
NC HEALTHCONNEX CLINICAL PORTAL

Controlled Substance Reporting System (CSRS) 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 NC DHHS Division of Mental Health and hosted by Appriss Health. This will enable NC HealthConnex users to view controlled substance reports through the NC HealthConnex clinical portal.

User Experience

This integration will allow NC HealthConnex clinical portal users to access CSRS reports within the clinical viewer. Portal users will be able to access CSRS reports for patients within the clinical viewer.

Workflow

Accessing A Patient 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.

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

EMR Id
Assigned By

Last Name
First Name
Middle Name
Date of Birth
MM-DD-YYYY

Search

Recent Patient Searches

Last, First	Sex	DOB
DEMO,JANE M	F	1942-03-29



2. User selects Patient to view patient record

Patient Search Clinician Tools CSRS Report My Account Logout Help

EMR Id
Assigned By

Last Name
First Name
Middle Name
Date of Birth
MM-DD-YYYY

Search

View Records

Identifiers	Name	Gender/DOB	Address
<input checked="" type="checkbox"/> <input type="checkbox"/> 100217038...4321	DEMO, JANE M	F 1942-03-29	123 UNKNOWN LN, RALEIGH NC 27565



- Once at the **Patient View** screen, navigate to the “CSRS Report” tab.

The screenshot shows the NC HealthConnex interface. At the top left is the logo for NC HealthConnex with the tagline "Powering Health Care Outcomes". To the right is a navigation bar with links for Patient Search, Messages (0), Clinician Tools, NC*Notify, CSRS Report, My Account, Logout, and Help. Below the navigation bar is a "view timeline" section with a list of tabs: Summary, Allergies & Alerts, Encounters, Medications, History, Conditions, Procedures/Results, Vaccinations, Documents, and CSRS Report. The CSRS Report tab is highlighted with a purple border. The main content area is titled "CSRS REPORT" and contains a red text block with a checkbox: 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 text is a button labeled "CSRS Report". At the bottom of the content area, there is a text instruction: "Click button above to fetch report".

- User clicks the CSRS Report tab and is presented with one of the following screens:

a. Access Granted:



view timeline

- Summary
- Allergies & Alerts
- Encounters
- Medications
- History
- Conditions
- Procedures/Results
- Vaccinations
- Documents
- CSRS Report**

CSRS REPORT

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

Click button above to fetch report

b. Access Denied:

view timeline

- Summary
- Allergies & Alerts
- Encounters
- Medications
- History
- Conditions
- Procedures/Results
- Vaccinations
- Documents
- CSRS Report**

CSRS REPORT



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.

- To initiate the process of retrieving a CSRS Report the user must:
 - First confirm that they want to access the CSRS Report. This is done by checking the consent box, which will enable the CSRS Report button.
 - User will then need to click the CSRS Report button to fetch the report for this patient.

› view timeline

- Summary
- Allergies & Alerts
- Encounters
- Medications
- History
- Conditions
- Procedures/Results
- Vaccinations
- Documents
- CSRS Report**

CSRS REPORT

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

Click button above to fetch report

- 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)

The screenshot shows the NC HealthConnex interface. At the top left is the logo for NC HealthConnex with the tagline "Powering Health Care Outcomes". To the right is a navigation bar with links for Patient Search, Messages (0), Clinician Tools, NC*Notify, CSRS Report, My Account, Logout, and Help. Below the navigation bar is a "view timeline" section with a vertical list of menu items: Summary, Allergies & Alerts, Encounters, Medications, History, Conditions, Procedures/Results, Vaccinations, Documents, and CSRS Report. The CSRS Report item is highlighted with a purple border. To the right of the menu is the main content area titled "CSRS REPORT". It contains a red checkbox with a checkmark and a red text block: "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 text is a button labeled "CSRS Report". At the bottom of the main content area, there is a red error message: "Error encountered searching for patient: Patient response not found. Please try again later".

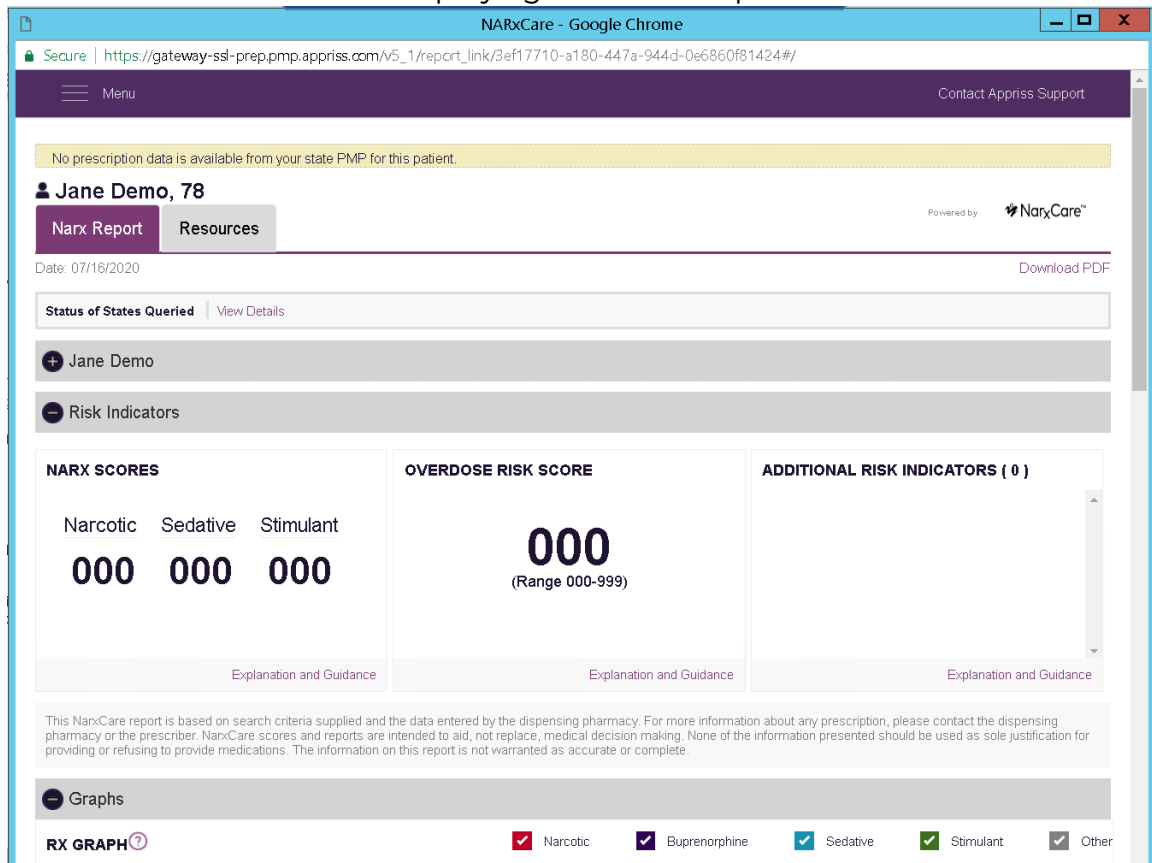
- d. If the CSRS Report request prefetch was successful, retrieval of the CSRS Report will be initiated.
- e. If report retrieval returned an error in the response, it will display within the CSRS REPORT window. (See Appendix B)

f. If report retrieval was successful:

The screenshot shows the NC HealthConnex interface. At the top, there is a navigation bar with links for Patient Search, Messages (0), Clinician Tools, NC*Notify, CSRS Report, My Account, Logout, and Help. Below this is a 'view timeline' section with a list of menu items: Summary, Allergies & Alerts, Encounters, Medications, History, Conditions, Procedures/Results, Vaccinations, Documents, and CSRS Report (which is highlighted). The main content area is titled 'CSRS REPORT' and contains a checkbox with a checkmark and the following text: '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 text is a button labeled 'CSRS Report'. Underneath the button, it says 'Report found and opened in new window'. At the bottom, there is a disclaimer: '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.'

- 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:



- i. If there is an error with the Report Link an error message will be displayed in the new window. (See Appendix C)
- ii. 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.

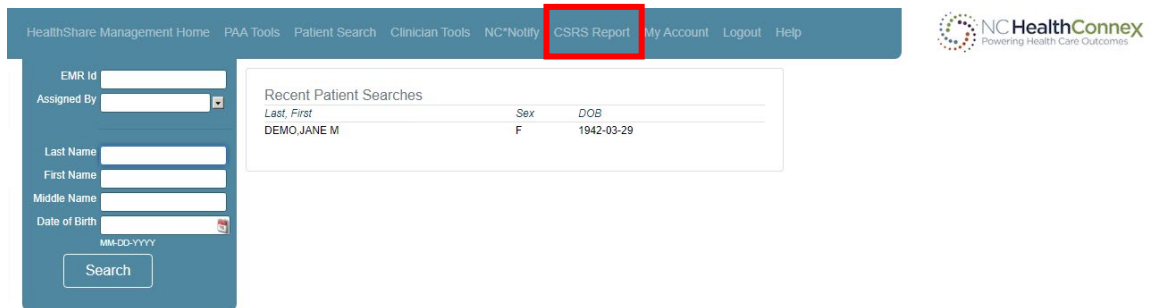
7. If a user closes the popup window, they may view the report again using the CSRS Report button. This will create a subsequent Report Request to CSRS.

Accessing Patients Without A Clinical Record

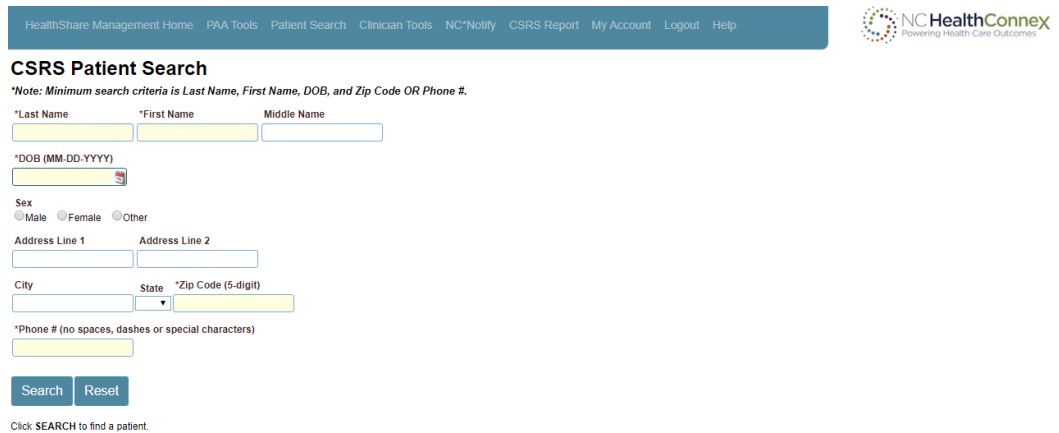
Note: Patients who have opted out of the HIE cannot opt out of CSRS pursuant to state law and can be search through this method.

There may be instances in which a provider is searching for a patient that may not have clinical records stored in the HIE. In this situation, a portal user may still access the CSRS report for that patient by using the steps below:

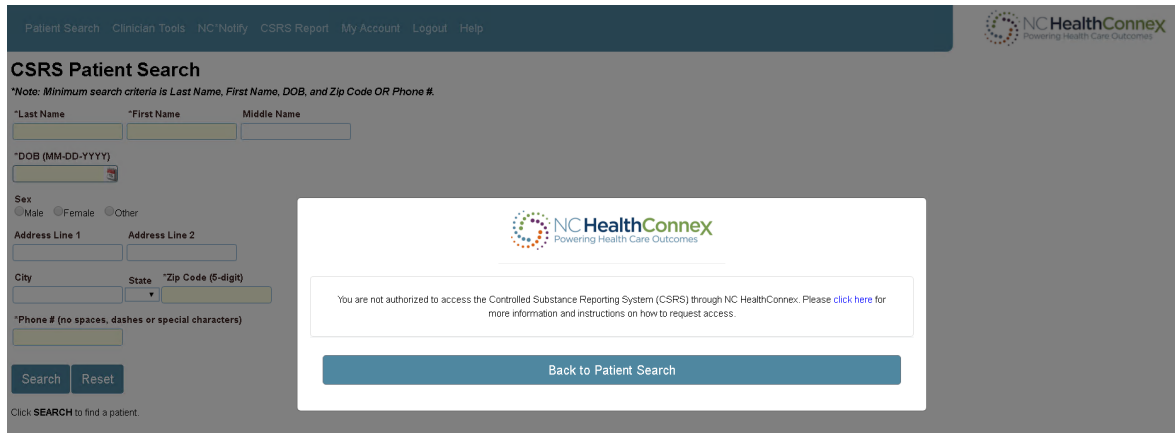
1. A portal user with a CSRS role selects the CSRS Report tab in the top menu.



2. User is presented with one of the following screens:
 - a. Access Granted:



3. Access Denied:



4. 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 #

5. User clicks on the Search button.
 - a. If minimum required fields are not populated, the user will receive an error message. (See Appendix D).
6. The CSRS screen will display a message “Searching for patient...”

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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)

Searching for Patient...

7. Once the patient search has completed, the response will be returned to the CSRS screen.
 - a. If an error is returned the Error Message will be displayed. (See Appendix A)
8. Once a patient has been found, the user can initiate the process of retrieving the CSRS report by:
 - a. First confirming that they want to access the report from the CSRS. This is done by checking the consent box, which will enable the CSRS Report button.

b. User will then need to click the CSRS Report 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)

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.

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

9. The CSRS screen will display “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)

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.

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10. If report retrieval returned an error in the response, it will display 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.

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 NC HealthConnex
Powering Health Care Outcomes

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)

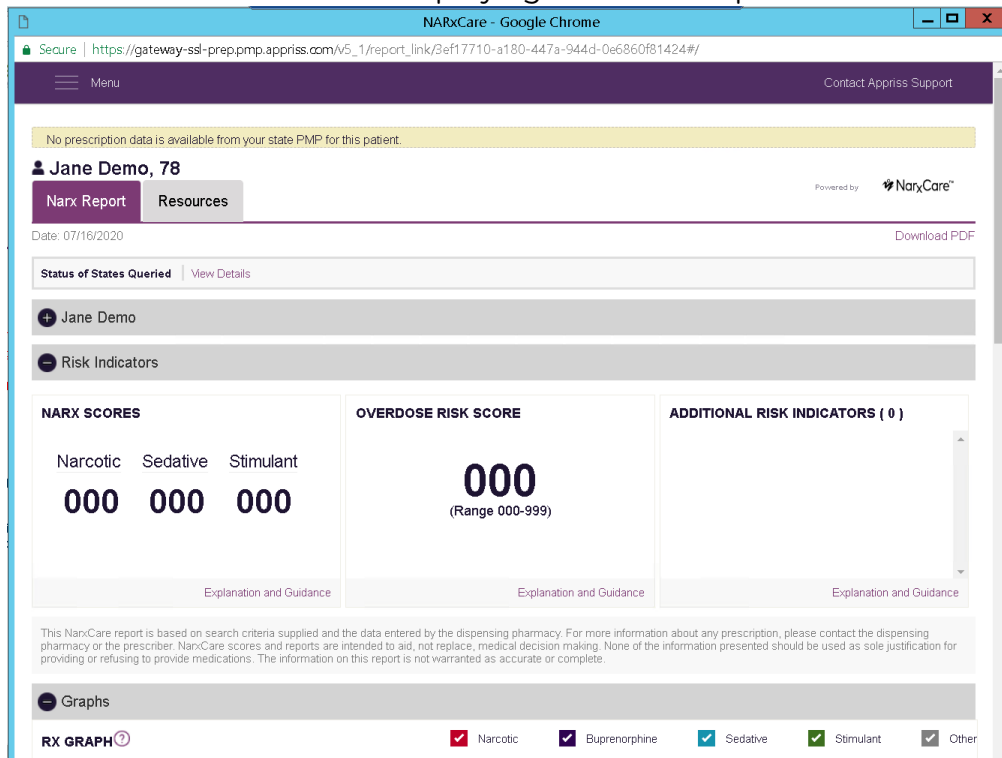
Report found and opened in new window...

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.

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 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.

- c. A new window will launch displaying the CSRS Report:



- d. If there is an error with the Report Link an error message will be 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 will display at the bottom of webpage.

12. If a user closes the popup window, they may view the report again using the CSRS Document button. This will create 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.

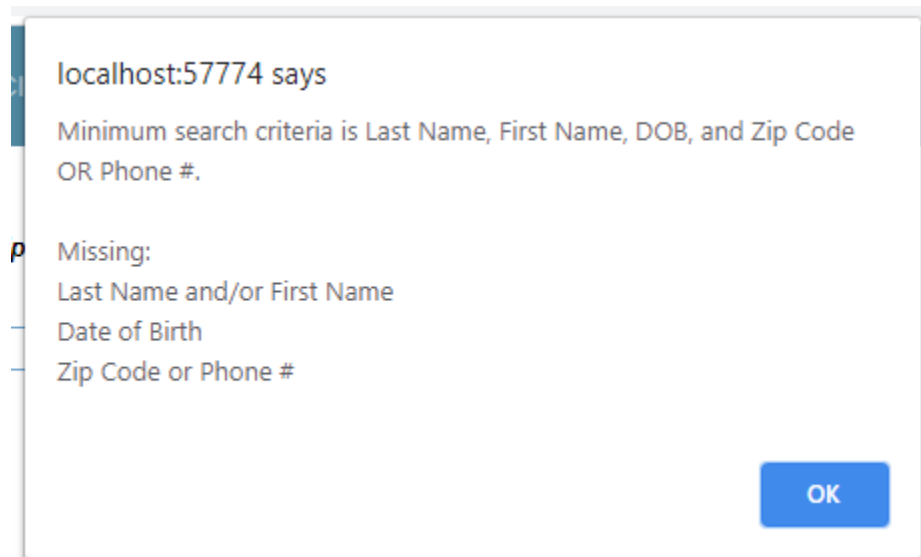
Report Request not found

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:

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