Electronic Prescriptions (eRx) - How to Sign Up and Schedule Training

761 TDO KB September 4, 2026 Electronic Prescribing (eRX), New User resources 8.75K

Overview

This article explains how to sign up a doctor for electronic prescriptions (eRx). More information and pricing for eRx can be found here.
In TDO, you will have an eRx button to click on that launches the MDToolbox interface where you enter and send the prescriptions. The prescriptions that are sent will show in TDO on the Prescriptions tab.
Doctors and staff members can send regular prescriptions electronically. Controlled substances can only be sent by a doctor.

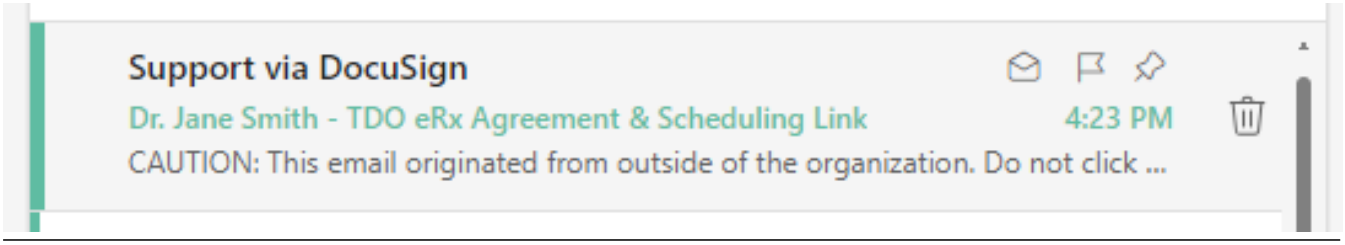
Detailed Instructions

1. Doctor Signs the eRx Contract

The prescribing doctor must sign the contract to proceed - **Click here to view/sign the contract**.
The doctor must sign the contract; it is invalid if signed by anyone else.
If setting up multiple doctors for your office, *each* doctor needs to sign their own contract to address the HIPAA items outlined in the contract.

2. Schedule a 1-hour eRx Setup and Training

After signing the contract, a link to schedule an eRx setup and training will be automatically sent to the email used to sign the contract.



Doctor Requirements

This is what is needed for the scheduled setup:

- Doctor must be present for the full setup session
- DEA #
- Cellphone

- Access to TDO
- Physical valid photo ID that matches their NPI name.
  NPI Records Search
  NPI Login
  How to Update NPI Name
- To verify the doctor's identity, please ensure the doctor knows what phone number, email, and address are associated with their Experian account.
  Identity proofing is done through Experian and does *not* count as a hard credit check.

- ***Frozen Credit:** If the doctor has frozen their credit, they must know how to log in to Experian to unfreeze temporarily.

Setup and Training Details

When / Where

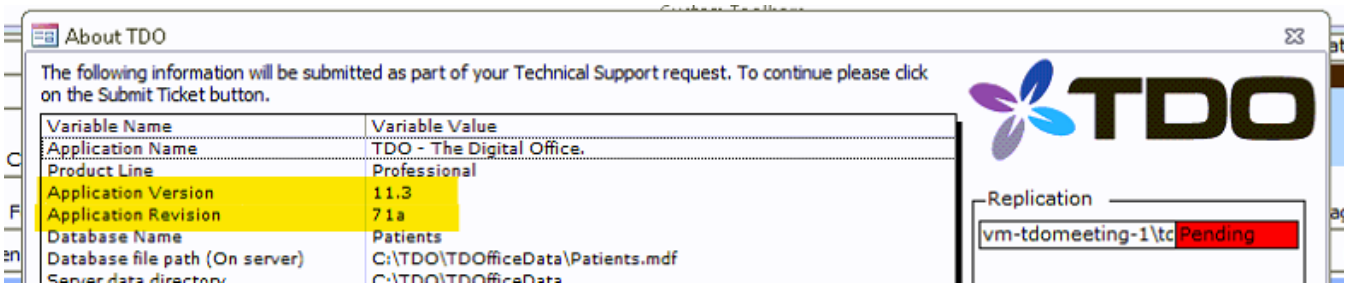
Setup and training is about **1 hour** in total. The first 30 minutes are for setup, and the last 30 minutes are for training.
We will connect to your **office computer** and conduct the training over the phone.
A link to schedule the setup will be automatically sent by DocuSign to the email address used to sign the eRx agreement.

Who

To fulfill the DEA requirements for Controlled Substance Access Control, setup requires **two people**, the doctor and a chosen Access Control Manager.
This can be an office manager, assistant, or anyone who has full eRx permissions. The second user will only be needed for **2 min** to authorize changes. **The prescribing doctor must be present for the entire session and will need their DEA # and a valid photo ID that matches their NPI name.** Log in to NPPES to view/update a National Provider Identifier (NPI) record.
If another doctor in the office is already set up with eRx, they or someone set as an Access Control Manager will need to be present to sign off.
Prescribing staff are encouraged to sit in during the training in the second half of the session.

Version Requirements

Check if your version of TDO is compatible. [Help > About TDO/Submit Ticket] and combine your Application Version and Application Revision number.



Example in picture - 11.371a

Minimum Version for Single Office - **11.347**
Minimum Version for Replicated Multiple Offices - **11.359**

Please contact support if you need to update your TDO.

Online URL: https://kb.tdo4endo.com/article.php?id=761