

This Basics QRG instructs on the basics of logging in, and provides an overview of the software from the home screen.

Log Into NextStep Solutions

1. Open your Chrome web browser.
2. Navigate to www.nextstepms.com/CUSTOMERNAME (enter your Agency's name that was given to you).
3. Enter your provided Login Name and Password.



4. Click **Sign In**. If you received a temporary password, you will be prompted to select a new password.

Reminders List

Upon logging in, you're presented with the **Reminders List**, which is also accessible by clicking **Reminders** in the Navigation Panel. The Reminders window is grouped into sections and contains a list of client-centered tasks, messages, and other reminders you are required to complete. These reminders will not go away unless you complete the tasks.

REMINDERS LIST						
Click to view other reminder list Reminders List for Shawn Rosler on 02/09/2021 Sort by Client * Refresh List Collapse All * Expand All						
Draft Notes (Click Client Name to Go To Their Notes Screen):						
Enter text to search...						
Client	Original Author	Date of Service	Time Stamp	Type	#	
Raymond, Wesley	Brad O'Donnell	6/30/2020	6/30/2020 9:25:40 AM	Misc Note		
Sparrow, Jack	cgrimmie	8/25/2020	8/25/2020 3:47:01 PM	Misc Note		
Test, Erin	Shawn Rosler	12/29/2020	12/29/2020 1:34:06 PM	Medication Narrative		
Total Notes: 3						

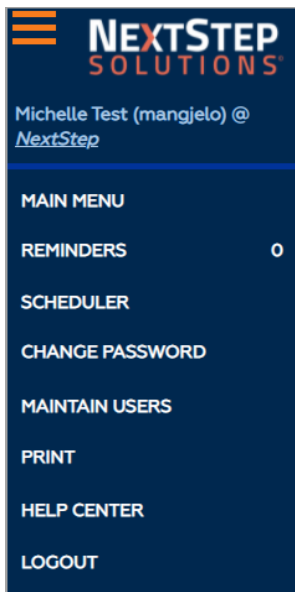
Reminders:

- Are received based on your role-specific workflow
- May include forms that are automatically due when a client is admitted, forms that have been started but not finalized, treatment plans due for review, and others.
- Can be sorted alphabetically by client using the Sort by Client button
- Include hyperlinked client names that take you to the area in the system where the work will be completed for the Reminder.

Home Screen Navigation

Each user's Navigation Panel and home screen is configured according to their role and workflow. Because of this, you may not see every option included in the images below.

Navigation Panel



- **Main Menu:** Return to the Main Menu/Home screen.
- **Reminders:** View a list of your pending work: reminders, tasks and messages.
- **Scheduler:** Navigate to the Scheduler (opens in a different browser window). From here, you can schedule clients and document basic demographic information.
- **Change Password:** Change your password.
- **Maintain Users:** Users with permissions will be able to add new users or edit users.
- **Print:** Print the current/active screen.
- **Help Center:** Open the NextStep Solutions Help Center in a separate browser.
- **Logout:** Logout of the NSS application

Home Screen

