Residential Setup QRG

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Bed Management Setup

Bed Management entails setting up Buildings, Rooms, and Beds. By making sure these are set up properly, your facility will be able to quickly and efficiently maintain your census. Your Agency's initial Bed Management was configured by the NextStep Implementation team, and the steps below are intended to be taken if you need to add a new Building, Room, and Bed. Once completed, the bed setup can be viewed for a client by navigating to **Main Menu > Admissions Menu > Bed Management**.

Create a Building

1. Navigate to Bed Setup: **Main Menu > Admin Tools Menu > Bed Setup**.
2. Click the **New** button.
3. In the **Building Name** field, enter the name of the Building**.**
4. Click the **Location** drop-down to select the physical location.

   Note: Only users in the selected location will be able to see the clients, Buildings, Rooms, and Beds associated with the location.
5. Click the **Update** button.

   Note: The **In Use** checkbox is automatically selected which makes the Building available in Bed Management.

Create a Room

Once a Building has been created, a Room can be associated with the Building.

1. Navigate to Bed Setup: **Main Menu > Admin Tools Menu > Bed Setup.**
2. Click the **+** to expand the row for the Building.

	#	Building Name	Location	Occupied Beds	In Use
⊞	**Edit New**	LTR-M	Testing Location	1	☑

3. Click the **New** button.
4. In the **Room Name** field, enter the name of the Room.
5. Click the **Update** button.

   Note: The **In Use** checkbox is automatically selected which makes the Room available in Bed Management.

Create a Bed

Once a Building and Room have both been created, a Bed can be associated with the Room.

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

2. Click the **+** to expand the row for the Building.

	#	Building Name	Location	Occupied Beds	In Use
⊞	**Edit New**	LTR-M	Testing Location	1	☑

3. Click the **+** to expand the row for the Room.

	#	Building Name	Location	Occupied Beds	In Use
⊟	**Edit New**	LTR-M	Testing Location	1	☑

Enter text to search…			

	#	Room Name	Occupied Beds	In Use
⊞	**Edit New**	C101A	0	☑

4. Click the **New** button.

5. In the **Bed Name** field, enter the name of the Bed.

   Note: The **Occupied** checkbox is automatically selected when a client has been assigned to the Bed.

6. Click the **Update** button.

   Note: The **In Use** checkbox is automatically selected which makes the Bed available in Bed Management.

Edit a Building, Room, or Bed

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

2. Locate the Building, Room, or Bed that needs to be edited:
   - To edit a Building: Click the **Edit** button next to the Building.
   - To edit a Room: Click the **+** to expand the Building then click the **Edit** button for the Room.
   - To edit a Bed: Click the **+s** to expand the Building and the Room, and then click the **Edit** button for the Bed.

3. Make the necessary changes.

   Note: To mark a Building, Room, or Bed as not available, deselect the **In Use** checkbox.

4. Click the **Update** button.

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Checklist Setup

Checklists are an effective way to quickly record information about multiple clients at once, and replace paper hourly rounds and bed checks. Your Agency's initial Checklist setup was configured by the NextStep Implementation team,

and the steps below are intended to be taken if you need to create a single Checklist. Once completed, the Checklist can be viewed for a client by navigating to **Main Menu > Progress Notes Menu > Bed Checks and Checklists**.

Create a New Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. In the Checklist Setup Select section, click the **New** button.

	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block
New										

Checklist Setup Select

3. Complete the appropriate fields.

    *   **Checklist Name**: Enter a name for the Checklist.
    *   **Row Header:** Enter what you would like the row header to display.
    *   **Show Row Names**: Select the checkbox to display the row names.
    *   **Show Progress Notes**: Select the checkbox to display a Progress Note section.
    *   **Progress Note Name**: Enter a name for the Progress Note header.
    *   **Progress Note Col 1 Name**: Enter what you would like Column 1 to be named.
    *   **Progress Note Col 2 Name**: Enter what you would like Column 2 to be named.
    *   **Show Row Select Dropdown in Col 1**: Select the checkbox if you would like to add a drop-down to column 1 of the Progress Note. This drop-down will provide a list of the Checklist row names to choose from.
    *   **Populate Checklist by Building**: Select the checkbox if you would like to populate the Checklist by Building.
    *   **Show Patients by Block**: Select the checkbox to display all clients for a specific time block. This also automatically selects the Populate Checklist by Building checkbox and will display clients in a list by building and block. When this option is selected, the option to Show Progress Notes is no longer available.
        Note: By not selecting Populate Checklist by Building or Show Patients by Block, the Checklist will populate by an individual client.

4. Click the **Update** button.

Edit a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. In the Checklist Setup Select section, click the **Edit** button.

	New	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block
						Checklist Setup Select					
⊞ Edit Delete		Hourly Check Form -12 AM - 6 AM	Time	☑	☐	Progress Note			☑	☑	☐

3. Make the necessary changes, then click the **Update** button.

Delete a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. In the Checklist Setup Select section, click the **Delete** button.

	New	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block
						Checklist Setup Select					
⊞ Edit Delete		Hourly Check Form -12 AM - 6 AM	Time	☑	☐	Progress Note			☑	☑	☐

3. Click the **Ok** button.

Add a Column to a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. Click the **+** to expand the row for the Checklist.

	New	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block
⊞ Edit Delete		Hourly Check Form -12 AM - 6 AM	Time	☑	☐	Progress Note			☑	☑	☐

3. In the Columns section, click the **New** button and fill in the appropriate fields.

- **Column Name**: Enter the name of the column.
- **Column Type**: Click the drop-down to select the type of field that you would like this to be.
  - **Dropdown**: Allows the user to select from a list of drop-down options your Agency creates.
    Note: If you select this as your Column Type, click the **Save Changes** button then click the **+** next to the column row to expand the Dropdown Options section. Click the **New** button to add the drop-down choices then click the **Save Changes** button again to save the options.

  - **User Dropdown**: Allows the user to select a drop-down list of NextStep users.
  - **Text**: Allows the user to enter free text.
- **Specify Dropdown Option Order**: Select the checkbox to have the drop-down options display in sort order. By default, the list options display alphanumerically.
- **Required**: Select the checkbox to make the column a required field.
  Note: If the Required checkbox is selected, and the user is not able to fill in the column on the Checklist for the client, then the Checklist will not be able to be sealed.
4. *(Optional)* Create additional columns by repeating step 3.
5. Click the **Save changes** button.
6. *(Optional)* If multiple columns were created, click the **up** or **down arrow** in the **#** column to organize the order of the columns.

Edit a Column for a Checklist
1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.
2. Click the **+** to expand the row for the Checklist.
3. In the Columns section, click the **Edit** button.

		Columns			
New	Column Name	Column Type	Specify Dropdown Option Order	Required	#
Edit Delete	Staff Member	userdropdown	☐	☑	▲ ▼

4. Make the necessary changes, then click the **Save changes** button.

Delete a Column for a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. Click the **+** to expand the row for the Checklist.

3. In the Columns section, click the **Delete** button.

		Columns			
New	Column Name	Column Type	Specify Dropdown Option Order	Required	#
Edit Delete	Staff Member	userdropdown	☐	☑	▲ ▼

4. Click the **Ok** button.

Add a Row to a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. Click the **+** to expand the row for the Checklist.

	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block
New										
⊞ Edit Delete	Hourly Check Form -12 AM - 6 AM	Time	☑	☐	Progress Note			☑	☑	☐

3. In the Rows section, click the **New** button.

	Rows	
New	Row Name	#
	No data to display	
	Preview changes Save changes Cancel changes	

4. Click in the **Row Name** field, and enter the name of the row.

5. *(Optional)* Create additional rows by completing steps 3 & 4.

6. Click the **Save changes** button.

7. *(Optional)* If multiple rows were created, click the **up** or **down arrow** in the **#** column to organize the order of the rows.

Edit a Row for a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. Click the **+** to expand the row for the Checklist.

3. In the Rows section, click the **Edit** button.

Rows		
New	Row Name	#
Edit Delete	12:00	▲ ▼

4. Make the necessary changes, and click the **Save changes** button.

Delete a Row from a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**.

2. Click the **+** to expand the row for the Checklist.

3. In the Rows section, click the **Delete** button.

Rows		
New	Row Name	#
Edit Delete	12:00	▲ ▼

4. Click the **Ok** button.

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Census Billing Setup

Census Billing can be customized to display what your Agency sees when performing Census Billing. Your Agency's initial Census Billing setup was configured by the NextStep Implementation team, and the steps below are intended to be taken if you need to add or update activities or billing fields that display in Census Billing. Once completed, Census Billing can be viewed for a client by navigating to **Main Menu > Progress Notes Menu > Census Billing**.

Add an Activity for Billing Census

1. Navigate to Census Billing Proc Code Field and Billing Fields: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Census Billing**.

2. Click the **New** button, on the table to the left, to add an Activity.

New	Option Text	Billing Option Link	#

3. Fill in the appropriate fields by double-clicking in the field.
   - **Option Text**: Enter the name of the Activity for the user to select in Census Billing.
   - **Billing Option Link**: Click the drop-down to link the Activity in Billing Setup.
     Note: If an Activity does not have a Billing Option Link selected, it will not go over to the Billing Engine. Even for non-billable Activities, a Billing Option Link should be selected.

4. Click the **Save Changes** button.

Edit an Activity

1. Navigate to Census Billing Proc Code Field and Billing Fields: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Census Billing**.
2. Double-click in the **Option Text** or **Billing Option Link** field to make the necessary changes.
3. Click the **Save changes** button.

Delete an Activity

1. Navigate to Census Billing Proc Code Field and Billing Fields: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Census Billing**.
2. Click the **Delete** button.

New	Option Text	Billing Option Link	#
Delete	Bed Day	Bed Day	▲ ▼

3. Click the **Save changes** button.

Show Billing Fields
Your Agency can determine which Billing fields are displayed in Census Billing. The Billing Fields created for your Agency were set up in **Main Menu > Admin Tools Menu > System Setup > Billing Setup**.

1. Navigate to Census Billing Proc Code Field and Billing Fields: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Census Billing**.
2. Billing Fields are displayed in the right-hand table. Select the **Visible** checkbox(es) to have the field(s) displayed in Billing Census.

Note: Start Time and Stop Time are normally not selected as Census Billing is per diem.

3. *(Optional)* Click in the **Default Text** and **Default Value** fields and enter text to automatically have the text display in Census Billing for the field.

4. Click the **Save Changes** button.

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Care Log Setup

Care Logs are used by Residential Agencies to document and track a client's daily behaviors, activities, and progress toward meeting their goals. Your Agency's initial Care Log setup was configured by the NextStep Implementation team, and the steps below are intended to be taken if you need to create additional groups, activities, field types, or shifts. Once completed, the Care Log can be viewed for a client by navigating to **Main Menu > Progress Notes Menu > Care Logs**.

Change Effective Date for a Care Log

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

2. Click in the **Effective Change Date** field and select a date for when you would like the Care Log changes to take effect.
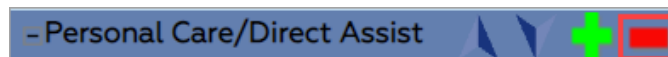
Add a Group to a Care Log
Groups can be created to separate and sort Activities on a Care Log.

1. In the Care Log Editor section, click the **Add New Group** button.

2. Click in the **Please enter the name of the new Group** field to enter a Group name.
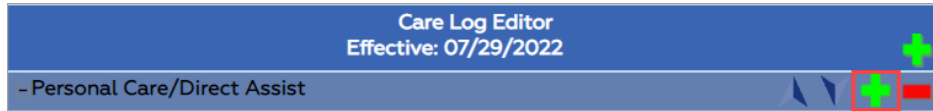
3. Click the **Add Group** button.

Note: To delete a Group, click the **Discontinue this Group** button then click the **Confirm** button.

Add an Activity to a Care Log

Once a Group has been created, Activities can be associated with the Group.

1. Within the Care Log Editor, click the **Add New Activity** button next to the Group row, to create an Activity.

2. Click in the **Please enter the name of the new Activity** field and enter an Activity name.

3. Click the **Add Activity** button.

   Note: To delete an Activity, click the **Discontinue this Activity** button then click the **Confirm** button.
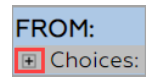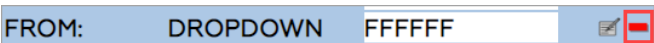

Add Fields and Field Types

New Fields can be created and linked to a Field Type for an Activity. This association helps with data collection on Activities. Each Field Type may be associated with multiple Activities.

1. Within the Care Log Setup, click the **Edit Field Types** button.

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

3. Click in the **Please Enter the Name of the New Field** field to enter a Field name.

4. Click the **Please Select the Field Type** drop-down and select the type of field to create.

5. *(Optional)* Click in the **Custom Color** field and enter a hex color code to add a custom color.

6. Click the **Add Field** button.

   Note: If you selected Dropdown as the Field Type in Step 4, click the **+** to expand the Field Type row and click the **Add New Choices** button to add drop-down options.
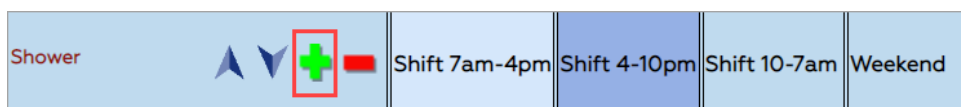
To delete a Field, click the **Discontinue this Field** button then click the **Confirm** button.

Add Field Types to an Activity

Field Types can be associated with an Activity. The field is displayed on the Care Log under the Activity and Shifts.
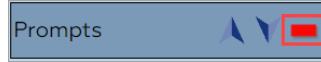
1. Within the Care Log Editor, click the **Add New Field** button next to the Activity row.

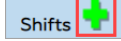2. Click in the **Please Select the Field Type** drop-down and select a Field Type.

3. Click the **Add Field** button.

   Note: To delete a Field Type, click the **Remove this Field (from this Activity)** button then click the **Confirm** button.

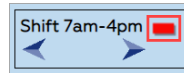## Add an Additional Shift to a Care Log

Additional Shifts can be created to coincide with your Agency's shifts. Shifts are equivalent to the time of day (shift) that you would be documenting or observing the client.

1. Within the Care Log Setup, click the **Add New Shift** button .

2. Click in the **Please enter the name of the new Shift** field to enter a shift name.

3. Click the **Add Shift** button.

   Note: To delete a Shift, click the **Discontinue this Shift** button then click the **Confirm** button.

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