

NextStep Solutions Version 10.4.1 Release Notes  
*All content is subject to change.*

Release Date: July 24, 2022

## Release Contents



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### Upcoming Feature: Standardized Demographic Fields on Face Sheet


In support of Cures Act and Meaningful Use reporting, the following Standardized Demographic fields have been developed to display on the Face Sheet in the upcoming release of version 10.5.0.

- Race
- Birth Sex
- Gender Identity
- Orientation
- Ethnicity
- Preferred Pronouns
- Smoking Status
- Language

Once the Standardized Demographic fields are released, users will see the active client's name displayed in the Navigation Menu which when clicked, will display the client's demographic information in a panel with an Edit button that takes the user directly to the client's Face Sheet.



**NextStep Customer Support will contact each Agency to determine how their current demographic values will be mapped to the new values. For more information, click [here](#).**

## NextStep Solutions Enhancements

Look for  throughout this documentation to identify work done to comply with the 21st Century Cures Act.

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\* Indicates the feature must be requested to be configured by a NextStep representative.  
When requesting the feature, refer to the *[bracketed name]*, if listed.

| eMAR  |  |
|---|--|
| <p><b>Display All Passes</b><br/>Main Menu &gt; Treatment Planning Menu &gt; eMAR</p>   | <p>eMAR users can now see late passes, current passes, and completed passes regardless of the designated Passing Times (Morning, Noon, Afternoon, and Night) by selecting a building (except for the "All" option) from the <b>Building</b> drop-down. Or, if you have already selected another Passing Time, you can click the <b>All Passes</b> button to see this information. Select the <b>Show Completed Passes</b> checkbox to display clients that already received meds and treatments today or select the <b>Show Clients With No Passes</b> checkbox to display clients that aren't scheduled for meds and treatments today.</p>  |
| Face Sheet Enhancement  |  |
| <p><b>Sub and Subsub Demographic Choices</b><br/>Main Menu &gt; Admin Tools Menu &gt; System Setup (Supplemental) &gt; Demographics Configuration</p> <p></p> | <p>Under the Standardized Demographic fields, Admin users can create custom sub and subsub choices to select on the Face Sheet. The custom choices can be marked/unmarked as In Use, and you can allow end-users to have a free text option.</p> <p>While you can get started on your setup now, the full functionality of the feature won't be released until 10.5.0. See the <a href="#">Upcoming Features</a> section above for more information.</p>   |
| Forms/Notes   |  |
| <p><b>Dropdown Template Header Field</b><br/>Main Menu &gt; Admin Tools Menu &gt; Header Setup</p>  | <p>Headers can now display data from Face Sheet "Dropdown Template" fields using Header Setup.</p>   |
| <p><b>Pending Amendments Display in Reminder List for Notes and Forms</b><br/>Navigation Menu &gt; Reminders</p> <p></p>                                    | <p>A new section in the Reminders List, <b>Pending Amendments for your Case Load</b>, displays proposed amendments that have been added to a Note or Form from the client or another user. All Case Assignments for the client will be able to see the proposed amendment regardless of permission to Accept/Deny the request. Once a user Accepts/Denys the requests, the proposed amendment will no longer show on the Reminders List. See permission information under Maintain Users below to set up an Admin user to Accept/Deny the request for any client.</p> <p>To enable this section in the Reminders List, select the checkbox for Pending amendments for a user's caseload. <i>Main Menu &gt; Admin Tools Menu &gt; System Setup &gt; Reminders tab</i></p> |
| <p><b>Print Multiple Forms</b><br/>Main Menu &gt; Reports Menu &gt; Document Center</p>   | <p>When a user clicks the <b>Print Multiple Forms</b> button in the Document Center, the user can select all Forms at the Client Level, the Form Type Level (Assessment, Unscheduled, etc.), and at the Form Category Level.</p>   |
| <p><b>Reasoning Field on Proposed</b></p>   | <p>When a user Accepts/Denies a proposed amendment, a Reasoning can be</p>   |

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| <p><b>Amendment</b><br/><i>Various</i></p> <p>21</p>   | <p>entered stating why the amendment was Accepted/Denied. Help text has been added to the Amendment window to explain what happens to the amendment once Accepted/Denied.</p>  |
| <p><b>Signature Field on Forms Reformatted</b><br/><i>Main Menu &gt; Admin Tools Menu &gt; Form Builder</i></p>        | <p>A change has been made to the Form Builder where the Signature field on Forms has been reformatted to take up less space.</p>   |
| <p><b>IBHRS</b></p>  |  |
| <p><b>IBHRS Data Export Tool Prerequisites</b><br/><i>Main Menu &gt; Reports Menu &gt; IBHRS &gt; IBHRS Export</i></p> | <p>IBHRS customers will no longer be able to export a client file using the IBHRS Export Data Tool unless all prerequisite files have already been downloaded.</p> <ul style="list-style-type: none"> <li>• Treatment Episode files cannot be exported until the Provider Client data has been downloaded.</li> <li>• Service files cannot be downloaded until Treatment Episode files have been exported.</li> </ul>  |
| <p><b>IBHRS Linker-Unlinker Tool</b><br/><i>Main Menu &gt; Admin Tools &gt; IBHRS Linker-Unlinker Tool</i></p>         | <p>A new Admin Tool, <b>IBHRS Linker-Unlinker Tool</b>, has been added to Maintain Users for IBHRS customers. When enabled, IBHRS Admin users can link and unlink Clinical Notes to IBHRS Care Statuses.</p>   |
| <p><b>IBHRS/IDPH Updates</b><br/><i>Various</i></p>  | <p>Due to an update from IBHRS/IDPH, when an IBHRS user is in a Form, you will see Kratom in the Detailed Substance Type drop-down and will no longer see the following Living Arrangement choices in the Living Arrangements drop-down.</p> <ul style="list-style-type: none"> <li>• 3000.3 Dependent living - Residential care</li> <li>• 3000.4 Dependent living - Foster home/Foster care</li> <li>• 3000.5 Dependent living - Crisis residence</li> <li>• 3000.6 Dependent living - Institutional setting</li> <li>• 3000.7 Dependent living - Jail/Correctional facility/Other institutions under the justice system</li> <li>• 3000.8 Dependent living - Private residence</li> </ul> |
| <p><b>IBHRS Treatment Episode Export</b><br/><i>Main Menu &gt; Reports &gt; IBHRS &gt; IBHRS Export</i></p>            | <p>Increased time allowed to load treatment episodes to prevent timeout errors</p>   |
| <p><b>Maintain Users</b></p>   |  |
| <p><b>Accept or Deny Proposed Amendment Process Permission</b><br/><i>Navigation Menu &gt; Maintain Users</i></p>      | <p>A new Process Permission, <b>Enable to Accept or Deny a proposed amendment to form or note</b>, has been added to Maintain Users. When enabled, a user can Accept or Deny a proposed amendment and write a reason for their decision. The proposed amendment could be from a user at the Agency or a client from</p>  |

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| <p>21</p>  | <p>the Client Portal. <b>Note:</b> A user who is not an Admin will only be able to Accept/Deny for their caseload. An Admin user can Accept/Deny for any client.</p>   |
| <p><b>Emergency Mode Warning</b><br/><i>Main Menu &gt; Enable Emergency Mode</i><br/>*[Certification]</p> <p>21</p>  | <p>When a user has the <b>Emergency Access</b> checkbox selected in Maintain Users, an Enable Emergency Mode button is displayed at the bottom of Main Menu. When clicked, a warning is displayed stating, "Enabling Emergency Mode gives designated users access to all clients and all client records, ignoring typical restrictions".</p>   |
| <p><b>Prevent a Note from Going to the Portal Process Permission</b><br/><i>Navigation Menu &gt; Maintain Users</i></p>  | <p>A new Process Permission, <b>Enable to Allow or Prevent a note from going to the Portal</b>, has been added to Maintain Users. When enabled, after a user clicks the Enter Note (Final) button, the user must select the No radio button to prevent the Note from going to the portal. When No is selected, the user must enter a reason in the Reason field. <b>Note:</b> A user who does not have the permission will see a note that says "This note will be sent to the Client Portal".</p> |
| <p><b>Portal</b></p>   |  |
| <p><b>Client Portal Change Password Email</b><br/><i>Client Portal &gt; Reset Password or Main Menu &gt; Admissions Menu &gt; Face Sheet</i></p>   | <p>When a client's portal password has been reset by either the Agency or client, the client will receive a password reset email.</p>  |
| <p><b>Client Portal Changes Log</b><br/><i>Client Portal &gt; Activity or Main Menu &gt; Reports Menu &gt; Document Center</i></p>   | <p>When a client portal login is created or a password is reset, the changes will be documented within the Client Action Log in the Client Portal and Face Sheet - Change Log in the NextStep Document Center.</p>   |
| <p><b>Manage Client Portal Login</b><br/><i>Main Menu &gt; Admissions Menu &gt; Face Sheet</i></p>   | <p>An Agency can now deactivate or reactivate a client's portal login and update the client's username from the Face Sheet.</p>  |
| <p><b>Notes Configured to Display on Client Portal</b><br/><i>Main Menu &gt; Admin Tools Menu &gt; System Setup (Supplemental) &gt; Client Portal Configuration &gt; Portal Note Permissions</i></p> | <p>Admin users can now designate which Note Types are displayed in the Document Center of a client's portal. A Note Type can be designated as view-only and require a client's signature.</p>  |
| <p><b>Notes Display in Client Portal under Documents</b><br/><i>Client Portal &gt; Documents</i></p> <p>21</p>   | <p>Notes that are configured to go to the Client Portal, for the client to view and sign, are displayed in the Document Center once they are signed and sealed.</p>  |
| <p><b>Propose Amendment on Form or Note in Client Portal</b><br/><i>Client Portal &gt; Documents</i></p>   | <p>When viewing a document in the Client Portal, a client can propose their own Form or Note amendment by clicking the <b>Propose Amendment</b> button.</p>  |

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## Reports

### Administrative Reports Reorganization

*Main Menu > Admin Tools > Menu Setup - Report Setup*

For clarity and ease of use, many stock reports and dashboards under Administrative Reports have been renamed and added to a category. When hovering over the report name, a description of the report is displayed. To adjust any of the changes, navigate to Menu Setup - Report Setup.

## Treatment Plan

### "Treatment Plan Supervisor" Can Be Renamed\*

*Various*

On the first page of the Treatment Plan Builder, a role drop-down called **Treatment Plan Supervisor** is displayed. This drop-down field can be renamed. To have this field renamed, contact NextStep Support with the role name that your Agency would like to use.

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## Resolved Issues

**Issue:** When an administrator unfinalized a note, the user would be logged out of NextStep.

**Resolution:** The user will not be logged out of NextStep when unfinalizing a note.

**Issue:** When a user made changes to the Scheduler Profiles, the changes were not saved.

**Resolution:** Changes made to the Scheduler Profiles are saved as expected.

**Issue:** For Agencies who do not use DrFirst, discontinued medications were not displayed in the Discontinued Medication History section of the Medication Plan.

**Resolution:** Agencies who do not use DrFirst will now see discontinued medications in the Discontinued Medication History section of the Medication Plan.

**Issue:** For Agencies not using DrFirst, controlled substances were not displayed correctly in a client's Medication Plan and eMAR.

**Resolution:** Agencies not using DrFirst will now see controlled substances properly displayed in the client's Medication Plan and eMAR.

**Issue:** When users were set up with MOST Audit and Compliance permissions in the new Maintain Users page, they were unable to access MOST.

**Resolution:** Users with MOST Audit and Compliance permissions are now able to access MOST.

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**Issue:** When clicking a link icon for a revocable Form, the question was not linking properly when running an audit in the MOST Audit and Compliance Tool.

**Resolution:** The link icon for a revocable Form is now properly linked to NextStep.

**Issue:** An error displayed when users created a new client record from the Enrollment page.

**Resolution:** Users can create a new client record from the Enrollment page without receiving an error.

**Issue:** When users admit a client with a date in the future, they receive a pop-up message preventing them from making any updates to the client's case.

**Resolution:** Users will no longer be able to admit a client with a date in the future. This is to prevent additional issues from occurring in the software.

#### **For Agencies reporting to IBHRS:**

**Issue:** For IBHRS customers using the IBHRS Export Data tool, when the Care Status Code was not 20900.5 (i.e. Discharge), the Concerned Person Involved was provided to IDPH.

**Resolution:** When using the IBHRS Export Data tool, the Concerned Person Involved Code will be provided to IDPH only if the Care Status Code is 20900.5.

**Issue:** Medications were not displayed correctly in the Night Pass Passing Time window in eMAR. This was due to the system using the Agency's server time and not the local time.

**Resolution:** The Night Pass Passing Time window in eMAR is based on the Agency's local time and will function as expected.

**Issue:** The Pass Entered On column displayed the Agency's server time and not the local time for eMAR users on the Recent Pass History window.

**Resolution:** The Pass Entered On column will display as expected in the Agency's local time.

**Issue:** The client's bed admission time and date were not properly displayed in Residential reports.

**Resolution:** The following Residential reports have been updated to properly reflect the client's bed admission time and date:

- Building Log
- Bed Transfer History
- Client Roster
- Residential Rost

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