NextStep Solutions
Moving Behavioral Health Forward

Administrator + Superuser:
Form, Note, Treatment Plan, & Header Setup QRG

Form Builder

The Form Builder in NextStep allows you to build a Form from scratch, modify Forms, duplicate Forms, and associate Forms to Locations and Programs. Any changes made to Forms via the Form Builder option affect all users accessing the Form in question.

Add a New Form

1. Navigate to the Form Builder: **Main Menu > Admin Tools Menu > Form Builder**.
2. Click the **Add New Form** button. The User Defined Forms page opens.
3. In the **Form Name** field, enter the name of the Form you're adding.
4. In the **Form Alias** field, enter an alias for the Form.
5. Select the **checkboxes** for options that start with "Show…" to include information pulled from the Face Sheet in the Form. Options located toward the bottom of the page can also be selected to add additional details to the Form. Refer to the on-screen descriptions for details on what each checkbox adds to the Form.
6. Click the **% Form Type** drop-down and select a Form Type from the list below. This cannot be changed after the Form is added.
   - **Scheduled Forms**: These Forms have a due date that resets every time the Form is filled out. Often, Scheduled Forms are sister Forms of Assessment Forms. For example, a Consent for Treatment might be due at admission (Assessment Form) and then completed annually (Scheduled Form). Other examples include PHQ-9, GAD-7, and more.
   - **Unscheduled Forms**: These Forms can be filled out for a client at any time. Unscheduled Forms do not have a due date, are not required, and can be filled out as often as needed.
   - **Discharge Forms**: These Forms are completed at discharge. Once signed/sealed, the client is discharged and no further work can be done on that client.
   - **Transfer Forms**: These Forms are the Forms of record for client Program transfers. Editing a Program on the Face Sheet automatically creates a Transfer Form which is stored in the Document Center.
   - **Assessment Forms**: These are required, one-time Forms and have a due date.

- **Pre-Admit Forms/Intake Forms**: These Forms are completed prior to a client's Program admission; once admitted, Pre-Admit Forms cannot be completed for a given client.
- **Follow-Up Forms (After Discharge)**: These Forms are used once a client is discharged and no more work can be done on that client.

7. Click the **Add** button.

Add Fields to a Form

1. In Form Builder, use the **Select Form** drop-down and select a Form.
2. Click the **Add New Field** button located at the bottom of the page. The User Defined Forms page is displayed.
3. In the **Field Name** field, enter a name for the field. This is what the user or client sees on the Form.
4. *(Optional)* In the **Internal Notes Only** text box, enter internal notes about the field.
5. *(Optional)* Click the **Add New Alias** button, enter an alias, and then click the **Add This Alias** button to create and apply an alias for the field. The Alias Field Name **should not** contain spaces or special characters.
   Note: The Alias is a unique identifying name for this field. For example, if there were multiple fields in the Form called Comments, you would want to add an alias to differentiate them from one another based on what they should be used for, such as CommentsHealth, CommentsPsychoSocial, etc.
6. *(Optional)* In the **Prompt** field, enter the text that will be displayed in italics next to the field/question to give directions to the user/client.
7. *(Optional)* Select the **Print Prompt** checkbox if you'd like for the field prompt to be displayed when printing the Form.
8. Click the **Type** drop-down and select the type of field you'd like to add, such as text, drop-down, date, etc.
   Note: Once the Field Type is selected, the options displayed below the Type drop-down may change.
9. Click the **Location** drop-down and select the order in which you want the field to be displayed on the Form.
10. *(Optional)* Select the **Required** checkbox to make this field required. Marking a field as required means that you will **not** be able to seal the Form until the field is completed.
11. *(Optional)* Select the **Disable Print** checkbox if you don't want this field displayed when this Form is printed.
12. Complete any other fields as necessary depending on the type of field you've selected to add to the Form.
13. *(Optional)* Click the **Add New Field Reference** button if this field will pull a data point from one Form to another. In general, it's best to eliminate a Form question if it has already been asked elsewhere. Sometimes though, a question needs to be answered on two or more Forms. There are two types of Field References: above-box referencing and autofill referencing.

a. **Above-box Referencing**: The data is displayed as blue text above the entry box for the question/field you are viewing. This is useful if you want to know what has been entered as data before but don't want it displayed in the field itself.

    i. Click the **Form** or **Note** and **Field** drop-downs and select the Form or Note and Field you want to reference.

    ii. **Do not** select the **Fill Field** checkbox.

    iii. Click the **Add This Field Reference** button.

b. **Autofill Referencing**: The data is displayed directly in the field.

    i. Click the **Form** or **Note** and **Field** drop-downs and select the Form or Note and Field you want to reference.

    ii. Select the **Fill Field** checkbox.

    iii. Click the **Add This Field Reference** button.

    Note: If users change the referenced text in the field, it does not change that same text on the Form you are referencing. Form A (Referenced Form) flows to Form B (Referencing Form), not the other way around.

14. Click the **Add This Field** button.

Attach Forms to Programs and Locations

Forms are only visible to a Clinician if the client they are treating is in **both** the Program and Location of a given Form (with the exception of Pre-Admit/Intake Forms). For example, Clinicians treating clients in an Outpatient-only Program will never see Forms for clients who are in the Residential Program. By attaching a Form to Programs and Locations, it becomes a live Form and can be accessed by Clinicians.

1. In the Form Builder, use the **Select Form** drop-down to select a Form.
2. Click the **Edit This Form** button located at the bottom of the page.
3. To:
   - **Attach Form to Programs**:
     a. Click the **Programs using this Form** button located at the bottom of the page.
     b. Select the **Program(s)** you want to attach the Form to.
     c. Click the **Save Changes** button.
   - **Attach Form to Locations**
     a. Click the **Locations using this Form** button located at the bottom of the page.
     b. Select the **Location(s)** you want to attach the Form to.

   c. Click the **Save Changes** button.

Edit Form Fields/Questions

1. In the Form Builder, use the **Select Form** drop-down to select a Form.

2. In the Fields section of the page, select the **checkbox** next to the Field you want to edit.

3. Click the **Edit Selected Field** button.

4. Edit the field as necessary.

5. Click the **Update This Field and Return** button.

Edit Existing Form Properties

In the Form Builder, use the **Select Form** drop-down to select a Form. The Form's Properties are displayed in the top section of the page.

1. Click the **Edit This Form** button located at the bottom of the page.

2. Make edits as necessary.

3. Click the **Update** button.

Duplicate a Form

Duplicating a Form gives you the ability to create a new Form by starting with a copy of an existing Form and making changes as needed.

1. In the Form Builder, use the **Select Form** drop-down to select a Form.

2. Click the **Edit This Form** button located at the bottom of the page.

3. Click the **Duplicate Form** button located at the bottom of the page. The Duplicate Form page is displayed.

4. In the **Form Name** field, remove the "Copy of…" text and enter a Form name.

5. Click the **Form Type** drop-down and select a Form Type.

6. Click the **Submit** button.

7. Make edits as necessary and click the **Update** button.

Form Routing Rules Setup

Routing Rules can be set up for Forms so that the Form requires signatures from specific people or teams. For multi-user Case Roles, you can enable functionality to allow for a single user's signature to fulfill the Routing Rule for the entire Case Role. For example, if the Nursing Team contains person A, person B, person C and person C signs the Form, the Routing Rule has been fulfilled for the Nursing Team). Contact NSS Support and reference setup variable: *MultiUserCaseRoleFormRouting* to enable this functionality.

1. Navigate to the Form Builder: **Admin Tools** > **Form Builder**.

2. Click the **Select Form** drop-down and select a Form.

3. Click the **Edit This Form** button located at the bottom of the page.

4. Click the **Setup Routing Rules** button located at the bottom of the page.

5. Click **Add** button ＋ .

6. In the **Step** field, enter a number or use the up and down arrows to select a number.

7. Click into the **Requires Signature By** field and use the drop-down to select a Role.

   Note: If *MultiUserCaseRoleFormRouting* is enabled and you select one of the Team Case Roles for sign-off, only one person from the team will need to sign to fulfill that Routing Rule.

8. *(Optional)* Click into the Rules Description field and enter a description for the rule.

9. Repeat as necessary to add additional Routing Rules.

10. Click the **Save Changes** button.

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Note Builder

Add, Edit, and Discontinue Fields

1. Navigate to the Note Builder: **Main Menu > Admin Tools Menu > Note Builder**.

2. Click the **Select Note Type** drop-down and select a Note Type.

3. To:

   - **Add a new field**:

     a. Click the **Add New Field** button.

     b. In the **Field Name** field, enter a name for the field. This is what the user sees on the Note.

     c. *(Optional)* In the **Internal Notes Only** text box, enter internal notes about the field.

     d. *(Optional)* Click the **Add New Alias** button to create and apply an alias for the field. The Alias Field Name **should not** contain spaces or special characters.

     e. In the **Prompt** field, enter the text that will be displayed in italics next to the field/question to give directions to the Clinician.

     f. From the **Type** drop-down, select the Field Type you want to add.

     g. Fill out the appropriate fields for the Field Type.

     h. Click the **Add This Field** button.

   - **To edit a field**:

     a. Select the checkbox for the field you want to edit.

b. Click the **Edit Selected Field** button.

c. Make edits as necessary.

d. Click the **Update This Field and Return** button.

- **To discontinue a field**:

a. Select the checkbox(es) for the field(s) you want to discontinue.

b. Click the **Discontinue Selected Fields** button.

Edit Activity Codes Available for Billing

1. Navigate to the Note Builder: **Main Menu > Admin Tools Menu > Note Builder**.

2. Click the **Select Note Type** drop-down and select a Note Type.

3. Click the **+** to expand **Activity Codes Available for Billing**.

4. Select the **ALL ACTIVITY CODES (including new ones)** checkbox to display all Activity Codes as options for selection in the billing box for this Note type or select **individual** checkboxes for the codes you want to make available.

5. Click the **Update Activity Code Settings** button at the bottom of the grid.

Group Note Configuration

1. Navigate to the Note Builder: **Main Menu > Admin Tools Menu > Note Builder**.

2. Click the **Select Note Type** drop-down and select **Group Note**.

3. Click **+** to expand **Group Note Configuration** located above the Fields section.

4. In the **General Configuration** section, select the checkbox(es) for the functionality you want to enable for your Agency:

- **Enable Billing for Group Notes**: When selected, the Billing widget is displayed in the Group Note for each client in the Group.

- **Enable Group Note Autoload**: When selected, each client's Group Note is automatically loaded upon selecting the Group.

- **Enable Schedule for Group**: When selected, a schedule is displayed so that you have a visual cue as to when the Group typically meets.

- **Enable Count for Group**: When selected, a section called Group Counts is displayed and contains information on overall capacity, client count, and remaining spots left in the group.

5. In the **Client Search Details** section, select the radio button for the details you'd like displayed after the client's first name and last name when searching for a client in a Group Note:

- **No Additional details**: No additional details are displayed, only the client's first and last name.

- **Date of Birth**: Displays the date of birth after the client's first and last name.
- **Case #**: Displays the case number after the client's first and last name.

6. Click the **Update Configuration** button.

Medication Plan Note Configuration

1. Navigate to the Note Builder: **Main Menu > Admin Tools Menu > > Note Builder**.
2. Click the **Select Note Type** drop-down and select **Medication Narrative**.
3. Click **+** to expand **Medication Plan Note Configuration** located above the Fields section.
4. In the **General Configuration** section, select the checkboxes for the functionality you want to enable for your Agency. .
5. In the **SOAP Narrative** section, select the checkboxes for the functionality you want to enable for your Agency.
   Note: If you've enabled one of both fields, select the **Require** checkboxes if you want to mark these as required fields for your users.
6. *(Optional)* In the SOAP Narrative section, enter a **Prompt** for your Clinicians for the fields you've enabled.
7. Click the **Update Configuration** button.

Treatment Plan Setup

Edit Treatment Plan Template Setup

1. Navigate to Treatment Plan Template Setup: **Main Menu > Admin Tools Menu > Treatment Plan Template Setup**.
2. Select the radio button next to the option you want to edit (Add/Edit Outcomes, Add/Edit Goals, Edit Objectives, Add/Edit Interventions, Add/Edit Programs).
3. Click the **Continue** button.
4. Click the drop-down to select an Outcome, Goal, Objective, Intervention or Program depending on the radio button selected in Step 2.
5. Click the **Edit** button.
6. Make edits as necessary.
7. Click the **Save Changes** button.

Treatment Plan Routing Rules

Creating a Routing Rule allows your Agency to define the sequence of Case Assignment signatures on the Treatment Plan.

1. Navigate to PCP Routing Rules Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > PCP Section**.

2. Click the **New** button to add a new Rule Step.

3. Use the **Case Role** drop-down to select a Case Role.

4. Click into the **Rule Step** field and enter a number or use the up or down arrow to select a number.

5. Click into the **Description** field, and add a note to describe the rule.

6. Repeat as necessary to define more rules.

7. Click the **Save Changes** button.

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Header Setup

The Header is what is displayed at the top of a page within NextStep.

Create, Edit, or Delete a Header

1. Navigate to Header Setup: **Main Menu > Admin Tools Menu > Header Setup**.

2. To:

- **Create a new Header**:
    a. Click the **Add New Header** button.
    b. Enter a unique name for the Header.
    c. Click the **Submit** button.
    d. Click the **Add Field** button and complete the appropriate fields.
    e. Click the **Save Field** button.
    f. Repeat as necessary.
    g. Click the **Return to Header Setup** button when finished.

- **Edit an existing Header**:
    a. Use The **Select Header** drop-down to select the Header you want to edit.
    b. Click the **Edit Selected Header** button.
    c. Add, edit, and/or delete fields as appropriate.

  d. Click **Return to Header Setup** when finished.

- **Delete an existing Header**:

  a. From the **Select Header** drop-down, select the Header you want to delete.

  b. Click the **Delete Selected Header** button.

Assign Which Header is Displayed for a Page

1. Navigate to Header Setup: **Main Menu > Admin Tools Menu > Header Setup**.

2. In the Page column, locate the page you want to assign a header to.

3. Click the **Header** drop-down associated with the page, and select a Header.

4. Click the **Update Assignments** button.