

NextStep Solutions Version 7.0 Release Notes  
*All content is subject to change.*

This is pre-release documentation, and all content is subject to change.

**Release Date:** May 24, 2023

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### New Features/Functionality

#### Service Bundle Form Menu Option

You will now have the ability to bundle services within the new Services Bundle Form. This will allow our users to bundle service as needed for various billing scenarios. This new feature is aimed at providing enhanced convenience and streamlining billing for our users.

The updates include a new menu option, advanced filtering options, and automated creation of billable services based on activity code rules. New features will include:

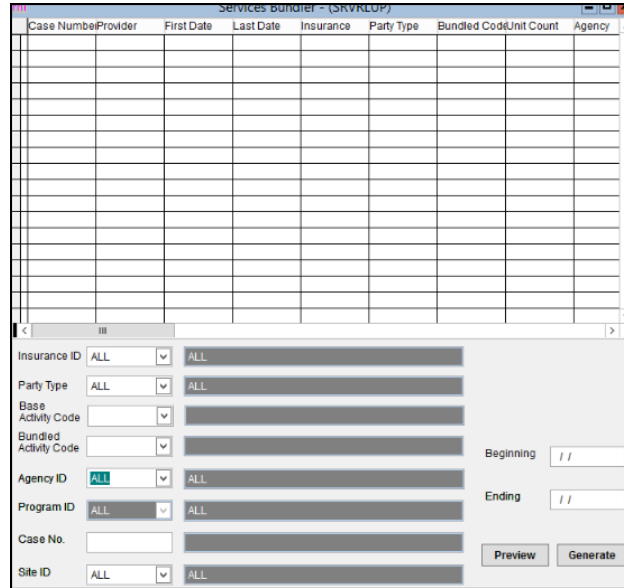
- New menu option for direct access to the service bundle form from the Main Menu.
- Advanced filtering options for refined searches and multiple filter combinations.
- Automated creation of billable services based on activity code rules.
- These updates improve convenience, streamline access, and enhance the overall service bundle experience.

Click [here](#) to learn more about Bundle Services.

**Service Bundle Forms, Filters, and Buttons**

Path: File > Services > Services > Services - Bundle

Users will have advanced filtering options and multiple filter combinations. This integrates data from the Activity Code Bundle form, automating the creation of billable services for open line items based on the base activity code rule.



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## Improved Functionality

<p><b>Line Item Marked as Closed When Bundled</b></p>	<p>Line items that have been bundled into a bundled service using the new service bundler will automatically be closed once the bundled service is created.</p>
<p><b>Auto-Assign Print Status of N Activity Code Option</b></p>	<p>If an activity code has been assigned as a base code in the activity code roll up form, when a line item is created for that activity code, a print status of N will automatically be applied to that line item when the service is calculated.</p>
<p><b>Daily Bundling</b></p>	<p>If the Daily box is checked in the Activity code roll up form for a bundling set up, when the service bundler form is run, one service per day for the date range entered will be created.</p>
<p><b>Back to List Button</b></p>	<p>When adding or editing in the Activity Code Roll Up form, the back to list button will be inactive so that users cannot leave the form until the setup is saved or canceled.</p>

<p><b>Bundle Activity Codes Setup Form</b></p>	<p>The Activity Code Services Bundle Form will allow users the ability to identify and assign activity codes for roll up purposes.</p> <p><b>Note:</b> Currently users are limited to creating Bundle Activity Codes that are associated with:</p> <ul style="list-style-type: none"> <li>• A single Insurance or across all Insurances</li> <li>• A single Program or across all Programs</li> <li>• A single Agency or across all Agencies.</li> </ul>
<p><b>Automate Time Thresholds to Add Together</b></p>	<p>If the Bundle time box is checked on the Activity code roll up form, when the service bundler is used to create a bundled service for that activity code, the timing for all the line items that are bundled into the new service will be added together and applied to the bundled service.</p>
<p><b>Billing Logs - Exporting Billing Logs</b></p> <p><i>File &gt; Claim Processing &gt; Invoicing &gt; 837 Outbound</i></p>	<p>Users will now get a Save As Window when saving Billing logs in the services or transactions forms instead of the Select Directory window. This improves the usability and makes it easier to access and read these logs.</p> <p>To view the logs go to File &gt; Claim Processing &gt; Invoicing &gt; 837 Outbound</p>

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## Resolved Issues

<p><b>Deleted adjustments creating unapplied private payments</b></p>	<p>Adjustment transactions that are deleted from private pay line items will no longer create an unapplied private payment record.</p>
<p><b>Staff Enrollment Override</b></p>	<p>A Staff Enrollment Override by insurance will now save appropriately if a specific insurance is entered when saving the form.</p>
<p><b>Error Message</b></p>	<p>Users will no longer receive an error when using the Defaults button in the Service form.</p>
<p><b>Duplicate diagnosis codes in claim file</b></p>	<p>Users were receiving clearinghouse rejections due to diagnosis being repeated within a claim file. This has been corrected so that codes will no longer repeat within an 837 claim file.</p>

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