

NextStep EHI Help Documentation

Last Modified on 10/02/2024 9:24 am EDT

About

NextStep's EHI feature lets you export all Electronic Health Information (EHI), captured in NextStep, for a single client or for all clients.

Enabling EHI

1. To enable the Export EHI feature for a user, you need to be an administrator.
2. Navigate to **MAINTAIN USERS** and select the user you wish to add the EHI feature.
3. Scroll down to the **Reports** section of the **Main Menu Privileges** and turn the **EHI** checkbox on.

Reports:

<input checked="" type="checkbox"/>	Administrative Reports
<input type="checkbox"/>	Personal Productivity
<input type="checkbox"/>	Report Designer
<input type="checkbox"/>	IBHRS
<input type="checkbox"/>	DAANES Test
<input checked="" type="checkbox"/>	EHI

4. Then click the **Update User** button at the bottom of **MAINTAIN USERS** to save your changes.
5. When that user views the NextStep **MAIN MENU**, they will now have an **EHI** button in the **Reports** menu.



Running EHI

1. To export data for a client or all clients, navigate to **MAIN MENU > Reports > EHI**
2. Select the **EXTRACT REPORT** button to open the EHI Dashboard.



Psychotherapy notes or info used for a legal action

You can identify forms and notes that gather psychotherapy notes or info used for a legal action in the Form Setup and Note Setup. The information should not be included in the EHI. To identify these Forms and Notes:

- Open Forms in Form Setup and turn on Skipped for EHI Export.
- Open Notes in Notes Setup and turn on Skipped for EHI Export.



NOTE SETUP

SELECT NOTE TYPE: Misc Note

NOTE CONFIGURATION

Note Properties

- Allow Client to View
- Client Must Sign
- Supervisor Signature Required
- Skipped for EHI Export

Update Cancel

Forms and Notes tagged in this way will be skipped when extracting data for EHI.

EHI Dashboard

1. When you click **EXTRACT REPORTS**, the EHI Dashboard is displayed.

Extract Reports

EXPORTS Date Range: 2024-09-26 to 2024-01-

Show 10 entries

Client	UserID	UserName	ExportedDate	Action
			2024-09-26 13:55:02.757	
3575	321	DAANES Reporting	2024-09-26 11:22:08.167	
4576	321	DAANES Reporting	2024-09-26 11:28:42.66	
923	321	DAANES Reporting	2024-09-26 13:54:49.817	
923	321	DAANES Reporting	2024-09-26 13:17:02.827	
924	321	DAANES Reporting	2024-09-26 13:43:03.903	
All	321	DAANES Reporting	2024-09-26 11:00:29.813	

Showing 1 to 7 of 7 entries Previous 1 Next

Creating an Extract

1. To create a new export, click the plus sign button in the upper right-hand part of the dashboard. You are then able to select **All Clients** or a single client.
2. In the example below, the user is requesting an export for client #1123



NextStep

Select Client

All Client By Client

Client ID 1123

Close Extract Reports

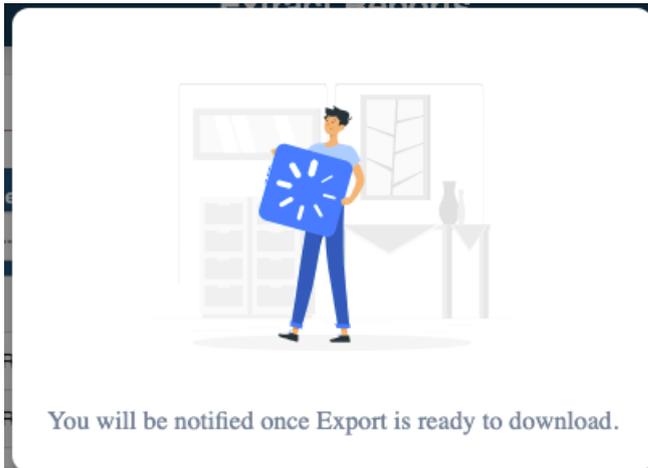
3. Once you have selected a client, click the **Extract Reports** button and the EHI file will be generated for the selected client (or All Client).
4. If the extract completes before you close the dashboard, you will be notified that the generated data is ready for download.

Generated report is ready to download... Please click the link in the table to download ✖

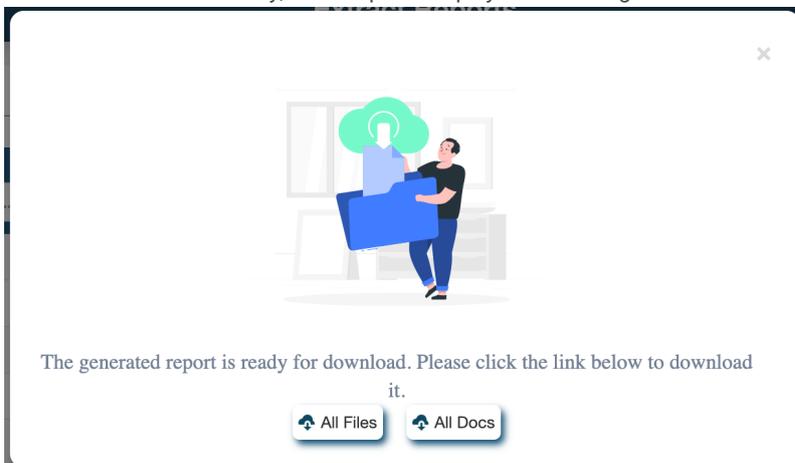
5. You will also receive an email when the EHI data export is complete. Keep in mind that if you are exporting data for All Client, the export could take a very long time.

Download Results

1. Once the data has been generated, you can download the EHI information.
2. Find the line item that represents the file you generated and click the download button.
3. Next, NextStep will then prepare the download and display the following:



4. Once the download is ready, NextStep will display the following:



5. You can click the following:



NEXT STEPS

- **All Files:** Download all csv files containing discrete EHI data. This will download a file with a name like Client1123Data.zip
- **All Docs:** Download all documents attached to the extracted client(s). This will download a file with a name like Client1123Document.zip

Document Filter

Most of the dashboard displays the extracts that have been created. You can filter these extracts in multiple ways.

1. DateRange Filter

- The Date Range field lets you filter on the date the data was exported.

Date Range: 2024-09-26 to 2024-01-

2. Column Filters

- Each column also lets you view and locate a file you created
 - **Client:** filters the client(s) associated with the file. Enter the Client ID, a partial ID, or 'All' for exports for all clients.
 - **User ID:** filters based on the user ID who created the file
 - **User Name:** filters based on the user name of the user who created the file
 - **Exported Date:** filters based on the date the export was created

For more information on EHI:

- Reference the [EHI Data Dictionary](#)

