



Upgrade Kit

CONTENTS

1. Epic Implementation Tracker	3
1.1. Step 1: Project Readiness	5
1.2. Step 2: Build & Test	6
1.3. Step 3: Production Configuration	9
1.4. Step 4: Upgrade Portal - Let's Go Live!	10
1.4.1. Monitoring Your Upgrade	11
2. Configure New Portal	12

1. Epic Implementation Tracker

The Implementation Tracker is a step-by-step guide for completing your Surescripts upgrade in Epic. It organizes required activities into four clear milestones, with links and guidance to help your team stay on track through go-live.

Completing **all four steps** aligns your Epic environment with updated NCPDP and federal standards - supporting faster, safer, and compliant workflows.

Upgrades are required by January 1, 2027, for Real-Time Prescription Benefit and Formulary, and by January 2028 for other products.

This documentation should be used alongside the Epic checklist.

Understanding the NCPDP Upgrade

Which Products Are Impacted?

- E-Prescribing
NCPDP SCRIPT v2023
- Medication History
NCPDP SCRIPT v2023
- Electronic Prior Authorization
NCPDP SCRIPT v2023
- Formulary
NCPDP Formulary and Benefit v60
- Real-Time Prescription Benefit
NCPDP RTPB v13

What to Expect

Your upgrade journey consists of four key steps:

- Project readiness
- Epic build and testing
- Product configuration
- Go-Live

Each step includes specific tasks and checkpoints to ensure success.

Key Resources

Documentation

Milestones

The upgrade is completed by meeting required [steps](#) for onboarding, testing, and production deployment.

Upgrade Companion Guides

Use the [upgrade companion guides](#) to plan, implement, and complete the upgrade.

These can also be accessed via [Workbench](#).

Workbench Tools

Access Workbench (Staging)

Workbench is a web-based platform where you test, certify, and manage your Surescripts integrations across staging and production.

- [Workbench \(Staging\)](#)
- [Workbench \(Production\)](#)

Certification Tester

This is the self-driving [Certification Tester](#) built by Surescripts to support NCPDP standards upgrades.

Message Tester

Test your upgrade messages in real time. From the [Workbench \(Staging\)](#) homepage, go to Testing → Message Tester.

Directory Manager

[Directory Manager](#) allows you to manage your organization's data within the Surescripts Staging Directory, including prescribers, pharmacies, locations, service-levels and other pertinent information.

Message Search

Use [Message Search](#) to troubleshoot and review transactions for your upgrade product(s).

My Accounts and Portals

View your Surescripts connectivity and account details.

- [\(Staging\) My Accounts and Portals](#)
- [\(Production\) My Accounts and Portals](#)

Support and Standards Information

Support

[Surescripts Support](#)

Surescripts Customer Support is your direct path to expert help when issues arise.

Standards Information

[NCPDP](#)

The National Council for Prescription Drug Programs (NCPDP) defines the industry standards that govern pharmacy-related transactions such as claims, formulary, and real-time benefit exchange. Upgrade milestones in this tool align to those standards to help you track required changes and stay compliant. Official standards documentation and NCPDP membership information are available at [ncdp.org](https://www.ncdp.org).

You'll see NCPDP referenced in milestone names, descriptions, and acceptance criteria. These references indicate *which industry standard the milestone supports*, not a full list of technical requirements. Always use the official NCPDP implementation guides for detailed specifications.

1.1. Step 1: Project Readiness

Prerequisites

- Add ImplementationSupport@Surescripts.com to your safe sender list
- Identify team members who need Workbench access

Action Items

Let us know when you're ready to start!

- Send an email to ImplementationSupport@surescripts.com
- Subject: **[Your Health System] Epic v2023011, Formulary & RTPB upgrade**
- Include:
 - Desired go-live date
 - In-scope products (listed below)
 - Names and emails of team members who need **Workbench access**

In-scope products:

- Med Orders & Refills
- Medication History
- Electronic Prior Authorization
- Real-Time Prescription Benefit
- Willow Ambulatory
- Formulary & Benefits (*available on or after Feb 26*)

Our team will be in touch within 72 business hours with your completed configuration, Workbench access, and instructions for proceeding with our new Certification Tester tool.

1.2. Step 2: Build & Test

Prerequisites

- Confirm you have received a response from our Implementation Navigator team confirming your staging configuration, Workbench access, and Certification Tester assignment have been completed.

Action Items

1. Verify Connectivity

- Access connectivity details in [My Accounts and Portals](#) (URLs, authentication)

2. Send test transaction using a sample test case from Certification Tester

- Testing can begin once your build is complete and your configuration and Workbench access have been provided.
- Use Message Tester to simulate incoming messages
- Confirm successful message delivery in [Message Search](#)

Need help figuring out which checks apply to your transactions? After completing the My Accounts and Portals step, use the Crosswalk Table Template below step 3 to populate the incoming and outgoing URLs.

3. Complete Epic Build

- Follow Epic-specific build instructions from your Epic Checklist

4. When build is complete, complete test scripts per the following:

- Open [Certification Tester](#) in Workbench (Staging)
- Download test case materials
- Complete all assigned test cases at your own pace
- Validate results automatically through the tool
- Submit certification when all tests pass

A guided tour of Surescripts certification tester

A circular play button icon with a right-pointing triangle, centered over the word "Surescripts".

Need Help During Testing?

If you get stuck while running a certification test, use the **Need Help?** button in the Certification Tester.

- Available on every page of the tool
- Sends a request directly to Surescripts Support
- Includes your test details to speed up troubleshooting

Crosswalk Table Template

	Incoming URL (Health System to Surescripts)	Outgoing URL (Surescripts to Health System)
ePrescribing	Https://smr-staging.surescripts.net/erx/PORTALNAME/v7_0?id={{senderMessageId}}	YOUR OLD URL ending in /ECNCPDP2023011
ePrescribing – Willow	Https://smr-staging.surescripts.net/erx/PORTALNAME/v7_0?id={{senderMessageId}}	YOUR OLD URL ending in /WAMNCPDP2023011
Medication History	https://smh-staging.surescripts.net/medhistory/PORTALNAME/mhv4_0?id={MessageId}	YOUR OLD URL ending in /SMHNCPDP2023011
Electronic Prior Authorization	https://epa-staging.surescripts.net/epa/PORTALNAME/EPAV3_0?id={{senderMessageId}}	YOUR OLD URL ending in /ePA2023011
Real Time Prescription Benefit	https://smr-staging.surescripts.net/pmbc/PORTALNAME/RTPBv13?id={MessageId}	n/a

Need Additional Help?

If you have any additional questions or need assistance, please contact ImplementationSupport@Surescripts.com

- Sending an email to this address will create a support case for your organization. A member of our Implementation team will review your request and respond within three business days.
- This process helps ensure your questions are tracked and answered as quickly and efficiently as possible throughout your upgrade.

1.3. Step 3: Production Configuration

Prerequisites

- Certification testing completed

Action Items

1. Send an email to ImplementationSupport@surescripts.com
 - Subject should be: "{YOUR HEALTH SYSTEM] Upgrade: Ready for Production".
 - Include go-live date in the body of the email.
2. Submit a case via Case Management requesting "Update Portal Tool" access for one of your team members. This person will be responsible for "flipping the switch" and turning your group on in production at go live.

Within 72 business hours, our Implementation Navigator team will respond to your case and provide next steps. Production configuration updates may take up to 10 business days to complete, after which you will receive instructions for going live.

3. Verify Production Configuration
 - Access My Accounts and Portals in Production
 - Review connectivity settings (URLs, authentication)
 - Familiarize yourself with Production tools:
 - [Message Search](#) (31-day transaction history)
 - [Case Management](#) (support tickets)

Need Additional Help?

If you have any additional questions or need assistance, please contact ImplementationSupport@Surescripts.com

- Sending an email to this address will create a support case for your organization. A member of our Implementation team will review your request and respond within three business days.
- This process helps ensure your questions are tracked and answered as quickly and efficiently as possible throughout your upgrade.

1.4. Step 4: Upgrade Portal - Let's Go Live!

Action Items

1. Final Pre-Launch Checks

- Verify production configuration in [My Accounts and Portals](#)
- Confirm team knows how to submit support cases
- Be as specific as possible with Go-Live timing

2. Activate Upgrade

- Use Update Portal Tool in Workbench (Production)
- Execute Go-Live on your planned date

3. Post-Go-Live

- Monitor transactions via [Message Search](#)
- Submit support cases via Case Management for any issues
- Transition to standard support process with Customer Experience team

Contacting Support After Go-Live:

- Include: org name, contact info, product name, error message/Message ID, preferred contact method
 - Urgent issues: Submit case at <https://community.surescripts.net/home>
 - Non-urgent: Email support@surescripts.com or call 1-866-797-3239

1.4.1. Monitoring Your Upgrade

Congratulations! You've completed your upgrade. You can now monitor activity in Workbench Production.

Message Search

View the past 31-Days of your organization's transactions on the Surescripts network.

[Message Search](#)

Message Dashboard

Provides an overview of your organization's transactions in Production, helping you monitor activity, identify issues, and troubleshoot errors.

[Message Dashboard](#)

Contacting Support After Go-Live:

- Urgent issues: Submit case at [Case Management](#)
- Non-urgent: Email support@surescripts.com or call 1-866-797-3239
- **Include:** org name, contact info, product name, error message/Message ID, preferred contact method in your case or email.

✓ Going back to a previous version

If needed, you can return to a previous version of your configuration:

- For a **full rollout**, go to **Update Portal** and select the previously active version.
- For a **phased rollout**, reassign Prescriber and Pharmacy records using the previous Portal ID.

2. Configure New Portal

During an Epic upgrade, your organization will need to switch from one existing portal configuration to another—such as activating a new version that has already been built and tested. The Update Portal Tool lets you activate a new portal configuration when you're ready, without waiting for Surescripts assistance.

What This Means

The Update Portal Tool allows you to activate a new portal configuration directly in Surescripts Workbench at the moment you choose—typically during a scheduled go-live or cutover.

Once you activate a configuration, it becomes effective immediately for that portal.

Why You're Seeing This

You are being directed to the Update Portal Tool because a new portal configuration is already prepared and available for your Epic environment.

This commonly occurs when:

- You are completing a planned Epic upgrade or version change
- A configuration update has been built in advance
- Your team controls the final activation timing

Recommended Action

Use the Update Portal Tool in Workbench to activate your new portal configuration by following the steps below.

Access the Update Portal Tool

1. Sign in to [Surescripts Workbench](#) using your existing credentials.
2. Open Directory Manager.
3. Under Update Portal, select Search.

If you do not see the Update Portal option, your account may not have access to this tool.

Locate Your Portal

1. Use the search fields to find your portal.
 - Search by account to view all associated portals, or
 - Enter a specific portal name
2. Select the portal name to open the Portal Detail page.

Activate a New Portal Configuration

1. On the Portal Detail page, select the appropriate Message Category tab.
2. Review the available portal configurations.
3. Select the Active option next to the configuration you want to enable.

4. Select Update.
5. When prompted, confirm the change.

The update takes effect immediately.

If multiple Message Categories require updates, repeat the same steps for each one.

Revert to a Previous Configuration (If Needed)

If you need to roll back, follow the same steps and select a previous configuration to make it active again.

When to Contact Surescripts

Contact Surescripts if:

- You do not see the Update Portal Tool and believe you should have access
- The portal or configuration you expect to activate is not available
- The change does not appear to take effect after confirmation
- You have questions related to an active Product Implementation engagement

When contacting support, be prepared to provide:

- Portal name
- Configuration you attempted to activate
- Approximate time of the change