

# ScriptSure ERX Partner Provider Setup Guide

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## 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 5-10 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 [support@dawsystems.com](mailto:support@dawsystems.com) or 866-755-1500 x2 with any questions or issues during setup.

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

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## STEP 1: \*Important\* Pick your browser

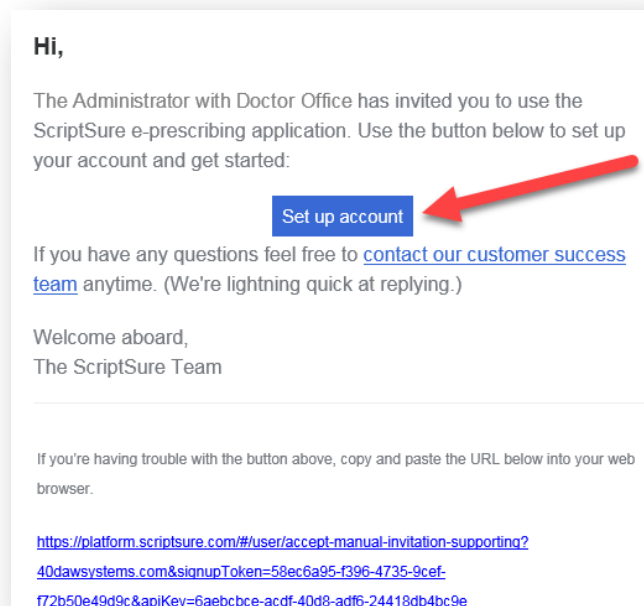
Use GOOGLE CHROME or APPLE SAFARI web browser when signing up. You may encounter issues with advancing through screens if you do not use one of these browsers.

## STEP 2: Find your Email Invite.

Check your inbox for an email titled **INVITE TO SCRIPTSURE** from [accounts@dawsystems.com](mailto:accounts@dawsystems.com) 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

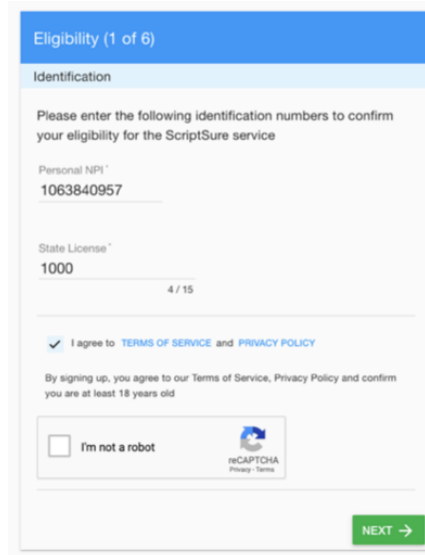
NOTE: If a new browser window opens when you click the Set up account button, ensure you remain in Google Chrome or Apple Safari. If the new window opens in a different browser, copy the URL (website address) into Google Chrome or Apple Safari before you proceed.



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## STEP 3-(1): Begin the Eligibility Steps

Begin by entering in your personal NPI (do not use an institutional NPI or anyone's but your own). Also enter your State Medical License number. Check I agree to terms and the reCaptcha box and click Next.



The screenshot shows the 'Eligibility (1 of 6)' form. It has a blue header with the title. Below the header is a section titled 'Identification'. The instructions say: 'Please enter the following identification numbers to confirm your eligibility for the ScriptSure service'. There are two input fields: 'Personal NPI\*' with the value '1063840957' and 'State License\*' with the value '1000'. Below these is a checkbox for 'I agree to TERMS OF SERVICE and PRIVACY POLICY' which is checked. A note states: 'By signing up, you agree to our Terms of Service, Privacy Policy and confirm you are at least 18 years old'. There is a reCAPTCHA box with the text 'I'm not a robot' and a 'NEXT' button with a right arrow.

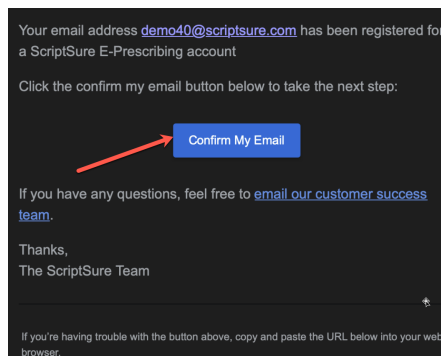
Step 3-(2): Enter Name and email information (and other optional information as desired) and click Next



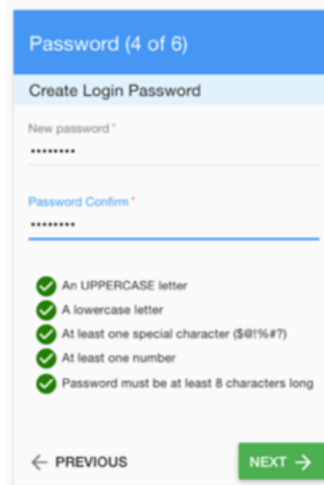
The screenshot shows the 'User (2 of 6)' form. It has a blue header with the title. Below the header is a section titled 'General'. It contains fields for 'First Name\*' (Kristy), 'Last Name\*' (Aleman), 'Middle Name' (empty), and 'Suffix (MD, RN, NP)' (empty). There are also fields for 'Time Zone\*' (US/Central) and a 'Time Zone' dropdown menu. Below the 'General' section is a section titled 'Contact'. It contains fields for 'Login Email\*' (demo40@scriptsure.com), 'Confirm Email\*' (demo40@scriptsure.com), and 'Cell Phone' (empty). At the bottom, there is a 'BACK' button with a left arrow and a 'NEXT' button with a right arrow.

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## Step 3-(3): Go to your email and confirm your email



## Step 3-(4): Create and Confirm a Password to Access ScriptSure



**Password (4 of 6)**

Create Login Password

New password \*

\*\*\*\*\*

Password Confirm \*

\*\*\*\*\*

- ✓ An UPPERCASE letter
- ✓ A lowercase letter
- ✓ At least one special character (\$@!%#?)
- ✓ At least one number
- ✓ Password must be at least 8 characters long

← PREVIOUS      NEXT →

## Step 3-(5): Confirm your NPI and DEA & enter any other credentials desired:



**Identification (5 of 6)**

Identification

Please enter all the identification numbers you require to be present on your prescriptions

WARNING: DEA is required if you plan to send controlled prescriptions

NPI\*      DEA

1063840957      af1234567

State License (Optional)      State Controlled (Optional)

1000      4 / 15      0 / 15

Delex (Optional)      0 / 10

← PREVIOUS      NEXT →

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## Step 3-(6): 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.

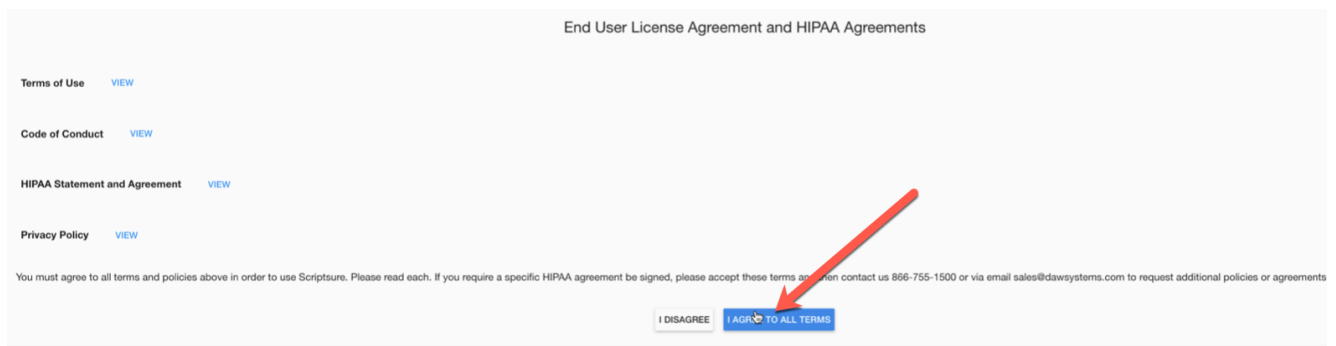


The screenshot shows a form titled "Practice (6 of 6)" with the following sections and callouts:

- Account Details:**
  - 1: Practice Name\*
  - 2: Practice Nickname\*
- Address:**
  - 3: Address Line 1\*
  - 4: Address Line 2\*
  - 5: Phone Number\*
  - 6: Fax Number\*
- Contact:**
  - 7: COMPLETE SIGNUP button

Navigation: PREVIOUS (left arrow), COMPLETE SIGNUP (green button with checkmark)

## Step 3-(7): Accept the EULA Terms and HIPAA Agreements



End User License Agreement and HIPAA Agreements

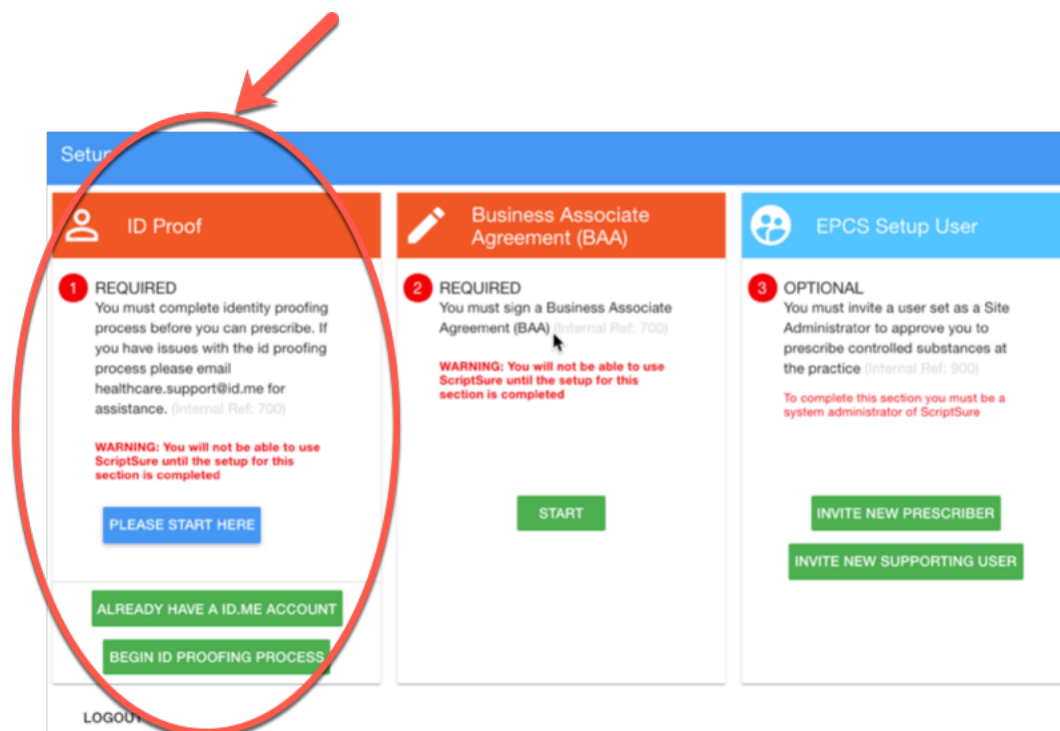
- Terms of Use [VIEW](#)
- Code of Conduct [VIEW](#)
- HIPAA Statement and Agreement [VIEW](#)
- Privacy Policy [VIEW](#)

You must agree to all terms and policies above in order to use ScriptSure. Please read each. If you require a specific HIPAA agreement be signed, please accept these terms and then contact us 866-755-1500 or via email sales@dawsystems.com to request additional policies or agreements

I DISAGREE | **I AGREE TO ALL TERMS**

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Step 3-(8): You will now be in ScriptSure and the application will show any required steps that must be completed. The first is ID proofing. Each provider must complete this in order to continue. Select either Already Have a ID.ME Account or Begin ID proofing Process




#### 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.



**Sign Up** [or sign into your account](#)

**1** Email  
Enter your email

**2** Password  
Enter your password

**3** Confirm password  
Confirm your password

I accept the ID.me [terms of service](#) and [privacy policy](#)

I want to subscribe to ID.me offers and discounts

**4** Sign up

Or sign in with

Facebook Google LinkedIn

[View more sign up options >](#)

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

## 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



We sent an email to \_\_\_\_\_  
Please check your inbox and find the confirmation  
email we've sent you.

This email's subject line will read, "ID.me - Please  
Confirm Your Email." If you cannot find the email  
within your Inbox, please check your Spam folder.  
It can take up to 10 minutes to receive this email.

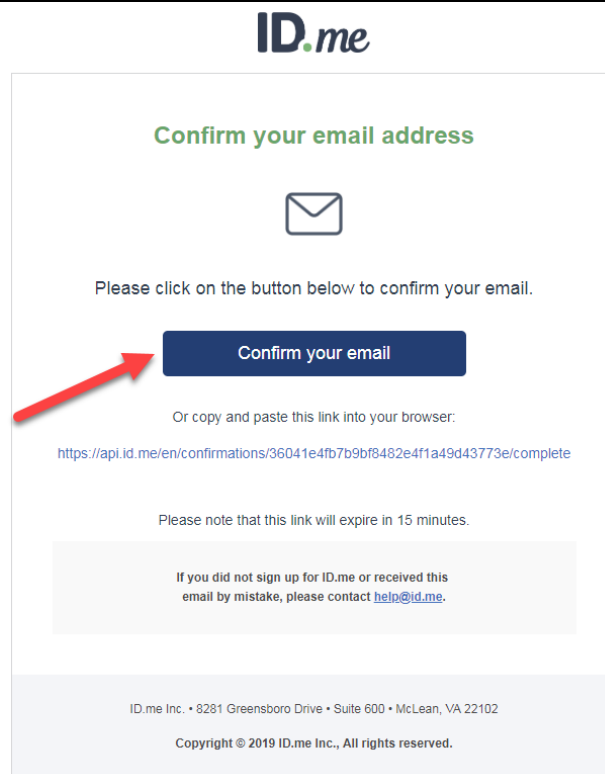


After your email is confirmed, return to this page  
to continue.

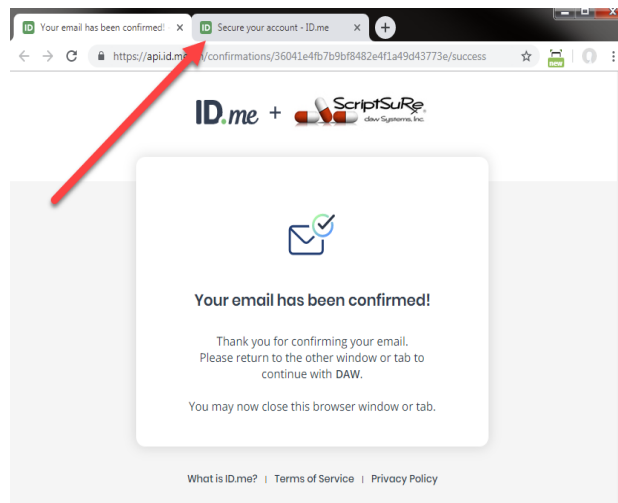
Didn't receive the email? [Send it again](#)

[Why do I need to confirm my email?](#)





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



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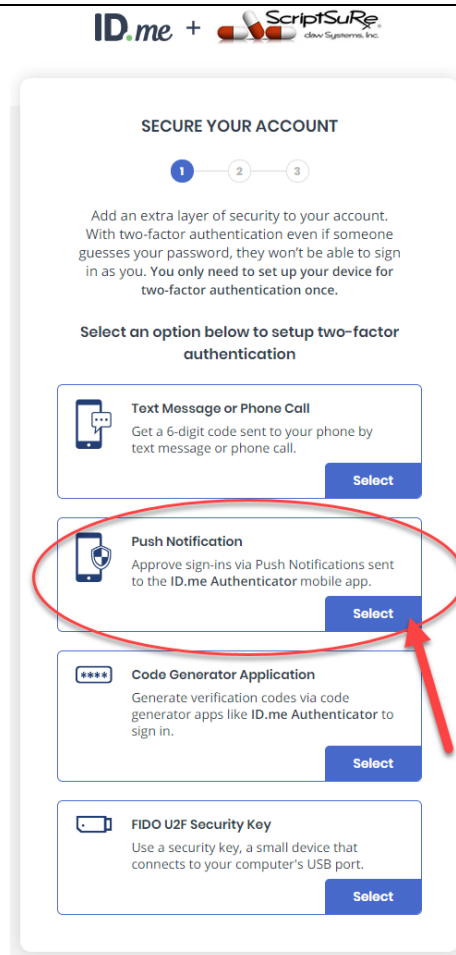
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**NOTE: YOU MAY NOW CLOSE THIS CONFIRMATION TAB.** To continue verification with ID.me, navigate to the tab in your browser you were working in originally to continue (see red arrow above pointing to the other tab).

## 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.



## 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.




### SECURE YOUR ACCOUNT

1 — 2 — 3


#### Choose app download method

Please download the ID.me Authenticator app to your smartphone or tablet device to get started.

How would you like to receive the download link?



Text message



Email

Your phone number

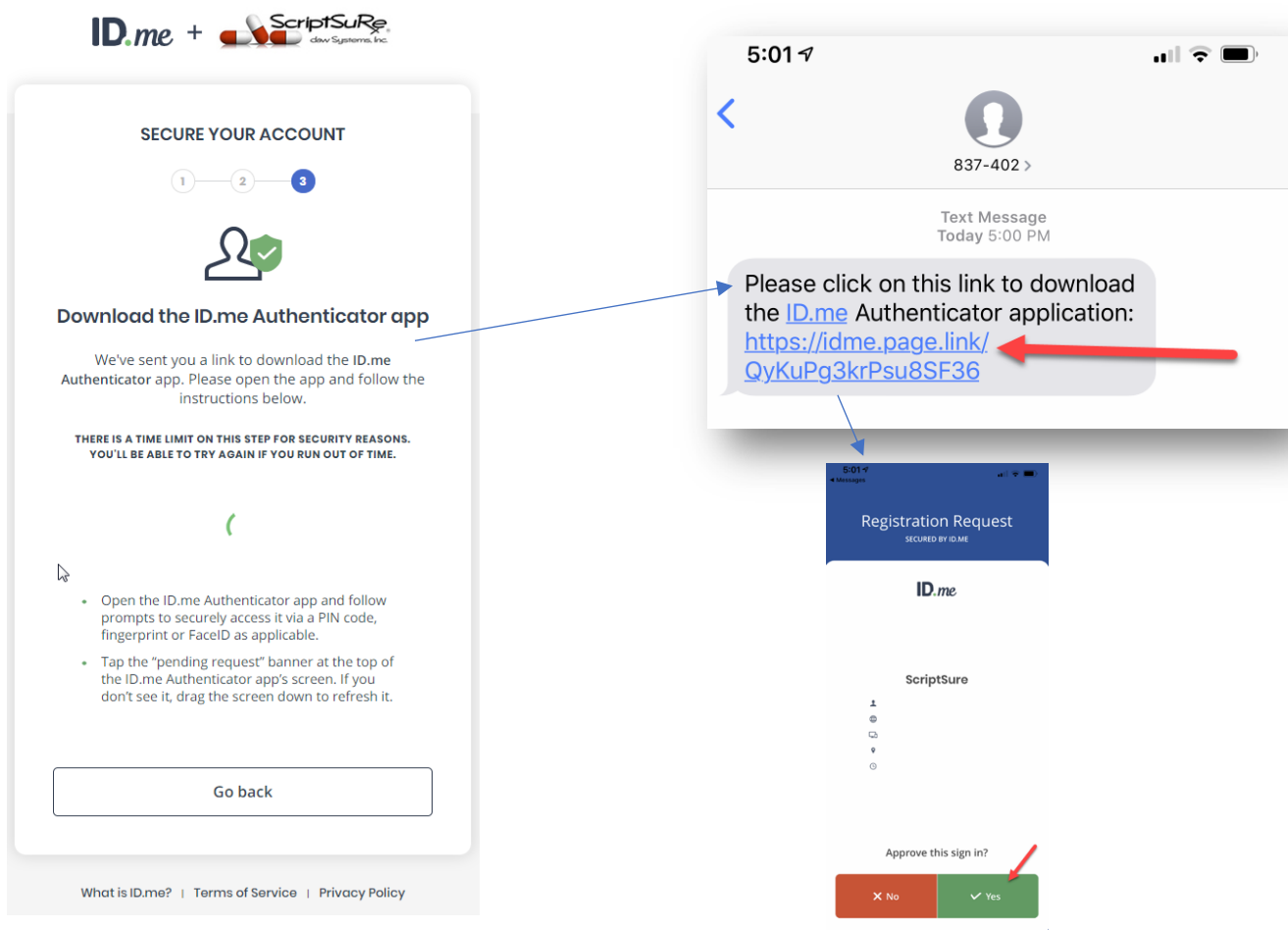
[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

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## 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.



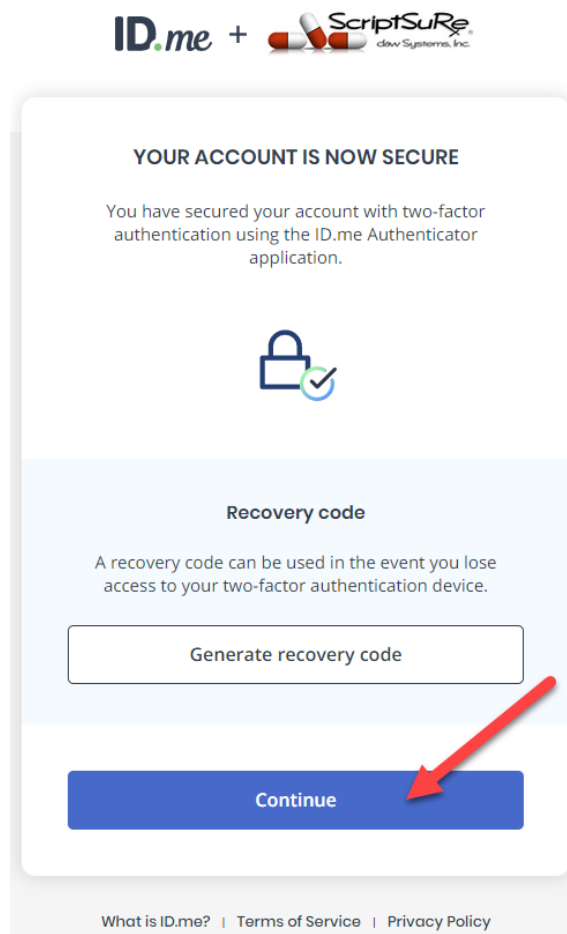
The image shows two screenshots. The left screenshot is a desktop browser view of the ID.me 'SECURE YOUR ACCOUNT' page. It features a progress indicator with steps 1, 2, and 3, where step 3 is active. Below this, it says 'Download the ID.me Authenticator app' and provides instructions: 'We've sent you a link to download the ID.me Authenticator app. Please open the app and follow the instructions below.' A warning states: 'THERE IS A TIME LIMIT ON THIS STEP FOR SECURITY REASONS. YOU'LL BE ABLE TO TRY AGAIN IF YOU RUN OUT OF TIME.' Below the instructions, there are two bullet points: 'Open the ID.me Authenticator app and follow prompts to securely access it via a PIN code, fingerprint or FaceID as applicable.' and 'Tap the "pending request" banner at the top of the ID.me Authenticator app's screen. If you don't see it, drag the screen down to refresh it.' A 'Go back' button is at the bottom. The right screenshot is a mobile text message from 837-402. The message says: 'Please click on this link to download the ID.me Authenticator application: <https://idme.page.link/QyKuPg3krPsu8SF36>'. A red arrow points to the link. Below the message is a 'Registration Request' banner from ID.me, which says 'ScriptSure' and has a list of icons. At the bottom, there is an 'Approve this sign in?' prompt with 'No' and 'Yes' buttons. A red arrow points to the 'Yes' button.

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.

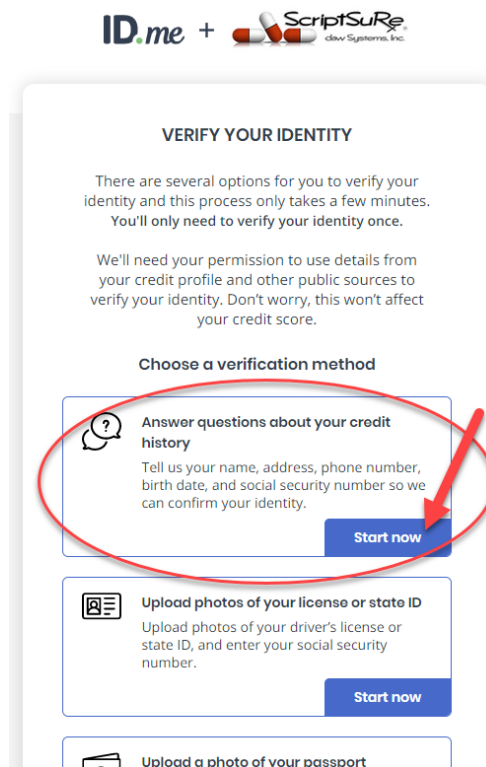



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## Step 10: Verify your Identity

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 upload or answering questions about your credit history. 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.






**ID.me** +  **ScriptSure**  
daw Systems, Inc.

### VERIFY YOUR IDENTITY

There are several options for you to verify your identity and this process only takes a few minutes.  
You'll only need to verify your identity once.

We'll need your permission to use details from your credit profile and other public sources to verify your identity. Don't worry, this won't affect your credit score.

**Choose a verification method**

-  **Answer questions about your credit history**  
Tell us your name, address, phone number, birth date, and social security number so we can confirm your identity.  
**Start now**
-  **Upload photos of your license or state ID**  
Upload photos of your driver's license or state ID, and enter your social security number.  
**Start now**
-  **Upload a photo of your passport**



**VERIFY YOUR IDENTITY**

1 — 2 — 3 — 4 — 5

**Enter your personal information**

What's this? ^

**First Name \***

1 Enter First Name

**Middle Name**

2 Enter Middle Name Optional

**Last Name \***

3 Enter Last Name

**Suffix** **Date of birth \***

-- MM/DD/YYYY 4

**Have you ever used a different last name? \***

5 No

**Social Security Number \***

6 #####

Why do you need my SSN? ^


**Gender**

7  Male  Female

**Continue**

What is ID.me? | Terms of Service | Privacy Policy



**ID.me** + 

**VERIFY YOUR IDENTITY**

1 — 2 — 3 — 4 — 5

Enter your most recent home address

**Address Line 1\***

1  No P.O. Boxes

**Address Line 2**

Apartment Unit, Suite #

**City\***

2

**State\***      **Zip Code\***

3       4

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### VERIFY YOUR IDENTITY


1 — 2 — **3** — 4 — 5

#### Enter your phone number

We'll verify your identity by making sure the phone number you enter matches the number in your credit profile, or we'll check your mobile carrier.


#### Select the phone type you have

If you have a smart phone with a web browser, we'll text you a link you can open. If you don't have a smart phone, we'll call you.



**1**

Smartphone  
with a web browser



Home or cell phone  
without a web  
browser

**2**

Mobile Phone\*

Home Phone

 Optional

WE CAN'T SUPPORT VIRTUAL OR INTERNET PHONE SERVICES  
LIKE SKYPE AND GOOGLE VOICE RIGHT NOW.

BackContinue

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**VERIFY YOUR IDENTITY**

1 — 2 — 3 — **4** — 5

**Confirm your information**

We will securely use the following information to verify your identity against trusted sources.

What does this mean? ^

Personal information	EDIT
First Name	
Middle Name	
Last Name	
Suffix	
Gender	
Date of birth	

Home address	EDIT
Street	
City	
State	
Zip Code	

Phone number	EDIT
Mobile Phone	

The information I've provided is correct, and I accept the use of [Fair Credit Reporting Act](#) data to verify my identity.

What is The Federal Fair Credit Reporting Act? ^

See our [Privacy Policy](#) for how we treat your data.

What is ID.me? | [Terms of Service](#) | [Privacy Policy](#)

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## 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 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.

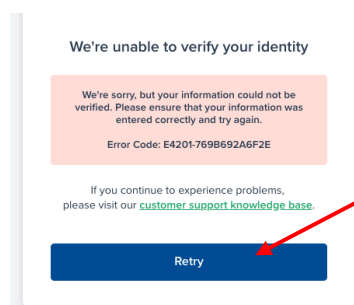
### GET STUCK ALONG THE WAY?

**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.

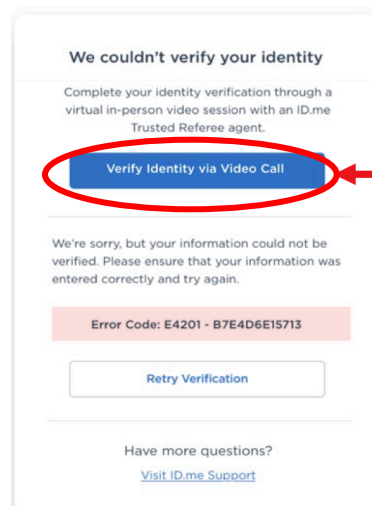


If the retry is successful, follow on-screen prompts to proceed to the next step of the workflow.

**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.

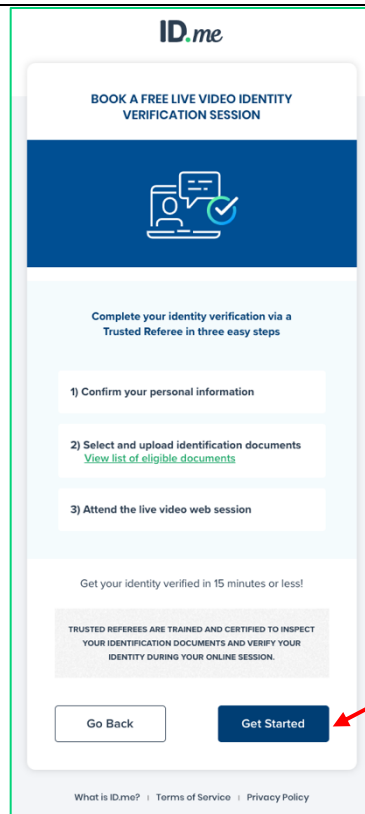


**Completing your Virtual In-Person identity verification should be simple and fast.**

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.

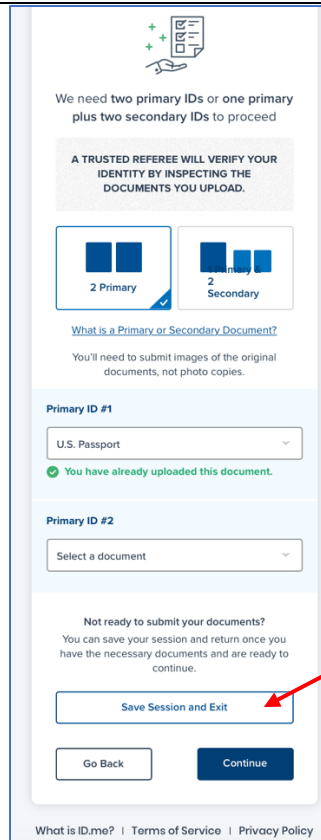
After your documents and Selfie are uploaded, you will be connected to an ID.me team member to perform Virtual In-Person identity verification.



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).

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We need two primary IDs or one primary plus two secondary IDs to proceed

A TRUSTED REFEREE WILL VERIFY YOUR IDENTITY BY INSPECTING THE DOCUMENTS YOU UPLOAD.

2 Primary

2 Secondary

[What is a Primary or Secondary Document?](#)

You'll need to submit images of the original documents, not photo copies.

**Primary ID #1**

U.S. Passport

✔ You have already uploaded this document.

**Primary ID #2**

Select a document

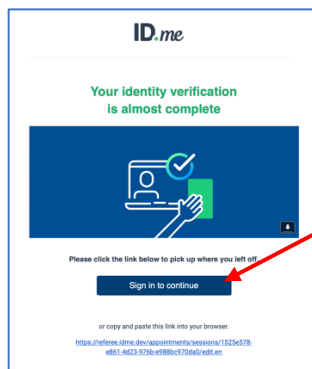
Not ready to submit your documents?  
You can save your session and return once you have the necessary documents and are ready to continue.

Save Session and Exit

Go Back Continue

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

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



**ID.me**

Your identity verification is almost complete

Please click the link below to pick up where you left off

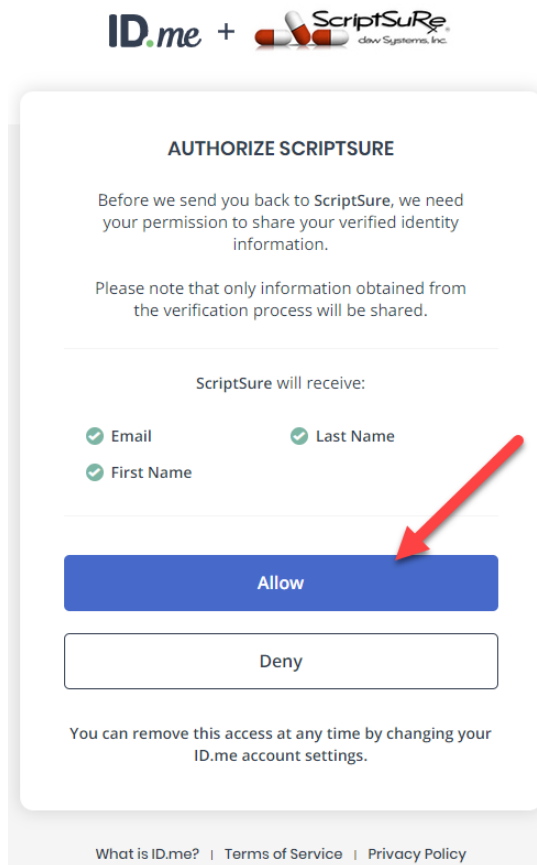
Sign in to continue

or copy and paste this link into your browser:  
<https://referee.id.me/drc/appointments/sessions/1523e378-e681-4623-973b-e988bc0730a6?ref=er>

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## STEP 12: Complete ID.me's workflow

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



The image shows a mobile-style authorization screen. At the top, it says "ID.me + ScriptSure" with logos for both. The main heading is "AUTHORIZE SCRIPTSURE". Below this, there are two paragraphs of text: "Before we send you back to ScriptSure, we need your permission to share your verified identity information." and "Please note that only information obtained from the verification process will be shared." A section titled "ScriptSure will receive:" lists three items: "Email", "First Name", and "Last Name", each with a green checkmark icon. Below the list are two buttons: a blue "Allow" button and a white "Deny" button. A red arrow points to the "Allow" button. At the bottom, there is a footer with links: "What is ID.me?", "Terms of Service", and "Privacy Policy".



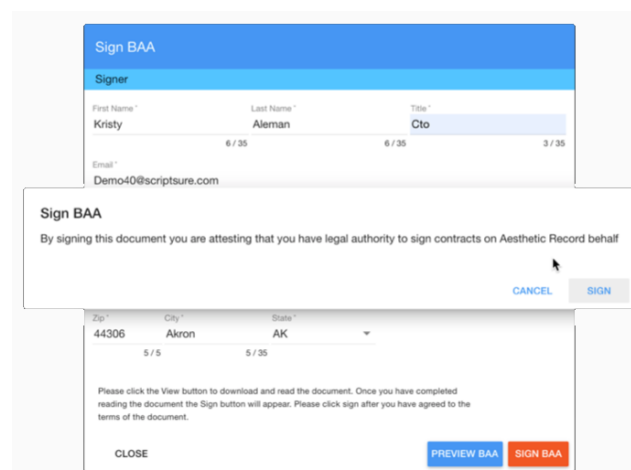
REV. 6/2020

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

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



### Step 13-(1): Enter signer and practice info and Click SIGN BAA and Confirm signing.

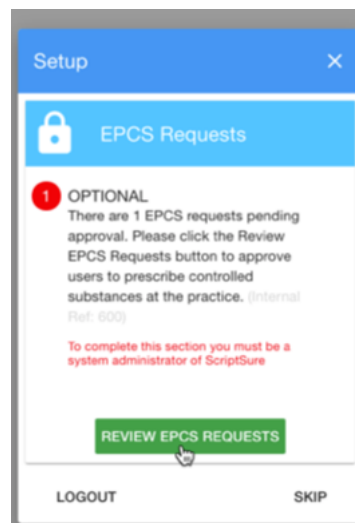


The screenshot shows a 'Sign BAA' form. The top section is titled 'Signer' and contains the following information: First Name: Kristy, Last Name: Aleman, Title: Cto, and Email: Demo40@scriptsure.com. The bottom section is titled 'Sign BAA' and contains the following text: 'By signing this document you are attesting that you have legal authority to sign contracts on Aesthetic Record behalf'. Below this text are 'CANCEL' and 'SIGN' buttons. At the bottom of the form are fields for Zip: 44306 and City: Akron, AK, and a 'CLOSE' button. At the bottom right are 'PREVIEW BAA' and 'SIGN BAA' buttons.

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

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 [www.scriptsure.com](http://www.scriptsure.com) 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 [Verifying My Identity for Healthcare](#) and [Securing my EPCS or eRx Account with Multi-factor Authentication \(MFA\)](#)

#### Questions or Issues during Setup?

For help with any issues during setup, contact [support@dawsystems.com](mailto:support@dawsystems.com) or call 866-755-1500 x2