

Surescripts Registration

Setting Up an Existing Environment with the Correct Customer and Facilities through Surescripts

- ❑ In production environments, there needs to be 1 entry in the **CUSTOMER** table with a valid **surescripts_organization_id** and it needs to be assigned an **address_id**.
- ❑ CCBD Process (Excludes App04 - Vault)
 - Confirm there are three entries in the **CUSTOMER** table.
 - Update all related records in the **XREF_RULE_CUSTOMER** table to use the same **customer_id**.
 - Update the **CUSTOMER** table with a valid **address_id** (placeholder is acceptable).
 - Remove duplicate customer entries, ensuring only one consolidated record remains.
 - Log in to the Surescripts Admin Console and create a new organization:
 - <https://admin-staging.surescripts.net/AdminConsole/Login?ReturnUrl=%2FAdminConsole>
 - After the organization is created, update the **CUSTOMER** table with the **surescripts_organization_id**.
 - Run the provided script to generate the NPI, NCPDP, and DEANumber.
 - If the generated NPI is invalid (the UI will not allow it to be saved), rerun the script.
 - Add the generated NPI, NCPDP, and DEANumber to the **dbo.customer** table.
 - Once the single customer record includes the **address_id**, **NPI**, and **surescripts_organization_id**, it will appear in Customer Maintenance within System Configuration.
 - Manually add the customer record to the **ORGANIZATION** table in the prod-ss-cus-sqladb database (server: prod-ss-cus-sql.database.windows.net).
 - After the record is added to prod-ss-cus-sqladb, the customer details can be fully edited in the Customer Maintenance screen within System Configuration.

Adding Facilities to the Customer

- ❑ Although facilities already exist in the **dbo.resource** table, each must be re-saved in Resource Management (System Configuration) with complete details (address, phone number, NPI, etc.) to create corresponding entries in **dbo.facility_details**.
- ❑ A valid NPI can be generated using the provided script. For CCBD Test, use the facility NPIs listed in the accompanying spreadsheet.
- ❑ Once the customer and facilities are configured, facilities can be assigned to users in the UI without issue. Each user receives a unique SPI per facility, where Service Levels are stored; this is required for ePrescribe functionality.
- ❑ A SQL script (provided below) can be used to assign non-stakeholders to facilities. This process applies only to eRX and does not impact users who are not stakeholders.

For more detailed information, please review the [Registering Client Providers with Surescripts Knowledge Article](#).