How to Setup EPCS in Athena

A. Trusted Individual (Clinic Manager)

- **Initiate Identity Verification**

  1. Navigate to **Settings Gear** > **User Admin** > **Identity Verification Admin**
  2. Fill out all the information to verify the licensed provider's identity

- **Upload Identity Documents to athena**

  1. Navigate to **Settings Gear** > **Practice Manager Admin** > **Practice Files**
  2. Click **Add New**
  3. Click **Choose file** and upload document proving the provider's identity
  4. Select appropriate category from drop down
  5. Enter notes pertaining to which provider the documentation is for
  6. Click **Save** (or **Save and Add Another** to add more documents)

Please note: Providers are unable to complete their own identity verification or update their information on the Identity Verification admin page.

B. Provider

- **Enable EPCS**

  1. Navigate to **Settings Gear** > **Clinicals Admin** > **Order Configuration** > **EPCS Setup Admin**
  2. Accept terms & conditions
  3. Go to **User Profile** > **Identity Verification (link on page)**
  4. Accept terms & conditions

- **Set up 2 Factor Authentication Token**

  1. Outside of athenaNet: Navigate to the appropriate app store on your mobile device and download **Symantec VIP Access**.

- **Set up Credential ID**

  1. Navigate to **Settings Gear** > **My Configurations** > **User Profile** > **Credentials**
  2. Click **add new**
  3. Enter **Credential ID** (include the SYMC before the numerals, no spaces) from phone
  4. Enter athenaNet **password**
  5. Enter six-digit **security code** from phone
  6. Click **Submit** - you should receive confirmation that it was successfully added

- **Request and validate confirmation code**

1. Navigate to **Settings Gear** > **My Configurations** > **User Profile** > **Identity Verification Tab**
2. Double check the email on file then select **request code**, which will send a 6-digit code to that email
3. Enter the code into the *Validate Confirmation Code* field
4. Click **validate code**

C. Non Provider Approver (can be same as Trusted Individual)

- **Approve EPCS enrollment - first approval**

  1. Navigate to **Settings Gear** > **Clinicals Admin** > **Order Configuration** > **EPCS Enrollment Approval**
  2. Check off the **approve** box next to the provider's name
  3. Click **Save** - the request will now be marked as "second approval pending"

D. Provider

- **Approve EPCS enrollment - second approval**

  1. Navigate to **Settings Gear** > **Clinicals Admin** > **Order Configuration** > **EPCS Enrollment Approval**
  2. Check off the **approve** box next to provider name
  3. Enter <**athenaNet password**> and <**Security Code from VIP Access App**>
  4. Click **Save**

Note:

- A provider can not verify themselves or update their own information on the Identify Verification page.
- After these steps are completed, it will can take up to **5 business days** before the provider can use EPCS.
- Because EPCS is completed via Surescripts, ensure a Surescripts Provider ID (SPI) is on file for the provider prior to attempting to utilize EPCS. Refer to [How to enroll a provider in Surescripts](#) for the steps to complete the request.