Order Connect NX

myUnity User Guide

Netsmart

www.ntst.com

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Overview

OrderConnect-NX (OC-NX) is a secure, web-based and medication management system that integrates with myUnity to enhance patient safely and increase physician productivity. Within OrderConnect-NX there are multiple tabs that allow a user to navigate around the solution and perform certain activities.

This User Guide is arranged to familiarize you with the basic functions of the OrderConnect-NX application, and each tab of the application has a section in this document.

If you have any questions or need assistance using the OrderConnect-NX application, please call the OrderConnect-NX administrator within your facility.

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Access

Prerequisites:

- Windows computer
- OC-NX works on any browser
    - OrderConnect (https://orderconnectnx.netsmartcloud.com) must be listed as a trusted site.
    - OrderConnect (https://orderconnectnx.netsmartcloud.com) must be viewed in Compatibility Mode.

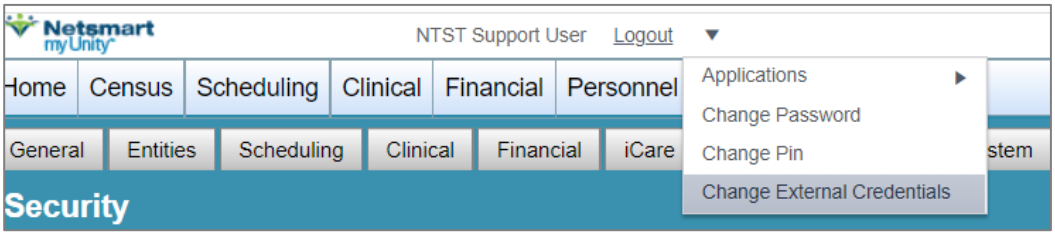
For sites not using Single Sign-On

- Log into OrderConnect at https://orderconnectnx.netsmartcloud.com

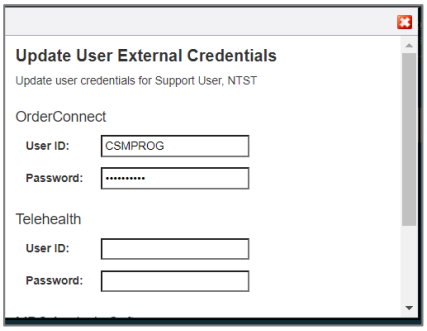
Establishing Single Sign-On for OC-NX

When first accessing OrderConnect, it is important that the change/external credentials for each end user is updated. The user will need to enter their OrderConnect username and password here in order to Single sign on into OrderConnect. Below are the steps on how to update those credentials:

1. First time Login- User must click on Administration Menu.
2. Choose “Change External Credentials” then go to the dropdown and select Change External credentials.



3. Enter the OrderConnect-NX username and password and click Enter. Do not include the Facility code. Example- if a username is 1234CSMPROG then the username in the change external credentials will be CSMPROG.



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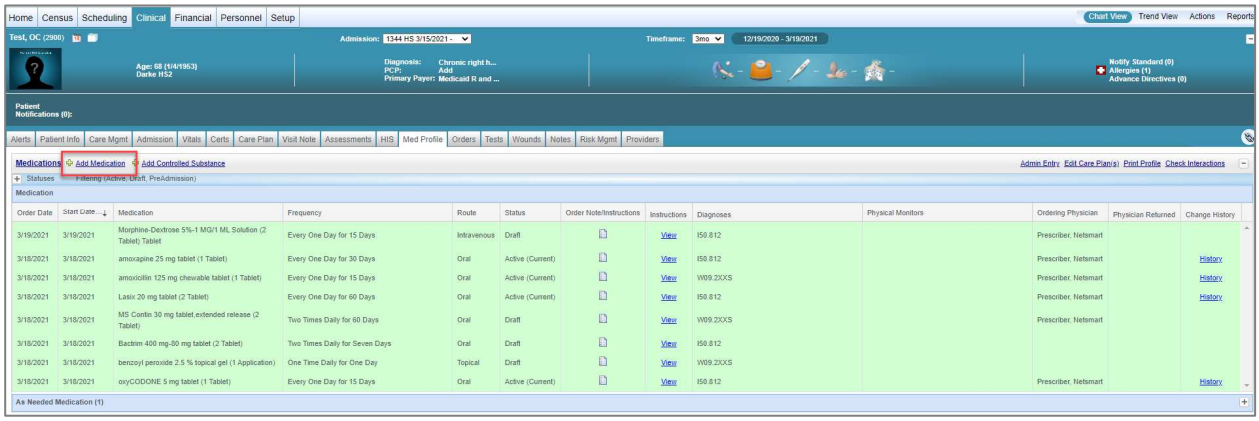
Accessing OC-NX from myUnity Back Office

Once logged into myUnity, these are steps to open OC-NX:

1. Search for the patient and select the clinical chart.

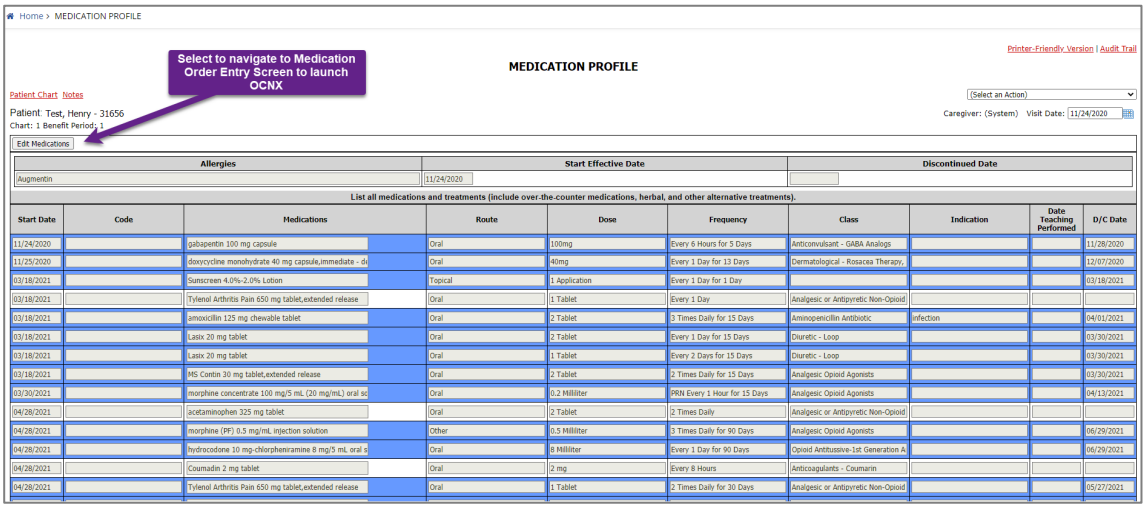
2. Select the Medication profile.

3. Click on **Add Medication** (if all orders are going into OrderConnect). **Click on Add Controlled Substance** (if only Controlled Substances or Discharge medication orders are entered in OrderConnect).



Accessing OC-NX from myUnity Clinical

If the clinician's default login application is myUnity Clinical, then proceed to selecting a patient > select patient chart > Medication Profile > Edit Medications.



- Then the clinician will see the Add Medication/Add Controlled Substance from the Medication Order Entry screen.

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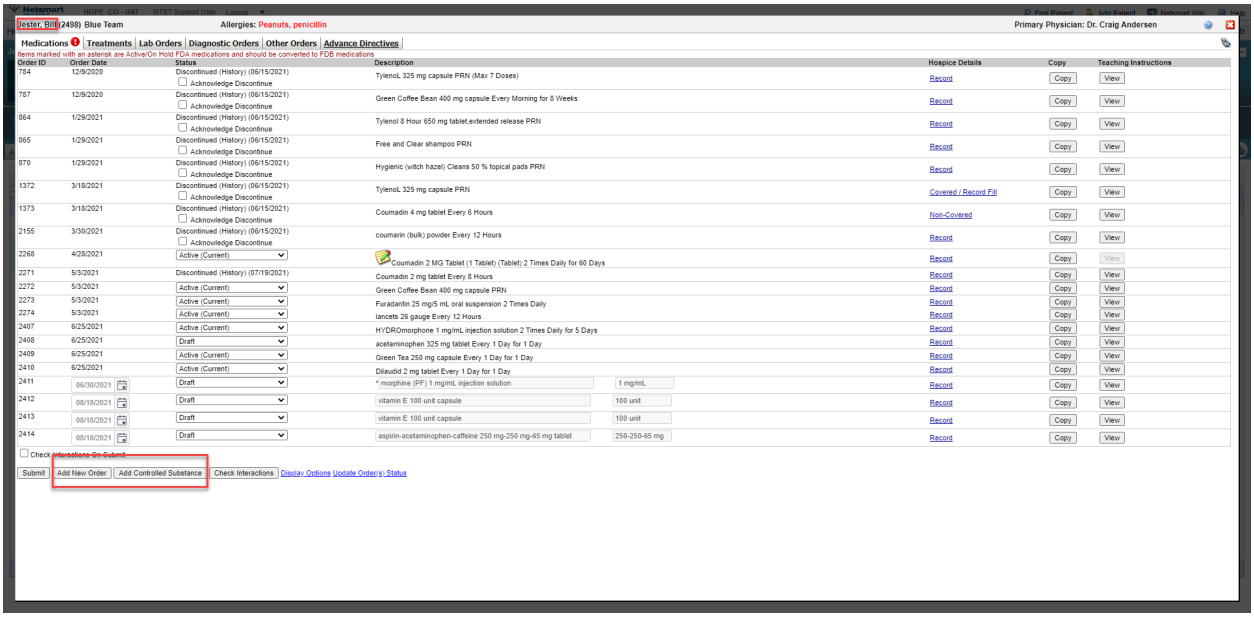

- From here, OCNX will launch in a new browser.

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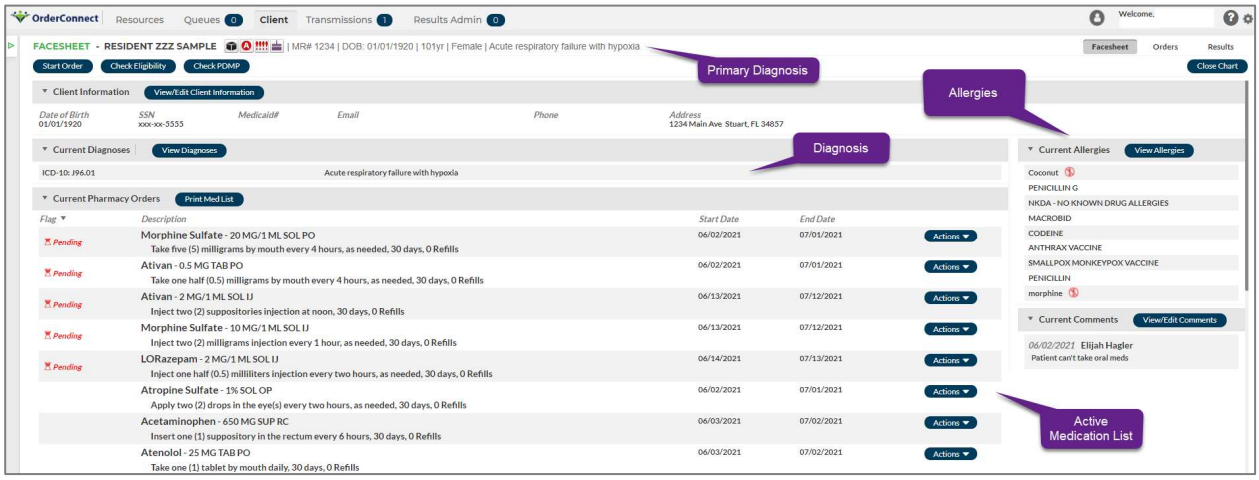
Order Connect Prescribing Events

Facesheet

The Facesheet tab is the home page of all client records. This tab provides a high-level overview of the patient record as well as providing navigation to other areas within OrderConnect-NX, and this is the screen from which most of your work will originate.

The Facesheet will list

- all active diagnoses
- basic demographic information
- any known allergies
- all current medications
- icons indicating if there are possible adverse drug to drug/food interactions, etc., or black box warnings.



Note: the demographic information displayed on the Facesheet is coming from myUnity. If any information needs to be updated for the patient, it should be updated in myUnity.

Facesheet Icons

Icon	Description
	Potential drug to drug/food interactions: the number of exclamation points changes based on the severity of the interaction. Selecting the icon will display the interactions.
	Medication Allergies
	Age-based Prescribing Guidelines: if enabled will provide information for medications with age-based suggestions.
	Allergy Interactions: Icon indicates that no allergy interactions were not checked for this allergy displayed
	Blackbox warnings: used to communicate rare but dangerous side effects. Selecting the icon will display the interactions.

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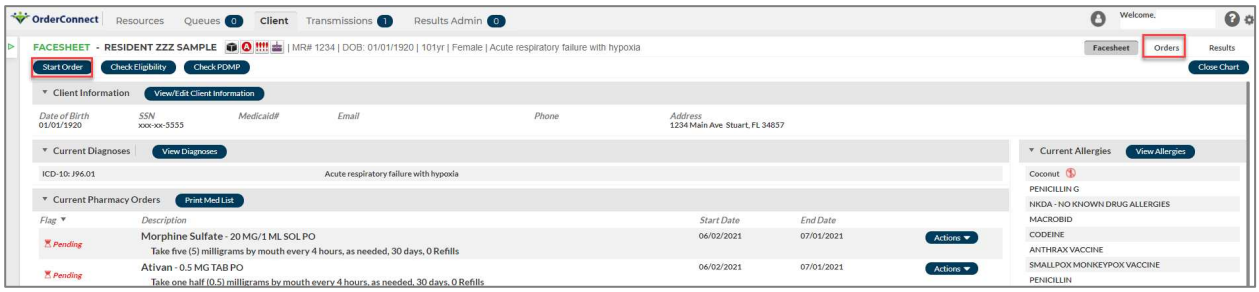
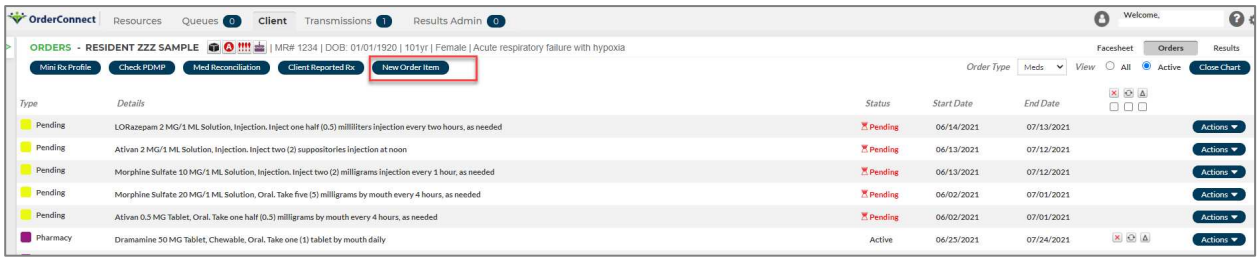
Prescribing Scenarios

Entering a NEW Medication Order

- To start a new Medication Order, navigate to the Facesheet of the patient and select the Orders tab or Start Order.



- On the Orders tab, select New Order Item.



- Begin by searching for a medication. The RX library will default to My Practice but can be changed.

  - **My Practice-** This library is based on the **prescriber** that's currently logged into OrderConnect. This library refreshes nightly.
  - **My Group-** This library is based on all prescriber orders at the facility but **excludes the prescriber logged into OrderConnect.** This library refreshes nightly.
  - **OrderConnect Practice-**This library is based on all prescribers utilizing OrderConnect across the United States, but **excludes the prescriber logged into OrderConnect.** This library refreshes nightly.
  - **All Drugs-** This library simply displays medication names found in the Micromedex master library that match the search criteria.
- Enter in first few letters of desired medication, or add the diagnosis to narrow the search.
  - Can also use Additional Med filters.
- Click search and Medication options will display with different strength/form/routes of the medications.
  - Select the appropriate medication for the order.

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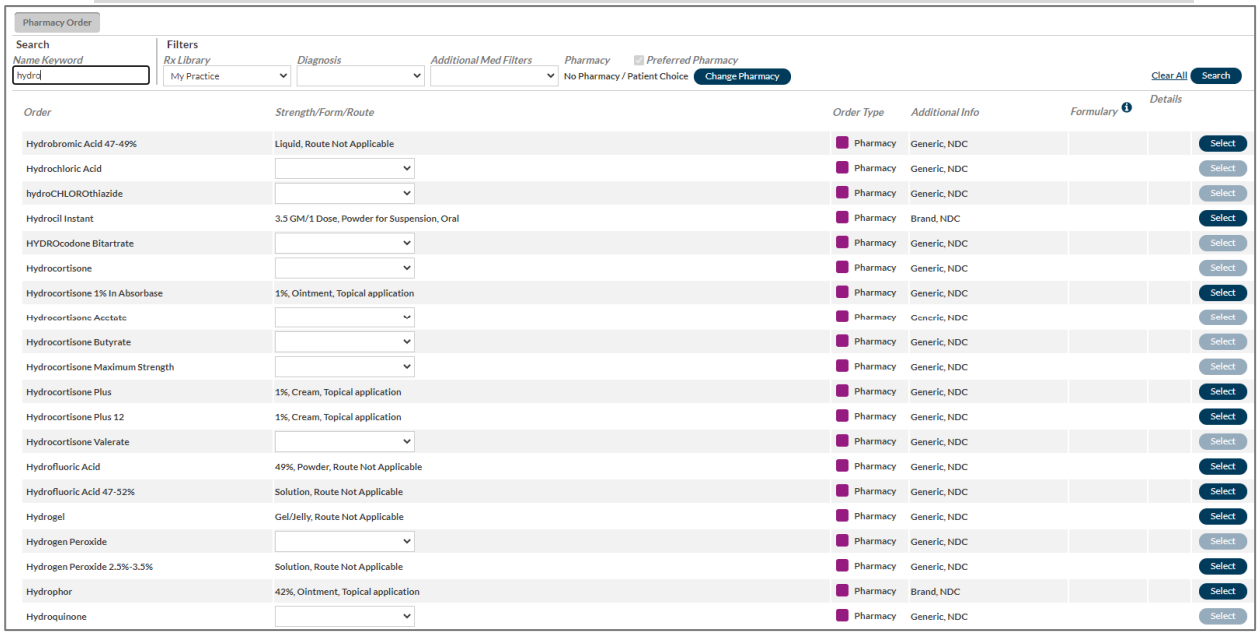
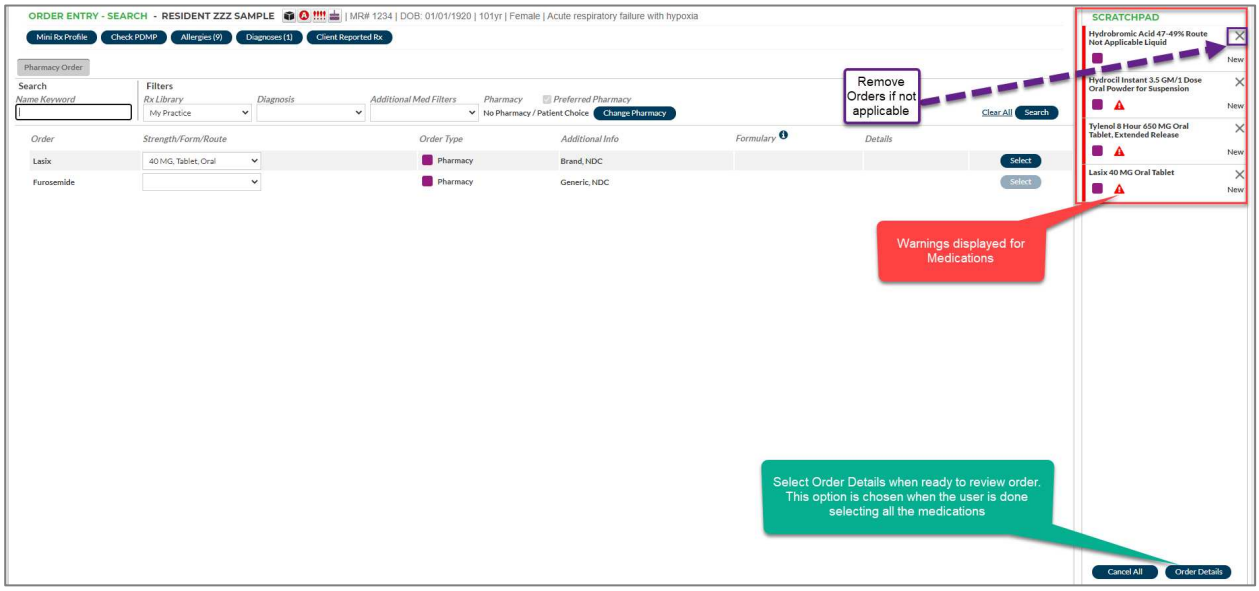
- Click on appropriate selection for Strength/Form/Route in the drop-down.

Note: Only medications and their doses that are currently available on the market will display in the dropdown. Medication availability and all interaction information as well as medication leaflets are updated every 30 days.



- As medications are added, the orders will display on the scratchpad (right hand side of screen. Repeat steps as needed until all medications have been added.
- Select Order Details (bottom right corner) to review the orders.



- Required fields are in red.
  - After Dose, Unit, and Frequency have been entered the directions are auto-calculated.

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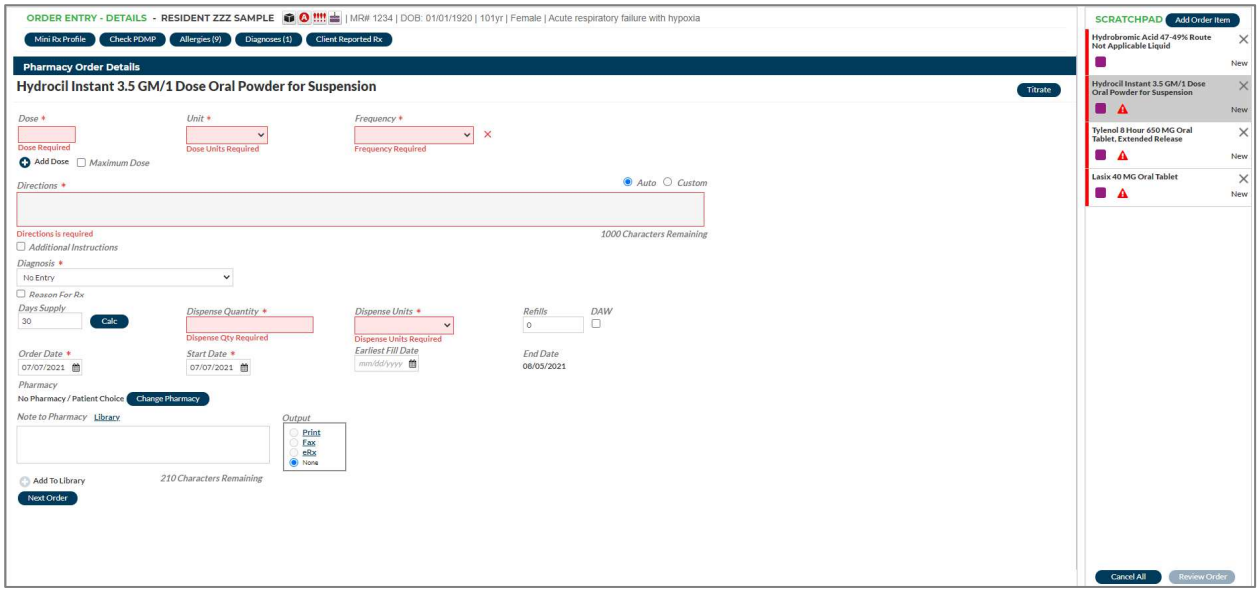
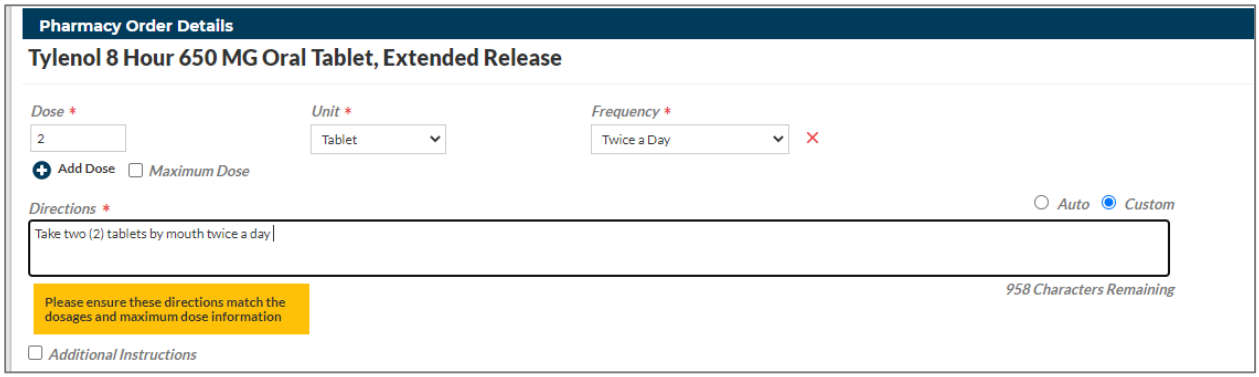


- If choosing custom directions, a warning will emphasize that the user should check Dose, Unit, and Frequency.
- Directions flow back to the notes of the order in myUnity.



- Select Add Dose to add additional doses, which will allow for multiple frequencies.
  - For example, if you have a medication order for two times daily but also PRN, the user can select Add Dose to add the additional frequency.
  - Tip: If multiple strengths and forms of a medication are desired, users may click on the small plus sign (+) to the left of the medication name on the Custom Orders screen to create an additional entry on the order for the same medication. Each entry would then be dosed separately.
- Additional instructions can be entered, but these will stay in OrderConnect and not flow back to myUnity.
- A diagnosis can be tied to an order and is typically required for a controlled substance, creating an association between the medication and the client diagnosis.
  - This builds the user libraries accessible from Order Entry > Search as well as in OrderConnect reports.
    - Failure to select a diagnosis will trigger a reminder message.
    - OC-NX does not check for off-label prescribing.

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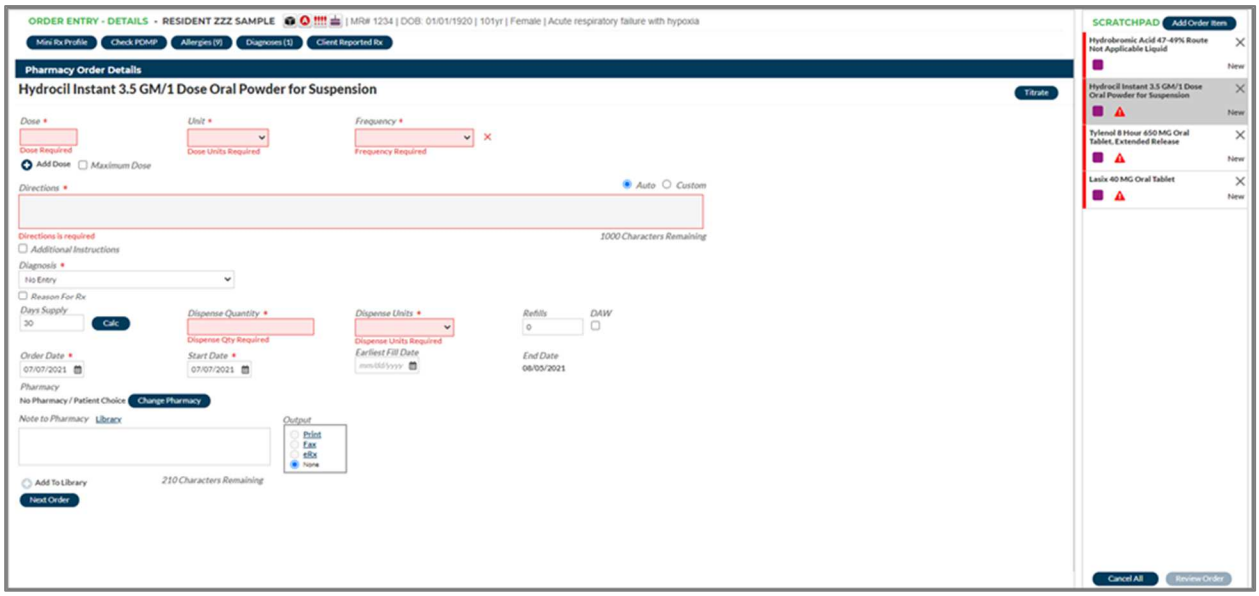
- Tip: If the medication being ordered is not related to a listed diagnosis, the user may select “No Entry” to proceed with the order.

- Reason for RX can be added to the order, and will be sent to the pharmacy in the Note to Pharmacist field.
- Day supply quantity defaults but can be changed, and can be left blank for open ended orders.
- Dispense quantity is calculated from Dose/Unit/Frequency and Days supply of the order. If Days Supply is adjusted the Dispense Quantity will be re-calculated.
- Dispense Units are typically the same as the unit of the order.
- Refills are only used for non-controlled meds or controlled meds, schedules III-V. Schedule II medications cannot have refills.



- Enter the Order date and Start date. These will default to current date but can be changed and can be different from one another, although the start date cannot be earlier than the order date.
    - The End date of the medication is not an editable field. It is auto-calculated based on start date, number of days supply plus refills (if applicable).
- Earliest fill date: The DEA states that this field should be completed if (1) a prescriber or agent prescribes more than one schedule II medication of the same strength, form and route at a time or if there is already an active order for the same medication of the same strength, form and route; or (2) if a prescriber or agent reorders a schedule II medication with days remaining.
  For organizations that have gone through Netsmart’s implementation of EPCS, OrderConnect makes this a required field under these workflows. Although the field is not required in other circumstances it can be used anytime a prescriber wishes to convey to the pharmacy an Earliest Fill Date for the medication. This date will appear on all prescription output types.

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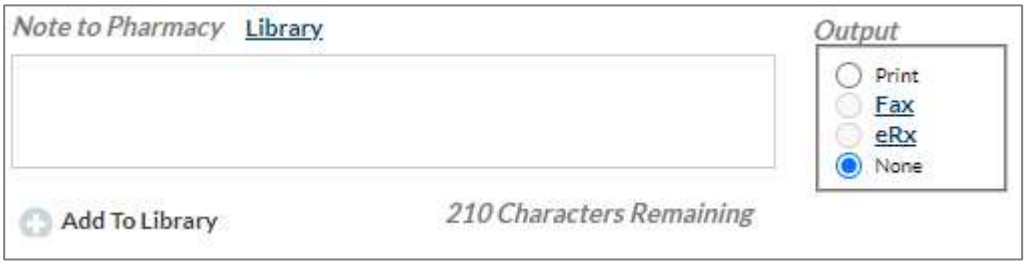
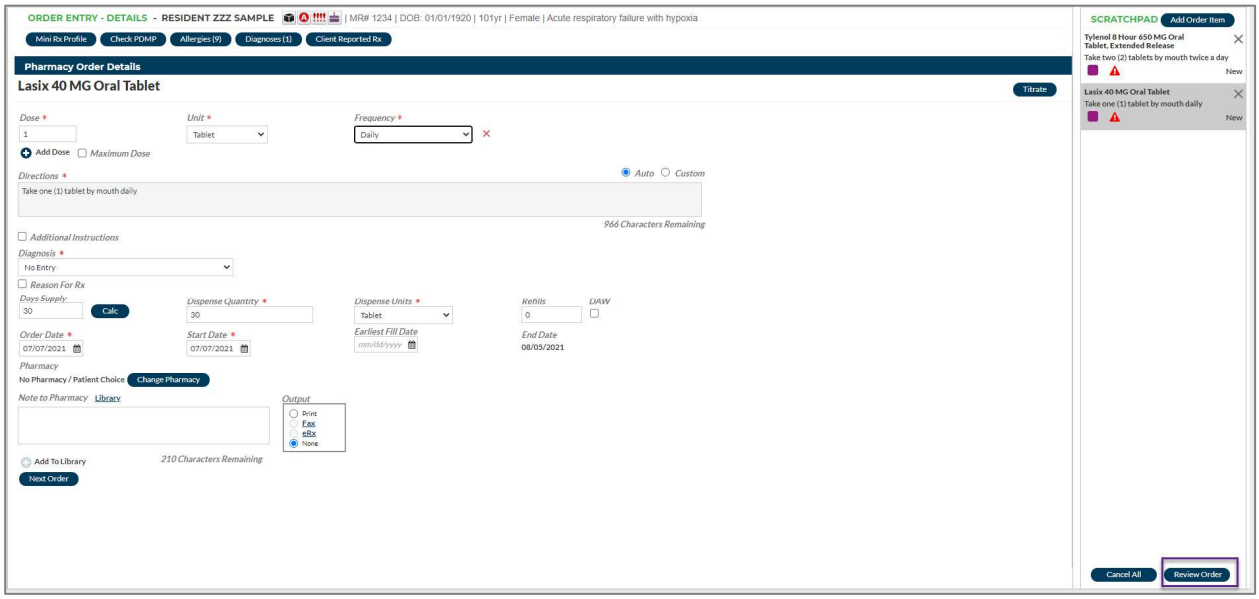
- Indicate DAW if the medication is to be Dispensed as Written; orders not selected as DAW will be recorded and output as Substitutions Allowed.
- Select the pharmacy from the Order Entry screens.
- The Note to Pharmacy will go directly to the pharmacy. All notes can be kept in a library to easily select for other medication orders.
    - Each individual user has a Note to Pharmacist library that cannot be shared among users.



- Verify all items are correct before proceeding to the next order; select the next order from the scratchpad or select Next Order.
- After verifying all orders items are correct select Review Order for validation.



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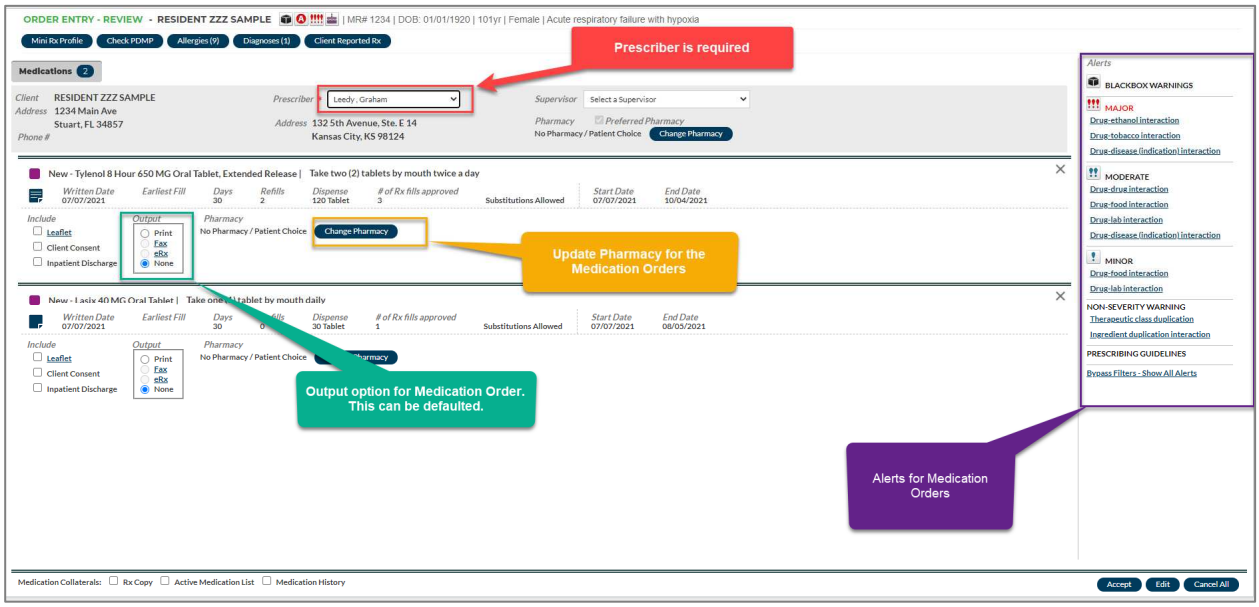
Order Entry Review



- Selecting a prescriber is required for the Medication orders. The prescriber selected here is the prescriber/provider that is ordering the medication(s).
    - If the user logged in is a prescriber, their name will automatically appear in the prescriber box. If the user logged in is entering an order on behalf of a prescriber, the dropdown box must be used to select the prescriber on whose behalf the Verbal Order is being written. The order cannot be submitted without a valid prescriber name in the 'prescriber' box.
    - A supervised staff member may be required to select a supervising physician.
- The user can select all warnings for the medication orders. The warnings for the medication orders will be displayed by severity.

    Note: Your facility system administrator may require that users acknowledge and/or input an override reason when certain types of alerts are present during the prescribing event. Please check with your facility administrator regarding the policy at your facility.

- Output option- In UAT Environments, this will default to NONE. In Production environments, this will default to e-RX. The clinician can always print the order or fax the order as well. These options can be updated before accepting the order.
    - **Print**- Sends the order to a local printer using the computer's Windows print manger.
    - **Fax**- Sends the order directly from the application to the fax number associated with the pharmacy selected at the top of the confirmation/review. The fax option will be available if the selected pharmacy has a valid fax number within their listing in OrderConnect.
    - **eRx-** Sends the order via electronic transmission to the pharmacy selected at the top of the confirmation/review screen. The eRx option will be available for an order under the following circumstances.
        - The client record contains a valid date of birth and full address.

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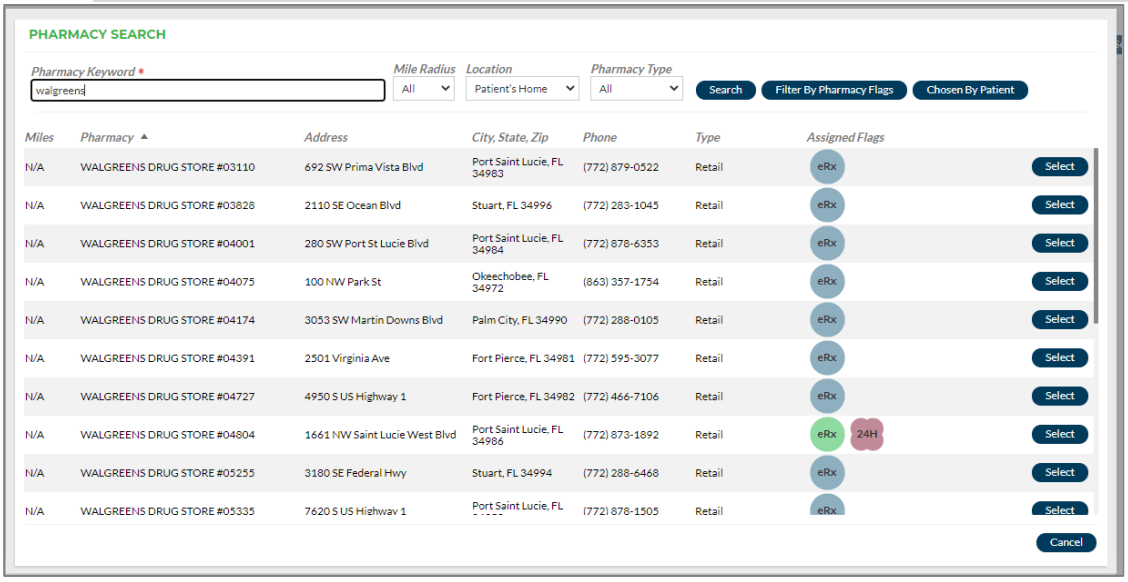
- The Prescriber and Pharmacy are both Surescripts-certified.
- The order does not contain a controlled substance.

Note: The type of output for a facility can be defaulted by the facility administrator in the OrderConnect Admin Tool. This is a facility setting. If the desired option is not available, the application will default to PRINT.

- TIP: If a desired output option is not available, users can hold the cursor over the desired option and obtain and explanation as to why that output option is not being presented as available.

- Pharmacy for Medication orders- The pharmacy can be selected pertaining to the order or the patient. To select the pharmacy of choice when sending the prescription electronically, the user will select 'Change Pharmacy.'
  - The user can search by location. If the pharmacy has an **eRX** icon then that means that is a e-RX pharmacy that has been registered with Surescripts. If an eRX icon is not located by the pharmacy, then that pharmacy would not be eligible for electronic prescription orders. These orders would need to be efaxed to the pharmacy.
  - The user will start by searching for the Pharmacies. Once the appropriate pharmacy is located, the user will select it and that will be the Pharmacy attached to the order.
  - TIP: After pharmacy is selected, you may associate is as the patient's Preferred Pharmacy by clicking on the Preferred Pharmacy check box to the right of the pharmacy option. The word SAVED will appear in red when a new pharmacy is saved as the patient's default. A prompt will appear on the screen asking if you'd like to use the selected pharmacy as the default for all medications in the order.

Note: If the patient's preferred pharmacy cannot be located in the pharmacy search, please contact your facility's system administrator for assistance. OrderConnect Support does not have access to add a pharmacy for a facility.



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- The user can include Leaflets, Client Consents, and an Inpatient Discharge flag to the medication orders. The user also has the ability to select 'RX Copy' (which will give an RX copy of the order submitted), Active Medication List, and Medication History. If these items are selected they will print when submitting the order.
    - **Leaflet-** Patient Education Leaflets are written on a 6th grade reading level and are available in up to 17 languages. They are updated every 30 days.
    - **Consent-** The Client Consent form is a standardized consent form that cannot be customized by the facility. Each Client Consent automatically generates a copy of the Education Leaflet. Therefore, the leaflet option will be grayed out whenever Client Consent is selected.
    - **Inpatient Discharge-** Used for discharge medication orders.

- Accept the Order to submit.
    - To change the order before submitting, select Edit.
    - To cancel the order, select Cancel All and the entire order will be cancelled.

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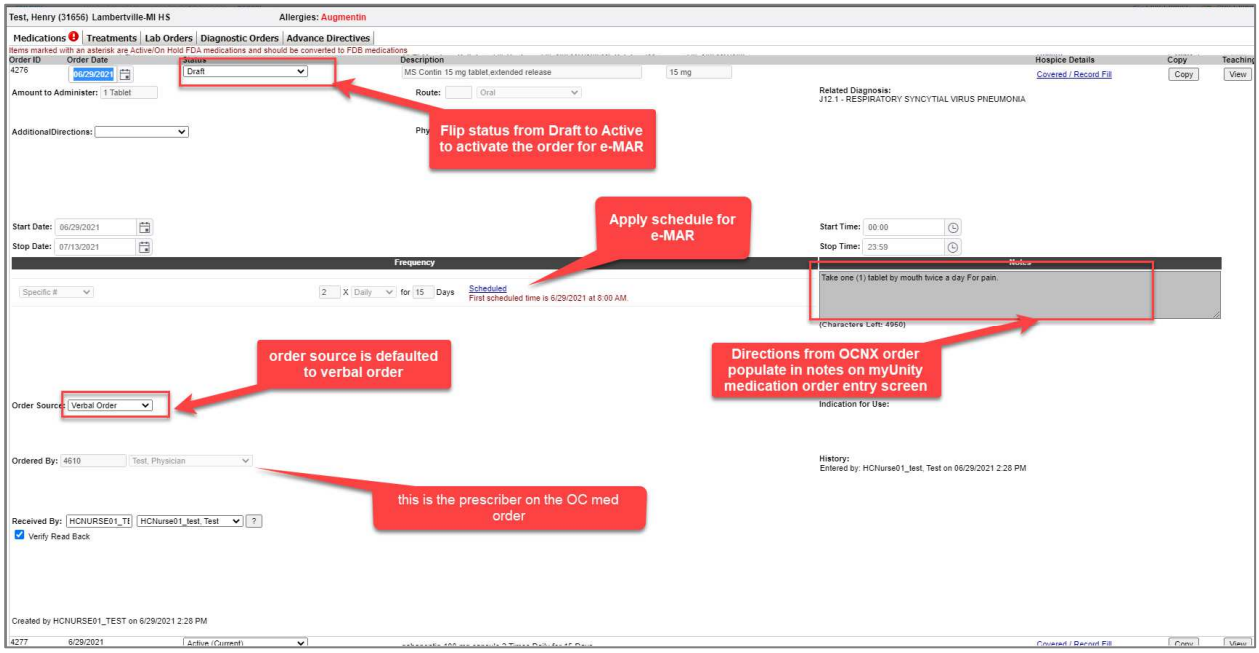
Activating Orders in myUnity

After the orders are added with Single Sign On (SSO) from myUnity to OC-NX, then the orders will populate on the medication profile inside of myUnity. The nurse/agent is typically required to activate the medication for Medication Administration (e-MAR). The nurse can select the Status dropdown and select Active (Current) to activate the order. The active medication status is used to provide an accurate list of Active medications on the medication profile.

Enterprise ONLY: When the medications become activated on Medication Entry Screen they will also populate as active medications inside of Clinical.



- During the 'Activation' process in myUnity, the 'standard clinical times' that can auto populate the schedule, the org parameters that allow them to auto populate the source, and the 'Add/Update Drug Classes' option that allows 'phys mons' to be auto-added based on the drug class.
- **Enterprise Outpatient ONLY**- The Outpatient Controlled substance medication orders can be auto-activated prior to the orders being approved by the providers. This allows for medication administration for the patient.
- When finished up with the order, Submit the order at the bottom. Orders become activated on Medication Profile.

- **Enterprise ONLY**- Active/Discontinued Medications will be displayed on Medication profile inside of myUnity Clinical.

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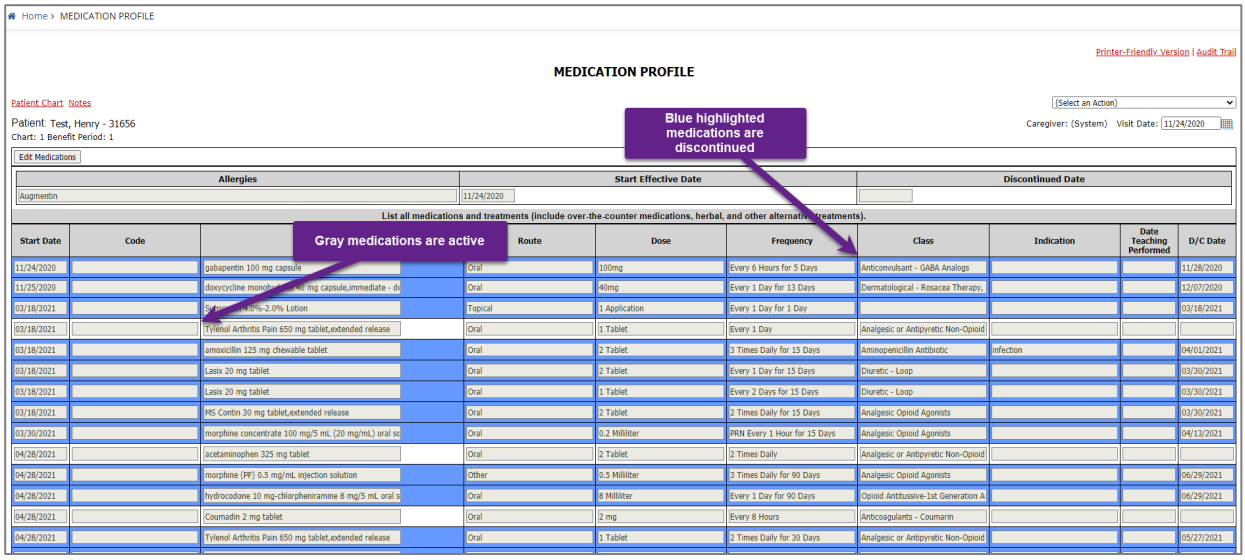

- Medication statuses can only be updated inside of OrderConnect-NX. For orders submitted in OC-NX, the statuses cannot be updated through myUnity, only OC-NX.

Prescribers' Queue of Verbal Orders

For organizations who wish to have verbal orders go to a queue prior to them being issued a facility setting in the OrderConnect Admin Tool allows this. An organization can decide if they want:

- no verbal orders going to the queue (this is the default);
- all verbal orders going to the queue;
- only verbal orders for controlled substances going to the queue.

The organization's system administrator can adjust the setting for this in the OC Admin Tool, Options tab. [As a note, when organizations go through Netsmart's implementation of EPCS, the DEA mandates that at a minimum, all verbal orders for controlled substances go to the Prescribers' Queue.]

Example of How the Queue Works: Creating a Verbal Order for a Controlled Substance

Prescription Agent:

If a prescriber agent creates a verbal order for a controlled substance she can proceed as usual through the application. However, she will notice on the Order Confirmation screen that there are not any output options for the prescription. Rather, she will see the word "Pending."

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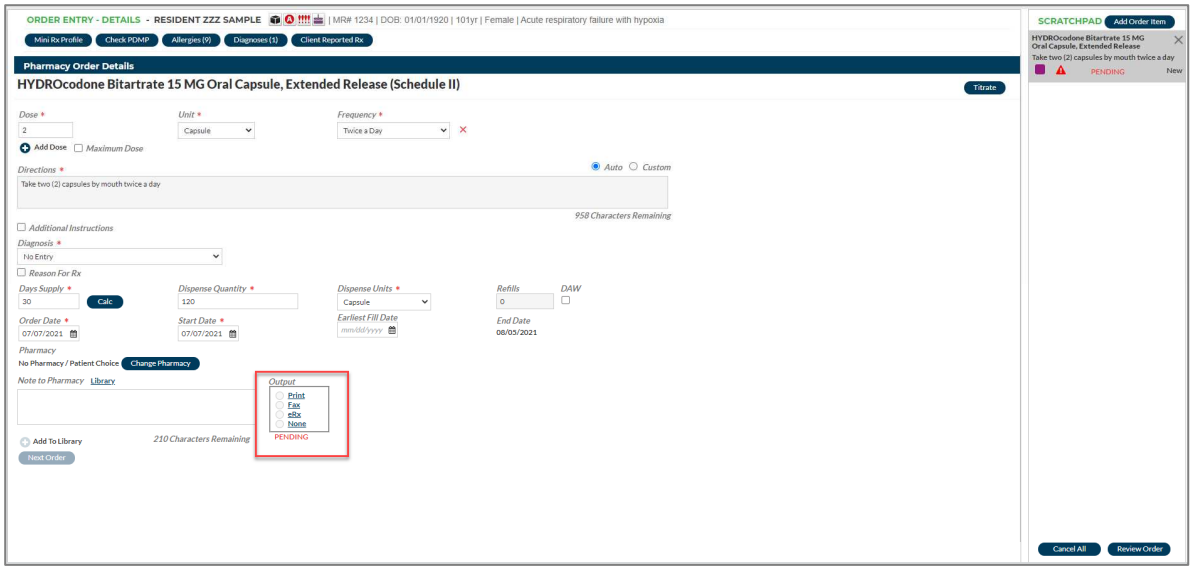
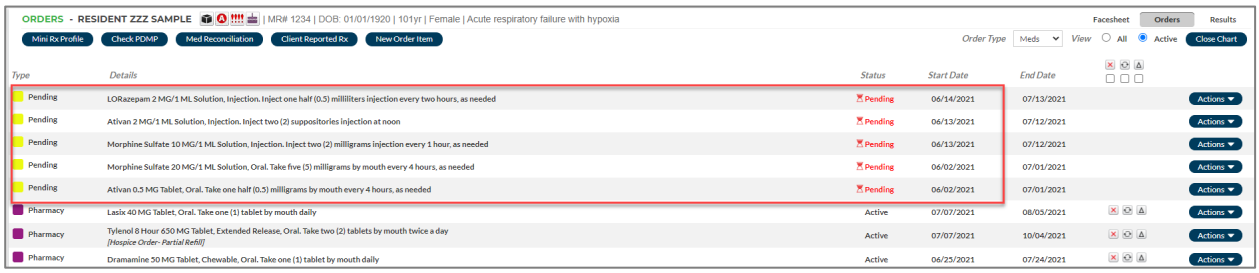


- After the prescriber agent clicks the “Accept” button, the prescription will go into a Pending status until the prescriber “signs” it. It will show as “Pending” on the Orders screen and be labeled as such.



- In myUnity, pending medications will have an asterisk* next to the name of the medication order until approved by the provider.

Prescriber: Retrieving Verbal Orders for Controlled Substance Prescriptions

If logged in as a provider inside of myUnity, the provider can access his/her queue from their home screen of the application. The Docs/Orders to Sign/Review widget will be a Home Widget on their Home Screen of myUnity.

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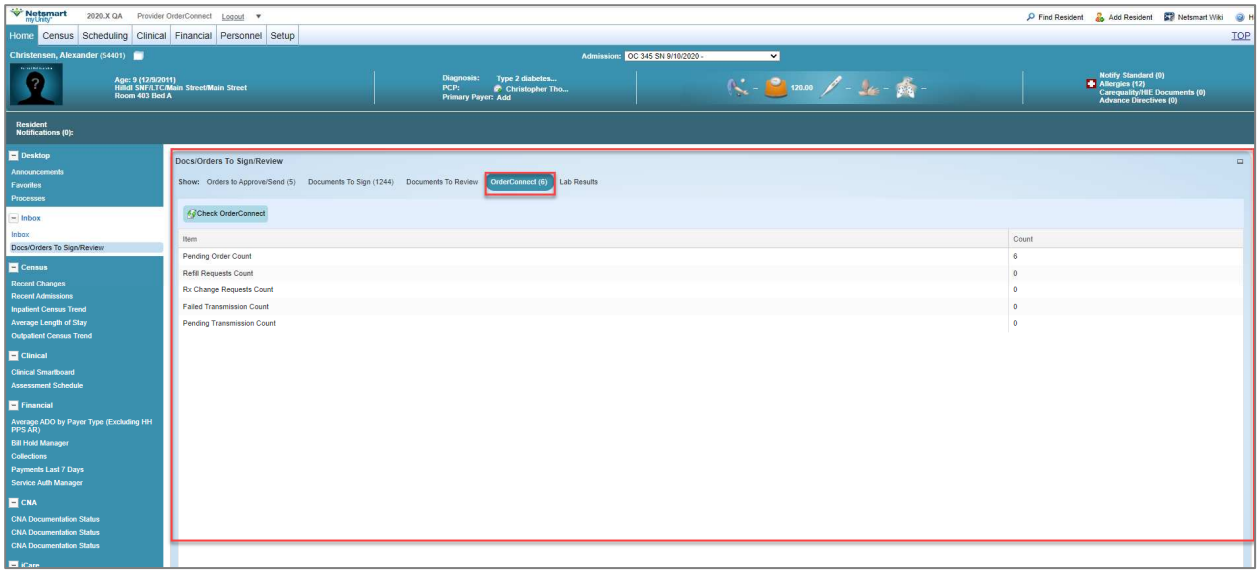
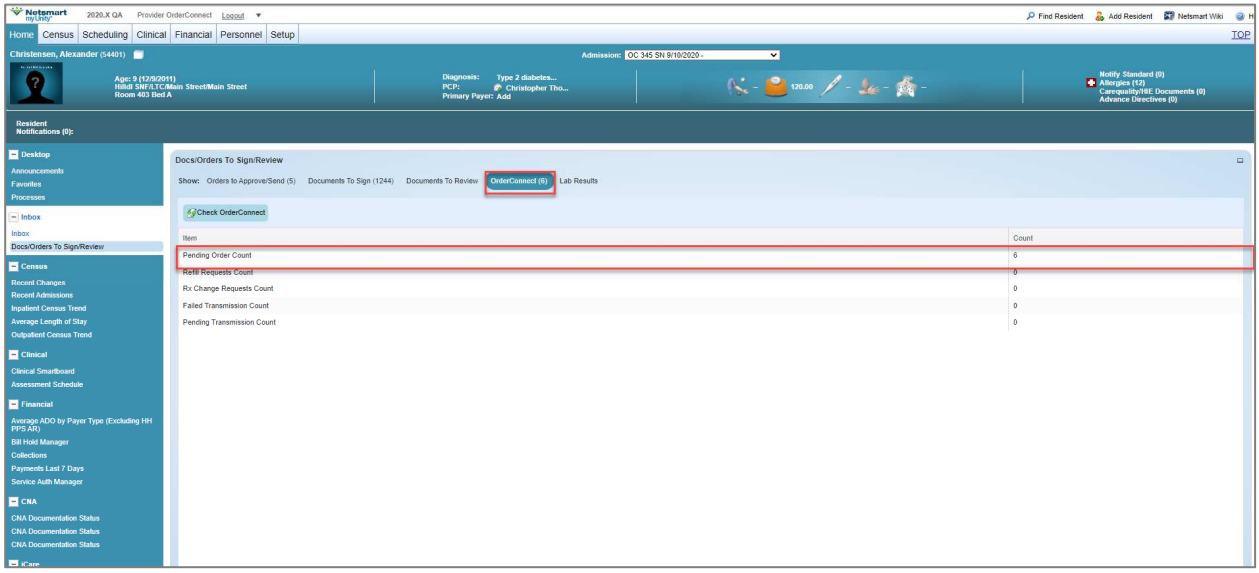


- The provider can access and SSO into OC-NX from myUnity by selecting **Pending Order Count** and this will launch OC-NX in another tab. Once logged into OC-NX, the provider can see their queue count.



- Providers can also access OC-NX with SSO from back office. Clinical-Actions-Orders-OrderConnect Prescriber Desktop. From here, the provider can select it and SSO into OC-NX.

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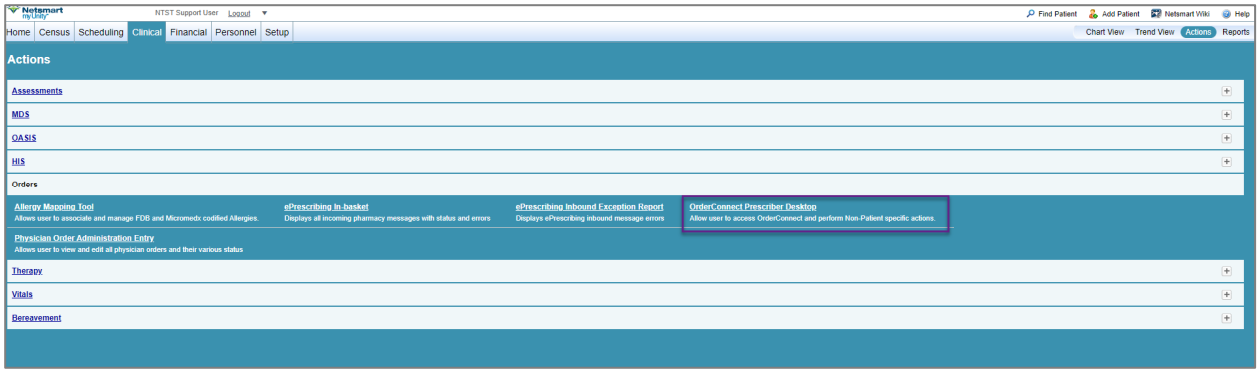
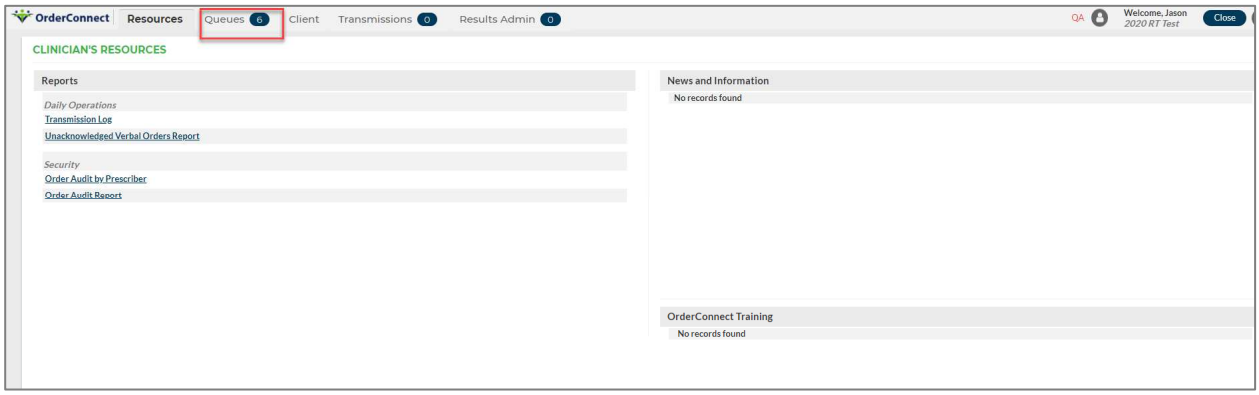


Prescriber: Signing Verbal Orders for Controlled Substance Prescriptions

After a prescription has been created by a prescriber agent it will stay in a pending status until the prescriber 'signs' it. There will be an indication of how many verbal orders a prescriber has in his queue at the top of the screens in OrderConnect-NX and on the Prescribers Desktop screen. It does not matter which patient record a prescriber is in, the number reflected at the top of the screen indicates the total number of verbal orders in the prescriber's queue across all his patients.



- When the prescriber clicks the Queue tab they will be taken to their verbal order queue. This is the same place where they'll see any electronic refill requests that have come in. (if they have elected to use that functionality).

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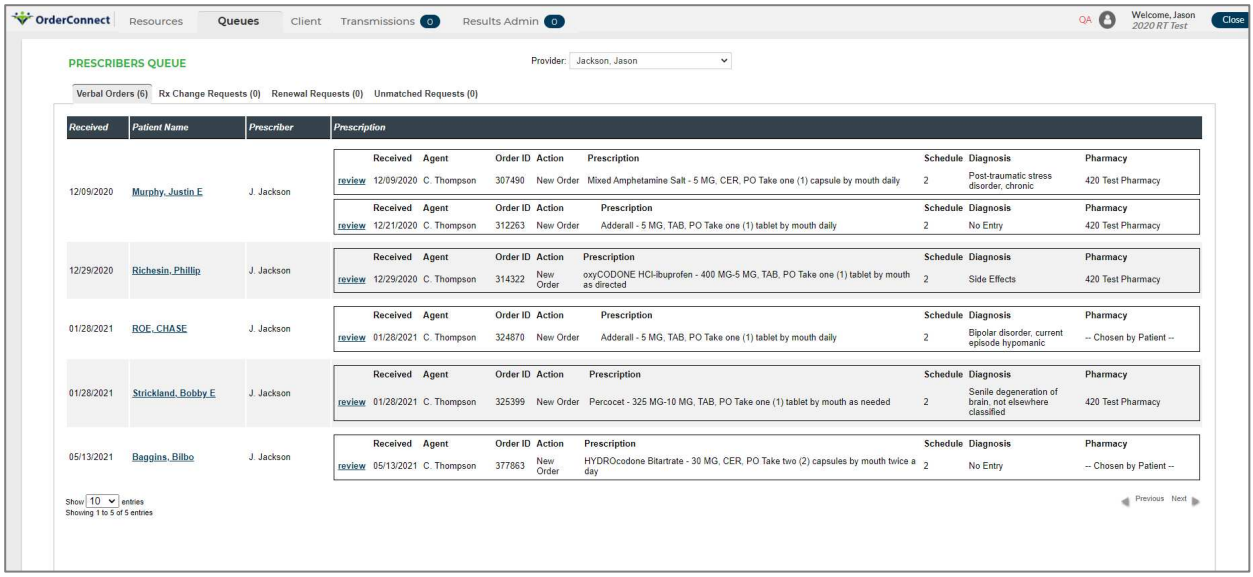
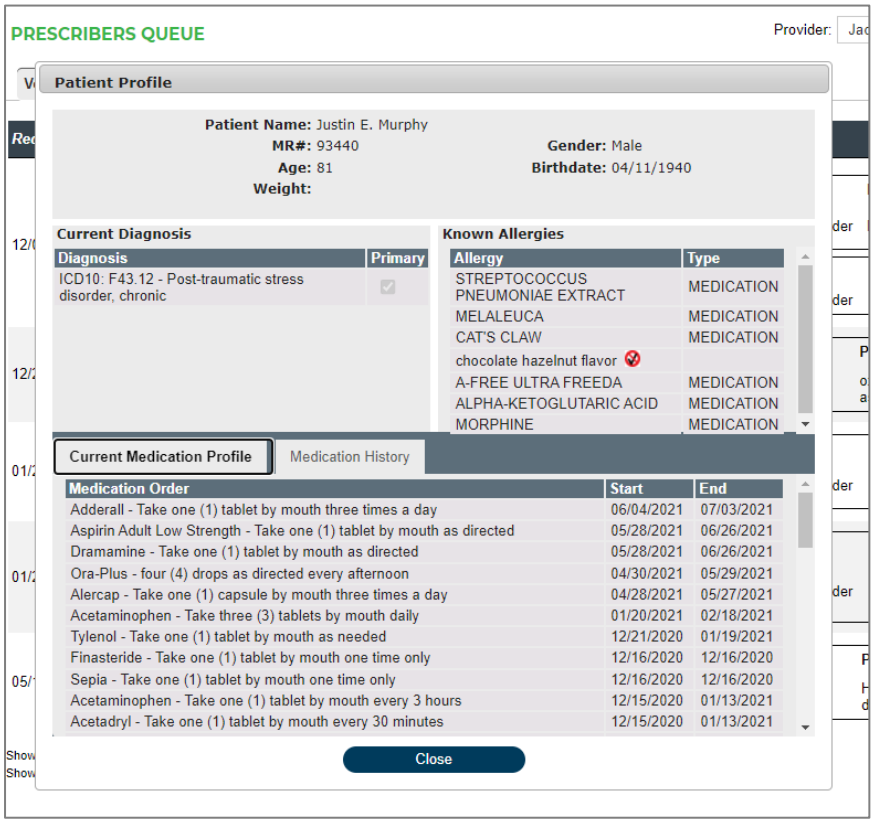


- If the prescriber wants to review the patient's current or historical medications, or if she wants to review the patient's allergies or diagnoses, click on the patient's name on the left side of the screen and a box will open up displaying the information.



- To approve or deny the verbal order, the prescriber clicks on the review button.

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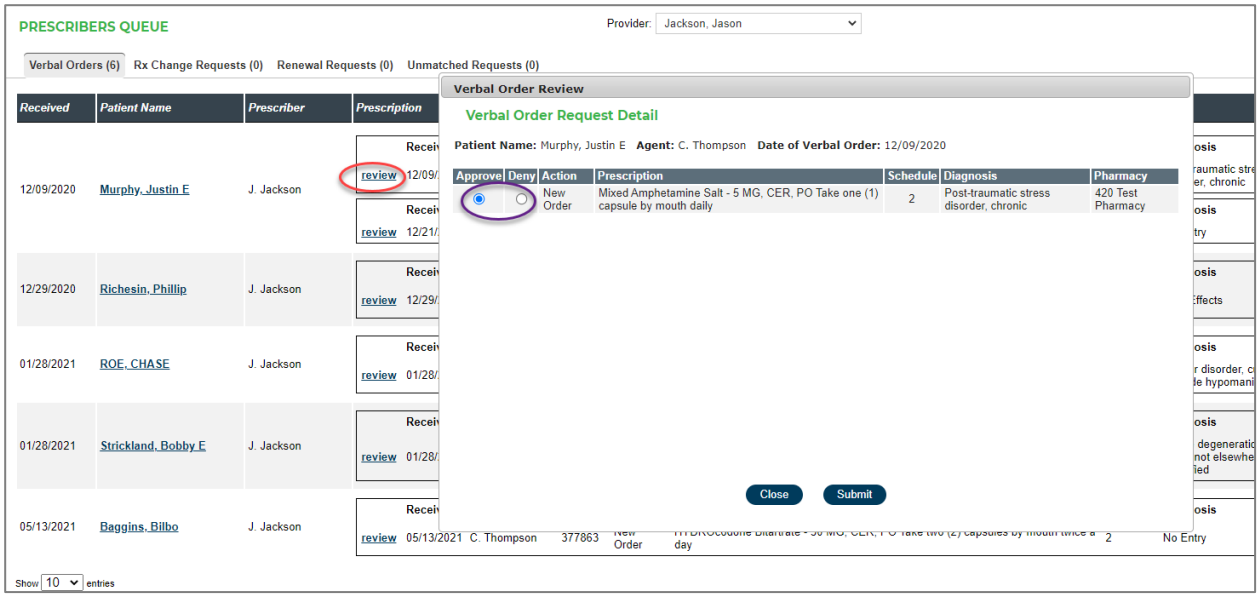
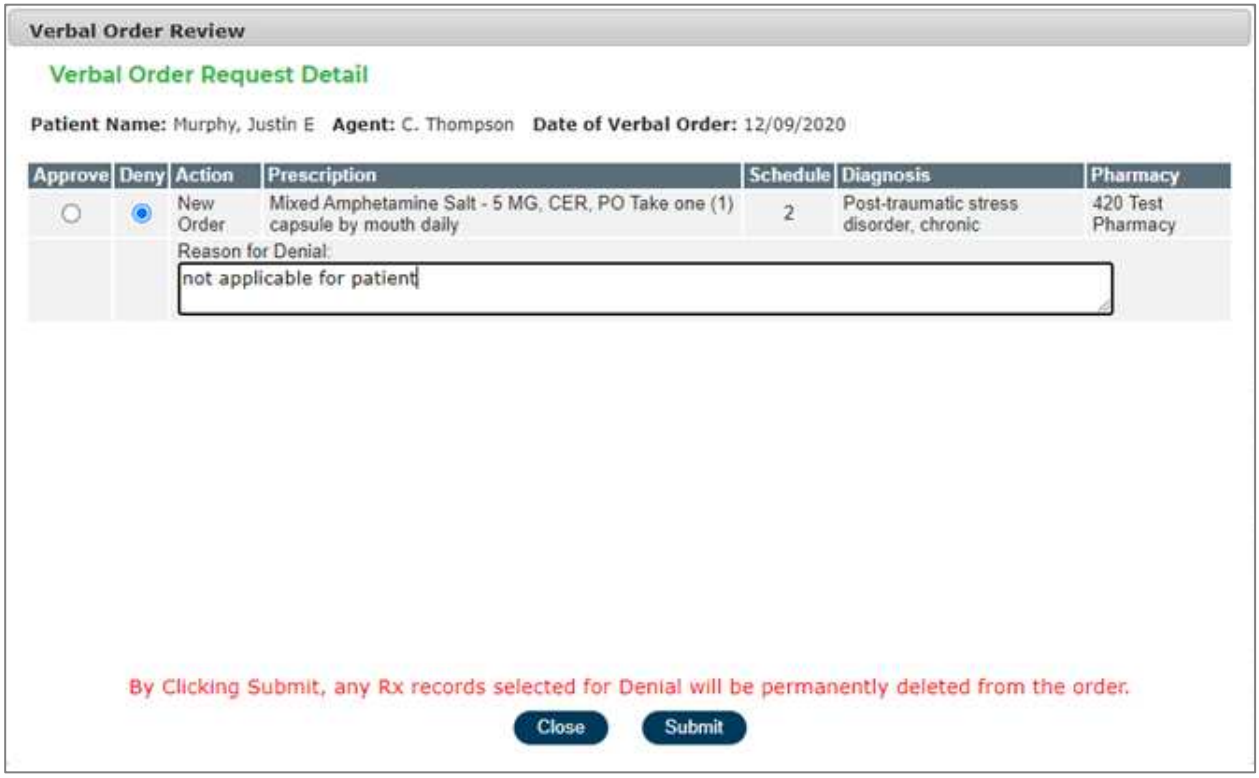


- The prescriber can then choose to approve or deny the verbal order. If the prescriber denies it, the reason for denial will populate to document the denial.



- If the prescriber approves of the order, it will require her to review the order prior to sending it to the pharmacy.

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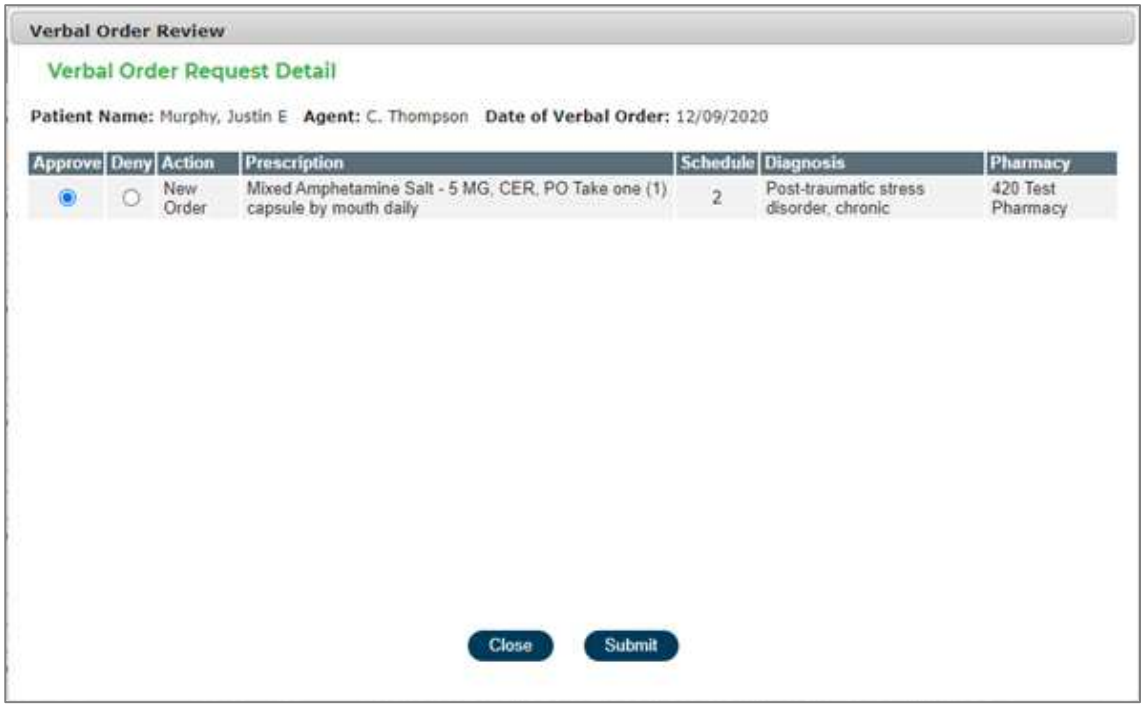

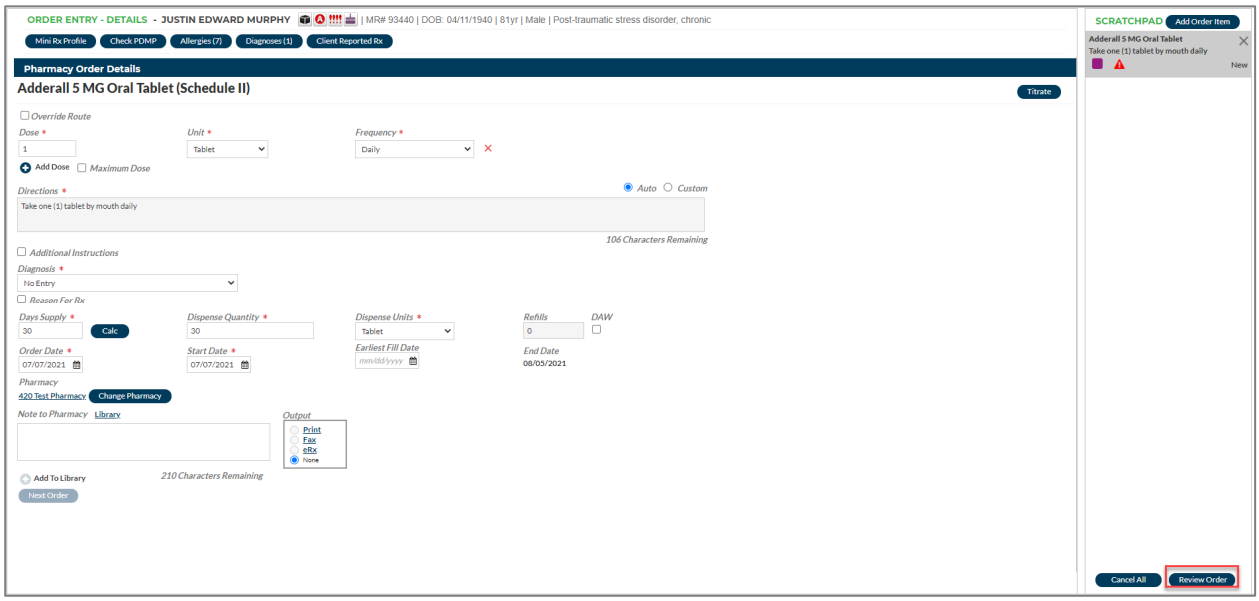

- The e-Rx option will be the default output type if working in a production environment. In UAT environments, the default output type will be none. After reviewing the order and confirming the pharmacy information the prescriber will **Accept** the order.

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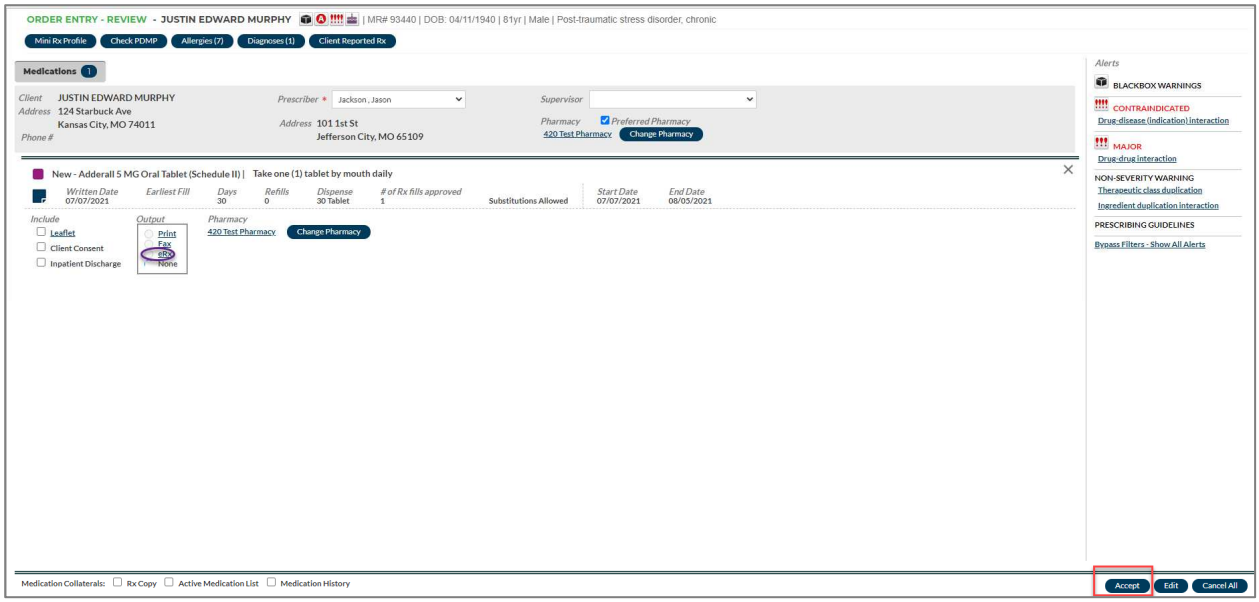
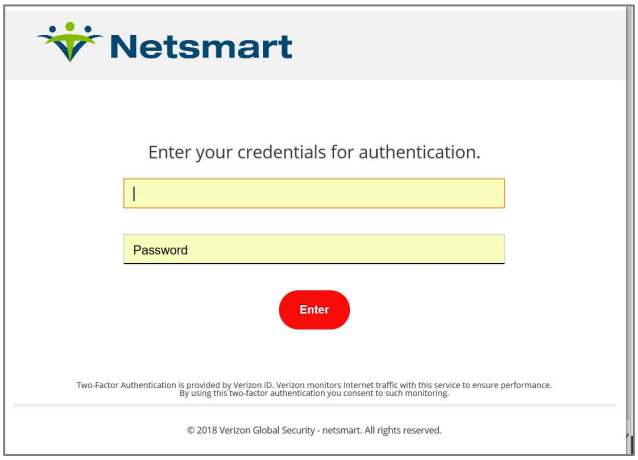
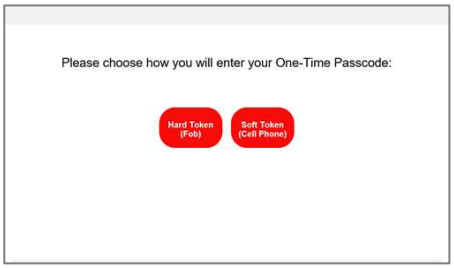


- When the prescriber approves of the Order, she will be required to enter her OrderConnect-NX Login and then use her hard or soft token if it is a controlled medication.



- The token will create a code that the prescriber enters as the ‘one-time passcode’ when sending out the electronic prescription.



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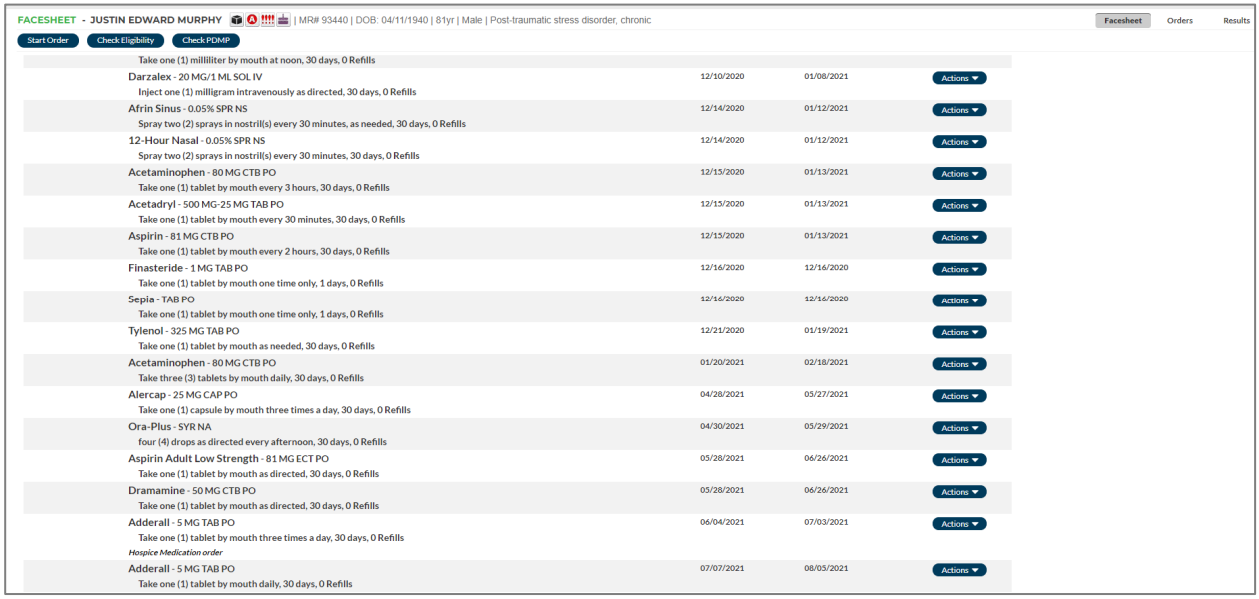
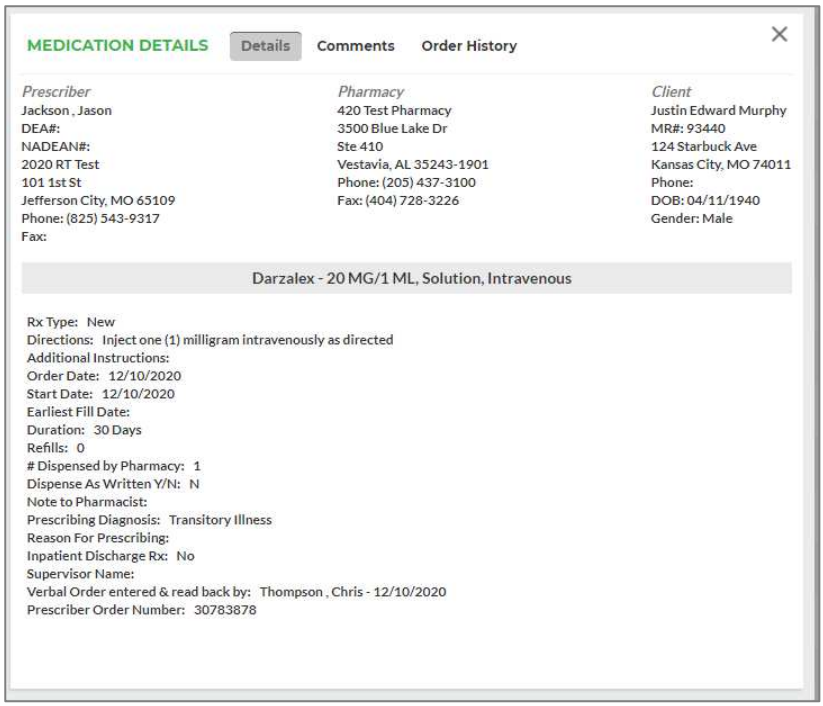
- After the prescriber has finalized the prescription the medication will now show up on the Orders screen as an active medication. The asterisk (*) will also fall off on the myUnity medication profile.



- If a user clicks on the name of the medication, a Medication Details box will indicate it was a verbal order and that it was acknowledged by the prescriber.



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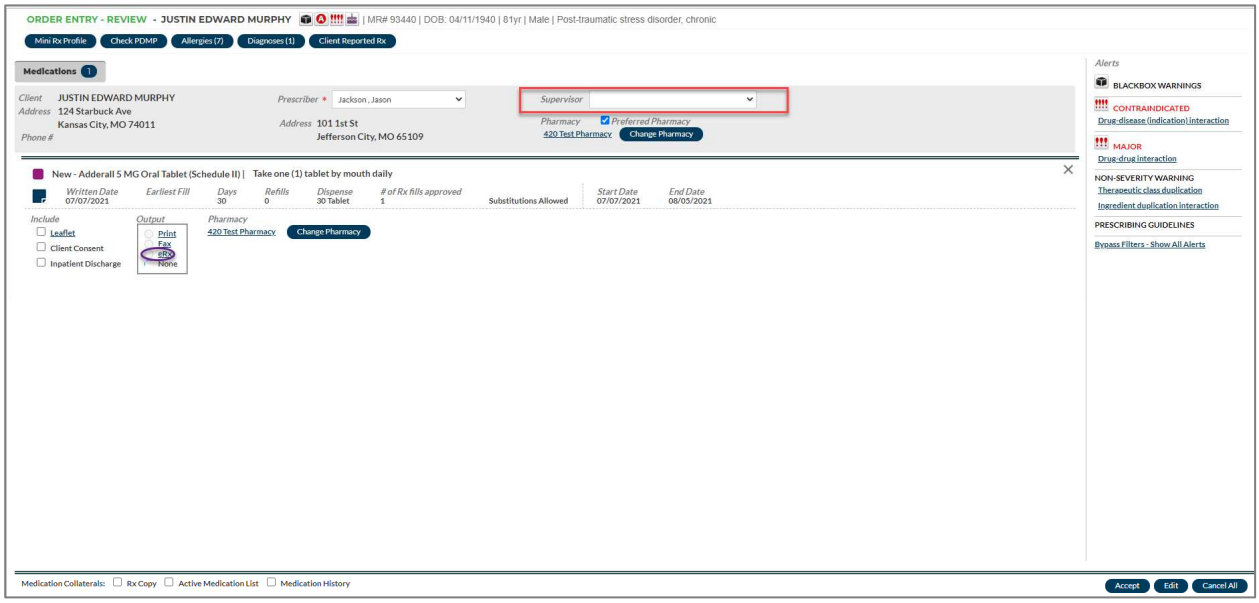
“Supervised By” Field (Supervised Prescribers)

For non-physician prescribers who are required by their state to be supervised by other prescribers there is a new field in the provider registration screens that allows a non-physician prescriber to indicate they are supervised. This new field is found in the OrderConnect Providers Tool and in a provider’s profile in the system administrator’s OrderConnect Admin Tool. When the checkbox is checked, anytime a non-physician prescriber who is supervised creates a prescription, he/she can choose the name of the supervisor on the order review screen. Once a supervisor’s name is chosen it will remain the same unless changed. The prescriber’s name and supervisor’s name will appear on prescriptions and eRx transactions.



Prescriber Events from Existing Active Orders

Once medications have been ordered and appear on the Orders screen, Reorders, Discontinues and Changes make the ordering process quicker.

- A user may reorder, change, discontinue and add new medications all with a single pass through the application. There’s no limit to the number of prescribing events that can be contained in a single order.

Steps	Actions
1) From the Orders tab, click on the red X to the right of the current medication order to indicate the medication will be discontinued.	Once confirmed this will allow the user to discontinue the selected medication
2) From the Orders Tab, click on the circular arrows to the right of the current medication order to indicate the medication will be reordered.	Once taken to the Custom Orders screen, the user will be allowed to modify Order Date, Start Date, etc…

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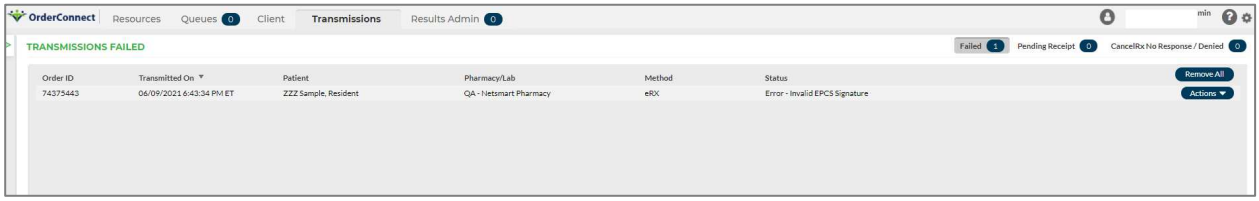
3) From the Orders Tab screen, click on the delta symbol to the right of the current medication order to indicate the medication order will be changed.	Will take user to the Custom Orders screen to change the details of the selected prescription
4) From the Orders Tab, click on the New Order Item at the top of the screen to indicate a new medication order will be added.	Will take the user through all pages of a prescribing event.

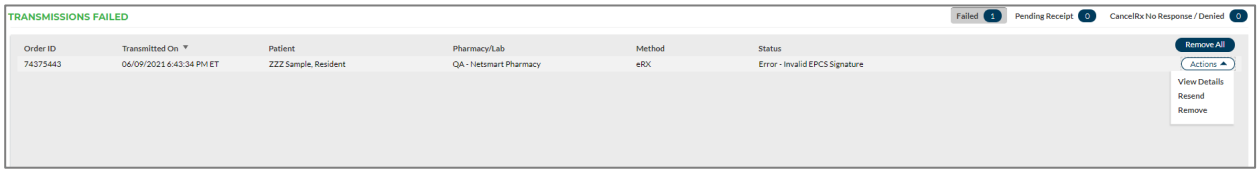
Transmission Status Indicator

If a transmission is in a pending or failed status for the user currently logged in, the user will see a Transmission Status indicator at the top of the Orders screen of all records. Clicking on this link provides the user the opportunity to review all transmissions that may have failed or have not yet completed and may allow the user to resend any prescriptions that have a 'failed' status directly from within the option.

- To obtain more detail regarding which transmissions are pending or failed, just click on the button in the upper portion of the screen.



- When you click on the Transmission Status option a new screen will appear and will show you the status of the transmission. If the transmissions show a failed status, then the user can click on Actions dropdown and the resend option may appear on the right side of the screen. If the transmission is in pending status, the resend option will not appear.



Resources Tab

The Resources tab allows the clinician to view the Transmission Log and the Order Audit by Prescriber Report.

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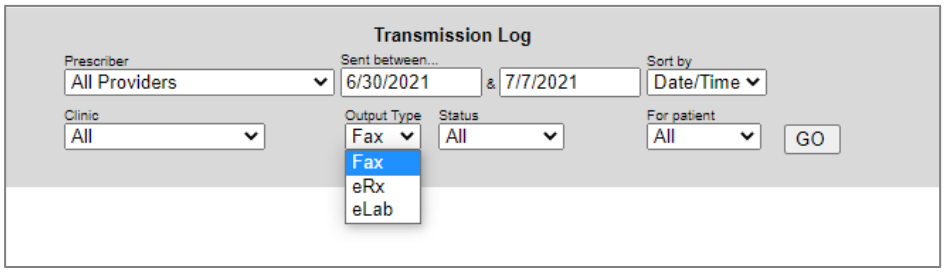
- The Transmission Log is used to see all the orders that were sent either by Fax or e-RX.



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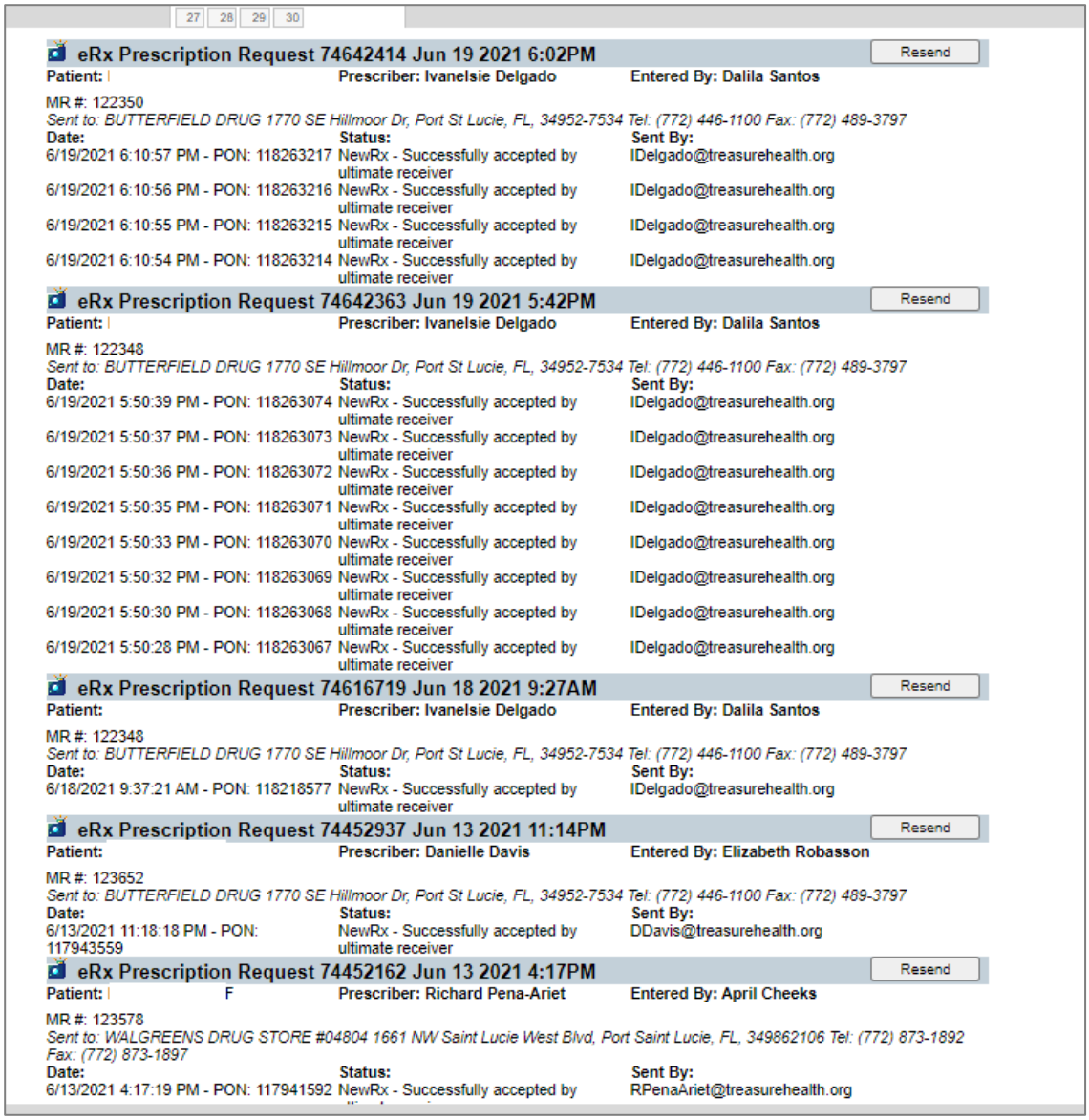

- The Order Audit by Prescriber report will create a report to show the level of activity that is being performed by all Prescribers and all Agents. You can filter this by Agencies, specific users, order types, and the dates of the order.

Close Chart

Once a patient's prescribing event has been completed and the user has returned to the Current Medication Profile, there will be two options from which to choose in order to leave the current record. The Close Chart and Log Off options are located at the top right-hand side of the screen.

- Selecting Close Chart will close the chart for the current patient. This will take the user back to the Prescriber's Desktop to select a new patient record. For users of single sign on (myUnity) the close chart option, return the user to myUnity.

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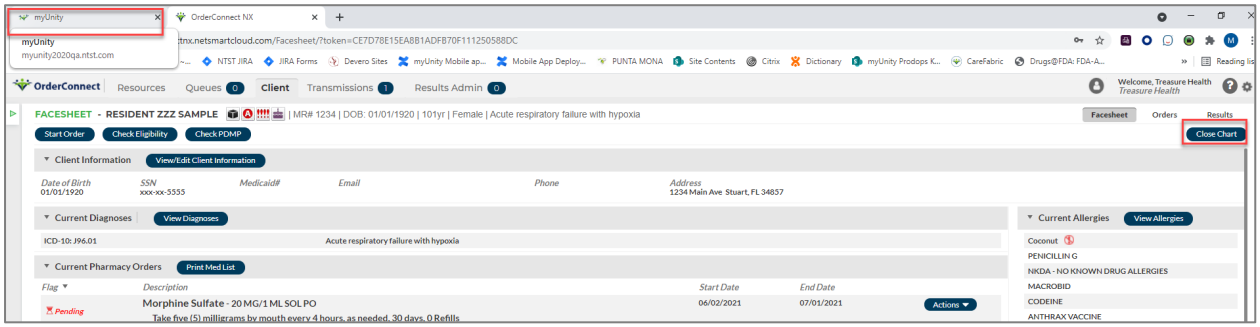
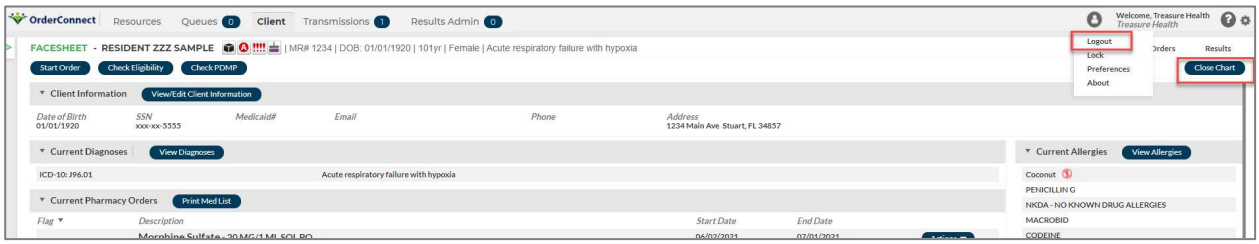
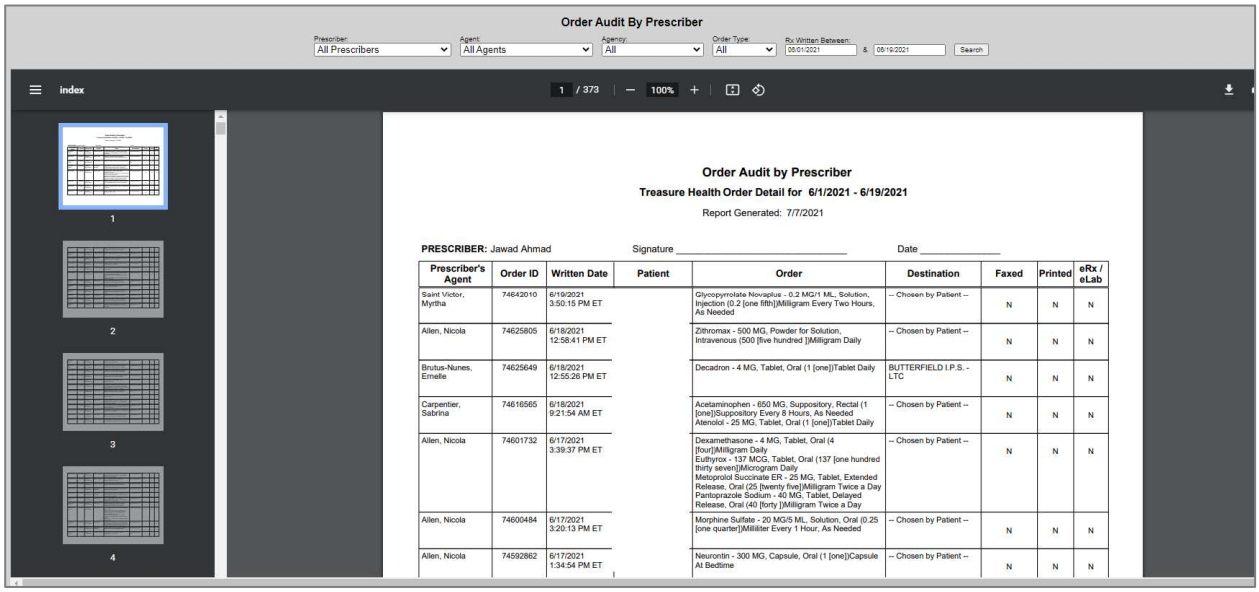


- Selecting Log Off will return the user to the OrderConnect login screen. For users of Single Sign On (myUnity) the log off option is not available.





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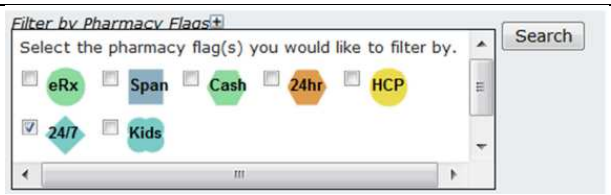
Appendix A: Information about eRX Transactions

The following items are checked by the system before allowing the eRx option to display on the Order Confirmation Page:

- **Date of birth** must be present in the record
- The **Prescriber** must be Surescripts-enabled and have a DEA number in their OrderConnect registration. An SPI (unique identifier) will be visible in the provider's registration.
- The **Pharmacy** must be Surescripts-enabled. The pharmacy must have been selected from the "OrderConnect Pharmacies" list when being added on the Pharmacies tab in the admin tool. CUSTOM PHARMACIES ARE INELIGIBLE FOR THE eRX OUTPUT OPTION.
- The **Medication Schedule** for all medication contained in the order. No medications that are schedules II-V can be sent via eRx unless the prescriber has completed the EPCS certification process. This is a separate implementation process. Please contact your System Administrator or Netsmart representative for details on this process.
- If the eRx output option is not available a flyover will alert users as to the reason eRx may not be available. Simply hold the cursor over the eRx option for details.

Searching for Pharmacy Flags in the Main Application (Optional Feature)

If a user wishes to locate a pharmacy with a specific flag, he can do so on either the Order Confirmation screen and/or the Patient Demographic screen.

Steps	Actions
Click the Change button next to the Pharmacy field	Opens up the pharmacy screen
Click the link labeled "Filer by Pharmacy Flags"	
Indicate the flag or flags for which you are searching and click the Search button	
Returns results meeting criteria to select from	

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Appendix B: Glossary

User Type

OrderConnect has the following user types available on the Prescriber Registration Page. These user type designations do not display on any documentation output from OrderConnect. They are used for the purposes of determining user permissions only. The permissions associated with each user type are intended to address the legal abilities of the user types in most states and do not imply equal permissions in all states. Please refer your state's individual permissions when assigning a user type.

Type	Description
Admin (Supervisory):	Ability to merge/delete records, strike items from a client chart, and update certain pieces of client data that other users would not.
Data Conversion (Prescriber Agent)	This user can enter orders on behalf of a Prescriber but CANNOT print a legal copy of the script. All orders generated will indicate they are a verbal order. This type of user account is best for initial prescription data entry and ongoing data entry where the user does not have a need for a legal copy of the prescription.
Data Entry (Prescriber Agent)	This user can enter orders on behalf of a Prescriber and CAN print a legal copy of the script. All orders generated will indicate they are a verbal order. This user type is best used for a generic type of user that may have to generate an original legal copy of a prescription.
Dental Assistant (Prescriber Agent)	This user can enter orders on behalf of a Prescriber user type and CAN print a legal copy of the script. All orders generate will indicate it was a verbal order.
Dental Hygienist (Non-Prescribing User)	The user can enter all information into the system with the exception of having the ability to enter a medication order
Dentist (Prescriber)	Able to generate an order under their own DEA
DO – Other (Prescriber)	Able to generate an order under their own DEA
DO – Psychiatrist (Prescriber)	Able to generate an order under their own DEA
Guest	This user can enter all information into the system with the exception of having the ability to enter a medication order.

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MD – Other (Prescriber)	Able to generate an order under their own DEA
MD – Psychiatrist (Prescriber)	Able to generate an order under their own DEA
MP-Medical Psychologist (Prescriber)	Psychologist (Currently in the state of Louisiana only) who is able to legally prescribe under their own DEA
Non-Physician Prescriber – Clinical Nurse Practitioner (Prescriber)	Able to generate an order under their own DEA
Non-Physician Prescriber – Nurse Practitioner (Prescriber)	Able to generate an order under their own DEA
Non-Physician Prescriber: Other (Prescriber)	Able to generate an order under their own DEA
Non-Physician Prescriber: Pharm D (Prescriber)	Able to generate an order under their own DEA
Non-Physician Prescriber: Physician Assistant (Prescriber)	Able to generate an order under their own DEA
Non-Prescribing User	This user can enter all information into the system with the exception of having the ability to enter a medication order.
Nurse: RN (Prescriber Agent)	This user can enter orders on behalf of a Prescriber user type. All orders generate will indicate it was a verbal order.
Nursing: Other (Prescriber Agent)	This user can enter orders on behalf of a Prescriber user type. All orders generate will indicate it was a verbal order.
Pharmacist	This user can enter all information into the system with the exception of having the ability to enter a medication order.
System Administrator (Prescriber Agent)	This user can enter orders on behalf of a Prescriber user type. All orders generate will indicate it was a verbal order.

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