

# ID.me Identity Proofing & EPCS Credentialing

Last Modified on 02/12/2025 2:56 pm EST

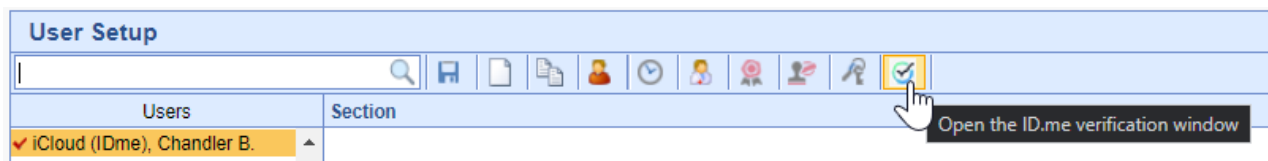
## Overview of ID.me Integration

### Overview

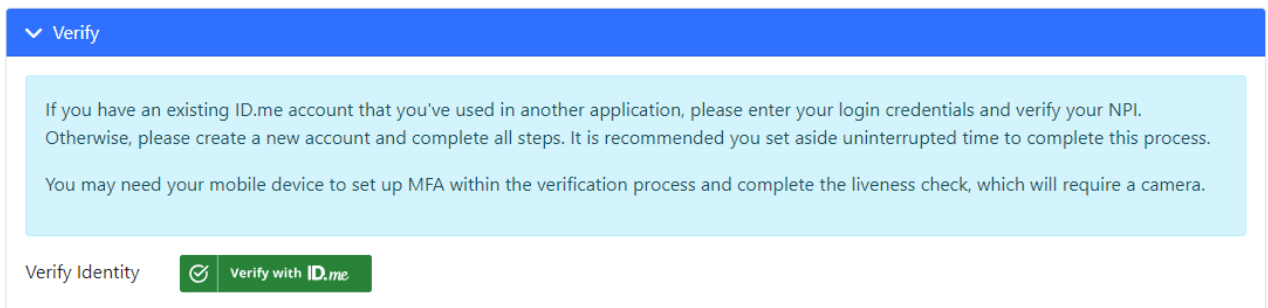
The ID.me integration within iSalus will allow for two crucial actions to take place before a provider prescribes controlled substances from within the system. SureScripts and the DEA require the following to place electronic prescriptions:

#### Identity Proofing for General ePrescribing:

A user (prescriber) will need to complete IAL2 (Identity Assurance Level 2) **Identity Proofing** before being added to the SureScripts prescribing network. This is completed within the IDme Verify screen, found in User Setup > Toolbar - Checkmark Icon (see below). There is no charge for these services as it is included in the monthly subscription rate for the provider accounts.



**IMPORTANT: Providers intending to ePrescribe** medications from within OfficeEMR **MUST Complete** Identity Proofing via ID.me



#### Obtain Credentials for Prescribing Controlled Substances (EPCS):


A user (prescriber) will need to complete the **Verify EPCS** process to obtain valid credentials to be used for the signing step of prescribing controlled substances. There is a monthly cost for this product. Please open a ticket with support to enable the setup and discuss the pricing of the "IDme EPCS" product within your database. See [Complete EPCS Setup via ID.me](#) for full step-by-step instructions.


**NOTE:** If a provider intends on prescribing from multiple service locations, and has multiple DEA numbers (*specific to state*) each of the valid DEA numbers should be added to both iSalus and IDme for verification.

Verify

If you have an existing ID.me account that you've used in another application, please enter your login credentials and verify your NPI. Otherwise, please create a new account and complete all steps. It is recommended you set aside uninterrupted time to complete this process.

You may need your mobile device to set up MFA within the verification process and complete the liveness check, which will require a camera.

Verify Identity 

Verify EPCS 

## Complete Identity Proofing via ID.me

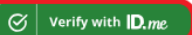


The purpose of Identity Proofing is to ensure an OfficeEMR provider is who they claim to be prior to being able to electronically send prescriptions from the EMR. This document will describe the necessary steps to complete the setup from the provider's perspective.

Verify

If you have an existing ID.me account that you've used in another application, please enter your login credentials and verify your NPI. Otherwise, please create a new account and complete all steps. It is recommended you set aside uninterrupted time to complete this process.

You may need your mobile device to set up MFA within the verification process and complete the liveness check, which will require a camera.

Verify Identity 

The Identity Proofing process is a requirement from [SureScripts](#) starting 9/01/2022, new prescribers being added to the SureScripts network must complete at a minimum, IAL2 identity proofing. [Providers needing to prescribe Controlled Substances \(EPCS\) MUST COMPLETE EPCS Enrollment via ID.me.](#)

### Prerequisite

**Security Screen:** Practice - General > Admin > **IDme Verify**

The above screen will need to be enabled for the role associated with the user completing Identity Verification. This role will need to have "[Write](#)" permissions in order to access the screen described in Step 3 below. For help on modifying roles, see the documentation on [Assigning a Screen to a Role](#).

### Steps to Complete

1. After logging into OfficeEMR
2. Navigate to **User Setup** (Setup > Users or "Current User" from the bottom left of the screen)
3. Ensure your name is selected from the left side, then **select the checkmark icon** from the toolbar

*Note: If you are unable to access this button, please see the above Prerequisite section.*



4. **Search & Save** the "Prescribing Provider", this is the provider to be verified (yourself)

## ID.me Verify

**User** chandler  
**Provider**    
Select a Provider to associate with ID.me

5. Select **Verify Identity**

## ID.me Verify

**User** chandler  
**Provider** Seuss, Doctor

Verify

If you have an existing ID.me account that you've used in another application, please enter your login credentials and verify your NPI. Otherwise, please create a new account and complete all steps. It is recommended you set aside uninterrupted time to complete this process.

You may need your mobile device to set up MFA within the verification process and complete the liveness check, which will require a camera.

Verify Identity  Verify with ID.me  
Verify EPCS  Verify with ID.me

6. **Create an ID.me account** or **Login with an existing ID.me account**, if logging into an **existing account** please skip to step 22.

### Tips

- This **CAN NOT** be completed by an Administrator on behalf of a provider.
- You will want to ensure you have set aside **uninterrupted time (10-20 minutes)** and have your **Personal Cell Phone, Drivers License, and NPI** easily accessible.
- **Existing ID.me accounts may be used** to complete the process, just log in with your existing credentials, enter your NPI and allow iSalus to access the data via the prompt. Potential entities you may have already created an account for include (IRS, DMV, Social Security Administration, former EMR, and more)
- Be sure to contact iSalus Support or your Implementation contact once completed to ensure your credentials will be enabled in the SureScripts network. If you do not notify the team, you will be unable to electronically prescribe from the EMR.

7. Enter your **PERSONAL EMAIL**, create a password, and accept the TOS and Privacy Policy

Email \*

Did you mean: [email@me.com](#)

Password \*

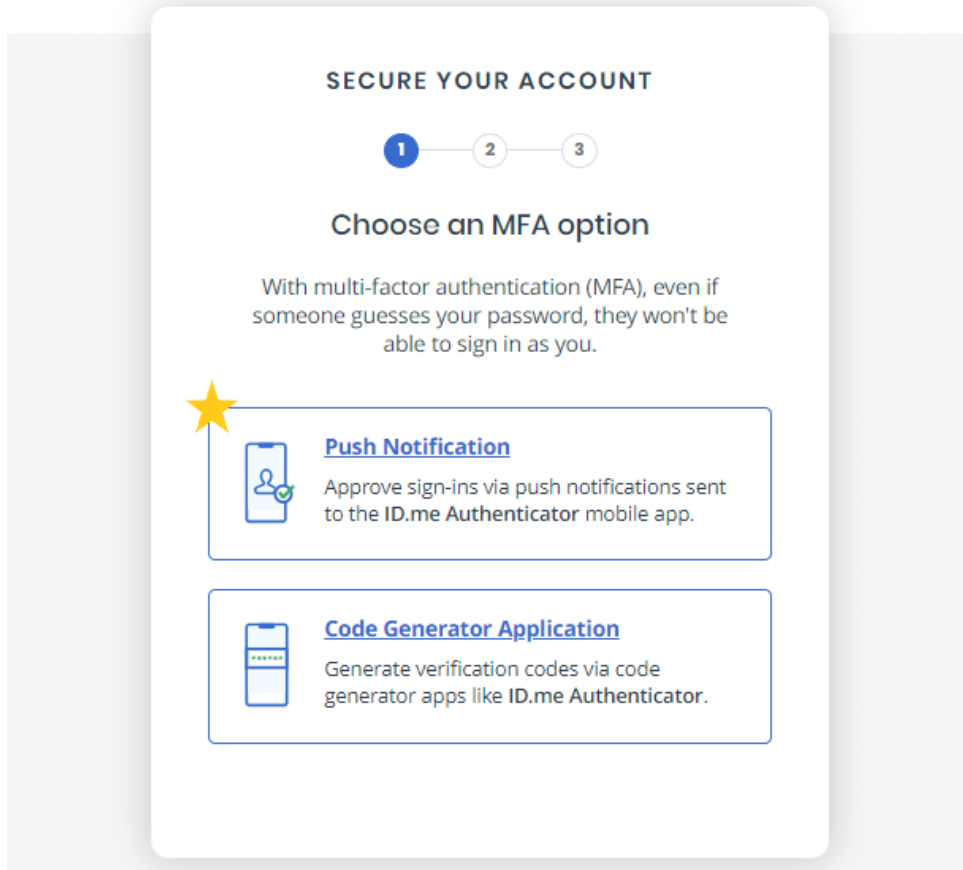
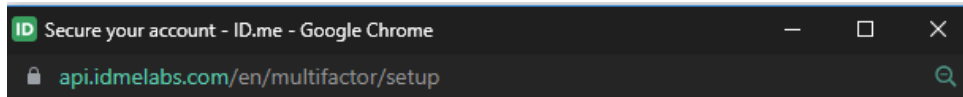
Confirm Password \*

I accept the ID.me [Terms of Service](#) and [Privacy Policy](#)

**Tip**

It is in your best interest to **use a personal email** as opposed to the **company email** affiliated with your practice. Since this account may be used for personal affairs outside of iSalus, you will want to be in control of the email address you provide.

8. **Enter the 6-digit code** received in your personal email, then select **Continue**
9. **Select a Multi-Factor Authentication (MFA)** method from the available list. The **Push Notification** is best, but **Code Generator Application** is also available. The Code Generator option adds more steps to the prescribing workflow but is DEA-compliant.



10. **Complete MFA Setup** by providing the cell phone number of the device you intend to receive 2FA request on. Once you receive the text message follow the on-screen instructions to Download the **IDme Authenticator** and associate the ID.me account.
11. **Approve** (*Push Notification*) or **Enter the code** (Open IDme Authenticator and enter 6-digit code) received via the selected MFA, then select **Continue**
  - You may optionally generate a recovery code that you may access the [ID.me](#) in the event you lose access to the device setup for MFA. You will want to keep this code someplace safe, outside of the device you have MFA setup on.
12. **Choose a Verification Method**, typically the **license or state ID** option will be the easiest to provide.
13. **Accept the consent** for Biometric Data Collection. This is to ensure you are able to complete the "liveness" check after uploading your documents.
14. You may either **Take a Photo** or upload an existing image of your selected document type.
  - If uploading documents, you will want to select from your computer's files the Front and Back of the document (unless Passport)
15. After selecting Take a Photo, you will be prompted to **Enter a Mobile Phone Number** and **Continue**. This phone will receive a link to complete the document upload and "liveness" check.
16. **Select the link** received on your phone, the screen will look like the following in your mobile browser.



Your identity is being used to access  
OfficeEMR

The email address used for this ID.me account is  
e@mail.com

---

Do you control this email address?

Yes

No

17. **Follow the prompts for taking photos with your phone**

- Depending on the document type selected in step 11, you will be asked to upload the Front and Back of the document.
- Review the documents on the page before submitting them for verification. Ensure they are clear and the edges are not cut off.

18. After uploading/taking the photo you will need to **take a video selfie**

## VERIFY YOUR IDENTITY



### Begin video selfie with liveness detection?

- Make sure you are in a well-lit area
- Remove anything that covers your face (e.g., glasses, hats)
- Avoid a light source behind you (backlight)
- Hold the phone straight in front of your face (avoid angles)

Scan my face

19. Ensure you "**Allow Access to Camera**" within your mobile device's browser when prompted, and complete a scan of your face.
  - It is important that when you scan your face it matches the document you have just uploaded. Namely, if you are wearing glasses currently but were not on your driver's license, please remove them.
  - Be sure to follow prompts during the scan, there may be warnings such as "Move Closer"
  - If the scan is not working for you initially, please try again until after your third attempt.
20. Once the **Images Submitted** message is seen on your phone, **navigate back to the computer** where you started the process.
21. **Enter any remaining fields** related to your identity, this may just be your **SSN**, but you may be prompted for your **Current Home Address** (if unable to verify the information from the uploaded document)
22. **Verify the Details** seen on the **ID.me** screen. If correct, select the **Checkbox** and **Yes** to continue

## Is your information displayed correctly?

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

[What does this mean?](#) ^

### Personal information

First Name VERONICA

Middle Name C

Last Name PERSINGER

Date of Birth 07/09/1942

### Home address

Street 1234 Aggie Ln

124

City Indianapolis

State IN

Zip Code 46260

### Phone number

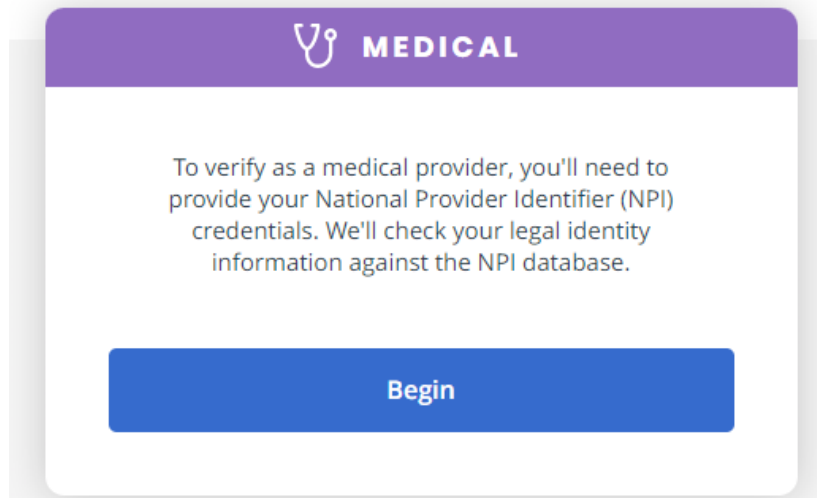
Mobile Phone 317-474-2516

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

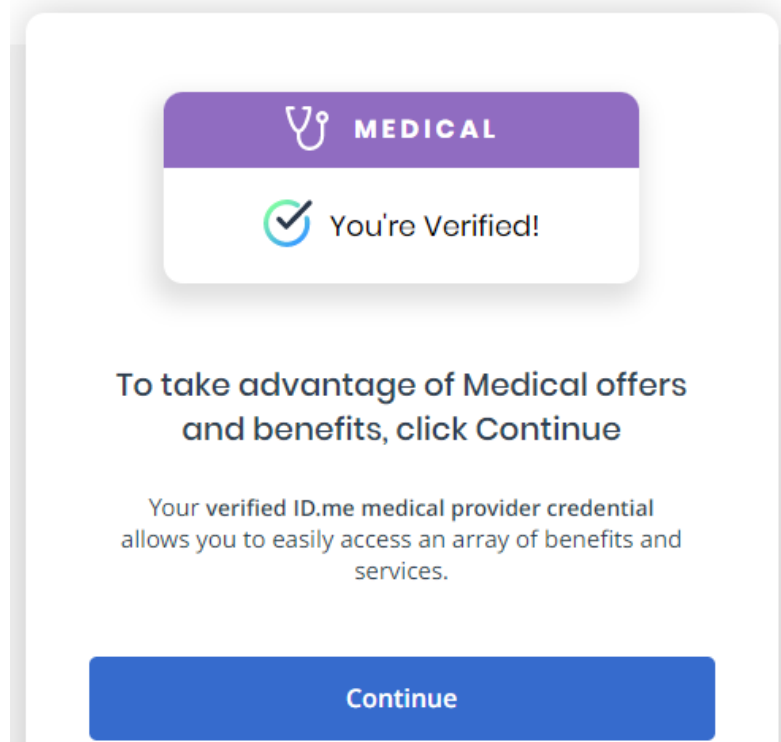
[What is The Federal Fair Credit Reporting Act?](#) ^

23. Begin the NPI check





24. **Enter your NPI.** If all information returns correctly (State License Number & Issuing State), **select a Provider Type** from the provided list. Then **select continue.**



25. **Allow** the information to be shared back to OfficeEMR
26. **Confirm the results** in the Identity Proofing Screen
- Ensure the **NPI in the ID.me column matches what is seen in Provider Setup**
  - The additional details such as email may differ depending on what was provided in the New Provider Packet or Implementation Packet. These may differ but will still allow you to continue.
27. After the results are confirmed, you will need to **contact iSalus to complete the process.** If you are in Implementation please reach out to your contact on the project. If adding a New Provider via Support

please reach out to [support@isalushealthcare.com](mailto:support@isalushealthcare.com) or open a ticket to "Enable ePrescribing for {Doctor Name}"

28. After the iSalus representative has completed their portion, you will be ready to ePrescribe within the EMR.

## Complete EPCS Enrollment via ID.me



The purpose of the ID.me EPCS credential is to ensure an OfficeEMR prescriber is able to electronically send controlled substance (EPCS) prescriptions in the EMR in accordance with DEA 1311 requirements. This document will describe the necessary steps to complete from the provider's perspective.

▼ Verify

If you have an existing ID.me account that you've used in another application, please enter your login credentials and verify your NPI. Otherwise, please create a new account and complete all steps. It is recommended you set aside uninterrupted time to complete this process.

You may need your mobile device to set up MFA within the verification process and complete the liveness check, which will require a camera.

Verify EPCS  Verify with ID.me

## Process Overview

In order to prescribe electronic controlled substances (EPCS), the following parts must be completed:

1. Complete EPCS Enrollment via ID.me
2. Add & Enabled the ID.me EPCS Credential
3. **\*\*Approve ID.me Credentials**

**\*\* The first prescriber added to any database will be auto-approved. All subsequent providers added to that database must receive approval from a provider with an approved credential.**

## Prerequisite

**Security Screen:** Practice - General > Admin > IDme Verify

The above screen will need to be enabled for the role associated with the user setting up Identity Verification. This role will need to have "Write" permissions in order to access the screen described in Step 3 below. For help on modifying roles, see the documentation on [Assigning a Screen to a Role](#).

**TIP:** ID.me will request you to provide the prescriber's **NPI & DEA Number & State**. Have these values readily available when beginning the process to ensure you are able to complete the Medical Credential Check step without navigating away from the setup screens.

## Steps to Complete

1. After logging into OfficeEMR
2. Navigate to **User Setup** (Setup > Users or "Current User" from the bottom left of the screen)
3. Ensure your name is selected from the left side, then **select the checkmark icon** from the toolbar  
*Note: If you are unable to access this button, please see the above Prerequisite section.*



4. **Search & Save** the "Prescribing Provider", this is the provider to be credentialed (yourself)

## ID.me Verify

**User** chandler

**Provider**

Select a Provider to associate with ID.me

5. Select **Verify EPCS**

*"Verify Identity" is for prescribers who do not prescribe EPCS*

Verify

If you have an existing ID.me account that you've used in another application, please enter your login credentials and verify your NPI. Otherwise, please create a new account and complete all steps. It is recommended you set aside uninterrupted time to complete this process.

You may need your mobile device to set up MFA within the verification process and complete the liveness check, which will require a camera.

Verify EPCS  Verify with ID.me

6. **Create an ID.me account** or **Login with an existing ID.me account**, if logging into an existing account please skip to step 22.

### Tips

- This **CAN NOT** be completed by an Administrator on the behalf of a provider.
- You will want to ensure you have set aside **uninterrupted time (10-20 minutes)** and have your **Personal Cell Phone, Drivers License, and NPI** easily accessible.
- **Existing ID.me accounts may be used** to complete the process, just log in with your existing credentials, enter your NPI and allow iSalus to access the data via the prompt. Potential entities you may have already created an account for include (IRS, DMV, Social Security Administration, Former EMR, and more)
- Be sure to contact iSalus Support or your Implementation contact once completed to ensure your credentials will be enabled in the SureScripts network. If you do not notify the team, you will be unable to electronically prescribe from the EMR.

7. Enter your **PERSONAL EMAIL**, create a password, and accept the TOS and Privacy Policy

Email \*

Did you mean: [email@me.com](#)

Password \*

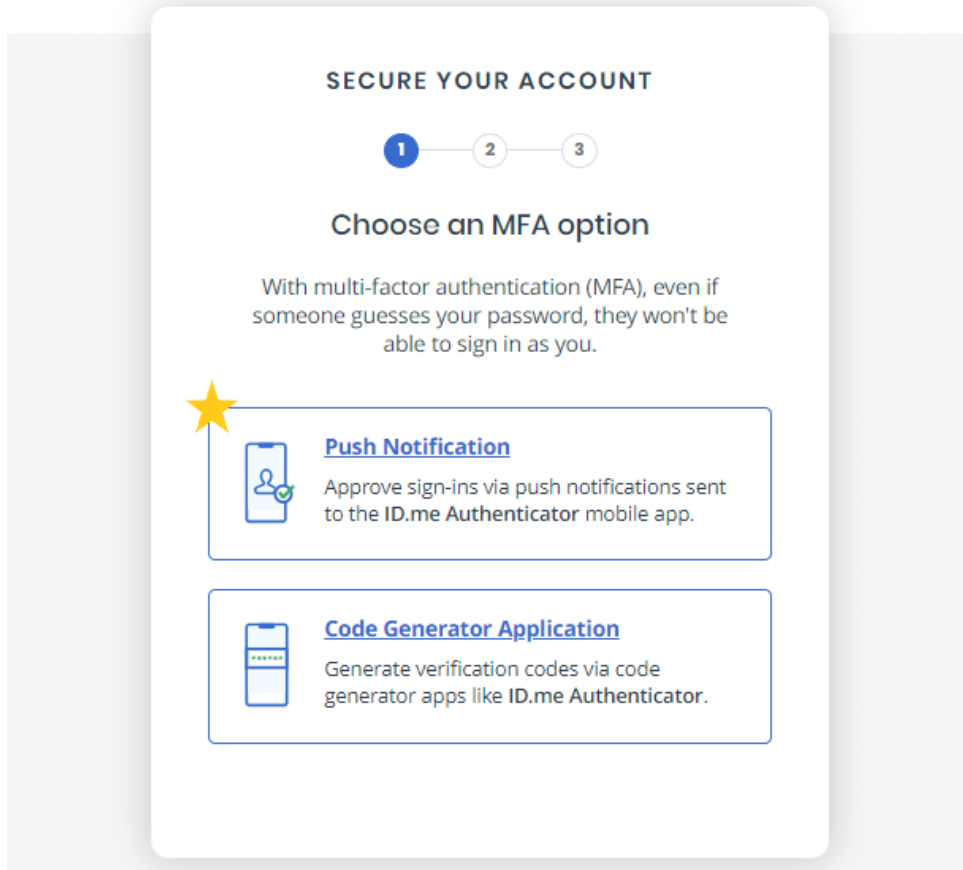
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I accept the ID.me [Terms of Service](#) and [Privacy Policy](#)

**Tip**

It is in your best interest to **use a personal email** as opposed to the **company email** affiliated with your practice. Since this account may be used for personal affairs outside of iSalus, you will want to be in control of the email address you provide.

8. **Enter the 6-digit code** received in your email, then select **Continue**
9. **Select a Multi-Factor Authentication (MFA)** method from the available list. The **Push Notification** is best, but **Code Generator Application** is also available. The Code Generator option adds more steps to the prescribing workflow but is DEA-compliant.



10. **Enter the code** received via the selected MFA, then select **Continue**
  - You may optionally generate a recovery code that you may access the [ID.me](#) in the event you lose access to the device setup for MFA. You will want to keep this code someplace safe, outside of the device you have MFA setup on.
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12. **Accept the consent** for Biometric Data Collection. This is to ensure you are able to complete the "liveness" check after uploading your documents.
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14. After selecting Take a Photo, you will be prompted to **Enter a Mobile Phone Number** and **Continue**. This phone will receive a link to complete the document upload and "liveness" check.
15. **Select the link** received on your phone, the screen will look like the following in your mobile browser.



Your identity is being used to access  
OfficeEMR

The email address used for this ID.me account is  
e@mail.com

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Do you control this email address?

Yes

No

16. **Follow the prompts for taking photos with your phone**

- Depending on the document type selected in step 11, you will be asked to upload the Front and Back of the document.
- Review the documents on the page before submitting them for verification. Ensure they are clear and the edges are not cut off.

17. After uploading/taking the photo you will need to **take a video selfie**

## VERIFY YOUR IDENTITY



### Begin video selfie with liveness detection?

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- Avoid a light source behind you (backlight)
- Hold the phone straight in front of your face (avoid angles)

Scan my face

18. Ensure you "**Allow Access to Camera**" within your mobile device's browser when prompted, and complete a scan of your face.
  - It is important that when you scan your face it matches the document you have just uploaded. Namely, if you are wearing glasses currently but were not on your driver's license, please remove them.
  - Be sure to follow prompts during the scan, there may be warnings such as "Move Closer"
  - If the scan is not working for you initially, please try again until after your third attempt.
19. Once the **Images Submitted** message is seen on your phone, **navigate back to the computer** where you started the process.
20. **Enter any remaining fields** related to your identity, this may just be your **SSN**, but you may be prompted for your **Current Home Address** (if unable to verify the information from the uploaded document)
21. **Verify the Details** seen on the **ID.me** screen. If correct, select the **Checkbox** and **Yes** to continue

## Is your information displayed correctly?

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

[What does this mean?](#) ^

### Personal information

First Name VERONICA

Middle Name C

Last Name PERSINGER

Date of Birth 07/09/1942

### Home address

Street 1234 Aggie Ln

124

City Indianapolis

State IN

Zip Code 46260

### Phone number

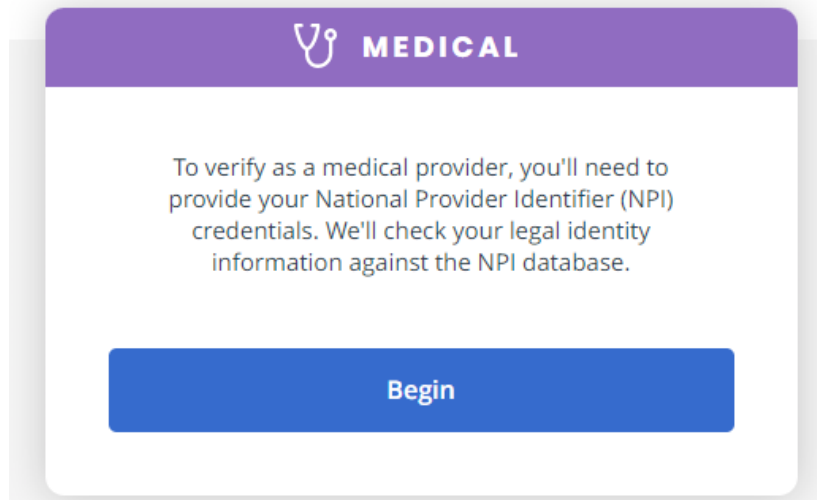
Mobile Phone 317-474-2516

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

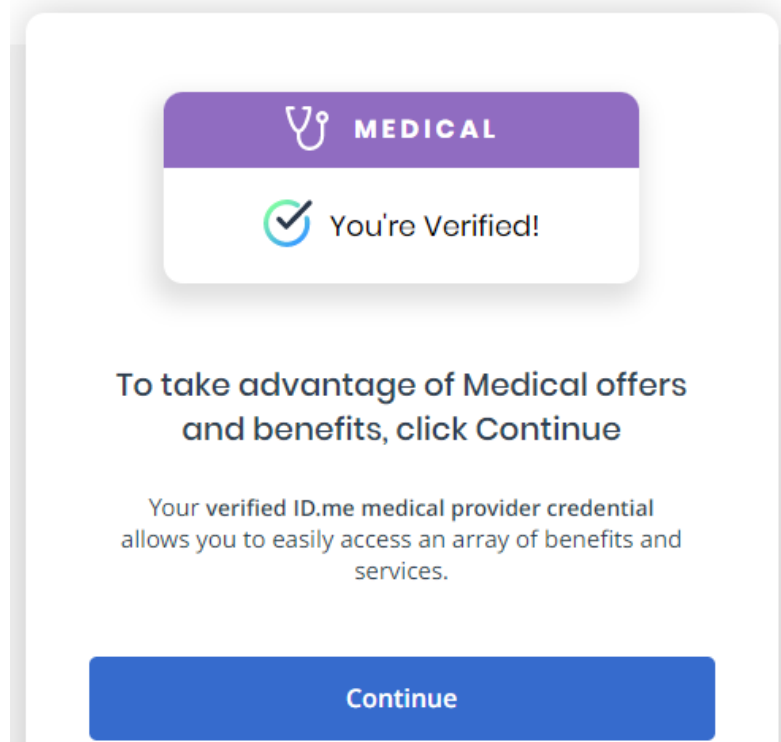
[What is The Federal Fair Credit Reporting Act?](#) ^

22. Begin the NPI & DEA check






23. **Enter your NPI.** If all information returns correctly (State License Number & Issuing State), **select a Provider Type** from the provided list. Then **select continue.**



24. **Allow** the information to be shared back to OfficeEMR
25. **Confirm the results** in the Identity Proofing Screen
- Ensure the **NPI & DEA number in the ID.me column matches what is seen in OfficeMD Provider Setup**
  - The additional details such as email may differ depending on what was provided in the New Provider Packet or Implementation Packet. These may differ but will still allow you to continue.
26. After the results are confirmed, you will need to **contact iSalus to complete the process if you DO NOT see "SPI Approved" in green** as shown below. If you are in Implementation please reach out to your contact

on the project. If adding a New Provider via Support please reach out to [support@isalushealthcare.com](mailto:support@isalushealthcare.com) or open a ticket to "Enable ePrescribing for {Doctor Name}".

If you are transitioning from IdenTrust to [ID.me](#) then you will not likely need iSalus to complete this step for you. It is likely that your SPI was approved before you ePrescribed from iSalus initially.

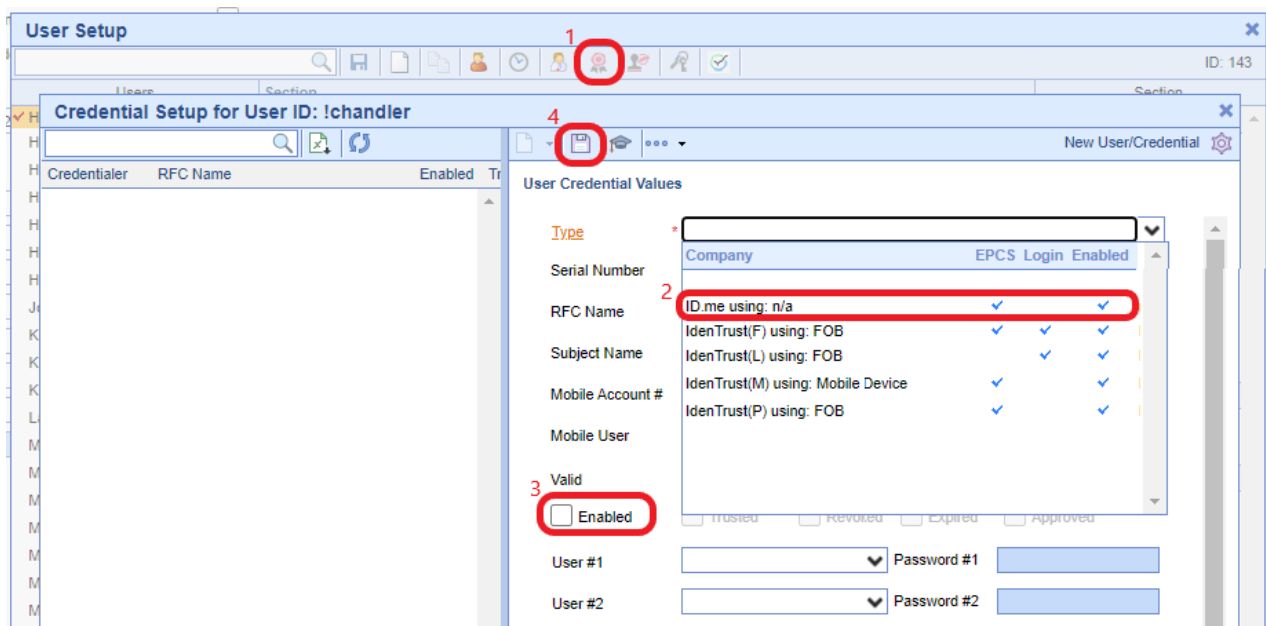
Provider Details			
	ID.Me		OfficeMD Provider Setup
Email	email@hotmail.com		
First Name	DAFFY		Daffy
Last Name	DUCK		Duck
State	CO		CO
Medical NPI	1669638999		1669638999
DEA Numbers	FM1695099	State: CO Expires: 2025-01-31	FM1695099 State: CO
	SPI Approved		
			
	Confirmed by test @ 07/10/2023 03:12:30 PM		

27. Once you have confirmed the ID.me EPCS details as described above, there are two remaining pieces to complete this are:
- Add & Enable the [ID.me](#) EPCS Credential (Part 2)
  - Approve [ID.me](#) Credentials (Part 3)

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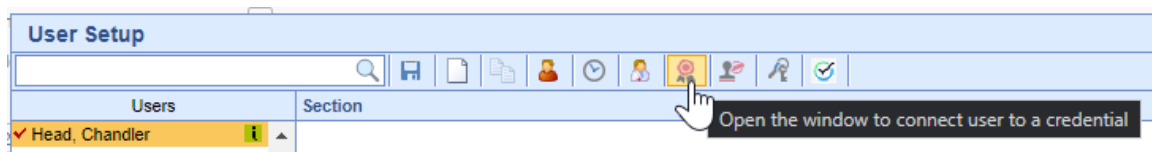
## Add & Enable the ID.me EPCS Credential

This article describes part 2 of the ID.me EPCS Credentialing process. Following the [Complete EPCS Enrollment via ID.me](#) steps, a user will be expected to Add & Enable their certificate to the OfficeEMR user account. This article describes the necessary steps to complete this portion of the configuration.



## Steps to Complete

1. As the Prescriber, login to [OfficeEMR](#)
2. Navigate to User Setup (Setup > User Setup OR from the bottom-left corner, select "Current User")
3. Within User Setup, open the **Credential Setup Screen** (#1 above)



4. Once opened, select the Credential **Type** dropdown, and select the first available option "ID.me using: n/a" (#2 above)
5. Select the **Enabled Checkbox** (#3 above)

*If a prescriber has an existing active credential; Once Save is selected, this will immediately inactivate the existing credential.*

6. **Save** (#4 above). Once saved, the credential is now active. However, if the prescribing user **IS NOT** the first provider to retrieve either IdenTrust or IDme EPCS credentials, the newly activated credential must be approved by a prescriber who has already been approved. The first provider added to a database is auto-approved. See [Approve a Credential](#) for step-by-step instructions on this process.

## Approve ID.me EPCS Credentials

This article describes the necessary steps an **approved prescriber** must take in order to approve subsequent prescribers being added to the database.

## Steps to Complete

1. While logged in with a user who already has an approved EPCS credential
  2. Navigate to User Setup > Credential Approval
  3. Locate the credential needing to be approved
  4. Select '**Approve**' checkbox & complete the 2FA prompt with your existing credential
  5. Once the complete the credential is ready to use within the EMR for prescribing EPCS.
-