NextStep Solutions
Moving Behavioral Health Forward

Portal QRG

The NextStep Portal provides clients with quick and convenient access to their behavioral health records. It is the responsibility of the Agency to provide and manage access to the client's portal. Administrators can update Portal Menu Permissions by navigating to **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Client Portal Configurations**. Depending on the client portal configuration settings, clients have access to perform the following actions in the portal:

- **Appointments**: Clients can view, confirm, cancel, and reschedule appointments. They can also self-schedule their appointments if enabled by your Agency.
- **Diagnoses and Meds**: Clients can view their diagnoses and medications. Diagnoses are displayed based on the Primary Diagnosis and Secondary Diagnosis entered in the Diagnosis widget within NSS.
- **Messages**: Clients can communicate with your office via Messages.
- **Documents**: Clients have access to Forms and Notes that can be viewed and signed, Editable Forms, CCDAs, and Educational Resources that have been shared to the Portal.
- **Billing**: Agencies contracted with Swerve Pay can give their clients access to see their current balance, add debit/credit cards to save on file, make payments, and view their payment history.
- **Activity**: Clients can view their activity history on the portal and portal password updates made by a NextStep user.
- **Reset Password**: Clients can reset their password. This is a standard feature and cannot be disabled.

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Grant Client or Representative Access to the Portal

Access to the portal is provided on a client-by-client basis. Portal accounts can also be set up for client representatives, such as a parent, guardian, or Social Worker.

1. Navigate to the Face Sheet: **Main Menu > Admissions Menu > Face Sheet**.
2. Search for and select the client, and click the **Edit** button.

3. Scroll to the bottom of the Face Sheet to the Client Portal section, and click the **Add Client Portal Login** button.

   Note: This section of the Face Sheet is only displayed if your Agency is contracted for the portal.

4. Click in the **Portal Username** field and type a username.

5. Click in the **Password** and **Confirm Password** field and type a password.

6. *(Optional)* Click the **Representative** checkbox if this account is for a representative of the client.

7. *(Optional)* The **Active** checkbox is automatically selected to make the Portal account active. If the client would like to deactivate their login in the future, deselect the Active checkbox.

8. Click the **Save** button.

9. Provide the Portal Username, Password, and Agency Portal URL to the client.

10. Repeat these steps as needed if you need to create another portal account associated with the client.

    Note: If a client refuses a portal account, select the **Client Refused Portal Login** checkbox.

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Reset a Client or Representative Portal Password

1. Navigate to the Face Sheet: **Main Menu > Admissions Menu > Face Sheet**.

2. Search for and select the client, and click the **Edit** button.

3. In the Client Portal section, click the **Edit** button for the Portal Username that you want to change the password for.

4. In the **Password** and **Confirm Password** fields, enter a new password.

5. Click the **Save** button.

6. Provide the new password to the client or representative.

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Send a Portal Message or Respond to a Portal Message

From the Message Center, you can communicate with a client by sending and replying to portal messages. By clicking **Share Settings** in the Message Center, you can grant access to your inbox to certain staff members so that they may read/reply to messages that were sent to you.

Send a New Message to the Portal

1. Navigate to the Message Center: **Navigation Menu > Message Center**.

2. Click the **New Message** button.

3. In the **To** field, search for the client. Accessible clients will be limited based on Location. Representatives associated with that client are also displayed.

4. In the **Subject** field, enter a subject for your message.

5. Compose your message, and click the **Send** button.

Reply to a Message from the Portal

New/unread messages are represented with a notification badge [1].

1. Navigate to the Message Center: **Navigation Menu > Message Center**.

2. On the Inbox tab, select the message that you want to reply to.

3. Click the **reply** button .

4. Compose your reply, and click the **Send** button.

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Send Forms to the Portal

Forms can be sent to the portal for clients to start prior to their visits, for clients to complete, or for clients to electronically sign. New Forms started by the client are displayed on the Reminders List of their assigned Primary Clinician as listed on the Face Sheet. However, if a clinician pushes a specific Form that has not yet been started, that Form is shown in the Reminders List of the clinician who sent the Form to the portal.

Note: Clients and/or their representatives **do not** get notifications when there is a task for them to complete on the portal.

Set Up a Form to be Started on the Portal

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

2. Select an existing Form from the drop-down.

3. Click the **Edit This Form** button.

4. Select the **Client Portal Accessible** checkbox. If checked, this Form will be able to be started by clients on the portal.

5. Click the **Update** button.

Send a Started Form to the Portal from Admissions or Clinical Forms

1. Navigate to the Admissions or Clinical Forms Menu: **Main Menu > Admissions Menu or Clinical Forms Menu**.

2. Select the Forms button from the Menu and search for and select the client.

3. *(Optional)* Click the **Heading** name to expand the section to display the available forms.

4. Click the **radio button** for the Form that you want to send to the Portal.

5. Click the **Open Form** button.

6. Fill in the appropriate fields.

7. Choose one of the following options.

- **Save and Send to Patient Portal:** The client can edit the Form and sign it.

    a. In the Send Form to Patient Portal window, select a **client login** from the drop-down.

    b. Click the **OK** button.

    c. Click the **OK** button on the Sent window. The client can edit the Form and sign it on the portal.

- **E-Signature/Seal**: If the clinician chooses this option and sends it to the portal, the client can only sign the Form.

    a. In the E-Signature/Seal window, complete the appropriate fields and sign the Form by entering your **password** or clicking the **Use E-Signatures** button.

    b. Click the **Submit** button**.** A window is displayed that the Form has been successfully Signed, Updated, and Sealed.

    c. Click the **Send to Patient Portal** button.

    d. Select a **client login** from the drop-down.

    e. Click the **OK** button.

    f. Click the **OK** button on the Sent window.

Note: To remove a Form from the Client Portal, click the **Remove from Patient Portal** button.

Send a Started Form to the Portal from the Document Center

1. Navigate to Document Center: **Main Menu > Reports Menu > Document Center**.

2. Search for and select the client.

3. Click the appropriate **Case #** radio button.

4. Click the **Open Case** button.

5. *(Optional)* Click the **Heading** name to expand the section to display the available Forms.

6. Click the **radio button** for the Form that you want to send to the portal.

7. Click the **Open Form** button.

8. Choose one of the following options.

- **Save and Send to Patient Portal:** The client can edit the form and sign it.

    a. In the Send Form to Patient Portal window, select a **client login** from the drop-down.

    b. Click the **OK** button.

    c. Click the **OK** button on the Sent window. The client can edit the Form and sign it on the portal.

- **E-Signature**: If the clinician chooses this option and sends it to the portal, the client can only sign the Form.

a. In the E-Signature window, complete the appropriate fields and sign the Form by entering your **password** or clicking the **Use E-Signatures** button.

b. Click the **Submit** button**.** A window is displayed that the Form has been successfully Signed.

c. Click the **Send to Patient Portal** button.

d. Select a **client login** from the drop-down.

e. Click the **OK** button.

f. Click the **OK** button on the Sent window.

Note: To remove a Form from the Client Portal, click the **Remove from Patient Portal** button.

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Send Client Education to the Portal

A Form can be set up to show as Client Education on the Portal if it was pushed to the portal by a clinician. The information is displayed on the portal in the Document Center, in a read-only format, and cannot be edited by the client.

Set Up a Form as Client Education for the Portal

1. Navigate to Form Builder: **Main Menu > Admin Tools Menu > Form Builder**.
2. Select an existing Form from the drop-down.
3. Click the **Edit This Form** button.
4. Click the **Client Education** checkbox.
5. Click the **Update** button.

Send Client Education to the Portal from Admissions or Clinical Forms

1. Navigate to the Admissions or Clinical Forms Menu: **Main Menu > Admissions Menu or Clinical Forms Menu**.
2. Select the Forms button from the Menu and search for and select the client.
3. *(Optional)* Click the **Heading** name to expand the section to display the available forms.
4. Click the **radio button** for the Form that you want to send to the Portal.
5. Click the **Open Form** button.
6. Fill in the appropriate fields.
7. Choose one of the following options.
   - **Save and Send to Patient Portal:**
     a. In the Send Form to Patient Portal window, select a **client login** from the drop-down.
     b. Click the **OK** button.

   c. Click the **OK** button on the Sent window.

- **E-Signature/Seal**:

   a. In the E-Signature/Seal window, complete the appropriate fields and sign the Form by entering your **password** or clicking the **Use E-Signatures** button.

   b. Click the **Submit** button**.** A window is displayed that the Form has been successfully Signed, Updated, and Sealed.

   c. Click the **Send to Patient Portal** button.

   d. Select a **client login** from the drop-down.

   e. Click the **OK** button.

   f. Click the **OK** button on the Sent window.

Note: To remove a form from the Client Portal, click the **Remove from Patient Portal** button.

Send Client Education to the Portal from the Document Center

1. Navigate to Document Center: **Main Menu > Reports Menu > Document Center**.
2. Search for and select the client.
3. Click the appropriate **Case #** radio button.
4. Click the **Open Case** button.
5. *(Optional)* Click the **Heading** name to expand the section to display the available Forms.
6. Click the **radio button** for the Form that you want to send to the Portal.
7. Click the **Open Form** button.
8. Choose one of the following options.

- **Save and Send to Patient Portal:**

   a. In the Send Form to Patient Portal window, select a **client login** from the drop-down.

   b. Click the **OK** button.

   c. Click the **OK** button on the Sent window. The client can edit the form and sign it on the portal.

- **E-Signature**: If the clinician chooses this option and sends it to the portal, the client can only sign the Form.

   a. In the E-Signature window, complete the appropriate fields and sign the Form by entering your **password** or clicking the **Use E-Signatures** button.

   b. Click the **Submit** button. A window is displayed that the Form has been successfully Signed.

   c. Click the **Send to Patient Portal** button.

   d. Select a **client login** from the drop-down.

   e. Click the **OK** button.

   f. Click the **OK** button on the Sent window.

Note: To remove a Form from the Client Portal, click the **Remove from Patient Portal** button.

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Configure Note Type to Send to the Portal

Administrators can configure which Note Types your Agency would like to automatically send to the portal for the client to view or view and sign. The Notes are displayed in the Document Center of the portal. Users with the Process Permission in Maintain Users, **Enable to Allow or Prevent a note from going to the Portal**, will be able to stop their Notes from going to the portal regardless of the system Portal Note Permissions.

1. Navigate to Client Portal Configurations: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Client Portal Configuration**.
2. In the Portal Note Permissions section, select the following:
   - **Allow Client to View**: Select this checkbox to view this Note Type on the Client Portal.
   - **Client Must Sign**: Select this checkbox to require a signature for the Note Type on the Client Portal.
   Note: If you select the Client Must Sign checkbox, you must also select the Allow Client to View checkbox or you will get an error when trying to save your changes.
3. Click the **Save changes** button.

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