A notification is sent to the Inbox when a refund is issued.

Payment Notifications

Location: Inbox

A message is sent to the practice when the following payment related actions occur:

Patient Portal

- Payment is made
- Payment Plan is changed or canceled
- Payment Plan payment is changed or canceled
- The start date of a payment plan is nearing

Inbox

- Payment is made
- Payment Plan is added, changed, or canceled
- Payment Plan payment is changed or canceled
- Payment is voided or refunded
- The start date of a payment plan is nearing
- Payment fails

	Notification messages can be sent to the practice Inbox, a Queue, or an individual user's Inbox. The destination is defined in the Route Payment Notification field in Patient Payment Settings.

Patient Payments Transaction Report

Location: Tools

The Patient Payments Transaction Report lists all the payment activity for a single day. The report includes the following information for each transaction:

- Date
- Time
- Order ID
- Original Order ID
- Status
- Notes
- Patient Name
- Credit card type (e.g. Visa)
- Last 4 Digits of credit card
- Amount
- Sales Tax

The report also includes the total amount of payments (minus refunds and voids) and total sales tax.

To print a daily transaction report for patient payment activity:

1. Click **MENU** > **Tools** > **Patient Payments Transaction Report**.
2. Select **Type**.
    - All Transactions
    - Successful Transactions
    - Refunded Transactions
3. Select **Date** or **Date Range**.
4. Enter the date(s).
5. Click **SEARCH**.
6. To print the report, click **PRINT**.
7. To refresh the report with recent changes, click **REFRESH**.

Product/Services Report

Location: Tools

The Product/Services Report lists the purchase activity for a specified date range. The report includes the following information:

- Purchase Date
- Patient Name
- Quantity
- Purchase Amount
- Sales Tax
- Total Amount by Product/Service
- Total Sales Tax by Product/Service
- Grand Total Amount
- Grand Total Sales Tax

To print a daily transaction report for patient payment activity:

1. Click **MENU** > **Tools** > **Patient Payments Transaction Report**.
2. Select **Type**.
    - All Transactions
    - Successful Transactions
    - Refunded Transactions
3. Enter date range.

4. Select Product/Services Report.
5. Click **Search**.
6. To print the report, click **PRINT**.
7. To refresh the report with recent changes, click **REFRESH**.

Patient Portal

This section contains information about the Patient Portal.

Patient Portal Configuration

This section walks you through the steps to configure the Patient Portal.

Define Portal Settings

Location: Admin

You need Admin privileges to complete this function.

To define the patient portal settings:

1. Click **MENU** > **Admin** > **Patient Portal.**
2. Under the **General** tab:
    - Click **Enable Practice Portal**.
    - **Portal URL** - This field is used to construct the URL that patients will use to access the portal. Enter the portion of that URL that identifies the practice.
        - Examples: abcpractice, abcportal, or abc
        - Try to keep it short
    - **Custom Logo** - To show your company's logo on the patient portal, do one of the following:
        - Send your logo image to Updox to load or
        - Place your logo image on a web server then enter the full pathname to that file in the **Custom logo URL** field. Note: This must be an https:// address.
    - **Name Displayed** - Enter the practice name to display in the patient portal.
    - Check the options to enable:
        - **Enable 'Message Read' Notifications**
        - **Allow patient to create new messages**
        - **Allow patients to reply to messages**
        - **Allow patients to fill out forms**
        - **Allow patients to view records**
        - **Allow patients to send updated demographics/insurance information**
        - **Allow patients to self-register their portal account**
        - **Allow patients to send messages to multiple recipients**
    - **Add users patient can send portal messages to** - check the users you want patients to be able to contact via Secure Messaging from the patient portal. To search for someone, enter the person's name.
3. Under the **About Us** tab:
    - Click the options to enable:
        - **Show basic contact info**
        - **Show our work number -** If selected, enter phone number
        - **Show our fax number -** If selected, enter fax number
        - **Show our email address -** If selected, enter an email address
        - **Show custom "About Us" information**
            - If selected, enter the additional information.

- Use the text editing tools to format (see below).

4. Under the **Hours** tab:
    - To display the practice hours, click **Show our hours** then check the days of the week the practice is open and enter the start and end times.
5. Under the **Portal Accounts** tab:
    - To automatically create patient portal accounts for every patient with an email address, check **Automatically create Portal Accounts for Patients with an email address**.
        - The process that creates the accounts for your existing patients (that have a valid email address) will run during the night after the setting is saved.
        - Each patient will receive an email notification about their portal account.
    - To customize the email notification sent to patients about their new account:
        - Check **Include Additional "New Account" Text**
        - Enter the information.
        - Use the text editing tools to format the text (see below).
        - This information will appear at the bottom of the email after the standard text.
    - To customize the email notification sent to patients each time they receive a message:
        - Check **Include Additional "New Message" Text**
        - Enter the information.
        - Use the text editing tools to format the text (see below).
        - This information will appear at the bottom of the email after the standard text.
6. Click the **Preview** button to see a preview of the Patient Portal based on your configuration settings.
7. Click **Save.**

Text Editing Tools	
	Bold the selected text.
	Italicize the selected text.
	Strikethrough the selected text.
	Underline the selected text.
	Rotate the coversheet counter-clockwise.
	Rotate the coversheet clockwise.
	Insert a hyperlink.
	Remove a hyperlink.

Form Management

This section describes how to add, edit, and inactivate forms.

Form Management

Location: Admin

The Form Management function lets you create custom forms for use in the Patient Portal, provider Web Application, or both.

- **Patient Portal Forms** - these forms let you collect information from patients and/or caregivers. After the user completes the form it is sent to the practice.
- **Provider Web Application (Internal) Forms** - these forms are completed by practice employees and then transmitted to others using the same methods available under **Compose** (fax, email, Direct message, secure message to the Patient Portal).

You need Admin privileges to complete this function.

To add a Form:

1. Click **MENU** > **Admin** > **Forms Management.**
2. Click **New Form**.
3. Complete the following fields:
    - **Title** - enter a unique name for the form
    - Form Type - select one or more
        - **Active (Portal)** - this option places the form "within" the Patient Portal (i.e. user must log in to access).
        - **Public (Portal)** - this option places the form on the login page of the Patient Portal (i.e. anyone can access).
        - **Active (Internal)** - this option places the form in the provider's Web Application under Menu > Internal Forms.
    - **Submit To** - specifies where the form should be sent (specific user, **queue,** or the practice Inbox (default)).
    - **Route To** - lets you assign a **tag** to the form.
4. To design your form:
    - Click **Add a field**.
    - **Type** - select the type of field to add.
        - Single-Line Text
        - Multi-Line Text
        - Date Picker
        - Label/Instructions
        - Section Heading
        - Spacer
        - Check Box
        - Radio Button List
        - Check Box List
    - **Label** - enter the name of the field.
    - **Required** - check the box to require an entry in the field.
    - **Description** - enter instructions to the user.
    - **Key** - skip this field.
    - Click the **X** to close the field window.
    - Repeat this step for each field.
5. To edit a field, click the pencil icon.
6. To delete a field, click the minus sign icon.
7. To finish the form, click **Save**.

To change a Form:

1. Click **MENU** > **Admin** > **Forms Management**.
2. Click the form to change.
3. To change the form header information, click in the field.
4. To change a field in the body of the form, click the pencil icon by the field.
5. To delete a field, click the minus sign icon.
6. To finish, click **Save**.

To duplicate a Form:

1. Click **MENU** > **Admin** > **Forms Management**.
2. Click the form to duplicate.
3. Click **Duplicate** button.
4. Change the name of the form.
5. Change/add other fields as needed.
6. To finish, click **Save**.

To inactivate a Form:

1. Click **MENU** > **Admin** > **Forms Management**.
2. Click the form to inactivate.
3. Uncheck the form types: Active (Portal), Public (Portal), Active (Internal).
4. Click **Save**.

To delete a Form:

1. Click **MENU** > **Admin** >**Forms Management**.
2. Click the form to delete.
3. Click **Delete**.
4. Click **Save**.

Inviting Patients to the Patient Portal

Location: Various

There are two ways to invite patients to your Patient Portal:

- Auto-create
- Individually via the Address Book

Auto-create

To invite patients automatically:

1. Go to **Admin** > **Patient Portal**.
2. Click **Portal Accounts** tab.
3. Check **Automatically create Portal Accounts for Patients with an email address**.
4. Click Save.

   Once this setting is turned on, any patient who has an email address in the system and doesn't already have a patient portal account will be sent an email invitation to create their account.

Individually via Address Book

To manually invite patients on an individual basis:

1. Go to **Address Book**.
2. Enter patient's name in the Search box.
3. Select the patient from the search results list.
4. Click **Patient Portal** tab.
5. Click **CREATE ACCOUNT**.

Re-inviting a Patient to the Patient Portal

Location: Address Book

Re-Invite Patient to the Patient Portal

To resend the Patient Portal invitation email to a patient:

1. Go to **Address Book**.
2. Enter patient's name in the Search box.
3. Select the patient from the search results list.
4. Click **Patient Portal** tab.
5. Click **RE-INVITE**. (If the RE-INVITE button isn't present verify the patient's email address is on file.)

Re-inviting Non-participating Patients to the Patient Portal

Location: Admin

You need Admin privileges to complete this function.

To help promote patient usage of the Patient Portal you can automatically resend portal invitations to all patients who have been previously invited but have not logged in at least once.

To turn on this feature:

1. Go to **Admin > Patient Portal**.
2. Click **Portal Accounts** tab.
3. Uncheck the box: **Opt out of automatically re-inviting patients to the patient portal.**
4. Select the **Amount of days before re-inviting** (30 days, 60 days, or 90 days).
5. Click **Save**.

Sending to the Patient Portal

This section reviews the ways to send a message to the Patient Portal.

Send a Message to Patient Portal

Location: Home Page

To send a message to a patient in the patient portal:

1. Click **Compose**
2. In the **Search** box enter the **patient's name** then select in the list.

3. Click **Send to portal**.
4. Click **OK**.
5. Enter a Subject.
6. Uncheck **Send as Practice**.
7. To attach one or more documents, check **Include attachments**.
8. To be alerted if the patient doesn't view the message within a certain amount of time, select the time period in: **If this item is not viewed in the portal, alert me in.**
9. Enter the message text.
10. Click **SEND**.

Send a Patient Portal Broadcast Message

Location: Tools

To send a broadcast message to all patients with a portal account.

1. Click **MENU** > **Tools** > **Patient Broadcast**.
2. Select the **Send From** (practice or myself).
3. Enter a **Subject**.
4. Enter the **Message**.
5. Click **Send**.

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.

Send CCD To Patient Portal (non-integrated EHR)

Location: Workspace

To send a patient's Continuity of Care Document (CCD) to the Updox Patient Portal from a non-integrated EHR:

1. In your EHR system create a CCD for the patient.
2. Download that CCD to your workstation.
3. Log into Updox.
4. Drag & drop the CCD from your workstation into the Updox Inbox.
5. Refresh the Updox screen (e.g. <Ctrl> R).
6. In the Workspace, click on the **>** to expand the item.
7. Click **Send to Portal.**
8. Delete the CCD from your workstation.
9. If applicable also delete the CCD from the Recycle Bin on your workstation.

	The Send to Portal button is only active if the patient's name, date of birth, and gender within the CCD matches to a patient in the Updox Patient Portal.

	To protect patient privacy don't keep patient protected information (PHI) on your workstation. Also enable your workstation's disk encryption or install 3rd party software to encrypt the disk when the workstation shuts down.

Meaningful Use Measures Reporting

The Meaningful Use Measures Reporting in this application is intended for practices that use an EHR system that is **not** integrated with the Updox Patient Portal (i.e. the EHR doesn't use the Updox API to pull the measure data into the EHR's measure calculations) but the EHR system does have functionality to sync patients with Updox.

MU Measures

Meaningful Use Measures are a requirement for participation in the Medicare and Medicaid Meaningful Use Incentive Program. The purpose of the measures is to evaluate a provider's performance in key areas.
A measure consists of a denominator and a numerator. The denominator is the "total" population during the reporting period (e.g. patients seen by the eligible provider). The numerator is the "subset" of that population that meets additional criteria (e.g. patients who received a secure message).

To calculate the Patient Portal related measures information is needed from both the EHR system and Updox. The EHR system has the information needed to calculate the denominator (e.g. which providers saw which patients when). Updox has the information to calculate a "raw" numerator. It is considered a "raw" numerator since Updox doesn't have the denominator information to filter the results.

There are three MU measures associated with the Patient Portal:

Measure	Denominator	
Patient Access	The number of patients seen by an eligible provider during the reporting period.	The number of patients in th every office visit to view onl on the payment incentive pr Advancing Care Information within 4 business days of w ACI, the deadline is reduced In Updox, the patient is inclu summary (CCD) from the pra information from their EHR s timeliness deadline.
View, Download, Transmit	The number of patients seen by an eligible provider during the reporting period.	The number of patients in th party their health informatic In Updox, the patient is inclu or transmitted a clinical rec
Secure Messaging	The number of patients seen by an eligible provider during the reporting period.	**Before 2015** - The number c Patient Portal to the provide **2015** - Not a percentage- ba Messaging is enabled (Y/N) **After 2015** - The number of Patient Portal from a provid

* Healthcare information refers to the Continuity of Care Document (CCD) that you create within your EHR system. It includes clinical info such as the patient's problems, medications, allergies, lab results, etc.

Do not use the Meaningful Use Measures Reporting within Updox if your EHR software is integrated with the Updox Patient Portal. You'll want to use your EHR's reporting instead.

In the annual MU Attestation for each provider, **do not** use the values directly from the Updox reports. There are **additional steps** to calculate the measures.

These values are considered "raw" numerators since additional information is needed from your EHR system to completely calculate the measure (i.e. which patients did each provider see during the reporting period).

Meaningful Use (MU) Measure Summary

Location: Admin

You need Admin privileges to complete this function.

The Meaningful Use Measures Reporting in this application is intended for practices that use an EHR system that is **not** integrated with the Updox Patient Portal (i.e. the EHR doesn't use the Updox API to pull the measure data into the EHR's measure calculations) but the EHR system does have functionality to sync patients with Updox.

To view the summary report

1. Click **MENU** > **Admin** > **MU Measures Reporting.**
2. Select the incentive program.
3. Select the reporting period **Date Range** (beginning in 2015 the start and end date must be in the same calendar year since some calculations vary by year).
4. Click **Search**.

To download the report:

1. Click **DOWNLOAD CSV**.
2. Save the file to your computer.
3. To view the downloaded report, open the file using a program that can read a Comma Separated Value (CSV) file (e.g. Microsoft Excel).

Do not use the Meaningful Use Measures Reporting within Updox if your EHR software is integrated with the Updox Patient Portal. You'll want to use your EHR's reporting instead.

In the annual MU Attestation for each provider, **do not** use the values directly from the Updox reports. There are **additional steps** to calculate the measures.

These values are considered "raw" numerators since additional information is needed from your EHR system to completely calculate the measure (i.e. which patients did each provider see during the reporting period).

Patient Access Measure Detail

Location: Admin

You need Admin privileges to complete this function.

The Meaningful Use Measures Reporting in this application is intended for practices that use an EHR system that is **not** integrated with the Updox Patient Portal (i.e. the EHR doesn't use the Updox API to pull the measure data into the EHR's measure calculations) but the EHR system does have functionality to sync patients with Updox.

The Patient Access measure pertains to the Patient Portal. It evaluates the number of patients who have online access to their healthcare information for every office visit in a timely manner. Healthcare information refers to the Continuity of Care Document (CCD) that you create within your EHR system then send to the Updox Patient Portal. It includes clinical info such as the patient's problems, medications, allergies, lab results, etc.

The timeliness limit depends on the payment incentive program the provider is reporting. For Meaningful Use (MU) Stage 2 and the Advancing Care Information category in MIPS for the transition year (ACI Transition), the deadline is within 4 business days of when the information became available to the provider. For MU Stage 3 and ACI, the deadline is reduced to within 48 hours.

This report lists the patients included in the raw numerator for the selected Incentive Program and reporting period date range. The report columns are:

- Patient Name
- Date of Birth
- EHR ID
- Date Received (i.e. the Continuity of Care Document [CCD])
- CCD Document ID

To view the report:

1. Click **MENU** > **Admin** > **MU Measures Reporting.**
2. Select the **Incentive Program**.
3. Select the reporting period **Date Range**.
4. Select the report: **Patient Access Detail**.
5. Click **Search**.

To download the report:

1. Click **DOWNLOAD CSV**.
2. Save the file to your computer.
3. To view the downloaded report, open the file using a program that can read a Comma Separated Value (CSV) file (e.g. Microsoft Excel).

Do not use the Meaningful Use Measures Reporting within Updox if your EHR software is integrated with the Updox Patient Portal. You'll want to use your EHR's reporting instead.

	In the annual MU Attestation for each provider, **do not** use the values directly from the Updox reports. There are **additional steps** to calculate the measures. For Meaningful Use Stage 3 and ACI, this measure also needs to count patients who have access to their healthcare information through 3rd party applications connected to the EHR system via application program interfaces (APIs). Contact your EHR vendor for information on how to calculate that part of the measure. These values are considered "raw" numerators since additional information is needed from your EHR system to completely calculate the measure (i.e. which patients did each provider see during the reporting period).

Meaningful Use View, Download, Transmit Measure Detail

Location: Admin

	You need Admin privileges to complete this function. The Meaningful Use Measures Reporting in this application is intended for practices that use an EHR system that is **not** integrated with the Updox Patient Portal (i.e. the EHR doesn't use the Updox API to pull the measure data into the EHR's measure calculations) but the EHR system does have functionality to sync patients with Updox.

The View, Download, Transmit measure pertains to the Patient Portal. It evaluates the number of patients who did access (view, download, or transmit) their healthcare information online. Healthcare information refers to the Continuity of Care Document (CCD) that you create within your EHR system then send to the Updox Patient Portal. It includes clinical info such as the patient's problems, medications, allergies, lab results, etc.

This report lists the patients included in the raw numerator for the selected Incentive Program and reporting period date range. The report columns are:

- Patient Name
- Date of Birth
- EHR ID
- View Date
- Download Date
- Transmit Date

To view the report:

1. Click **MENU** > **Admin** > **MU Measures Reporting.**
2. Select the **Incentive Program**. (This measure is not applicable to MU Stage 1.)
3. Select the reporting period **Date Range**.
4. Select the report: **View, Download, Transmit Detail**.
5. Click **Search**.

To download the report:

1. Click **DOWNLOAD CSV**.
2. Save the file to your computer.
3. To view the downloaded report, open the file using a program that can read a Comma Separated Value (CSV) file (e.g. Microsoft Excel).

	Do not use the Meaningful Use Measures Reporting within Updox if your EHR software is integrated with the Updox Patient Portal. You'll want to use your EHR's reporting instead.

	In the annual MU Attestation for each provider, **do not** use the values directly from the Updox reports. There are **additional steps** to calculate the measures. These values are considered "raw" numerators since additional information is needed from your EHR system to completely calculate the measure (i.e. which patients did each provider see during the reporting period).

Meaningful Use Secure Messaging Detail

Location: Admin

	You need Admin privileges to complete this function. The Meaningful Use Measures Reporting in this application is intended for practices that use an EHR system that is **not** integrated with the Updox Patient Portal (i.e. the EHR doesn't use the Updox API to pull the measure data into the EHR's measure calculations) but the EHR system does have functionality to sync patients with Updox.

The Secure Messaging measure pertains to the Patient Portal.

- Before 2015 - It evaluates the number of patients who have **sent** a secure electronic message from the portal **to their provider**.
- 2015 - Secure Messaging is not a percentage based measure (thus not in the measure summary).
- After 2015 - It evaluates the number of patients who have **received** a secure electronic message into the portal **from their provider**.

This report lists the patients included in the raw numerator for the selected Incentive Program and reporting period date range. The report columns are:

- Patient Name
- Date of Birth
- EHR ID
- Sender
- Message Date

To view the report:

1. Click **MENU** > **Admin** > **MU Measures Reporting.**
2. Select the **Incentive Program**. (This measure is not applicable to MU Stage 1.)
3. Select the reporting period **Date Range**.
4. Select the report: **Secure Messaging Detail**.
5. Click **Search**.

To download the report:

1. Click **DOWNLOAD CSV**.
2. Save the file to your computer.
3. To view the downloaded report, open the file using a program that can read a Comma Separated Value (CSV) file (e.g. Microsoft Excel).

	Do not use the Meaningful Use Measures Reporting within Updox if your EHR software is integrated with the Updox Patient Portal. You'll want to use your EHR's reporting instead.

	In the annual MU Attestation for each provider, **do not** use the values directly from the Updox reports. There are **additional steps** to calculate the measures. These values are considered "raw" numerators since additional information is needed from your EHR system to completely calculate the measure (i.e. which patients did each provider see during the reporting period).

Calculate Measures

Location: N/A

If your EHR is not integrated with the Updox Patient Portal there are some additional steps to calculate the Measures for each provider.

In your EHR system:

1. The crucial first step is to export a report from your EHR listing the patients seen by the eligible provider during the reporting period. The report must contain the same EHR ID used in Updox. Each patient must be listed only once even if seen by the provider multiple times. It's OK if the report contains additional information. The easiest report format to work with is Comma Separated Value (.csv) since these files can easily be opened in Microsoft Excel.
2. If your EHR doesn't support exporting as a .csv file, explore other ways of getting the information into an Excel spreadsheet (e.g. use the Get External Data functions in Excel to pull the data in from other formats, copy and paste the data from your EHR report into Excel).
3. Save the report in an Excel format and name the file to identify the provider and reporting year.
4. Repeat step 1 for each eligible provider.

In Updox, in the MU Measures Reporting function:

1. Select the MU stage, reporting period start and end dates, then click Search.
2. Go to the Patient Access Detail report, click Download CSV, then save the file in an Excel format.
3. Go to the View, Download, Transmit Detail report, click Download CSV, then save the file in an Excel format.
4. Go to the Secure Messaging Detail report, click Download CSV, then save the file in an Excel format.

In Excel:

1. Open the spreadsheet containing the information from your EHR system for one of the providers.
2. Rename the first tab to DenEHR. Then move the patient's EHR ID to column A if not already there.
3. Add a second tab and rename it UpdoxAccess.
4. Add a third tab and rename it UpdoxVDT.
5. Add a fourth tab and rename it UpdoxSM.
6. Add a fifth tab and rename it NumAccess.

7. Add a sixth tab and rename it NumVDT.
8. Add a seventh tab and rename it NumSM.
9. Open the Updox Patient Access Detail spreadsheet and copy the data into the EHR spreadsheet on the UpdoxAccess tab.
10. Move the EHR ID column to column A.
11. Open the Updox View, Download, Transmit Detail spreadsheet and copy the data into the EHR spreadsheet on the UpdoxVDT tab.
12. Move the EHR ID column to column A.
13. Open the Updox Secure Messaging Detail spreadsheet and copy the data into the EHR spreadsheet on the UpdoxSM tab.
14. Move the EHR ID column to column A.

Note: The tab names must be exact as stated above since they are referenced in Excel formulas later in these instructions.

Patient Access (NumAccess tab)

After completing the steps below this tab will list the patients seen by the provider who also meet the numerator criteria for the Patient Access measure. The EHR report (DenEHR tab) contains the list of patients seen by the provider. The Updox report (UpdoxAccess tab) lists the patients who have access to their healthcare information through the Patient Portal. The formula finds which patients are common to both reports.

1. Click the first cell in column A and enter the following formula:
   =VLOOKUP(UpdoxAccess!A:A,DenEHR!A:A,1,FALSE)
2. Copy the formula down column A for the same number of rows on the DenEHR tab (hover over the right lower corner of the first cell, when the cross hair displays, click it then drag down).
3. Next, you will sort the data to move all rows containing #N/A to the bottom. However, since cells containing a formula can't be re-sorted do the following:
   - Copy column A and paste into column B using the Paste Special/Paste Value 123 option (that removes the formula).
   - Delete column A.
   - Sort the data from A-Z.

Denominator = the number of patients on the DenEHR tab
Numerator = the number of patients on the NumAccess tab (don't count the header row or the rows with #N/A)

View, Download, Transmit (NumVDT tab)

After completing the steps below this tab will list the patients seen by the provider who also meet the numerator criteria for the View, Download, Transmit measure. The EHR report (DenEHR tab) contains the list of patients seen by the provider. The Updox report (UpdoxVDT tab) lists the patients who have either viewed, downloaded, or transmitted their healthcare information through the Patient Portal. The formula finds which patients are common to both reports.

1. Click the first cell in column A and enter the following formula:
   =VLOOKUP(UpdoxVDT!A:A,DenEHR!A:A,1,FALSE)
2. Copy the formula and sort same as above.

Denominator = the number of patients on the DenEHR tab
Numerator = the number of patients on the NumVDT tab (don't count the header row or the rows with #N/A)

Secure Messaging (NumSM tab)

After completing the steps below this tab will list the patients seen by the provider who also meet the numerator criteria for the Secure Messaging measure. The EHR report (DenEHR tab) contains the list of patients seen by the provider. The Updox report (UpdoxSM tab) lists the patients who have received a secure message from the practice through the Patient Portal. The formula finds which patients are common to both reports.

1. Click the first cell in column A and enter the following formula:
   =VLOOKUP(UpdoxSM!A:A,DenEHR!A:A,1,FALSE)
2. Copy the formula and sort same as above.

   Denominator = the number of patients on the DenEHR tab
   Numerator = the number of patients on the NumSM tab (don't count the header row or the rows with #N/A)

REPEAT THE SPREADSHEET STEPS FOR EACH ELIGIBLE PROVIDER PARTICIPATING IN THE INCENTIVE PROGRAM.

Notifications

This section reviews notifications regarding the Patient Portal.

User Validation Failed

To further protect a patient's healthcare information, Patient Portal users must enter the patient's birthdate the first time they log in, each time their password is reset, and if the name and/or birthdate has changed since the last patient sync.
If the user fails to enter a matching birthdate after five tries, their Patient Portal account will be locked and a notification message will be sent to the Practice Inbox about the failed validation.

Action Items

1. Investigate why the patient's birthdate is incorrect. It may have simply been a typo or something more serious may have occurred (e.g. a database restore overwrote the patient's account with another patient's data).
2. If only the birthdate is incorrect, update it then reset the patient's password.
3. If it appears that another patient's data is in the account, immediately contact your EHR vendor's Support department.

Patient Portal Instructions

Welcome Email

You should receive a New Patient Portal Account email to the email address you have on file with your physician’s office. This contains a link to your Patient Portal, Initial User Name, and Initial Password. (Please note: you will be able to change your User Name and Password once you log into the Patient Portal).

How to log into your portal account

Click on or type in the web address of your physician’s patient portal you received in your welcome email. To log in to your portal account select the “Click here to login button”. Enter the Initial User Name and Initial

Password from the email you received from your physician and click “Sign in”.

For your protection and security purposes you will need to verify your account, please enter your date of birth and then click on “Verify”.

How to view messages from your physician’s office

To view your messages click on the Messages menu tab. Click on a message on the left hand column to view the contents of the message. There are several actions you can take for each message received in your inbox, including:

- Open as PDF – If you would like to save your message and any attachments click on the Open as PDF button and either Open or Save the file to your desired location. (Please note this will require Free Acrobat Reader to be installed on your computer to view the document.)
- Print a Message – If you would like to print a message click on the Print button and a print dialogue box will appear allowing you to print out the document on your desired printer.
- Forward a Message – If you would like to send a message to another doctor outside of the practice providing the patient portal, click on the Forward button. In the new window please enter the Direct secure email address of the doctor you would like to send the message to, a subject, and any message you would like to include in the email and click on the Send button. (Please note you will need to contact the doctor you would like to send the email to and obtain their Direct secure email address which is a special email address to protect your personal health information).
- Reply – If this feature is enabled on your portal you can send a message or question back to the doctor or staff by clicking on the Reply button. Enter a subject and message and click on the Send Reply button.

How to send messages to your physician’s office

If this feature is enabled in your patient portal, you can click on the Send Message link in the upper right corner of the page to send a new message to the practice. Enter a Subject and Message or Question and click on the Send button.

How to view and save your medical record

You can access your medical record by selecting the Records menu tab. You have multiple options for your record including:

- View – This will allow you to view your medical record on a secure web page
- Download Text – This will save your record in an HTML format which can be saved and viewed later using a web browser
- Download Data – This will save your record in an XML format which can be uploaded to your personal health record (i.e. Microsoft HealthVault, Dossia, etc)
- Transmit – This will allow you to send your medical record to another doctor using a new email technology called Direct. Simply call the doctor you wish to send your record to and ask for their Direct secure email address. Click on the Transmit button and enter the Direct Address, a Subject and Message and it will be delivered to the doctor along with a data format of your medical record, which in many cases can be downloaded into their electronic health record system.

How to manage your account information

You can manage your profile by clicking on the My Profile link in the upper right hand corner of the page. You can edit several settings for your portal profile, including:

- User Name
- Email Address
- Password
- Time Zone
- Preferred Language
- Opt In / Out Preference
- Family Access – allow family members and caregivers access to your account

Patient Portal Grant Family Access

Location: Patient Portal

Family Access allows a patient to designate others to log into the Patient Portal on their behalf. If a patient elects to do this, the designated person will have full access to their information.

To give a family member access:

1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. The **Current Access** section shows the number of users that currently have access to your portal.
5. If your family member doesn't have an account to the Patient Portal, fill out the top part of the screen (**Create a new user**).
    - Enter the name of the person you are adding to your account.
    - Enter a Username and Password that person will use when logging onto the Patient Portal.
    - You may also enter the Reason you are adding this person to your account.
    - Optionally, you may enter a date this person's access to your account will expire.
    - Click **Create user and grant access.**
    - Repeat step 5 for additional users as needed.
    - If finished, click the X to close.
6. If your family member already has their own account to the Patient Portal, fill out the bottom part of the screen (**Grant an existing user access**).
    - Enter the **Existing username** and **Password** of the person you are adding to your account. This would be the username and password they use to log onto their own Patient Portal.
    - You may also enter the Reason you are adding this person to your account.
    - Optionally, you may enter a date this person's access to your account will expire.
    - Click **Grant Access.**
    - Repeat step 6 for additional users as needed.
    - If finished, click the X to close.

To disable a family member's access:

1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Disable** button by the person's name.

To extend the expiration of a family member's access:

1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Update expiration** button by the person's name.
5. Enter the new expiration date.

To delete a family member's access and entire account:

1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Delete** button by the person's name.

Patient Portal Grant Family Access

Location: Patient Portal

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    - Enter a Username and Password that person will use when logging onto the Patient Portal.
    - You may also enter the Reason you are adding this person to your account.
    - Optionally, you may enter a date this person's access to your account will expire.
    - Click **Create user and grant access.**
    - Repeat step 5 for additional users as needed.
    - If finished, click the X to close.
6. If your family member already has their own account to the Patient Portal, fill out the bottom part of the screen (**Grant an existing user access**).
    - Enter the **Existing username** and **Password** of the person you are adding to your account. This would be the username and password they use to log onto their own Patient Portal.
    - You may also enter the Reason you are adding this person to your account.
    - Optionally, you may enter a date this person's access to your account will expire.
    - Click **Grant Access.**
    - Repeat step 6 for additional users as needed.
    - If finished, click the X to close.

To disable a family member's access:

1. Sign onto the **Patient Portal** using the patient's Username and Password.

2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Disable** button by the person's name.

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1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Update expiration** button by the person's name.
5. Enter the new expiration date.

To delete a family member's access and entire account:

1. Sign onto the **Patient Portal** using the patient's Username and Password.
2. Click **My Profile**.
3. Next to Family Access click **Manage.**
4. Click the **Delete** button by the person's name.

Patient Payments in the Patient Portal

This section provides information on using patient payments in the patient portal.

Make a Payment and Set Up a Payment Plan in the Patient Portal

Location: Patient Portal

Instead of paying the full amount due you can optionally set up a payment plan to pay a smaller amount over a period of time. With a payment plan your credit card is automatically charged when the next payment is due. The amount and frequency of the payments are defined by you.

To set up a payment plan and make the first payment:

1. Sign into the Patient Portal.
2. Click **Make a Payment**.
3. Enter the total amount to be paid n the **Total Payment** box.
4. Enter a description of what is being paid in the **Reason** box. This will also be the name of the payment plan.
5. In **Would you like to set up a payment plan** click Yes, then:
    - Enter the **Number of Payments** (the total payment is divided by the number of payments to get the amount to pay with each installment).
    - Enter the **Start Date**
    - Select the **Frequency** (Monthly or Every 2 Weeks)
6. If you also **would like to pay a membership fee** click Yes, then:
    - Choose your M**embership Plan**
    - Enter the **Start Date**
7. Select how you would like to pay:
    - **Use an existing credit card** or
    - **Enter a new credit card**
8. If you want the receipt sent by email enter your **Email Address**.
9. Click **Continue Payment**.
10. The total charge to your card displays. If you want to make this payment click Yes.
11. If you want to print a copy of the receipt click **Print.**
12. If you have more payments to make click **Make Another Payment.**

A message is automatically sent to the practice about the payment and payment plan.

Add a Credit Card in My Profile

Location: Patient Portal

To add a new credit card:

1. Sign into the Patient Portal.
2. Click **My Profile.**
3. Click **Credit Card Info**.
4. Click **Add a Card**.
5. Enter **First name** as shown on the credit card.
6. Enter **Last name** as shown on the credit card.
7. Enter **Billing address** for the credit card.
8. Enter **Card number**.
9. Enter **Expiration date**.
10. Enter **Security code**.
11. Click **Add**.

Gift cards cannot be used even if issued by a credit card vendor (e.g. VISA).

Remove an Existing Credit Card in My Profile

Location: Patient Portal

To remove an existing credit card:

1. Sign into the Patient Portal.
2. Click **My Profile.**
3. Click **Credit Card Info**.
4. Click **Remove** for the applicable card.
5. Click **Yes** to confirm removal.

Make a Payment (Without Signing into the Patient Portal)

Location: Patient Portal

To make a payment:

1. Go to the Patient Portal web page.
2. Click **Make a Payment**.
3. Enter the **Patient Name**.
4. Enter the amount to be paid in **Total Payment**.
5. Enter a description of what is being paid (e.g. payment on account, co-pay) in **Reason**.
6. Enter credit card information.
7. If you want the receipt sent by email enter your **Email Address**.
8. Click **Continue Payment**.
9. The total charge to your card displays. If you want to make this payment click Yes.

Manage Payment Plans in the Patient Portal

Location: Patient Portal

To change an individual installment payment on a payment plan:

1. Click **Payment Plans**.
2. Expand the applicable payment plan to view the individual payments.
3. Click **Edit** by the individual payment to change.
4. Change the payment **Date** and/or **Amount.**
5. Click **Apply Changes**.

To cancel an individual installment payment on a payment plan:

1. Click **Payment Plans**.
2. Expand the applicable payment plan to view the individual payments.
3. Click **Cancel** by the individual payment to cancel.
4. If you are sure you want to cancel the payment click the **Yes, Cancel It** button.

To cancel an entire payment plan:

1. Click **Payment Plans**.
2. Click **Cancel** by the payment plan to cancel.
3. If you are sure you want to cancel click the **Yes, Cancel It** button.

A message is automatically sent to the practice about the changes.

Add a Credit Card During Payment Process

Location: Patient Portal

To add a credit card:

1. Enter **First name** as shown on the credit card.
2. Enter **Last name** as shown on the credit card.
3. Enter **Billing address** for the credit card.
4. Enter **Card number**.
5. Enter **Expiration date**.
6. Enter **Security code**.

Gift cards cannot be used even if issued by a credit card vendor (e.g. VISA).

Make a Payment in the Patient Portal (without setting up a payment plan)

Location: Patient Portal

To make a payment:

1. Sign into the Patient Portal.
2. Click **Make a Payment**.
3. In the **Total Payment** box enter the amount to be paid.
4. In the **Reason** box enter a description of what is being paid (e.g. payment on account, co-pay).
5. For **Would you like to set up a payment plan** click No.
6. If you also **would like to pay a membership fee** click Yes, then:
    - Choose your M**embership Plan**
    - Enter the **Start Date**
7. Select how you would like to pay:
    - **Use an existing credit card** or
    - **Enter a new credit card**
8. If you want the receipt sent by email enter your **Email Address**.

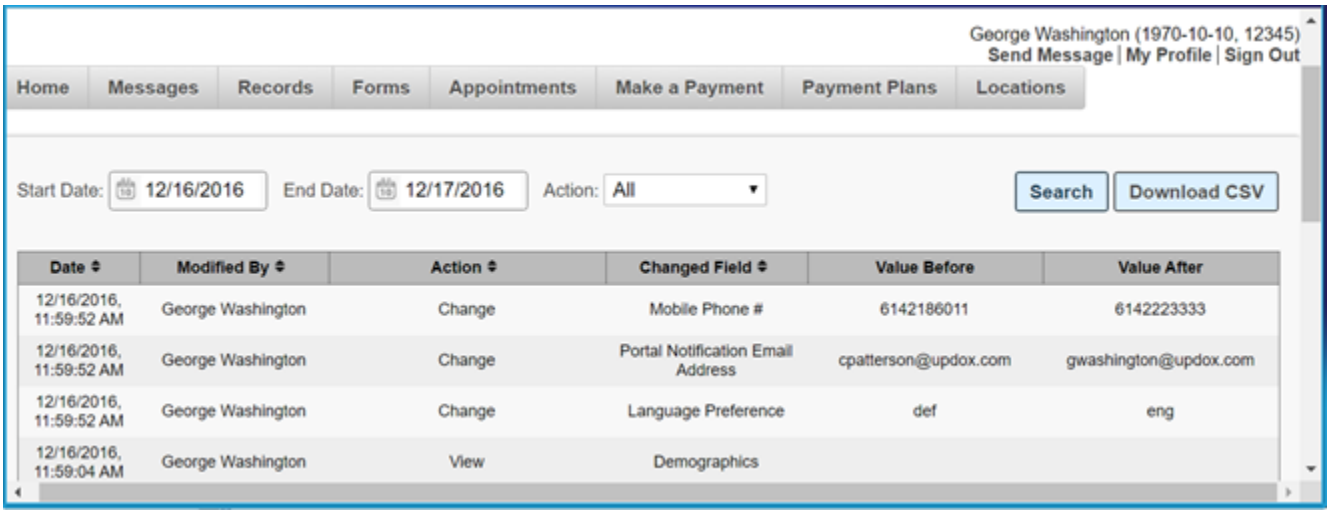
9. Click **Continue Payment**.
10. The total charge to your card displays. If you want to make this payment click Yes.
11. If you want to print a copy of the receipt click **Print.**
12. If you have more payments to make click **Make Another Payment.**

A message is automatically sent to the practice about the payment.

Patient History Audit Log

Location: Patient Profile

The Patient History Audit Log shows a history of actions (e.g. changes) that occurred in the patient's Patient Portal account.



To view the history:

1. Sign into the Patient Portal
2. Go to **My Profile** > **Patient Profile** > **View Patient History Audit Log**.
3. Select the filters to use:
    - **From** - (required) - enter the start date (information is available starting around 3rd quarter 2016)
    - **To** - (required) - enter the ending date
    - **Action** - (optional) - limits the report to a selected action (e.g. changes) ; the default is all actions
3. Click **Search**.
4. To sort the report, click the arrows by one of the column headings. Click again to reverse the sequence.
5. To download the report to a .csv file (which is easily viewed in a spreadsheet application, e.g. Excel), click **Download CSV**.

Actions

The actions logged include:

- Add
- Cancel
- Change
- Delete
- Download
- Login
- Logout
- Print

- Transmit
- View
- Update

Log Info

The information shown includes:

- Date/time
- Modified by
- Action
- Changed Field
- Value Before (if the action is change or delete)
- Value After (if the action is change)
- Transmit Address (when transmitting the health record)

Refer & Share Secure Messaging

The Refer & Share feature lets you invite other practices to use the Updox Secure Messaging application. This application is **free** to the other practice and there is no additional cost to you. Secure messaging is just like the name implies; it
enables you to quickly and easily exchange healthcare information that is wrapped in a layer of security (encryption).

Secure messaging is similar but different from Direct messaging:

- Both are secure ways to transmit messages.
- Secure messaging is completely within the Updox network (meaning both the sender and receiver have Updox).
- Direct messaging has an added benefit that enables you to also exchange with practices not using Updox and, as such, requires additional security precautions like identity verification of both the sender and receiver. Additionally, digital certificates are exchanged behind the scenes on your behalf.

- Secure messaging doesn't require identity verification since you already know the practice you're inviting to participate.
- The Meaningful Use Incentive Program does require that you use Direct messaging when transmitting a Transition in Care summary (CCD*) to another practice for patient referrals or transitions in order to count in the MU Measure.

Invitation Workflow

1. Use the Refer & Share feature to invite a practice. You'll need either their email address or fax number.
2. The practice receives an email or fax inviting them to use Updox Secure Messaging.
3. To accept, the practice either clicks on the link in the email or if the invitation was by fax, they would enter the specified URL in their web browser.
4. The practice will complete a short registration process to set up their account.
5. The registering user receives an email with their user ID and temporary password.
6. The user then signs into Updox and changes their password.
7. They are now ready to send and receive messages.

*CCD - Continuity of Care Document

Send a Refer & Share Invitation

Location: Home Menu

To send a Refer & Share invitation:

1. Go to **Home** menu > **Refer & Share**.
2. Click **SEND INVITATION**.
3. Enter the **Name** of the practice to invite.
4. Enter an **email address** or **fax number** at that practice.
5. Click **SEND INVITATION**.

An invitation email or fax is then sent to the practice.

Accept a Refer & Share Invitation

Location: Email or Fax Machine

To accept a Refer & Share invitation:

1. In an email invitation, click the provided link.
2. In a fax invitation, enter the URL in your web browser.
3. A web page then displays with multiple options:
    - To open a new Updox account choose one of the following options:
        - **Sign up with an NPI** (this pre-fills some of the information for you)
        - **Sign up with an NPI**
        - **Start a full-account trial**
    - If an Updox account already exists, click **Log on to Updox**, then enter the user ID and password.
    - For more information about Updox, click **Visit Updox.com**.
4. When opening a new account, complete the following information on the registration page that displays:
    - **First Name**
    - **Last Name**
    - **User ID (email)**
    - **Invitation Code** (from the email or fax)
    - **Organization Name**
    - **Address**
    - **City**
    - **State**
    - **Zip**
    - **Fax #** (optional)
    - **Phone**
    - **Our EHR** (enter n/a if you don't use an EHR)
5. Click **Finish**.
6. An email is sent to the address entered in the User ID field with the log in instructions.
7. Log into Updox using the User ID and temporary password from the email.
8. Change your temporary password by going to Admin > **Users**.

Add Practice Members to Your Address Book

Location: Address Book

To add users to your Address Book from the practice that invited you:

1. Go to the **Address Book**.
2. Search for the name of that practice.
3. Click on the **Practice Members** tab.
4. Click the **ADD TO THE ADDRESS BOOK** button by each user to add.
5. When finished, click the **X** in the upper right corner to close the Address Book.

Reminders

Reminders is an add-on feature that helps eliminate no shows at your practice and prevent lost income. The application lets you send appointment reminders to patients by text message, email, or telephone. Patients have the convenience of confirming or canceling their appointments directly from the reminder. Your practice will be notified when patients confirm or cancel their appointments.

Features & Benefits

- Fully customizable. You can choose exactly how and when your patients will be notified of upcoming appointments – via text, phone and/or email
- Patients can select their preferred reminder method (text, email or phone) and can confirm or cancel their appointment
- Customizable email reminder templates
- Reminder dashboard provides easy, at-a-glance management of all your appointments
- Build relationships with patients to engage them in their care and improve outcomes
- Receive notifications if patients are missing contact information that prevents a reminder from being sent
- Quiet time - no telephone or text reminders are sent between the hours of 8pm and 8am (instead, the reminders scheduled between those times are sent just before the quiet time begins

If your practice sees 250 patients a week, probably 20 patients miss appointments (8% average no-show rate). At a value of $150 per appointment, that's costing your practice at least $156,000 each year! Can you afford to lose that money? Factor in labor costs for scheduling, rescheduling and paperwork and that's even more money out of your pocket!

Reminders Configuration

The articles in this section describe the setup steps for using reminders.

Reminders Setup Checklist

Location: Admin

You need Admin privileges to complete this function.

Setup steps for Reminders:

- ? Purchase the Reminders feature.
- ? Collect patient contact information: email address, cell phone number, and/or home telephone number and enter in your EHR.
- ? In Practice Information, enter the URLs for your website, Facebook, and/or Twitter accounts (optional) and enter the telephone number that patients should call if they have questions about their appointments.
- ? In Reminder Settings on the Scripts tab, add your own scripts (optional).
- ? In Reminder Settings on the Rules tab, define the reminder rules.
- ? In Scheduling Settings on the Rules tab, define if patients can confirm appointments (remaining settings only applicable if using the Updox Scheduling application).

? In Scheduling Settings on the Calendars tab, change provider's name if needed (remaining settings only applicable if using the Updox Scheduling application).
? In Scheduling Settings on the Appt. Types tab, specify the reminder scripts to use for each appointment type (optional, use if you want to specify scripts other than the Updox default scripts)
? In Scheduling Settings on the Locations tab, define your appointment locations (optional) (availability dependent on your EHR's integration with Updox).
? You can optionally use your practice telephone number as the caller ID for telephone and text message reminders. If interested, email us at support@updox.com and we'll get that turned on for you.
? You can optionally change a patient's preferred voice reminder language to Spanish in the **Address Book** or Patient Portal (the default is English).
? For appointment systems not integrated with Updox, use the File Upload tool to send files containing the patient and appointment information to Updox.

Define/Change Reminder Rules

Location: Admin

You need Admin privileges to complete this function.

Up to 3 reminders can be sent for each appointment. Email and phone reminders must use scripts to format the message. Go to the **Scripts** tab to select/define your own scripts.

To define/change your reminder rules:

1. Click **MENU** > **Admin** > **Reminders.**
2. **Practice Timezone** - select your timezone.
3. **Method and When** - decide how many reminders to send for each appointment (1, 2 , or 3). For each reminder instance:
    - Select the reminder method (Email, Telephone-home, Telephone-cell, or Text Message).
    - Select how much time before the appointment to send the reminder (2 hrs, 4 hrs, 24 hrs, 48 hrs, 1 week).
    - When ready to turn on the reminder, check the check box.
    - To turn off a reminder, uncheck the check box.
4. **Send reminders after confirmation is received** - check to continue sending reminders after the patient has confirmed.
5. **Blackout Times** - Define blackout times when reminders should not be sent. Any reminders scheduled during these times will be sent prior to the blackout time.
    - **Blackout weekends** - check to not sent reminders on the weekend.
    - **Nightly blackout start time** - select the start time for nighttime blackout (default is 7pm).
    - **Morning blackout end time** - select the end time for the nighttime blackout (default is 7am).
6. **Appointment Contact Telephone No** - enter the number that patients should call if they have questions about their appointment.
7. **Allow patients to cancel an appointment from the reminder** - by default patients can cancel an appointment from the reminder; uncheck to not allow patients to cancel in this manner.
8. **Allow patients to call the office from the reminder** - by default patients receiving voice reminders have the option to Press 3 to call the office; uncheck to remove that feature from the reminder.
9. **Filter out multiple reminders for patients within specified time frame** - check to send only one reminder when there are multiple appointments within a specified time period (e.g. same day) instead of sending a reminder for each, then select the time frame.
10. **Human Voice** - for human voice phone reminders select the language/gender.
11. Click **Save**.

If a patient has specified a reminder communication preference (e.g. text) but the contact information is missing (e.g. cell phone) the reminder will be sent by an alternate method. If you prefer to not send reminders when the patient's preference can't be honored, contact us at support@updox.com to have your configuration changed.

Define Reminder Scripts

This section contains information on managing the reminder scripts that you'll specify in the **Scheduling Appointment Types**. There is a library of default script available for each of the reminder methods (email, human voice, computer voice, and text messaging). You can choose to use a default script or very easily create your own. In addition, you can choose to have your voice script further customized with a human voice (there is a setup fee for this customization).

Voice reminders can be delivered per the patient's preferred language (English or Spanish). This preference can be specified in the **Address Book** or in the Patient Portal profile.

Default Reminder Scripts

There is a library of default script available for each of the reminder methods (email, human voice, computer voice, and text messaging). These scripts cannot be altered but you can save them to a new name and make changes to give you a head start in designing your own reminder scripts.

Rules Scripts

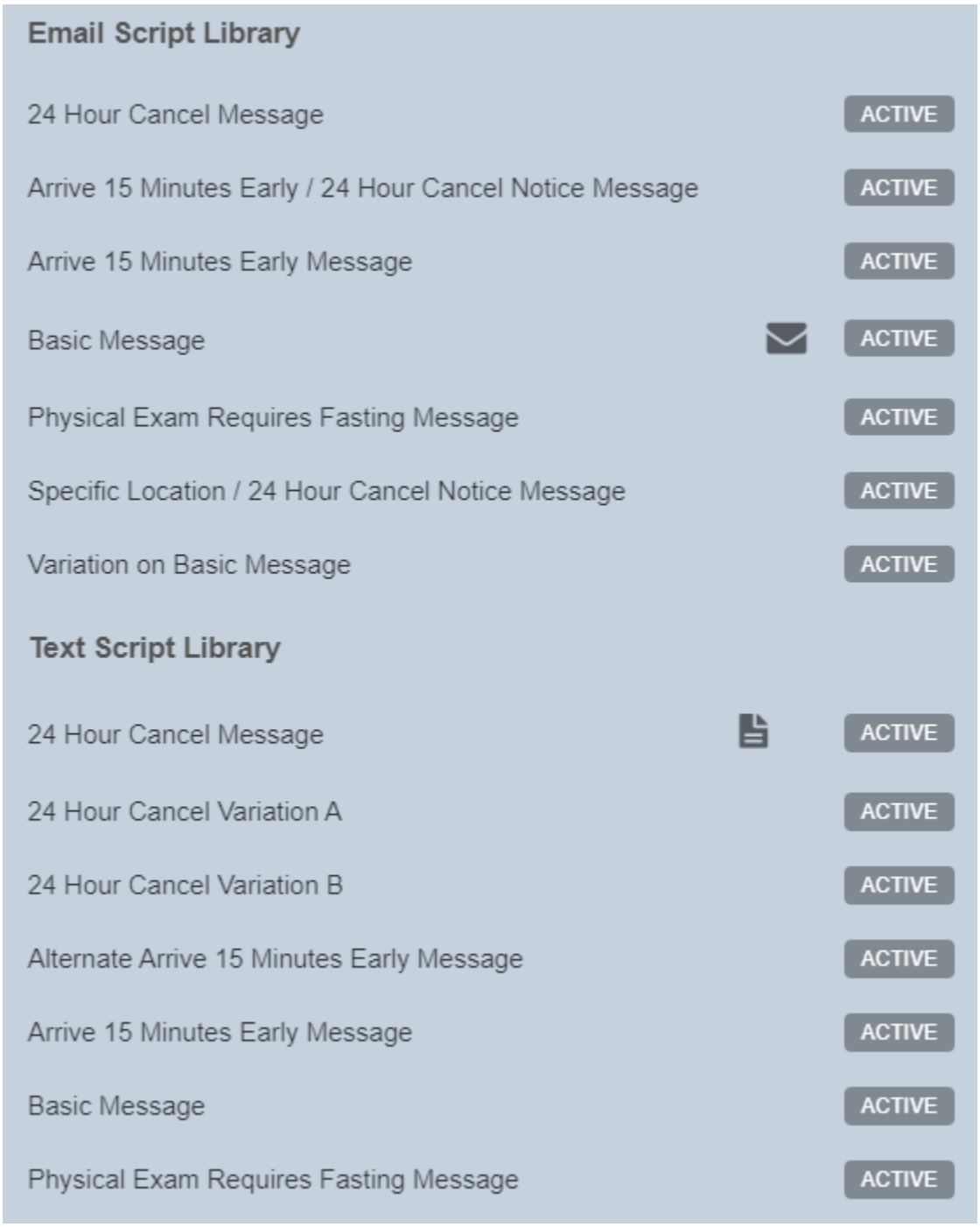
Show/Hide Inactive

Human Voice Script Library

24 Hour Cancel Message	ACTIVE
Arrive 15 Minutes Early / 24 Hour Cancel Notice Message	ACTIVE
Arrive 15 Minutes Early Message	ACTIVE
Call Office with Questions Message	ACTIVE
Physical Exam Requires Fasting Message	ACTIVE
Specific Location / 24 Hour Cancel Notice Message	ACTIVE
Variation on 24 Hour Cancel Message	ACTIVE

Computer Voice Script Library

24 Hour Cancel Message	ACTIVE
Arrive 15 Minutes Early / 24 Hour Cancel Notice Message	ACTIVE
Arrive 15 Minutes Early Message	ACTIVE
Call Office with Questions Message	ACTIVE
Physical Exam Requires Fasting Message	ACTIVE
Specific Location / 24 Hour Cancel Notice Message	ACTIVE
Variation on 24 Hour Cancel Message	ACTIVE



Define eMail Reminder Scripts

Location: Admin

This function lets you define your own library of email reminder scripts.

	You need Admin privileges to complete this function.

To add your own Email script(s) for reminders:

1. Click **MENU** > **Admin** > **Reminders** > **Scripts**.
2. Click **New**.
3. Click **ADD EMAIL SCRIPT**.
4. Enter the **Script Name**.
5. If this is to be your default email script, select the **Default** checkbox.
6. Click the **Add Image** area to select an image to display in the email reminder. (optional)

7. Enter **Additional Header Text** to display below the image and above the practice name and address (e.g. doctor names). Use the Text Editing Tools to format the text. (optional)
8. The **Subject** line in the email reminder is always: Upcoming Appointment Reminder.
9. In the **Message** box, compose the reminder message.
    - Use variables to insert patient specific or practice information.
    - Use the Text Editing Tools to format the text.
    - The following buttons are automatically added to the template: **Save to Calendar**, **Confirm**, **Cancel**.
    - The **Facebook** button is automatically added if the URL is specified in Practice Information.
    - The **Twitter** button is automatically added if the URL is specified in Practice Information.
    - The practice name, address, and website URL are automatically added if specified in Practice Information.
10. To see a preview of your reminder, click **PREVIEW EMAIL**.
11. Click **Save**.
12. To use your own reminders scripts, go to **Admin > Scheduling > Appt Types** to change the script to use for each of your appointment types, as needed.

Inactivate Script

To inactivate a reminder script:

1. Click **MENU** > **Admin** > **Reminders**
2. If the script is in any of your Scheduling Appt Type settings, replace it with a different script.
3. Next, click the **Scripts** tab.
4. Select the script to inactivate.
5. Uncheck **Active**.
6. Click **Save**.

Appointment Script Variables

- **[fullname]** - The patient's first and last name
- **[firstname]** - The patient's first name
- **[lastname]** - The patient's last name
- **[date]** - The date of the appointment
- **[time]** - The time of the appointment
- **[type]** - The type of the appointment (i.e. description)
- **[location]** - The location name of the appointment (only available if your account is configured for locations)
- **[address]** - The address of the location or practice (only available if your account is configured for locations)
- **[with]** - The calendar the appointment appears on
- **[practicename]** - The name of the practice
- **[practicephone]** - The practice telephone number

Required Variables

- [fullname] or [firstname] or [lastname]
- [date]

Text Editing Tools	
B	Bold the selected text.
I	Italicize the selected text.
S	Strike through the selected text.
U	Underline the selected text.
↺	Undo.
↻	Redo.

Define Computer Voice Reminder Scripts

Location: Admin

This function lets you define your own library of computer voice reminder scripts.

You need Admin privileges to complete this function.

To add your own Computer Voice template(s) for reminders:

1. Click **MENU** > **Admin** > **Reminders** > **Scripts**.
2. Click **New**.
3. Click **ADD COMPUTER VOICE SCRIPT**.
4. Enter the **Script Name**.
5. In the **Message** box, compose the reminder message:
    - Use variables to insert patient specific or practice information.
    - The following statement is automatically added to your message: Press 1 to confirm the appointment or 2 to cancel.
    - For example: [fullname] has an appointment on [date] at [time] with the [practicename] office. If you have any questions, please call [practicephone].
6. Click **Save**.
7. To use your own reminders scripts, go to **Admin > Scheduling > Appt Types** to change the script to use for each of your appointment types, as needed.

Variables

- **[fullname]** - The patient's first and last name
- **[firstname]** - The patient's first name
- **[lastname]** - The patient's last name

- **[date]** - The date of the appointment
- **[time]** - The time of the appointment
- **[type]** - The type of the appointment (i.e. description) Note: Take caution with using this variable if you have any appointment types that are privacy sensitive (e.g. HIV follow-up).
- **[location]** - The location name of the appointment (only available if your account is configured for locations)
- **[address]** - The address of the location or practice (only available if your account is configured for locations)
- **[with]** - The calendar the appointment appears on
- **[practicename]** - The name of the practice
- **[practicephone]** - The practice telephone number

Required Variables
- [firstname]
- [date]

Define Human Voice Reminder Scripts

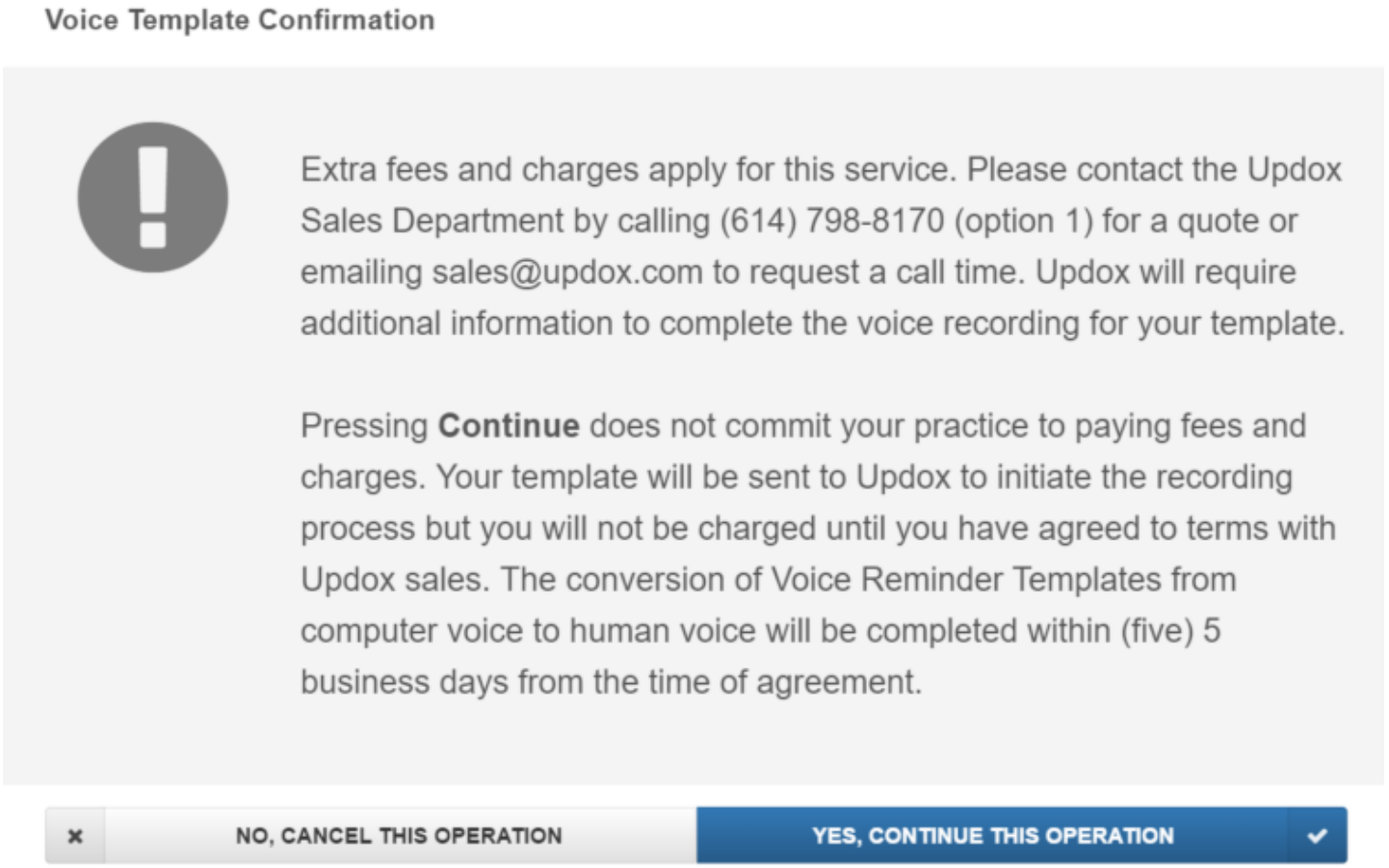
Location: Admin

This function lets you define your own library of human voice reminder scripts. There is an additional charge for this service. See details below.

You need Admin privileges to complete this function.

To add your own Voice template(s) for reminders:

1. Click **MENU** > **Admin** > **Reminders** > **Scripts**.
2. Click **New**.
3. Click **ADD HUMAN VOICE SCRIPT**.
4. Enter the **Script Name**.
5. In the **Message** box, compose the reminder message:
    - Use variables to insert patient specific or practice information.
    - The following statement is automatically added to your message: Press 1 to confirm the appointment or 2 to cancel.
    - For example: [fullname] has an appointment on [date] at [time] with the [practicename] office. If you have any questions, please call [practicephone].
6. Click Save.
7. The following message pops up to remind you that extra charges apply to customize human voice scripts. Click No to cancel. Click Yes to continue.
8. Once your customize script is completed, go to **Admin > Scheduling > Appt Types** to change the script to use for each of your appointment types, as needed.



7. If this is to be your default voice script for a home phone, select the checkbox for **Default home phone script**.
8. If this is to be your default voice script for a cell phone, select the checkbox for **Default cell phone script**.
9. To hear a preview of your reminder, enter a telephone number where you can be reached without going through a receptionist or automated call routing system (e.g. cell phone) then click **PREVIEW**.
10. Click **Save**.

Inactivate Script

To inactivate a reminder script:

1. Click **MENU** > **Admin** > **Reminders**
2. If the template is in any of your Reminder rules, replace it with a different script.
3. Next, click the **Scripts** tab.
4. Select the template to inactivate.
5. Uncheck **Active**.
6. Click **Save**.

Variables

- **[fullname]** - The patient's first and last name
- **[firstname]** - The patient's first name
- **[lastname]** - The patient's last name
- **[date]** - The date of the appointment
- **[time]** - The time of the appointment
- **[type]** - The type of the appointment (i.e. description) Note: Take caution with using this variable if

you have any appointment types that are privacy sensitive (e.g. HIV follow-up).

- **[location]** - The location name of the appointment (only available if your account is configured for locations)
- **[address]** - The address of the location or practice (only available if your account is configured for locations)
- **[with]** - The calendar the appointment appears on
- **[practicename]** - The name of the practice
- **[practicephone]** - The practice telephone number

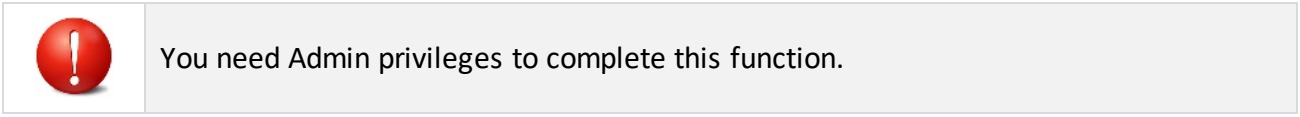
Required Variables

- [firstname]
- [date]

Define Text Messaging Reminder Scripts

Location: Admin

This function lets you define your own library of text reminder scripts.



To add your own text message scripts for reminders:

1. Click **MENU** > **Admin** > **Reminders** > **Scripts**.
2. Click **New**.
3. Click **ADD TEXT SCRIPT**.
4. Enter the **Script Name**.
5. If this is to be your default text messaging script, select the **Default** checkbox.
6. In the **Message** box, compose the reminder message:
    - Use variables to insert patient specific or practice information.
    - For example: [firstname] has an appointment on [date] at [time] with the [practicename] office. Any questions, call [practicephone].
7. To see a preview of your reminder, click **PREVIEW TEXT**.
8. Click **Save**.
9. To use your own reminders scripts, go to **Admin > Scheduling > Appt Types** to change the script to use for each of your appointment types, as needed.

Inactivate Script

To inactivate a reminder script:

1. Click **MENU** > **Admin** > **Reminders**
2. If the script is in any of your Scheduling Appt Type settings, replace it with a different script.
3. Next, click the **Scripts** tab.
4. Select the script to inactivate.
5. Uncheck **Active**.
6. Click **Save**.

Appointment Script Variables

- **[firstname]** - The patient's first name
- **[date]** - The date of the appointment
- **[time]** - The time of the appointment
- **[location]** - The location name of the appointment (only available if your account is configured for locations)
- **[with]** - The calendar the appointment appears on
- **[practicename]** - The name of the practice
- **[practicephone]** - The practice telephone number

Required Variables
- [firstname]
- [date]

Reminders Dashboard

The Reminders Dashboard lets you monitor appointment confirmations and cancels as well as providing you analytics about the reminders sent. To access the dashboard go to the **Menu** > **Reminders Dashboard**.

Reminders Dashboard - Appointments/Reminders

The Appointments/Reminders view in the dashboard lets you:
- View patient appointments
- View the reminders sent for each appointment
- View the patient's response to the reminder
- Manually confirm or cancel the appointment if the patient calls instead of responding to a reminder

View the Appointments

1. Click **MENU** > **Reminders Dashboard.**
2. Select the provider's calendar to display or accept the default of all calendars.
3. Select the time period to display: Daily or Date Range.
4. Enter the date(s).
5. Leave **Appointments/Reminders** selected as the view.
6. Click **Search**.
7. The following appointment information displays:
    - Appointment date/time
    - Provider's name
    - Patient's name
    - Reminder response

View the Reminders Sent for an Appointment

1. Click the + sign before the appointment to expand the reminders section.
2. The following reminder information displays:
    - Date/time reminder was sent
    - Reminder method (e.g. telephone)
    - Reminder response

- Reminder response date/time

Manually Confirm or Cancel an Appointment

If a patient calls your office instead of replying to a reminder, these buttons let you manually confirm or cancel the appointment.

1. To manually confirm an appointment, click the Confirm button.
2. To manually cancel an appointment, click the Cancel button.

Print

- To print the reminders, click the **PRINT** button.

Refresh

- To see changes that have occurred since you entered the Reminders Dashboard, click the **REFRESH** button.

Reminders Dashboard - Reminder Summary

The Reminder Summary view in the dashboard provides analytic charts about the reminders sent:

- Overall Reminder Methods Summary
  - Email
  - Telephone
  - Text Message
- Overall Reminders Summary
  - Reminders with responses
  - Reminders without responses
  - Total reminders sent
- Reminders by Method (# sent, # responses)
  - Email
  - Telephone
  - Text Message
- Reminders by Response
  - Confirmed
  - Canceled
  - Called the Office

View the Reminder Summary

1. Click **MENU** > **Reminders Dashboard.**
2. Select the provider's calendar to display or accept the default of all calendars.
3. Select the time period to display: Daily or Date Range.
4. Enter the date(s).
5. Select the **Reminder Summary** view.
6. Click **Search**.

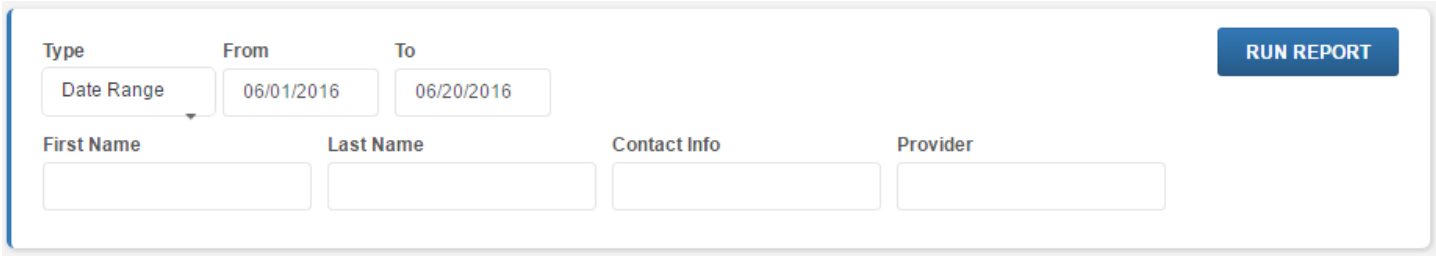
Reminders Reporting

The Reminders Reporting function lets you drill down into the details about the reminders that have been sent.

To run a report:

1. Click **MENU** > **Reminders Reporting.**

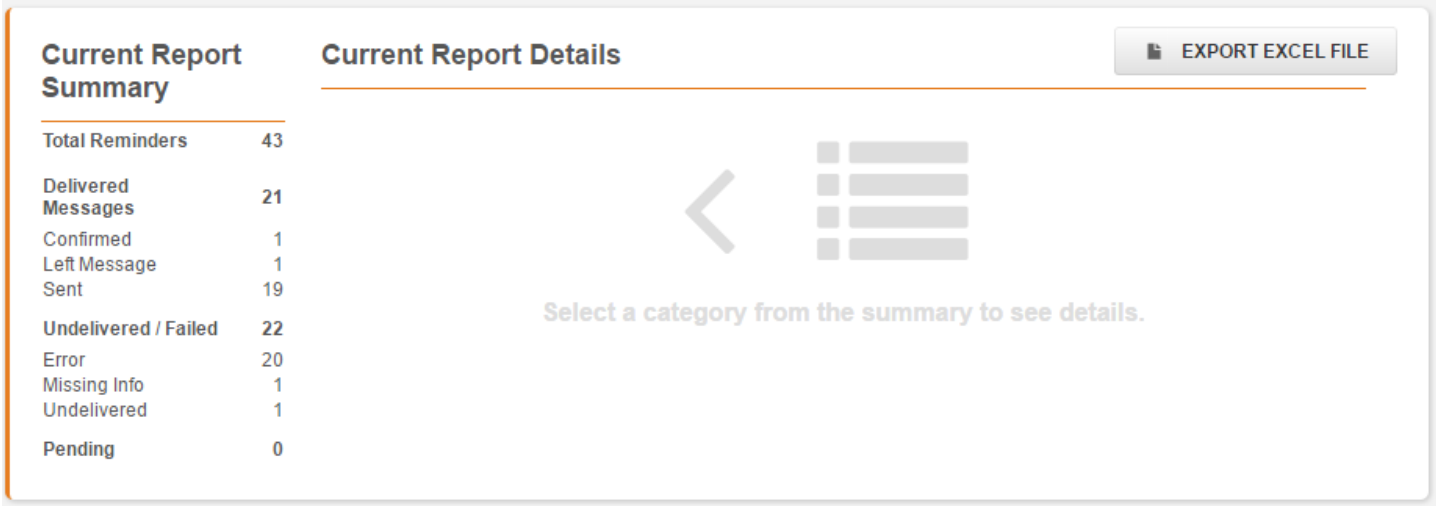
2. Select the date(s).
3. Enter one or more optional filters as needed:
    - **First Name** (patient first name
    - **Last Name** (patient last name)
    - **Contact Info** (e.g. phone number, email address)
    - **Provider** (provider's first, last, or full name)
4. Click **Run Report**.



Current Report Summary

This section displays reminder counts. Click on any of the categories to drill down into the details.

- Total Reminders
- Delivered Messages
    - Confirmed
    - Left Message
    - Sent
- Undelivered/Failed
    - Error
    - Missing Info
    - Undelivered
- Pending



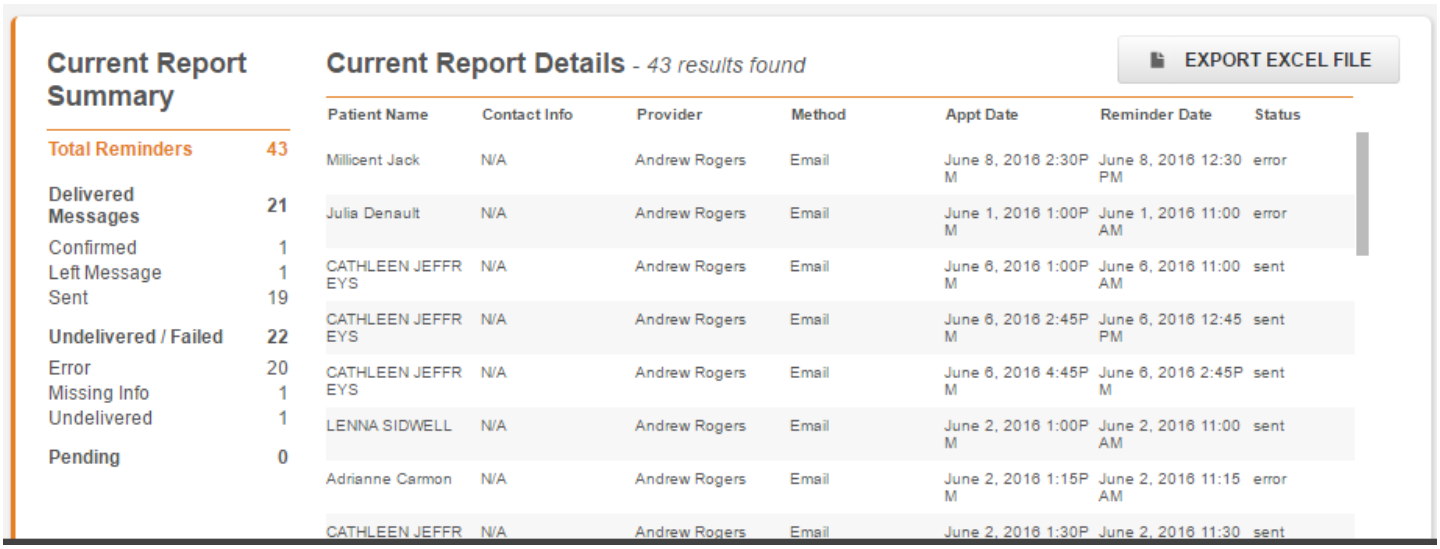
Current Report Details

This section displays the following details for a selected category.

- Patient Name
- Contact Info
- Provider
- Method
- Appt Date
- Reminder Date
- Status

To export the information, click the EXPORT EXCEL FILE button. This creates a file that you can open in a

spreadsheet program like Microsoft Excel.



Current Report Summary

Total Reminders	43
Delivered Messages	21
Confirmed	1
Left Message	1
Sent	19
Undelivered / Failed	22
Error	20
Missing Info	1
Undelivered	1
Pending	0

Current Report Details - *43 results found*

EXPORT EXCEL FILE

Patient Name	Contact Info	Provider	Method	Appt Date	Reminder Date	Status
Millicent Jack	N/A	Andrew Rogers	Email	June 8, 2016 2:30PM	June 8, 2016 12:30 PM	error
Julia Denault	N/A	Andrew Rogers	Email	June 1, 2016 1:00PM	June 1, 2016 11:00 AM	error
CATHLEEN JEFFREYS	N/A	Andrew Rogers	Email	June 6, 2016 1:00PM	June 6, 2016 11:00 AM	sent
CATHLEEN JEFFREYS	N/A	Andrew Rogers	Email	June 6, 2016 2:45PM	June 6, 2016 12:45 PM	sent
CATHLEEN JEFFREYS	N/A	Andrew Rogers	Email	June 6, 2016 4:45PM	June 6, 2016 2:45PM	sent
LENNA SIDWELL	N/A	Andrew Rogers	Email	June 2, 2016 1:00PM	June 2, 2016 11:00 AM	sent
Adrianne Carmon	N/A	Andrew Rogers	Email	June 2, 2016 1:15PM	June 2, 2016 11:15 AM	error
CATHLEEN JEFFR	N/A	Andrew Rogers	Email	June 2, 2016 1:30P	June 2, 2016 11:30	sent

Example of an exported report:

	A	B	C	D	E	F	G
1	Patient Name	Contact Info	Provider	Method	Appt Date	Reminder Date	Status
2	Julia Denault		Andrew Rogers	Email	6/1/2016 13:00	6/1/2016 11:00	error
3	CATHLEEN JEFFREYS		Andrew Rogers	Email	6/1/2016 13:30	6/1/2016 11:30	sent
4	CATHLEEN JEFFREYS		Andrew Rogers	Email	6/6/2016 13:00	6/6/2016 11:00	sent
5	CATHLEEN JEFFREYS		Andrew Rogers	Email	6/6/2016 14:45	6/6/2016 12:45	sent
6	CATHLEEN JEFFREYS		Andrew Rogers	Email	6/6/2016 16:45	6/6/2016 14:45	sent
7	LENNA SIDWELL		Andrew Rogers	Email	6/2/2016 13:00	6/2/2016 11:00	sent

Secure Text

Secure Text is a HIPAA compliant, 2-way messaging product that allows practices to communicate with patients in real time.

Secure Text Configuration

This section provides information on configuring your secure text solution.

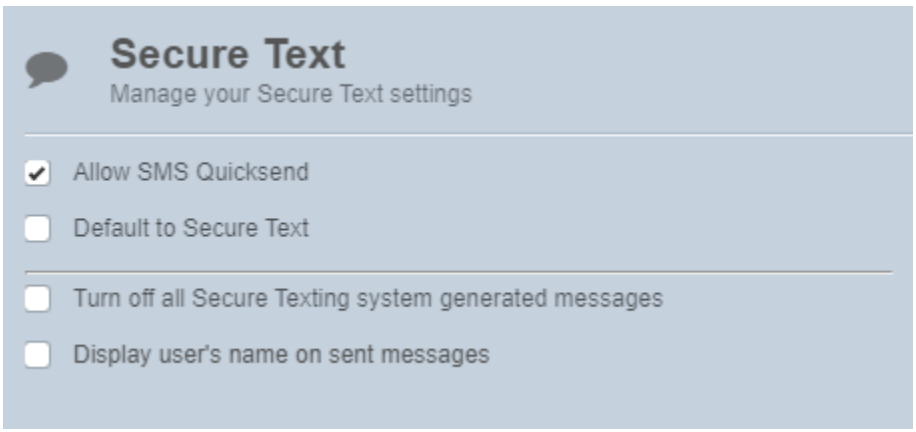
Define Secure Text Settings

Location: Admin

	You need Admin privileges to complete this function.

To define your Secure Text settings:

1. Click **MENU > Admin > Secure Text Settings.**
2. Click on the checkboxes for your desired settings.
    - **Allow SMS Quicksend** - This option is checked by default, which means you have the option to send non-secure SMS text messages as well as secure text messages. If you un-check this option it will disable the ability to send a non-secure SMS text message.
    - **Default to Secure Text** - When checked, this option will default the Text Message screen to the format required for a secure text message. You can still send an SMS text message by un-checking the Secure Message option located on the bottom of the Text Message screen.
    - **Turn off Secure Texting system generated messages** - If patients have any issues when trying to view a secure text message, a message will appear in the practice inbox. Checking this option will stop all those messages. We suggest leaving the Turn off Secure Texting system generated messages checkbox unchecked. Secure text messages are usually important, so you would want to know when the patient is having an issue viewing the message.
    - **Display user's name on text messages** - Selecting this option will display the staff person's name who sent the message as part of the text message.
3. Click **Save.**



Using Secure Text

This section provides information on using secure text.

Send a Secure Text

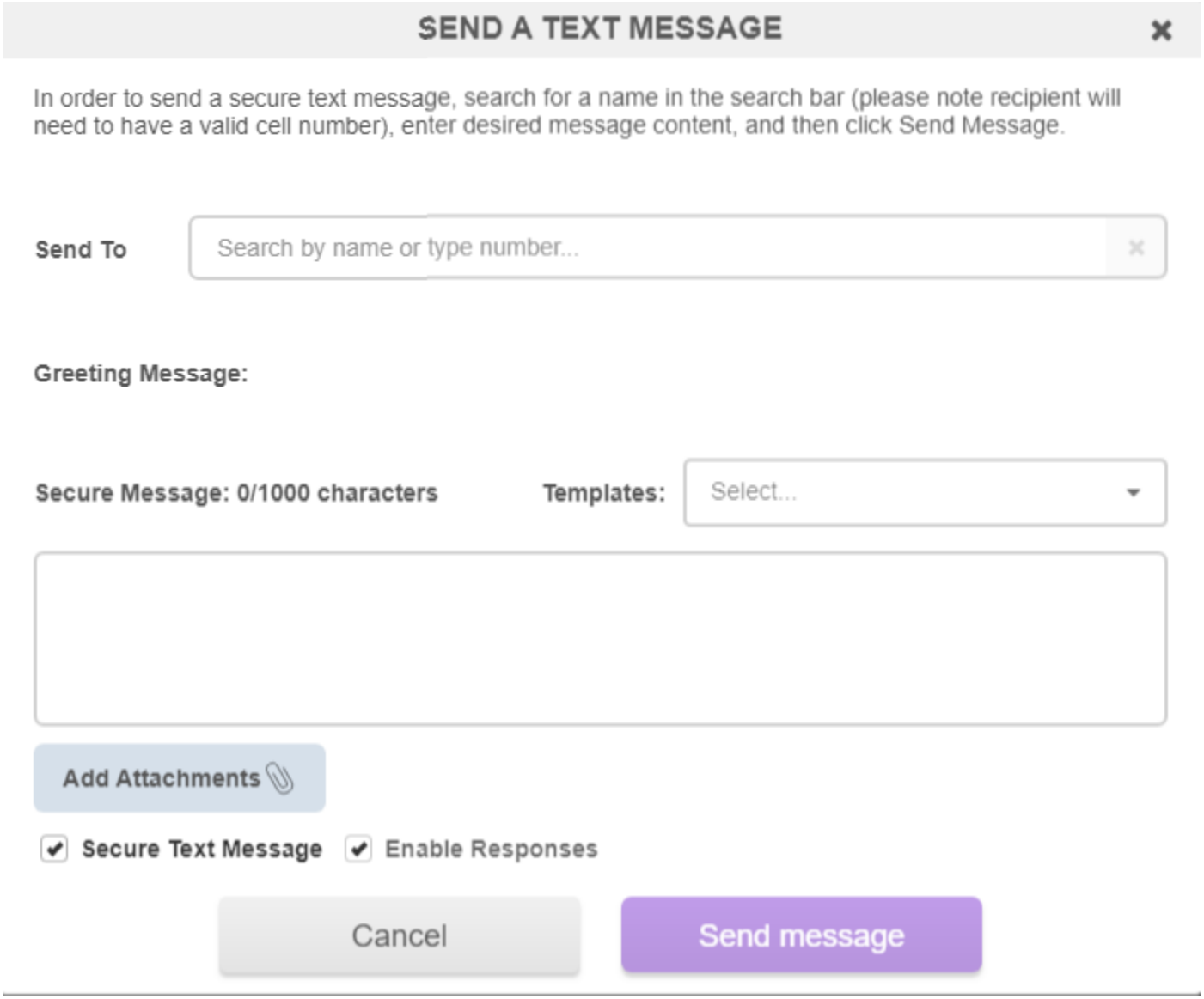
Location: Workspace

In order to send a Secure Text the patient must have a cell phone number and date of birth saved in the Updox Address Book. The date of birth will be used to authenticate the patient's identity before allowing them to view the message.

Send a Secure Text:

1. From the Inbox select the **Text Message** button located at the top of the screen.
2. Select the **Secure Messag**e option.
3. The **Enable Patient Responses** checkbox is checked by default. If you do not want the patient to respond to the message, un-check Enable Patient Responses. Responses from the patient will come into the practice inbox.
4. Enter the patient's cell phone number or search by name or partial name.
5. Enter your message or select a template by clicking on the **Template** drop down.
6. Add files or links as needed.
7. Click **Send** Message.
8. When the patient replies to a text, a new item will appear in the practice Inbox and their response will be added to the original message thread.

Note: The Greeting Message is a separate text that is sent to the patient and includes a link to authenticate their identity before they can see your message. You cannot change the greeting Message.


SEND A TEXT MESSAGE
In order to send a secure text message, search for a name in the search bar (please note recipient will need to have a valid cell number), enter desired message content, and then click Send Message.
Send To
Search by name or type number...
Greeting Message:
Secure Message: 0/1000 characters
Templates:
Select...
Add Attachments
Secure Text Message
Enable Responses
Cancel
Send message

Security

This section reviews how the information is kept secure.

How is Information Kept Secure?

Location: n/a

Keeping patient healthcare information confidential has always been an important aspect in your business. Once electronic health records emerged it was evident that a new type of security was needed to keep information private and secure.

Rest assured that the information in this application is well protected using encryption, firewalls, intrusion monitoring, and is behind locked doors in a secure location with 24 hr surveillance.

When information is transmitted using Direct messaging it is not only protected by encryption but also through the exchange of security certificates and identity proofing of the sender and receiver.

File Utilities

This section contains information on file utilities.

Billing and Reporting

This section provides information on usage, analytics, and billing.

Usage Information

Location: Tools

The Usage Information feature lets you quickly see details about the practice and the application utilization.

- Practice fax #
- Practice email
- Practice Direct address
- Your email
- Your Direct address
- Date your billing cycle ends
- Number of item in your monthly plan and the number used so far this month:
    - EHR imports
    - Email
    - Fax pages
    - Portal messages
    - Saves
    - Secure messages
    - User accounts

To view the usage information:

1. Click **MENU** > **Tools**.
2. Click **Usage Information**.

Analytics

Location: Tools

The Analytics feature shows the following counts:

- Total patient count
- Active patients
- Patients with email
- Patients with portals
- Patients using the portal
- Incoming faxes
- Incoming fax pages
- Outgoing faxes
- Outgoing fax pages

To view the analytics:

1. Click **MENU** > **Tools**.

2. Click **Analytics**.

To download the patient analytics:

- Click the **DOWNLOAD PATIENT SPREADSHEET** button.
- The spreadsheet contains the following information on each patient:
    - First name
    - Last name
    - Chart #
    - Home Phone #
    - Cell Phone #
    - Email address
    - Has portal account
    - Has logged into portal account

Billing Information

Location: Admin

You need Admin privileges to complete this function.

The Billing Information feature displays the following information:

- Number of items in your monthly plan and the number used so far this month:
    - EHR imports
    - Email
    - Fax pages
    - Portal messages
    - Saves
    - Secure messages
    - User accounts
- Last bill date
- Next bill date
- Plan amount

To add or remove fax bundles on this page (applicable to accounts that aren't automatically calculated):

- Add a Fax Bundle
- Remove a Fax Bundle

To view the usage information:

1. Click **MENU** > **Admin**.
2. Click **Billing**.

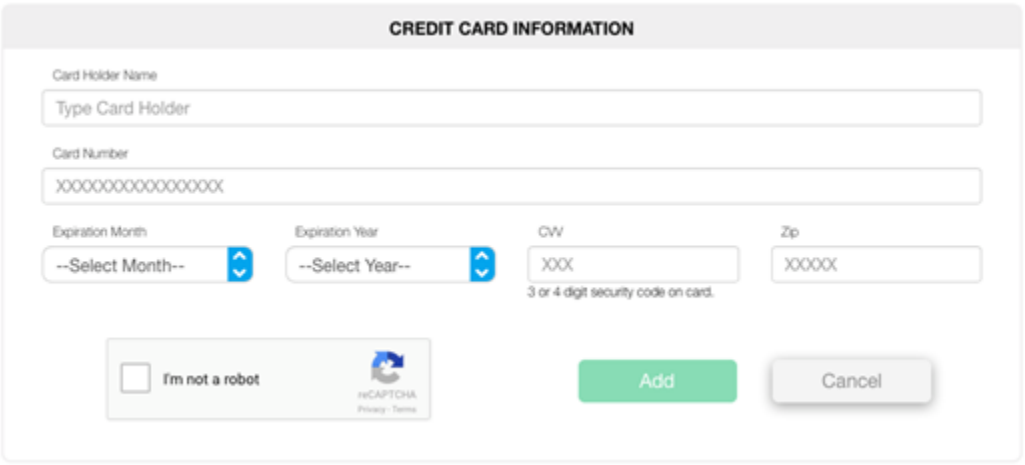
Update Credit Card Information

Location: Admin

You need Admin privileges and be the Account Holder to complete this function.

To update the credit card information:

1. Click **MENU** > **Admin**.
2. Click **Billing**.
3. Click the settings icon by **Current credit card info**.
4. Enter the credit card information.
    - **Card Holder Name**
    - **Card Number**
    - **Expiration Month**
    - **Expiration Year**
    - **CVV (3 or 4 digit security code on card)**
    - **Zip**
5. Click the **I'm not a robot** checkbox. This field is an added security measure.
6. Click **Add**.



To help ensure uninterrupted service, you will receive an email when your credit card expiration date is approaching. Be sure to update your card information before it expires. Here's an example of the email.

> Your credit is expiring soon; the expiration date we have on file is [date].
> Please update your credit card information before it expires to ensure uninterrupted service.
> Your credit card information can be updated by the account holder by clicking on Billing Information in the Admin menu. Click on the blue icon next to “Current credit card info”, update the information, and save.
> Please contact us if you have any questions about this, support@updoxqa.com or (614) 798-8170.
>
> Thanks,
> The Updox Team

The first time the credit card on file for your practice is declined the following message displays on the Login screen:

> Alert: Please alert the account holder that the credit card account information requires immediate attention. Thank you.

After the third time the credit card is declined, the account will automatically lock. You can reactivate the account by clicking the link in the notification message that displays during login and entering the revised credit card information.

Reactivate Accounts with Expired Credit Cards

Location: Admin

To use this feature you must be the Account Holder.

Oops, your credit card has expired and your staff can't access the Updox account. No worries, the account holder can reactivate the account by updating the credit card information.

Notifications

- The following notice is emailed to the account holder when the account is locked:

  Your credit card has been repeatedly declined, and we have locked your account. To unlock your account, please have the account holder sign into the Updox Web Application. Upon sign in, the account holder will be redirected to a page allowing them to enter new credit card information. We look forward to serving you again as soon as possible.

  Thanks,
  The Updox Team

- The following message displays on the screen:

  The credit card on file for your account is no longer viable, and your account has been locked. No information is lost when your account is locked. Please update your credit card information to reactivate your account.

To reactivate:

1. Log into the Updox application. A screen immediately displays to enter the credit card information.
2. Enter the revised credit card information.
3. Click **REACTIVATE ACCOUNT**.

Change Password

Location: Tools

To change your password:

1. Click **MENU** > **Tools** > **Change Password**.
2. Enter **Current Password**.
3. Enter **New Password**. It must have:
   - At least 8 characters (maximum of 30 characters)
   - At least one upper case letter
   - At least one lower case letter
   - At least one number or special character
4. Enter new password again in **Confirm Password**.
5. Click **Save.**

* Here's the list of the top 25 worst passwords. Never use these!

1) 123456
2) password
3) 12345678
4) qwerty
5) 12345
6) 123456789
7) football
8) 1234
9) 1234567
10) baseball

11) welcome
12) 1234567890
13) abc123
14) 111111
15) 1qaz2wsx
16) dragon
17) master
18) monkey
19) letmein
20) login
21) princess
22) qwertyuiop
23) solo
24) passw0rd
25) starwars

File Upload

Location: Tools

If your software information system (e.g. EHR, Scheduling, etc.) isn't integrated with Updox, the File Upload utility enables you to still use many of the Updox features by uploading the needed information into Updox.

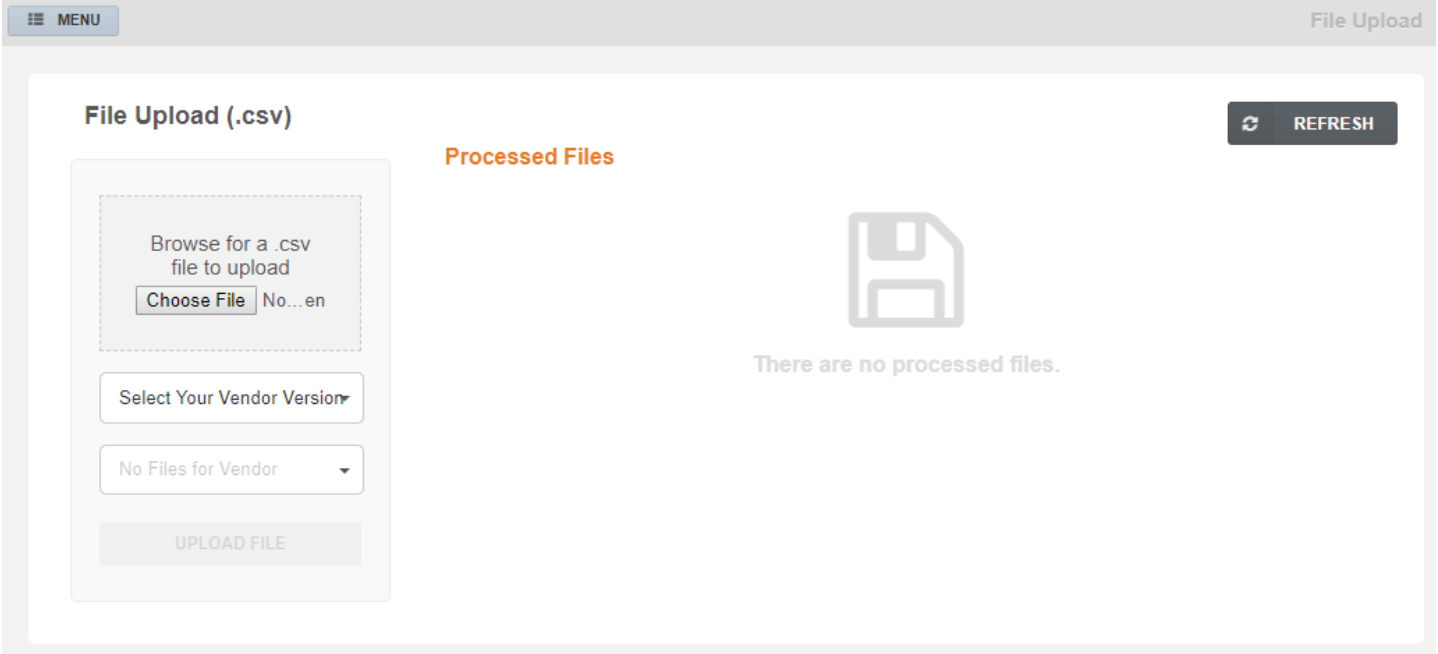
Creating a CSV File

1. Review the Updox CSV file format requirements:
    - Updox Standard Maps
        - **Patients**
        - **Contacts**
        - **Blast Patient List**
        - **Appointments**
    - Updox v2
        - **Patients**
        - **Appointments**
2. Example CSV file templates are available to guide you when using the Updox standard maps version. To download the templates:
    - In Updox, click **MENU** > **Tools** > **File Upload.**
    - **Select Your Vendor Version** - choose Updox Standard Maps.
    - **Select Your File Type** - choose the type of file:
        - Patients
        - Contacts
        - Blast Patient List
        - Appointments
        - Locations
    - Click the **DOWNLOAD TEMPLATE** button.
3. Export the information from your software information system to be uploaded into Updox.
4. Create a CSV file that conforms to the file type (e.g. patients, appointments, etc.) and the file version (e.g. standard maps, v2, custom).

Upload File to Updox

1. In Updox, click **MENU** > **Tools** > **File Upload.**
2. **Chose File** - elect the CSV file you created to upload.
3. **Select Your Vendor Version** - choose the file format version that corresponds to the CSV file you created (Updox Standard Maps, Updox v2, or a custom version designed for your software system).

4. **Select Your File Type** - choose the type of file to upload (the choices vary based on the version selected in the previous step).
    - Updox Standard Maps
        - Patients
        - Contacts
        - Blast Patient List
        - Appointments
        - Locations
    - Updox v2
        - Patients
        - Appointments
    - <Custom>
5. Click **UPLOAD FILE**.



Updox Standard Map CSV Files

This section contains the CSV file format for the Updox Standard Map files uploads.

Appointments CSV File Format

To use the Updox Standard Upload for patient appointment information, the CSV file must contain the following columns (use the exact column name and column order). It's OK if some fields are blank but the column must still be present.

- PATIENT ID
- PROVIDER FIRST NAME
- PROVIDER LAST NAME
- PROVIDER ID
- APPOINTMENT ID
- APPOINTMENT DATE
- APPOINTMENT TIME
- APPOINTMENT DURATION
- APPOINTMENT SUMMARY

- APPOINTMENT ACTIVE
- APPOINTMENT STATUS

Blast Patient List CSV File Format

To use the Updox Standard Upload for Blast patient lists, the CSV file must contain the following columns (use the exact column name and column order). It's OK if some fields are blank but the column must still be present.

- Patient ID
- First Name
- Last Name
- DOB
- Gender
- Address 1
- Address 2
- City
- State
- Zip Code
- Email
- Home Phone
- Mobile Phone
- Active

For the State column, use the two character state abbreviation.
For the Active column, enter TRUE if the record is active.

Contact CSV File Format

To use the Updox Standard Upload for address book patient contact information, the CSV file must contain the following columns (use the exact column name and column order). It's OK if some fields are blank but the column must still be present.

- Patient ID
- First Name
- Last Name
- Business Name
- Address 1
- Address 2
- City
- State
- Zip Code
- Email
- Mobile Phone
- Active
- Work Phone
- Fax Number
- EHR Account ID
- EHR Contact Location ID

- DOB

Patient CSV File Format

To use the Updox Standard Upload for patient information, the CSV file must contain the following columns (use the exact column name and column order). It's OK if some fields are blank but the column must still be present.

- Patient ID
- First Name
- Last Name
- DOB
- Gender
- Address 1
- Address 2
- City
- State
- Zip Code
- Email
- Home Phone
- Mobile Phone
- Active

Locations CSV File Format

To use the Updox Standard Upload for office location information, the CSV file must contain the following columns (use the exact column name and column order). It's OK if some fields are blank but the column must still be present.

- ID
- Name
- Code
- Active
- Address 1
- Address 2
- City
- State
- Country
- Zip
- Phone
- Fax
- Email

Updox v2 CSV Files

This section contains the CSV file format for the Updox v2 files uploads.

Appointments v2 CSV File Format

To use the Updox v2 upload for patient information, the CSV file must contain the following columns. It's OK if some fields are blank but the column must still be present.

- Practice ID
- Practice patient ID
- Practice provider ID
- Provider first name
- Provider last name
- Appointment unique ID (if available)
- Appointment date
- Appointment time

Patient v2 CSV File Format

To use the Updox v2 upload for patient information, the CSV file must contain the following columns. It's OK if some fields are blank but the column must still be present.

- Practice ID
- Practice patient ID
- First name
- Last name
- Suffix - Supported values (DC, DD, DDS, DMD, DO, II, III, IV, JR, SR, MD, OD, PHD, RN, RNC) -any case is acceptable (e.g. Sr), periods are ignored
- Date of birth
- Home telephone number (optional)
- Cell phone number (optional)
- Email address
- Active flag (Y or N)

Add or Change Your Signature

Location: Tools

Did you know you can use the Image Editor in this application to sign documents? To start using this feature you'll first need to upload your signature. Each user may have only one signature.

To add or change your signature:

1. Use a dark, relatively heavy pen or fine felt-tip marker to sign a blank sheet of paper several times.
2. Scan that page to an image or pdf file and save it to your computer. (Remember the location since you'll need it in an upcoming step.)
3. Click **MENU** > **Tools** > **My Signature**.
4. Click **CHOOSE File**.
5. Browse to your signature file from step 2.
6. Use your mouse to drag the Crop box around your signature.
7. Click **CROP AND FINISH**.

User and Patient Audit History

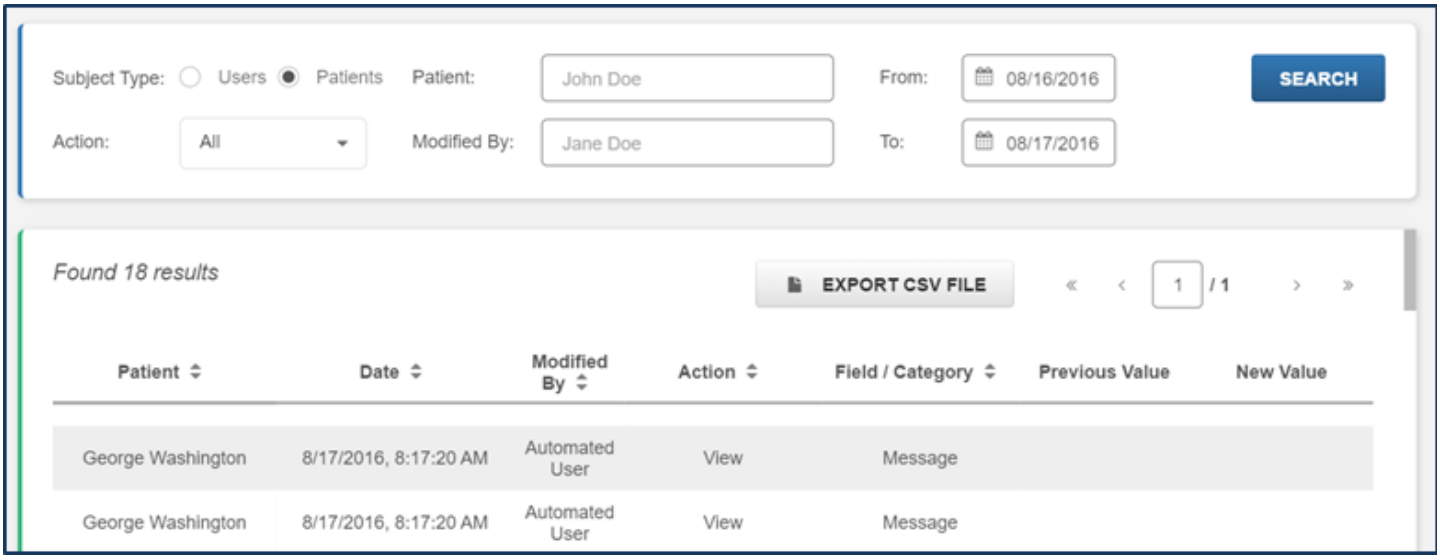
Location: Tools

The Audit Log Viewer shows a history of the actions that occurred within this application related to patients and Updox user accounts. This information is useful for:

- Investigating HIPAA privacy issues
- Monitoring if users are accessing records they should not
- Investigating who changed a user's settings or a patient's information
- Meeting MU/MACRA requirements

The information that can be linked to a patient includes:

- Address Book (patient contacts)
- Messages to/from the Updox Patient Portal
- Direct messages with a Clinical Summary (CCD) attached
- Appointments
- Patient Payments
- Analytics - patient spreadsheet download
- Note: faxes are not logged since they aren't tied directly to a patient in the Updox application



To view the history:

1. Go to **Menu** > **Tools** > **User and Patient Audit History**.
2. Select the filters you want to use.
    - **Subject Type** - (required) - select the log to view (Users or Patients)
    - **Action** - (optional) - limits the report to a selected action; the default is all actions
    - **Patient/User** - (optional) - limits the report to a selected patient (or user); the default is all
    - **Modified By** - (optional) - limits the report to the selected user who performed the actions; the default is all
    - **From** - (required) - enter the start date (information is available starting in 3rd quarter 2016),
    - **To** - (required) - enter the ending date; the default is the current date
3. Click **Search**.
4. To sort the report, click the arrows by one of the column headings. Click again to reverse the order.
5. To download the report to a .csv file (which is easily viewed in a spreadsheet application, e.g. Excel), click **Export to CSV File**.
6. To navigate through the pages, click the paging arrows or enter a specific page number.

Actions - Patient Log

The actions logged about patients include:

- Add
- Cancel
- Change
- Delete
- Download
- Print
- Save to EHR
- Transmit
- View

Actions - User Log

The actions logged about user accounts include:

- Add
- Change

Log Info

The audit log entries include:

- Patient (or User)
- Date/time
- Modified by
- Action
- Field/Category (if the action is change or delete this will be a specific field name; otherwise it will be a category of data (e.g. demographics)
- Previous Value (if the action is change or delete)
- New Value (if the action is update)

View/Print BAA

Location: Tools

This function lets you view and print the Updox Business Associate Agreement (BAA).

To view or print the BAA

1. Click **MENU** > **Tools** > **View/Print BAA.**
2. To print, click the Print button.
3. To close the window, click the Close button.

EHR Vendor Specific

This section contains articles specific to select EHR systems.

Amazing Charts

This section contains articles specific to Amazing Charts.

Amazing Charts Setup

This section walks you through the steps to configure the Amazing Charts implementation.

Amazing Charts Inbox Setup Checklist

Location: Admin

To complete the setup you must have Admin privileges.

Setup Steps for the Inbox

- ? Define Practice Information
- ? Define Practice Settings
- ? Rename Tags
  - What are Tags
- ? Add Users
- ? DirectTrust Activation
  - What is DirectTrust
- ? Add Queues (optional)
  - What are Queues
- ? Add Templates (optional)
- ? Install Updox Central
- ? Install Amazing Charts Plugin
- ? Map Amazing Charts Users

Setup Steps for the Patient Portal

- ? Define Portal Settings
- ? Add Forms (optional)

Setup Steps for the Patient Portal Scheduling *(upgrade feature)*

- ? In Scheduling under the Rules tab, define your time zone, calendar sync, patient notifications, and patient self-scheduling.
- ? In Scheduling under the Appt. Type tab, define your appointment types.
- ? In Scheduling under the Templates tab, define your own email templates (optional).
- ? In Scheduling under the Calendar tab, define a calendar for each provider.

Install Updox Central for Amazing Charts

Location: Updox Central

The Updox Central is a required application for the integration between Amazing Charts and Updox. The application enables you to:

- Automatically upload documents or faxes from a centralized folder at your practice into Updox
- Use a virtual printer to upload documents into Updox

You need to have access to the Admin menu in Updox to obtain your integration key.

Updox Central is normally installed on only one computer at your practice.

To install Updox Central:

1. Choose one computer to host Updox Central.
2. Go to that computer, open the web browser, then click here to access the install file (or copy this link into the browser http://myupdox.com/central/setup.exe then click enter).
3. Depending on your web browser you'll either be prompted to **Run** the file or **Download** the file then run it.
4. When the Install Wizard opens follow the instructions to complete the installation. This process will place the Updox Central icon on your computer desktop.
    - Updox Central requires Microsoft .Net4 framework, if you're prompted to install it, do so.
5. If the Updox Central user interface doesn't open after the installation is complete, double click the desktop icon.
6. Go to the Updox web application to find the integration key for your practice:
    - Click **MENU**.
    - Click **Admin**.
    - Click **Practice Information**.
    - Copy the value in the **Your integration key is** field.
7. Go back to Updox Central:
    - Paste (or enter) the integration key.
    - Check the box for **Run Updox Central as a Service**.
    - To enable using a virtual printer to upload documents into Updox:
        - Check the box for **Enable Printer**.
        - For details on the printer installation, refer to the Install a Virtual Printer article.
    - To automatically load files from a Non-Fax Server location:
        - Click the **Files** tab.
        - Check the box for **Enable File Auto-Upload Folder**
        - Select the location of an existing folder for Updox Central to monitor.
        - Click **OK**.
        - If you want to limit which file types can be uploaded, enter the file extension(s) in **File types to upload** field (e.g. pdf, docx, etc.). Leaving the field blank enables all file types.
    - To automatically load files from a Fax Server:
        - Click the **Files** tab.
        - Check the box for **Enable Fax Auto-Upload Folder**
        - Select the location of an existing folder for Updox Central to monitor. (Note: must be a different folder than the one chosen for the Enable File Auto-Upload Folder.)
        - Click **OK**.
        - If you want to limit which file types can be uploaded, enter the file extension(s) in **File types to upload** field. Leaving the field blank enables all file types.
8. To exit Updox Central, click **Close**.

9. Next, install the Amazing Charts Plugin.

Install the Amazing Charts Plugin

Location: Updox Central

The Amazing Charts Plugin is the magic that enables you to import documents from Updox into a patient's chart in Amazing Charts. This installation is a required step in your implementation.

Before installing the plugin:

- Verify Updox Central is installed.
- If the Updox-Sync/Updox Connector is installed, uninstall it.

To install the plugin:

1. Go to Updox Central.
2. Click **Plugins** tab.
3. Click **Amazing Charts** plugin.
4. Click **Install** button.
5. In the Install pop-up window, the appropriate folder should pre-fill. If it doesn't, browse to the folder containing the Amazing Charts program.
6. Click **Close**. The Updox Central window reopens.
7. Click **Close** to exit Updox Central.

The plugin for Updox Central replaces the Updox-Sync/Updox Connector.

Map Users Between Amazing Charts and Updox

Location: Admin

The mapping process translates a user in the Amazing Charts system with the corresponding user in the Updox system. This enables a user to access Updox from within Amazing Charts without signing into the Updox application.

To use this feature you must have Admin privileges.

To map users between Amazing Charts and Updox:

1. Click **MENU** > **Admin** > **AC User Mapping**.
2. For each user in the Amazing Charts column, select the corresponding user in the Updox column.
3. If there isn't a corresponding user, select **None**.
4. Click **Save**.

Uninstall the Updox Connector for Amazing Charts

Location: Your Computer

	The Updox Connector for Amazing Charts must be running before you can uninstall it.

To uninstall the Updox Connector:

1. Right click the **Updox Connector icon** in the task bar (lower right).
    - If the icon isn't present, double click the Updox Connector for Amazing Charts icon on your computer desktop.
2. Select **Settings**. A new window opens.
3. Uncheck **Start automatically with Windows**.
4. Click **Uninstall**.
5. Confirm to uninstall.
6. Do not click the window that pops up. The system will automatically select the correct option.

Advanced Users

If there are any issues it can be helpful to know the registry key which controls the Connector auto-start. The key is:

- HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Run\UpdoxConnectorForAmazingCharts

Amazing Charts Using the Inbox

This section covers the Amazing Charts specific Inbox features.

Amazing Charts - Import Demographics/Insurance from Portal to EHR

Location: Workspace

To import into the patient's chart in the EHR:

1. In the Workspace, click on the **>** to expand the item containing demographic or insurance updates sent from the patient portal.
2. To view information about the patient, click **VIEW PATIENT**.
3. To import the demographic/insurance changes into the patient's chart:
    - Click in the **checkbox** for each information section to import (or uncheck those not to import).
    - Click **SEND TO EHR**.
    - This sends the information and moves the item to the Archive folder.
1. To move the item into the Archive folder without importing any of the information, click **DONE/ARCHIVE**.

	The information selected for import will overwrite existing information in the patient's chart.

Chiropad

This section contains articles specific to Chiropad.

Install the Chiropad Plugin

Location: Updox Central

The Chiropad Plugin is the magic that enables you to import documents from Updox into a patient's chart in Chiropad. This installation is a required step in your implementation.

Before installing the plugin:

- Verify Updox Central is installed.
- If the Updox-Sync/Updox Connector is installed, uninstall it.

To install the plugin:

1. Go to Updox Central.
2. Click **Plugins** tab.
3. Click **Chiropad** plugin.
4. Click **Install** button.
5. Select **Main** or **Training** depending on which system you are installing into.
6. Click **Close**. The Updox Central window reopens.
7. Click **Close** to exit Updox Central.

The plugin for Updox Central replaces the Updox-Sync/Updox Connector.

Chiropad - Add a Form

Location: Admin

To add a Form you must have Admin privileges.

To add a Form:

1. Click **MENU** > **Admin** > **Forms**.
2. Click **New Form**.
3. Enter a **Title** for the form.
4. To activate the form, click **Active**.
5. To place the form on the portal in the public area (i.e. before the person logs in), click **Public**. This enables you to collect information before the person becomes a patient.
6. Once a patient/person completes a portal form it is sent to the practice Inbox by default. To send a form to a specific user or queue, search and select in **Submit To**.
7. To design your form:
    - Click **Add a field**.

- Select the **Type** of field.
    - Single-Line Text
    - Multi-Line Text
    - Date Picker
    - Label/Instructions
    - Section Heading
    - Spacer
    - Check Box
    - Radio Button List
    - Check Box List
- Enter a **Label** (name) for the field.
- To require an entry for the field, check **Required**.
- Enter a **Description**.
- In the **Key** field, enter the field destination where the information will be stored in the EHR system.
- Click the X to close the field window.
- Repeat step 7 for each field.

8. To edit a field, click the pencil icon.
9. To delete a field, click the minus sign icon.
10. To finish the form, click **Save**.

Greenway - Intergy

This section contains articles specific to Greenway - Intergy.

Intergy - Send to EHR

Location: Workspace

The Tasking feature is available upon request. If you don't have it and want it let us know by contacting support@updox.com.

To use the Tasking feature you need to be on Intergy version 10.00.00.00 or higher.

One of the options in the **Send To** feature is sending documents to the EHR system to be imported. The Intergy EHR has two destinations available: 1) the patient's chart or 2) assign a task to a user.

To use this feature:

1. In the Workspace, click on the **>** to expand the item.
2. Click **SEND TO**.
3. In the **Search** box enter the patient's name.
    - Select the patient.
    - Click **Send to EHR**.
    - Click **OK**.
4. **Destination** - Select either Import to Chart or Assign Task.
5. If **Import to Chart** is selected:
    - Select a **Category**. If there are more than 10 in the list you can search for the category.
    - Enter **Date of item**.

5. If **Assign Task** is selected, select the user to be assigned the task.
6. If you want to attach one or more documents, check **Include attachments**.
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - If you want to rearrange the documents, click on the document then drag it to another position in the attachment list.
7. Click **SEND**.

Greenway PrimeSuite

This section contains articles specific to Greenway PrimeSuite.

Import into Greenway PrimeSUITE

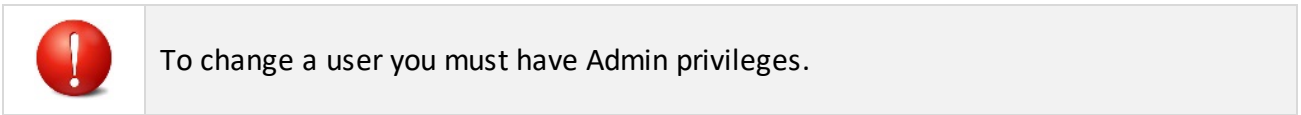
Location: Workspace

The **Send To** feature lets you forward an item to another user, patient, contact, or to a patient's chart in the EHR system. This article is specific to importing into the patient's chart in PrimeSUITE.

1. In the Workspace, click on the **>** to expand the item.
2. To import attachments, place a check in the box for each attachment.
3. Click **SEND TO**.
4. In the **Search** box enter the patient's name then select the patient from the list.
5. Click **Send to EHR** chart.
6. Click **OK**.
7. Select **Destination**:
    - **Patient's Chart**
    - **Document Import**
8. Enter a **Subject**.
9. Select **Category**.
10. Select **Notify doctor**.
11. Enter **Date of item**.
12. To sign off on the document, check **Sign off as me**.
13. To include the document history, check **Include history (as shown in history section above).**
14. Optionally enter **Notes**.
15. Click **SEND**.

Greenway PrimeSuite – User Setup for Document Sign Off

Location: Admin



To enable a user to sign off on a document as part of the import into the patient's chart in PrimeSUITE:

1. Click **MENU** > **Admin** > **Users**.
2. Click on the user.

3. Select the user's name in the **EHR User ID** drop down box.
4. Click **Save.**

Greenway DirectTrust Activation

The DirectTrust Activation enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network.

Security is the key component that distinguishes Direct messaging from regular email. In order to exchange Direct messages both the sender and receiver need to validate "who they say they are". This is accomplished by verifying the identity of each user before issuing a Direct address to them.

Only one person (the practice representative) completes the DirectTrust Activation process. That person is then responsible to verify the identity of other users given a Direct address at the practice. Typically, a person's identity is verified during the hiring process so no further action is usually needed by the representative (e.g. I9 Employment form, copy of passport or driver's license).

The DirectTrust Activation process consists of three parts:

- Government ID verification (NPI number)
- Financial ID verification (credit card)
- Confirmation number and voice recording

	All the sections of this process pertain to a single "person". It's that person's identity that is being verified, not the practice.
	Concerned about using your credit card? Don't be, this is simply an identity verification and does not affect your credit report or credit score. There is no charge to your card. All the information is kept secure through encryption and your credit card number is not saved.
	The practice representative must have an individual National Provider ID (NPI) and a personal credit card.
	If the representative leaves the practice, another person needs to assume the role and complete this identity verification process.

DirectTrust Activation

1. Go to the DirectTrust Activation page as specified by your EHR system.
2. Enter the practice **Site ID**.
3. Enter your individual **National Provider ID (NPI)** then hit the **<Tab>** key.
    - Use your individual NPI, not the one for the practice.
    - It's OK if your practice name and/or address are out of date. Please continue with this process.
4. Enter your **Direct User Name**
    - This is the part of your Direct address that is left of the @ sign (e.g. jsmith).
5. Enter a **Direct Subdomain**
    - This is the part of the Direct address that is right of the @ sign and before .gwaydirect.com (e.g. abcmed). It applies to the practice as a whole.

- The full Direct address example = jsmith@abcmed.gwaydirect.com.

6. For the Voice Validation section:
   - Enter your **Phone Number**. Use a number where you can be reached during the registration process without going through a receptionist or automated routing system (e.g. cell phone).
   - Click **Call Me**.
   - Enter the **Confirmation Code**.
   - State your name, practice name, and that you are an authorized representative of your practice. Hang up the call.
7. For the Financial ID section, enter your:
   - **First Name and Last Name -** As shown on your personal credit card
   - **Date of Birth**
   - **Phone Number -** Enter numbers only; no dashes, parentheses, letters, etc.
   - **Email Address**
   - **Credit Card Number**
   - **Credit Card Billing Address, City, State, Zip Code -** Must be the billing address associated with the credit card number.
8. If true, check the box **I certify this practice is HIPAA compliant**.
9. Before completing the last step verify that your information is correct.
10. Click **Validate**.
    - If all three items are a green **VERIFIED**, congratulations you're all finished.
    - If one or more of the items are red **NOT VERIFIED**:
      - Verify your information is correct; enter changes as needed.
      - If your identity verification failed due to the credit card, try another card.
      - Click **Validate**.
      - If the validation still fails, repeat this process with a different provider.
      - If still no success, click **Get Help**.

You have up to 3 attempts before your account is locked. If that occurs, click **Get Help**.

Single Signon Map Users Between Greenway PrimeSuite and Updox

Location: Admin

The mapping process translates a user in the Greenway PrimeSUITE system with the corresponding user in the Updox system. This enables a user to use single signon (i.e. user doesn't need to log into Updox separately).

To use this feature you must have Admin privileges.

To map users between Greenway and Updox:

1. Click **MENU** > **Admin** > **Greenway User Mapping**.
2. For each user in the Greenway column, select the corresponding user in the Updox column.
3. If a user should not have the single signon feature to launch Updox, select **None**.
4. Click **Save**.

Greenway PrimeSuite – Print or Send Multiple Patient Documents

Location: Address Book

This feature enables you to obtain patient documents from PrimeSUITE and then Print or Send them as needed.

To send multiple patient documents:

1. Click **Address Book**
2. Enter patient's name in the **Search** box then select the patient.
3. If the patient isn't in the list, click **FIND IN EHR** (scroll down if the button isn't visible).
    - Enter patient's first name, last name, date of birth, and/or ID, then click **SEARCH**.
    - Select one or more patients (the status column indicates if the patient is in Updox).
    - Click **SYNC**.
4. Click **Document Queue** tab.
5. To select one or more documents, check the checkbox before each document.
6. To select all documents, check the checkbox in the column heading (before Document Title).
7. Click **Continue**. This creates an item in the Inbox with the selected documents attached.
8. Go to **Inbox**. (To refresh: click another folder then click Inbox).
9. In the Workspace, click on the **>** to expand the item.
10. To print the documents:
    - Check the checkbox of each document to print.
    - Click **OPTIONS**.
    - Click **Print**.
11. To send the documents:
    - Check the checkbox of each document to send.
    - Click **SEND ITEM**.
    - Refer to Send To article for the detailed steps.

Greenway PrimeSuite - Send to EHR

Location: Workspace

The **Send To** feature lets you forward an item to another user, patient, contact, or to a patient's chart in the EHR system. This article is about sending to the EHR.

To import into the patient's chart in the EHR:

1. In the Workspace, click on the **>** to expand the item.
2. Click **SEND TO**.
3. In the **Search** box enter the patient's name.
    - Select the patient.
    - Click **Send to EHR**.
    - Click **OK**.
4. If the patient isn't in Updox but is in Greenway PrimeSUITE:
    - Click **FIND IN EHR** (scroll down if the button isn't visible).
    - Enter patient's first name, last name, date of birth, and/or ID, then click **SEARCH**.
    - Select one or more patients (the status column indicates if the patient is in Updox).
    - Click **SYNC**.
5. Enter a **Subject**.
6. Select **Destination**:
    - Patient's Chart
    - Document Import
7. Select a **Category**. If there are more than 10 in the list you can search for the category.
8. Select a provider for **Notify doctor** (optional). If there are more than 10 in the list you can search for

the person. To remove your selection, click **None**.

9. Enter **Date of item**.
10. If you want to sign off on the document, check **Sign off**.
11. To assign to someone else, select the person in **Assign to**.
12. If you want to include the document history, check **Include history (as shown in history section above).**
13. If you want to attach one or more documents, check **Include attachments**.
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - If you want to rearrange the documents, click on the document then drag it to another position in the attachment list.
13. Click **SEND**.

Greenway PrimeSuite - Compose an Email Message

Location: Home Page

The Compose feature lets you send a Direct message, a secure message to the patient portal, an email, or a fax. This article is specific to composing an email message.

1. Click **Compose**
2. In the **Search** box enter the recipient's name, direct address, email address or fax number.
    - If the recipient is already in your address book, select them from the list, then click **OK**.
    - If the recipient isn't in your address book:
        - Enter the email address in the Search box.
        - Click **Create and send to**.
        - Enter the first name, last name, and company.
    - If the recipient is a patient who isn't in Updox but is in Greenway PrimeSUITE:
        - Click **FIND IN EHR** (scroll down if the button isn't visible).
        - Enter patient's first name, last name, date of birth, and/or ID, then click **SEARCH**.
        - Select one or more patients (the status column indicates if the patient is in Updox).
        - Click **SYNC**.
3. Enter a Subject.
4. Select the from address:
    - To send from your address, uncheck **Send as Practice**.
    - To send from the practice address, check **Send as Practice**.
5. To attach one or more documents, check **Include attachments**.
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - To rearrange the documents, click on the document then drag it to another position in the attachment list.
6. Enter the message text.
    - To format the text, use the **bold**, **italics**, and **underline** buttons.
    - To use pre-defined templates, click the **Templates** button.
7. To send a message to another recipient:
    - Enter their name or address in the box: **Search for additional contacts or users…**
    - Repeat the steps above starting with the bullets under Step 2.
8. Click **SEND**.

If a recipient has an email address, a Direct address, and/or a fax number the Address Book and Compose Search window will have multiple entries for the same recipient. To determine which one you need, click on the recipient then verify if the address is correct. If so, proceed with the message. If not, click Back to select a different entry for this recipient.

Greenway PrimeSuite - Fax Setup Checklist

Location: Admin

To complete the fax setup you must have Admin privileges.

Setup steps for faxing:

- ? Decide if you want to port your existing fax number or use a new number.
- ? If porting, complete the Port Your Fax Number process.
- ? As an alternative, you can use Fax Call Forwarding instead of porting or getting a new number.
- ? Define Fax Settings
- ? Define Fax Coversheet
- ? Map Greenway users to Updox users to enable the single sign-on feature.

Compose a Direct Message

Location: Home Page

The Compose feature lets you send a Direct message to another recipient in the **DirectTrust network**.

You must have a Direct address defined before using this feature.
Direct messaging must only be used for healthcare purposes.

1. Click **Compose.**
2. Select a **To** address:
   - If the recipient is in your address book, enter their name or Direct address.
   - If you don't know the recipient's Direct address, click **Find in Directory**. This directory includes all of the Updox Direct addresses as well as addresses in the DirectTrust Provider directory.
3. Enter a **Subject**.
4. Enter the message text.
5. Click **SEND**.

Practice Fusion

This section contains articles specific to Fusion

PracticeFusion DirectTrust Activation

The DirectTrust Activation enables you to send Direct messages to providers outside of your practice who are also part of the DirectTrust network.

Security is the key component that distinguishes Direct messaging from regular email. In order to exchange Direct messages both the sender and receiver need to validate "who they say they are". This is accomplished by verifying the identity of each user before issuing a Direct address to them.

The identity verification can be accomplished in one of two ways which is determined by your EHR software vendor:

- Organizational Level (most common)
- Address Level

For Organizational Level, only one person (the practice representative) completes the DirectTrust Activation process. That person is then responsible to verify the identity of other users given a Direct address at the practice. Typically, a person's identity is verified during the hiring process so no further action is usually needed by the representative (e.g. I9 Employment form, copy of passport or driver's license).

For Address Level, every person receiving a Direct address must complete the DirectTrust Activation process.

The DirectTrust Activation process consists of three parts:

- Government ID verification (NPI number)
- Financial ID verification (credit card)
- Confirmation number and voice recording

	All the sections of this process pertain to a single "person". It's that person's identity that is being verified, not the practice.

	Concerned about using your credit card? Don't be, this is simply an identity verification and does not affect your credit report or credit score. There is no charge to your card. All the information is kept secure through encryption and your credit card number is not saved.

	The practice representative must have an individual National Provider ID (NPI) and a personal credit card.

	If the representative leaves the practice, another person needs to assume the role and complete this identity verification process.

DirectTrust Activation

1. Refer to the instructions provided by PracticeFusion.

Define Patient Payment User Settings - Practice Fusion

Location: Admin

	You need Admin privileges to complete this function.

To define your patient payment user settings:

1. Click **MENU** > **Admin** > **Users.**
2. Select an existing user or add a new user.
3. Click **Settings** tab.
4. To grant a user access to the Patient Payments function, check **Can bill patient's credit cards.** (automatically set to on for all users in Practice Fusion)
5. To grant a user access to the Patient Payments billing reports, check **Can view billing reports**. (automatically set to on for all users in Practice Fusion)
6. Click **Save**.

Mohegan

This section contains articles specific to the Mohegan implementation which customizes the secure messaging functionality to meet their unique communication needs. The customization includes the ability to:

- Divide the Inbox between separate departments within the Mohegan Government
- Assign users to specific governmental departments
- Create sub-categories of Patient Portal users to control access to the Mohegan departments
- Assign specific department users to groupings of Patient Portal Users, dependent on the first letters of the Patient Portal Users' last names
- Route messages from Patient Portal users to their selected default user in the specific governmental departments
- Route forms from Patient Portal users to their selected default user in the specific governmental departments
- Assign substitute users when the primary user is absent (e.g. vacation, leave) for receiving messages and forms from the Patient Portal

Mohegan Setup

This section walks you through the steps to configure the Mohegan implementation.

Mohegan Specific Setup Checklist

? **Define Practice Information**
? **Define Practice Settings**
? **Manage Departments** (requires coordination with Updox)
? **Add Users**
? **Assign Users to Departments**
? **Assign Users to Patient Alphabet Letters**
? **Define Patient Portal Settings**
? **Create Patient Portal Accounts**
? **Define Queues (Substitute Users)**
? **Define Forms**

Mohegan - Manage Departments

Location: Admin

The Manage Departments function provides the ability to divide the Inbox between separate and distinct departments within the Mohegan Government. This enables the users in the various departments to have access to the items specific to their department.

Adding new departments should be carefully coordinated with Updox, as it will affect many places in the user interface. Portal Users will not have access to newly added departments until changes are made behind the scenes to allow visibility.

To add a department:

1. Click **MENU** > **Admin** > **Manage Departments.**
2. Click **New**.
3. Enter the **Department Name**.
4. Enter the **Sort Order**.
    - Sort Order is a number that controls the order in which locations will be listed, the lowest number appears first in the list. Numbers need not be consecutive (e.g. you can use 10, 20, 30, 40 in order to fit new values in between existing values)
5. The remaining fields are informational only and are not visible to Portal users.
6. Click **Save**.

To change a department name and/or sort order:

1. Click **MENU** > **Admin** > **Locations.**
2. Click the department to change.
3. Enter the revised name.
4. Enter the revised sort order.
5. Click **Save**.

To deactivate a department:

1. First remove the department designation from any users or patients that are assigned to the department.
2. Go to **MENU** > **Admin** > **Manage Departments**.
3. Select the department.
4. Uncheck **Active**.
5. Click **Save**.

Mohegan - Assign Users to Departments

Location: Admin

Assigning a user to a department enables the user to:

- access the department's Inbox
- appear as an optional recipient for Portal users sending a message to that Department
- optionally be assigned to a sub-set of Portal users by last name

To manage users you must have Admin privileges.

To assign a user to a department:

1. Click **MENU** > **Admin** > **Users**.
2. Click an existing user.
3. Click the **Assign to Location** tab.
4. Check the box for each department the user is allowed to access.
5. Click **Save**.

Mohegan - Assign Users to Patient Alphabet Letter(s)

Location: Admin

This is an optional function that enables you to assign patients to specific department users or groups of users (**queues**) based on the beginning letter(s) in a patient's last name. A user's range begins with their assigned letter and ends just before the letter assigned to the next user. You can use multiple letters (up to 4) to sub-divide the patient alphabet even further, if needed. For example:

Letter(s)	Department User	Patient Last Name Range
A	Sally Walters	A, B, C, D, E
F	Tim Jackson	F up to names beginning with Fl
Fl	Joan Stevens	Fl through the rest of the F names
K	John Hart	K, L. M, N, O, P, Q
R	Bill Harris	R, S, T, U, V, W, X, Y, Z

Queues

A Queue is a group of users that have access to the same Inbox and provide a great way to handle user absences (e.g. vacation, sick leave). Instead of assigning patients to a single user you can assign them to a Queue instead. See the **Manage Queues** article for details on adding Queues.

Departments that do not want to utilize this functionality may completely ignore it. Portal users will stil be able to select a recipient from the departmental dropdown list in the Portal when sending a message or form.

To assign users/queues to patients:

1. Go to **Admin** > **Patient Portal**.
2. Click the **Assign Users to Patients** tab.
3. Select a department (location).
4. Click **ADD NEW GROUP**.
5. In the first box enter an alphabet letter(s) to assign to a user or queue.
6. In the second box, select the department user or queue.
7. Repeat steps 4 - 6 for each user to be assigned a letter range.
8. Click **SAVE**.
9. Repeat steps 1 - 8 for each department, as needed.

Mohegan - Manage Portal Users

Location: Address Book

This function lets you manage your Portal users. The category and sub-category control which Mohegan department the user can contact.

To add a Portal User:

1. Click **ADDRESS BOOK**.
2. Click **New**.
3. Select **Add a Contact/Patient**.
4. If adding a contact or patient, enter the following information:
    - **Prefix**
    - **First Name**
    - **Middle Name**
    - **Last Name**
    - **Suffix**
    - **Business Name**
    - **DOB**
    - **Category**
        - Patient
        - Mohegan Contact (for use with contacts within the Tribe)
        - Other (for contacts outside the Tribe, such as outside medical practitioners or specialists)
    - **Patient Type (Sub-category)** (this field determines which Mohegan department the portal user can contact)
        - Tribal Government Employee
        - Tribal Member Employee
        - Tribe Member
        - Spouse of Tribe Member
        - Widowed Spouse of Tribe Member
        - Mohegan Sun Employee
    - **Email**
        - This field is used for a standard email address or a Direct address.
        - If the contact has both, create two entries in the address book.
    - **Home Phone**
    - **Fax Number**
    - **Sex**
    - **EHR Patient ID**
    - **Default Provider**
        - Applicable to select EHR systems
    - **Address 1**
    - **Address 2**
    - **City**
    - **State**
    - **Zip**
    - **Cell Phone**
    - **Work Phone**
    - **Work Extension**
    - **Reminders Only By** (applicable only if the contact is a patient and the practice has purchased the Reminders product)
        - Practice Preference
        - Email
        - Telephone-Home
        - Telephone-Cell
        - Text Message
        - No Reminders

- **Voice Reminders Language** (applicable only if the contact is a patient and the practice has purchased the Reminders product)
    - English
    - Spanish

5. If adding a contact group (contact groups are for use with Faxing):
    - Enter a **Title**.
    - Search and select one or more existing contacts to add to the group.
    - If the contact doesn't already exist, click **Quick Add** to add the contact, then add them to the group.
    - To remove a contact from the group, click the **X** by the contact's name.
5. Click **Save**.
6. Click **X** to close the window.

To change a contact:

1. Click **ADDRESS BOOK**.
2. Enter the contact's name, address, or number in the Search box.
3. In the Search results list click the contact's name.
4. Enter changes.
5. Click **Save**.
6. Click **X** to close the window.

To inactivate a patient or contact in the Address Book:

1. Click **ADDRESS BOOK**.
2. Search for the patient or contact to inactivate.
3. Uncheck **Active**.
4. Click **Save**.
5. Click **X** to close the window.

To delete a contact in the Address Book (note: patient contacts cannot be deleted only inactivated)

1. Click **ADDRESS BOOK**.
2. Search for the contact to delete.
3. In the address book list, click on the contact to delete.
4. Scroll to the bottom of the page and click **DELETE CONTACT**.
5. Click **YES, CONTINUE THIS OPERATION**.

To update an existing contact group:

1. Click **ADDRESS BOOK**.
2. Search for the contact group.
3. Select the group to update.
4. Use the **Add Additional Individual Names** field to search and select contacts to add.
5. Click the X by an existing contact's name to remove them from the group.
6. Click **Save**.
7. Click **X** to close the window.

Mohegan Using the Portal

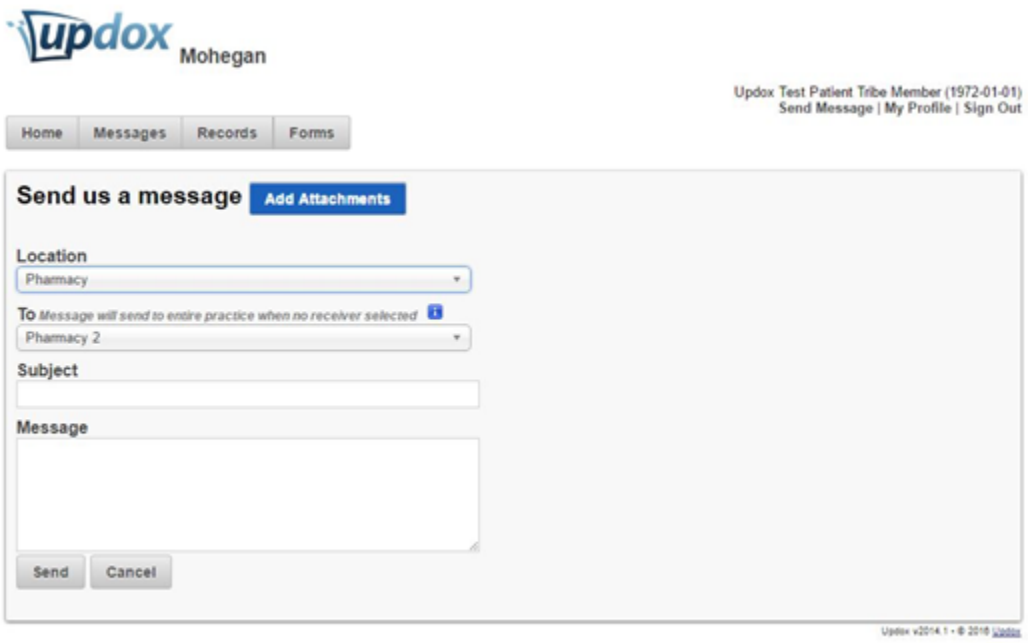
This section covers the Mohegan Patient Portal send message and submit forms functionality.

Mohegan Patient Portal - Send Messages

Location: Patient Portal

To send a message from the Patient Portal to a Mohegan department:

1. Sign into the Patient Portal.
2. Click **Send Message** (upper right corner).
3. In the **Location** box, select the Mohegan department.
4. In the **To** box, select the recipient within the department.
5. In the **Subject** box enter a message title.
6. In the **Message** box, enter the message text.
7. Click **Send**.



Mohegan Patient Portal - Send Forms

Location: Patient Portal

	First set up **forms** you want to have available in the Patient Portal.

To submit a form from the Patient Portal to a Mohegan department:

1. Sign into the Patient Portal.
2. Click **Forms** tab.
3. Select a Form.
4. Select one or more departments.
5. Complete the form.
6. Click **Submit Form**.

MicroMD

This section contains articles specific to MicroMD.

MicroMD Manage Practice Locations

Location: Admin

The MicroMD implementation enables practices to define locations that can be used with various Patient Portal functions (send messages, submit forms, request appointments, etc.)

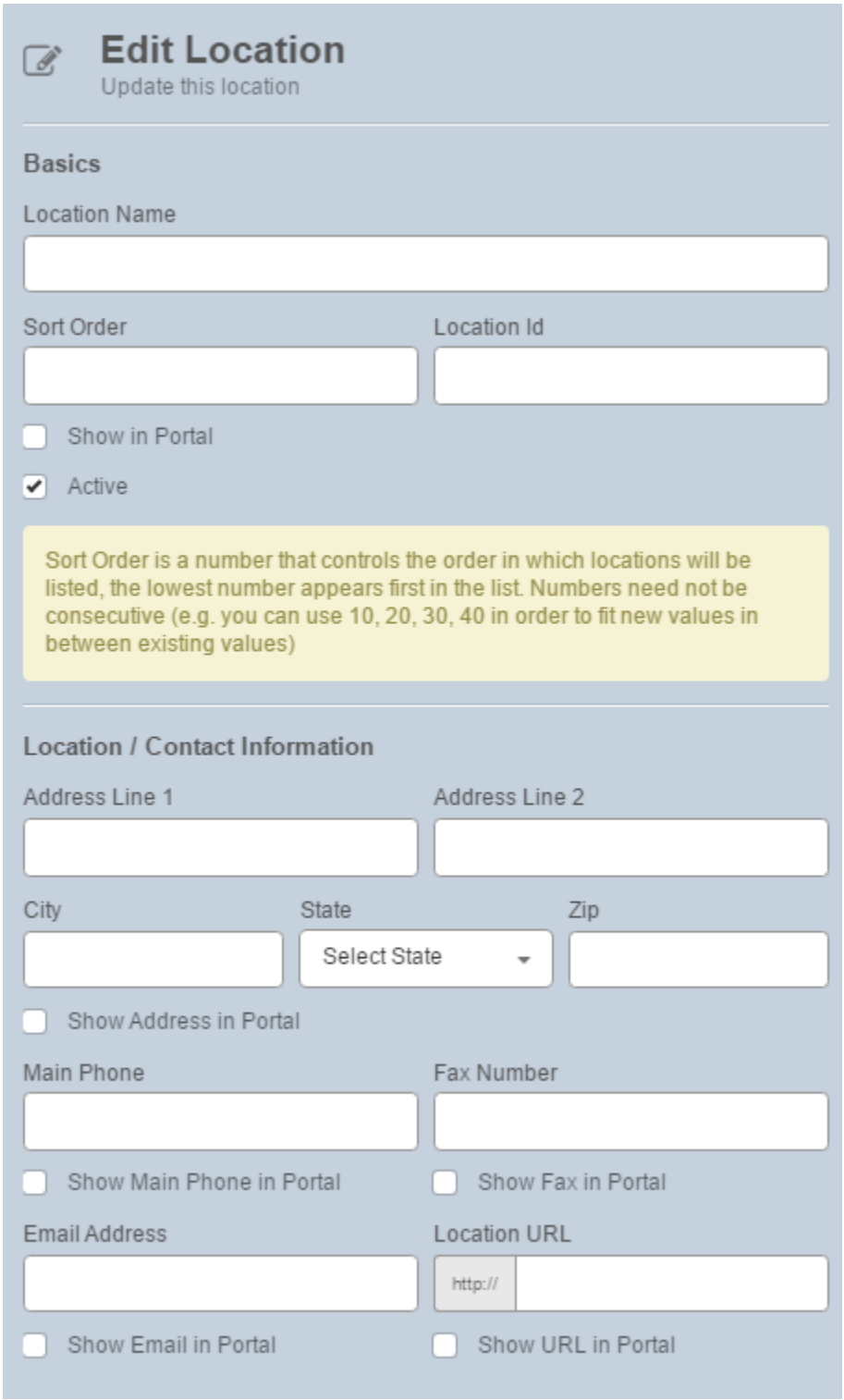
To add a location:

1. Go to **MENU** > **Admin** > **Manage Locations**.
2. Click **New**.
3. Enter the following information.
    - **Location Name**
    - **Sort Order**
        - Sort Order is a number that controls the order in which locations will be listed, the lowest number appears first in the list. Numbers need not be consecutive (e.g. you can use 10, 20, 30, 40 in order to fit new values in between existing values).
    - **Location Id**
        - If the location should be displayed in the Patient Portal, check the **Show in Portal** box.
    - **Address Line 1**
    - **Address Line 2**
    - **City**
    - **State**
    - **Zip**
        - If the address should be displayed in the Patient Portal, check the **Show address in Portal** box.
    - **Main Phone**
        - If the main phone should be displayed in the Patient Portal, check the **Show Main Phone in Portal** box.
    - **Fax Number**
        - If the fax number should be displayed in the Patient Portal, check the **Show Fax in Portal** box.
    - **Email Address**
        - If the email address should be displayed in the Patient Portal, check the **Show Email in Portal** box.
    - **Location URL**
        - If the location URL should be displayed in the Patient Portal, check the **Show URL in Portal** box.
    - **About/Additional Information**
        - If the additional information should be displayed in the Patient Portal, check the **Show About/Additional Information** in Portal box.
    - **Hours** - Check the **We are open** box by each day of the week and slide the hours bar to indicate start and end times.
        - **Sunday**
        - **Monday**
        - **Tuesday**
        - **Wednesday**
        - **Thursday**
        - **Friday**
        - **Saturday**
4. Click **Save**.

To deactivate a location:

1. First remove the location designation from any users or patients that are assigned to the location.
2. Go to **MENU** > **Admin** > **Manage Locations**.
3. Select the location.

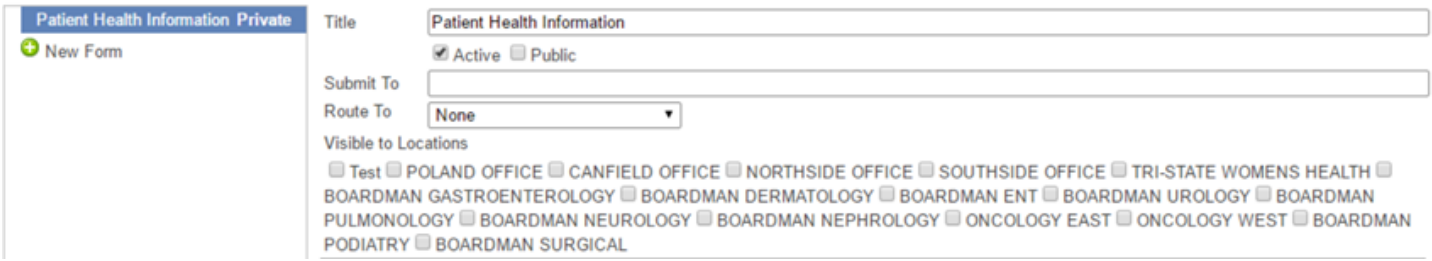
4. Uncheck **Active**.
5. Click **Save**.



MicroMD Manage Forms

Location: Admin

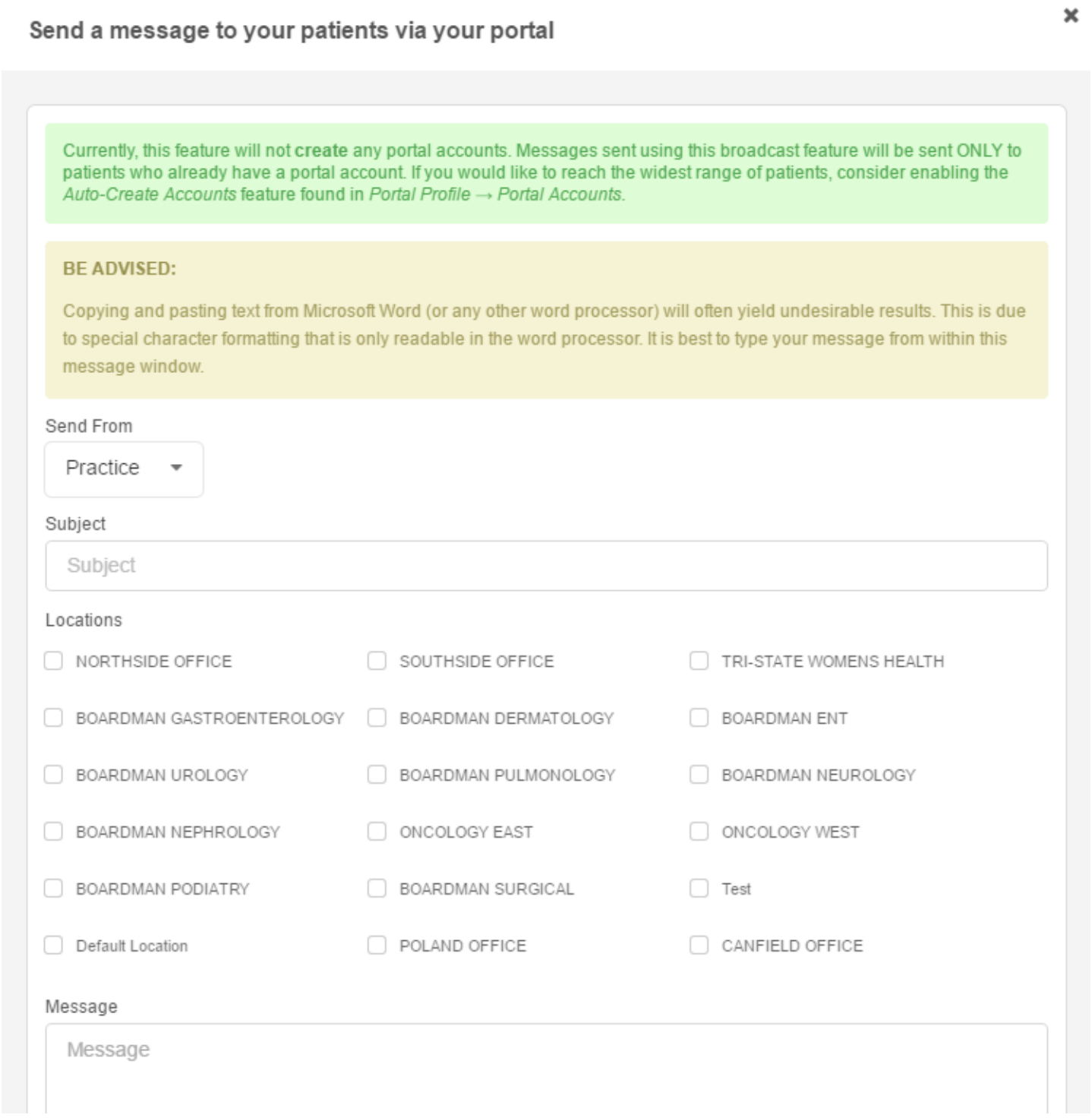
The MicroMD implementation enables practices to limit visibility of Patient Portal forms by location. For more information on forms see the **Manage Forms** article.



MicroMD Send Broadcast Message to Patient Portal

Location: Tools

The MicroMD implementation enables providers to send a broadcast message to patients based on location.



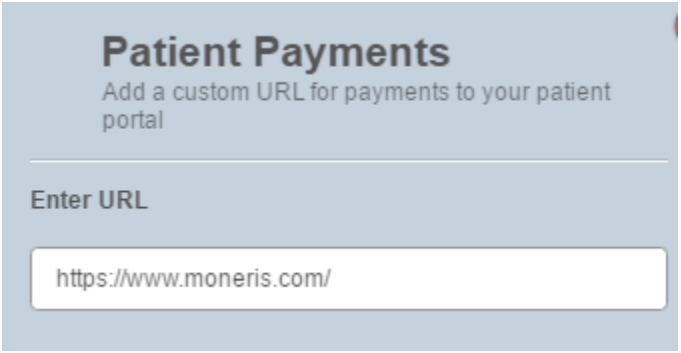
To send a message:

1. Go to **Tools** > **Patient Broadcast**.
2. In the **Send Form** box, select Practice.
3. In the **Subject** box, enter a title for the message.
4. In the **Locations** section, select one or more locations.
5. In the **Message** box, enter the message text.
6. Click **SEND**.

MicroMD Patient Payment URL

Location: Admin

The MicroMD implementation enables practices to specify the URL to the MicroMD payment processing application.



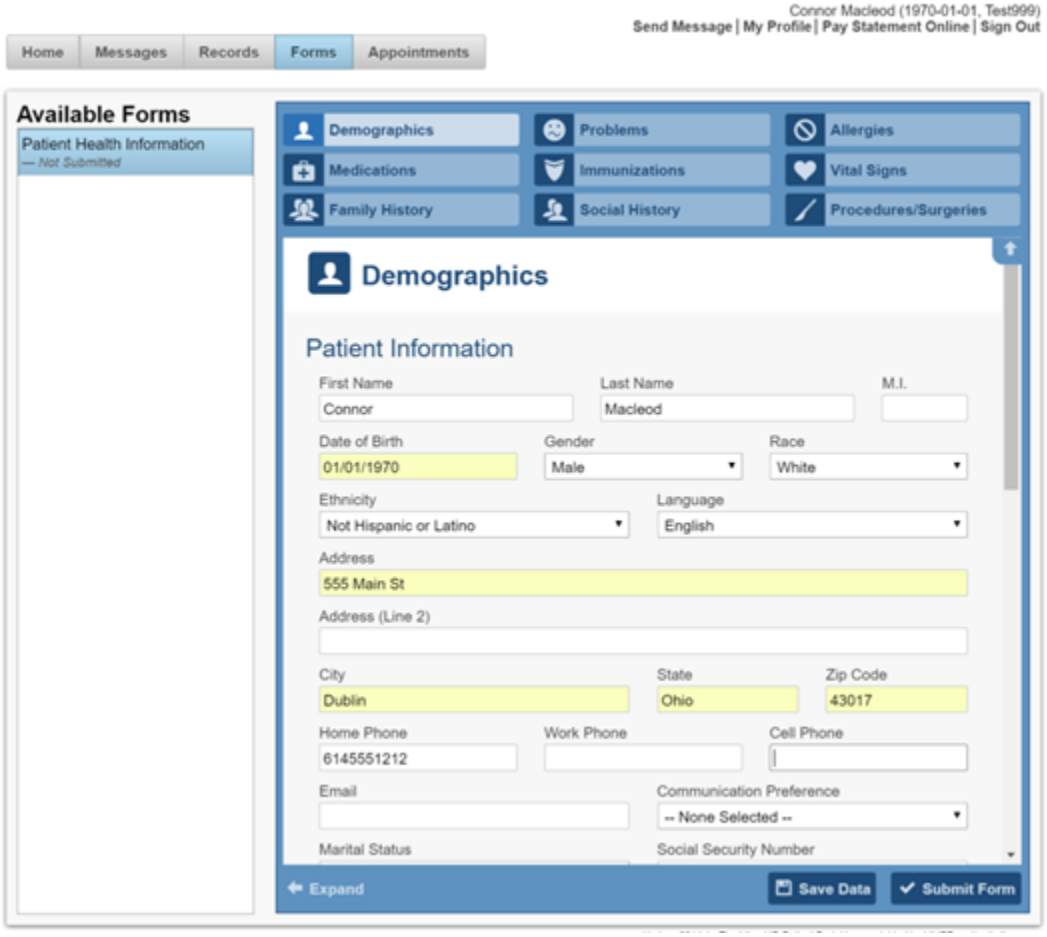
To enter:

1. Go to **Admin** > **MicroMD Patient Payment URL**.
2. Enter the **URL**.
3. **Click Save**.

MicroMD Patient Portal Forms

Location: Patient Portal

The MicroMD Patient Portal includes custom forms to enable patients to enter information corresponding to select sections of a Continuity of Care Document Summary (CCD). When submitted the information is sent to the MicroMD EHR for import.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Send Message | My Profile | Pay Statement Online | Sign Out
Home
Messages
Records
Forms
Appointments
Available Forms
Patient Health Information
— Not Submitted
Demographics
Problems
Allergies
Medications
Immunizations
Vital Signs
Family History
Social History
Procedures/Surgeries
Demographics
Patient Information
First Name
Connor
Last Name
Macleod
M.I.
Date of Birth
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Gender
Male
Race
White
Ethnicity
Not Hispanic or Latino
Language
English
Address
555 Main St
Address (Line 2)
City
Dublin
State
Ohio
Zip Code
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Work Phone
Cell Phone
Email
Communication Preference
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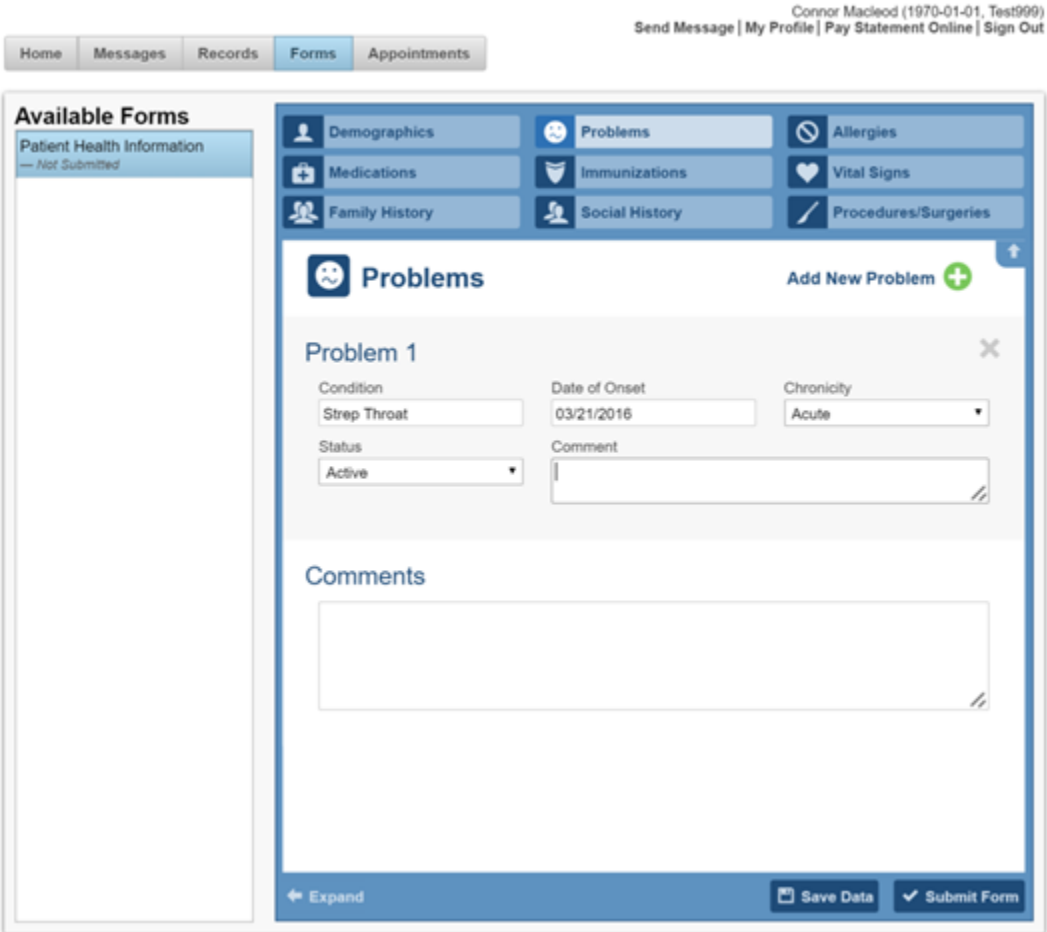
Marital Status
Social Security Number
Expand
Save Data
Submit Form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Medications
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Vital Signs
Family History
Social History
Procedures/Surgeries
Problems
Add New Problem
Problem 1
Condition
Strep Throat
Date of Onset
03/21/2016
Chronicity
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Status
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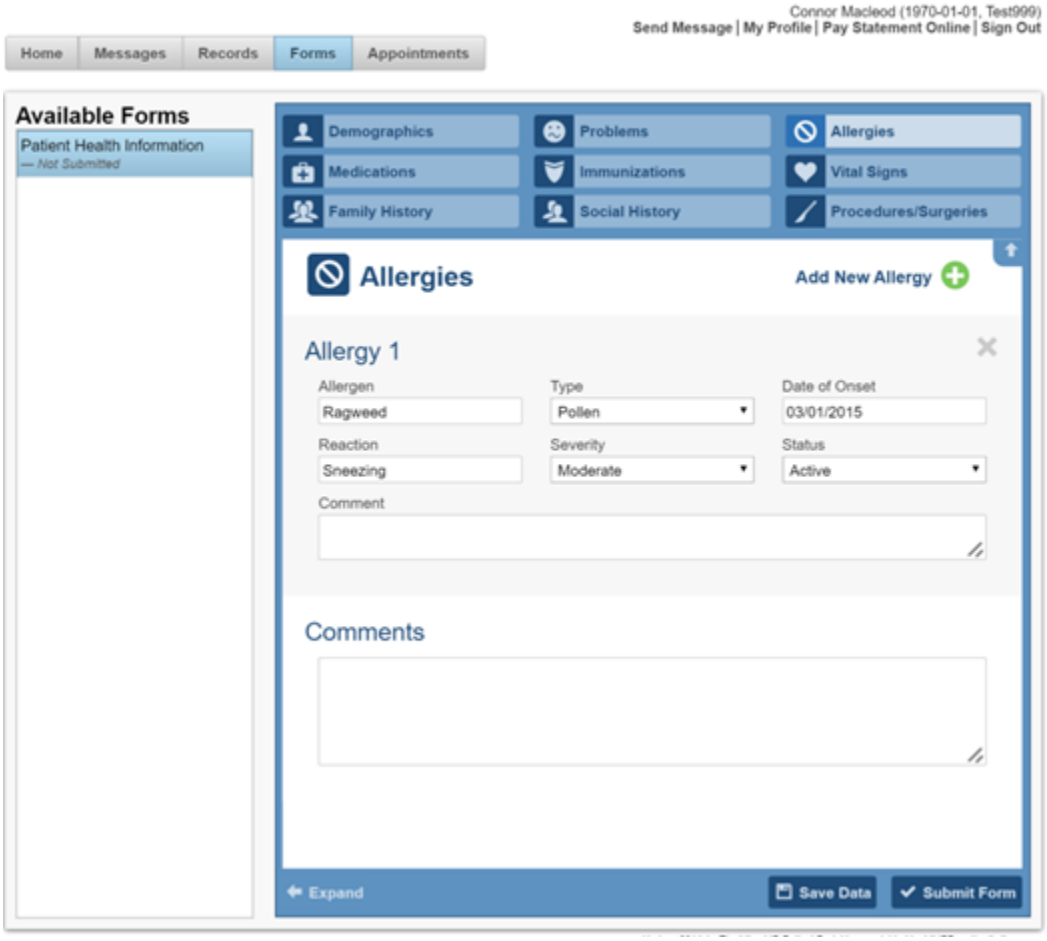
Comment
Comments
Expand
Save Data
Submit Form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Vital Signs
Family History
Social History
Procedures/Surgeries
Allergies
Add New Allergy
Allergy 1
Allergen
Ragweed
Type
Pollen
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Status
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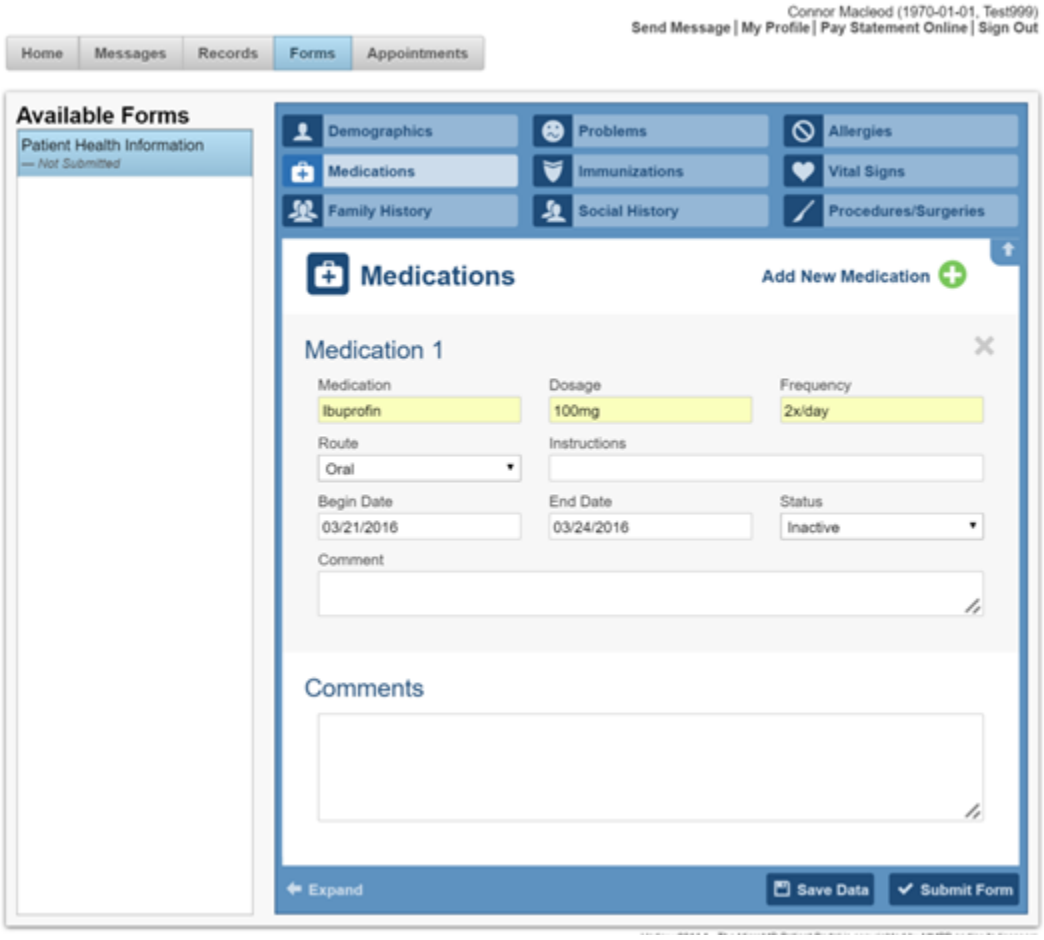
Comment
Comments
Expand
Save Data
Submit Form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Immunizations
Vital Signs
Family History
Social History
Procedures/Surgeries
Medications
Add New Medication
Medication 1
Medication
Ibuprofin
Dosage
100mg
Frequency
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Route
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Instructions
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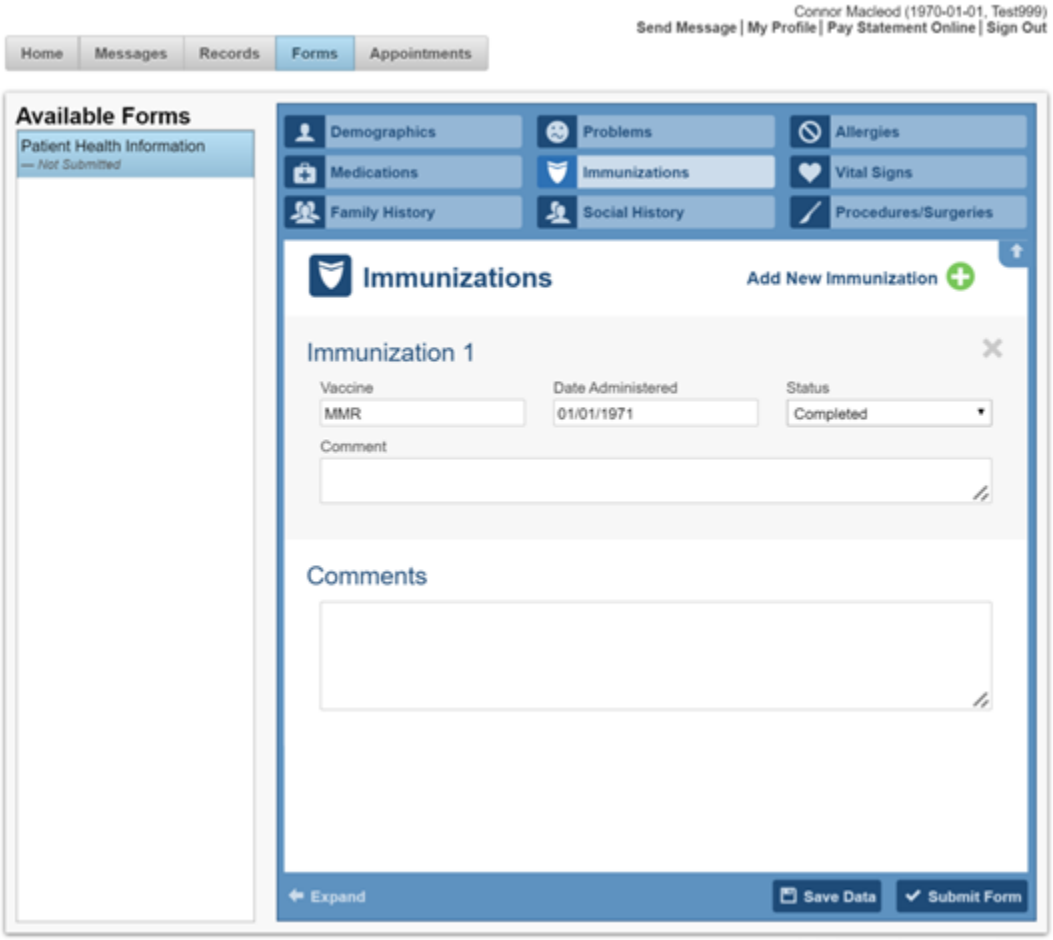
Inactive
Comment
Comments
Expand
Save Data
Submit Form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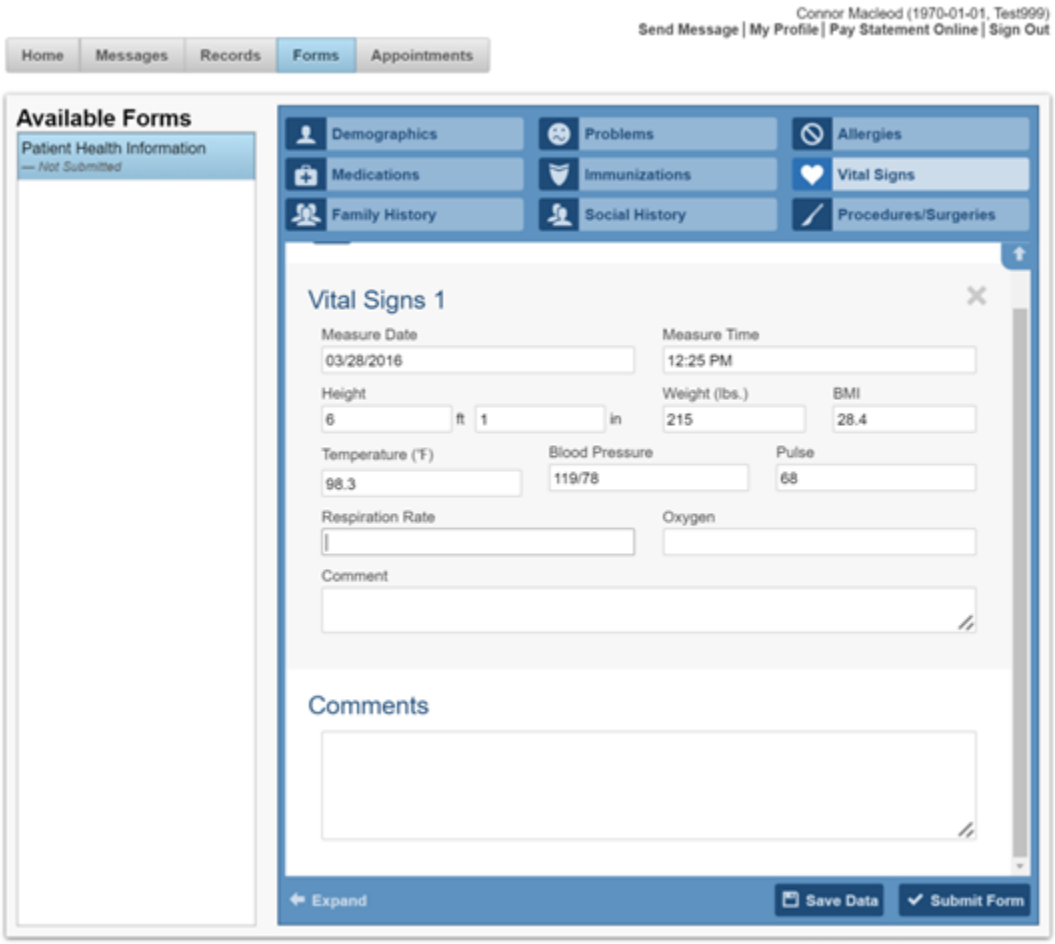
Medications
Immunizations
Vital Signs
Family History
Social History
Procedures/Surgeries
Immunizations
Add New Immunization
Immunization 1
Vaccine
MMR
Date Administered
01/01/1971
Status
Completed
Comment
Comments
Expand
Save Data
Submit Form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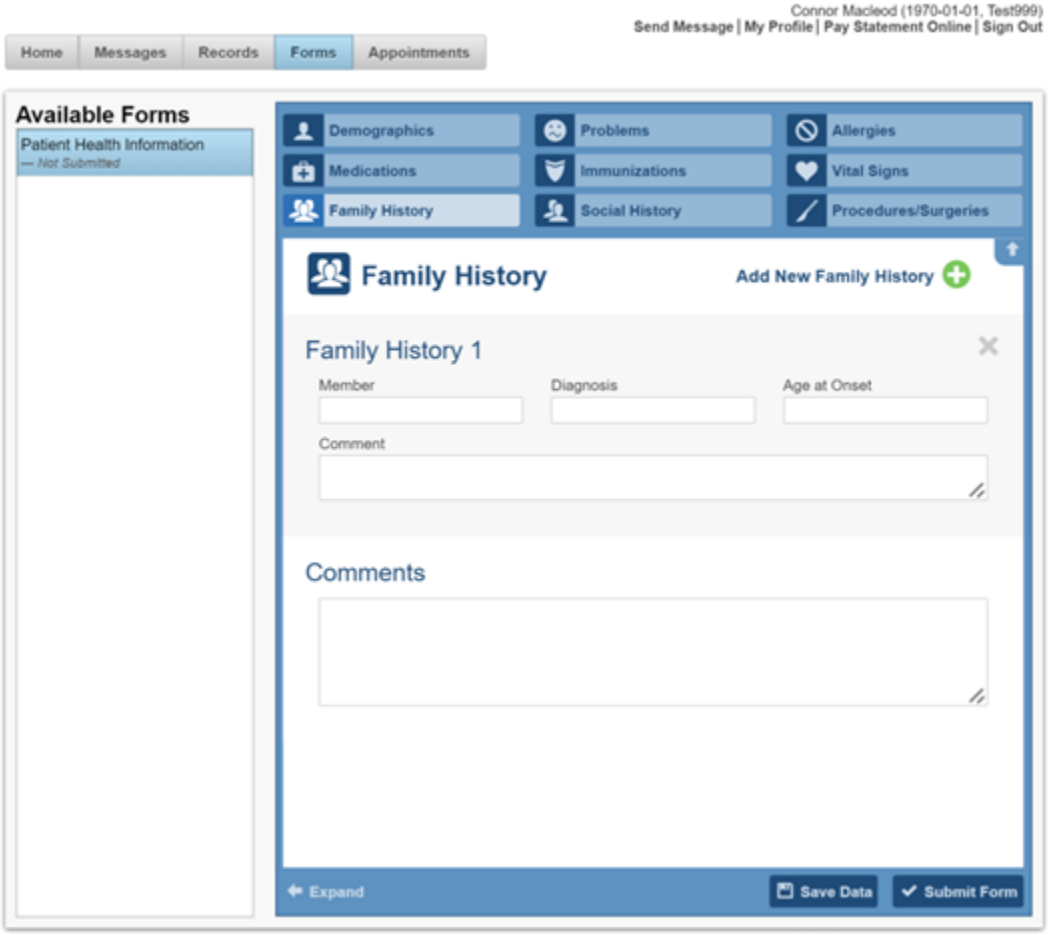
Vital Signs
Family History
Social History
Procedures/Surgeries
Vital Signs 1
Measure Date
03/28/2016
Measure Time
12:25 PM
Height
6
ft
1
in
Weight (lbs.)
215
BMI
28.4
Temperature (F)
98.3
Blood Pressure
119/78
Pulse
68
Respiration Rate
Oxygen
Comment
Comments
Expand
Save Data
Submit Form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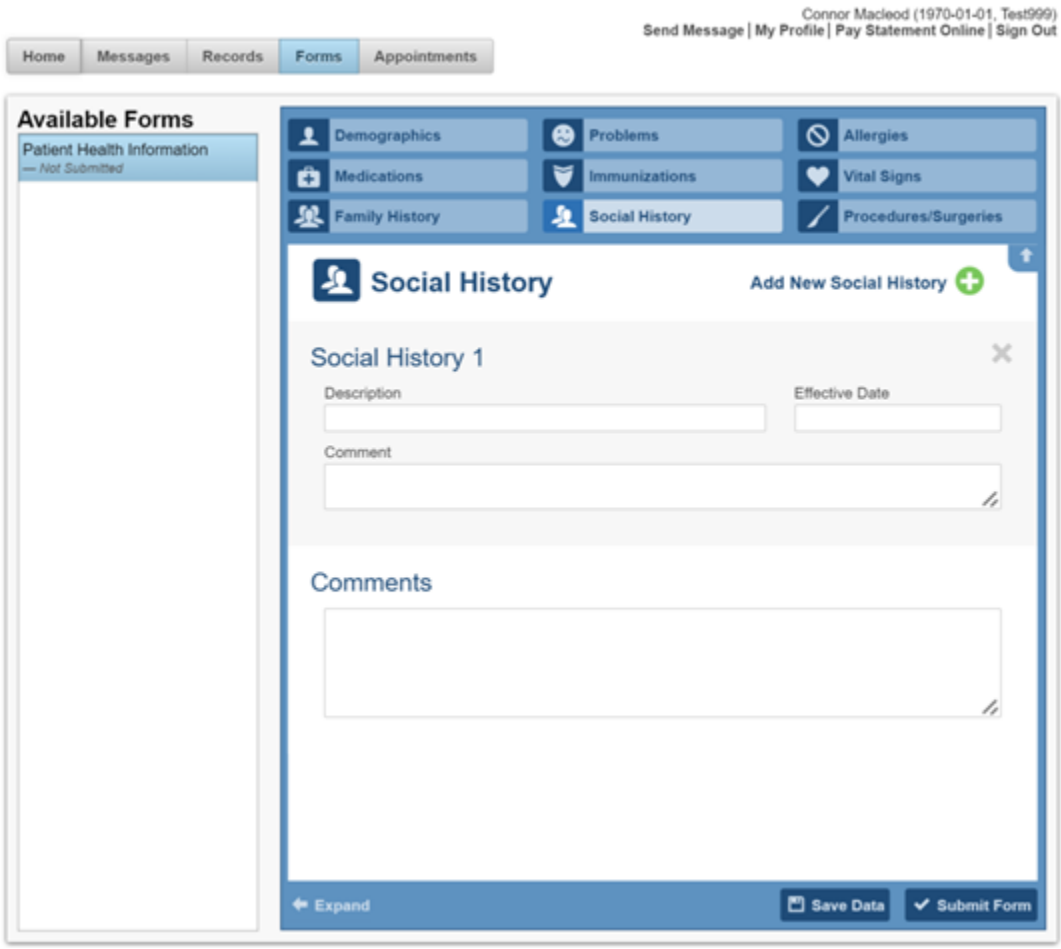
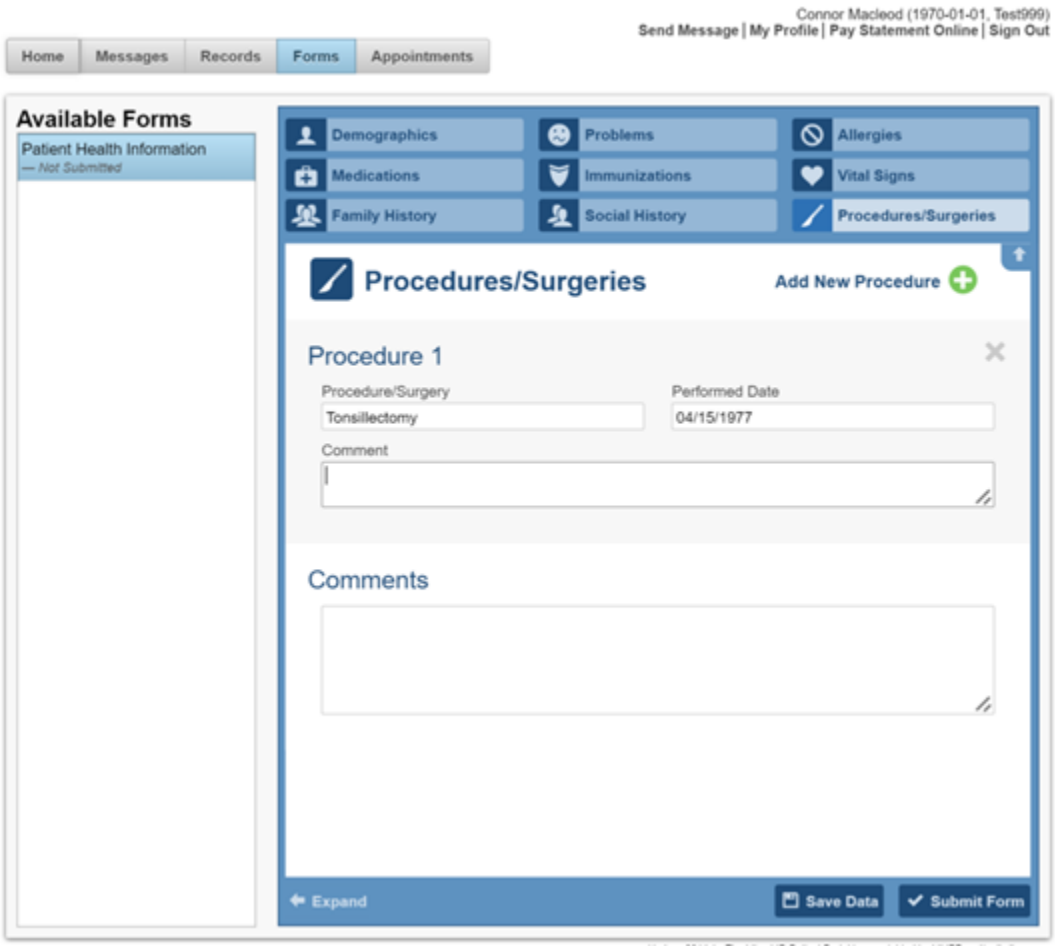
Family History
Social History
Procedures/Surgeries
Family History
Add New Family History
Family History 1
Member
Diagnosis
Age at Onset
Comment
Comments
Expand
Save Data
Submit Form

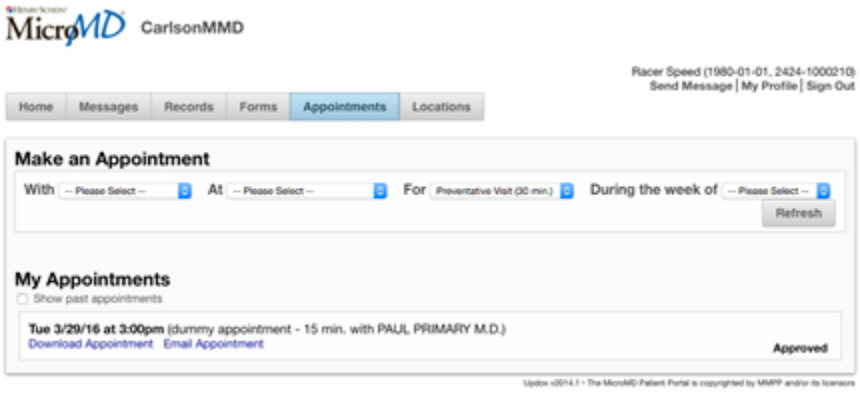

Connor Macleod (1970-01-01, Test999)
Send Message | My Profile | Pay Statement Online | Sign Out
Home
Messages
Records
Forms
Appointments
Available Forms
Patient Health Information
— Not Submitted
Demographics
Problems
Allergies
Medications
Immunizations
Vital Signs
Family History
Social History
Procedures/Surgeries
Social History
Add New Social History
Social History 1
Description
Effective Date
Comment
Comments
Expand
Save Data
Submit Form



MicroMD Patient Portal Appointments

Location: Patient Portal

The MicroMD Patient Portal enables patients to request an appointments by location.



To request an appointment:

1. In the **With** field, select the provider.
2. In the **At** field, select the location.
3. In the **For** field, select the service.
4. In the **During the week of** field, select a time period
5. In the list of available appointment times, select a date/time.
6. Click **Request**.

MicroMD Patient Portal Payments

Location: Patient Portal

The MicroMD Patient Portal enables patients to make online payments for their account.

To make a payment

1. In the Patient Portal, click the **Pay Statement Online** link.
2. The patient will be redirected to MicroMD's payment processing application.

e-MDs Practice Partner

This section contains articles specific to e-MDs Practice Partner.

Compose - Send to EHR

Location: Workspace

One of the options available in **Compose** is the ability to send the item (and attachments) to a patient's chart in the EHR as a PDF document.

1. Click **Compose**.
2. **Search** - enter the patient's name then select the patient from the result list.
3. **Send to EHR** - select this checkbox to send the item to the patient's chart, then click OK.
4. **Ordered by Outside Provider** - check the box if the item was ordered by a provider outside of your practice.
5. **Ordering Provider** - if the item was ordered by a provider within the practice, select the provider's name.
6. **CC** - to send a copy of this item to another provider, select the provider's name.
7. **Section** - select a section in the patient's chart to store the item.
8. **Title** - enter a title for the item.
9. **Date of Item** - defaults to current date but you may change if needed.
10. **Time** - defaults to the current time but you may change if needed.
11. **Notes** - enter additional information as needed.
12. **Include attachments** - if you want to attach one or more documents:
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - If you want to rearrange the documents, click on the document then drag it to another position in the attachment list.
4. Click **SEND**.

Send to EHR

Location: Workspace

The **Send To** feature lets you send items to the EHR. For Konica Minolta users, the Category field has been renamed to Study. The Studies are automatically synced between Updox and Konica Minolta.

1. In the Workspace, click on the **>** to expand the item.
2. Click **SEND TO**.
3. In the **Search** box enter the patient's name.
    - Select the patient.
    - Click **Send to EHR**.
    - Click **OK**.
4. Enter a **Subject**.
5. Select a **Study.**
6. Enter **Date of item**.
7. If you want to sign off on the document, check **Sign off as me**.
8. Enter **Notes** (optional).
9. If you want to attach one or more documents, check **Include attachments**.
    - At the bottom of the page click the **+** sign to add attachments.
    - Navigate to the document location then double click the document to attach.
    - Repeat for each document you want to include.
    - If you want to rearrange the documents, click on the document then drag it to another position in the attachment list.
12. Click **SEND**.

Appendix

Glossary

Address Book	Practice-wide collection of communication information for contacts, patients, and users.
Archive	Folder containing items that have been archived. Typically an item is archived once it has been addressed.
Audit Trail	History of actions that have occurred to an item.
Auto Zoom	Magnification by rolling the cursor across an item.
Broadcast Message	Message sent by a practice user to all patients with a portal account.
Category	Collection of documents that corresponds with the same concept in the EHR software (e.g. Lab Reports, Doctor's Notes).
Compose	Function that creates a message to send to a contact, patient, or user.
Contact	Someone other than a patient or user to send/receive items to/from.
Direct Messaging	Electronic communication method, similar to email but more secure, used to send/receive patient protected health information (PHI).
DirectTrust	Non-profit health care industry alliance that establishes and maintains rules, standards, and policies associated with the operation of the security and trust-in-identity layer for Direct exchange.
DirectTrust Activation	Process to enable participation in the DirectTrust Direct messaging network that involves identity verification of a practice representative or each user.
Family Access	Process that enables others to have access to a patient's portal account.
Fax	Method to transmit electronic information over the telephone network.
Fax Coversheet	First page sent with a fax that indicates the sender, receiver, and additional information as defined.
Filter	Process to narrow a list down to a smaller subset that is more applicable to the need.
Form	Data entry screen that a practice can create on the Patient Portal to collect information from a patient.
Inbox	Folding containing incoming items.
Item	Fax, document, email, secure message, direct message, portal message
Item Type	Label that classifies an item (fax, email, file, etc.).

Patient Portal	Web application that patients use to access select information from their electronic health record.
Plugin	Enables the syncing of patient information for select EHRs.
Queue	Method to organize items in the Inbox, similar to file folders.
Reply	Process to respond to an item received from a sender.
Secure Message	Message sent between users at the same practice or a message sent between a user and a patient using the Patient Portal.
Send To	Function that sends an item to another user, patient, contact, or to a patient's chart in the EHR system.
Sent	Folder containing items that have been sent to a recipient.
Signature	Function to place your signature on a document.
Sort	Process to sequence items in a specific order (date, from, subject, etc.).
Space	There are two spaces: practice and personal. Items are in one or the other.
Spam	Folder containing items flagged as Spam.
Tag	Colorful way to organize items in the Inbox.
Trash	Folder containing items that have been deleted.
Updox Central	Optional application that enables the automatic upload of documents/faxes from a centralized folder and use of a virtual printer to upload documents.
User	A person at the practice who has access to the application.
Virtual Printer	Method to upload documents from a computer to the application by printing to a virtual printer.
Workspace	Area of the application screen that lists the items.

Release Notes

2019 Enhancement Release Notes

March 1, 2019

Ability to name downloaded PDF and TIFF files - Added the ability to name downloaded PDF and TIFF files

2018 Enhancement Release Notes

November 16, 2018

- **Fax Confirmation Page** - added fax confirmation page functionality

September 7, 2018

- **Print Audit Trail** - ability to print the audit trail has been added

July 27, 2018

- **File Upload** - a standard csv file upload format has been added for office locations

May 22, 2018

- **View/Print BAA** - a new function is available on the Tools menu to view/print the Business Associate Agreement
- **File Upload** - the screen has been redesigned and standard csv templates added to upload patients, contacts, Blast patient list, and appointments
- **File Upload** - the format of the standard patient csv file upload has been modified
- **File Upload** - the format of the standard appointment csv file upload has been modified
- **File Upload** - a standard csv file upload format has been added for address book contacts
- **File Upload** - a standard csv file upload format has been added for Blast

May 4, 2018

- **Blast** - several of the predefined lists can now be automatically repeated on a weekly basis
- **Blast Manage Lists** - non-numeric characters will be automatically deleted if entered in the **Age** filter
- **Practice Information** - new fields have been added to identify the practice National Provider ID (NPI) and the practice specialty
- **My Signature** - you can now upload your signature via a PDF file
- **Mark as Spam** - if the item you're sending to the Spam folder is a fax, you can optionally add the fax number to the **Block List** at the same time

April 25, 2018

- **Supported Browsers, Devices, OS** - updated list of supported web browsers, mobile devices, and operating systems

April 20, 2018

- **Direct Address Directory** - when searching the directory in the Address Book the results are now sorted by last name and first name
- **Address Book** - for Pharmacy practices the Address Book Category field now includes an option for "Prescriber"
- **Send a Fax** - when sending a fax the confirmation notification now includes the number of pages faxed
- **Spam** - the **Delete all SPAM messages now** link has been removed (now that we have a **Delete All** button)
- **Reminder Scripts** - the appointment time field is no longer required in your reminder scripts (the library scripts will still include the time field)
- **Reminder Scripts** - a new variable is available to include the location address in the reminder for your email and phone scripts
- **Move to Inbox** - the **Move to Inbox** button will no longer be present when you're already in the Inbox folder
- **Archive** - the **Archive** button will no longer be present when you're already in the Archive folder

April 6, 2018

- **Users** - the values in the Specialty Classification and Specialization fields are now listed in alphabetical order
- **Tags** - you now have up to 49 tags to organize your Inbox items
- **Item Management** - the **Delete All** function in the Trash folder now waits till 11:30pm to start the process
- **Text Message** - the recipient's responses and your replies now append to the original text message until 24 hrs of inactivity

March 23, 2018

- **Text Message** - (applicable to sites using Locations) - a Send From field has been added to specify the sending location
- **Text Message** - when a text message is received the First Name, Last Name, and Business Name from the Address Book will display

March 9, 2018

- **Blast** - removed the following field when sending a Blast message **Message Contains Educational Resources**
- **Password Reset** - users are now directed to the Login screen after resetting their password
- **Workspace Tool Bar** - the Workspace Tool Bar buttons presented will vary based on what is selected (items, pages within items, both)

February 23, 2018

- **Scheduling** - in the Patient Self-Scheduling configuration you can now allow patient to schedule an immediate appointment
- **Reminder Scripts** - the library scripts have been renamed to be more descriptive

February 9, 2018

- **Internal Forms** - new button has been added to let you optionally print a copy of the form

January 31, 2018

- **Virtual Printer** - updated the instructions for setting up an Updox Virtual Printer on a Mac OSX device

January 26, 2018

- **Queues** - Users assigned to Queues are now listed in alphabetical order by last name

January 12, 2018

- **Resend Fax** - now supports resending previously failed faxes
- **Text Message** - new feature available for select EHR products that lets you send a text message from the Inbox

2017 Enhancement Release Notes

November 28, 2017

- **Faxing** - A new feature in User Management lets you specify a user's default fax coversheet.
- **Form Management** - This feature has been expanded to create and send internal practice forms (previously forms were specific to the Patient Portal).
- **Internal Forms** - This new feature lets the practice send previously defined forms (blank or completed) via Message Compose.
- **Blast Messages** - For Pharmacy Connect the message length has been increased to 280 characters.
- **Blast Messages** - Blast messages with custom templates can now be set to automatically repeat (previously limited to the system templates).
- **Edit Attachment** - A new tool has been added to let you add a signature and date/time with one click when editing an attachment.
- **Delete All** - The Spam and Trash folders have a new button that lets you delete all messages at once.
- **User Management** - A search box has been added to let you quickly find a user to view/update.
- **Practice Fusion** - When the Payments module is added to a practice, all users are automatically enabled to bill credit cards and view billing reports.

November 10, 2017

- **Faxing** - A new feature has been added to fax items in the Sent folder to let you resend the same fax to the same recipient.
- **Tags** - You can now define up to 39 tags to organize your folder items!

October 27, 2017

- **Reminder Rules** - Active/Inactive labels have been added to clarify the status of each reminder rule. Rule settings are now saved without needing to turn on the rule.
- **Patient Portal Birthdate Validation** - Users are required to enter their birthdate during the login process if their name and/or birthdate has changed since the last sync.
- **Patient Portal Birthdate Validation** - A patient's portal account will be locked after five attempts to enter a matching birthdate.
- **Login Screen** - Informational information has been added to the left side of the login screen.
- **Fax Coversheet** - The name of the fax coversheet must be unique before it can be saved.

October 13, 2017

- **Billing Information** - Updated the look of the screen for entering your credit card information and added the "I'm not a robot" field.
- **Patient Payments** - Updated the look of the screen for entering your credit card information and added the "I'm not a robot" field.
- **Log In** - Updated the look of the log in screen.
- **Forgot Password** - Updated the look of the Forgot Password screen.
- **DirectTrust Activation** - Temporarily removed the credit card option in the Financial/Utility ID section.

October 3, 2017

- **View Record** - The View Record feature (in messages with a CCD attached) has been enhanced to expand/collapse sections and customize viewing preferences (if enabled by your EHR vendor).
- **Import to EHR** - When an incoming Direct message has a CCD attached along with other files (e.g. .pdf, .txt), those additional files can also be imported into the EHR (if supported by the EHR vendor).
- **DirectTrust Activation** - Added a message to the screen regarding credit card freezes.

August 18, 2017

- **Updox Web Application User Interface** - When the window size is decreased, the Button Bar items are shrunk to show the icon. The text label is visible upon cursor rollover.

June 9, 2017

- **View Messages from Patient Portal** - If an image file is received via a Patient Portal message, the image will display as a thumbnail if the file extension is BMP, SVG, JPG, PNG, or GIF. All other file extensions will be presented as downloadable links.

April 12, 2017

- **Patient Portal Measure Reporting** - This function has been updated to include the Meaningful Use (MU) Stage 3 and MACRA Advancing Care Information (ACI) incentive programs. Note: this function is not applicable to practices using an EHR system that is integrated with Updox (since the measure reporting resides in the EHR instead).

April 28, 2017

- **Konica Minolta** - The Send to EHR feature in Compose has been customized for the Konica Minolta software

April 18, 2017

- **e-MDs Practice Partner** - The Send to EHR feature in Compose has been customized for the e-MDs Practice Partner EHR software

March 17, 2017

- **Patient Portal** - The Patient History Audit Log now captures additions, changes, and deletes made on the Family Access screen
- **Reminders** - A new EHR-level setting is available to send separate reminders via text message when there are multiple appointments on the same day that are being sent to the same telephone number. Contact customer support to turn on this feature.

March 3, 2017

- **Patient Portal** - Patients now have the option to transmit a CCD by Direct messaging or email (new)
- **Patient Portal** - The 'Display Audit Trail' link on the Records tab has been removed (the **Patient Portal Patient History Audit Log** replaces that function)

2016 Enhancement Release Notes

December 16, 2016

- **User and Patient Audit History** - this new viewer shows a history of actions related to patients and to Updox user accounts
- **Patient Portal Patient History Audit Log** - this new viewer shows a history of actions that occurred in the Patient Portal
- **Send Pages** - when selecting multiple pages from multiple items to send out, the order of those pages has been updated to group by item then by the date the item was received

November 18, 2016

- **Move to Inbox** - the new Move to Inbox feature lets you move items in the Archive and Delete folders back to the Inbox
- **Users** - users are now listed alphabetically in the user management folder (users with admin privileges are listed first)
- **Practice Settings** - a new practice-wide setting lets you change the format of downloaded files to TIFF instead of PDF
- **Blast** - when sending a Blast message to a pre-defined list an option there's a new option to automatically repeat that message on a scheduled basis (weekly or monthly)
- **Blast Configuration** - the new Schedules tab lists the Blast messages set to repeat and lets you cancel the schedule

November 4, 2016

- **Blast** - when sending messages to the Patient Portal you can indicate if the message contains educational resources
- **Reminders** - configuration option added to prevent reminders from being sent by an alternate method when a patient's contact information for their preferred method is missing

October 28, 2016

- **Printing to Queues** - added a Help article for Printing to Queues

October 21, 2016

- **Upload/Print** - a new option in Profile Settings let you upload/print documents directly to a selected Queue
- **DirectTrust Activation** - the Direct messaging identity verification process can now be completed from a mobile device (e.g. cell phone)

October 14, 2016

- **Blast** - a new add-on product is available that lets you send messages to multiple people at once by email, phone, text, or Patient Portal

October 7, 2016

- **State Fields** - all State fields now include the US Territories
- **Compose** - when composing a message, the 'Send as Practice checkbox now remembers your last choice (reducing your number of clicks throughout the day)
- **Printer User Mapping** - when using a virtual printer to send documents into the Inbox you can now direct a user's documents to a Queue
- **Intergy** - when sending documents to the EHR users now have the option to assign a task to a provider

September 23, 2016

- **Forgot Password** - the process has been revised to send an email with a link to the reset password screen

September 13, 2016

- **File Updoad** - a patient suffix field has been added to the patient file upload

August 26, 2016

- **Inactivity Logoff** - a warning message will display 5 minutes before you are automatically logged out due to inactivity

- **Text Messaging Scripts** - the Yes/No functionality to confirm/cancel an appointment is now automatically added so you don't need to specify this info in the test message script

August 12, 2016

- **MicroMD** - when deactivating a location a message displays reminding you to remove the location designation from any users or patients assigned to that location
- **Mohegan** - when deactivating a department a message displays reminding you to remove the department designation from any users or patients assigned to that department

July 7, 2016

- **Reminders** - a new reminders setting enables a practice to remove the "Press 3 to call the office" feature in voice reminders
- **Greenway Primesuite** - when importing into the Primesuite EHR, the import default is now "Patient Chart" instead of "Document import"

June 17, 2016

- **Reminders** - reminders sent by phone will say the message twice to ensure the person hears the complete message
- **Reminders** - reminders sent by email now include the standard blurb for auto-generated emails "do not reply to this email"
- **Patient Portal** - the subject in the Patient Portal invitation email has been changed to: New Portal Account with [name of the practice]
- **System Folder Management** - Changed category "Portal item unread" to "Portal item read"

May 20, 2016

- **Reminder Rules** - a new setting lets you choose the language/gender for human voice reminders

May 10, 2016

- **Practice Setting** - a new practice setting lets you control the number of minutes of inactivity before a user is automatically logged out

April 22, 2016

- **Faxing** - added the ability to send a fax to a patient
- **Patient Portal Forms** - added the ability to delete a Patient Portal form
- **Patient Portal** - in information messages the term "practice" has been replaced with the name of the organization as defined in Admin > Patient Portal > Name Displayed
- **Mohegan** - in Admin > Forms renamed the label "locations" to "departments"

April 12, 2016

- This release contains behind the scenes work to support some exciting new features coming soon.

March 29, 2016

- **Credit Card Expiration Email** - the email notifying you when your credit card is about to expire has been updated
- **Credit Card Expired Alert** - a new message has been added to the login screen when the account holder's credit card has expired
- **Reactivate Accounts with Expired Credit Card** - you can now reactivate your account without calling Support when your account has closed due to an expired credit card
- **Passwords** - to protect your account, if you haven't logged in for over a year your password will automatically be reset (you can reset to one you know by clicking Forgot Password)
- **MicroMD** - a custom function has been added to the MicroMD implementation to define multiple practice locations

- **MicroMD** - the Manage Forms function has been customized to enable a Patient Portal form to be limited to specific locations
- **MicroMD** - the Patient Broadcast function has been customized to send messages to patients by location
- **MicroMD** - a custom function has been added to the MicroMD implementation to specify the URL to a payment processing application
- **MicroMD Patient Portal** - custom forms have been added to the Patient Portal to enable patients to enter information corresponding to select sections of a Continuity of Care Document Summary (CCD)
- **MicroMD Patient Portal** - a custom Appointments screen has been added to the Patient Portal to enable patients to request an appointment by location
- **MicroMD Patient Portal** - a custom link has been added to the Patient Portal to enable patients to make payments on their account

March 15, 2016

- **Greenway Compose** - users can now search the Direct Address Directory when composing a Direct message in the Greenway Compose function
- **Updox Mobile** - the new **Contact Groups** feature in the Address Book is now also available in Updox Mobile

March 4, 2016

- **Address Book** - a new feature lets you create Contact Groups which can be used to send faxes to multiple people at once
- **Send a Fax** - the ability to send faxes to a Contact Group has been added
- **Fax Coversheet** - a new field has been added to designate your custom fax coversheet as the default
- **Passwords** - to protect your account there is a maximum of 10 failed login attempts before your account is temporarily locked; to prevent you from maxing out too soon we count multiple failed attempts of the same incorrect username and password as one attempt

February 12, 2016

- **Editor** - the Editor has been updated to enable users to place the cursor in a specific spot when re-editing text using the Alt key
- **Editor** - the Editor has been updated to enable highlight text during insertion using the Shift key
- **Direct Message Fail Notifications** - the recipient's address has been added to the message subject line
- **Intergy** - added the ability to send TIFF files to a patient's EHR chart
- **Practice Fusion Payments** - patient payment information is obtained from the Practice Fusion EHR if that patient doesn't currently exist in Updox
- **Patient Portal Invitations** - a new setting lets you automatically resend Patient Portal invitations to non-participating patients every 30, 60, or 90 days
- **Reminder Scripts** - the Reminder Templates have been renamed to Reminder Scripts
- **Reminder Scripts** - the Reminder Voice Script definition has been separated into two options: **Human Voice Script** and **Computer Voice Script**
- **Reminder Scripts** - several new pre-defined Human Voice and Computer Voice reminder scripts have been added
- **Mohegan** - added customizations to Secure Messaging and the Patient Portal for the Mohegan implementation

February 2, 2016

- **Editor** - the Editor has been updated to enable highlighting to be added over new annotations without saving the document first
- **Compose** - the Compose window now displays a business name, if applicable, when searching for a contact
- **Reminders Email Template** - a preview button has been added to the email template definition

- **Reminders Voice Template** - the ability to define your own voice reminder templates has been added
- **Reminders Text Template** - the ability to define your own text message reminder templates has been added
- **Reminders Appt Type** - specifying the reminder templates to use has been moved from Reminder Rules to Scheduling Appt Types so that you have more flexibility over when to use each template
- **Reminders Location** - the ability to define locations for appointment reminders has been added (availability depending on EHR implementation with Updox)
- **Reminders Language** - a new field has been added to the Address Book to specify a patient's language preference for reminders
- **Documentation** - the Table of Contents in this documentation in now in alphabetical order

January 12, 2016

- **Password Requirements** - to help keep your data secure your passwords need to meet minimum complexity requirements; if a user's password isn't secure enough they will be prompted to change it
- **Address Book** - two new fields were added to the Address Book for Prefix and Suffix
- **System Folder Management** - new function that lets you redirect system-generated messages to the System folder instead of the Inbox folder
- **Download PDF** - a Download PDF button has been added to the menu bar to enable you to include multiple items and/or multiple attachments in a single PDF file
- **Print/Upload to Compose Window** - when printing or uploading documents to Updox you can set your **Profile setting** to automatically open the Compose window so you can immediately transmit the document
- **MU Measures Reporting** - the Secure messaging measure calculation varies depending if the reporting year is before 2015, 2015, or after 2015
- **MU Measures Reporting** - beginning in 2015 the start and end date in the reporting period range must be in the same calendar year (since some calculations vary depending on the year)

2015 Enhancement Release Notes

December 18, 2015

- **Payments Transaction Report** - the credit card type is now shown on the Payments Transaction Report
- **Reminders** - a configuration setting has been added to set you to continue sending reminders even after the patient has confirmed
- **Electronic Signature** - when adding your electronic signature to a document (attachment editing) the informational line font size is now larger
- **Buttons** - the color scheme on buttons has been changed to blue/gray
- **Patient/Contact Searches** - improved the patient and contact search processes regarding first and last names

December 4, 2015

- **Refer & Share** - this new feature lets you invite other practices to use the Updox Secure Messaging application for free
- **Folders** - when you move between folders the application now remembers which page you were last on in each folder
- **Patient Portal Opt Out** - a new button in the Address Book lets you opt a patient out of receiving secure messages and healthcare records in the Patient Portal
- **Fax Coversheet** - you can now add multiple fax coversheets and then select the one you want to use when **sending a fax**

November 24, 2015

- **Practice Settings** - the "Keep items..." settings will enable you to automatically move items from the Sent folder to the Archive folder to the Trash folder
- **Fax Coversheet** - new tools have been added to format your fax coversheet
- **Patient Portal Settings** - a new setting lets you select which users a patient may send secure messages to
- **Patient Portal Settings** - a new setting lets you control if patients can send messages to multiple recipients
- **Patient Portal Settings** - a new button lets you see a Preview of the Patient Portal based on your configuration settings
- **Reminders Dashboard** - a new button lets you print the reminders
- **System Folder** - a new folder has been added for the non-vital system notification messages (these message will no longer show in the Inbox folder)
- **Analytics** - a new button lets you download a spreadsheet of patient information from the Tools > Analytics function
- **Address Book** - Patient Appointments - a new click in the Address Book > Patient Portal > Appointments tab lets you quickly view/change a patient appointment

November 6, 2015

- **Compose** - the attachment frame in the Compose window has been updated to handle non-standard object shapes
- **Faxing** - great news for those one time faxes - you can now send a fax to a new number without creating a contact by using the "Quick send to" feature
- **Spam** - there's a new feature in the Spam folder that lets you delete all the Spam messages with one click
- **Tags** - in the Inbox Workspace you can now display the tag name by hovering your cursor over the tag
- **Tags** - you can now close the tag picker bar without selecting a tag
- **Fax Coversheet** - the time zone has been added to the current date on the fax coversheet
- **Appointment Calendar Blackout Dates** - you can now block out dates on your calendar to prevent appointments from being scheduled on those dates (e.g. vacation)
- **Patient Payments Transaction Report** - you can now select a date range for the transaction report in addition to a single date
- **Inviting Patients to the Portal** - in the Address Book, on the Patient Portal tab there's a new Re-Invite button that lets you resend the email inviting the patient to the portal
- **Attachment Editor** - you can now use your computer's Copy & Paste functionality when adding a rectangle to the document you're editing

October 30, 2015

- **Compose** - we changed a few of the labels to better fit the communication method you select (e.g. "Message" instead of "Notes")
- **Compose** - when adding **additional recipients** the communication methods are now listed as buttons instead of a list of check boxes
- **Compose** - new colors for the Send and Discard buttons
- **Compose** - the “Include History” checkbox will now only appear when there is History to include
- **Compose** - the “Set EHR user ID” warning message has been removed for all communication methods except for “Send to EHR”
- **Fax Coversheet** - the current date is automatically added to the Fax Coversheet
- **Fax Contact** - a new icon in an incoming fax lets you quickly add the contact to your Address Book
- **Print Schedule** - a new function to print appointment schedules
- **Payment Notifications** - an Inbox notification is now sent if a payment fails
- **Search** - a search can also be initiated by clicking the magnifying glass icon
- **Workspace** - increased the size of the date in the Workspace

October 23, 2015

- **Compose** - the Compose window now shows the names of all recipients when sending a fax to more

than one
- **Print** - when printing documents from the Inbox the extra pages have been removed
- **Categories** - you can now specify a default category when importing items into the EHR
- **Users** - changes to users now take affect immediately (the user no longer needs to log out then back in)
- **Attachment Editor** - a Print button has been added to the Editor tool bar so you can print without exiting
- **Attachment Editor** - when signing a document the signature image is now smaller to enable better placement on the document

October 16, 2015

- **Refresh** - a Refresh button has been added to the tool bar so you can now refresh the screen directly within the application instead of using your browser's refresh functionality
- **Home Page** - to streamline the look of items in the workspace the columns have been rearranged: 1) Item Type, 2) Date/Time, 3) Subject, and 4) Sender
- **Drag and Drop** - when you drag and drop files into the Inbox the screen now automatically refreshes
- **Drag and Drop** - the progress bar now automatically closes when the upload is complete
- **Compose** - the entire Compose window now displays without having to scroll when you're using a small monitor with low resolution
- **Compose** - the attachment area now shows more pages per row to reduce the need to scroll
- **Faxing** - to reduce the number of keystrokes to send a fax the application now remembers your last settings (e.g. send coversheet, send as practice, etc.)
- **Direct Messaging** - incoming Direct messages now display the healthcare category (covered entity, business associate, or patient) of the sender to further identify the source of the message

October 9, 2015

- **Reminders** - when a patient has multiple appointments in a short time period (e.g. same day) they may not want to receive a reminder for each appointment; a new setting in Reminder Rules lets you send a single reminder for those multiple appointments in the selected time frame (1 hr, 2 hrs, 4 hrs, or same day)
- **Reminders** - you can now control patient appointment reminders on a calendar-by-calendar basis with the new setting in **Scheduling > Calendars**
- **Reminders** - you can now control patient appointment reminders by appointment type with the new setting in **Scheduling > Appt. Types**
- **Patient Portal** - patients can now add attachments to the messages they send to the practice

September 25, 2015

- **Reminders** - changes to reminder rules are now automatically applied to existing reminders instead of asking if you want to (saves a click!)
- **Attachment Editor** - the editor tool bar now follows as you scroll down the page
- **Compose Quick Edit** - when adding a contact on the Compose screen you can now also optionally enter the email/Direct address and fax number.

September 22, 2015

- **Attachment Editor** - the attachment editor has been updated with a new look and new tools
- **Direct Message Compose** - a banner message displays to let you know the level to which the recipient's identity has been verified by a registered authority (e.g. credit bureau)
- **User Management** - the list of users is now organized by active then inactive users
- **Folders** - messages in the Sent folder now display the name of the recipient

September 4, 2015

- **Keyboard Shortcuts** - added ability to use keyboard shortcuts in the Web App
- **Send to EHR** - added ability to select 'None' in the Notify doctor field

August 27, 2015

- **Address Book** - added ability to delete a contact
- **Address Book** - the Address Book search now waits for you to begin typing instead of listing all patients, users, and contacts
- **Search** - the Inbox, Sent, and Archive folders are now pre-selected in the Search
- **Patient Portal** - added ability to insert a hyperlink in the About Us field of the Patient Portal admin settings
- **Send to EHR** - added ability to search for a category or doctor if there are more than 10 in the list
- **Multi-Select** - added ability to select a range of items by holding down the <Shift> key and clicking the check boxes

August 14, 2015

- **Greenway Intergy** - added a custom Send to EHR for Greenway Intergy
- **Reminders** - the Reminders and Scheduling time zone settings are kept in sync when changes are made in either place

August 7, 2015

- **Reminders** - added ability to use your practice number as the caller ID for telephone and text reminders
- **Reminders** - if you've purchased Reminders you can now Scheduling settings (in Admin) for additional Reminder configuration options (control patient notifications, change a provider's name used in reminders)

July 28, 2015

- **The Blocklist** - new feature that lets you enter fax numbers to block; incoming faxes from those numbers will automatically route directly to the Spam folder

July 17, 2015

- **DirectTrust Activation** - user agreements revised

July 8, 2015

- **Reminders** - new setting that lets you remove the appointment cancel feature in reminders
- **Reminders** - telephone reminder message now plays twice within the call
- **Inbox** - when logging into the Inbox (or refreshing) items now automatically expanded or collapsed based on how you last left them (it remembers!)

June 19, 2015

- **Reminders** - new setting to let you define the start and end times for the blackout period

June 12, 2015

- **Tags** - increased the number of available tags to 20
- **Spam** - new feature to send an email or fax to the Spam folder
- **MU Measures Reporting** - new feature to report the raw numerators for the Patient Portal related Meaningful Use measures. Note: providers using an EHR integrated with Updox will still use the MU Reporting within their EHR.

April 24, 2015

- **Analytics** - new screen design
- **Patient Broadcast** - new screen design
- **Patient Payments** - now available when using Family Access in the patient portal

- **Performance** - improved speed to log in and present screens
- **Practice Settings** - new setting to define the practice timezone
- **Reminders** - new setting to block reminders on weekends
- **Scheduling** - appointment conflict messages now have more information
- **Usage Information** - new screen design

April 3, 2015

- **Reminders** - new add-on feature available to send appointment reminders
- **File Upload** - new feature to upload patient and appointment information files for reminders