

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:

Case Assignments Admit? O Yes O No O Pending								
Primary Program:	Secondary Program:	Third Program:	Fourth Program:					
Outpatient 🗸	Select A Program 🗸	Select A Program 🗸 🗸	Select A Program 🗸					
Primary Admission Date: 03/22/2021	Secondary Admission Date:	Third Admission Date:	Fourth Admission Date:					
Primary Clinician:	Secondary Clinician: None V	Case Manager: None V	N/A: None					

Setting Up Reminder Headings

- Navigate to System Setup: Admin Tools > System Setup.
- 2. Select the **Reminders** tab.
- 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:

Primary Therapist:	Supervisor:	Psychiatrist:	Intake Specialist:
None 🗸	None 🗸	None 🗸	None 🗸
Nutritionist:	Select User 🗸		
Occupational Therapist:			
Occupational Therapist:			
Nour Select II			
New:Select 0	ser 👻		
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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.

SETUP ROUTING RULES							
FORM NAME: **TEST - LETTER - ADMIT (TOPAZ)							
RULES:							
There are no routing rules defined							
Define Poutine Pular:							
Step 1 requires a signature by Primary Therapist	- Rule Description: Review and sign						
Step 2 requires a signature by Supervisor	- Rule Description: Review and sign						
 Click "Define More" to add another rule. Click "Move To Next Step" to quit defining Routing Rules for the current step and move to the next step. Click "Skip This Step" to to skip to the next available step without defining any new Routing Rules for the current step. Click "Delete Last" to remove the last rule. 							
Define More Move To Next Step	Delete Last						
Save Changes Cancel							





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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.

NOTE ROUTING:						
Route Note To:	avaughn Conference Room					
	Dee Fernandez Erin Rondon hgarrett					
	Insurance Eight Insurance Five Insurance Four					
	Insurance Nine Insurance One (you can select more	▼ than one user by holding dow	n the Ctrl key - to select a	sequence of users hold down the S	hift key)	
Comment (optional):						
Ente	r Note (Draft)		Enter Note (Final)		Main Menu	

