Clinical Release Notes 10.6.1

Not Reviewed

NextStep Solutions Version 10.6.1 Release Notes

All content is subject to change.

November 20, 2022

Release Contents

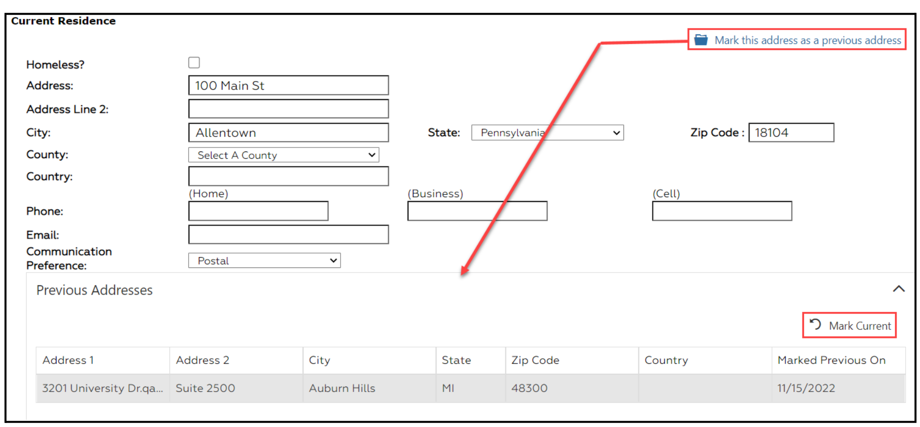
[Enhancements](#) [Resolved Issues](#)

NextStep Solutions Enhancements

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

Billing	
Billing Services Dynamic Report *Reports Menu > Administrative Reports*	The below changes have been made to the Billing Services Dynamic report: ● The column for Program has been renamed to Form/Note Program for clarity. The information in the column remains unchanged, which is the program the form or note in question is associated with. ● Column added for Date of Birth which is taken from the client's Face Sheet.
Disable Scheduler Billing Trigger with SwervePay Payment	Agencies who enter payment information into the Scheduler appointment's Payments section and use that data to take a client's payment in the Payment Center, will no longer see duplicate payments in the billing engine. **Note**: NSS has to enable/disable this Setup Variable.
Line Item AR Dashboard *Practice Management Menu > Billing*	The following changes have been made to the **Line Item AR Dashboard**. ● Removed the following:

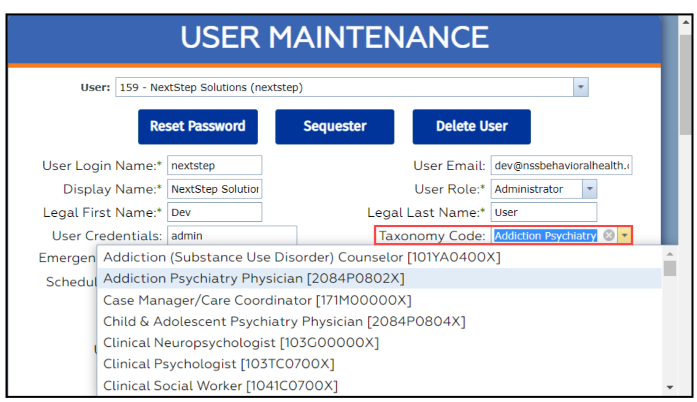
Reports	○ Date First Submitted and DOS filter. ○ Duplicate grids in Aging by Date Billed and Aging by DOS ○ Aging by DOS has been replace by Aging Detail by Date Type ○ Department column ● Updated the following: ○ Default Date Range ○ Facility column to Location ○ Payer class column to Party Type ○ Zero billed amounts not shown ● Added the following ○ Aging bucket global filter ○ Count dots and hover labels on the Aging Bucket graph ○ Adjustment column to the Detail Grid ● Dashboards load without error.

Forms/Notes	
Language List on Face Sheet *Admissions Menu > Face Sheet*	An Agency's top five selected languages will display at the top of the list, in order of popularity, when clicking the Languages drop-down on the Face Sheet.
Custom Case Assignments *Admissions Menu > Face Sheet*	Custom Case Assignments fields will align correctly with the original four on the Face Sheet.
Previous Address *Admissions Menu > Face Sheet* 21	The Face Sheet section for Current Residence has been updated to display a button called '**Mark this address as a previous address**'. This button adds the client's address to a new section called Previous Addresses, and clears out the address information. Additionally, you may click the **Mark as Current** button, in the Previous Addresses field, to make the selected address as the Current Residence.  The **Mark this address as a previous address** button is unavailable when: ● The Current Residence address, city, zip and state fields are blank. ● Information is deleted in the address, city, zip or state fields. The **Mark this address as a previous address** button is available when:

Clinical Release Notes 10.6.1

<table>
<tr><td></td><td>Information is added to the existing Current Residence fields of address, city, zip, and state fields.</td></tr>
<tr><td>Growth Chart Values
Admissions Menu > Face Sheet
21</td><td>New fields were added to the Vitals Widget for Head Circumference-For-Age, Inhaled Oxygen Concentration, and Weight-For-Length. These fields only appear if the client is 3 years old or younger. Male and female percentages are calculated differently based on CDC guidelines.
Note: The fields are enabled in Admin Tools > System Setup > Notes tab.</td></tr>
<tr><td>Pre-Admit Forms Automatically Sealed
Document Center > Choose and Open Preadmit Forms</td><td>When a client is admitted and their Pre-Admit forms are automatically sealed, the Pre-Admit forms will display "Sealed Automatically Upon Client Admission" and will include the date, time and name of the user who admitted the client.

FORM UPDATES<table><tr><th>Name</th><th>Date</th><th>Action</th></tr><tr><td>NextStep Solutions</td><td>3/31/2022 12:08:10 PM</td><td>Form Started</td></tr><tr><td>NextStep Solutions</td><td>11/1/2022 02:56:27 PM</td><td>Sealed Automatically Upon Client Admission</td></tr></table></td></tr>
<tr><td>Previous Last Name Field
Admissions Menu > Face Sheet
21</td><td>When a client's last name has changed, you have a Previous Last Name field available. Examples of use but not limited to Marriage, Adoption, Divorce, etc..</td></tr>
<tr><td>Prior Authorization Required Added to Insurance (Billing) field
Admissions Menu > Face Sheet</td><td>A checkbox, Authorization Required?, has been added to the Insurance (Billing) field. If the payer has been setup to always have prior authorizations required, this box is checked by default. The checkbox can be selected or deselected and the selection will be reflected in the Billing Engine.</td></tr>
</table>

<table>
<tr><th colspan="2">Maintain Users</th></tr>
<tr><td>Taxonomy Code Field Available for Agencies with ONC Certification Enabled
Main Menu > Maintain Users
21</td><td>For agencies with ONC Certification enabled (Setup Variable: Certification=1), a new drop-down field for Taxonomy Code is available in Maintain Users. If ONC Certification is not enabled the Taxonomy Code field will not appear in Maintain Users.
</td></tr>
</table>

CDS Alerts for Demographics *Reports Menu > Manage CDS Alerts* 21	CDS (Clinical Decision Support) alerts will now validate against the new standardized demographics fields. These fields include: Date of Birth, Race, Birth Sex, Ethnicity and Language. **Note**: To setup CDS rules you can navigate to **Admin Tools > Manage CDS Rules**
CDS Alerts for Vitals *Reports Menu > Manage CDS Alerts* 21	CDS (Clinical Decision Support) alerts will now validate against the new additions to the **Vitals widget**. **Note**: To setup CDS rules you can navigate to **Admin Tools > Manage CDS Rules**
CCDA Reconciliation *Admin Tools Menu > CCDA Reconcile* 21	Users can now reconcile discrepancies between imported data and NSS data, as expected.
CCDA Care Team *Admin Tools Menu > CCDA Reconcile* 21	When generating a CCDA, a client's listed Care Team will consist of those on that client's Face Sheet Case Assignments.

Message Center	
User Messaging *Main Menu > Message Center*	Users may send messages to other user(s), who share the same location, from the Message Center. To use the Message Center the Agency must have the setup variable ShowMessageCenter enabled. • The Message Center badge will display a count of unread message from clients and users. • The **To** field will contain a list of clients and users including their User Role.

Medication Management: eMAR	
Append EOD on a Medication or Treatment *Treatment Planning menu > eMAR*	For a medication or treatment that has a discontinue date, the Med Discontinued Date field will now include the date with EOD appended.
Input Client Vital Signs *Treatment Planning menu > eMAR*	A Vitals button is available on the Med and Treatment Pass screen. When clicked, users will be able to see that client's Vitals History and enter in new vitals for that client. Admin users have the ability to edit or delete entered vitals.
Review Medication Schedule *Treatment Planning Menu > eMAR*	If a new schedule is added to a reviewed medication, the new schedule must now be reviewed before going into effect. Users with Review permissions will see a red R icon next to new schedules that need reviewing.

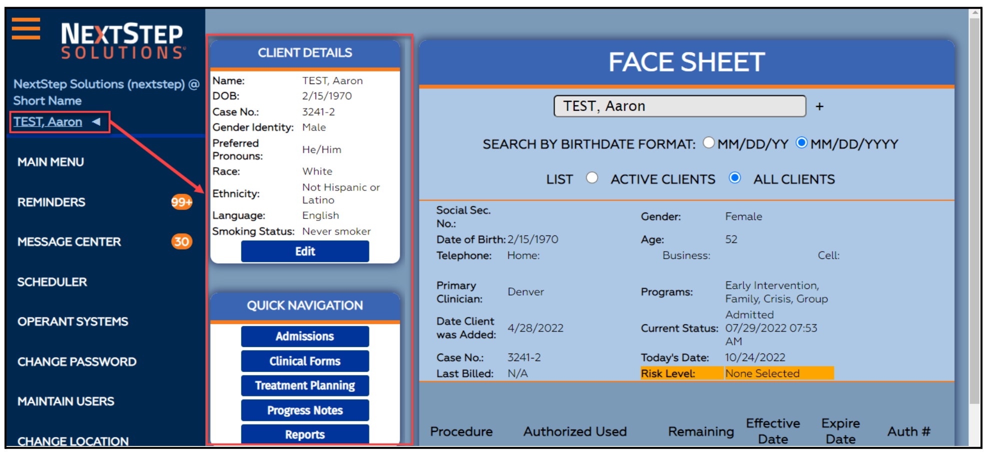
Clinical Release Notes 10.6.1

Scheduler

Birth Sex Populates Sex Field in Scheduler *Scheduler > Edit Client*	If a client's Birth Sex is completed on the Face Sheet, that data will flow into the Client Information section of the Scheduler. If Birth Sex is not completed, the Scheduler will pull the information from the Gender field.

Navigation Menu

Client name and Quick Navigation menu available from the Navigation Menu *Main Menu*	This enhancement is intended to streamline your Agency's clinical workflow when working with a client. You now have the option to navigate the current client's Main Menu items without having to return to the Main Menu each time. On the top-left of the Main Menu, the underline has been removed from the Location and a link has been added for the client's name. Once a client is selected, you may click the client's name or click the right-facing arrow to display Client Details and Quick Navigation. To close, click the client's name once again or the left-facing arrow.



Administrative

Set a Main Location for an Agency *Admin Tools Menu > System Setup (Supplemental) > Location Configuration* 21	As an Agency, you will have the ability to designate one of your locations as the organization's main location. Only one location may be selected as the main location.

Reports

Deposit Sheet Report *Practice Management > Billing*	The Deposit Sheet report is no longer in the billing engine and can be found in

Reports	Clinical under Practice Management > Billing Reports

Client Portal	
Reset Password *Client Portal*	When Client Portal users selects the Forgot Your Password button from the Portal login screen, an email will be sent to the email address entered in the Client Portal section of the Face Sheet. The email will contain the username, a temporary password, and URL. Once the Client accesses the Client Portal they will be required to enter their username and temporary password which will display the window to enter a new password.
Reset Password *Admissions Menu > Face Sheet*	Your agency can reset a Client password by selecting the Edit button within Nextstep in the Client Portal section of the Face Sheet, once selected an email will be sent containing the username, a temporary password, and URL. Once the Client accesses the Client Portal they will be required to enter their username and temporary password which will display the window to enter a new password.

Back to Top

Resolved Issues

Start Time and Stop Time for **Billing Box Data** will now be formatted correctly on Notes, Forms and Case Manager Summary.

On the **Scheduler Profiles** page, clicking the Select All box will now select all checkboxes across all pages and not only checkboxes visible to the user.

Update from IBHRS/IDPH:

- Agencies will see Kratom (12800.65) as a substance in the substances dropdown.
- The following Living Arrangements have been discontinued:
  - 3000.3 Dependent living - Residential care
  - 3000.4 Dependent living - Foster home/Foster care
  - 3000.5 Dependent living - Crisis residence
  - 3000.6 Dependent living - Institutional setting
  - 3000.7 Dependent living - Jail/Correctionalfacility/Other institutions under the justice system
  - 3000.8 Dependent living - Private residence

When selecting a client from the **Pending Amendments** section of the Reminders window, the correct client name is displayed in the left menu.

Users can now add and edit **Scheduler Time Blocks** from *System Setup (Supplemental) > Scheduler Configuration* as expected.

When selecting the **Get Balance** button on the Facesheet, the correct balance will be displayed.
Forms assigned to users using the **Assign To** button will now always appear in that user's Reminder's List.
Late medications with exceptions are now properly logged in the Already Passed section of eMAR.
The **Insurance (Billing) widge**t will now display user-input copay and deductible amounts exactly as they were entered, rather than rounding to the nearest whole number.
A pop-up displays when entering **duplicate programs** in the Program fields. In addition, when a program has been entered out of sequence a **Missing Programs** pop-up will display.
Some Agencies were experiencing an issue on the Census Billing page, where clients who are currently discharged, but were active on the date the census was run, were not being displayed in the grid. Census Billing users will now see currently-discharged clients on their Census Billing page if the client was active on the selected date.

Back to Top