



## Refer & Share

Updox Refer & Share allows you to invite your colleagues/business partners to use Updox secure messaging FREE of charge.

### Benefits of Refer & Share

- **Secure** - HIPAA-compliant secure messaging
- **Web-based** - Accessible anywhere via the internet
- **Cost Effective** - Absolutely NO charge to send or receive documents
- **High Quality** - Crystal-clear documents are far superior to faxes
- **Auditable** - See when a document was viewed or easily label, organize and search for documents sent or received in the past
- **Edit and Sign** - Easily markup and/or sign documents without printing
- **Two-way** - Drag and drop your own documents into Updox to send to any other Updox user in our network
- **Unlimited** - Unlimited users, messages, uploads and referrals to all subscribers

### How it Works

1. You send an invitation to someone from another organization.  
*All you need to provide is their name and their email address or fax number. Updox will automatically include your information and an Invitation Code in the fax/email.*
2. The person you invited enters the Invitation Code to accept your invitation.  
*If the person you are inviting is not yet a member, they can create a FREE account to communicate securely with you and other organizations.*
3. Your organizations are now connected – you can stop faxing or mailing each other!  
*Once your invitation has been accepted, your organization can selectively share records, secure messages, and exchange CCR/CCDs. The organizations you invite are completely separate Updox accounts and can only see the information that you explicitly send to them.*
4. Visit the organization's Updox profile screen within the Updox Address Book to add/remove specific members of the organization.



## How to Send a Refer & Share Invitation

1. Log into Updox: <http://myupdox.com/updox-ui/>.
2. Click “MENU” in the top left corner.
3. Under the Home section of the menu, click “Refer & Share”.
4. Click “SEND INVITATION”.

**Exchange Health Information quickly & easily using Updox!** ✕

**Here's how it works:**

- 1 You send an invitation to someone from another practice.**  
All you need to provide is their name and their email address or fax number. Updox will automatically include your information and an Invitation Code in the fax/email.
- 2 The person you invited enters the Invitation Code to accept your invitation.**  
If the person you are inviting is not yet a member, they can create a FREE account to communicate securely with you and other practices. Of course, they can upgrade their account to include faxing, EHR integration, and their own patient portal.
- 3 Your practices are now connected – you can stop faxing each other!**  
Once your invitation has been accepted, your practices can selectively share records, secure messages, and exchange CCR/CCDs. The practices you invite are completely separate Updox accounts, and can only see the information that you explicitly send to them.  
  
Secure messages are faster, higher-quality, auditable, and more easily saved/imported to EHRs or other systems.
- 4 Visit the practice's Updox profile screen to add/remove specific members of the practice**

**+ SEND INVITATION** **ACCEPT INVITATION** ✓

5. Enter the Name of the contact you'd like to invite.
6. Enter an email address or fax number of the contact.
7. Click “SEND INVITATION”

Send Invitation

Send fewer faxes; invite your colleagues/business partners to use Updox secure messaging FREE of charge!

- **Secure** - HIPAA-compliant secure messaging
- **Cost Effective** - Absolutely NO charge to send or receive documents
- **High Quality** - Crystal-clear documents are far superior to faxes
- **Auditable** - See when a document has been viewed
- **All Electronic** - PDF documents are ready to save to your/others' systems

<b>Name</b> FirstName LastName	<b>Email Address or Fax Number</b> email@email.com
-----------------------------------	---

Your message (optional)

**HOW IT WORKS:** We will send an email or fax to the contact you have entered. Your name, practice name, and practice phone number will be automatically included in the invitation email/fax. The recipient can then create an account (if necessary) and accept your invitation. You can send an unlimited number of invitations; the invitation fax or email does not count toward your usage.

NOTE: You can send an unlimited number of invitations.



## How to Accept a Refer & Share Invitation

1. In an email invitation, click the provided link.  
In a fax invitation, locate the web address, then enter the URL in your web browser.
2. A web page then displays with multiple options:

**I would like to create a FREE Updox account, and have an NPI**

Updox can expedite your registration by pre-filling most of the information we need for the next step.

[Sign up with an NPI](#)

**I would like to create a FREE Updox account, and don't have an NPI**

We will prompt you for everything we need in the next step.

[Sign up without an NPI](#)

**I would like to start a full-account**

Includes inbound/outbound faxing, your own patient portal, optional appointment scheduling, optional online billing/payments, and more. \*\* A valid credit card is required.

[Start full-account](#)

**I already have (or my organization already has) an account:**

[Log on to Updox](#)

**I would like to learn a little bit more about Updox before I continue**

[Visit Updox.com](#) (link will open in a new page)

- a. To open a new Updox account choose one of the following options:
  - i. Sign up with an NPI
  - ii. Sign up without an NPI
  - iii. Start a full-account
- b. If an Updox account already exists, click Log on to Updox, then enter the user ID and password.
- c. For more information about Updox, click Visit Updox.com.

### New Updox Account:

1. When opening a new account, complete the following information on the registration page that displays:



**Account Holder (You!)**

First Name \*

Last Name \*

User Id (email) \*

We will email your initial password to the above email address.

Invitation Code

If you have been invited to join Updox by another practice, entering the code sent in the invitation you received will connect your practice account with the invitor's practice. This allows you to securely exchange records and enables you to stop faxing each other.

**Organization (Practice / Group / Company / Individual)**

Name \*

Address \*

City \*

State \*

Zip \*

Fax #

Phone \*

Our EHR \*

If you don't use an EHR, you can just put "n/a" or "none" in this field.

- a. First Name
  - b. Last Name
  - c. User ID (email)
  - d. Invitation Code (from the email or fax)
  - e. Organization Name
  - f. Address
  - g. City
  - h. State
  - i. Zip
  - j. Fax # (optional)
  - k. Phone
  - l. Our EHR (enter n/a if you don't use an EHR)
2. Click "Finish".
  3. An email is sent to the address entered in the User ID field with the log in instructions. Log into Updox using the User ID and temporary password from the email.
  4. Change your temporary password by going to MENU > Tools > Change Password.



### Existing Updox Account:

1. Log into Updox: <http://myupdox.com/updox-ui/>.
2. Click “MENU” in the top left corner.
3. Under the Home section of the menu, click “Refer & Share”.
4. Click “ACCEPT INVITATION”.

**Exchange Health Information quickly & easily using Updox!** ✕

**Here's how it works:**

- 1 You send an invitation to someone from another practice.**  
All you need to provide is their name and their email address or fax number. Updox will automatically include your information and an Invitation Code in the fax/email.
- 2 The person you invited enters the Invitation Code to accept your invitation.**  
If the person you are inviting is not yet a member, they can create a FREE account to communicate securely with you and other practices. Of course, they can upgrade their account to include faxing, EHR integration, and their own patient portal.
- 3 Your practices are now connected – you can stop faxing each other!**  
Once your invitation has been accepted, your practices can selectively share records, secure messages, and exchange CCR/CCDs. The practices you invite are completely separate Updox accounts, and can only see the information that you explicitly send to them.  
  
Secure messages are faster, higher-quality, auditable, and more easily saved/imported to EHRs or other systems.
- 4 Visit the practice's Updox profile screen to add/remove specific members of the practice**

**+** **SEND INVITATION** **ACCEPT INVITATION** ✓

5. Enter the invitation code.
6. Click “ACCEPT”.

**Please enter the invitation code on the fax or email you received** ✕

After entering this code:

- The inviter's practice will be added to your practice's address book
- Your practice will be added to the inviter's address book

Invitation Code

Invitation Code

**CLOSE** **ACCEPT** ✓



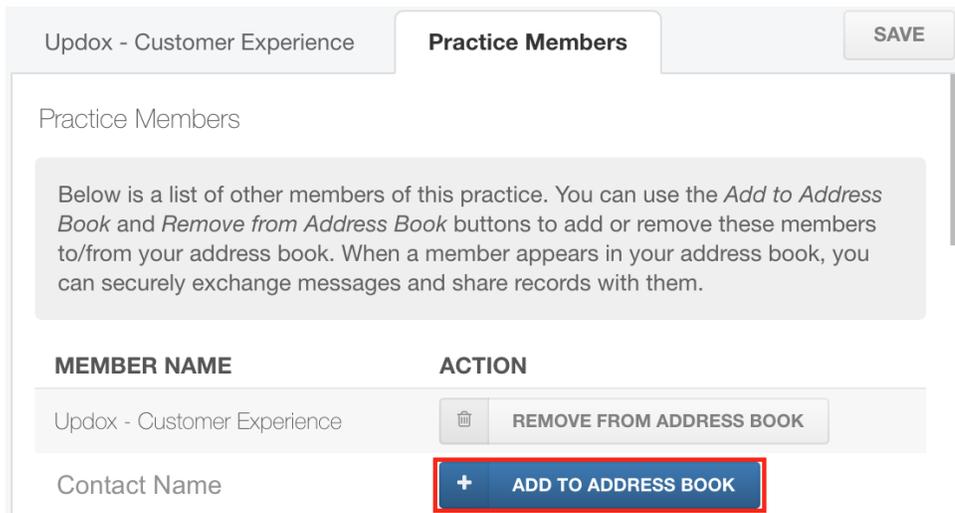
After entering this code:

- The inviter's organization will be added to your organization's address book.
- Your organization will be added to the inviter's address book.

## Add Members to Your Address Book

Although each organization will now be listed in the address book of the other organization, if you'd like to securely message specific members of the organization or a specific queue, add them to your address book to begin secure messaging that member or queue.

1. Go to the [Address Book](#).
2. Search for the name of that contact/organization.
3. Select the contact/organization from the search results.
4. Click on the "Practice Members" tab.
5. Click "ADD TO THE ADDRESS BOOK" by each user/queue you wish to add.



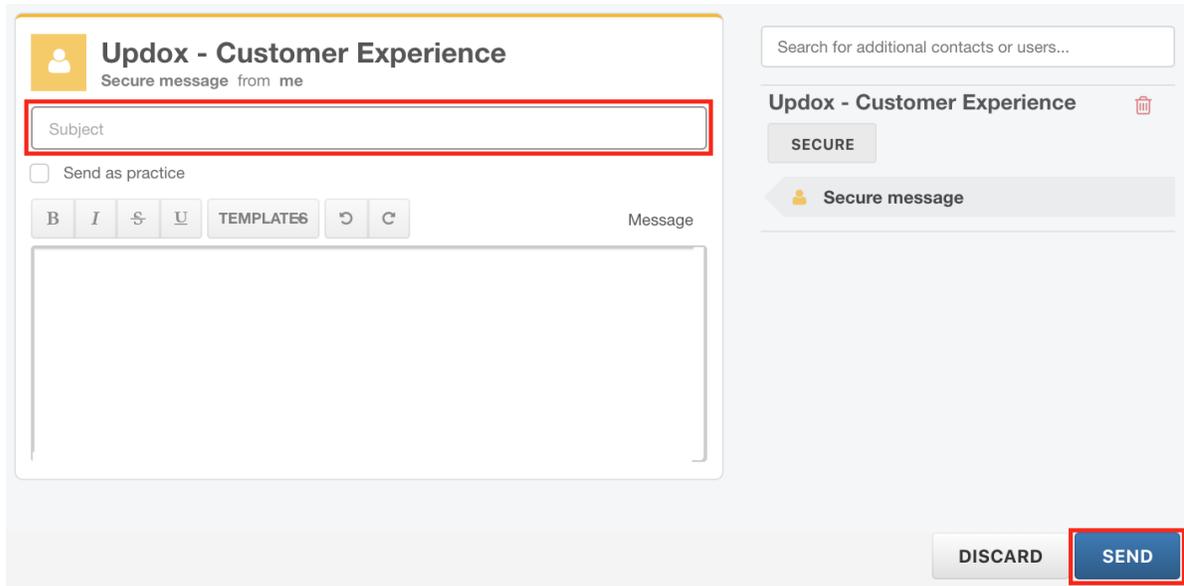
6. When finished, click the "X" in the upper right corner to close the [Address Book](#).

## Sending a Secure Message

1. Click "Compose" or "Send Item" on an Inbox item you wish to send.
2. Search for the name of the contact/organization.
3. Select the contact/organization from the search results.
4. Select the option to secure message and click "OK".
5. Enter a Subject.
6. Enter a Message (optional).



7. If you need to include additional documents, click the “+” under attachments, browse, then select the files you wish to attach.
8. Click “SEND”.



Attachments drag pages to change order



## Replying to a Secure Message

1. Click “Reply” on the secure message item in your Inbox.
2. Enter a message (optional).
3. If you need to include additional documents, click the “+” under attachments, browse, then select the files you wish to attach.
4. Click “SEND”.

## Questions

Reach out to Updox Support at <https://updox.com/support>.