

ScriptSure ERX Partner Provider Setup Guide

Introduction

The purpose of this guide is to help healthcare providers get started with ScriptSure setup. Setup is a ONE-TIME process that should take about 15 minutes to complete and includes provider identity verification.

Why Identity Verification?

Providers are required to perform Identity verification to be compliant with DEA regulations for electronic prescriptions for controlled substances (EPCS). It is important that providers perform their own identity verification.

Daw Systems has partnered with ID.me for the identity verification process. ID.me's DEA-compliant identity verification allows healthcare providers to verify their identity one-time and create credentials they can use to securely issue electronic prescriptions for controlled substances from ScriptSure.

Once a provider has verified their identity with ID.me, that person will never have to re-verify their identity again across any organization where ID.me is integrated.

ID.me is a trusted digital identity network and is the first credential service provider in the United States to become certified to NIST 800-63-3. ID.me serves over 300 organizations including healthcare systems, government agencies, financial institutions, and nonprofits.

What You'll Need

Before getting started, providers should have on-hand: an **email** account they have access to, a **smartphone or tablet**, and a government-issued **photo ID**. Providers will be asked to enter their Social Security number.

Have Questions? Need Help?

Troubleshooting Tips are on the last page of this document. Contact <u>support@dawsystems.com</u> or 866-755-1500 x2 with any questions or issues during setup.

IMPORTANT NOTE: YOU CAN ONLY HAVE <u>ONE</u> ID.ME ACCOUNT. IF YOU HAVE HAD AN ID.ME ACOUNT BEFORE, YOU WILL NEED TO USE THAT ACCOUNT TO START THE ID.ME PROCESS.



STEP 1: *Important* Pick your browser

Use GOOGLE CHROME or APPLE SAFARI web browser when signing up. You may encounter issues with advancing through screens if you do not use one of these browsers.

STEP 2: Find your Email Invite.

Check your inbox for an email titled INVITE TO SCRIPTSURE from <u>accounts@dawsystems.com</u> or your EHR company. Be sure to check JUNK/SPAM/OTHER folders within your email.

STEP 3: Click Set up account button in your email

NOTE: If a new browser window opens when you click the Set up account button, ensure you remain in Google Chrome or Apple Safari. If the new window opens in a different browser, copy the URL (website address) into Google Chrome or Apple Safari before you proceed.





STEP 3: Create ScriptSure Account

- 1. **Eligibility**: Begin by entering in your personal NPI (do not use an institutional NPI or anyone's but your own). Check I agree to terms and the reCaptcha box and click Next.
- 2. User Info: Enter Name and email information (and other optional information as desired) and click Next

Eligibility (1 of 6)	User (2 of 6)		
	General		
Create ScriptSure Account	First Name*	Last Name *	
Please only enter Personal NPI - you cannot use a facility or corporate NPI here: You must use your Personal NPI *	Required Middle Name	0 / 35 Required Suffix (MD, RN, NP)	0/35
VPI is Required	Time Zone * US/Eastern	0/35	0 / 10
I agree to TERMS OF SERVICE PRIVACY POLICY CODE OF CONDUCT	Contact Login Email *		
By signing up, you agree to our Terms of Service, Privacy Policy and confirm you are at least 18 years old	Required Confirm Email *		
l'm not a robot	Required Cell Phone () [_]		
	Cell phone is not red receive text alerts a	quired. Entering your cell phone v bout pending prescriptions.	vill allow you to
$NEXT \rightarrow$	← васк		NEXT -

- 3. Confirm Email: Go to your email and confirm your email
- 4. Password: Create and Confirm a Password to Access ScriptSure

3	4
Your email address <u>demo40@scriptsure.com</u> has been registered for a ScriptSure E-Prescribing account	Password (4 of 6)
Click the confirm my email button below to take the next step:	Create Login Password
Confirm My Email If you have any questions, feel free to <u>email our customer success</u> team. Thanks, The ScriptSure Team t If you're having trouble with the button above, copy and paste the URL below into your web browser.	New password * Password Confirm * Required An UPPERCASE letter A lowercase letter
	 At least one special character (!%#) At least one number Password must be at least 8 characters long Be sure to save your password. You will need it when logging into ScriptSure.



- 5. Identification: Confirm your NPI, DEA, and State License, & enter any other credentials desired
- 6. Practice: Enter the Account details and Click Complete Signup
 - This includes the practice/account name and practice nickname (this can be the same as the practice name or shortened to show smaller on screen.) The practice/account full address, phone number and fax number.
 - Note: this is the information for your practice location and will transmit to the pharmacy and function as the header of the prescriptions.

Practice (6 of 6)
Account Details
Practice Name* Name to be printed on prescriptions and reports 15/35
Practice Nickname*
Name to be presented on screen 15/35 only
Address
Address Line 1 * Address Line 2
4/35 0/35
Zip * City * State *
5 / 5 9 / 35
Contact
Phone Number * Fax Number *
e rate

7. End User License Agreement: Review and accept the EULA Terms and License Agreements

0	End User License Agreement
Terms of Use	VIEW
Code of Conduct	VIEW
Privacy Policy	VIEW
You must agree to	all terms and policies above in order to use Scriptsure. Please read each.
	I DISAGREE I AGREE TO ALL TERMS



- 8. **ScriptSure Setup**: You will now be in ScriptSure, and the application will show any required steps that must be completed
 - a. **ID Proof**: The first is ID proofing. Each provider must complete this in order to continue. Click the Already Have an ID.me Account or Begin ID proofing Process to create one. (see next page for more details on ID Proofing)

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Setu	
ి	ID Proof
Ye	EQUIRED ou must complete identity proofing process ofore you can prescribe (Internal Ref: 700) CLICK HERE FOR INSTRUCTIONS
4	REATE AN ID.ME ACCOUNT AND BEGIN ID PROOFING
4	REATE AN ID.ME ACCOUNT AND BEGIN ID PROOFING

NOTE: You can only have one Identity proofed ID.me account; if you have ID.me, even if you used that with a different application provider, you should use that to login to ID.me. You can always associate a new email address to that account from within the ID.me profile.

If you have other required items to complete, they will be indicated on- screen. Below are examples of additional items you may need to perform:

- b. Sign BAA
- c. Setup Administrator User

Business Associate Agreement (BAA)	C Setup Administrator User
REQUIRED The HIPAA Privacy Rule requires Covered Entities (medical providers) to have a signed Business Associate (BA) that stores, uses or discloses Protected Health Information such as patient data. This must be done for EACH practice location. As we are your BA and ScriptSure Cloud ERX will store, use and disclose patient data to pharmacies, you must sign a BAA to proceed. (Internal Ref: 700)	3 REQUIRED The DEA requires every E-Prescribing account to have a minimum of 1 provider and one supporting user who is a full administrator. This is required even if you are a solo-practitioner. The supporting user invited can be an employee, manager, colleague, relative or friend. This user will receive an email to setup their access and must login and APPROVE the provider for E-Prescribing ONE- TIME! (Internal Ref: 900) LEARN MORE
	INVITE ADMINISTRATOR



ScriptSure Cloud ERX

REV. 11/2022

STEP 4: Create an account (or Sign In) with ID.me

When you click "Setup Account", you will be brought to ID.me's Sign up (or Sign in) page.

IMPORTANT: If you already have an ID.me account, simply Sign in to your existing ID.me account.

Create an account by signing up. Enter an email you have access to, set a password, accepting the terms of service and then, select Sign Up.

NOTE: If you have an existing ID.me account, DO NOT create a new ID.me account. Don't worry, you will be able to link your existing ID.me account to Daw Systems / ScriptSure.

	or <u>sign into your accour</u>
Email	
Enter your em	ail
Password	
Enter your pas	ssword
Confirm password	d
Confirm your	password
	me <u>terms of service</u> and <u>privacy policy</u>
	ume <u>terms of service</u> and <u>privacy policy</u> cribe to ID.me offers and discounts Sign up
	cribe to ID.me offers and discounts
	cribe to ID.me offers and discounts Sign up



REV. 11/2022 STEP 5: Confirm your email

Confirm your email address by logging in to the email used to sign up for ID.me and click the Confirm your email button. Follow the on-screen prompts (shown below) if you have any issues finding or confirming your email.

NOTE: If you signed in to your existing ID.me account, you will not be required to perform email confirmation.

CONFIRM YOUR EMAIL ADDRESS	Rø
	Welcome!
We sent an email to	Thanks for creating an ID.me account!
If you cannot find the email, please check your spam folder. It can take up to 10 minutes to receive the email.	ID.me simplifies how you verify and share your identity online, while helping keep your information safe.
receive the email.	You can confirm your email address by clicking the link below.
	Confirm
	Please note: This link will expire in 15 minutes.
After your email is confirmed, return to this page to continue.	Can't click the button in this email?
Didn't receive the email? Send it again	Copy this code and enter it in your browser to complete the confirmation.
	125562
Can't click on the button in your email?	
Enter the 6-digit code from the email below.	
	You're receiving this email because you signed up for an ID.me account on 12/21/2021 at ScriptSure.
Continue	Questions? We're here to help. Visit ID.me Support >
	Stay in Touch
Why do I need to confirm my email?	y (f) (in)

A new browser tab will open to notify 'Your email has been confirmed!'



NOTE: YOU MAY NOW CLOSE THIS CONFIRMATION TAB. To continue verification with ID.me, navigate to the tab in your browser you were working in originally to continue (see red arrow pointing to the other tab).



Step 6: Secure your Account

Secure your ID.me account with multi-factor or two-factor authentication (MFA/2FA). Multi-factor authentication adds an additional layer of security to your account by associating something that you have to your account. For future ID.me logins (and for e-prescribing from within ScriptSure), you will authenticate with the MFA/2FA method and/or device you setup in this step. Be sure to use a device you plan to have on your person when e-prescribing.

NOTE: ScriptSure recommends Push Notifications. Push Notifications appear as a banner on your device upon sign in that you simply tap or 'push' to authenticate yourself and authorize your event and is a very swift authentication method. You may also choose from the other methods listed.

SECURE YOUR ACCOUNT
With multi-factor authentication (MFA), even if someone guesses your password, they won't be able to sign in as you.
Choose an option below to set up multi-factor authentication
Push Notification
Approve sign-ins via push notifications sent to the ID.me Authenticator mobile app.
Soloct
**** Code Generator Application
Generate verification codes via code generator apps like ID.me Authenticator .
Select
FIDO Security Key
Use a physical security key (insert or tap) with your device (supported browsers only).
Select
NFC-Enabled Mobile Security Key
Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.
Select

No I don't want to secure my account at this time





Step 7: Choose app download method

If you choose Push Notification or Code Generator, you will be prompted to **download the ID.me Authenticator app** on your smartphone or tablet. Follow the on-screen and on-device prompts to download the app. If you choose FIDO key, follow the on-screen prompts for setup.

NOTE: If you are planning to use your smartphone as your authentication device, choose Text Message to receive the download link and enter the phone number of the smartphone you will use. If you are planning to use a tablet device, choose to receive the download link via email.





STEP 8: Complete ID.me Authenticator app setup

Follow desktop and smart device prompts to download and configure the ID.me Authenticator. You will receive a text message or email with a link to download the ID.me Authenticator app. Open your text messages/email and click the link to get started with app download. Follow on-device prompts to complete setup. Be sure to click or tap on the green "Yes" to complete your setup (if you chose to set up Push Notifications).

NOTE: If you chose to set up a FIDO key, follow on-screen prompts to complete setup.



After downloading the app and completing your MFA/2FA set up, you will be notified that "YOUR ACCOUNT IS SECURE".



STEP 9: Generate Recovery Code

Generate a recovery code in case you lose access to your MFA/2FA device for swiftest account recovery. Follow on-screen prompts to copy or download your recovery code.

Once you have copied down or stored the recovery code, click Continue.





REV. 11/2022 Step 10: Verify your Identity

Choose the method you prefer to verify your identity. You will be asked to prove that you are who you say you are by providing evidence such as uploading a photo ID and taking a live selfie. You will also be asked to enter your SSN. Information entered into ID.me's workflow is encrypted while at rest and in-transit and completing the verification process will not hurt your credit score.

NOTE: If asked to enter a phone number, attempt to enter a phone number for a device that is in your possession and may be associated with you in financial records. This device does not have to be the same device utilized for MFA/2FA.

Choose verification method, such as a driver's license:





Submit Photos: Select option 1 or 2 below and follow the prompts to submit your photos.

-	D.me + ScriptSuRe.
	VERIFY YOUR IDENTITY
2	Take a photo with my device
2	Take a photo with my device
2	Your mobile device must have a
2	Your mobile device must have a camera and a web browser.

1. **Upload an image**: This option will allow you to upload a file and can be used if you have a saved picture of your document.

OR

2. **Take a photo with my device**: This option will allow you to take a picture with your phone.

a. Enter your cell phone number and click "Continue".

b. Then check your cell phone for a text message. (see next page for next steps)

D.me + clev Systems. Inc	WAITING FOR YOUR PHOTOS
VERIFY YOUR IDENTITY	
Take photos with my device Enter a mobile phone number, and we'll text you a link to take photos of your driver's license or state ID. Enter your mobile phone number	
+1 (878) 454-3254	We sent a text message to (878) 454-3254. Please click the link in the text message and follow the instructions to tail our photos.
camera and a web browser.	This screen will automatically refresh once your photos are received.
Continue	С
<u>Go back</u>	Didn't receive the text message? Send it again.



On your cell phone:

- c. Click the link in the text message.
- d. Click "Take a photo" to take a picture of the front of your document.
- e. Select "Take Photo"
- f. Align your ID in the box and hold to capture the photo.
- g. Repeat the process for the back side of your ID. When the front and back have been completed, hit "Continue".





When you see the message below, go back to your other browser to complete the next steps.



Enter your social security number and click "Continue".

D.me +	dew System
CONFIRM YOUR IDE	NTITY
Enter your Social Secur	ity numbe
The Social Security number is use identifier to confirm identity. This	ed as a unique
The Social Security number is use	ed as a unique
The Social Security number is use identifier to confirm identity. This your credit score.	ed as a unique will not affect



Take a video selfie:

- a. Click "Take video Selfie"
- b. Follow the prompts to take the selfie. (See helpful tips below)
 - Take the selfie / video selfie "straight on", and not at an angle.
 - Use portrait orientation.
 - Make sure your whole face is visible.
 - Turn off the flash on your camera.
 - Make sure there is no glare.
 - Make sure you are in a well-lit room.
- c. Click "Continue" when it shows it was successful.





Verify Medical Credentials (NPI/DEA): Enter your NPI, State, and DEA number, and click Continue. Confirm your information, select the Provider Type, and click "Continue.

rmation pertaining to
~
Continue

STEP 10: Successful Identity Verification

If verification is successful, follow on-screen prompts to continue to the next step of the workflow. Go to STEP 12 of this guide.

STEP 10(a): DAW SYSTEMS, INC. application or team reviews and then does a final approval of the user and the user is registered for ERX on the Surescripts network.



Step 11: Unsuccessful self-serve verification

If ID.me is not able to verify your identity via self-serve workflow, a real person from ID.me's team may need to assist in completing your verification. About 3-5% of providers who complete ID.me's self-serve workflow need to talk with a real person on ID.me's team to complete their identity verification. ID.me's in-person service to complete identity verification is completed virtually, via video chat.

GET STUCK ALONG THE WAY?

Talk to a real person! At ID.me we have a No Identity Left Behind mission. Just in case you get stuck along the way, we are here to help. Connect with an ID.me team member via video call and we will verify your identity in moments.

Not all who see an error code or RETRY button will be required to perform a video session to complete identity verification. Users are required to RETRY verification once before being presented the option to connect to an ID.me team member.

Retry

If ID.me is unable to verify your identity via self-serve workflow, you will see a RETRY button. Select RETRY to proceed. You may choose a different verification method than on your previous attempt or attempt the same method again. You must RETRY verification to continue.

We couldn't verify your informa	tion
We're sorry, but we are unable to verify yo medical provider status using the informat provided. Please complete all information requested on this form and we will dentact y soon as possible to assist with your reque If you need assistance or have other questi	tion on ou as est.
please visit ID.me Support.	UIIS,

If the retry is successful, follow on-screen prompts to proceed to the next step of the workflow.

If the retry is unsuccessful, you will be presented with the option to VERIFY IDENTITY VIA VIDEO CALL or to Retry Verification.



Verify via Video Call

Select VERIFY IDENTITY VIA VIDEO CALL to connect to a certified ID.me team member, called a Trusted Referee, to complete your verification.

Completing your Virtual In-Person identity verification should be simple and fast.

Once you are in the video call, it should only take a few minutes to verify your identity.

To Get Started, follow on-screen prompts to upload additional documents and take a Selfie.

After your documents and Selfie are uploaded, you will be connected to an ID.me team member to perform Virtual In-Person identity verification.

	in the
D.me + ScriptSuRe	BOOK A FREE LIVE VIDEO IDENTITY VERIFICATION SESSION
YOU'RE ALMOST THERE	
Complete identity verification Have your documents inspected virtually.	Complete your identity verification via a Trusted Referee in three easy steps
Connect with a trained and certified ID.me Trusted Referee on a secure, two-way video call.	1) Confirm your personal information
Verify identity on a video call	2) Select and upload identification documents View.list.of.eligible.documents
or retry the previous steps	3) Attend the live video web session
or redy the previous steps	Get your identity verified in 15 minutes or less!
Why am I seeing this?	TRUSTID REFERES ARE TRANKE AND CERTIFIED TO INSPECT YOUR IDENTIFICATION DOCUMENTS AND VERIFY YOUR IDENTITY DURING YOUR ONLINE SESSION.
	Go Back Get Started
	What is IDme? Terms of Service Privacy Policy

NOTE: The document upload and Selfie are required to proceed to the video session.



If you don't have the documents needed on-hand, use the SAVE SESSION AND EXIT button at the bottom of the screen to save your spot in the workflow. You will be sent an email with a link to click in order to return to the same spot in the workflow (with the documents and/or selfie you have uploaded saved).

Documents ready? Click the link included in your Save Session and Exit email to return to the same spot and continue the workflow.





STEP 12: Complete ID.me's workflow

Complete ID.me's workflow by selecting ALLOW, authorizing ScriptSure to receive your verified identity information.







Step 13: You will now be navigated back to the ScriptSure program windows where you can complete any remaining next steps

Sign BAA

• A Business Associate Agreement (BAA) must be signed. Click "start" to review and sign the Agreement.

Business Associate Agreement (BAA)	Setup Administrator User
2 REQUIRED The HIPAA Privacy Rule requires Covered Entities (medical providers) to have a signed Business Associate Agreement with any Business Associate (BA) that stores, uses or discloses Protected Health Information such as patient data. This must be done for EACH practice location. As we are your BA and ScriptSure Cloud ERX will store, use and disclose patient data to pharmacies, you must sign a BAA to proceed. (Internal Ref: 700)	3 REQUIRED The DEA requires every E-Prescribing account to have a minimum of 1 provider and one supporting user who is a full administrator. This is required even if you are a solo-practitioner. The supporting user invited can be an employee, manager, colleague, relative or friend. This user will receive an email to setup their access and must login and APPROVE the provider for E-Prescribing ONE- TIME! (Internal Ref: 900) LEARN MORE
START	INVITE ADMINISTRATOR

• Enter signer and practice info and Click SIGN BAA and Confirm signing.

Signer						
						٦
First Name *		st Name "		Title '		
Kristy	A	leman		Cto		
	6/35		6/35		3/35	
Email*						
Demo40@scrip	stsure.com					J
AA ng this document	you are attesting t	hat you have leg	al authority to	sign contracts or	n Aesthetic Rec	:01
	you are attesting t	hat you have leç	al authority to	sign contracts or	۲	or
	you are attesting t	hat you have leç	al authority to	sign contracts or	Aesthetic Rec	100
g this document	you are attesting t	hat you have leg State "	al authority to	sign contracts or	۲	:01
g this document			gal authority to	sign contracts or	۲	:01
Zip*	Dity*	State* AK	al authority to	sign contracts or	۲	or
Zp* (44306	^{Dity*} Akron	State* AK	al authority to	sign contracts or	۲	
Zip" (44306 575	Dity" Akron 57:	State ' AK 35	Ť		۲	100
Zp* 44306 5/5 Please click the V	^{Dity*} Akron	State * AK 35 and read the docum	vent. Once you have	re completed	۲	



Step 14: You will now be navigated back to the ScriptSure program windows where you can complete any remaining next steps

EPCS Requests

You can approve any providers and users that need to prescribe controlled substances in the application.



STEP 15: You can now login to ScriptSure at <u>www.scriptsure.com</u> using your username (your email address) and the password you set.

Troubleshooting:

Questions about Identity Verification?

See ID.me's frequently asked questions (FAQ) pages for quick tips on <u>EPCS or eRX - How do I verify my</u> identity for EPCS or eRx? and <u>Setting up push notification multi-factor authentication (MFA)</u>

Questions or Issues during Setup?

For help with any issues during setup, contact support@dawsystems.com or call 866-755-1500 x2