

# NextStep Billing

## 7.8.1 Release Notes

Last Modified on 08/29/2024 4:10 pm EDT

Estimated Release Date: **Monday, 08/26/2024**

### Feature Enhancements:

Release 7.8.1	
<b>Priorities added to the Activity Code Service Bundle List</b>	<p><i>Maintenance and Setup &gt; Activity Codes &gt; Activity Code Bundle Setup</i></p> <p><b>Base Activity Codes</b> and <b>Code Groups</b> will require a <b>Priority Order</b> when adding or editing the Activity Code Service Bundle List. The Priority Order will determine the order in which the rules are run through in the <a href="#">Services Preprocessor</a> to select the final <b>Bundled Activity Code</b>.</p>
<b>New Setup Option to Make Client Insurance Subscriber Fields Required</b>	<p><i>NextStep Billing &gt; Maintenance and Setup &gt; Configuration Options &gt; System tab &gt; CTB tab &gt; Page4 tab</i></p> <p>There is now an option to <b>Require Client Insurance Subscriber Number, Name, Address, and DOB for non-Private Pay Party Types</b>. This will affect the Client Insurance in both Clinical and NextStep Billing.</p> <p>When this box is checked, the following listed fields in <b>Client Insurance</b> will be required before being able to <b>Save</b> the Client Insurance.</p> <ul style="list-style-type: none"><li>• <b>Subscriber Number</b></li><li>• <b>Subscriber First Name</b></li><li>• <b>Subscriber Last Name</b></li><li>• <b>DOB</b></li><li>• <b>Address</b></li><li>• <b>City</b></li><li>• <b>State</b></li><li>• <b>Zip</b></li></ul> <p>By default, this setup option will not be checked.</p>



**Details grid added to the Services Preprocessor**

File > Services > Services > Services - Preprocessor Form

The Services Preprocessor has been redesigned to simplify the user workflow. Previously, the form was made up of a grid and filter option dropdowns. In the redesign, the form still includes the top grid labeled as **Records To Be Bundled** but we've also included a second grid that will populate the **Base Records** that are the source of the final **Bundle Code**. When clicking on a line from the top grid, the bottom grid will populate with the corresponding Line Items. The **Preview** and **Generate** functionality of the Services Preprocessor remains the same.

The only required filter remains the **Beginning** and **Ending** date range. Other filter options are still available by clicking the **Filters** button.

The screenshot shows the 'Services Preprocessor' application window. At the top, there are input fields for 'Beginning' (07/01/2024) and 'Ending' (07/31/2024), a 'Filters' button, and 'Preview' and 'Generate' buttons. Below these is the 'Records To Be Bundled' section with a table:

Base Code or Group	Base Description	Bundle Code	Bundle Description
9300	PH Group Counseling	9300B	(bundled) PH Group Counseling
9303	AOD IOP Unlicensed	9303B	(bundled) AOD IOP Unlicensed
▶ Only one per day 9300 9302	9300, 9302	9210B	(bundled) AOD Group Psychotherapy

Below this is the 'Base Records' section with a table:

Client Name	Start Date	End Date	Base Code	Base Description	Units
▶ Molly Test	07/24/2024 09:00:00 AM	07/24/2024 10:00:00 PM	9302	AOD Sub-Acute Detox OutPt	1.00
Molly Test	07/24/2024 09:00:00 AM	07/24/2024 10:00:00 PM	9300	PH Group Counseling	1.00

**Resolved Issues:**



Release 7.8.1	
<b>835 Form - Un-Roll Transactions checkbox</b>	<i>Navigation Form &gt; 835 Form</i>  Previously when the <b>Un-Roll Transactions box</b> was checked and a payment that needed to be unrolled came back with different modifiers than what appeared on the Line Item, the lines would fall to the <b>Records Unable to Post</b> section. Now, when using that checkbox, the modifier will not be matched back to the Line Item and instead the other billing fields will be used to match back to a Line Item.

