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Dispensing Module Overview

The Dispensing Module primarily focuses on distribution and administration of controlled medications in treatment of addiction and use disorders. As a result, Agencies leveraging this module will have a greater need for documentation and audit trail functionality, since administration of the substances the Dispensing Module manages comes under greater scrutiny from the DEA.

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Access the Dispensing Module

The Dispensing Module is a separate application but is still connected to NextStep Clinical. **Note:** A clinical NSS user account is required.

Log Into the Dispensing Module

1. From your Desktop, navigate to the **Dispensing Module** shortcut and double-click it.
Note: NextStep installs the Dispensing Module to a central location and your IT staff will need to create shortcuts on user devices.
2. Log into Dispensing using your NextStep Clinical Username and Password. The main Dispensing Module screen is displayed upon login, while your Waiting List is only displayed if it is turned on.
3. The location you dispense from will be fixed based on where you are accessing the Dispensing Module from. While changing location from within the module is possible, it is not recommended.

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Administer Client Doses

Administer Client Doses

1. Identify if the client has an active dose order. If yes, proceed to Step 6. If not, proceed to the **Dose Order** tab.

2. Click **New Order**, which opens the **New Dose Order** window.
3. Enter the appropriate information pertaining to the order (start, stop, verbal order origin, take home schedule, etc.)
 - If the client has a taper/titration or detox schedule, click **Detox/Increment Schedule** and complete:
 - **Incremental Order** - Order of detoxes
 - **Dosage Breakpoint** - Stopping point of the detox
 - **Increment Amount** - Dosage change per increment on day
 - **Increment on Day** - Days until amount change

Note: Multiple breakpoints can be added to a single detox schedule.
4. Click **Test Medication Schedule** and review dosage schedule for exceptions (Ex: Holidays).
5. Click **Submit Request** to create a pending order or **Post Order Now** if you have Post Order permission.
 - If the order is posted, you will be able to dose immediately.

| Incremental Order | Dosage Breakpoint | Increment Amount | Increment on Day |
|-------------------|-------------------|------------------|------------------|
| 1 | 80 | 2 | 2 |

| Date | Medication | Type | Quantity |
|-----------|------------------|--------------------|----------|
| 4/1/2021 | Methadone Liquid | In Clinic | 100mg |
| 4/2/2021 | Methadone Liquid | In Clinic | 100mg |
| 4/3/2021 | Methadone Liquid | In Clinic | 98mg |
| 4/4/2021 | Methadone Liquid | Take Home - Closed | 96mg |
| 4/5/2021 | Methadone Liquid | In Clinic | 96mg |
| 4/6/2021 | Methadone Liquid | In Clinic | 96mg |
| 4/7/2021 | Methadone Liquid | In Clinic | 94mg |
| 4/8/2021 | Methadone Liquid | In Clinic | 94mg |
| 4/9/2021 | Methadone Liquid | In Clinic | 92mg |
| 4/10/2021 | Methadone Liquid | In Clinic | 92mg |
| 4/11/2021 | Methadone Liquid | Take Home - Closed | 90mg |
| 4/12/2021 | Methadone Liquid | In Clinic | 90mg |
| 4/13/2021 | Methadone Liquid | In Clinic | 88mg |
| 4/14/2021 | Methadone Liquid | In Clinic | 88mg |
| 4/15/2021 | Methadone Liquid | In Clinic | 86mg |
| 4/16/2021 | Methadone Liquid | In Clinic | 86mg |
| 4/17/2021 | Methadone Liquid | In Clinic | 84mg |
| 4/18/2021 | Methadone Liquid | Take Home - Closed | 84mg |

6. Navigate to the **Dose** tab, where you will see the dose(s) listed for today (including takehomes).
7. Click the order you wish to provide and **Resolve** or **Postpone** any associated alerts on the **Alerts** tab.
8. Return to the **Dose** tab, where you can select either of the following options for the dose:
 - **Blind Dose** - The amount of dose provided will be hidden from the label in support of detox
 - **Extended Takehome Override** - Allows up to 2 months takehome dosage.
9. Highlight the first dose listed and select from the following options:
 - **Deny** - If the client is not fit to receive the dose in question (i.e. - Intoxicated, belligerent, etc.)
 - **Dose** - Provide the dose to the client
 - **Finished** - Deselects the client, returns to the **Patient Demographics** window
10. Return to either your **Waiting List** or navigate to the **Search** function in the main window.

The screenshot shows the 'Dose' tab in the software interface. At the top right, a red circle with the number '6' highlights the 'Dose' tab. Below the navigation tabs, there are checkboxes for 'Blind Dose' (checked) and 'Extended Take Home Override'. A red circle with the number '8' highlights the 'Previous Doses:' section. This section contains a table with the following data:

| Med Name | Take On Date | Dispensed By | TimeStamp | Dose Type | Dispensed Amount |
|------------------|--------------|--------------------|-------------------|----------------------|------------------|
| Methadone Liquid | 4/2/2021 | NextStep Solutions | 4/2/2021 10:14 AM | In-Clinic (NextStep) | 100.00 |

Below this table is a 'View Patient's Doses' button. The 'Doses for Today: 1' section contains another table:

| Med Name | Take On Date | Type | Strength | Quantity | Med Dosage | Dosed |
|------------------|--------------|-----------|----------|----------|------------|-------------------------------------|
| Methadone Liquid | 4/2/2021 | In-Clinic | 1 | 100 | 100 | <input checked="" type="checkbox"/> |

A red circle with the number '9' highlights the 'Dosed' column in this table. At the bottom of the interface are three buttons: 'Deny', 'Dose', and 'Finished'.

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Dose/Error Correction

From time to time, errors and accidents can happen. Whether it be spilling a dose, the pump failing to pour the dose, or a cup wasn't placed under the pump, these incidents need to be both documented as either a spill or a void.

Dose/Error Correction

- From the main screen, click **View Patient's Doses** to review the client's dose schedule.
 - The initial screen provides all doses given on the **Dosed On** date. **More Details** option provides more.
- Select the dose in question and click **Report Incident**.
- Select the type of incident from the **Incident Type** dropdown, and add any details to the **Incident Description**.
- Populate additional fields as appropriate/required by your site.
 - Required fields will be identified by a red X icon.
- Click one of the following:
 - Save** - Save your work to come back and complete at a later time.
 - Seal** - Finalizes documentation of the incident and closes the record.
 - Print** - Prints the incident documentation. A dialogue will provide this option on clicking **Seal**.

- If the incident type was a spill, the dose will still be listed in blue. If it was a void or deletion, the dose record will no longer appear. This, and other dosage incidents, can be reviewed on the **Incidents** tab.

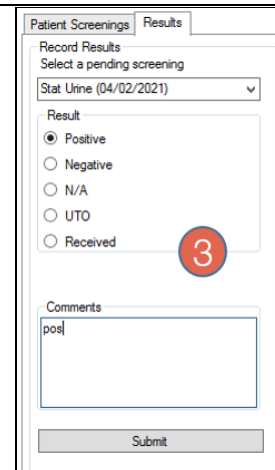
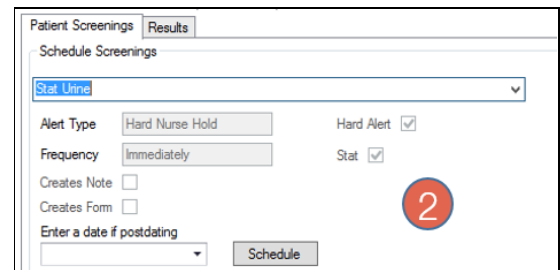
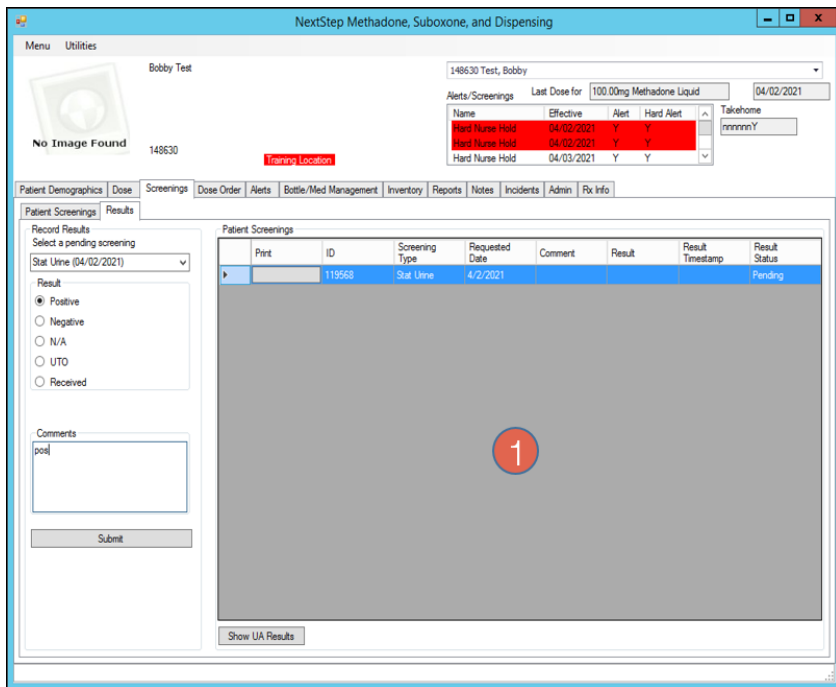
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Screenings and Alerts

Prior to providing doses to clients, a provider may deem it necessary for the client to receive a **Screening** for potential substance abuse during the course of their treatment. Additionally, **Alerts** can be added to create awareness across your staff of potential issues you may encounter with a specific client.

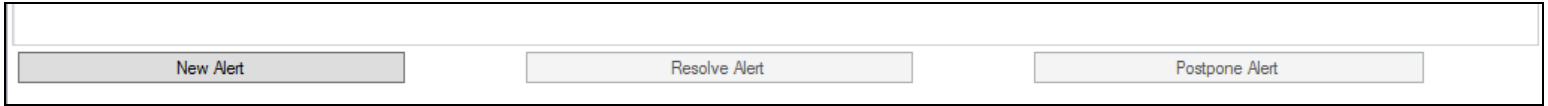
Set Up Client Screenings

- Identify the client you wish to schedule screenings for via the search function. Navigate to the **Screenings** tab.
- From the Screenings tab, select the screening you wish to schedule via the **Schedule Screening** drop-down.
 - Select non-STAT screenings to schedule future screenings. Nurses will navigate daily to the **Admin** tab and click **Generate Screenings for Day** to randomize daily screens.
 - Select STAT screenings to perform and enter results immediately in the **Results** tab.
- With the results entered on the **Results** tab, click **Submit**.
 - If the screen has gone to and returned from a lab, double click the screening ID, enter the results as appropriate, and click **Submit**.
- If a label for the screen fails to print, click the bar under the **Print** column.



Manage Client Alerts

1. Identify the client you wish to assign an **Alert** to via the search function.
2. From the **Alerts** tab, select from one of the following:
 - **New Alert** - Create a new alert for the selected client.
 - **Resolve Alert** - Remove an alert from the client.
 - **Postpone Alert** - Bypass the alert for the next 24 hours.



Add a New Client Alert

1. Click **New Alert**, which will take you to the New Alert window.
2. Select the **Alert Type** from the dropdown list. The type you choose will vary by user setup.
3. Enter the **Alert Date**, which will default to today's date.
4. The **Reported By** field cannot be edited.
5. Populate the **Reason** field, as appropriate. (Required field)

Resolve and Postpone Alerts

1. Click either **Resolve** or **Postpone Alert**, which will take you to the Resolve Alert window.
2. Complete the listed fields, as appropriate.
 - **Postpone Alert** will resolve the alert for 24 hours and create a new alert with the next day's date.
 - **Resolve Alert** will resolve the alert and remove it completely.

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Bottle Management

Bottle Management provides the ability to open or close bottles of medications for clients, as well as transfer contents between bottles. It also provides the ability to retire empty bottles, as well as calibrate your pump.

Open/Close Bottles

1. Navigate to the **Bottle/Med Management** tab.
2. To open a new bottle, under the Open New Bottle/Medication section, select the medication type from the **Medication** drop-down and the bottle via **Select Bottle**. Click **Open**.

The screenshot displays three distinct sections for managing bottles and medication:

- Open New Bottle/Medication:** Features a 'Medication' dropdown menu set to 'Methadone Liquid' and a 'Select Bottle:' dropdown menu set to 'DEMO001-10'. An 'Open' button is located to the right of the 'Select Bottle:' dropdown.
- Open Partial Bottle/Medication:** Features a 'Medication' dropdown menu set to 'Methadone Liquid' and a 'Select Bottle/Container:' dropdown menu set to 'DEMO001-2'. An 'Open' button is located to the right of the 'Select Bottle/Container:' dropdown.
- Close Bottle/Medication:** Features a 'Medication' dropdown menu set to 'Methadone Liquid' and a 'Select Bottle/Container:' dropdown menu set to 'DEMO001-1'. A 'Close' button is located to the right of the 'Select Bottle/Container:' dropdown.

3. To open a partial or previously used bottle, under the Open Partial Bottle/Medication section, select the medication type from the **Medication** drop-down and bottle via **Select Bottle**. Click **Open**.
4. To close a bottle, under the **Close Bottle/Medication**, select the medication type from the **Medication** drop-down and the bottle via **Select Bottle**. Click **Close**.

Note: Each machine can only have one bottle open at a time.

Transfer Bottles

If a bottle measures below threshold, it will not allow you to administer a dose, and you will need to transfer the contents from that bottle into another open bottle.

1. Navigate to the **Inventory** tab to reconcile the source bottle's **Current Volume** with the computer's measurement. Click **Adjust Volume**.
2. Navigate back to the **Bottle/Med Management** tab and ensure the bottle you're transferring is **Closed**.
3. Select the bottle in the **Transfer From** drop-down menu.
4. Select the bottle the contents will be transferred into in the **Transfer To** drop-down.

| Transfer Contents | | Amount Remaining |
|---|-----------|---|
| Transfer From: | DEMO001-1 | 560 mg |
| Transfer To: | DEMO001-2 | 9200 mg |
| Amount transferred from old container to new: | 560 | <input type="button" value="Transfer"/> |

5. Specify the amount being transferred in the **Amount transferred from...** field.
6. Click **Transfer** to complete.

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Inventory Management

While managing bottles in the Dispensing Module is important, you must first account for the bottles in the system via the **Inventory Management** feature. From here, you will be able to add new shipments into the module, record serial/lot numbers, and document inventory notes. It may also be necessary to reconcile your medication inventory if there is less medication present than what is listed in the system or if you've made an incorrect entry into the inventory (e.g. 1000 units instead of 10,000 units).

Add Medication to the Inventory

1. Navigate to the **Inventory** tab.
2. Select the type of medication from the **Add Medication** drop-down menu.
3. Enter the **Serial/Lot** identification number.
4. Enter the **Units Per Bottle** based on the medication added.
5. Add an **Inventory Note**.
6. If only adding one bottle, click **Add One Bottle/Pkg**. If adding more than one bottle, enter the number of bottles being added and click **Add Multiple Bottles/Pkgs**.

Note: Typically, substances like Methadone will be added in as multiple, whereas pill-based substances are typically added one at a time.

7. A pop up will appear confirming the new addition. Click **Ok** to proceed.

The screenshot shows a web form titled "Add Medication". It contains the following elements:

- A dropdown menu for "Add Medication" with "Methadone Liquid" selected.
- A text input field for "Serial/Lot" containing "ABC12345".
- A text input field for "Units Per Bottle" containing "10000".
- A text area for "Inventory Note" containing "Shipment received containing 100 bottles of Methadone." with up and down arrow controls on the right.
- A text input field for "Number of bottles" containing "100".
- Two buttons: "Add One Bottle/Pkg" and "Add Multiple Bottles/Pkgs".

Reconcile Medication Inventory: Dispensing Bottles

1. Navigate to the **Inventory** tab.
2. Under Reconcile Medication, select a **Bottle** from the drop-down menu. The volume listed in the system is displayed.
Note: For a bottle to show in the drop-down, it must have been opened first in Bottle/Med Management.
3. Enter the **Current Volume** that you want to adjust to.
4. Select a **Reason** from the drop-down menu for the adjustment.
5. *(Optional)* Enter a **Reason Note**.
6. Click the **Adjust Volume** button.

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Run Reports

The **Reports Tab** provides the ability to run reports on things like medication usage, bottle inventory, and dispensary attendance.

Run Reports

1. Navigate to the **Reports** tab.
2. Identify the report you wish to run, then click **Generate**.
Note: Some reports will require you to enter a **Start Date** and **End Date** prior to processing.
3. The report window opens, from which you can modify parameters of the report, such as Location, Date, or Client.
4. Click **Submit** to run the report.

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