

INTERNAL: Porting numbers into DrChrono, Updox

07/24/2024 6:00 pm EDT

Porting Explained

Porting transfers your fax line from the number's current local carrier to Updox, one of our fax vendors. When a number is ported, a number associated with a physical fax line or another e-fax service can be transferred into a user's drchrono account. When porting is complete, this **immediately disconnects the number** from any other devices (other fax machines, credit card processing machines) and any auxiliary services the original carrier offered (select internet services, etc). Please make sure the line is not used for any other devices/services before discontinuing the service. **Once this porting is complete, this process is considered irreversible on our end. This is not an instantaneous process and may take up to 14 days to complete.**

Porting a fax number into DrChrono/Updox

STEP 1: Check pre-requisites.

1. Check with your local fax carrier to see if they allow porting. Make sure the contact info they have on file is accurate.
2. Is this fax line used for your internet service or credit card reader? (If yes, do not port your number, continue to use Call Forwarding.)
3. Before you can set up the account, the office address needs to be set up under BOTH the **Doctor Settings** AND the **PG Settings**.

Note: The zip code must only be 5 digits. Additional digits will cause an error if the account needs to set up Direct Messaging later.

Official office address 225 Schilling Circle Note: must enter all "Official Office" fields (including phone) for this to be used.

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Official office city Hunt Valley

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Official office zip code 21031

Official office zip code 21031

Official office state Maryland

Official office state Maryland

Official office phone 4105555555

Official office phone 410-555-5555

Appointment default primary Set the doctor, for an appointment automatically, to the patients primary doctor

Hide doctor change Hides the doctor change dropdown and doesnt let users within PG to access each others sensitive information.

Hide patient export Hide so that practice group doctors that are not admins can not export the patient data.

Sort offices by name

Practice Group Options

The zip code must only be 5 digits

STEP 2: To begin the process, the provider must have an existing Updox account with DrChrono. Check to see where the setup process is at on the fax management page found here: https://tyour.drchrono.com/fax/configure_doctor_fax/ or by clicking on 'Manage Fax Number' in the customer's CRM page. Click on the 'Port' button to continue.

1. If you see this, the customer does not have an Updox account:

Provision

Port

Link

Start a Porting Request

Configure Tomas Your's Updox account before filing a porting request.

1. [Set up a Practice Group](#) - Done! (205730)
2. [Name the Practice Group](#) - Done! (External Testing Account for Thomas Your #100950)
3. [Create Updox Account](#)

In order to create an Updox account for the provider, you must make sure that the provider is inside a practice group under 'Practice Group Settings'. **This is mandatory for all providers, including solo providers who do not have a practice group.** If the provider is a solo practitioner without a PG, please ask the provider what they would like to name their practice.

Once you've set up the practice group, click 'Create Updox Account'. You're looking for this page to turn into something that looks like #2 immediately below.

2. If you see this, the customer has an Updox account set up. Either you've created one earlier or the user signed up for Direct Messaging, which automatically creates an Updox account for them. Once you see this step, continue with the steps below.

Start a Porting Request

Start a Porting request by emailing updox, following standard drchrono procedure. Mention these account & user IDs.

Updox Account ID	10200
Updox User ID	122276

When Updox confirms the number has been ported, use the **Link** tab above

Note: If a provider already has an Updox account that they used prior to DrChrono, they cannot use that Updox account with us and need to create a new Updox account.

STEP 3: Fill out the porting request form in its entirety. Any missing information may cause delays or rejections in the porting request.

Porting Request Form

NOTE: If any information on this form is missing or incorrect, Updox will charge us \$13.00 per resubmission.

NOTE: We internalize any porting costs associated with this process.

Internally obtained information

Updox User ID Number (not drchrono User ID): From [fax management page](#)

Updox Account Number (not drchrono Account Number): From [fax management page](#)

Customer email address:

Information obtained directly from the customer

Number to Port:

Authorizing Person:

Exact Name and Address (Used for billing on that account):

Carrier Account #: (The account number with the current carrier for the number you wish to port.)

Billing Phone #: (The contact phone number the current carrier has on file for your account.)

Current Carrier:

Attachments (required):

1. A copy of your most recent bill from your current carrier
2. Completed Updox Letter of Authorization form attached [below](#) to this article for download.

STEP 4: Send the porting request form to porting@updox.com.

According to the porting guide provided by Updox:

"Upon receipt of your request we will run a preliminary check on the number and will begin the porting process based on results. We will communicate by email to provide status updates, estimated completion or collect other information as needed. The porting process takes 14 days to complete."

STEP 5: Wait for porting confirmation from Updox. Once confirmation is received, the fax number will be ported into our drchrono company Updox account but will not yet be associated with a customer account.

STEP 6: Complete the linking process on our end. Go into the [fax management page](#) and click on 'Link'.

Finish a Porting Request

Link an **existing** fax number to Thomas Your. Make sure the selected provider has **already** transferred the number to drchrono's account.

Backend:	<input type="text" value="updox"/>
Number:	<input type="text" value="6502427538"/>
Use for outbound:	<input checked="" type="checkbox"/>
<input type="button" value="Check & Link"/>	

- Backend: Select 'Updox' as the backend carrier
- Number: Type in the newly ported number that you received confirmation that
- Use for outbound: Dependent on your desired configuration, checked sets the ported number as both inbound/outbound number. Since only one number can be set for outbound, checking this box sets any previously outbound numbers as inbound only. If unchecked, the ported number will be set on a receiving basis only.

STEP 7: Confirm successful linking and notify customer

If your linking was successful, you will see the ported number displayed in the account's list of fax numbers in the fax management page.

Fax Accounts:

Messages to any of these fax numbers will be visible to Thomas Your

id	Backend	Number	Fax Use	Owner	Select Outbound Line
8	updox	6502427538	Inbound & Outbound	Thomas Your (100950)	Currently Selected
48	hellofax	14086040185	Inbound	Thomas Your (100950)	Select

Updox FAQ:

Paraphrased from the [Updox Fax Setup](#) page.

What happens to my fax machine in my office once I port my fax line to Updox?

After the port is complete, the fax line will no longer be active in your office. You will not be able to send/receive faxes on your fax machine.

Will it be possible to fax to international numbers with Updox?

Unfortunately, Updox does not support international faxing now. You will have to make other arrangements to send/receive faxes to internationally.

What happens if I request to port the **WRONG** fax line?

If you submit incorrect info on your port request and the port is complete we can request that a correction be made if reported to Updox immediately (within 24 hours). This is called a "snap back" and Updox charges \$300 for this process. Ask our sales department to see if we also include a service fee.

LOA
