ePrescribe Setup Guide

For EndoVision

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1-800-DSCHEIN

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Introduction & Setup

ePrescribe allows you to submit prescriptions to pharmacies online. The ePrescribe features of EndoVision are available as an add-on. To get this add-on, you must purchase a license to enable ePrescribe in EndoVision. The online access to ePrescribe is a third-party service provided by Veradigm (formerly Allscripts). This guide will help you understand how to set up and use the ePrescribe features.

This chapter covers several topics about how to activate ePrescribe and set up locations and users to use ePrescribe. The first four items below are tasks that you must perform in EndoVision before you begin configuring ePrescribe:

- Meeting the Pre-requisites
- Activating ePrescribe
- Configuring Practice Information
- Configuring Provider Information

Important: All of the tasks above should be completed before a trainer starts the training with your office. For information about training, contact Customer Support at 800-323-3370, Option 2.

These final tasks need to be done in ePrescribe after purchasing and enabling ePrescribe:

- Enabling Locations
- Adding Users
- Preparing for First-time Use
- Linking an ePrescribe Account
- Registering for EPCS
- Adding Sites in ePrescribe

Note: ePrescribe refers to locations (or clinics) as "sites."

Meeting the Pre-requisites

Before you attempt any setup and configuration of ePrescribe, you must meet the following pre-requisites:

1. Purchase ePrescribe licenses:
   - Call your sales manager, or
   - Call the Sales department at 800-680-6902.
2. Install EndoVision14.0 or later. To take advantage of all the functionality described in this guide, you must install the latest version of EndoVision.
3. Have passwords enabled and set up in EndoVision.

* Make sure these requirements are met before a trainer starts the training with your office.

Important: If a provider has been signed up with ePrescribe previously and already has an active Electronic Prescribing of Controlled Substances (EPCS) account through ID.me, that provider must link his or her EPCS account to ePrescribe instead of signing up for an account. The provider will need his or her Veradigm (formerly Allscripts) security account credentials, which are the login ID and password associated with the provider's ePrescribe user account.

Activating ePrescribe

The steps in this section must be completed with the help of an ePrescribe Adoption Specialist or EndoVision Customer Support (800-323-3370, Option 2).

Configuring Practice Information

You must configure your practice information in EndoVision to use ePrescribe. For more information, see the topic "Adding and editing practice locations" in the EndoVision Help.

Configuring Provider Information

You must configure information for all providers who you want to enable to use ePrescribe. For more information, see the topic "Adding and editing practice locations" in the EndoVision Help.

Adding Users

Be aware that the first time a user who can prescribe attempts to use ePrescribe, he or she must complete an identity verification process through Veradigm (formerly Allscripts; the third-party vendor that provides the ePrescribe services), which consists of filling out an online form. For more information about this process, see "Opening ePrescribe" in the Usage chapter.

Additionally, if a user can prescribe controlled substances, he or she must complete a registration process for Electronic Prescribing of Controlled Substances (EPCS). For information about this process, see "Registering for EPCS" in this chapter.

To add a user

1. In EndoVision, from the File menu, click Locations. and then click **Setup**.

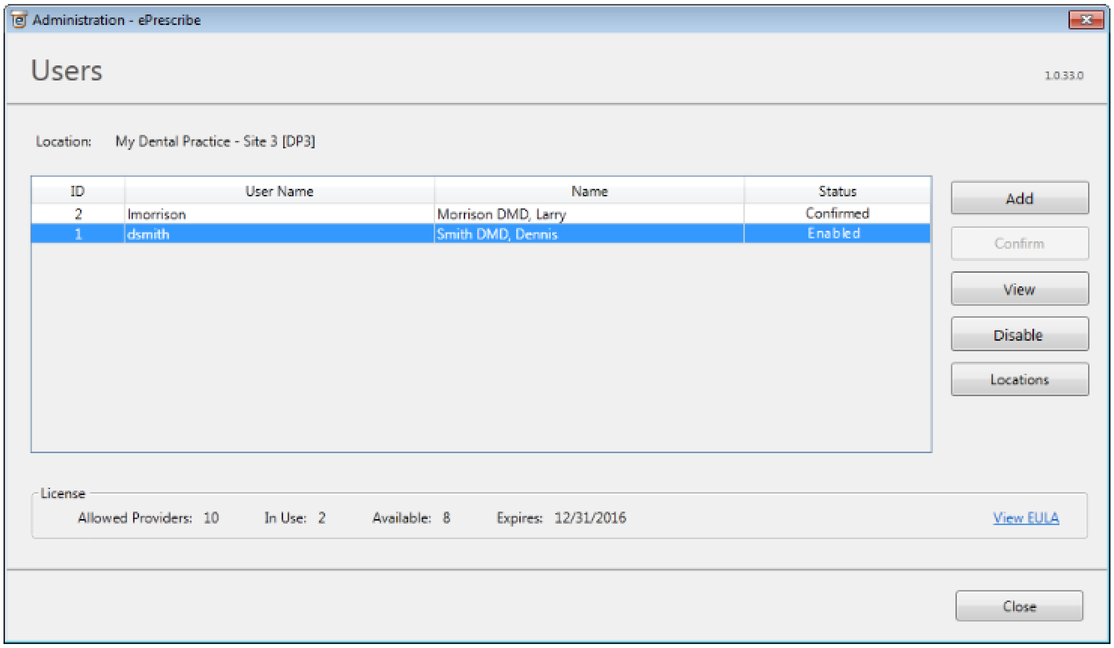
   The **Practice Locations Table** dialog box appears.

2. Click **e-Rx Admin**.

   The **Administration - ePrescribe** window appears.

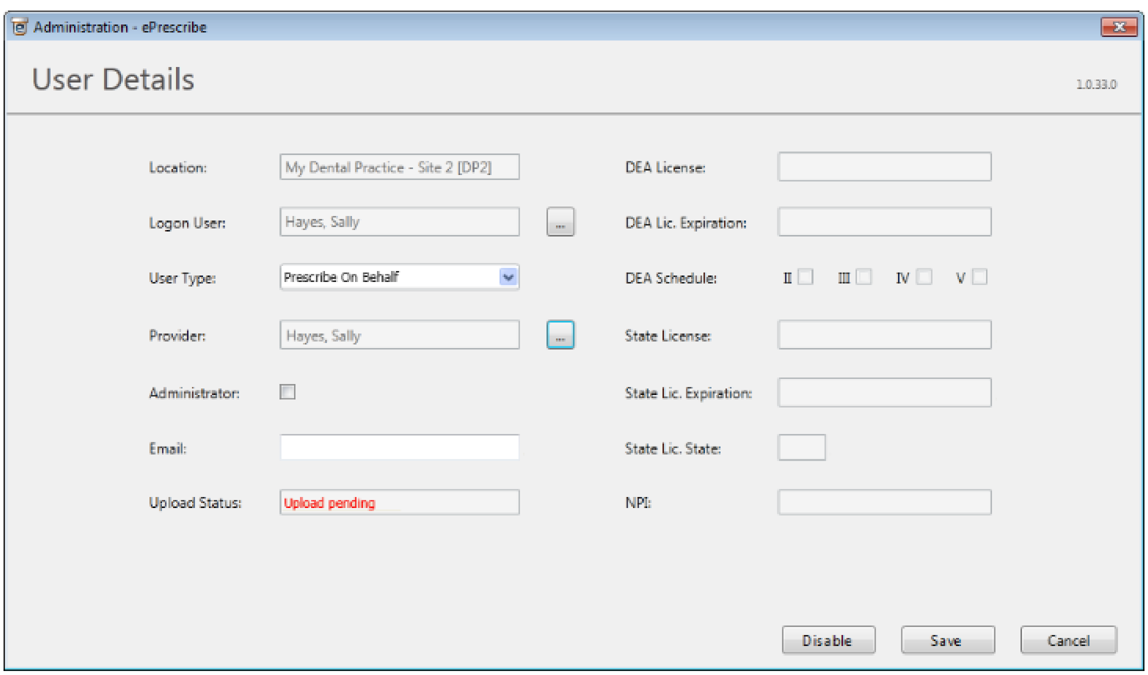
3. Click **Users**.

   The **Users** page appears.



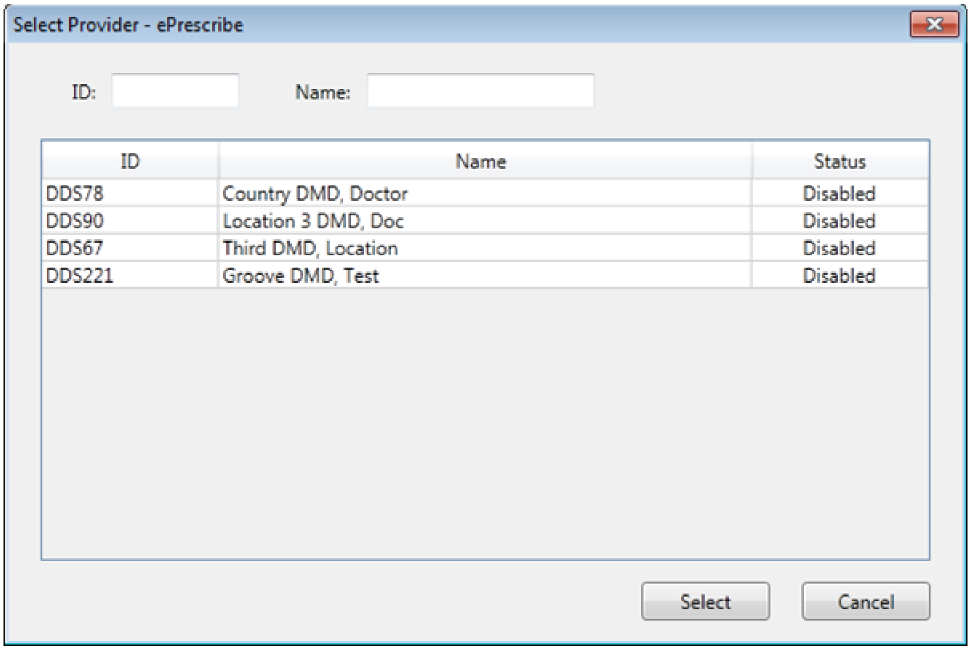
4. Click **Add**.

   The **User Details** page appears.



Important: A yield symbol indicates that required data has not been entered. If this symbol appears next to the **Email**, **DEA License**, **DEA Lic. Expiration**, **State License**, **State Lic. Expiration**, **State Lic. State**, or **NPI** box, close ePrescribe, enter the appropriate provider information, and then return to this point.

5. Click the **User** search button to select a provider or a staff member.



6 Select the provider you want to make an administrator from the list, and then click **Select**.

7. Select the **Administrator** check box if the user is to be an administrator of ePrescribe.

   Note: If your organization has multiple providers who prescribe controlled substances, it is recommended that you have a user who is not one of those providers be an ePrescribe administrator.

8. Click **Save**.

Important: After you enable a provider's user account to use ePrescribe, if the provider has been signed up with ePrescribe previously and already has an active Electronic Prescribing of Controlled Substances (EPCS) account through Zentry (formerly Verizon) or ID.me, skip "Preparing for First-time Use" on page 5. That provider must, instead, link his or her EPCS account to ePrescribe as explained in "Linking an ePrescribe Account" on page 33. The provider will need his or her Veradigm (formerly Allscripts) security account credentials, which are the login ID and password associated with the provider's ePrescribe user account.

Preparing for First-time Use

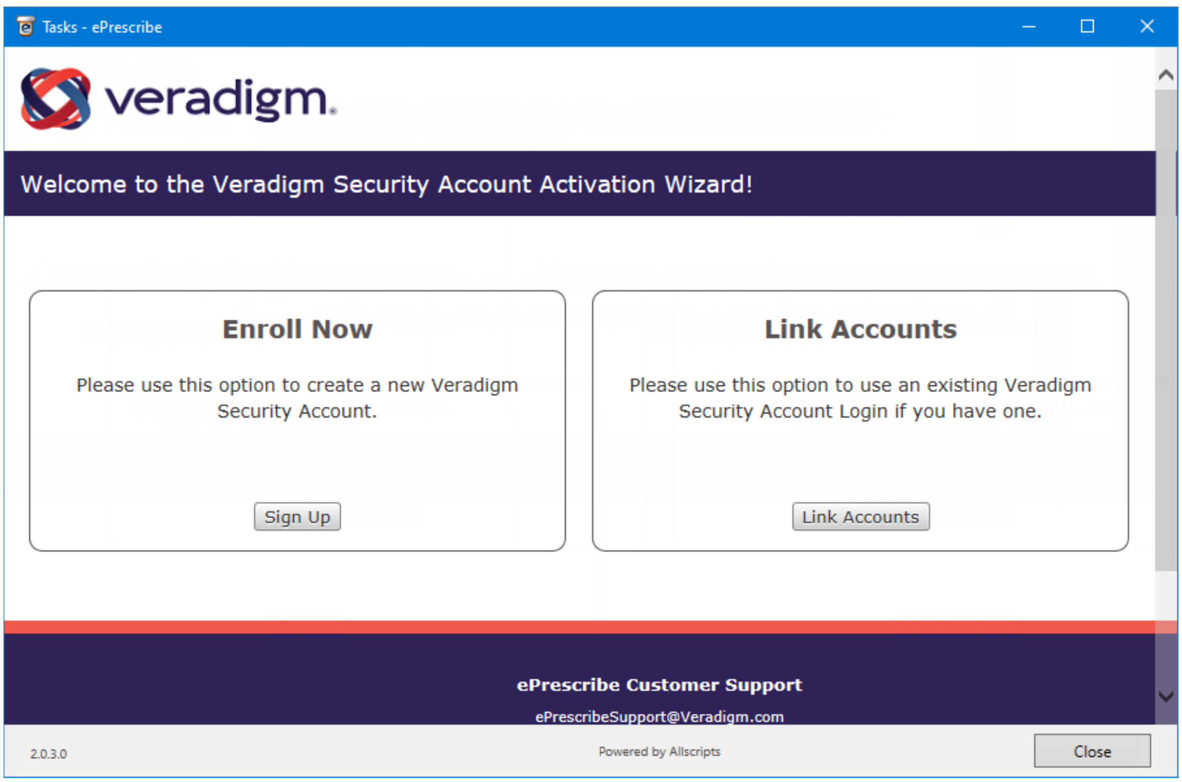
The first time a user who has been enabled to use ePrescribe opens ePrescribe, he or she must go through an identity verification process and accept the End User License Agreement (EULA) for Veradigm (formerly Allscripts) ePrescribe. Providers who prescribe medications must complete additional identity verification steps.

Also, providers who prescribe controlled substances must complete the identity verification process explained in this section before they can register for Electronic Prescribing of Controlled Substances (EPCS) as explained in “Registering for EPCS” in this chapter.

To prepare for first-time use

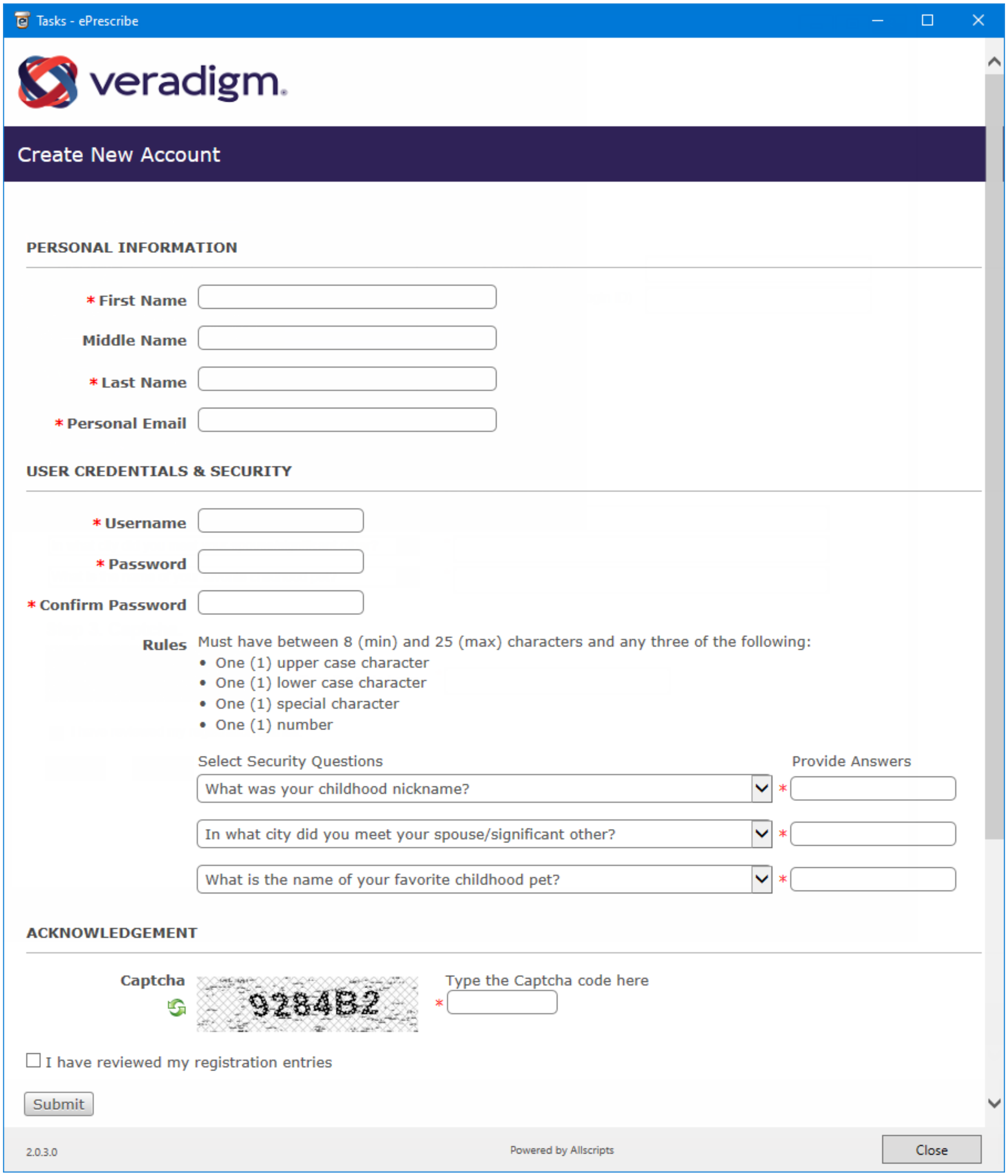
1. Log in to EndoVision with a user account that has been enabled to use ePrescribe. Then, from the Office Manager, click the **Electronic Rx Task Mode** button on the toolbar to open ePrescribe.

   If you have not used ePrescribe yet, the **Welcome to the Veradigm Security Account Activation Wizard!** page appears.



2. Click **Sign Up**.

The Veradigm security account information page appears.



3. Complete the form.

   Notes:

   - Providers must use their own personal email addresses.
   - After you specify a user name, when you click outside the box, a green check mark appears if that user name is available.

4. Click **Submit**.

   A message appears, stating that your shield account is set up.

5. Close and reopen ePrescribe (in task mode).

One of the following occurs:

- If you are logged in as a prescriber, the Welcome to Veradigm - ePrescribe page appears. Proceed to step 6.
- If you are logged in as a non-prescriber (staff or prescribe-on-behalf user), the End User License Agreement page appears. Skip to step 5 under “Finishing ePrescribe Setup.”

6. Read the instructions for verifying your identity.

   Important: To verify your identity through ID.me, you must have the following:

   - A smartphone or tablet with iOS 10.3 or later, or Android 6 or later. The smart device must also have a camera and Web browser and be able to receive text messages.
   - Make sure you have the ID.me Authenticator app installed on your smart phone or tablet and have the proper identification, and then c
   - The ID.me Authenticator app (which is used for two-factor authentication) installed on your smart phone or tablet. You can download this app from the Apple Store or Google Play.
   - Veradigm (formerly Allscripts) security account credentials. These credentials are the login ID and password that are associated with the provider’s ePrescribe user account.
   - A personal or a private email address. A group or shared email is not allowed.
   - A valid driver’s license, a state ID, a passport, or a passport card. Alternatively, you can answer questions about your credit history.
   - A Social Security Number.

7. Close ePrescribe.

   Important: When you create your ID.me account, you’ll need to take pictures for identification, so you’ll need to complete the remaining steps in this chapter from your smart phone or tablet.

8. Using the Google Chrome or Microsoft Edge browser on your smart phone or tablet, go to **eprescribe.allscripts.com**.

9. Use your ePrescribe user name and password (created in steps 1-4) to log in to the Veradigm website.

The **Welcome to Veradigm - ePrescribe** page appears.

10. Tap **Continue**.

    The **Security Account Login** page appears.

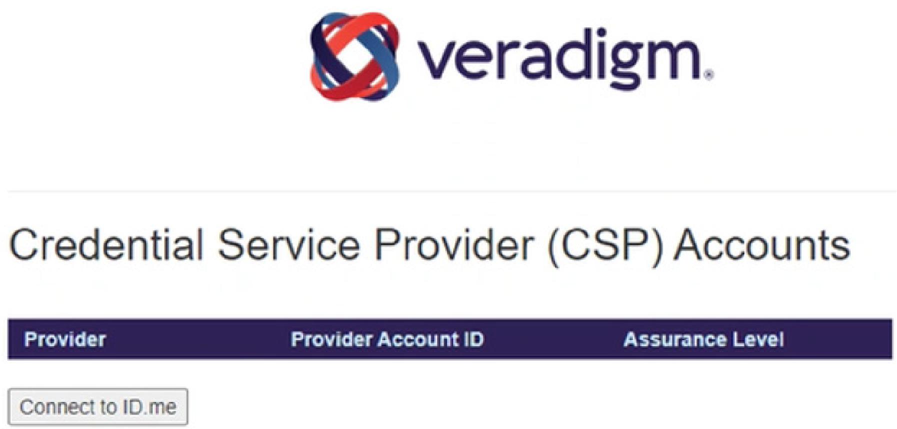
11. Enter your ePrescribe username and password that you just created in steps 1-4, and then tap **Log In**.

Creating an ID.me Account

After creating your Veradigm security account, you'll need to create an ID.me account (if you don't already have one) and link it to the Veradigm security account you just created.

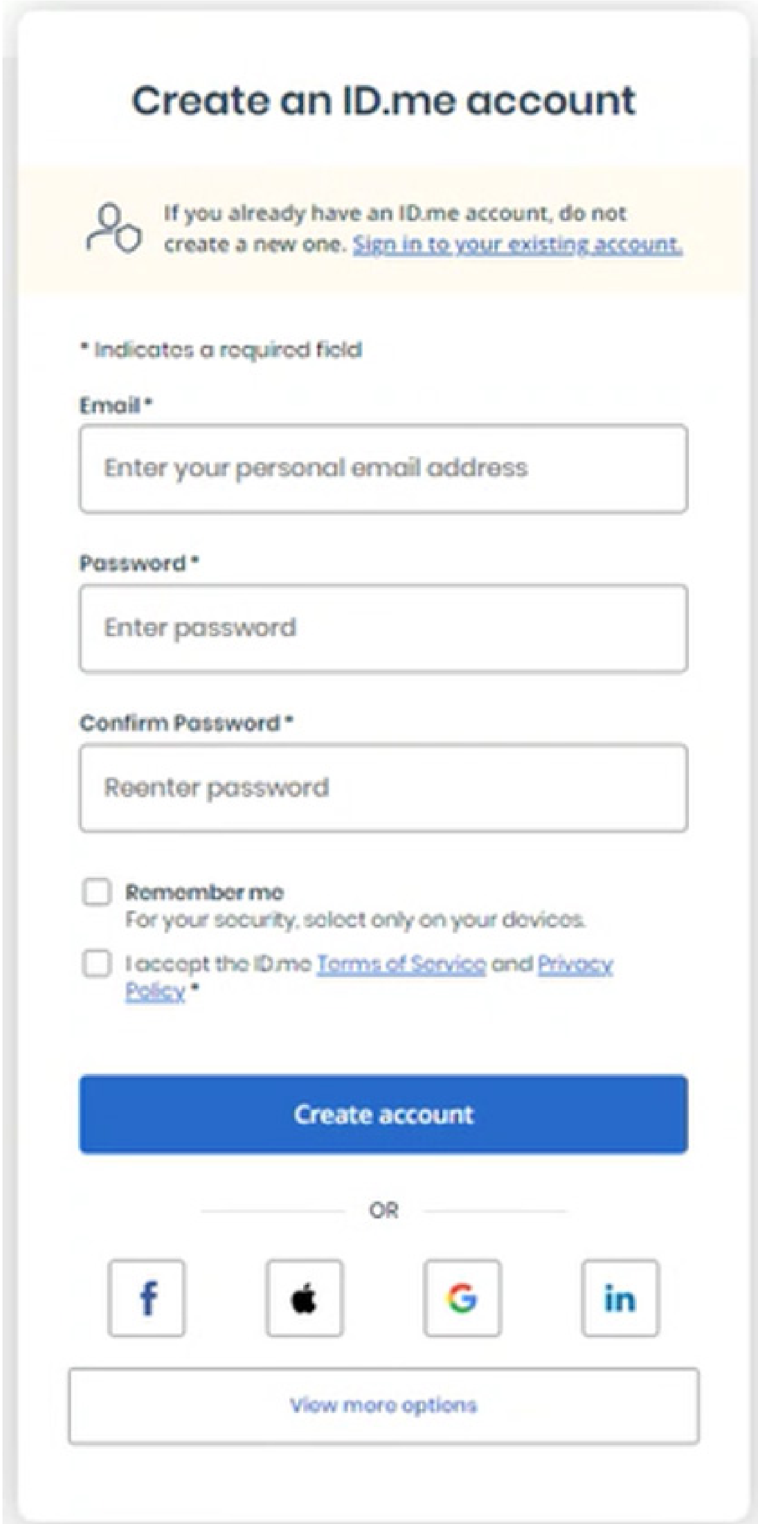
Note: You will use these same ID.me account steps if you link to an existing ePrescribe account or register for EPCS, so this "Creating an ID.me Account" section is referenced again in those later sections of this guide.

After logging in to your ePrescribe security account, the following page appears.



1. Do one of the following:
   - If you already have an ID.me account, select the account from the list and then tap **Connect to ID.me**. Skip all the way to step ????? where you will give consent to ID.me to use your camera for a selfie photo.
   - If you do not have an ID.me account, create one:
     a. Tap **Connect to ID.me**.

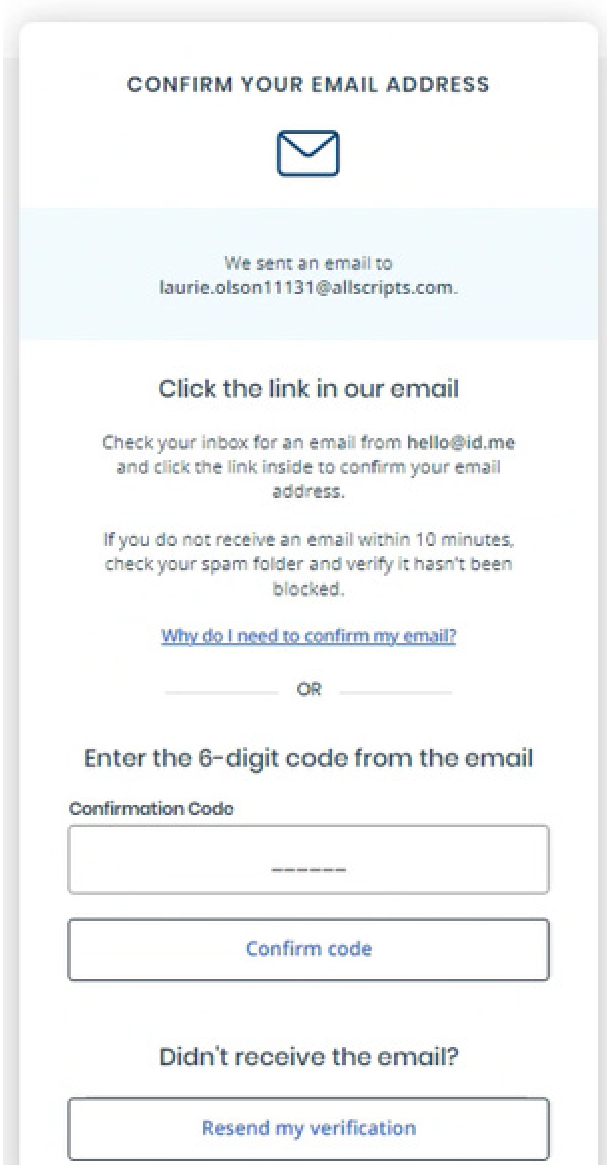
The **Create an ID.me account** page appears.



b. Enter your email address in the **Email** box, enter a password in the **Password** and **Confirm Password** boxes, and select the **I accept the ID.me Terms of Service and Privacy Policy** check box.

c. Tap **Create account**.

The **Confirm Your Email Address** page appears.

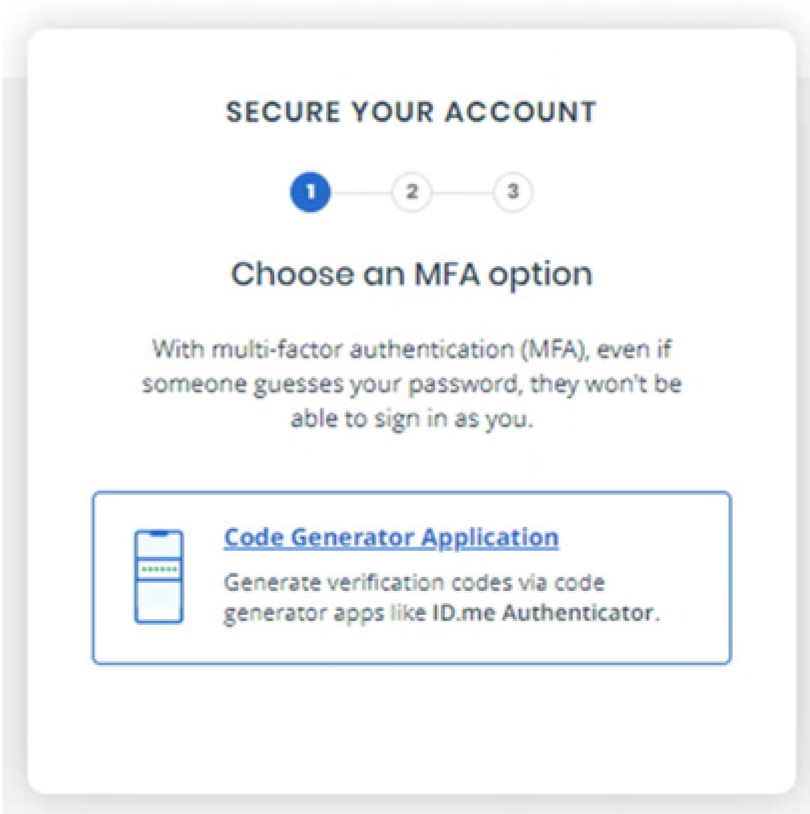


d. Do one of the following:

- Tap the link in the confirmation email you received.
- Under **Confirmation Code**, enter the 6-digit confirmation code from the email you received.

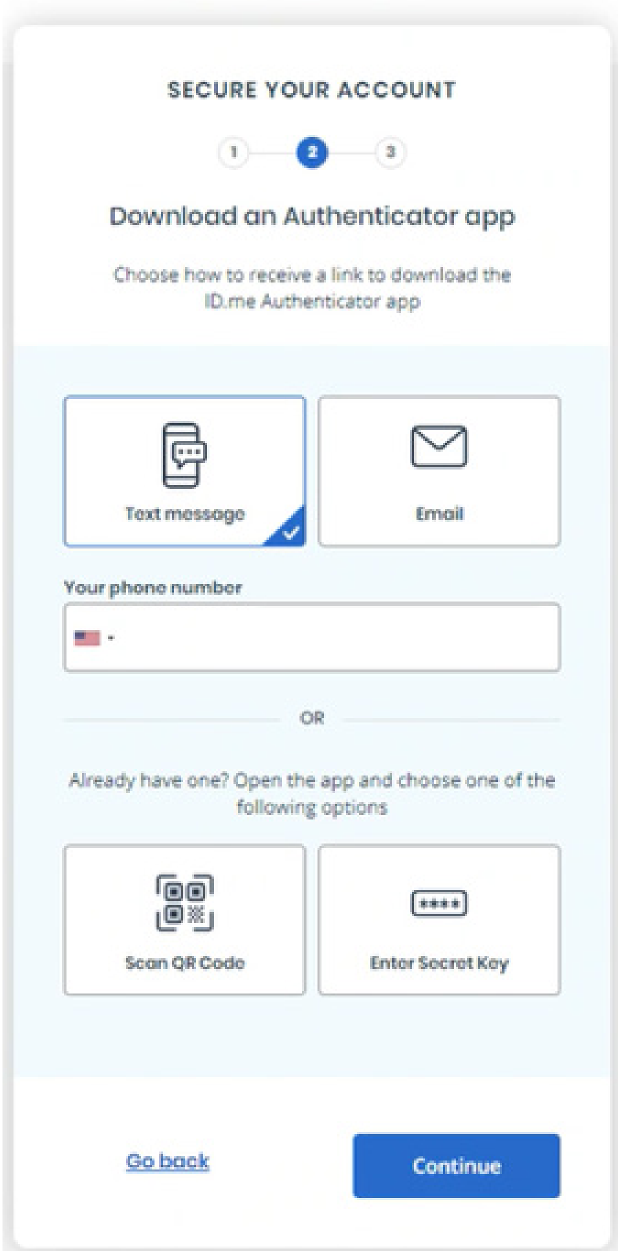
e. Tap **Confirm Code**.

In ePrescribe, the **Secure Your Account** page appears and displays the multi-factor authentication (MFA) options.



2. Set up multi-factor authentication:
   a. Tap the **Code Generator Application** box.

The enrollment options appear.

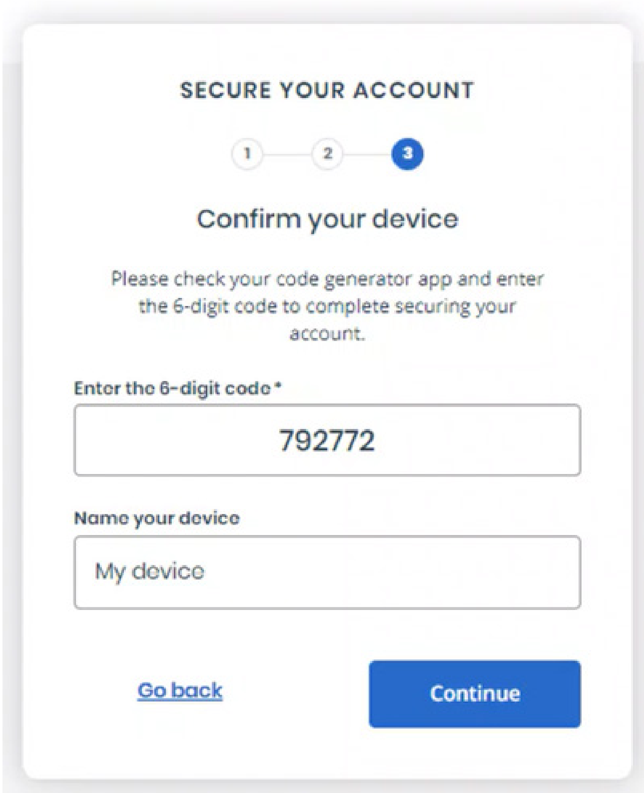


b. Enter your phone number or email address.

A link to download the ID.me authenticator app will be sent to the phone number or email address you provided.

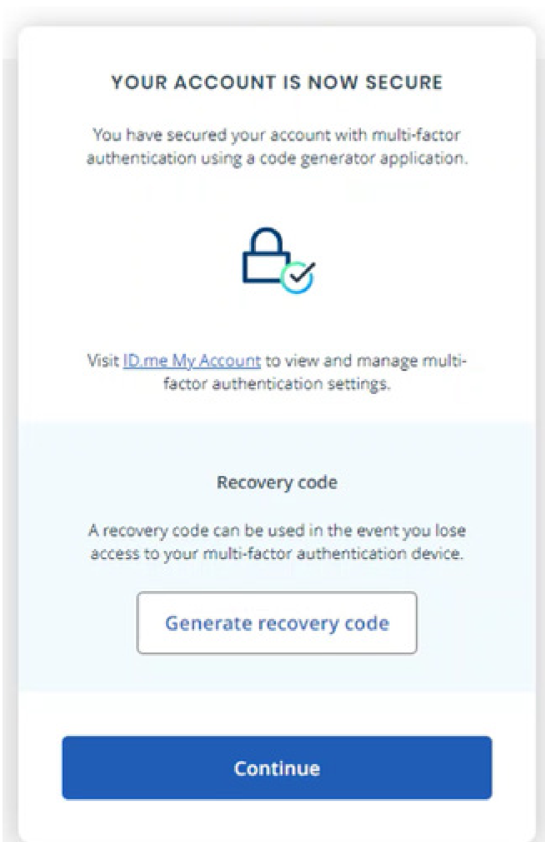
c. Under **Enter the 6-digit code**, enter the code to confirm the MFA device.

Tip: Under **Name your device**, it is also recommended to type a descriptive name for your MFA device.

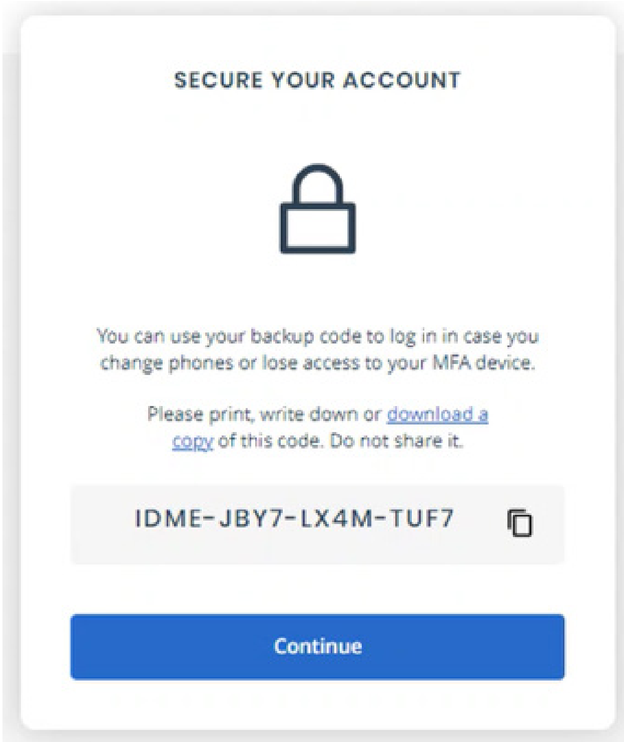


d. Tap **Continue**.

The **Your account is now secure** screen appears.



e. Tap **Generate recovery code** to have ID.me generate a one-time recovery code you can use if you ever need to recover access to your account in the event that you change or lose your smart device. A recovery code is required any time you change your multi-factor authentication.

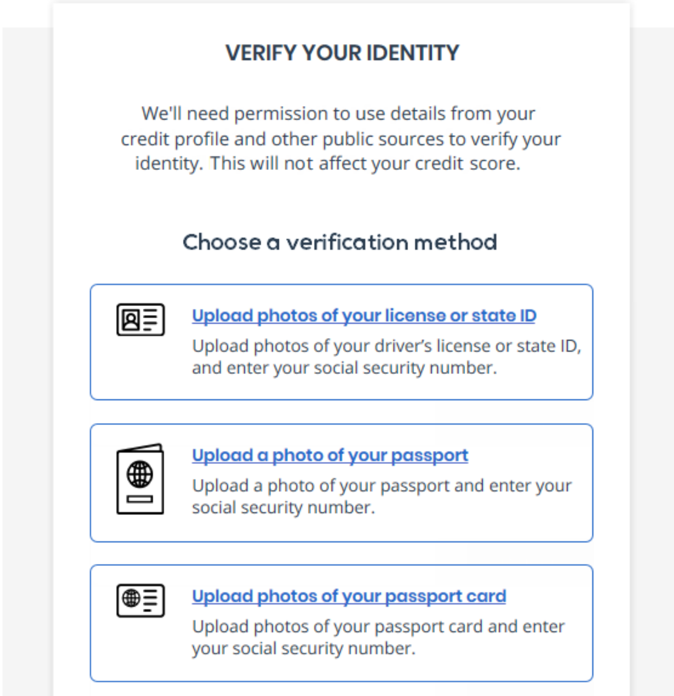


Note: If you previously had a different ID.me recovery code, it is not longer valid; use this new code instead. A new recovery code is generated automatically after the previous code is used.

Tip: Save or write down this recovery code (and date generated) in a a safe place where you can access it later, such as in a file on another device or in the cloud. recovery code each time.

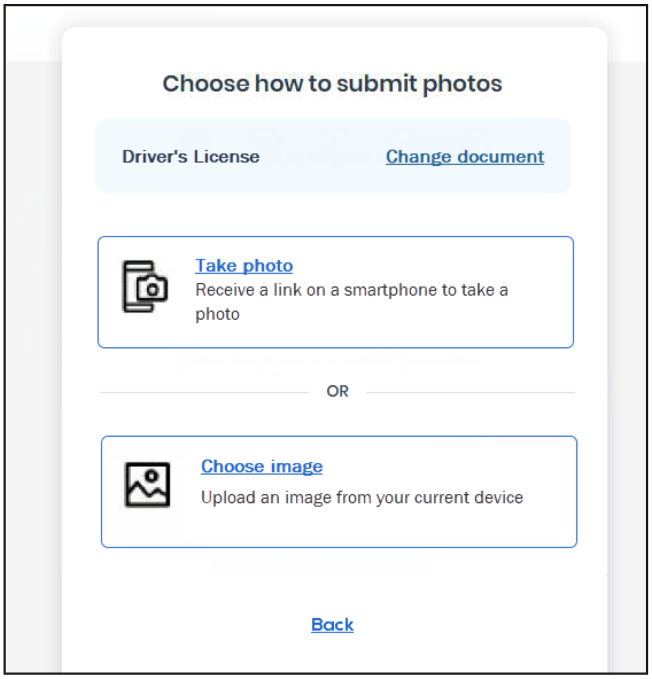
f. Tap **Continue**.

The **Verify Your Identity** page appears.

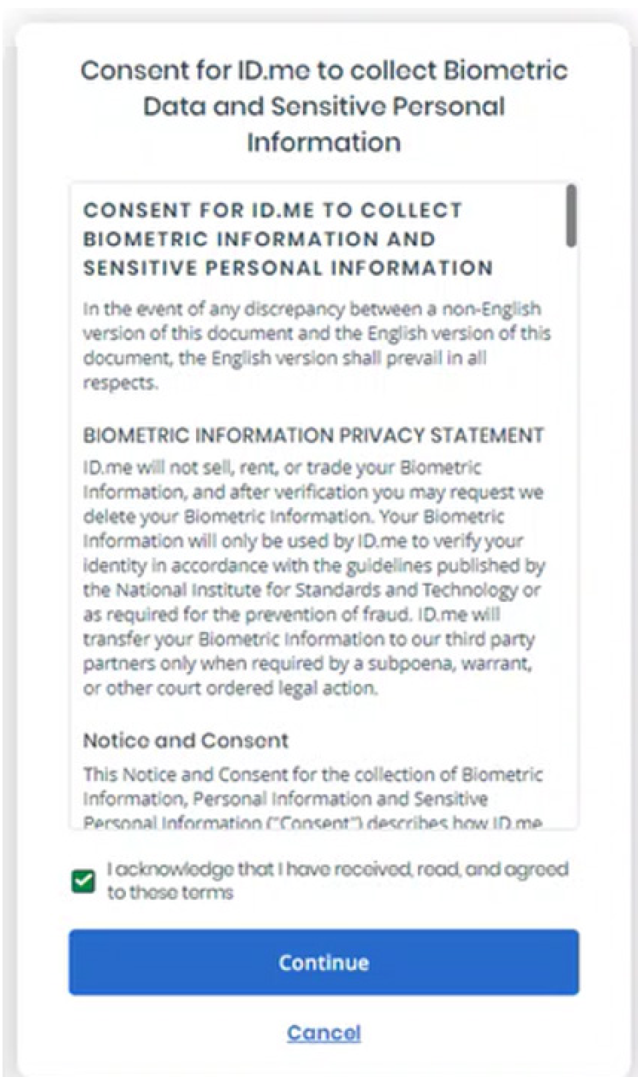


3. Complete the identity proofing steps:
   a. Under **Choose a verification method**, tap the box that corresponds to how you want to verify your identity. For the purposes of this guide, the uploading of license photos is explained, but the following methods are available:
      - **Upload photos of your license or state ID**
      - **Upload a photo of your passport**
      - **Upload photos of your passport Card**
   b. If the **Biometric Information Privacy Statement** page opens, read the policy, select the check box to acknowledge that you understand, and then tap **Continue**.

The **Choose how to submit photos** options appear.

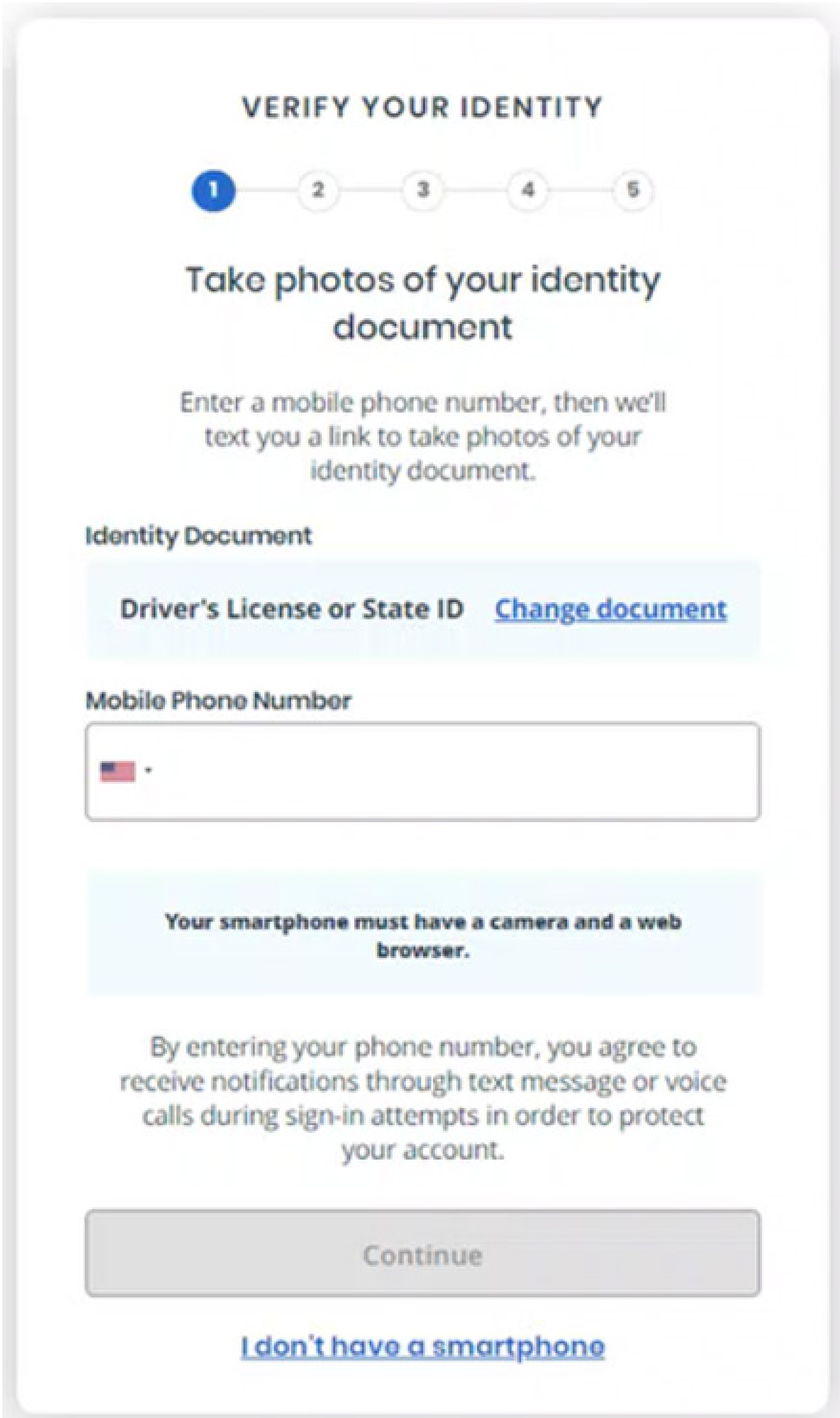


c. Tap **Take photo** to display the Consent screen.



d. At the **Consent** screen, tap **Continue**.

The **Take photos of your identity document** screen appears.

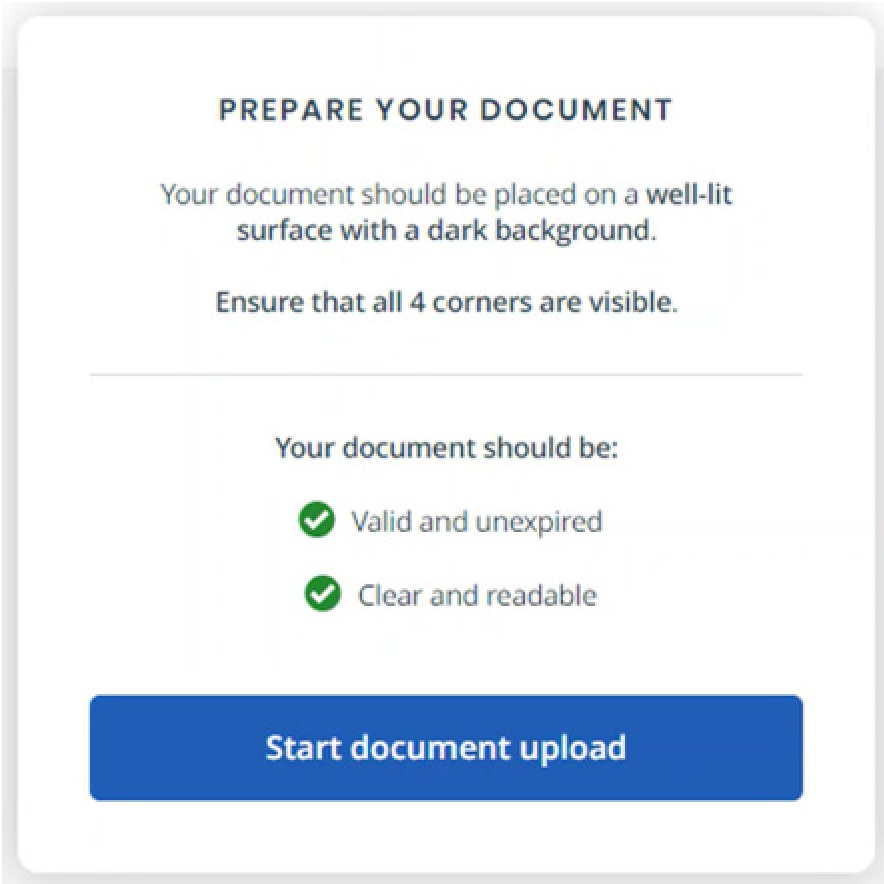


e. Enter your mobile phone number. The number must be registered to you under your full legal name, and the phone must be able to receive text messages.

f. Tap **Continue**.

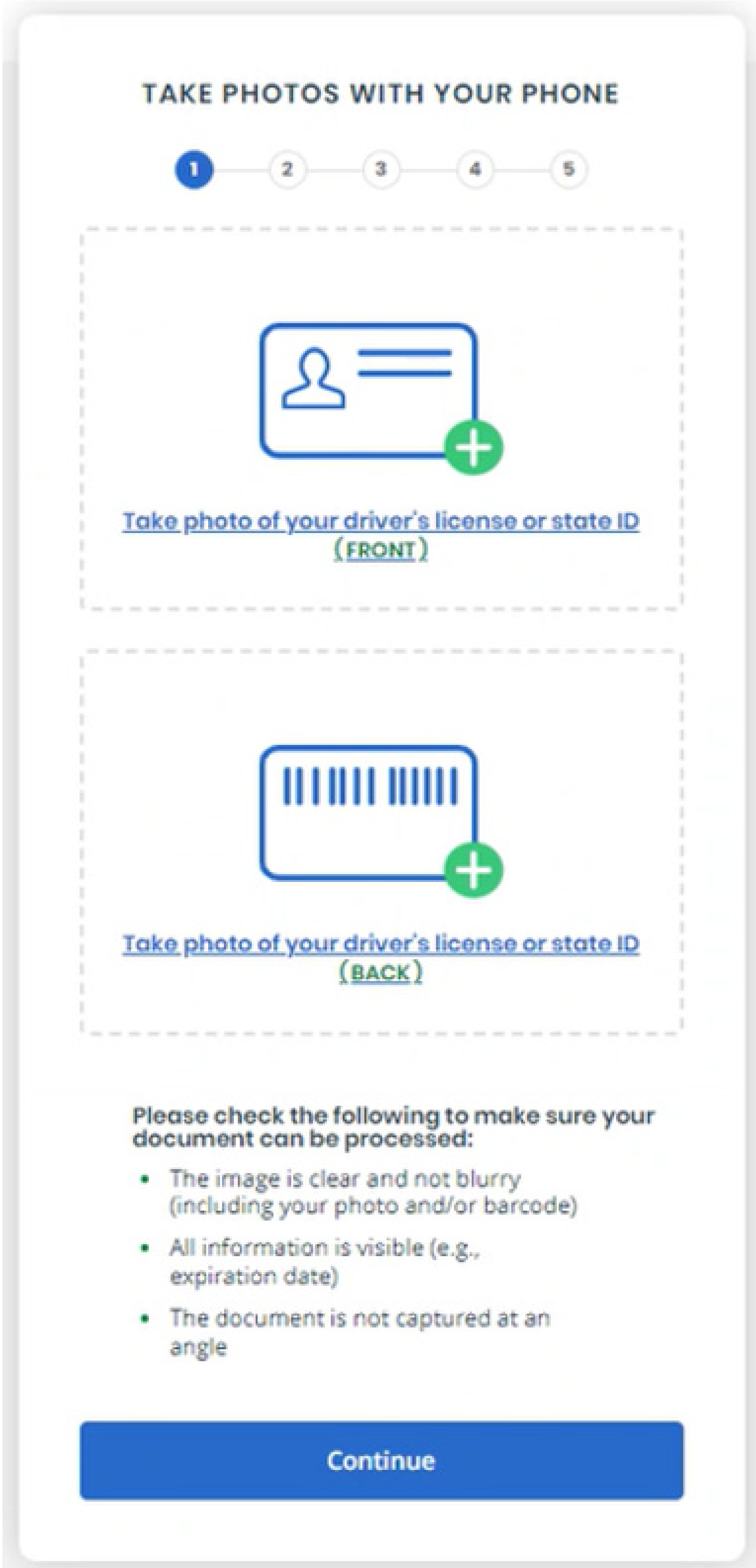
g. If a message appears asking if this is your email address, tap **Yes**.

ID.me displays the following screen where you can begin to take photos of your license.



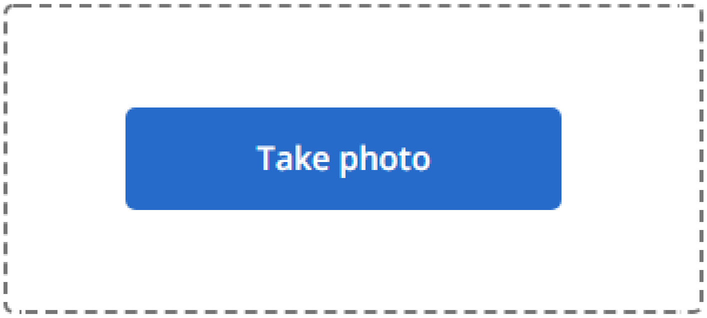
h. Tap **Start document upload**.

The browser opens and displays the **Take Photos With Your Phone** page.



i. In the upper box, tap **Take photo of your driver's license or state ID (FRONT)** to take a photo of the front of your license.

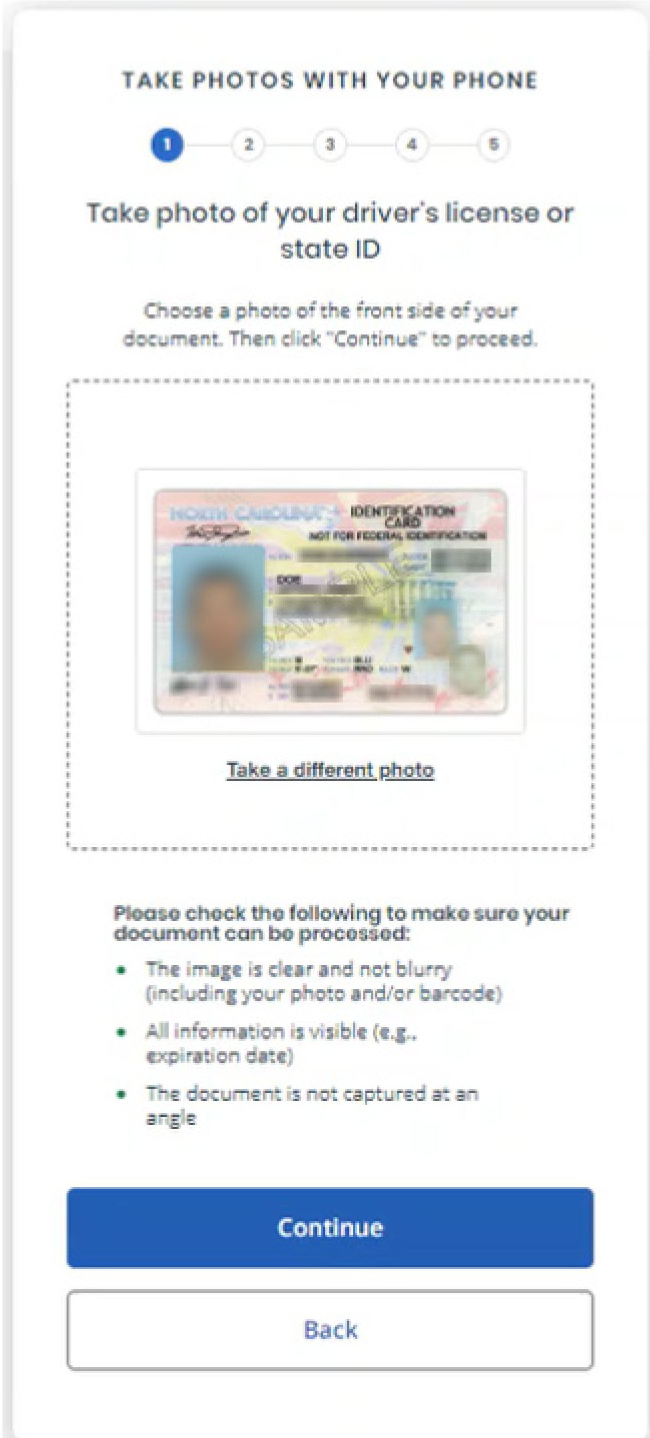
The option to take a photo appears.



j. Tap **Take Photo**.

k. Use your device's camera to take a picture of the front of your license.

The resulting photo appears.

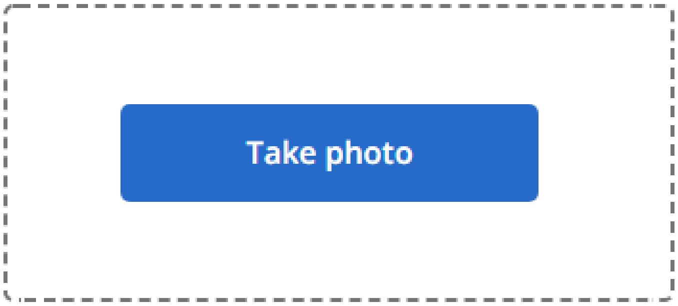


l. Tap **Continue**.

   The upper box now displays the photo of the front of the license.

m. In the lower box, tap the **Take photo of your driver's license or state ID (BACK)** link to take a photo of the back of your license.

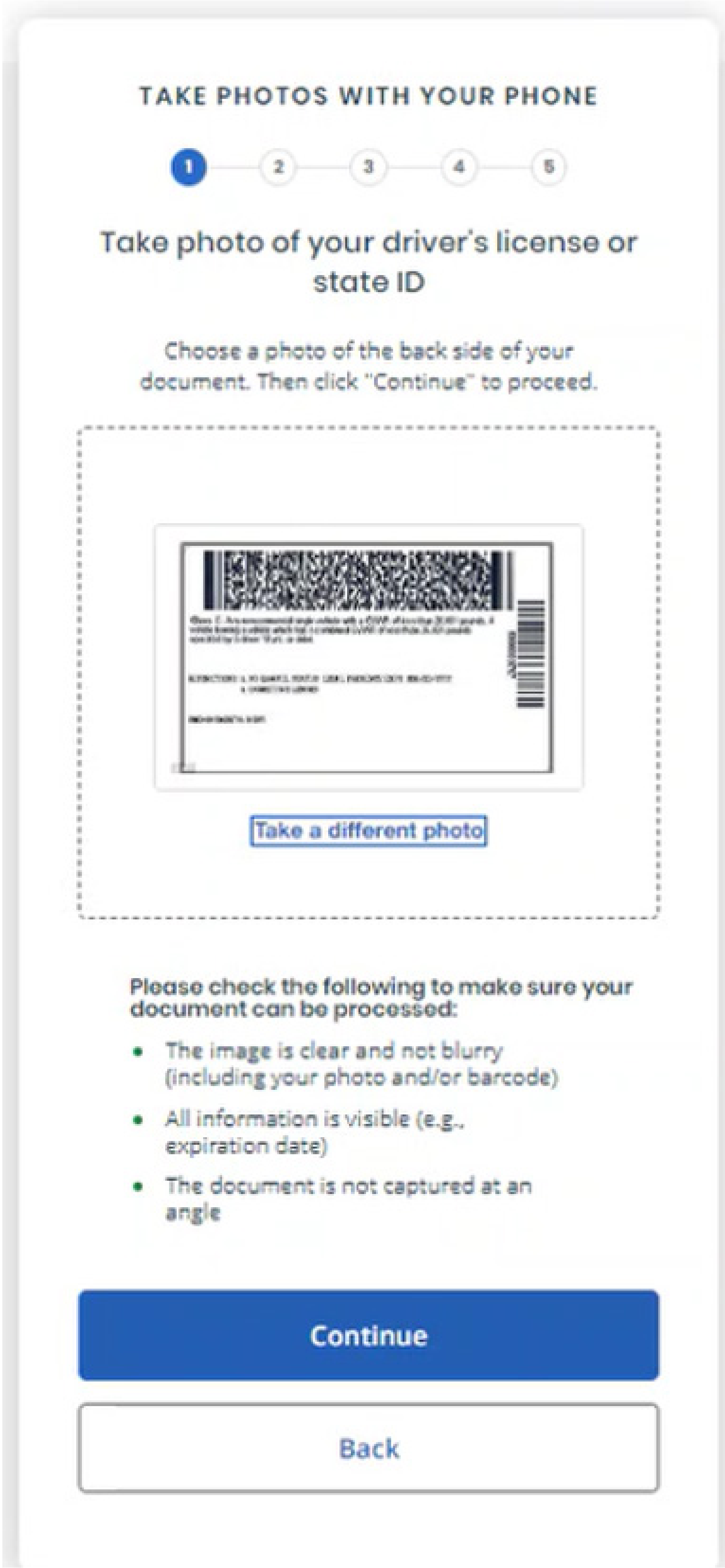
   The option to take a photo appears.



n. Tap **Take photo**.

o. Use your device's camera to take a picture of the back of your license.

The resulting photo appears.

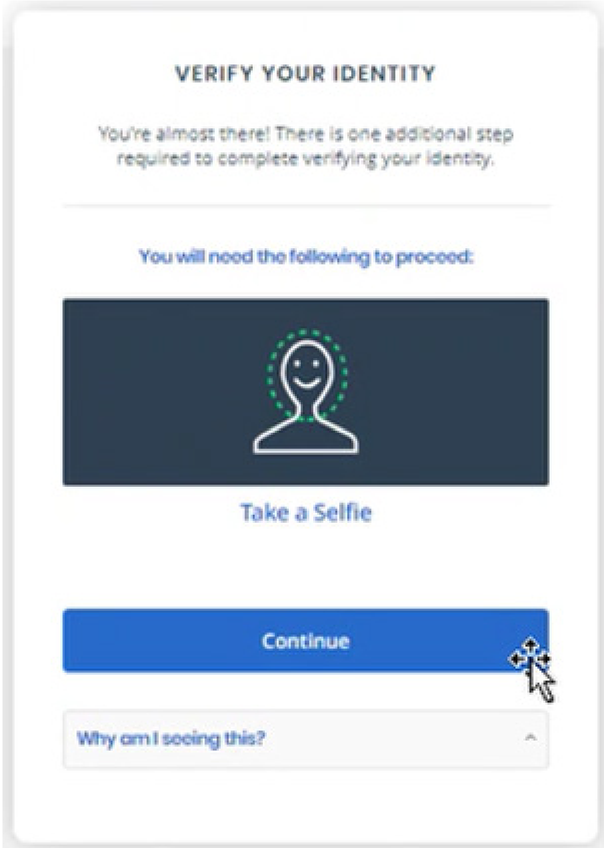


p. Tap **Continue**.

The lower box now displays the photo of the back of the license.

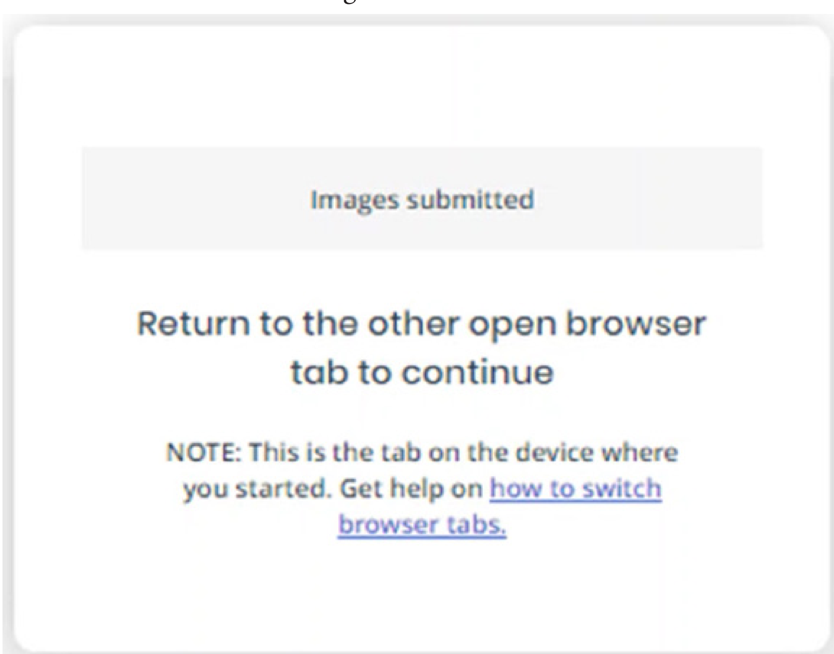
q. If the photos of your license are clearly displayed on your device, tap **Submit your photos** to upload the photos.

When the images have been submitted, you'll be prompted to submit a "Selfie" to verify your identity.

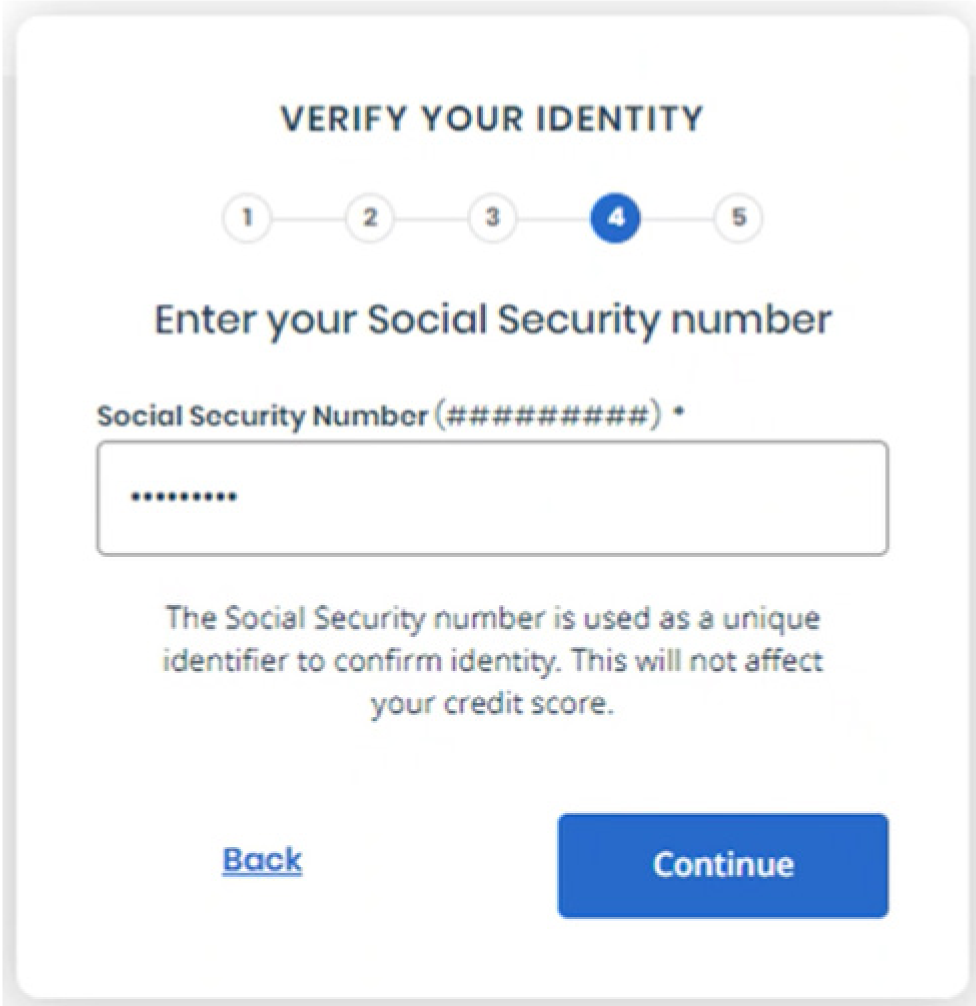


r. Tap **Take a Selfie**, take the selfie, and then tap **Continue**.

When you see the **Images submitted** screen below, you may need to switch back to an earlier browser tab or device before continuing.

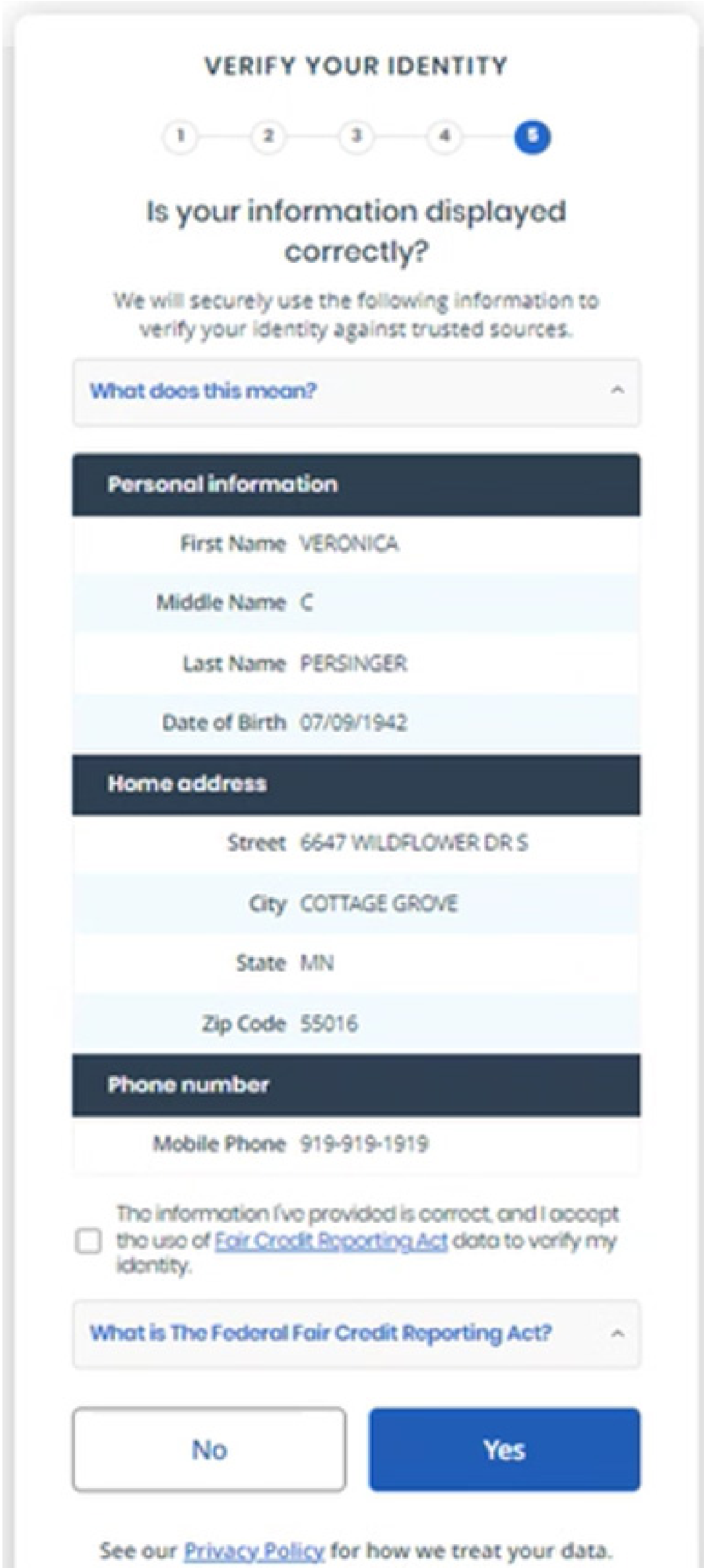


The **Enter Your Social Security Number** page appears.



s. Enter your Social Security Number, and then tap **Continue**.

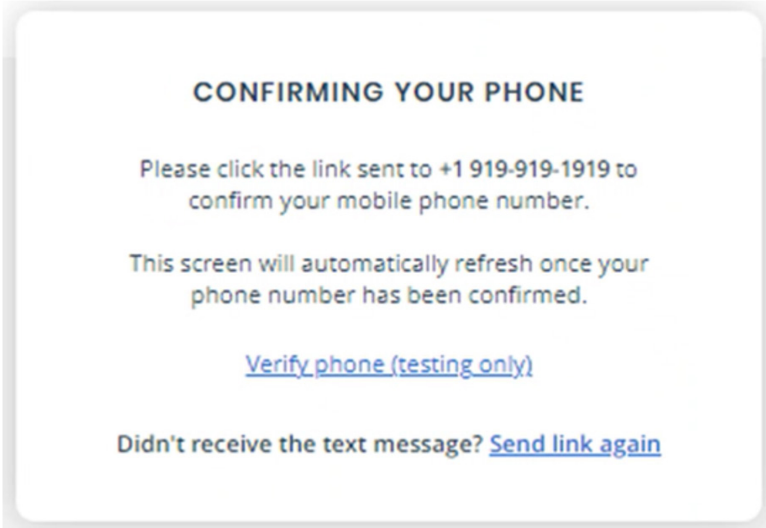
Your identity information appears for you to verify.



t. Confirm that your information is correct, and then select the **The information I've provided is correct, and I accept the use of Fair Credit Reporting Act data to verify my identity** check box.

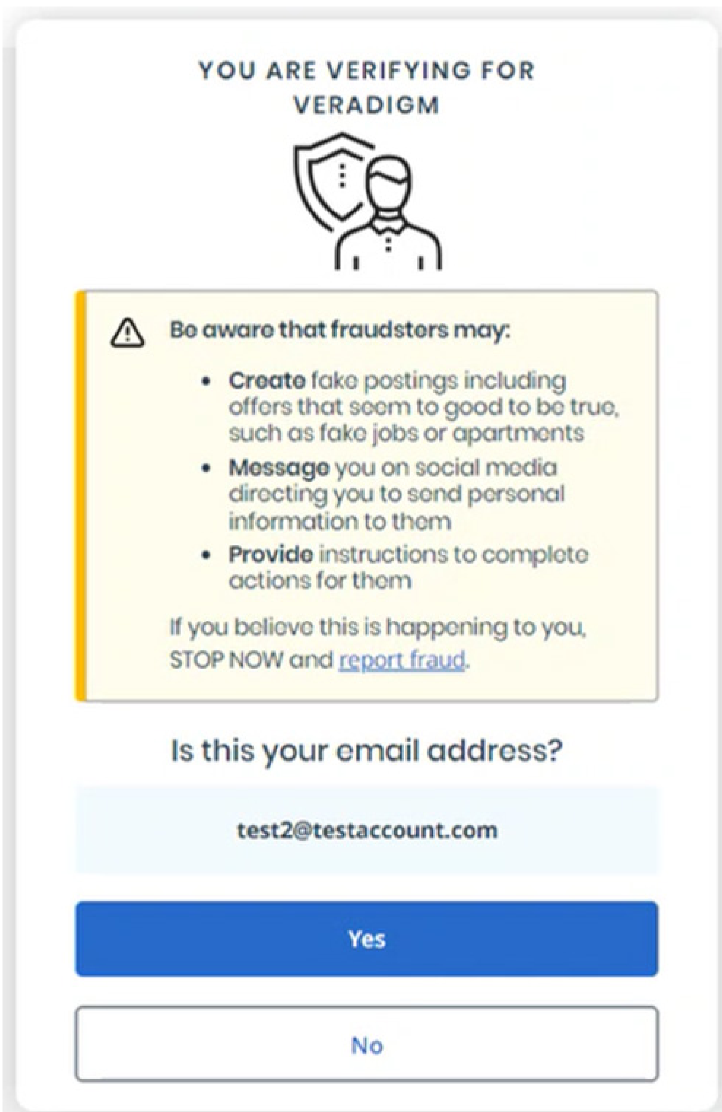
u. Click **Yes**.

The **Confirming Your Phone screen** appears.



v. Click **Verify phone,** and ID.me will send a test message to confirm your phone number.

The **You Are Verifying for Veradigm screen** appears.

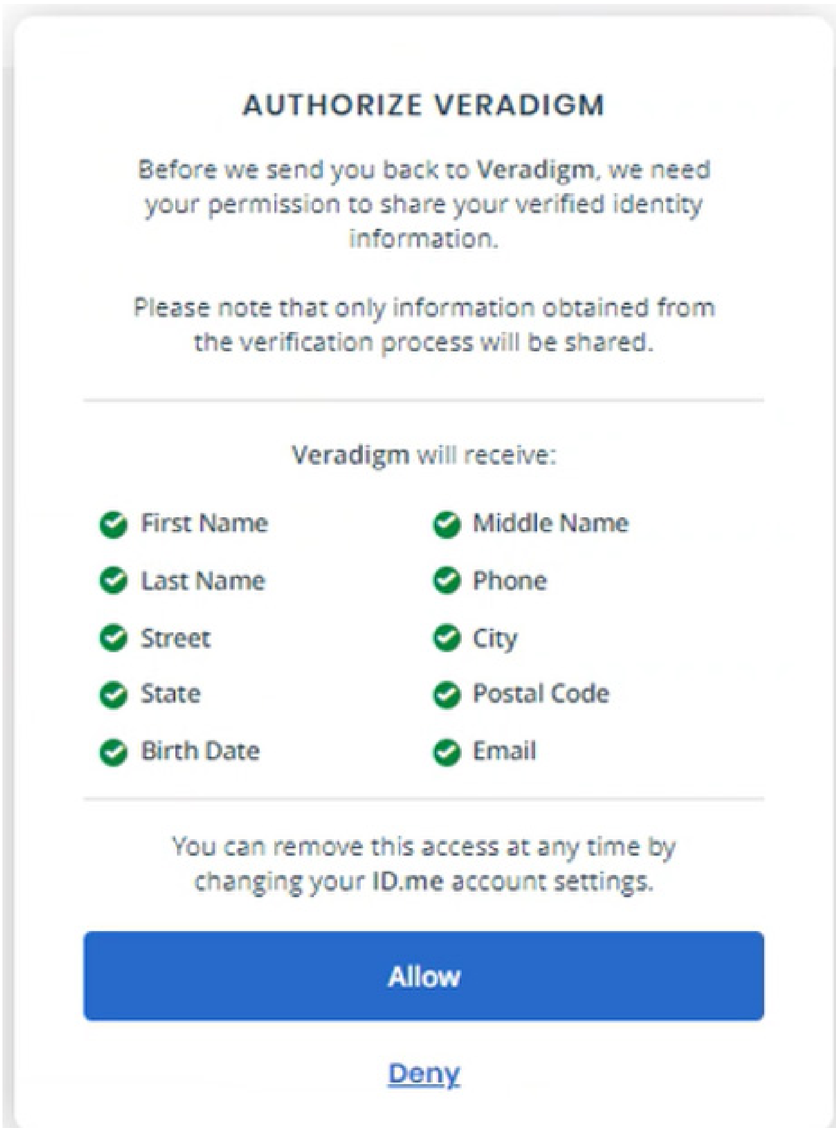


w. Verify that this is the email address you registered with ID.me, and then click **Yes**.

Notes:

- This step is necessary as a fraud prevention measure.
- If prompted to "Return to the other open browser tab to continue," you may need to return to the original browser tab or device where you started Veradigm registration.

The **Authorize Veradigm** screen appears.

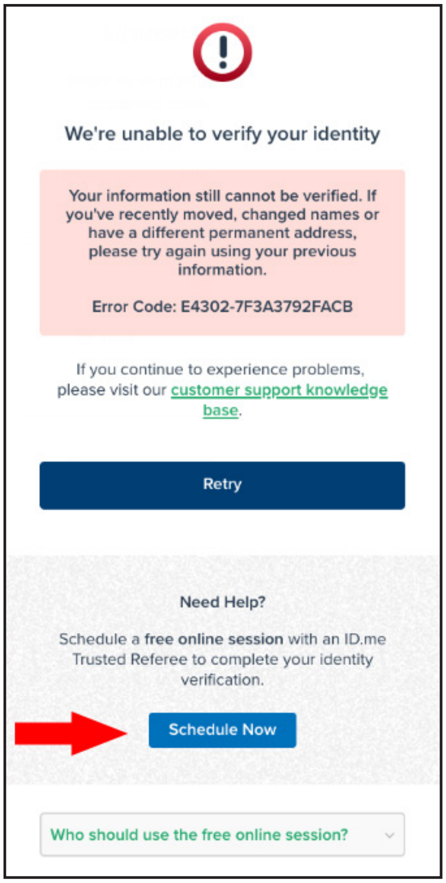


x. Click **Allow**.

Important: If you click **Deny**, you'll need to repeat most of the account creation and ID verification process in this guide to set up ePrescribe.

Your ID.me account is now linked to your Veradigm (formerly Allscripts) security account, and you are logged out automatically.

Important: If ID.me was not able to complete the identity proofing process, you will need to follow an alternate verification process, which involves completing a video conference with an ID.me representative (Trusted Referee) to confirm your identity.



Alternate verification process

If you receive a message stating that your identity could not be verified, do the following:

i.) On your smart device, click **Schedule Now**.

ii.) Click **Get Started**.

iii.) Select a preferred date and time, and then click **Continue**.

iv.) Confirm your personal information, and then click **Continue**.

v.) Select a primary and secondary identification document. Refer to https://help.id.me/hc/en-us/articles/360012933634-What-is-a-Primary-or-Secondary-Identification-Document- for information about acceptable primary and secondary documents.

vi.) Click **Continue**.

vii.) From your smart device, take and upload photos of your identification documents, and then tap **Continue**.

viii.) When your photos are received, in the ePrescribe window, enter your mobile phone number, and then click **Continue**.

ix.) On you smart device, click the link in the text message that you receive from ID.me, and then take a photo of yourself using the device's camera.

x.) Under **Selfie**, tap **Choose**.

xi.) Tap **Choose file**, and then select the photo that you took of yourself.

xii.) Tap **Submit Selfie**.

In the ePrescribe window, a confirmation that your video call appointment with an ID.me referee has been scheduled appears.

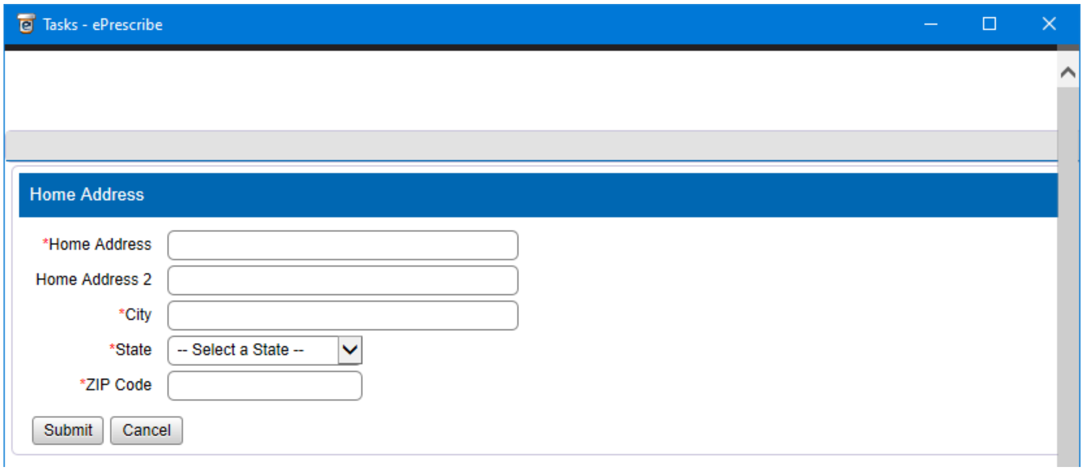
Finishing ePrescribe Setup

After your ID.me account is successfully created and linked to your Veradigm (formerly Allscripts) security account, you'll need to finish the ePrescribe setup.

1. Close and reopen ePrescribe using the web address eprescribe.allscripts.com.

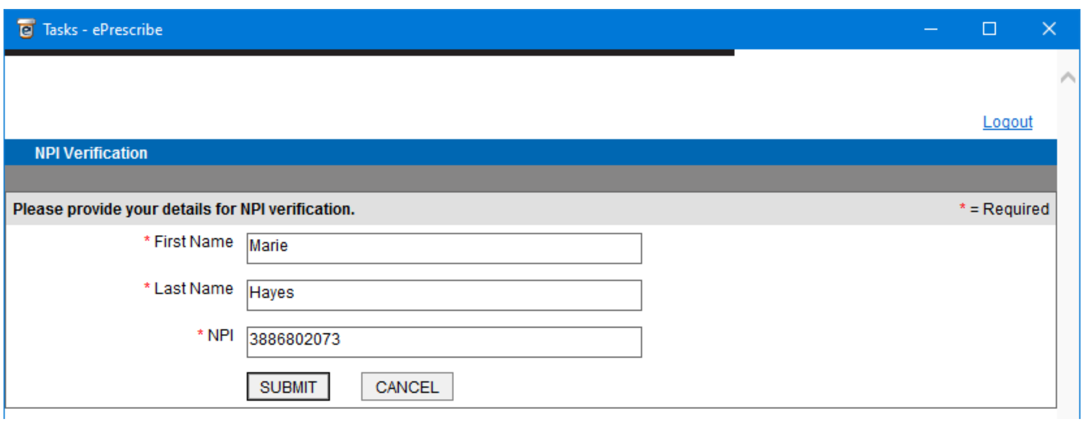
   Note: You will use the web address eprescribe.allscripts.com going forward to create prescriptions.

   The **Home Address** page appears.



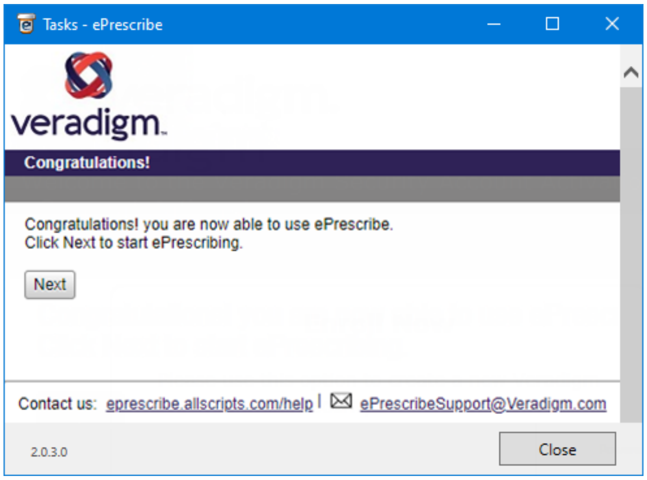
2. Enter your home street address, and then click **Submit**.

   The **NPI Verification** page appears.



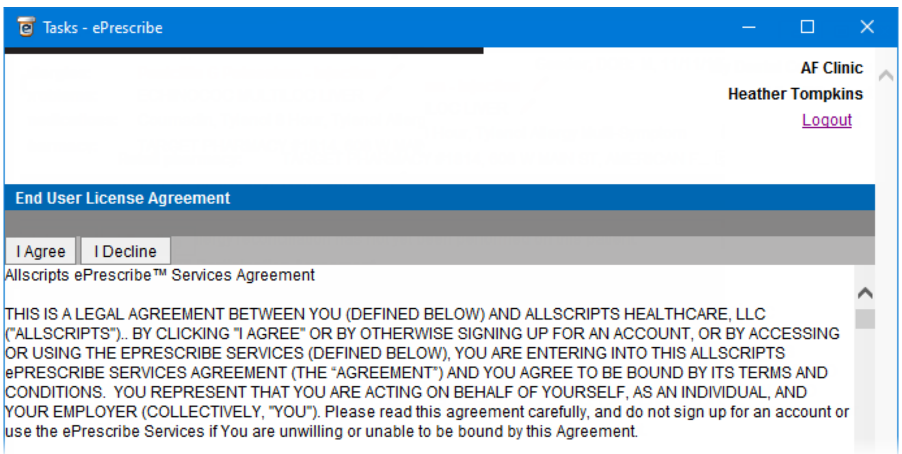
3. Verify that your name and NPI are correct, and then click **Submit**.

   The **Congratulations!** page appears.



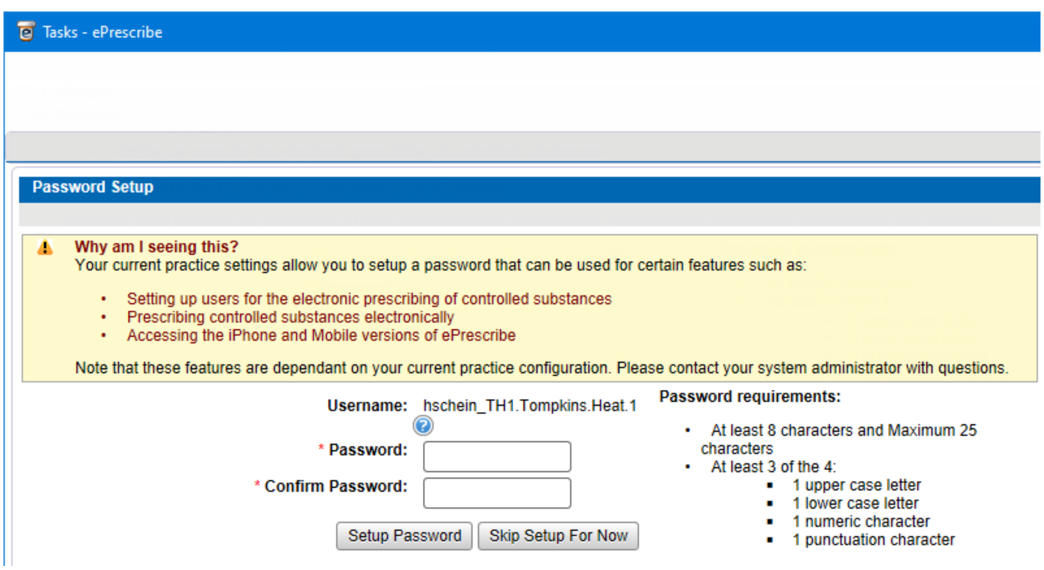
4. Click **Next**.

   The **End User License Agreement** page appears.



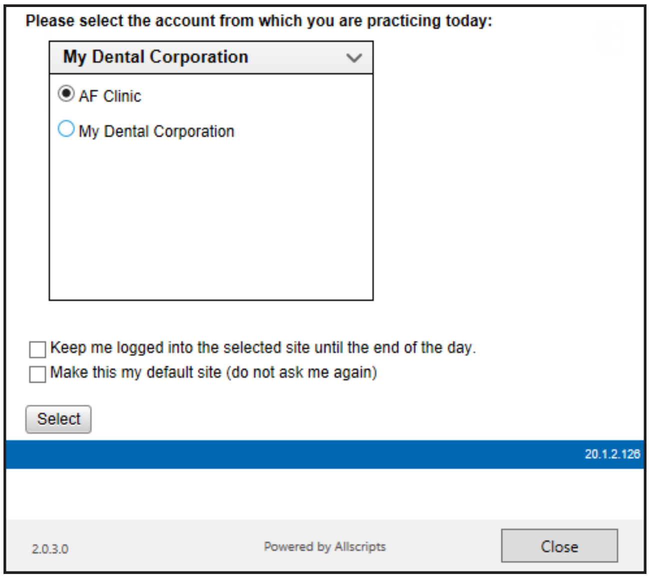
5. Review the agreement, and then click **I Agree**.

   If the **Password Setup** page appears, proceed to the next step; otherwise, skip to step 16.



6. If you need to set up users to prescribe controlled substances electronically, or if you need to prescribe controlled substances electronically, enter a password in the **Password** and **Confirm Password** boxes, and then click **Setup Password**.

If you have multiple sites set up in ePrescribe (as explained in “Adding Sites in ePrescribe” on page <?>), the site selection page appears.



7. Select a site.
8. Select any of the following check boxes as needed:
   - **Keep me logged into the selected site until the end of the day** – When you click **Select**, for the rest of the day, ePrescribe will not prompt you to select a site.
   - **Make this my default site (do not ask me again)** – When you click **Select**, ePrescribe will always log you in to the selected site and will never again prompt you to select a site.

   Note: With neither check box selected, ePrescribe will prompt you to select a site each time you open that module from EndoVision.
9. Click **Select**.

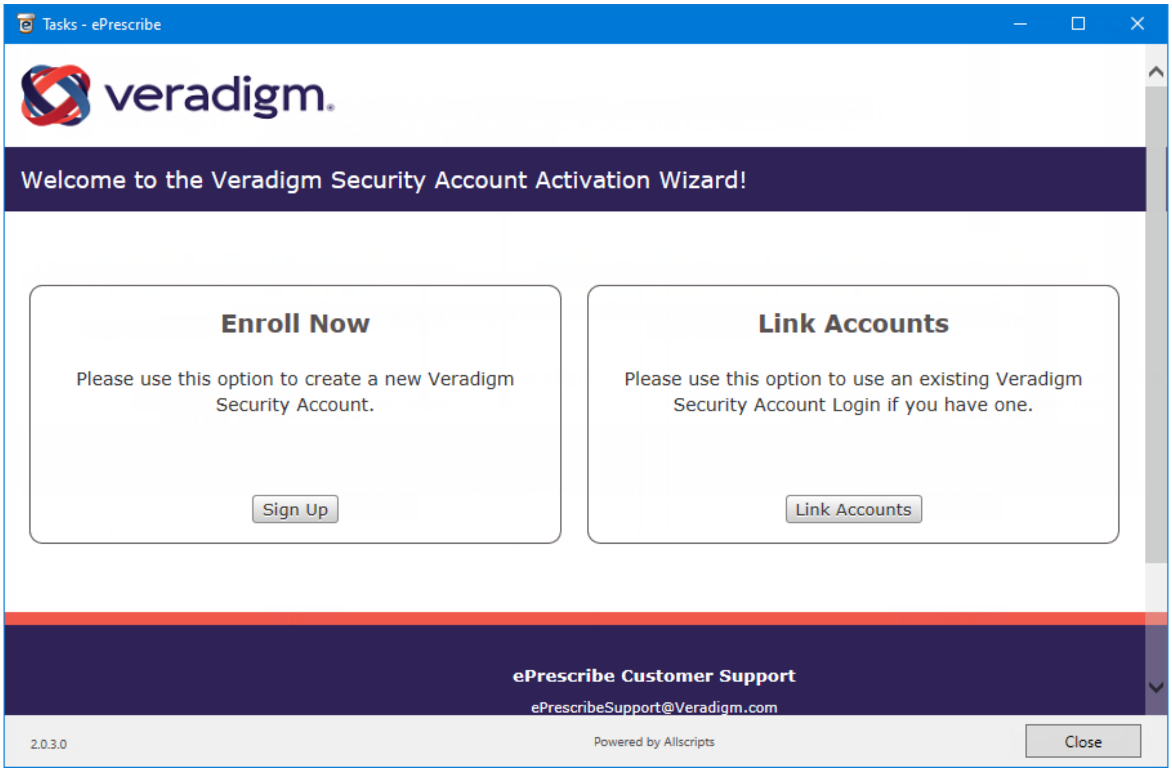
Linking an ePrescribe Account

After you enable a provider’s user account to use ePrescribe, if the provider has been signed up with ePrescribe previously and already has an active Electronic Prescribing of Controlled Substances (EPCS) account through ID.me, that provider must link his or her EPCS account to ePrescribe. The provider will need his or her Veradigm (formerly Allscripts) security account credentials, which are the login ID and password associated with the provider’s ePrescribe user account.

To link an ePrescribe account

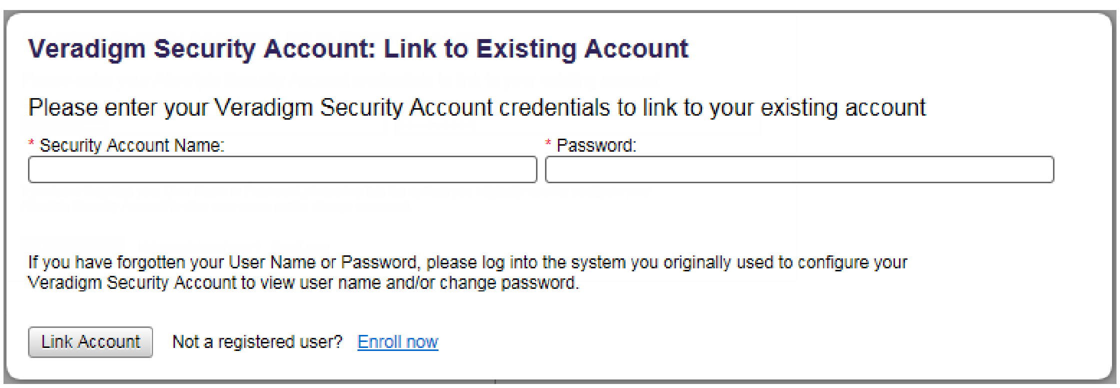
1. Log in to the ePrescribe website at hseprescribe.com/access with a user account that has been enabled to use ePrescribe.

   If you have not used ePrescribe yet, the **Welcome to the Veradigm Security Account Activation Wizard!** page appears.



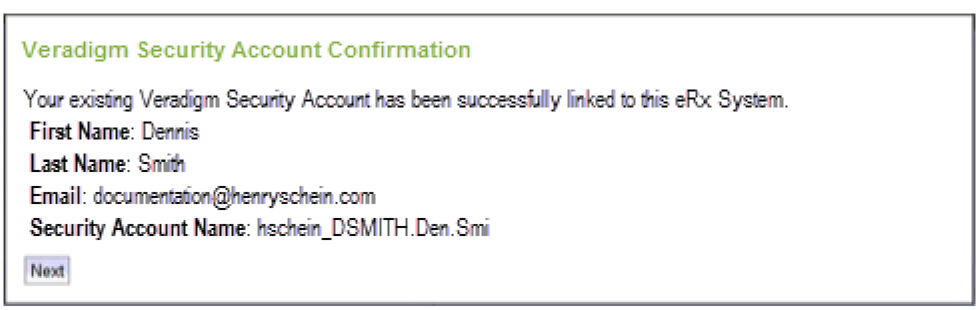
2. Click **Link Accounts**.

   The **Veradigm Security Account: Link to Existing Account** page appears.



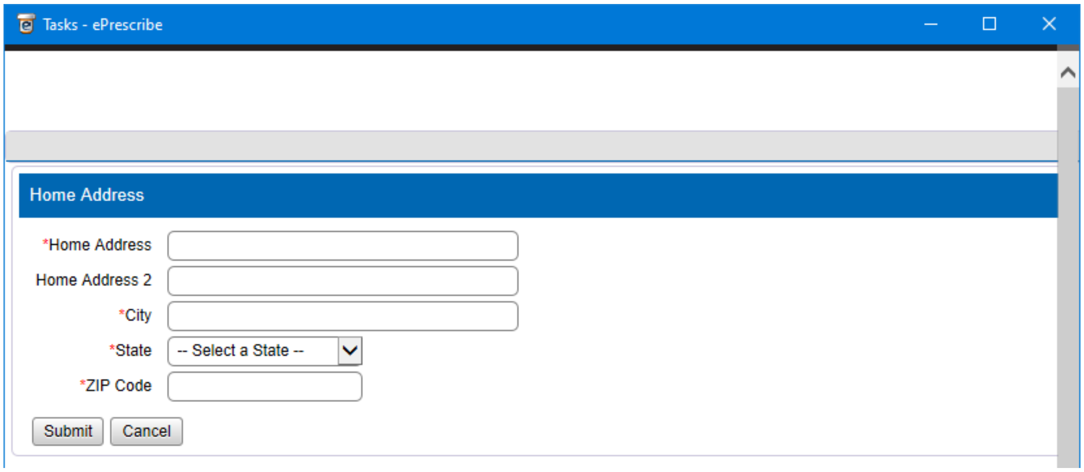
3. Enter the correct credentials in the **Security Account Name** and **Password** boxes.
4. Click **Link Account**.

   A confirmation message that contains some basic account information appears.



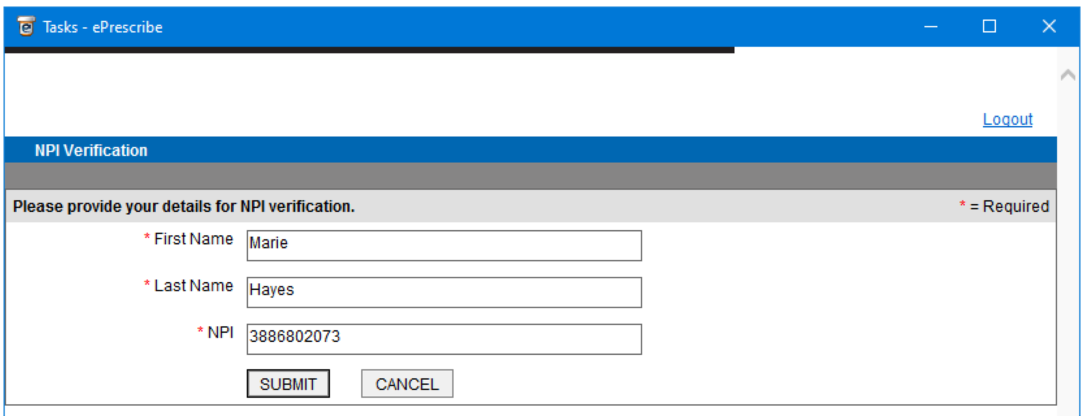
5. Click **Next**.

   The **Home Address** page appears.



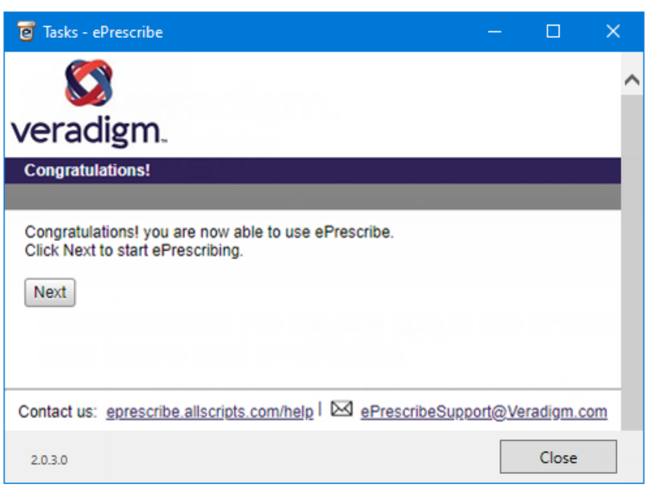
6. Enter your home street address, and then click **Submit**.

   The **NPI Verification** page appears.



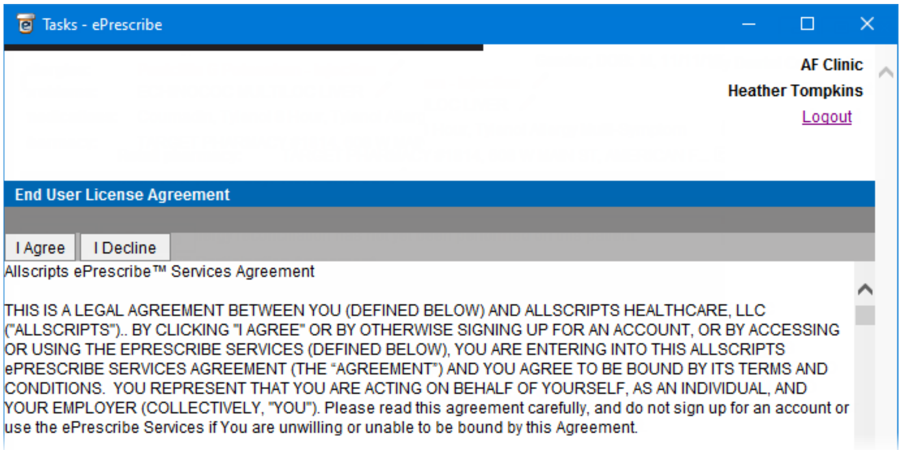
7. Verify that your name and NPI are correct, and then click **Submit**.

   The **Congratulations!** page appears.



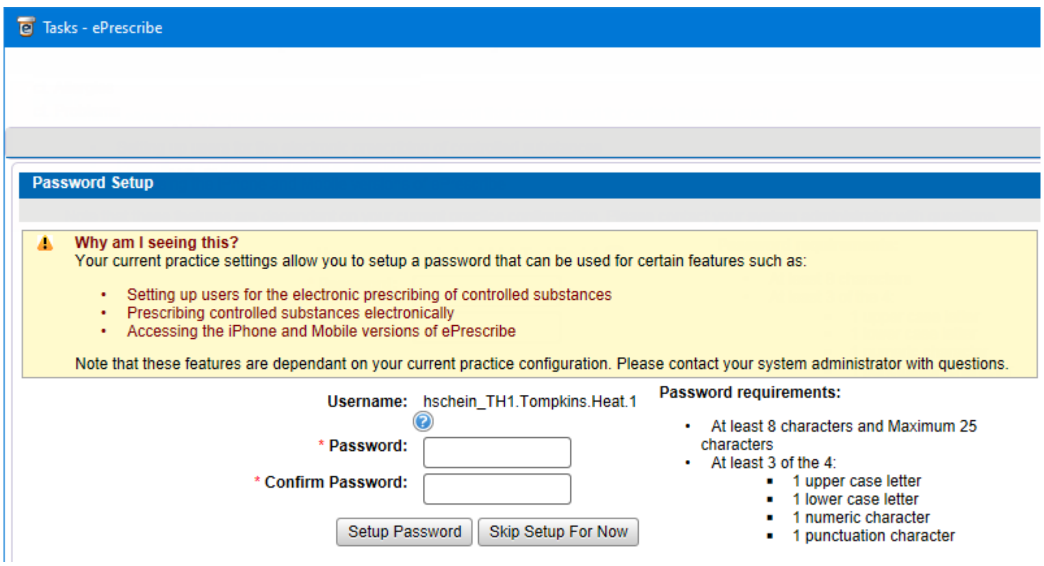
8. Click **Next**.

   The **End User License Agreement** page appears.



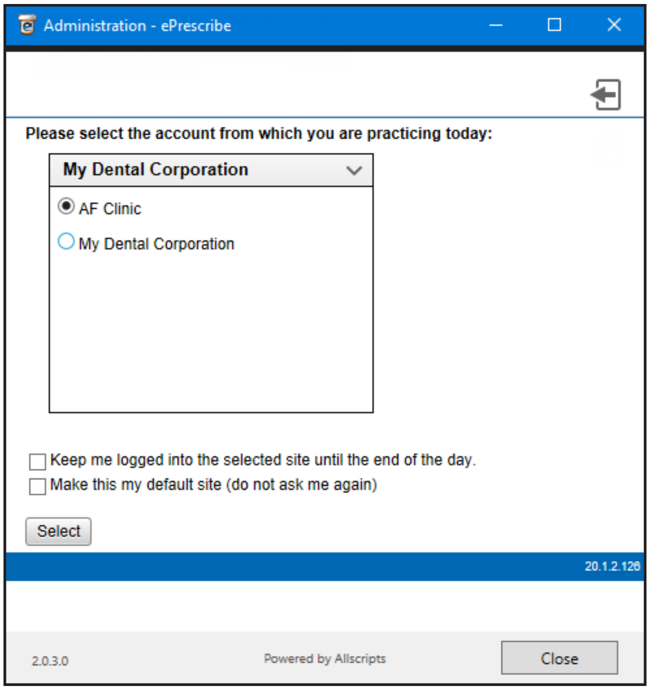
9. Review the agreement, and then click **I Agree**.

   If the **Password Setup** page appears, proceed to the next step; otherwise, skip to step 17.



10. If you need to set up users to prescribe controlled substances electronically, or if you need to prescribe controlled substances electronically, enter a password in the **Password** and **Confirm Password** boxes, and then click **Setup Password**.

    If you have multiple sites set up in ePrescribe (as explained in “Adding Sites in ePrescribe” on page <?>), the site selection page appears.



11. Select a site.
12. Select any of the following check boxes as needed:
    - **Keep me logged into the selected site until the end of the day** – When you click **Select**, for the rest of the day, ePrescribe will not prompt you to select a site.
    - **Make this my default site (do not ask me again)** – When you click **Select**, ePrescribe will always log you in to the selected site and will never again prompt you to select a site.

    Note: With neither check box selected, ePrescribe will prompt you to select a site each time you open that module from EndoVision.

13. Click **Select**.

Registering for EPCS

Each doctor who prescribes controlled substances electronically must complete a one-time registration for Electronic Prescribing of Controlled Substances (EPCS). ID.me is the Credential Service Provider (CSP) that providers will use to register for EPCS.

The following sections explain the registration process according to the number of providers who will prescribe controlled substances:

- One Provider
- Multiple Providers

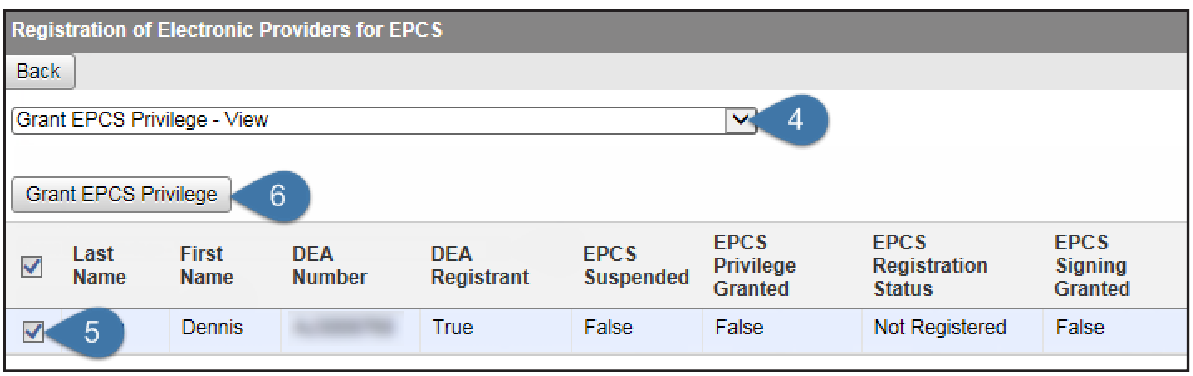
One Provider

If you have only one provider who uses ePrescribe to prescribe controlled substances, the Provider can complete the registration process (setup, identity verification, and approval).

Step 1 — To turn on EPCS

Prior to beginning the registration process, do the following:

1. Log in to EndoVision. Then, in the Office Manager, click the **ePrescribe Task Mode** toolbar button to open ePrescribe in “task mode.”
2. Click the **Settings** tab.
3. Click the **Manage EPCS** link.

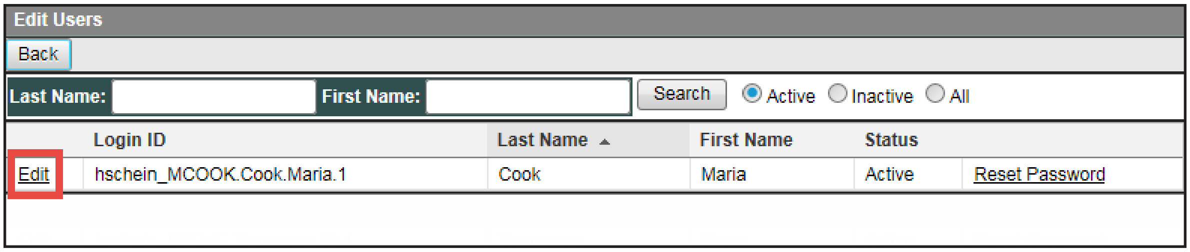


4. From the list at the top, select **Grant EPCS Privilege - View**.
5. Select the check box next to your name.
6. Click **Grant EPCS Privilege**.
7. Close ePrescribe to log out.

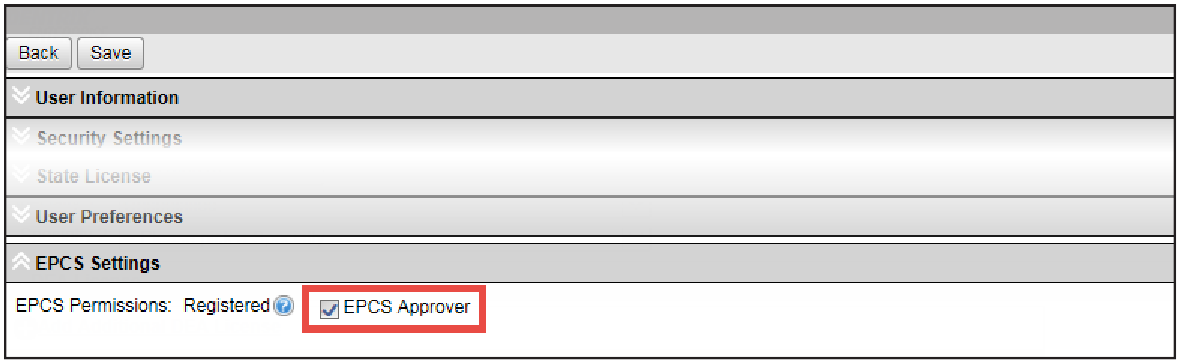
Step 2 — To set up approval

To set up the permissions for approval, do the following:

1. In the Office Manager, click the **ePrescribe Task Mode** toolbar button to open ePrescribe in “task mode.”
2. Click the **Settings** tab.
3. Click the **Edit Users** link.



4. Click the **Edit** link to the left of your name.



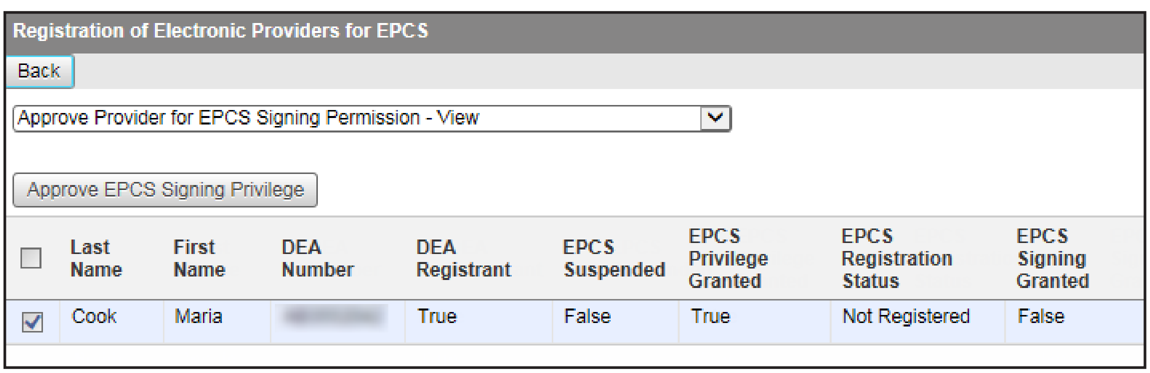
5. Scroll to the bottom. Under **EPCS Settings**, select the **EPCS Approver** check box.
6. Scroll back to the top, and click **Save**.
7. Close ePrescribe to log out.

Step 3 — To approve

After setting up the approval permission, do the following:

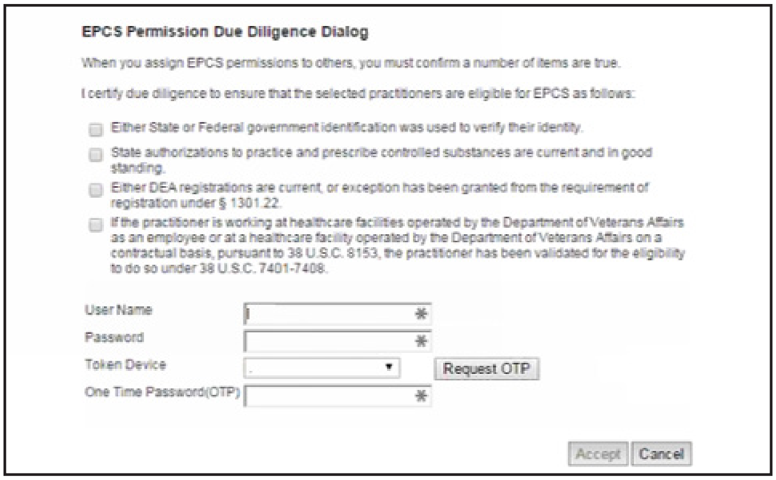
1. Open ePrescribe as explained in "Opening ePrescribe" in the Usage chapter.
2. On the right, under **Urgent Message**, click the **Manage EPCS Approvals** link.

   If you have successfully completed registration, your name appears.



3. Select the check box next to your name.
4. Click **Approve EPCS Signing Privilege**.

   The due diligence dialog box appears.



5. Review the information, and select all four check boxes.
6. Enter your Veradigm (formerly Allscripts) security account credentials in the **User Name** and **Password** boxes.
7. Select **Authenticator** from the **Token Device** list.
8. In the **One Time Password (OTP)** box, enter the OTP that you generate with the ID.me Authenticator app on your smart device.
9. Click **Accept**.
10. Close ePrescribe to log out.

Tip: To verify that EPCS registration has been completed, so you can begin prescribing controlled substances, do the following:

1. Open ePrescribe as explained in “Opening ePrescribe” in the Usage chapter.
2. To open your ePrescribe user profile, click the pencil icon next to the user name in the upper-right corner.
3. Scroll to the bottom, and verify that **EPCS Permission** has “ON” next to it. If it does, you have the necessary permission to prescribe, sign, and send electronic prescriptions for controlled substances.

Multiple Providers

If you have multiple providers who use ePrescribe to prescribe controlled substances, the following three individuals are required to complete the EPCS registration (two of the three must be DEA registrants):

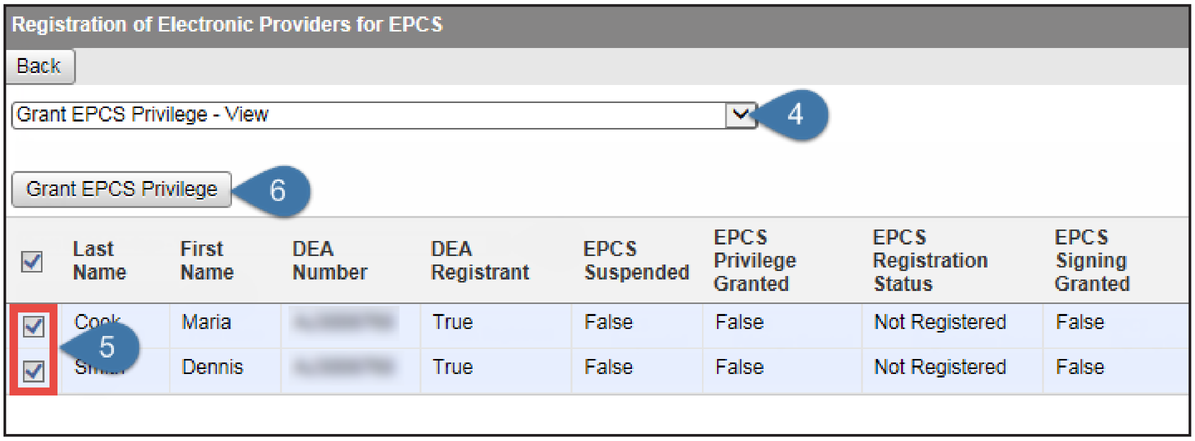
- **Admin** – Turns EPCS on for the Providers. Cannot be a DEA registrant.
- **Provider** – Goes through the identity proofing. Is a DEA registrant.
- **Approver** – Approves a Provider other than him or herself. Is a DEA registrant. (Providers approve each other.)

Step 1 — To turn on EPCS (Admin)

Prior to a Provider beginning the registration process, the Admin must do the following:

1. Log in to EndoVision as the Admin. Then, in the Office Manager, click the **ePrescribe Task Mode** toolbar button to open ePrescribe in “task mode.”
2. Click the **Settings** tab.

3. Click the **Manage EPCS** link.

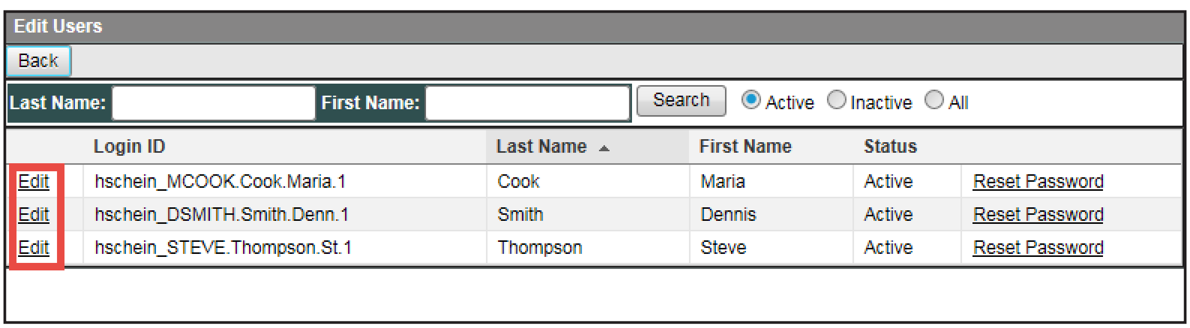


4. From the list at the top, select **Grant EPCS Privilege - View**.
5. Select the check boxes next to the Providers to whom you are granting EPCS privileges.
6. Click **Grant EPCS Privilege**.
7. Close ePrescribe to log out. The Providers (from step 5) must also log out of ePrescribe.

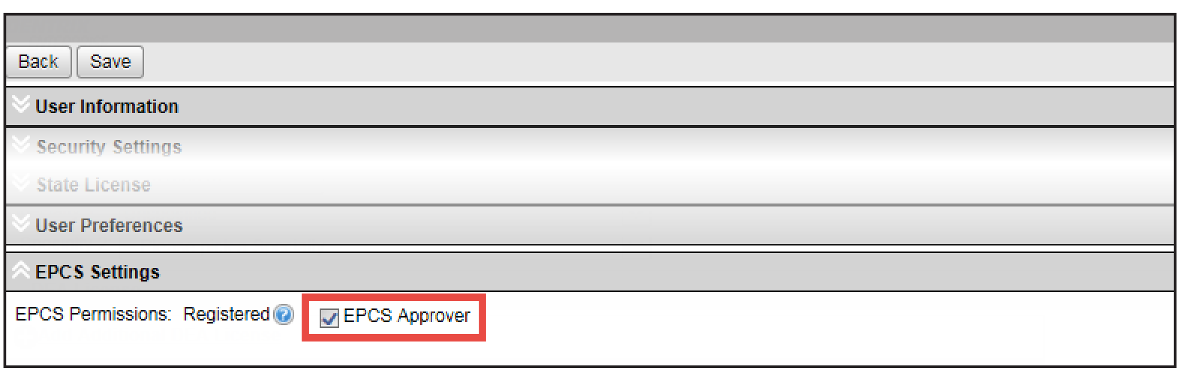
Step 2 (Admin) — To set up the Approver

The Admin must set up the permissions for the Approver. Do the following:

1. Log in to EndoVision as the Admin. Then, in the Office Manager, click the **ePrescribe Task Mode** toolbar button to open ePrescribe in "task mode."
2. Click the **Settings** tab.
3. Click the **Edit Users** link.



4. Click the **Edit** link to the left of the Provider who will be the Approver.



5. Scroll to the bottom. Under **EPCS Settings**, select the **EPCS Approver** check box.

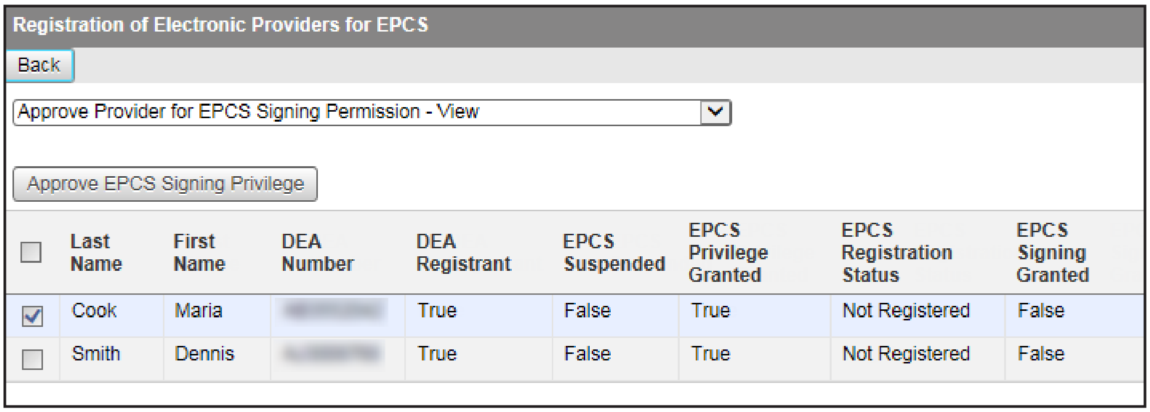
6. Scroll back to the top, and click **Save**.
7. Close ePrescribe to log out.

Step 3 (Approver) — To approve Providers

After the Admin sets up an Approver's permissions, the Approver (who must be a DEA registrant) must do the following:

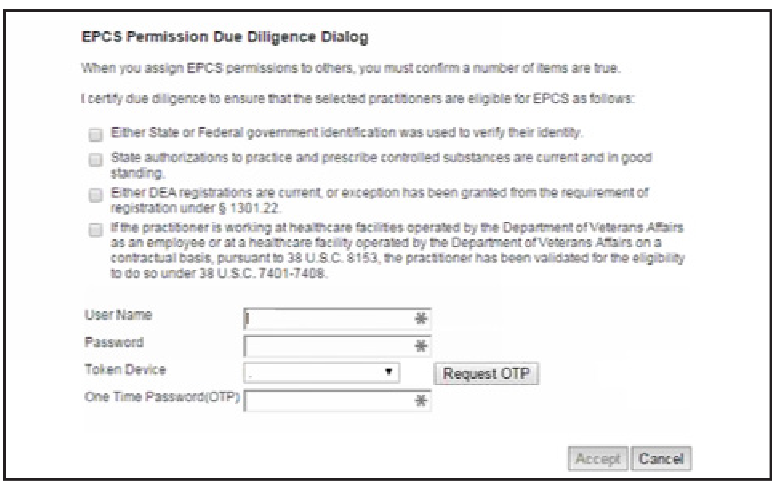
1. Log in to as the Approver, and then open ePrescribe as explained in "Opening ePrescribe" in the Usage chapter.
2. On the right, under **Urgent Message**, click the **Manage EPCS Approvals** link.

   A list of providers who have successfully completed registration appears.



3. Select the check box next to the Provider who you are approving for the signing of electronic prescriptions for controlled substances.
4. Click **Approve EPCS Signing Privilege**.

   The due diligence dialog box appears.



5. Review the information, and select all four check boxes.
6. Enter your Veradigm (formerly Allscripts) security account credentials in the **User Name** and **Password** boxes.
7. Select **Authenticator** from the **Token Device** list.
8. In the **One Time Password (OTP)** box, enter the OTP that you generate with the ID.me Authenticator app on your smart device.
9. Click **Accept**.
10. Close ePrescribe to log out.

Tip: To verify that EPCS registration has been completed for a Provider, so he or she can begin prescribing controlled substances, do the following:

1. Log in to EndoVision as the Provider, and then open ePrescribe as explained in “Opening ePrescribe” in the Usage chapter.
2. To open your ePrescribe user profile, click the pencil icon next to the user name in the upper-right corner.
3. Scroll to the bottom, and verify that **EPCS Permission** has “ON” next to it. If it does, you have the necessary permission to prescribe, sign, and send electronic prescriptions for controlled substances.

Adding Sites in ePrescribe

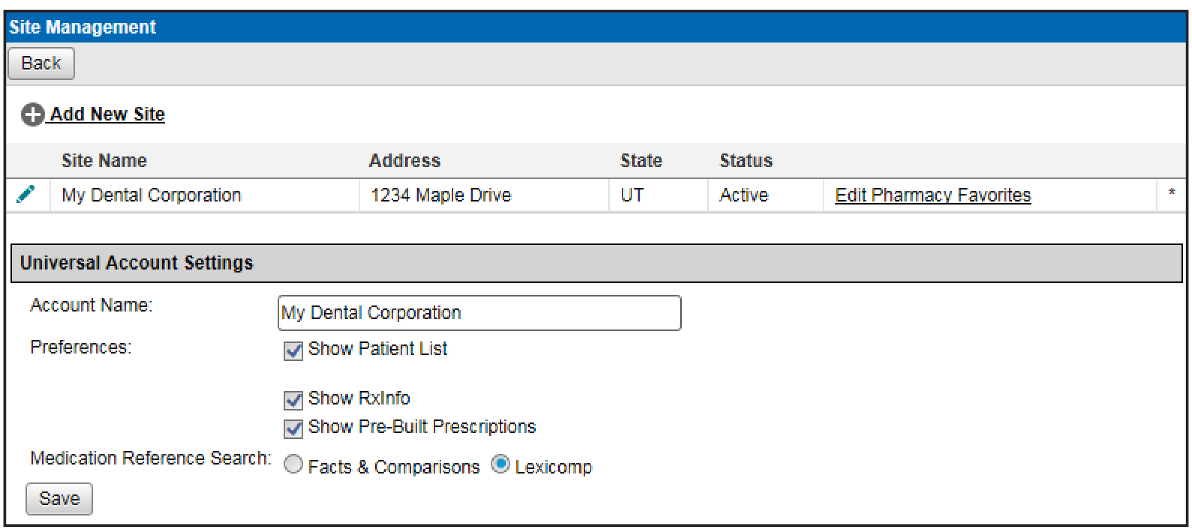
For each location that you join to an existing group and enable for ePrescribe from EndoVision, you must add that location as a “site” from ePrescribe. A stand-alone location or the primary location of a group that you enable for ePrescribe from EndoVision is added automatically as a site in ePrescribe.

Note: If a user attempts to open ePrescribe while logged in to a location that has not been added as a site in ePrescribe, an error message appears, and the user will not be able to use ePrescribe until the location is added as an ePrescribe site.

To add a site in ePrescribe

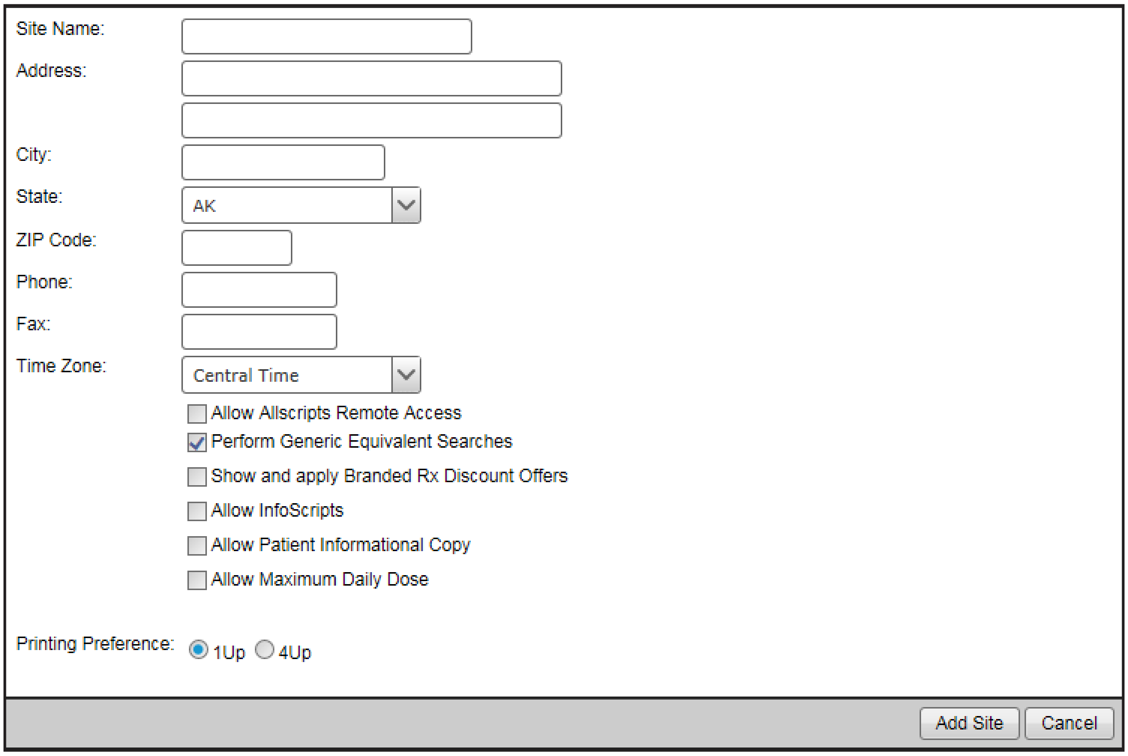
1. Log in to EndoVision in the primary location of a group with a user account that has been enabled as an administrator for ePrescribe. Then, from the File menu, point to Providers, and then click Provider Table**.** Click **e-Rx Tasks**.
2. Click the **Settings** tab.
3. Click the **Site Management** link.

   The **Site Management** page opens and displays a list of sites that have already been added in ePrescribe.



4. Click **Add New Site**.

The options for adding a new site become available.



5. Set up the details for the site: name, address, phone number, fax number, time zone, general preferences, and printing preference.
6. Click **Add Site**.

Note: Do not confuse the **Add Site** button with the **Save** button (in the lower-left corner), which is for the **Universal Account Settings** section of the page.

Usage

This chapter explains the workflow for opening ePrescribe and writing a prescription using ePrescribe. Hints on how to navigate through the ePrescribe module are also provided.

This chapter covers the following topics:

- Opening ePrescribe
- Adding and Editing Patients
- Adding and Editing Allergies
- Adding and Editing Problems
- Entering New Prescriptions

Opening ePrescribe

You can open the ePrescribe module from the Prescriptions module of EndoVision so that you can prescribe medications and submit them electronically to the patient's pharmacy.

To open ePrescribe

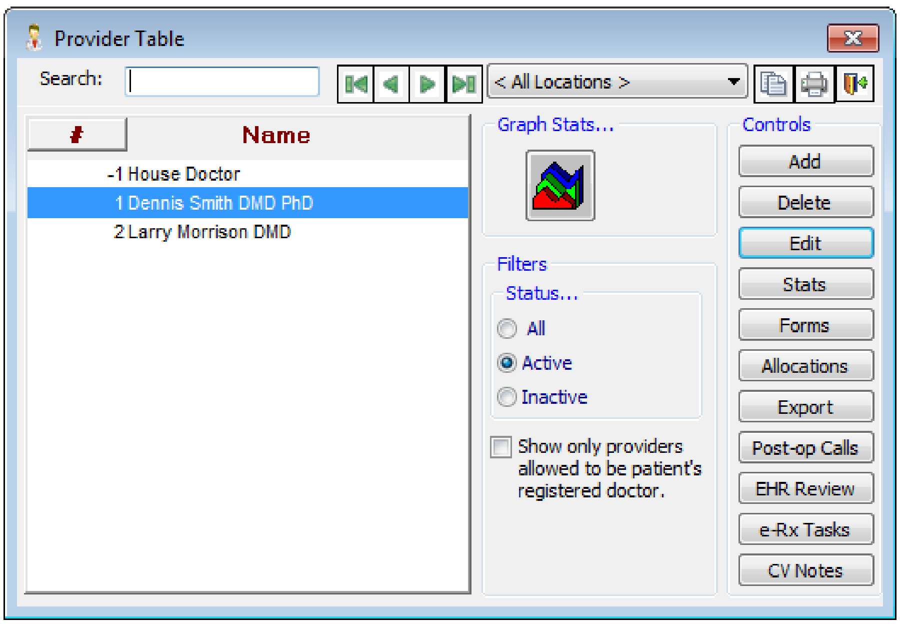
1. Log in to EndoVision with a user account that has been enabled to use ePrescribe.

   Notes:

   - If this is the first time you are opening ePrescribe, for instructions on how to complete the initial identification verification process and agree to the terms and conditions in the EULA, see "Preparing for First-time Use" in the Setup chapter.
   - ePrescribe users are stored in the DDB_ERX_USER_BASE table of your EndoVision database.

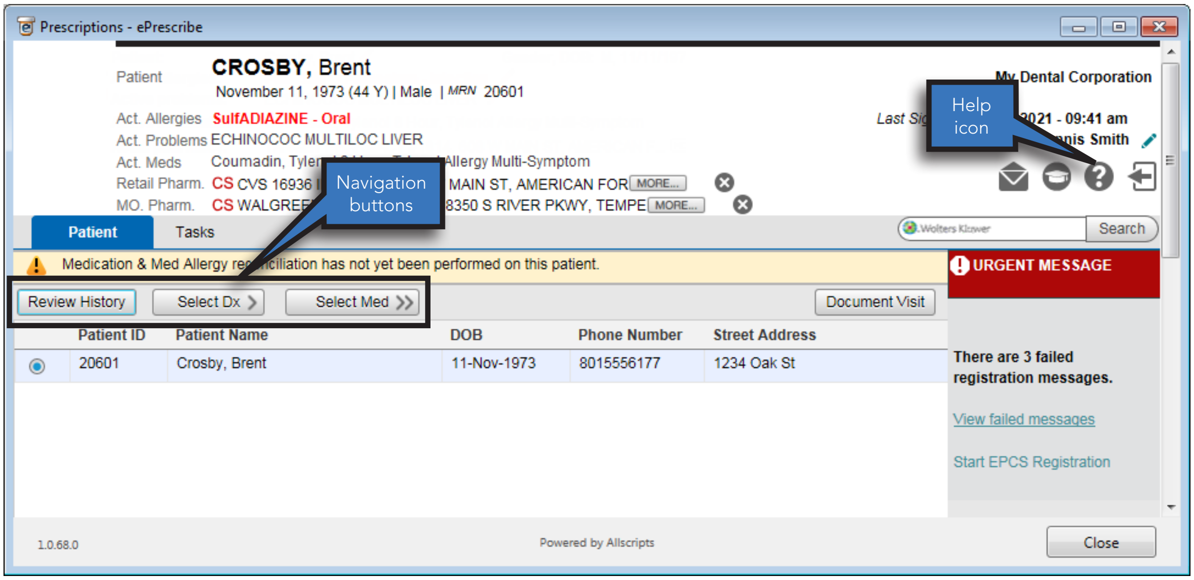
2. From the File menu, point to Providers, and then click Provider Table.

   The **Provider Table** dialog box appears.



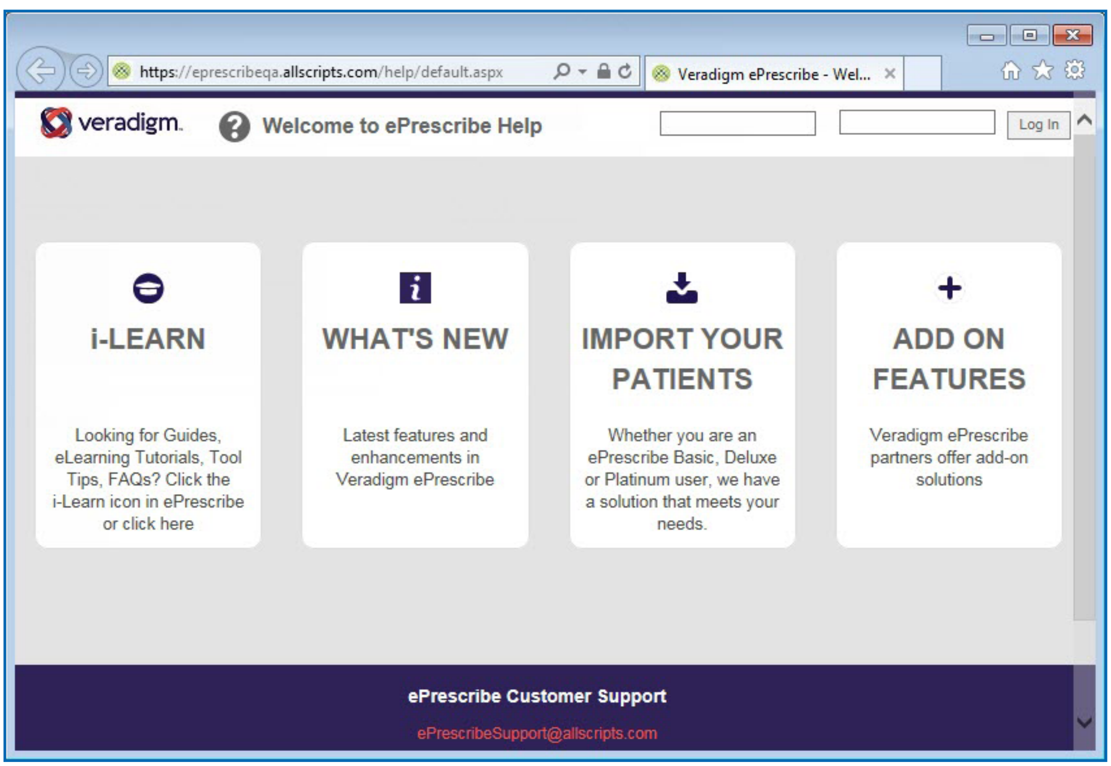
3. Click the e-Rx Tasks button.
4. If you are using ePrescribe in "Test Mode," a dialog box will appear, indicating that ePrescribe is in Test Mode; click **OK** to continue. Otherwise, skip this step.

The ePrescribe module opens.



Tips:

- The navigation buttons are located toward the middle-left area of the window.
- Clicking the **Help** icon opens the Veradigm (formerly Allscripts) ePrescribe Help system in your Web browser.

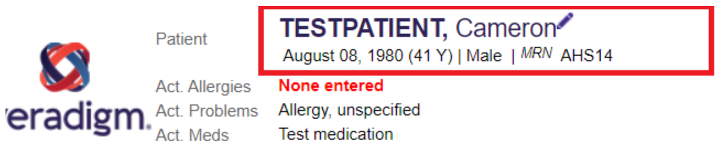


Editing Patients

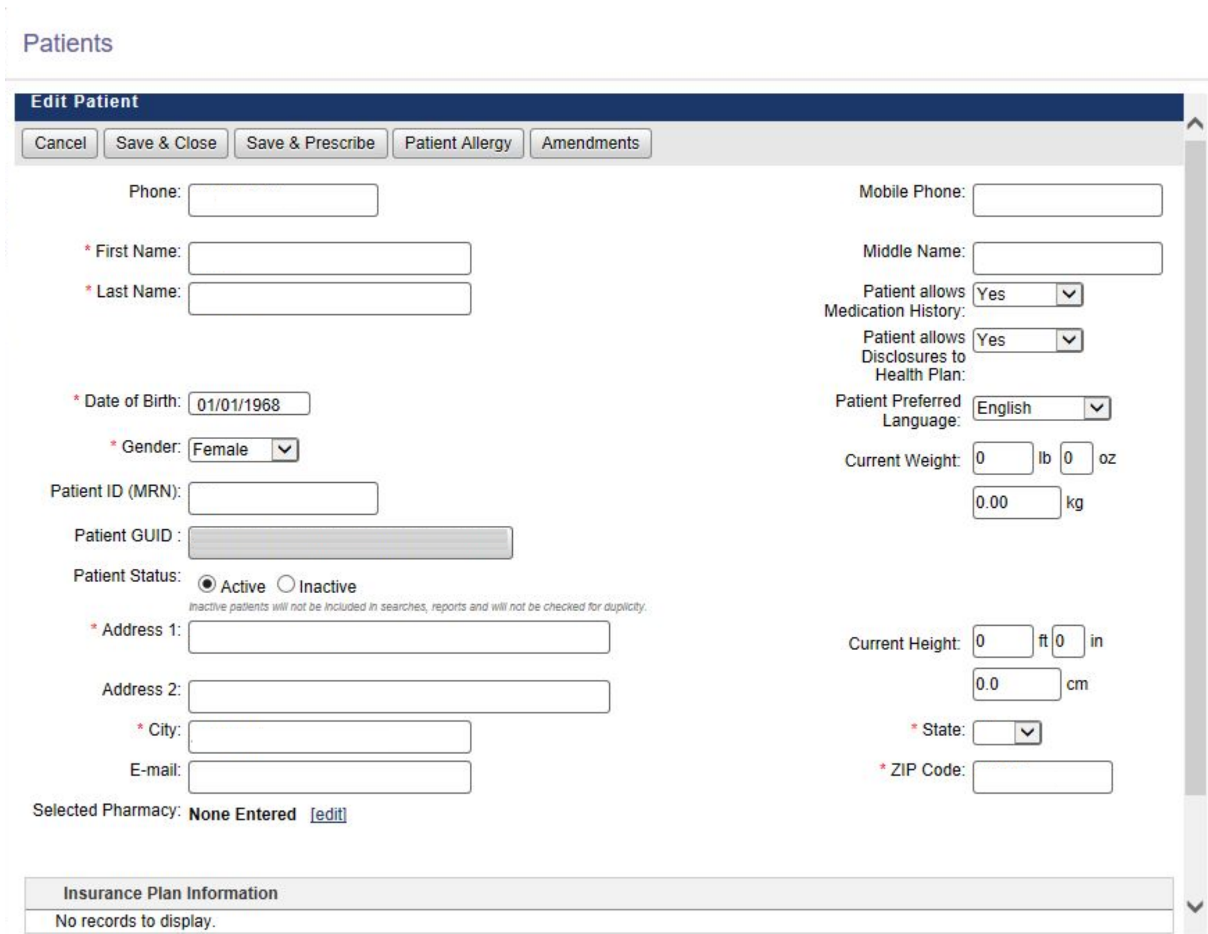
You can edit patient demographic information in ePrescribe.

To edit a patient

1. With the ePrescribe module open, click the pencil icon next to the patient name you want to edit.



The **Edit Patient** screen appears.



2. Click **Insurance Plan Information** at the bottom, and fill in the insurance plan information.
3. When finished, do any of the following:
   - Click **Save & Close** to save the information and close the window.
   - Click **Save & Prescribe** to save the information and open the prescription window.
   - Click **Patient Allergy** to add allergy information for the patient.

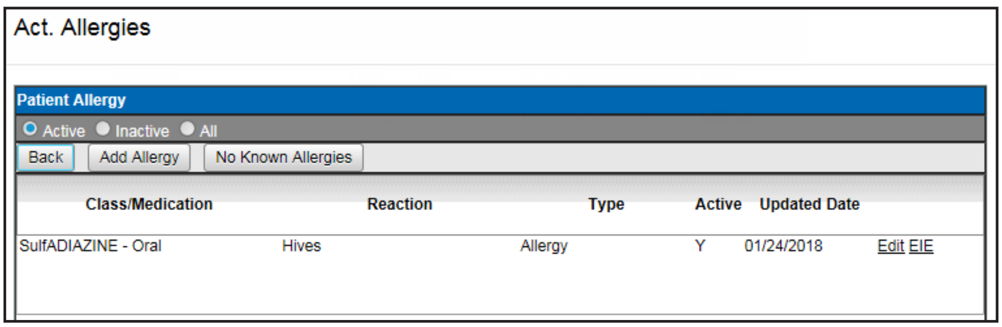
Adding and Editing Allergies

You can add and edit allergies for a patient in ePrescribe.

To add or edit an allergy

1. In ePrescribe, next to **Active allergies**, click the text "None entered" (or the text of any existing allergies).

The **Act. Allergies** dialog box appears.

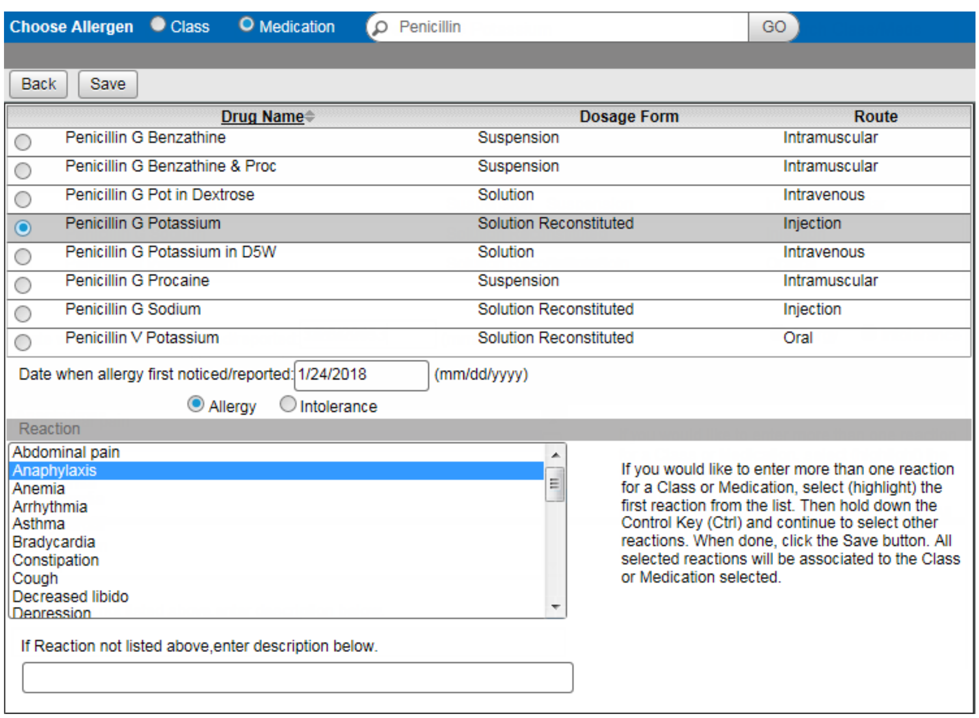


2. Add or edit an allergy, specify that there are no known allergies, or specify that an allergy was entered in error (EIE):

- **Add**

  a. Click **Add Allergy**.

     The search options appear.

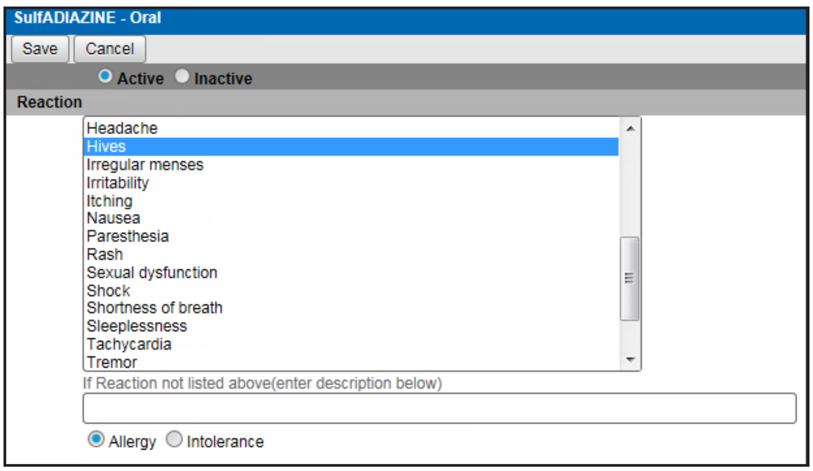


- **b.** Select whether you want to search by **Class** or **Medication**.
- **c.** Type all or part of a class or medication that you want to search for in the **Search Class/Meds** search field, and then click **GO**.
- **d.** Select an item in the search results list
- **e.** Leave today's date, or enter the correct **Date when allergy first noticed/reported**.
- **f.** Select whether you are entering an **Allergy** or an **Intolerance**.
- **g.** Select the patient's **Reaction** to the specified allergen, or if the appropriate reaction is not listed, type a description in the field provided.
- **h.** Click **Save**.
- **i.** Repeat steps a–h as needed.

• **Edit**

- **a.** Click an allergy's **Edit** link.

  The options for editing the allergy appear.



- **b.** Select whether this allergy is **Active** or **Inactive**.
- **c.** Select a **Reaction**, or if the appropriate reaction is not listed, type a description in the field provided.
- **d.** Select whether this is an **Allergy** or **Intolerance**.
- **e.** Click **Save**.
- **f.** Repeat steps a – e as needed.

• **No known allergies**

- **a.** Click **No Known Allergies**.
- **b.** Click **Back** to close the **Act. Allergies** dialog box.

• **Entered in error**

- **a.** Click an allergy's **EIE** link.
- **b.** Repeat as needed.

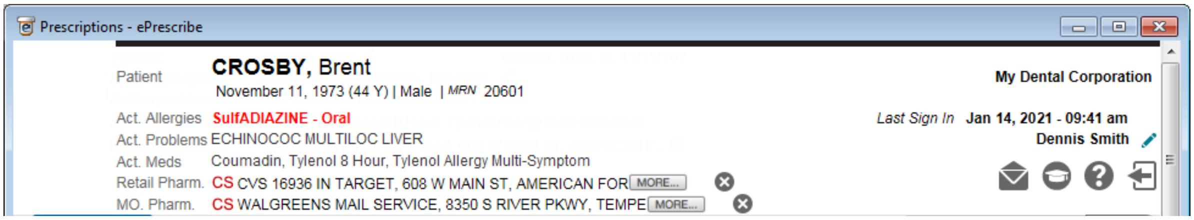
3. Click **Back** to close the **Act. Allergies** dialog box.

Adding and Editing Problems

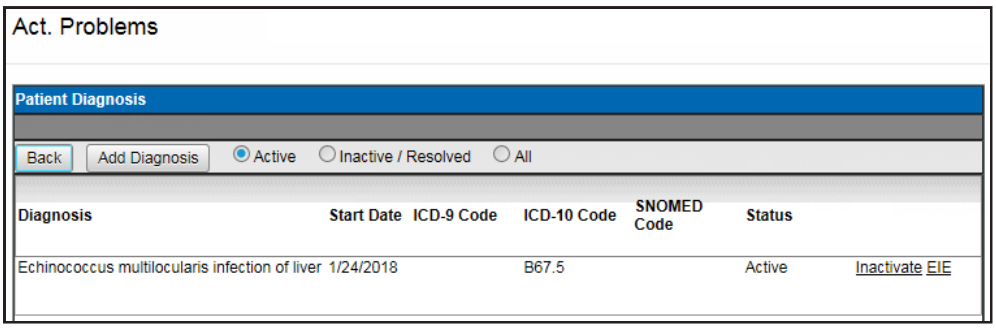
You can add and edit problems for a patient in ePrescribe.

To add or edit a problem

1. In ePrescribe, next to **Active problems**, click the text “None entered” (or the text of any existing problems).



The **Act. Problems** dialog box appears.

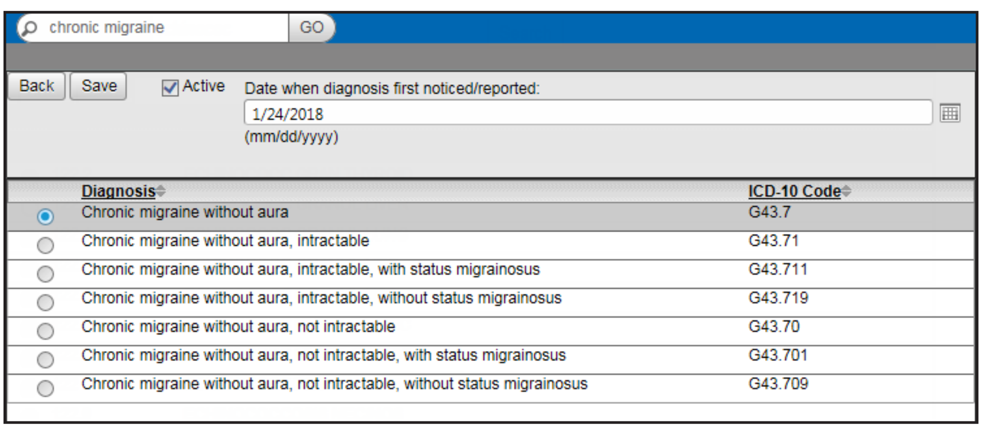


2. Add or inactivate a problem, or specify that a problem was entered in error (EIE):

- **Add**

    a. Click **Add Diagnosis**.

    The search options appear.



    b. Type all or part of a diagnosis that you want to search for in the **Search Diagnosis** search field, and then click **GO**.

    c. Select an item in the search results list

    d. If this is an active problem, select the **Active** check box.

    e. Leave today’s date, or enter the correct **Date when diagnosis first noticed/reported**.

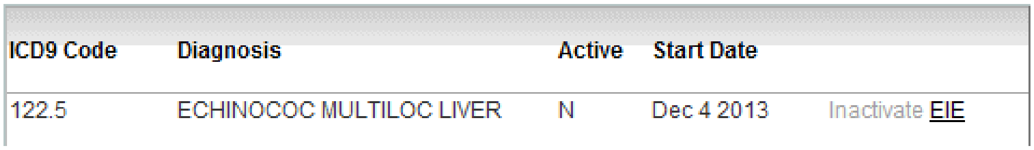
f. Click **Save**.

g. Repeat steps a–f as needed.

- **Inactivate**

  a. Click a problem's **Inactivate** link.

  Note: The problem's **Inactivate** link becomes unavailable.



ICD9 Code	Diagnosis	Active	Start Date	
122.5	ECHINOCOC MULTILOC LIVER	N	Dec 4 2013	Inactivate EIE

  b. Repeat as needed.

- **Entered in error**

  a. Click a problem's **EIE** link.

  b. Repeat as needed.

3. Click **Back** to close the **Act. Problems** dialog box.

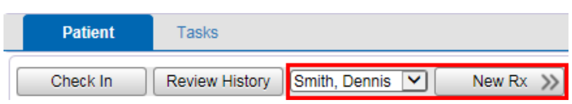
Entering New Prescriptions

You can enter a new prescription into ePrescribe, which you will be able to view in the EndoVision Prescriptions module and the ePrescribe module.

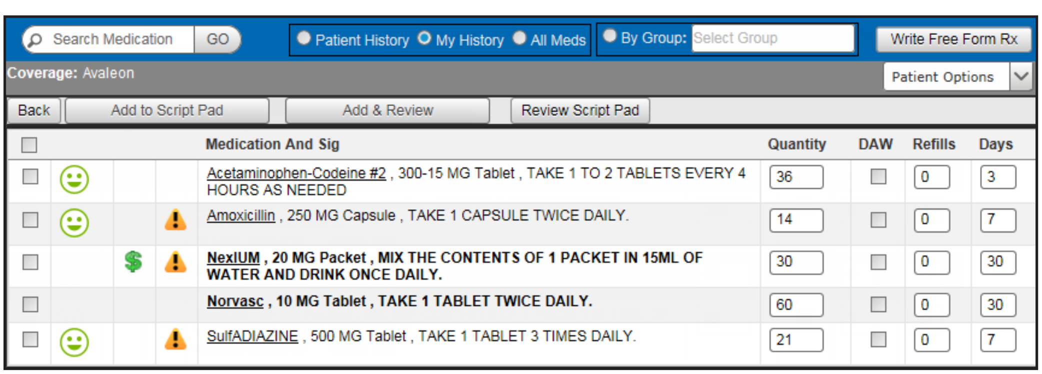
To enter a new prescription

Note: The steps that follow are based on a provider/doctor role. However, for a POB (prescribe on behalf) user role, what you actually see may differ.

1. With the ePrescribe module open, do one of the following:
   - If you are a provider, click **Select Med >>**.
   - If you are someone who prescribes on behalf (POB) of another, select the provider whom you are prescribing on behalf of, and then click **New Rx >>**.



The **Choose Medication** page opens.



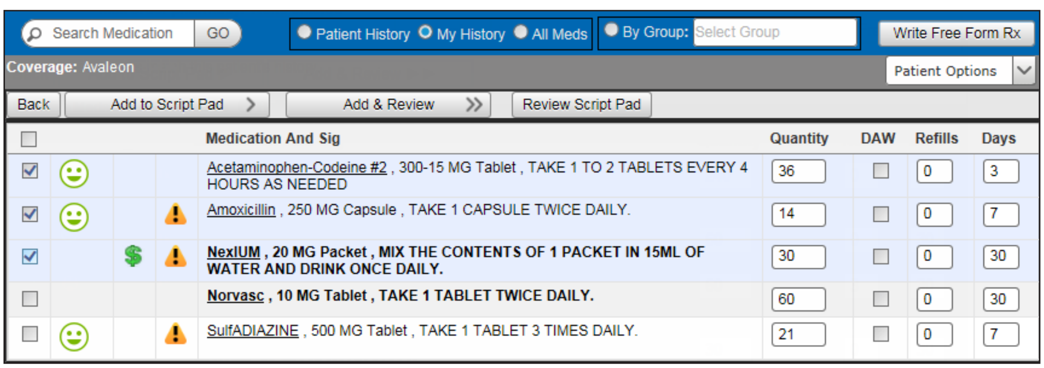
Notes:

- The green, yellow, and red faces represent formulary indicators, which are based on the patient's insurance plan:
  - The green face indicates a preferred status.
  - The yellow face indicates an approved status.
  - The red face is indicates an unapproved status.

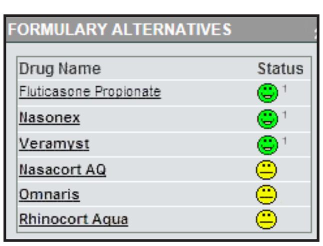
  Additionally, the number next to the faces represents levels of preference within a formulary.
- A yellow triangle represents a pre-emptive drug utilization review (DUR) warning:
  - Drug to drug interactions
  - Adverse reactions
  - Dosage checks
  - Duplicate therapies

2. Search for medications by using any of the following options:
   - **Patient History** – Search the medications prescribed previously for the patient.
   - **My History** – Search the medications that you have prescribed in the past.
   - **All Meds** – Search the entire medication database, which is maintained by Medi-Span.
3. Do one of the following:
   - If you are using the **Patient History** or **My History** search option, do the following:

     a. Select the check boxes of the desired prescriptions. Only complete prescriptions are available for selection.



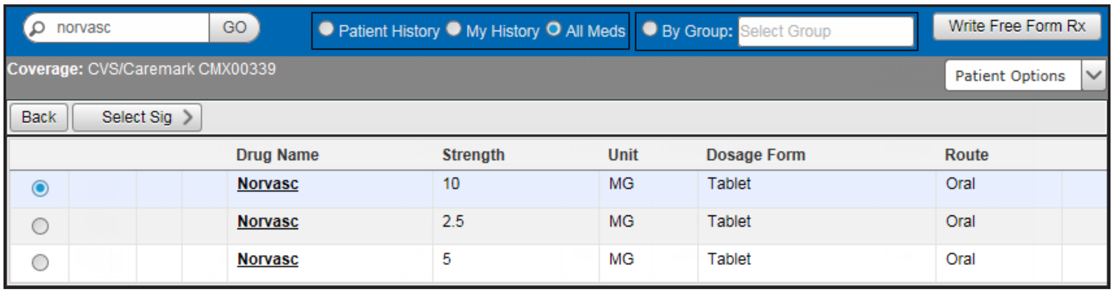
Note: If you select a medication with either a yellow or a red face, the **Formulary Alternatives** panel on the right may be populated, allowing you to choose an alternative medication, which may result in a lower co-payment for the patient.



b. To the right of any medication name, you can change the **Quantity**, **DAW**, **Refills**, and/or **Days** as needed.

- If you are using the **All Meds** search option, do the following:

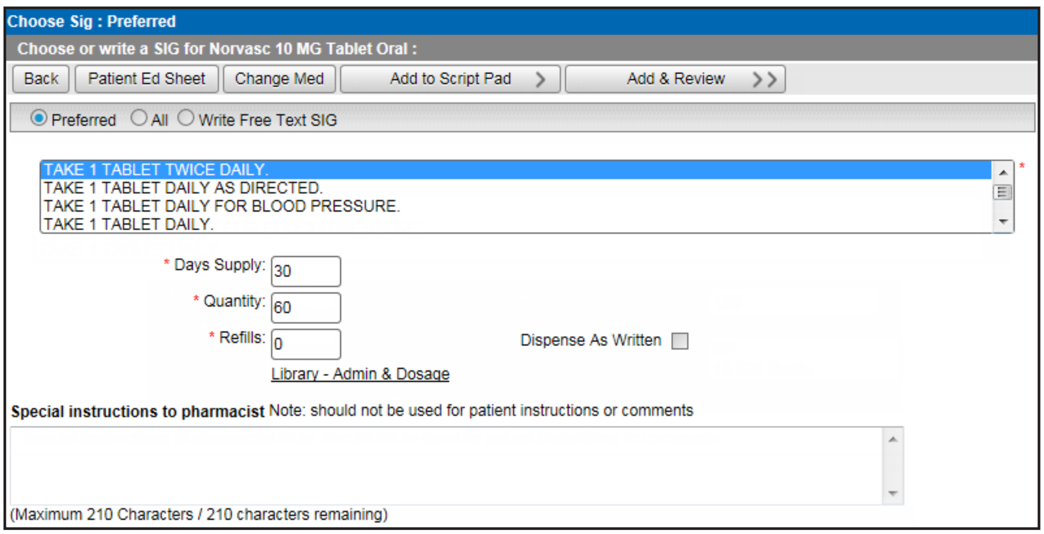
a. Type a medication name in the **Search Medication** search field, and then click **GO**.



b. Select the desired medication.

c. Click **Select Sig >**.

The **Choose SIG** page opens.



d. Select the appropriate sig for the medication being prescribed:

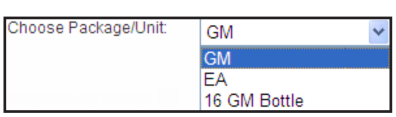
- **Preferred** – Displays a list of the common ways of prescribing this medication.
- **All** – Provides every generic option of prescribing a medication.
- **Write Free Text SIG** – Allows you to write complex directions or to write a sig that cannot be found for **Preferred** or **All**.

e. Set up the following options:

- **Days Supply** – Type the number of days needed for the prescription. Based on the sig and instructions, the correct **Quantity** is entered automatically. However, if your practice dispenses medication by quantity, type a **Quantity** to have the **Days Supply** entered automatically.

  Note: If the calculated quantity on the sig page is above 9,999, a quantity alert appears.

- **Refills** – Type the number of refills for this prescription.
- **Choose Package/Unit** – If this option is available, the list displays packages or units from the smallest to the largest package size.



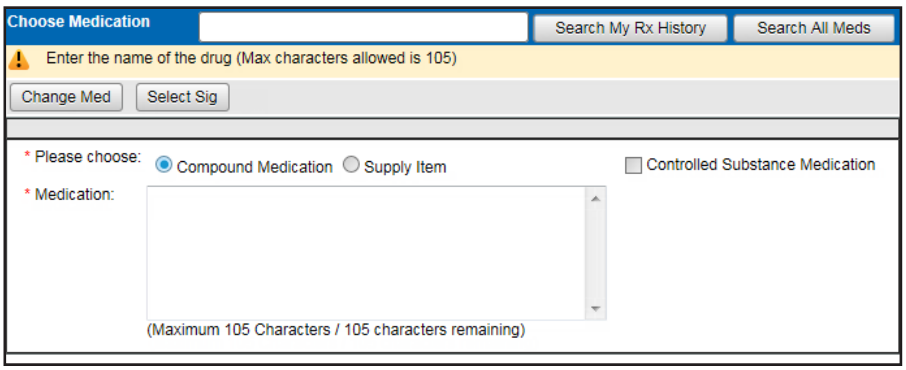
- **Dispense as Written** – Select this check box if no substitutes may be given at the pharmacy.
- **Library - Admin & Dosage** – Click this link to be directed to the Wolters Kluwer facts and comparisons library (Deluxe users only).
- **Special instructions to pharmacist** – Type any additional comments that you want to send with the prescription to the selected pharmacy. The pharmacy staff will be the only ones who see these comments as this is not for communication with the patient.

- To enter a free-form prescription (for a unique prescription), do the following:

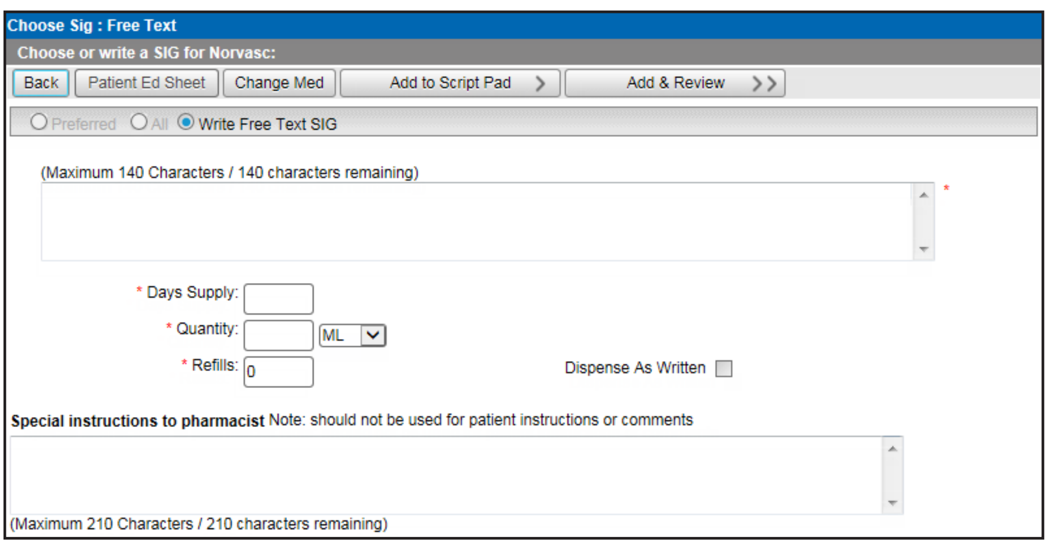
a. Click **Write Free Form Rx**.

b. Next to **Please choose**, select whether this is a **Compound Medication** or a **Supply Item**. If it is a compound medication, and it is a controlled substance, select the **Controlled Substance Medication** check box.

c. In the **Medication** field, type a medication. This field has a maximum limit of 105 characters.



d. Click **Select Sig**.



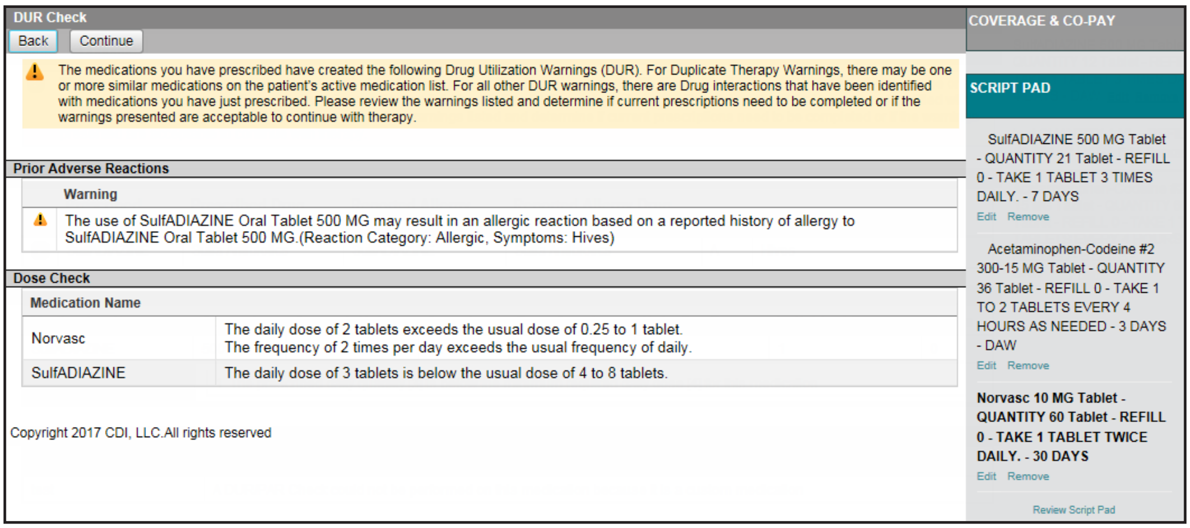
e. In the field, type a free-form prescription. This field has a maximum limit of 140 characters.

f. Set up the following options:

- **Days Supply** – Type the number of days needed for the prescription.
- **Quantity** – Type the quantity of this medication to dispense, and select the unit (such as ML) to dispense this medication in.
- **Refills** – Type the number of refills for this prescription.
- **Dispense as Written** – Select this check box if no substitutes may be given at the pharmacy.

- **Special instructions to pharmacist** – Type any additional comments that you want to send with the prescription to the selected pharmacy. The pharmacy staff will be the only ones who see these comments as this is not for communication with the patient.

4. Do one of the following:
   - To add a medication to your script pad (similar to a shopping cart at an online store) and continue prescribing, click **Add to Script Pad >**. You are returned to the **Choose Medication** page. Repeat steps 1–3 as needed to enter another prescription.
   - If you are done prescribing, to add a medication to your script pad and review your script pad for patient safety and accuracy, click **Add & Review >>**.
5. After you click **Add & Review**, if the **DUR Check** (Drug Utilization Review) page appears, read and respond to it appropriately. Otherwise, if there are no DUR warnings to show, the **DUR Warning** page does not appear, so skip this step.



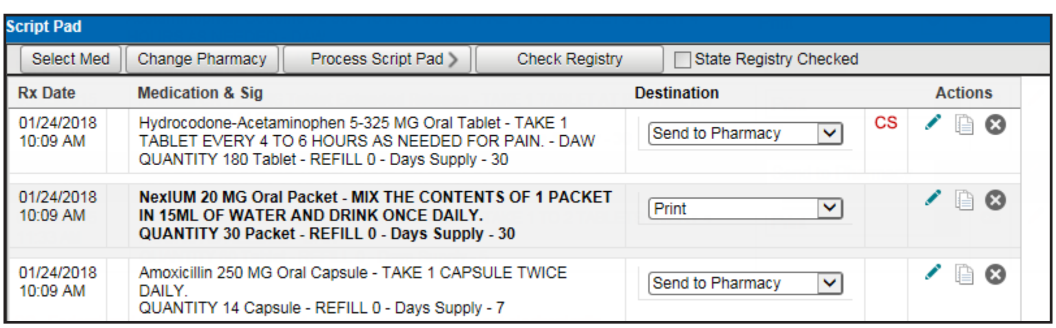
The **DUR Check** page displays all DUR warnings on one screen for all listed medications. The warnings are grouped by category (Prior Adverse Reaction, Duplicate Therapy, Drug to Drug Interaction, and so forth). Do the following:

a. Under **Script Pad** (on the right), for any of the prescriptions listed, click **Edit** to change the prescription or **Remove** to delete the prescription.

b. Click **Continue**.

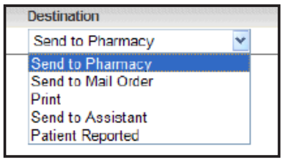
   Note: You cam click **Back** to go back and choose a different medication for the patient, if necessary.

The **Script Pad** page appears.



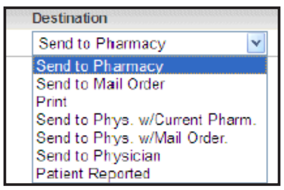
6. Review the listed prescriptions, and select the appropriate **Destination**.

For a provider



- **Send to Pharmacy** – Send the prescription to the retail pharmacy last used by the patient.
- **Send to Mail Order** – Send the prescription to the patient's mail order pharmacy.
- **Print** – Print the prescription for the patient (for any prescription with a Schedule II - V this is the default).
- **Send to Assistant** – Save the prescription and send a task to the assistant's Task List to be processed at a later time.
- **Patient Reported** – Record the prescription in the patient's medical record (does not print or send a prescription to the pharmacy).

For a prescribe on behalf of (POB)

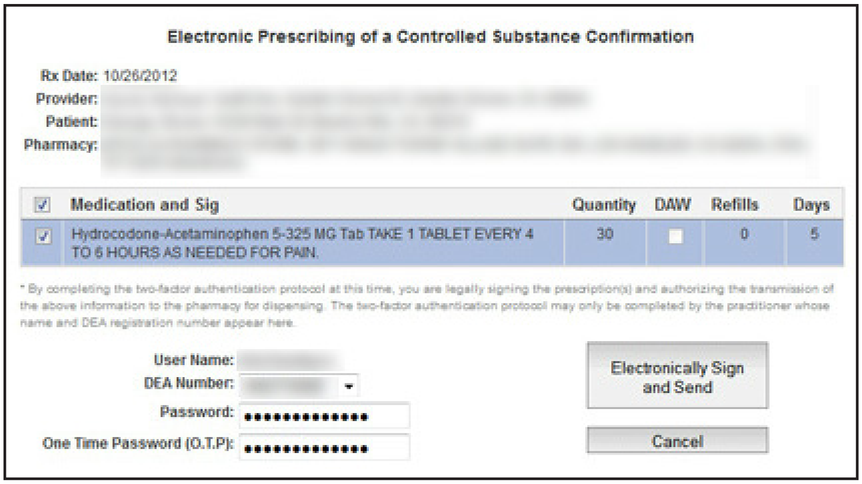


- **Send to Pharmacy** – Send the prescription to the retail pharmacy last used by the patient.
- **Send to Mail Order** – Send the prescription to the patient's mail order pharmacy.
- **Print** – Print the prescription for the patient (for any prescription with a Schedule II - V this is the default).
- **Send to Physician w/ Current Pharmacy** – Send the prescription to the physician with the current retail pharmacy selected (will show up in the doctor's Task List).
- **Send to Physician w/ Mail Order** – Send the prescription to the physician with the current mail order pharmacy selected (will show up in the doctor's Task List).
- **Send to Physician** – Send the prescription to the physician (will show up on the physician's **Tasks** tab).
- **Patient Reported** – Record the prescription in the patient's medical record (does not print or send a prescription to the pharmacy).

Note: You can also perform any of the following **Actions** for a prescription: edit, duplicate, and delete.

7. For provider's in New York, to indicate that you have checked the state registry, select the **State Registry Checked** check box.
8. If needed, do any of the following:
   - To add another medication, click **Select Med**.
   - To change the patient's selected pharmacy, click **Change Pharmacy**.
9. To save the medications within the patient's record, and send the prescriptions to the selected destinations, click **Process Script Pad**.

   If you are electronically sending any prescriptions for controlled substances to a pharmacy, the **Electronic Prescribing of a Controlled Substance Confirmation** dialog box appears. Proceed to step 10.



10. You must electronically sign any prescriptions for controlled substances that you want to electronically send to a pharmacy:

   a. Select the check boxes of the prescriptions that you want to be processed.

      Note: Your user name appears for your reference, and your DEA number is selected automatically.

   b. Enter your Veradigm (formerly Allscripts) security account credentials in the **User Name** and **Password** boxes.

   c. In the **One Time Password (O.T.P.)** box, enter the OTP that you generate with the ID.me Authenticator app on your smart device.

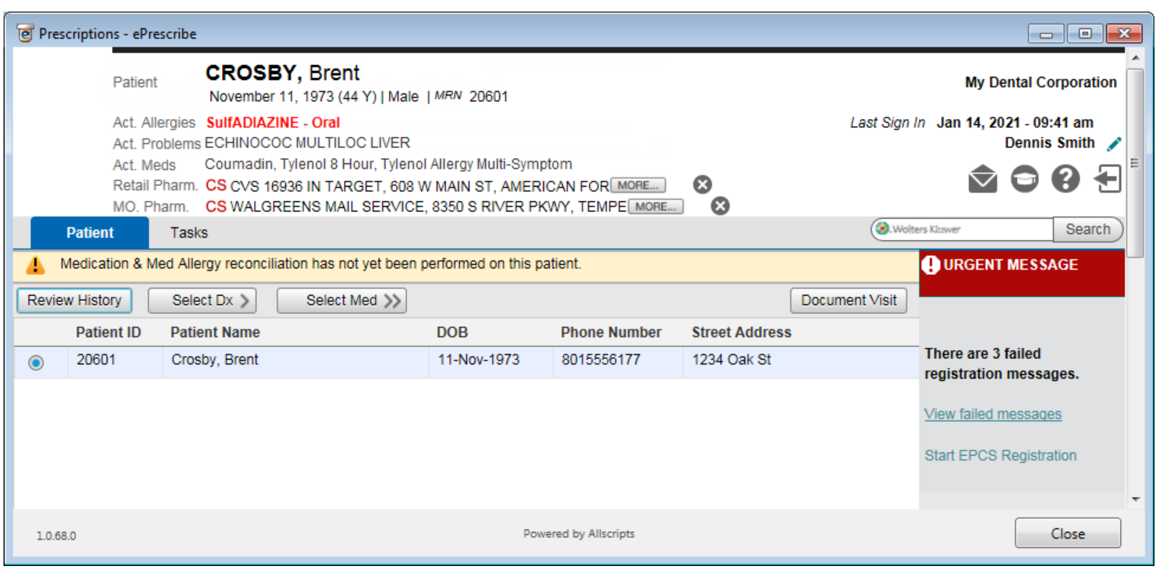
   d. Click **Electronically Sign and Send**.

Updating Patient Records

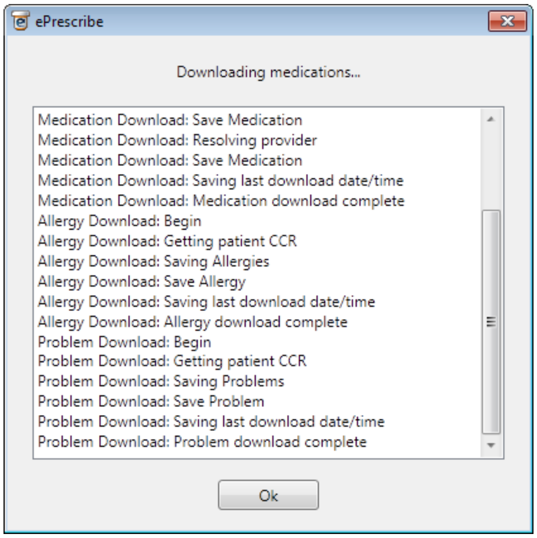
After you add medical alerts/problems, medications, and allergies for a patient in ePrescribe, you can choose to add any or none of them to the corresponding patient's record in .

To update a patient's record

1. After entering prescriptions, allergies, and/or problems, close ePrescribe.



A dialog box appears, showing the progress of the download.



2. Click **Ok**.

   The **Comparison** dialog box appears with the **Problems** tab selected.

3. Reconcile data on the CCR document with data already in the patient's record in EndoVision. You can click each tab or click **Previous** or **Next** to navigate between each tab. The following tabs are be available:

   Problems

   - **Data from Document** – The list displays the problems on the document that you can add to the patient's record. For each problem, select **Add To** Patient or **Do Not Add** from the **Action** list to specify whether you want to add or not add the problem to the patient's record.
   - **Data in** EndoVision – The list displays the problems that already exist in the patient's record. For each problem, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from EndoVision will be available only in an audit trail report.

   Medications

   - **Data from Document** – The list displays the medications on the document that you can add to the patient's record. For each medication, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the medication to the patient's record.
   - **Data in** EndoVision – The list displays the medications that already exist in the patient's record. For each mediation, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from EndoVision will be available only in an audit trail report.

   Allergies

   - **Data from Document** – The list displays the medication allergies on the document that you can add to the patient's record. For each allergy, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the allergy to the patient's record.
   - **Data in** EndoVision – The list displays the medication allergies that already exist in the patient's record. For each allergy, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from EndoVision will be available only in an audit trail report.

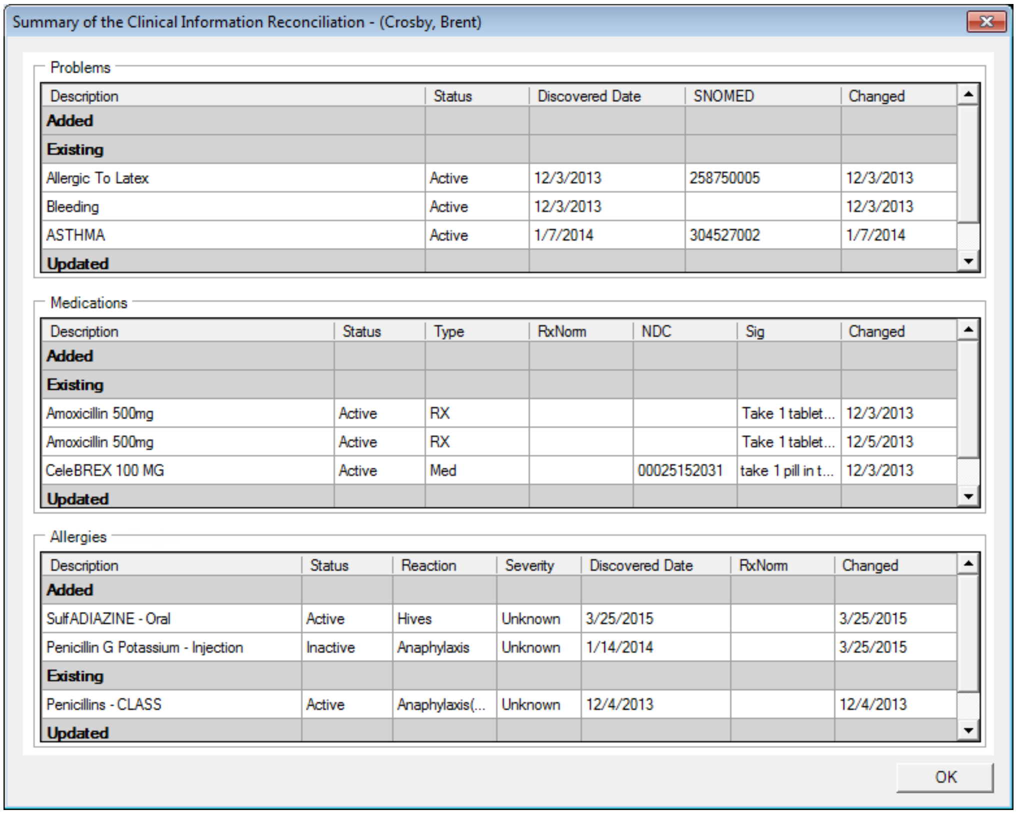
4. To view all the resulting changes to the problems, medications, and allergies (based on your selections on each tab), click **Preview Consolidated List**. Then, click **OK** to close the preview dialog box.

5. Click **Finish**.

   A confirmation message appears.

6. Click **Yes** to make the changes to the patient's record.

A summary of the reconciliation appears.



Summary of the Clinical Information Reconciliation - (Crosby, Brent)

Problems

Description	Status	Discovered Date	SNOMED	Changed
Added				
Existing				
Allergic To Latex	Active	12/3/2013	258750005	12/3/2013
Bleeding	Active	12/3/2013		12/3/2013
ASTHMA	Active	1/7/2014	304527002	1/7/2014
Updated				

Medications

Description	Status	Type	RxNorm	NDC	Sig	Changed
Added						
Existing						
Amoxicillin 500mg	Active	RX			Take 1 tablet...	12/3/2013
Amoxicillin 500mg	Active	RX			Take 1 tablet...	12/5/2013
CeleBREX 100 MG	Active	Med		00025152031	take 1 pill in t...	12/3/2013
Updated						

Allergies

Description	Status	Reaction	Severity	Discovered Date	RxNorm	Changed
Added						
SulfADIAZINE - Oral	Active	Hives	Unknown	3/25/2015		3/25/2015
Penicillin G Potassium - Injection	Inactive	Anaphylaxis	Unknown	1/14/2014		3/25/2015
Existing						
Penicillins - CLASS	Active	Anaphylaxis(...	Unknown	12/4/2013		12/4/2013
Updated						

OK

7. Click **OK**.