

Field Types That Can be Added to Forms or Notes

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About

The table below contains a list of types of fields that can be added to Forms and/or Notes in NextStep Clinical. Note that certain fields may only be available on specific types of Forms and Notes. If you are trying to add a field below to a Form or a Note and you do not see it in the Type drop-down menu, then that type of field cannot be added to the Form or Note Type. "Legacy" refers to Fields Types that are no longer in use.



Tip: To quickly search this table, use the Filter and Sort options. Java must be enabled in order to use these capabilities.

- **Filter**: Enter specific keywords into the Filter field. The rows in the table will be filtered to only display results that match what you typed into the Filter field. Do not use commas to separate keywords.
- Sort: Click one of the column headers to sort that column from A-Z or Z-A.



| <u>Field Type</u> | <u>Description</u> |
|-------------------|--|
| | Displays fields where you can enter the number of dependents and income (mont or yearly) and calculate how much money the client is able to pay. The result is calculated based on the Ability to Pay rules that are set up by your Agency in Adm Tools Menu > Ability to Pay Setup. |
| | ABILITY TO PAY |
| Ability to Pay | Dependents 1 |
| | Income 18000 |
| | O Monthly |
| | Yearly Calculate |
| | Result 5 % pay |
| Appointment Link | Displays a drop-down list of Kept Appointments which you can associate to the Form/Note this field is added to. |
| 7 | Appointment Link (3/29/2022 9:30:00 AM - 3/29/2022 10:00:00 AM 90791 - Initial at Troy with Next) |





| <u>Field Type</u> | <u>Description</u> | | | | |
|------------------------|---|--|--|--|--|
| Appointment List | Displays appointments based on number of appointments rath displays the last 5 appointments in the past that were not mark type and the next 5 appointments in the future not marked with From this list, you can mark the client as seen by clicking the greate a follow-up appointment by selecting a specific date an Create a New Appointment button, a new appointment is creat choosing at noon and the Resource is the logged-in user. Naviged the appointment as necessary. Date | red with a KEPT status on a KEPT status type. Ireen checkmark and of time. If you click the ted on the date of your gate to Scheduler to | | | |
| Average | Displays a field that calculates the average of the fields for the indicated. It is important to make sure the Group number is the you want to average. If the Form this field is added to is filled a select the Key Indicator checkbox to see changes over time gr Document Center. See Configure Field Groups for Average, To Count Field Types. Integer Input 1: Integer Input 2: Integer Input 3: Average of Inputs 1, 2 and 3: | e same for the fields out more than once, aphed in the client's | | | |
| Barcode | Displays a barcode for the checkbox(es) selected within the field ID. Barcode: 1021669-14520-37766-1285218 | | | | |
| Body Region | Displays an image of the body where users can select where the is typically used in a Physical Therapy setting. | ne client feels pain. This | | | |
| Body Text DISPLAY ONLY | Displays a body of text. Body Text is useful for Forms that hav text for signing contracts/agreements, etc. Use if text spans meters to the does not have a Header, so it is suggested to use a Header Text starts. | nultiple lines. Note : Body | | | |





| <u>Field Type</u> | <u>Description</u> | | | | |
|---------------------|--|---|--|--|--|
| Chart Fill Table | Used to auto-populate a Chart Fixed Row field type from one Form to another. If a user modifies the Chart Fixed Row on the current Form they are accessing, it does not change the data on the Form it is referencing. | | | | |
| Chart Fixed Rows | Displays a set number of rows and columns. Columns of Dropdown, Yes/No, Date, Double, Integer, Memo, or Tex the Hide Empty Rows/Columns checkbox. Information for fixed rows: Running Time Place | | | | |
| Chart Variable Rows | Displays a set number of columns. Columns can only have yes/No, Date, Double double, Integer, Memo, or Text. Al add a row as needed. Chart Variable Rows Select Row Columns No Data To Display Add New Row | lows the user of the Form to | | | |
| Client Groups | Displays a list of Groups where you can add or remove a Form or Note the field was added to. See Add Client Grofor more details. Client Groups Name Art Therapy M-F, Demo Group Family Empowerment T/Th | | | | |
| Contact Block | Displays a listing of fields to collect contact information Example of fields that can be disconnected information without having to creat Name: Address: City: Phone: Relationship: Email: Field choices: Include Relationship: Ves | zsplayed: te individual fields. Zip Code: (Cell) | | | |
| | Include Name: Include Country: Include Fax: Incl | cated. It is important to make | | | |
| Count | field is added to is filled out more than once, select the changes over time graphed in the client's Document Ceroups for Average, Total, Min/Max, and Count Field Total Integer Input 1: Integer Input 2: Integer Input 3: Count of Inputs 1, 2 and 3: | Key Indicator checkbox to see nter. See Configure Field | | | |





| <u>Field Type</u> | <u>Description</u> |
|-----------------------------|--|
| | Displays a date field. |
| Date | I understand that this authorization will expire on: |
| Diagnosis/Diagnosis (DSM-V) | Displays a field used to search for a diagnosis. If your Agency needs ICD-10 options to show here, contact Support and provide the setup variable ShowDxTypes. DIAGNOSIS (DSM-5) To use the search, you must enter a minimum of three characters to search then click the search button next to the box. You may also click the list all button next to the search button if desired. Search List All |
| Document Upload | Displays a button used to upload or scan a document into a client's chart. SeeScan and Import into NextStep. Document Upload: Upload/Change Document No document uploaded yet. |
| Double | Displays a field where you enter non-integer numbers with decimal points. This field can be grouped with other Integer, Double, and Select One Only field types. See Configure Field Groups for Average, Total, Min/Max, and Count Field Types Double Input: 4.5678 |
| Dropdown | Displays a drop-down field. Drop-down options are ordered alphabetically by default. To manually put them in a specific order, select the Specify Order of Choices checkbox. If a particular answer in the drop-down will be used by Clinicians most of the time, check the Default checkbox to have the drop-down always default to that answer. To optimize for tablets or a pen, it is suggested to use the Select All That Apply field type. |
| Dropdown Template | Drop-down template options are built ahead of time inAdmin Tools > System Setup (Supplemental) > Setup Dropdown Templates. The Dropdown Template field is added to a Form/Note and allows you to select which dataset to pull from that your Agency has set up in Setup Dropdown Templates. This allows you to add the same drop-down options across many Forms and Notes. This is typically used when building related Forms so you don't have to keep building out the same drop-down field. dropdown template field Select a value |
| Eligibility Check | Legacy field. Replaced by Realtime Eligibility Field Type. |
| Field Reference ONLY | Displays a field reference from another Form or Note butdoes not populate or associate it to any specific field in the Form it was added to. It is strictly for informational purposes only. To learn more about Auto-fill and above box field referencing for other types of fields, see Create a New Form. Field Reference ONLY Reference information from Primary Therapist on Face Sheet Kteam Provider |





| <u>Field Type</u> | <u>Description</u> | | | | | | |
|----------------------|--|--|--|--|--|--|--|
| Form Link | From the Form Builder, select the Forms you want to be available as options for your staff to select to link when completed. This field displays a drop-down that populates with instances of the selected Forms that have the most recent date of service on or before that of the Form with this field. When a Form is selected from the drop-down, it links the selected Form to the Form/Note so that you can easily access the completed Form by clicking on the attached link. | | | | | | |
| | Form Link field drop-down on draft Form Form Link Field Clinical Assessme Clinical Assessment Clinical Assessment | | | | | | |
| Form Name | Displays a field for a user to input a new Form name, which is how the Form will be displayed in the Document Center. This is a required field. This field type is commonly used when a Form contains a Document Upload field, so the user can name the Form to be a description of whatever is being uploaded, such as: "Lab Work 2017-10-01". * Form Name: The field will change the name of this instance of this form. | | | | | | |
| Header DISPLAY ONLY | Displays a blue header. Select the Collapsible radio button if you want to collapse every field beneath the Header, through to the next Header. HEADER | | | | | | |
| Horizontal Separator | Displays a line to visually separate one section of a Form from another. | | | | | | |
| Image Upload | Displays a button used to attach pictures to Forms. Image Upload: Upload/Change Image | | | | | | |
| | Displays the Insurance (Billing) widget, where you can view and enter a client's insurance information. Your Agency must be using the NextStep Billing Engine (VFO o VPO). Information updated here flows over to the Billing Engine. See Add Client Insurance Information for more details. | | | | | | |
| | † Priority Insurance Subscriber Num Group Number Subscriber First Name Subscriber Last Name Subscriber Relation Effective | | | | | | |
| Insurance (Billing) | * 1 AETNA 923455 488451 Bill Test Policyholder is the subscriber. ✓ Edit Deletta | | | | | | |
| | Effective Prom 1 Effective To 1 | | | | | | |
| | No Effective Dates Entered | | | | | | |
| | Copay / Deductibles: | | | | | | |
| | Effective From 1 Effective To 1 Act. Code Pays for Primary Copay Copay Deductible Deductible Met 90832 - INDIVIDUAL HALF SESSION 20-30 MINUTES 90791 - INITIAL EVALUATION GLOBAL S30 0% \$2,000 | | | | | | |
| Integer | Displays a field where you enter a whole number (no decimals or special characters). This field can be grouped with other Integer, Double, and Select One Only field types. See Configure Field Groups for Average, Total, Min/Max, and Count Field Types Enter A Whole Number: An integer cannot have a decimal or special characters | | | | | | |
| Linked Document | Used to link a document to the Form. An example would be linking an informational document that may be useful for the Clinician to view as they complete the Form. | | | | | | |

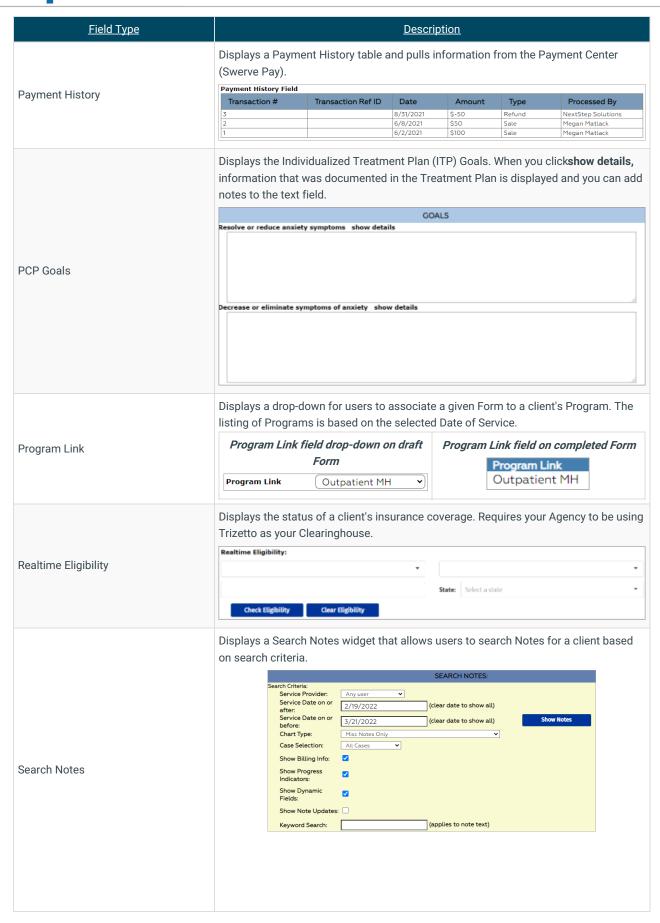




| <u>Field Type</u> | <u>Description</u> |
|--------------------|---|
| LOINC | This field is a Meaningful Use feature and displays a LOINC question and answers that you have selected in field setup for the question in a drop-down menu. Example of 72166-2 Tobacco Smoking NHIS: LOINC Field Tobacco smoking status NHIS Former smoker |
| Medication Listing | Displays a list of medications for a client. Medication / Dosage Instructions Start Date Notes No Active Medications at this time. |
| Memo | Displays a memo/note box. Additional Information/Description of Circumstances Please give examples |
| Min/Max | The Max option displays the highest number for a Group of given numbers. The Min option displays the lowest number for a Group of given numbers. If the Form this field is added to is filled out more than once, select the Key Indicator checkbox to see changes over time graphed in the client's Document Center. See Configure Field Groups for Average, Total, Min/Max, and Count Field Types. Example of Max option: Integer Input 1: Integer Input 2: Integer Input 3: Min/Max of Inputs 1, 2 and 3: 300 |
| Multi Image Upload | Displays an Upload/Edit Images button used to upload multiple images. Multi Image Upload: Upload/Edit Images |
| Pain Diagram | Displays a McGill Pain Questionnaire where users can select where the client feels pain. This is typically used in a Physical Therapy setting. |











| <u>Field Type</u> | <u>Description</u> | | | | | |
|-----------------------|--|--|--|--|--|--|
| Coloct All That Apply | Displays multiple answers and the ability to select all answers that may apply to a question. | | | | | |
| Select All That Apply | The following organizations were notified ✓ Community Treatment Services RRC Staff ✓ Other NextStep | | | | | |
| Select One Only | Displays options in a radio button format where a user can only select one answer. To add multiple choices, click the Add New Choice button after each choice is added. If you do not click this button, it will update the field you previously added. This field can be grouped with other Integer, Double, and Select One Only Field Types. See Configure Field Groups for Average, Total, Min/Max, and Count Field Types Marital Status: | | | | | |
| | Displays the selection of the signer from the Signer Type drop-down and a | | | | | |
| Signature | combination of the Use Topaz Signature or Use Touch Signature buttons. Signer Type:Select Signer Type Name: Signature: Sign on ePad Sign with Touch Sign with Topaz Comments: | | | | | |
| Stethoscope Audio | Legacy field. | | | | | |
| Text | Displays a text field. Field Name: | | | | | |
| Topaz Signature | Displays radio buttons to select Signer Type and a Use Topaz Signature button. Signer Type: NextStep User Client (Please click "Sign with Topaz" and oversee / assist the Client in signing.) Other (Please enter the Name of the signer below and indicate relationship with the Client then click "Sign with Topaz" and oversee / assist the signing. For example: Jane Doe, mother) Name: Sign with Topaz | | | | | |
| Total | Displays a field that sums/totals the fields for the Group number indicated. It is important to make sure the Group number is the same for the fields you want to total. If the Form this field is added to is filled out more than once, select the Key Indicator checkbox to see changes over time graphed in the client's Document Center. See Configure Field Groups for Average, Total, Min/Max, and Count Field Types | | | | | |
| . occ. | Integer Input 1: 8 Integer Input 2: 5 Integer Input 3: 3 Total Over Integer Inputs 1, 2 and 3: 16 | | | | | |
| Touch Signature | Displays radio buttons to select Signer Type and a Use Touch Signature button. Signer Type: NextStep User Client (Please click "Sign with Touch" and oversee / assist the Client in signing.) Other (Please enter the Name of the signer below and indicate relationship with the Client then click "Sign with Touch" and oversee / assist the signing. For example: Jane Doe, mother) Name: Sign with Touch Sign with Tou | | | | | |





| <u>Field Type</u> | | <u>Description</u> | | | | | | | |
|-------------------|--|--|-------------------|--------|----------------|------|--------------------------|-----------------|--|
| User Dropdown | | Displays a drop-down menu that contains a list of staff members who have a NextStep login. | | | | | | | |
| | Displays fields to collect information on a client's vitals. This field type requires the Form to have the Date Of Service Friendly checkbox selected. The metrics that are displayed in the vitals fields are configured in System Setup > Notes . **Configuration: | | | | | | | | |
| | | | DISPLAY VITALS: (| | | | | | |
| | Pulse 🔽 | BP (Systolic) ✓ | BP (Diastolic) ✓ | Weight | Temp | BMI | Height ✓ | Abdominal Girth | |
| Vitals | Glucose | Respiration 🗸 | Oxygen Level | | | | | | |
| | | Vitals fields: | | | | | | | |
| | Vitals: Pulse: Weight: Height: O2 Level: | bool lbs | - (-, | | mm Hg *F mg/dL | BMI: | Plastolic): irations: | mm Hg | |

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