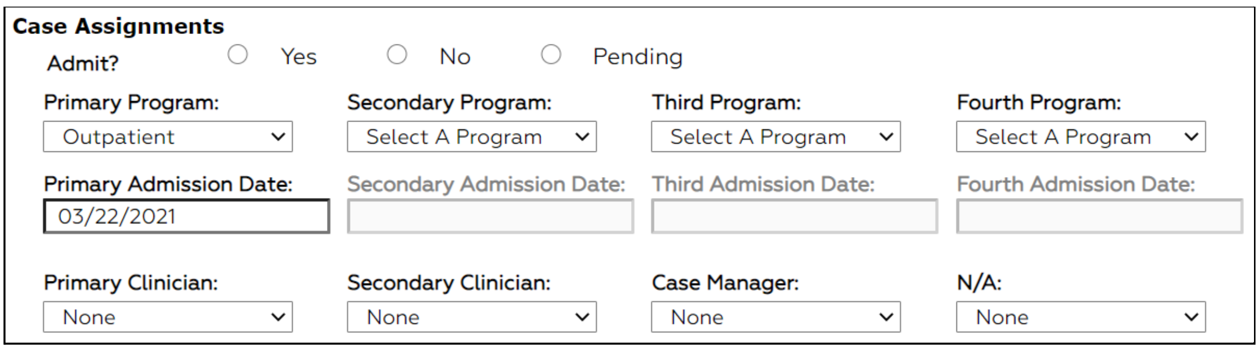
Reminders List QRG

Remembering What You Need To Do With Reminders

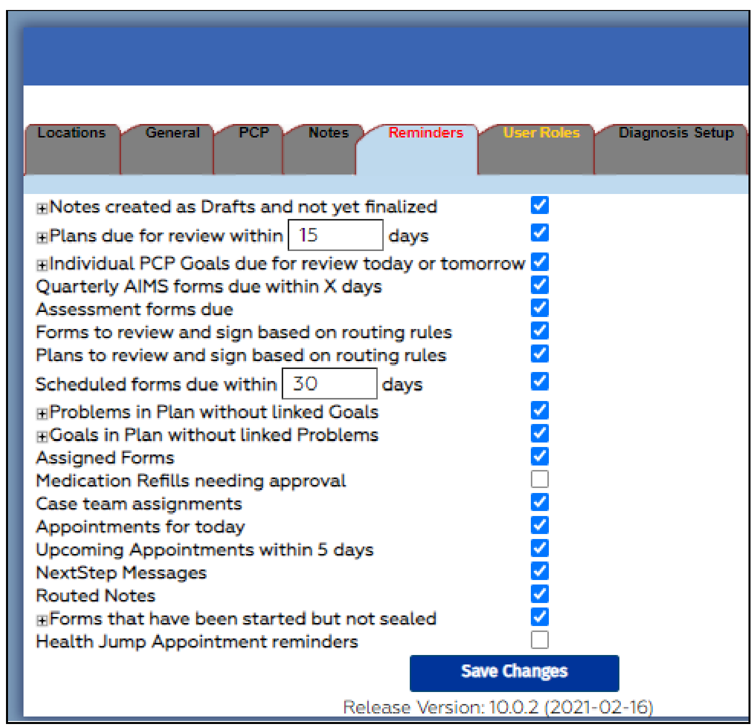
A **Reminders** list pops up automatically each time you log into NextStep and displays reminders based on your case assignment role and some setup considerations. Reminders are categorized by headings such as Initial assessments due, Case Assignments, Messages, etc. The Reminders list can be accessed at any time by clicking Reminders in the left navigation menu.

Your **Case Assignment**, as part of the Face Sheet, will play a major role in the Reminders you receive:



Setting Up Reminder Headings

1. Navigate to **System Setup**: **Admin Tools > System Setup**.
2. Select the **Reminders** tab.
3. Alter/update settings as desired by your agency. These include, but are not limited to notes, signatures, messages, PCP Goals and forms.
4. Click **Save Changes** once your changes have been made, or click **Main Menu** to abandon changes and return to the Main Menu.



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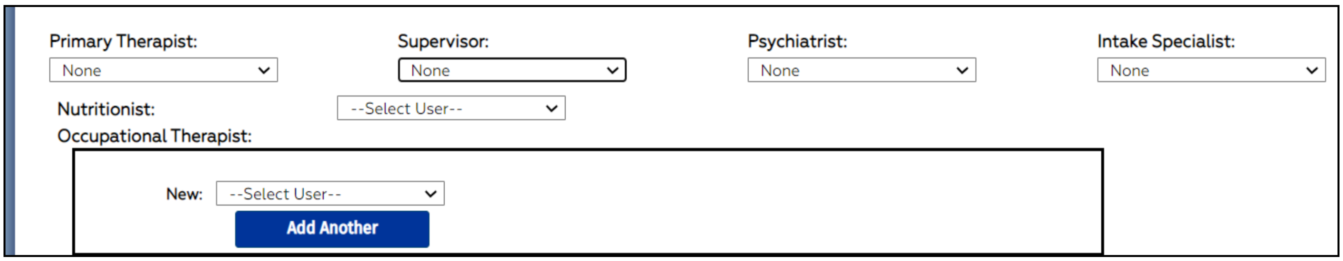
Case Assignment Names and Options

Although new roles can be added in **Case Role Setup**, the field name titles for the Face Sheet Case Assignments must be changed by your NextStep Implementation Specialist:

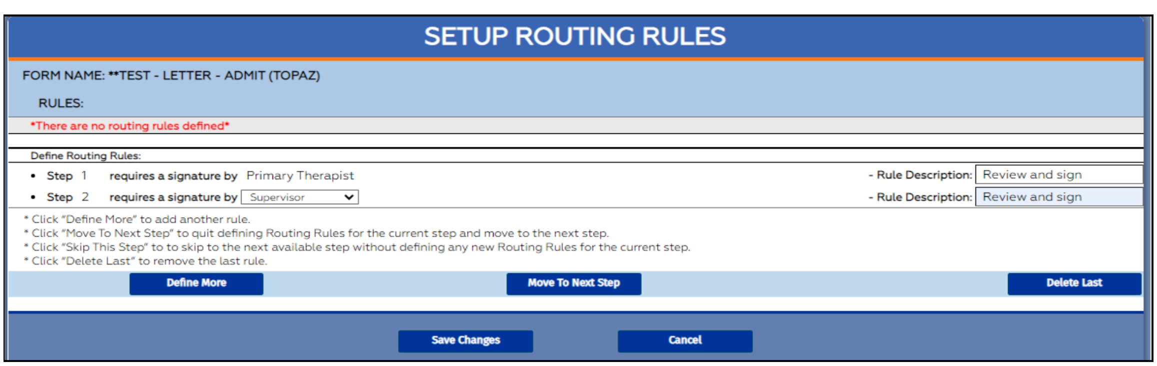


Setting Up Routing Rules

Routing Rules are another option which can be used as a form of reminder or workflow to assign documents from one individual to another for review and signatures. These rules can vary from agency to agency, as each agency must consider who should get the first reminder/prompt to complete a form and where the form(s) need to be routed next. Setting them up, however, stays the same :

Setting Up Routing Rules

1. Navigate to **Setup Routing Rules**: **Admin Tools > Form Setup/Builder** > **Setup Routing Rules.**
2. Click **Add Rules** to begin creating a new rule.
3. Identify the first staff person/role the form goes to for completion in the dropdown menu.
4. Click **Define More** and repeat step 3 to identify more roles to route to.
5. Click **Save Changes** to confirm.



Assigning/Routing Notes

In NextStep Solutions, there are no automatic routing rules for notes but they can be assigned to staff either individually or to multiple staff prior to signing and sealing. Here's how you can make sure your notes get to the intended parties :

Assigning/Routing Notes

1. Navigate to any note type: **Progress Notes** > **Desired Type of Note**.
2. Scroll to the bottom of the note to the **Note Routing** section.
3. Perform one of the following:
    - Click one of the recipients.
    - Hold **CTRL** and click multiple recipients.
4. Select either **Enter Note (Draft)** to save the note for future completion or **Enter Note (Final)** to sign and seal the client's note.