Setting Up Direct Messaging

07/08/2024 7:36 pm EDT

To use direct messaging, you'll need to get it set up. Please contact your account manager, implementation specialist, or our support team to turn on this feature for you. In this article, we will look at setting up direct messages. Click here for information on sending direct messages.

Once you have this feature activated, you'll need to set up your direct messaging address and then verify your identity. If you're in a Practice Group only the first provider needs to verify their identity but everyone will need to set up their own direct messaging address.
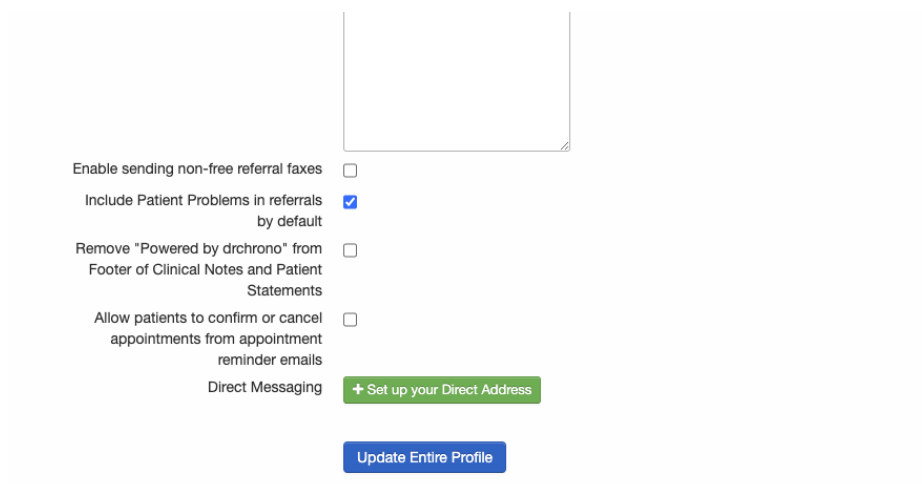
Setting up Direct Messaging

1. Go to **Account** > **Provider Settings**
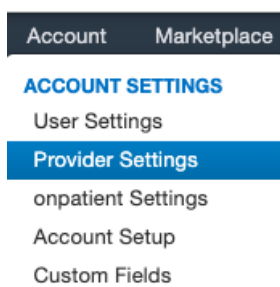
2. Click on the **General** tab and then scroll to the **Communications** section.

3. You'll see a green button to **set up Direct Messaging**, click on this.

4. You'll be asked to confirm some basic information. Select your **Timezone** and **Primary Office**. Click **Next**.

Set up Direct Messaging

Confirm your information

Name	James	Smith
Timezone	Eastern (-5/-4 hours)	
Is provider?	✓	
Primary office	Primary Office	

225 Schilling Circle
21212, MD Baltimore

Practice Group Organization	Family Practice

← → Next   Confirm information > Select Direct address > Validate identity

5. Create your direct address. The username can be changed. It will default to your DrChrono username. Click **Change Domain** to create an address.

Set up Direct Messaging

Select Direct address

SampleUser @<N/A>.drchronodirect.com

↑ Change domain

← → Next   Confirm information > **Select Direct address** > Validate identity

6. Enter a domain name such as the practice name. Once you're happy with the direct address click **Next**. Make sure you're happy with this address. As it **cannot** be changed later on.

Set up Direct Messaging

Select Direct address

SampleUser	@	.drchronodirect.com

Save ⊘ Cancel

← → Next   Confirm information > **Select Direct address** > Validate identity

Once you have created your domain name, click **Next**.

Set up Direct Messaging

Select Direct address

SampleUser	@drchrono1.drchronodirect.com

↑ Change domain

← → Next   Confirm information > **Select Direct address** > Validate identity

7. Click **Get Started** to go to the next step.

Set up Direct Messaging

Validate identity

Your practice's primary provider needs to validate their identity. This only needs to be done once.

Get started

← ✓ Finish   Confirm information > Select Direct address > **Validate identity**

8. There are two agreements that need to be confirmed. Click **I Accept**.

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.

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Direct Trust Activation - Domain-level Certificate

Updox is the Health Information Services Provider (HISP) for your practice. This service enables you to send and receive Direct messages for the purpose of secure healthcare communications. 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.

By accepting this agreement, you acknowledge that:

- The practice is a legal entity.
- You are the authorized representative of the practice.
- You agree to have your identity verified by an external party and to have your verbal attestation recorded as the practice representative.
- The identity information you are about to provide is accurate and applies only to you.
- The practice is compliant with HIPAA privacy and security regulations.
- The practice will use Direct messaging exclusively for healthcare purposes.
- The practice will not use Direct messaging for marketing purposes or spamming other Direct users.
- The practice will not allow external parties to use the practice's Direct messaging account.
- 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.
    - Agree to keep proof of each user's identity for at least 7 1/2 years after their employment ends.
    - Agree to provide documented proof of a user's identity verification to Updox for auditing purposes upon request. Failure to provide this information may result in the revocation of your practice's Direct messaging credentials.

Violation of this agreement is grounds for cancellation of the Direct messaging service.

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.

→ **I Accept** **I Decline**

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Experian User Agreement

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.

→ **I Accept** **I Decline**

9. Next you'll need to validate your identity by entering your **business**, **personal** and **individual NPI** information. You will need a phone present to do this as you'll be called with a code to enter at the end of the process. You will see a (

) icon when the section info is ready to submit. Click **Verify Identity** to complete the process.
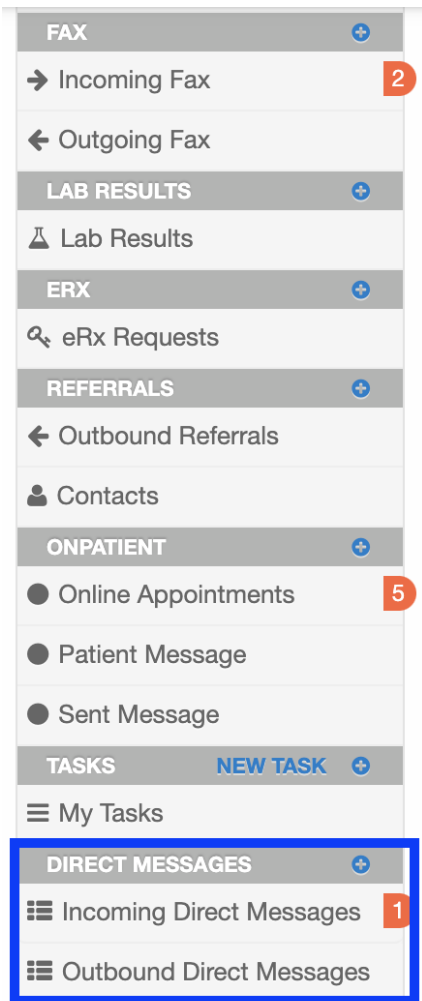

9. Once you're verified, you can start sending direct messages!

10. You can see your direct address by going back to **Account** > **Account Settings** and scrolling to the communication section.

11. You can view your incoming and outbound direct messages in the message center.

Click here for our article on sending direct messages.