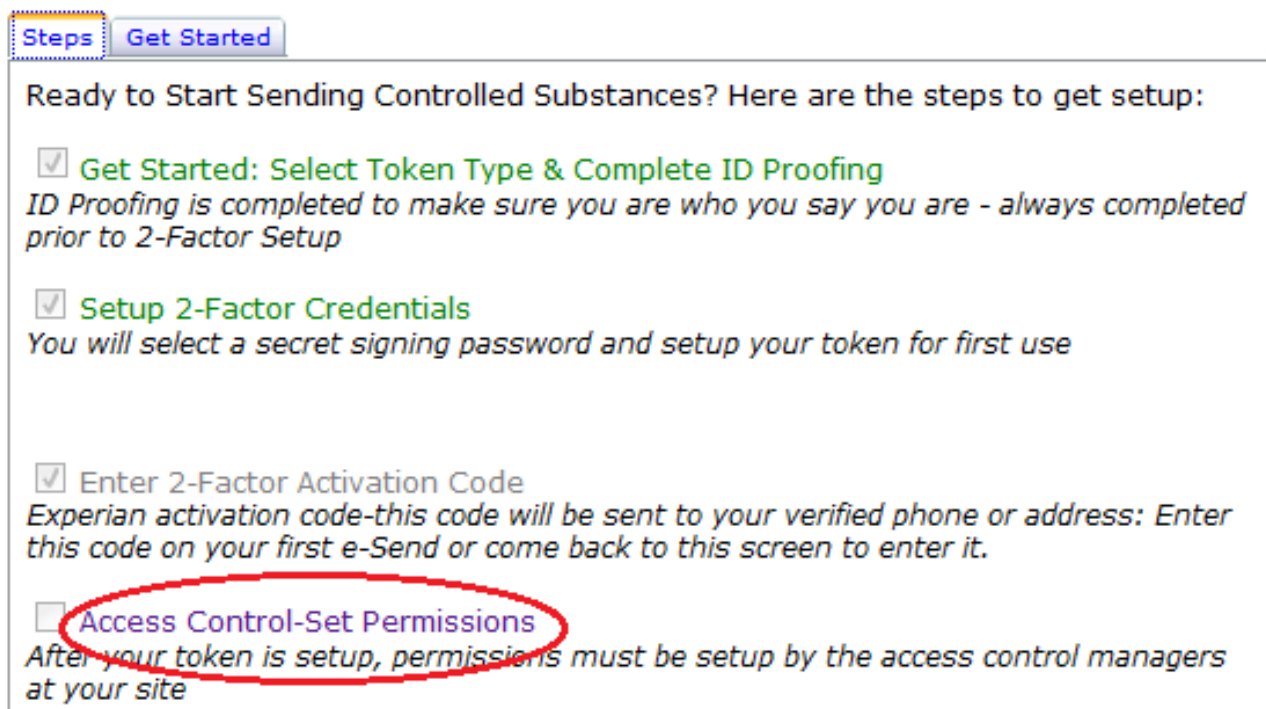


eRX - Access Control - Set Permissions

373 [TDO KB](#) November 18, 2025 [Electronic Prescribing \(eRX\)](#) 9.68K

Overview

The EPCS Access Control screen allows you to set up the security settings for EPCS.



The screenshot shows a web interface with two tabs at the top: "Steps" (highlighted with a red dashed border) and "Get Started". Below the tabs is a box titled "Ready to Start Sending Controlled Substances? Here are the steps to get setup:". Inside this box, there are four checklist items, each with a checkbox and a description:

- ☒ **Get Started: Select Token Type & Complete ID Proofing**
ID Proofing is completed to make sure you are who you say you are - always completed prior to 2-Factor Setup
- ☒ **Setup 2-Factor Credentials**
You will select a secret signing password and setup your token for first use
- ☒ **Enter 2-Factor Activation Code**
Experian activation code-this code will be sent to your verified phone or address: Enter this code on your first e-Send or come back to this screen to enter it.
- ☐ **Access Control-Set Permissions**
After your token is setup, permissions must be setup by the access control managers at your site

The "Access Control-Set Permissions" item and its description are circled in red.

Per the DEA rule for Controlled Substance Access Control, two users are required in order to save changes to this screen. You must get a second user that will authorize the changes. One of the users must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials. The other user can be any user that has been added to the account that has Admin permissions. This does not need to be a prescriber; it can be a nurse, office manager, etc.

The steps to complete Access Control vary slightly depending on whether a prescriber with an EPCS token or another user is signed in.

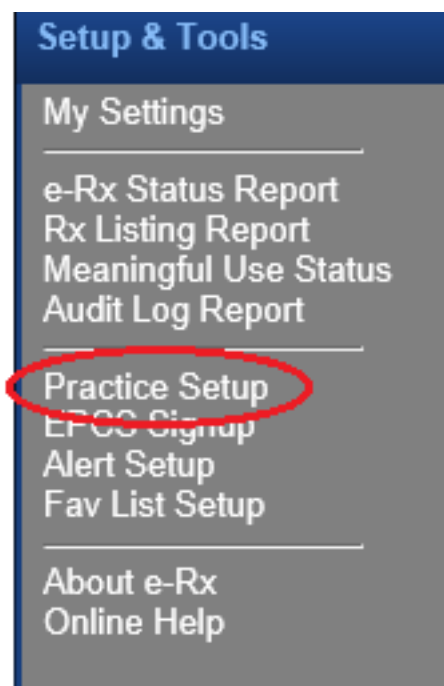
Steps to Set Up Access Control if you are a Prescriber with an EPCS Token

During the E-Prescription setup, make sure to log on to TDO with a username other than the username used by the Doctor to logon to TDO. Please have a staff member who has "Full Permission" in eRX (adjusted in Administrative > Add/Edit Usernames and Passwords) to log on in order for Doctor to finish the Controlled Substance setup.

1. Go to Prescription
2. Click on “**eRx**” button
3. Click on the two right brackets



4. Go to **Setup & Tools**, click **Practice Setup**.



5. Go to the **Settings** Tab and click **Open Access Control**

Contact Info	Prescribing Locations	Prescribers	Staff	Settings	Data Sync
Patient Data Emergency Access Authorization Code:			2550 (leave blank for no emergency access to PHI)		
Inactivity Auto-Logout Minutes:			30 (enter # of minutes sessions can sit idle before auto logging out)		
Auto Update Meds Historical When Expired:			☐ (system will automatically change Current Rx status to Historical when days supply + (days supply * refills) is up)		
Force 2-Factor sign of all Rxs (not just controlled):			☐		
EPCS Access Control Setup:			Open Access Control		

Setup & Tools -> Practice Setup -> Settings

6. Select the Prescriber who will Approve Changes/Sign off from the drop-down. Please select the Provider.

Electronic Prescription Controlled Substances - Logical Access Control Setup

Save

Per the DEA rule for Controlled Substance Access Control, two users are required in order to save changes to this screen.
- One user must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials.
- The other user can be either a prescriber or staff admin (a user with admin permissions).

Users Signing Off on Access Control Changes:

First User (Prescriber w/Token): -Select Approval Prescriber-
(when you press save, this prescriber must sign off with their token)

Second User (Prescriber or Admin): admin

Warning: No Prescribers have signed up for EPCS at your Practice yet - You will need at least one EPCS Prescriber in order to Save Changes on this page. Prescribers who will be doing EPCS should login to the program and go to the EPCS Sign up screen in the Setup & Tools menu.

7. Select the Second User (Staff with full permission for eRx)

Electronic Prescription Controlled Substances - Logical Access Control Setup

Save

Per the DEA rule for Controlled Substance Access Control, two users are required in order to save changes to this screen.
 -One user must be a Prescriber who has signed up for EPCS and can sign off on the changes with their Two Factor Credentials.
 -The other user can be either a prescriber or staff admin (a user with admin permissions).

Users Signing Off on Access Control Changes:

First User (Prescriber w/Token): -Select Approval Prescriber-
 (when you press save, this prescriber must sign off with their token)

Second User (Prescriber or Admin): admin

Warning: No Prescribers have signed up for EPCS at your Practice yet - You will need at least one EPCS Prescriber in order to Save Changes on this page. Prescribers who will be doing EPCS should login to the program and go to the EPCS Sign up screen in the Setup & Tools menu.

8. In the grid at the lower section, check the box for each user that will have permissions or help with managing EPCS.

NOTE: Make sure to select all the boxes for the Provider

Permissions					
	Has Validated Token	Access Control Manager	Authorization Verifier	Allowed to mark Ready to Sign EPCS	Allowed to Sign and Send EPCS
Jane Doe Admin	☐	☒	☒	☐	☐
John Smith MD	☒	☒	☐	☒	☒

A. Has Validated Token: This column is read-only and indicates which users have a registered EPCS token.

B. Access Control Managers: Designate at least two users who will be in charge of managing access control (who can edit this screen) (at least one user must be a Prescriber who has signed up for EPCS).

C. Authorization Verifier: Select which Access Control Manager(s) will be in charge of verifying DEA registration and State Authorization(s) as needed. This user must sign off that they have verified each Prescriber allowed to sign as having current good standing controlled substance registrations. This user is legally responsible for continually verifying that Prescribers are in good standing and will immediately revoke privileges if:

- The Prescriber's token or password is lost, stolen or compromised.
- DEA registration expires.

iii. DEA registration is revoked, terminated or suspended

iv. no longer authorized e.g. leaves the practice

D. Allowed to mark Ready to Sign EPCS: Select which Users are allowed to mark controlled substances "ready to sign". Only users with Full RX permissions and prescribers are allowed to mark CS prescriptions.

E. Allowed to Sign and Send EPCS: Select which Prescribers are currently authorized send EPCS prescriptions (if they have signed up for EPCS Two Factor credentials using the Sign-up in the Setup menu).

5. Press **Save** to save the changes. This will pop-up the 2 Factor Credentials Sign off for the provider selected at the top to approve the changes. The provider will need to open their mobile app or use their key fob and enter the password for final approval of the permissions.

A. The sign password is the password created during EPCS sign-up.

B. The VIP Security code is the code generated by your key fob or software token app.

C. Once those are entered, click Sign + Authorize

--Sign-- close X

Controlled Substance Signoff Required

Prescriber:	John Smith MD DEA#BP6089428 1111 20th Street, NW Denver CO 20526
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By completing the two-factor authentication protocol at this time, you are legally signing off on changes to EPCS access control. You agree that you have reviewed the changes made to Access Control and you give your authorization.

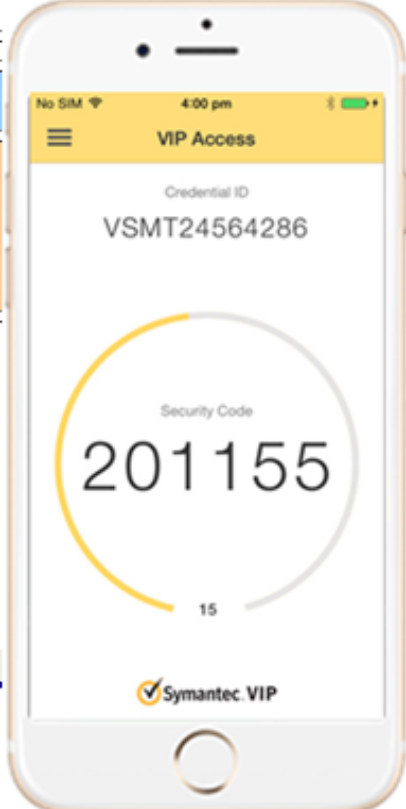
Sign Password:	
VIP Security Code:	Enabled by:  Symantec. Validation & ID Protection

Sign+Authorize **Cancel**



Security Code

Press and release to generate a security code



Need more information?

For more information, please refer to <https://live.mdtoolbox.net/rx/help/index.htm> (external link)

Online URL: <https://kb.tdo4endo.com/article.php?id=373>