Dispensing Module: Permissions and Dispensing Settings QRG

Administrator access is required to grant permission to the Dispensing Module options located in NextStep Clinical and permissions that impact users that are working directly within the Dispensing Module. Much of the Dispensing setup is handled in NextStep Clinical.

Dispensing Permissions

Assign Permissions For Dispensing Features Accessed in NextStep Clinical

The permissions below allow a user to access Dispensing functionality within the NextStep Clinical site.

1. Navigate to Maintain Users: **NextStep Clinical > Navigation Menu > Maintain Users**.
2. Click the **User** drop-down and select the user you want to edit.
3. In the **Dispensing Module** section, select the permission(s) you want to enable for the user in the Clinical site:
   - **Alert Management**: Allows users to access and modify Alert Management for a client.
   - **Dose History**: Allows users to review the current dose order and the history of what's been dosed in the past 30 days for a client.
   - **Dispensing Settings**: Allows users to change alert types, frequencies, and screenings. This is typically a permission assigned to Administrators.
   - **Incident Reporting**: Allows users to enter an incident report tied to the Dispensing Module.
4. Click the **Update User** button.

Assign Dispensing Module Permissions from NextStep Clinical

The following permissions apply to users working in the Dispensing Module and are enabled within Maintain Users in NextStep Clinical.

1. Navigate to Maintain Users: **NextStep Clinical > Navigation Menu > Maintain Users**.
2. Click the **User** drop-down and select the user you want to edit.
3. In the **Dispensing Module Permissions** section, select the permission(s) you want to enable for the user in the Dispensing Module:
   - **Post Orders:** Allows users to post orders.

- **Can Acknowledge Orders:** Allows users to acknowledge orders. This is typically enabled for Providers.
- **Can Add/Edit UDS:** Allows users to add/edit UDS (screenings).
- **Can Delete Clinical UDS Results:** Allows users to delete Clinical UDS results under the Screenings tab.

4. Click the **Update User** button.

Assign Dispensing Clinical Alert Permissions from NextStep Clinical

Within Dispensing Settings in NextStep Clinical, you can grant users specific Alert permissions based on each Alert Type. These permissions are applicable to handling Alerts in both the NextStep Clinical site as well as the Dispensing Module.

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.
2. Click the **Clinical Alert Permissions** option to expand it**.**
3. Click the **Alert Type** drop-down and select a type of alert.
4. Click the **Alert Permission** drop-down and select the permission you want to assign to users:
   - **AddAlert:** Allows users to add the selected Alert Type.
   - **EditAlert:** Allows users to edit the selected Alert Type.
   - **OverrideAlert:** Allows users to override the selected Alert Type.
   - **PostponeAlert:** Allows users to postpone the selected Alert Type.
   - **RemoveAlert:** Allows users to remove the selected Alert Type.
5. In the Available section, select the checkbox(es) of the user(s) you want to give the selected Alert permission to.
6. Click the **Add** button to grant permission to the selected users.
   Note: To remove an Alert Permission, in the Has Permission section, select the checkbox(es) for the user(s) and click the **Remove** button.
7. Click the **Save** button.

Assign Permissions from the Dispensing Module

Within the Dispensing Module itself, there are permissions an Administrator can assign to users who are working directly in the Dispensing Module.

1. Navigate to Manage Users: **NextStep Dispensing Module > Menu > Manage Users.**
2. Click the **Select User** drop-down and select a user.

3. In the Grant Access column, use the scroll bar to scroll through the list and click the **Allow** button to grant access to Dispensing Module user permissions. **Note:** Click the **Disallow** button to remove a permission.

    - **Patient Demographics:** Allows users to access the Patient Demographics tab.
    - **Patient Dose:** Allows users to access the Dose tab.
    - **Payment Information**: Not relevant.
    - **Dosing Information**: Legacy permission; no longer in use.
    - **Inventory**: Allows users to access the Inventory tab.
    - **Reports**: Allows users to access the Reports tab.
    - **Add Patient**: Not relevant. A client must be added to the NextStep Clinical site and admitted to a Dispensing Program to be displayed in the Dispensing Module.
    - **Manage Users**: Allows users access to manage user permissions.
    - **Bottle Management**: Allows users access to the Bottle/Med Management tab.
    - **Admin**: Allows users access to the Admin tab.
    - **Notes:** Allows users access to the Notes tab.
    - **Undo Dosage**: Allows users to report a spill or a void.
    - **Dose Orders**: Allows users access to the Dose Order tab.
    - **Edit Dosage**: Allows users the ability to edit a dosage.
    - **Edit All Pending Orders**: Allows users the ability to edit a pending order.

Dispensing Settings: Manage Frequencies

Frequencies (the rate at which a Screening occurs) can be managed by your Administrator. Frequencies are tied to Screenings along with Alerts.

Add a New Frequency

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.
2. Click the **Frequency** option to expand it.
3. Click the **New** button and complete the following fields:
    - **Short Description**: Enter a short descriptive name for the Frequency; can be abbreviated. Example: Week (or WK).

- **Frequency Type Name**: Double-click into the field and enter the name of the Frequency. Examples: daily, weekly, bi-weekly, etc.
- **Cycle**: Double-click into the field and use the drop-down to select Day, Week, Month or Year.
- **Period**: Double-click into the field and enter a number or use the up and down arrows.

  Example: To enter a bi-weekly Frequency, select Week for the Cycle and enter 2 for the Period.

  Note: For weekly Screenings (Monday-Sunday), you must select Week from the Cycle drop-down. If you use the Cycle of Day and a Period of 7, the system considers the day you create the Screening schedule as the start of the week.

4. Click the **Save Changes** button.

Edit a Frequency

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.
2. Click the **Frequency** option to expand it.
3. Double-click into a field and make changes as necessary.
4. Click the **Save Changes** button.

Delete a Frequency

Frequencies currently in use cannot be deleted.

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.
2. Click the **Frequency** option to expand it.
3. Click the **Delete** button ❌.
4. Click the **Save Changes** button.

[Back to Top](#)

Dispensing Settings: Manage Alerts

Alerts are added to create awareness for your staff about a specific client or to create holds during random Screenings. Clinical Alert Permissions discussed in [Dispensing Permissions](#) gives you the ability to designate who has permission to add, edit, override or remove the Alerts set up by your Agency.

Add an Alert

1. Navigate to Dispensing Settings: **NextStep Clinical > Dispensing Module Menu > Dispensing Settings**.

2. Click the **Alerts** option to expand it.

3. Click the **New** button and complete the following fields:

   - **Short Description**: Double-click into the field and enter a short descriptive name for the Alert; can be abbreviated. Example: Moderate (or Mod).

   - **Alert Type Name**: Double-click into the field and enter the name of the Alert.

   - **Hard Alert?**: Select this checkbox to designate the Alert as a hard alert. A hard alert prevents a client from being dosed until the Alert is resolved or postponed. To keep this alert as a soft alert, keep the checkbox unchecked. A soft alert is more informational, can be resolved or postponed, and still allows dosing.

   - **Suspension:** Select this checkbox to suspend all active dosing orders.

   - **Prevent Dosing on Weekends?** Applies to hard alerts only; select this checkbox to prevent dosing on weekends. If left unchecked, it allows for dosing of clients over the weekend, even if they have a hard hold. This would be relevant if your clinic has weekend staff with fewer permissions who can't resolve/postpone the Alert Type.

   - **Alert Color**: Double-click into the field and use the drop-down to select a color. This color is displayed for users who will see the alerts.

4. Click the **Save Changes** button.

Edit an Alert

1. Navigate to Dispensing Settings: **NextStep Clinical > Dispensing Module Menu > Dispensing Settings.**

2. Click the **Alerts** option to expand it.

3. Double-click into a field or select/unselect a checkbox and make changes as necessary.

4. Click the **Save Changes** button.

Delete an Alert

Alerts currently in use on Screenings cannot be deleted.

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.

2. Click the **Alerts** option to expand it.

3. Click the **Delete** button ❌ .

4. Click the **Save Changes** button.

Dispensing Settings: Manage Screenings

The types of Screenings your Agency does can be managed within Dispensing Settings in NextStep Clinical. Screenings are made up of Alerts and Frequencies and are either STAT or scheduled. Scheduled Screenings are random in nature unless you do daily Screening for a client. When a Screening type is scheduled, the associated Alert is put onto the client's account.

Add a Screening

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.
2. Click the **Screenings** option to expand it.
3. Click the **New** button and complete the following fields:
   - **Short Description**: Enter a short descriptive name for the Screening; can be abbreviated. Example: Stat UDS (or SUDS).
   - **Screening Type Name**: Double-click into the field and enter the name of the Screening.
   - **Alert Type**: Double-click into the field and use the drop-down to select an Alert to associate with this Screening. This displays a hold on the client's account if they are selected/assigned to this Screening.
   - **Frequency**: Double-click into the field and use the drop-down to select a Frequency to associate with this Screening. This is the rate at which the Screening would occur.
   - **Billing Activity Code**: If your Agency bills for this screening, select an Activity Code from the list. If your Agency is not set up for the billing of screenings, contact NSS Support.
4. Click the **Save Changes** button.

Edit a Screening

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings.**
2. Click the **Screenings** option to expand it.
3. Double-click into a field or click a drop-down to make edits as necessary.
4. Click the **Save Changes** button.

Delete a Screening

1. Navigate to Dispensing Settings: **NextStep Clinical > Main Menu > Dispensing Module Menu > Dispensing Settings**.

2. Click the **Screenings** option to expand it.

3. Click the **Delete** button.

4. Click the **Save Changes** button.

[Back to Top](#)