Partner Release Notes

December 2025 Release Notes

What's new

Updated Partner Portal password requirements

We updated the minimum password complexity requirements for all Partner Portal users.

Your password must now contain:

- Between 16 and 72 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 digit
- At least 1 special character

Additional requirements are:

- Passwords cannot begin or end with a whitespace
- Password rotation after 90 days

New API to get a portal configuration

We added a new API named `/PortalRetrieveConfig` to retrieve the portal configuration established in `/PortalConfigure` .

April 2024 Release Notes

What's new?

New /SmsStatus Public API

We have added a new API to `/SmsActions` called `/SmsStatus` that allows partners to get the status of a message if it was sent or failed to send due to 'X' when sending via the delayed queue approach that Amplitude uses.

New SMS Numbers Section to the Accounts Page in the Partner Portal

An SMS Numbers section has been added to the accounts page in Partner Portal for accounts with SMS. It will show the provisioned SMS numbers (for the SMS Quicksend module and `/SmsActions` Public APIs) as well as the SMS Verification status for each number.

Updated the outbound_fax Webhook to Support New Cancel Statuses

We have updated the `outbound_fax` outbound_fax webhook to supply `canceled` status for faxes that have been canceled via the Outbound Fax Dashboard UI.

> Partner's who were implemented prior to April 2024 should reach out to Updox Support if they are interested in adding the cancel fax feature.

Updated /FaxStatusGet to Support New Cancel Statuses

We have updated the `/FaxStatusGet` API to check for the support fax 'canceled' status.

https://updoxqa.com/api/newio

March 2024 Release Notes

Add /SmsSendNumberList Public API

We have created a new `SmsSendNumberList` API under `/SmsActions` so that partners can retrieve the SMS number list for an account including the provisioned numbers, associated location/queue (if applicable), and verification status. This allows our partners to know which numbers are available for use (available to send on).

New Partner Business Details Page in Partner Portal

We have added a new Partner Business Details page to the Partner Portal for partner management of vendor business details for maintaining the company info as well as the primary point of contact on file with Updox, which is especially important for the SMS number verification process required for all SMS products.

Update to /PatientDirectMessageSend 'from' Field to Treat Blank the same as NULL

The Public API of `/PatientDirectMessageSend` will now work from the newio/"Interactive API" page when not using `from`. Additionally, we fixed some validation throughout the API.

February 2024 Release Notes

Updated /Practice Create APIs to Not Allow Whitespace Characters for the accountID field

We have updated our `/PracticeCreate` APIs so that whitespace characters will not be allowed in the `emrAccountID`. For `/PracticeCreate`, `/PracticeCreate/1.1`, `/PracticeSave`, and `/PracticeSave/1.1`. A `4060` bad request error will be returned if the `emrAccountID` contains any whitespace characters.

SMS Send From Numbers

We have added default information to the numbers used in sending SMS texts. You have the option to select a 'Send From' number for a location or queue when sending SMS text messages. If you do not select a location or queue, the message will be sent from your default practice location.

If your default location does not have an approved number, you can request a number.

Send a Text Message ✕

I want to send a ○ Secure Text ● SMS Text What's the difference?

Send to * [Search by name, type number, or email...] ✕

Send From * [-- Please Select Location -- ▼]

Select an SMS Approved Location below.

⚠	**Default Location**: No Number	Request SMS Number
	Anne Arbor (Northern Offi...: (704) 555-0127	📱 SMS Approved
Template	**Columbus**: Number Pending	📱 SMS Pending
	Dublin: (219) 555-0114	📱 SMS Approved
Form	**Powell** : No Number	**Add Number**
	Worthington: (229) 555-0109	📱 SMS Approved

Message *

Discard   [Send SMS Text]

January 2024 Release Notes

New Telehealth URL

We have added the ability to add the link for a Public Waiting Room to reminders to simplify your Video Chat text and email reminder workflow.

Once the link is set up, select it from the new Public Wating Room dropdown.

Next, when setting up or editing your text or email reminder scripts, you can select the `[telehealthurl]` variable to link the waiting room you set up.

For more information see our article Adding a Waiting Room Link to Your Reminders.

Updated SMSSend API Flows

To comply with new regulations from the Federal Communications Commission (FCC) through the Telephone Consumer Protection Act (TCPA) we have been making changes to our SMS-based products to ensure compliance with these regulations.

For API Partners:

Individual SMS number verification is required for each account, as well as each location and/or queue before SMS messages can be sent. For new accounts, locations, or queues, the initial call to `/SmsSend` will initiate the submission process for SMS number verification. SMS number verification can take 2-5 business days, so we recommend waiting until confirmation that SMS number verification has been completed prior to allowing your

customer to begin utilizing SMS quick send.

Starting on January 31st, 2024, when `/SmsSend` is called for an account, location, or queue that doesn't have a verified SMS number, a 4035 error will be returned stating, "SMS number not verified; verification has been requested." until the SMS number provisioning and verification process has been completed.

Please note that if we find incomplete business information on file required to submit for SMS number verification, a 4039 error will be returned stating, "On file account business information is insufficient for verification." Please use `/PracticeUpdate/1.1` to supply required business information such as address and website for individual accounts.

SMS Send From Numbers

You will soon be able to view the SMS numbers assigned to your practice (as well as queues or locations) as you are sending an SMS text message. Along with the number, we will display the carrier approval status so you know if the number is ready to be used.   You will also be able to add a number to the location or queue if it does not have one already assigned.
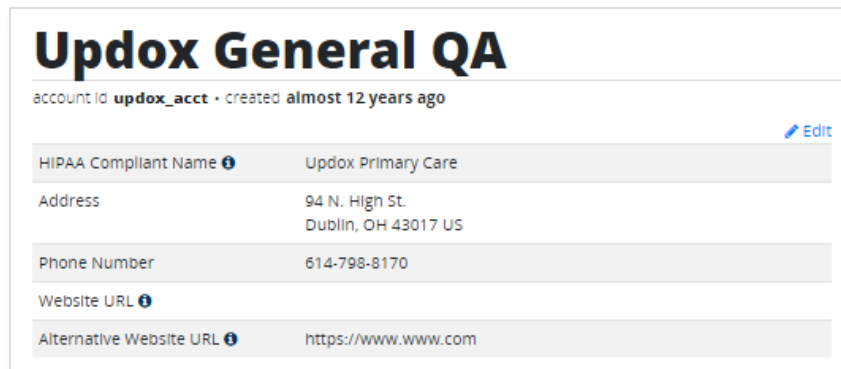

November 2023

Partner Portal New Column Name: Account ID

We have changed the column name from emr_account_ID to "Account ID" on our Partner Portal Accounts pages.

HIPAA Compliant Names, Practice URLs, and Phone Numbers Now Editable through Partner Portal Account Page

We have updated our Partner Portal Account page so that you can now edit existing HIPAA Compliant Names, Practice URLs, and Phone Numbers.

- The HIPAA Compliant Name, Website URL, and Alternative Website URL will now display around the Address section on the Account (PID) page.
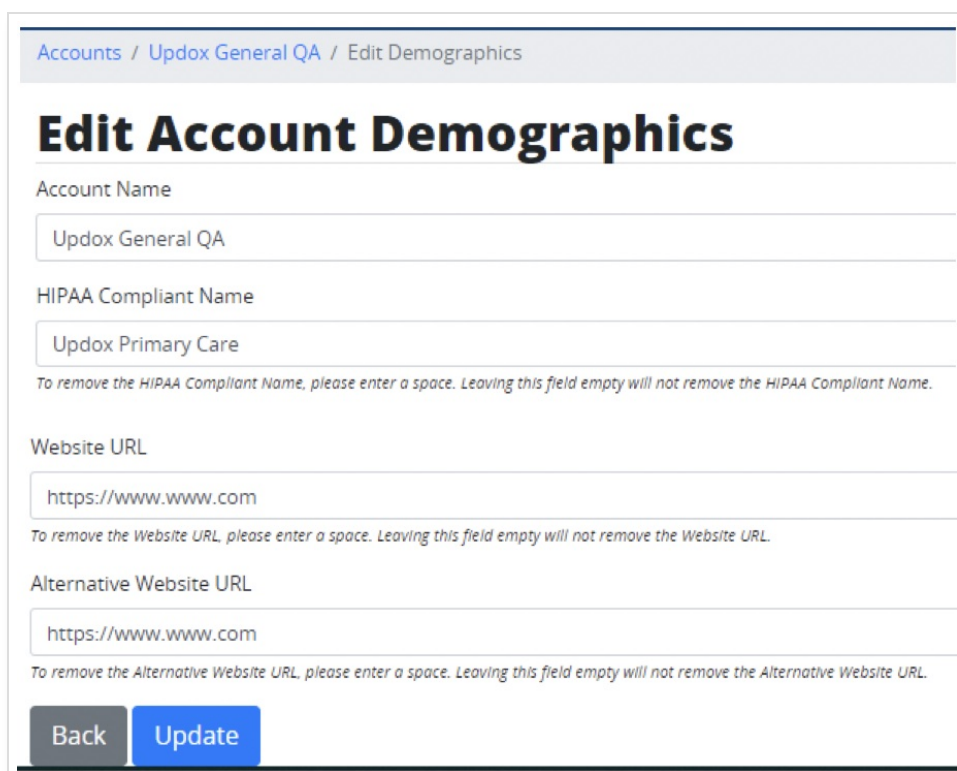

- In the **Edit Account Demographics,** the values display in the following order:

  - HIPAA Compliant Name under Account Name

  - Phone Number under Postal/Zip Code

  - Website URL under Phone Number

 - Alternative Website URL under Website URL

Update to the /UserActions APIs on the NewIO Page

We have made updates to the `/UserActions` documentation for the `UserCreate` , `UserUpdate` , and `UserSave` fields.

- The `Provider` field has been updated to state:
    - If the user is a provider with an NPI, this should be `true` . Usage of this depends on how the partner's integration strategy is configured.
- The `Admin` field has been revised to state:
    - If `true` , gives the user who is being saved access to the admin menu within the Updox Inbox. (Login ID/Password or SSO required)

Create a Release of Information request from an Inbox Item

You can now create a Release of Information request from items you receive in your Inbox. Select the item and click **Create ROI Request** to get started with your request.
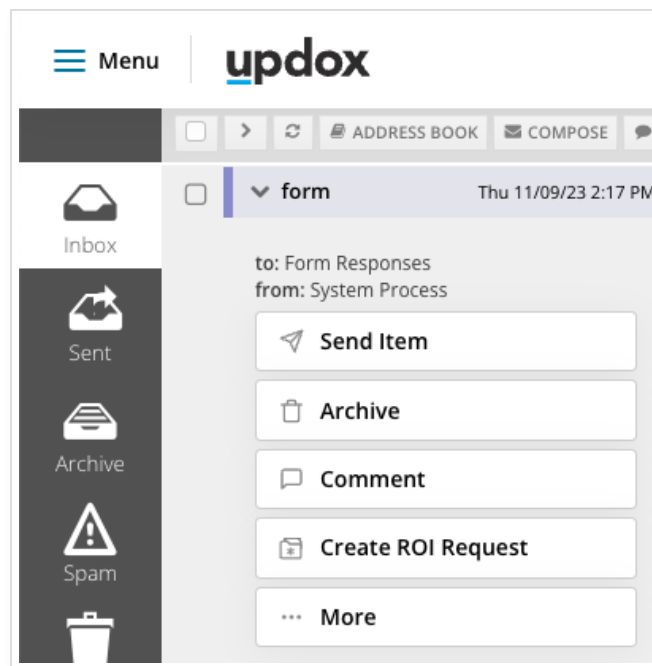
Learn more about Release of Information here.

October 2023

Updates to the Practice Actions API Group

We have updated the Practice Actions APIs to include the HIPAA-compliant practice name, practice URL, and alternative URL. `/PracticeCreate/1.1` , `/PracticeSave/1.1` , and `/PracticeUpdate/1.1` have all been updated to include new fields:

- `nameHIPAACompliant` - Added an optional field to specify a HIPAA-compliant name for the practice in patient-facing communications
- `websiteURL` -Added Optional field for the practice's website
- `alternativeWebiteURL` -Added optional field for the practice's alternative website (e.g Facebook or WebMD Profile)

See https://updoxqa.com/api/newio

Version PracticeGet1.1 and /PracticeList1.1 to PraticeGet1.2 and PracticeList1.2

To reflect the updates above to `/PracticeCreate/1.1` , `/PracticeSave/1.1` , and `/PracticeUpdate/1.1` , we have also versioned `/PracticeGet/1.1` and `/PracticelList/1.1` to `/PracticeGet/1.2` and `/PracticeList/1.2` APIs to return the HIPAA-compliant practice name, practice URL, and alternative URL described above.

Updated Partner Portal Creation Page for HIPAA Compliant Practice Name and Practice URLs

For Partner Portal users, we added the ability to include a HIPAA-compliant practice name, practice URL, and alternative URL when creating a new practice. Under the Accounts page, you will see the new fields to enter the information.

Support Canadian Postal Codes with PatientsSync

We have updated the `/PatientsSync/1.1` API. All address fields are nested under `postal` and we have added `country` as a required field if a postal code is entered.

Updox Public API Updates

Error Message When Syncing a Canceled Appointment

When syncing an appointment using the `/AppointmentsSync` or `/AppointmentsSync/1.1` and the appointment does not yet exist and has `"canceled': true` the appointment will not be created successfully and the message was returned `null` .

We have updated the error message to provide more context to the error. The new message reads "*Unable to cancel appointment as the appointment does not already exist".*

Public API Changes

Location and Suffix Added to PatientsSync

Changes to the PatinetsSync

- `location` - A patient will be associated to a location based on the location code from the `/locationSync`
- `suffix` - Suffix will only accept the values that match the Updox UI
- If an empty `location` or `suffix` is submitted, any previous values will be overridden
- An error will be returned for invalid `location` or `suffix` values

New CSV Mapping for SAML-Federated Users

We have created the CSV mapping workflow for SAML SSO users. The new CSV mapping will allow SAML SSO users to create new users and/or modify, and deactivate existing user accounts.

Restrict User CSV to Only Admin Users

We have added the ability to restrict User CSV file uploads to only Admin users. Non-admin users will not have the option to upload User CSV files. Non-admin users will still have the ability to upload CSV files for other tasks.
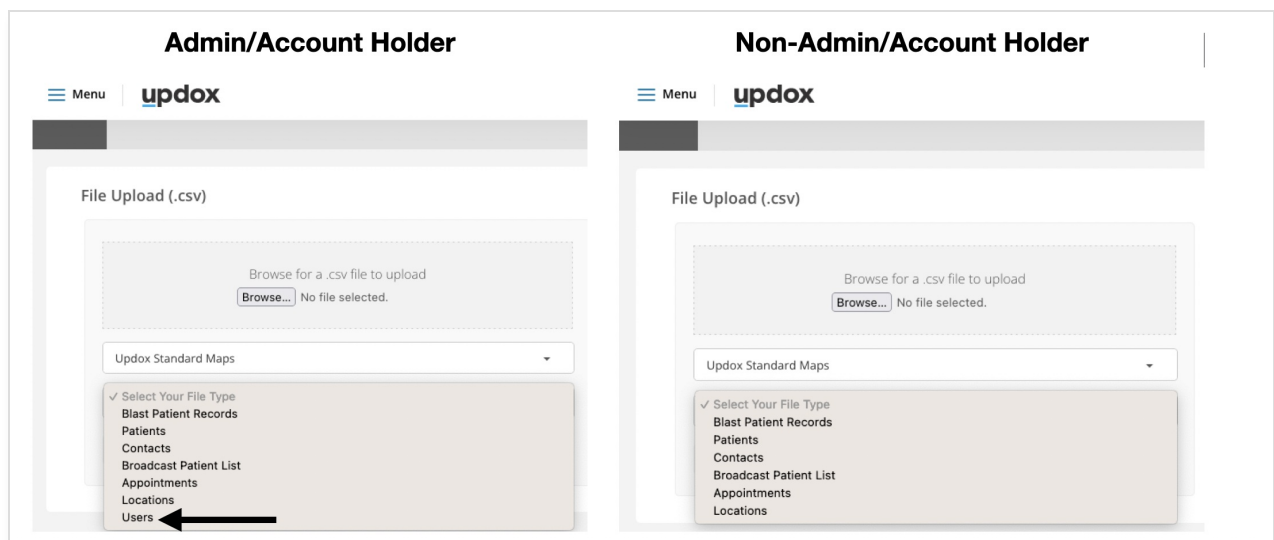
April 2023

Public API Changes

Require At Least One AppointmentType for /AppointmentTypesSync

Overview: API Maintenance

Previously the `/AppointmentTypesSync` would return successfully even if no `appointmentTypes` are included, which was confusing. If no `appointmentTypes` are included, the `/AppointmentTypesSync` API now returns an error to say that at least one appointment type is required. Additionally, specific errors will be supplied if the ID or summary is not populated, as both are required or are too long.

March 2023

Public API Changes

Updated /SmsSend Documentation on the NewIO Page

Overview: API Maintenance

We have updated the documentation of `/SmsSend` on the NewIO page to better represent the actual maximum character account that is allowed when considering the footer count.

- Documentation of the `content` field in `/SmsSend` should be revised to state:

    - The content of the SMS. Please note that accounts using the consent footer will actually be limited to a maximum of 597 characters as each message will include the following footer (which equates to 73 characters): "To stop receiving these messages, reply STOP. Msg&Data rates may apply."

    - Maximum character length is 670. This is required.

Support Additional FaxOemSend Validation Failures

Overview: API Maintenance

As a public API vendor calling the `FaxOemSend` API, I need a way to get back information related to validation failures instead of receiving the system error code (5000) which is what we return when we have an unexpected failure on our end.

- Sending to a country code that isn't `1` is not allowed:

    - Only applies to 11-digit numbers

    - Should return `4060`

    - Error message in the response and doesn't require modification

        - Example: `Faxing to or from number "35555555555" is not currently allowed; only numbers with a country code of "1"` are supported at this time

- Sending to all 0's to number

- known invalid number

- would return `4060`

- Error message would need to be added: `Invalid fax number`

- Currently allowed but fails after the fact when we try to send:

  - We make multiple attempts to deliver this plus we convert and store the document. Silly.

  - if this is too much of a behavior change, we can pull to its own ticket but would prefer we include it

- Sending > 11 digits:

  - Should return `4060`

  - Error message in the response and doesn't require modification

    - Example: `Number "000000000000" must be 10 or 11 digits in length`

> **NOTE:** `toFaxNumber` - Min length 10 characters. Max length 12 characters. The fax number must be valid and not blocked.

Create Active Account List CSV Export from Partner Portal

Overview: API Maintenance

We have created a way to export an active account list as a CSV file for Partner Portal users.
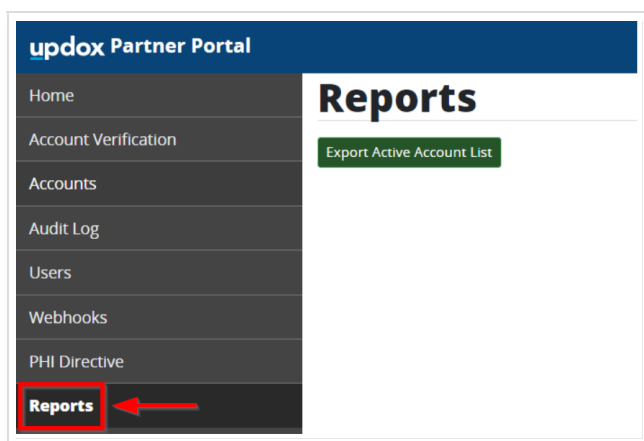
- Created a new menu option called **Reports**.

- Created a process to generate a CSV file with the following fields:

  - `name`

  - `emr_account_id` (spell out column name as 'Account ID' in CSV output)

  - `phone number`

- - - fax number

- - - address1

- - - address2

- - - city

- - - state / province

- - - postal

- - - country

- This will only include active accounts

- Export will be initiated from a button in the Reports section of the Partner Portal.

  - The top of the page will say "Reports".

  - The button will be named "Export Active Account List".

- Export can only be run by Partner Portal users with an Admin or Super Admin role.

- Export needs to be logged in the (existing) Audit Log

Partner Portal

Create Active Account List CSV Export from Partner Portal

Overview: New Report

A CSV export of active accounts can be initiated from a button in the Reports section of the Partner Portal by an Admin.

February 2023

Public API Changes

Outdated MU Measure APIs Allowed Date Range No Longer to Exceed One Year

Overview: API Maintenance

- Restricting date values to prevent infinite date ranges on MeaningfulUse_2017_Actions - MeaningfulUse_2021_Actions

- Allowed date range should not exceed one year

- `4060` Invalid Arguments error will be displayed if a user tries to submit a date range > 367 days

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Hide & Modify Documentation of /FaxNumberBlockSave on NewIO Page

Overview: API Maintenance

- Hide by default `/FaxNumberBlockSave` on the NewIO page, so it is listed in the outdated methods

- Documentation of the `/FaxNumberBlockSave` should be revised to state:

  - "Add a fax number to or remove it from the Updox blocklist which directs inbound faxes from blocked numbers to the Spam folder within the Updox web application."

Delete SsoMessageActions.MessageInboxList

Overview: API Maintenance

- Users will no longer see the api `MessageInboxList` under the `SsoMessageActions` section of the interactive api page

- API calls to the API will return a 404

Remove TokenGet Endpoint

Overview: API Maintenance

`TokenGet` under `SsoMessageActions` is no longer in use and has been removed.

Created New RetrieveSubmittedFormSummaries Public API

Overview: New API

As an Updox customer or partner who would like to use Updox Forms discrete data retrieval, I would like an API I can call to obtain the list of form IDs for forms submitted within a specified date range so that I can identify the ones I'd like to retrieve the form data for and then use the ID received in this API to call the RetrieveSubmittedForm.

- Create a new `RetreieveSubmittedFormSummaries` API under `FormActions`

- Input:

  - `fromDatetime`

  - `toDatetime`

- Dates range not to exceed 7 days
    - `includeTrash` : true/false
        - Default to false
- Output
    - `formId` : the unique identifier of the form being submitted
    - `submittedAt` : the date/time the form was submitted
    - `title` : the title of the form being submitted

API Documentation should state:

Get summaries of submitted forms in the given time range.

The response will include the submitted formId, date/time the form was submitted, and the title for forms submitted within the timeframe specified in the request parameters.

Please note that a maximum of 7 days can be specified for the timeframe between the fromDatetime and toDatetime.

The formId can be used to retrieve the submitted form details using the RetrieveSubmittedForm API.

January 2023

Public API Changes

Updated Documentation for MessageRetrieveWithAttachmentId

Overview: Documentation Update

MessageRetrieveWithAttachmentId is not intended to be used to retrieve form data, instead use MessageActions.MessageRetrieve.

> **NOTE:** The new FormActions.RetrieveSubmittedForm can be used to retrieve discrete form data.

2022 MU Measure APIs Allowed Date Range No Longer to Exceed 1 Year

Overview: API Maintenance

- Restrict date values to prevent infinite date ranges on `MeaningfulUse_2022_Actions` APIs

  - Allowed date range should not exceed 367 days.

  - `4060` Invalid Arguments error will be displayed if a user tries to submit a date range > 367 days

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Generate Webhooks for Email Sent Faxes

Overview: API Maintenance

A webhook notification is now generated when an inbox item for a forwarded "email fax" is created in Updox.

Updated SmsSend API Error for Messages That Are Too Long

Overview: API Maintenance

We have Improved the error message returned to Updox partners when a `5000` error is triggered by a SMS message > 670 characters.

- When the carrier returns the error: Message Too Long: "SMS message is too long (must be <= 670)"

  - Message should now return error code `4060` and message "Validation Failure - Message content is too long"

December 2022

Public API Changes

Moved 2017-2021 MU APIs to Outdated Methods on the NewIO Page

Overview: API Maintenance

Hide all of the outdated Meaningful Use (MU) APIs (methods and endpoints) on the interactive API page and only display the one from the current year (2022).

- `MeaningfulUse_2022_Actions` will still be visible

- Hide all of the outdated MU APIs on the NewIO page:

  - `MeaningfulUse_2017_Actions`

  - `MeaningfulUse_2018_Actions`

  - `MeaningfulUse_2019_Actions`

- MeaningfulUse_2020_Actions

- MeaningfulUse_2021_Actions

October/November 2022

Public API Changes

Retire SsoMessageActions.MessageCompose
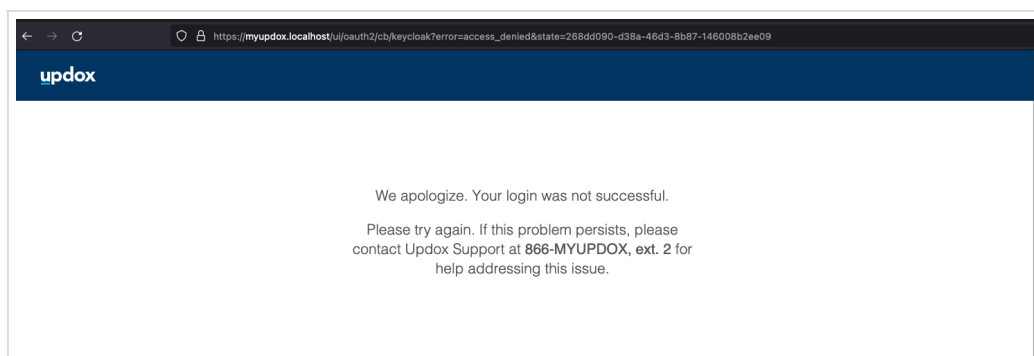
Overview: API Maintenance

- Users will no longer see the api `MessageCompose` under the `SsoMessageActions` section of the interactive api page

- Users are still able to call the `MessageCompose` api

  - Support will continue for users with established integrations using this API.

ApplicationOpen Invalid Cookie Error Page

Overview: API Maintenance

A new error page has been designed for end users when their authentication fails through ApplicationOpen API.

Improved Error Responses for PatientsSync API

Overview: API Maintenance

Updated the patientsSync API and added a more robust response JSON that provides the necessary error descriptions.

Public API Changes

Better Defined Errors for SmsSend API

Overview:

Below are the updated verbiage for the errors that are returned for the SmsSend API

- When carrier returns unrecognized error code, api response returns validation error code `4060`, and generic message "Validation Failure - Unable to send Message"

- When carrier returns an error code related to message being too long, api response returns validation error code `4060`, and message "Validation Failure - Message content is too long"

- When carrier returns an error code related being unable to send because of block or blacklist, api response returns validation error code `4060`, and message "Recipient Consent Failure - Unable to send message to recipient because of active blocking rule"

- When carrier returns an error code related being a non-mobile number, api response returns validation error code `4060`, and message "Validation Failure - Unable to send message because recipient number is not a mobile number"

Public API Changes

Moved Appointment Related APIs to AppointmentActions

Overview: Documentation Update

To improve organization we moved the following APIs from IntegrationActions to the AppointmentActions endpoint:

- AppointmentStatusesGetByDate
- AppointmentStatusesGetByIds
- AppointmentTypesDelete
- AppointmentTypesRetrieve
- AppointmentTypesSave
- AppointmentTypesSync
- AppointmentsSync
- AppointmentsSync/1.1

Moved ReminderConfig to AppointmentActions

Overview: Documentation Update

We have moved the ReminderConfig API from IntegrationActions to the AppointmentActions endpoint to improve organization.

Hide VideoCallActions APIs

Overview: API Maintenance

VideoCallActions APIs have been hidden from view.

> **NOTE:** We will continue to support the use of these APIs, however, we do not recommend a new adoption of them at this time.

Added 'STOP' Language for All SMS Messages Sent via API

Overview: Documentation Update

We have updated EventNotificationBulkCreate/1.1 documentation to state that "Notifications being sent via text will automatically include STOP language."

The message that is appended to the end of each SMS text message states, "To stop receiving these messages, reply STOP".

July 2022

Public API Changes

Update Patient Record for PortalAccountSave Language and Location

Overview: API Maintenance

It was found that 'language' and 'location' for a patient did not save when PortalAccountSave was called the first time, however if the exact same request body was called again, the 'language' and 'location' would be saved successfully.

This issue was resolved for both v1.1 and v1.2 of PortalAccountSave. The issue was not present for

PortalAccountSave v1.0.

Partner Portal Changes

## Renamed Patient Portal module and Added on in Partner Portal

Overview: Documentation Update

The version of the Updox Patient Portal will now be reflective on the Partner Portal. The previous label of "Patient Portal" will now show which version is configured, either "Patient Portal 1.0" or "Patient Portal 2.0".

Added Pagination to Audit Log Menu Dashboard

Overview: Performance Improvement

Partner Admin(s) are now able to view the User List in a more efficient way to ensure that their waiting time does not solely rely on the application fetching all Audit Logs by providing them multiple pages on demand.
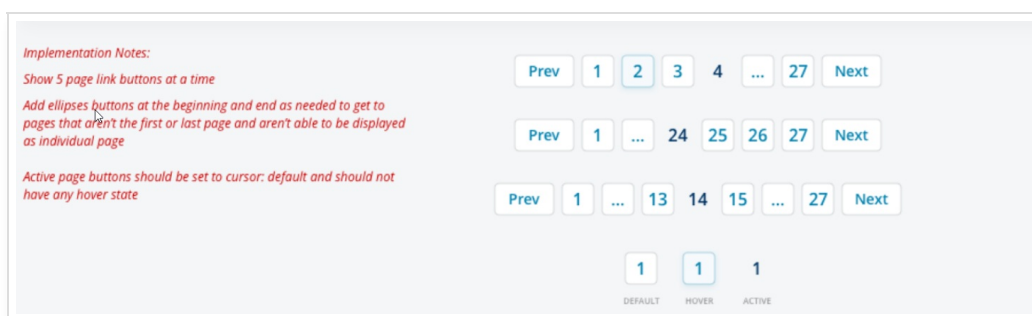
May 2022

Public API Changes

Added a New 'Reminder History' Status API

Overview: New API

We have created a new AppointmentActions API called RetrieveReminderHistoryStatus that allows Partners to retrieve reminder status details for an account.

Retrieve the reminder history status for an account which were created between fromDatetime and toDatetime. The time period must be between 1 minute and 24 hours.

Component List

Response object includes a list of lines with each line composed of:

- accountId - non-nullable string
  - The application's accountId of the practice the reminder is for from PracticeActions -> PracticeCreate, PracticeUpdate, PracticeSave -> accountId
- appointmentId - non-nullable string
  - The application's appointmentId the reminder is for from IntegrationActions -> AppointmentsSync -> id
- patientId - non-nullable string
  - The application's patientId the reminder is for from IntegrationActions -> PatientsSync -> id
- updoxReminderId - non-nullable uint64
  - The Updox created reminderId which uniquely references a reminder record (N of these records per appointmentId)
- updoxReminderHistoryId - non-nullable uint64
  - The Updox created reminderHistoryId which uniquely references a reminder history record (N of these records per updoxReminderId)
- type - non-nullable string
  - The reminder type being sent, one of Email, Telephone-Home, Telephone-Cell, Text Message, and No Reminder
- createdAt - non-nullable instant
  - The time the record happened at, format ISO-8601
- sentAt - nullable instant
  - The time at which the reminder was sent to the patient, format ISO-8601
- repliedAt - nullable instant
  - The time at which the reminder was replied to by the patient, format ISO-8601
- reminderStatus - nullable string
  - The status description for the reminder (ex: "sent", "confirmed", etc.)
- reminderStatusReason - nullable string
  - The status reason description for the reminder (ex: "Text reminder successfully delivered to destination", "Patient replied to confirm this appointment", etc.)

> **NOTE:** This endpoint requires whitelisting before usage. Please contact Updox via **partnersupport@updox.com** for more details if interested.

April 2022

Public API Changes

PracticeCreate Now Accepts IP Address Without a Port Specified

Overview: API Maintenance

We now accept an IP *with or without a port*. A bug was fixed which was causing "5000 internal server error" in the response JSON when calling PracticeCreate with an IP address provided, but no port.

Public API Changes

Added a 'Send as Practice' Option for PortalSendMessage

Overview: Version Update

We have created PortalSendMessage v1.1 to allow us to add a 'sendAsPractice' option allowing Partners to choose whether to send a Patient Portal Messages either as:

- The individual user
- As the Practice

Boolean: true/false *(Defaults to false)*

Public API Changes

Added Details for 'Location' to PortalAccountSave, PortalAccountUpdate, & PortalAccountCreate

Overview: Documentation Update

We have added additional details to the PortalAccountSave, PortalAccountUpdate, and PortalAccountCreate API documentation to better explain what is required for the Location field.

> "A location must be synced to Updox or created in the UI *prior* to setting this value for the portal account. Use the location code of the location."

Additional Information

Locations can be added via the LocationsSync API.

- Use LocationsSync.locations.code for PortalAccountSave/Update/Create.location.

- If the location was created in the webapp:
  - Use the 'Location ID' which can be found in the Admin Menu under Manage Locations for PortalAccountSave/Update/Create.location.

Created PortalAccountGet v1.5 to Add a 'Verified' Option

Overview: Version Update

Created PortalAccountGet v1.5 which added 'verified' to indicate when a patient has verified their patient portal account.

> **NOTE:** If a patient portal password reset has been performed on a verified portal account, the portal account will revert to unverified until the patient has successfully logged in.

January 2022

Partner Portal Changes

Added Pagination to the 'Accounts' Page

Overview: Performance Improvement

Partner Admin(s) are now able to view the User List in a more efficient way to ensure that their waiting time does not solely rely on the application fetching all Users by providing them multiple pages on demand.

What Changed?

Addition of the 'Page Selector' Section

Upon loading the 'Accounts' page, Admin Users are now presented with no more than 50 active accounts. If a vendor has more than 50 records, they will now have a "page section" visible at the bottom of their screen with the option to click a 'Next' button to navigate to the next 50 active account records. *(Shown below)*

Toggling/Filtering Your Results

Previously active accounts were displayed at the top of the list and inactive at the bottom. Now accounts will be listed in the order in which they were registered (oldest to newest).

A Radio Button has been added granting you the ability to filter your results to either show:

- 'Only Active Accounts' (Excludes Inactive Accounts)
- 'All Accounts' (Including both Active and Inactive accounts)

Additionally, a column has been added to denote whether the Account is Active *(the Green Checkmark)* or Inactive *(the Red 'X')*.

> **NOTE:** Inactive accounts now display with grey text instead of black.