

Clients are able to be placed in a pending admission status or admitted directly into a program. The pending admission status allows verification of client eligibility, as well as advance completion of forms associated with the admission.

Pending Admission

Adding the Client to NextStep Solutions

If your agency has a pre-admission process to certain programs, then you will want to follow the pending admission steps in NextStep Solutions to accurately capture the client data in order to determine which program they will follow:

1. Receive a call from a potential client.
2. Navigate to the **Home Page**.
3. Click **Face Sheet**.
4. Add client's first and last name to the **Face Sheet**.
5. Select **Pending Status** under **Admissions**.
6. Schedule an appointment for the client in the **Scheduler**.

ADD A NEW CLIENT

CLIENT INFORMATION

First Name:	<input type="text" value="Wesley"/>	Middle:	<input type="text"/>	Last:	<input type="text" value="Kteam"/>		
Birth Name:	<input type="text"/>	Suffix:	<input type="text"/>				
Date of Birth:	<input type="text" value="08/30/1977"/>	SSN:	<input type="text" value="523"/>	-	<input type="text" value="32"/>	-	<input type="text" value="2352"/>
Location:	<input type="text" value="ABC Primary - Troy:: ABC Primary Location, 123 Main Street , Troy, Michigan 48307"/>						
Admit?	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Pending				

Capture Client Information to Determine Admission

1. Send client pertinent **Weblinks** ([example](#)) containing all the information you usually send to clients who are in the pre-admission process (eg. Intake packets, Assessments, and Insurance Forms).
2. Once the client fills out the required forms, add them to their **Face Sheet** in NextStep Solutions.

- Forms** can be reviewed from the **Pending Web Forms** button prior to the patient arriving or with them in person. It is preferable to review them in person, as your organization will not get paid until the patient is seen for intake.

Direct Admission Into Program(s)

Case Assignment Section

Direct Admission into a program can be performed via the Case Assignment section of the client's FaceSheet, and should be performed when eligibility has already been established. It can also be used when your agency knows you will be admitting a client, but are uncertain of their level of care (Intensive inpatient, extended outpatient, etc.).

To directly admit into a program:

- Navigate to the **Case Assignment** section.
- Click **Yes** under the Admit field.
- Select a **Primary Program** from the list provided (Note: Secondary through Quaternary programs can be selected, as well.)

Note: Programs determine the forms that are available for assessments and scheduled forms.

Admit? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Pending			
Primary Program: <input type="text" value="Outpatient MH"/>	Secondary Program: <input type="text" value="Select A Program"/>	Third Program: <input type="text" value="Select A Program"/>	Fourth Program: <input type="text" value="Select A Program"/>
Primary Admission Date: <input type="text" value="02/09/2021"/>	Secondary Admission Date: <input type="text"/>	Third Admission Date: <input type="text"/>	Fourth Admission Date: <input type="text"/>
Primary Therapist: <input type="text" value="Shawn Rosler"/>	Supervisor: <input type="text" value="Megan Matlack"/>	Psychiatrist: <input type="text" value="None"/>	Intake Specialist: <input type="text" value="None"/>
Gender	<input type="text" value="Male"/>		
Race	<input type="text" value="Other Race"/>		
Ethnicity	<input type="text" value="Declined to Specify"/>		
Marital Status	<input type="text" value="Single"/>		
Education Level	<input type="text" value="Master's Degree"/>		

- Schedule an appointment** with the client to have them begin treatment in their respective program(s). They will be able to walk into your agency, be marked as seen, and enter into the program immediately.
 - Program enrollment** may change based on intake paperwork, the assessment performed during the intake (SA, MH, Psych, Detox, etc.)

- For example, if a patient is received by your agency severely intoxicated, it may be deemed necessary to place them in a detox program until they're able to finish the rest of the paperwork.
- These workflow specific details will be **agency-specific**.