



Visual EMR

Associating Physicians with their Tokens
Electronic Prescribing of Controlled Substances (EPCS)
For New York State as of 3/27/2016

User Manual

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Important: This manual assumes that the physicians in your facility already received and activated their IdenTrust Token.



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<http://www.IdenTrust.com/igc/rhs>

- ▶ EPCS Regulation 1311.110

§1311.130 Requirements for establishing logical access control—Institutional practitioner.

“(a) The entity within an institutional practitioner that conducts the identity proofing under Section 1311.110 must develop a list of individual practitioners who are permitted to use the institutional practitioner’s electronic prescription application to indicate that controlled substances prescriptions are ready to be signed and to sign controlled substance prescriptions. The list must be approved by two individuals.

“(b) After the list is approved, it must be sent to a separate entity within the institutional practitioner that enters permissions for logical access controls into the application. The institutional practitioner must authorize at least two individuals or a role filled by at least two individuals to enter the logical access control data. One individual in the separate entity must authenticate to the application and enter the data to grant permissions to individual practitioners to indicate that controlled substances prescriptions are ready to be signed and to sign controlled substance prescriptions. A second individual must authenticate to the application to execute the logical access controls.”



► Form to be signed by your Administrator and Medical Director and returned to RHS

Complete This Form and Return it to RHS

Fax: 718-534-3142, or e-Mail: HZelcer@ReliableHealth.com

The administrator and the Medical Director sign below:

Administrator

Medical Director

By signing above we hereby authorize the following two individuals to grant access in VISUAL EMR to physicians for prescribing controlled substances.

Administrative Name (please print)

Physician Name (please print)

(Two people must be assigned. The Administrator and the Medical Director may assign themselves to the applicable role.)

Upon receipt of this authorization form RHS sets up these individuals who, in turn, can authorize physicians to use VISUAL EMR to prescribe controlled substances, provided the physician has a DEA number and a Token for dual authentication.

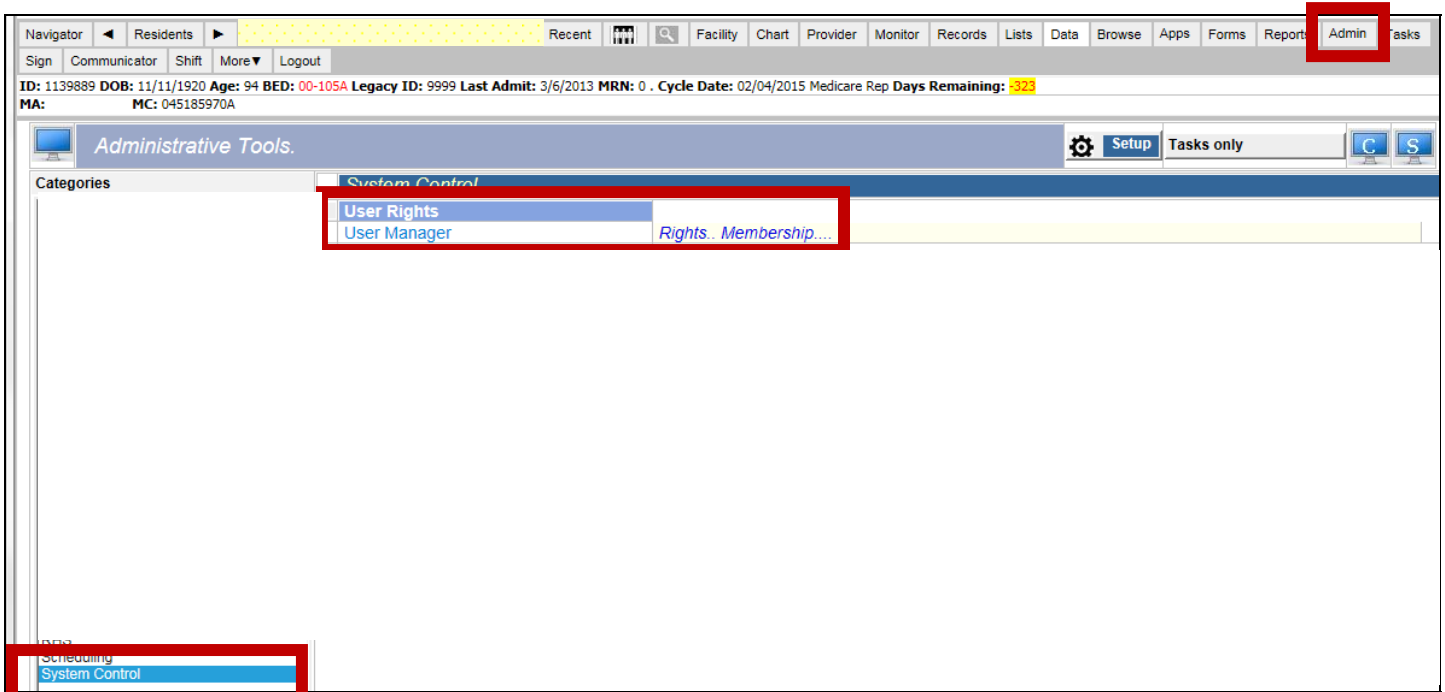
RHS will notify the facility as soon as it is set up.



- ▶ Define the responsibilities/privileges of each user (i.e., Administrator, Medical Director or Physician)

The individuals chosen on the previous page will have the ability to define EPCS access rights for the physicians in your facility.

Define each EPCS user:



As shown above:

- Click '**Admin**'
- Click '**System Control**'
- Click '**User Manager**'

The following screen appears



As shown above:

- Click '**General**'

The following screen appears:



The screenshot shows the 'General' tab for user 'Simon, Paul'. The search bar contains 'simon'. The user list shows '101060 Simon,Paul simon RPT RHS'. The 'Administrative Rights' section is expanded to show the 'General' tab. The 'Rights' section is also expanded, showing a list of roles and their corresponding permissions.

Id	Role	Permission
9	e-Prescribing - EPCS Administrator	No
10	e-Prescribing - Rights for Prescription of Controlled and Non-Controlled Drugs	All
11	Facility administrator	No
12	Medical director	No
13	System administrator	No

On the screen above:

At **'Search'** type a few letters of the user's name.

When you see the name, click on the Id number to the left of the name.

At **'9'** Select **'Yes'** if this person has the right to grant EPCS access to physicians.

At **'10'** select the types of medication this person may prescribe: **'All'**, **'Non-controlled'**, or **'Controlled only'**. If this person is an administrative person (i.e., not a physician) select 'not allowed.'

At **'11'** select **'Yes'** if this person is the facility's Administrator.

At **'12'** select **'Yes'** if this person is the facility's Medical Director.

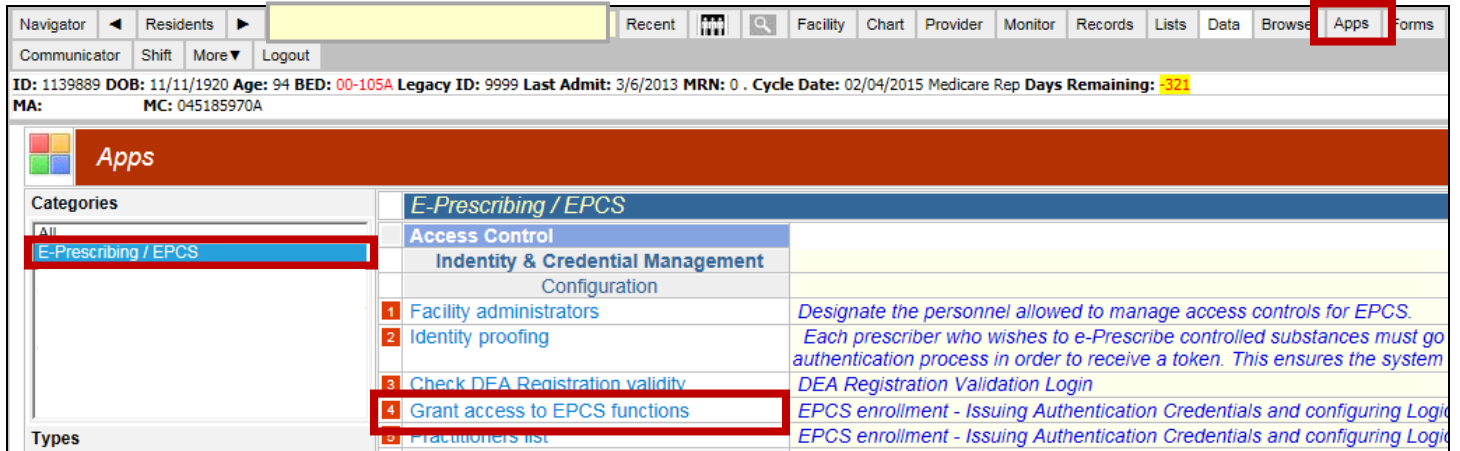
At **'13'** select **'Yes'** if this person is a System Administrator.

Click **'Save'**.

Repeat above steps for each EPCS user.

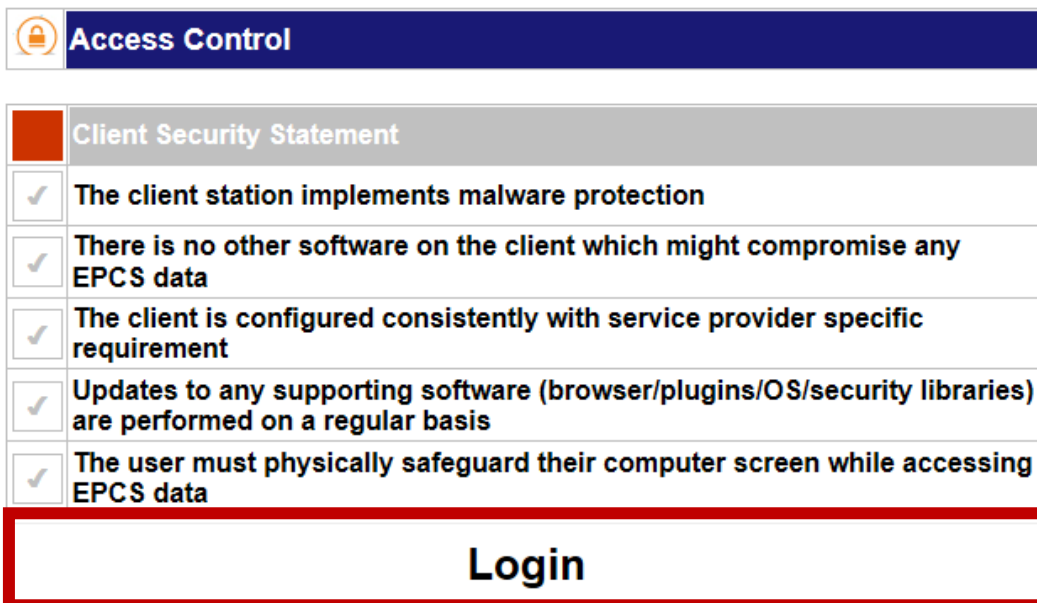


► Associating the Token with the Physician



- Click on 'Apps'
- Click on 'E-Prescribing/EPCS'
- Click on '4 Grant access to EPCS Functions'

The following screen appears:



Read the 'Client Security Statement' and acknowledge by clicking 'Login'

The following screen appears:



At **'Search'** type the first few letters of the physicians name.
Click on **'DEA#>'** to the right of the physician's name.
Click on **'+DEA#'** on the extreme right of the screen.

The following screen appears:

ID	DEA Info			Tokens
93	DEA#: Start date: End date: Default: <input type="checkbox"/> Active: <input type="checkbox"/>	Edit	Del	+ Token

Missing statement

On the above screen:

Click on **'Edit'**

The following screen appears:



SCHWARTZ, M

DEA # - Information

1	DEA	<input type="text"/>	▼
2	StartDate	<input type="text"/>	▼
3	EndDate	<input type="text"/>	▼
4	Default	No	▼
5	Active	No	▼
6	Status	incomplete ▼	
7	Note	<input type="text"/>	

CLOSE WINDOW

Save

As shown above:

1. Click the down-arrow to add the physicians' DEA number
 2. Click the down-arrow to enter the DEA start-date.
 3. Click the down-arrow to add the DEA end-date.
 4. At '**Default**' select '**Yes**'.
 5. At '**Active**' select '**Yes**'.
 6. At '**Status**' select '**Complete**'.
 7. At '**Note**' type a message indicating you verified the physicians' DEA number (e.g., 'Verified DEA number.')
- Click '**Save**'.
- Click '**Close Window**'.

The following screen appears indicating the DEA number and other information was entered:

ID	DEA Info			Tokens
93	DEA#: 7894561 Start date: 1/1/2014 End date: 12/1/2015 Default: ✓ Active: ✓	Edit	Del	+ Token

Verified DEA number.

If you typed the wrong DEA number or the wrong dates click on '**Edit**' to correct. Otherwise click on '**+Token**' to associate the Token with the physician.

The following screen appears:



CLOSE WINDOW

Save

Token Information

1	DEA ID	128
2	Expiration Date	
3	Name On Certificate	
4	OTP UID	
5	Public Key	
6	Serial Number	
7	Account Number	
8	Activation Code	
9	Active	No
10	Status	incomplete
11	Note	


By loading and saving this information I hereby represent by digital signature that I am authorized to prescribe controlled drugs and register this credential/certificate for digitally signing EPCS messages.

Load data from IdenTrust USB token

Click on 'Load data from IdenTrust USB token'.

The following screen appears:

Please choose a certificate

 Name:
Issuer: IGC CA 1
Valid From: 1/11/2015 to 1/10/2017

Click within the box as shown above.

The following screen appears:



CLOSE WINDOW Save

Token Information

1	DEA ID	128
2	Expiration Date	<input type="text"/>
3	Name On Certificate	<input type="text"/>
4	OTP UID	<input type="text"/>
5	Public Key	<input type="text"/>
6	Serial Number	<input type="text"/>
7	Account Number	<input type="text"/>
8	Activation Code	<input type="text"/>
9	Active	No <input type="button" value="v"/>
10	Status	incomplete <input type="button" value="v"/>
11	Note	<input type="text"/>

By loading and saving this information I hereby represent by digital signature that I am authorized to prescribe controlled drugs and register this credential/certificate for digitally signing EPCS messages.

At **OTP UID (One Time Passcode)** type the **email address** associated with your IdenTrust account.
At **'Account Number'** type your account number (top-right on IdenTrust confirmation sheet).
At **'Activation Code'** type your activation code (on 2nd side of IdenTrust confirmation sheet).
At **'Active'** selectt **'Yes'**.
Click **'Save'**
Click **'Close Window'**.

The following screen appears:

ID	DEA Info			Tokens									
93	DEA#: 7894561 Start date: 1/1/2014 End date: 12/1/2015 Default: ✓ Active: ✓	Edit	Del	!	ID	Serial Number/Public key/Misc info	Active	Status					
					68	SN#: 0A01 PK#: MIIF Name on c Acct #: Expiration: 1/10/2017 Activation:	<input type="checkbox"/>	Incomplete	Edit	Del	Approve		
Missing statement													
+ Token													

Verified DEA number.

Click **'Approve'**.



The following screen appears:

CLOSE WINDOW

Choose One	Statement Text
<input checked="" type="radio"/>	ONLY THE SUBSCRIBER OF THE CERTIFICATE SHOULD HAVE EXCLUSIVE USE - THE DIGITAL CERTIFICATE IS YOUR FORM OF IDENTIFICATION, SIMILAR TO YOUR PASSPORT OR DRIVER LICENSE. Under the GSA Certificate Policy, it is IdenTrust responsibility as an Authorized Certificate Authority to revoke the certificate in a case of loss or disclosure of the private key (Passphrase) to anyone other than the subscriber.
<input type="radio"/>	I AM signing S. 522, the Indian Health Care Improvement Act. This bill is not without its faults, but after personal review I have decided that the well-documented needs for improvement in Indian health manpower, services, and facilities outweigh the defects in the bill.
<input type="radio"/>	Statement 1...

ONLY THE SUBSCRIBER OF THE CERTIFICATE SHOULD HAVE EXCLUSIVE USE - THE DIGITAL CERTIFICATE IS YOUR FORM OF IDENTIFICATION, SIMILAR TO YOUR PASSPORT OR DRIVER LICENSE. Under the GSA Certificate Policy, it is IdenTrust responsibility as an Authorized Certificate Authority to revoke the certificate in a case of loss or disclosure of the private key (Passphrase) to anyone other than the subscriber.

Sign Statement

Click **'Sign Statement'**. The following screen appears:

ID		DEA Info						Tokens							
93	DEA#: 7894561 Start date: 1/1/2014 End date: 12/1/2015 Default: ✓ Active: ✓	Edit	Del			!	68	SN#: () PK#: () Name Acct #. Expiration: 1/10/2017 Activation:	3	<input type="checkbox"/>	Incomplete	Edit	Del	Approve	
Missing statement															
Approvals															
User		Type		Date		2FA		Action							
RHS,RHS		Medical director		1/18/2015 12:55:05 PM				Approved		View		Del			
+ Token															

Verified DEA number.

Notice above that the status is **'Incomplete'**. This is because only one person instead of two approved this physician. To have the status changed to **'complete'**, the user should log off and allow the other authorized person to approve.

After the other person logs on: Click **'Apps'**, **'E-Prescribing/EPCS'**, **'Grant Access to EPCS functions'**, **'Login'**, select the proper doctor, and click **'DEA#'**.

Click on **'Approve'** and **'Sign Statement.'**

The Status is set to **Complete**.

Log off. Have the other authorizing person log in. Repeat pages 6 through **'DEA#'** on page 7.

Click **'Approve'**. Click **'Sign Statement.'** Click **'Complete the Token Registration'**. The status is set to **'Complete'**.



► Quick Guide

Ordering a Token from IdenTrust

<http://www.IdenTrust.com/igc/rhs>

Administrator and Medical Director complete and sign form on page 4 and send it to RHS.
Fax: 718-534-3142, or eMail: HZelcer@ReliableHealth.com

Define the responsibility of each user (i.e., Administrator, Medical Director or Physician)

Click **Admin**

Click **System Control**

Click **User Manager**

Click **General**

Locate the physician: At **Search** type a few letters of the user's name.

When you see the name, click on the id number to the left of the name.

At **9** Select **Yes** if this person has the right to grant EPCS access to physicians.

At **10** select the type of medication this person may prescribe: **All, Non-controlled, or Controlled only**. If this is an administrative person (not a physician) select **Not Allowed**.

At **11** select **Yes** if this person is the facility's Administrator.

At **12** select **Yes** if this person is the facility's Medical Director.

At **13** select **Yes** if this person is a System Administrator.

Click **Save**.

Associating the Token with the Physician

1. Click **Apps**

2. Click on **E-Prescribing/EPCS**

3. Click on **4 Grant access to EPCS Functions**

4. Click **Login**

5. At **Search** type a few letters of the user's name.

6. Locate the physician

7. Click on **DEA#>**

8. Click on **+DEA#**

9. Click **Edit**

10. Complete the DEA information and click **Save**

11. Click **Close Window**

12. Click **+Token** to assign a Token to the physician.

13. Click on **Load data from IdenTrust USB token**.

14. Click on the proper Token

15. At **OTP UID (One Time Passcode)** type the **email address** associated with your account

16. Type your **Account Number**

17. Type your **Activation Code**

18. At **Active** select **Yes**

19. Click **Save**

20. Click **Close Window**

21. Click **Approve**

22. Click **Sign Statement**

23. Log off

24. Have the other authorizing person log in:

Repeat steps 1 – 7.

Click **'Approve'**

Click **'Sign Statement.'**

Click **'Complete the Token Registration'**.