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.

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**.

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 <u>NOT</u> be charged; Experian requires only the first 8 digits.

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.

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.

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

8. Allow access to your camera by selecting Capture ID photo.
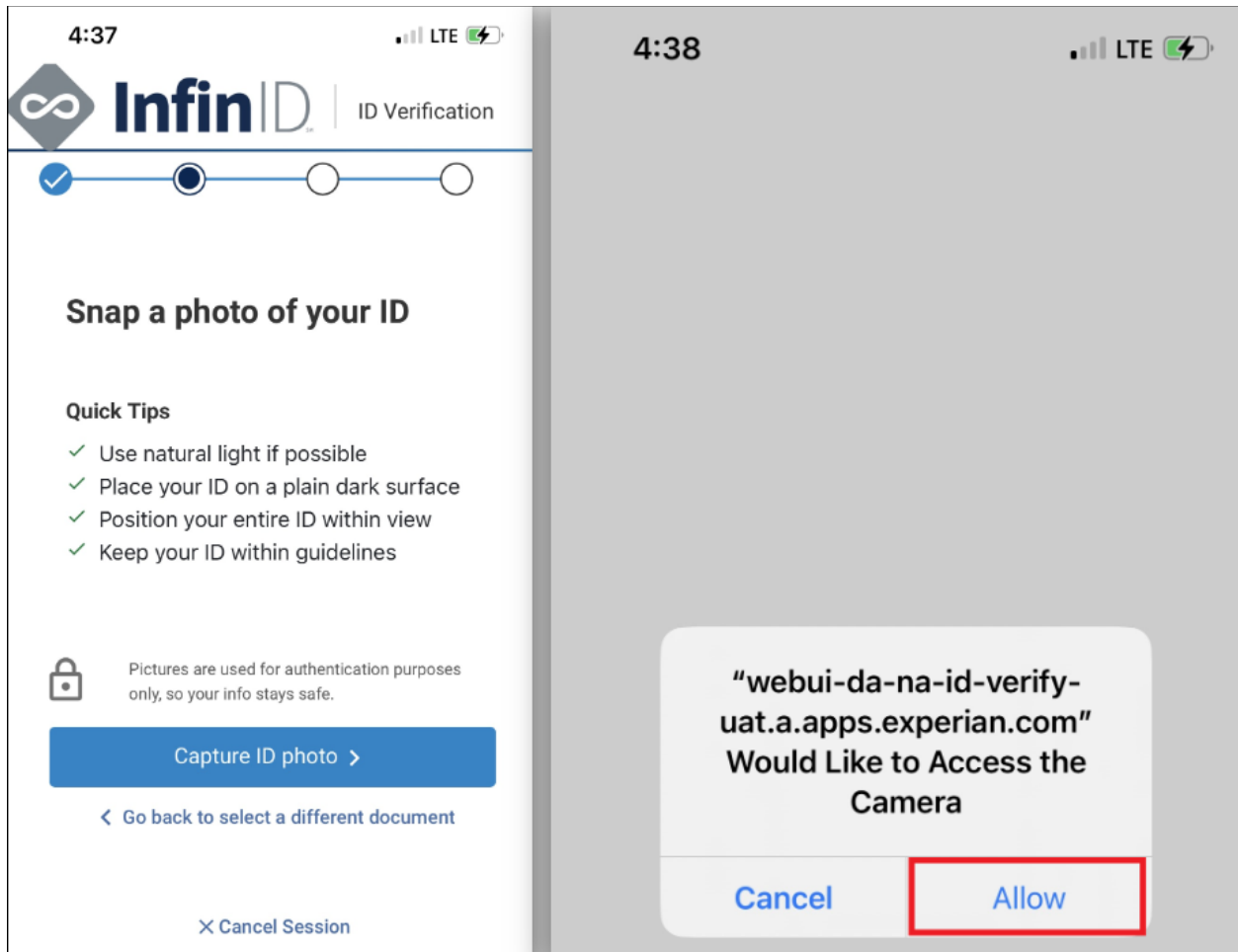
9. Center the front of your identification on screen and photograph it. Repeat this step with the back of your identification. Continue once you're satisfied with the photos.
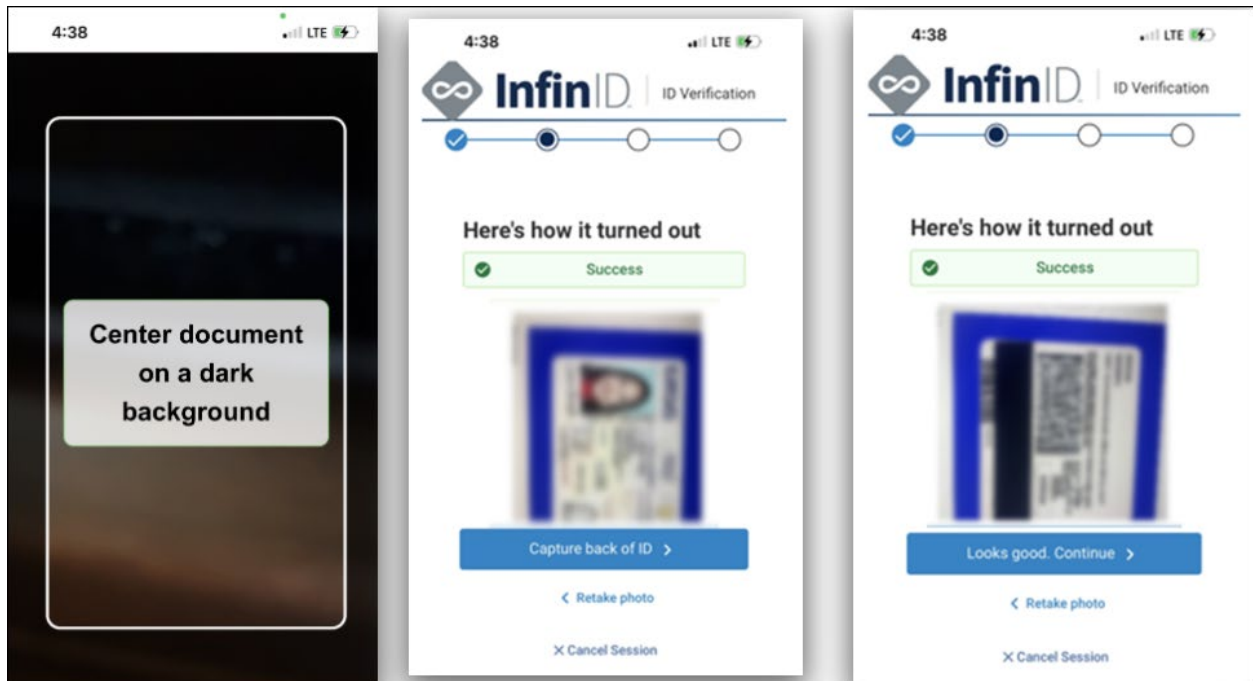
10. Select Take selfie to take a photograph of yourself. Continue once you're satisfied with your photo.

Recommended: Take a photo without glasses.
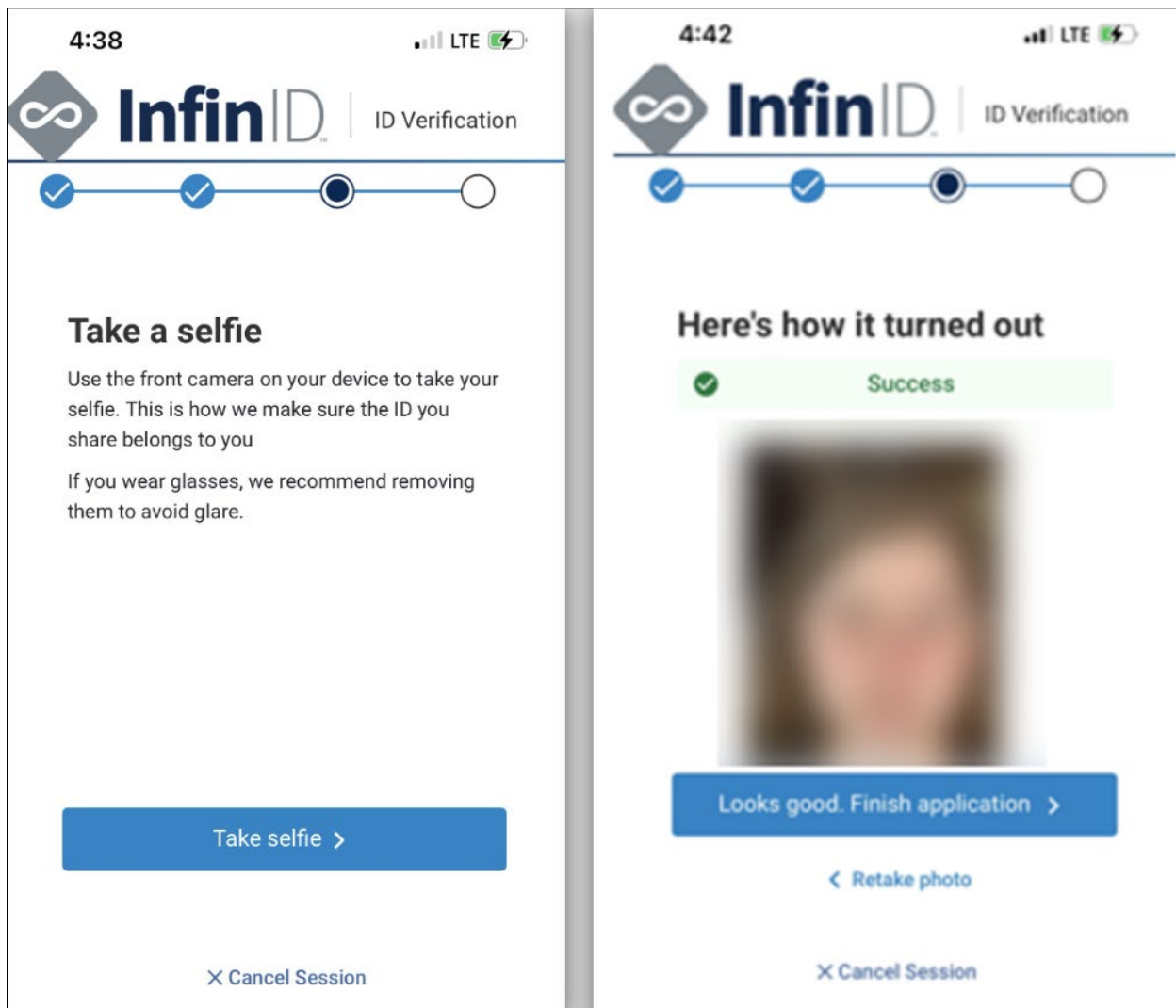
The application will prompt you to exit from your mobile screen to go back to the identity proofing screen where you scanned the QR code.

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

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.

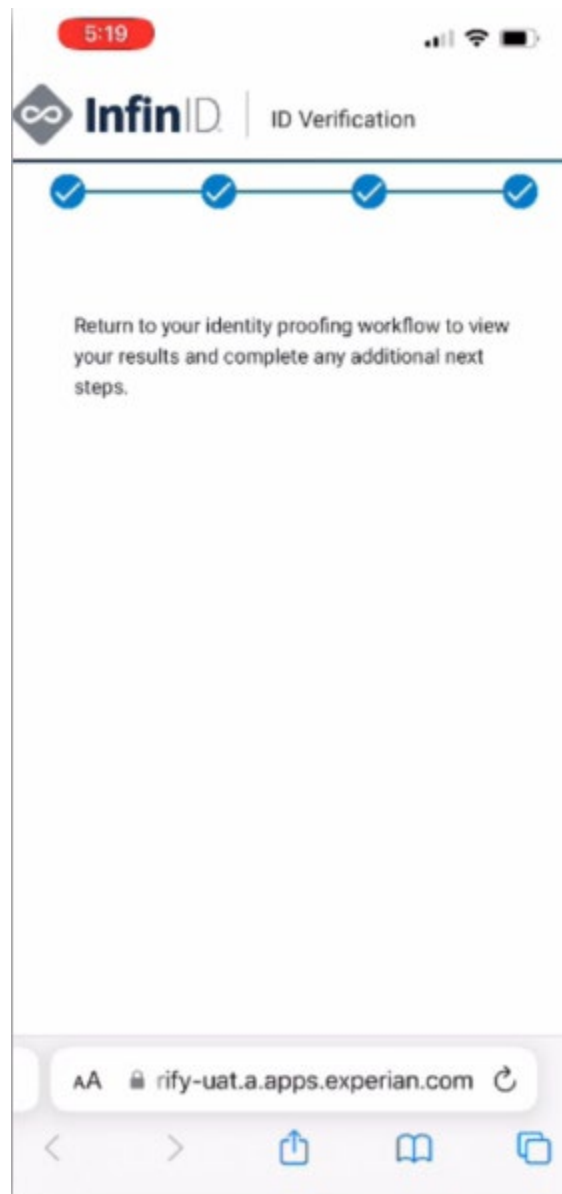There are 2 main types of authenticators that you can add to your account:

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.

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
Confirm Passphrase *	••••••••••	• Min 1 Number
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.
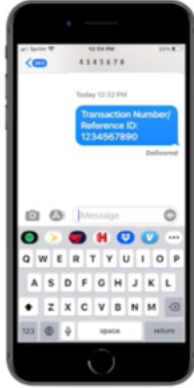
Enter verification code received via text message instantly

XXXXXX
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DrFirst
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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.
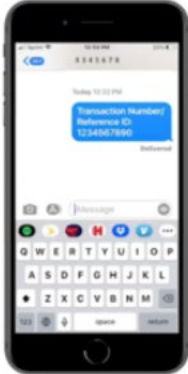
Enter verification code entered via text message

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

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.

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.