

# Identity Proofing (IDP)

## With Facial Recognition

In this guide, we'll walk you through the process of completing identity proofing for controlled substances. First, you'll complete IDP with facial recognition, followed by the two-factor authentication (TFA) setup.

Facial recognition is an easier, more secure, and modern touch being added to help streamline the identity proofing process. Our objective with this new feature is to reduce the waiting time and frustration of having to wait for a letter in the mail.

**NOTE:** *Please be aware that the facial recognition process is only necessary for providers who have not yet completed IDP.*

# Verification Process and Data Privacy

DoseSpot partners with Experian for identity proofing. Experian is a third-party consumer-credit reporting company that works with DoseSpot to confirm a clinician's identity. They compare the information given to them with an individual's existing credit profile to confirm their identity. **No information provided during Identity Proofing is saved by DoseSpot.**

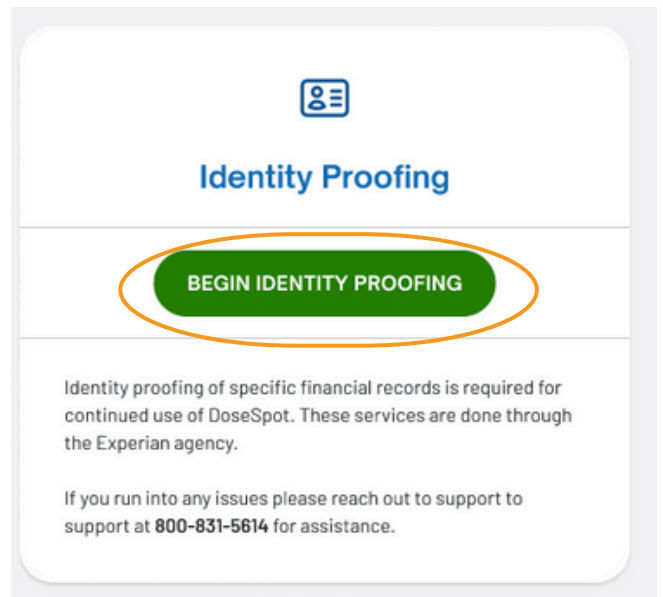
To ensure successful verification, it is crucial to provide accurate and up-to-date information. This information is used solely for identity proofing and will not be utilized for any other purpose.

**NOTE:** *Clinicians must use US-based documents to complete Identity Proofing. Documents from other countries will not be accepted*

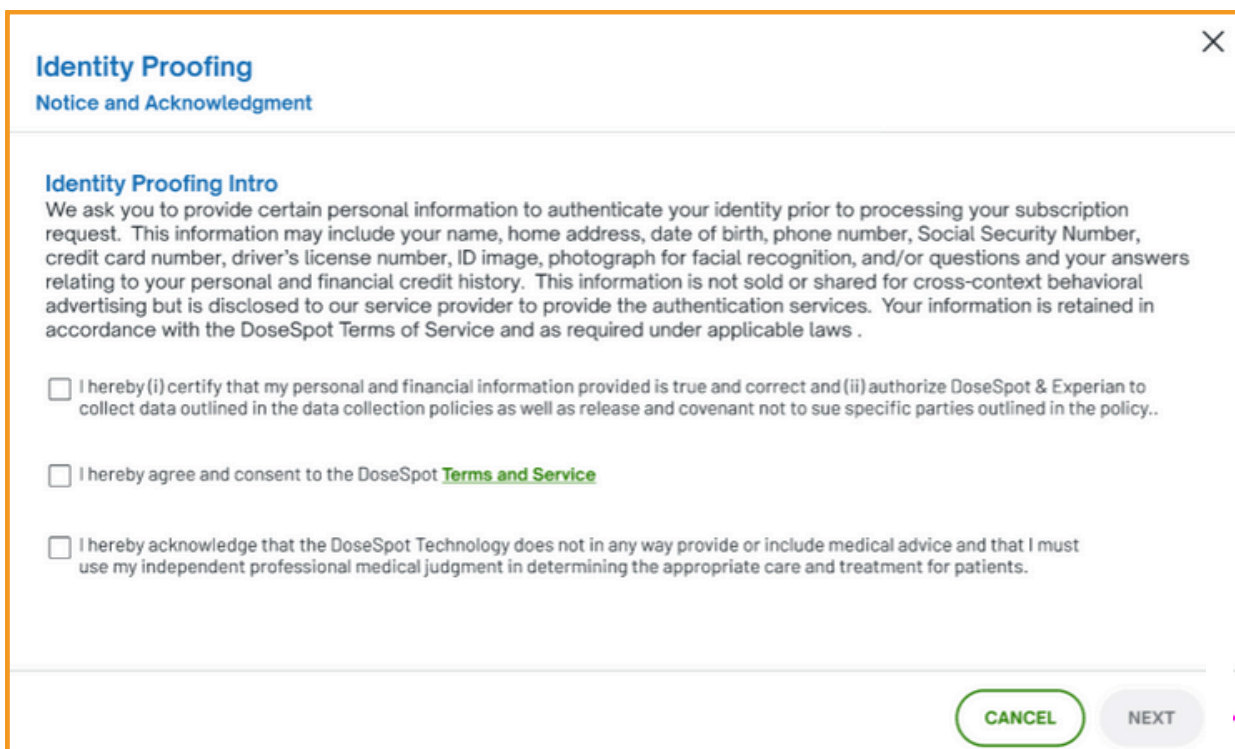
# Identify Proofing with Facial Recognition

1. After signing into your profile, you will be prompted to complete the **Identity Proofing Agreement**, initiating the IDP process. This step is crucial to maintain the highest level of security for your ePrescribing workflow.

2. Click on the green **Begin Identity Proofing** button to get started.




3. After clicking, the Notice and Acknowledgement will appear. Read through the agreement, accept the terms, and click **Next** to continue.

A screenshot of a "Notice and Acknowledgment" form titled "Identity Proofing". The form has a close button (X) in the top right corner. The main heading is "Identity Proofing Intro". Below the heading, there is a paragraph of text: "We ask you to provide certain personal information to authenticate your identity prior to processing your subscription request. This information may include your name, home address, date of birth, phone number, Social Security Number, credit card number, driver's license number, ID image, photograph for facial recognition, and/or questions and your answers relating to your personal and financial credit history. This information is not sold or shared for cross-context behavioral advertising but is disclosed to our service provider to provide the authentication services. Your information is retained in accordance with the DoseSpot Terms of Service and as required under applicable laws .". Below the text, there are three checkboxes with corresponding text:   
 I hereby (i) certify that my personal and financial information provided is true and correct and (ii) authorize DoseSpot & Experian to collect data outlined in the data collection policies as well as release and covenant not to sue specific parties outlined in the policy..   
 I hereby agree and consent to the DoseSpot [Terms and Service](#)   
 I hereby acknowledge that the DoseSpot Technology does not in any way provide or include medical advice and that I must use my independent professional medical judgment in determining the appropriate care and treatment for patients.   
At the bottom right of the form, there are two buttons: "CANCEL" (green) and "NEXT" (grey).

3. When the disclaimer is finished, you will be prompted to fill out your personal information. This information is not retained and is solely for identity-proofing purposes. Click **Next** to continue.

If required, you will then be asked four multiple-choice questions about your credit history before progressing to the facial recognition step.




### Identity Proofing

Identity Proofing Agreement > [Confirm Prescriber Information](#)

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#### Confirm Prescriber Information

To complete the identity proofing process, please confirm/complete in the following information below.

 Sensitive personal information such as social security, credit cards, etc. are used solely for the Identity proofing purposes. We do not retain this data at DoseSpot.

Legal First Name	Legal Middle Name (Optional)	Legal Last Name	Suffix (Optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Date of Birth

Address

City	State	ZIP Code
<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>

Mobile Phone Number

Social Security

Credit Card Number

Drivers License Number (Optional)

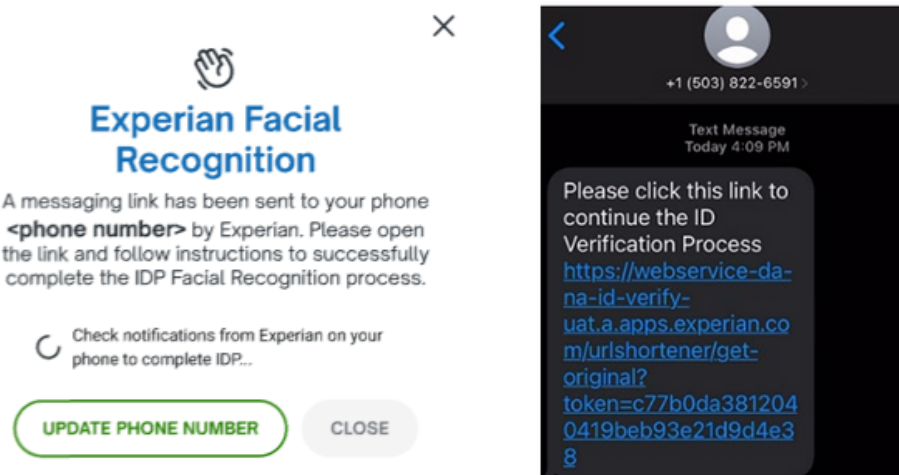
Providing a drivers license number is highly encouraged as it increases pass rate.

By checking this box, I agree to receive one time password text(s) from Experian. Message and data rates may apply.

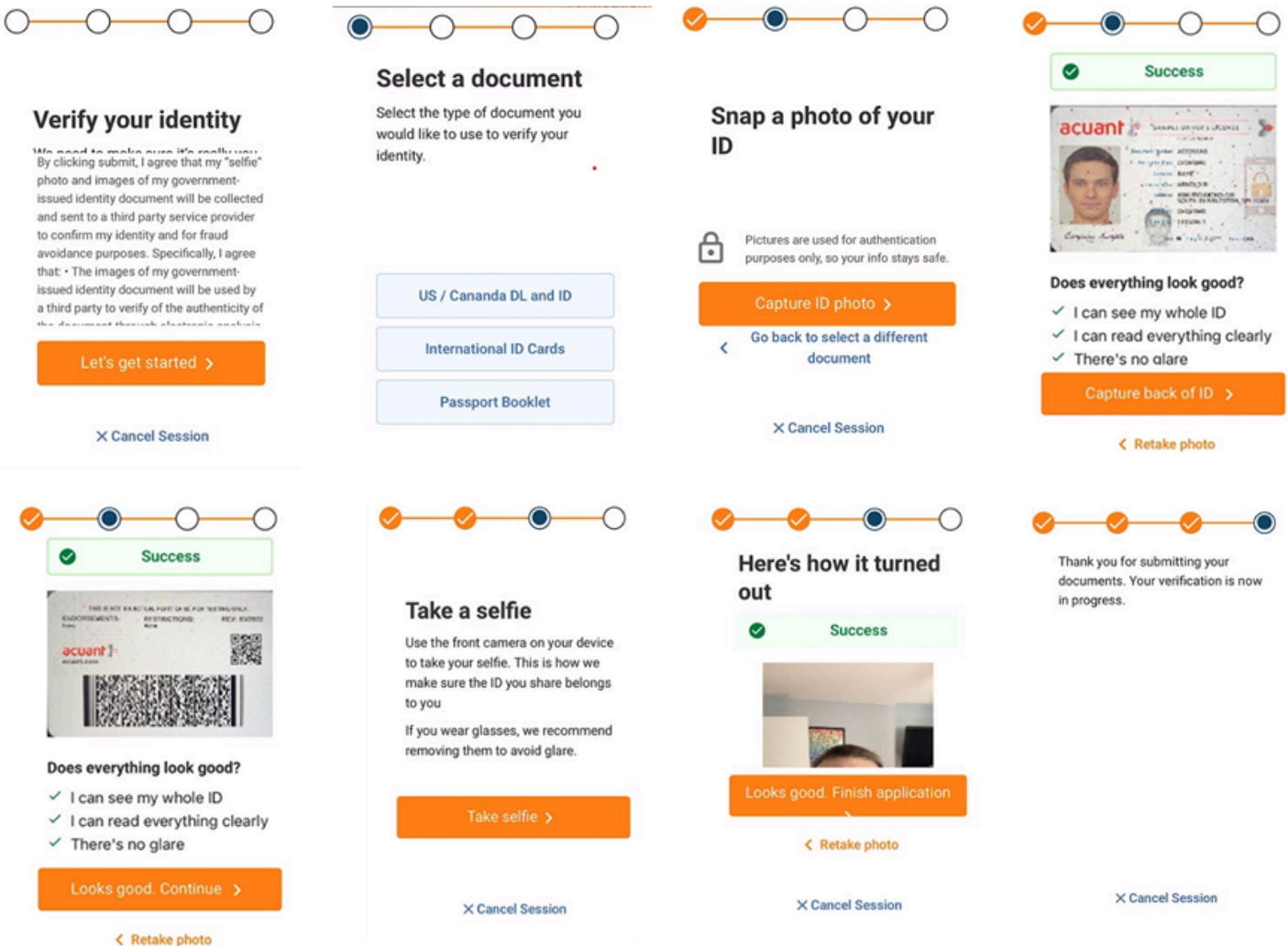
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CANCELNEXT

4. To start the facial recognition process, a link will be sent to your phone by Experian. Open the link and follow the instructions.

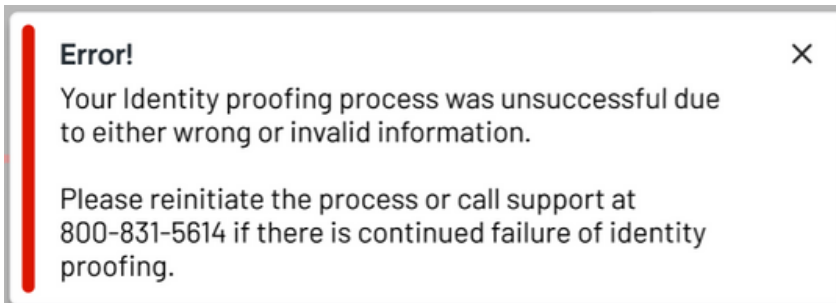
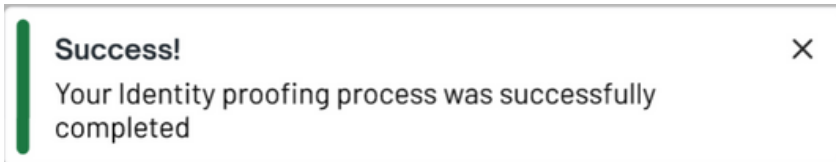


5. Below, you will see the steps that are needed to complete IDP Facial Recognition via cellphone.



6. After facial recognition has been completed on your cell phone, you will see one of two notifications in the prescribing application.

- The **green banner** shows a successful message that IDP has been completed.
- The **red banner** shows a failed IDP.



7. If you fail the Experian identity questions, you will have up to three attempts. After the third failure, we will display the link to complete the workflow using ID.me. You can access the ID.me user guide [here](#).

**Note:** Once the ID.me verification is complete, it takes up to *24 hours* for DoseSpot to update.

# Setting Up Two-Factor Authentication with DUO

## Activate DUO Mobile App

After completing the Identity Proofing process, providers must activate their **DUO Mobile Application** to finalize the EPCS and two-factor authentication setup. This activation step enables clinicians to electronically sign and send prescriptions for controlled substances.

**Important:** An admin user must initiate the EPCS/TFA activation in the DoseSpot Admin Console before the clinician can start their activation process. For more information, please refer to the *DoseSpot Admin Console User Guide* or contact your support team.

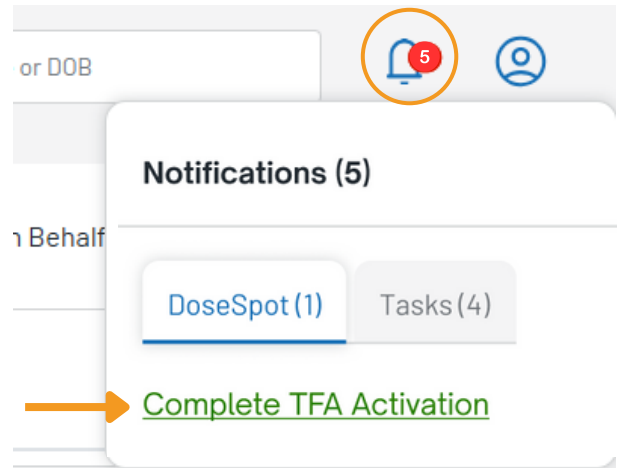
## Using DUO to Prescribe Controlled Substances

The DUO Mobile App serves as the second factor in the two-factor authentication (TFA) process. It is required during both the EPCS activation and each time a prescriber sends an electronic prescription for a controlled substance. Follow the steps below to activate your DUO Mobile app.

## DUO Mobile Activation: Step 1

Once you have completed your identity proofing, you will be able to set up two-factor authentication.

Click on the notification icon from the top navigation. Under DoseSpot, you will be prompted to **Complete TFA Activation**.



Enter the mobile number you will use for the DUO app in the box. Then, check the box to agree to receive SMS text messages. Click the **Send Me DUO Activation Texts** button to continue.

### DUO Mobile Activation

DUO Mobile Initiation



#### Intro

You have been enabled for DUO Mobile Activation. Please confirm the following information below to begin this process.

Upon clicking the "Send Me DUO Activation Texts", you will receive two texts. One is for downloading the DUO app and the other is to link you to the DoseSpot System

#### DUO Mobile Phone Info

Please enter the phone number associated with this user. Do not enter a clinic or non mobile phone number.

##### Mobile Phone Number

Phone number will be used for DUO Activation

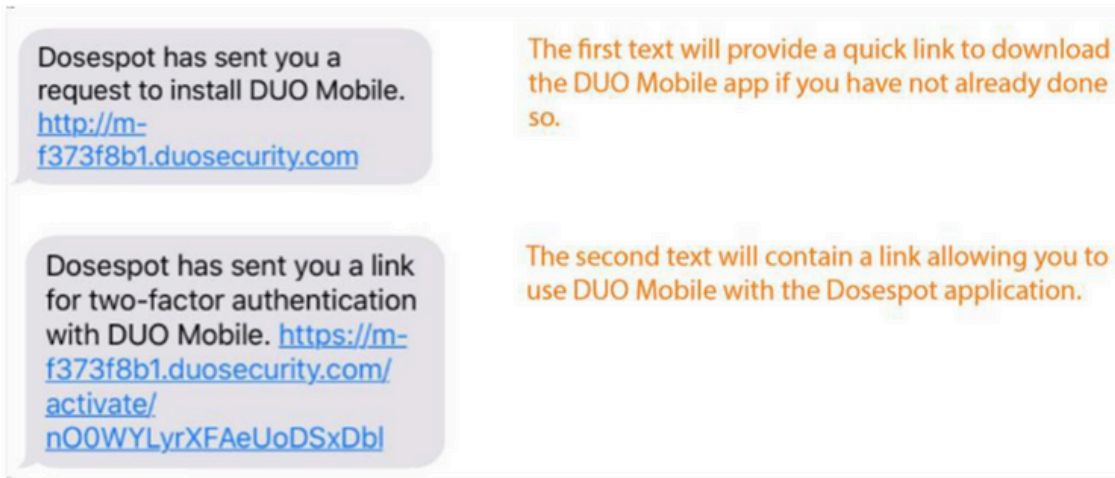
I agree to receive text messages via SMS and accept any fees from my mobile provider.

CANCEL

SEND ME DUO ACTIVATION TEXTS

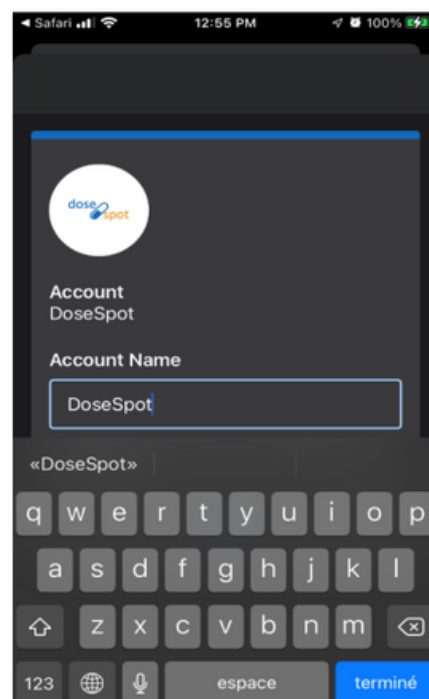
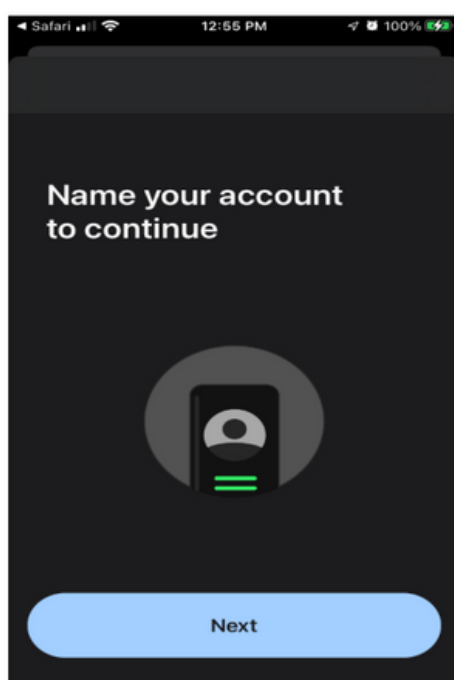
## DUO Mobile Activation: Step 2

Once your mobile number is submitted, you will receive two text messages from DUO Mobile:

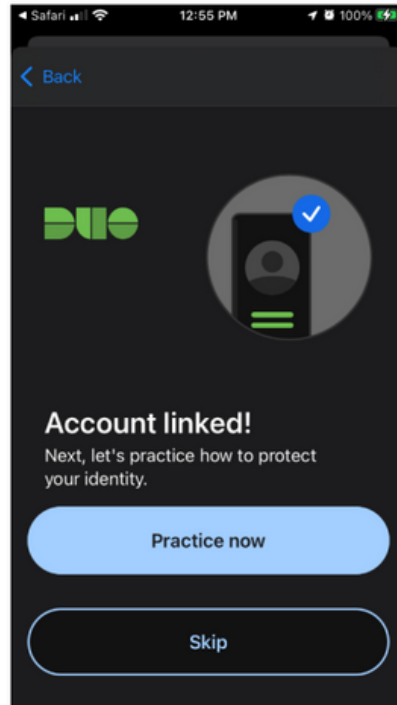


Install the DUO Mobile app if you have not already done so, then click the link in the second text message. You will be prompted to name your account. The Account Name will default to DoseSpot, but you may change this name if you choose. Fill in the account name and then click **Next**.

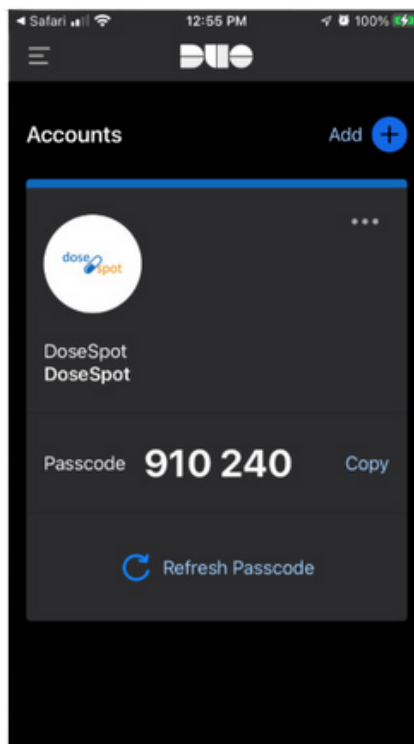
**Note:** There is no QR code authorization available. To authorize DUO to authenticate, you must click the second link sent in the DUO activation texts.



You will see a notice that DUO is now linked to your phone. If you would like to go through a tutorial on how to use DUO, click **Practice Now**. Or you can click **Skip** if you don't need to see the tutorial.



DoseSpot will now be listed in the DUO Mobile app. The six-digit number is the TFA code. The Refresh Passcode button will generate a new code. A new code is needed every time a TFA code is required in the DoseSpot application.



## DUO Mobile Activation: Step 3

Complete the TFA Authentication pop-up to activate your mobile app. If you are unsure about what to enter, use the guide below:

- The **Reference Number** will be disabled with the number pre-populated.
- The **Passcode** is the 6-digit code that is generated by the DUO Mobile app.
- If you currently use a **PIN** for sending prescriptions, enter it here. If not, you will be prompted to set one before continuing.

**TFA DUO Mobile Activation** ×

DUO Mobile Initiation > DUO Mobile Activation > [Confirm Information](#)

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**Confirm Information**

The DUO app is now synced. For the last step please confirm the following information below to complete the Authentication process .

**Reference Number**  
12345678

**Passcode**

The Passcode can be found in the DUO App

**Pin Number**

Input your 4-digit Pin number.  
[Update your Pin Number](#)

[Cancel](#) **SUBMIT**

Upon submit, you should see a **Success!** status message. You are now ready to start EPCS in DoseSpot. If you encounter an error, please continue to our Troubleshooting section.

# DUO Mobile Activation: Troubleshooting

## **What happens if I entered the wrong number?**

No worries - Client and Clinician Admins from your support team will be able to re-enter your mobile number from the Admin Console.

If additional help is required, please request that your support team open up a DoseSpot support ticket. The DoseSpot team will also be able to edit the number you entered and resend the DUO activation texts.

## **What happens if I did not receive a text?**

A Client or Clinician Admin can resend a DUO text out to a provider via the Admin Console. If the text is still not received, please confirm the correct mobile number is entered.

If additional help is required, please request that your support team open up a DoseSpot support ticket.

## **What happens if I get a new phone?**

If you back up your apps and transfer everything to your new phone, you should be able to conduct business as usual. If for some reason you no longer have the app, contact your support team to open up a DoseSpot support ticket. DoseSpot can resend the DUO activation texts.

## **What happens if I change my phone number?**

No issue at all. Open a case in Salesforce and we will be able to edit your original number and resend the DUO activation texts