

# **EPCS – Setup and Workflow**

E-PRESCRIBING OF CONTROLLED SUBSTANCES

## STEP 1: ASSIGN PERMISSIONS

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

EMR

Billing

Order Tracking

Documents

Messaging

Administration

Test, NonProvider	Nonprovider
Test, Nora	nora
Test, Patti	ptest
Test, Provider	provider_test

3. Per staff member > select **Permission** tab



## STEP 1: ASSIGN PERMISSIONS (Cont'd)

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

EMR	ALLOWED
Note Access ?	Shared notes <input checked="" type="checkbox"/> Private notes <input checked="" type="checkbox"/>
Note Signing ?	Check for Yes <input checked="" type="checkbox"/>
Practice Note Deactivation ?	Check for Yes <input checked="" type="checkbox"/>
Self Note Deactivation ?	Check for Yes <input checked="" type="checkbox"/>
Note Privacy Setting ?	Check for Yes <input checked="" type="checkbox"/>
Uploaded Documents ? Security is required for Encrypt, Decrypt and Hash options	View <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Security <input checked="" type="checkbox"/>
Clinical Decision Support ?	Check for Yes <input checked="" type="checkbox"/>
Import External Clinical Data ?	Check for Yes <input checked="" type="checkbox"/>
ICD Management ?	Check for Yes <input checked="" type="checkbox"/>
CPT Management ?	Check for Yes <input checked="" type="checkbox"/>
EMR & Medication Admin ?	Check for Yes <input checked="" type="checkbox"/>
Template Clone Tool ?	Check for Yes <input checked="" type="checkbox"/>
EPCS Access ?	Check for Yes <input checked="" type="checkbox"/>

## 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



Test, Doc	dtest6292	Healthcare Provider -- Billing
Test, Jazmine	jtest5333	Non-Healthcare Provider
Test, Kylene	ktest4366	Non-Healthcare Provider
Test, NonProvider	Nonprovider	Non-Healthcare Provider
Test, Nora	nora	Non-Healthcare Provider
Test, Patti	ptest	Non-Healthcare Provider
Test, Provider	provider_test	Healthcare Provider -- Billing

### 3. Select Electronic Routing Tab

**Human Resource Management**  
**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)

- The provider must already be registered with SureScripts for at least **“New” Prescription** permissions.

Electronic Routing

Provider Documents

Electronic Routing Setup

Company	New Prescription	Refills	EPCS Enabled	Action
SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>Save</div>

Prescriber EPCS Signup - Doctor Test M.D.

EPCS Signup Form - New Signup

This screen allows Prescribers to sign up for Electronic Prescribing of Controlled Substances (EPCS). This sign-up can only be done by the Prescriber themselves.

Per the DEA Ruling, EPCS requires two factor authentication signoff each time you electronically send a controlled substance prescription. Two factor sign off must include something you have (e.g. Token) and something you know (e.g. Password).

This sign up screen will allow you to attain a two factor credential to be used each time you e-Send controlled drugs.

Steps

Get Started

Ready to Start Sending Controlled Substances? Here are the steps to get setup:

☐ Get Started: Select Token Type & Complete ID Proofing

ID Proofing is completed to make sure you are who you say you are - always completed prior to 2-Factor Setup

☐ Setup 2-Factor Credentials

You will select a secret signing password and setup your token for first use

☐ Enter 2-Factor Activation Code

Experian activation code-this code will be sent to your verified phone or address: Enter this code on your first e-Send or come back to this screen to enter it.

## STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont'd)

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)

### Electronic Routing Setup

Company	New Prescription	Refills	EPCS Enabled	Action
Sure Scripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Save"/>

This sign up screen will allow you to attain a two factor credential to be used each time you e-Send controlled drugs.

Obtain 2 Factor Credentials:

- ☒ **Software Token:** Sign-up for a Software Token that I will download to my smart phone\*
- ☐ **Hardware Token:** Sign-up for a Key Fob hardware token that will be mailed to me\*\*

*\*The Software Token requires you to download and install a Smart Phone App from a third party company. The App download is free but additional fees may apply on your e-Prescribing bill for the software token. Please contact your sales rep. for more information. You must have a Smart Phone that is compatible with the software (iPhone, Android, Blackberry, Windows Mobile). All cell phone charges (including data usage) will be your responsibility.*

*\*\*The Hardware Token is a small Key Fob token you carry with you that has the 2 Factor signing app on it. The token can only be mailed to your verified home address and can take up to 5-7 business days to arrive. After you receive your token in the mail you will come back to this screen to set it up. Additional charges may apply for the hardware token (contact your sales rep for more info).*

Press Next to Begin the Sign up process

## 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.

Electronic Routing

Provider Documents

Electronic Routing Setup

Company	New Prescription	Refills	EPCS Enabled	Action
SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>Save</div>

**Prescriber EPCS Signup - Doctor Test M.D.**

2-Factor Token

Setup Steps:  
1. ID Proofing  
2. Install the Smart Phone App  
3. Register/Setup your App for use for signing

Step 1: ID PROOF

In order to setup and register for a token, you must do ID Proofing.

Next

## STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont'd)

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 SYMANTIC"

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.

## STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont'd)

### 9. Select Register My Token Tab

Company	New Prescription	Refills	EPCS Enabled	Action
SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Save</a>

#### 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**)

SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Save
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### Prescriber EPCS Signup - Doctor Test, M.D.

#### Step 3. Register your Token

1. Please select a password:	<input type="text"/>	<i>should be 6+ chars with nums or symbols</i>
2. Re-type your password:	<input type="text"/>	
3. Credential Id:	<input type="text"/>	<i>enter token assigned credential</i>
4. Security Code:	<input type="text"/>	<i>enter code showing right now on token</i>

Register >>

## STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont'd)

11. Once the token has been “SET UP”, the provide 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

SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Save
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### Prescriber EPCS Signup - Doctor Test, M.D.

Congratulations! Your token has been setup!

EPCS signup has been successfully completed and your account has been activated.

Before you can start electronically sending controlled substances you will need to:

- 1) Ask the Admin/Access Control Manager at your site to turn permissions on for you to be able to sign & send CS Drugs.
- 2) You will receive a Final Verification/Activation Code to your VERIFIED Phone or Address. Enter this code the first time you sign and send a controlled substance or come back to this sign up screen to enter it on the main page.

Click Finish to go back to the EPCS Check Off List. [Finish/Close](#)

## STEP 2: PROVIDER REGISTRATION AND ACTIVATION (Cont'd)

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 be 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

The screenshot shows the 'SureScripts' web interface for provider registration. At the top, there are four checkboxes for different setup steps: 'Get Started' (checked), 'Setup 2-Factor Credentials' (checked), 'Enter 2-Factor Activation Code' (unchecked), and 'Access Control-Set Permissions' (unchecked). A 'Save' button is located to the right of these checkboxes. Below the checkboxes, the 'Get Started' step is selected, and the page displays instructions for starting the setup. The instructions include a list of steps: 'Get Started: Select Token Type & Complete ID Proofing', 'Setup 2-Factor Credentials', and 'Enter 2-Factor Activation Code'. The 'Enter 2-Factor Activation Code' step is highlighted in yellow. Below this, there is a text input field for the activation code, which is also highlighted in yellow, and an 'Activate' button. The page also provides information about how the activation code will be sent (via phone or mail) and where to find support if needed.

SureScripts

Steps Get Started

Ready to Start Sending Controlled Substances? Here are the steps to get setup:

- ☒ Get Started: Select Token Type & Complete ID Proofing  
*ID Proofing is completed to make sure you are who you say you are - always completed prior to 2-Factor Setup*
- ☒ Setup 2-Factor Credentials  
*You will select a secret signing password and setup your token for first use*  
Reset Signing Password  
Token Maintenance: Click here to Deactivate Token or Get/Set up a New Token
- ☐ Enter 2-Factor Activation Code  
*Experian activation code-this code will be sent to your verified phone or address: Enter this code on your first e-Send or come back to this screen to enter it.*
- ☐ Access Control-Set Permissions  
*After your token is setup, permissions must be setup by the access control managers at your site*

Did you receive your code? Enter it here to activate:

Havent received your code yet?

Your activation code will be sent via phone or mail to your verified phone number or address.  
Phone: A message will be left that says "Thank you for signing up for EPCS, your code is...."  
Address: A welcome letter will arrive in 2-5 business days that includes your code.  
Questions? Contact support to find out when your code was sent or request that the code be re-sent.

## 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 be enabled. You and a staff member with EPCS granted permissions must proceed to step 3 (EPCS access control and permissions)

**TOKEN ON-FILE:** You are currently signed up for EPCS - Use this screen to obtain a new token or re-validate your token or re-set password.

This screen allows Prescribers to sign up for Electronic Prescribing of Controlled Substances (EPCS). This sign-up can only be done by the Prescriber themselves.

Per the DEA Ruling, EPCS requires two factor authentication signoff each time you electronically send a controlled substance prescription. Two factor sign off must include something you have (e.g. Token) and something you know (e.g. Password).

This sign up screen will allow you to attain a two factor credential to be used each time you e-Send controlled drugs.

**Steps** **Get Started**

Ready to Start Sending Controlled Substances? Here are the steps to get setup:

- ☒ **Get Started: Select Token Type & Complete ID Proofing**  
*ID Proofing is completed to make sure you are who you say you are - always completed prior to 2-Factor Setup*
- ☒ **Setup 2-Factor Credentials**  
*You will select a secret signing password and setup your token for first use*  
Reset Signing Password  
Token Maintenance: Click here to Deactivate Token or Get/Setup a New Token
- ☒ **Enter 2-Factor Activation Code**  
*Experian activation code-this code will be sent to your verified phone or address: Enter this code on your first e-Send or come back to this screen to enter it.*
- ☐ **Access Control-Set Permissions**  
*After your token is setup, permissions must be setup by the access control managers at your site*

**PLEASE 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 "2<sup>nd</sup> USER DROPDOWN". That second user will be asked to enter their WRS login credentials.

SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Save
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**Electronic Prescription Controlled Substances - Logical Access Control Setup**

**Save**

*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:  ▼

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).

## STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont'd)

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

### STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont'd)

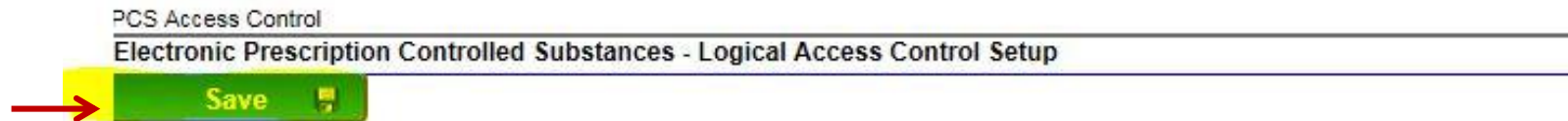
**D. Allowed to mark Ready to Sign EPCS:** Select which Users are allowed to mark controlled substances "ready to sign". Only users with Full RX permissions and prescribers are allowed to mark CS prescriptions.

**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).

Permissions					
	Has Validated Token	Access Control Manager	Authorization Verifier	Allowed to mark Ready to Sign EPCS	Allowed to Sign and Send EPCS
Doctor Test M.D.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doctor Tester M.D.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont'd)

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).*

## STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont'd)

5. This will trigger the prescriber to “SIGN AND AUTHORIZE”.

Save

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.

-One user must be a Prescriber who has signed up for EPCS.  
-The other user can be either a prescriber or a pharmacist.

Select Prescriber who will Approve Changes:

**Instructions**

For EPCS Security Setup:

1. Access Control Managers: Designate at least one user to manage access control.
2. Authorization Verifier: Select which Access Control Managers are allowed to sign as having current good standing. (If a) The Prescriber's token or password is lost, b) The Prescriber is on vacation, or c) The Prescriber is no longer authorized to prescribe.
3. Ready to Sign: Select which Users are allowed to sign off on changes to Access Control.
4. Sign+Send: Select which Prescribers are allowed to sign off on changes to Access Control.

**Permissions**

	Has V
Doctor Test M.D.	
Doctor Tester M.D.	


**Controlled Substance Signoff Required**

Prescriber: Doctor Test M.D. DEA#123456 123 Smith Street Town, NY 12345

By completing the two-factor authentication protocol at this time, you are legally signing off on changes to EPCS access control. You agree that you have reviewed the changes made to Access Control and you give your authorization.

Sign Password:

VIP Security Code:

Enabled by: 

**Sign+Authorize** **Cancel**

close X

who has signed up for EPCS).

that they have verified each Prescriber g and will immediately revoke privileges orized e.g. leaves the practice

rescriptions.

up menu).

**Allowed to Sign and Send EPCS**

<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>

## 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.**

EPCS Access Control

Electronic Prescription Controlled Substances - Logical Access Control Setup

**Save**

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:


**Record Saved. Settings take effect on next login**

**Instructions**

For EPCS Security Setup:

1. Access Control Managers: Designate at least two users who will be responsible for managing access control.
2. Authorization Verifier: Select which Access Control Manager is allowed to sign as having current good standing controlled substances. If: a) The Prescriber's token or password is lost, stolen or compromised, the Prescriber must sign off that they have verified each Prescriber's good standing and will immediately revoke privileges if 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).

**Message from webpage**

 Access control changes have been saved. Please logout and re-login for changes to take effect!

**OK**

## STEP 3: ACCESS CONTROL AND PERMISSIONS (Cont'd)

7. All steps checked, activated and enabled providers can e-send controlled medications.

Company	New Prescription	Refills	EPCS Enabled	Action
SureScripts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Save</a>

### Prescriber EPCS Signup - Doctor Test, M.D.

**TOKEN ON-FILE:** You are currently signed up for EPCS - Use this screen to obtain a new token or re-validate your token or re-set password.

This screen allows Prescribers to sign up for Electronic Prescribing of Controlled Substances (EPCS). This sign-up can only be done by the Prescriber themselves.

Per the DEA Ruling, EPCS requires two factor authentication signoff each time you electronically send a controlled substance prescription. Two factor sign off must include something you have (e.g. Token) and something you know (e.g. Password).

This sign up screen will allow you to attain a two factor credential to be used each time you e-Send controlled drugs.

Steps [Get Started](#)

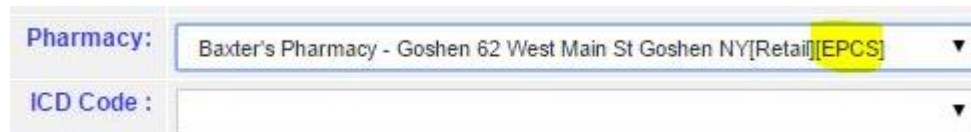
Ready to Start Sending Controlled Substances? Here are the steps to get setup:

- ☒ **Get Started: Select Token Type & Complete ID Proofing**  
*ID Proofing is completed to make sure you are who you say you are - always completed prior to 2-Factor Setup*
- ☒ **Setup 2-Factor Credentials**  
*You will select a secret signing password and setup your token for first use*  
Reset Signing Password  
Token Maintenance: [Click here to Deactivate Token or Get/Setup a New Token](#)
- ☒ **Enter 2-Factor Activation Code**  
*Experian activation code-this code will be sent to your verified phone or address: Enter this code on your first e-Send or come back to this screen to enter it.*

## 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.



The screenshot shows a web form with two fields. The first field is labeled 'Pharmacy:' and contains a dropdown menu. The selected option is 'Baxter's Pharmacy - Goshen 62 West Main St Goshen NY[Retail][EPCS]', with the '[EPCS]' part highlighted in yellow. The second field is labeled 'ICD Code :' and is currently empty.

- There will be two “SEND” buttons for sending 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)

CURRENT NOTE PRESCRIPTIONS				
<input type="checkbox"/>	Prescription	Administration Date	Print	Delete
<input type="checkbox"/>	Lortab 5 mg-325 mg tablet Take 1 tablet(s) by oral route , every 6 hours , for 8 days , 30 Tablet & no refills			

PREVIOUS PRESCRIPTIONS/ CURRENT MEDICATIONS	
<input type="checkbox"/>	Previously Prescribed Medications
<input type="checkbox"/>	Flonase 50 mcg/actuation nasal spray,suspension Inhale 1 spray(s) by Intranasal route , 1 time per day , for 30 days , 2 inhaler &refills: 1
<input type="checkbox"/>	Avalide 150 mg-12.5 mg tablet Take 1 tablet(s) by ORAL route , per day , for 90 days , 90 tablet(s) &refills: 3 Comments: spoke w/Dr. G and ok'd
<input type="checkbox"/>	Toprol XL 100 mg tablet,extended release Take 1 tablet(s) by ORAL route , per day , & no refills

CURRENT NOTE PRESCRIPTIONS	
<input type="checkbox"/>	Prescription
<input type="checkbox"/>	Lortab 5 mg-325 mg tablet Take 1 tablet(s) by oral route

PREVIOUS PRESCRIPTIONS/ CURRENT MEDICATIONS	
<input type="checkbox"/>	Previously Prescribed Medications
<input type="checkbox"/>	Flonase 50 mcg/actuation nasal spray,suspension Inhale 1 spray(s) by Intranasal route , 1 time per day , for 30 days , 2 inhaler &refills: 1
<input type="checkbox"/>	Avalide 150 mg-12.5 mg tablet Take 1 tablet(s) by ORAL route , per day , for 90 days , 90 tablet(s) &refills: 3 Comments: spoke w/Dr. G and ok'd
<input type="checkbox"/>	Toprol XL 100 mg tablet,extended release Take 1 tablet(s) by ORAL route , per day , & no refills

Prescription Details

Controlled prescriptions that will be routed :

Lortab 5 mg-325 mg tablet

## 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

Patient Medication

--Prescription Preview-- close X

Please review for accuracy and then press e-Send/Print to mark the rx complete and route:

**e-Send**

e-Send Preview (1)


Send to Pharmacy: CVS/pharmacy #5059

Addr: 98 CLOWES AVE. GOSHEN, NY 10924

Ph/Fx: 8452948700 8456151257

For Patient: Resa Test (Female Birthdate: 5/11/1956)  
112 Area Look  
West Nyack, NY 10994  
H)5555555555

Prescriptions to e-Send:

 Lortab 5 mg-325 mg tablet

Directions: Take 1 tablet(s) by oral route , every 6 hours , for 8 days  
Dispense#: 30 (Tablet) Days:8 Refills:0 R -Substitution Allowed-  
Note:  
Schedule: 2 PrimaryDiaq/ICD: WrittenDate:10/1/2015  
Prescribed Doctor Test M.D. 123 Smith Street Town, NY 12345  
By: Doctor Tester M.D. Supervisor  
Cov/Ins: Unknown Coverage-

## 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

Doctor Test M.D.

Patient M...

Lortab 5  
Take 1 t  
Prescrib

--Sign-- close X


**Controlled Substance Signoff Required**

Prescriber:	Doctor Test M.D. 123 Smith Street Town NY 12345
Patient:	Resa Test 112 Area Look West Nyack NY 10994
Prescription:	Lortab 5 mg-325 mg tablet Sig:Take 1 tablet(s) by oral route , every 6 hours , for 8 days , Dispense:30 Tablet, Refills:0 Written Date: 10/1/2015

By completing the two-factor authentication protocol at this time, you are legally signing the prescription(s) and authorizing the transmission of the above information to the pharmacy for dispensing. The two-factor authentication protocol may only be completed by the practitioner whose name and DEA registration number appear above.

Sign Password:

VIP Security Code:

Enabled by:  Symantec Validation & ID Protection

**Sign+Send** **Cancel**

## STEP 4: SENDING A CONTROLLED MEDICATION (Cont'd)

- And the popup prescribing window will show a **“Complete”** status

The screenshot shows a 'Prescription Details' window. At the top, it lists 'Prescription' details for 'Lortab 5 mg-325 mg tablet' with instructions 'Take 1 tablet(s) by oral route'. Below this are buttons for 'Repeat/Refill' and 'Move To...'. Further down are 'Send Counsel' and 'Print' buttons. The 'PREVIOUS PRESCRIPTIONS/ CURRENT' section shows 'Previously Prescribed' medications. The 'Patient Medications' section displays the medication name, instructions, and a status of 'Complete' (highlighted in green). A yellow box highlights the send time stamp: 'e-Sent: Oct 1 2015 12:57PM CVS/pharmacy #5059 Sent/Verified'. A red arrow points from the 'Complete' status to the text 'And the popup prescribing window will show a “Complete” status' in the list above. Another red arrow points from the send time stamp to the text 'As well as the send time stamp' in the list below.

Prescription Details

Prescriber: Doctor Tester M.D.  
Doctor Test M.D.

Location: Medical Office

Patient Medications:

Lortab 5 mg-325 mg tablet  
Take 1 tablet(s) by oral route , every 6 hours , for 8 days for 8 days (0 refills) Current 10/1/2015  
Prescriber: Kaitlyn Barbalich

Complete

e-Sent: Oct 1 2015 12:57PM CVS/pharmacy #5059  
Sent/Verified

- As well as the send time stamp

CONGRATULATIONS  
YOU HAVE SUCCESSFULLY SENT  
CONTROLLED MEDICATIONS!!!