

NEXTSTEP SOLUTIONS[®]

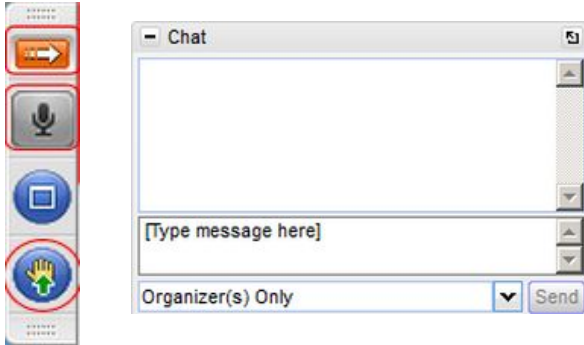
Moving Behavioral Health Forward

Portal

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Housekeeping

- If calling in on the telephone, you must enter your audio pin to ensure best audio quality.
- Attendees will be muted to begin. If you have a question type your question into the chat. There will be time at the end to answer questions.



Objectives

In this session you will learn how to:

- Portal Setup and Maintaining Settings
- Sign up a Client for Portal
- Client's View in Portal

Advantages of Patient Portal Utilization

What are the benefits of implementing a patient portal?

1. Your agency can customize what your clients can have access to in their portal account.
2. Sending forms to clients
3. Communication with Clients

Portal in NextStep Solutions

Let's Take a Look

Portal Setup

Path: Main Menu > Admin Tools> System Setup (Supplemental) > Client Portal Configuration

The screenshot shows the NextStep Solutions user interface. On the left is a dark blue sidebar with the logo and user information: Harper Garrett (hgarrett) @ NS, Residential Recovery Center. Below this is a 'MAIN MENU' section with various options: REMINDERS (7), MESSAGE CENTER (0), SCHEDULER, CHANGE PASSWORD, MAINTAIN USERS, CHANGE LOCATION, PRINT, HELP CENTER, and LOGOUT. The main content area is light blue and contains four panels: 'Admissions' (Face Sheet, Pre-Admit Forms, Bed Management, Program Transfer or Client Discharge, Case Assignments), 'Clinical Forms' (Assessment Forms, Scheduled Forms, Unscheduled Forms, Follow-Up Post-Discharge Forms, Weblink Inbox - Attach Forms), 'Reports' (Administrative Reports, Document Center, Reports, Personal Productivity, Export Form Data, eMAR Reports), and 'Admin Tools' (Treatment Plan Template and Program Setup, System Setup, System Setup (Supplemental), Form Builder, Bed Setup, Header Setup, Menu Setup - Report Setup). Red arrows indicate the path from Admissions to Clinical Forms, and from System Setup (Supplemental) to the next screen.

The screenshot shows the 'SYSTEM SETUP (SUPPLEMENTAL)' menu. The title is in large white letters on a blue background. Below the title is a list of configuration options: Location Configuration, PCP Section, Demographics Configuration, Client Portal Configuration (highlighted with a red rounded rectangle), Billing Configuration, Scheduler Configuration, and Web Link Configuration.

Portal Setup: Portal Menu Permissions

Portal Permissions:

- Allow Client vs Allow Representative
- Medications/ Diagnosis
- Messages
- Appointments
- Action Log

Portal Note Permissions:

- Allow Client to View
- Client Must Sign

Portal Menu Permissions

Title	Allow Client	Allow Representative
Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Billing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Medications/Diagnoses	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Action Log	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Preview changes Save changes Cancel changes

Portal Note Permissions

Note Type	Allow Client to View	Client Must Sign
Case Manager Summary	<input type="checkbox"/>	<input type="checkbox"/>
Chart Note	<input type="checkbox"/>	<input type="checkbox"/>
Group Narrative	<input type="checkbox"/>	<input type="checkbox"/>
Med Narrative	<input type="checkbox"/>	<input type="checkbox"/>
Medical	<input type="checkbox"/>	<input type="checkbox"/>
Misc Note	<input type="checkbox"/>	<input type="checkbox"/>
DSM5 Transition Notes	<input type="checkbox"/>	<input type="checkbox"/>
Eligibility Check Notes	<input type="checkbox"/>	<input type="checkbox"/>
Mindless Notes	<input type="checkbox"/>	<input type="checkbox"/>
New Test Notes	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 2 (11 items) < [1] 2 >

Preview changes Save changes Cancel changes

Portal Setup

Path: Main Menu > Admin Tools> System Setup (Supplemental) > Scheduler Configuration

The screenshot shows the NextStep Solutions user interface. On the left is a dark blue sidebar with the logo and user information: Harper Garrett (hgarrett) @ NS, Residential Recovery Center. Below this is a 'MAIN MENU' section with various options: REMINDERS (7), MESSAGE CENTER (0), SCHEDULER, CHANGE PASSWORD, MAINTAIN USERS, CHANGE LOCATION, PRINT, HELP CENTER, and LOGOUT. The main content area is light blue and contains four panels: 'Admissions' (Face Sheet, Pre-Admit Forms, Bed Management, Program Transfer or Client Discharge, Case Assignments), 'Clinical Forms' (Assessment Forms, Scheduled Forms, Unscheduled Forms, Follow-Up Post-Discharge Forms, Weblink Inbox - Attach Forms), 'Reports' (Administrative Reports, Document Center, Reports, Personal Productivity, Export Form Data, eMAR Reports), and 'Admin Tools' (Treatment Plan Template and Program Setup, System Setup, System Setup (Supplemental), Form Builder, Bed Setup, Header Setup, Menu Setup - Report Setup). Red arrows indicate the navigation path from Admissions to Clinical Forms, and from Clinical Forms to System Setup (Supplemental).

The screenshot shows the 'SYSTEM SETUP (SUPPLEMENTAL)' menu. The title is in large white letters on a blue background. Below the title is a list of configuration options: Location Configuration, PCP Section, Demographics Configuration, Client Portal Configuration, Billing Configuration, Scheduler Configuration (highlighted with a red box), and Web Link Configuration.

Portal Setup: Self Schedule Configuration

Scheduler Templates						
Apt Tem Name	Default Status	Activity	Location	Duration	Show in Portal	
90791 - INITIAL ASSESSMENT 2013	None	■ 90791 - Initial	/ Troy	45 minutes	<input type="checkbox"/>	
90792 - ANNUAL PSYCHIATRIC EVAL	None	■ 90792 - Annual Psychiatric Eval	/ Troy	45 minutes	<input type="checkbox"/>	
90832 - INDIVIDUAL HALF SESSION 30 MIN (16-37MIN)	None	■ 90832 - Half Session	/ Troy	30 minutes	<input checked="" type="checkbox"/>	
90833 - THERAPY W/E/M	None	□ 90833 - Therapy w/ E/M	/ Troy	30 minutes	<input type="checkbox"/>	
90834 - INDIVIDUAL SESSION 45 MIN (38-52MIN)	None	■ 90834 - Individual Session	/ Troy	45 minutes	<input checked="" type="checkbox"/>	

Scheduler Time Blocks													
New	Block Name	Block Color	Caption	Start Time	Stop Time	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Show in Portal
Edit	Available time X	■ #00FFFF	Use this time to schedule	10:00 AM	2:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Individual Therapy	■ #FFFF00	Indiv. Therapy	1:00 PM	4:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Block Name:*

Block Color:

Caption:*

Start Time:*

Stop Time:*

Mon:

Tues:

Wed:

Thurs:

Fri:

Sat:

Sun:

Show in Portal:

Portal Templates:

Resources:

Update Cancel

Portal Setup: Self Schedule Configuration

These are statuses the client will see when they self schedule in the portal, as well as the status that will appear in your web scheduler.

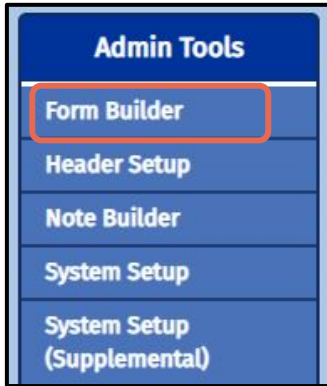
CLIENT PORTAL SETTINGS

Client Confirm Status:	<input type="text" value="Confirmed : Portal"/>	<input type="button" value="✕"/>	<input type="button" value="▼"/>
Client Cancel Status:	<input type="text" value="Cancelled : No Charge"/>	<input type="button" value="✕"/>	<input type="button" value="▼"/>
Client Cancel Status (less than 24 hr notice):	<input type="text" value="Cancelled : Charge"/>	<input type="button" value="✕"/>	<input type="button" value="▼"/>

Portal Setup: Setting up Forms for Clients to Complete

Path: Main Menu > Admin Tools > Form Builder > Select Form > Edit This Form

1



A vertical menu titled "Admin Tools" with the following items: Form Builder, Header Setup, Note Builder, System Setup, and System Setup (Supplemental). The "Form Builder" item is highlighted with a red rectangular box.

2



The "FORM BUILDER" interface features a blue header with the text "FORM BUILDER" in white. Below the header is a light blue bar containing a dropdown menu labeled "SELECT FORM:" with the selected option "Financial Agreement and Business Policy (Intake Form)".

3



A blue rectangular button with the text "Edit This Form" in white.

4

Date of Service Friendly:	<input checked="" type="checkbox"/>	If checked this form will automatically include a Date of Service field
Time of Service Friendly:	<input type="checkbox"/>	If checked this form will automatically include a Date of Service + Time field
Service Location Friendly:	<input type="checkbox"/>	If checked this form will automatically include a Service Location field
Client Portal Accessible:	<input checked="" type="checkbox"/>	If checked this form will be able to be started by Clients in the Client Portal
Limit Viewing to Author:	<input type="checkbox"/>	If checked, the form can only be viewed by the person who filled it out and Administrators.

Enrolling Clients Workflow

Path: Main Menu > Admissions > Facesheet

Location:

Case Assignments

Note: changing a program creates a Transfer Form that gets signed and sealed automatically.

Primary Program:

Secondary Program:

Third Program:

Primary Admission Date:

Secondary Admission Date:

Third Admission Date:

Primary Clinician:

Secondary Clinician:

Clinician Supervisor:

CLIENT PORTAL

Client Refused Portal Login:

Agency Portal URL: <https://www2.nextstepms.com/demo/Portal.aspx>

Portal Username	Representative	Active	Portal User Email
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No data

Enrolling Clients Workflow

Portal Login

Portal Username: * DoraT77

Reset Password:

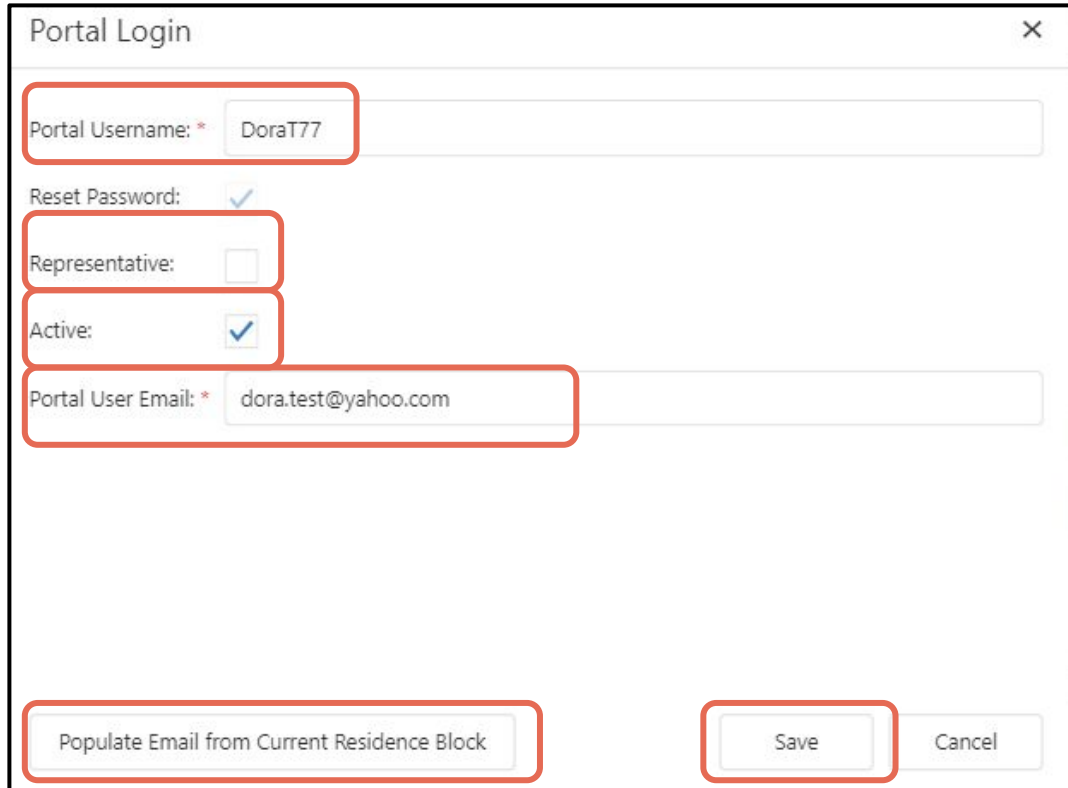
Representative:

Active:

Portal User Email: * dora.test@yahoo.com

Populate Email from Current Residence Block

Save Cancel



Portal Setup: Setting up Forms for Individual Clients

Path: Main Menu > Clinical Forms > Unscheduled Forms > Select Form

The screenshot displays the NextStep Solutions portal interface. On the left is a dark blue sidebar with the logo and user information: "NextStep Solutions (NextStep) @ Universal - FG" and "Aguili, Karla". Below this is a "MAIN MENU" section with "REMINDERS" (23), "MESSAGE CENTER" (0), and "SCHEDULER". The main content area is light blue and features two vertical panels. The left panel is titled "Admissions" and contains: "Face Sheet", "Pre-Admit Forms", "Transfer Forms-Discharge Forms", "Client Search", and "Payment Center". A red arrow points from this panel to the right panel, titled "Clinical Forms". The "Clinical Forms" panel contains: "Assessment Forms", "Scheduled Forms", "Unscheduled Forms" (highlighted with a red rounded rectangle), "Follow-Up Post-Discharge Forms", "Pending Weblink Forms Inbox", and "MOST Interactive - Audit and Compliance".

Portal Setup: Setting up Forms for Individual Clients

EXTERNAL REFERRAL INITIATION FORM

NextStep Testing
1202 Walton Blvd
Rochester Hills, Michigan 48307
Phone 248-656-7504

Name: Test, Dora
Date of Birth: 6/26/1976
Case #: 1035182-1
Program: Outpatient MH

* Date of Service

10/19/2022

Referral Date

10/03/2022

Date Authorization for Release was Obtained

10/10/2022

Reason for Referral

Needing full services

Referral Information

Name of Agency Where Referred	Contact Person at Referral Agency	Address of Agency	City/State/Zip	Referral Agency Phone
ABC Hospital	Chris Smith	123 Hospital Blvd	Anywhere, FL 35414	555-587-5555

Follow-Up Appointments (Psychiatric, medical, lab, etc. and include provider and date of appointment)

Client: Test, Dora | Date of Birth: 6/26/1976

Save

Save and Exit

Save and Print

E-Signature/Seal

Assign To

Save and Send to
Patient Portal

Portal Setup: Setting up Forms for Individual Clients

Send Form to Patient Portal

DTest76

Cancel OK

A dialog box with a black border. At the top, the text "Send Form to Patient Portal" is displayed in a bold, dark grey font. Below this is a rounded rectangular dropdown menu with a black border, containing the text "DTest76" and a small downward-pointing chevron icon on the right side. At the bottom of the dialog box, there are two buttons: a grey button with the text "Cancel" and a blue button with the text "OK".

The Client Experience

Client View in Portal: Logging In

Path: Client Portal URL (located in client portal section on facesheet)

CLIENT PORTAL

NEXTSTEP
SOLUTIONS[®]

Username:

Password:

[Forgot Your Password?](#)



Client View in Portal: Messages

NEXTSTEP SOLUTIONS

Client Portal
Logged in as:
Dora Test
(DTest76)

LOG OUT
APPOINTMENTS
DIAGNOSES AND MEDS
MESSAGES
DOCUMENTS
BILLING
ACTIVITY
RESET PASSWORD

Search in Messages


Inbox 1
Sent
Draft
Deleted

+ New Message Select All

Appt Scheduling
hgarrett1
Good Afternoon, You now are able to schedule an appointment from the schedule...

Client View in Portal: Appointments

CLIENT APPOINTMENTS

 New Appointment

Date	Time	Resource	Activity	Location	Status	Confirmed	Actions
10/19/2022	9:00 AM	NextStep Solutions	 90834 - Individual Session	 Troy		<input type="checkbox"/>	

Client View in Portal: Appointments

Schedule New Appointment

Appointment Type:* 90834 - INDIVIDUAL SESSION 45 MIN (38-52MIN) (45 minutes)

Appointment With:* NextStep Solutions

Find Times

Date	Start	End	Provider	Duration
10/21/2022	01:00:00 PM	01:45:00 PM	NextStep Solutions	45 minutes
10/21/2022	01:45:00 PM	02:30:00 PM	NextStep Solutions	45 minutes
10/21/2022	02:30:00 PM	03:15:00 PM	NextStep Solutions	45 minutes
10/21/2022	03:15:00 PM	04:00:00 PM	NextStep Solutions	45 minutes
10/24/2022	01:00:00 PM	01:45:00 PM	NextStep Solutions	45 minutes
10/24/2022	01:45:00 PM	02:30:00 PM	NextStep Solutions	45 minutes
10/24/2022	02:30:00 PM	03:15:00 PM	NextStep Solutions	45 minutes
10/24/2022	03:15:00 PM	04:00:00 PM	NextStep Solutions	45 minutes
10/26/2022	01:00:00 PM	01:45:00 PM	NextStep Solutions	45 minutes
10/26/2022	01:45:00 PM	02:30:00 PM	NextStep Solutions	45 minutes
10/26/2022	02:30:00 PM	03:15:00 PM	NextStep Solutions	45 minutes

Note to Provider:

Cancel Save

Client View in Portal: Appointments

Date	Time	Resource	Activity	Location	Status	Confirmed	Actions
10/21/2022	3:15 PM	NextStep Solutions	90834 - Individual Session	Troy	Confirmed : Portal	<input checked="" type="checkbox"/>	Confirm Cancel
10/19/2022	9:00 AM	NextStep Solutions	90834 - Individual Session	Troy		<input type="checkbox"/>	

3 PM


C Test, Dora (1035182)

30

Patient Portal Confirmed Appointment -

4 PM

Client View in Portal: Diagnosis and Meds



CLIENT DIAGNOSES AND MEDICATIONS

Diagnoses

Diagnosis Code	Diagnosis Text	Onset	Resolved Date	Resolved
F11.29	Opioid dependence with unspecified opioid-induced disorder	9/6/2022		<input type="checkbox"/>

Active Medications

Med Title	Dosage	Frequency	Start Date
No data to display			

Inactive Medications - Click to Expand/Collapse

Client Portal
Logged in as:
Dora Test
(DTest76)

LOG OUT

APPOINTMENTS

DIAGNOSES AND MEDS

MESSAGES

Client View in Portal: Activity

NEXTSTEP SOLUTIONS		CLIENT ACTION LOG	
		Actions	
<u>Action</u>	<u>Description</u>	<u>Timestamp</u>	
Login	Patient Portal login by DTest76	11/23/2022 09:39:44 AM	
Reset Password	Password changed by DTest76	11/23/2022 09:39:26 AM	
Login	Patient Portal login by DTest76	11/23/2022 09:38:11 AM	
Profile Updated	Portal Login DTest76 was modified by hgarrett. Changes: Password reset	11/23/2022 09:37:22 AM	
Login	Patient Portal login by DTest76	11/23/2022 09:36:33 AM	
Login	Patient Portal login by DTest76	11/23/2022 09:35:10 AM	
Login	Patient Portal login by DTest76	10/19/2022 10:35:42 AM	
Logout	Patient Portal logout by DTest76	10/19/2022 10:34:02 AM	
Login	Patient Portal login by DTest76	10/19/2022 10:33:44 AM	
Profile Updated	Portal Login DTest76 was created by hgarrett.	10/19/2022 10:05:03 AM	

NEXTSTEP SOLUTIONS

Client Portal
Logged in as:
Dora Test
(DTest76)

LOG OUT

APPOINTMENTS

DIAGNOSES AND MEDS

MESSAGES

DOCUMENTS

BILLING

ACTIVITY

RESET PASSWORD

Client View in Portal: Documents

NEXTSTEP SOLUTIONS

Client Portal
Logged in as:
Dora Test
(DTest76)

LOG OUT

APPOINTMENTS

DIAGNOSES AND MEDS

MESSAGES

DOCUMENTS

BILLING

ACTIVITY

RESET PASSWORD

DOCUMENT CENTER

Start a new form:*

Continue document

View complete

Document Name

Alcohol Screen Questionnaire (AUDIT)

ASAM Admission Level 1 Outpatient Services

Consent for Release of Information

Informed Consent for Telehealth Treatment

Kim's Most Excellent Form

Mental Status Exam (MSE)

Test5

Started By

hgarrett1

Start

Apply

Start a new form:*

Continue document

View completed document

Continue document (submitted)


View education resources

Signature required

Start

Apply

Client View in Portal: Documents



DOCUMENT CENTER

Client Portal
Logged in as:
Dora Test
(DTest76)

LOG OUT

APPOINTMENTS

DIAGNOSES AND MEDS

MESSAGES

DOCUMENTS

BILLING

ACTIVITY

RESET PASSWORD

Start a new form:*

Continue document Continue document (submitted) Signature required


View completed document View education resources

Start

Apply

Document Name	Action	Date Of Service	Started Time Stamp	Started By
External Referral Initiation Form	Continue document	10/19/2022	10/19/2022 10:26 AM	hgarrett1

Client View in Portal: Reset Password



CHANGE PASSWORD

Client Portal
Logged in as:
Dora Test
(DTest76)

[LOG OUT](#)

[APPOINTMENTS](#)

[DIAGNOSES AND MEDS](#)

[MESSAGES](#)

[DOCUMENTS](#)

[BILLING](#)

[ACTIVITY](#)

[RESET PASSWORD](#)

Current Password:*

New Password:*

Confirm Password:*

Email:*

Accessing NSS Help Center

The screenshot displays the NextStep Solutions web application interface. On the left is a dark blue sidebar menu with the following items: MAIN MENU, REMINDERS (with a red circle containing the number 9), MESSAGE CENTER (with a red circle containing the number 3), SCHEDULER, CHANGE PASSWORD, MAINTAIN USERS, CHANGE LOCATION, PRINT, **HELP CENTER** (highlighted with a red rectangular border), IDEAS PORTAL, and LOGOUT. The top of the sidebar features the NextStep Solutions logo and the user's name and location: Harper Garrett (hgarrett) @ NS Residential Recovery Center. The main content area on the right is light blue and contains two panels. The top panel is titled 'Admissions' and lists: Face Sheet, Pre-Admit Forms, Bed Management, Program Transfer or Client Discharge, and Case Assignments. The bottom panel is titled 'Reports' and lists: Administrative Reports, Document Center, Reports, Personal Productivity, Export Form Data, and eMAR Reports.

Resources

- [Portal QRG](#)
- [Portal Help Center Articles](#)

If you have questions related to your existing portal, please contact Support:

1. Email Support @ support@nssbehavioralhealth.com
2. Call Support @ 248-309-3402, option 3
3. Click on the Support Hub Button on the NextStep Solutions Help Center

Support Quick Links

 Support Hub

If you would like to have one on one training, or would like more information on setting up a new portal, please contact your account manager:

1. Email Account Managers @ accountmanagers@nssbehavioralhealth.com

Q&A