Correction Capabilities QRG

Capabilities to Correct Notes, Forms, and More

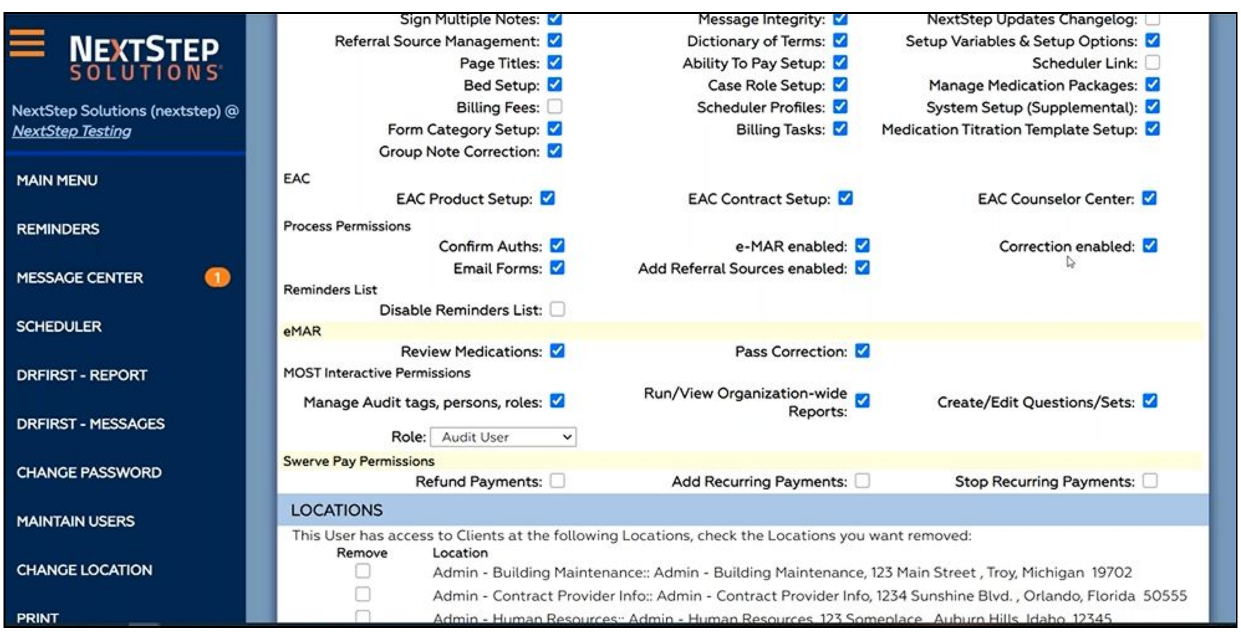
At times, it will be necessary to update a note, form, or plan that, at one time, you considered to be completed. Beyond the clinical aspect, even billing information can be noted as incomplete or incorrect. To update these critical pieces of client care documentation, you will need to possess **Correction Enabled** access and follow the workflows noted below, beginning with making sure that **Correction Enabled** is enabled.

Enabling Correction Enabled

While it may sound redundant, to make corrections in NextStep Solutions on either forms, notes, or other features, you must be a user who is enabled to make corrections. Here's how to change a user's permissions to enable corrections:

Step by Step - Enable Corrections Enabled

1. From the Main Menu, click **Maintain Users**.
2. Navigate to **Edit Users**, then select the user and choose to edit the user.
3. Locate the section titled **Process Permissions** and place a check next to **Correction Enabled**.
4. Click **Update** to save your changes.

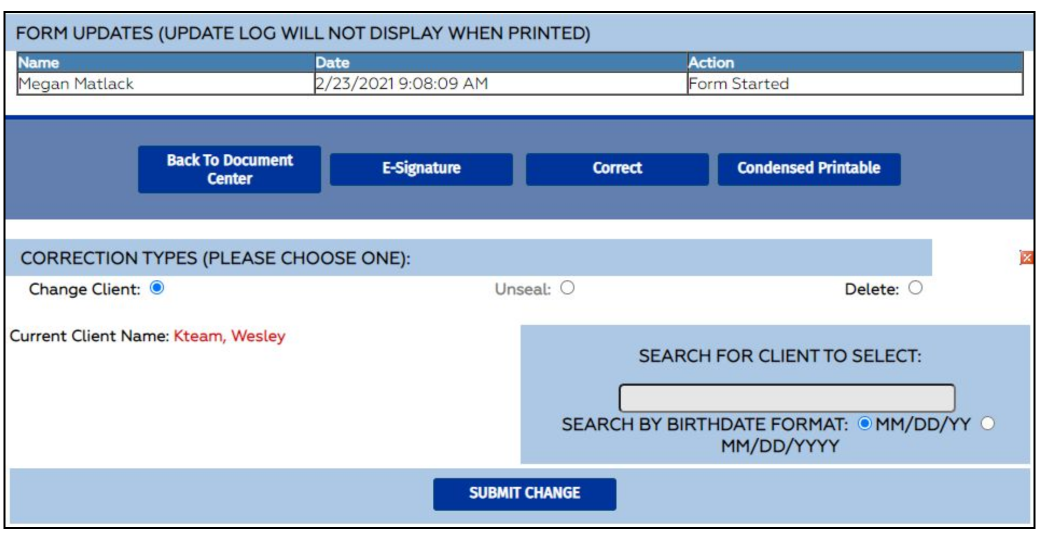


Making Corrections to Forms

Forms will, from time to time, require updating - Whether it be changing the associated client, unsealing the Form to make adjustments to the recorded information, or deleting the form altogether, being able to make these changes can prove very helpful. Here's how to change Forms that have been closed in NextStep:

Step by Step - Correcting Forms

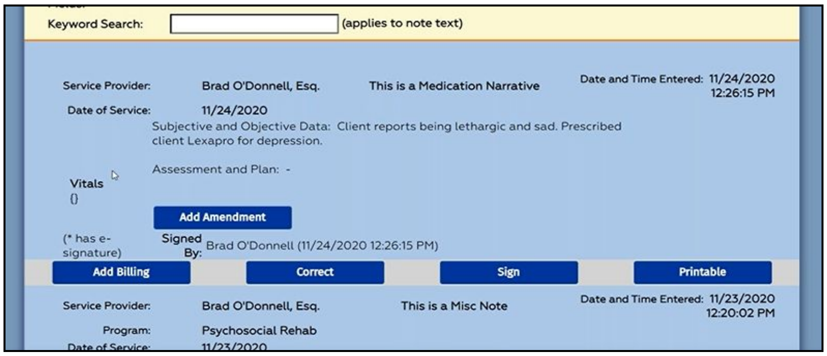
1. From the Main Menu, click **Document Center.**
2. Select the desired client, then select and open their case and the form in question.
3. Scroll to the bottom of the page to review available options.
4. To correct the form, click the **Correct** button, then choose from one of the following options:
    - **Delete** - If you delete the form, it will be removed from the case/client permanently.
    - **Change Client** - Allows you to associate the form with another client.
    - **Unseal** - This option permits you to update assessment and other form data, then **Sign/Seal** again once updates are complete. A reminder will appear on the Primary Clinician's Reminders List.
5. If updates are required for Billing:
    - If the form is billable, there will be an **Add Billing** option if billing information has not been added.
    - If there is billing information entered, there will be an option available to **Edit Billing**.



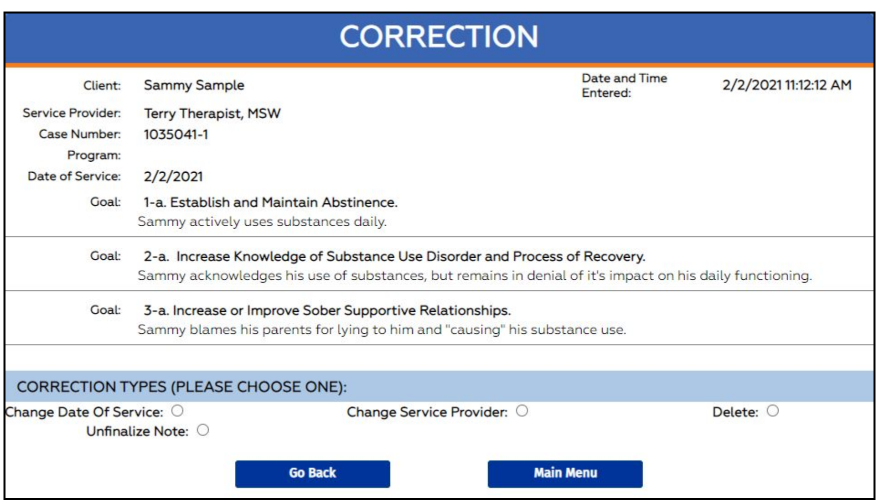
Making Corrections to Notes

As with Forms, Notes will require updating after they've been signed, closed, and/or sealed. Here's how to change Notes that have been closed in NextStep:

Step by Step - Correcting Notes



1. From the Main Menu, click **Document Center.**
2. Select the desired client, then select and open their case and **Select All Notes**, then find the specific Note.
3. There are options available and billing options that are reliant on previous billing information being entered.
4. To correct the form, click any of the following options:
    - **Add Amendment -** Adds an additional note to the existing one.
    - **Add Billing -** Adds billing information. If the Note has Billing information, this will show as **Edit Billing**.
    - **Correct -** Allows you to enter the note and edit anything requiring correction. Multiple options are available from within **Correct** to update different sections of the Note, as shown here:



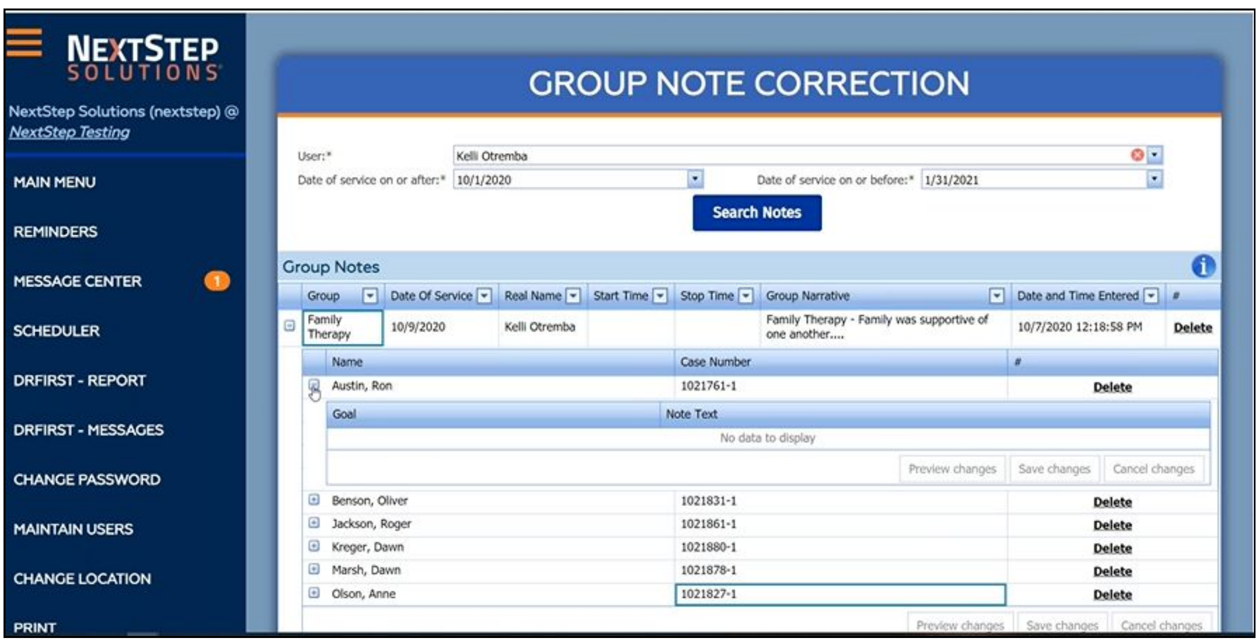
    - **Sign -** Confirms/Seals your provided changes.

Editing Group Notes

Similar though not identical to other types of notes, Group Notes require a couple of different steps to correct in NextStep Solutions. Here's how to edit them:

Step by Step - Editing Group Notes

1. From the Main Menu, navigate to **Admin Tools > Group Note Correction**.
2. Search for the **User** who documented the note, as well as a **Date Range**, then **Search Notes**.
3. To edit specific clients' details, click the **+** sign next to specific Group Notes to edit it.
4. Click the **+** again under specific names to edit the Note's content.
5. Place your edits, then click **Save Changes**.



Billing Considerations When Making Corrections

- If users edit billing information in notes or forms, and that service has not yet been sent as a claim to an insurance/payer, it updates information in the billing engine so no added action required.
- However, if a claim has already been sent regarding billing and you edit billing information in notes/forms, the billing data needs to be manually updated in the billing engine.
- To manage manual changes to billing:
    1. Navigate to **Main Menu > Admin Tools > Billing Tasks**.
    2. Review what has been processed in the **Billing Engine**.
    3. Change the status in the Billing Engine, return to **Billing Tasks**, and click **Mark Resolved**.