



Electronic Prescribing System (EPCS)

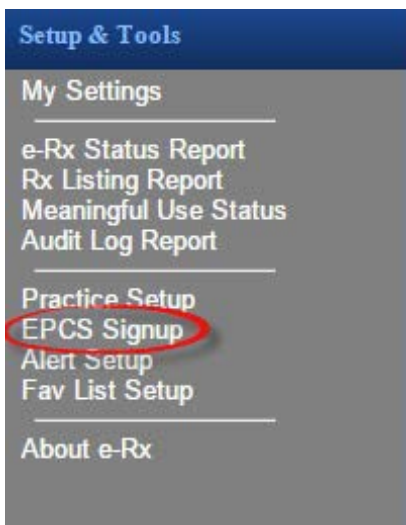
In order to use EPCS in Wells Px3, the following steps must be completed:

1. Each prescriber who wants to use EPCS completes the signup process
2. Practice sets the EPCS Access Control Settings
3. Prescribers use validated 2-factor credentials for EPCS

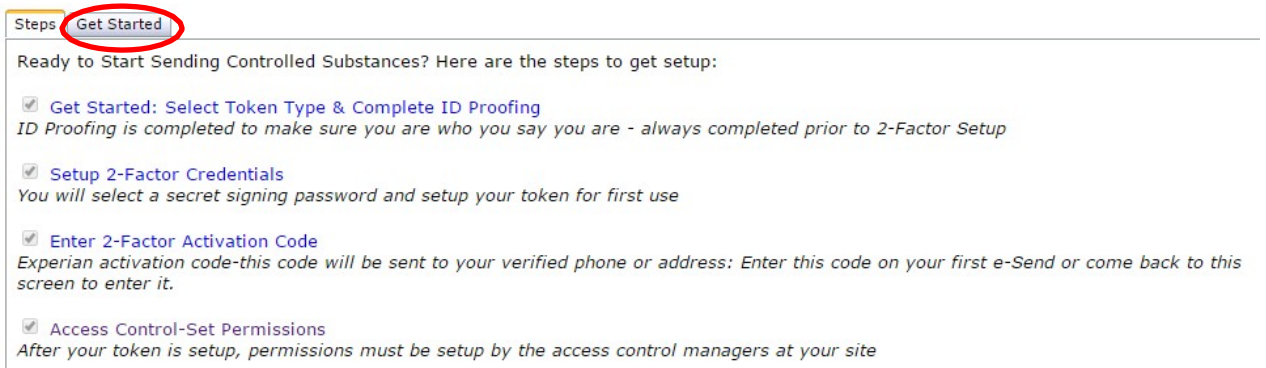
EPCS Signup

Each prescriber who wants to signup for EPCS will need to complete the following steps:

1. Go to Setup & Tools and select "EPCS Signup"



2. Click on "Get Started"



Select whether you would like to use a Software Token or a Hardware Token and click “Next”.

3.

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.

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

Next >>

Note: *The software token is recommended because you will not have to keep track of another device (you just use your phone which you already carry with you) and in most cases, it is much quicker to get signed up because you do not have to wait for the token to come in the mail.*

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 that can fit on a key chain. The hardware token contains the same software as the Mobile app, but on a small hardware device. The token will be mailed to your verified home address after you complete ID proofing and can take 5-7 business days to arrive. Additional charges may apply (contact your sales rep for details).

A. Software Tokens

i. Read the Rules and Conditions, and if you agree check the box and select “Next”.

EPCS Signup / Setup

Rules and Conditions

Per the DEA Ruling, Electronic Prescribing of Controlled Substances (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).

By clicking the I agree checkbox below, I agree to follow all laws and regulations mandated both by the DEA and the state(s) I prescribe in. I agree that I am responsible for upholding all laws and I will not use the e-Prescribing tools if I am not authorized to do so. I agree to purchase a Software token that will be installed on my smart phone

have read and agree to all terms and conditions of signup and use of EPCS services

Next >>

ii. ID Proofing – Click “Next”

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.

iii. Fill out your personal information, including the number of the cell phone you will be using for EPCS, and click on “I Agree”.

Note: Your personal information is required solely for identity proofing purposes in the Knowledge Based Authentication. Experian will use this information to compare to nationwide databases (validating your name, birth date, SSN and current home address) and formulate questions, many of which you should be the only who can answer. Your personal information is not used for any other purpose.

Identity Proofing



Please fill out the following questions for Identity Proofing:

Prescriber Name:

Email:

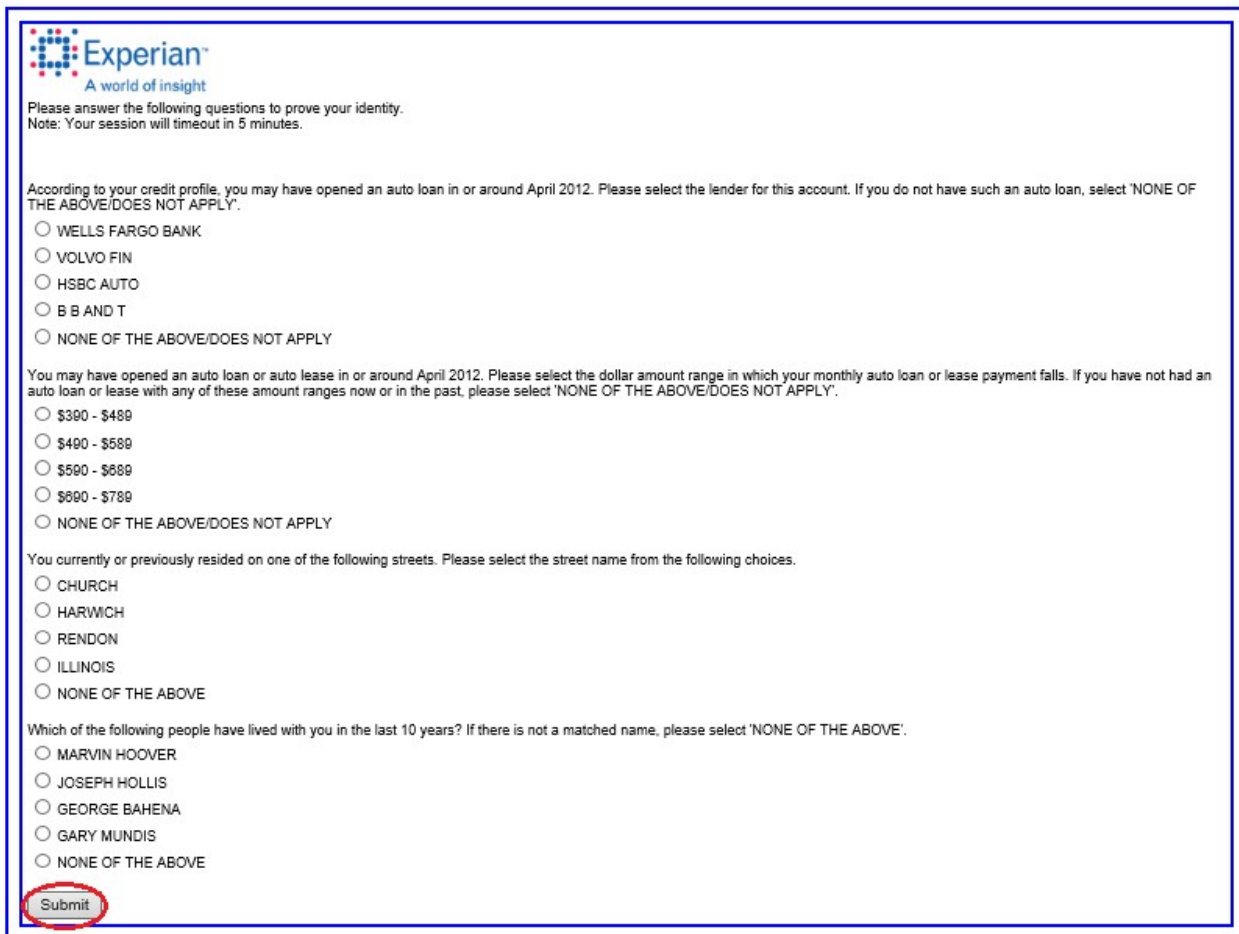
Enter your birthdate: SSN:

Current Home Address:

City/St/Zip:

Personal Cell Number: Carrier

- iv. The next screen will require you to answer a set of questions based on your history and credit to confirm your identity. You will only have 5 minutes to complete these questions. When you have answered them, click on “Submit”.



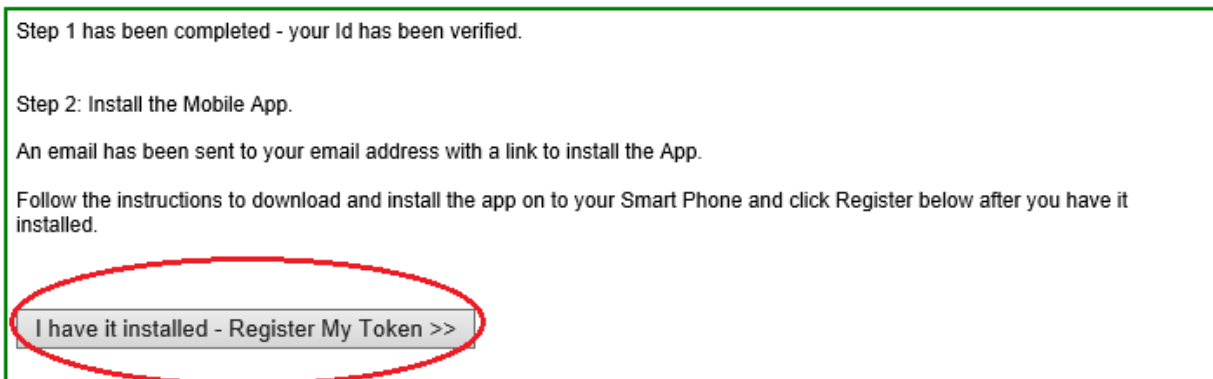
The image shows a screenshot of an Experian identity verification screen. At the top left is the Experian logo with the tagline "A world of insight". Below the logo, it says "Please answer the following questions to prove your identity. Note: Your session will timeout in 5 minutes." The main content consists of three sections of questions, each with radio button options:

- Question 1: "According to your credit profile, you may have opened an auto loan in or around April 2012. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'." Options: WELLS FARGO BANK, VOLVO FIN, HSBC AUTO, B B AND T, NONE OF THE ABOVE/DOES NOT APPLY.
- Question 2: "You may have opened an auto loan or auto lease in or around April 2012. Please select the dollar amount range in which your monthly auto loan or lease payment falls. If you have not had an auto loan or lease with any of these amount ranges now or in the past, please select 'NONE OF THE ABOVE/DOES NOT APPLY'." Options: \$390 - \$489, \$490 - \$589, \$590 - \$689, \$690 - \$789, NONE OF THE ABOVE/DOES NOT APPLY.
- Question 3: "You currently or previously resided on one of the following streets. Please select the street name from the following choices." Options: CHURCH, HARWICH, RENDON, ILLINOIS, NONE OF THE ABOVE.

At the bottom, there is a question: "Which of the following people have lived with you in the last 10 years? If there is not a matched name, please select 'NONE OF THE ABOVE'." Options: MARVIN HOOVER, JOSEPH HOLLIS, GEORGE BAHENA, GARY MUNDIS, NONE OF THE ABOVE. A "Submit" button is located at the bottom left of the form area.

- v. When your identity has been verified, you will see the screen below. You are now ready to install the mobile app on your mobile phone. The link to download this app is sent to your email address. Click on this link from your phone or just type the link in your phone browser or app store to install it.

When you have downloaded and installed the app on your Phone, click on “I have it installed – Register My Token”.



The image shows a confirmation screen with a green border. It contains the following text:

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

Step 2: Install the Mobile App.

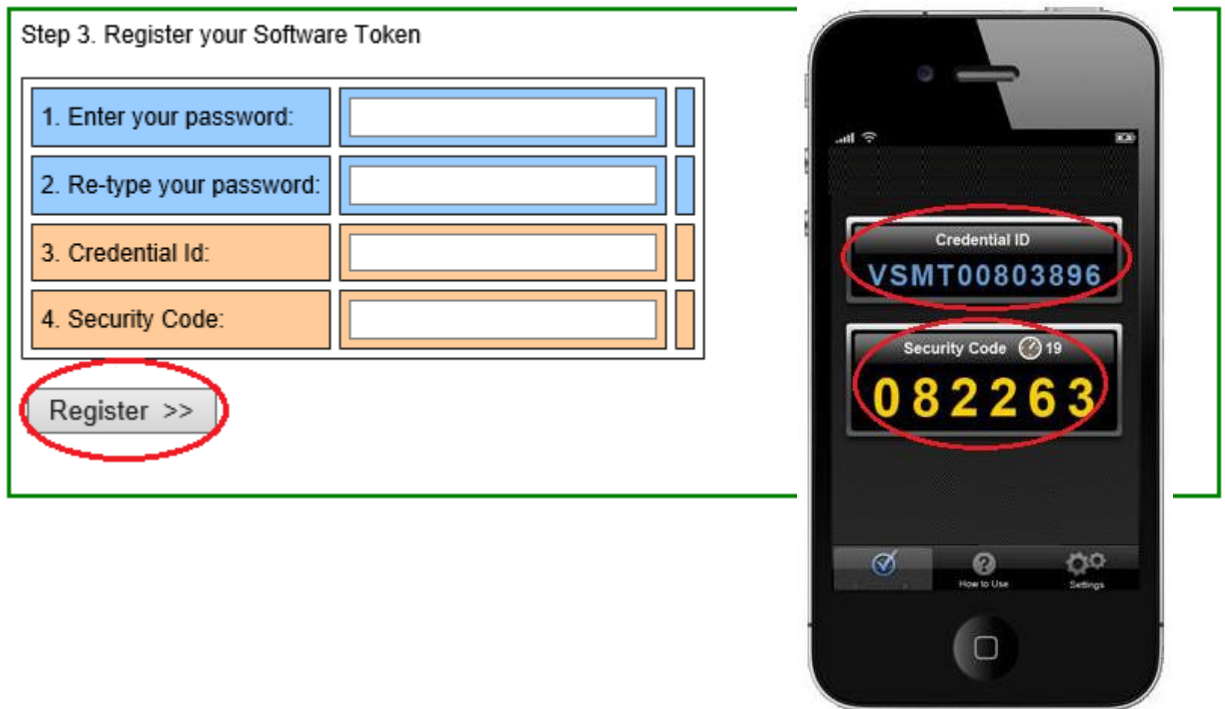
An email has been sent to your email address with a link to install the App.

Follow the instructions to download and install the app on to your Smart Phone and click Register below after you have it installed.

At the bottom, there is a button labeled "I have it installed - Register My Token >>" which is circled in red.

- vi. To register your Software Token, you will need to select a sign off password that you will use each time you sign and send a controlled substance. Be sure to select a strong password that you can remember (do not share it or write it down anywhere someone could find it. It is recommended you use letters, numbers and/or symbols.)

You will also need to enter your Credential ID and Security Code which are found in the mobile app. When you have entered these, click on “Register”.



- vii. You will then see a verification screen confirming your account has been activated for EPCS. Click “Finish/Close”.

Please note: The first time you use your 2 Factor credentials you will be required to enter an ID Verification Code from Experian. An agent will mail and/or call your home address/phone of record with this code. This extra security step (which is required per the DEA ruling/law) is to keep your identity and credentials safe. For example, even if an identity theft stole your wallet, got a copy of your DEA cert and stole your mail with your bills in it (giving him information about your credit history for the KBA), he wouldn't be able to answer your home phone to get this final code.

Congratulations! Your digital certificate token has been verified.

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

The first time you use your 2 Factor credentials you will be required to enter an ID Verification Code from Experian. We will mail and/or call your home address/phone of record with this code.

Click Finish to close.

B. Hardware Tokens

- i. Read the Rules and Conditions, and if you agree check the box and select "Next".

EPCS Signup / Setup

Rules and Conditions

Per the DEA Ruling, Electronic Prescribing of Controlled Substances (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).

By clicking the I agree checkbox below, I agree to follow all laws and regulations mandated both by the DEA and the state(s) I prescribe in. I agree that I am responsible for upholding all laws and I will not use the e-Prescribing tools if I am not authorized to do so.

I agree to purchase a hardware token that will be mailed to my verified home address and then used each time I e-Send controlled substances. I agree to pay any fees associated with use of the token (fees will be included on your next e-Prescribing Invoice). I

I have read and agree to all terms and conditions of signup and use of EPCS services

Next >>

- ii. ID Proofing – Click "Next"

2-Factor Token

Setup Steps:

1. ID Proofing
2. After you complete ID Proof we will mail the Key Fob to your verified home address
3. When you receive it, come back to this screen and Register/Setup your Key Fob token

Step 1: ID PROOF


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

Next

- iii. Fill out your personal information, including the number of the cell phone you will be using for EPCS, and click on “I Agree”.

Note: Your personal information is required solely for identity proofing purposes in the Knowledge Based Authentication. Experian will use this information to compare to nationwide databases (validating your name, birth date, SSN and current home address) and formulate questions, many of which you should be the only who can answer. Your personal information is not used for any other purpose.

Identity Proofing



Please fill out the following questions for Identity Proofing:

Prescriber Name:

Email:

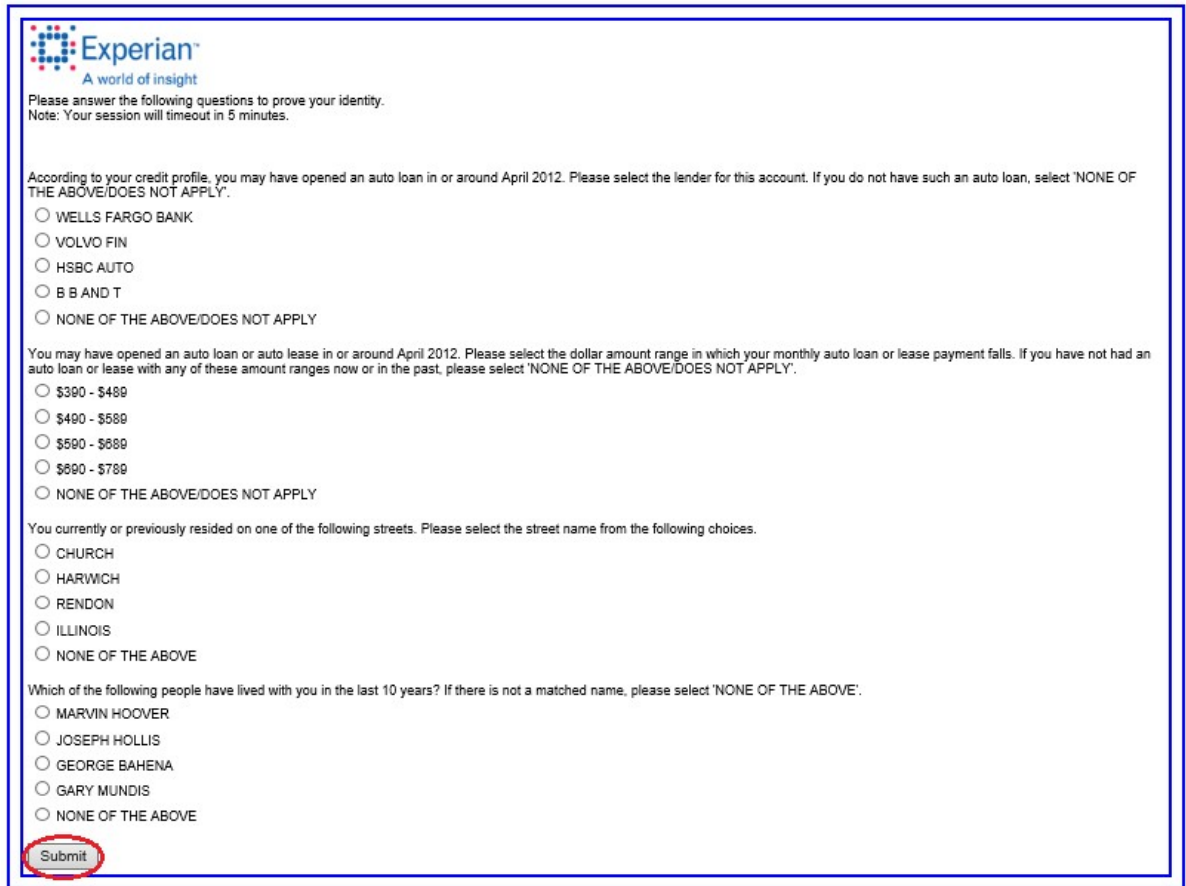
Enter your birthdate: SSN:

Current Home Address:

City/St/Zip:

Personal Cell Number:

- iv. The next screen will require you to answer a set of questions based on your history and credit to confirm your identity. You will only have 5 minutes to complete these questions. When you have answered them, click on “Submit”.

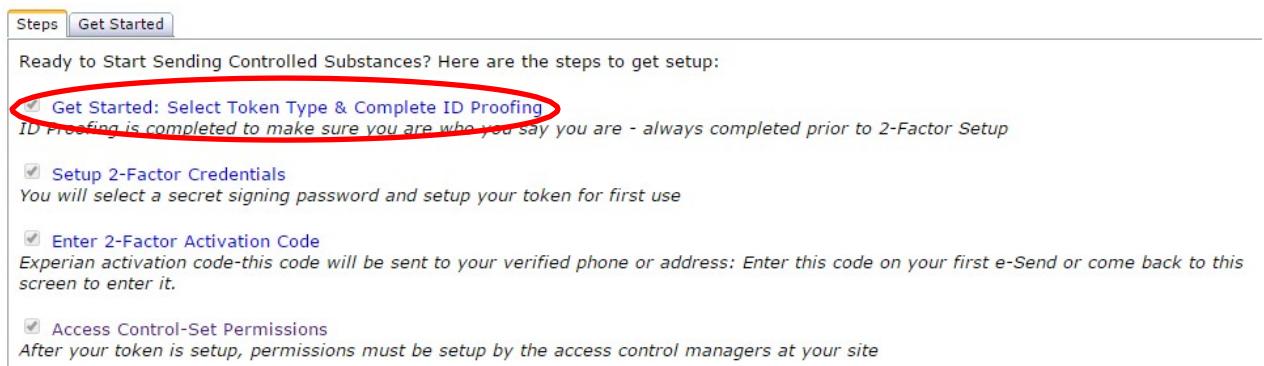


The image shows a screenshot of an Experian identity verification screen. At the top left is the Experian logo with the tagline "A world of insight". Below the logo, it says "Please answer the following questions to prove your identity. Note: Your session will timeout in 5 minutes." The screen contains four sections of questions, each with radio button options:

- Section 1: "According to your credit profile, you may have opened an auto loan in or around April 2012. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'." Options: WELLS FARGO BANK, VOLVO FIN, HSBC AUTO, B B AND T, NONE OF THE ABOVE/DOES NOT APPLY.
- Section 2: "You may have opened an auto loan or auto lease in or around April 2012. Please select the dollar amount range in which your monthly auto loan or lease payment falls. If you have not had an auto loan or lease with any of these amount ranges now or in the past, please select 'NONE OF THE ABOVE/DOES NOT APPLY'." Options: \$399 - \$499, \$499 - \$599, \$599 - \$699, \$699 - \$799, NONE OF THE ABOVE/DOES NOT APPLY.
- Section 3: "You currently or previously resided on one of the following streets. Please select the street name from the following choices." Options: CHURCH, HARWICH, RENDON, ILLINOIS, NONE OF THE ABOVE.
- Section 4: "Which of the following people have lived with you in the last 10 years? If there is not a matched name, please select 'NONE OF THE ABOVE'." Options: MARVIN HOOVER, JOSEPH HOLLIS, GEORGE BAHENA, GARY MUNDIS, NONE OF THE ABOVE.

At the bottom left, there is a "Submit" button circled in red.

- v. When your identity has been verified, you will see the screen listed under VII. You are now ready to register your hardware token.
- vi. Keep in mind that you will need to wait until you receive the hardware token in the mail to complete this step.
 1. If you need to wait for your token, you will need to come back to this screen at a later date.
 2. When you come back, just click EPCS Signup and from the checklist select Setup 2-Factor credentials to pick up where you left off.



The image shows a screenshot of a "Steps" menu with "Get Started" selected. Below the menu, there is a heading: "Ready to Start Sending Controlled Substances? Here are the steps to get setup:". A checklist follows:

- 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.
- Access Control-Set Permissions**
After your token is setup, permissions must be setup by the access control managers at your site

- vii. When you have your token in hand and are ready to get it registered click “I have it– Register My Token”.

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

Step 2: Your Key Fob will be mailed to your verified home address.

This can take 5-7 business days to receive it. If you have not received it within 7 business days please call support so we can track it.

After you receive the key fob please return to this Setup Screen and click the button below:

I have it - Register My Token >>


- viii. To register your Hardware Token, you will need to select a sign off password that you will use each time you sign and send a controlled substance. Be sure to select a strong password that you can remember (do not share it or write it down anywhere someone could find it. It is recommended you use letters, numbers and/or symbols.)

You will also need to enter your Credential ID and Security Code. To generate a code press the white button on the front of the key fob device. The Credential ID is located by the barcode on the back of the device. When you have entered these, click on “Register”.

Step 3. Register your Software Token

1. Enter your password:	<input type="text"/>
2. Re-type your password:	<input type="text"/>
3. Credential Id:	<input type="text"/>
4. Security Code:	<input type="text"/>

Register >>



- ix. You will then see a verification screen confirming your account has been activated for EPCS. Click “Finish/Close”.

Please note: The first time you use your 2 Factor credentials you will be required to enter an ID Verification Code from Experian. An agent will mail and/or call your home address/phone of record with this code. This extra security step (which is required per the DEA ruling/law) is to keep your identity and credentials safe. For example, even if an identity theft stole your wallet, got a copy of your DEA cert and stole your mail

with your bills in it (giving him information about your credit history for the KBA), he wouldn't be able to answer your home phone to get this final code.

Congratulations! Your digital certificate token has been verified.

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

The first time you use your 2 Factor credentials you will be required to enter an ID Verification Code from Experian. We will mail and/or call your home address/phone of record with this code.

Click Finish to close.

EPCS Access Control Setup

The EPCS Access Control screen allows you to setup the security settings and permissions for EPCS.

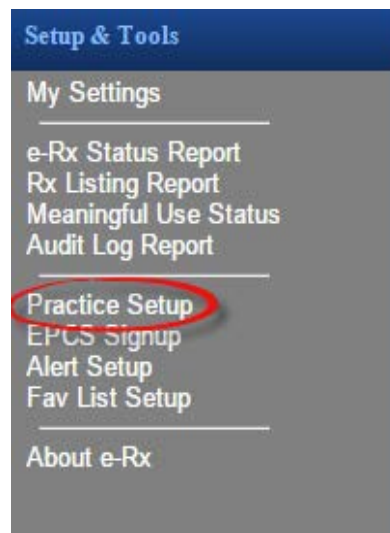
Per the DEA rule for Controlled Substance Access Control, two users are required in order to save changes to this screen. You must get a second user that will authorize the changes. This secondary user must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials.

*For practices with only one prescriber signed up for EPCS, you must have the authorized user who is **not** the EPCS prescriber log in, so that the EPCS prescriber with the token may sign off on the changes. For example:

- Nurse Laura Johnson has agreed to be a legal authenticator and Access control manager at the practice – She logs in and opens Access Control Setup
- Doctor Sara Smith has signed up for EPCS and will also authorize which staff have permissions, she will “sign off” on the EPCS permissions
- Nurse Laura opens Access Control – Sets which users have permissions, Selects Doctor Sara as the sign off person and clicks Save- Doctor Sara then uses her 2 Factor Sign off (from EPCS setup) to sign off on the changes.

Use the following steps to setup and make changes to EPCS Access Control:

1. Login as an Admin/User who has access to Practice Setup Administrative functions
2. Go to **Setup & Tools**, click **Practice Setup**



- Go to the **Settings** Tab and click **Open Access Control**

Practice Setup

Acct # Practice/Company Name:

Patient Data Emergency Access Authorization Code:
(leave blank for no emergency access to PHI)

Inactivity Auto-Logout Minutes:
(enter # of minutes sessions can sit idle before auto logging out)

Auto Update Meds Historical When Expired:
(system will automatically change Current Rx status to Historical when days supply + (days supply * refills) is up)

EPCS Access Control Setup **Open Access Control**

- Select the Prescriber who will Approve Changes/Sign off (must be a Prescriber with 2F besides you) from the dropdown

Electronic Prescription Controlled Substances - Logical Access Control Setup

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. This secondary user must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials.

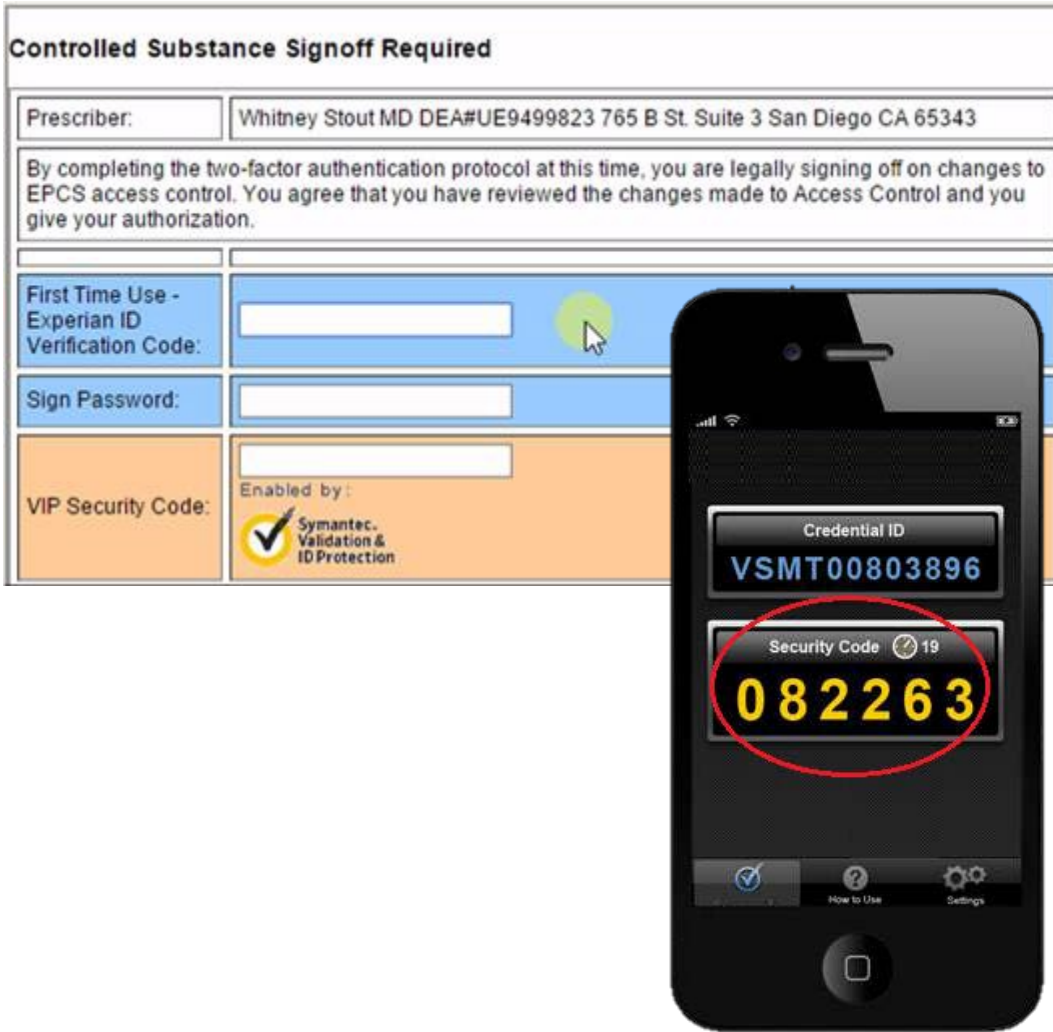
Select the Prescriber who will Approve Changes/Sign off (must be a Prescriber with 2F besides you):

- In the grid at the lower section, check the box for each user that will have permissions or help with managing EPCS.

			Has Validated Token	Access Control Manager	Authorization Verifier	Allowed to check Ready to Sign EPCS	Allowed to Sign and Send EPCS
Michael	Cure	MD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
John	Doe	Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nurse	Doe	Nurse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
sally	jenkins	Nurse	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bob	Jones	MD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ndailikana	Kandjaba	MD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

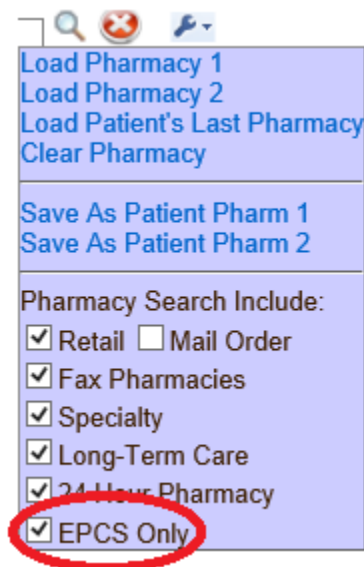
- Access Control Managers: Designate at least two users who will be in charge of managing access control (who can edit this screen) (at least one user must be a Prescriber who has signed up for EPCS).
- Authorization Verifier: Select which Access Control Manager(s) will be in charge of verifying DEA 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:
 - The Prescriber's token or password is lost, stolen or compromised.
 - DEA registration expires.

- c) DEA registration is revoked, terminated or suspended
 - d) no longer authorized e.g. leaves the practice
- C. 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.
- D. 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).
6. Press Save to save the changes. This will popup the 2 Factor Credentials Sign off for the provider selected at the top to approve the changes. The provider will need to either open their mobile app or use the key fob token and enter the password for final approval of the permissions.
- a. You will be prompted to enter your ID Verification Code. The verification code is the number that was provided by either verified phone number or mailed to a verified home address.
 - b. The password is the sign password created during EPCS signup.
 - c. The VIP Security code is the code or token generated by your key fob or software token app.



Using EPCS

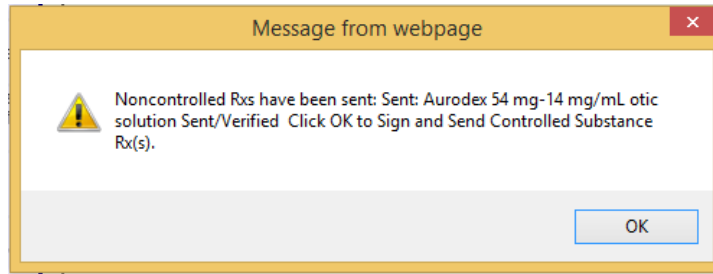
1. When writing a prescription for a controlled substance, if the Prescriber has not signed up for two factor credentials or has not been granted access to use it, the system will still default the Controlled drug to "Print" and "e-Send" will be disabled.
2. If the Prescriber has both been issued valid two factor credentials and granted access in the Access Control Screen, the system will allow using "e-Send".
3. For controlled substances, the system allows you to write, preview and click e-Send, no different than non-controlled drugs. The steps for sending are:
 - a. First make sure that the Pharmacy selected allows/is registered to receive controlled substances – you can only e-Send to Pharmacies that have signed up. When sending a controlled substance, the pharmacy search will default to only show pharmacies that allow EPCS.



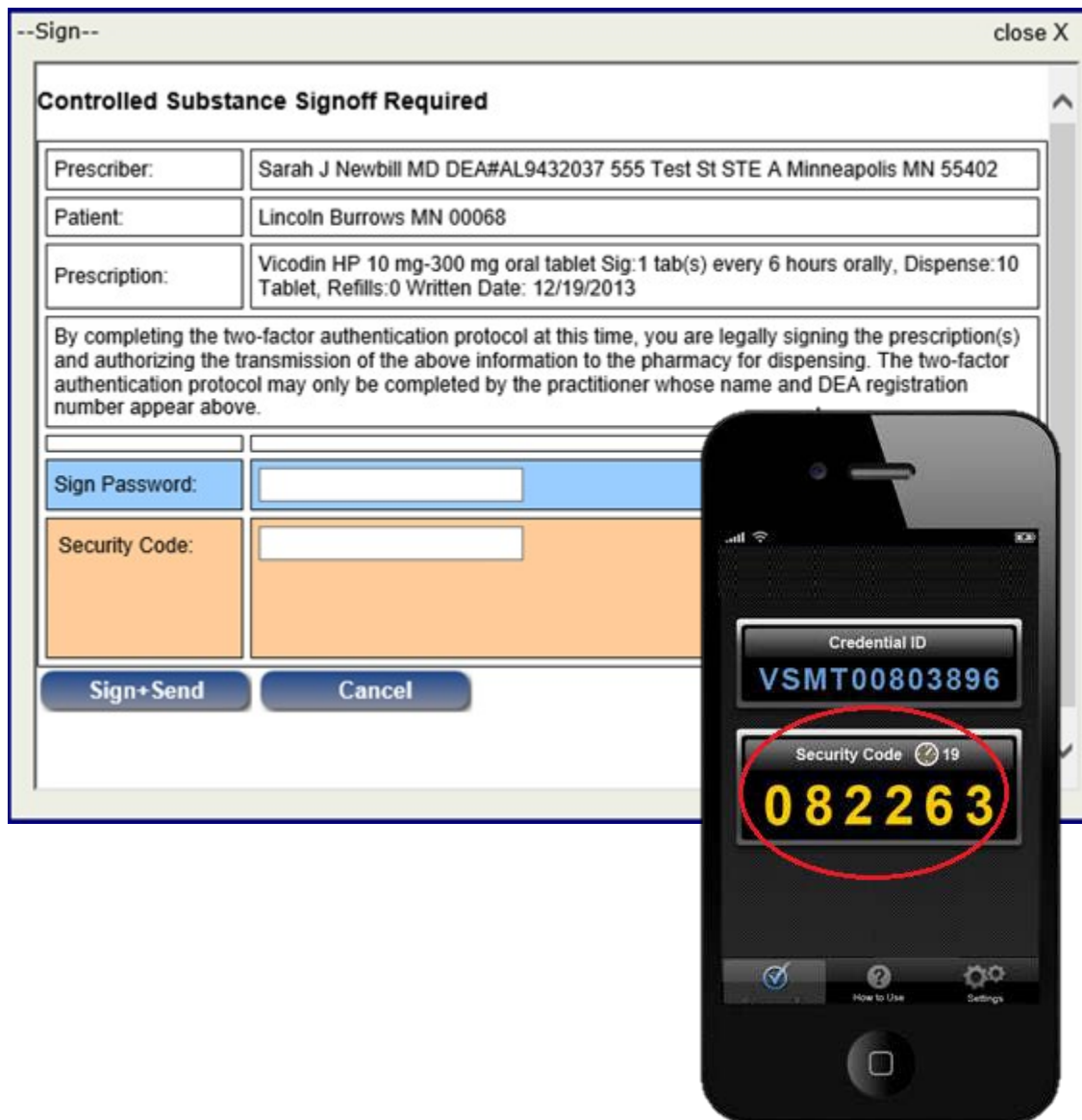
The Pharmacies that are enabled for EPCS also show EPCS in the last column during the search:

➔	Walgreen Drug Store	99999 WADSWORTH BLVD Deerfield TX (cross-st: CORNER OF THE IC+ TEST ROOM)	3034637719 FX:3034637765	Retail NewRx Refill	EPCS
➔	Walgreen Drug Store	SYSTEM TEST 300 WILMOT DESPLAINS AZ (cross-st: CORNER OF MAIN and NAVADA ST)	7004637719 FX:3034637765	Retail NewRx Refill	EPCS
➔	Walgreen Drug Store	35 CALLE JUAN C BORBON GUAYNABO PR (cross-st: NEC Juan Carlos & Las Cumbres)	7872873725 FX:7872873711	Retail TwentyFourHourStore NewRx Refill	
➔	Walgreen Drug Store	111 addr1 test lincolnshire IL (cross-st: CORNER OF THE IC+ TEST ROOM)	3038887719 FX:3054657765	Retail NewRx Refill	

- b. Click “e-Send” as you normally would. Any non-controlled substances in the order will be sent first and you will receive a confirmation message that they were sent(if any). Click “OK”.



- c. The two factor “Sign” screen will then open.
 - i. If you are using a Soft Token, enter your token password and the Security Code from the app you installed on your phone.



- ii. If you are using a Hard Token, press the button on the key fob device to generate the security code. Then click on “Sign + Send”.



- d. You will then receive a sent confirmation message.

