

EPCS: Invite walk thru guide

E-prescribe non-controlled AND controlled substances

This guide is for prescribers that will be prescribing non-controlled and controlled substances. This process requires the addition of an authenticator “token” to your account. It is recommended that two tokens be added to a prescribers account, one in the form of a soft token and the other in the form of a hard token. One will act as a backup if the other gets lost or becomes unusable.

You'll receive an email (triggered by your administrator) inviting you to register to e-prescribe.

1. Click on the email link (Enroll now) to auto-populate information on the screen that appears. Then, select Proceed.

DrFirst **EPCSGold**

EPCS Gold™

EPCS Gold, provides a *Simple, Secure, and Certified* solution for sending Controlled Substance prescriptions electronically. EPCS Gold is a *Certified* solution, and has passed stringent auditing requirements set by the DEA. It is a *Simple* solution that fits with your current e-prescribing workflow, and a *Secure* solution which uses Two-Factor Authentication Protocol (TFAP) throughout the product to ensure a high level of trust and security for you as a provider.

If you are not yet enrolled for EPCS Gold, please make sure you have your *Invitation ID* and *two factor authentication token* in hand as you start the Identity Proofing process. Your Invitation ID can be found in the email invitation that was sent to your email address. If you are already enrolled, please use your NPI number, the number that is currently showing on your One-time password token, and the password you setup during the identity-proofing process or enter the unique identifier for your biometric device to log-in to manage your tokens, and add a new token for prescribing.

For more information on EPCS Gold, the Identity-Proofing process, and how to manage your tokens, please click on the "Need Help" link below. If you have additional questions or need to contact us, visit us at help.drfirst.com

[Need Help?](#)

Sign in

NPI

Passphrase

[Forgot Passphrase](#) [Report Lost Token](#) [Next](#)

I have an Invite

NPI #

Invite ID

[Proceed](#)


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2. Read and accept the terms of use for both EPCS Gold and InfinID by selecting all checkboxes. Otherwise, you will not be allowed to proceed.

3. For the next steps you will need:

- Driver's License, Passport, or State ID
- Two-Factor authentication token
- If you don't have one, follow instructions on the screen or review Requesting a Hard Token.
- A smartphone

Select **Continue**.







Reminder, you need:

- Driver's License, Passport or State ID
- A Two Factor ID Token
- A smart phone or tablet with a camera

Once started, you **must** complete identity proofing. Most people will complete it in 10-20 min. If you cannot complete it, you will need to start over.

After completing identity proofing, you will have the option to take a break before adding your two factor tokens, but they must be added **within 24 hours** of starting this process.

OneSpan and/or Symantec Token



- Must have at least one token
- Two tokens are recommended for backup purposes

Don't have a token?

- Request a **OneSpan Digipass GO7** from your EHR/EMR vendor
- Request a **Symantec** token from your EHR/EMR vendor
- Download **VIP ACCESS** from the App Store or Google play

Continue

Cancel

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4. Complete mandatory fields: Home Address, DOB, Mobile Phone Number, Social Security Number (SSN).

Home Address: Please enter the address related to your financial records. This is typically a home address. Please do not input any special characters within the address field.

Recommended field: Credit Card Number. While this is not required, it is highly recommended as this can increase your chances of passing IDP if you fail the first time. Please enter a personal credit card that is either a VISA or Mastercard. You will NOT be charged; Experian requires only the first 8 digits.

The screenshot shows the 'Identity Proofing Process: Evidence Collection' form. At the top, the InfinID logo is visible. Below it, a progress bar shows five steps, with step 2 highlighted in orange. The form contains several input fields: 'Home Street Address*', 'Home City*', 'Home State*' (a dropdown menu), 'Home Zip Code*', 'Date of Birth (mmddyyyy)*' (with separate dropdowns for Month, Day, and Year), 'Mobile Phone Number*', 'Social Security Number*', and 'Credit Card Number'. There are also fields for 'NPI:' and 'DEA:'. A 'Continue' button and a 'Cancel' button are at the bottom left. At the bottom right, there is a disclaimer: 'We have partnered with Experian to ensure only authorized prescribers have access to DrFirst.' and the Experian logo. A list of bullet points is also present: '• VISA or MASTERCARD only', '• Your card will NOT be charged', and '• May reduce your number of Identity Proofing Steps'.

Based on the information you provided, Experian will determine whether or not you have successfully passed IDP.

Note: If you fail three times, this will lock your account. You cannot attempt IDP again for a full 24 hours.

- If you successfully pass, continue to step 5.

If Experian cannot validate your information, you may be required to answer 3-4 knowledge-based questions pertaining to your financial history. If Experian can validate your information, then your process will continue without the knowledge-based questions.

5. If your information is verified by Experian, you'll see a screen prompting you to scan a QR code with a mobile device. If you're already on a mobile device, you'll select Tap here instead.

Before you continue, be sure to copy your temporary session password in case your session times out.

Identity Proofing Process: Identity Document

1


2

3

4

Document and Photo Capture

This section must be completed on a phone or tablet with internet access and a camera.



Use a smartphone or tablet to scan the QR code to continue your session on a mobile device.

On a mobile device?
[Tap here.](#)

This QR Code can only be used once. If this portion is not completed within an hour, you will need to start the process over.

In the event of a session timeout, record this code to resume where you left off:

kt7JW

After completing the mobile portion, verify your record has been updated to continue.


[Check Status](#)

If your information was not verified by Experian, you may be asked credit related questions before proceeding.

6. Selecting Let's Get Started indicates your consent to move forward with verifying your identity. This includes taking a photograph of an identification card or passport.

4:37

LTE

 **InfinID** | ID Verification

Verify your identity

We need to make sure it's really you. This is required but it won't take long.

By clicking submit, I agree that my "selfie" photo and images of my government-issued identity document will be collected and sent to a third party service provider to confirm my identity and for fraud avoidance purposes. Specifically, I agree that:

- The images of my government-issued identity document will be used by a third party to verify of the authenticity of the document through electronic analysis of the document's embedded security features.
- The "selfie" photo and the portrait on my government-issued identity document will each


Let's get started >

X Cancel Session

7. Select the type of identification (e.g., ID card) you want to submit for identity proofing.

4:37

LTE

 **InfinID** | ID Verification

Select a document

Select the type of document you would like to use to verify your identity.

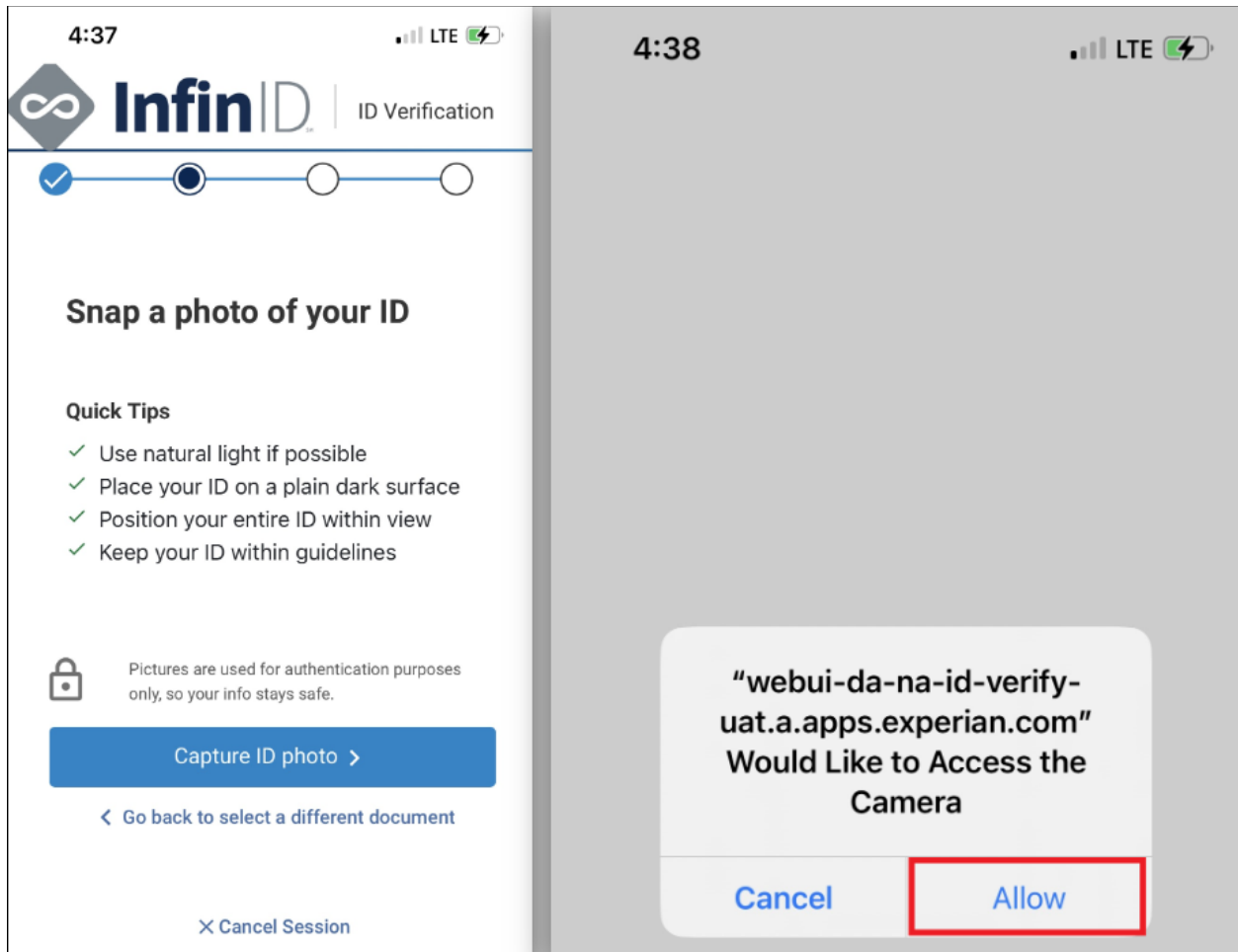
US / Canada DL and ID

International ID Cards

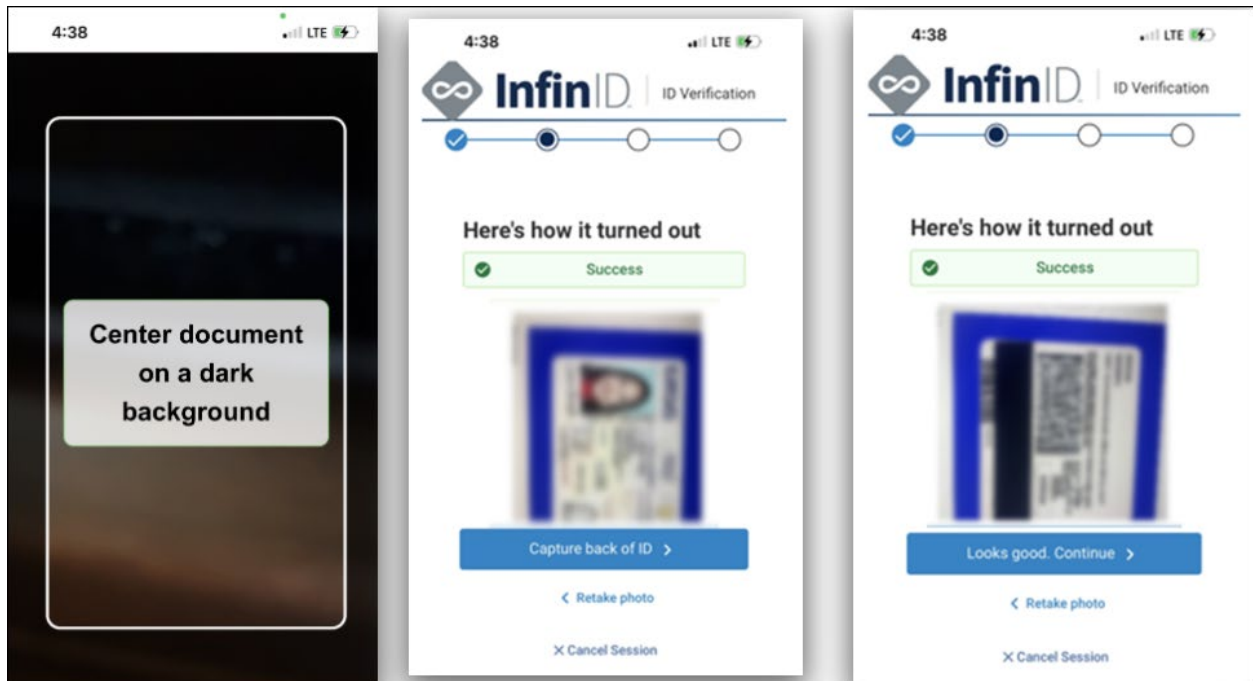
Passport Booklet

[X Cancel Session](#)

8. Allow access to your camera by selecting Capture ID photo.

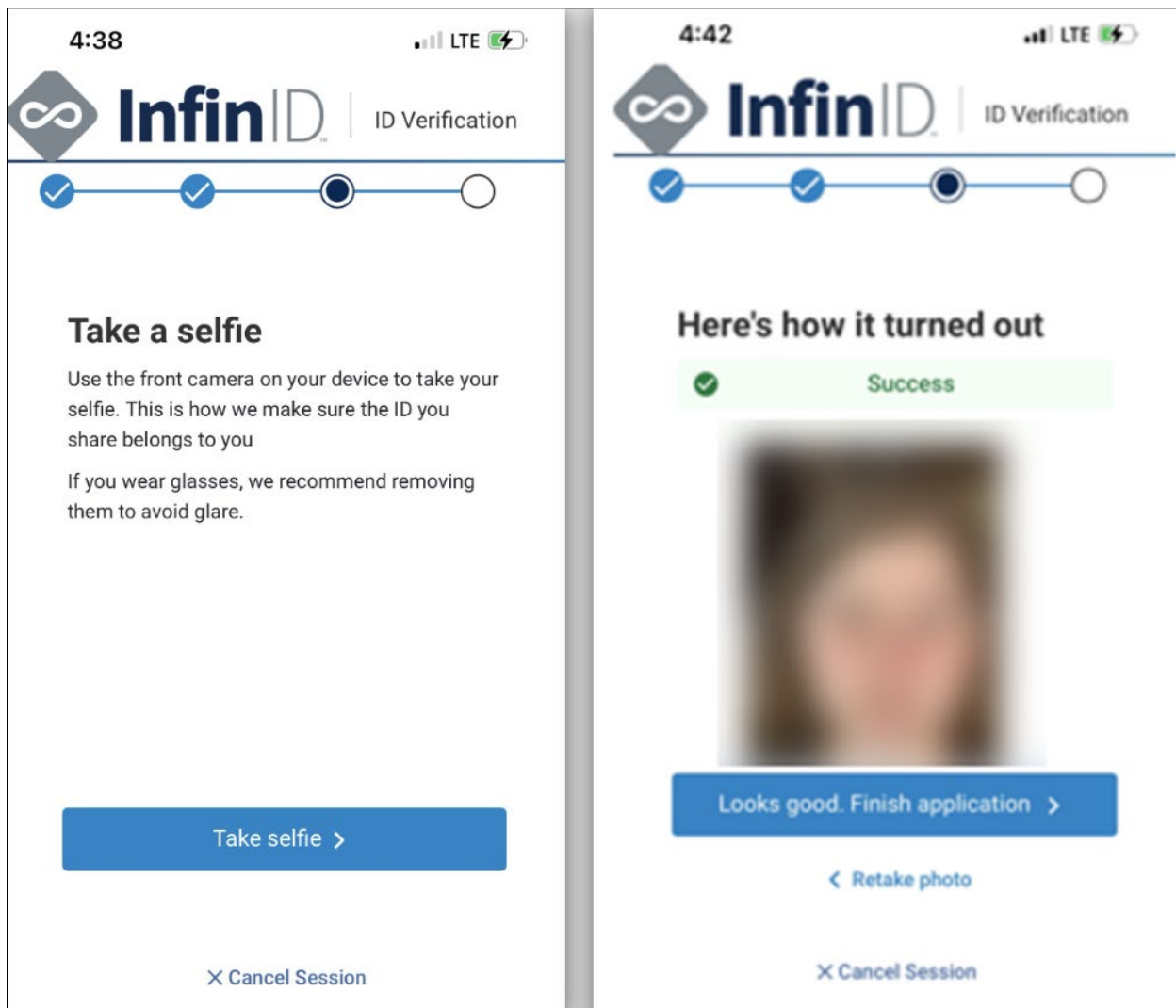


9. Center the front of your identification on screen and photograph it. Repeat this step with the back of your identification. Continue once you're satisfied with the photos.

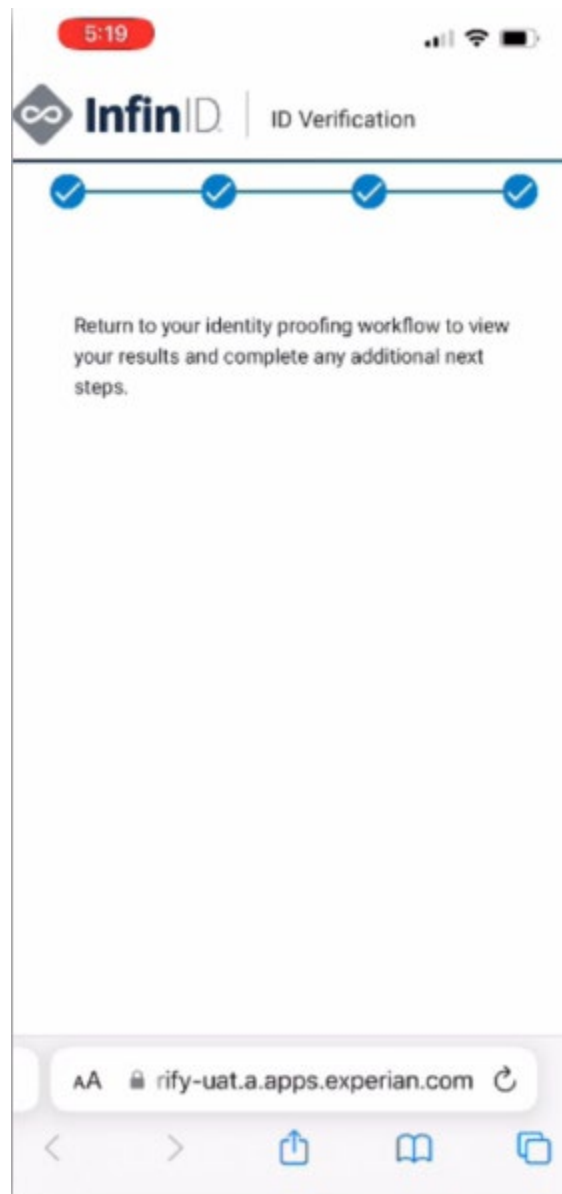


10. Select Take selfie to take a photograph of yourself. Continue once you're satisfied with your photo.

Recommended: Take a photo without glasses.



The application will prompt you to exit from your mobile screen to go back to the identity proofing screen where you scanned the QR code.



Once back on the screen shown below, select the **Check Status** button.

The screenshot shows the 'Identity Proofing Process: Identity Document' interface. At the top right is the 'InfinID' logo. Below it is a progress bar with six numbered steps: 1, 2, 3 (highlighted in orange), 4, 5, and 6. The title 'Identity Proofing Process: Identity Document' is displayed in orange. Below the progress bar, the section is titled 'Document and Photo Capture'. A red banner states: 'This section must be completed on a phone or tablet with internet access and a camera.' The main content area is divided into two sections. The left section features a QR code and the text: 'Use a smartphone or tablet to scan the QR code to continue your session on a mobile device.' Below this, it says 'On a mobile device?' and 'Tap here.' with a blue link. The right section contains the text: 'In the event of a session timeout, record this code to resume from where you left off:' followed by the code 'D0ETZ' in large, bold letters. At the bottom left, a note says: 'After completing the mobile portion, verify your record has been updated to continue.' To the right of this note is a blue button labeled 'Check Status'. The footer at the bottom of the page reads: '© 2013 - 2024 DrFirst.com. All rights reserved.'

11. You'll receive an email confirmation that you successfully verified your identity. Otherwise, you will be prompted to retry the process.

Note: Please keep this email to use later; otherwise, you may need to restart the whole process.

12. Next, add an authenticator ("token") to your account. This token generates a one-time-pin (OTP), which acts as a security code in two-factor authentication for e-prescribing controlled substances.

There are 2 main types of authenticators that you can add to your account:

Symantec VIP Access app (also called a soft token).

Physical device (also called a fob or hard token) manufactured by either Onespan or Symantec.

To add a token, fill out the required fields as they appear on screen:

For our scenario:

Token Manufacturer = SYMANTEC

Token Issuer = DRFIRST


Token Type = OTP SOFT TOKEN (if using a hard token then choose OTP HARD TOKEN)

Token Nickname = Create a nickname that you will remember. This is what will show in Rcopia.

Serial Number or Credential ID = Enter ID found on VIP Access app under Credential ID. For the soft token, Symantec VIP, you want to include the characters in front of the digits. For example, SYMCxxxxxx. Make sure to include the 'SYMC' in front of the digits. Use the full credential ID.

If you have a hard token it is found on the back. Enter only the numbers, exclude any dashes.

One Time Pin (OTP) = This is found on app or hard token and is called Security Code or six-digit pin.



Identity Proofing Process: Token Registration

1

2

3

4

5

6

Progress saved! To avoid restarting identity proofing, a **token** must be added **within 24 hours of beginning the process**.
To re-access your session for any reason, use the link in your email, along with this code:

xt3hd

Registering a Two Factor Authentication Token

A token is **required** to complete identity proofing and to send controlled substance prescriptions.
A second token is **recommended** so that in the event of token failure, a backup token may be used.
If no backup token is present, you will be required to complete the **entire identity proofing process** again.

Token ManagementFields marked with * are mandatory

Token Nickname	Credential ID	Manufacturer	Issuer	Type	Auth
----------------	---------------	--------------	--------	------	------

Add New Token

Continue

Add Two Factor Authentication Token

Token Manufacturer *

SYMANTEC

?

Token Issuer *

DRFIRST

?

Token Type *

OTP SOFT TOKEN

?

Token Nickname *

?

Serial Number or Credential ID *

?

One Time Pin (OTP) *

?

☐ Show Clear Text

Hard Token

Soft Token

13. Next, create your passphrase, which is the password you'll use to e-prescribe controlled substances as part of two-factor authentication. **It is important that you remember this passphrase. Keep it stored in a secure place. Take time to think about what you want it to be so that you can remember it.** It can be changed if forgotten but if you forget it then you must remember your security question and answer to do so.

Create a security answer and question which you may use in the future to access your account and recover your passphrase. These fields are case sensitive.

A passphrase is a password used to authenticate any controlled substance prescriptions. This passphrase is used in combination with your token in a two part authentication (TFA) process.

Please create your passphrase and security question. This security question is used in the event you forget your passphrase and need to recover it.

Passphrase *

- 8 -20 Characters
- Min 1 Upper Case
- Min 1 Lower Case
- Min 1 Number

Confirm Passphrase *

Security Question *

What is your mother's maid

Security Answer *

Smith

☐ Hide Clear Text

Continue

Cancel

14. Next, you will receive a verification code via text message or mail.

- You will get a text message if Experian verified your mobile phone number. **Note:** If you didn't get your text message instantly, click **Didn't receive your code?** to try again.
- You will receive a letter in the mail within 5-7 days if Experian only verified your mailing address or if you were unable to receive a text message.

Identity Proofing Process: Verification Code

1 2 3 4

Confirmation Required

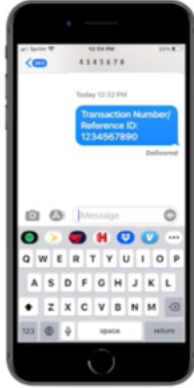
Your identity has been verified.

You will receive a code at the following number:
(***) *** .

Codes may take up to 5 minutes to be received.
You will need to enter this number to complete the process.

Verification Code *

[Didn't receive your code?](#)



Continue Cancel

Enter verification code received via text message instantly

DRFIRST
9420 KEY WEST AVENUE SUITE 230
ROCKVILLE, MD 20850

Verification Code

887053

Expires : 02/18/2024

XXXXXX



January 18, 2024

Hello Betty Jackson,

Thank you for keeping ePrescribing safe and completing identity proofing. Follow these final steps to complete your account setup for prescribing electronically.

- 1 Log into your email and click the link in your results.
- 2 You will be prompted to enter either your NPI or two-factor credentials.
- 3 Submit the 6 digit Verification Code displayed above.
- 4 Your Identity Proofing will then be complete and you can prescribe non-controlled substances.
- 5 **Controlled Substance Prescribers:** You will still need to complete your LAC (Logical Access Control) Process with your organization administrator to be able to use your passphrase and token to send controlled substance prescriptions.

Letter with QR code/verification code

15. If you received the verification code after you timed out of your session (either via text or email), use the email link you received from InfinIDAdmin@drfirst.com to enter your verification code.

Note: If you cannot locate this email, you will need to ask your administrator to send you an invitation to begin the identity proofing and registration process again.

16. In addition to your verification code, enter your passphrase and a one-time-pin from one of the tokens you registered previously.

Identity Proofing Process: Verification Code

1 2 3 4 5 6

Confirmation Required

Your credentials have been bound to your identity.

You will receive a code at the following number:
(***) *** -

Codes may take up to 5 minutes to be received.
You will need to enter this number to complete the process.

Verification Code *

Passphrase *

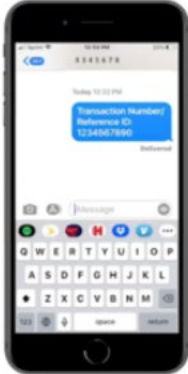
Select Token * (test) ▼

One Time Pin *

☐ Show Clear Text

[Didn't receive your code?](#)

[Forgot Passphrase?](#)



Enter verification code entered via text message

If you did this by mail letter you would see the example below.

The screenshot shows the 'Identity Proofing Process: Verification Code' page. At the top right is the InfinID logo. The main heading is 'Confirmation Required'. Below it, a message says 'Please enter your Verification Code from your Drfirst mailer.' The form contains four input fields: 'Verification Code *', 'Passphrase *', 'Select Token *' (a dropdown menu), and 'One time passcode *'. There is a 'Forgot Passphrase?' link and a 'Show Clear Text' checkbox. At the bottom left are 'Continue' and 'Cancel' buttons. On the right, there is a box representing a mailed letter from DrFirst, which includes fields for '(Physician Name)', '(Address)', '(City, State, Zip)', and a 'Transaction Number: xxxxxxxxxxxx'. The footer contains the copyright notice '© 2013 - 2024 DrFirst.com. All rights reserved.'

Enter verification code received via mailed letter

17. When you are done, you will see a confirmation message that you've completed identity proofing and enrolled to e-prescribe controlled substances (EPCS).

Contact your administrator so they may complete Logical Access Control (LAC), which is the last step to authorize you to e-prescribe controlled substances.

The screenshot shows the 'Congratulations!' page. At the top right is the InfinID logo. The main heading is 'Congratulations! You have completed the Identity Proofing and EPCS Enrollment Process!'. Below this, a message states: 'Before you can begin electronic prescribing controlled substances, each organization must grant you access. Please contact your organization's administrator to complete this activation process.' At the bottom, it says: 'If you or your administrator need further assistance, please contact support at Rcopia.'

If you will be e-prescribing controlled substances, you'll need to contact your administrator after you pass identity proofing and register your authenticator ("tokens") for two-factor authentication.

Before you can begin e-prescribing controlled substances, your administrator will need to complete Logical Access Control (LAC) to authorize ("activate") you for EPCS.