

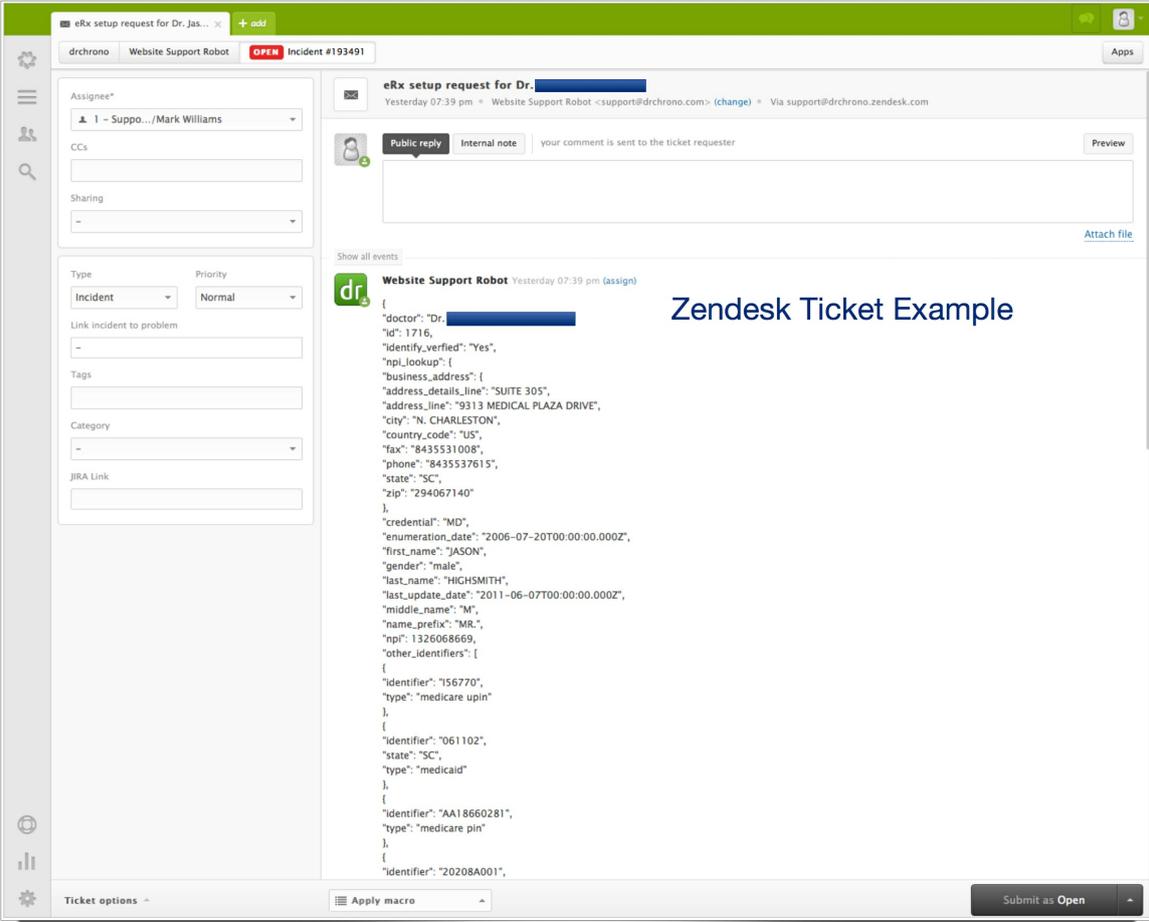
INTERNAL: How to Activate a Provider's eRx Feature Upon Registration

07/24/2024 5:50 pm EDT

Follow the steps below to learn how to activate a provider's eRx.

Please Note: The provider **must** first fill out the eRx information from within their account before this process can start. This is not something you can do for them. If you need help directing the provider with where to start click [here](#).

- 1.) Log in to both your DrChrono and Zendesk account.
- 2.) Once the doctor has filled out the required eRx info from their account an automated ticket will be created in Zendesk with the subject line "ID.me eRx setup request for [Doctor's Name]"



The screenshot displays a Zendesk ticket interface. The ticket title is "eRx setup request for Dr. [redacted]". The ticket was created yesterday at 07:39 pm by the Website Support Robot. The ticket is currently open and assigned to the Website Support Robot. The ticket content shows a public reply from the Website Support Robot with a JSON payload containing doctor and patient information. The JSON payload is as follows:

```
{
  "doctor": "Dr. [redacted]",
  "id": 1716,
  "identify_verified": "Yes",
  "npi_lookup": {
    "business_address": {
      "address_details_line": "SUITE 305",
      "address_line": "9313 MEDICAL PLAZA DRIVE",
      "city": "N. CHARLESTON",
      "country_code": "US",
      "fax": "8435531008",
      "phone": "8435537615",
      "state": "SC",
      "zip": "294067140"
    },
    "credential": "MD",
    "enumeration_date": "2006-07-20T00:00:00.000Z",
    "first_name": "JASON",
    "gender": "male",
    "last_name": "HIGHSMITH",
    "last_update_date": "2011-06-07T00:00:00.000Z",
    "middle_name": "M",
    "name_prefix": "MR",
    "npi": 1326068669,
    "other_identifiers": [
      {
        "identifier": "156770",
        "type": "medicare upin"
      },
      {
        "identifier": "061102",
        "state": "SC",
        "type": "medicaid"
      },
      {
        "identifier": "AA18660281",
        "type": "medicare pin"
      }
    ],
    "identifier": "20208A001"
  }
}
```

- 3.) Hover your cursor over the Swords icon in CRM and select "Setup/Enrollment" from the drop down list.
- 4.) Under the eRx section click on "eRx Prescriber Setup"

1.) Click on 'Setup/Enrollment'

The screenshot shows the 'dr chrono' web application interface. At the top, a navigation bar includes 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', and 'Help'. A search bar is located on the right. The main content area is titled 'Setup / Enrollment' and is divided into several sections: 'Initial Implementation' (with an 'Implementation Form' button), 'Billing' (with 'Simple Enrollment' and 'Assign Medical Biller' buttons), 'eRx' (with an 'eRx Prescriber Setup' button), 'Labs' (with 'Quest', 'LabCorp', 'Fax line', and 'Upload LabCorp Payers File' buttons), and 'Import' (with 'Patients', 'Fee Schedules', and 'Custom Procedures' buttons). A right-hand sidebar menu is open, showing categories like 'ACCOUNT MANAGEMENT', 'INTERNAL TOOLS', 'FINANCIAL TOOLS', 'DASHBOARDS', and 'GLOBAL SETTINGS'. The 'INTERNAL TOOLS' section is highlighted, and a blue box with an arrow points to the 'Setup / Enrollment' option. Another blue box with an arrow points to the 'eRx Prescriber Setup' button in the main content area.

2.) Click on 'eRx Prescriber Setup'

- 5.) Enter in the doctors name into the search field and choose from the drop down list.
- 6.) Click the "Prescribers" drop down > Choose "Create New Location" from the drop down list.
- 7.) Use the information from the Zendesk ticket to fill in all the given fields.

Please Note: You are required to verify the NPI # by clicking [here](#). You **MUST** do this prior to saving the information.

****When entering an Address there are no special characters allowed, or hyphens when entering in a phone/fax number.****

dr chrono

Schedule Clinical Patients Reports Billing Account Help

Search

Manage Surescripts Prescribers

for Dr. drchrono Knowledge Base (drchronoknowledgebase: drchronoKnowledgeBase@gmail.com)

Select Doctor

Plan/Payment Details

Required Billing Info

Prescribers **✓ Create New Location**

1.) Select 'Create New Location'

Prefix name

First name drchrono * Required

Middle name

Last name Knowledge Base * Required

Suffix name

Specialty code primary AMA speciality code

Dea

DEA Number of the prescriber. Required for Controlled Substance prescribing. 9 character DEA number must be presented with optional suffix separated by the '-', e.g. AA0000001-123XX

Npi * Required. Individual (not organizational) NPI of the prescriber.

State license number State License Number of the prescriber

Dentist license number

File id

Medicaid number

Medicare number

Ppo number

Prior authorization

Social security number If entered, format is 123456789

Upin

Office name * Required. Name of the practice where the prescriber sees the patient

Address line1 * Required. Must be physical street address. P.O. Box is not allowed

Address line2 P.O. Box is not allowed.

City * Required

2.) Use information from Zendesk ticket to fill out

8.) At the bottom of the page check the box "New Rx" and "Refill" then click 'save'.

- New Rx:

- Refill:

9.) Click the "Synchronize with Surescripts" button. If the information is incorrect, this option will not appear.

Service Level:

- New Rx:

- Refill:

[Save](#) [Change SPI #](#)

Please **SAVE** any changes before syncing with Surescripts.

[Sync with Surescripts](#) ← Click 'Sync with Surescripts'

10.) A notification "Prescriber has been successfully synced with Surescripts" will appear.

Service Level:

- New Rx:

- Refill:

[Save](#) [Change SPI #](#)

Please **SAVE** any changes before syncing with Surescripts.

Prescriber has been successfully synced with Surescripts. ← **Success**

11) Should you receive a SureScripts 900 error message please reach out to a customer support.

Service Level:

- New Rx:

- Refill:

- Controlled Substance:

Save

Change SPI #

Please **SAVE** any changes before syncing with Surescripts.

Sync with Surescripts

Surescripts error: 900: Refill service already assigned to spi: 6645970240001

Customer Support workflow:

- Contact provider to verify if they want to maintain their e-prescribing relationship with their current vendor.
 - If yes- please advise the provider that they will only be able to send NewRx from their DrChrono location, but they do have the option to receive faxed refills.
 - If no -a ticket will need to be submitted to SureScripts to have the current location switched to DrChrono.
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