Beta Clinical Release Notes 11.5.0

NextStep Solutions Version 11.5.0 Release Notes

All content is subject to change.

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

Release Date: November 5, 2023 (General Release)

Release Contents

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

NextStep Solutions Enhancements

Enhancements were made to the following areas of the software in version 11.5.0:

- Billing
- Client Portal
- System Setup (Supplemental)
- Dispensing
- Resolved Issues/Bugs

Billing	
Billing configuration: Change field checkbox selection to reference dropdown	We've made some adjustments to the Billing Configuration screen. The "Field" field has been renamed to "Reference" and has been changed to a drop down. Formerly these were checkboxes and errors were arising due to more than one checkbox being checked. Changing this to a dropdown will keep this from happening going forward.
Census Billing Default Fields	We've made an improvement to the default field for Census Billing within system Setup (Supplemental). Depending on the type of census billing field (Dropdown, User Dropdown, Number, or Diagnosis code) users will only be given option that apply to that field resulting in fewer errors

Client Portal	
Send Treatment Plans to the portal for a client to View & Sign	● Treatment plans can now be sent to the client portal for client's to view and sign. Clients can access their Treatment Plans from the Document Center on the portal. If the treatment plan needs a signature, Signature Required will show in the action needed column. If no action is required for the Treatment Plan then View Complete Document will show in the action column. ● If a Treatment Plan has been finalized and signed by both an NSS user and the client, when a change is made to the treatment plan the client will need to sign the Treatment Plan again. Signature Required will again show in the Action column. ● Clients will be able to see the status of the treatment plan from the portal and a date it was sent to the portal. In the Plan status section there are 2 options that will show next to the End Date. ○ "Expected" means the treatment plan is still active and that plan's End Date can still be changed. ○ "Actual" means the plan has been ended (via review wizard, discharge)
Enable/Disable treatment plan elements in the portal treatment plan	Agencies can designate which sections of the Treatment plan are visible on the client portal. When users navigate to System Setup (Supplemental)>Client Portal Configuration under Displayed Treatment Plan Section Users can use the checkboxes in the "Display in Client Portal?" column to choose which sections of the treatment plan will be visible on the client portal. If no options other than Header are enabled, no treatment plan information will appear in the portal. These sections do not work retroactively. If a Treatment Plan has already been sent to the Client Portal and a section is enabled/disabled it will not change Treatment plans already in the portal.
Portal Message Emergency notification *System Setup (Supplemental) -> Client Portal Configuration*	We've added an emergency message to the client portal. When a client selects "create new message" in the message center on the portal a popup will show stating "If this is a medical emergency please call 911 immediately. Portal messages should not be used for medical emergencies". The message will also show along the top of the message center. ● If the agency wishes this message is configurable within System Setup (Supplemental)>Client Portal Configuration.

System Setup (Supplemental)	
Add a search function for Dropdown Templates	A search function has been added to the Dropdown template section of System Setup (Supplemental) making it much easier for users to find the dropdown template they are looking for.

Dispensing	
Holds and alerts are now removed upon discharge	We've made an improvement that when a client is discharged then any pending alerts/holds will be cleared. This way if they are readmitted users will no longer see old alerts. If users need to reinstate these alerts they will need to undischarge this client using the Undischarge button in the Document Center.

Back to Top

Resolved Issues

Issue: Field references on forms are sometimes displaying inaccurate or out-of-date information. **Resolution**: Field references now work as expected.
Issue: Users who clicked on Message Center after admins disabled it were asked to log out. **Resolution:** If an admin turns off the Message Center, users will no longer be able to access it.

Back to Top