

NC HEALTHCONNEX CLINICAL PORTAL

Controlled Substance Reporting System Quick Reference Guide



NORTH CAROLINA
HEALTH INFORMATION EXCHANGE AUTHORITY (NC HIEA)

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Overview

The scope of this document is a high-level overview of the workflow between the NC HealthConnex clinical portal and [the NC Controlled Substances Reporting System \(CSRS\)](#) managed by the N.C. Department of Health and Human Services Division of Mental Health and hosted by Appriss Health. CSRS enables NC HealthConnex users to view controlled substance reports through the NC HealthConnex clinical portal.

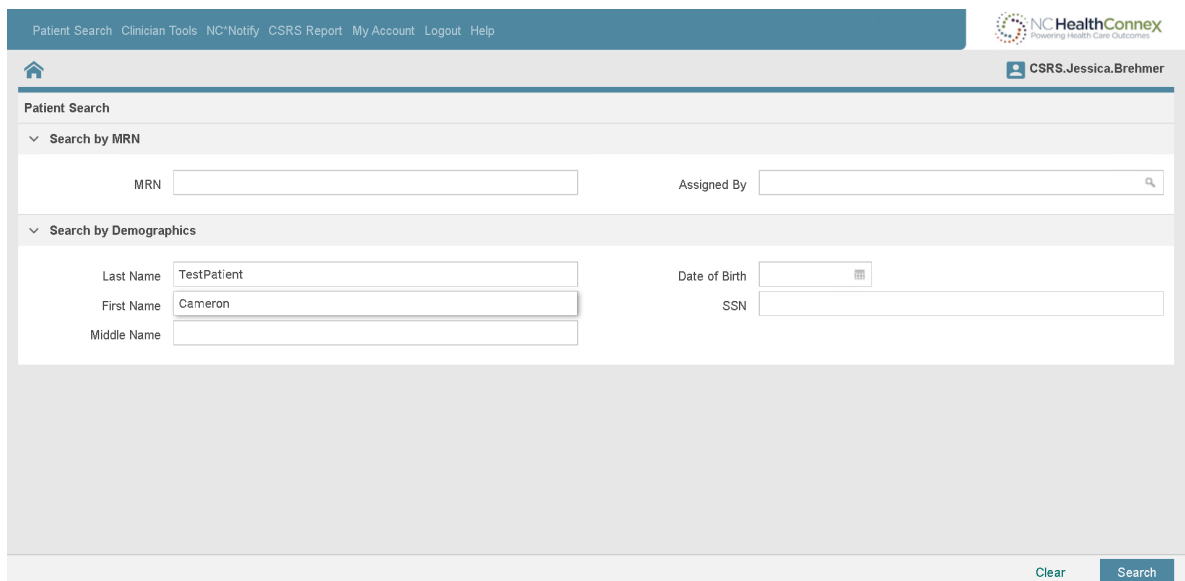
User Experience

This integration allows NC HealthConnex clinical portal users to access CSRS reports within the clinical viewer. Portal users are able to access CSRS reports for patients within the clinical viewer.

Workflow

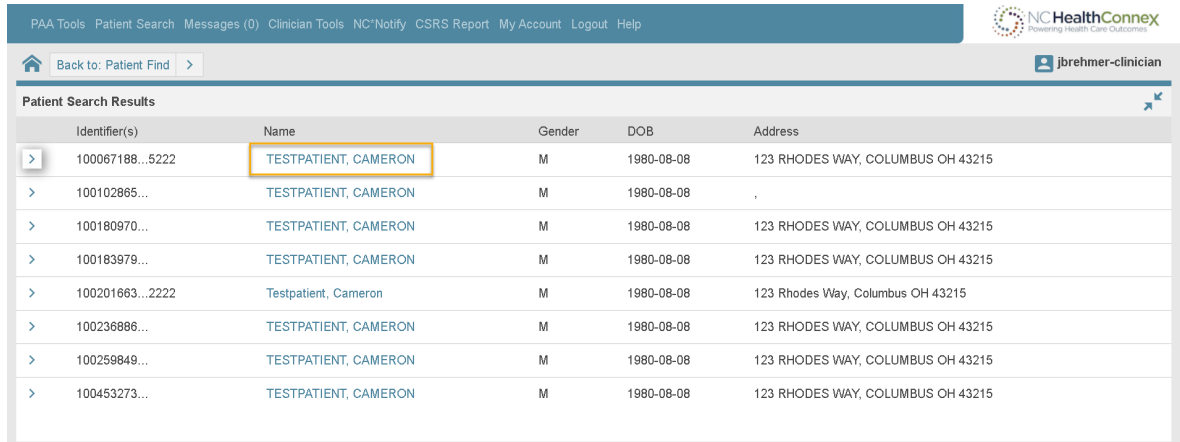
Accessing Patients Through Their Clinical Record

1. A portal user with a CSRS role searches for a patient and requests to view a patient record. As part of the patient search, a secondary request is automatically sent to search the CSRS system.



The screenshot shows the 'Patient Search' interface in the NC HealthConnex clinical portal. At the top, there is a navigation bar with links for 'Patient Search', 'Clinician Tools', 'NC Notify', 'CSRS Report', 'My Account', 'Logout', and 'Help'. The user's name, 'CSRS.Jessica.Brehmer', is displayed in the top right corner. The main search area is titled 'Patient Search' and contains two sections: 'Search by MRN' and 'Search by Demographics'. The 'Search by MRN' section has an 'MRN' input field and an 'Assigned By' dropdown menu. The 'Search by Demographics' section has input fields for 'Last Name' (TestPatient), 'First Name' (Cameron), 'Middle Name', 'Date of Birth', and 'SSN'. At the bottom right, there are 'Clear' and 'Search' buttons.

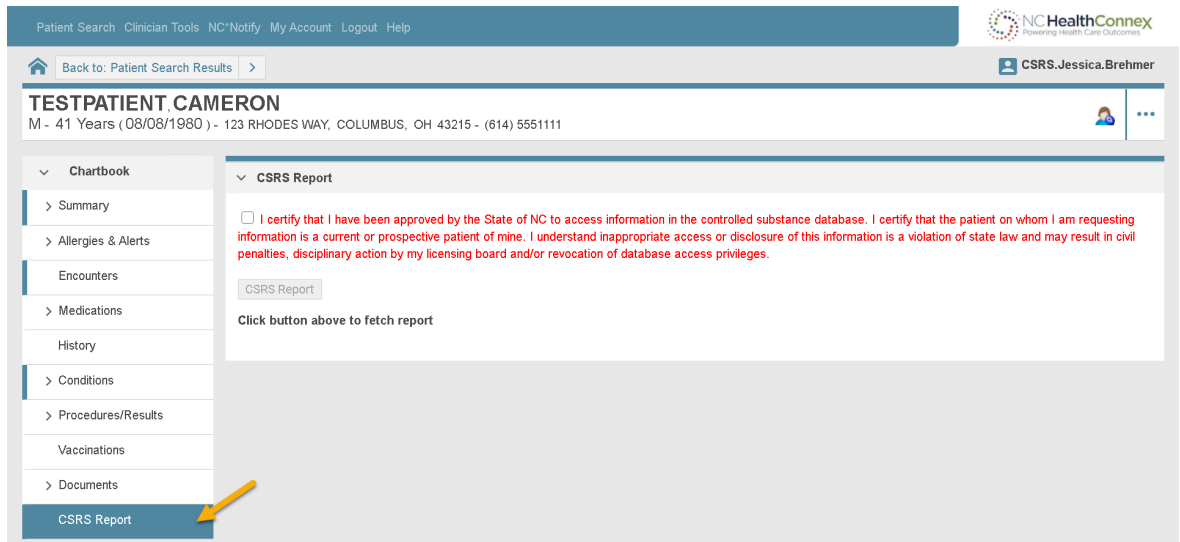
2. The user selects a patient to view the patient record.



The screenshot shows the 'Patient Search Results' page in the NC HealthConnex system. The page header includes navigation links: PAA Tools, Patient Search, Messages (0), Clinician Tools, NC Notify, CSRS Report, My Account, Logout, and Help. A breadcrumb trail shows 'Back to: Patient Find'. The user is identified as 'jbrehmer-clinician'. The main content is a table of search results with columns for Identifier(s), Name, Gender, DOB, and Address. The first row is highlighted with a yellow box around the name 'TESTPATIENT, CAMERON'.

Identifier(s)	Name	Gender	DOB	Address
100067188...5222	TESTPATIENT, CAMERON	M	1980-08-08	123 RHODES WAY, COLUMBUS OH 43215
100102865...	TESTPATIENT, CAMERON	M	1980-08-08	,
100180970...	TESTPATIENT, CAMERON	M	1980-08-08	123 RHODES WAY, COLUMBUS OH 43215
100183979...	TESTPATIENT, CAMERON	M	1980-08-08	123 RHODES WAY, COLUMBUS OH 43215
100201663...2222	Testpatient, Cameron	M	1980-08-08	123 Rhodes Way, Columbus OH 43215
100236886...	TESTPATIENT, CAMERON	M	1980-08-08	123 RHODES WAY, COLUMBUS OH 43215
100259849...	TESTPATIENT, CAMERON	M	1980-08-08	123 RHODES WAY, COLUMBUS OH 43215
100453273...	TESTPATIENT, CAMERON	M	1980-08-08	123 RHODES WAY, COLUMBUS OH 43215

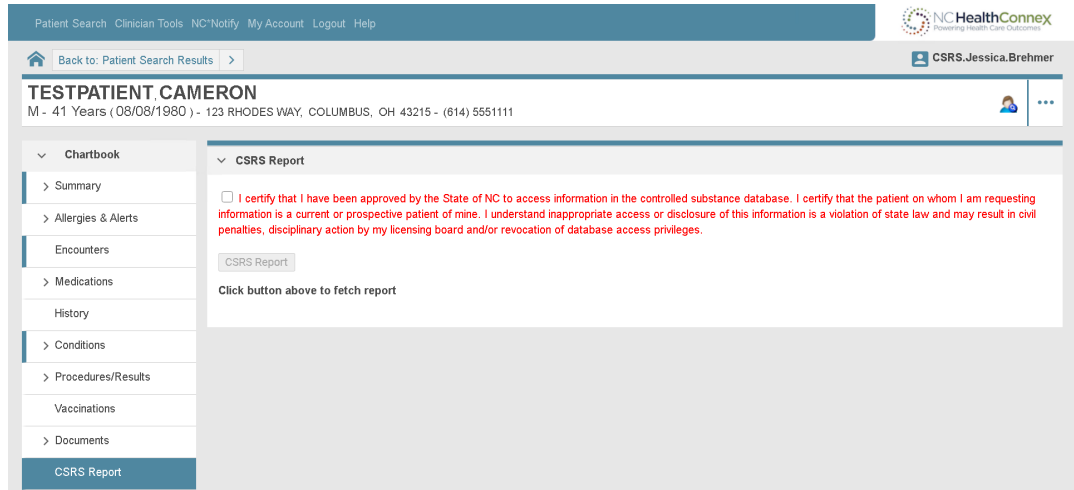
3. From the Patient View screen, the user navigates to the “CSRS Report” tab.



The screenshot shows the 'Patient View' screen for 'TESTPATIENT CAMERON'. The page header includes navigation links: Patient Search, Clinician Tools, NC Notify, My Account, Logout, and Help. A breadcrumb trail shows 'Back to: Patient Search Results'. The user is identified as 'CSRS.Jessica.Brehmer'. The patient information is: M - 41 Years (08/08/1980) - 123 RHODES WAY, COLUMBUS, OH 43215 - (614) 5551111. The left sidebar contains a 'Chartbook' menu with options: Summary, Allergies & Alerts, Encounters, Medications, History, Conditions, Procedures/Results, Vaccinations, Documents, and CSRS Report. The 'CSRS Report' option is highlighted with a yellow arrow. The main content area shows the 'CSRS Report' section with a checkbox for a certification statement and a 'CSRS Report' button. Below the button is the text 'Click button above to fetch report'.

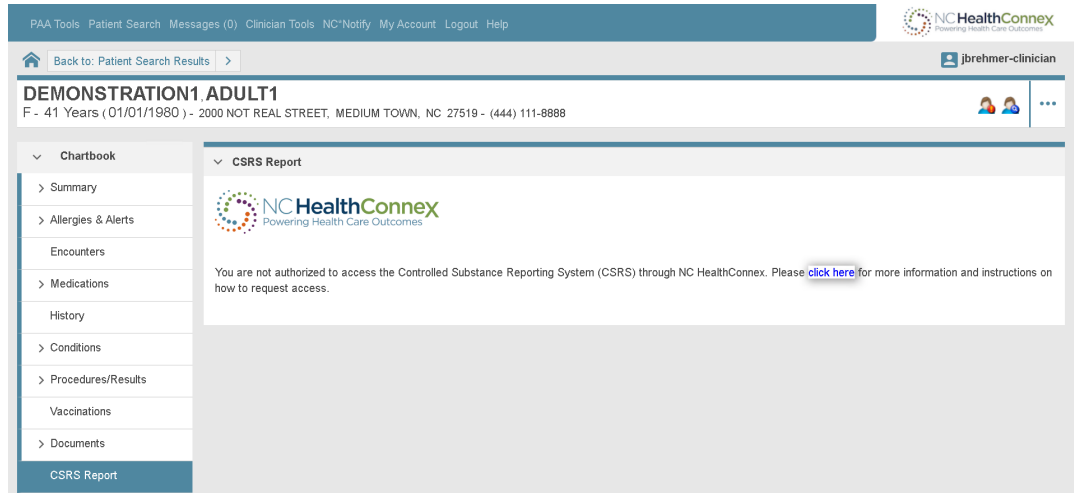
4. Once the user clicks the CSRS Report tab, they see one of the following screens:

- a. Access Granted



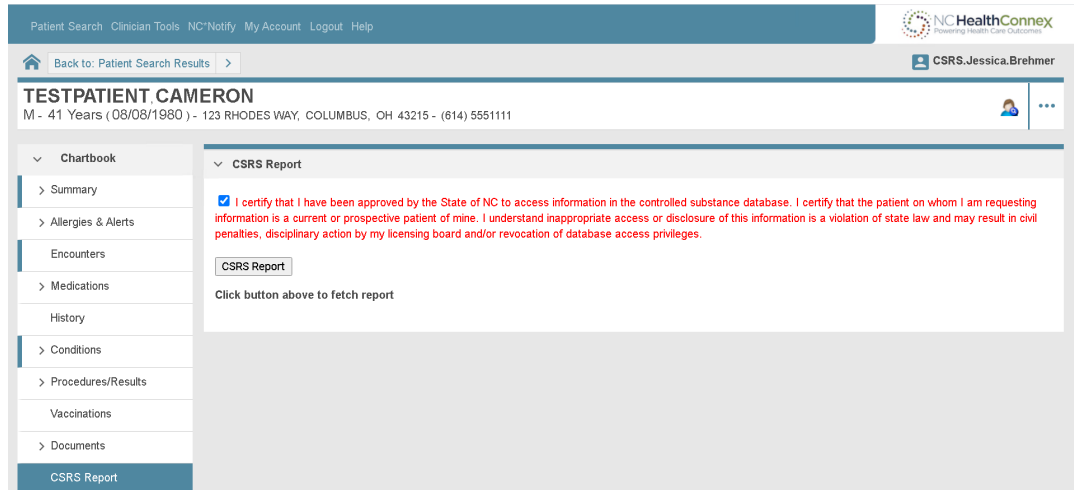
The screenshot shows the NC HealthConnex interface for a patient named TESTPATIENT CAMERON. The top navigation bar includes links for Patient Search, Clinician Tools, NC Notify, My Account, Logout, and Help. The patient's chartbook is visible on the left, with 'CSRS Report' selected. The main content area displays a red warning message: "I certify that I have been approved by the State of NC to access information in the controlled substance database. I certify that the patient on whom I am requesting information is a current or prospective patient of mine. I understand inappropriate access or disclosure of this information is a violation of state law and may result in civil penalties, disciplinary action by my licensing board and/or revocation of database access privileges." Below this message is a 'CSRS Report' button and a note: "Click button above to fetch report".

- b. Access Denied

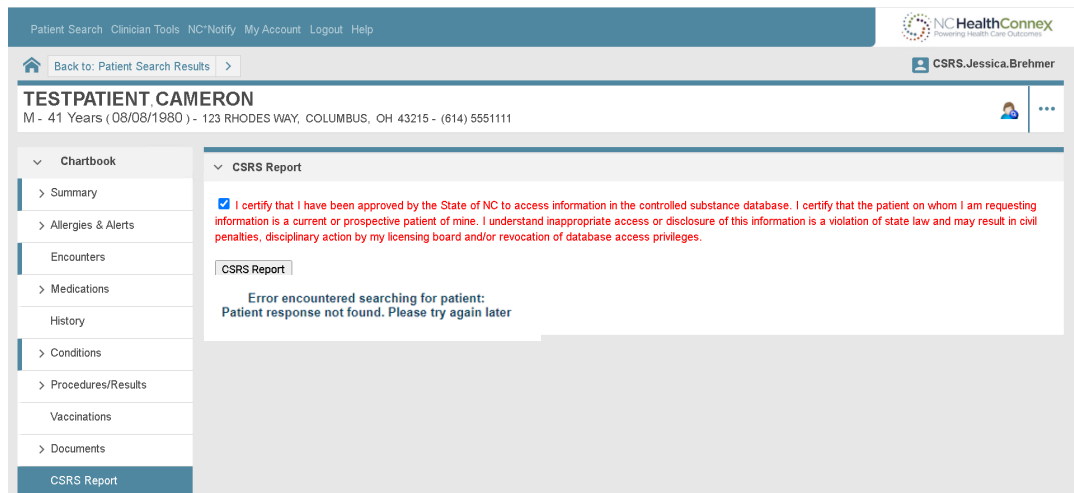


The screenshot shows the NC HealthConnex interface for a patient named DEMONSTRATION1 ADULT1. The top navigation bar includes links for PAA Tools, Patient Search, Messages (0), Clinician Tools, NC Notify, My Account, Logout, and Help. The patient's chartbook is visible on the left, with 'CSRS Report' selected. The main content area displays a message: "You are not authorized to access the Controlled Substance Reporting System (CSRS) through NC HealthConnex. Please [click here](#) for more information and instructions on how to request access."

5. To initiate the process of retrieving a CSRS Report, the user must:
 - a. Confirm that they want to access the CSRS Report by checking the consent box, which enable the CSRS Report buttons.
 - b. Click the CSRS Report button to fetch the report for this patient.

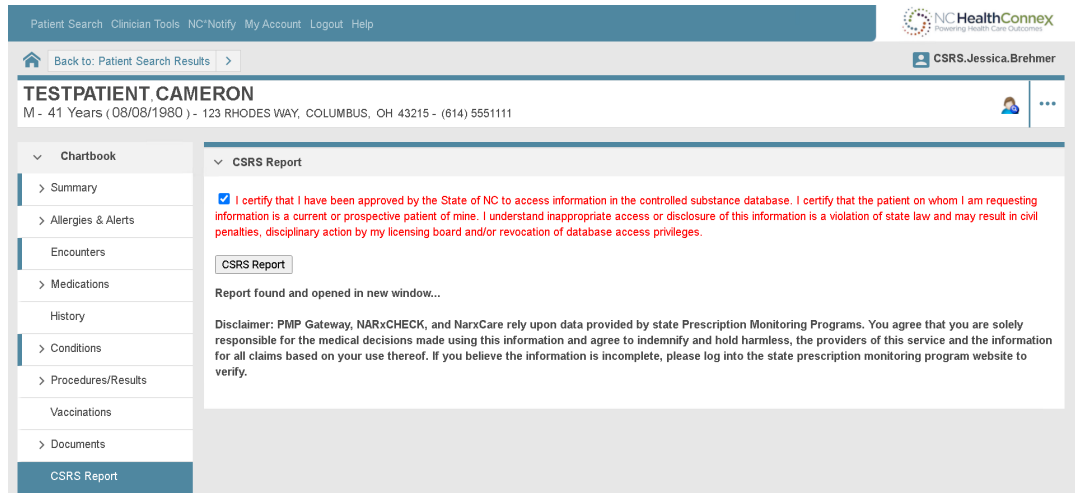


- c. If the CSRS Report search returns an error, it will display within the CSRS REPORT window. (See Appendix A for a list of errors.)



- d. If the CSRS Report request prefetch was successful, retrieval of the CSRS Report will be initiated.
 - e. If report retrieval returned an error in the response, it will display within the CSRS REPORT window. (See Appendix B.)

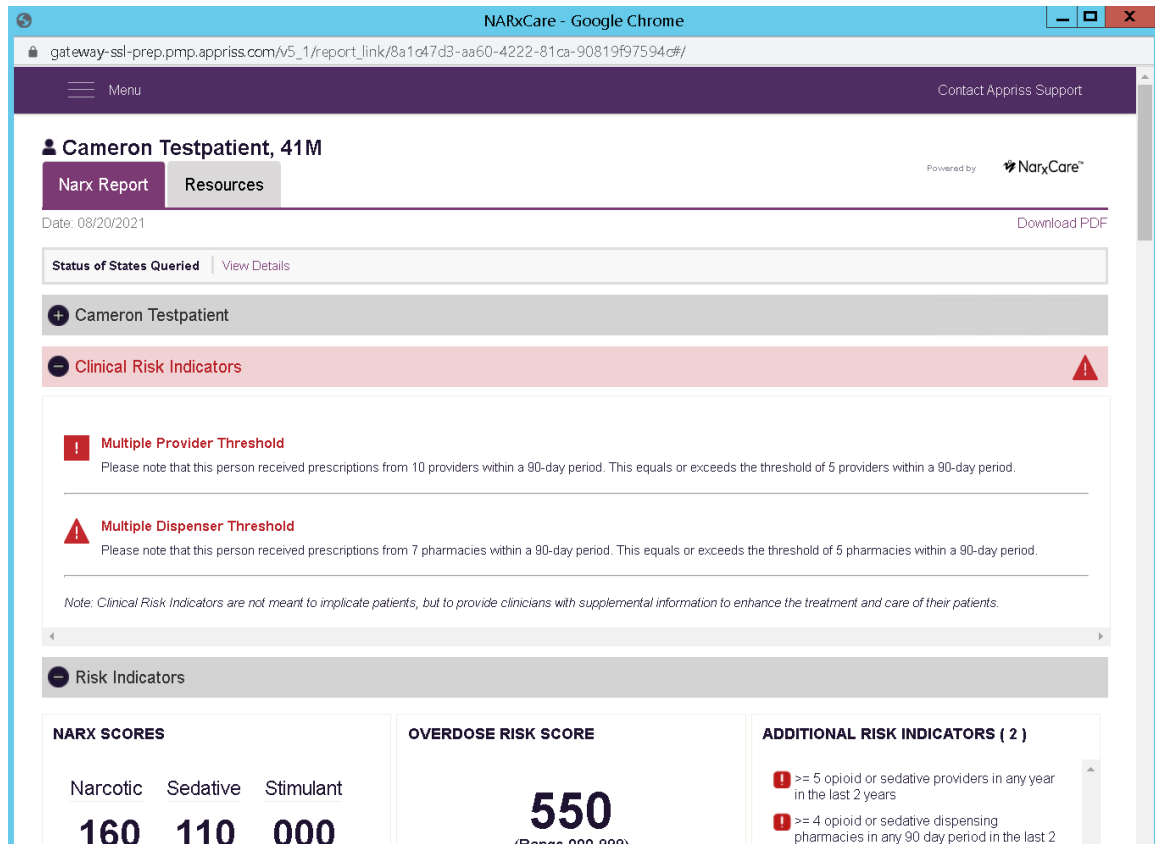
f. If report retrieval was successful:



The screenshot displays the NC HealthConnex interface for a patient named TESTPATIENT, CAMERON. The top navigation bar includes links for Patient Search, Clinician Tools, NC Notify, My Account, Logout, and Help. The patient's profile information is shown, including age (41 years), date of birth (08/08/1980), and address (123 RHODES WAY, COLUMBUS, OH 43215). The left sidebar contains a 'Chartbook' menu with options like Summary, Allergies & Alerts, Encounters, Medications, History, Conditions, Procedures/Results, Vaccinations, and Documents. The 'CSRS Report' option is selected and highlighted. The main content area shows a certification checkbox that is checked, followed by a 'CSRS Report' button. Below the button, a message states 'Report found and opened in new window...'. A disclaimer is also present, stating that the system relies on data from state Prescription Monitoring Programs and that the user is responsible for medical decisions based on this information.

- i. A message will display within the CSRS REPORT window stating: *“Report found and opened in new window”*.
- ii. The disclaimer information from CSRS will be displayed: *“Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use thereof. If you believe the information is incomplete, please log into the state prescription monitoring program website to verify.”*

6. A new window will launch displaying the CSRS Report.



- a. If there is an error with the Report Link an error message will be displayed in the new window. (See Appendix C)
- b. To download the PDF report, click, “Download PDF” in the top right-hand corner. The download toolbar with document will display at the bottom of webpage.

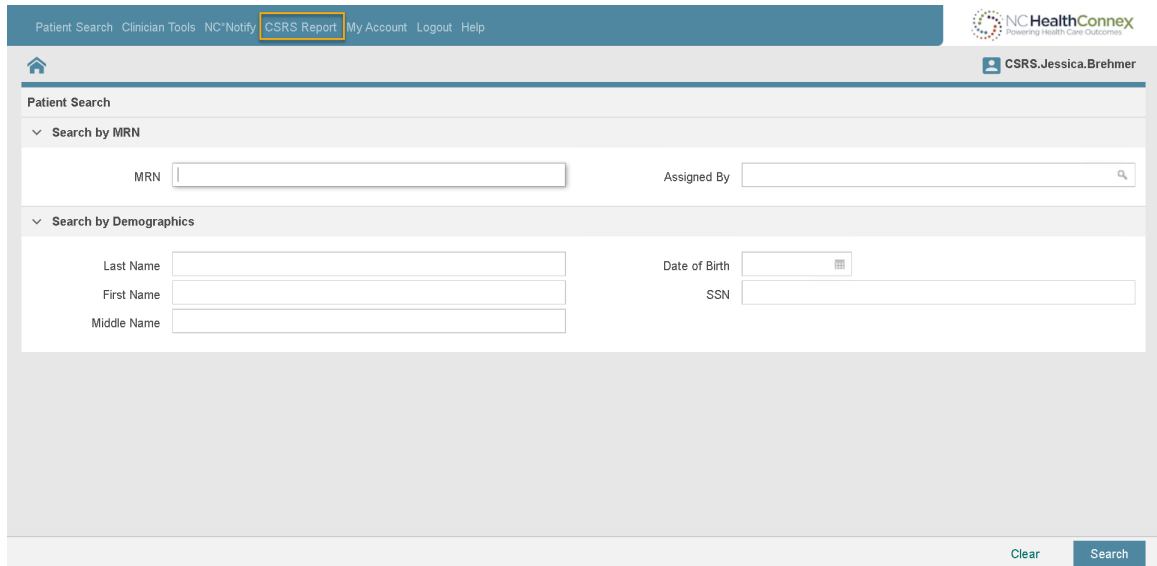
7. If a user closes the popup window, they may view the report again using the CSRS Report button. This creates a subsequent Report Request to CSRS.

Accessing Patients Without a Clinical Record

Note: Under state law, patients who have opted out of NC HealthConnex cannot opt out of CSRS and can be search through this method.

In some instances, a provider might search for a patient who does not have clinical records stored in the HIE. In this situation, a portal user may still access the CSRS report for that patient through the following steps.

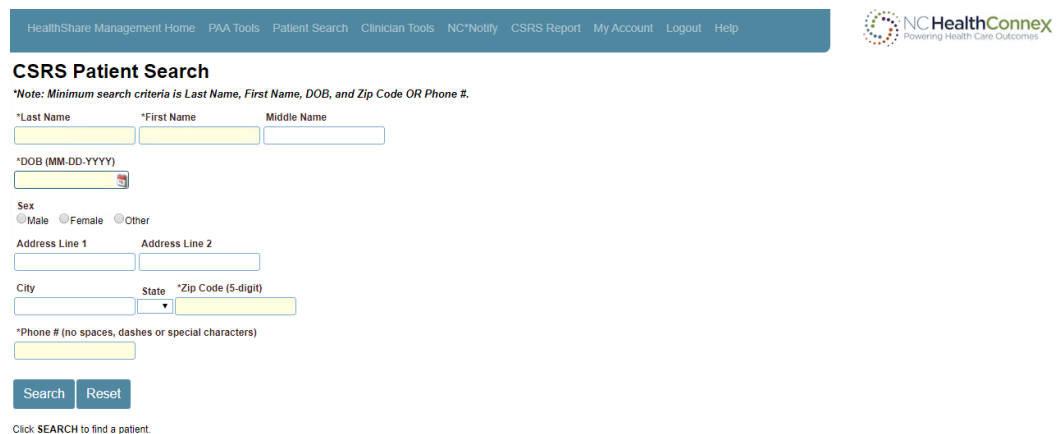
1. A portal user with a CSRS role selects the CSRS Report tab in the top menu.



The screenshot shows the top navigation bar with the following items: Patient Search, Clinician Tools, NC*Notify, **CSRS Report** (highlighted with a yellow box), My Account, Logout, and Help. Below the navigation bar, the user is logged in as CSRS.Jessica.Brehmer. The main content area is titled "Patient Search" and contains two search sections: "Search by MRN" with an MRN input field and an "Assigned By" dropdown, and "Search by Demographics" with input fields for Last Name, First Name, Middle Name, Date of Birth, and SSN. At the bottom right, there are "Clear" and "Search" buttons.

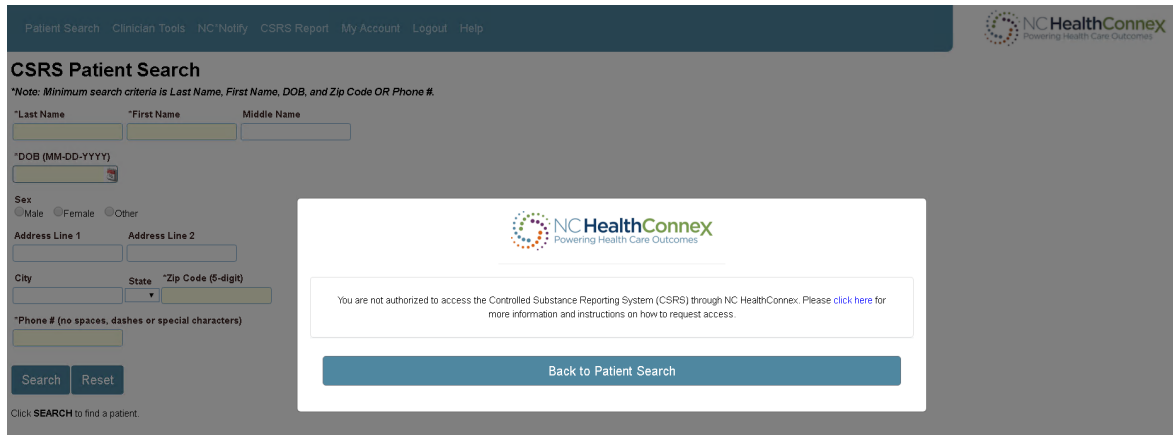
2. The user is presented with one of the following screens.

- a. Access Granted



The screenshot shows the "CSRS Patient Search" form. At the top, the navigation bar includes: HealthShare Management Home, PAA Tools, Patient Search, Clinician Tools, NC*Notify, CSRS Report, My Account, Logout, and Help. The form title is "CSRS Patient Search" with a note: **Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.* The form contains the following fields: *Last Name, *First Name, Middle Name, *DOB (MM-DD-YYYY), Sex (radio buttons for Male, Female, Other), Address Line 1, Address Line 2, City, State (dropdown), *Zip Code (5-digit), and *Phone # (no spaces, dashes or special characters). At the bottom, there are "Search" and "Reset" buttons, and a note: "Click SEARCH to find a patient."

b. Access Denied



HealthShare Management Home PAA Tools Patient Search Clinician Tools NC*Notify CSRS Report My Account Logout Help

CSRS Patient Search

**Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.*

*Last Name *First Name Middle Name

*DOB (MM-DD-YYYY)

Sex
 Male Female Other


Address Line 1 Address Line 2

City State *Zip Code (5-digit)

*Phone # (no spaces, dashes or special characters)

Search Reset

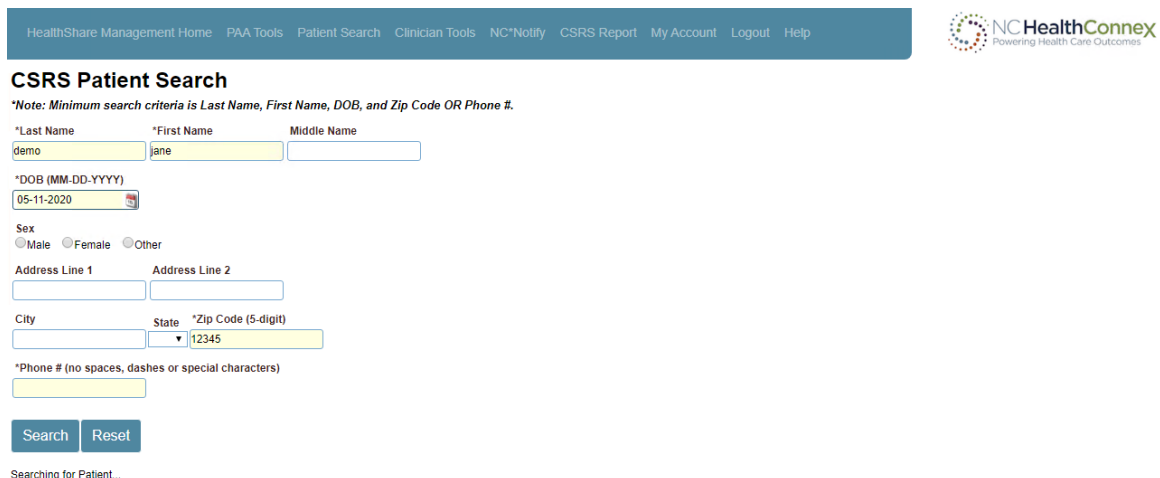
Click **SEARCH** to find a patient.



You are not authorized to access the Controlled Substance Reporting System (CSRS) through NC HealthConnex. Please [click here](#) for more information and instructions on how to request access.

Back to Patient Search

3. The user fills out the form, entering at least the following minimum required fields:
 - a. Last name
 - b. First name
 - c. Date of birth
 - d. Zip code or phone #
4. The user clicks on the Search button.
5. If minimum required fields are not populated, the user will receive an error message. (See Appendix D).
6. The CSRS screen displays a message “Searching for patient...”



HealthShare Management Home PAA Tools Patient Search Clinician Tools NC*Notify CSRS Report My Account Logout Help

CSRS Patient Search

**Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.*

*Last Name *First Name Middle Name

*DOB (MM-DD-YYYY)

Sex
 Male Female Other

Address Line 1 Address Line 2

City State *Zip Code (5-digit)

*Phone # (no spaces, dashes or special characters)

Search Reset

Searching for Patient...

7. Once the patient search has completed, the response is returned to the CSRS screen. If an error is returned the Error Message is displayed. (See Appendix A.)

- Once a patient is found, the user initiates retrieval of the CSRS report. They confirm they want to access the CSRS report by checking the consent box, which enables the CSRS Report button. They click that button.

HealthShare Management Home | PAA Tools | Patient Search | Clinician Tools | NC*Notify | CSRS Report | My Account | Logout | Help

CSRS Patient Search

**Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.*

*Last Name: *First Name: Middle Name:

*DOB (MM-DD-YYYY):

Sex: Male Female Other

Address Line 1: Address Line 2:

City: State: *Zip Code (5-digit):

*Phone # (no spaces, dashes or special characters):

Reset

Patient Found...

No prescription data is available from your state PMP for this patient.

I certify that I have been approved by the State of NC to access information in the controlled substance database. I certify that the patient on whom I am requesting information is a current or prospective patient of mine. I understand inappropriate access or disclosure of this information is a violation of state law and may result in civil penalties, disciplinary action by my licensing board and/or revocation of database access privileges.

CSRS Report

Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use

- The CSRS screen displays “Fetching Report ...”

HealthShare Management Home | PAA Tools | Patient Search | Clinician Tools | NC*Notify | CSRS Report | My Account | Logout | Help

CSRS Patient Search

**Note: Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.*

*Last Name: *First Name: Middle Name:

*DOB (MM-DD-YYYY):

Sex: Male Female Other

Address Line 1: Address Line 2:

City: State: *Zip Code (5-digit):

*Phone # (no spaces, dashes or special characters):

Reset

Patient Found...

No prescription data is available from your state PMP for this patient.

I certify that I have been approved by the State of NC to access information in the controlled substance database. I certify that the patient on whom I am requesting information is a current or prospective patient of mine. I understand inappropriate access or disclosure of this information is a violation of state law and may result in civil penalties, disciplinary action by my licensing board and/or revocation of database access privileges.

CSRS Report

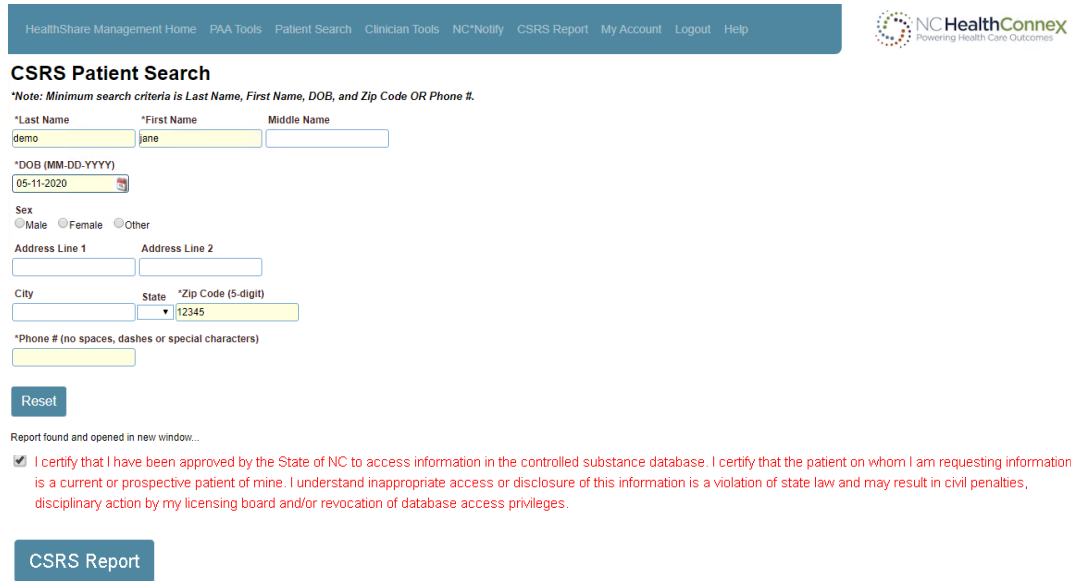
Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use

10. If report retrieval returns an error in the response, it displays within the CSRS screen. (See Appendix B.)

11. If report retrieval was successful:

- a. A message will display within the CSRS Report window stating: *“Report found and opened in new window.”*

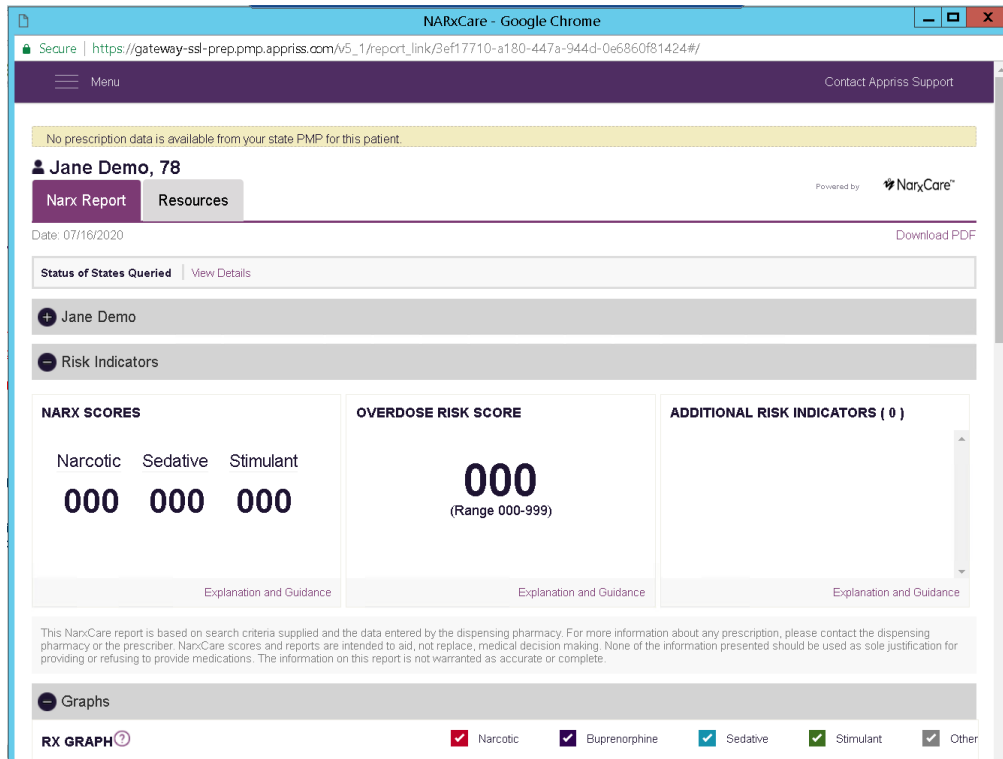
Note: Pop-up blocker must be disabled.



Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use

- b. The disclaimer information from the CSRS is displayed: *“Disclaimer: PMP Gateway, NARxCHECK, and NarxCare rely upon data provided by state Prescription Monitoring Programs. You agree that you are solely responsible for the medical decisions made using this information and agree to indemnify and hold harmless, the providers of this service and the information for all claims based on your use thereof. If you believe the information is incomplete, please log into the state prescription monitoring program website to verify.”*

c. A new window launches, displaying the CSRS Report:



d. If there is an error with the Report Link, an error message is displayed in the new window. (See Appendix C.)

e. To download the PDF report, click, “Download PDF” in the top right-hand corner. The download toolbar with document displays at the bottom of the webpage.

12. If a user closes the popup window, they can view the report again using the CSRS Document button. This creates a subsequent Report Request to CSRS.

Appendix A — Patient Request Errors

400 - Bad Request

Request parsing error

Invalid xml request

401 - Unauthorized

Unauthorized

HTTP Custom Auth: Access denied

5XX - Server Error

Internal Server Error

Service Unavailable

Gateway Timeout

Appendix B — Report Request Errors

400 - Bad Request

Request parsing error

Invalid xml request

401 - Unauthorized

Unauthorized

HTTP Custom Auth: Access denied.

403 - Forbidden

Report with id 1234567890 belongs to another user.

404 - Not Found

Report with id 1234567890 not found.

410 - Gone

Report with id 1234567890 has expired.

5XX - Server Error

Internal Server Error

Service Unavailable

Gateway Timeout

Appendix C — Report Link Errors

404 - Not Found

No report found at that link.

Report Request not found

410 - Gone

Report has already been delivered. Report links can only be used once.

Report already delivered

Appendix D – Manual Patient Search Errors

localhost:57774 says

Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.

Missing:

- Last Name and/or First Name
- Date of Birth
- Zip Code or Phone #

OK

localhost:57774 says

Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.

Missing:

- Date of Birth
- Zip Code or Phone #

OK

localhost:57774 says

Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.

Missing:

- Zip Code or Phone #

OK

localhost:57774 says

Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.

Missing:
Valid 10 digit Phone #. Example: 5551234567

OK

localhost:57774 says

Minimum search criteria is Last Name, First Name, DOB, and Zip Code OR Phone #.

Missing:
Valid 5 digit Zip Code. Example: 12345

OK