ePrescribe Setup Guide

(For Standalone ePrescribe Users)

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Introduction & Setup

ePrescribe allows you to submit prescriptions to pharmacies online. To use ePrescribe, you must purchase a license. 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 the following topics about how to activate ePrescribe and set up sites and users to use ePrescribe.

- Meeting the Pre-requisites
- Preparing for First-time Use
- Linking an ePrescribe Account
- Registering for EPCS
- Adding Sites in ePrescribe

Meeting the Pre-requisites

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

Purchase ePrescribe licenses:

- Call your sales manager, or
- Call the sales department at 866-624-4095.

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.

Preparing for First-time Use

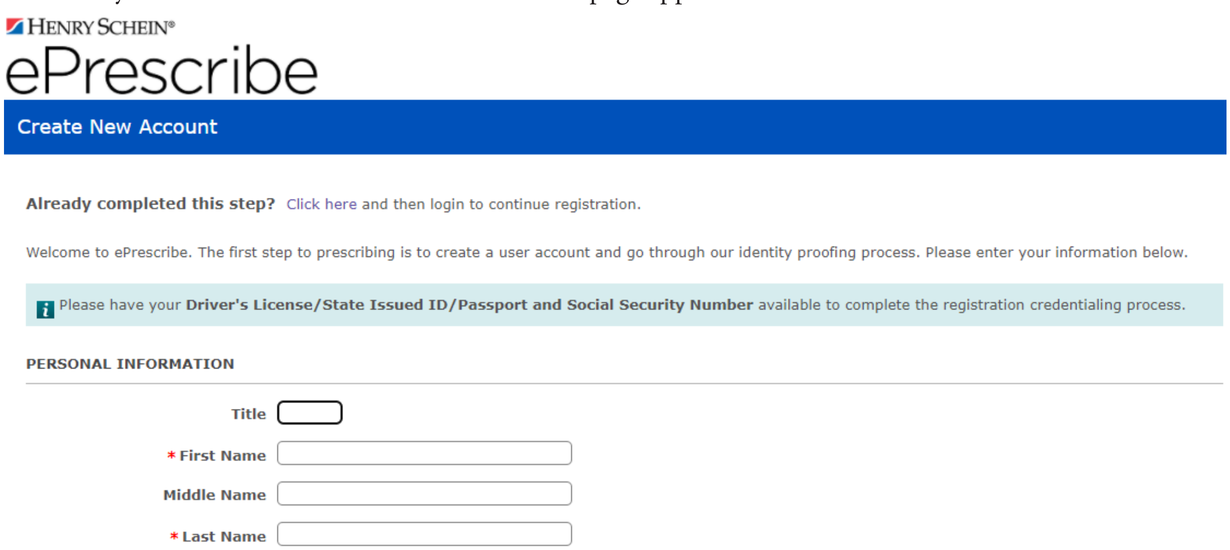
The first time a user who has been enabled to use ePrescribe opens ePrescribe, he or she must go through an identity verification process and accept the End User License Agreement (EULA) for Veradigm (formerly Allscripts) ePrescribe. Providers who prescribe medications must complete additional identity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

   The Henry Schein ePrescribe **Create New Account** page appears.

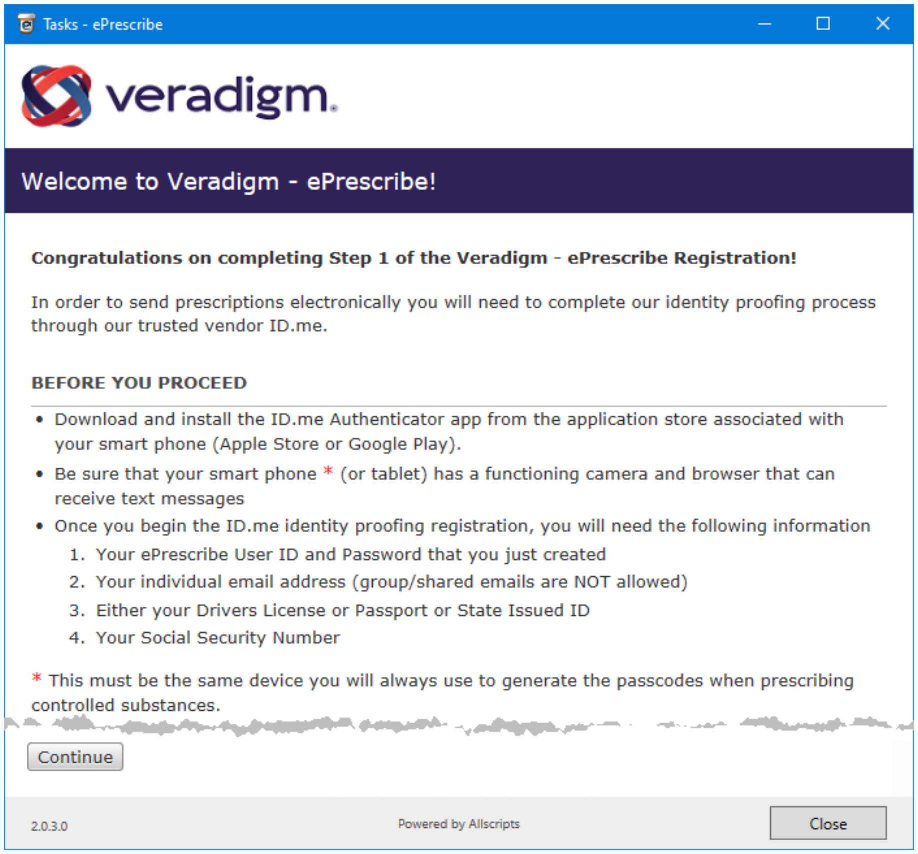


2. Fill out the form, and then click **Submit**.

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

3. Close and reopen ePrescribe.

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

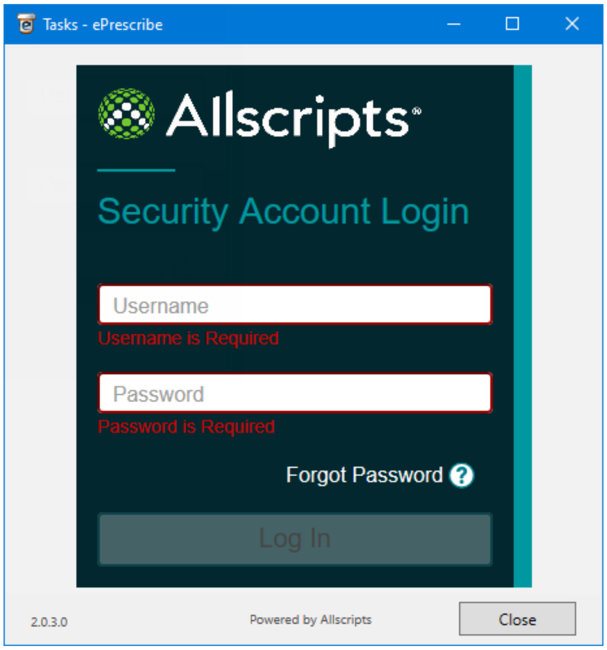


Important: To verify your identity through ID.me, you must have the following:

- 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.
- The ID.me Authenticator app (which is used for two-factor authentication) installed on the smart device. 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.

4. Click **Continue**.

The **Security Account Login** page appears.



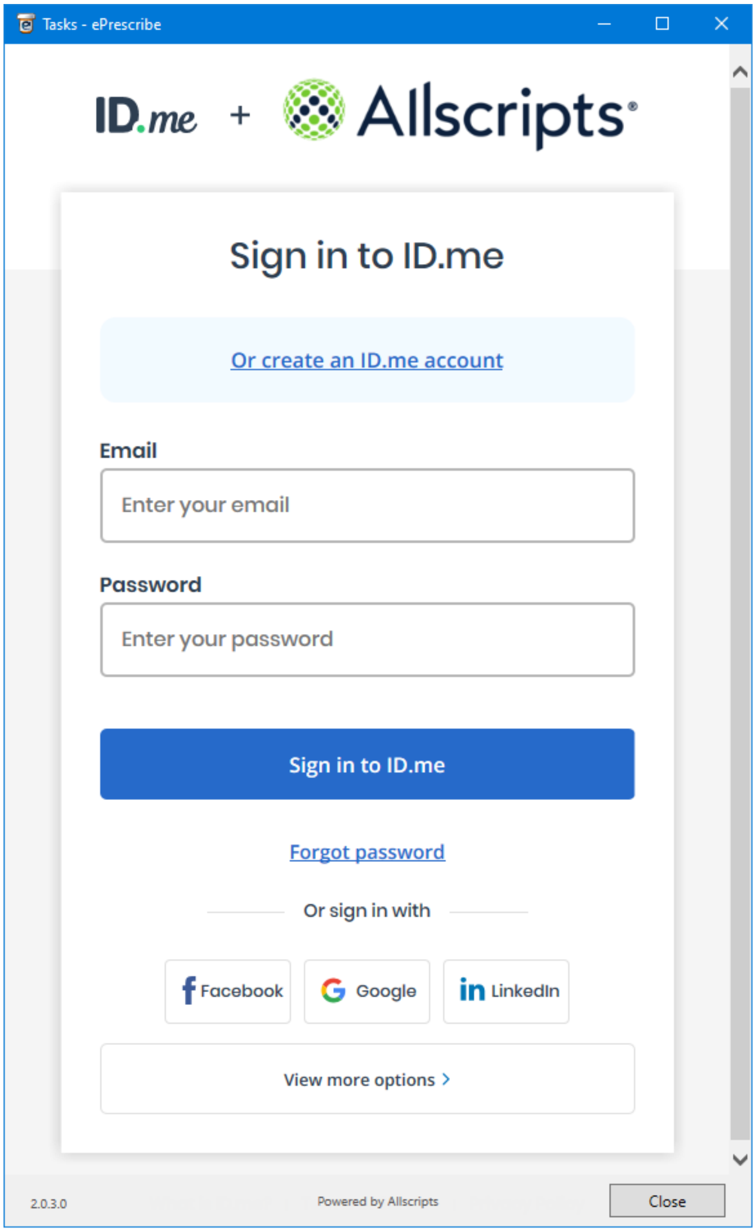
5. Enter your Veradigm (formerly Allscripts) security account credentials, and then click **Log In**.

Creating an ID.me Account

After creating your Veradigm security account, you'll need to create an ID.me account 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.

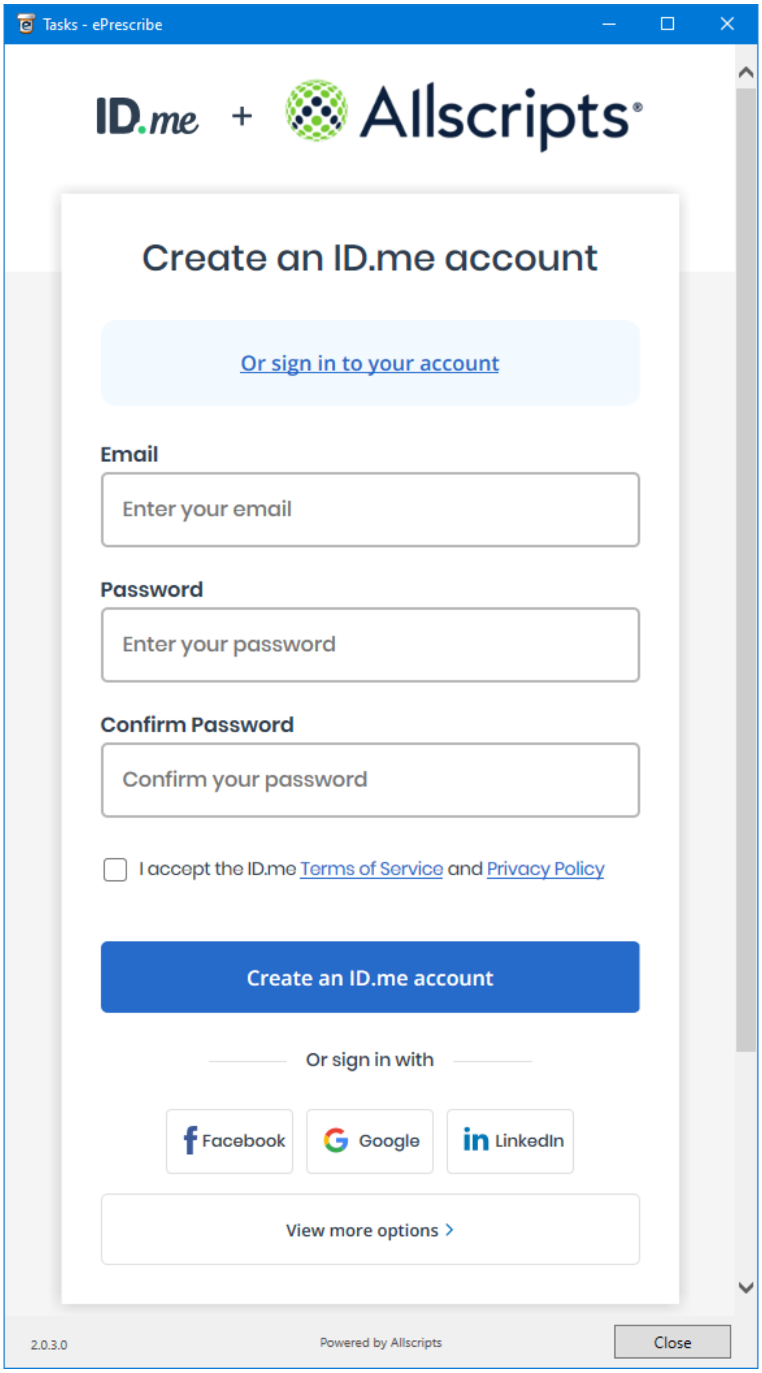
After logging in to your Veradigm (formerly Allscripts) security account, the **Sign in to ID.me** page appears.



1. Do one of the following:
   - If you already have an ID.me account, enter the applicable **Email** address and **Password**, and then click **Sign in to ID.me**.
   - If you do not have an ID.me account, create one:

     a. Click the **Or create an ID.me account** link.

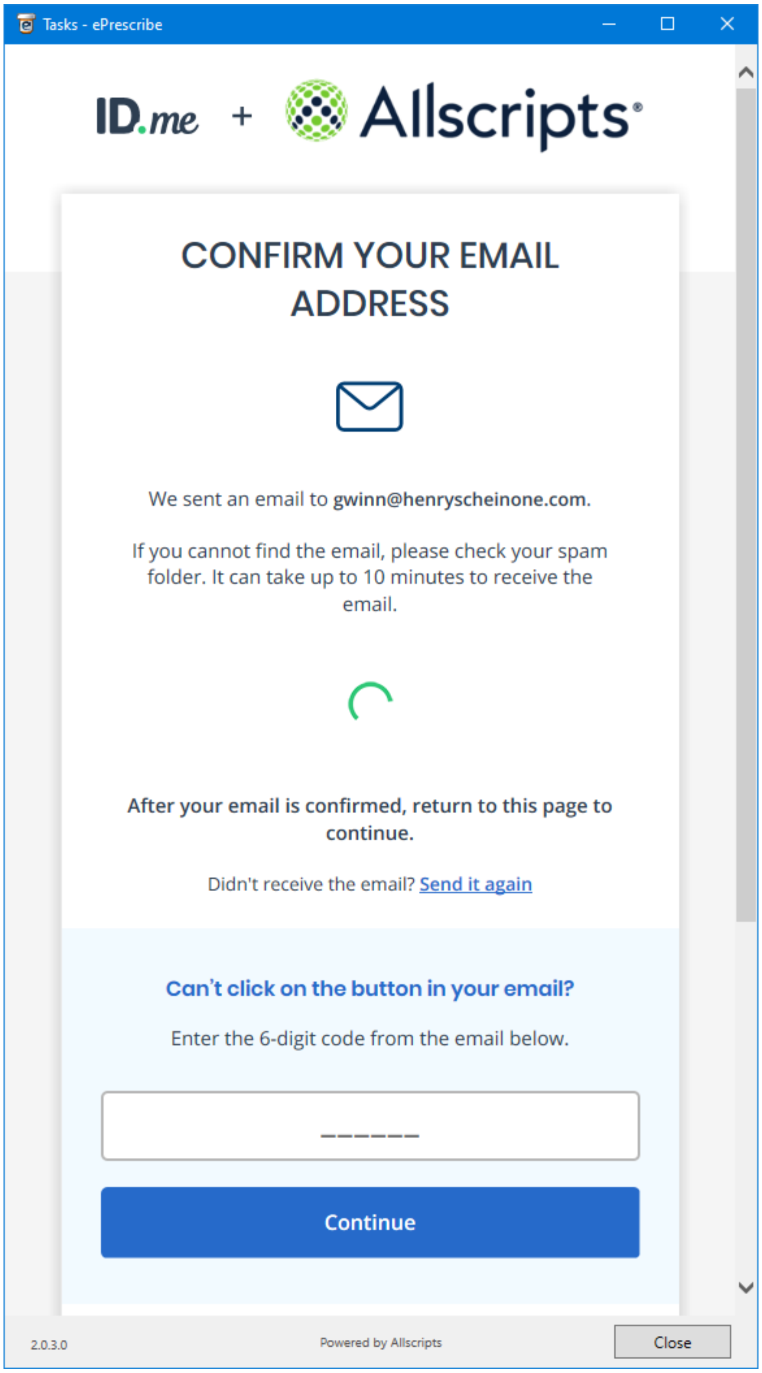
The **Create an ID.me account** page appears.



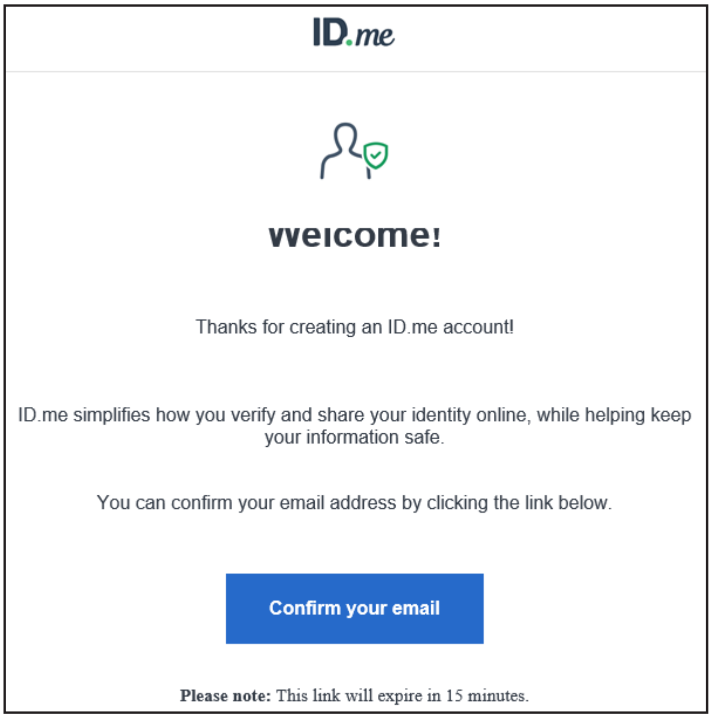
b. Enter your email address in the **Email** box, enter a password in the **Password** and **Confirm Password** boxes, and select the **I accept the ID.me Terms of Service and Privacy Policy** check box.

c. Click **Create an ID.me account**.

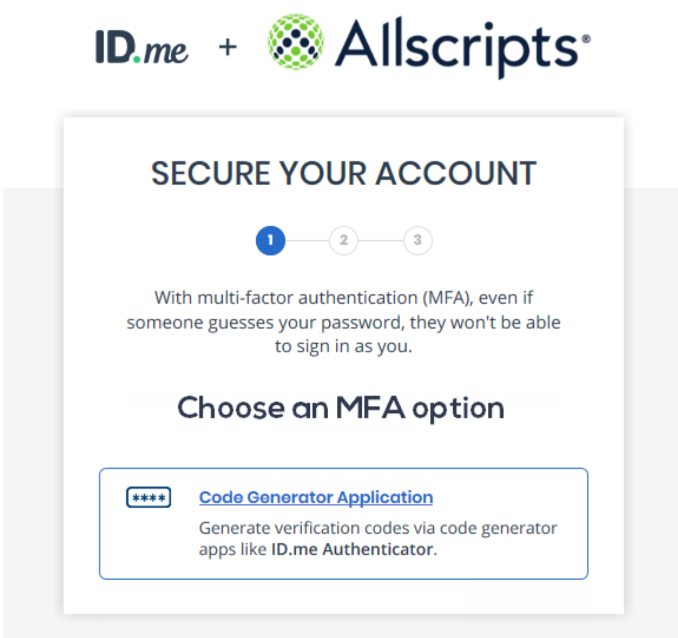
The **Confirm Your Email Address** page appears.



d. Locate the **Welcome to ID.me** email message in your email program's inbox, and then click **Confirm your email**.



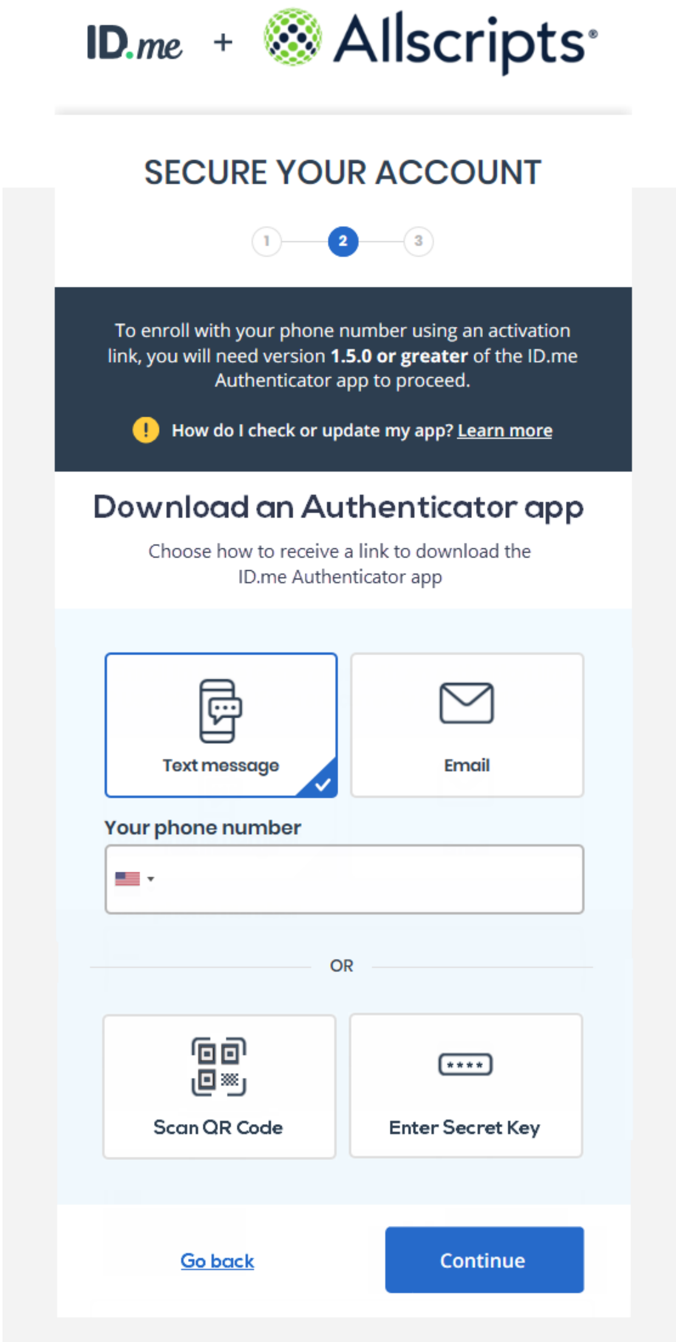
In Prescribe, the **Secure Your Account** page appears and displays the multi-factor authentication options.



2. Set up two-factor authentication:

a. Click the **Code Generator Application** box.

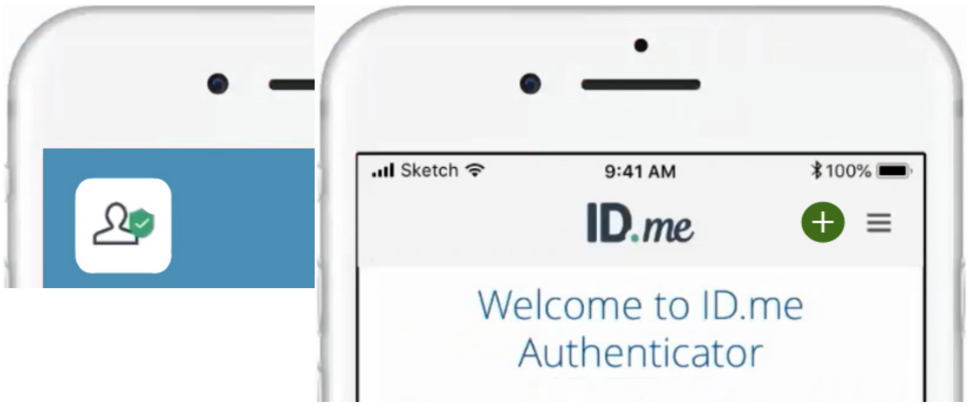
The enrollment options appear.



b. Click **Enroll with barcode/secret key**.

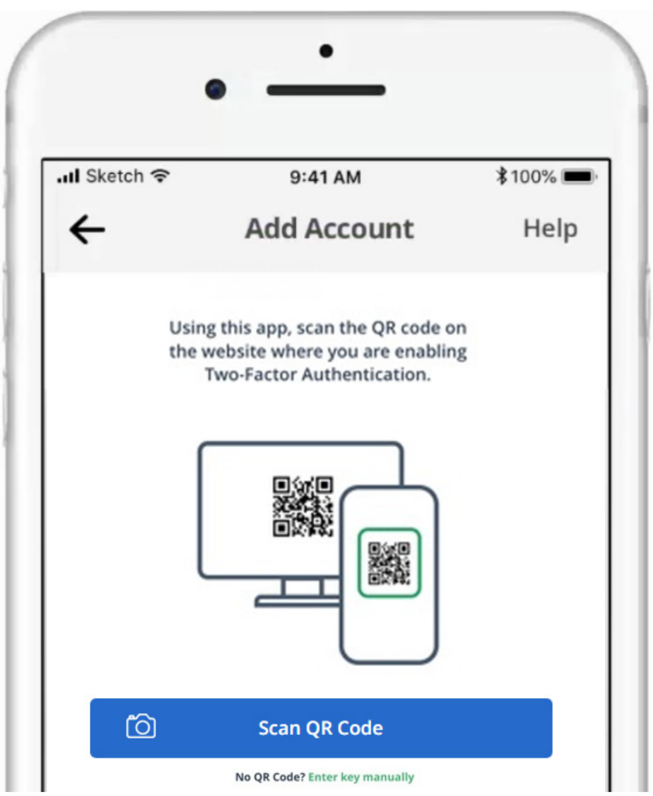
A QR code appears.

c. Open the ID.me Authenticator app on your smart device.



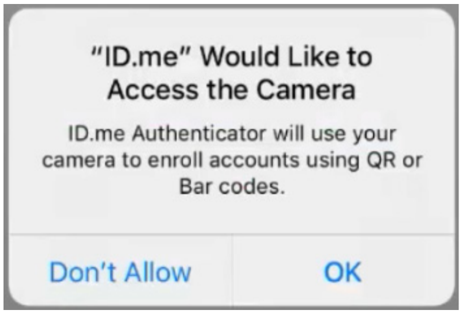
d. Tap the plus sign (+) in the upper-right corner.

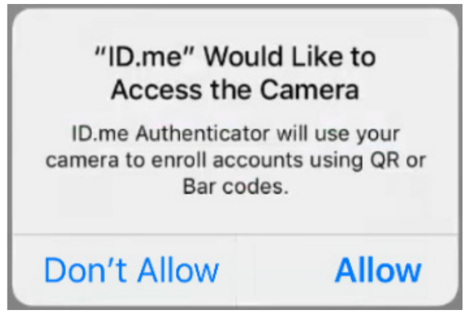
The options to add an account appear.



e. Tap **Scan QR Code**.

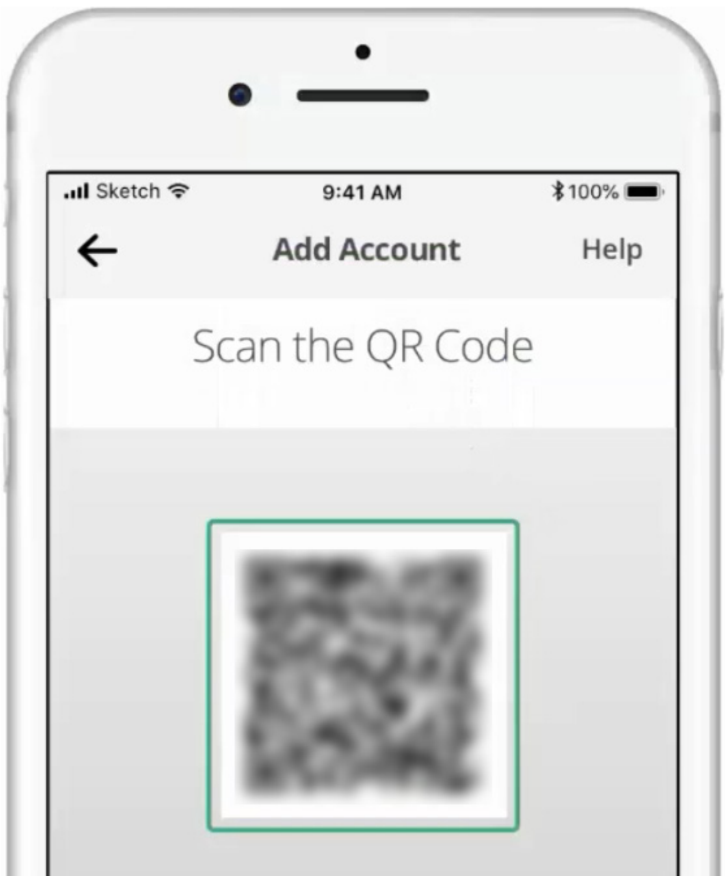
An access message appears.



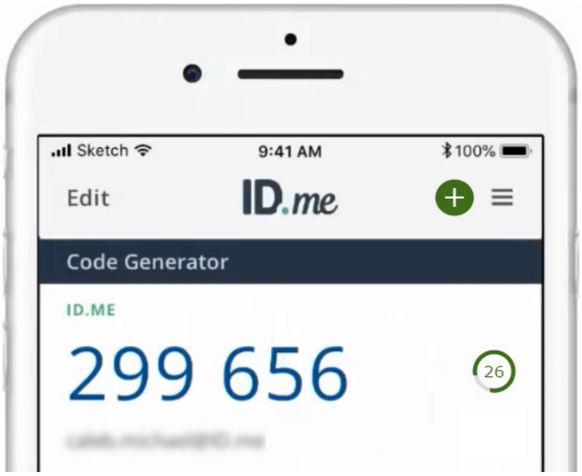


f. Tap **OK** or **Allow** to allow ID.me Authenticator to have access to your device's camera.

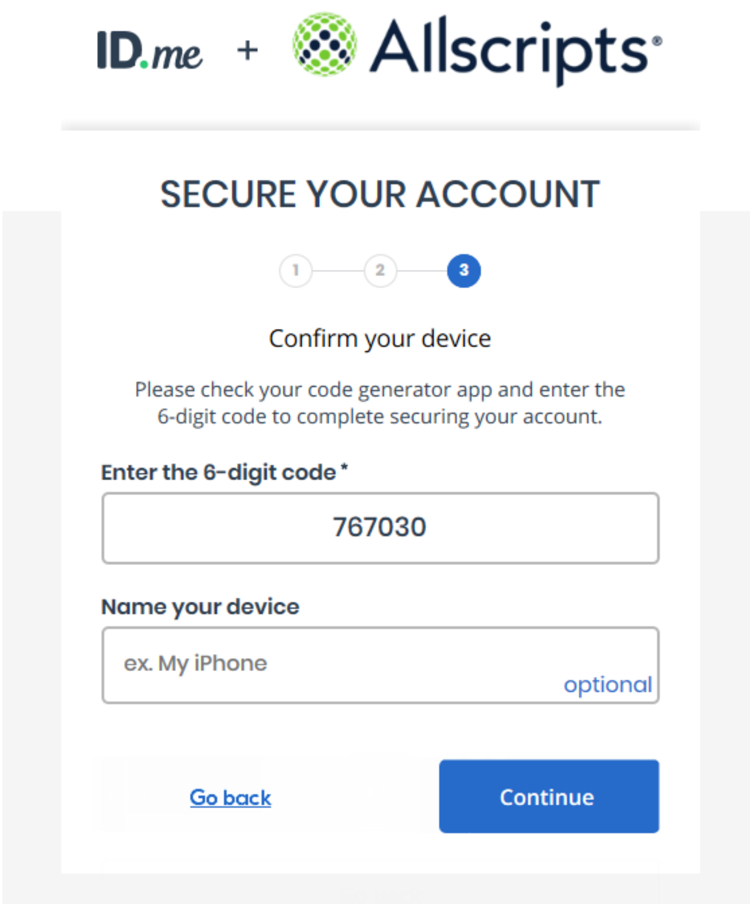
g. Point your device's camera at the QR code being displayed in ePrescribe.



When the phone captures the QR code, a six-digit code appears in the ID.me Authenticator app.

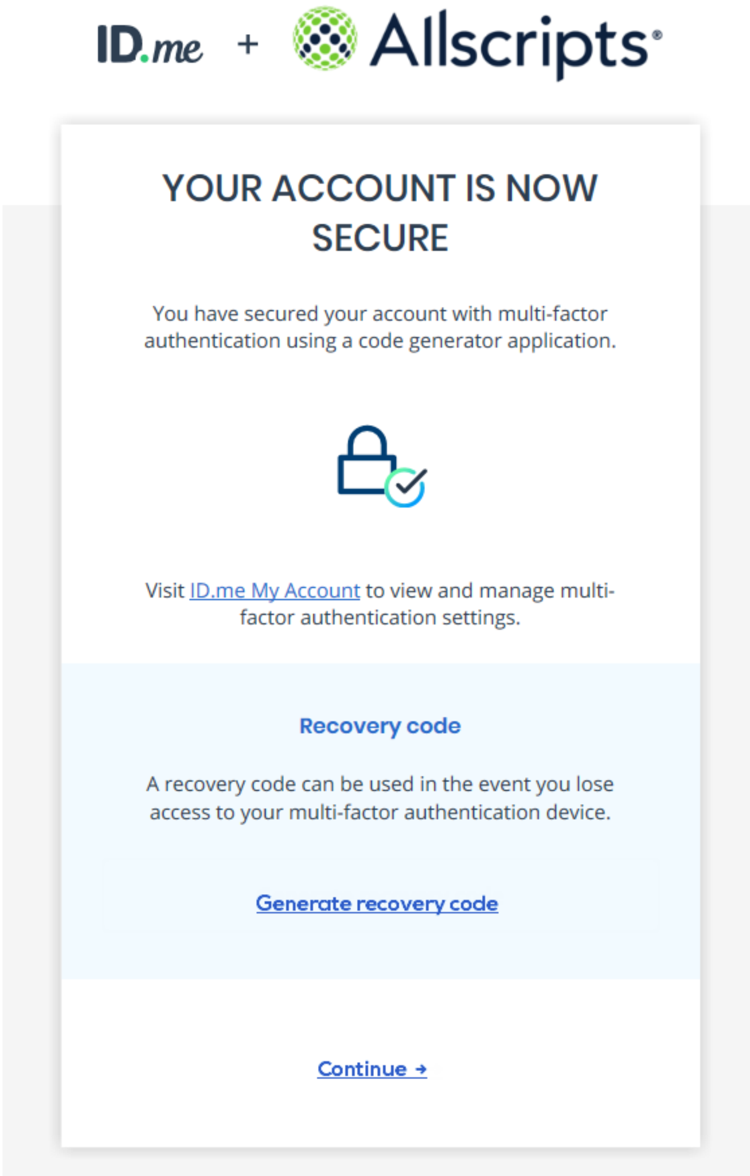


In ePrescribe, the **Secure Your Account** page displays the confirmation options.



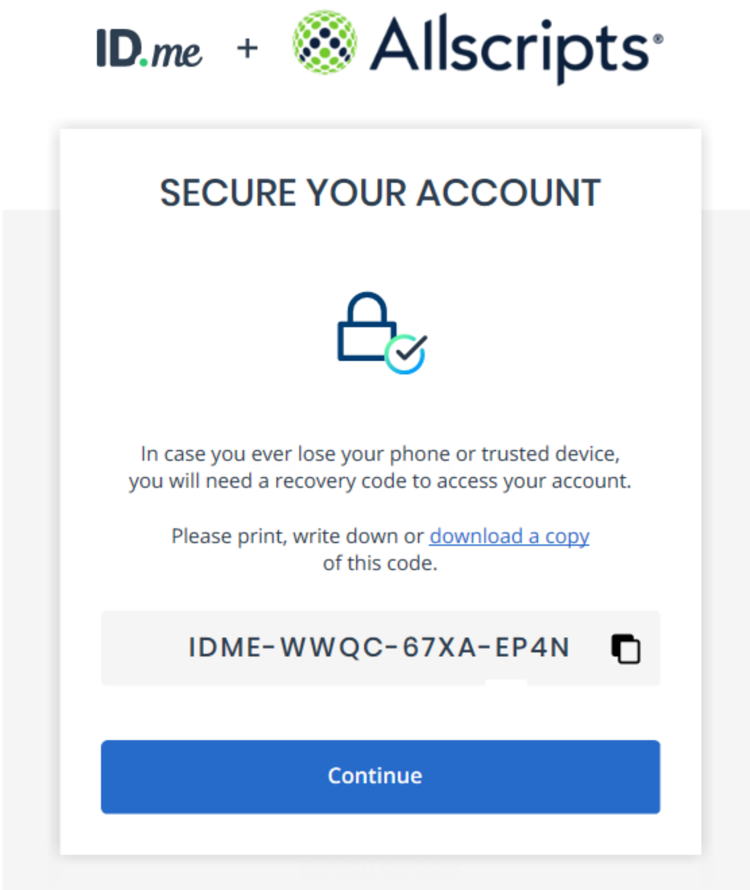
h. In the **Enter the 6-digit code** box, enter the code from your smart device, and then click **Continue**.

The **Your Account Is Now Secure** page appears.



i. Click **Generate recovery code**.

The generated recovery code appears.

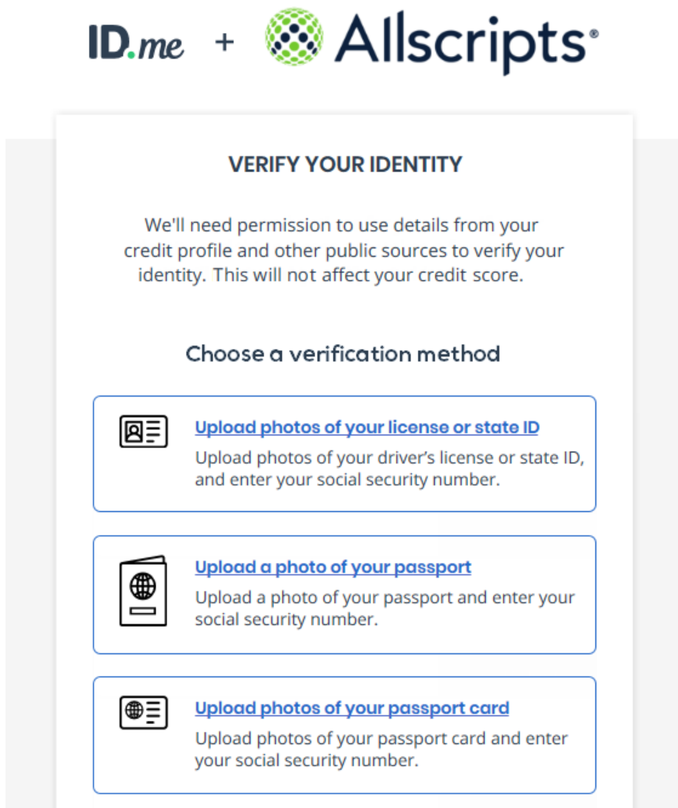


j. Click the **download a copy** link to save the recovery code as .pdf file in a safe storage location.

Note: This recovery code is a one-time use code that allows you to access 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. A new recovery code will be generated automatically after the previous code is used. You must download and save the new recovery code each time.

k. Click **I have copied the recovery code**.

The **Verify Your Identity** page appears.



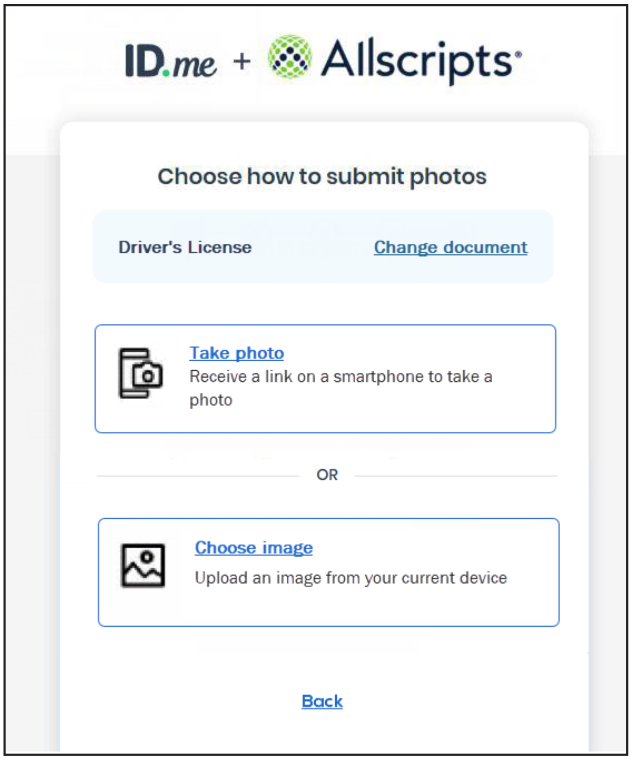
3. Complete the identity proofing steps:

   a. Under **Choose a verification method**, click 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**

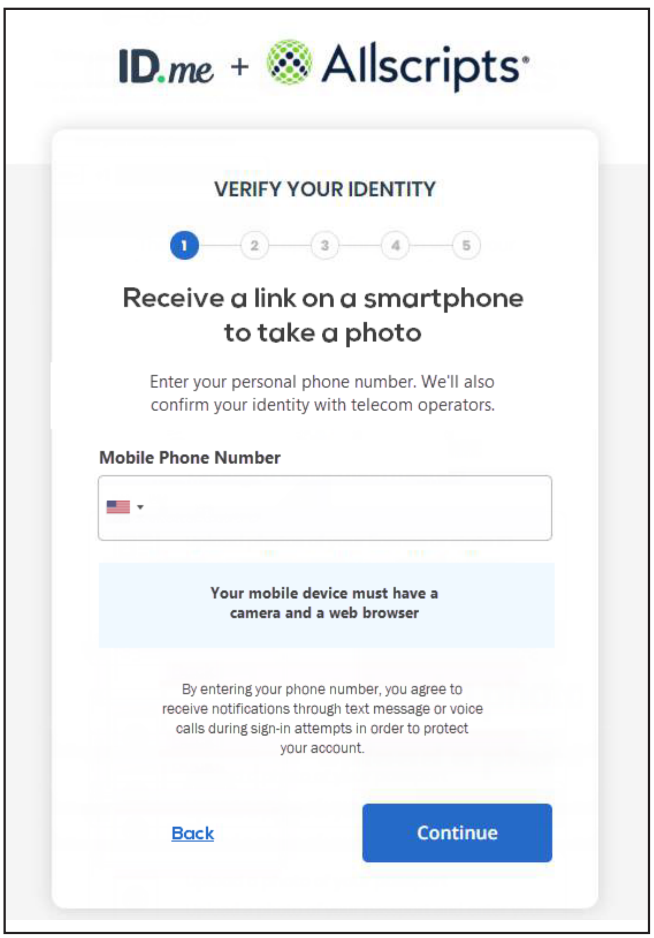
   b. If the **Biometric Information Privacy Statement** page opens, read the policy, select the check box to acknowledge that you understand, and then click **Continue**.

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



c. Click **Take photo**.

The **Receive a link on a smartphone to take a photo** options appear.

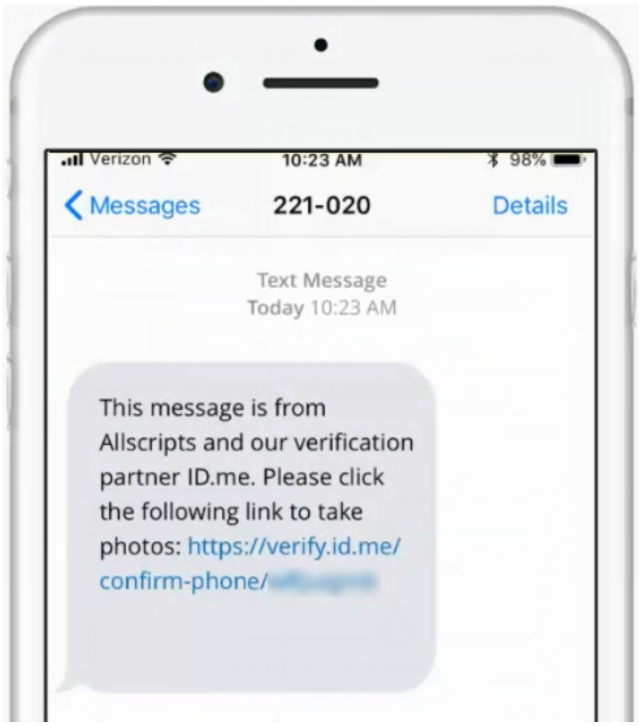


d. Enter your mobile phone number. The number must be registered to you under your full legal name, and the phone must be able to receive text messages.

e. Click **Continue**.

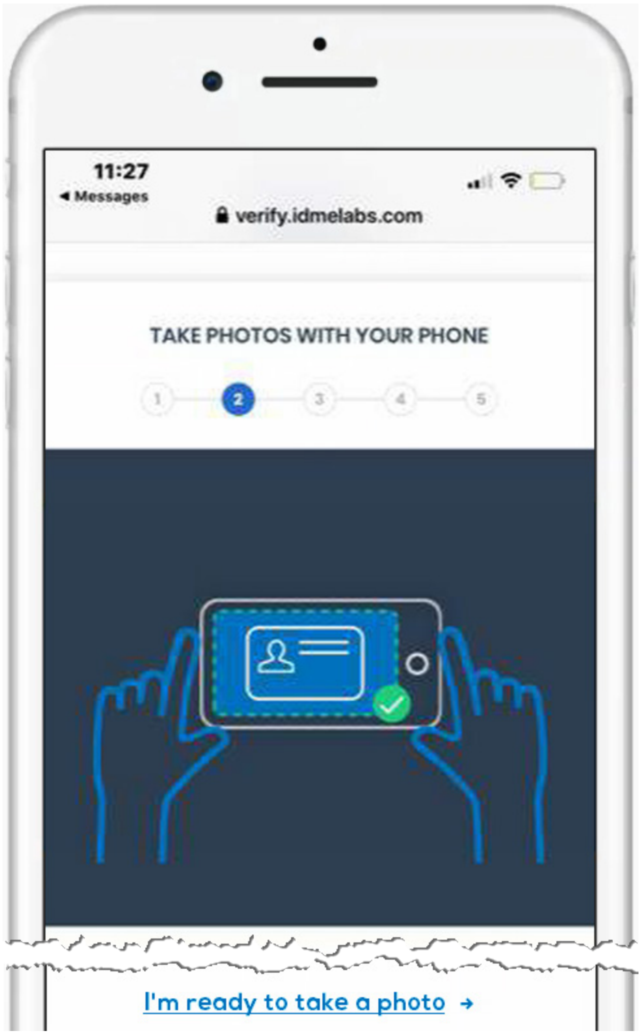
f. If a message regarding whether you control the email address for your ID.me account or not appears, click **Yes**.

You receive a text message from ID.me with a link to take photos of your license.



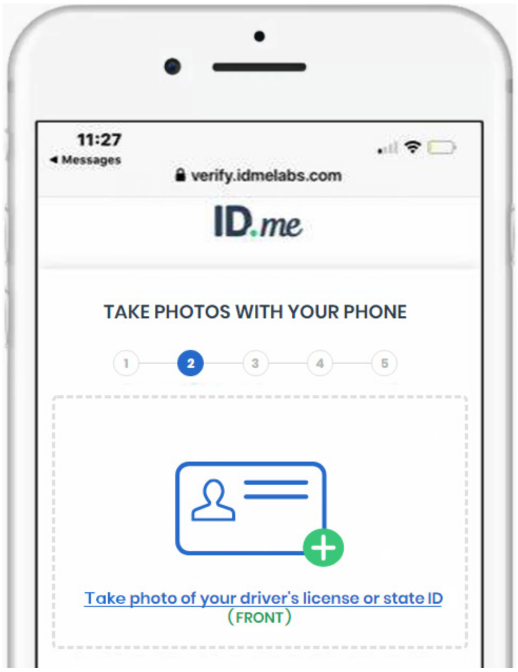
g. On your smart device, tap the link in the text message.

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



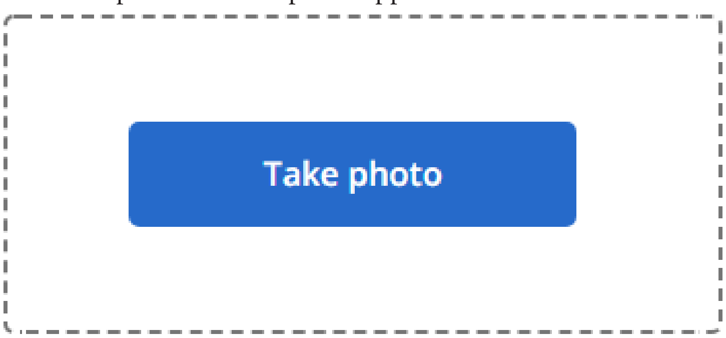
h. Tap **I'm ready to take a photo**.

The options for taking photos appear.



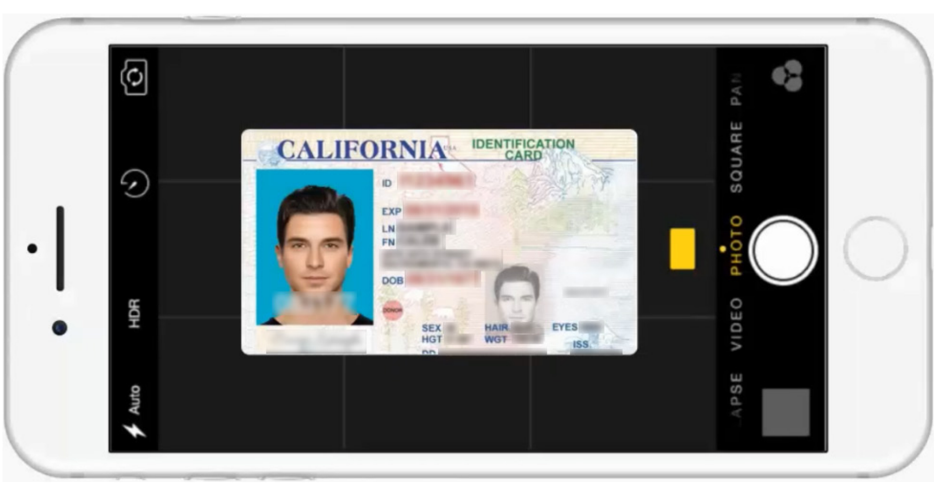
i. In the upper box, tap the **Take photo of your driver's license or state ID** link to take a photo of the front of your license.

The option to take a photo appears.

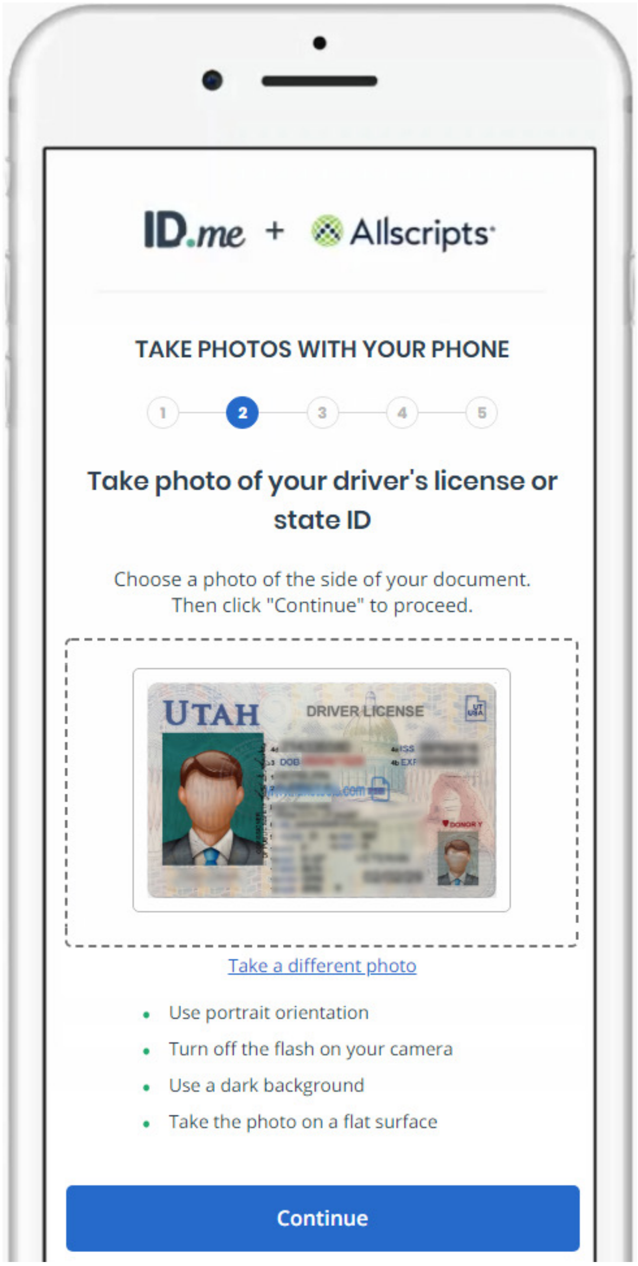


j. Tap **Take Photo**.

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

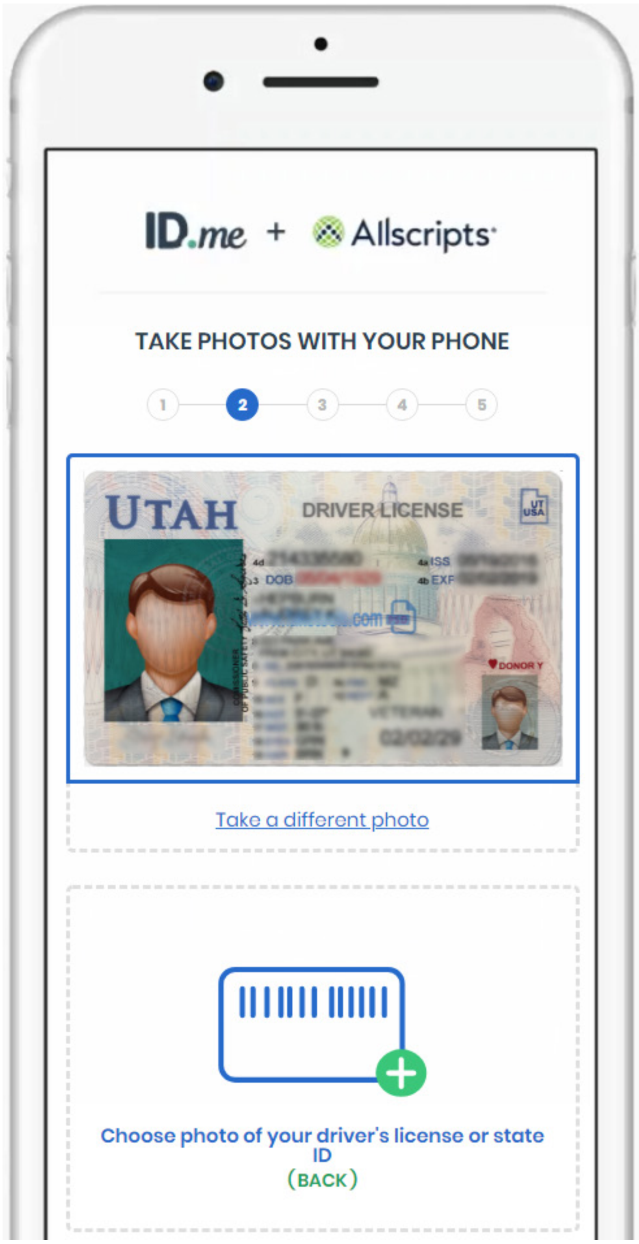


The resulting photo appears.



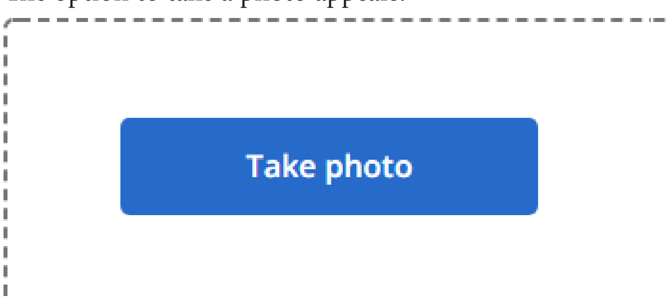
1. Tap **Continue**.

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** link to take a photo of the back of your license.

The option to take a photo appears.



n. Either tap **Take Photo**, or tap **Choose File** and then **Take Photo**.

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

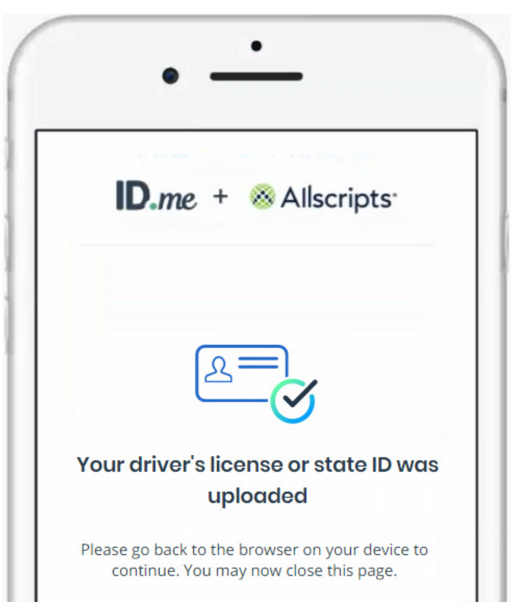
The resulting photo appears.

p. Tap **Continue**.

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

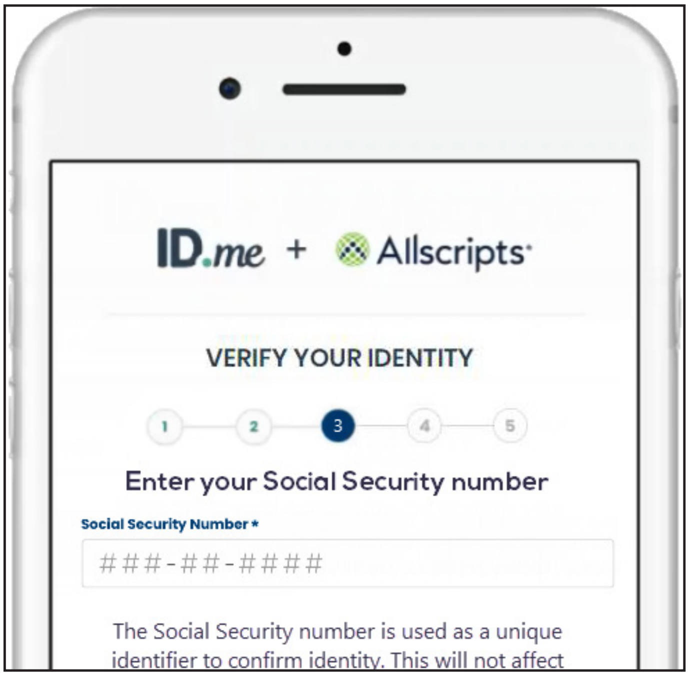
q. If the photos of your license are clearly displayed on your device, tap **Submit your photos** to upload the photos.

A message appears when the upload is complete.



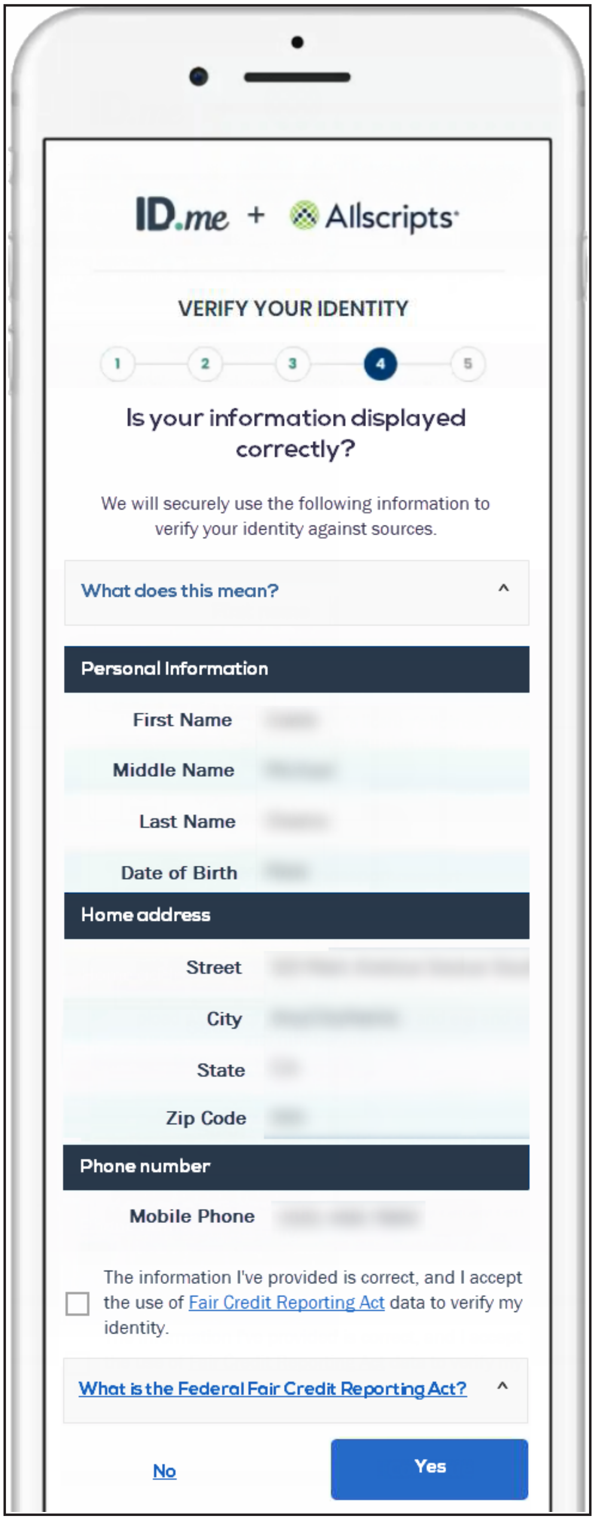
r. Return to the other open browser tab.

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



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

Your registration information appears.



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 **Authorize Allscripts Shield** page appears.

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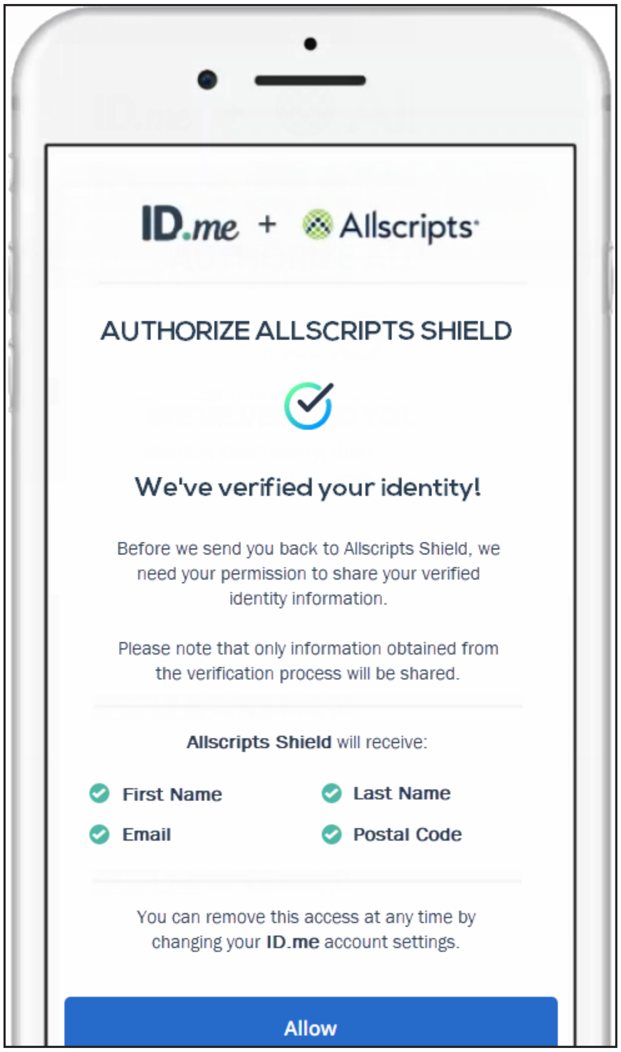
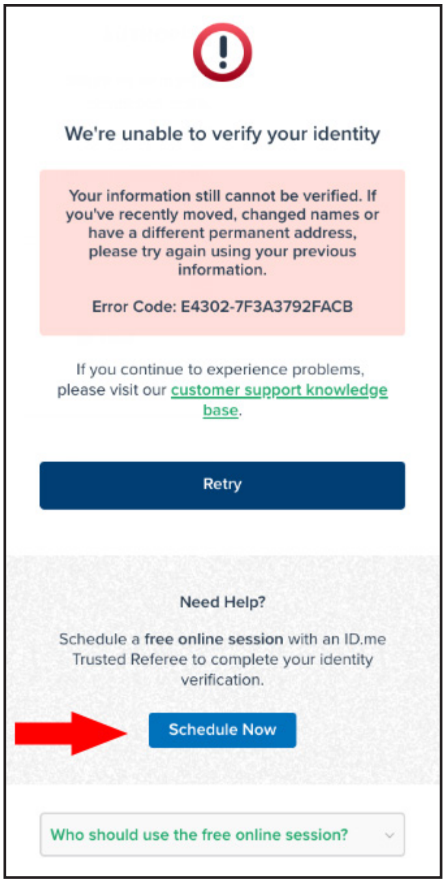


v. Click **Allow**.

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.

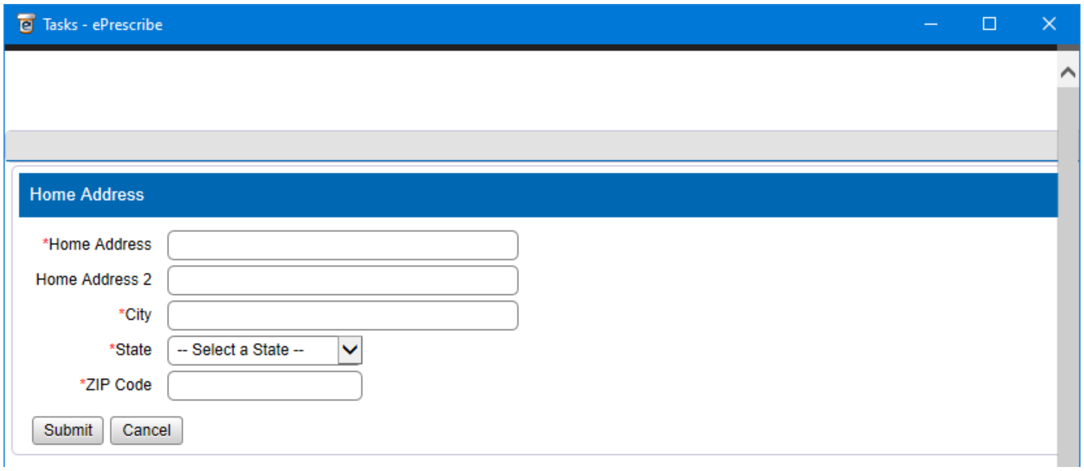
Finishing ePrescribe Setup

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.

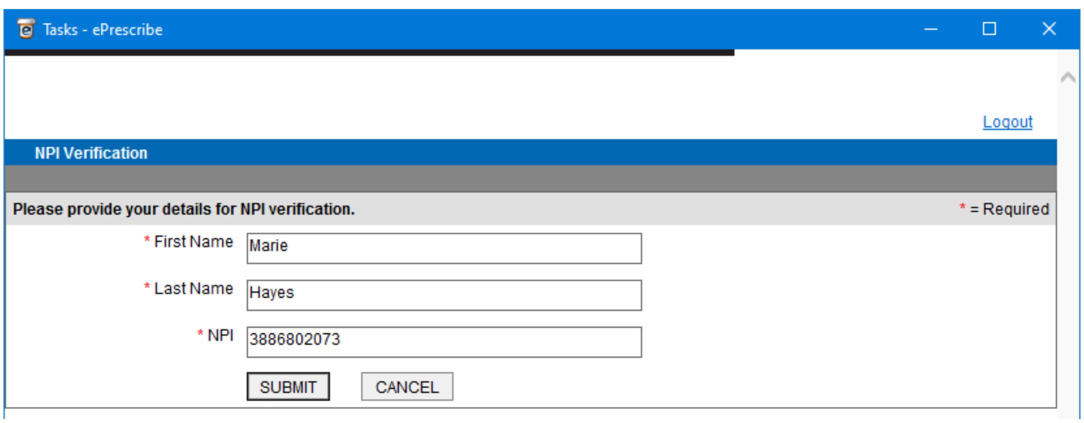
   Note: You will use the web address eprescribe.allscripts.com going forward to create prescriptions.

   The **Home Address** page appears.



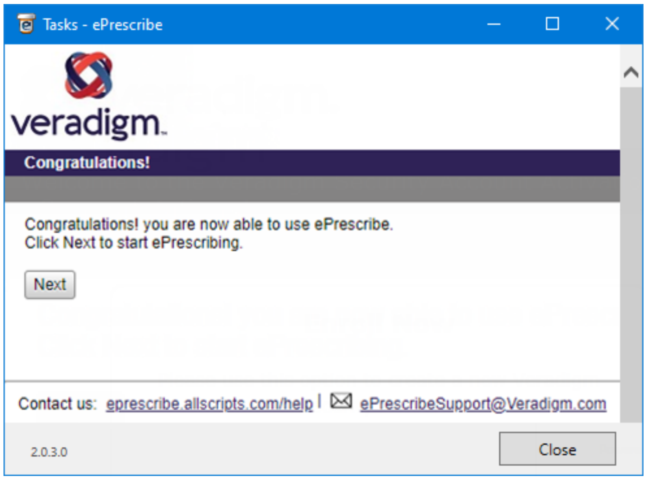
2. Enter your home street address, and then click **Submit**.

   The **NPI Verification** page appears.



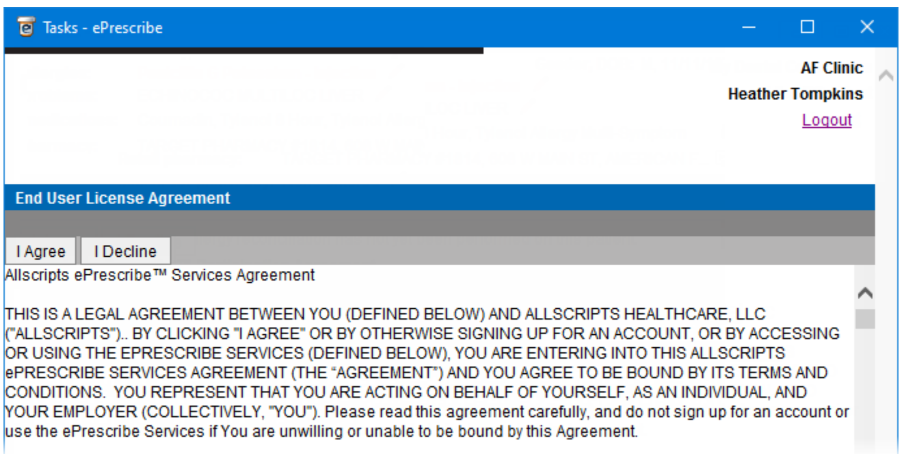
3. Verify that your name and NPI are correct, and then click **Submit**.

   The **Congratulations!** page appears.



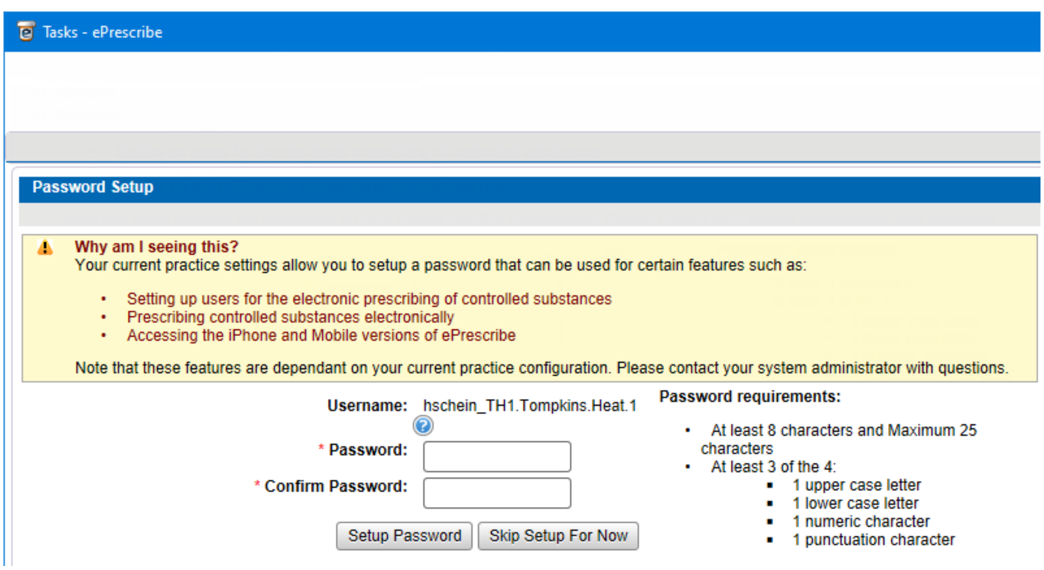
4. Click **Next**.

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



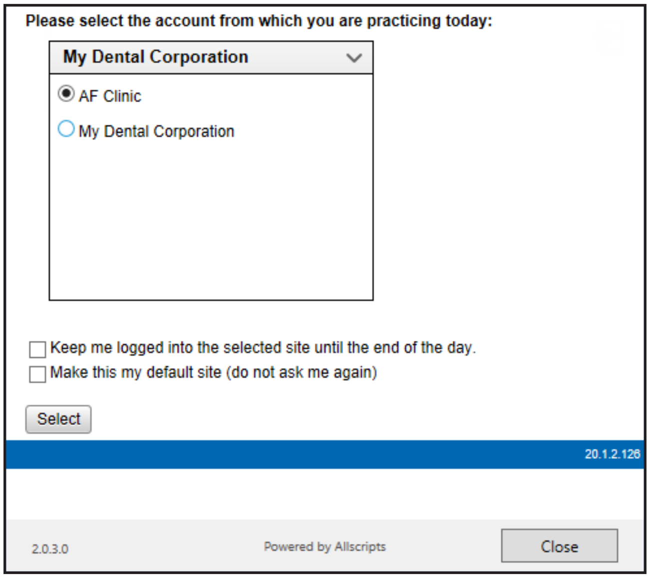
5. Review the agreement, and then click **I Agree**.

   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 (clinics) set up in ePrescribe (as explained in "Adding Sites in ePrescribe" on page 51), 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 Dentrix.

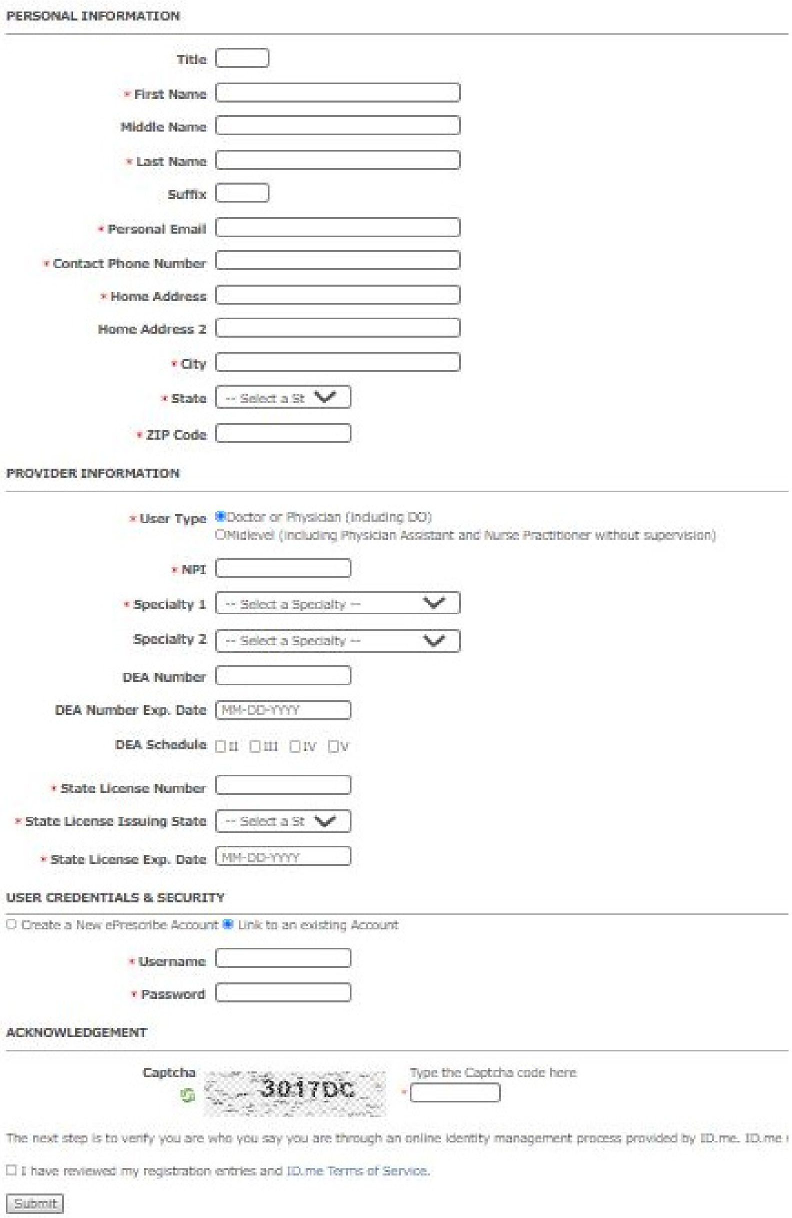
9. Click **Select**.

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.



PERSONAL INFORMATION

Title
* First Name
Middle Name
* Last Name
Suffix
* Personal Email
* Contact Phone Number
* Home Address
Home Address 2
* City
* State -- Select a St
* ZIP Code

PROVIDER INFORMATION

* User Type ◉Doctor or Physician (including DO)
○Midlevel (including Physician Assistant and Nurse Practitioner without supervision)
* NPI
* Specialty 1 -- Select a Specialty --
Specialty 2 -- Select a Specialty --
DEA Number
DEA Number Exp. Date MM-DD-YYYY
DEA Schedule ☐II ☐III ☐IV ☐V
* State License Number
* State License Issuing State -- Select a St
* State License Exp. Date MM-DD-YYYY

USER CREDENTIALS & SECURITY

○ Create a New ePrescribe Account ◉ Link to an existing Account
* Username
* Password

ACKNOWLEDGEMENT

Captcha 3017DC Type the Captcha code here

The next step is to verify you are who you say you are through an online identity management process provided by ID.me. ID.me

☐ I have reviewed my registration entries and ID.me Terms of Service.

Submit

2. Under **User Credentials & Security**, click the **Create a New ePrescribe Account Link to an existing Accout** link.


PROVIDER INFORMATION

* User Type ◉ Doctor or Physician (including DO)
○ Midlevel (including Physician Assistant and Nurse Practitioner without supervision)

* NPI

* Specialty 1 -- Select a Specialty --

Specialty 2 -- Select a Specialty --

DEA Number

DEA Number Exp. Date MM-DD-YYYY

DEA Schedule ☐ II ☐ III ☐ IV ☐ V

* State License Number

* State License Issuing State -- Select a State

* State License Exp. Date MM-DD-YYYY

USER CREDENTIALS & SECURITY

◉ Create a New ePrescribe Account ○ Link to an existing Account

* Username

* Password

* Confirm Password

Rules Must have between 8 (min) and 25 (max) characters and any three of the following:
- One (1) upper case character
- One (1) lower case character
- One (1) special character
- One (1) number

Select Security Questions / Provide Answers

What was your childhood nickname? *

In what city did you meet your spouse/significant other? *

What is the name of your favorite childhood pet? *

ACKNOWLEDGEMENT

Captcha CE21AB Type the Captcha code here *

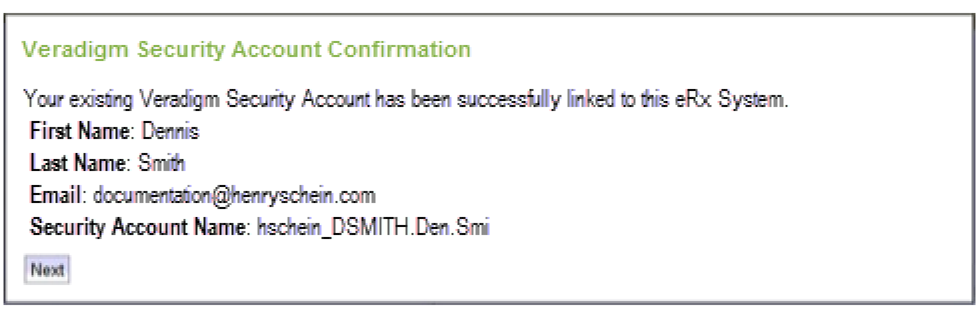
The next step is to verify you are who you say you are through an online identity management process provided by ID.me. ID.me will ask you to provide i
Submit.

☐ I have reviewed my registration entries and ID.me Terms of Service.

Submit

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

   A confirmation message that contains some basic account information appears.


Veradigm Security Account Confirmation

Your existing Veradigm Security Account has been successfully linked to this eRx System.

First Name: Dennis

Last Name: Smith

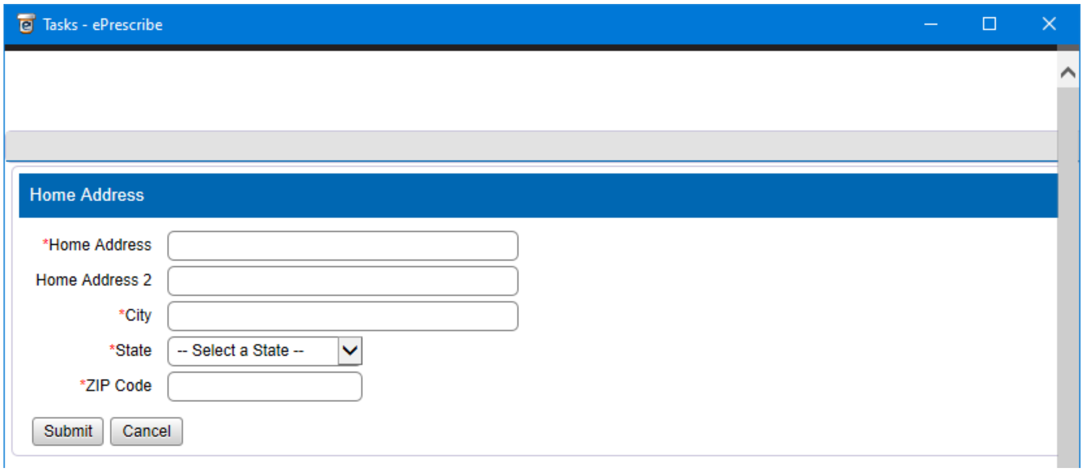
Email: documentation@henryschein.com

Security Account Name: hschein_DSMITH.Den.Smi

Next

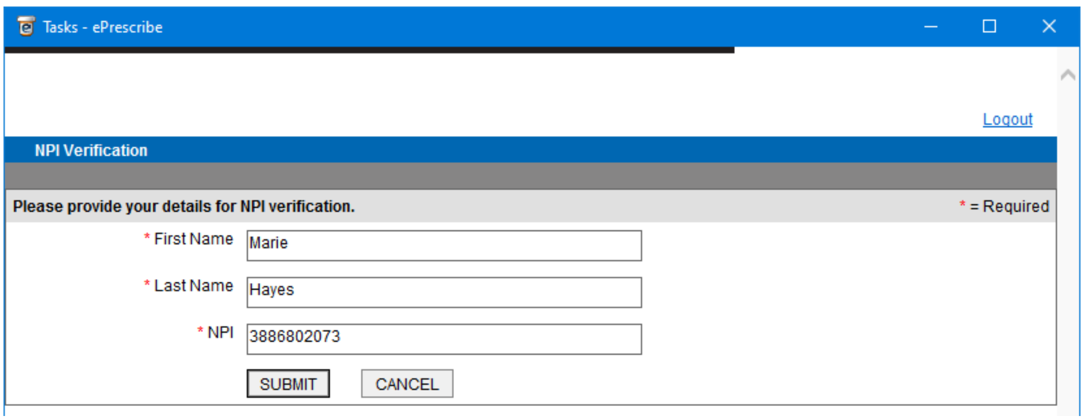
5. Click **Next**.

   The **Home Address** page appears.



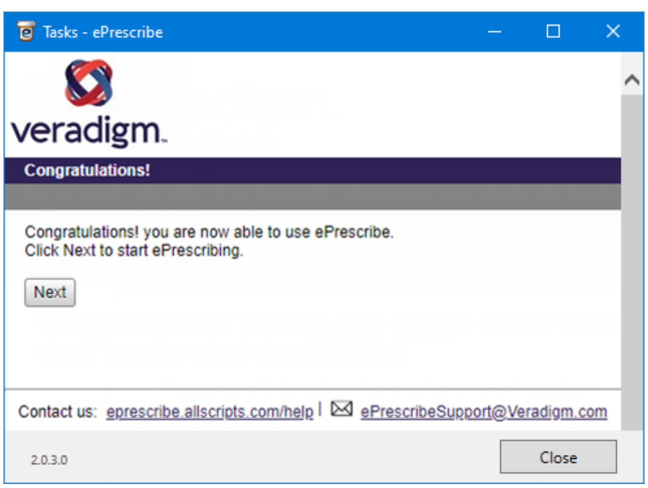
6. Enter your home street address, and then click **Submit**.

   The **NPI Verification** page appears.



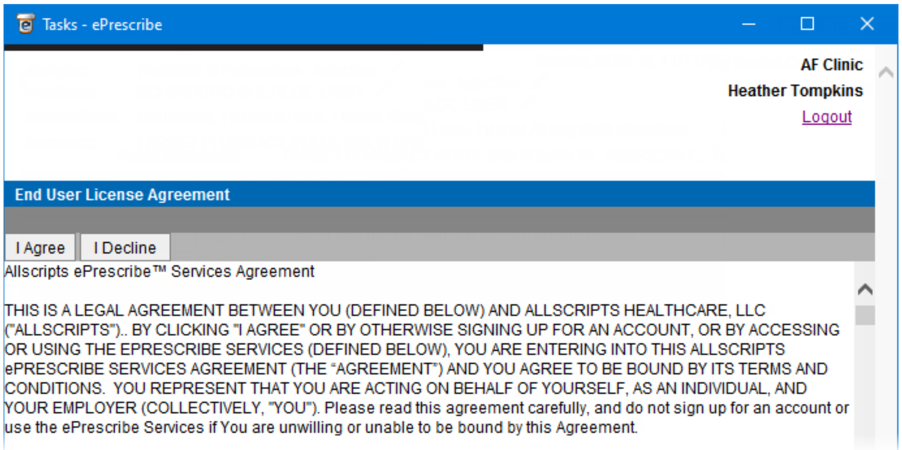
7. Verify that your name and NPI are correct, and then click **Submit**.

   The **Congratulations!** page appears.



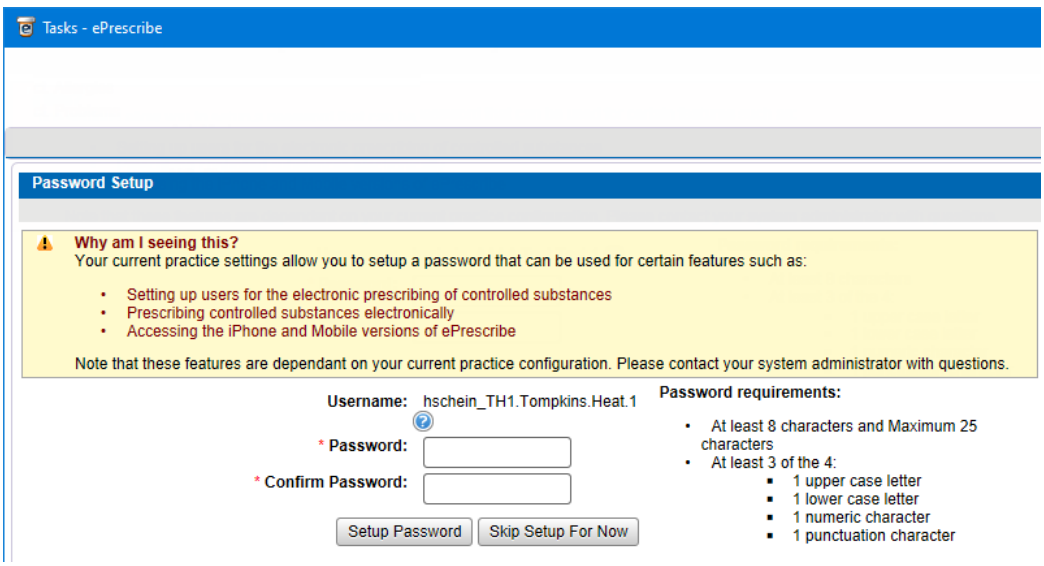
8. Click **Next**.

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



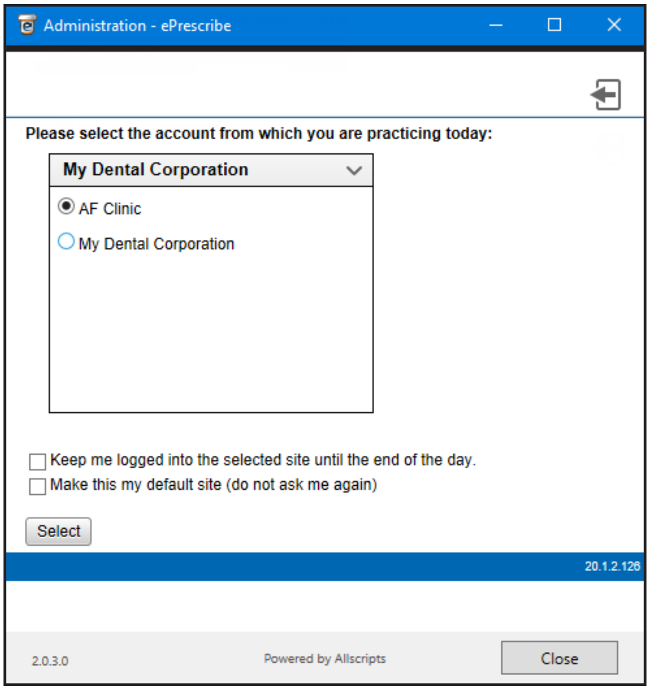
9 Review the agreement, and then click I Agree.

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 (clinics) set up in ePrescribe (as explained in "Adding Sites in ePrescribe" on page 51), 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 ePrescribe.

13. Click **Select**.
14. The Admin grants EPCS privileges to the provider. For more information, see "Step 1 — To turn on EPCS (Admin)" on page 38 (for multiple providers) or "Step 1 — To turn on EPCS" on page 36 (for a one provider).
15. The Admin sets up the provider as an Approver. For more information, see "Step 3 (Admin) — To set up the Approver" on page 39 (for multiple providers) or "Step 3 — To set up approval" on page 36 (for one provider). If there are already two Approvers, you can skip this step.
16. An Approver approves the EPCS signing privilege for the provider. For more information, see "Step 4 (Approver) — To approve Providers" on page 40 (for multiple providers) or "Step 4 — To approve" on page 37 (for one provider).

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

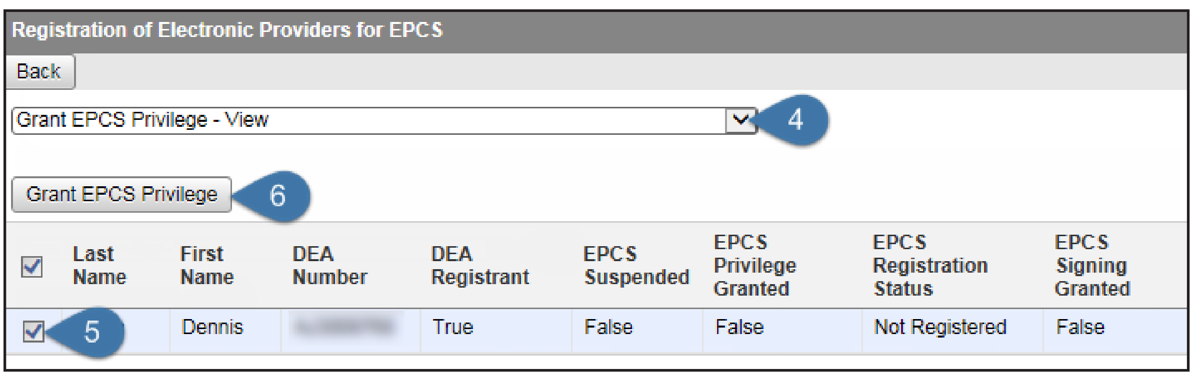
One Provider

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 the ePrescribe website as the Admin.
2. Click the **Settings** tab.
3. Click the **Manage EPCS** link.

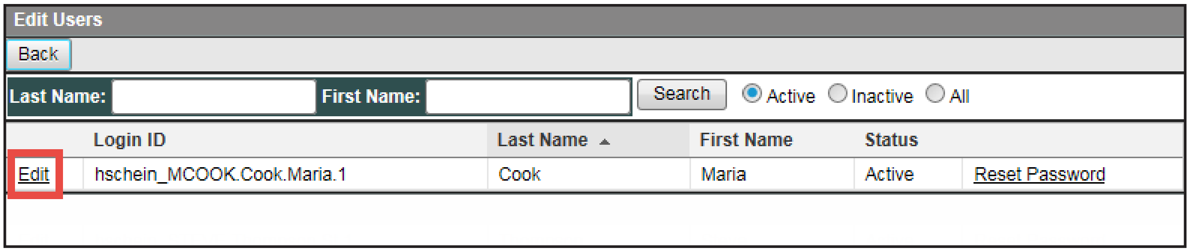


4. From the list at the top, select **Grant EPCS Privilege - View**.
5. Select the check box next to your name.
6. Click **Grant EPCS Privilege**.
7. Close ePrescribe to log out.

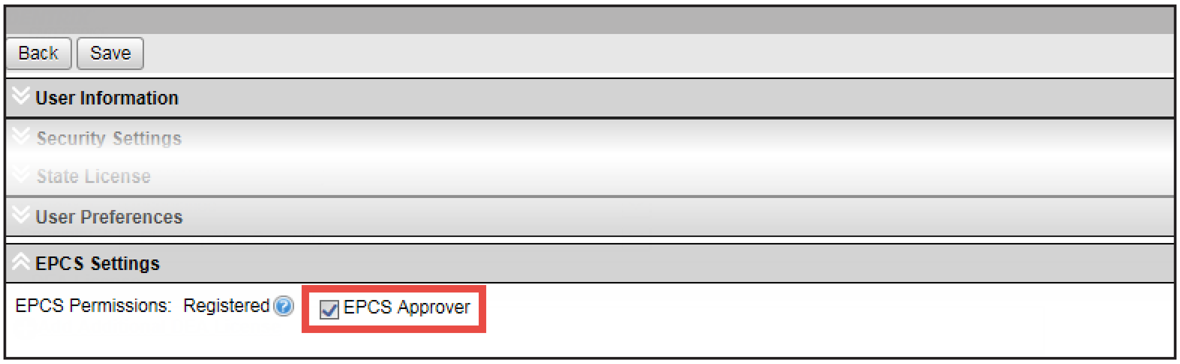
Step 2 — To set up approval

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

1. Log in to the ePrescribe website as the Admin.
2. Click the **Settings** tab.
3. Click the **Edit Users** link.



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



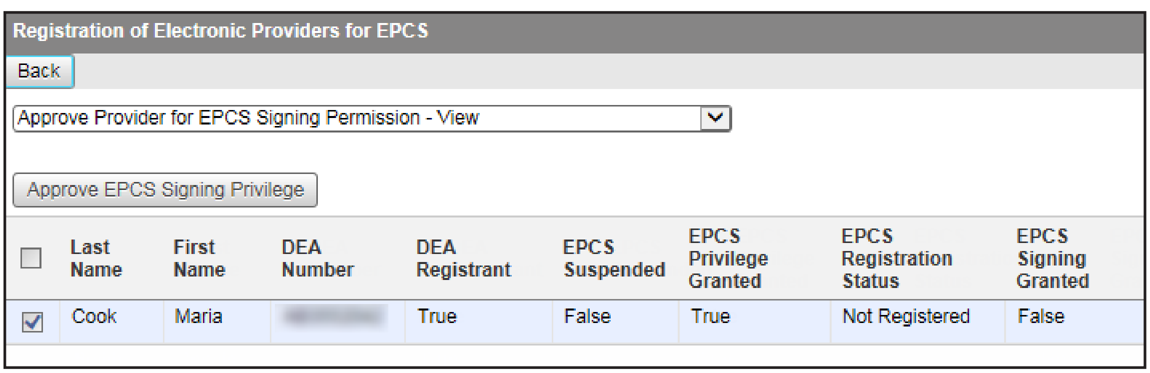
5. Scroll to the bottom. Under **EPCS Settings**, select the **EPCS Approver** check box.
6. Scroll back to the top, and click **Save**.
7. Close ePrescribe to log out.

Step 3 — To approve

After setting up the approval permission, do the following:

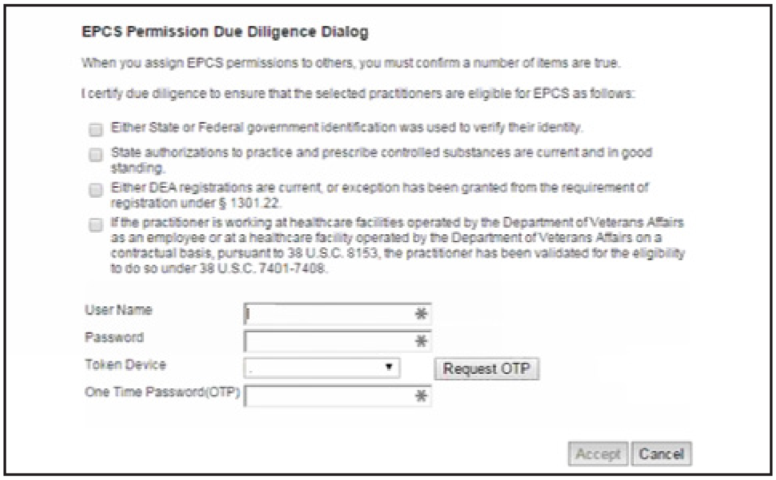
1. Open ePrescribe as explained in "Opening ePrescribe" in the Usage chapter.
2. On the right, under **Urgent Message**, click the **Manage EPCS Approvals** link.

   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

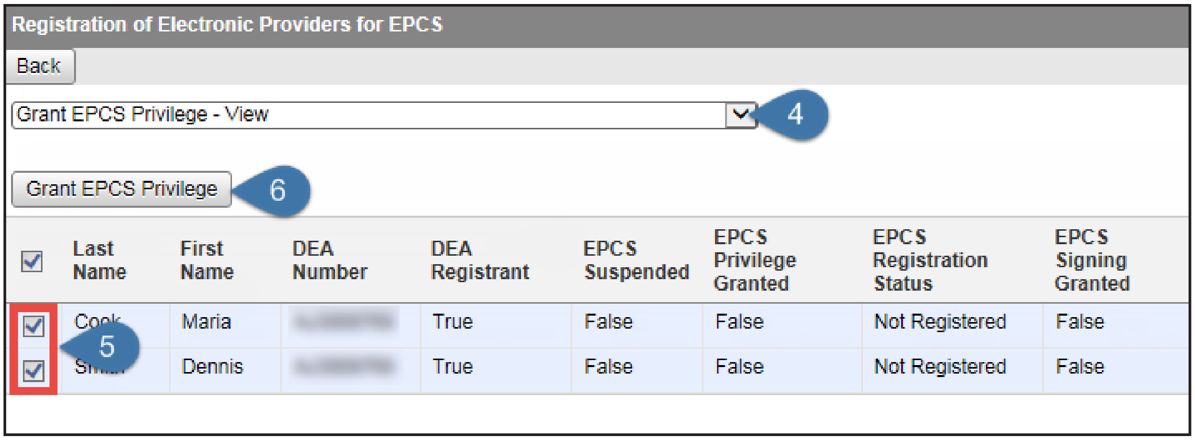
If you have multiple providers who use ePrescribe to prescribe controlled substances, the following three individuals are required to complete the EPCS registration (two of the three must be DEA registrants):

- **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 the ePrescribe website as the Admin.
2. Click the **Settings** tab.
3. Click the **Manage EPCS** link.

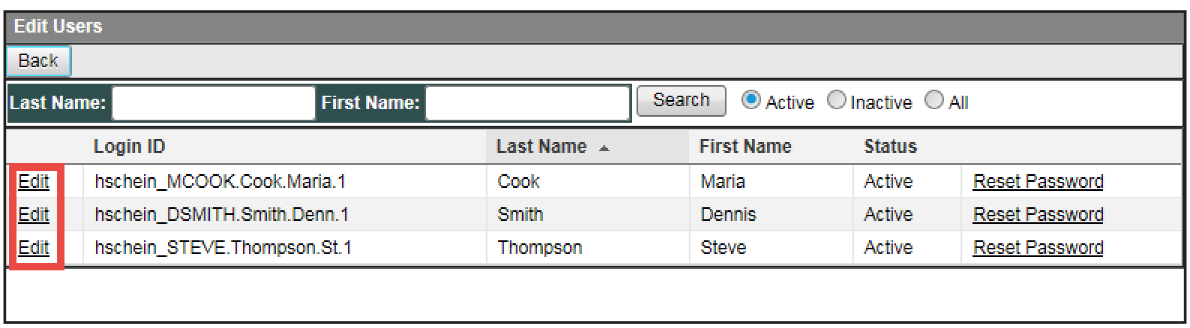


4. From the list at the top, select **Grant EPCS Privilege - View**.
5. Select the check boxes next to the Providers to whom you are granting EPCS privileges.
6. Click **Grant EPCS Privilege**.
7. Close ePrescribe to log out. The Providers (from step 5) must also log out of ePrescribe.

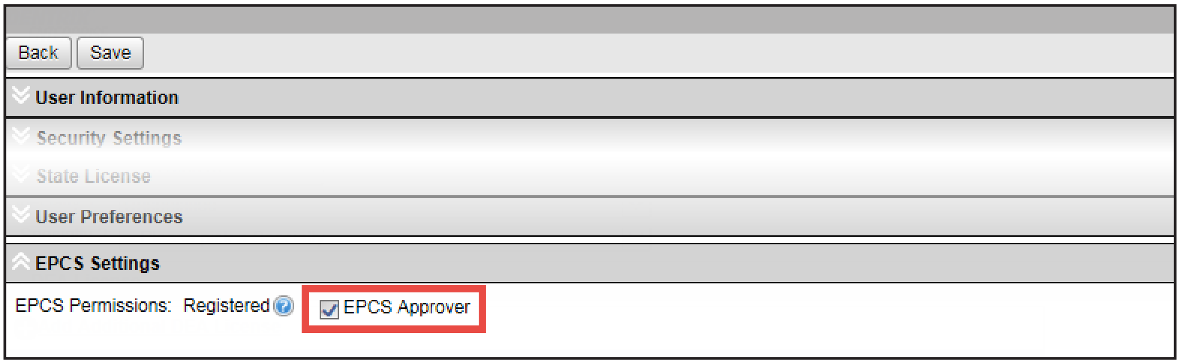
Step 2 (Admin) — To set up the Approver

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

1. Log in to the ePrescribe website as the Admin.
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.



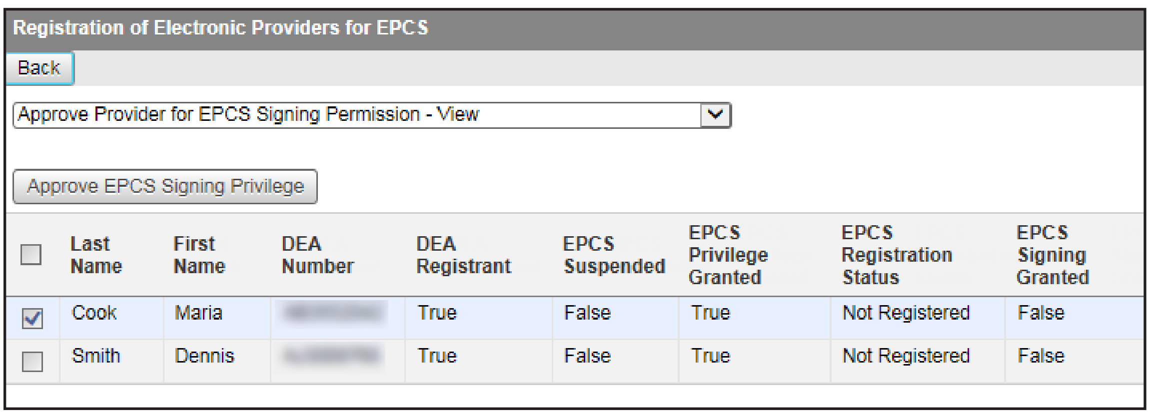
5. Scroll to the bottom. Under **EPCS Settings**, select the **EPCS Approver** check box.
6. Scroll back to the top, and click **Save**.
7. Close ePrescribe to log out.

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:

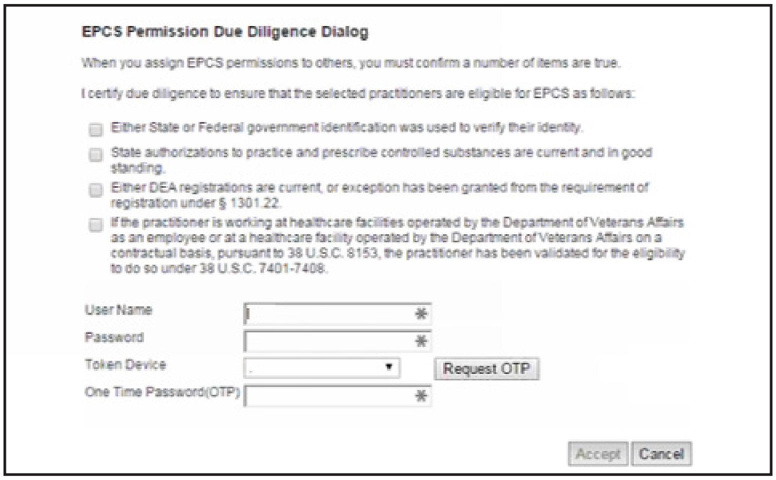
1. Open ePrescribe as explained in "Opening ePrescribe" in the Usage chapter.
2. On the right, under **Urgent Message**, click the **Manage EPCS Approvals** link.

   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. 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

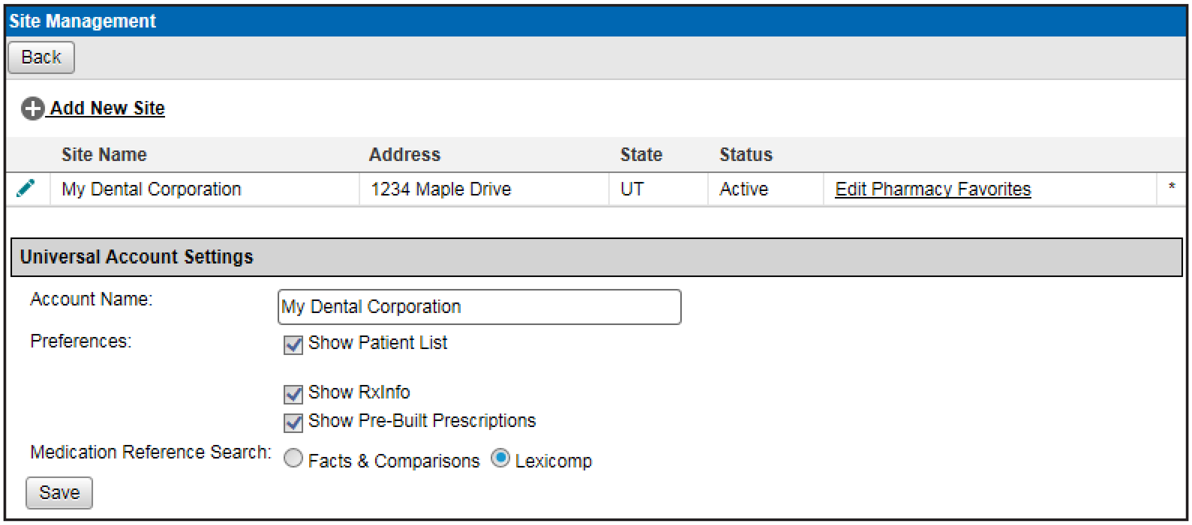
For each site that you join to an existing group, you must add that site from ePrescribe. A stand-alone site or the primary site of a group that you enable for ePrescribe is added automatically as a site in ePrescribe.

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

To add a site in ePrescribe

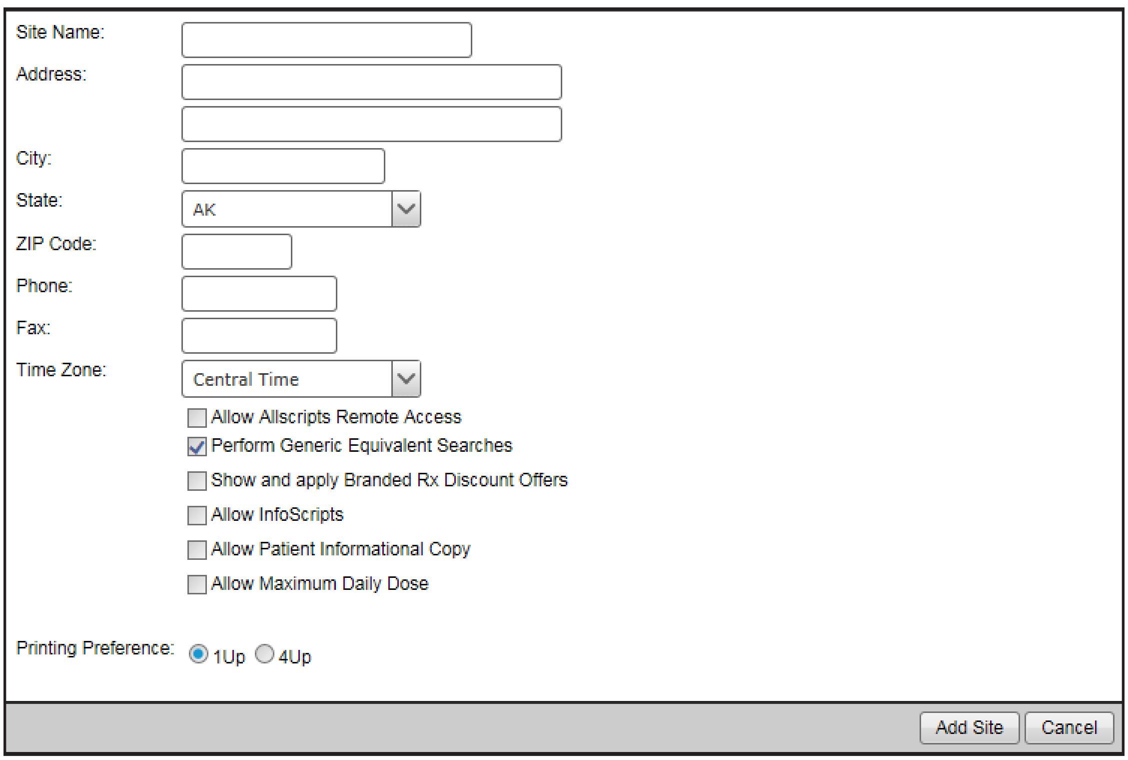
1. Log in to the ePrescribe website as the Admin.
2. Click the **Settings** tab.
3. Click the **Site Management** link.

   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:

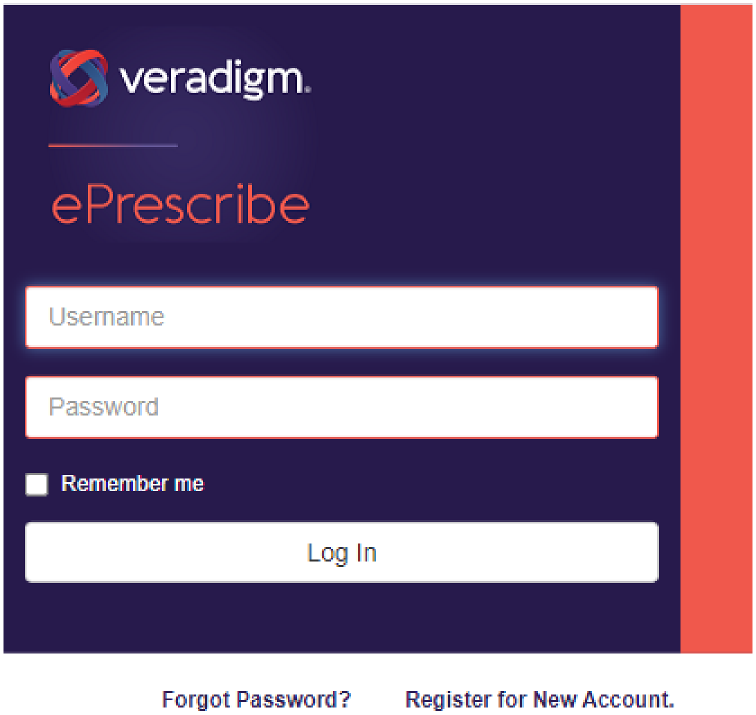
- Opening ePrescribe
- Adding and Editing Patients
- Adding and Editing Allergies
- Adding and Editing Problems
- Entering New Prescriptions

Opening ePrescribe

You can open ePrescribe in your web browser.

To open ePrescribe

1. From your web browser, go to ePrescribe.allscripts.com.



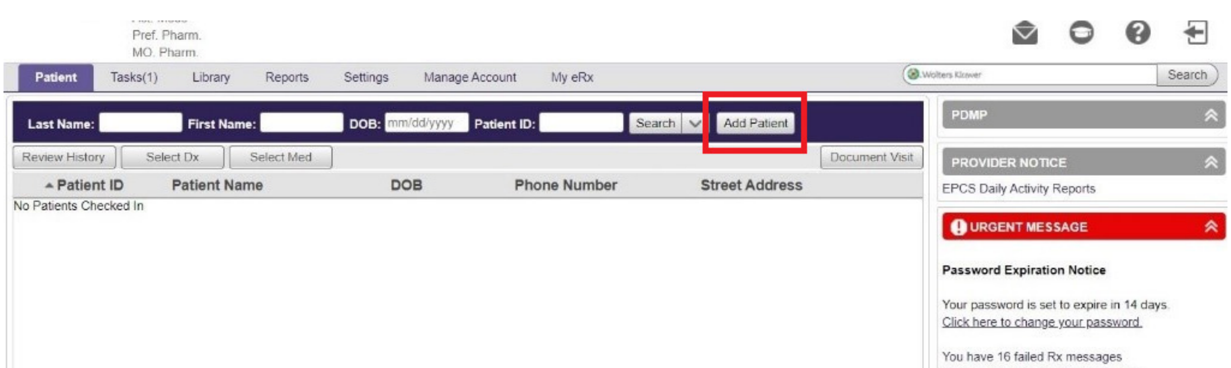
2. Type your username and password in the boxes provided.
3. Click **Log In**.

Adding and Editing Patients

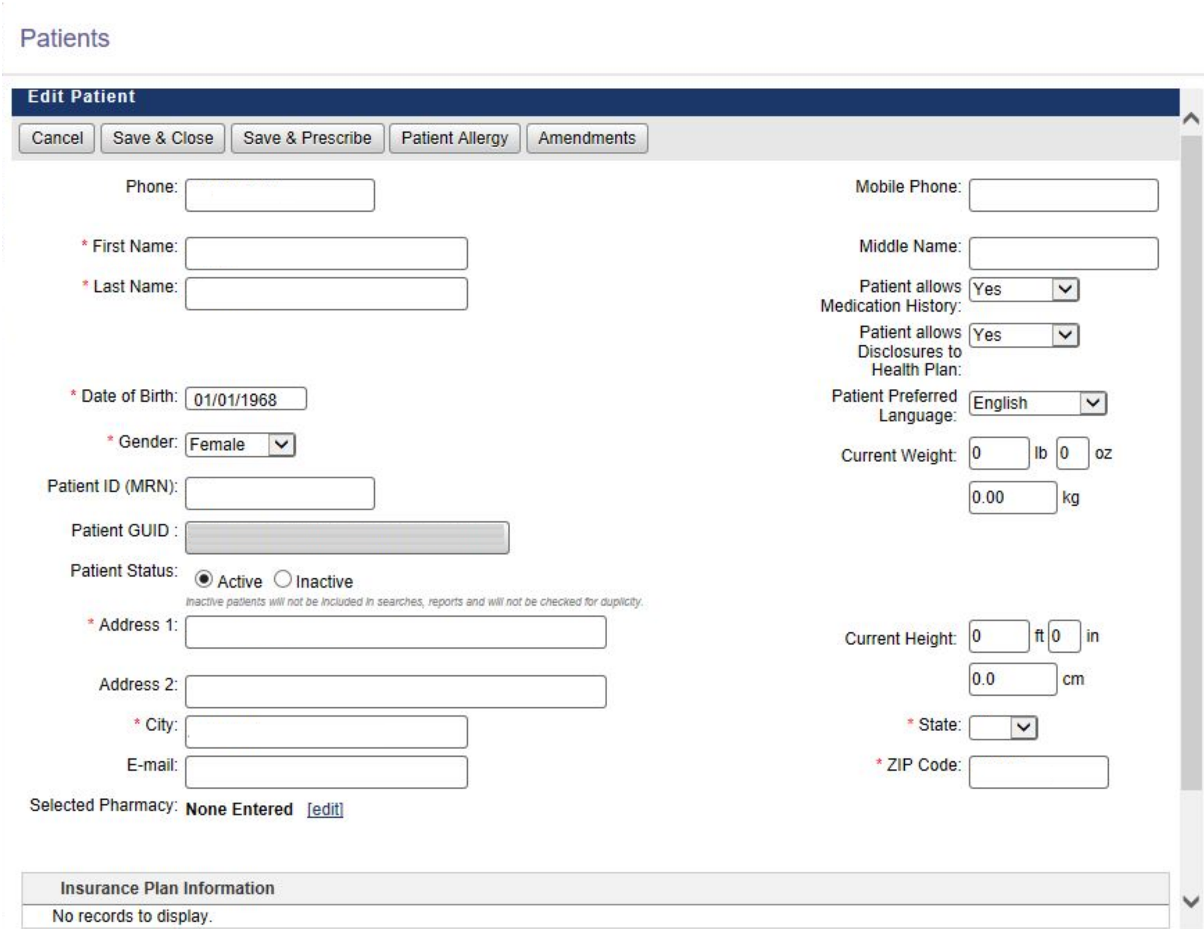
You can add and edit patient demographic information in ePrescribe.

To add a patient

1. With the ePrescribe module open, from the home screen, click **Add Patient**.



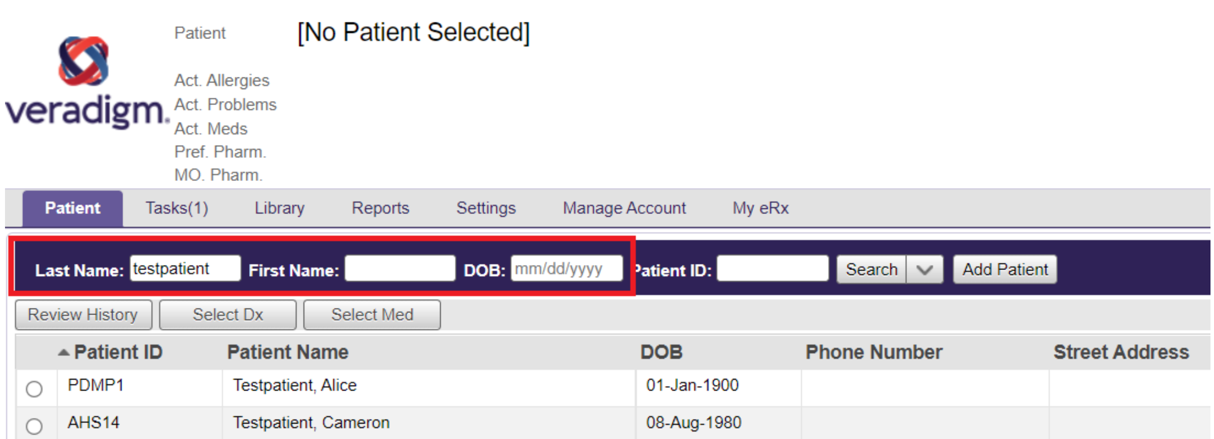
2. On the **Edit Patient** screen, fill in the patient information in the boxes provided.



3. Click **Insurance Plan Information** at the bottom, and fill in the insurance plan information.
4. 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.

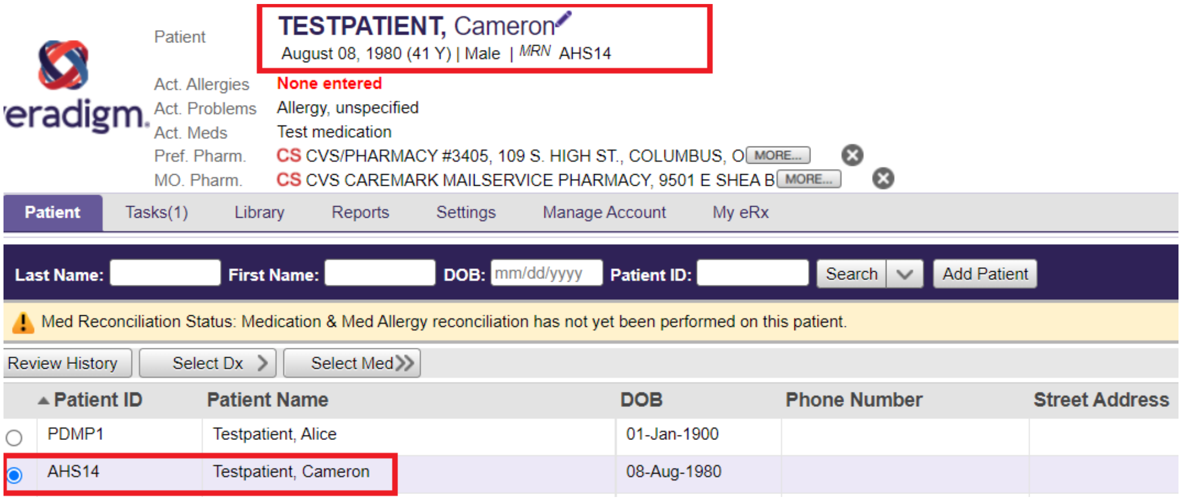
To edit a patient

1. With the ePrescribe module open, from the home screen, search for a patient by name (last, first) or date of birth.

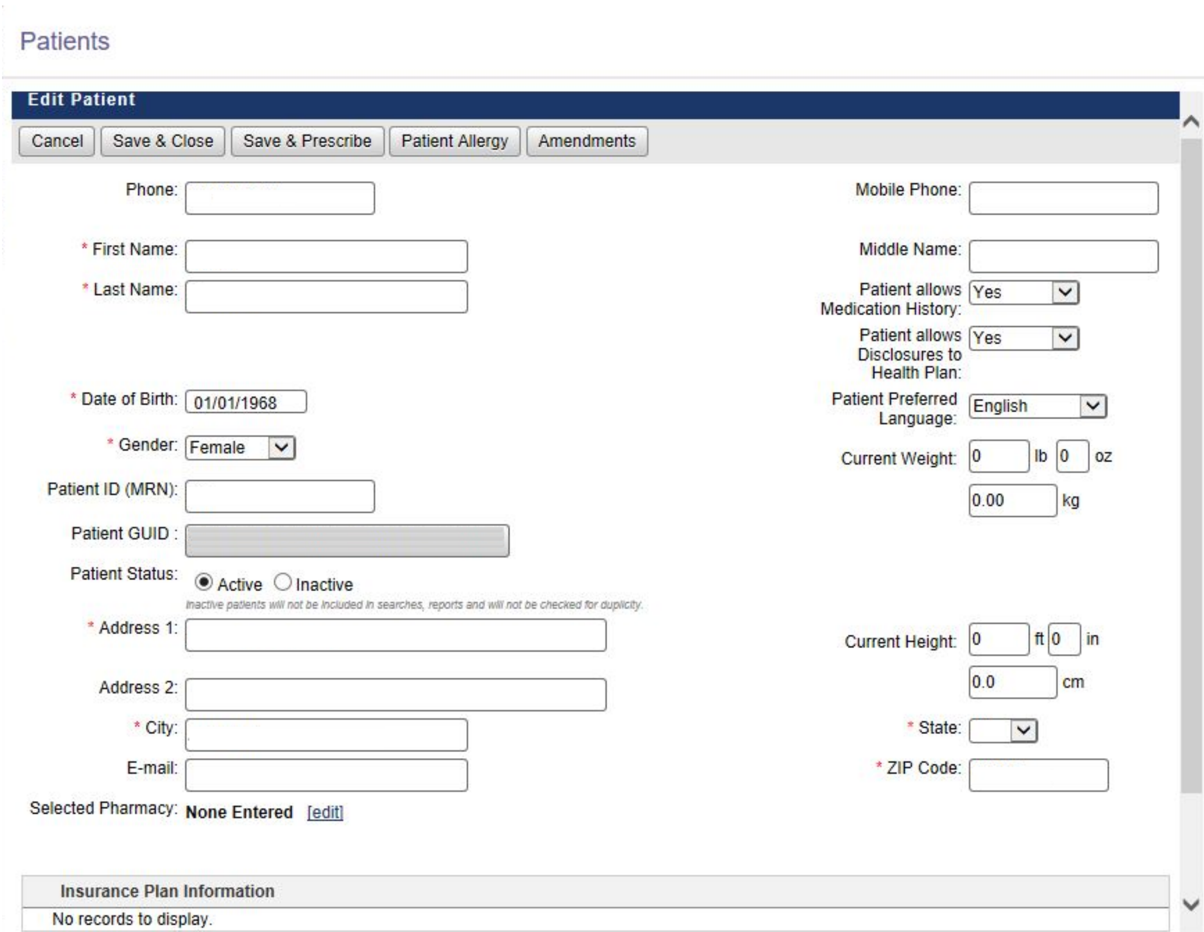


2. Select the patient.

   The patient's name appears at the top of the home screen.



3. Click on the pencil icon to open the patient profile and edit the information as needed.



4. 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.

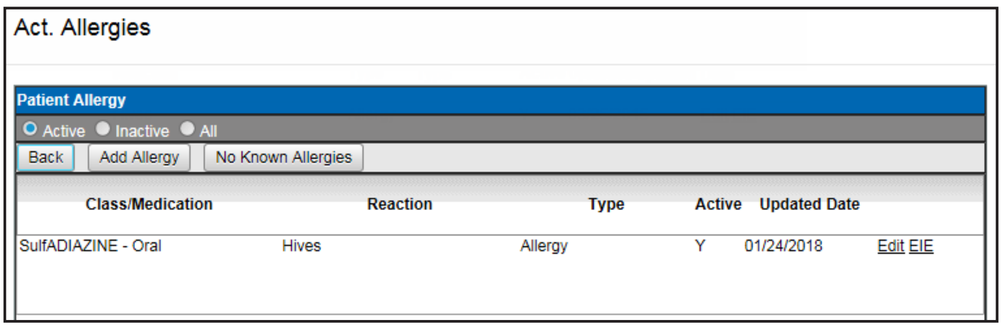
Adding and Editing Allergies

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.

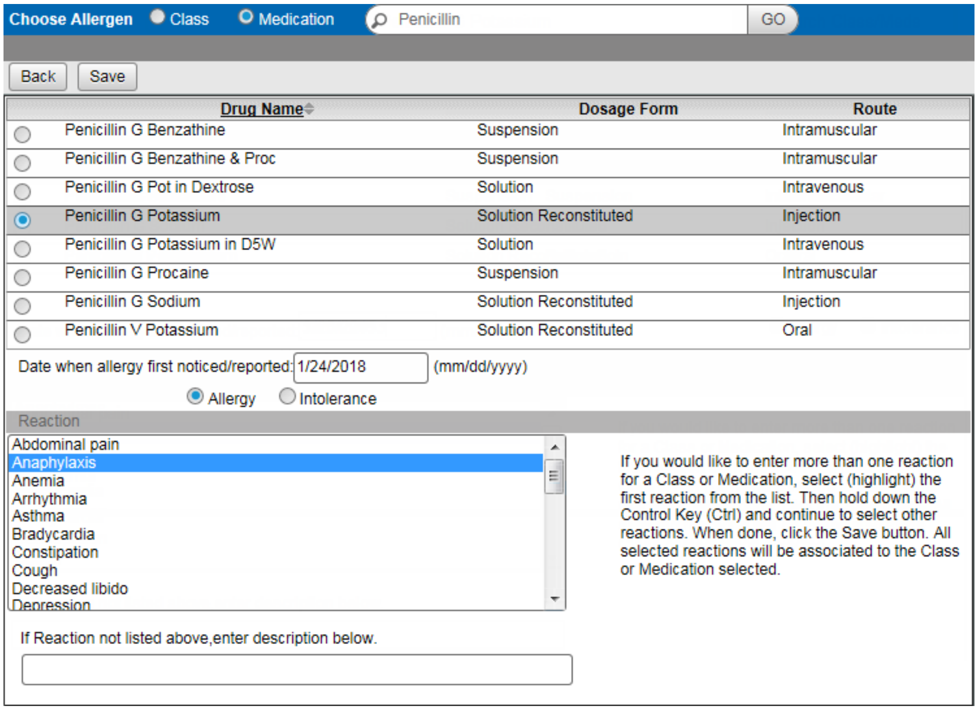


2. Add or edit an allergy, specify that there are no known allergies, or specify that an allergy was entered in error (EIE):

   - **Add**

     a. Click **Add Allergy**.

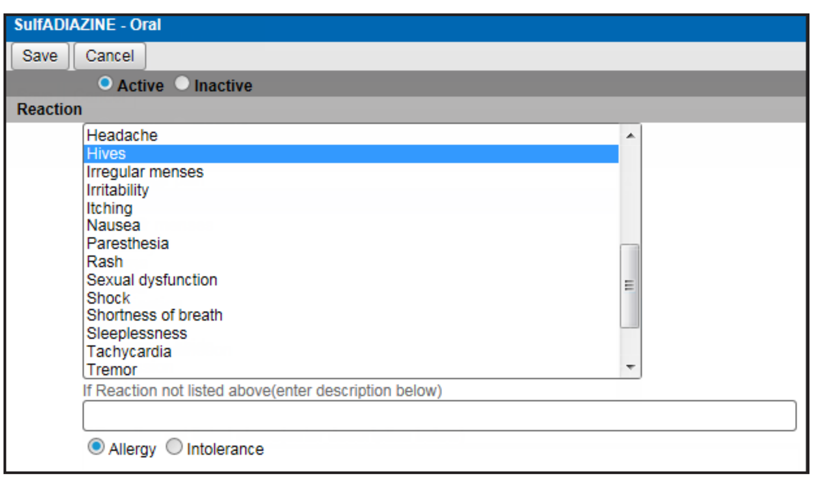
        The search options appear.



- **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.

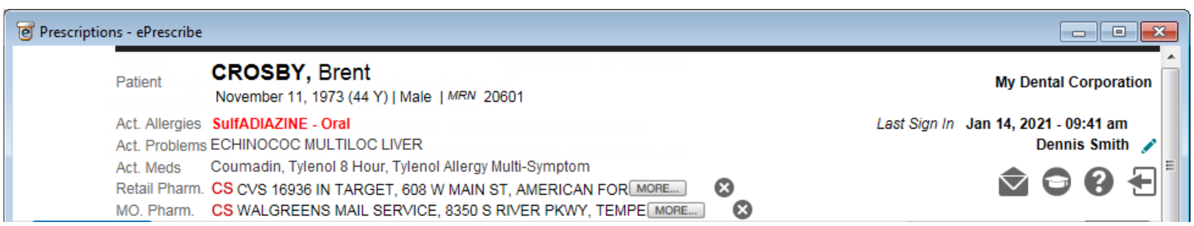
3. Click **Back** to close the **Act. Allergies** dialog box.

Adding and Editing Problems

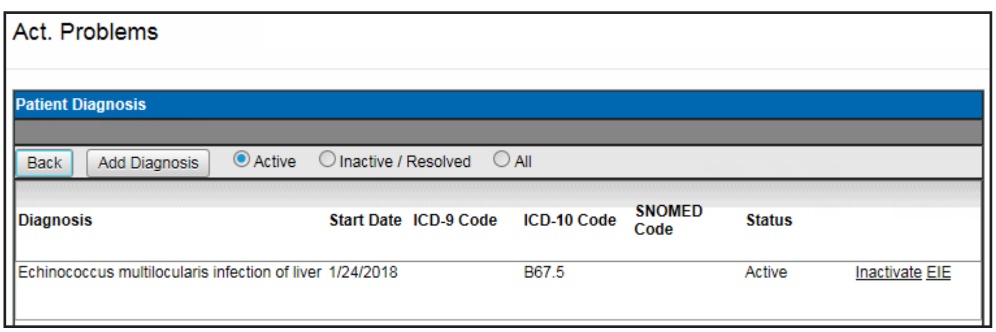
You can add and edit problems for a patient in ePrescribe.

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..

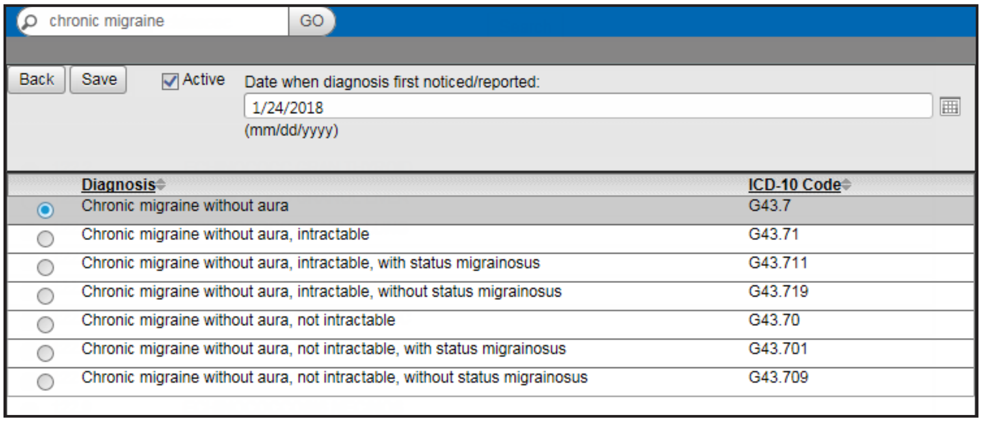


2. Add or inactivate a problem, or specify that a problem was entered in error (EIE):

- **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**.

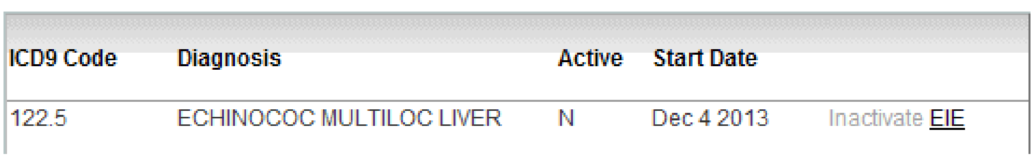
  f. Click **Save**.

  g. Repeat steps a–f as needed.

- **Inactivate**

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

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



  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.

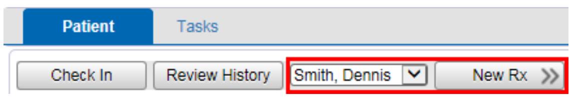
Entering New Prescriptions

You can enter a new prescription into ePrescribe.

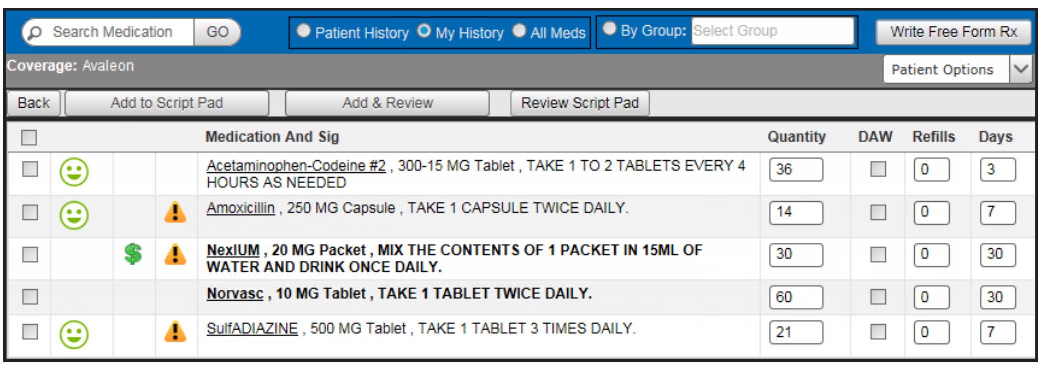
To enter a new prescription

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.

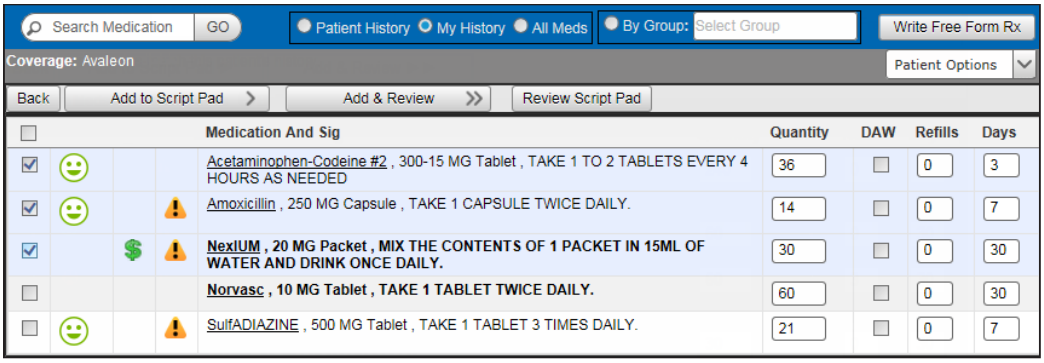
   

   Notes:
   - The green, yellow, and red faces represent formulary indicators, which are based on the patient's insurance plan:
     - The green face indicates a preferred status.
     - The yellow face indicates an approved status.
     - The red face is indicates an unapproved status.

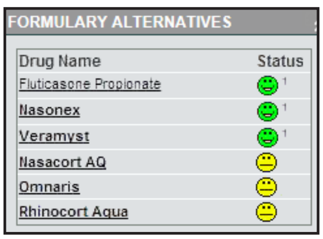
     Additionally, the number next to the faces represents levels of preference within a formulary.
   - A yellow triangle represents a pre-emptive drug utilization review (DUR) warning:
     - Drug to drug interactions
     - Adverse reactions
     - Dosage checks
     - Duplicate therapies

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.

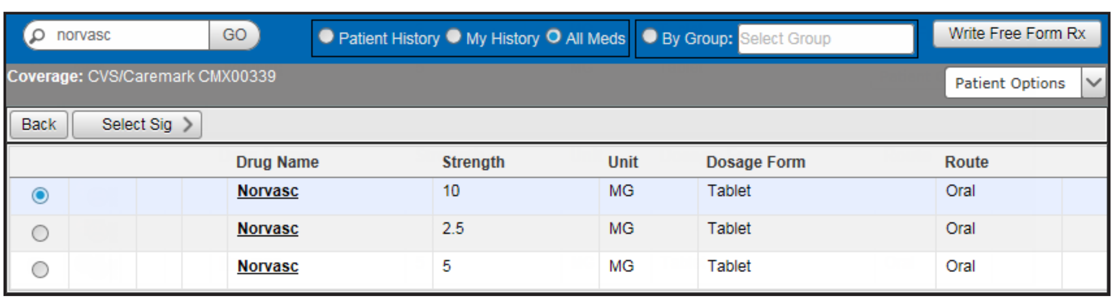
3. Do one of the following:
   - If you are using the **Patient History** or **My History** search option, do the following:
     a. Select the check boxes of the desired prescriptions. Only complete prescriptions are available for selection.



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.

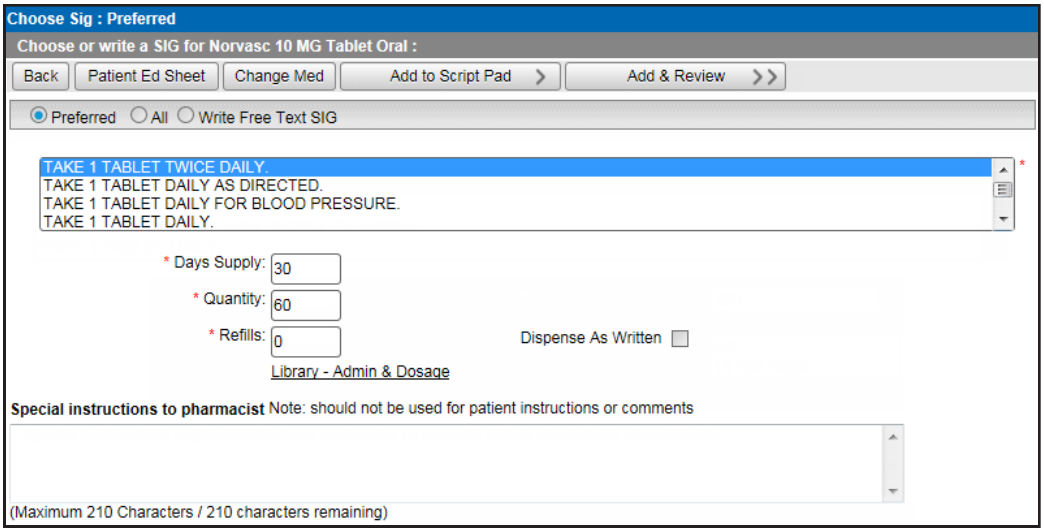


     b. To the right of any medication name, you can change the **Quantity**, **DAW**, **Refills**, and/or **Days** as needed.
   - If you are using the **All Meds** search option, do the following:
     a. Type a medication name in the **Search Medication** search field, and then click **GO**.



     b. Select the desired medication.
     c. Click **Select Sig >**.

The **Choose SIG** page opens.



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

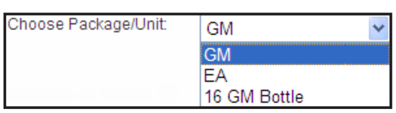
- **Preferred** – Displays a list of the common ways of prescribing this medication.
- **All** – Provides every generic option of prescribing a medication.
- **Write Free Text SIG** – Allows you to write complex directions or to write a sig that cannot be found for **Preferred** or **All**.

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.



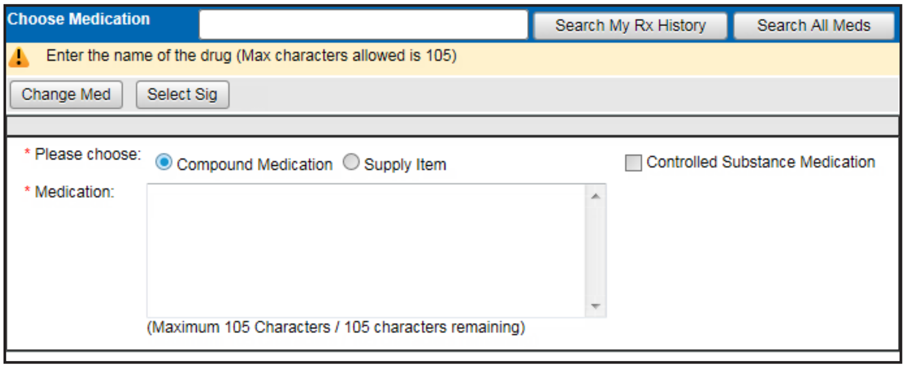
- **Dispense as Written** – Select this check box if no substitutes may be given at the pharmacy.
- **Library - Admin & Dosage** – Click this link to be directed to the Wolters Kluwer facts and comparisons library (Deluxe users only).
- **Special instructions to pharmacist** – Type any additional comments 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:

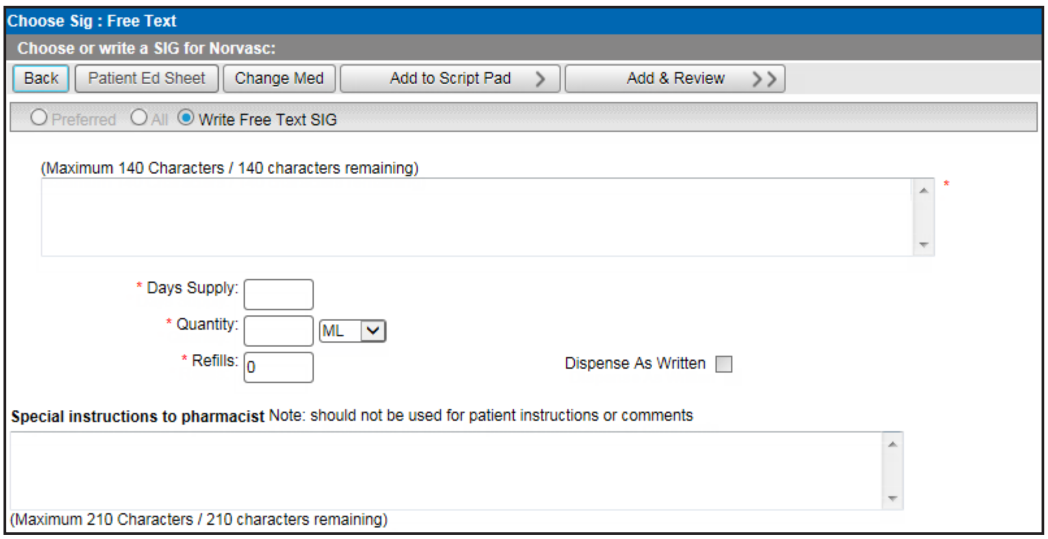
  a. Click **Write Free Form Rx**.

  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**.

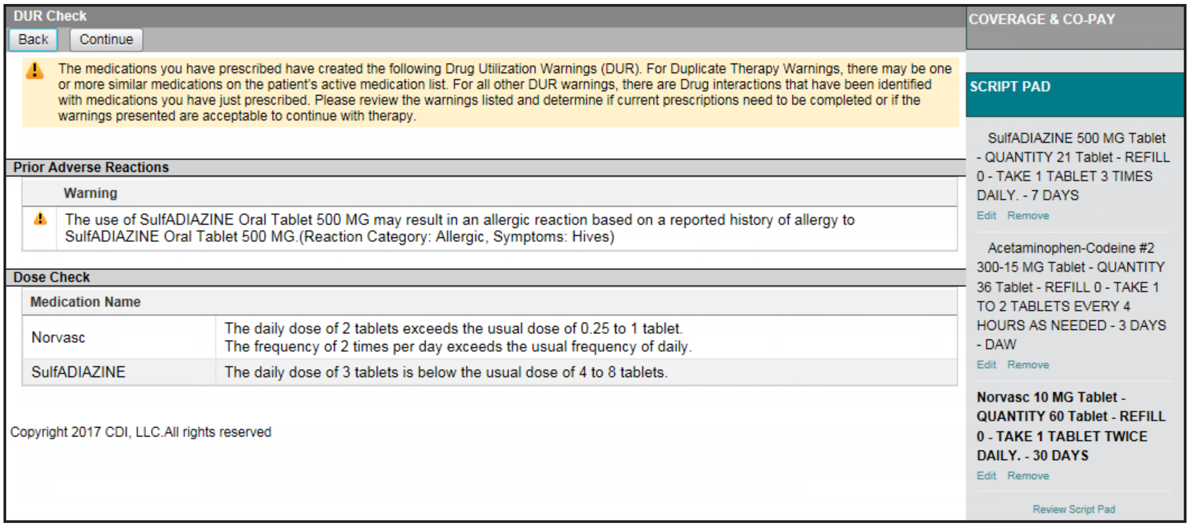


e. In the field, type a free-form prescription. This field has a maximum limit of 140 characters.

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.



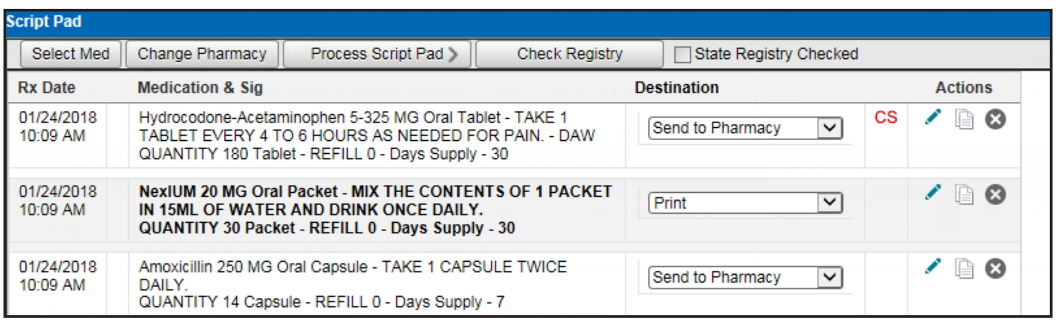
The **DUR Check** page displays all DUR warnings on one screen for all listed medications. The warnings are grouped by category (Prior Adverse Reaction, Duplicate Therapy, Drug to Drug Interaction, and so forth). Do the following:

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**.

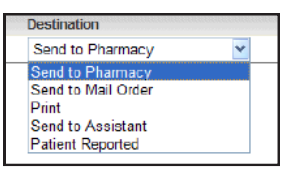
Note: You cam click **Back** to go back and choose a different medication for the patient, if necessary.

The **Script Pad** page appears.



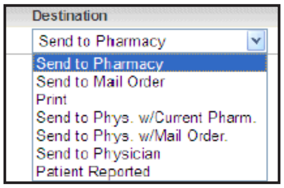
6. Review the listed prescriptions, and select the appropriate **Destination**.

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)

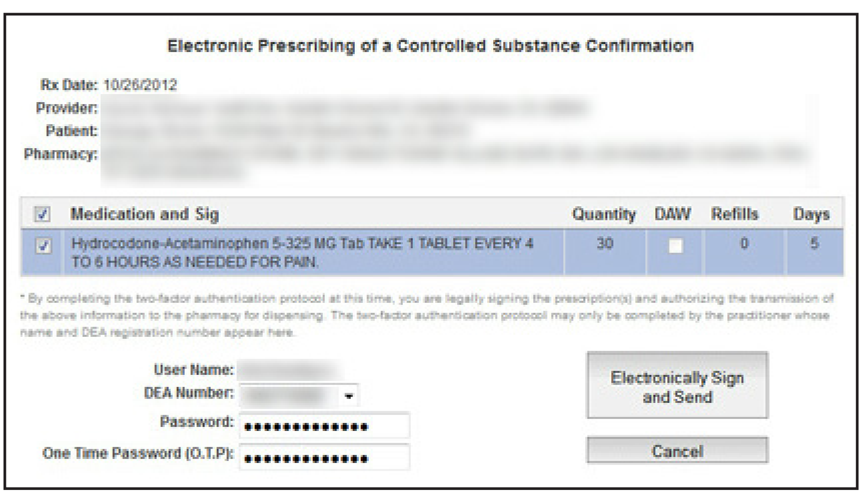


- **Send to Pharmacy** – Send the prescription to the retail pharmacy last used by the patient.
- **Send to Mail Order** – Send the prescription to the patient's mail order pharmacy.
- **Print** – Print the prescription for the patient (for any prescription with a Schedule II - V this is the default).
- **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**.