

Offboarding Checklist

Phones

Thinking about canceling RevenueWell Phone? Here's a checklist to guide you through the process. Each item may impact your patient experience, communication, and office workflow, so we encourage you to review carefully before proceeding.

- ☐ **Protect Your Number:** Switching phone providers means you could be at risk of losing your phone number. To avoid this, request number porting before canceling your service to ensure your number is safely ported. If service is canceled before porting occurs, your phone number may be permanently lost.
- ☐ **Prepare for Porting Transfer:** Canceling your phone service might cause disruptions in your operations if you don't have a transition plan. To avoid phone service disruptions, you must complete porting with your new service provider before canceling phone services with RevenueWell. Once we disconnect service, we cannot restore it.
- ☐ **Consider Fees:** Some VoIP providers charge a one-time fee for porting a phone number. Ensure you understand the fees associated with changing services and porting phone numbers again.
- ☐ **Download All Media:** If you've recorded voicemail greetings or uploaded other media to the PBX, you must download it before canceling your RevenueWell Phones if you want to continue using it. Once service ends, these will be deleted.
- ☐ **Determine Equipment Ownership:** Review the terms of your equipment ownership with your Customer Success Manager before canceling your service. If you are on a contract, you may be liable for the cost of your phone equipment. If you own your equipment, perform a factory reset on all devices to remove specific RevenueWell settings.
- ☐ **Understand Device Compatibility:** Your device's compatibility with other vendors depends on whether the phone is unlocked and supports the necessary network bands for the new carrier.

If you have questions or concerns about offboarding, please contact your Customer Success Manager.