Field Types That Can be Added to Forms or Notes

Last Modified on 09/09/2026 2:16 pm EDT

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.

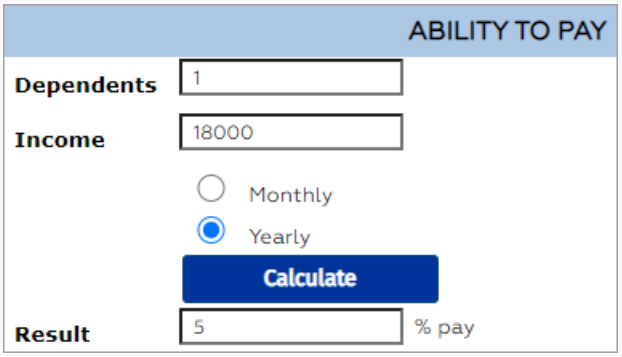
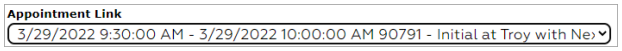
See also field validation and conditional fields.

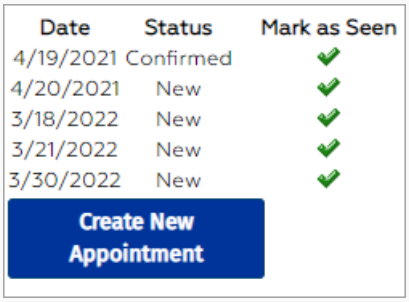
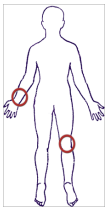
Tip: To quickly search this table, use the Filter and Sort options. Java must be enabled in order to use these capabilities.

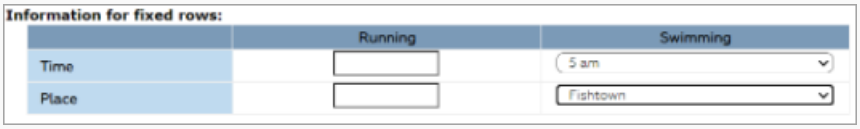
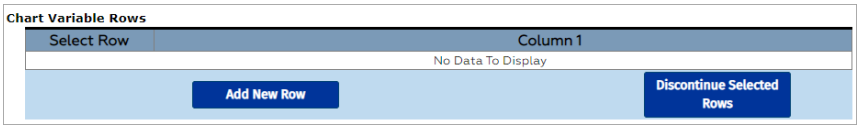
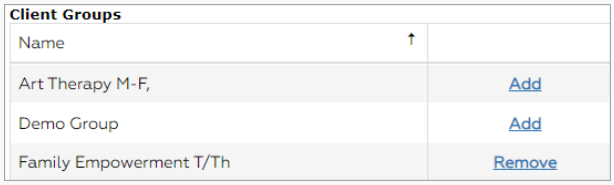
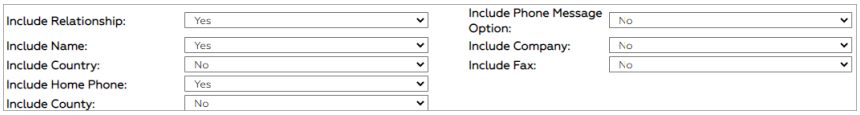
- **Filter**: Enter specific keywords into the Filter field. The rows in the table will be filtered to only display results that match what you typed into the Filter field. Do not use commas to separate keywords.
- **Sort**: Click one of the column headers to sort that column from A-Z or Z-A.

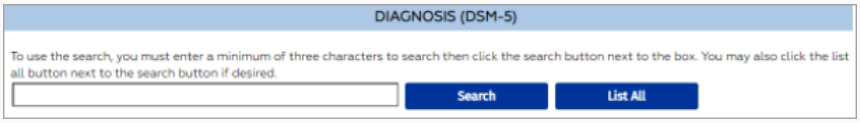
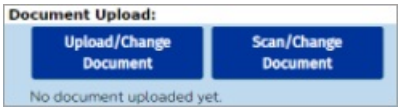
Show 50 entries

Filter:

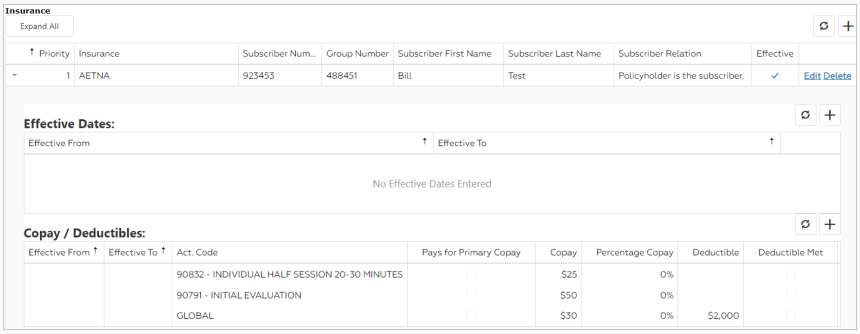
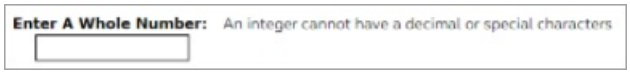
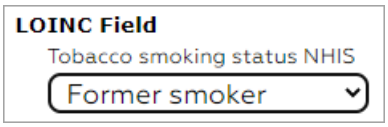
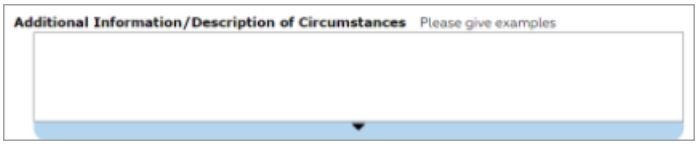
Field Type	Description
Ability to Pay	Displays fields where you can enter the number of dependents and income (monthly or yearly) and calculate how much money the client is able to pay. The result is calculated based on the Ability to Pay rules that are set up by your Agency in **Admin Tools Menu > Ability to Pay Setup**. 
Appointment Link	Displays a drop-down list of Kept Appointments which you can associate to the Form/Note this field is added to. 

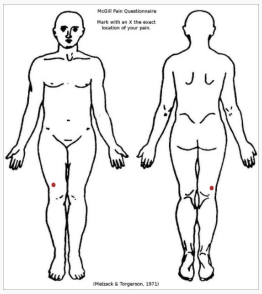
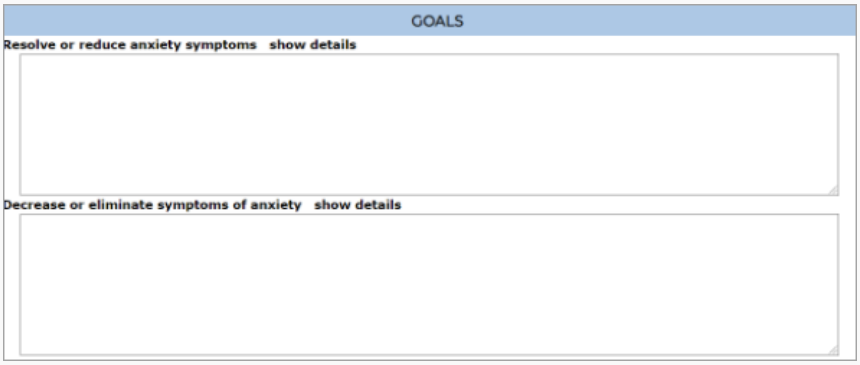
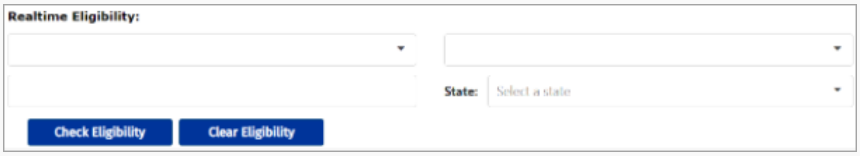
Field Type	Description
Appointment List	Displays appointments based on number of appointments rather than days. The field displays the last 5 appointments in the past that were **not** marked with a KEPT status type and the next 5 appointments in the future **not** marked with a KEPT status type. From this list, you can mark the client as seen by clicking the green checkmark and create a follow-up appointment by selecting a specific date and time. If you click the **Create a New Appointment** button, a new appointment is created on the date of your choosing at noon and the Resource is the logged-in user. Navigate to Scheduler to edit the appointment as necessary. 
Average	Displays a field that calculates the average of 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 average. 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**. 
Barcode	Displays a barcode for the checkbox(es) selected within the field setup: Patient ID, Visit ID, Form ID, and/or Field ID. 
Body Region	Displays an image of the body where users can select where the client feels pain. This is typically used in a Physical Therapy setting. 
Body Text DISPLAY ONLY	Displays a body of text. Body Text is useful for Forms that have explanatory text or text for signing contracts/agreements, etc. Use if text spans multiple lines. **Note**: Body Text does not have a Header, so it is suggested to use a Header field before the Body Text starts.

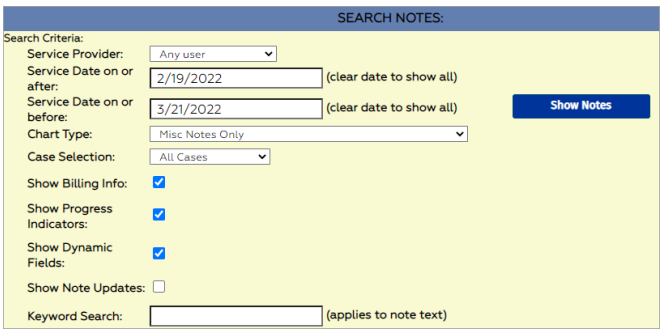
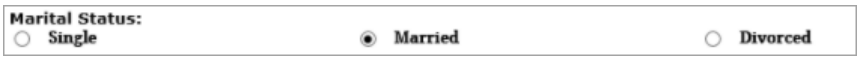
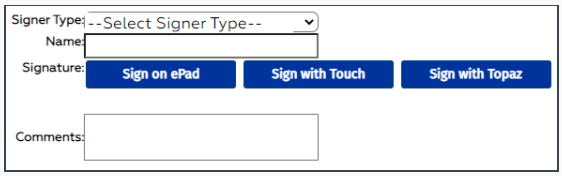
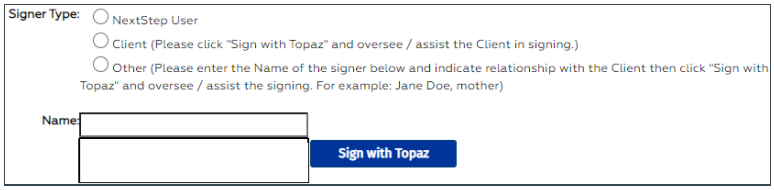
Field Type	Description
Chart Fill Table	Used to auto-populate a Chart Fixed Row field type from one Form to another. If a user modifies the Chart Fixed Row on the current Form they are accessing, it does not change the data on the Form it is referencing.
Chart Fixed Rows	Displays a set number of rows and columns. Columns can only have the field type of Dropdown, Yes/No, Date, Double, Integer, Memo, or Text. For printing purposes, select the **Hide Empty Rows/Columns** checkbox. 
Chart Variable Rows	Displays a set number of columns. Columns can only have the field type of Dropdown, Yes/No, Date, Double double, Integer, Memo, or Text. Allows the user of the Form to add a row as needed. 
Client Groups	Displays a list of Groups where you can add or remove a client from Groups within the Form or Note the field was added to. See **Add Client Groups Field to a Form or Note** for more details. 
Contact Block	Displays a listing of fields to collect contact information. ***Example of fields that can be displayed:***  ***Field choices:*** 

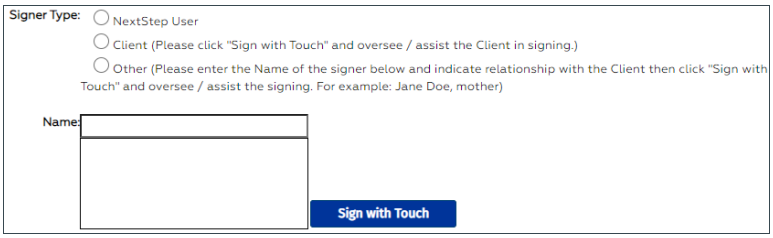
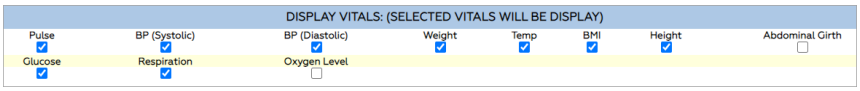
Field Type	Description
Count	Displays a count of the fields for the Group number indicated. It is important to make sure the Group number is the same for the fields you want to total. If the Form this field is added to is filled out more than once, select the **Key Indicator** checkbox to see changes over time graphed in the client's Document Center. See **Configure Field Groups for Average, Total, Min/Max, and Count Field Types**. 
Date	Displays a date field. 
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*. 
Document Upload	Displays a button used to upload or scan a document into a client's chart. See**Scan and Import into NextStep**. 
Double	Displays a field where you can 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** 
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 in**Admin 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. 
Eligibility Check	Legacy field. Replaced by Realtime Eligibility Field Type.

Field Type	Description
Field Reference ONLY	Displays a field reference from another Form or Note but**does 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
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... **Form Link field on completed Form** Form Link Field 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. If you are going to use the image as a client image, for example, to display on the header, it is recommended that you set the **Image size** to **Resize to custom height (maintaining proportion)** and set the value to about **200** for a good display. **Image Upload:** Upload/Change Image

Field Type	Description
Insurance (Billing)	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 or VPO). Information updated here flows over to the Billing Engine. See **Add Client Insurance Information** for more details. 
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** 
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.
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: 
Medication Listing	Displays a list of medications for a client. 
Memo	Displays a memo/note box. 
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:** 

Field Type	Description
Multi Image Upload	Displays an Upload/Edit Images button used to upload multiple 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. 
Payment History	Displays a Payment History table and pulls information from the Payment Center (Swerve Pay). **Payment History Field** Transaction # | Transaction Ref ID | Date | Amount | Type | Processed By 3 | | 8/31/2021 | $-50 | Refund | NextStep Solutions 2 | | 6/8/2021 | $50 | Sale | Megan Matlack 1 | | 6/2/2021 | $100 | Sale | Megan Matlack
PCP Goals	Displays the Individualized Treatment Plan (ITP) Goals. When you click **show details,** information that was documented in the Treatment Plan is displayed and you can add notes to the text field. 
Program Link	Displays a drop-down for users to associate a given Form to a client's Program. The listing of Programs is based on the selected Date of Service. ***Program Link field drop-down on draft Form*** **Program Link** Outpatient MH ***Program Link field on completed Form*** Program Link Outpatient MH
Realtime Eligibility	Displays the status of a client's insurance coverage. Requires your Agency to be using Trizetto as your Clearinghouse. 

Field Type	Description
Search Notes	Displays a Search Notes widget that allows users to search Notes for a client based on search criteria. 
Select All That Apply	Displays multiple answers and the ability to select all answers that may apply to a question. 
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** 
Signature	Displays the selection of the signer from the Signer Type drop-down and a combination of the Use Topaz Signature or Use Touch Signature buttons. 
Stethoscope Audio	Legacy field.
Text	Displays a text field. 
Topaz Signature	Displays radio buttons to select Signer Type and a Use Topaz Signature button. 

Field Type	Description
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** 
Touch Signature	Displays radio buttons to select Signer Type and a Use Touch Signature button. 
User Dropdown	Displays a drop-down menu that contains a list of staff members who have a NextStep login.
Vitals	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***:  ***Vitals fields***: 

Showing 1 to 50 of 52 entries