EPCS ID.me Enrollment

- ID.me Integration
- OTP enrollment
- Identification Proofing

See Client Connect -EPCS Central- for helpful tools!
https://clientconnect.allscripts.com/groups/epcs-central/overview
Pre-Requisites:

- Allscripts Security Account created and credentials known
- Email access (no group emails)
- Smart Phone with Camera, Browser, and Text Messaging access
  - iOS 10.3 or higher
  - Android 6 or higher
- ID.me Authenticator App installed on Smart Phone
  - On smart phone that will be used for daily EPCS submissions
- Drivers License, Passport, or Passport Card
  - This can be physically with prescriber at time of enrollment to get photo of
  - or saved to a document that can be accessed from the device they will use
during enrollment
- SSN
Summary of ID.me Process:

1. Sign up for ID.me account & confirm email
2. Secure account & confirm device
3. Generate and obtain a recovery code
4. Choose ID verification method & provide documents
   (Drivers License, Passport, Passport card, or answer questions about credit history)
5. Enter SSN & Confirm information is correct
6. Allow & continue to link ID.me account to your Allscripts Security Account

Provider is ready for EPCS approval!
Step 1: Signup ID.me Account & Confirm Email

Create ID.me account using email
Confirm email from Inbox
ID.me Authenticator Application and Code Generator

Before you begin the ID.me enrollment process:

- You must have a smart phone or tablet with a functioning camera and browser. You must download the ID.me Authenticator application from the application store on your smart device.
- This will be the 2 Factor Authentication (2FA) device used to generate the OTP (One Time Passcode) for signing electronic Controlled Substance prescriptions.
- From TWEHR Tasking, access & Go To EPCS Enrollment task
Create ID.me Account

From TWEHR Tasking, access & **Go To EPCS Enrollment** task:

- **✓** Click “Sign Up for an account” to create your ID.me Account

Or

- **✓** Login to your existing ID.me account if you have previously created one
Create ID.me Account

Enter your individual email address and create a password to sign up for an ID.me account:

- Group or shared emails are not allowed
- Your email address will be your username to log into ID.me
- If using a corporate provided email, IT team will need to check/update email settings to allow all emails from @id.me
Confirm Email for ID.me Account

- Open your email Inbox
- Find email from hello@id.me
- Click “Confirm your email”
- Return to ID.me browser setup page
Step 2: Secure ID.me Account & Confirm OTP Device

Generate QR Code from PC
Take photo of QR Code from ID.me App
Enter 6-digit code from ID.me App into PC
Secure ID.me Account: Generate QR Code

- After confirming your email, return to the ID.me setup workflow on your browser to continue with Allscripts.

- Click **Select** to complete multi-factor authentication with the code generator.
Secure ID.me Account: Allow ID.me Camera Access

✓ Access the ID.me app on your smart device

✓ Click the + sign in the upper right of app to scan the QR code

✓ Click OK to allow ID.me to access the device’s camera
Secure ID.me Account: Scan QR Code

- Position the square box on phone to cover the QR code on enrollment PC screen. Phone will automatically recognize & capture code.

- Enter the 6 digit code from phone into field on browser to confirm your device.

**NOTE**: The one time password refreshes every 30 seconds.

- Click **Continue**
Secure ID.me Account: 2FA Device Enrolled

- Your 2nd Factor Authentication (2FA) device is now setup & secure!

- Click Continue to generate a recovery code
Step 3: Generate & Obtain Recovery Code

Recovery Code - 1 time code used if 2FA device is lost or replaced
Secure ID.me Account: 2FA Device Enrolled

Save Recovery Code displays

☑️ Download and/or save the recovery code in a “safe place”.
  ➢ This **1-time code** will be used in the event the device is lost or provider replaces the 2FA device they which to install the ID.me app for EPCS submissions
  ➢ Provider has the option to download a copy of this code
  ➢ **DO NOT** recommend provider choose option to remind them later

☑️ Click **I have copied the recovery code**
Step 4: Choose ID Verification Method & Provide Documents

Choose to provide: Drivers License, Passport, or Passport Card
Alternatively can choose to answer questions about credit history
Identity Proofing Process

- From your browser, click **Continue**

Select one of these methods for verifying your identity
- Upload photos of your license or state ID
- Upload a photo of your passport
- Upload photos of your passport Card
- Answer questions about your credit history

- Click **Start Now** for the desired verification method
Identity Proofing Process: Submit Photos

If using driver’s license:
✓ Click **Take photo with your phone**
  ➢ You will need a mobile device that can receive text messages and can be used to upload your photo
  ➢ For identity proofing purposes, the device should be registered in your name

• Enter your mobile phone number and click **Continue**
  ➢ If typing # does not work, workaround is to type # in WordPad (or the like), then copy/paste into the ID.me field.
Identity Proofing Process: Submit Photos

You will receive a text message with a link that will allow you to take photos. Your PC browser window will wait for this process to be completed, refreshing automatically when done.

✓ Open Text Message and click to open the link on your smart device
Identity Proofing Process: Submit Photos

- Click *I'm ready to take a photo*
  - Be sure to be in a well lit area with a smooth flat surface to place license on
- Touch icon to *Take photo of license (Front)*
- Click *Continue with this photo* (or retake if needed)
Identity Proofing Process: Submit Photos

- Touch Icon to Take photo of license (Back)
- Click Continue with this photo (or retake if needed)
Identity Proofing Process: Submit Photos

✓ Verify that your photos are clearly displayed on your smart device, and then click **Look good?**

✓ Your license or state ID is uploaded

✓ Return to your browser
Step 5: Enter SSN & Confirm Information is correct
Enter SSN & Confirm Info

- On your browser, enter your social security number, and then click Continue.

- Confirm your information on the next screen
  - Some (not all) sections will have EDIT button that can be utilized if necessary

- Select Fair Credit Reporting Act (FCRA) check box

- Click Continue
Step 6: Allow & Continue

To link ID.me account to your Allscripts Security Account and TWEHR Instance
Allow & Continue

After you follow the authentication steps, you must 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 (LOA-3) and has successfully linked to your Allscripts account.

✓ Navigate back to Allscripts EHR, and complete a fresh login.

Designated EPCS Approver to complete EPCS approval process
ID Verification Not Established

In the event that your identity cannot be verified with ID.me online, you will receive a message similar to this one.

Refer to the Online Proofing Exceptions instructions in next slides as needed.
Online Proofing Exceptions

https://www.id.me/business/virtual-in-person-identity
Online Proofing Exceptions

If your individual identity cannot be verified online:
✓ Click Retry
✓ Complete the identity proofing steps again as instructed on the app

If you receive the message “We’re unable to verify your identity” again, you are then required to complete a video conference with an ID.me representative (Trusted Referee) to confirm your identity and complete the enrollment process.

Note: These steps are only for users that fail to complete the online identity proofing workflow. You will only be prompted to complete these steps if necessary.

✓ From your browser, click Schedule Now
Online Proofing Exceptions

✓ Click **Get Started**

✓ Select a preferred date and time, and then click **Continue**

✓ Confirm your personal information, and then click **Continue**
Online Proofing Exceptions

- Select a primary and secondary identification document
  This link may be helpful: https://help.id.me/hc/en-us/articles/360012933634-What-is-a-Primary-or-Secondary-Identification-Document

- Click Continue

- From your smart device, take and upload photos of your identification documents, and then click Continue

- Enter your mobile phone number, and then click Continue. This screen automatically refreshes when your photos are received
Online Proofing Exceptions

✔ From your smart device, click the link in the text message from ID.me, and then take a photo of yourself using your smart device camera.

✔ Under Selfie, click Choose.

✔ Click Choose file, and then select the photo you took of yourself.

✔ Click Submit Selfie.

✔ Return to your browser to view your appointment confirmation. Your video call appointment with an ID.me referee is scheduled and confirmed. An email with link to follow the day of the appointment will also be sent.
Submitting an Electronic Prescribed Controlled Substance

Confirm Rx information & Sign
Using ID.me 2FA Device to Authentication
Submitting EPCS: Confirm Information

Following Commit action in TWEHR, the following will display:
✓ Confirm Info: correct patient, pharmacy, prescriber, and controlled medication details
✓ Click the checkmark(s) to confirm the prescription(s)
✓ Click Sign Now.

Electronic Prescribing of Controlled Substances Confirmation

Allscripts, Brad  |  09 Mar 1954  |  Male  |  1895 Shelburne Rd. Apartment 4, 2nd Main, Donmlur Tinley Park, IL 60654 USA

DEA NUMBER
GR241678

PROVIDER
Russell, Roger
3153 N 12th Street
Grand Junction, OH 80654

SUPERVISOR

PHARMACY
100076 PHARMACY STOREL MU LONG NAME
56789 LONG PHARMACY NAME FOR 10.6MU
1234 LONG ADDRESS LINE 2 FOR 10.6MU
REALLYLONGCITYNAMEFO, CA 9000998888

CONTROLLED SUBSTANCES

Nuvigil 150 MG Oral Tablet  |  12 Tablets: TAKE 12 TABLET 1 time per day

QUANTITY  |  REFILLS  |  ISSUE DATE  |  START DATE
12  |  9  |  10-Jan-2019

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 practitioners whose name and DEA registration number appear above.

Sign Now
Using ID.me as a Multi-Factor Authenticator

- Enter your TouchWorks EHR Password
  *This is the 1st authentication factor—“something you know”*

- Using ID.me app, obtain the active 6-digit code

- Enter 6-digit code into the OTP field
  *This is the 2nd authentication factor—“something you have”*

- Click Authenticate.
EPCS Provider Reports

Accessing Reports: Adhoc & Monthly Reports

For full details, see the Electronic Prescriptions for Controlled Substances (EPCS) Implementation Guide available in the Allscripts Central Product Documentation
EPCS Reports

EPCS Reports are available for EPCS Signing Approved prescribers only, as way to review EPCS activity.

From VTB, choose EPCS and select EPCS Reports tab which will launch the EPCS Report Launcher.
EPCS Reports: Reports Launcher

Once the Report Launcher is open:

✓ Click on the Report Option tab to generate either an Ad Hoc Report or Monthly Report.

✓ In the Adhoc Report section, select the date ranges you wish to review.

✓ Click Submit
EPCS Reports: Adhoc Reports

Adhoc Report displays, which can be exported/saved if needed.
EPCS Reports: Monthly Reports

✓ Select any auto-generated monthly Report Name (e.g. CS Apr 2015)

This will show controlled substance prescriptions you have prescribed for your selected month.
EPCS Reports: Monthly Report Task

Monthly Reports can also be accessed by the Task List.

✓ Go To... the EPCS Monthly Report task (or double-click)
EPCS Admin Reports

Accessing Reports: DROI
EPCS Reports: Daily Report of Incidents

To meet Drug Enforcement Administration (DEA) requirements for Electronic Prescriptions for Controlled Substances, the main auditing activity that administrators must complete is to run the Daily Report of Incidents, or DROI.

The Daily Report of Incidents is an audit report that lists Electronic Prescriptions for Controlled Substances (EPCS) related events that have occurred in a given day. The Drug Enforcement Administration (DEA) Interim Final Rule (IFR) requires the audit report to reflect any occurrences where EPCS permissions and access were granted or modified.

The DROI provides a list of EPCS-related activities that occurred on a given day so that erroneous, not valid, or unauthorized operations are investigated to determine if a non-compliant action has occurred.

Administrators must investigate those incidents and take the applicable actions. These events might indicate that someone other than the user is attempting to gain access to the application by guessing at a password. A change in permissions indicates that an administrator has granted or revoked a permission for a user.
EPCS Reports: Daily Report of Incidents

This report should be reviewed daily and escalate suspicious events to Allscripts Support and your administration within 1 business day.

Tenant Administrators and EPCS Approvers have access to DROI.

- Access from EPCS Admin → Daily Incident Report tab
- Enter your ASA credentials
- Click Show Reports
- Click View All Events
- Browse report for date range needed
- Click View Report
- Report can be extracted/saved for tracking/audit purposes