Medication Plan QRG

The Medication Plan (Med Plan) in NextStep Solutions is a type of Note used for documenting on medications prescribed for a client and can also be used to document client observations, similar to a Mental Status Exam (MSE). Med Plans are used in both Outpatient Agencies and Residential Care settings.

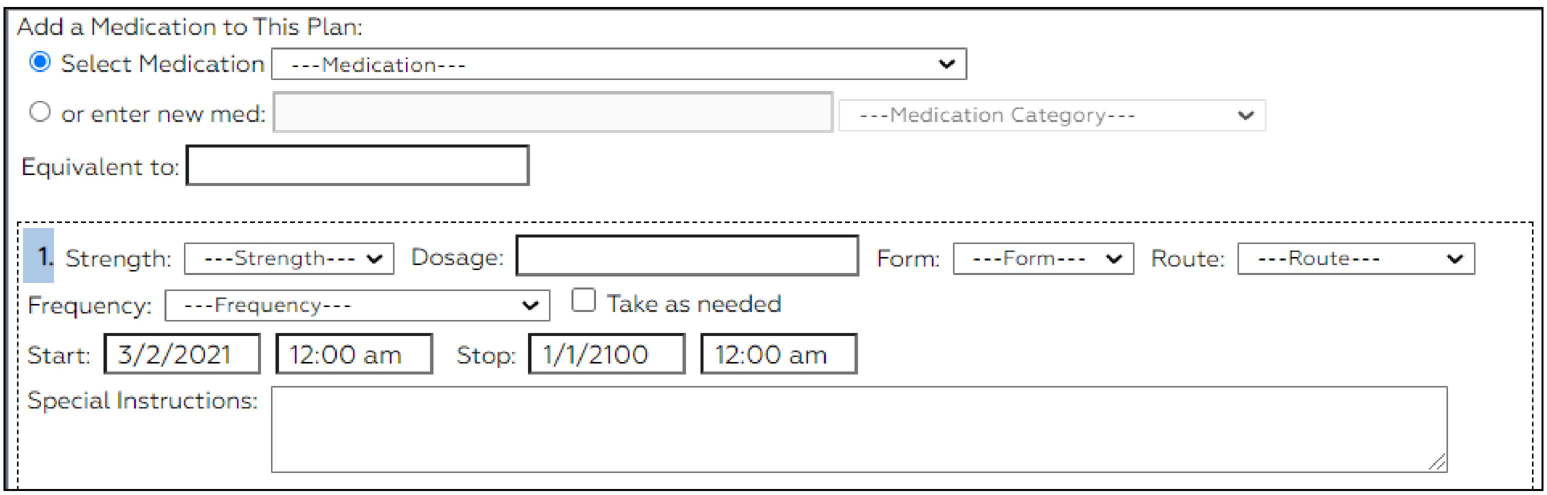
Access and Document in the Med Plan

After prescribing a client medication in DrFirst, you will want to document the prescribed medications in the Med Plan. It is important to note that the Med Plan Note type is configurable, and your Agency may or may not see some of the options listed in the steps below.

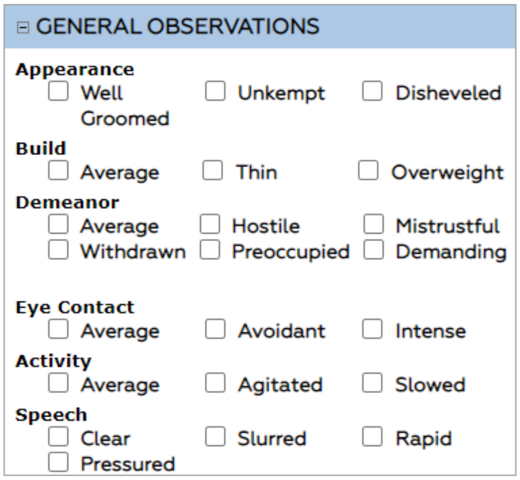
1. Navigate to Medication Management: **Main Menu > Treatment Planning Menu > Medication Management.**
2. Search for and select the client if not already displayed.
3. Click the **Medication Plan** button.
4. Upon entering the Med Plan, a message is displayed "Would you like to sync this client's meds from ePrescribe into NextStep?" Click the **Yes** button to pull in the information entered into DrFirst.
   Note: If you already opened the Med Plan for the client prior to prescribing in DrFirst, click the **Update (Draft)** button and then click the **Sync Meds** button.
5. In the **Diagnosis (DSM-5)** section:
   a. Review or add diagnosis information. To enter a new diagnosis, type into the search bar and click the **Search** button or click the **List All** button to list all available diagnoses options and select one from the list.
   b. The **Effective Diagnosis Date** is defaulted to today's date, change if necessary.
   c. Click the **Diagnosis Type** drop-down and select the diagnosis type.
   d. Select **Diagnosis specifiers** from the list if applicable or click the **Add Custom Specifier** button.
      Note: If adding a custom specifier an Information window is displayed, "Please note that anything entered here may not be officially sanctioned by the DSM-5. Please use responsibly." Click **Yes** to continue and enter the specifier.
   e. Click the **Add Diagnosis** button.
6. In the **Persistent Notes** section:
   a. Enter your clinical opinion in the **Subjective and Objective Data** field to justify the prescription written for the client.
      Note: Click **Fill with last** to bring in previous text that was entered in this field for the client.
   b. Enter the **Assessment and Plan** for the client.
7. The **Date of Service** field defaults to today's date. Type into the field if the date needs to be changed or click into the field and select from the calendar.

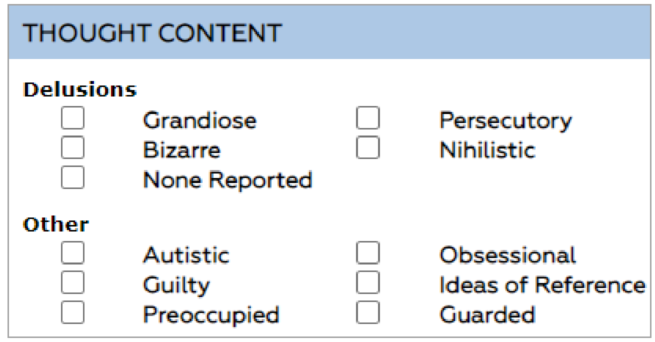
8. In the **Medications** section, the following information is displayed for the client which is synced from DrFirst:
    - **Prescribed Medications**: A list of prescribed medications by your Agency as well as any other active medications they are taking that are not PRN. Click **Show Discontinued Medications** to view discontinued prescribed meds.
    - **PRN:** This section is collapsed by default. Click the drop-down arrow in the **PRN** header to display any prescribed/or active as-needed medications.

Note: If your Agency is not utilizing DrFirst/ePrescribing, you will be required to manually enter prescriptions into NextStep directly, as shown here:



9. In the **Allergies** section, review the client's allergies as entered into DrFirst.
10. In the **Side Effects** section, select the checkbox(es) that apply.
11. In the **Vitals** section, complete the fields as necessary.
12. The **Vitals History** section displays previously recorded vitals. Click on a specific **Vital** column header to view a line graph of that vital over time.
13. Complete the various evaluative criteria statements and checkboxes to document a complete evaluation, including components of a Mental Status Exam (MSE). Examples:





14. If your Agency is set up for Meaningful Use, complete the questions in the **Meaningful Use - ONC section**.
15. Complete the fields in the **Billing Data Box** as you normally would.
16. *(Optional)* Search pre-existing Notes via the **Search Notes** section using any of the filters described below.
    - From the **Service Provider** drop-down, search by Any User or select a specific user.
    - Populate the **Service Date on or after** and the **Service Date on or before** fields with a date range of pre-existing Notes to search.
    - From the **Chart Type** drop-down, select a specific Chart Type if you don't want to search by All Notes & Case Manager Summary.
    - From the **Case Selection** drop-down, select a specific Case if you don't want to search by All Cases.
    - Select the **Show Billing Info** checkbox if you'd like billing details displayed for past Notes.
    - Select the **Show Progress Indicators** checkbox if you'd like the progress indicators displayed for past Notes.
    - Select the **Show Dynamic Fields** checkbox if you'd like dynamic fields displayed for past Notes.
    - Select the **Show Note Updates** checkbox if you'd like to see a history of when past Notes were updated and by who.
    - Enter text into the **Keyword Search** field to search Note text.
    - Click the **Show Notes** button.
17. Click the **Update (Final)** button to sign/seal the Note.

    Note: You can click the **Update (Draft)** button which allows you to save your note as a draft and come back to it later.