DoseSpot Integration Configuration Guide for Lightning Step

This guide will walk you through the major phases for configuring New Medications (V2) for a customer: including understanding foundational concepts, setting up the DoseSpot Admin Portal, configuring the Lightning Step platform, and completing the final user setup. By following these steps sequentially, you will ensure a successful, secure, and compliant implementation.

PLEASE NOTE: For customers transitioning from Old Meds to New Meds, there are some additional considerations.

1.0 Foundational Concepts and User Roles

Before beginning the configuration, it is essential to understand the core terminology and user roles that govern the DoseSpot integration. This knowledge is foundational to making correct decisions during setup and assigning appropriate privileges to staff.

The following table defines the key DoseSpot user roles and concepts you will encounter throughout this guide.

Term	Definition and Significance
Prescribing Clinician	An authorized clinician who can electronically prescribe both non-controlled and controlled substances. They send prescriptions as themselves and are required to use a 4-digit PIN for all prescriptions. For controlled substances, they must also provide a One-Time Passcode (OTP) after completing an identity-proofing process.
Prescribing Agent	A clinical staff member authorized to send prescriptions for non-controlled substances *on behalf of* a Prescribing Clinician. They cannot prescribe controlled substances and are required to use a 4-digit PIN to send any prescription.

Individual Proxy	A user role with limited permissions. An Individual Proxy can create and prepare prescriptions but does not have the authority to send them to a pharmacy. This role is useful for workflows where medication entry is delegated to non-prescribing staff.
Global Proxy	A Lightning Step term for a specific, dummy DoseSpot proxy user. Neither DoseSpot nor customers will see this in their day-to-day. This role is a mandatory requirement for all Lightning Step sites, even those not using e-prescribing. Its purpose is to enable LS to call DoseSpot API endpoints for essential functions like medication searches, allergy creation, and pharmacy management without requiring every user to have an individual DoseSpot ID. **You do not need to create a Global Proxy user. Lightning Step has a default, dummy account that you can use for all customer sites. However, you do need to link this dummy account to each customers' DoseSpot clinic within DoseSpot. See section 2.2 below.**

With a clear understanding of these roles, you can now proceed to the first practical step: creating the necessary accounts within the DoseSpot Admin Portal.

2.0 Part 1: DoseSpot Admin Portal Configuration

This first phase of the configuration process must be completed within the DoseSpot Admin Portal. These initial steps are prerequisites for any setup within Lightning Step, as they establish the clinic and clinician accounts that the platform will later connect to.

Action: Log into the DoseSpot Admin Portal Navigate to the appropriate URL for your environment:

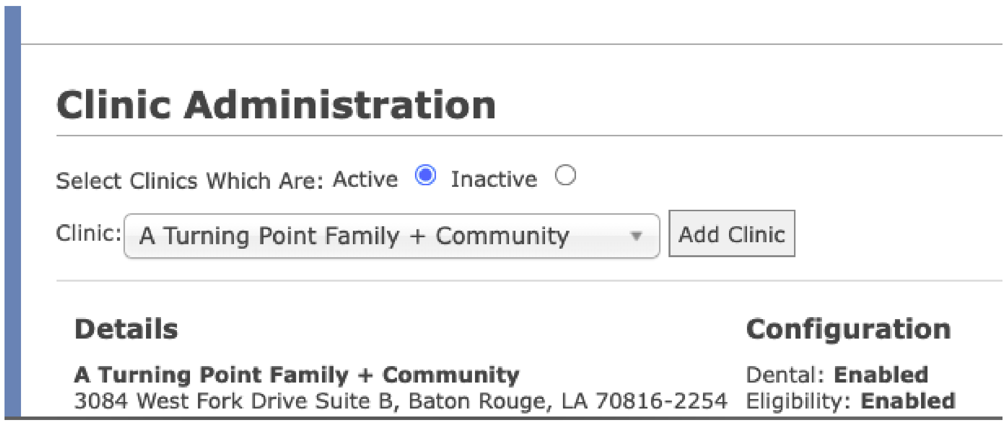
- **Production:** https://pss.dosespot.com/Admin/Account/Login

2.1 Create the DoseSpot Clinic(s)

1. Navigate to the DoseSpot Admin console.
2. Click Add Clinic
3. Enter Clinic Name, Address, Phone & Fax
    a. If your customer has multiple locations, it is up to the customer's decision if they need to have separate DS Clinics.
    b. For example, say you have Newport as an overall organization but Newport has Clinic A, B, C, and D. The customer must tell you whether all clinics A-D are prescribing.

    i. If all 4 prescribe, that means there will be 4 DoseSpot clinics created.
    ii. If 2 clinics prescribe, then only 2 DoseSpot clinics are created.
    iii. If your customer is not prescribing at all and only needs to use our MAR/MOR then you only need 1 location in DS.

4. Once all necessary clinics are created, you can start adding clinicians.



2.2 Link the Universal Global Proxy to the New Clinic(s)

1. In the DoseSpot portal, search for the clinician called "API Proxy" with ID 661440
2. Click Edit > Clinic Info
3. Select the new clinic you created
4. Click Add
5. Repeat for all new clinics you created

   NOTE: As of November 2025, we can now use this universal Global Proxy ID of 661440. However, if you have a customer migrating from Old Meds to New Meds, this means they previously identified a user to be used as the Global Proxy. You can continue to use their previous Global Proxy, or update their configuration in step 3 to use the new universal ID.

2.3 Create Clinician Accounts

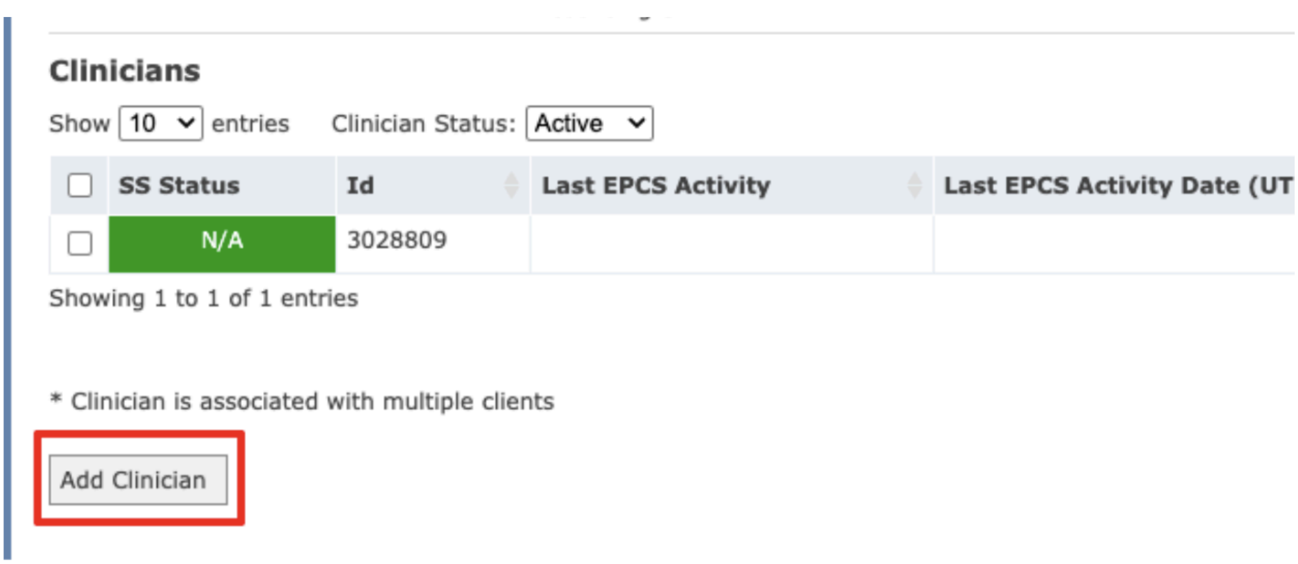
After the clinic is created, you must add the necessary clinician accounts.

1. **Create Prescribing Clinicians:** For each prescribing clinician, enter the required information: First Name, Last Name, DOB, Email, National Provider Identifier (NPI), and DEA number (if applicable).

2. **Create Prescribing Agents:** For each prescribing agent, enter the required information: First Name, Last Name, DOB, Email, and NPI.

3. **Create Individual Proxies:** For each proxy, enter the required information: First Name, Last Name, DOB, and Email.

IMPORTANT: If your customer is using Entities, DoseSpot users must be linked to all DoseSpot clinics within the portal. This is different from the standard non-Entities setup, in which users only need to be linked to the clinic that is used for apivendor setup in Lightning Step.



Once all clinics and users have been created in DoseSpot, the next phase involves configuring the Lightning Step platform to establish the connection and enable the integration features.

3.0 Part 2: Lightning Step Platform Configuration

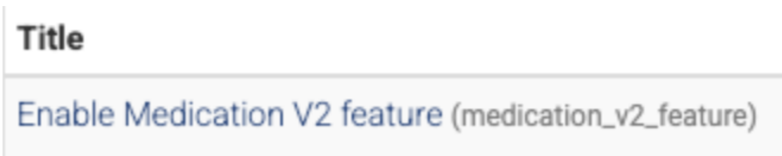
With the necessary DoseSpot entities established, the focus now shifts to configuring the Lightning Step platform. This phase involves setting up the system, location, and user-level settings that will connect with DoseSpot and activate the new medication management features. Precision is paramount in this section, as incorrect API credentials or IDs will cause the integration to fail.

3.1 System-Wide Configuration

The following steps apply globally across your entire Lightning Step instance and establish the foundational link between the two systems.

3.1.1 Enable the Medication V2 Feature

1. Navigate to System Config > lsconfig in your Lightning Step instance.
2. Locate and turn on the setting titled **Enable Medication V2 feature**.



3.1.2 Configure API Vendor Settings

This is the most critical technical step of the configuration. Here, you will enter the specific API credentials from DoseSpot into Lightning Step to authorize communication between the two systems. You must configure one apivendor entry: DoseSpotV2.

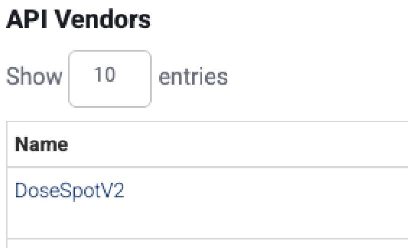
NOTE: As of November 2025, the original DoseSpot apivendor (not DoseSpotV2), is no longer required for customers who are using New Meds. However, you do not need to change anything in the original DoseSpot apivendor if it was previously configured.

WARNING: This is the most failure-prone step of the integration process. Pay close attention to the details in the following tables. A single typo in any of these fields will cause the entire integration to fail.

1. Navigate to /apivendor in your Lightning Step instance to begin. For example, https://demo.lightningstep.com/apivendor.

Configuring the "DoseSpotV2" Vendor

2. Open the DoseSpotV2 vendor with the edit pencil.



LS Field	Corresponding DoseSpot Value
Base URL	https://my.dosespot.com/webapi/v2
Callback URL	https://my.dosespot.com/LoginSingleSignOn.aspx
Client ID	661440 (This is the default value created by Lightning Step. It is the same for every customer's setup, just like the Client Secret. Make sure you linked this ID to the customer's clinic within DoseSpot during step 2.2.)
Client Secret	1919bdc7acf1ccef442a6e2a127078961bfed386c892990cc254ab94b19b9611
Access Token Key	The **DoseSpot Clinic Key**. (This is the unique alphanumeric key for your clinic, found within the DoseSpot Admin Portal. If you created multiple DoseSpot clinics, you only need to choose one location to configure this setting. IMPORTANT: keep track of which clinic you selected, as you will need this information later.)
Realm ID	The **DoseSpot Clinic ID**. (This is the unique numerical ID for your clinic, found within the DoseSpot Admin Portal. If you created multiple DoseSpot clinics, you only need to choose one location to configure this setting. IMPORTANT: keep track of which clinic you selected, as you will need this information later.)

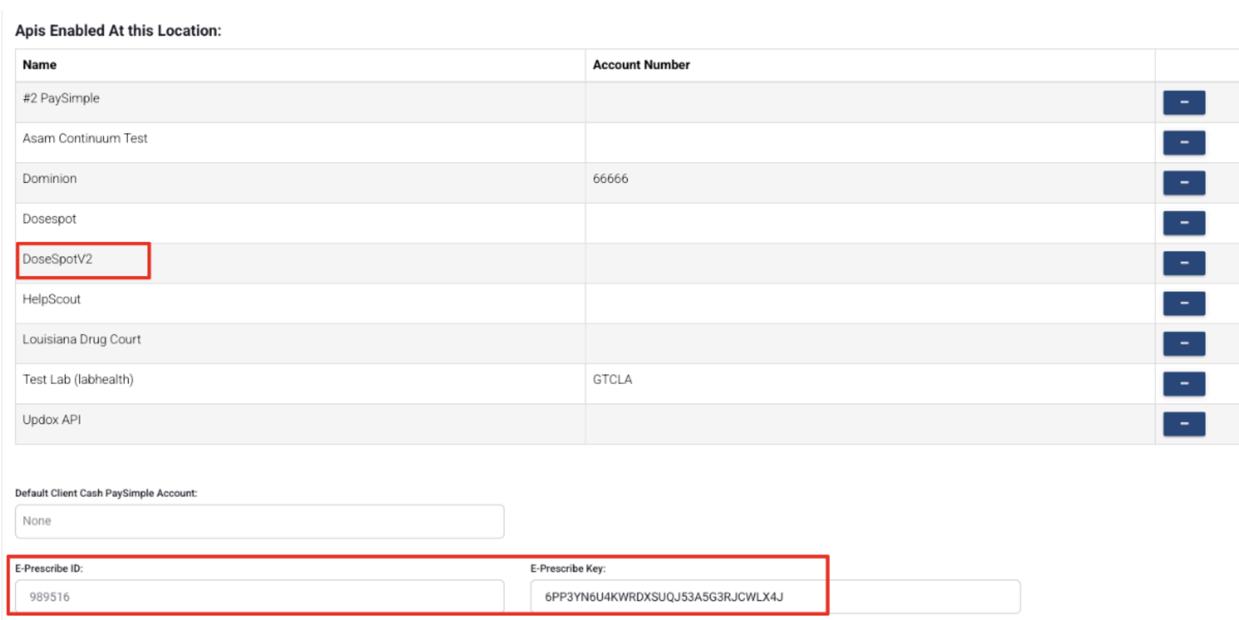
3.2 Location-Specific Configuration

After the global API settings are in place, each physical location that will use the DoseSpot integration must be individually configured.

IMPORTANT: If a customer has multiple DoseSpot locations for different prescribers, the /apivendor setup only requires credentials from one location (as completed in Step 3). However, *each* specific DoseSpot clinic must be set up at the *corresponding LS location level* as described here.

Because the /apivendor settings are global, all DoseSpot clinicians across your organization must be granted access in the DoseSpot portal to the specific clinic location whose credentials you used for this primary API configuration. This ensures their accounts can authenticate through the single global connection.

1. Navigate to System Configuration -> Location.
2. Select the desired location to configure.
3. Go to the **API Integration** section.
4. Add the **DoseSpot V2** API to the location.
5. Enter the **DoseSpot Clinic ID** into the E-Prescribe ID field and the **DoseSpot Clinic Key** into the E-Prescribe Key field.
6. Repeat for each location that is configured as a *separate DoseSpot clinic*.



3.3 User-Specific Configuration and Permissions

The final administrative configuration step involves assigning the appropriate DoseSpot roles and Lightning Step permissions to individual user accounts.

1. Navigate to /useradmin and find the target user.
2. Go to **Individual User Privileges**.
3. Check the appropriate box:
    a. **User is a Physician or Prescriber**, or
    b. **User is a Prescribing Agent**, or
    c. **User is a Proxy**
4. Enter the user's unique **DoseSpot Clinician ID** (obtained from the DoseSpot portal) into the **E-Prescriber ID** field.
5. If your customer has multiple DoseSpot Clinics:
    a. Identify which DoseSpot Clinic was used to configure the apivendor
    b. Be sure to add the corresponding LS location to the user's locations
6. Repeat these steps for all Physicians, Prescribers, Prescribing Agents, and Proxies

IMPORTANT REMINDER: If your customer is using Entities:

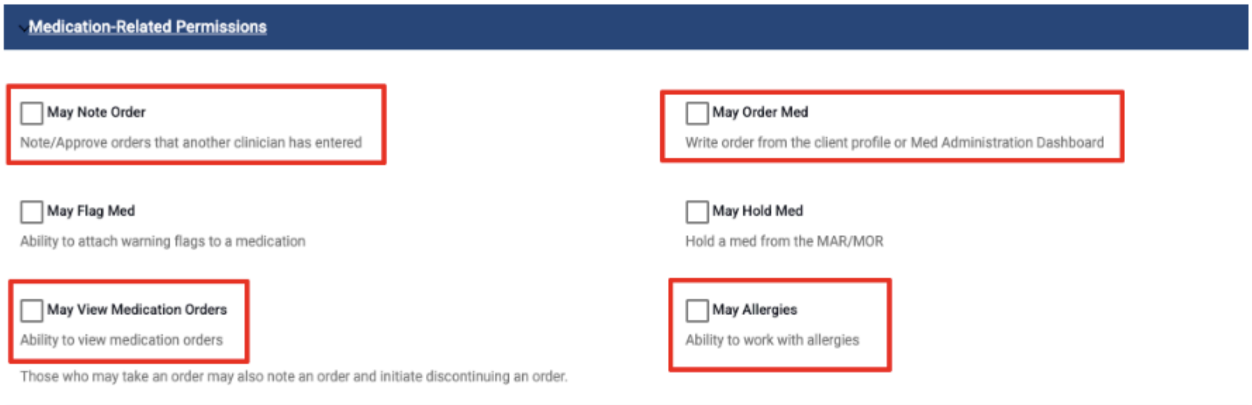
- DoseSpot users need access to *all* DoseSpot clinics within DoseSpot.
- This setup is completed in DoseSpot, not in Lightning Step. This should already have been completed in step 2.3, but is shared again as a reminder because it is critical.

Essential Medication V2 Permissions

Assign the following permissions to user roles as needed to grant access to specific medication management functions. Navigate to System Config > Roles > select the desired user role to edit.

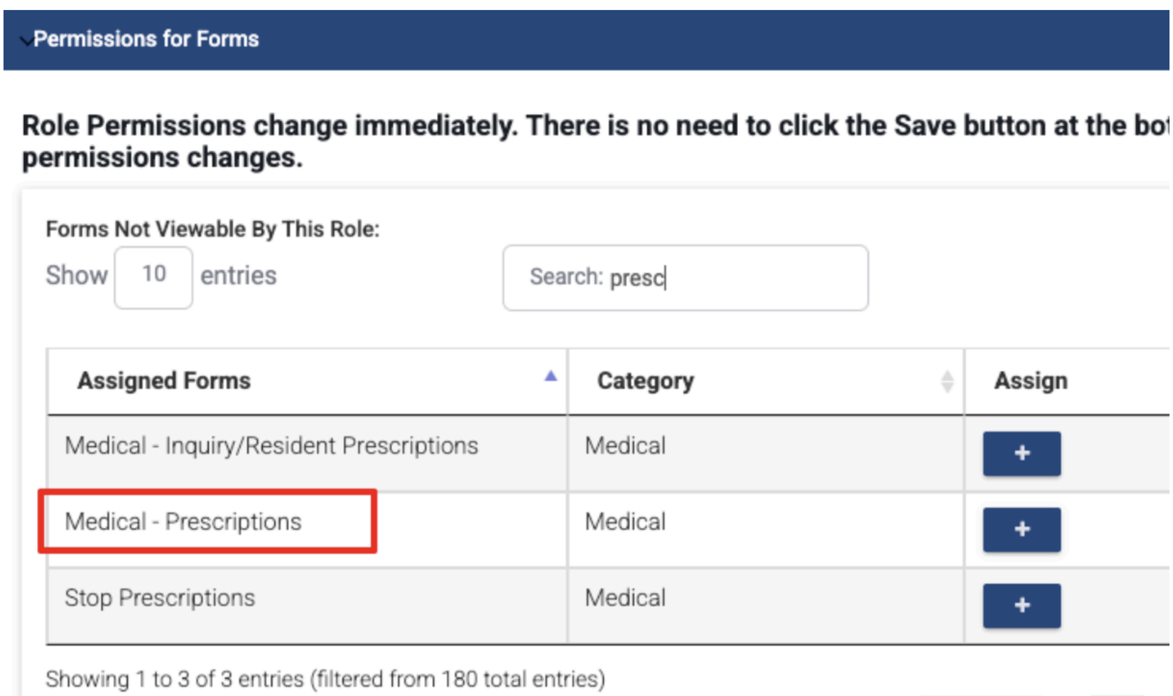
First, go to Medication-Related Permissions:

- **May Order Med**: Grants the ability to create medication orders, non-medication orders, and protocols.
- **May Note Order**: Allows the user to "note" and approve orders entered by another clinician, which is the required approval step to make clinician-entered orders active on the Medication Administration Record (MAR).
- **May View Medication Orders**: Provides read-only access to the "Medication Management" section in a client's profile.
- **May Allergies**: Allows the user to create and manage client allergies.

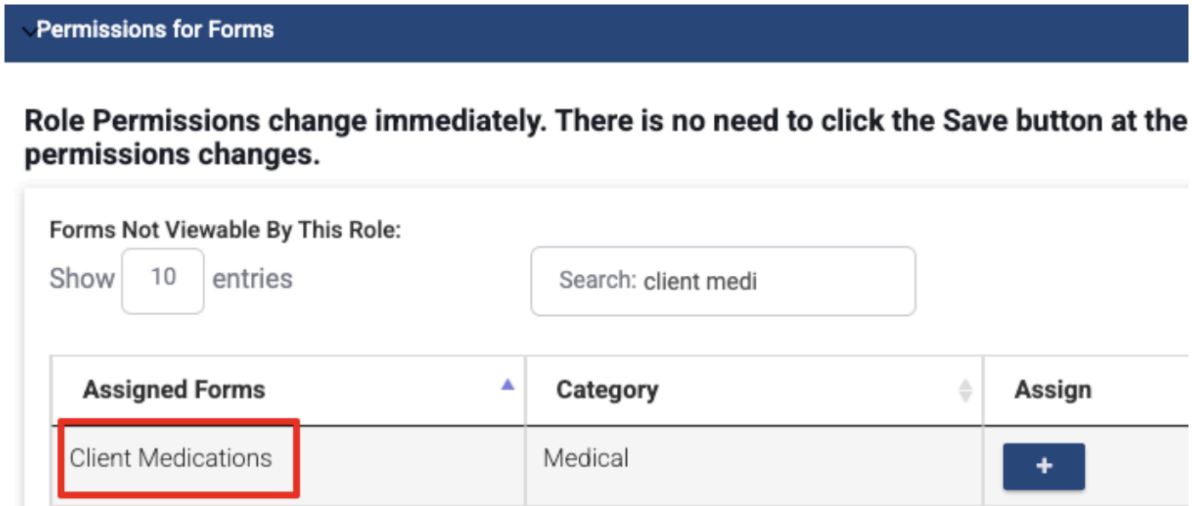


Next, go to Permissions for Forms:

- **Medical - Prescriptions (Form Permission)**: Enables the "Prescription" tab and "Pharmacy" button in the client profile, granting the ability to create new prescriptions. DoseSpot permissions based on clinician, agent, and proxy will still be respected. So if this permission is turned on, but a user is not in DoseSpot, they will receive an error if attempting action.



- **Client Medications (Form Permission)**: Grants the ability to create, view, and edit client-reported medications.



With the administrative setup now complete, the final step involves a one-time action performed by each end-user to secure their account for prescribing.

4.0 Part 3: Final User Setup - Creating a PIN

Once the Lightning Step setup is complete, users must perform a one-time setup of their personal 4-digit PIN. This PIN is a critical security measure required for Prescribing Agents sending non-controlled substances and for Prescribing Clinicians sending any substance, controlled or non-controlled.

End-users should follow these steps to create their PIN:

1. Click on your name in the top-right corner of the Lightning Step interface.
2. Select **Profile**.
3. Navigate to the **Pin** tab.
4. Follow the prompts to **Create Pin**, **Update Pin**, or **Reset Pin** as needed.

The configuration and setup process is now complete. Your users are ready to utilize the DoseSpot medication management and e-prescribing features within Lightning Step.

Appendix A: System Configuration Reference

API URLs

- **Staging Base URL:** https://my.staging.dosespot.com/webapi/v2
- **Staging Callback URL:** https://my.staging.dosespot.com/LoginSingleSignOn.aspx
- **Production Base URL:** https://my.dosespot.com/webapi/v2

- **Production Callback URL:** https://my.dosespot.com/LoginSingleSignOn.aspx

Client Secrets

- **Staging:** 1fae9c3ef0517c6c482223d245505f746bc956032f2b9fed27f3905e4efcd69b
- **Production:** 1919bdc7acf1ccef442a6e2a127078961bfed386c892990cc254ab94b19b9611

Appendix B: Additional LS Confg Options

- Enable V2 Medication Management
Title
Enable Medication V2 feature (medication_v2_feature)
- "Read Back" Checkbox
  - This requires readback verification for users who create orders *for* ordering providers. Is not required for users who *are* ordering providers.
Title
Require Read Back Verification on Verbal Med Orders (medorders_isreadback)
- Allow users to Note orders in bulk
Allows Users to Bulk Note Med Orders (bulknote_medorders)
- Stored Meds Dashboard vs Centrally Stored
Shows the standard medication storage component instead of Centrally Stored (medication_storage)

Appendix C: Troubleshooting Common Configuration Errors

This section details common errors encountered during or after configuration and provides clear, actionable solutions.

Problem: "DoseSpot Create Patient Error: Missing demographics" This error blocks access to Medication Management and occurs because DoseSpot cannot create a patient record without complete demographic information.

Solution: The error banner will specify the missing field (e.g., email, address, DOB). Update the patient's demographics in their profile to resolve the issue. The following fields are required by DoseSpot: First Name, Last Name, Mobile Number, Email, DOB, Address, Zip Code, and Weight/Height (if the patient is under 19).

Problem: "Failed to get JWT token from DoseSpot" / "Login Failed: Unknown user" This error typically indicates that the user attempting to access medication features for a client does not have access to that client's admitted location.

Solution: First, verify the client's admitted location. Then, confirm the user has been granted access to that specific location in **both their Lightning Step user profile and their DoseSpot clinician profile**.

Problem: "Dispensable Drug ID is not an integer" This error occurs when a user attempts to convert a free-texted medication order or a free-texted reported medication directly into a prescription. DoseSpot does not allow prescriptions to be created from free-text entries.

Solution: The user must create the prescription from scratch using the drug database search. The best practice is to always select medications from the database when creating orders or reported meds that may later become prescriptions. This avoids the error and enables critical contraindication checks.

Appendix D: IDP Process for New Meds Module

As of 12/16/26, we are still following the "old" process of completing IDP via the iFrame in Lightning Step. You may see the new option showing as "available" in Lightning Step, but it is not yet operational. Current target is to have the new process ready in January 2026.