



# EPCS On-Boarding Guide

New Provider ID.me Enrollment

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xxx-xxx Month 2019

# Before you can start, there are prerequisites for EPCS

Before ePrescribe providers can electronically prescribe a controlled substance medication, **specific actions are required**

1. Must have a Veradigm ePrescribe **Deluxe** EPCS account \*this feature is not offered to our Basic users. They will be required to upgrade to Deluxe EPCS
2. The prescriber must have a valid DEA number on file within the ePrescribe User Profile
3. The Account must have an Administrator user within the account \*the administrator will be responsible for granting various permissions throughout the registration. This individual can be a non-dea registrant
4. The prescriber must have either a mobile phone or tablet to download the ID.me app. This app is used during the Id.me registration as well as the 2<sup>nd</sup> factor authenticator

## **Additional Notes:**

The registration process will be slightly different depending on the type of practice you are associated with.

- For multiple physician practices, three individuals are required to participate in the process that grants access to the Electronic Prescribing of Controlled Substances (EPCS) features for a provider.
- For single-provider practices, one physician (and is the only user within a practice) can perform the process themselves.

For detailed information please review the EPCS User Guide in iLearn within the ePrescribe application



# Getting Ready

This document will discuss the multiple steps that the practice / providers will need to follow when registering for EPCS. Each provider within the practice, that wishes to send controlled substance prescriptions electronically, are required to complete this registration process

The registration is broken up into 4 Steps below. Each step will be discussed in detail throughout this document

## **Step 1:** Enable EPCS privileges (Admin or Provider)

- Grant the provider permission to begin the registration (this step can be performed by a non-DEA registrant )

## **Step 2:** EPCS ID.me Registration (Provider)

- First provider can begin the ID.me registration

## **Step 3:** Granting EPCS Approver Status (Admin or Provider)

- Grant the first provider permission to approve the final EPCS permissions to additional providers within the practice

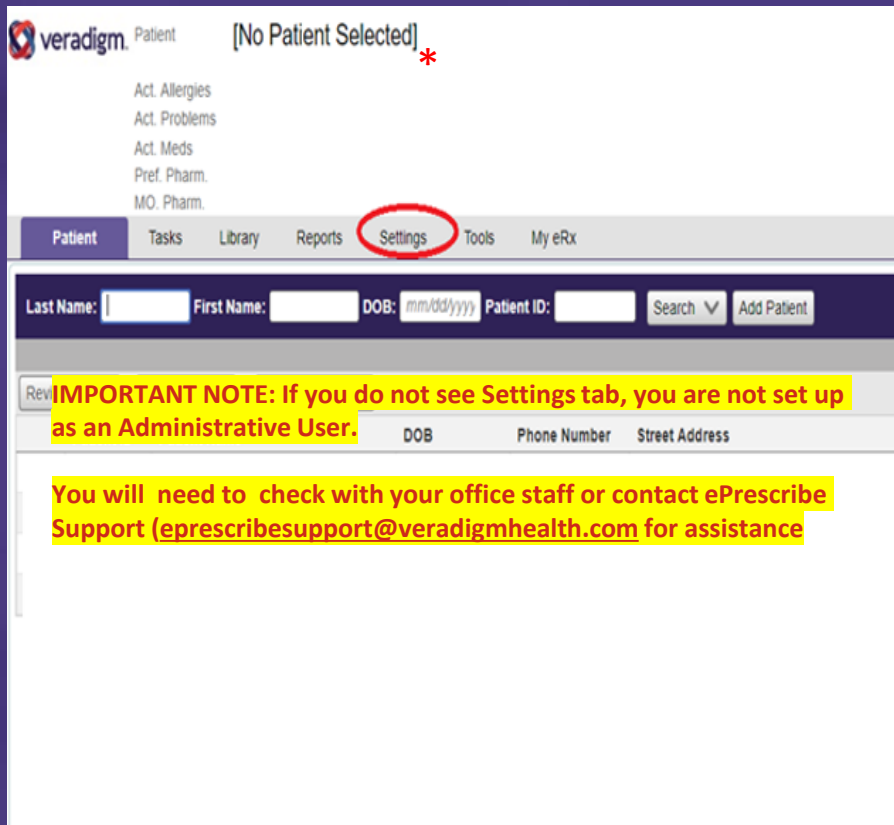
## **Step 4:** Grant Approval for EPCS Access (Provider)

- Grant final EPCS Signing permission

# Step 1 – Enable EPCS privileges

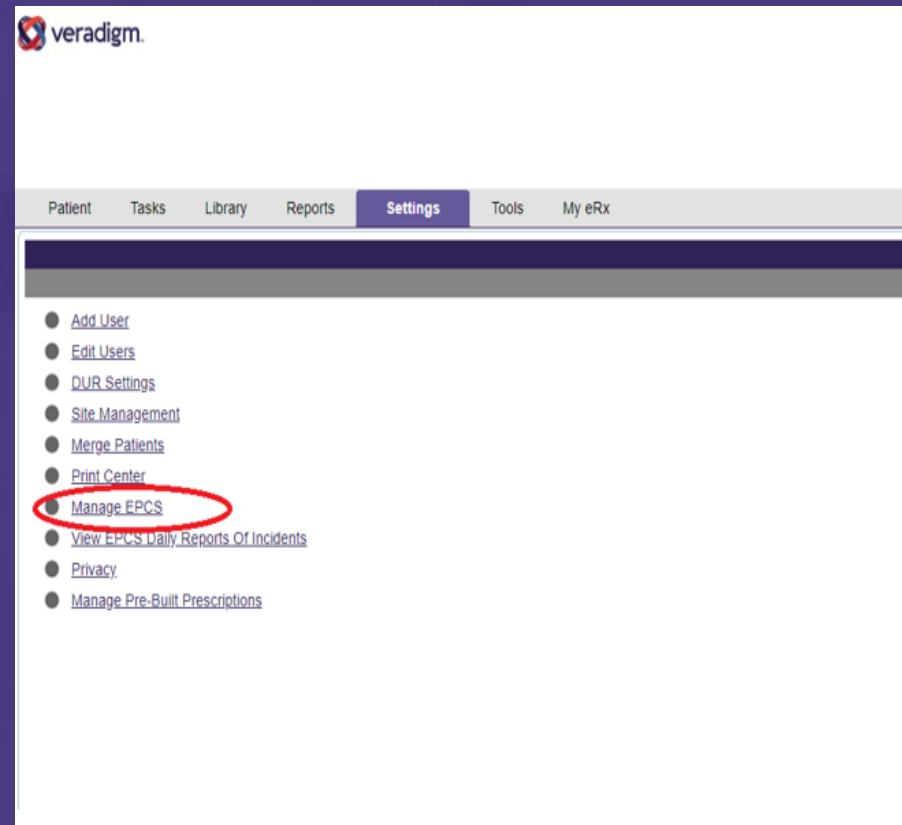
Log into ePrescribe <https://eprescribe.allscripts.com> and follow the steps below to enable the prescribers to begin the EPCS registration:

1 Click on the Settings Tab \*



The screenshot shows the Veradigm ePrescribe interface. At the top, the Veradigm logo is on the left, and "[No Patient Selected]" is on the right. Below the logo, there are links for "Act. Allergies", "Act. Problems", "Act. Meds", "Pref. Pharm.", and "MO. Pharm.". A navigation bar contains tabs for "Patient", "Tasks", "Library", "Reports", "Settings", "Tools", and "My eRx". The "Settings" tab is circled in red. Below the navigation bar, there are input fields for "Last Name:", "First Name:", "DOB: mm/dd/yyyy", and "Patient ID:", followed by "Search" and "Add Patient" buttons. A yellow banner with black text reads: "IMPORTANT NOTE: If you do not see Settings tab, you are not set up as an Administrative User." Below this, there are columns for "DOB", "Phone Number", and "Street Address". At the bottom, another yellow banner with black text reads: "You will need to check with your office staff or contact ePrescribe Support ([eprescribesupport@veradigmhealth.com](mailto:eprescribesupport@veradigmhealth.com)) for assistance".

2 Click on the Manage EPCS



The screenshot shows the Veradigm ePrescribe interface with the "Settings" tab selected in the navigation bar. A list of settings options is displayed on the left side of the main content area. The options are: "Add User", "Edit Users", "DUR Settings", "Site Management", "Merge Patients", "Print Center", "Manage EPCS", "View EPCS Daily Reports Of Incidents", "Privacy", and "Manage Pre-Built Prescriptions". The "Manage EPCS" option is circled in red.

# Manage EPCS lists all providers within the practice and their EPCS status.

1. Click on the drop down arrow and select “Grant EPCS Privilege View”
2. Click on the box to the left of the providers name you’re granting access
3. Click on “Grant EPCS Privilege”. (The providers status under EPCS Privilege Granted will now show as True)
4. When the provider logs back into ePrescribe they will see the link Start EPCS Registration to begin the process.

The image displays two screenshots from the ePrescribe system. The top screenshot shows the 'Registration of Electronic Providers for EPCS' page. It features a dropdown menu with 'Grant EPCS Privilege - View' selected (circled in red and labeled 1). Below this is a 'Grant EPCS Privilege' button (labeled 3). A table lists providers, with the first row for 'Demo Sales' having a checkbox selected (labeled 2) and an 'EPCS Privilege Granted' column set to 'False' (circled in red). The bottom screenshot shows the provider's home screen. It includes a search bar, a 'URGENT MESSAGE' banner, and a 'Start EPCS Registration' button (circled in red and labeled 4) in the right-hand sidebar.

	Last Name	First Name	DEA Number	DEA Registrant	EPCS Suspended	EPCS Privilege Granted
<input checked="" type="checkbox"/>	Demo	Sales	AQ1234563	True	False	False

▲ Patient ID	Patient Name	DOB	Phone Number	Street Address
No Patients Checked In				

# Step 2 – EPCS ID.me Registration

## Overview of process

- Creating your ID.me Account
- Setting up your second factor authentication
- Verifying your identity
- Grant of approver and EPCS access

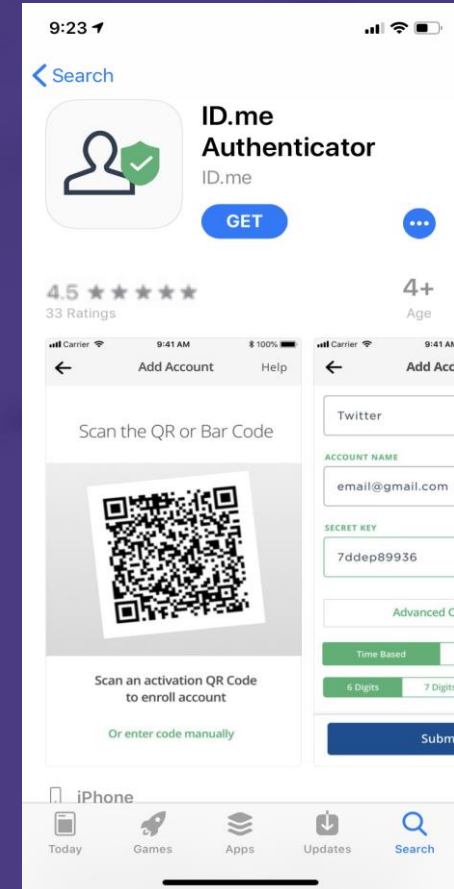
## Before You Begin:

- **Install the App:** First download and install the **ID.me Authenticator** app from the application store associated with your smart phone (Apple Store or Google Play).
- Your smart phone\* (or tablet) must have a functioning camera and browser that can receive text messages
- You **will need** the following :
  1. Your ePrescribe User ID and Password
  2. Your individual email address (group/shared emails are NOT allowed)
  3. Either your Drivers License or Passport
  4. Your Social Security Number


\*

This must be the same device you will always use to generate the passcodes when prescribing controlled substances.


## ID.me Authenticator App



# Sign in to create your Allscripts security account

As described on page 5 ... after the you click on the “Start EPCS Registration” link,  you will next see the login for Allscripts CSP Management.

- 1 Enter your ePrescribe User Name and Password and click Login.

 Allscripts<sup>®</sup>

Security Account Login

Username

Username is Required


Password

Password is Required

Forgot Password ?

Log In

- 2 Once logged in, click on the  button


 Allscripts<sup>®</sup>

CSP Accounts

CSP Name	CSP Account Name	CSP Account ObjectID	CSP Account LOA	Management Site
ID.me	d8dbb6d2737c487b928da017d620b9b3	560eb6ab-8dff-4693-a753-37f686b9da1c	Level of Assurance 3	None
<div>Connect to ID.me</div>				

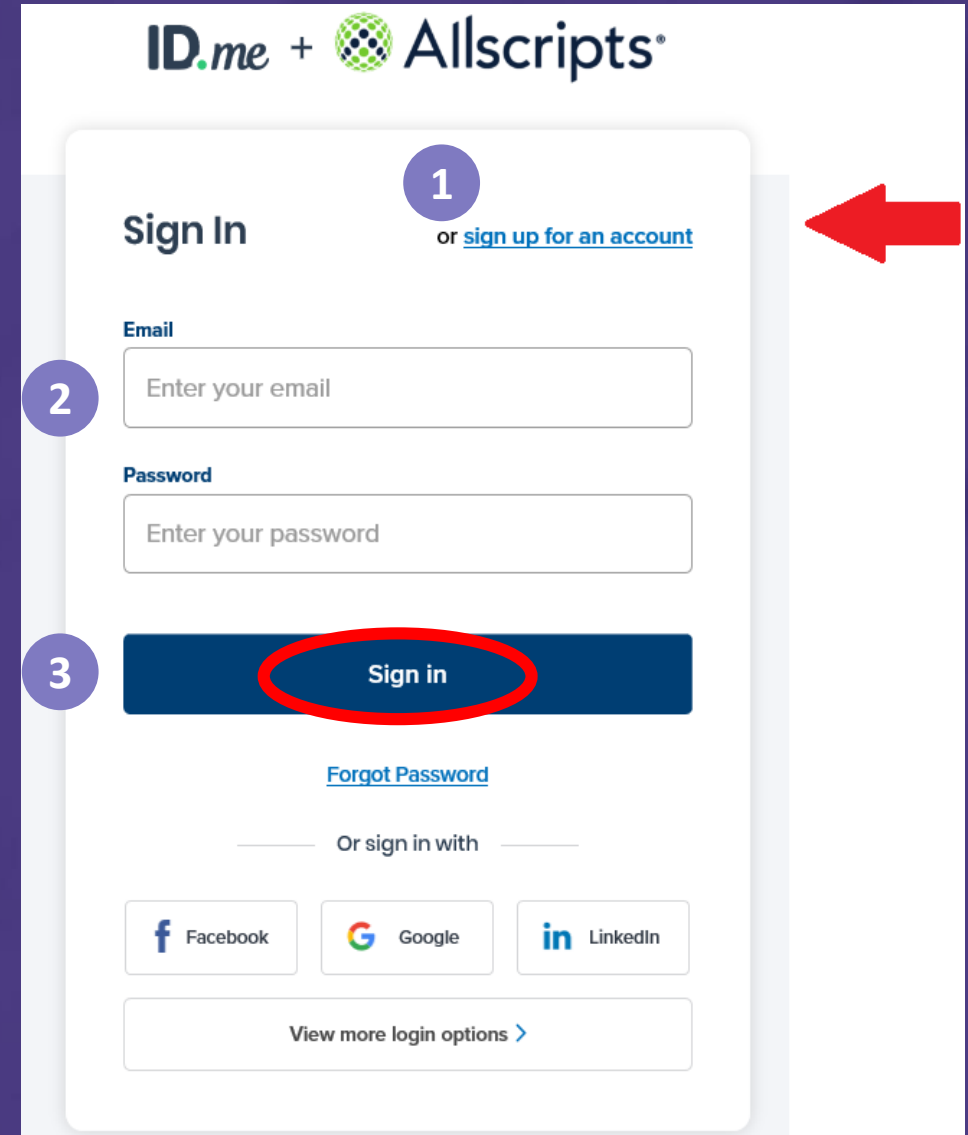


# Create your ID.me Account

After clicking on the  button, a new tab will open in your desktop browser next to the ePrescribe tab with the **ID.me Setup Workflow**.

- 1 Click “Sign Up for an account” to create your ID.me Account
- 2 Enter your individual email address and create a \*password to sign up for an ID.me account. Remember ...
  - Group or shared emails are not allowed
  - Your email address will be your username to log into ID.me
- 3 After clicking on the Sign Up button you will receive 2 emails from ID.me:
  - one welcoming you to ID.me and
  - one to confirm your email address

\* Passwords must be at least 8 characters upper & lower, number and special characters allowed



**ID.me + Allscripts®**

**Sign In** 1 or [sign up for an account](#)

**Email**

2 Enter your email




**Password**

Enter your password

3 **Sign in**

[Forgot Password](#)

Or sign in with

 Facebook  Google  LinkedIn

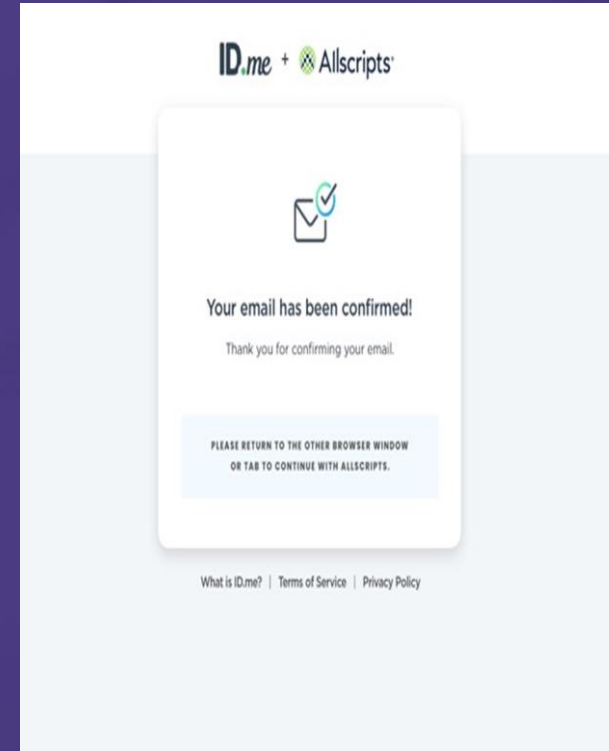
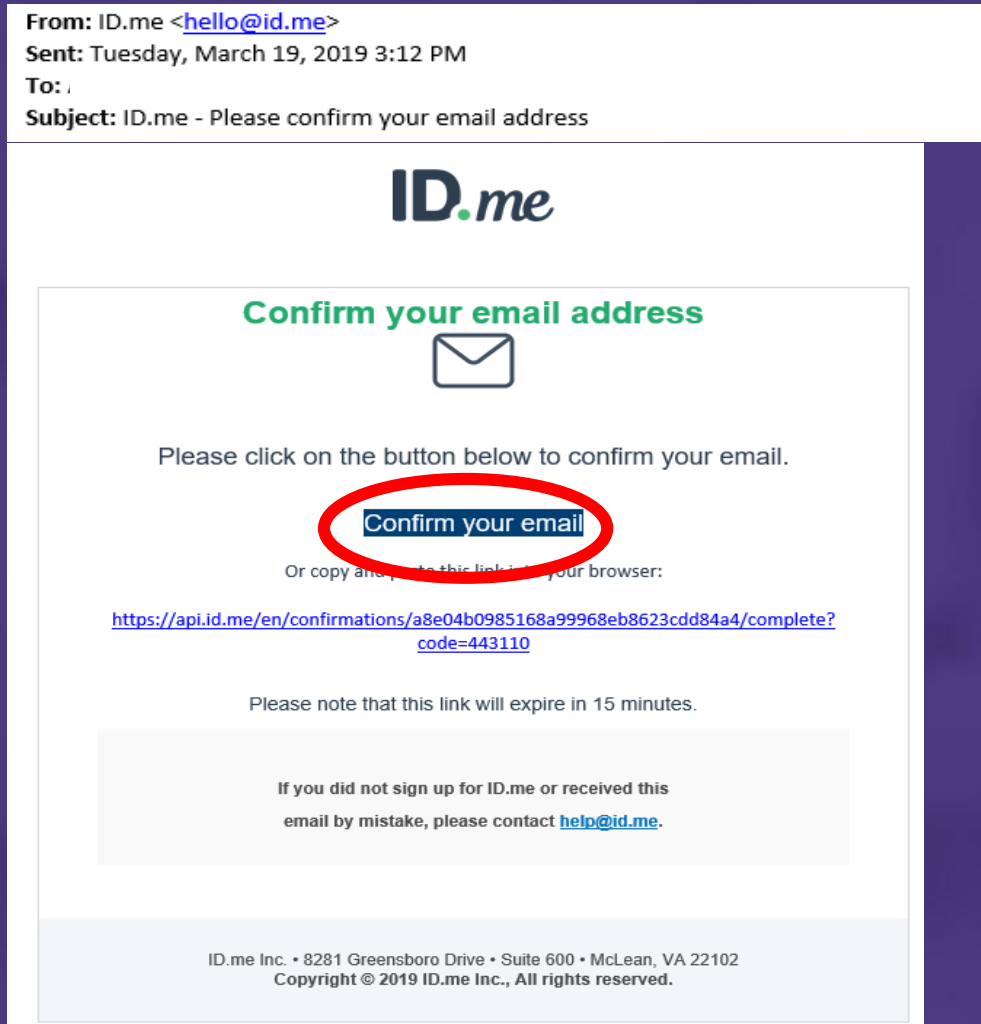
[View more login options >](#)



# Confirm your email

You will receive 2 emails from ID.me, a Welcome email and one to confirm your email.

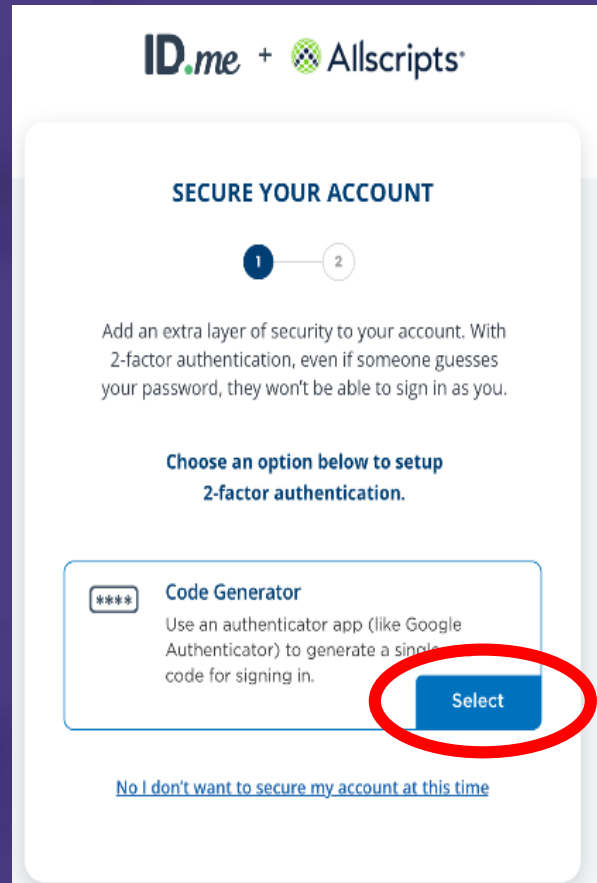
Go to your email (e.g. Outlook) and locate the email from [hello@id.me](mailto:hello@id.me) with the Subject: ID.me - Please confirm your email address



After clicking **Confirm** you will see this response. Return back to your browser to complete the registration

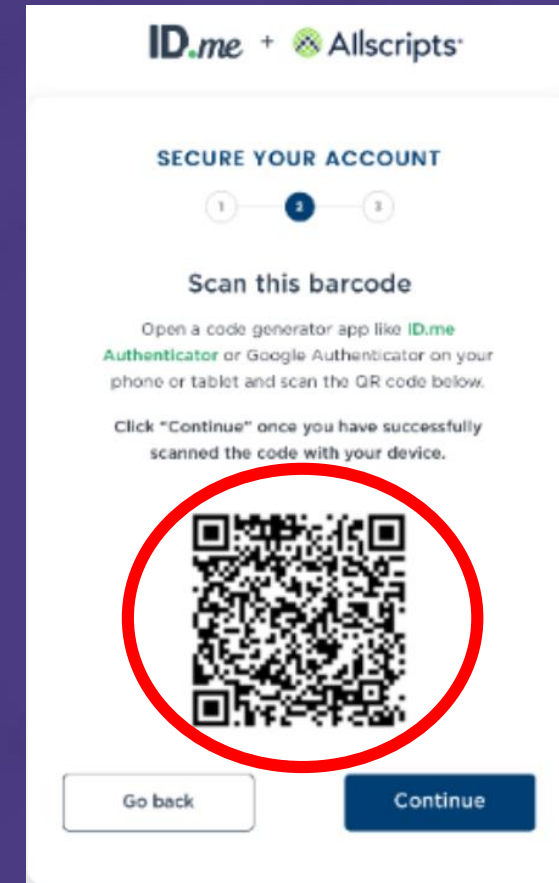
# Setting up the Code Generator

After confirming your email, return to the ID.me Setup workflow in your browser to continue the enrollment to secure your account. Click the **Select** button in the **Code Generator** box. The Code Generator is used for your 2 Factor Authentication passcode for EPCS prescriptions



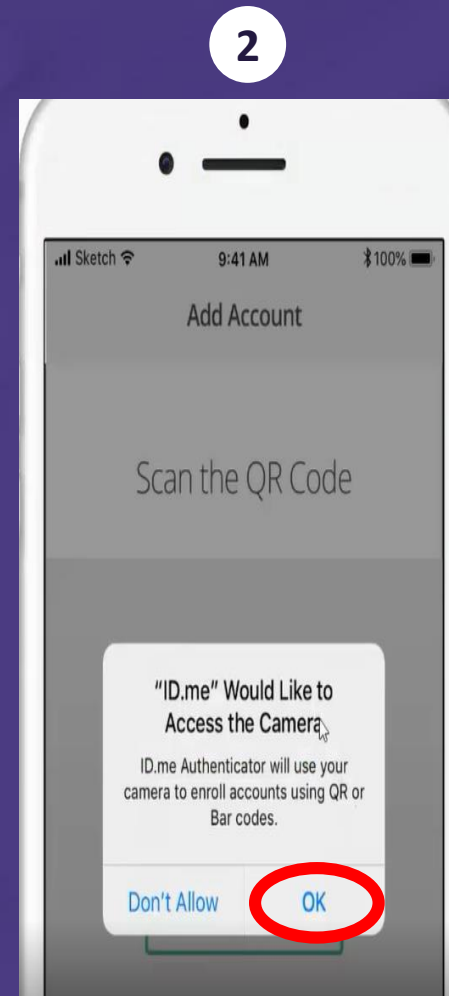
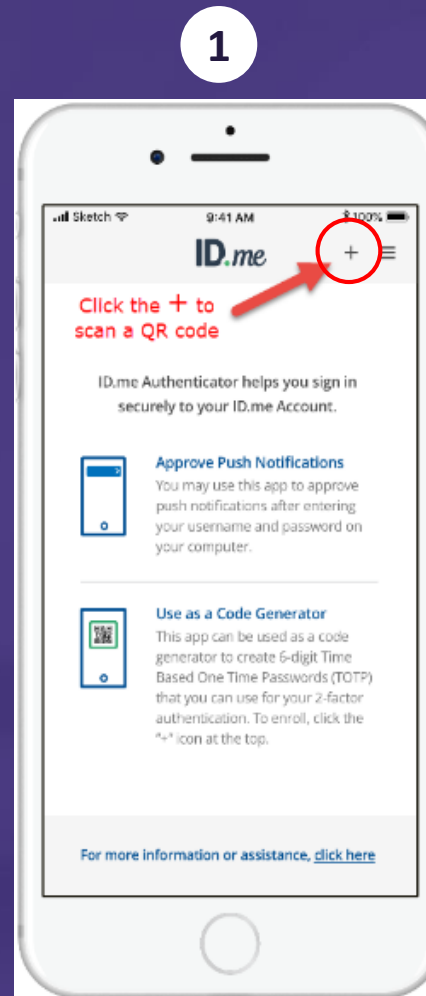
After clicking Select, you will see a QR bar code displayed on the screen

*DO NOT CLICK CONTINUE YET*



# Setting Up Your 2 Factor Authentication

- 1 Open the ID.me app on your smart phone and click the '+' sign in the upper right corner of the screen to scan the QR code
- 2 Click OK to allow ID.me to access your phone's camera
- 3 Position the phone over the QR code on enrollment screen.
  - As soon as the phone is positioned correctly the app will grab the code

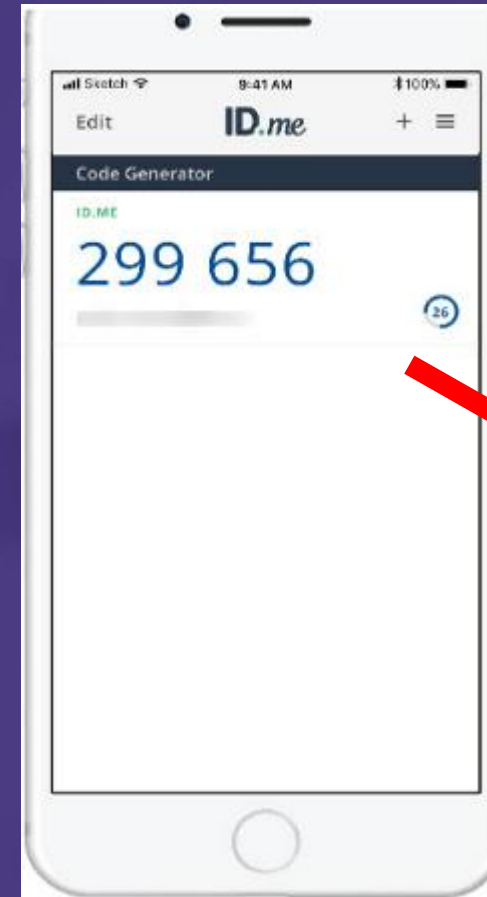


# Confirm Your Device

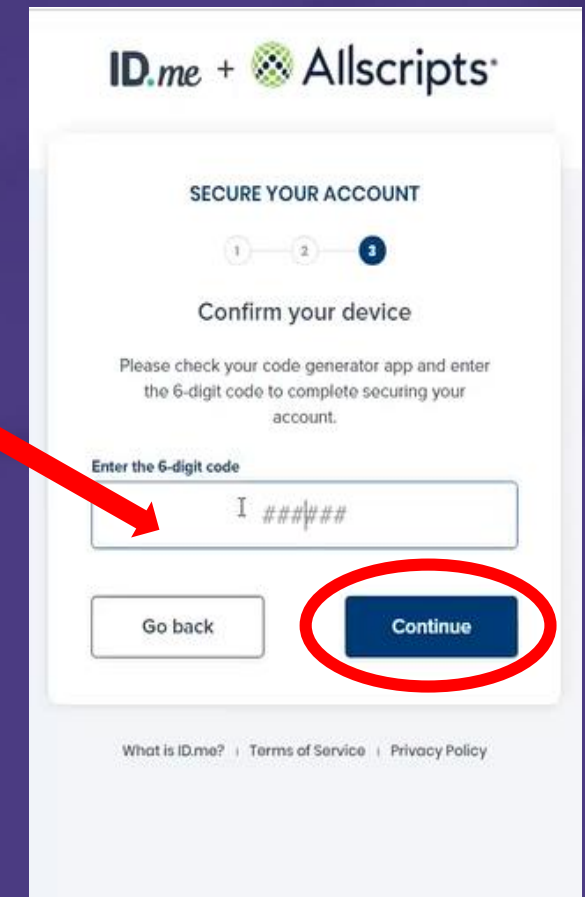
- After capturing the QR code, the ID.me app will generate a 6 digit code to be used to confirm your phone/tablet
- Return to your ID.me Setup workflow on your browser and enter the 6 digit code
- Click **Continue**

**NOTE:** The ID.me code generated will expire in 30 seconds. If you do not enter in correctly, then return to the app to get the new code. (a new code is automatically generated every 30 seconds)

ID.me Authenticator App  
on your phone

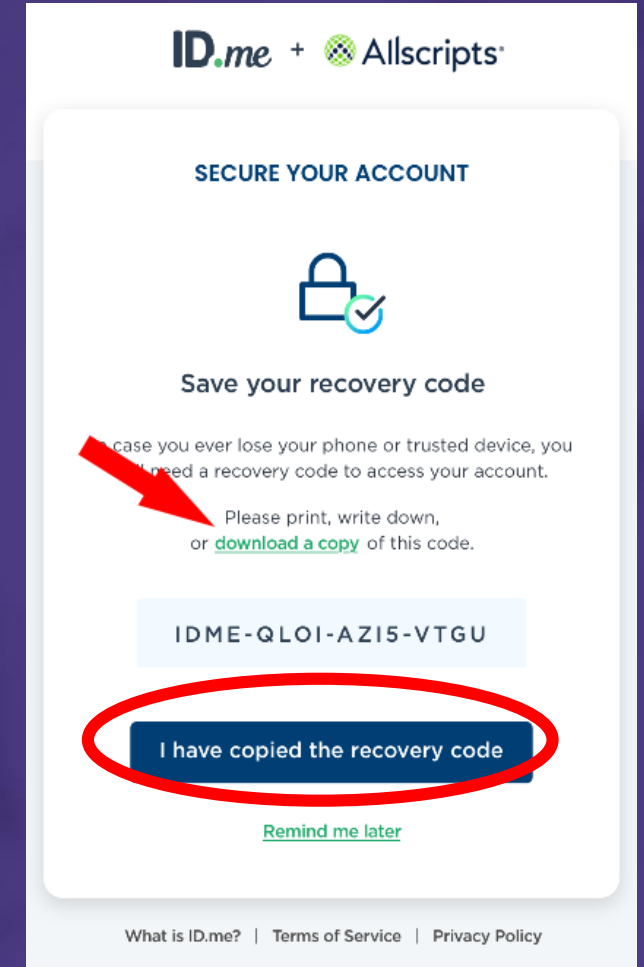
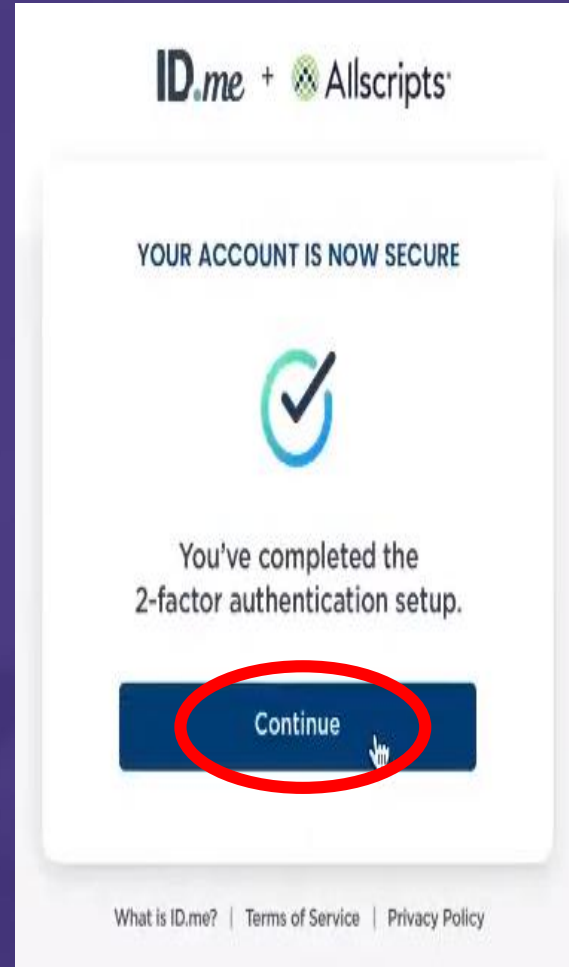


ID.me Setup  
in your browser




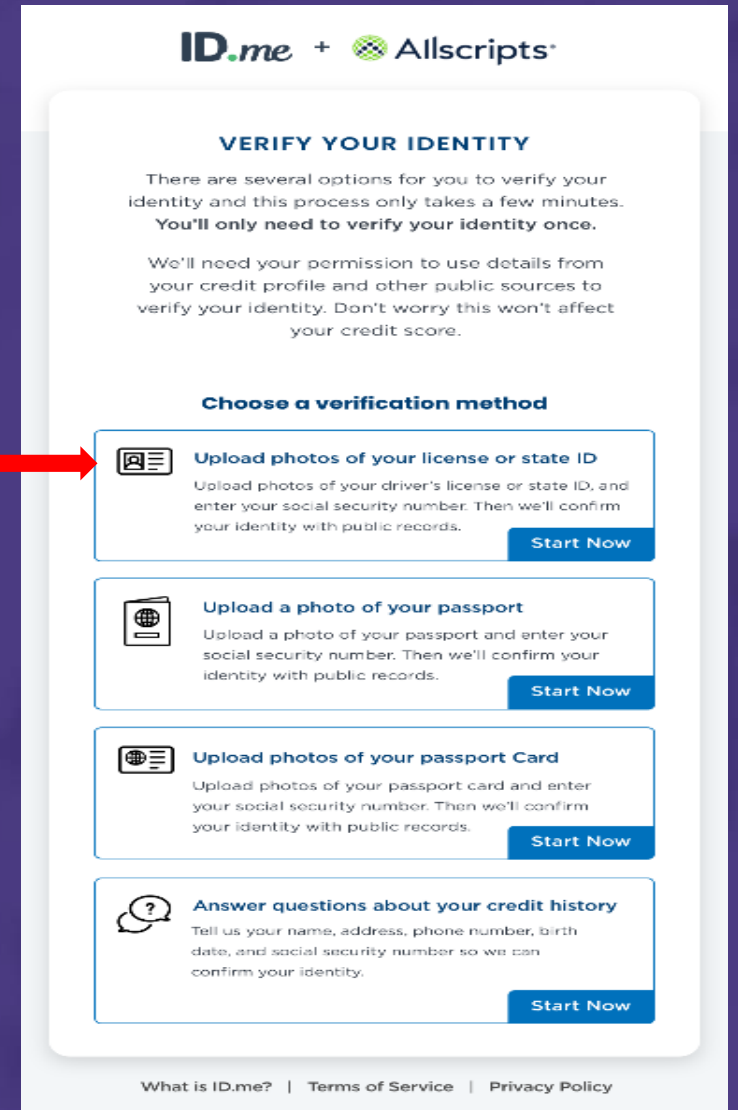
# Recovery Code

- Your account is now secure
- Click ***Continue*** to generate a Recovery Code
- **IMPORTANT:** Either print out, write down or download and save the recovery code in a “safe place”. You will need this code to access ID.me if you change or lose your phone
- Click ***I have copied the recovery code***



# Start Identity Proofing Process

- From the ID.me Setup on your browser, click **Continue**
- Select one of these methods for verifying your identity
  - Upload photos of your license or state ID (recommended)
  - Upload a photo of your passport
  - Upload photos of your passport Card
  - Answer questions about your credit history
- Click the  button for the method you prefer











**ID.me + Allscripts**

### VERIFY YOUR IDENTITY

There are several options for you to verify your identity and this process only takes a few minutes. You'll only need to verify your identity once.

We'll need your permission to use details from your credit profile and other public sources to verify your identity. Don't worry this won't affect your credit score.

#### Choose a verification method

-  **Upload photos of your license or state ID**  
Upload photos of your driver's license or state ID, and enter your social security number. Then we'll confirm your identity with public records. 
-  **Upload a photo of your passport**  
Upload a photo of your passport and enter your social security number. Then we'll confirm your identity with public records. 
-  **Upload photos of your passport Card**  
Upload photos of your passport card and enter your social security number. Then we'll confirm your identity with public records. 
-  **Answer questions about your credit history**  
Tell us your name, address, phone number, birth date, and social security number so we can confirm your identity. 

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

# Verifying your Identity

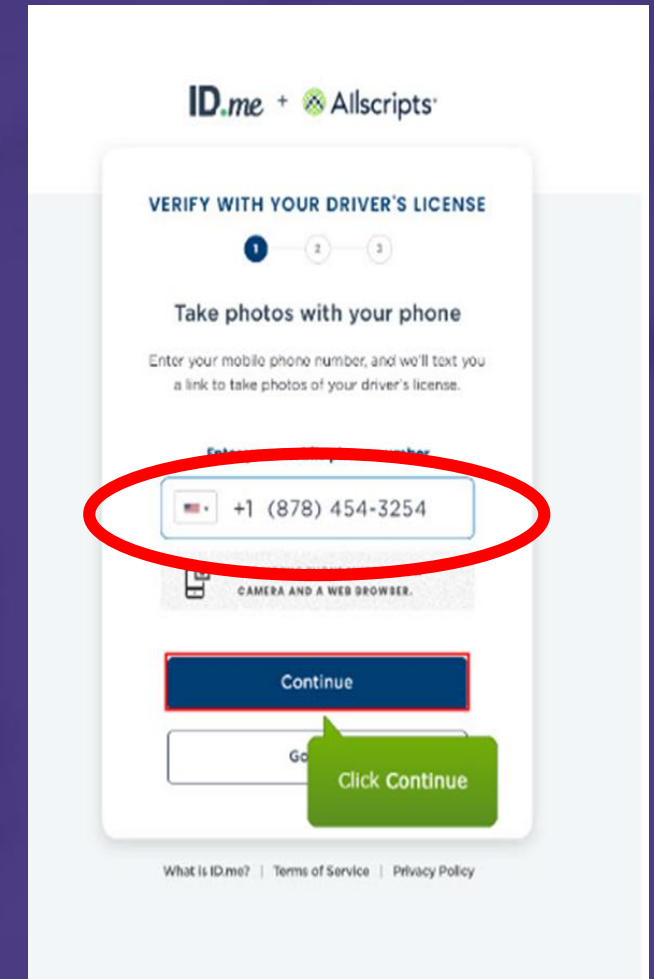
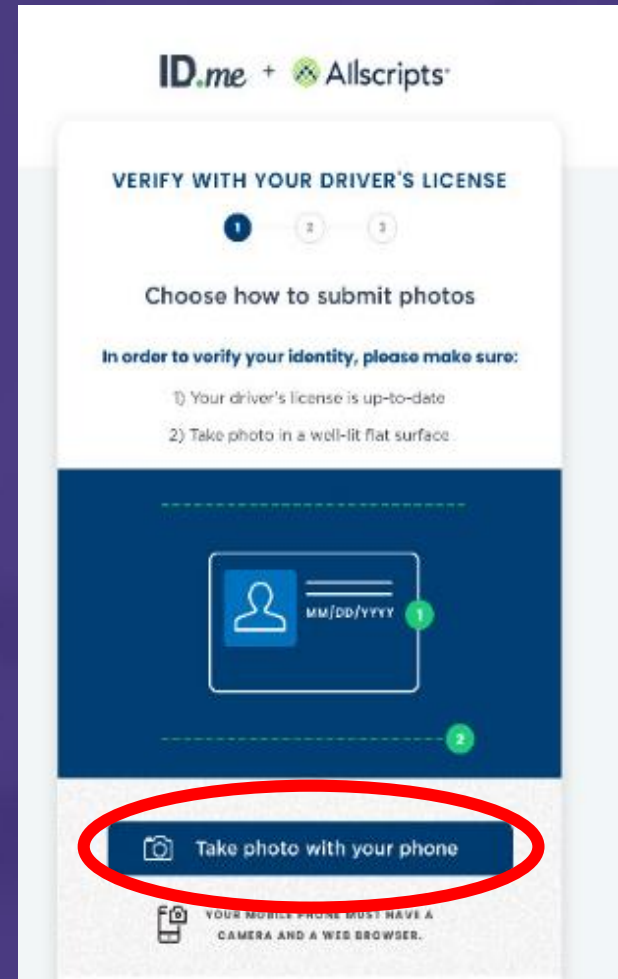
Note: In the following we will take you through the process based on selection of the “Upload photos of your License” verification method (the most popular)

After clicking on the Start Now button next to “Upload photos of your license” method:

- Click ***Take photo with your phone***

Note:

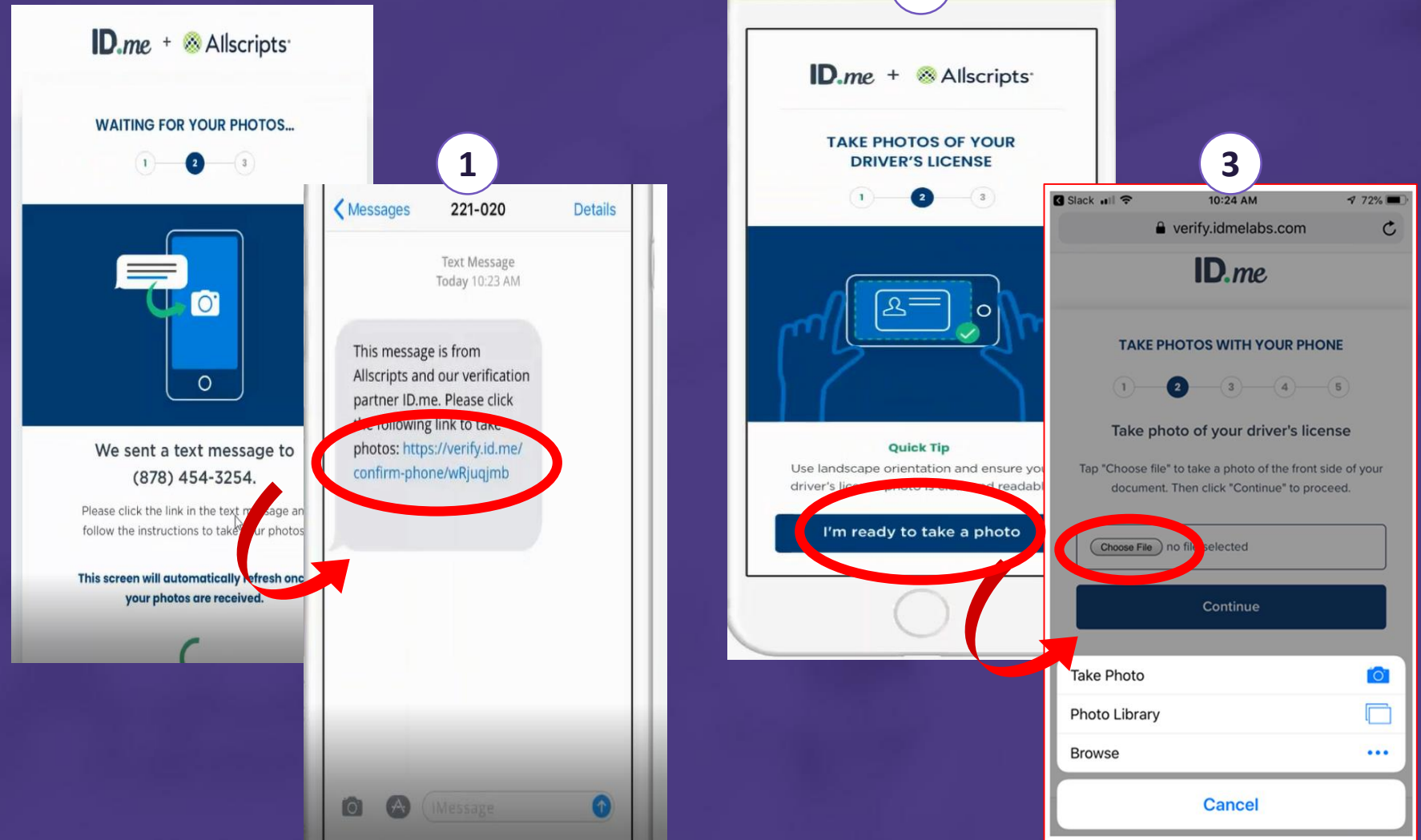
1. You will need a mobile device that can receive text messages and can be used to upload your photo
  2. The device should be registered in your name
- Enter your mobile phone number and click ***Continue***



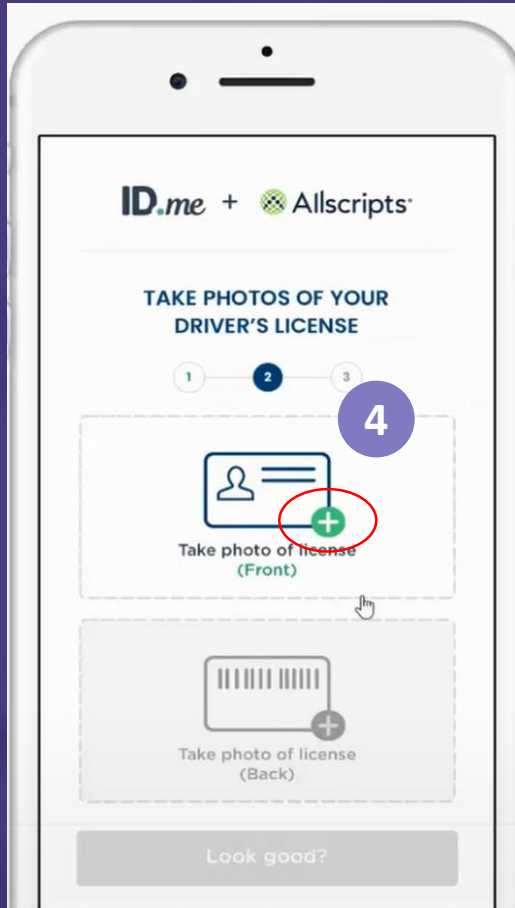


# Taking a photo with your drivers license

- 1 You will receive a text message with a link that will allow you to take photos of your ID
  - Click on that link within the text message
- 2 Once you Click ***I'm ready to take a photo***
- 3 Select **Choose File** which will open your smartphone camera.

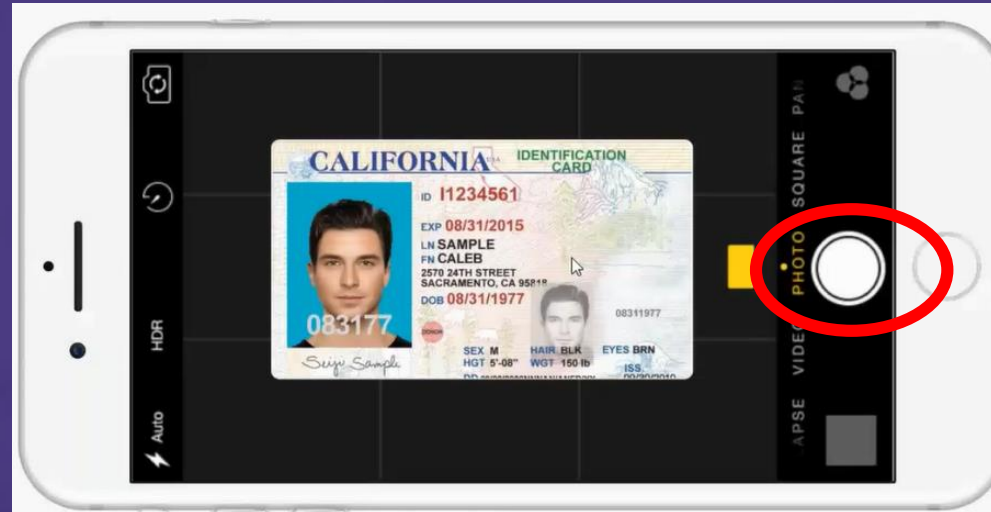


# Taking a photo of your Driver's License



4 Click the “+” sign *Take photo of license (Front)*

- Then take a picture of the front of your license or state ID using the camera on your smart device



# Taking a photo of your Driver's License

- 5 Click *Continue with this photo*
- 6 Click the “+” *Take photo of license (Back)*

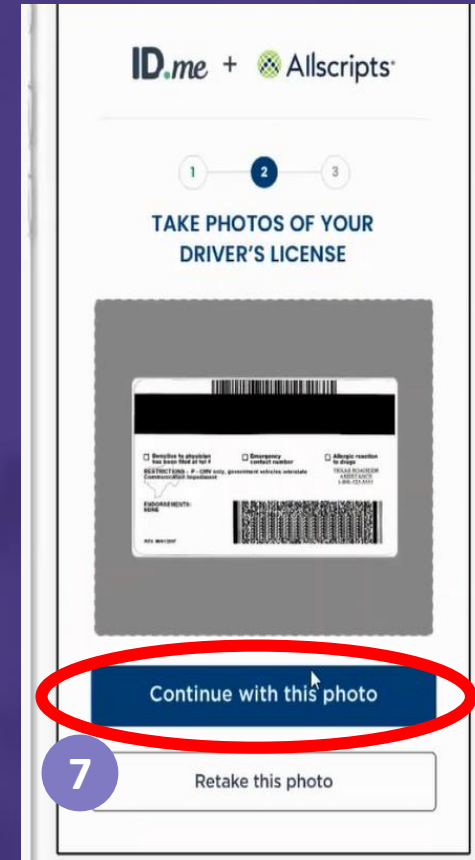


# Verify your photo

Take a picture of the back of your license using your smart device camera



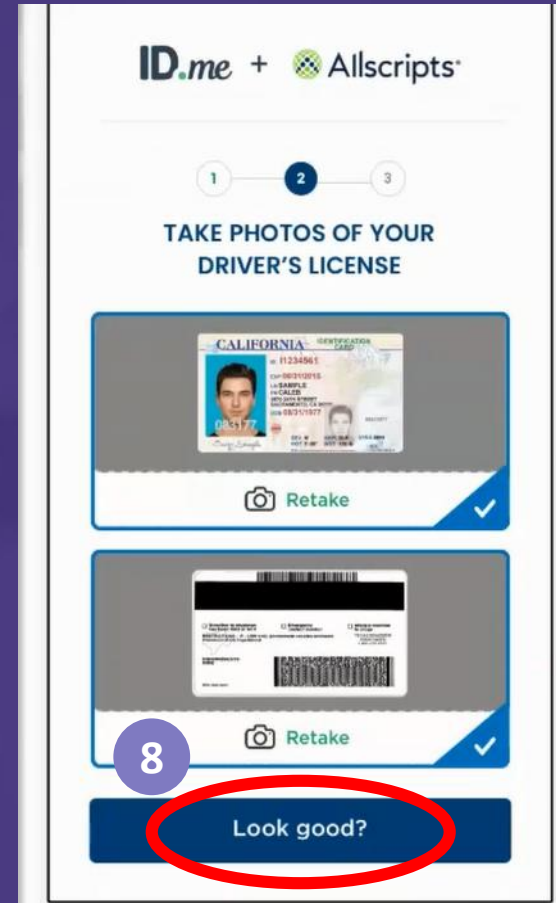
7 Click the *Continue with this photo* button



# Verifying your Identity

- 8 Verify that your photos are clearly displayed on your smart device, and then click **Look good?**
- 9 You will get confirmation that your license or state ID is uploaded

Now return to the ID.me Setup workflow on your browser for the final steps in the verification process!




# Enter Your SSN and Link ID.me account to Allscripts Security Account

- 10 In the ID.me Setup on your browser, enter your **social security number**, and then click **Continue**.

Confirm your information on the next screen and then

- 11 Select *Fair Credit Reporting Act (FCRA)* check box

- 12 Click **Continue**



ENTER YOUR SOCIAL SECURITY NUMBER

Your Social Security Number is needed to verify your identity. We will never reveal your personal information without your permission.

**Social Security Number**

###-##-####

10

Continue

Go back

What is ID.me? | Terms of Service | Privacy Policy

Gender Male

Birth date 08/30/1972

Current home address EDIT

Street address 123 Main Avenue Southwest

City AnyCityName

State CA

Zip code 11111

Phone EDIT

11

Mobile phone number (123) 456-7890

☒ I attest that the information I have provided is correct and accept the use of Fair Credit Reporting Act data to verify my identity.

What is the Federal Fair Credit Reporting Act? ^

We'll need your permission to see information in your credit profile as part of our verification process. The Federal Fair Credit Reporting Act (FCRA) promotes the accuracy, fairness, and privacy of information from consumer reporting agencies.

[Learn more about the FCRA.](#)

[Close](#)

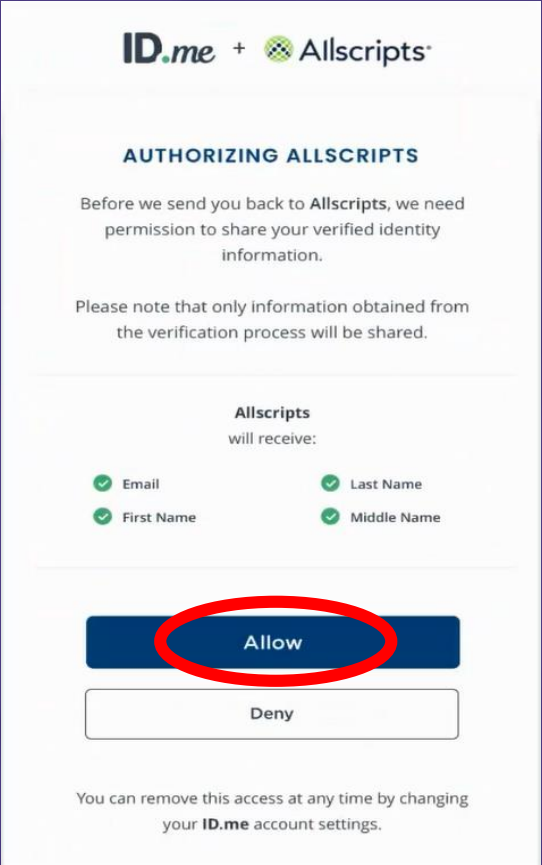
12

Back

Continue

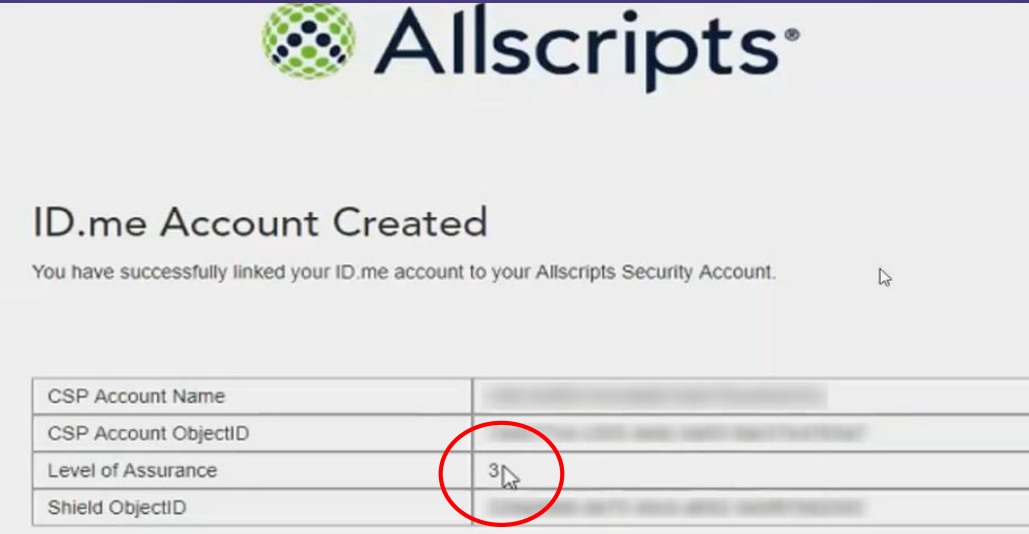


# Verification Process Completion



After you follow the authentication steps, you must then link your ID.me account to your Allscripts Security Account to complete the enrollment process. Click **Allow**.

You will be navigated back to the CSP management screen. Your ID.me account has been assured at a level 3 and has successfully linked to your Allscripts account.





# Step 3 - Granting EPCS Approver Status

Step 3 is where you have the ability to grant the provider(s) Approver privileges. You have the ability to grant other providers within the account to be approve EPCS signing privileges for other physicians within the practice. If a solo provider account, you must grant EPCS Approver status to yourself to move on to the next and final step.

1. Log back into ePrescribe and click on the **Settings Tab**
2. Click on **Edit Users** which will
3. Click on Edit to the left of the provider you are setting up to edit the **User Profile**
4. Scroll towards the bottom to **EPCS Settings** and click on the **EPCS Approver** box
5. Scroll to the top to **Save** your settings
6. Log out of ePrescribe and back in for the change to take effect

veradigm.

Patient Tasks Library Report **Settings** Tools My eRx

- Add User
- **Edit Users**
- DUR Settings
- Site Management
- Merge Patients
- Print Center
- Manage EPCS
- View EPCS Daily Reports Of Incidents
- Privacy
- Manage Pre-Built Prescriptions

**Edit Users**

Back

Last Name: First Name: test

Login ID Last Name ▲

**Edit** ID.me

Back Save

**User Information**

First Name: \* Test MI: A Last Name: \* ID.me

Login ID: capicella

Work Email: \*

Confirm Email: \*

Other

Staff

**Credentials**

Title: Suffix:

NPI: \* 1234567893

Specialty 1: \* Emergency Medicine

Specialty 2: -- Please pick a Specialty --

**DEA License**

+ Add Additional DEA License

DEA License Number	Expiration Date	DEA Schedule : II	III	IV	V	Default DEA	
AQ1234563	4/25/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete

**State License**

+ Add Additional License

State	License Number	Expiration Date	
CA	123678	08/21/2019	Edit Delete
NJ	123456	12/31/2020	Edit Delete
NY	12345698	01/12/2020	Edit Delete

**User Preferences**

Default Fax Location Site: AED & Site

☒ Show patient Rx insurance price

☒ Allow certain payers to automatically display therapeutic alternatives

☒ Show Rx Cash Price and Discount Offer

☒ Print Discount Offer automatically


**EPCS Settings**

EPCS Permissions: Passed ☒ **EPCS Approver**

# Step 4 – Grant Approval for EPCS Access

Once the EPCS Approver privileges are enabled and the provider logs back into ePrescribe, you now have the ability to grant EPCS Signing privileges to yourself (single provider practice) or you can grant permission to other providers that have completed the ID.me identity registration.

Once logged into ePrescribe, under Urgent Messages, you will see a hyperlink [Manage EPCS Approvals](#) to click on

 Patient

[No Patient Selected]

Act. Allergies

Act. Problems

Act. Meds





Pref. Pharm.

MO. Pharm.

AED & Site

Last Sign In Nov 30, 2018 - 04:01 pm

Valerie Campbell



Patient

Tasks

Library

Reports

Settings

Tools

My eRx

Wolters Kluwer

Search

Last Name:

First Name:

DOB:

Patient ID:

Search

Add Patient

Review History

Select Dx

Select Med

Document Visit

Patient ID	Patient Name	DOB	Phone Number	Street Address
No patients checked in				

PROVIDER NOTICE

CS reports available (24)

EPCS Daily Activity Reports

URGENT MESSAGE

The site has 2 failed Rx messages

Manage EPCS Approvals

After clicking on the **Manage EPCS Approvals** link, a list of the prescribers within the account will display showing their EPCS Status.

1. Click on the drop down arrow and highlight **Approve Providers for EPCS Signing Permission**
2. Click on the box to the left of the provider that you are granting EPCS Privileges to (must be PASSED under EPCS Registration Status)
3. Click on **Approve EPCS Signing Privileges**.
4. **EPCS Signing Granted** will now display as True

Registration of Electronic Providers for EPCS

Back

Show All Providers

Grant EPCS Privilege - View

**Approve Provider for EPCS Signing Permission - View**

Search for Providers by DEA

DEA Registrant	EPCS Suspended	EPCS Privilege Granted	EPCS Registration Status
True	False	True	Passed
True	False	False	Not Registered

Registration of Electronic Providers for EPCS

Back

Show All Providers

**Approve EPCS Signing Privilege**

	Last Name	First Name	DEA Number	DEA Registrant	EPCS Suspended	EPCS Privilege Granted	EPCS Registration Status	<b>EPCS Signing Granted</b>
<input type="checkbox"/>			JM8451178	True	False	True	Passed	True
<input type="checkbox"/>			UY2733168-2598	True	False	False	Not Registered	False

# EPCS Permissions Due Diligence Dialog

Once the provider clicks on **Approve EPCS Signing Privilege**, you will be presented with the Due Diligence Dialog box below

- Review the Due Diligence Dialog
- Check all four boxes listed
- Your ePrescribe Username will be pre-populated just enter in your password
- Enter in the one-time passcode generated from your second factor device \*
- Click Accept and the registration is complete!

**EPCS Permission Due Diligence Dialog**

When you assign EPCS permissions to others, you must confirm a number of items are true.

I certify due diligence to ensure that the selected practitioners are eligible for EPCS as follows:

- ☒ Either State or Federal government identification was used to verify their identity.
- ☒ State authorizations to practice and prescribe controlled substances are current and in good standing.
- ☒ Either DEA registrations are current, or exception has been granted from the requirement of registration under § 1301.22.
- ☒ If the practitioner is working at healthcare facilities operated by the Department of Veterans Affairs as an employee or at a healthcare facility operated by the Department of Veterans Affairs on a contractual basis, pursuant to 38 U.S.C. 8153, the practitioner has been validated for the eligibility to do so under 38 U.S.C. 7401-7408.

User Name

\* Password

Token Device

One Time Password(OTP)

\* If you are registered with both Verizon and ID.me, all devices will list: SMS text, token and Id.me Authenticator

Once the Due Diligence step is completed, providers can send controlled substance prescriptions electronically.

## To confirm that your registration is complete:

1. Log back into ePrescribe and click on the pencil next to your name which brings you to your User Profile
2. Scroll down to EPCS Settings where EPCS Permissions are now ON

The screenshot displays the ePrescribe user profile interface. On the left sidebar, a red banner indicates an 'URGENT MESSAGE' and an orange banner indicates 'ePA Message Action Required'. The main content area shows the user's profile information, including their name 'Volters Klotzer', last sign-in time 'Apr 23, 2019 - 09:23 am', and a 'Test ID.me' link. The 'EPCS Settings' section is highlighted, showing 'EPCS Permissions: On' and 'EPCS Approver' links. A red circle highlights the pencil icon next to the user's name in the top right corner, and another red circle highlights the 'EPCS Permissions: On' status.

**1** AED & Site

Last Sign In Apr 23, 2019 - 09:23 am  
Test ID.me

Volters Klotzer Search

**URGENT MESSAGE**

**ePA Message Action Required**  
You have 1 open ePA task

HELP WITH THIS SCREEN

**Other**  
Staff

**Credentials**  
Title:  Suffix:   
NPI:  1234567893  
Specialty 1:  Emergency Medicine  
Specialty 2:  -- Please pick a Specialty --

**DEA License**  
**Add Additional DEA License**

DEA License Number	Expiration Date	DEA Schedule : II	III	IV	V	Default DEA	Edit	Delete
AQ1234563	4/25/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Delete</a>

**State License**  
**Add Additional License**

State	License Number	Expiration Date	Edit	Delete
CA	123678	08/21/2019	<a href="#">Edit</a>	<a href="#">Delete</a>
NJ	123456	12/31/2020	<a href="#">Edit</a>	<a href="#">Delete</a>
NY	12345698	01/12/2020	<a href="#">Edit</a>	<a href="#">Delete</a>

**User Preferences**  
Default Fax Location Site:  AED & Site

☒ Show patient Rx insurance price  
☒ Allow certain payers to automatically display therapeutic alternatives  
☒ Show Rx Cash Price and Discount Offer  
☒ Print Discount Offer automatically

**EPCS Settings**  
**EPCS Permissions: On** **EPCS Approver** **2**  
EPCS Approver: [Manage EPCS Approvals](#)  
EPCS 2nd Factor Forms: [Manage Second Factor Forms](#)

**Congratulations!**

**You have completed the EPCS Enrollment process**