Set Up Direct Messaging

Direct Message is a secure electronic messaging system that enables transmission of protected health information (PHI) when referring a patient to other authenticated providers. Upon initiating the first referral, you will be prompted to set up Direct Message and authentication with Updox. If you need assistance with the set-up process, contact Updox Support.

Starting 2019 UpDox will disable support of the SSL and TLS 1.0 protocols, which may cause some users to see an error message when accessing UpDox from Kareo. Follow the steps in their status blog to verify your operating system and browsers are up to date.

Access Direct Message Setup Process

1. At the bottom of a clinical note, click Send Referral By and select Direct Message from the drop-down menu. The Send Referral window opens.

2. Click Send Message at the bottom of the window. The Direct Message Setup window opens.
Set Up Direct Messaging

Create Domain Name

If this is the Direct Message initial setup for your practice, you will be asked to create a practice-wide domain name.

1. Enter your practice name without spaces to create a Direct Message account for your practice.
2. Click Continue. The window to Create your username opens.

Create Your Username

3. Enter a username for yourself (without spaces).
4. Click Continue.

5. The Complete Setup window opens and your Direct Message email address displays.

Note: If your practice has not completed the authentication process, the Authenticate button displays. Follow the instructions below to complete the process, if necessary.

Direct Message Authentication

A one-time authentication process must be completed by a legal representative of the practice. Once completed, the authentication is applied to the entire practice.

1. Click Authenticate in the Complete Setup window. The DirectTrust Activation certificate opens.
2. Review the information and click **I Accept** to agree to the terms. The **Experian User Agreement** opens.

3. Review the information and click **I Accept** to agree to the terms. The Updox enrollment form opens.

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Complete the information on the enrollment page. Required fields are indicated by an asterisk. Green checkmarks display in a field once valid information has been entered.

4. **Business Name:** Your practice name auto-populates as it displays in Kareo.

5. **Practice Representative:** Enter your first, middle (optional), and last name. Choose a suffix from the drop-down list, if applicable (optional).

6. **Personal Information:** Enter your home address, date of birth, and personal email address.

7. **Personal Government ID:** Select **Individual NPI** or **Social Security Number** from the **ID Type** drop-down and enter the number in the field on the right.

8. **Personal Financial / Utility ID:** Select an option from the drop-down menu, then enter the corresponding details:
   - **Personal Telephone:** Enter your personal home or mobile phone number. Your home address must be associated with
this number.

- **Personal Credit Card**: For identity verification purposes only -- your card will not be charged.
- **Knowledge Questions**: Answer questions about your personal history.

9. **Confirmation Code / Voice Recording**: Enter a phone number where you can be contacted immediately and click **Call Me**. You will receive a phone call that provides you with a number to enter in the **Confirmation Code** field. You will also be prompted to verbally record a confirmation that you are an authorized representative of your practice.

10. A **Ready to be Submitted** status displays when a section is complete.

11. When all sections are complete, click **Verify Identity**.

12. A **Validation Failed** error displays if an error occurred in the verification process.

13. Click the question mark icon next to the error message for general information regarding the validation failure.

14. Make corrections to your information, as necessary, and click **Try Again**.

15. When all information has been verified, a confirmation window opens and the enrollment process is complete.