

## Credible ePCS/CDS Activation Checklist

Requesting Credible ePCS .....	2
Preparation for ePCS.....	2
Clinic Locations, Providers, Assignments.....	2
Provider Setup .....	3
<i>DEA-Registered Providers</i> .....	3
<i>Hardware Authentication Tokens</i> .....	3
<i>SPI/NonDEA Providers (e.g., ARNP, PA)</i> .....	3
<i>NonSPI Providers</i> .....	4
<i>Nurses with Create Prescription Rights</i> .....	4
ePCS Prescribing.....	4
<i>Via Medication Tab</i> .....	4
<i>Via Orders Tab</i> .....	5
Resources .....	5

## Requesting Credible ePCS

ePCS is a Credible Premium feature requiring a contract order form, addendum, or modification. To request access, please:

- contact your Partner Relationship Manager;
- email [contracts@credibleinc.com](mailto:contracts@credibleinc.com); or
- submit a task ticket requesting a contract addendum for the EPCS feature.

Please include the names of your DEA and Non-DEA EPCS Administrators with your request.

Upon receipt of signed contract, create and submit a task ticket requesting that Credible turn on this feature in your Domain. Partner Services will then configure your DEA and Non-DEA EPCS Administrators for each Clinic Location, and notify you when configuration is complete.

## Preparation for ePCS

1. Identify who you want for your **DEA EPCS Administrator**. They must have the same State DEA number as each Clinic Location, and will show in each Clinic Location table dropdown based on the “Is Doctor = Yes” setting in their Employee Profile.
2. Identify who you want for **Non-DEA EPCS Administrator**. These users will display in each Clinic Location table dropdown based on the Security Matrix right NonDEAEPCSAAdminCandidate.

## Clinic Locations, Providers, Assignments

1. Assign Administrator the Security Matrix right *ManageDEANumbers*
2. Go to the Employee tab and click the **Add Columns** button (“ice cube tray”).
3. Check the **Is Doctor?** Column, then click the **Save List** button.
4. Sort the list to identify your Providers (*Is Doctor? is True*).
  - a. **View** each Provider.
  - b. On the navbar, click the **Provider Profile** button and verify that these fields have been completed. If not, add the information.
    - State
    - DEA number
    - NADEA number (also known as XDEA/suboxone)
  - c. Verify the **Clinic Location** assignments for the Provider.
    - Identify **Primary** site. This will be the default in Clinic Location dropdown.
    - Verify the **Service Levels** available to the Provider (Refill, Cancel).
  - d. If a DEA number is present in the Identifier section, but does not display in the Prescription Rights and Clinic Location sections of the Provider Profile, please submit a task ticket.
  - e. If the DEA or NADEA numbers need to be edited or updated, but are associated with a Clinic Location, please submit a task ticket.
  - f. If any of the Provider information needs to be corrected, open a task ticket.

5. Validate your **Clinic Location** information: Name; Address; City; State; Zip; Phone; Fax. If any edits are required, open a task ticket.
6. Validate your list of active **Providers**. If any edits are required, open a task ticket.

## Provider Setup

### DEA-Registered Providers

1. Partner EPCS Administrators will check the candidate's Provider Profile: Grant EPCS rights to DEA Providers.
  - a. Non-DEA Admins **Request** that rights be granted.
  - b. DEA Admins will **Confirm** the candidate's request.
2. Upon selection of *Confirm* an order will automatically be placed for a hardware token for the provider.
3. This "Hard Token" will be shipped directly to the Provider's home address.

### Hardware Authentication Tokens

Upon receipt of the hardware token, the ePCS candidate will take the following steps.

- Participate in and pass ID Proofing via one of the following methods (in order of preference). Note: this requires that the hard token be available.
  - Answering 4 or 5 questions
  - US mail verification
  - Video conference
- Register the token
- Credible Best Practice: Register a smart phone with the token as a backup device
  - Download and activate "soft token" software

### SPI/NonDEA Providers (e.g., ARNP, PA)

These are the Credible Best Practices.

1. Create a new **Login Profile**.
2. In the Security Matrix, set up the Login Profile to mirror your existing SPI/DEA Providers, plus add the Security Matrix permission **RequireSupervisingProvidereRx**.
3. In ARNP/PA/Non-DEA Employee Profile, set **Can Supervise** to **Yes**.
4. In SPI/DEA Employee Profile, set **Can Supervise** to **Yes**.
5. When ARNP/PA prescribes as normal, eRx defaults to ARNP, and can select **ARNP** as *Supervising Provider*.
6. When ARNP/PA prescribes a Controlled Substance, eRx defaults to ARNP, and will need to **select from Supervising Provider**:
7. Supervising Provider with **DEA number** of the same state(s) as those they supervise;
8. \*Supervising Provider **must be assigned to the same Clinic Location** (that has EPCS rights);
9. If the user selects **Self** as *Supervising Provider*, and Rx is Controlled, the **Print/Send** button will not be available.

## NonSPI Providers

This is unchanged from the standard eRx procedures, and is the Credible Best Practice.

1. **Partner Config: Block Electronic Signatures (Schedule II)** should be checked. This is set by Credible staff; open a task ticket to request it.
2. NonSPI providers can still print prescriptions, requiring an ink signature.
3. If creating a prescription and planning to send electronically, the user must select a Provider with a DEA number and Clinic Location that have EPCS rights.
4. Submit for approval.

## Nurses with Create Prescription Rights

This is a Credible Best Practice.

1. Create prescription normally.
2. Select a Provider with a DEA number and Clinic Location having EPCS rights.
3. Submit for approval.

## ePCS Prescribing

### Via Medication Tab

**ePCS Provider** > Create Prescription > eRx > send > select EPCS Pharmacy > finalization >

1. Select Clinic Location with EPCS rights (Outpatient Clinic (EPCS))
2. Ready to sign – Two Factor
  - a. Login Passcode
  - b. Token (hard/soft) – press button and enter token code
3. Send
4. Electronic-Current medication row in Medications

**NonSPI/Nurse** > Create Prescription > eRx – select DEA/EPCS Provider > send > select EPCS Pharmacy > finalization > select Clinic Location (EPCS) > Submit for Approval

1. Doctor will find on Home > Unapproved Prescription Report
2. Upon selection > Medication tab for client > Complete
3. Select/verify Clinic Location with EPCS rights (Outpatient Clinic (EPCS))
4. Ready to sign – Two Factor
  - a. Login Passcode
  - b. Token (hard/soft) – press button and enter token code
5. Send
6. Electronic-Current medication row in Medications

## Via Orders Tab

**ePCS Provider** > Create Prescription > eRx > send > select EPCS Pharmacy > finalization >

1. Select Clinic Location with EPCS rights (Outpatient Clinic (EPCS))
2. Ready to sign – Two Factor
  - a. Login Passcode
  - b. Token (hard/soft) – press button and enter token code
3. Send
4. New Rx/Order will be found in Pending (ready for completion)

**NonSPI/Nurse** > Create Prescription > eRx – select DEA/EPCS Provider > send > select EPCS Pharmacy > finalization > select Clinic Location (EPCS) > Submit for Approval

1. Doctor will find on Home > Unapproved Prescription Report
2. Upon selection > Orders tab for client > will find Rx in Current Status (green)
3. Doc will select 'Complete' while in Current
4. Finalization Screen:
  - a. Select/verify Clinic Location with EPCS rights (Outpatient Clinic (EPCS))
  - b. Ready to sign – Two Factor
    - i. Login Passcode
    - ii. Token (hard/soft) – press button and enter token code
  - c. Send
  - d. New Rx/Order will be found in Pending (ready for completion)

---

## Resources

### Surescripts Video

<http://getepcs.com/?page=e7f03a92-4a49-4be5-9d78-05a5562f3090&regions=tag-3:1f544c3d-de30-4d8d-a63a-457e08f8a98f>

### Credible Help

You will find the most up-to-date resources and instructions for ePCS/CDS in Credible Help. Look under **Help by Module > Credible ePCS (CDS)**, or click this link: <https://help.crediblebh.com/CredibleHelp/>