

The logo for NextStep Solutions. The word "NEXTSTEP" is in a bold, dark blue font, with the letter "X" in orange. Below it, the word "SOLUTIONS" is in a bold, orange font, followed by a registered trademark symbol (®).

NEXTSTEP **SOLUTIONS**®

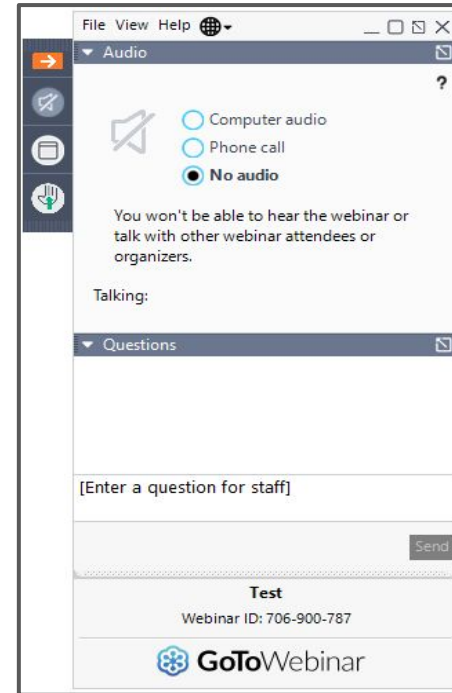
Moving Behavioral Health Forward

Navigating ePrescribing (eRX) Webinar

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Housekeeping

- All attendees will be muted.
- Please enter your questions into the Questions box in the Go To Webinar control panel.



Objectives

- Review Required Facesheet Information
- Access Dr. First
- Add Allergies & Set Preferred Pharmacy
- Add Active Medication History
- Create and Send Prescriptions
- Sync Medications into Med Plan
- Review Dr First Report
- Set up Proxies

ePrescribing using Dr. First

Required Facesheet Fields

Path: Main Menu > Admissions > Facesheet

NEXTSTEP SOLUTIONS
Harper Garrett (hgarrett) @ NS
Residential Recovery Center
Test, Chris ▶

MAIN MENU

REMINDERS 8

MESSAGE CENTER 0

SCHEDULER

CHANGE PASSWORD

MAINTAIN USERS

CHANGE LOCATION

PRINT

HELP CENTER

Admissions →

- Face Sheet**
- Pre-Admit Forms
- Bed Management
- Program Transfer or Client Discharge
- Case Assignments

Reports

- Administrative Reports
- Document Center
- Reports
- Personal Productivity
- Export Form Data
- eMAR Reports

FACE SHEET

Test, Chris +

SEARCH BY BIRTHDATE FORMAT: MM/DD/YY MM/DD/YYYY

LIST ACTIVE CLIENTS ALL CLIENTS

Client:	Test, Chris	Location:	Practicum Outpatient	
Date of Birth:	6/29/1976	Primary Clinician:	Harper Garrett	
Programs:	Program 1:	Intensive Outpatient Therapy	Primary Admission Date:	11/14/2022 12:00:00 AM
	Program 2:		Secondary Admission Date:	
Current Status:	Admitted 11/14/2022 12:00 AM		Case No.:	928-1
Allergies:	Cats	Client Photo:		

Main Menu Edit Add New

Required Facesheet Fields

ADD A NEW CLIENT

CLIENT INFORMATION

First Name: Kiaya

Middle:

Last: Test

Birth Name:

Previous Last Name:

Suffix:

Date of Birth: 07/24/1950

SSN: - -

Race: Select one or more races...

Birth Sex: Female

Gender Identity: Select a Gender Identity...

Orientation: Select a Orientation...

Ethnicity: Select a Ethnicity...

Smoking Status: Select a Smoking Status...

Preferred Pronouns: Select a Preferred Pronouns...

Language: Select a Language...

Religion: Select a Religion...

Location: Practicum Outpatient:: Practicum Outpatient Agency, 123 Main Street , Anywhere, Pennsylvania 17815

Case Assignments

Admit? Yes No Pending

Primary Program:

Secondary Program:

Third Program:

Fourth Program:

Outpatient

Select A Program

Select A Program

Select A Program

Primary Admission Date:

Secondary Admission Date:

Third Admission Date:

Fourth Admission Date:

11/02/2022

Primary Clinician:

Secondary Clinician:

Clinician Supervisor:

Intake Specialist:

NextStep Solutions

None

None

None

Required Facesheet Fields

Current Residence

Address:

132 Home St.

City:

Lakewood

State:

Colorado

Zip Code :

80227

(Home)

(Business)

(Cell)

Phone:

555-547-8214

Adding Diagnosis

Path: Main Menu > Treatment Planning > DSM-5

The screenshot displays the NextStep Solutions web application interface. On the left is a dark blue sidebar menu with the following items: MAIN MENU, REMINDERS (with a red circle containing the number 7), MESSAGE CENTER (with 0), SCHEDULER, CHANGE PASSWORD, MAINTAIN USERS, CHANGE LOCATION, PRINT, and HELP CENTER. The top of the sidebar shows the user's name: Harper Garrett (hgarrett) @ NS Residential Recovery Center, with a profile icon and a right-pointing arrow.

The main content area is light blue and features a breadcrumb trail at the top: Admissions → Clinical Forms → Treatment Planning. Below this, there are three columns of menu items:

- Admissions:** Face Sheet, Pre-Admit Forms, Bed Management, Program Transfer or Client Discharge, Case Assignments.
- Clinical Forms:** Assessment Forms, Scheduled Forms, Unscheduled Forms, Follow-Up Post-Discharge Forms, Weblink Inbox - Attach Forms.
- Treatment Planning:** ITP Builder, Problem List, Medication Plan, Medication History, **DSM-5** (highlighted with an orange border), eMAR, Insig Telehealth.

At the bottom of the main area, there are three more columns of menu items:

- Reports:** Administrative Reports, Document Center, Reports, Personal Productivity, Export Form Data.
- Admin Tools:** Treatment Plan Template and Program Setup, System Setup, System Setup (Supplemental), Form Builder.
- Practice Management:** Billing Reports.

Adding Diagnosis

DSM-5

BEGIN ENTERING LAST NAME AND CLICK ON CLIENT TO SELECT:

Test, Kiaya

SEARCH BY BIRTHDATE FORMAT: MM/DD/YY MM/DD/YYYY

Client:	Test, Kiaya	Location:	NextStep
Primary Clinician:	NextStep Solutions	Date of Birth:	7/24/1950
Programs:	Program 1: Outpatient	Primary Admission Date:	11/2/2022
	Program 2:	Secondary Admission Date:	
Case No.:	1003-1	Admit Date:	11/2/2022
Current Admission Status:	Admitted 11/2/2022	Client Photo:	

-DIAGNOSIS (DSM-V)-

To use the search, you must enter a minimum of three characters to search then click the search button next to the box. You may also click the list all button next to the search button if desired.

Search

List All

Current Diagnoses

Diagnoses highlighted in red are no longer billable and should be updated

Diagnosis	Specifier	Effective Date	Designation	Added By:	Order
F10.220 - Alcohol dependence with intoxication, uncomplicated		11/2/2022	Primary	Provider A, MD	1

DSM-5

Path: Main Menu > Treatment Planning > DSM- 5

-DIAGNOSIS (DSM-V)-

To use the search, you must enter a minimum of three characters to search then click the search button next to the box. You may also click the list all button next to the search button if desired.

dep

F06.31 - Depressive disorder due to another medical condition, With depressive features
F06.32 - Depressive disorder due to another medical condition, With major depressive-like episode
F06.32 - Mood disorder due to known physiological condition with major depressive-like episode
F06.34 - Depressive disorder due to another medical condition, With mixed features
F10.14 - Alcohol-induced depressive disorder, With mild use disorder
F10.21 - Alcohol dependence, in remission
F10.220 - Alcohol dependence with intoxication, uncomplicated
F10.230 - Alcohol dependence with withdrawal, uncomplicated
F10.24 - Alcohol-induced depressive disorder, With moderate or severe use disorder
F10.250 - Alcohol dependence with alcohol-induced psychotic disorder with delusions
F10.251 - Alcohol dependence with alcohol-induced psychotic disorder with hallucinations

Effective Diagnosis Date:
Diagnosis Type: -- Please Select Diagnosis Type --
Diagnosis specifiers: None specified

According to the -Diagnoses (ICD10)-, there are no specifiers for this Diagnosis. If you feel this is in error, please have your administrator contact NextStep Solutions.

Accessing DrFirst

Path: Main Menu > Treatment Planning > Medication Plan > Dr First

The screenshot displays the NextStep Solutions software interface. On the left is a dark blue sidebar with the logo and user information: Harper Garrett (hgarrett) @ NS Residential Recovery Center, City, Edward. Below this are menu categories: MAIN MENU, REMINDERS (7), MESSAGE CENTER (0), SCHEDULER, CHANGE PASSWORD, MAINTAIN USERS, CHANGE LOCATION, PRINT, and HELP CENTER. The main content area is light blue and contains three columns of menu items. The top row has 'Admissions', 'Clinical Forms', and 'Treatment Planning', connected by right-pointing arrows. The 'Treatment Planning' column has 'Medication Plan' highlighted with an orange box. Below this are three columns: 'Reports', 'Admin Tools', and 'Practice Management'. The 'Reports' column includes Administrative Reports, Document Center, Reports, Personal Productivity, and Export Form Data. The 'Admin Tools' column includes Treatment Plan Template and Program Setup, System Setup, System Setup (Supplemental), and Form Builder. The 'Practice Management' column includes Billing Reports.

Admissions	Clinical Forms	Treatment Planning
Face Sheet	Assessment Forms	ITP Builder
Pre-Admit Forms	Scheduled Forms	Problem List
Bed Management	Unscheduled Forms	Medication Plan
Program Transfer or Client Discharge	Follow-Up Post-Discharge Forms	Medication History
Case Assignments	Weblink Inbox - Attach Forms	DSM-5
		eMAR
		Insig Telehealth

Reports	Admin Tools	Practice Management
Administrative Reports	Treatment Plan Template and Program Setup	Billing Reports
Document Center	System Setup	
Reports	System Setup (Supplemental)	
Personal Productivity	Form Builder	
Export Form Data		

Accessing Dr First

MEDICATION PLAN

BEGIN ENTERING LAST NAME AND CLICK ON CLIENT TO SELECT:

Test, Kiaya

SEARCH BY BIRTHDATE FORMAT: MM/DD/YY MM/DD/YYYY

Name: Test, Kiaya
Gender: Female
Date of Birth: 7/24/1950
Admit Date: 11/2/2022
Primary Clinician: NextStep Solutions

Programs: Outpatient
Social Sec. No.:
Case No.: 1003-1
Client Ref. No.:

Medication Plan

DrFirst

Main Menu

Adding Allergies and Setting a Preferred Pharmacy

The screenshot displays the 'Prescription Summary' page for a patient named Kiaya Test. The interface includes a top navigation bar with the NextStep Solutions logo and a hamburger menu. On the right, there are notification and user profile icons, with the user identified as 'DemoThree Provider, MD' from 'NextStep Demo Practice'. Below the navigation bar is a 'PatientAdvisor' section with tabs for 'Patient Scorecard', 'Patient Support', 'Clinical Decision Support', and 'Prior Authorizations'. The main content area shows the patient's name 'Kiaya Test', birth date '07/24/1950', gender 'Female', and age '72 years'. An 'ENCOUNTER' tab is active. Below this, there is a 'Create New Rx' button and a dropdown menu for the pharmacy, currently set to 'Farooq Test Pharmacy (C) (R) (E) - 232 Kansas City lane, Kansas ...'. The patient information section is divided into three columns: 'Patient' (with consent options 'Yes' and 'No'), 'Pharmacy' (with the same dropdown as above), and 'Prescription Benefit' (set to '-No Prescription Benefit Selected-'). A table below provides details for 'SEX' (Female), 'DOB' (07/24/1950), 'PREGNANT' (checkbox), and 'BREASTFEEDING' (checkbox). The 'ADDRESS' is '123 Home St, Lakewood, CO 80227' and the 'MOBILE PHONE' is '(555) 547-8214'. At the bottom right, there are links for 'Clinical Reports', 'Provider', and 'Patient'.

NEXTSTEP SOLUTIONS Prescription Summary

DemoThree Provider, MD
NextStep Demo Practice

PatientAdvisor Patient Scorecard Patient Support Clinical Decision Support Prior Authorizations

Kiaya Test | 07/24/1950 | Female | 72 years ENCOUNTER

Create New Rx ★ Farooq Test Pharmacy (C) (R) (E) - 232 Kansas City lane, Kansas ...

Patient

Kiaya Test 07/24/1950 female

Patient Consent: Yes No


Pharmacy: Farooq Test Pharmacy (C) (R) (E) - 232 Kansas City lane, Kansas ...



Prescription Benefit: -No Prescription Benefit Selected-

SEX Female	DOB 07/24/1950	PREGNANT <input type="checkbox"/>	BREASTFEEDING <input type="checkbox"/>	ADDRESS 123 Home St Lakewood, CO 80227	MOBILE PHONE (555) 547-8214
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Clinical Reports: Provider Patient

Adding Allergies and Setting a Preferred Pharmacy

Kiaya Test | 07/24/1950 | Female | 72 years ENCOUNTER  

Create New Rx  Click icon at right to select a pharmacy 

No drug allergies have been entered for the patient. Drug allergy details are important for detecting potential adverse reactions as prescriptions are written. [Please confirm this patient's allergies.](#)
No pharmacy is selected for this patient. [Please set the default pharmacy.](#)

Allergies

Allergies Not Entered

Mark patient NKDA 



Allergies

Allergen

Penicillins

Search

Reaction(s)

Search for Reaction

Add Reaction

Selected Reaction(s)

Rash

Severity

Search for Severity

Add Severity

Selected Severity


Mild to Moderate



Onset Date

Save

Cancel

Adding Allergies and Setting a Preferred Pharmacy

Kiaya Test | 07/24/1950 | Female | 72 years ENCOUNTER  

Create New Rx  Click icon at right to select a pharmacy 

No drug allergies have been entered for the patient. Drug allergy details are important for detecting potential adverse reactions as prescriptions are written. [Please confirm this patient's allergies.](#)
No pharmacy is selected for this patient. [Please set the default pharmacy.](#)

Select Pharmacy

List
 Practice List Favorites List All Lists
Pharmacy Type
 Retail Mail Order Specialty Long Term Care In-House Dispensing
Pharmacy Options
 24 hours EPCS enabled

Name
Test

Address City State
Kansas

Zip Phone Fax

Search Cancel

Retail Pharmacies

Showing 1 - 10 of 20 Retail pharmacies found

[Click row to add pharmacy to the patient pharmacy list.](#)

First Previous 1 2 Next Last

Name	Address	Phone & Fax	Type	Actions
CHICAGO, KS				
Wag1StoreTest1234579serdttfguhjok3467890cvbWag1StoreTest12345 #21002	555 South ST1234567890fhjhk134567868907, 14 North ST1234567890fhjhk1345678689078 (NEC OF SENECA & 31ST)	Phone: (316) 522-7489 Fax: (316) 522-8658	C R 24 E	
DIAMOND, KS				
Test Diamond Pharmacy	123 Diamond St.	Phone: (785) 232-3606 Fax: (785) 232-4917	C R E	

Adding Medication History

Medications

PDMP Summary [View PDMP Data](#)

Active Medications [Review](#) Status: Unknown or Incomplete [🔗](#) [📅](#)

Medications Not Entered

[Add Medication](#) [Show Medication History](#)

levothy [🔍](#) [Clear](#) [★](#)

- levothy
- levothyroxine (bulk) powder
- levothyroxine capsule
- levothyroxine recon soln
- levothyroxine solution
- levothyroxine tablet
- Euthyrox (levothyroxine) tablet
- Levo-T (levothyroxine) tablet
- Levoxyl (levothyroxine) tablet
- PCCA T4 Sodium Dilution (levothyroxine (bulk)) powder
- Synthroid (levothyroxine) tablet
- Thyquidity (levothyroxine) solution

Add Medication

levothyroxine 112 mcg tablet 112 mcg tablet [v](#)

Provider
[Select provider...](#)

Patient Directions
[Take](#) [📅](#) 1 [v](#) tablet [v](#) by mouth [v](#) once a day [v](#)
[-- Other --](#) [v](#)

Additional Directions To Patient

Days Supply [-- Select --](#) [v](#) Quantity tablet [v](#) Refills 0 [v](#) [Substitution permitted](#) [v](#)

Start Date [v](#) [v](#) [v](#) Today Stop Date [v](#) [v](#) [v](#) Today Last Written Date [v](#) [v](#) [v](#) Today

Med Hx Source [v](#)

Directions To Pharmacist



Primary Diagnosis [--Select--](#) [v](#)





Secondary Diagnosis [--Select--](#) [v](#)

Comments For Office Use Only

[Add](#) [Close](#)

Creating and Sending a New Prescription


Kiaya Test | 07/24/1950 | Female | 72 years ENCOUNTER  

Create New Rx    

Patient


Kiaya Test 07/24/1950 female



Pharmacy

Patient Consent: Yes No 


SEX	DOB	PREGNANT	BREASTFEEDING
Female	07/24/1950	<input type="checkbox"/>	<input type="checkbox"/>

Select Medication for Prescription

Prescription Benefit
-No Prescription Benefit Selected- 

 **Clear** 


Showing your selection - Select a medication to prescribe

Lexapro (escitalopram oxalate) tablet 

5 mg

10 mg

20 mg

 Enter free text "Lexapro (escitalopram oxalate) tablet" as medication

Creating and Sending a New Prescription

Prescribe Medication

Kiaya Test 07/24/1950 | Female | 123 Home St. Lakewood, CO 80227 | Mobile: (555) 547-8214

Patient Observation

Height: (In) (Cm) Date: Never (Lb) (Kg) Weight: (Lb) (Kg) Date: Never

Lexapro 10 mg tablet *

Provider:

Pharmacy:

Patient Directions *

Take by mouth

Additional Directions To Patient

Days Supply: Quantity: Refills: Substitution permitted

Directions To Pharmacist


Primary Diagnosis:

Secondary Diagnosis:

Comments For Office Use Only

Creating and Sending a New Prescription


Review Prescription

 **Kiaya Test** 07/24/1950 Female 123 Home St. Lakewood, CO 80227 Mobile: (555) 547-8214

Patient Allergies: Penicillins (Mild to Moderate: Rash)

Lexapro 10 mg tablet

Directions	Take 1 (one) tablet by mouth once a day
Quantity	**30** (thirty) tablet
Refills	**none** Substitution Permitted
Days Supply	30 days
Diagnosis	ICD-10 F10.220 (Alcohol dependence with intoxication, uncomplicated)
Order #	ST1-173001640598

Internal Use Only: Stop Medication On: 12/02/2022 

Provider	Demo Three Provider, MD 9420 Key West Ave, Rockville, KS 20850 Phone: (888) 271-9800 NPI: 1965101656 Fax: (301) 345-0000 DEA: AU0216362 KS Lic #: KS1234 MD Lic #: AL1027164231
Pharmacy	Farooq Test Pharmacy 232 Kansas City lane Kansas City, KS 66210 Phone: (816) 234-9893 Fax: (714) 889-1220 NCPDPID: 9999981

Save Pending Rx Save and Add Rx **Back** **Cancel**



Creating and Sending a New Prescription

Prescription Management

Drug Type: All Drugs | Status: Pending

Search

Displaying 1 total Pending prescription

Deselect All

Status	Drug	Directions	Qty	Rfl	Notes	Dr/Staff	Last Modified	Serial #	Actions
Kiaya Test 07/24/1950 Female 123 Home St. Lakewood, CO 80227 Mobile: (555) 547-8214									
<input checked="" type="checkbox"/>	Lexapro 10 mg tablet	Take 1 tablet by mouth once a day	30 tablet	none		DP	11/02/2022	SA-173001640598	

Deselect All

Medications

PDMP Summary View PDMP Data

Active Medications Review Status: Unknown or Incomplete

Select All

Name	Directions	Qty	Rfl	Start	Stop	Last Written	History Source	Action
<input type="checkbox"/> levothyroxine 112 mcg tablet	Take 1 tablet by mouth once a day.	tablet	none					
<input type="checkbox"/> Lexapro 10 mg tablet	Take 1 tablet by mouth once a day.	30 tablet	none	11/02/2022		11/02/2022		

Syncing Medications into Med Plan

MEDICATION PLAN

BEGIN ENTERING LAST NAME AND CLICK ON CLIENT TO SELECT:

SEARCH BY BIRTHDATE FORMAT: MM/DD/YY MM/DD/YYYY

Name:	Test, Kiaya	Programs:	Outpatient
Gender:	Female	Social Sec. No.:	
Date of Birth:	7/24/1950	Case No.:	1003-1
Admit Date:	11/2/2022	Client Ref. No.:	
Primary Clinician:	NextStep Solutions		

Medication Plan

DrFirst

Main Menu



Confirm

Would you like to sync this client's meds from ePrescribe into NextStep?

Cancel

OK

Medications:

Lexapro ⓘ ⓘ 10 mg tablet Take 1 tablet by mouth once a day oral - (30 / 0) Print [Stop Medication](#)

levothyroxine ⓘ ⓘ 112 mcg tablet Take 1 tablet by mouth once a day oral - (0 days / 0) Print [Stop Medication](#)

All

[Override Start Date](#)
[Override End Date](#)

[Override Start Date](#)
[Override End Date](#)

Allergies:

Penicillins(O): Rash,

Dr First Reports

Path: Left Hand Menu > DR FIRST - REPORT

The screenshot displays the NextStep Solutions web application interface. On the left is a dark blue sidebar menu with the following items: MAIN MENU, REMINDERS, DRFIRST - REPORT (highlighted with an orange border), DRFIRST - MESSAGES, CHANGE PASSWORD, CHANGE LOCATION, PRINT, and LOGOUT. The top of the sidebar features the NextStep Solutions logo and the text 'Provider A (dprovider8817) @ Short Name'. The main content area on the right is light blue and contains a 'Face Sheet' button under an 'Admissions' header. A red arrow points to the 'Face Sheet' button.

Dr First Reports

Prescription Summary

Provider: All Providers Patient: Blank for All or Select a Patient Drug Type: All Drugs Status: Pending

Search

Displaying 4 total Pending prescriptions for All patients

Deselect All

Status	Drug	Directions	Qty	Rfl	Notes	Dr/Staff	Last Modified	Serial #	Actions
<input checked="" type="checkbox"/>	Mary Candace 05/18/1995 Female 3201 University Dr. Auburn Hills, MI 48326								
<input checked="" type="checkbox"/>	Kaletra 200 mg-50 mg tablet	Take 3 tablet by mouth single dose as needed for pain	3 tablet	none		ND/DP	11/21/2022	SA-173001664995	
<input checked="" type="checkbox"/>	Protect Iron 60 mg iron-1 mg tablet	Take 3 tablet by mouth single dose as needed	3 tablet	none		ND/DP	11/21/2022	SA-173001664996	
<input checked="" type="checkbox"/>	Regression Test Regression Test 11/02/1995 Female 3201 University Dr. Auburn Hills, MI 48326								
<input checked="" type="checkbox"/>	abacavir 300 mg tablet	Take 1 tablet by mouth single dose	14 tablet	none		ND/DP	11/09/2022	SA-173001638596	
	T.E.D. Anti-Embolic Stocking Partial prescription. Unsendable.	Administer 2 ampul a small amount three times a day	0	none		ND	11/02/2022	SA-173001638595	

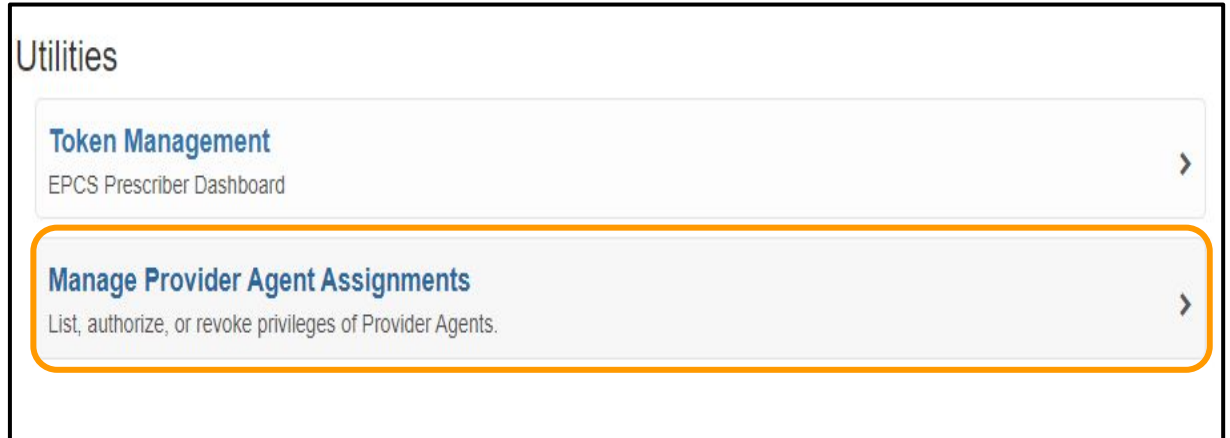
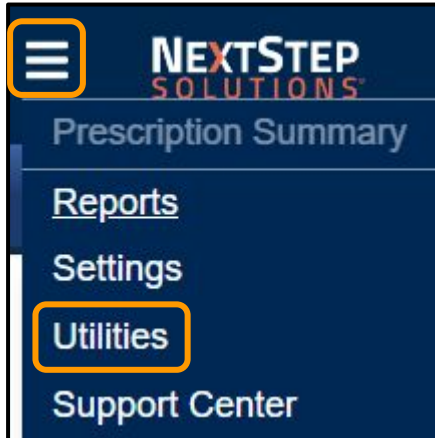
Deselect All

Send Send & Print Print don't Send Sign don't Send



Setting up Proxy Access

Path: Left Hand Menu > DR FIRST - REPORT > Hamburger Icon > Utilities > Manage Provider Agent Assignments



Setting up Proxy Access

Manage Provider Agent Assignments ◀ Back

User To Manage*
Provider, DemoThree

Authorized Agents

Filter With Last Name or First Name

Authorized Agent	Username	
Aagent, NextStepDemoPractice, N	naagent1633	Revoke▶
Admin, Test	tadmin8740	Revoke▶
Clinical, Fourth	fcclinical7057	Revoke▶

Available Staff

Filter With Last Name or First Name

Available Staff	Username
Acstaff, NextStepDemoPractice, N	nacstaff1301
Admin, Test	tadmin3327
Adminone, Test	tadminone
Clinical, Fifth	fcclinical6107
Clinical, Second	scclinical3218
Clinical, Third	tcclinical4187

I affirm that I am an authorized representative of this practice with authority to configure Provider Agents.

Approve Changes

Dr First Workflow in NextStep Solutions Demonstration



Let's get started

Q&A

Adding on Dr First

If you would like to add Dr First, please reach out to your Account Manager.

Resources

- [Dr First \(ePrescribing\) Quick Reference Guide](#)