veradigm™

EPCS On-Boarding Guide

New Provider ID.me Enrollment

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 2nd 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
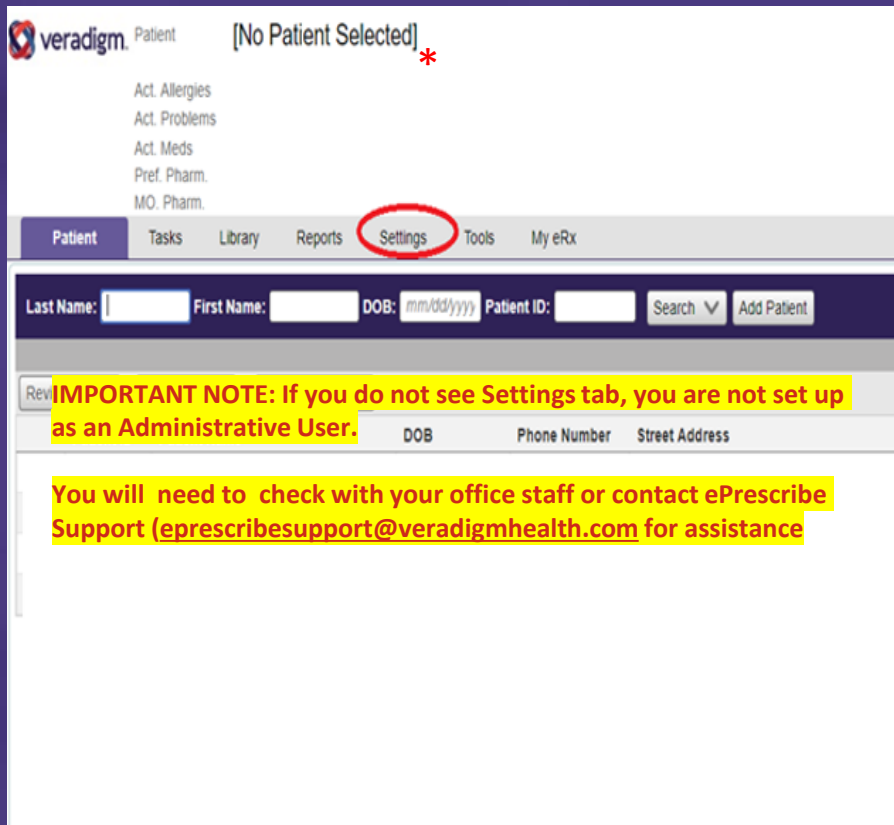
Step 4: Grant Approval for EPCS Access (Provider)
- Grant final EPCS Signing permission

Step 1 – Enable EPCS privileges
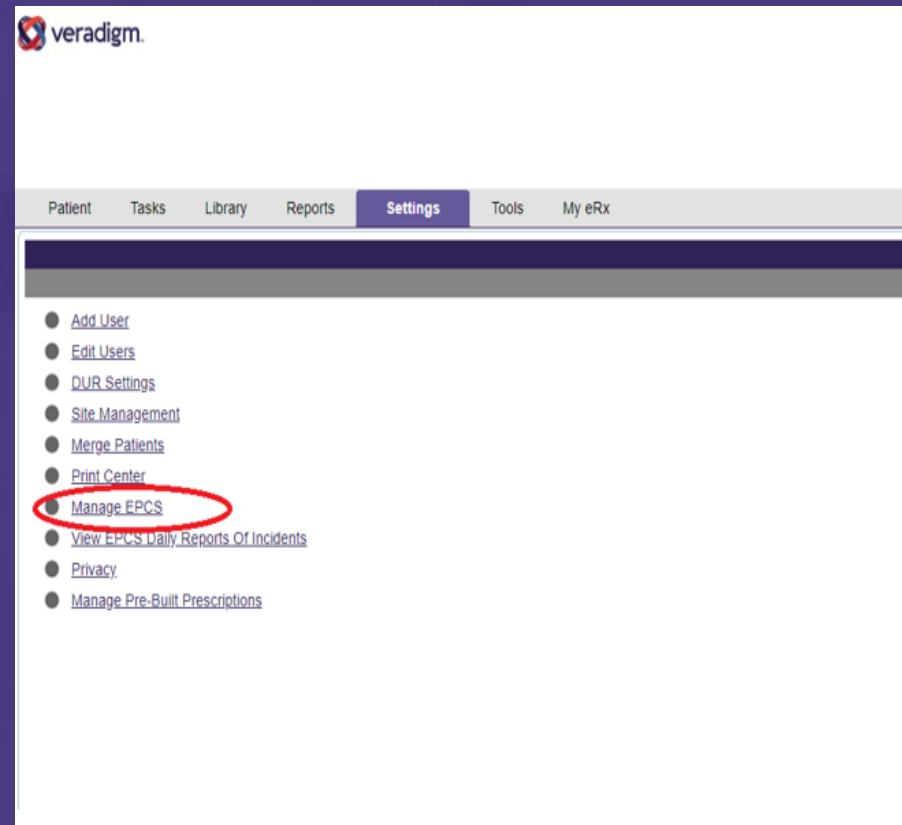
Log into ePrescribe https://eprescribe.allscripts.com and follow the steps below to enable the prescribers to begin the EPCS registration:

1 Click on the Settings Tab*

2 Click on the Manage EPCS

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.

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

ID.me Authenticator App

* This must be the same device you will always use to generate the passcodes when prescribing controlled substances.
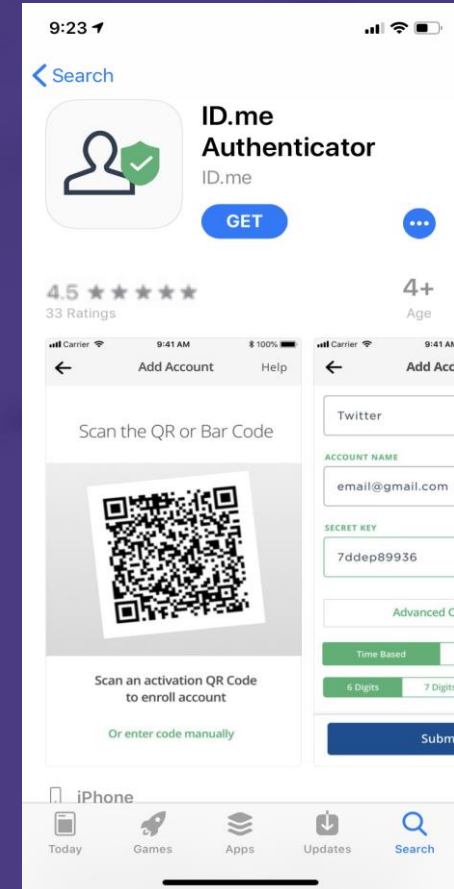
Sign in to create your Allscripts security account

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 <u>ePrescribe</u> User Name and Password and click Login.

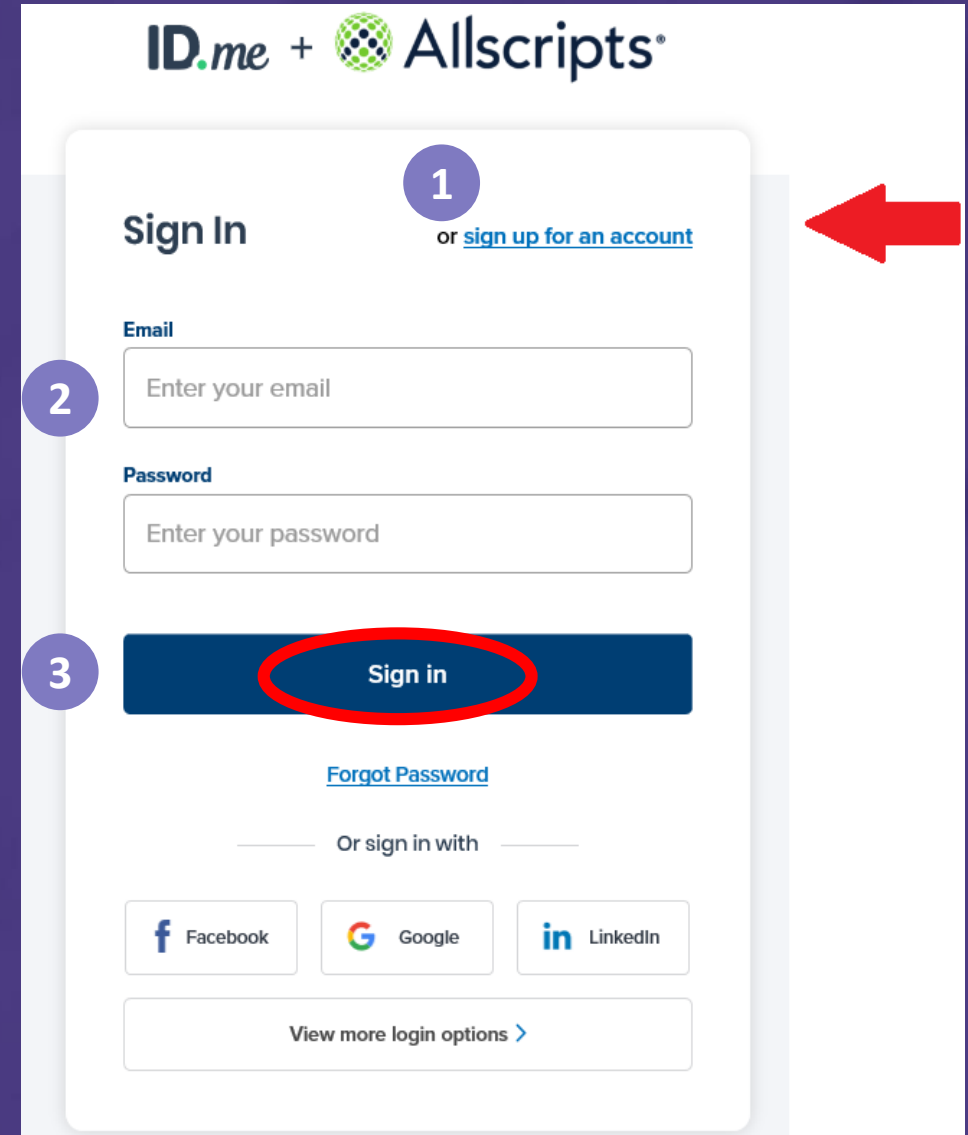
2 Once logged in, click on the Connect to ID.me button

Create your ID.me Account

After clicking on the [Connect to ID.me] 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   or sign up for an account

1

Email

Enter your email   **2**

Password

Enter your password

3   Sign in

Forgot Password

Or sign in with

f Facebook   G Google   in LinkedIn
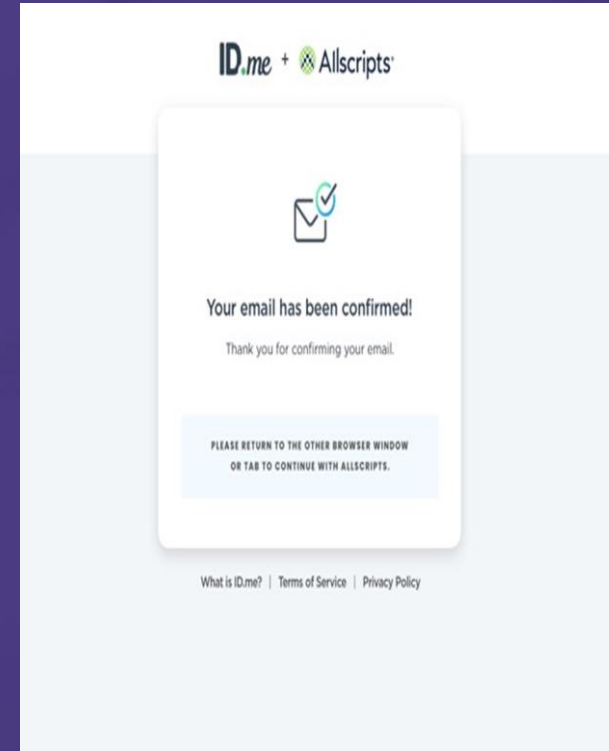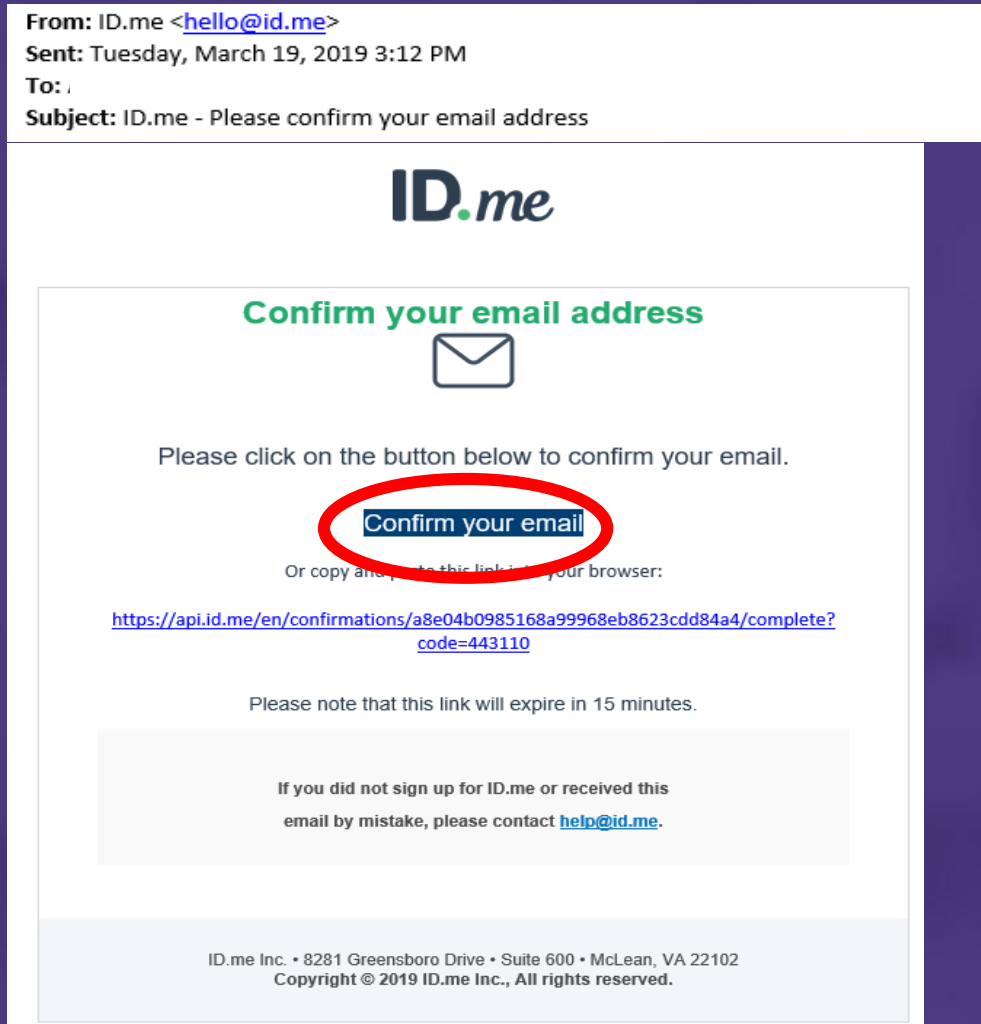
View more login options >

8

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 with the Subject: ID.me - Please confirm your email address

From: ID.me <hello@id.me>
Sent: Tuesday, March 19, 2019 3:12 PM
To:
Subject: ID.me - Please confirm your email address

ID.me

Confirm your email address

Please click on the button below to confirm your email.

Confirm your email

Or copy and paste this link into your browser:

https://api.id.me/en/confirmations/a8e04b0985168a99968eb8623cdd84a4/complete?code=443110

Please note that this link will expire in 15 minutes.

If you did not sign up for ID.me or received this
email by mistake, please contact help@id.me.

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ID.me + Allscripts

Your email has been confirmed!

Thank you for confirming your email.

PLEASE RETURN TO THE OTHER BROWSER WINDOW
OR TAB TO CONTINUE WITH ALLSCRIPTS.

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

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
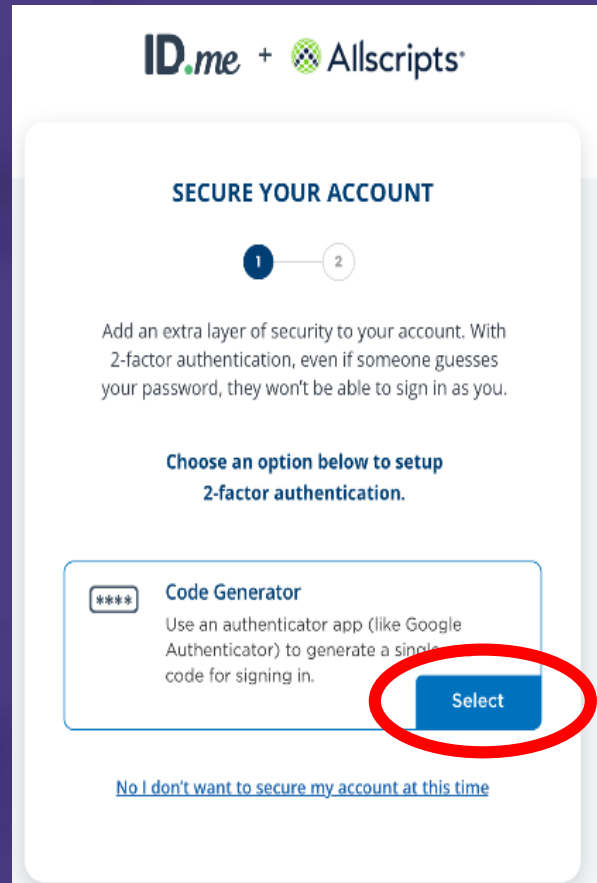

After clicking Select, you will see a QR bar code displayed on the screen

DO NOT CLICK CONTINUE YET
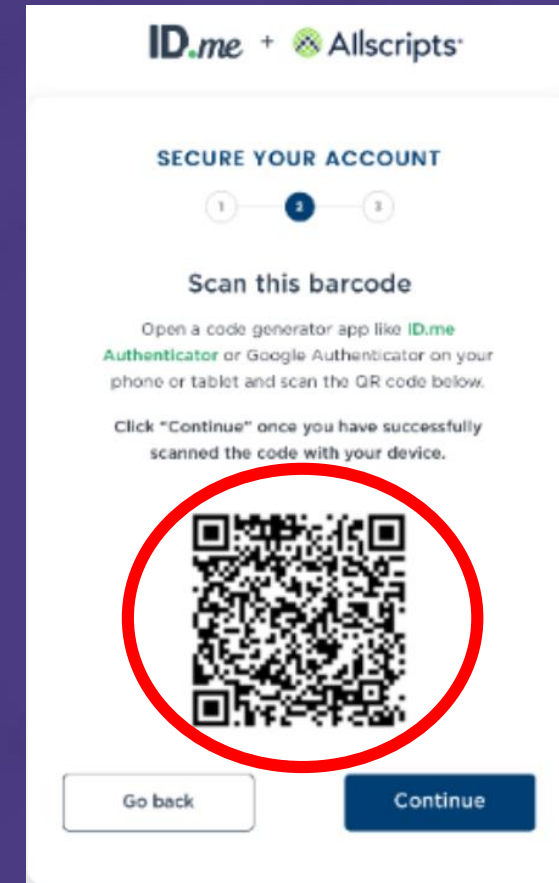
Setting Up Your 2 Factor Authentication

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
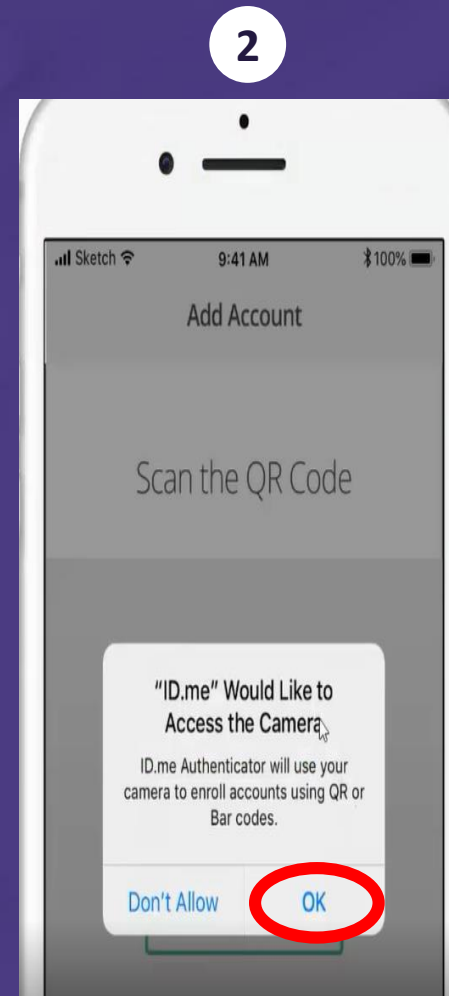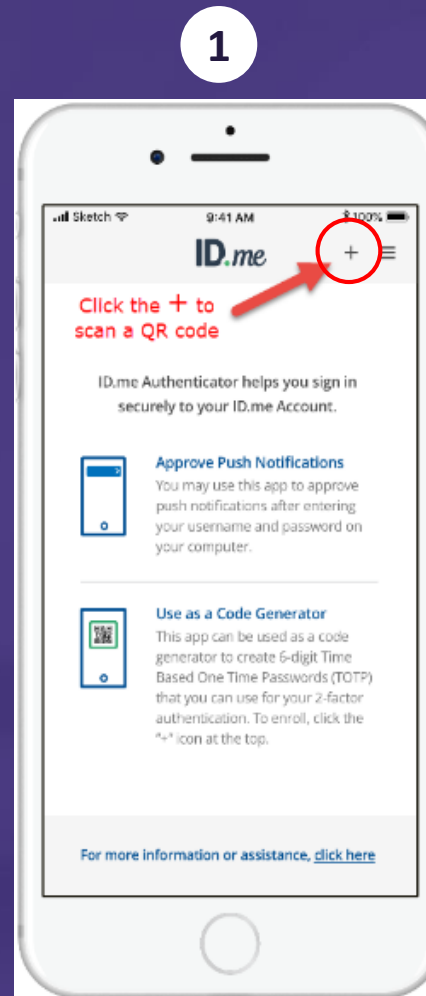
Confirm Your Device

- 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
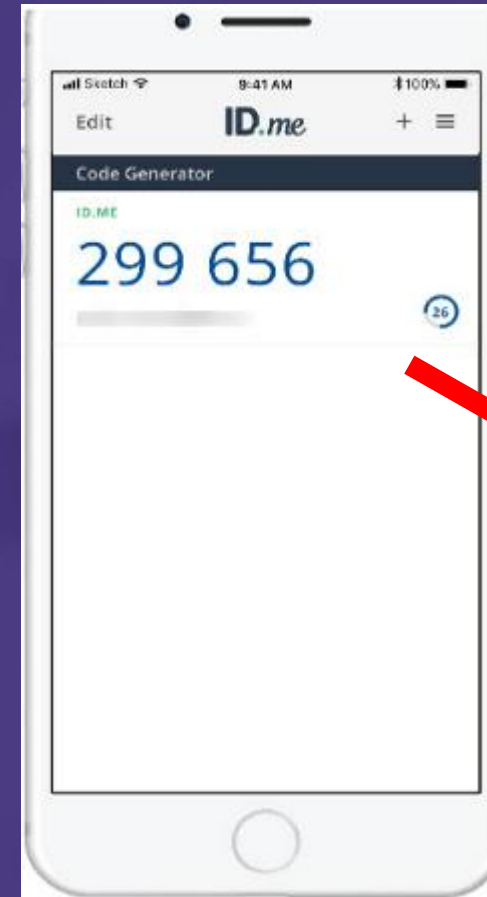
ID.me Setup in your browser
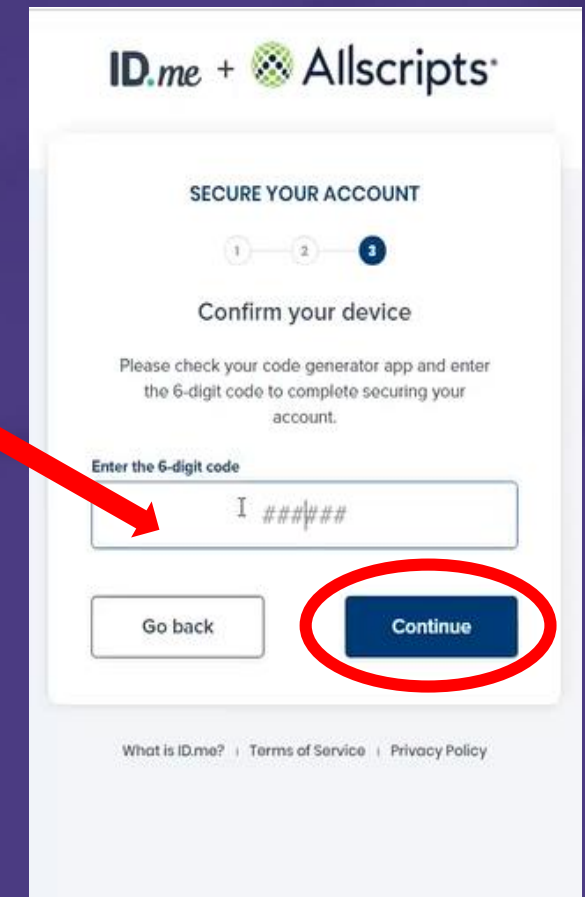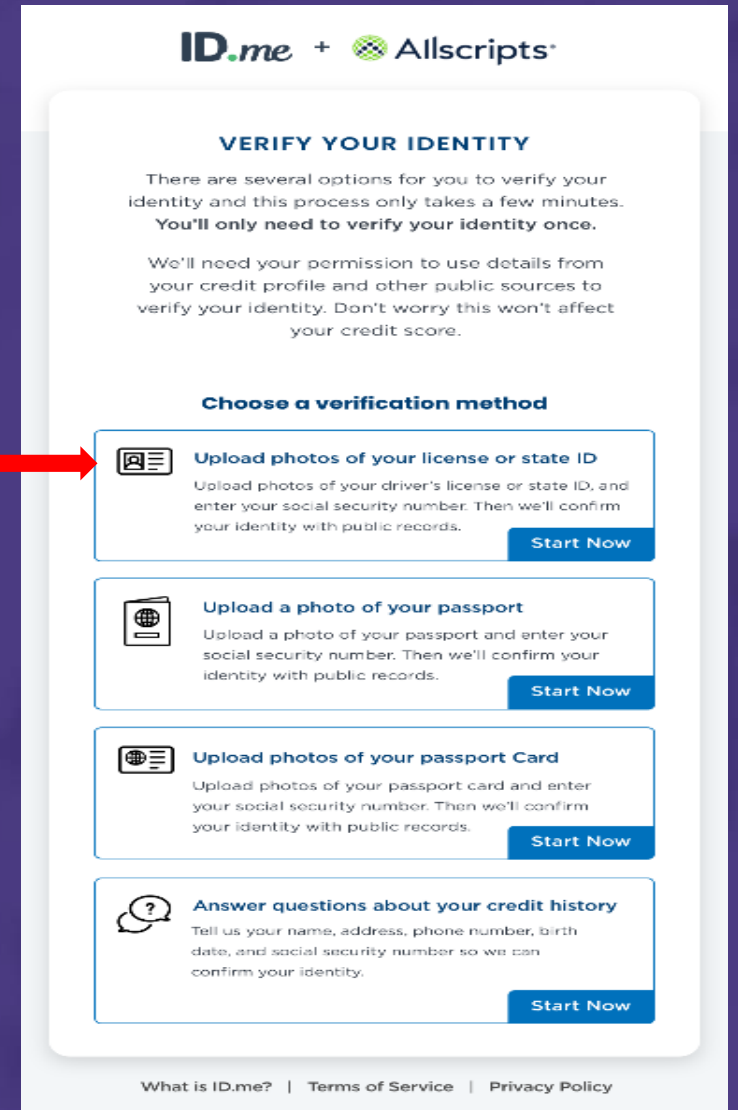
Recovery Code

- 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***
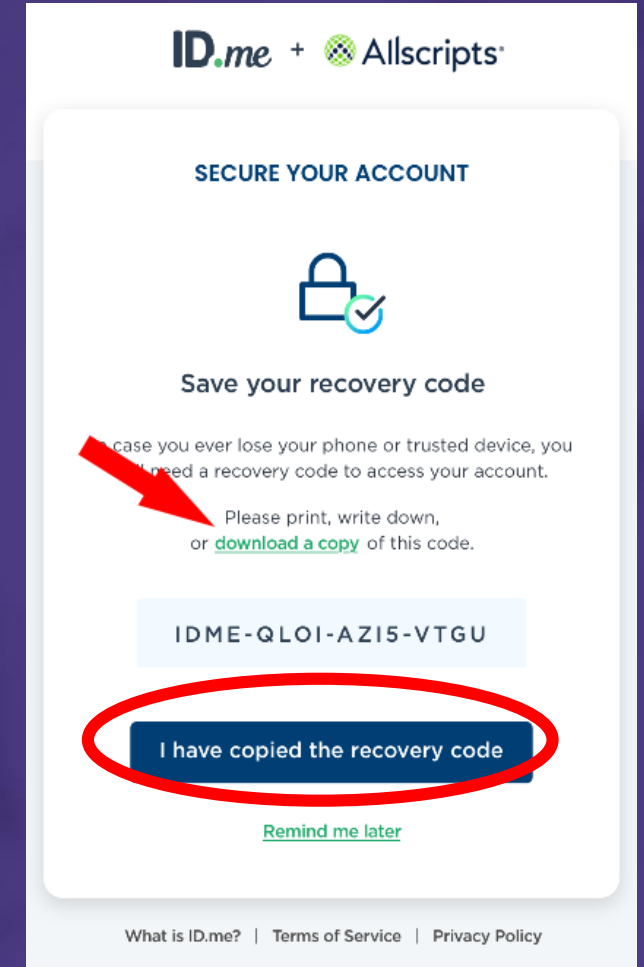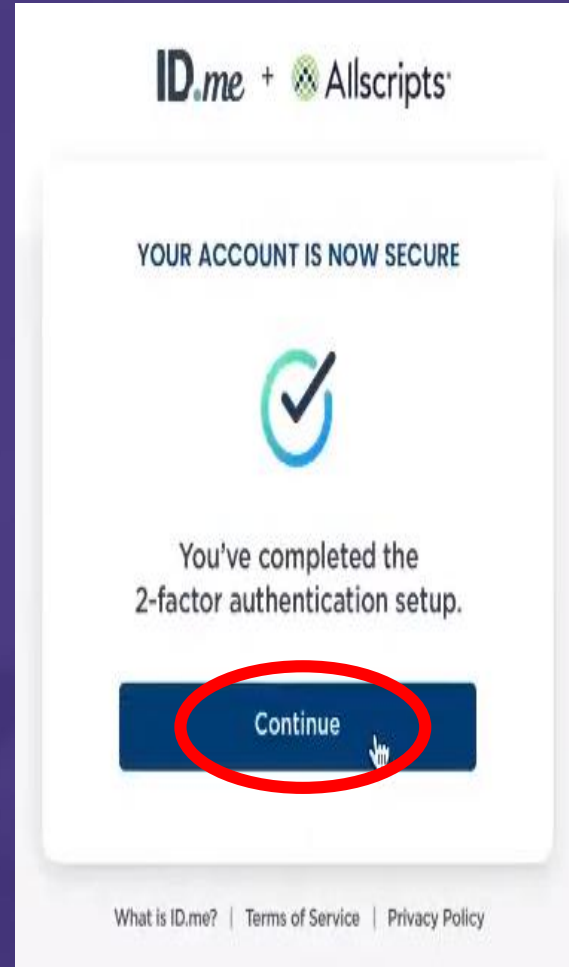
Start Identity Proofing Process

- From the ID.me Setup on your browser, click **Continue**

- Select <u>one</u> 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 **Start Now** button for the method you prefer

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*
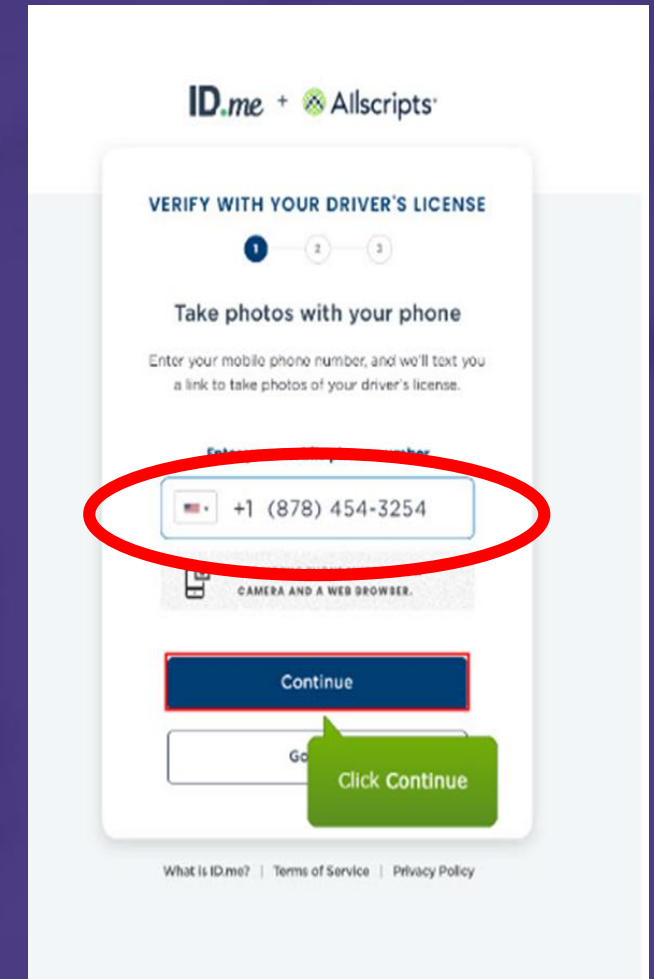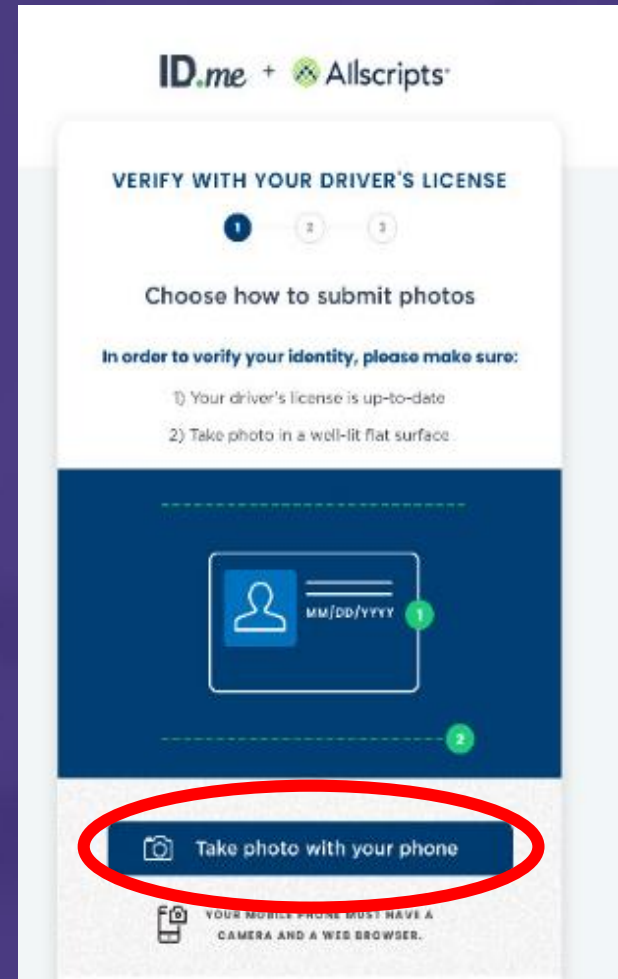
Taking a photo with your drivers license

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*

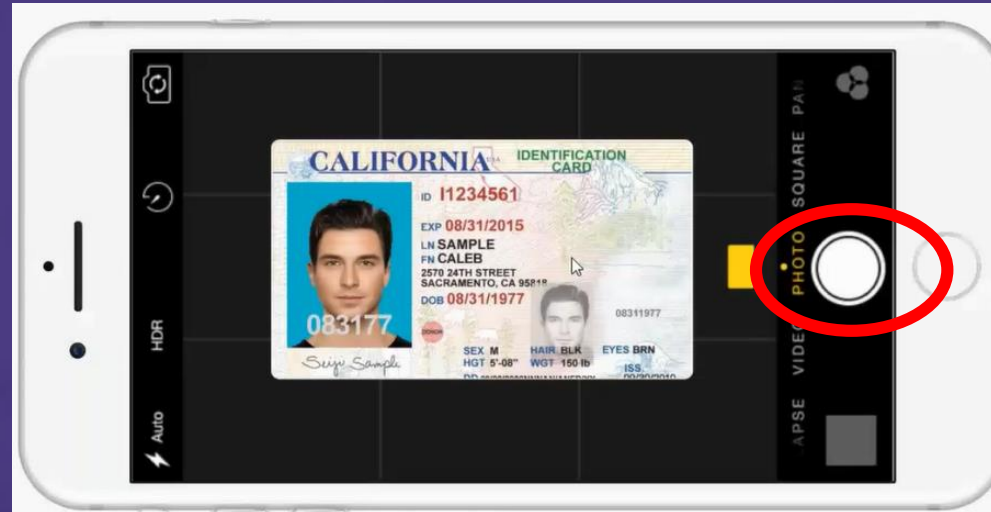**3** Select **Choose File** which will open your smartphone camera.
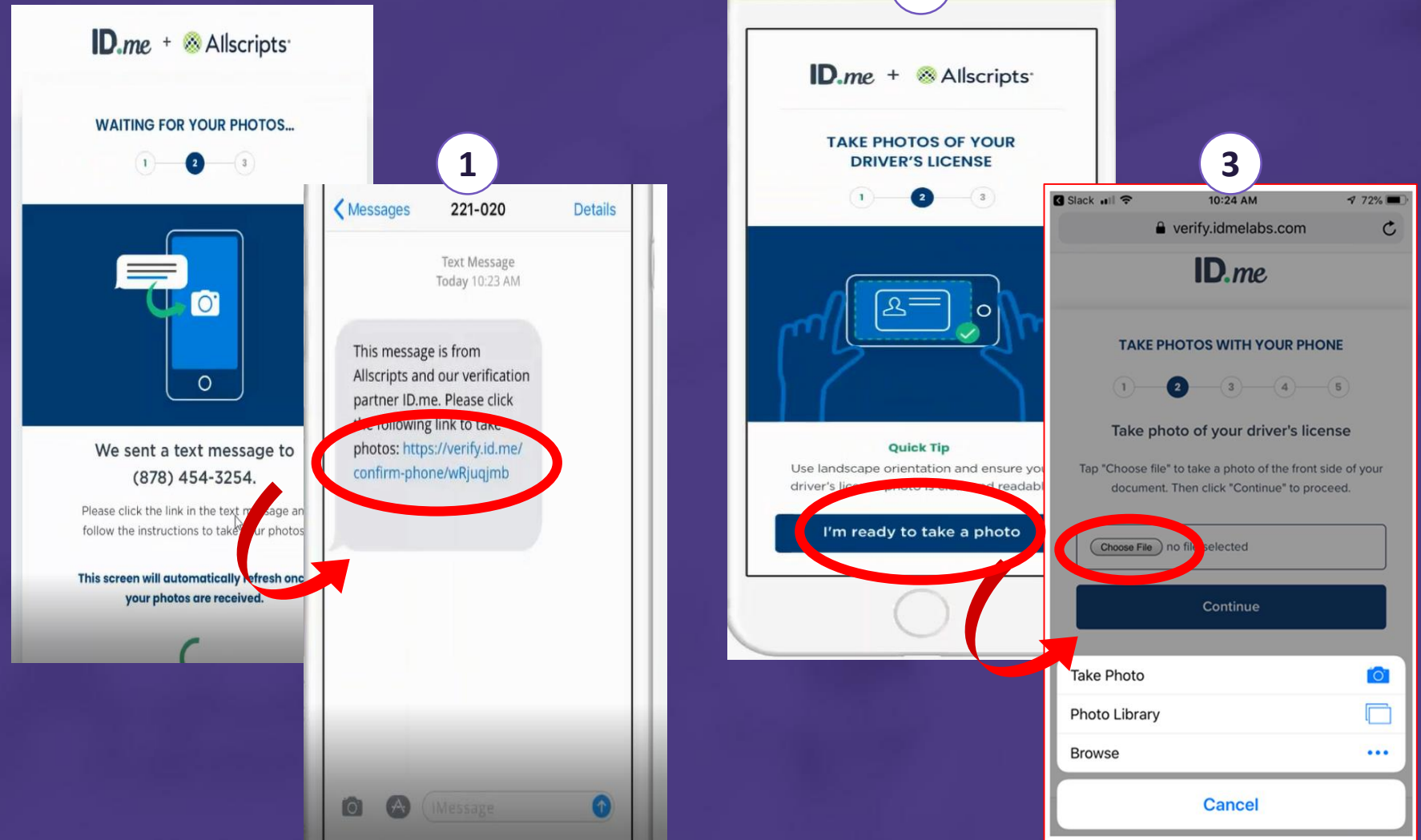
Taking a photo of your Driver's License
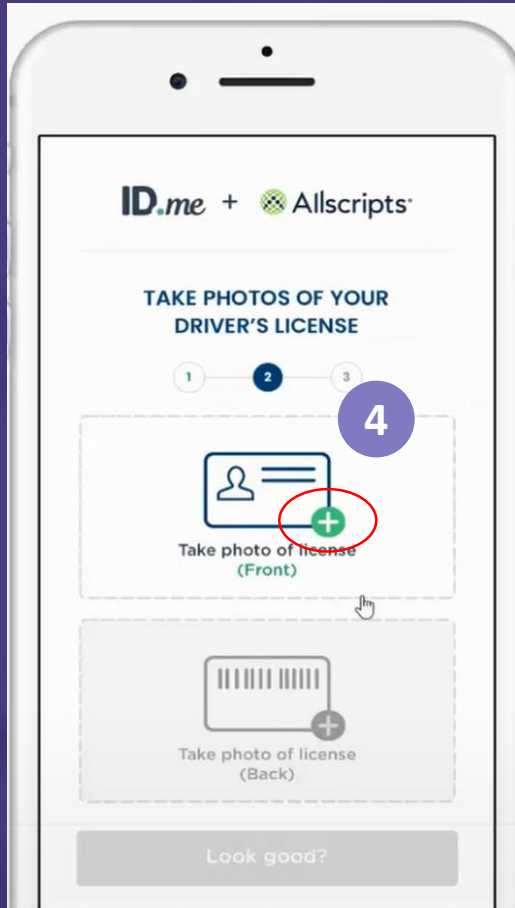
4 Click the "+" sign *Take photo of license (Front)*

- 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
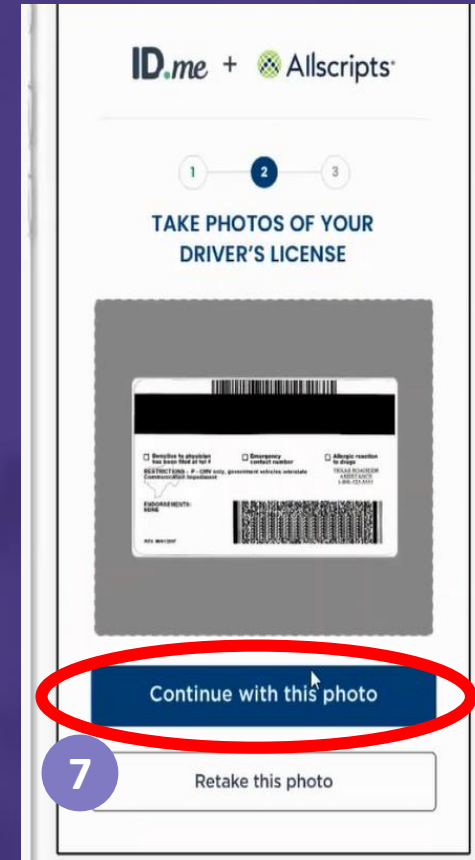
Verifying your Identity

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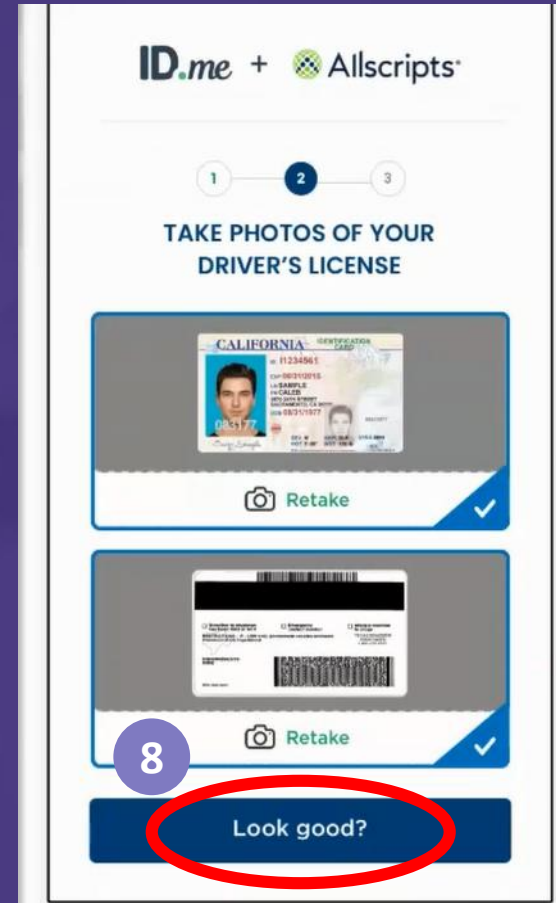
Enter Your SSN and Link ID.me account to Allscripts Security Account

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

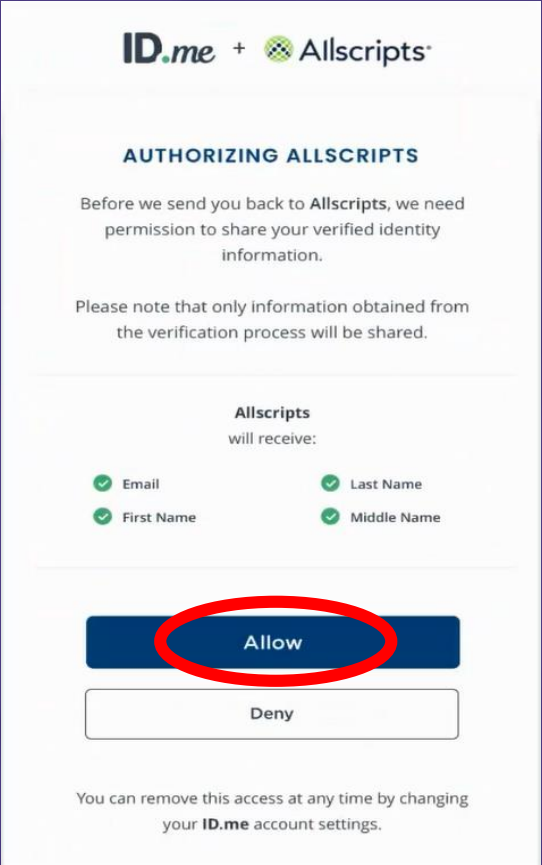**11** Select *Fair Credit Reporting Act (FCRA) check box*

12 Click *Continue*

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.
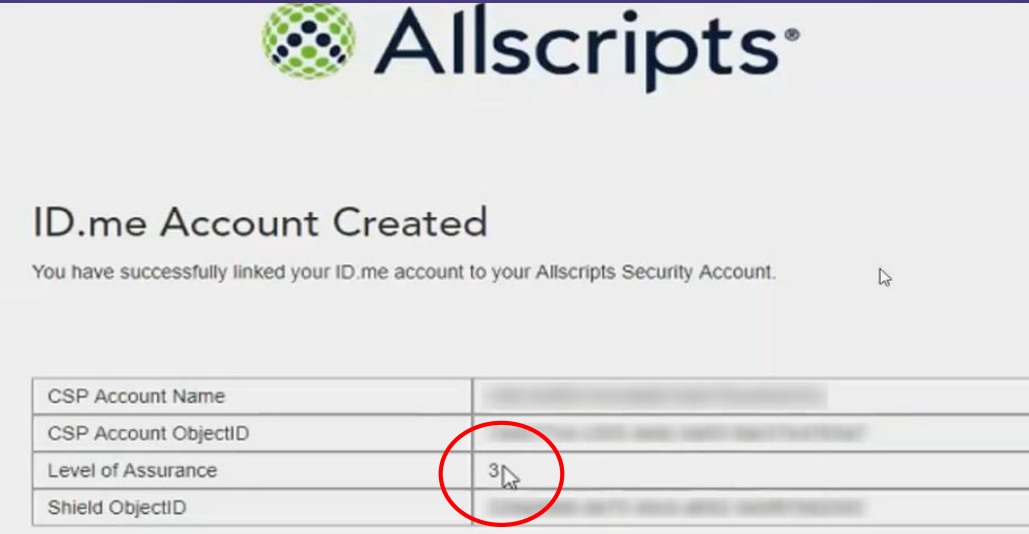
Step 3 - Granting EPCS Approver Status

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

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**

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

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	Int2sreecc2
* Password	●●●●●●●●●●●
Token Device	[_____▼] Request OTP
One Time Password(OTP)	●●●●●●

Accept Cancel

*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

Congratulations!

You have completed the EPCS Enrollment process