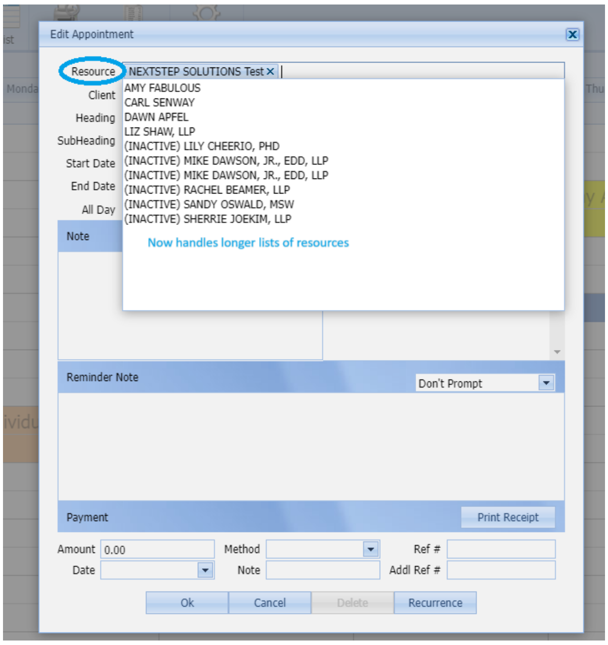
NextStep Clinical 11.9 Release Notes

Last Modified on 09/20/2024 5:13 pm EDT

11.9.14 Release Notes

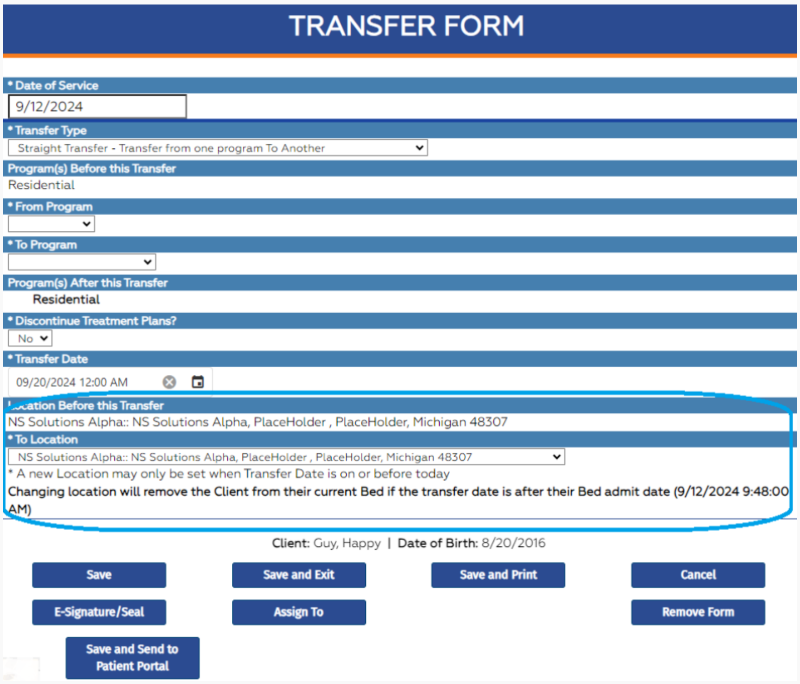
Estimated Release Date (all agencies): **9/22/2024**

Issues Resolved:

Release 11.9.14	
Account Settings	Critical bug fixes
Scheduler not showing all Resources when adding or editing appointments	*Home Screen > Navigation Panel > Scheduler > New/Edit an appointment* The **Resources** field available when scheduling or editing an appointment in the**Scheduler** was expanded to allow more resources to be selected. This issue was blocking larger agencies from some scheduling activities This issue has been fixed. 

Improvement:

Release 11.9.14	

Release 11.9.14	
Add Location to the Transfer Form	*Main Menu > Admissions > Transfer Forms-Discharge Forms > Transfer Form* You can now change the client's Location on the transfer form. Should the client be in a bed in their current location, and moved to a different location, you will be warned, upon sealing, that completing the seal will remove the user from that bed. 

11.9.13 Release Notes

Actual Release Date (**agencies using Insig for Telehealth**): **9/8/2024**

Estimated Release Date (all agencies): deployed with 11.9.14 on 9/22/24

Issues Resolved:

Release 11.9.13	

<table>
<tr><th>Release 11.9.13</th><th></th></tr>
<tr><td>Scheduler updated to address Telehealth issues</td><td>

*** Important: Any end user who has an Insig login for hosting telehealth sessions will need to go to the Insig Dashboard from the Main Menu and re-enter their credentials after the update is complete. See screenshots below.

A customer reported an issue with the scheduler hanging when they dragged a telehealth appointment to schedule it. Updates were needed to address modifications in the Telehealth interfaces. While working on that, additional items were resolved. This update includes:

- Fixing the issue when telehealth appointments are dragged onto a calendar slot and the cursor spins
- Handling seasonal issues related to Daylight Saving Time
- Correcting an issue where modifying one group member's telehealth appointment could impact the telehealth appointments of other group members.

After the update - for end users who host telehealth appointments:

- Go to ***Main Menu > Treatment Planning > Insig Telehealth Dashboard***
- When prompted, enter your Insig credentials
- If your agency has customized the wording or layout of your Main Menu, your screens may not match the screenshots below. Please contact your agency's NextStep Administrator for specific steps for your environment.
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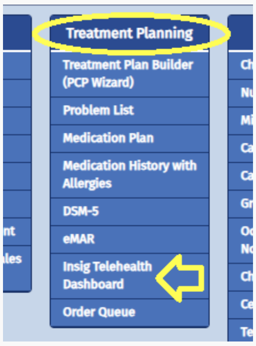

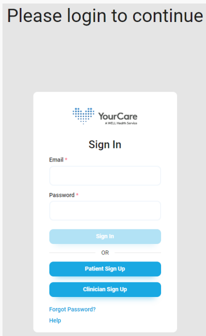

</td></tr>
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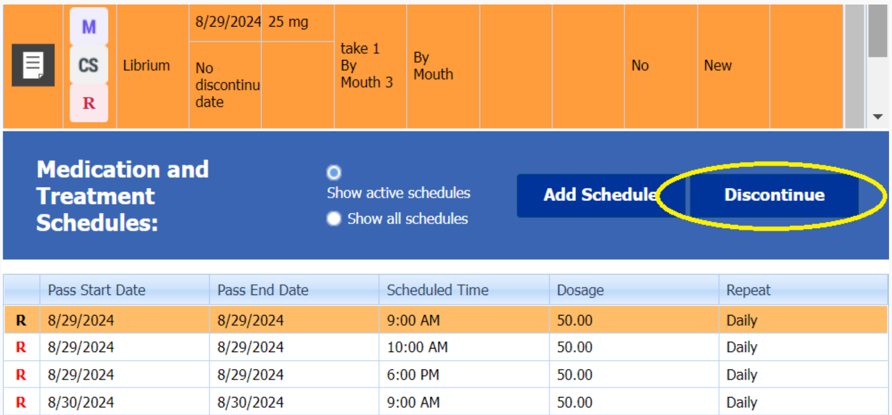
11.9.12 Release Notes

Estimated Release Date (all agencies): **9/1/2024**

Issues Resolved:

Release 11.9.12	

<table>
<tr><th>Release 11.9.12</th><th></th></tr>
<tr><td>Census Billing cannot seal and no error given</td><td>Main Menu > Progress Notes > Census Billing
When a draft Census Billing date is opened, it is possible that you cannot seal it because a change to the client's Admission Date or Discharge Date causes the client to no longer be active during the Census Date. In this case, the client record would not appear on screen, but it would prevent the Census from being sealed.
This issue has been fixed.
When this state occurs, the problematic line(s) will be displayed in red, and the user will have the option to Delete the line(s). The Census will still not seal if those lines are not deleted and an error message will display at the bottom indicating why it cannot be sealed.</td></tr>
<tr><td>eMAR showed late passes for discontinued medications</td><td>Main Menu > Treatment Planning >eMAR
A customer reported that in certain instances, eMAR was displaying Late Passes for some medications after the discontinuation date on their orders..
This issue has been resolved.</td></tr>
<tr><td>eMAR button to discontinue a medication schedule not appearing in all cases</td><td>Main Menu > Treatment Planning >eMAR > Medication and Treatment Schedules
In certain circumstances the Discontinue button was not available in theMedication & Treatment Schedules section of eMAR after the user selected a medication. This prevented users from discontinuing or modifying days within a schedule in eMAR.
This issue has been resolved.

</td></tr>
</table>

11.9.11 Release Notes

Estimated Release Date (all agencies): **8/25/2024**

Issues Resolved:

Release 11.9.11	
EOD tag on eMAR Discontinue Date was removed	Fixed an issue in eMAR where Discontinued/End date include "EOD". Since the End date is the date the medication is no longer given, not the last date the medication was given, this "EOD" was incorrect and has been removed.

Release 11.9.11	
eMAR screen synchronization issue	Fixed an issue where late passes appeared in the PRN pass section of eMAR. They were never intended to appear there, and sometimes those late passes were not associated with the selected client. This change removes the late passes from the PRN section of eMAR.

11.9.10 Release Notes

Estimated Release Date (all agencies): **8/11/2024**

Feature Enhancement:

Release 11.9.10	
New Setup Option to Make Client Insurance Subscriber Fields Required *dependent upon Billing 7.8.1 Release	*NextStep Billing > Maintenance and Setup > Configuration Options > System tab > CTB tab > Page4 tab* There is now an option to **Require Client Insurance Subscriber Number, Name, Address, and DOB for non-Private Pay Party Types**'. This will affect the Client Insurance in both Clinical and NextStep Billing. When this box is checked, the following listed fields in**Client Insurance** will be required before being able to **Save** the Client Insurance. • **Subscriber Number** • **Subscriber First Name** • **Subscriber Last Name** • **DOB** • **Address** • **City** • **State** • **Zip** By default, this setup option will not be checked.

Issues Resolved:

Release 11.9.10	
Consistent Terminology: Update DSM-V to DSM-5	*Various locations* All references to “DSM-V” have been changed to “DSM-5” where they could be changed programmatically. Note that some NextStep sites utilize a Dictionary Term for certain labels that may still be set to “DSM-V”. Contact NextStep support if you notice a discrepancy and would like support to update the Dictionary Term.
Error when using Quick Navigation after editing Client Information	There was an error such that if you edited a client (e.g. changed the**Primary Provider**) from the **Quick Navigation** bar and saved your changes, then looked up the same client on the Quick Nav bar, and clicked **Edit**, you would get the error *"Either BOF or EOF is True, or the current record has been deleted. Requested operation requires a current record."* This issue has been fixed.

Release 11.9.10	
Navigation error attempting to visit a Reminder after Updating Face Sheet data	In the past, if a person attempted to open a specific reminder after performing an update on a client's **Face Sheet**, the system would present a blank white box on the**Reminders** page and appear to stop working. This issue has been fixed.
Census Billing - Inconsistent auto-populate in Diagnosis	*Main Menu > Progress Notes > Census Billing* Previously in **Census Billing** there was inconsistent behavior where for some clients the**Diagnosis** was auto-populating and for others, it was not. This would happen even if a client had a single diagnosis. This issue has been fixed.
Census Billing Diagnosis Text Saving to Billing Value	*Main Menu > Progress Notes > Census Billing* Previously, if you manually selected a diagnosis for a client from the dropdown in**Census Billing** in **NextStep Clinical**, that diagnosis was not sent to**NextStep Billing** accurately. This issue has been fixed.
Change to "Status" column on the Line Item AR by Date Type report	*Main Menu > Practice Management > Billing Reports > Line Item AR by Date Type* Previously, the **Status** column in the report displayed either NOT SENT or SENT. Now, the Status column has been repurposed as the **Print Status** column to match the **Status** seen in the **Line Items** in **NextStep Billing**.

11.9.8 Release Notes

Estimated Release Date (all agencies): **7/21/2024**

New Features:

Release 11.9.8	
Line Item AR dashboard updates	*Main Menu > Practice Management > Billing Reports > Line Item AR by Date Type* Fields added to the report: • **Activity Code** and **Description** • **Programs** • **Units** As well as new filtering options: • By **Client** • By **Program** Fixed: • **Balance** and **Age** columns ◦ Previously, when a client had two of the same services on the same day, the Line Items combined instead of staying as two lines. This has been corrected.
MAR Report for Discontinued Medications	Previously when the **MAR report** was displayed/printed, if a medication was to be discontinued during the time period shown on the report, the letters "D/C" showed in the box for the last day the medication would be taken. Now the box is blank for the last day leaving space for the staff member to initial when using printed copies of the form.

Release 11.9.8	
eMAR Medication Scheduling	When entering a schedule for a medication in **eMAR** the dosage strength now appears next to the medication name.

11.9.3 Release Notes

Estimated Release Date (all agencies): **7/7/2024**

Issues Resolved:

Release 11.9.3	
Scheduler: Start Time vs End Time	In the past it was possible for a user to save appointments in the **Scheduler** where the **End Date** and/or time were actually before the **Start Date** and/or time. This could lead to unexpected behavior. This issue has been fixed. If the user attempts to save an appointment that would start later than it ends, a pop-up is displayed informing the user of the error and allowing them to correct it and then save the appointment.

11.9.2 Beta Release Notes

Released (beta agencies): **6/30/2024**

New Features:

Release 11.9.2	
Client Signature may be set as required on Treatment Plan	Your state or agency may require that Treatment Plans be signed by the client before being finalized. You now have the option to set this requirement. To require the client signature on the Treatment Plan before Finalizing: • Go to the **Treatment Plan Setup (PCP Setup)** in **System Setup Supplemental** and • Set the new **Require Client Signature on Treatment Plans** on. Then the **E-Signature** button on the Treatment Plan will be grayed out until the Client Signature is obtained.
IBHRS Date Range for Treatments and Services. (beta)	When Reloading the **Treatment Plan Episode Data** or the **Service Event Data**, the user can now set a date such that only data after that date is loaded. Note that the data still takes the same amount of time to load. If you currently run this process after hours, you should continue to do so. We are interested in your feedback on this new feature to help limit the amount of data displayed.

11.9.1 Beta Release Notes

Estimated Release Date (beta agencies): **6/23/2024**

New Features:

Release 11.9.1	

Supervisor Signature: Designate which forms or notes are required	Admins can now designate which forms or notes specifically require a supervisor's signature in System Setup (Supplemental).
	1. Overview of the "**Supervisor Signature Required**" workflow:
	  1. System Setup (Supplemental) → Supervisor Setup → select your desired forms and/or notes
	  2. Maintain Users → select a user → enter a user in the Supervisor dropdown → check box for Supervisor Signature Required
	  3. Your staff finalizes a *designated* form or note
	  4. If billable, billing data does NOT send (yet)
	  5. Supervisor (as per Maintain Users) gets a reminder on their Reminders List
	  6. Supervisor clicks the form or note name, it opens, and they sign
	  7. Billing is sent to billing, and the reminder is removed.

Issues Resolved:

Release 11.9.1	
Chart Fixed Row field not updating	After admins added rows to a Chart Fixed Row field in Form Setup, end users were experiencing infinite spinning. The issue is fixed and users can add rows as desired.