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Forms can be configured to your Agency's workflow within NextStep to replace paper Forms that your Agency uses. All Forms, with the expectation of Pre-Admit and Follow-Up Post-Discharge Forms, can be associated with a Program and Location. Forms may be routed to other users to be completed via the Face Sheet or assigned to you, appearing in your Reminders List. Once Forms are signed and sealed, they are viewable in the Document Center.

## Pre-Admit Forms

Pre-Admit Forms are completed when the client has a Pending Admit status on the Face Sheet and has not been admitted to a program. These Forms can only be completed once and when the client is admitted to a program, all Pre-Admit Forms are signed and sealed and are no longer accessible.

1. Navigate to Pre-Admit Forms: **Main Menu > Admissions Menu > Pre-Admit Forms.**
2. Search for and select the client. All Pre-Admit Forms are displayed.
3. In the Choose Form section, select the **radio button** for the specific Form.  
**Note:** In the Form Status section, all Forms will show as Not Yet Started until you select a Form and click the Open Form button.
4. Click the **Open Form** button.
5. Complete the appropriate fields on the Form. All fields with an asterisk are required.
6. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.

**Note:** After a Form is Sealed, the Form will be grayed out and in the Form Status section, a status of "Started on [Date], Sealed on [Date]" is displayed.

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## Assessment Forms

Assessment Forms are Forms that are scheduled to be filled out at a specific time during the client's treatment. These Forms can only be completed once and are generally completed within a certain time frame from the client being admitted to a program.

1. Navigate to Assessment Forms: **Main Menu > Clinical Forms Menu > Assessment Forms.**
2. Search for and select the client.
3. *(Optional)* Click the **Heading name** to expand the Heading section(s) and display the available Forms.
4. The Assessment Forms assigned to the client are displayed. In the Choose Form section, select the **radio button** for the specific Form.

**Note:** In the Form Status section, all Forms will display a Due Date and show as Not Yet Started until a Form is selected and the Open Form button is clicked.

5. Click the **Open Form** button.
6. Complete the appropriate fields on the Form. All fields with an asterisk are required.
7. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.

**Note:** After a Form is Sealed, the Form will be grayed out and a Form Status of "Due on [Date], Started on [Date], Sealed on [Date]" is displayed.

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## Scheduled Forms

Scheduled Forms are Forms that need to be filled out at specific times during the client's treatment. Once completed, the due date resets for the Form so that each Scheduled Form may be completed multiple times.

1. Navigate to Scheduled Forms: **Main Menu > Clinical Forms Menu > Scheduled Forms.**
2. Search for and select the client.
3. *(Optional)* Click the **Heading name** to expand the Heading section(s) and display the available Forms.
4. The Scheduled Forms assigned to the client are displayed. In the Choose Form section, select the **radio button** for the specific Form.

**Note:** In the Choose Form section, the Title of the Form and how often the Form is scheduled to be completed displays. In the Form Status section, all Forms will display a Due Date and show as Not Yet Started until a Form is selected and the Open Form button is clicked.

5. *(Optional)* Click the **Change Due Date** button to enter a new due date for the specific Form.

6. Click the **Open Form** button.
7. Complete the appropriate fields on the Form. All fields with an asterisk are required.
8. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.

**Note:** Once a Form has been completed, the due date will automatically update to show the next date the Form should be completed by.

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## Unscheduled Forms

Unscheduled Forms are Forms that are assigned to clients that can be completed multiple times with no due date.

1. Navigate to Unscheduled Forms: **Main Menu > Clinical Forms Menu > Unscheduled Forms**.
2. Search for and select the client.
3. *(Optional)* Click the **Heading name** to expand the Heading section(s) and display the available Forms.
4. The Unscheduled Forms assigned to the client are displayed. In the Choose Form section, select the **radio button** for the specific Form.

**Note:** In the Form Status section, all Forms will show as Not Yet Started until you select a Form and click the Open Form button.

5. Click the **Open Form** button.
6. Complete the appropriate fields on the Form. All fields with an asterisk are required.
7. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.

**Note:** All Sealed Forms are displayed under the Sealed Forms section at the bottom of the page. Click the Title of the Form to view the Form details.

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## Weblink Inbox - Attach Forms

Weblink Inbox - Attach Forms display a list of all external Forms that clients submitted by the Agency's Web Link. Web Links allow clients to complete Forms without having to be present at your Agency and are independent of the Client Portal. The Forms can then be attached to the client in NextStep and will show in the Document Center.

1. Navigate to Weblink Inbox - Attach Forms: **Main Menu > Clinical Forms Menu > Weblink Inbox - Attach Forms**.
2. In the Form Name column, click the Form Name to open the Form.

3. Review the information that the client added to the Form, and click the **Attach To Client** button.

**Note:** The Form cannot be edited at this time.

4. Search for and select the client.
5. Determine if you would like to sign and seal the Form.
  - To Sign and Seal the Form, type your Password in the **Password** field.
  - Deselect the **Seal This Form?** checkbox if you do not want to Sign and Seal the Form.

**Note:** Not sealing the Form allows the clinician to review and make changes before sealing the Form.

7. Click the **Attach To This Client** button.
8. Click the **Ok** button.
9. Click the **Yes** button.

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## Program Transfer or Client Discharge

### Program Transfer

Program Transfer Forms are Forms used when transferring the client to another Program, adding a Program for the client, and/or dropping a Program for the client. **Note:** If you edit a Program on the Face Sheet instead of using a Program Transfer Form, a Transfer Form is automatically created and stored in the Document Center.

1. Navigate to Program Transfer or Client Discharge: **Main Menu > Admissions Menu > Program Transfer or Client Discharge**.
2. In the Choose Form section, select the **Transfer** radio button.

**Note:** In the Form Status section, all Forms will show as Not Yet Started until you select a Form and click the Open Form button.
3. Click the **Open Form** button.
4. Complete the appropriate fields on the Form. All fields with an asterisk are required.
5. Click the **Transfer Type** drop-down and select the Transfer Type.
6. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.

### Client Discharge

Client Discharge Forms are Forms for the client being discharged from your Agency, where the client is marked as Inactive on the Face Sheet and no further work can be completed for the client. Completing a [Follow-Up Post-Discharge Form](#) is the only way to continue documentation for the client.

1. Navigate to Program Transfer or Client Discharge: **Main Menu > Admissions Menu > Program Transfer or Client Discharge**.
2. In the Choose Form section, select the **Discharge Summary** radio button.  
**Note:** In the Form Status section, all Forms will show as Not Yet Started until you select a Form and click the Open Form button.
3. Click the **Open Form** button.
4. Complete the appropriate fields on the Form. All fields with an asterisk are required.
5. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.

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## Follow-Up Post-Discharge Forms

Follow-Up Post-Discharge Forms are Forms that allow you to follow up with an Inactive client who was discharged from your Agency. These Forms can be used to check in on the client after being discharged or to get the client's feedback on their care. Each Form may be completed multiple times.

1. Navigate to Follow-Up Post-Discharge Forms: **Main Menu > Clinical Forms Menu > Follow-Up Post-Discharge Forms**.
2. Search for and select the client.
3. In the Case # section, select the **radio button** for the client's Case # that you want to document on. If the client had multiple episodes of care, you will see multiple case numbers shown.  
**Note:** In the Case Status section, the Status of the care and Admission and Discharge Dates display.
4. Click the **Open Case** button.
5. In the Choose Form section, select the **radio button** for the specific Form.  
**Note:** In the Form Status section, all Forms will show as Not Yet Started until you select a Form and click the Open Form button.
6. Click the **Open Form** button.
7. Complete the appropriate fields on the Form. All fields with an asterisk are required.
8. Click a button at the bottom of the Form to take an action for the Form, or select the **E-Signature/Seal** button to finalize the Form.  
**Note:** All Sealed Forms are displayed under the Sealed Forms section at the bottom of the page.

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