ChartMaker® Clinical Quick Reference Card

Electronic Prescribing of Controlled Substances (EPCS)

EPCS Enrollment

1. Go to **www.sticomputer.com**
2. Click the "**Enrollments**" link from the top
3. Click "**Electronic Prescribing of Controlled Substances (EPCS)**"
4. Fill out the applicable information and click "**Submit**"

NOTE: This enrollment form will notify STI of your intent to enroll in the EPCS program as well as request/purchase the appropriate token and certificate from IndenTrust. You will not be able to complete configuration within ChartMaker® Medical Suite until your token and certificate are received and installed. The IdenTrust certificate must be installed on any device that your provider intends to electronically prescribe controlled substances from.

ChartMaker® Medical Suite Configurations

Logical Access User Privilege

1. In Clinical, go to **Edit** > **System Tables** > **Users**
2. Highlight the **user**
3. Click "**Properties**"
4. In the Privilege option box, select "**Logical Access**"
5. Select the "**Authorized**" radio button for Level
6. Click "**OK**"
7. Repeat steps 2 – 6 for any additional users
8. Click "**Close**"

NOTE: The Logical Access privilege allows the selected user the ability to administer EPCS capabilities to qualified practitioners. At least 2 users will need to be assigned this privilege with one of them being an EPCS-enabled provider with a token.

Prescriber Setup

1. In Clinical, go to **Edit** > **System Tables** > **Electronic Prescribing** > **Prescriber Setup**
2. Highlight the **Provider** and **Location**
   NOTE: If there are no Locations for the selected Provider, click "Add" and skip to Step 4.
3. Click "**Edit**"
4. Fill in the applicable information, including **SPI** and **DEA** number, if not already present
5. Click the checkbox for "**EPCS Enabled**"
6. Click "**OK**"
7. Repeat steps 2 – 6 for any additional providers
8. Click "**OK**" to close the Prescriber Setup dialog

NOTE: Prescriber Setup is applicable to all e-prescribing functionality whether it is a controlled substance or not.

EPCS Token Linkage

1. In Clinical, go to **Edit** > **System Tables** > **Electronic Prescribing** > **EPCS Token Linkage**
2. Insert the **token** into a USB port on your computer
3. Click "**Load**"
4. Select the **certificate** and click "**OK**"
5. Click "**Link**"
6. Click "**OK**" on the confirmation dialog

NOTE: The Token Linkage option will only be available to users that are configured with the EPCS SureScripts service level rights on the Health Portal and have "EPCS Enabled" selected in Prescriber Setup.

Prescription Layout

1. In Clinical, go to **Edit** > **Preferences** > **Prescription** tab
2. In the **Rx Format** field, click the ellipses icon to select a different format
3. Select the applicable **.cml file** for your state and click "Open"
   NOTE: The applicable files include "EPCS" in the name. They are located in \\stisuite\rootdir\000\config\cml folder.
4. Click "**Set**"
5. Click "**OK**"
6. Repeat steps 1 – 5 **for all users**

EPCS Prescriber Authorization
(Sending the Authorization Request)

1. In Clinical (logged in as someone other than the Prescriber you are attempting to authorize), go to **Edit** > **System Tables** > **Electronic Prescribing** > **EPCS Prescriber Authorization**
2. Select the applicable **Prescriber**
3. Select the user from the "**Logical Access User**" dropdown that you want to receive the authorization request
4. Click "**Authorize**"
5. Click "**Yes**"
6. Click "**Close**"

EPCS Prescriber Authorization
(Approving the Authorization Request)

1. In Clinical (logged in as the EPCS Prescriber), **double-click** on the To Do List notification titled, "**EPCS Authorization Approval Requested**"
2. Insert the IndenTrust **Token** into your computer
3. Click "**Approve**"
4. Type your IdenTrust Token **password**
5. Click "**OK**"
6. Click "**OK**" on the confirmation dialog

NOTE: The user logged in needs to have their "Logical Access" privilege set to "Authorized" in order for the EPCS Prescriber Authorization menu option to be available.

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Auditing and Reporting

EPCS Audit Trail

To access the Audit Trail:
1. In Clinical, go to **Chart** > **Audit** > **EPCS Audit Trail and Drug Log…**
2. Modify the "From" and "To" fields in **Date Range**, if applicable
3. Uncheck any unnecessary **Actions** or **Outcomes** in the "Custom Report" section to modify the results to be displayed
4. Select the **Metadata** dropdown and enter a Search Value to search for specific criteria, such as specific patient or medication
5. Uncheck "**Show only incidents**" if you would like to see all records and not just ones designated as "incidents"
6. Click "**Refresh Report**"

NOTE: If the Audit Trail was opened inside of a patient's chart, the information displayed will be patient-specific.

To save a copy:
1. Generate the report by completing steps 1-6 above
2. Click "**Save As Text**" to save as a .txt file or "**Save as HTML**" to save as a .html file
3. Designate a **File name**
4. Click "**Save**"

Controlled Substance Drug Log

To access the Controlled Substance Drug Log:
1. In Clinical, go to **Chart** > **Audit** > **EPCS Audit Trail and Drug Log…**
2. Click the "**Controlled Substance Drug Log**" tab

To generate a new report:
1. Click the "**New Report**" tab
2. Select the appropriate **Provider**
3. Select the **Start** and **End Date** to select the time range for this report
4. Click "**Generate Report**"

To view an archived report:
1. Click the "**Report Archive**" tab
2. Click "**Previous Reports…**"
3. Select the applicable **Drug Log**, from the top
4. Click "**View Report**"

NOTE: If the Drug Log was Generated by "SYSTEM", this indicates that it was an automated Monthly Drug Log and not manually created.

To save a copy of a New Report or an Archived Report:
1. **Generate** the report by completing steps 1 – 4 above
2. Click "**Export…**"
3. Designate a **File name**
4. Click "**Save**"

Daily Incident Report

To view a Daily Incident Report:
1. In Clinical, double-click on the To Do List reminder labeled, "**REQUIRED: Controlled Substance Daily Incident Report Reminder**"

2. Click "**Close**" to close the audit dialog

- The Daily Incident Report will appear on the To Do List for any user that has the Logical Access user privilege set to "Authorized".

Monthly Drug Log

To view a Monthly Drug Log:
1. In Clinical, double-click on the To Do List reminder labeled, "**REQUIRED: Controlled Substance Monthly Drug Log Reminder**"

NOTE: If the user logged in is not the provider, you will be prompted to select which Drug Log you would like to view first. Highlight the report and click "**View Report**".

2. Click "**Close**" to close the audit dialog

- The Monthly Drug Log will appear on the To Do List for any user (provider) that has been authorized for EPCS.

NOTE: Both reports should be reviewed for any suspicious activity and if any such incidents are found, they must be reported to STI Computer Services and to the DEA within one business day.

Configuring Distribution Lists

If you want to manually add a user to receive the Daily Incident Report or Monthly Drug Log:
1. Go to **To-Do** > **New Message/Task…**
2. Click "**To…**"
3. Highlight **Controlled Substance Daily Report Notification** or **Controlled Substance Monthly Drug Log Notification**
4. Click "**Edit…**"
5. Select the applicable **user(s)**
6. Click "**Save**"
7. Click "**Cancel**" twice