

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.

The screenshot shows the 'Maintain Users' interface in NextStep Solutions. The left sidebar contains a navigation menu with options like 'MAIN MENU', 'REMINDERS', 'MESSAGE CENTER', 'SCHEDULER', 'DRFIRST - REPORT', 'DRFIRST - MESSAGES', 'CHANGE PASSWORD', 'MAINTAIN USERS', 'CHANGE LOCATION', and 'PRINT'. The main content area is titled 'Process Permissions' and includes various settings for a user. The 'Correction enabled' checkbox is checked. Other visible settings include 'Sign Multiple Notes', 'Referral Source Management', 'Page Titles', 'Bed Setup', 'Billing Fees', 'Form Category Setup', 'Group Note Correction', 'Message Integrity', 'Dictionary of Terms', 'Ability To Pay Setup', 'Case Role Setup', 'Scheduler Profiles', 'Billing Tasks', 'NextStep Updates Changelog', 'Setup Variables & Setup Options', 'Scheduler Link', 'Manage Medication Packages', 'System Setup (Supplemental)', and 'Medication Titration Template Setup'. Below the permissions section, there is a 'LOCATIONS' section with a table of locations and a 'Remove' checkbox for each.

Remove	Location
<input type="checkbox"/>	Admin - Building Maintenance: Admin - Building Maintenance, 123 Main Street , Troy, Michigan 19702
<input type="checkbox"/>	Admin - Contract Provider Info: Admin - Contract Provider Info, 1234 Sunshine Blvd. , Orlando, Florida 50555
<input type="checkbox"/>	Admin - Human Resources: Admin - Human Resources 123 Somewhere , Auburn Hills, Idaho 12345

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**.

FORM UPDATES (UPDATE LOG WILL NOT DISPLAY WHEN PRINTED)

Name	Date	Action
Megan Matlack	2/23/2021 9:08:09 AM	Form Started

Back To Document Center
E-Signature
Correct
Condensed Printable

CORRECTION TYPES (PLEASE CHOOSE ONE):

Change Client: Unseal: Delete:

Current Client Name: Kteam, Wesley

SEARCH FOR CLIENT TO SELECT:

SEARCH BY BIRTHDATE FORMAT: MM/DD/YY MM/DD/YYYY

SUBMIT CHANGE

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

The screenshot shows a note entry form with the following details:

- Keyword Search:** (input field) (applies to note text)
- Service Provider:** Brad O'Donnell, Esq. **This is a Medication Narrative** **Date and Time Entered:** 11/24/2020 12:26:15 PM
- Date of Service:** 11/24/2020
- Subjective and Objective Data:** Client reports being lethargic and sad. Prescribed client Lexapro for depression.
- Assessment and Plan:** -
- Vitals:** ()
- Signed By:** Brad O'Donnell (11/24/2020 12:26:15 PM)
- Buttons:** Add Amendment, Add Billing, Correct, Sign, Printable

Below this note, another note is partially visible:

- Service Provider:** Brad O'Donnell, Esq. **This is a Misc Note** **Date and Time Entered:** 11/23/2020 12:20:02 PM
- Program:** Psychosocial Rehab
- Date of Service:** 11/23/2020

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:

The screenshot shows the **CORRECTION** interface with the following details:

- Client:** Sammy Sample **Date and Time Entered:** 2/2/2021 11:12:12 AM
- Service Provider:** Terry Therapist, MSW
- Case Number:** 1035041-1
- Program:**
- Date of Service:** 2/2/2021
- Goal:** 1-a. Establish and Maintain Abstinence. Sammy actively uses substances daily.
- Goal:** 2-a. Increase Knowledge of Substance Use Disorder and Process of Recovery. Sammy acknowledges his use of substances, but remains in denial of it's impact on his daily functioning.
- Goal:** 3-a. Increase or Improve Sober Supportive Relationships. Sammy blames his parents for lying to him and "causing" his substance use.
- CORRECTION TYPES (PLEASE CHOOSE ONE):**
 - Change Date Of Service:
 - Unfinalize Note:
 - Change Service Provider:
 - Delete:
- Buttons:** Go Back, Main Menu

- **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**.

GROUP NOTE CORRECTION

User: * Kelli Otremba
 Date of service on or after: * 10/1/2020 Date of service on or before: * 1/31/2021
 Search Notes

Group	Date Of Service	Real Name	Start Time	Stop Time	Group Narrative	Date and Time Entered	#
Family Therapy	10/9/2020	Kelli Otremba			Family Therapy - Family was supportive of one another....	10/7/2020 12:18:58 PM	Delete

Name	Case Number	#
Austin, Ron	1021761-1	Delete
Benson, Oliver	1021831-1	Delete
Jackson, Roger	1021861-1	Delete
Kreger, Dawn	1021880-1	Delete
Marsh, Dawn	1021878-1	Delete
Olson, Anne	1021827-1	Delete

Goal Note Text
 No data to display

Preview changes Save changes Cancel 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**.

BILLING TASKS

Unresolved Resolved

	Reason	Case #	User	Date of Service	Activity Code
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021689	NextStep Solutions	3/9/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021687	NextStep Solutions	3/2/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021505	NextStep Solutions	2/27/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021683	NextStep Solutions	2/25/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021298	NextStep Solutions	2/25/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021663	NextStep Solutions	2/18/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021682	NextStep Solutions	2/5/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021298	NextStep Solutions	2/4/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021298	NextStep Solutions	2/4/2020	
Mark Resolved	Cannot change service because it has been processed in the billing engine, needs to be resolved manually (Service ID:)	1021679	NextStep Solutions	1/29/2020	

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