Residential QRG

In some Agencies, a client in your care may be transferred from an Outpatient setting to a Residential facility. NextStep Solutions allows you to assist your client in their care journey, from the transfer itself, to bed assignment, and more.

Transfer a Client to a Residential Program

When the decision has been made to transfer a client into Residential care from your Outpatient Agency, the client must be moved from one location to the other. Unlike other Outpatient locations, clients must be transferred into Residential locations.

1. Navigate to the Face Sheet: **Main Menu > Admissions Menu > Face Sheet**.
2. Search for and select the client.
3. Click the **Edit** button.
4. In the Case Assignments section:
   a. Click the **Primary Program** drop-down and select the appropriate Residential Program.
   b. Click the calendar in the **Admission Date** field and select the Admission date and time.
   c. *(Optional)* Select the staff assigned to the client's Case from the drop-down(s).
   d. Click the **Update** button.

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Assign and Manage Client Beds

The Bed Management feature allows you to make sure that a bed is available for the client in the Residential setting, assign the client to a bed or to a waitlist, and move them as needed.

Assign a Client to a Bed

1. Navigate to Bed Management: **Main Menu > Admissions Menu > Bed Management**.
2. Search for and select the client if not already displayed.
3. Add the client's bed information.

a. Click the **Building** drop-down and select a Building.

b. Click the **Room No** drop-down and select a Room.

c. Click the **Bed** drop-down and select a Bed.

d. In the **Start Date** field, click the calendar and select a date and time the client will begin to occupy the bed.

e. *(Optional)* In the **Number of Days Allowed in Bed** field, enter a number.

f. Click the **Add This Record** button.

g. Click the **Submit** button.

Note: If you select a bed that is occupied, a warning message will display asking you to confirm that you would like to remove the current client occupying the bed out of the bed. Click **Cancel** or **Yes**.

Add a Client to Waitlist for a Bed

1. Navigate to Bed Management: **Main Menu > Admissions Menu > Bed Management**.

2. Search for and select the client if not already displayed.

3. Click the **Waitlist** button.

Note: To assign the client to a General Waitlist you do not need to select a Building, Room, and Bed.

a. Click the **Building** drop-down and select a Building.

b. Click the **Room** drop-down and select a Room.

c. Click the **Bed** drop-down and select a Bed.

d. In the **Start Date** field, click the calendar and select a date and time.

e. *(Optional)* In the **Notes** field, enter a note.

f. Click the **Add to Waitlist** button. The Bed Management page is displayed showing that the client is on a Waitlist.

Note: To see when a bed is available, pull up the reports described in the Review Residential Reports section below.

Remove a Client from Waitlist for a Bed

1. Navigate to Bed Management: **Main Menu > Admissions Menu > Bed Management**.

2. Search for the client if not already displayed.

3. Click the **Waitlist** button.

4. Click the **Remove from Waitlist** button.

5. Click the **Yes** button.

Update Client Waitlist for a Bed

1. Navigate to Bed Management: **Main Menu > Admissions Menu > Bed Management**.

2. Search for the client if not already displayed.

3. Click the **Waitlist** button.

4. Make necessary changes to the **Building, Room, Bed, Start Date, or Notes** field.

5. Click the **Update Waitlist** button.

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Review Residential Reports

The following Residential Reports, (**Main Menu > Reports Menu > Reports**), are used to keep track of bed statuses and waitlists for beds.

- **Residential Roster:** This report is organized by Building and shows a list of Rooms and Beds with their occupants. Empty beds are also displayed in the list without a client listed. This report can be exported or PDFed.

- **Bed Waitlist:** This is a searchable report that shows which clients are on the Waitlist for a specific Building and Bed and which clients are on a General Waitlist for any bed to be available. This report can be exported to Excel or to PDF.

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Complete Checklists

Checklists are used to electronically keep track of rounds and bed checks for clients in Residential facilities. Checklists can be viewed by Client, Block, or Building, depending on your Agency's setup.

1. Navigate to Bed Checks and Checklists: **Main Menu > Progress Notes Menu > Bed Checks and Checklists**.

2. Click the **Open** button next to the Checklist you want to open.

3. Complete the Checklist using one of the following methods based on your Agency's setup:
   - **Checklist by Client:** Select the client's tab to view their Checklist.
     a. *(Optional)* If a client is not displayed as a tab:
        i. Click in the **Client Search** field, enter the client's name, and select from the list.
        ii. Click the **Add Tab** button.
   - **Checklist by Block:** Click the **Building** or **Block** drop-down to make your selection, and click the **Open Building** button. A list of clients in that building for a specific time block are displayed.
   - **Checklist by Building:** Click the **Building** drop-down to select a Building, and click the **Open Building** button. The clients located in that building are displayed in their own tabs.

4. The **Date of Service** field is auto-populated with today's date.

5. Complete the appropriate fields on the Checklist.

6. Select one of the following options.
    - **Preview Changes**: Allows you to preview changes made to the Checklist.
    - **Save Changes**: Saves the changes made to the Checklist.
    - **Cancel Changes**: Cancels the changes made to the Checklist.
7. Click the **Seal Checklist** button and enter your password to seal the Checklist.

Census Billing for Residential Facilities

Residential clients are billed on a per diem basis via NextStep's Census Billing. By entering the building and date of service for each client, you can bill that building's clients all at once.

1. Navigate to Census Billing: **Main Menu > Progress Notes Menu > Census Billing**.
2. Click the **Buildings** drop-down to select a Building.

   Note: The Census Billing can be configured to display a listing of clients based on their Location rather than their Residential building. To enable this functionality, contact Support and reference the *LocationBasedCensus* setup variable.
3. Click into the **Date of Census** field and either end the date or select from the calendar. The Building's list of clients on that date are displayed.

   Note: The day captures data from 12:00 AM - 11:59:59 PM for the date selected.
4. Depending on your Agency's payer requirements for billing and how your Agency is set up, you may only see some of the Billing Box fields displayed. The columns you may see are: **Units, Stop time, Start time, Service Location, Rendering Provider, Program, DSM-V Diagnosis, and Authorization**. Fill in the appropriate fields as required by your Agency:
    - Click the **All Clients** drop-down(s) and make a selection to populate that option for all clients.
    - Click the drop-down for the specific client's row and select the appropriate option.

      Note: The Diagnosis field defaults to a client's primary diagnosis if the client only has one diagnosis.
5. Click the **Seal Census** button and enter your password. The data is sent to the Billing Engine.

Document in Care Logs

In a Residential setting, a client's Activities of Daily Living (ADLs) and progress are documented using Care Logs.

Document in Care Logs

1. Navigate to Progress Notes: **Main Menu > Progress Notes Menu > Care Logs**.
2. Search for and select the client if not already displayed.

3. The **Care Log Date** field defaults to the current date. Select a different date if needed.

4. *(Optional)* To document information for a specific Shift, deselect the **Display Shift** checkbox(es) for the Shift(s) you do not want to view.

5. Click **+** to expand the Care Log you want to use.

6. Fill in the appropriate fields as required by your Agency.

    Note: If you've previously completed a Care Log for the client, it will be displayed to the left of the current Care Log. Click the **Replicate Previous** button under a specific Shift to enter in the same responses as the previous day.

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

Run Care Log Report

1. Navigate to Progress Notes: **Main Menu > Progress Notes Menu > Care Logs**.

2. Click the **Care Log Reports** button.

3. Search for and select the client if not already displayed.

4. Select a **Start** and **End Date**.

5. Click the **Load Reports** button to display all Care Logs between the two dates.

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Discharge Client from Residential

When the client is ready to be discharged, you will discharge the client from the bed and facility.

1. Navigate to Bed Management: **Main Menu > Admissions Menu > Bed Management**.

2. Search for the client if not already displayed.

3. Click the **Discharge From Bed** button.

4. In the Discharge From Bed window:

    a. *(Optional)* Enter a **transfer/discharge** reason.

    b. Click into the **Date/Time** field and enter the date and time that the client was transferred/discharged from the bed or select a date and time from the calendar.

    Note: You cannot select a discharge date in the future.

5. Click the **Submit** button.

    Note: This only discharges the client from the Bed and not from your Agency. If you discharge a client with Full Case Closure instead, the client is automatically discharged from the bed and you are unable to document any further information for this client.

6. Navigate to the Face Sheet **(Main Menu from the Navigation Menu > Admissions Menu > Face Sheet)**.

7. Click the **Edit** button.

8. In the Case Assignment section, click the **Primary Program** drop-down and update the Program.

   Note: This is typically where you would change the Program back to an Outpatient Program.

9. Click the **Update** button.