

## Table of Contents - Jump to a section below

[Access and Document a Chart/Progress Note](#)

[Access and Document a Group Note](#)

[Access and Document a Miscellaneous Note](#)

[Update Group Notes and Group Note Correction](#)

[Edit a Draft Note or Edit Finalized Note \(Non-Group Notes\)](#)

In NextStep Solutions, Notes are the way in which you document long-term client care and progress. Compared to Forms, they are more of a running narrative, whereas Forms tend to be more on-off in nature. You can think of Notes in NSS as a “yellow notepad” - a running log of information.

[Back to Top](#)

## Access and Document a Chart/Progress Note

Chart/Progress Notes is where you go to document the client’s progress. At a minimum, this type of Note includes charting on the objectives selected from the client’s Treatment Plan. This type of Note can also include any relevant custom fields your Agency has created for documentation. As long as the client has an active Treatment Plan, these Notes can be accessed and updated until the point where they are finalized.

1. Navigate to Chart/Progress Notes: **Main Menu > Progress Notes Menu > Chart/Progress Notes**.
2. Search for and select a client if not already displayed. The client’s Chart/Progress Notes are displayed.
3. The **Show Only Those Goals For the Selected Intervention** drop-down is defaulted to All Interventions, select an individual intervention if necessary.
4. Under each Outcome, click the **plus sign** to expand more details and update client progress on their goals.
5. In the **Enter Chart Note** field, type to enter details.
6. Enter visit information into the **Billing Data** widget if the Service provided is billable.  
**Note:** You can track multiple billings in one session, such as individual therapy and telemedicine, by clicking **Add Additional Billing Data**. Refer to your agency’s Admin/Superusers for more details as to your agency’s billing protocols.
7. (Optional) Forward Chart/Progress Notes to other clinicians involved in the client’s care by selecting user(s) from the **Note Routing** section.  
**Note:** Multiple users can be selected by holding the **Ctrl key** and selecting users. Or, if the users are listed in sequence, hold the **Shift key** and click on a name to start the list and click a name to end the list.
8. (Optional) In the Comment field, add comments as necessary.

9. (Optional) Search pre-existing Notes via the Search Notes section.
  - From the **Service Provider** drop-down, search by Any User or select a specific user.
  - Populate the **Service Date on or after** field and the **Service Date on or before** field with a date range of pre-existing Notes to search.
  - From the **Chart Type** drop-down, select a specific Chart Type if you don't want to search by All Notes & Case Manager Summary.
  - From the **Case Selection** drop-down, select a specific Case if you don't want to search by All Cases.
  - Select the **Show Billing Info** checkbox if you'd like billing details displayed for past Notes.
  - Select the **Show Progress Indicators** checkbox if you'd like the progress indicators displayed for past Notes.
  - Select the **Show Dynamic Fields** checkbox if you'd like dynamic fields displayed for past Notes.
  - Select the **Show Note Updates** checkbox if you'd like to see a history of when past Notes were updated and by who.
  - Enter text into the **Keyword Search** field to search Note text.
  - Click the **Show Notes** button.
10. Finalize, save as a draft, or exit the Note by following the appropriate steps below:
  - **Finalize:**
    - a. Click the **Enter Charts (Final)** button.
    - b. Click the **Yes** button to confirm you want to finalize the Note.
    - c. Enter your **Password** to sign the Note or click the **Use E-Signatures** button to use a Topaz/Touch Signature.
    - d. Click the **Submit** button.
  - **Save:**
    - a. Click the **Enter Charts (Draft)** button.
    - b. Click the **Yes** button to confirm you want to save this Note as a draft.
  - **Exit:**
    - a. Click the **Main Menu** button to return to the menu without saving the Note.

[Back to Top](#)

## Access and Document a Miscellaneous Note

A Miscellaneous Note is the only type of Note that can be entered without an active Treatment Plan for a client. It functions as a catch-all Note for non-treatment-related documentation.

1. Navigate to Misc Notes: **Main Menu > Progress Notes Menu > Misc Notes.**

2. Search for and select a client if not already displayed. The client's Chart/Progress Notes are displayed with the **Date of Service** defaulted to the current date.
3. In the **Add a New Note** text field, enter your documentation.
4. Enter billing information into the **Billing Data** box if applicable.
5. *(Optional)* Forward Misc Notes to other clinicians involved in the client's care by selecting user(s) from the **Note Routing** section.

**Note:** Multiple users can be selected by holding the **Ctrl key** and selecting users. Or, if the users are listed in sequence, hold the **Shift key** and click on a name to start the list and click a name to end the list.

7. *(Optional)* In the Search Notes section, use the **Search Criteria** fields to search for past Notes.
8. Finalize, save as a draft, or exit the Note by following the appropriate steps below:
  - **Finalize:**
    - a. Click the **Enter Charts (Final)** button.
    - b. Click the **Yes** button to confirm you want to finalize the Note.
    - c. Enter your **Password** to sign the Note or click the **Use E-Signatures** button to use a Topaz/Touch Signature.
    - d. Click the **Submit** button.
  - **Save:**
    - a. Click the **Enter Charts (Draft)** button.
    - b. Click the **Yes** button to confirm you want to save this Note as a draft.
  - **Exit:**
    - b. Click the **Main Menu** button to return to the menu without saving the Note.

[Back to Top](#)

## Edit a Draft Note or Edit Finalized Note (Non-Group Notes)

### Access and Edit a Draft Note (Non-Group Notes)

1. Navigate to the draft Note.
2. Search for and select the client if not already displayed.
3. Scroll to the Search Notes section.
4. Adjust your Search Criteria, if necessary, and click the **Show Notes** button.
5. Click the **Edit/Finalize** button.
6. Make changes as necessary and finalize the Note.

## Edit Finalized Notes

After a Note has been finalized, it is still able to be updated (or amended) and re-finalized. These options are displayed at the bottom of a Chart/Progress Note, Medical Notes, or Misc Notes in the Search Notes section of a Note and can also be accessed via the Document Center.

### 1. Access Finalized Notes:

- **Via the Note:**
  - Navigate to a Note (a non-Group Note).
  - Search for and select a client if not already displayed.
  - Scroll to the Search Notes section.
  - Adjust your Search Criteria if necessary and click the **Show Notes** button.
- **Via the Document Center:**
  - a. Navigate to the Document Center: **Reports > Document Center**.
  - b. Search for and select the client if not already displayed.
  - c. Select a **Case #** radio button.
  - d. Click the **Open Case** button.
  - e. Select the radio button of the Note you want to open.
  - f. Click the **Open Form** button.
  - g. Select one of the following buttons:
    - **Add Amendment:** Allows a note to be applied to the original Note after it has been finalized/sealed.
    - **Edit Billing:** If billing information was not sent to the Billing Engine, this option is available so that you may resolve any billing issues or missing information.
    - **Correct:** Admin users can unseal the note and allow clinicians to update/edit previously signed notes.
    - **Sign:** Finalize/seal once updates have been made.
    - **Printable:** Opens the Note in a separate window/printable format.

[Back to Top](#)

## Access and Document a Group Note

Group Notes are used to document Group Therapy activities and/or sessions and allow you to enter documentation for each client in the Group without having to create an individual Note for each. The appearance of your Group Notes window is determined by what you have enabled for your Agency.

## Access and Document a Group Note

1. Navigate to Group Notes: **Main Menu > Progress Notes Menu > Group Notes.**
2. Select an existing Group or create a new Group:
  - For existing Groups:
    - a. In the **Select an Existing Group** field, start typing the name of the Group and select it from the list.  
**Note:** Select the **View my groups only** checkbox to narrow down your search to only your Groups.
  - Create a new Group:
    - a. In the **Group Name** field, enter a name for the Group.
    - b. Select a **Location** from the drop-down.
    - c. *(Optional)* Select the **Temporary** checkbox if this Group is only temporary.
    - d. Click the **Create** button.
3. *(Optional)* Adjust the **Capacity** field in Group Counts as necessary.  
**Note:** When a user is added or removed from the Group, the Client Count field increases or decreases. The difference between the Capacity and Client Count fields is what is displayed in Spots Remaining, which will turn red if your Group exceeds capacity.
4. *(Optional)* If the Schedule is enabled, adjust the days and times the Group typically meets, as necessary. This is for informational purposes only.
5. In the **Clients, Interventions,** and **Users** fields, type and search for any clients, interventions, or users that need to be added to the group and click the **Add** button. To remove a client, intervention, or user click the **X** next to which selection you'd like to remove.  
**Note:** See the [Manage a User's Group Scheduler Appointments](#) and [Manage a Client's Group Scheduler Appointments](#) sections below to learn how adding and removing clients and users prompts you with the ability to add the clients and users to or remove them from an existing Group Scheduler appointment.
6. If the Group Note section is not displayed because autoload functionality is not enabled, click the **Turn Load On** button.
7. In the **Group Note** text field, type your Note that applies to all clients in the Group.
8. The **Date of Service** defaults to the current date. Enter billing information for the Group in the first **Billing Data** box that is displayed. The information entered here auto-populates billing information into each one of the individual **Billing Data 1** boxes displayed under each client in the Group.  
**Note:** After entering billing information into the main billing box, you can edit individual client information in their specific billing boxes.

9. Select the **Attended** or **Did Not Attend** radio button for each client and their **Participation** or other details shown in your Group Note.
9. As you move through Group Notes, the data is autosaved. Click the **Enter Charts as Final** button to finalize the Note.
10. Click the **Yes** button to confirm that you'd like to submit this Note as final.
11. Enter your **Password** or click on the **Use E-Signature** button to use an electronic signature.
12. Click the **Submit** button.

## Manage a User's Group Scheduler Appointments

When adding or removing users in the [Access and Document a Group Note](#) steps, you have the ability to add or remove that user from an existing Group Scheduler Appointment directly from Group Notes. In order for your Agency to utilize this functionality, you must be using the Scheduler and have the *EZScheduleLibrary* setup variable enabled. Please contact NSS Support and reference the setup variable, if you need this turned on.

1. Navigate to Group Notes: **Main Menu > Progress Notes Menu > Group Notes.**
2. Select an existing group.
  - To add a user to an existing Group Scheduler appointment:
    - a. Under Users, add a new user to the group by typing and selecting their name and then click the **Add** button.  
**Note:** Click the **Filter** icon to narrow down your search by User Role.
    - b. In the Add to Existing Group Appointments window, select the checkbox in the header to select all appointments or individually select appointments.
    - c. Click the **Add** button. A pop-up is displayed, "Successfully added user to appointments."
  - To remove a user from an existing Group Scheduler appointment:
    - a. Under Users, click the **X** next to the user's name. A pop-up is displayed, "Successfully removed from future appointments."

## Manage a Client's Group Scheduler Appointments

When adding or removing clients in the [Access and Document a Group Note](#) steps, you have the ability to add or remove clients from an existing Group Scheduler Appointment directly from Group Notes. In order for your Agency to utilize this functionality, you must be using the Scheduler and have the *EZScheduleLibrary* setup variable enabled. Please contact NSS Support and reference the setup variable, if you need this turned on.

1. Navigate to Group Notes: **Main Menu > Progress Notes Menu > Group Notes.**

2. Select an existing group.
  - To add a client to an existing Group Scheduler appointment:
    - a. Under Clients, add a new client to the group by typing and selecting their name and then clicking the **Add** button.

**Note:** Click the **Filter** icon to narrow down your search by Case Assignments, Programs, and Locations.
    - b. In the Add to Existing Group Appointments window, select the checkbox in the header to select all appointments or individually select appointments.
    - c. Click the **Add** button. A pop-up is displayed, “Successfully created appointments.”
  - To remove a client from an existing Group Scheduler appointment:
    - a. Under Clients, click the **X** next to the user’s name. A pop-up is displayed, “Successfully removed from future appointments.”

[Back to Top](#)

## Update Group Notes and Group Note Correction

As you move through the Group Note, the data entered is autosaved. The Note is always in draft mode unless you enter the Group Note as final.

### Edit a Draft Group Note

1. Navigate to Group Notes: **Main Menu > Progress Notes Menu > Group Notes.**
2. In the **Select an Existing Group** field, start typing the name of the Group and select it from the list.

**Note:** Select the **View my groups only** checkbox to narrow down your search to only your Groups.
3. Make edits as necessary.
4. Click the **Enter Charts as Final** button.
5. A pop-up is displayed informing you that entering this Group Note will make it final. Click the **Yes** button.

### Add an Amendment or Edit Billing for a Finalized Group Note

1. Navigate to the Document Center: **Main Menu > Reports Menu > Document Center.**
2. Search for and select the client if not already displayed.
3. Select a **Case #** radio button.
4. Click the **Open Case** button.
5. Select the **Group Notes Only** radio button.
6. Click the **Open Form** button.
7. In the Search Notes section, enter your search criteria and then click the **Show Notes** button.
8. Click one of the following buttons for the Group Note:

- **Add Amendment:** Allows a note to be applied to the original Note after it has been finalized/sealed.
- **Edit Billing:** If billing information was not sent to the Billing Engine, this option is available so that you may resolve any billing issues or missing information.
- **Sign:** Finalize/seal once updates have been made.
- **Printable:** Opens the Note in a separate window/printable format.

## Group Note Correction

Only users with the permission, **Group Notes Correction**, can make corrections to Group Notes.

1. Navigate to Group Note Correction: **Main Menu > Admin Tools Menu > Group Note Correction**.
2. In the **User** drop-down, select the user who entered the Group Note.
3. Enter a date range for the Group Note, and click the **Search Notes** button. The grid is populated with Group Notes based on the user and date range you entered.
4. Depending on what is being corrected, proceed to the correct section below.
  - **Correct an Entire Group Note**
    - a. Double-click on the correctable fields at the Group Note level. The correctable fields are: **Date of Service**, **Start** and **Stop Time** (note time, not billing), **Group Narrative**.
    - b. Make the necessary correction(s).
    - c. Click the **Save Changes** button. You can also **Preview** the Changes or **Cancel** the Changes to revert back to the original Note.
  - **Correct an Individual Note within a Group Note**
    - a. Within the Group Note Correction tool, click + to expand the Group Note to display the individuals included in the Group Note.
    - b. Double-click in the **Note Text** field for the Goal that requires a correction to be made.
    - c. Make the necessary correction(s).
    - d. Click the **Save Changes** button. You can also **Preview** the Changes or **Cancel** the Changes to revert back to the original Note.

[Back to Top](#)