EPCS – Setup and Workflow

E-PRESCRIBING OF CONTROLLED SUBSTANCES
Assign permission to each staff member and provider who will be accessing the EPCS Module (either to create controlled medications within the note, or to send electronically).

This **can only be done** by a Prescribing provider.

**TO SETUP:**
1. Go to: Administration > Resource Management > Resource Setup
STEP 1: ASSIGN PERMISSIONS (Cont’d)

2. Select staff member or provider who will be accessing the EPCS Module

3. Per staff member > select **Permission** tab
STEP 1: ASSIGN PERMISSIONS (Cont’d)

4. Scroll down to EMR Permissions > EPCS Access > Check for Yes

<table>
<thead>
<tr>
<th>EMR</th>
<th>ALLOWED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note Access</td>
<td>Shared notes  ✔ Private notes ✔</td>
</tr>
<tr>
<td>Note Signing</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>Practice Note Deactivation</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>Self Note Deactivation</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>Note Privacy Setting</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>Uploaded Documents</td>
<td>Security is required for Encrypt, Decrypt and Hash options</td>
</tr>
<tr>
<td>Clinical Decision Support</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>Import External Clinical Data</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>ICD Management</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>CPT Management</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>EMR &amp; Medication Admin</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>Template Clone Tool</td>
<td>Check for Yes  ✔</td>
</tr>
<tr>
<td>EPCS Access</td>
<td>Check for Yes  ✔</td>
</tr>
</tbody>
</table>
**STEP 2: PROVIDER REGISTRATION AND ACTIVATION**

**PLEASE NOTE:**
This step will be repeated once for each prescribing provider. This must be done by at least one provider before any of the other steps can be completed.

Per provider (and individually) access registration process through
1. Go to: Administration > Resource Management > Resource Setup
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

2. Select Yourself

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test, Doc</td>
<td>dtest6292</td>
<td>Healthcare Provider -- Billing</td>
</tr>
<tr>
<td>Test, Jazmine</td>
<td>jtest5333</td>
<td>Non-Healthcare Provider</td>
</tr>
<tr>
<td>Test, Kylene</td>
<td>ktest4366</td>
<td>Non-Healthcare Provider</td>
</tr>
<tr>
<td>Test, NonProvider</td>
<td>Nonprovider</td>
<td>Non-Healthcare Provider</td>
</tr>
<tr>
<td>Test, Nora</td>
<td>nora</td>
<td>Non-Healthcare Provider</td>
</tr>
<tr>
<td>Test, Patti</td>
<td>ptest</td>
<td>Non-Healthcare Provider</td>
</tr>
<tr>
<td>Test, Provider</td>
<td>provider_test</td>
<td>Healthcare Provider -- Billing</td>
</tr>
</tbody>
</table>

3. Select Electronic Routing Tab

![Human Resource Management](image-url)

**Edit Resource Information**

- General
- Permission
- Resource Restrictions
- Schedule
- Universities
- Medical Schools
- Hospital Affiliates
- Academic Appointments
- Electronic Routing
- Provider Documents
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

4. The provider must already be registered with SureScripts for at least “New” Prescription permissions.
5. Select **Get Started** tab
6. Select **Type of Token** for EPCS Access. WRS suggest, and most provides will select the “SOFT” token for their smart phone. (The “HARDWARE” token is more expensive)
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

7. The provider will be taken through a series of “PAGES” that will be used to identity proof them through Experian. This is done entirely through the MD-Toolbox and WRS does not have any access to this information.
8. Once this ID proofing is completed, the provider will be prompted to download and install the mobile app (if that was the selected token choice) “VIP from SYMANTEC”

This email was auto generated from e-Prescribing EPCS Sign-up.

To complete your next step, please download and install the Software Token App (VIP from Symantec) on your smart phone.

On your smart phone go to your app store and search ‘VIP Access’ OR
Click the link below from your phone (or directly enter the link address into your phone browser).

http://m.vip.symantec.com

Follow the on screen instructions to download and install the App.

If you received this email in error and did not sign up for e-Prescribing please disregard and reply to this message to let us know.
9. Select Register My Token Tab

![Prescriber EPCS Signup - Doctor Test, M.D.]

Step 1 has been completed - your ID has been verified.

Step 2: Install the Mobile App.
An email has been sent to your email address with a link to install the App.
Follow the instructions to download and install the app on to your Smart Phone and click Register below after you have it installed.

I have it - Register My Token >>
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

10. The provider will now register their software token by creating a personal password and the token’s credential ID and security code (This code changes very frequently, so pay close attention to the code on your phone screen).

![Prescriber EPCS Signup - Doctor Test, M.D.]

- **Step 3. Register your Token**
  1. Please select a password: [ ] should be 6+ chars with nums or symbols
  2. Re-type your password: [ ]
  3. Credential Id: [ ] enter token assigned credential
  4. Security Code: [ ] enter code showing right now on token

Register >>
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

11. Once the token has been “SET UP”, the provider will be sent (either to the verified phone number, or the address indicated during set up) the final verification/activation code. This code can be entered through the EPCS signup module (preferred) which will complete the process, or it can be entered during the first instance of signing and esending a controlled medication.
12. Once you receive your activation code (sent either to your verified phone or via US mail) you can complete the finalization steps. Most verification will done via US mail, and you will receive the following letter.

Doctor Test
1313 Mockingbird Lane
Anytown, USA
Oct. 1, 2015
Subject: EPCS Activation Code

Dear Doctor Test:

Thank you for signing up for e-prescribing of controlled substances. After you have completed your token installation, please use the Activation Code below to activate your account. Mailing to your home address or calling your home phone number of record with this code is done for security purposes. We want to make sure that you and only you are able to use your e-prescribing account to write and electronically send medications.

If you did not sign up for e-prescribing, please contact us right away. If you did sign up, please use the code below to activate your account.

Activation Code: xxxxxxxxx

For support please call (866) 977-4367

Sincerely,

WRS Health
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

13. Return to the electronic routing page and complete the activation. Select the “ENTER 2-FACTOR ACTIVATION CODE” and enter the code sent to you in the box and activate.
STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont’d)

14. After successful activation, you will be alerted that your token is on file and you are signed up (enrolled) for EPCS, but may not enabled. You and a staff member with EPCS granted permissions must proceed to step 3 (EPCS access control and permissions)

PLEAS NOTE: If another provider has already completed the access control and permissions (this only needs to be done once practice wide), please log out and back in to enable EPCS.
STEP 3: ACCESS CONTROL AND PERMISSIONS

This process **requires 2 staff members** if any actions is ever done (addition, deletion, modification) as a dual sign off. One of those staff must be an EPCS enrolled provider.

1. Go to: Administration > Medication Setup > EPCS Access Control

**NOTE:** Only staff with permissions will have that access.
STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont’d)

2. Select the EPCS enrolled provider from the provider dropdown, and select the second user from the “2nd USER DROPDOWN”. That second user will be asked to enter their WRS login credentials.

![Electronic Prescription Controlled Substances - Logical Access Control Setup](image)

- Per the DEA rule for Controlled Substance Access Control, two users are required in order to save changes to this screen. You must get a second user that will authorize the changes below.
- One user must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials.
- The other user can be either a prescriber or staff admin (a user with admin permissions).

Select Prescriber who will Approve Changes/Sign off: [Doctor, Test M.D.]

You have selected Yourself as the First Signer. You must select a Second User who will also sign off on changes with you!

- Select 2nd User to Sign With You: [ ]

Ask the 2nd Signer to enter their login password here to signoff on the changes.

Instructions
- For EPCS Security Setup:
  1. Access Control Managers: Designate at least two users who will be in charge of managing access control (who can edit this screen) (at least one user must be a Prescriber who has signed up for EPCS).
  2. Authorization Verifier: Select which Access Control Manager(s) will be in charge of verifying DEA registration and State Authorization(s) as needed. This user must sign off that they have verified each Prescriber allowed to sign as having current good standing controlled substance registrations. This user is legally responsible for continually verifying that Prescribers are in good standing and will immediately revoke privileges if: a) The Prescriber’s token or password is lost, stolen or compromised. b) DEA registration expires. c) DEA registration is revoked, terminated or suspended d) no longer authorized e.g. leaves the practice.
  3. Ready to Sign: Select which Users are allowed to mark controlled substances “ready to sign”. Only users with Full RX permissions and prescribers are allowed to mark cs prescriptions.
  4. Sign+Send: Select which Prescribers are currently authorized send EPCS prescriptions (if they have signed up for EPCS Two Factor credentials using the Signup in the Setup menu).
3. The Access Control will list all staff with EPCS Permissions, both providers and any other staff. Permissions are indicated (by checkboxes) as follows; please check per staff member those permissions applicable:

A. **Has Validated Token:** This column is read-only and indicates which users have a registered EPCS token.

B. **Access Control Managers:** Designate at least two users who will be in charge of managing access control (who can edit this screen) (at least one user must be a Prescriber who has signed up for EPCS).
STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont’d)

C. Authorization Verifier: Select which Access Control Manager(s) will be in charge of verifying DEA registration and State Authorization(s) as needed. This user must sign off that they have verified each Prescriber allowed to sign as having current good standing controlled substance registrations. This user is legally responsible for continually verifying that Prescribers are in good standing and will immediately revoke privileges if:

i. The Prescriber’s token or password is lost, stolen or compromised
ii. DEA registration expires
iii. DEA registration is revoked, terminated or suspended
iv. No longer authorized e.g. leaves the practice
D. Allowed to mark Ready to Sign EPCS: Select which Users are allowed to mark controlled substances "ready to sign". Only users with Full RX permissions and prescribers are allowed to mark CS prescriptions.

E. Allowed to Sign and Send EPCS: Select which Prescribers are currently authorized send EPCS prescriptions (if they have signed up for EPCS Two Factor credentials using the Signup in the Setup menu).
4. Once all permissions have been granted, select the Save icon.

Per the DEA rule for Controlled Substance Access Control, two users are required in order to save changes to this screen. You must get a second user that will authorize the changes below.

- One user must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials.
- The other user can be either a prescriber or staff admin (a user with admin permissions).
5. This will trigger the prescriber to “SIGN AND AUTHORIZE”.
STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont’d)

6. Successful authorization of the Access Control settings will result in an alert indicating that changes have been saved. **Staff are advised to log out and back in to activate those changes.**
7. All steps checked, activated and enabled providers can e-send controlled medications.
STEP 4: SENDING A CONTROLLED MEDICATION

For those providers successfully registered and enabled with EPCS permissions:

- From the medication page, create all controlled medications for that patient and add as current note prescriptions. When selecting the pharmacy for all controlled medications, please ensure that pharmacy is indicated as EPCS enabled.

- There will be two “SEND” buttons for esending medications. One for non-controlled and one for controlled (non registered providers will not have the “CONTROLLED” button).

- This allows the provider to bulk send those specific types of medications and address together.

- Properly created non controlled medications will be sent with no change to workflow.
STEP 4: SENDING A CONTROLLED MEDICATION (Cont’d)

When selecting to electronically send the controlled medications (from the SEND button), all those controlled medications will be identified as “controlled prescriptions that will be sent together (OK, or CANCEL buttons)
STEP 4: SENDING A CONTROLLED MEDICATION (Cont’d)

- Once indicated as “COMPLETE”, the popup window will address the pharmacy (taken from the primary pharmacy listed) which can be updated, the patient name and required demographics and the complete prescription(s)

- Select “E-SEND” to send electronically
STEP 4: SENDING A CONTROLLED MEDICATION (Cont’d)

- The prescribing provider will now be prompted to enter their password (set up during registration) and the VIP security code.
- Use your token to obtain this code (remembering it changes frequently) and add in that code text box.
- Then select “Sign + Send” button which will add your electronic signature and electronically send to the pharmacy.
STEP 4: SENDING A CONTROLLED MEDICATION (Cont’d)

- And the popup prescribing window will show a “Complete” status.
- As well as the send time stamp.
CONGRATULATIONS
YOU HAVE SUCCESSFULLY SENT
CONTROLLED MEDICATIONS!!!