

## Identity Proofing for Electronic Prescribing of Controlled Substances

Identity Proofing verifies that the prescriber is who they say they are in order to protect them from fraudulent activities and prescribing. This is a requirement for any prescriber to be able to electronically send controlled substances.

### Initiating Identity Proofing – EPCS Coordinator

The EPCS Coordinator is essentially the gatekeeper for controlled-substance prescribing. They will see all prescriptions created/sent in a DoseSpot Admin Console and they will have the ability to approve and deny the ability to send controlled substances to prescribers.

1. When the initial account is created within DoseSpot, the EPCS Coordinator will be emailed information on how to access the DoseSpot Admin Console. It will include a link and a temporary password that the EPCS Coordinator will need to log into the DoseSpot Admin Console.
2. In your browser, please browse to <https://pss.dosespot.com/admin>.
3. Enter your EMAIL ADDRESS and PASSWORD to log in.
4. Once logged in, scroll to the bottom of the page to the list of DoseSpot users.
5. Find the prescriber that you wish to activate EPCS for and click EDIT beside their name.
6. Find the section titled EPCS FUNCTIONALITY.
7. Check the IDENTITY PROOFING checkbox.
8. A section will appear stating how many times that the clinician/prescriber has attempted the Identity Proofing (or IDP) process.
9. Click the SAVE button.

**NOTE:** *If the EPCS Coordinator has inadvertently lost this email, they can gain access to the DoseSpot Admin Console by visiting <https://pss.dosespot.com/admin> and clicking the FORGOT PASSWORD link.*

### Identity Proofing - Prescriber

1. The prescribing physician will log into ShareNote.
2. Browse to the CLIENT MANAGER.
3. Select any CLIENT.
4. In the CLIENT'S PROFILE, click on any CLIENT NAME.
5. Select ELECTRONIC PRESCRIPTION from the left-hand menu.
6. Click the green OPEN ELECTRONIC PRESCRIPTION SYSTEM button.

**NOTE:** *At this point, the prescriber can electronically prescribe and send non-controlled substance prescriptions. They can electronically prescribe and print controlled substance*

*prescriptions, but they will not be able to electronically send them until all steps below have been completed.*

7. You will see a blue window that states, "Please complete the following agreement(s) in order to being using DoseSpot:"
8. To initiate Identity Proofing, the prescriber will need to click the orange, "Identity Proofing Agreement," button.
9. A small modal window will open with information that the prescriber will then need to read and a form that will need to be filled out.

**a. Acknowledgment Checkbox**

The prescriber will need to read the information noted beside the checkbox and check it if he/she agrees to it. (If not agreed to, the prescriber will not be able to submit controlled substances electronically but will still be able to print them.)

**b. Fill Out Form**

The form asks for personal information, including the prescriber's Social Security Number and a credit card number.

**\*\*Ensure that PHONE TYPE is set to "Mobile", that your current phone number is entered correctly (numbers only, no parenthesis, periods, or dashes), and that you check the "This is my mobile number." Checkbox.**

***NOTE:*** None of this information is stored by ShareNote or DoseSpot, nor are any charges placed on the credit card. This information is only used to be shared with Experian to verify that the prescriber is who they say they are. This is done for the prescriber's protection from fraudulent activity.

10. The prescriber will then click the NEXT button to continue.
11. Once the previous step is completed, you will receive a text message at the provided number containing a one-time use password. This password will expire in seven (7) days if not used.
12. Enter in the texted password into the One Time Password field.
13. Click NEXT button to continue.
14. Experian will then provide three (3) or four (4) questions that need to be answered by the prescriber to prove that they are whom they say they are.
15. After answering the questions, click the NEXT button to continue.
16. You should be notified of a successful verification at this point from Experian in the window.
17. Click the SET PIN link underneath the verification message.
18. You will be asked to create a FOUR (4) DIGIT PIN. Please create a PIN that you will remember as you will use this PIN every time you need to send a controlled substance prescription electronically.

19. Click the OK button.

The prescriber has now completed the first step of Identity Proofing.

The next step is for the EPCS Coordinator to complete and take just a moment.

### Initiate EPCS/TFA Activation – EPCS Coordinator

1. In your browser, please browse to <https://pss.dosespot.com/admin>.
2. Enter your EMAIL ADDRESS and PASSWORD to log in.
3. Once logged in, scroll to the bottom of the page to the list of DoseSpot users.
4. Find the prescriber that you wish to activate EPCS for and click EDIT beside their name.
5. Find the section titled TFA Authentication.
6. Check the EPCS/TFA ACTIVATION checkbox.
7. Select DUO MOBILE in the TFA TYPE drop down list when it shows after completing STEP
8. Click the SAVE button.

The EPCS Coordinator has now completed their part and the prescriber can move onto their final step.

### DUO Mobile Activation - Prescriber

The DUO mobile app is used as a part of the two-factor authentication (TFA) process during the EPCS/TFA Activation, and it is required each time a prescriber sends an electronic prescription for a controlled substance (the latter is to ensure that only the authorized prescriber is the sender).

Once the EPCS Coordinator completes their part above, the prescriber can now continue with the following steps to complete Identity Proofing.

1. Log into ShareNote.
2. Browse to the CLIENT MANAGER.
3. Select any client.
4. In CLIENT PROFILE, click on the ELECTRONIC PRESCRIPTION link in the left-hand menu.
5. Click the green OPEN ELECTRONIC PRESCRIPTION SYSTEM button.
6. Once the DoseSpot window opens up, the prescriber will see an EXCLAMATION POINT icon.
7. Click the EXCLAMATION POINT icon.
8. A pop-up will appear, displaying an ACTIVATE TFA link. Click this link.
9. A DUO Mobile prompt will appear asking you to verify the mobile number of the device you wish to use for DUO Mobile.
10. Enter your MOBILE NUMBER.

11. Check the TEXT MESSAGE AGREEMENT checkbox.
12. Click the SEND DUO ACTIVATION button.
13. The prescriber will receive two text messages from DUO Mobile.
  1. **Text One**  
This text will provide a quick link to download the DUO Mobile app if you have not already done so.
  2. **Text Two**  
This text will contain a link allowing you to use DUO Mobile with the DoseSpot application.
14. If you have not done so, please click the link in the first text and download the DUO Mobile app to your mobile device.
15. Once downloaded and installed, click the link in the second text.
16. You will see DOSESPOT listed in the DUO Mobile app. The six (6) digit number sequence is your TFA CODE. The REFRESH arrows will generate a new code when tapped. You will need to generate a new code every time you are prompted for a TFA Code in the DoseSpot application.
17. Back in the DoseSpot application, you will see a window titled TFA ACTIVATION.
18. Your REFERENCE NUMBER should be prepopulated.
19. Input the TFA Code found in the DUO Mobile app.
20. Input your PIN. (If you have not yet set your PIN, you may click the SET PIN button to do so, otherwise, move to the next step.)
21. Click the SAVE button.

You are now able to begin electronically prescribing controlled substances in ShareNote and DoseSpot!

### Important Notes

- If you have any items that you need help with, please create a Help Desk Ticket from within ShareNote. DO NOT contact DoseSpot as they will redirect you back to ShareNote support which could result in delays.
- If you would like more information on electronic prescriptions in ShareNote, please visit our FAQ at <http://support.sharenote.com/category/faq/2>.
- If you would like to add a PROXY USER to your organization (PROXY USERS can view the DoseSpot system, prepare prescriptions, add preferred pharmacies, and add/view medication/allergy histories for patients without being able to send or print subscriptions.), please create a Help Desk Ticket in ShareNote to let us know that you would like a PROXY USER added and let us know which of your staff you would like to set as PROXY USERS.

(There is no limit to the amount of proxy users you may have.)

- Prescribers will not need a USERNAME/PASSWORD to access DoseSpot. ShareNote takes care of this when the prescriber clicks the OPEN ELECTRONIC PRESCRIPTION SYSTEM button in any CLIENT PROFILE behind the scenes.