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Access DrFirst

DrFirst is NextStep Solutions' integrated ePrescribing module. From here, medications are prescribed and applied to a client's Treatment Plan and allergy records are contained for the client.

Access DrFirst

1. Navigate to Medication Plan: **Main Menu > Treatment Planning Menu > Medication Plan.**
2. Search for and select a client.
3. Click the **DrFirst** button.

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Enter and Maintain Client Allergies

A client's allergy record is entered into DrFirst and will need to be synced with your NextStep Clinical site. Upon entering the DrFirst platform, if you've never entered allergies for the client, there will be a red message at the top of the screen that says "No drug allergies have been entered for the patient. Drug allergy details are important for detecting potential adverse reactions prescriptions are written." If, however, you've added Allergies to the client's record before, they are displayed under the Allergies section.

Enter Client Allergies

1. From within DrFirst on the Patient Summary page, if you received the message about no drug allergies are entered for the patient, click the **Please confirm this patient's allergies link**. Or, if allergies were previously entered, navigate to the **Allergies** section.
2. Click the **plus sign** to add an allergen.
Note: If there are no known allergies, select the **Mark patient NKDA** button.
3. In the **Allergen** field, start typing to search for the allergen and select from the list or click the **Search** button and select from there.

4. In the **Reaction(s)** field, start typing to search for a reaction and select from the list or type the reaction and click the **Add Reaction** button.

Note: To remove a reaction, click the **X** next to the reaction.

5. In the **Severity** field, start typing to search for a severity and select from the list or type the severity and click the **Add Severity** button.

6. Enter an **Onset Date**, if known.

7. Click the **Save** button.

NOTE: These allergies will now appear in the NextStep Med Plan, having been synced with DrFirst.

Edit, Inactivate, or Delete an Allergy

1. From within DrFirst, navigate to the **Allergies** section of the Patient Summary.

2. Click the Allergen you want to make changes to and select one of the following buttons:

- **Modify:** Change details for the selected allergy
- **Make Inactive:** Deactivate the allergy, but still retains it in the client record where you can Filter to display active or inactive allergies)
- **Delete:** Remove the allergy from the client record permanently. Can be used if you enter an allergy erroneously.

3. Click the **Update** button.

Mark Allergies as Reviewed

1. From within DrFirst, navigate to the **Allergies** section of the Patient Summary.

2. Click the check mark to mark the client's allergies as reviewed.

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Manage a Client's Pharmacies

From within DrFirst, if a default pharmacy has not been selected for a client, there will be a red message at the top of the window that says, "No pharmacy is selected for this patient. Please set the default pharmacy". If a pharmacy has already been set as default, it will be listed in the Patient section and can be changed from there.

Set a Client's Default Pharmacy

1. If a default Pharmacy has not been selected for a client, click the **Please set the default pharmacy** link.

2. Select one of the following radio buttons:

- **Practice List:** search for a pharmacy in your Agency pharmacy favorites list.
- **Favorites List:** search for a pharmacy in your own personal pharmacy favorites list.

- **All Lists:** search for all pharmacies in the database.
3. (Optional) Select the checkbox(es) of the **Pharmacy Type** to narrow down your search.
 4. (Optional) Select the checkbox(es) for **Pharmacy Options** to narrow down your search.
 5. Enter any combination of **Name, Address, City, State, Zip, Phone, and Fax** to search for the pharmacy.
 6. Click the **Search** button.
 7. Select the pharmacy to add to the client's list.

Add Additional Client Pharmacies

1. Within DrFirst, navigate to the **Patient** section of the Patient Summary, click on the **Search** button.
2. Search for and select a new pharmacy.

Note: After the pharmacy is added to the client's list, it is automatically set as default. To set another pharmacy as default, click the **Pharmacy** drop-down and select the pharmacy from the client's list.

Delete a Client's Pharmacy

1. Within DrFirst, navigate to the **Patient** section of the Patient Summary, click on the **Pharmacy** drop-down and select a pharmacy.
2. Click the **Delete** button.
3. A prompt is displayed, "Are you certain that you wish to remove this pharmacy from the patient's list?" Click the **Confirm Delete** button.

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Manage Medications

If a client is taking a medication not prescribed by your Agency, you can add it within DrFirst under the Medications section of the Patient Summary. Here you can also find any current active medications that were prescribed by your Agency.

Add an Active Medication

1. From within DrFirst, navigate to the **Medications** section of the Patient Summary.
2. Click the **Add Medication** button.


Note: Click the **Show Medication History** button if you want to bring in Medication history for the client. From here, you can make a selection of the medications you want to import into DrFirst as Active Medications.

Surescripts pulls medication history from payer claims and pharmacy fill data. Select the checkbox next to the medication you want to import, and click the **Add Medication** button.


3. Search for the appropriate drug, which will match as you type.
4. Select the correct **dosage**.

5. If there are **Medication Alerts**, they are displayed at this point. Please indicate whether this medication should be prescribed despite the warning. Click the **Continue** button to continue to move forward with the medication entry.
6. In the **Add Medication** window, you can enter any/all appropriate details including **Pharmacy, Pt Directions, Qty**, and associated **Primary Diagnosis**.
Note: No fields are required for Adding Medications.
7. Click the **Add** button. The medication is displayed in the client's **Active Medications** section of their summary.


Review Active Medications

1. From within DrFirst, navigate to the **Medications** section of the Patient Summary.
2. Click the **Mark as Reviewed** button .
3. From the **Medication Status** drop-down, select **Unknown or Incomplete** or **Complete**.
4. Click the **Confirm Review** button.

Renew an Active Medication

1. From within DrFirst, navigate to the **Medications** section of the Patient Summary.
2. Click the **Renew** button  next to the medication you want to renew.
Note: If the medication information is incomplete or invalid, this button will be grayed-out and you can click the **Prescribe** button instead, see [Prescribe from an Active Medication](#) below.
3. The medication is now displayed in the Prescription Management section, where you can change prescription details if necessary and send the prescription.


Stop an Active Medication

1. From within DrFirst, navigate to the **Medications** section of the Patient Summary.
2. Click the **Stop** button  next to the Active Medication you want to stop.
3. In the **Date Stopped** field, type the date or select from the calendar.
4. From the **Common Reasons** drop-down, select the reason for stopping the medication.
5. *(Optional)* Add a note to the **Notes** field.
6. Click the **Stop** button.


View Inactive Medications

1. From within DrFirst, navigate to the **Medications** section of the Patient Summary.
2. Click the **Show Inactive Medications** button. A list of the client's inactive medications is displayed below the button.

Make an Inactive Medication an Active Medication

1. From the **Inactive Medications** list, click the **Restart** button  next to the medication you want to change to an Active Medication. The medication is now displayed under Active Medications.

Delete a Medication

1. From within DrFirst, navigate to the **Medications** section, click the **Delete** button  next to the medication you want to delete.
2. Click the **Confirm Delete** button in the Warning prompt.


Note: Deleting medications should only be used for medications entered in error, otherwise, use the [Stop an Active Medication](#) workflow.


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Create, Modify, and Send Prescriptions


For prescriptions to be successfully sent, the following fields must be captured on the Face Sheet: **First Name, Last Name, DOB, Gender or Birth Sex, and Current Residence**. The client must also be admitted to the Agency to prescribe medications for them. If these fields are not complete, you'll be stopped from accessing DrFirst.

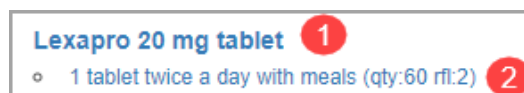
Write a New Prescription

1. From within DrFirst, click the **Create New Prescription** button  located at the top of the window.
2. Search for the appropriate drug, which will match as you type.
Note: A generic form of the drug will be listed in parentheses after the drug name. Select it if you want to prescribe a generic version.
3. Select the **dosage**.
4. **Clinical Alerts** may be displayed. If you want to prescribe, select a justification from the drop-down, and click the **Prescribe Anyway** button to move forward with the prescription.
Note: Click the **Do Not Prescribe this Medication** button to exit.
5. In the Prescribe Medication window, your name defaults in the **Provider** drop-down. If you are prescribing on behalf of a Provider, select their name from the drop-down.
Note: If your Agency has clients who are minors, the height and weight entered into the Vitals widget in NSS is displayed in the Patient Observation section of the Prescribe Medication window.


6. Enter the details of the prescription including **Pharmacy, Patient Directions, Qty,** and associated **Primary Diagnosis**.
Note: If you make a selection from the **Days Supply** drop-down after filling in the Dose, Dose Unit, Route, and Frequency, the Quantity field will auto-populate.
7. Click the **Review** button.
Note: Again, you may receive **Clinical Alerts** based on the information you've entered in this window.
8. In the Review Prescription window, review/ensure the prescription details are correct.
Note: If you are a Residential Agency, the **Internal Use Only: Stop Medication on: mm/dd/yyyy** information will be pulled into NextStep if the checkbox is selected. If you are utilizing eMAR, it will stop this medication from being able to be passed as of the date listed here.
9. (Optional) Click the **favorites** button  to save this medication to your Medication Favorites list.
10. Click one of the following buttons:
 - **Save Pending Rx:** Adds prescription to the Prescription Management section of the Patient Summary Page for review and signoff
 - **Save and Add Rx:** Creates a pending prescription in the Prescription Management section of the Patient Summary Page and takes you back to the Medication search to add another prescription
 - **Back:** Takes you back to the Prescribe Medication window so you can edit the prescription
 - **Cancel:** Cancels the prescription

Write a Prescription Using a Medication Favorite

1. From within DrFirst, click the **Favorites**  drop-down located next to the Create a New Prescription button at the top of the window. Or, after clicking the Create a New Prescription button, click the **Favorites** drop-down.
Note: Use the **Filter Favorites** field to start typing a drug to narrow down your Favorites list.
2. Click on the **medication name (1)** from the Org Favorites, My Favorites, or Recent list to open the Prescribe Medication window, where you can review and edit prescription details or **click the prescription detail information directly under the medication (2)** to add it directly to the Prescription Management window on the Patient Summary page.




Modify a Prescription

1. From Prescription Management on the Patient Summary page or the Prescription Report, click the **Edit** button  next to the prescription you want to modify. The Prescribe Medication window is displayed.

2. Modify the prescription details as necessary.

Prescribe from an Active Medication


1. From within DrFirst, navigate to the **Medications** section, click the **Prescribe** button  next to the prescription you want to prescribe. The Prescribe Medication window is displayed.
2. Edit the details of the prescription if necessary.
3. Follow steps 8-11 in [Write a New Prescription](#) above.

Send or Print a Prescription from a Client's Prescription Management

1. In the client's Prescription Management section, select the checkbox(es) of the prescription(s) you want to take an action on.
2. If you are a Provider, enter your **Signature Password** (signature passphrase).
3. Click one of the following buttons:
 - If you are a Provider:
 - **Send:** Electronically sends the prescription to the pharmacy.
 - **Send & Print:** Electronically sends the prescription to the pharmacy and prints a watermarked copy of the prescription.
 - **Print don't Send:** Prints the prescription but does not send it electronically. This can be used if the client doesn't know which pharmacy they want to use.
 - **Sign don't Send:** Signs the medication and adds it to the active medication list. This does not electronically send a prescription to the pharmacy. This can be used if the client received a sample.
 - If you are a Provider Agent:
 - **Send, Signature to follow:** Electronically sends the prescription to the pharmacy and adds it to the queue to be acknowledged.

Send or Print Prescriptions from Prescription Report (DRFIRST - REPORT)

From within NextStep Clinical, Providers can easily access Prescription Reports where prescriptions for multiple clients can be managed in one place. From here, Providers can send, print, and sign prescriptions. The report can be filtered by Provider, Patient, Drug Type, and Status.

1. Navigate to the Prescription Report: **Navigation Menu (in NextStep) > DRFIRST - Report or within DRFirst click the Prescription Report**  **icon located in the upper right-hand corner.**
2. The Status drop-down is defaulted to **Pending**. Use the Provider, Patient, or Drug Type fields to narrow your search further.

Note: If you wish to view All, Completed, Undeliverable, or Canceled prescriptions, select one of those options from the drop-down.

- All prescriptions are selected. Click a checkbox to deselect a prescription, or click the **Deselect All** button if you don't want to take an action on all prescriptions at once.
- Enter your **Signature Password** (signature passphrase).
- Click one of the following buttons:
 - If you are a Provider:
 - Send:** Electronically sends the prescription to the pharmacy.
 - Send & Print:** Electronically sends the prescription to the pharmacy and prints a watermarked copy of the prescription.
 - Print don't Send:** Prints the prescription but does not send it electronically. This can be used if the client doesn't know which pharmacy they want to use.
 - Sign don't Send:** Signs the medication and adds it to the active medication list. This does not electronically send a prescription to the pharmacy. This can be used if the client received a sample.
 - If you are a Provider Agent:
 - Send, Signature to follow:** Electronically sends the prescription to the pharmacy and adds it to the queue to be acknowledged.

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Pharmacy Messages: Change Requests and Renewal Requests

From within NextStep you can easily navigate to your Pharmacy Messages in DrFirst, where you can handle change requests, cancellations, and renewal requests. Agencies can opt out of this functionality.

Respond to a Change Request

Pharmacies may send Change Requests to ask Providers to approve a generic substitute for a medication prescribed. This may happen if a pharmacy runs out of the brand-name drug prescribed.

- Navigate to Pharmacy Messages: **Navigation Menu (in NextStep) > DRFIRST - Messages** or **within DrFirst**

click the  icon in the upper right-hand corner of the window.


- Select a Provider from the **View Messages For** drop-down.
- From the **Message Type** drop-down, select **Change Request**.
- Expand a request.

5. In the Response section of the Change Request, select an **Action** from the drop-down. The actions list changes depending on the type of prescription the message is associated with. Below are the options defined by DrFirst:

- **Prior Authorization**
 - **Approved by Payer:** Approves the medication prescribed by the provider (*PRIOR AUTHORIZATION CONFIRMATION NUMBER is required).
 - **Denied by payer:** Denies the request and sends a denial message to the pharmacy. You must select a Denial Reason from the drop-down selections.
 - **Forward:** Allows you to forward the request to another Provider in the Agency.
 - **Prior authorization not attempted:** Denies the request and sends a denial message to the pharmacy.
 - **Cancel - deny the change request and cancel the original prescription:** Denies the request and cancels the original prescription.
- **Generic Substitution or Therapeutic Interchange**
 - **Approve selected alternative:** Approves the alternative that was selected based on the pharmacy's suggestion.
 - **Deny - deny the change request and keep original prescription:** Denies the change request and keeps the original prescription.
 - **Forward:** Allows you to forward the request to another Provider in the Agency.
 - **Modify suggested:** Allows you to change the prescription details and/or pharmacy information. When this is selected and the prescription is changed, the prescription becomes a pending prescription in the appropriate Provider's prescription report. This alerts the pharmacy that the requested change has been denied, but a new prescription will follow.
 - **Choose a new drug:** Allows you to choose a different drug to prescribe. When this is selected and the prescription is changed, the prescription becomes a pending prescription in the appropriate Provider's prescription report. This alerts the pharmacy that the requested change has been denied, but a new prescription will follow.
 - **Cancel - deny the change request and cancel the original prescription:** Denies the request and cancels the original prescription.

6. Enter your **Signature Password** and click the **Send** button.

Process a Renewal Request

1. Navigate to Pharmacy Messages: **Navigation Menu (in NextStep) > DRFIRST - Messages** or **within DrFirst** click the  icon in the upper right-hand corner of the window.
2. Select a Provider from the **View Messages For** drop-down.

3. From the **Message Type** drop-down, select **Renewal Request**.
4. Expand a request.
5. In the Response section, you can perform one or both of the following workflows.
 - Select an **Action** from the drop-down as defined by DrFirst:
 - **Deny**: Denies the request and sends a denial message to the pharmacy.
 - **Change**: Allows you to change the prescription and/or pharmacy information. The prescription becomes a pending prescription in the appropriate Provider's Prescription Report when the prescription is changed. This alerts the pharmacy that the requested renewal has been denied, but a new prescription will follow.
 - **Renew plus (X) refills**: Renews the prescription with the desired amount of additional refills. When you choose the appropriate refills, you are authorizing this fill plus X refills of the medication.
 - **Forward**: Allows you to forward the prescription request to another qualified prescriber in the Agency.
 - **Remove**: Should only be used if you have previously handled this request and it is a duplicate.
 - Enter a response into **Response Notes to Pharmacist** text field.
6. Click the **Send** button.

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Notate Medications Prescribed in NextStep/Sync DrFirst Information

While prescribing in DrFirst, Providers will also have the client's Medication Plan open and notate on the medications they've prescribed to the client. To see the information that's been entered for allergies and medications within DrFirst for a client, you will need to sync DrFirst with the Medication Plan in NextStep.

If you are working in the Med Plan simultaneously along with the DrFirst window and you are ready to bring the information into the Med Plan:

1. Click the **Update (Draft)** button to save any work you've started.
2. Click the **Sync Meds** button to bring over the medications and allergies from DrFirst.
3. Complete the Med Plan as you normally would.

If you are *not* working in the Med Plan at the same time as DrFirst:

1. Navigate to the client's Medication Plan: **Treatment Planning > Medication Plan > Medication Plan button**.
2. Upon entering the Med Plan, a window 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.
3. Complete the Med Plan as you normally would.

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