EPCSGoldSM 2.0
E-prescribing of Controlled Substances
On-Boarding Manual
1) Every EPCS provider will receive an invite from DrFirst (DO-NOT-REPLY-
EPCS@epcsdrfirst.com) and must use this to initiate the process to activate their EPCS
token. This email may have gone to your junk folder, so make sure to check both your
inbox and the spam/junk folder for it.

2) Within the email, you will find a link listed under (1) within the directions. You must click
this link to initiate the process to activate your token. The invite message also includes
your invite ID so save this email in case you do not complete the process.
3) This link will take the provider to the following page where NPI# and Invite ID will already be pre-populated in the “I have an Invite” section, just confirm the information is the same as what is in the email you received.

4) 

5) Note: You may be required to scroll down and to the right to find the boxes including the Invite ID when launching this page. Some browsers, such as Internet Explorer, do not condense the information at the top of the page.

6) DO NOT START THIS PROCESS WITHOUT YOUR EPCS TOKEN. Even if you get through the identity-proofing (IDP) process, you cannot complete the last step without your token.
7) As a provider, you can also access the EPCS Gold website through Rcopia, by clicking on the EPCS Gold link at the top of the screen. When accessing the EPCS Gold page this way, you will be required to enter the invite ID yourself.
8) Once you have logged in, the first step will be to accept the terms of use, shown below:

9) Second, the provider needs to pay attention to the prerequisites that are displayed on the next screen (see below):

- Next, the provider must enter any information within the user registration screen that was not uploaded by the NPI Registry marked with a red asterisk (*). Please note: NPI, First Name, and Last Name will be pre-populated with data from the National Plan & Enumeration System (NPES). Providers will not have the ability to change the content of these fields.

10) NOTE: It is very important that the address that is entered matches the provider’s home address, not the practice address. This address will only be used for the IDP Process and must match the billing address of the credit card being provided. Use a personal credit card, not a debit card or a business credit card, and only the first 8 characters are required for the CC. Even though the Credit Card and/or Phone # are not mandatory fields, it will help with passing the Identity Proofing
process. If the provider chooses to use the Credit Card field, make sure a personal Visa or Master Card (not debit) registered under their name at their residential address is being used. If they choose not to use a credit card, it is strongly recommended to provide telephone number associated with their residential address (landline or cell phone).

11) When entering your DEA #, please use all capital letters, for example AA1234567, not aa1234567, nor Aa1234567.

12) Enter your primary DEA #, not a special DEA # or special identification # that has been assigned to you in order to prescribe addiction medications.

13) Providers who unsuccessfully enter their demographic information will not be presented with financial history based questions. Instead they will see a message after entering their demographics that informs them of an unsuccessful identity proofing.
14) If the demographics were entered correctly, the provider will be required to answer 3 to 4 questions pertaining to their personal financial history.

**User Registration**

Fields marked with * are mandatory

Please answer the following questions which are based on records from your credit profile:

1. According to your credit profile, you may have opened an auto loan in or around September 2012. Please select the lender for this account. If you do not have such an auto loan, select "NONE OF THE ABOVE/DOES NOT APPLY."
   - BMV FINANCIAL SVC
   - CHRYSLER CREDIT
   - TRANSPARENT
   - CHASE MANHATTAN BK
   - NONE OF THE ABOVE/DOES NOT APPLY

2. You may have opened an auto loan or auto lease in or around September 2012. Please select the dollar amount range within which your monthly auto lease or lease payment falls. If you have not had an auto lease or lease with any of these amount ranges now or in the past, please select "NONE OF THE ABOVE/DOES NOT APPLY."
   - $200 - $399
   - $300 - $499
   - $400 - $599
   - $500 - $699
   - NONE OF THE ABOVE/DOES NOT APPLY

3. You may have opened a mortgage loan in or around March 2012. Please select the dollar amount range within which your monthly mortgage payment falls. Please note that mortgage payments include principal, interest, and escrow (escrow includes taxes and insurance if collected by lender). If you have not had a mortgage payment now or in the past, please select "NONE OF THE ABOVE/DOES NOT APPLY."
   - $0 - $79
   - $80 - $179
   - $180 - $379
   - $380 - $779
   - NONE OF THE ABOVE/DOES NOT APPLY

15) If Experian was unable to verify your identity based on your answers to the first 3 questions, you will be presented with a 4th question.

**User Registration**

Fields marked with * are mandatory

Please answer the following questions which are based on records from your credit profile:

1. You currently or previously resided on one of the following streets. Please select the street name from the following choices."
   - 4TH
   - PENNSYLVANIA
   - LESTER
   - OGDEN
   - NONE OF THE ABOVE

16) Based on the answers as well as the initial information that were entered on the previous screen Experian will determine whether the user successfully passed or failed.

17) If you fail, you must start the IDP process over.
18) **Note:** If you fail 3 times, do not attempt to go through the IDP process again for 24 hours. Once you have failed 3 times, your account will be locked and you cannot complete the process successfully until after 24 hours has passed since your last attempt.

19) Once completed successfully, you will get a confirmation that you have verified your identity.

20) Next, you must create a passphrase that will be used to access your account in the future and during the process of sending a scheduled medication within Ropia. The passphrase needs to be at least 8 characters long, with at least one capital letter and one number.

21) You must also create a security question and answer in case you ever forget your passphrase as it can only be reset by the user and not by our technical support team.
22) You will then get a notification that you have created the passphrase successfully.

23) Finally, you will be asked to add your EPCS token(s) to your account. In order to do this, you will need the yellow?? hard token that you received from DrFirst, which is shown below. The One-Time-Password/Pin (OTP) can be obtained by pushing the blue button.

24) You can also use a soft token to activate your account. This can be downloaded onto a Smartphone or tablet device from Symantec. Simply, access your App Store and search for the app titled VIP Access. The symbol for this app is also shown below:
25) You will then be asked to enter the following information:

a. A nickname for your token
b. The serial number from the back of the hard yellow token, which starts with AVT, or the Credential ID from the token downloaded from the App Store, which starts with VSMT. When entering in the serial number, make sure to enter the serial number/Credential ID with all capital letters.
c. The OTP pin number from the hard token (security code from the soft token).
   
   Note: On the hard token, the pin will reset and change every 30 seconds, so if it disappears before you have a chance to enter it, simply push the blue button again.

26) Providers now have the ability to add a multiple tokens to their account after completing the EPCS Gold identity proofing process. Providers that do not wish to add multiple tokens after completing the identity proofing process can choose to “Cancel Additional Token.” Providers will continue to have the ability to manage their tokens within the EPCS Gold Prescriber Dashboard later if needed.

27) If the provider is unable to bind their EPCS Gold hard token after successfully passing the identity proofing process, he/she will see a message asking for an additional PIN from the token. With the additional PIN, EPCS Gold will have the ability to recognize the token and sync it correctly.
28) Finally, you will get a confirmation that your token has been added to your account.

![Register Tokens](image)

29) The system will then log you out when complete.

![User Registration](image)

30) Once you complete the IDP process and activated your token, you will receive an **IDP Confirmation Code** within a letter from Experian through USPS First-Class Mail in a couple of days. This letter will be mailed to the address you provided during the IDP process above.

31) You will then need to log back into the EPCS Gold website, and enter the **IDP Confirmation Code** that is given in the letter to be fully enrolled.

32) Remember you can launch the EPCS Gold website by clicking the link in Rcopia, described in step 6 above, or by clicking the link with the original invite email you received from DrFirst.
33) In order to log back in, you will need your token to enter the OTP pin number, and the passphrase that you created when activating your EPCS token, described in step 13 above.

34) Note: If you have forgotten your passphrase, you can reset it by clicking the link above, titled ‘Forgot Passphrase’. You will need to enter the information below and answer your security question to reset your passphrase.
35) Once logged in, enter the IDP Confirmation Code or Transaction ID found in the letter sent to you by Experian. This code should be entered into the box shown below and then click ‘Continue’:

![Image of transaction ID verification]

36) Once completed, you are now ready to log into Rcopia with your administrator and activate your grant status. This is done through the Logical Access Control (LAC) process described in the EPCS GA Training Manual.
EPCS GA Logical Access Control (LAC) Manual

Admin/LAC:

1) Through the Rcopia application, the practice administrator and a validating provider are necessary to authorize a provider for EPCS. In order to do this, the admin must first login to his/her e-prescribing account.

2) Once logged in, the administrator will need to click the EPCS Gold link at the top of the screen. This link will launch the Logical Access Control (LAC) screen.

3) The LAC screen will list only those providers that have enrolled, meaning they have completed the IDP process with Experian, activated their token, and entered their IDP Reference ID successfully. All the providers with an inactive grant will be listed first.
4) **Note:** This screen will show no more than 50 providers, so if you do not see the provider you would like to activate, simply search for him/her at the top of the page.

5) Next, the administrator will need to change the LAC grant to ‘Active’ for any providers that need authorization to electronically prescribe controlled substances.

6) Next, the Validating Provider will need to identify him/herself on the LAC screen by entering their NPI number. The Validating Provider can be any provider that has an EPCS Status of enrolled. This could be the doctor being activated, or any doctor within the practice or any other practice enrolled with EPCS Gold.
7) Last, the provider will choose the OTP token from the list that he/she wants to use. The provider will need to enter his/her passphrase and the OTP pin from his/her token. Once the provider clicks ‘Authorize’, the provider will then be able to start e-prescribing controlled substances within the e-prescribing application.
8) If necessary, it is possible for the administrator to see the history of providers that have gone through this process through the Logical Access Control Activity Report.