NextStep Clinical 11.15 Release Notes

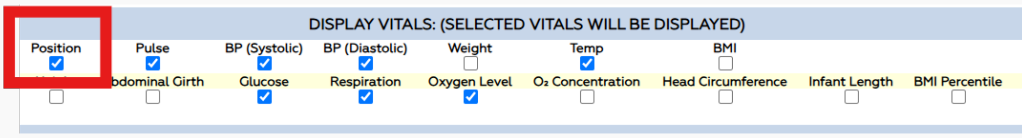
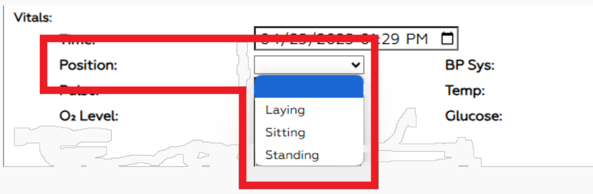
Last Modified on 05/05/2025 4:51 pm EDT

Note: Where paths or screenshots are provided with the descriptions, the naming conventions used are those from NextStep's standard configuration. If your agency has customized names and menu placements, what users see on their screens may differ.

11.15.4 Release Notes - Hot Fix

Expected GA Release Date: Sunday, **5/4/25**

Feature Enhancements

Release 11.15.4	
Time and Date can now be recorded when entering Vitals	Time and Date are now recorded when entering Vitals in Forms with the Vitals field, in Notes and in the eMAR. A default date/time is set and users can update the values. The time has been added to all Vitals History displays. Improvements have also been made to the order of the vitals fields, and the column names on the Vitals History.
The client's Position can now be recorded when entering Vitals	The client's Position when vitals are recorded can now be entered in Forms with the Vitals field, in Notes and in the eMAR. You can enable this feature in **Main Menu > Admin Tools > System Setup > Notes** scrolling down to the section for **Display Vitals: (Selected Vitals Will Be Displayed)** and checking the box for **Position**.  When entering the Position for the Vitals, the user will be given a Dropdown box with 3 options: Laying, Sitting or Standing. 

Issues Resolved

Release 11.15.4	

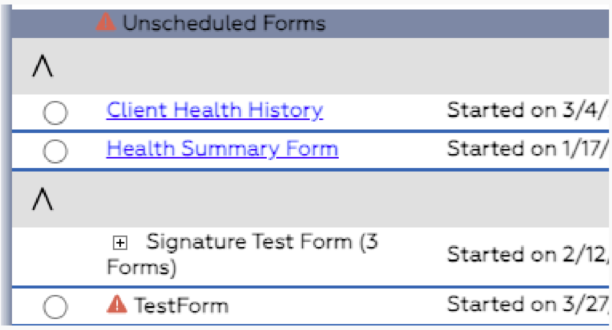
Adding single day passing schedules from the Orders Widget	*NextStep Home Page; Select a Client; Click Orders* There was an issue when users added a single day schedule in the **Orders Widget** and entered it with **From Day = To Day;** previously**,** NextStep did not generate passes for that schedule. This has been resolved. When adding passing schedules from the **Orders Widget,** if you want to create a single day schedule, you now need to set **From Day = To Day**. NextStep will correctly default the end of the schedule to 23:59 on the **To Day.** **Important Note**: this only applies to agencies who use the **Orders Widget** to manage medications and treatment schedules. This update has not yet been applied for schedules added from the Medication Plan or from within eMAR directly. Continue to enter schedules as you have been in those modules until a change is announced with a future release.
eMAR - recording medication and treatment passes	This release fixes several issues that were occurring with the eMAR around the concept of administering passes. **Known Issue**: If a user does not have the **Pass Correction** permission enabled, they will not be able to edit the **Pass Administered On** time when completing a pass. If the default time that NextStep prepopulates when the pass is selected is not correct for a particular pass, the user should deselect that pass, and ask a supervisor or a colleague who does have **Pass Correction** enabled to record that pass on their behalf, adjusting the **Pass Administered On** time as needed before clicking **Pass Selected**. All eMAR users should be able to correctly complete passes where the default Pass Administered On time is accurate regardless of their status with respect to the Pass Correction permission.

11.15.3 Release Notes - Hot Fix

Expected GA Release Date: Sunday**, 04/13/25**

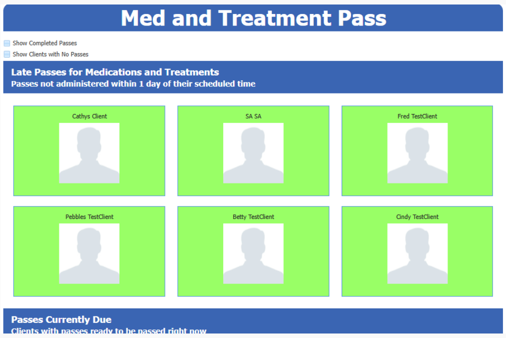
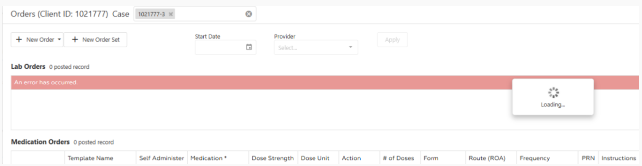
Feature Enhancements

Release 11.15.3	

The Document Center provides a visual cue for documents awaiting supervisor signatures	The Document Center now indicates when a file is awaiting Supervisor signature. If a section contains a file that is awaiting supervisor signature, a warning triangle will be attached to that section.  The warning triangle will also be attached to the individual file(s) that await supervisor signature. 
Patient Pay amount in Transactions posting as Psychiatric Reduction	In the Document Center When the user performs a Print Multiple Forms operation within the document center, after the user clicks Prepare for Printing, if the selection includes forms that are awaiting supervisor signature or revoked forms, the user will be warned before continuing with the print job.

Issues Resolved:

Release 11.15.3	
Census Billing will not send errored services to the Billing module	Progress Notes > Census Billing Previously, if Census Billing showed errors upon resealing, the service would still go to NextStep Billing. Now, when an error occurs in Census Billing upon resealing, it will not create a new service in NextStep Billing. Instead, it is recommended that those services be manually updated from the list in Billing Tasks. To learn more about Billing Tasks, check out this article,View Billing Tasks in NextStep Clinicalin the NextStep Solutions Help Center

eMAR showed a client in the Late Passes section when the client had no relevant Late Passes	Main Menu > Treatment Planning > eMAR > Building In the past, the system sometimes showed a card for a client in the Late Passes for Medication and Treatments section of the building level Med and Treatment Pass screen in eMAR even when the client's individual Med and Treatment Pass screen did not show any Late Passes for the same time period. This has been resolved. 
MAR (New) Report correctly builds initials for users w/out full legal names	Main Menu > Reports > eMAR Reports > MAR (New) In the past if a user did not have the Legal First Name and Legal Last Name filled in on their account, the MAR (New) report did not correctly build initials to display in the key and in the chart when the user was passing medications to a client. This has been resolved
Error Message in Lab Orders section of Orders Widget when Clinical Exchange is not enabled	Main Menu > Client Selection Panel > Orders Users at agencies where Clinical Exchange Lab Integration is not enabled received an error message with a persistent "Loading… " symbol in the Labs section when the Orders Widget was opened. (See image.) This has been resolved. 

11.15.2 Release Notes - Hot Fix

GA Release Date: **03/31/25**

Issues Resolved:

Release 11.15.2	
Medication Plan notes saving causes error	*Main Menu > Treatment Planning > Medication Plan* Users were experiencing errors when choosing **Update (Final)** after editing the **Subjective and Objective Data** and the **Assessment and Plan** blocks in the Medication Plan. This has been addressed.

11.15 Release Notes

Estimated Release Dates:

Beta: 3/23/25 11.15.0

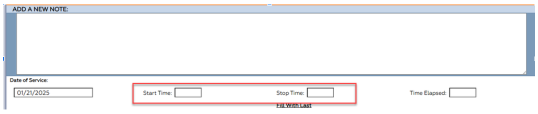
General: 3/30/25 11.15.1

Feature Enhancements:

<table>
<tr><th>Release 11.15</th><th></th></tr>
<tr><td>Reminders can be presented for ALL clients not just Active clients</td><td>Main Menu > Admin Tools > System Setup (Supplemental) > Reminders

In Admin Tools > System Setup (Supplemental), in the Reminders section, is a new toggle Include ALL clients in Draft Notes, Routed Notes and Started Forms sections. When you turn this on and click Update at the bottom of the Reminders setup section, the following sections in the Reminders page will display records for ALL clients
Draft Notes
Routed Notes
Started Forms
Prior to this change, those sections only displayed items for ACTIVE clients. This toggle is OFF by default.</td></tr>
<tr><td>Lab Results can be included in the badge count in a user's Reminders</td><td>NextStep Home Screen > Purple Menu Bar > Reminders

If the user has access to the Lab Results page, and the Lab Results Reminders are enabled in the Reminders section of System Setup (Supplemental), that user's badge count will reflect the number of rows in the Lab Results section of Reminders.</td></tr>
<tr><td>Require Diagnosis be entered for all new Clinical Exchange lab orders</td><td>Main Menu > Select a Client > Click Orders > New Order > Lab

Diagnosis is now required for all Clinical Exchange lab orders in the Orders Widget. Since Clinical Exchange requires Diagnosis regardless of the payer type responsible for the fees, this will help catch potential problems with new Clinical Exchange lab orders farther upstream in the process. Note: Clinical Exchange is one of the options available in the Type field of a lab order.</td></tr>
<tr><td>Notes Export Report now includes Note Start Time and Note Stop Time Columns which are available to all agencies</td><td>Main Menu > Administrative Reports > Notes Export
The Notes Export Report now displays two new columns Note Start Time and Note Stop Time. These fields are filled in from the Notes' "built-in" time fields shown below for those agencies that enable the "Include Start/Stop Time for Notes" feature.


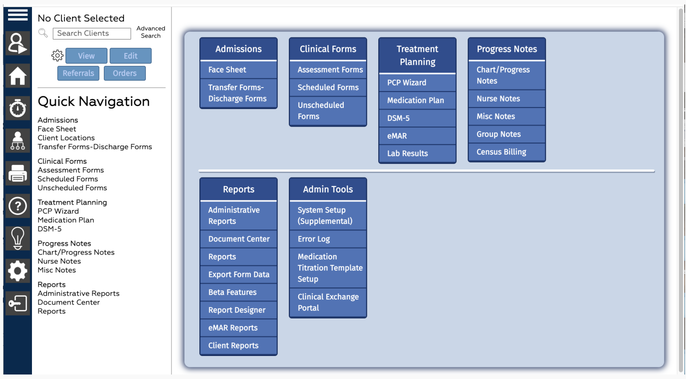
Customers using NextStep Billing may already be using Start and Stop times pulled in from Billing. Those have not been changed. The new fields appear at the far right of the report.

<table>
<tr><th>Start Time</th><th>Stop Time</th><th>Activity/Service Code</th><th>Service Location</th><th>Program</th><th>Rendering Provider</th><th>Diagnosis</th><th>Authorization</th><th>Units</th><th>Finalized By</th><th>Note Start Time</th><th>Note Stop Time</th></tr>
<tr><td>09:00 am</td><td>09:15 am</td><td>Alcohol and/or drug services; amb</td><td>Office</td><td>Crisis</td><td>Kate Pediatrician</td><td>(Primary) F10.10 - Alcohol use disorder, Mild</td><td></td><td></td><td>nextstep solutions, NSS</td><td>09:00am</td><td>9:15 am</td></tr>
</table></td></tr>
</table>

<table>
<tr><th>Release 11.15</th><th></th></tr>
<tr><td>Main NextStep Navigation Bars remember states between sessions</td><td>

NextStep Home Screen

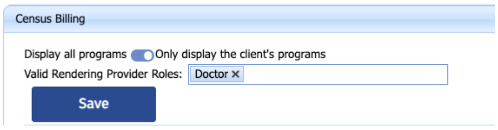
When you log in to NextStep, it will remember the state of the far left "hamburger" menu bar and the left quick navigation bar. For example, if you logout of NextStep with the hamburger menu bar collapsed, and the quick navigation bar expanded, when you log back in, you would see the following layout:



</td></tr>
<tr><td>Limit who appears as options for Rendering Provider in Census Billing by Role</td><td>

For Administrators :*Main Menu > Admin Tools > System Setup (Supplemental) > Census Billing*

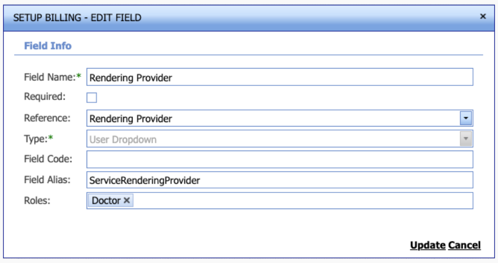
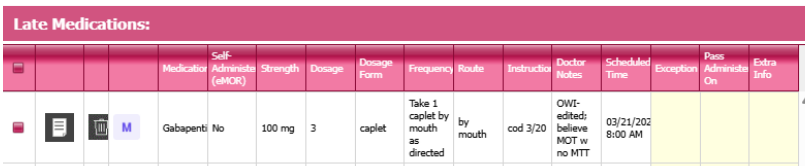
You can now limit the names in the**Rendering Provider** field in Census Billing. A new field, **Valid Rendering Provider Roles** has been added where you can specify the roles your agency wants to use to limit what names appear in **Rendering Provider** in Census Billing. If you enter roles, only users in one of those roles will appear. If you leave the field empty, all the agency's users will appear.

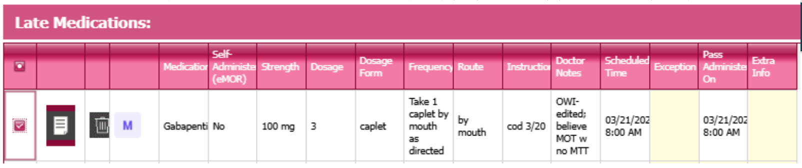


For Agency Staff: *Main Menu > Progress Notes > Census Billing*

If your agency is using this option, when you are working in Census Billing and select a**Rendering Provider** in the **APPLY TO ALL** section, or in the census billing grid, you will only be able to select a user with one of the **Valid Rendering Provider Roles**established by your agency's NextStep Administrators.

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

Release 11.15	
Limit who appears as options for *Rendering Provider* **in the** *Billing Box* **by Role on Notes and Forms**	For Administrators : *Main Menu > Admin Tools > System Setup (Supplemental) > Billing Configuration* You can now limit the names that appear in the **Rendering Provider** drop down in the Billing Box. **Admin Tools > System Setup (Supplemental) > Billing Configuration** now displays a **Roles** field in the **Rendering Provider** field. Note, if you create a new field with **Type** = *User Dropdown*, you can then open that field and limit the Roles.  For Agency Staff: *In Various Notes and Forms that request input for Billing* If your agency is using this option,, when you go to the Billing Box on a Note or a form, and select a **Rendering Provider**, you will only be able to select a user with one of the selected **Roles**.
Add Priority column to Billing Line Items reports in NextStep Clinical	*Main Menu > Practice Management > Billing Reports > Billing Line Items* *Main Menu > Practice Management > Billing Reports > Line Item AR by Date Type (Detail tab)* The Insurance Priority from the Client Insurance has been added as a new column in the above-mentioned reports.
Improved navigation on eMAR Med and Treatment Pass screens	*Main Menu > Treatment Planning > eMAR > Choose a Building > Choose a timeframe > Click on a Client Card > view Client's Med and Treatment Pass screen* In the past, the grids on a client's Med and Treatment Pass Screen showed a limited number of rows and the user had to page through a set of screens to view all the data in the particular grid. The grids now allow for scrolling through the data in each grid making it easier to work with the line items in them.
Improved handling of Pass Administered On times and Exceptions in eMAR	*Main Menu > Treatment Planning > eMAR > Choose a Building > Choose a timeframe > Click on a Client card > view Client's Med and Treatment Pass screen* When a user first opens a client's **Med and Treatment Pass** screen, the **Exception** and **Pass Administered On** fields come up blank rather than prepopulated for items that have not yet been passed.  When a user clicks the checkbox to select an item to be passed, the system now displays the date and time that it will assume as the default unless the user edits it before passing. Clicking the checkbox again, will clear any values entered in the 3 editable fields (highlighted in yellow).

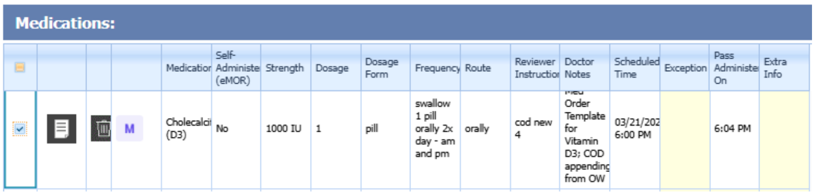


Late Medications:

				Medication	Self-Administe (eMOR)	Strength	Dosage	Dosage Form	Frequency	Route	Instructio	Doctor Notes	Scheduled Time	Exception	Pass Administe On	Extra Info
			M	Gabapenti	No	100 mg	3	caplet	Take 1 caplet by mouth as directed	by mouth	cod 3/20	OWI-edited; believe MOT w no MTT	03/21/202 8:00 AM		03/21/202 8:00 AM	

If the user does not explicitly enter an**Exception** when passing this medication, the system will store None for that field. If the user includes notes in **Extra Info**, these will be saved.

Note that for Late Passes, the assumed default is that the**Pass Administered On** (PAO) time was the **Scheduled Time**. If this is not accurate, the user can click into the field and edit it before passing. If the schedule pass was not administered at all, then the user can choose one of the Agency's defined Exception reasons and include that and set the PAO time to the current time, reflecting when the explanation was entered. It is advised that users include notes in Extra Info for any items that might appear to be discrepancies.



Medications:

				Medication	Self-Administe (eMOR)	Strength	Dosage	Dosage Form	Frequency	Route	Reviewer Instructio	Doctor Notes	Scheduled Time	Exception	Pass Administe On	Extra Info
			M	Cholecalci (D3)	No	1000 IU	1	pill	swallow 1 pill orally 2x day - am and pm	orally	cod new 4	Order Template for Vitamin D3; COD appending from OW	03/21/202 6:00 PM		6:04 PM	

For the case of OnTime Passes, the assumed default is the current time as defined by when the user checked the box to select the line item for passing. This entry can also be edited if that default is not correct.

If the client has a large number of items in a particular grid, they can click the "Select All" button at the top left corner of the grid to select (and prepopulate the defaults in) all the rows in the grid.

Clicking that checkbox once, selects all rows; clicking it again deselects all rows and clears the 3 editable fields in each row (Exception, Pass Administered On, and Extra Info). User should be cautious regarding a second click if they have made edits in several rows and those changes will be erased. It may be better in that case to deselect rows as needed via the checkbox in each individual row.

Agencies can choose how far back to show Late Passes in eMAR

Content Updated for 11.15.1 - feature added

A new setup variable is available to control how far back eMAR should look to determine what Late Passes should be included on the **Med and Treatment Pass** screens.

Note: This feature is set by a NextStep team member in consultation with Agency staff

Release 11.15	

Information displayed on eMAR screens will sync around the new timeframe

Content Updated for 11.15.1 - feature added

Main Menu > Treatment Planning > eMAR

The items below are now all based on the same time frame. That timeframe (how far back to look) can be configured per Agency as a Setup Variable. Now, that period will be used to determine:

- on the **Med and Treatment Pass** (by Building) screen, which Client's green cards appear in the **Today's Late Passes for Medications and Treatments** section, and
- on the selected client's **Med and Treatment Pass** screen, under the Late Passes section:
  - the rows that appear under the pink Late Treatments grid
  - the rows that appear under the pink Late Medications grid

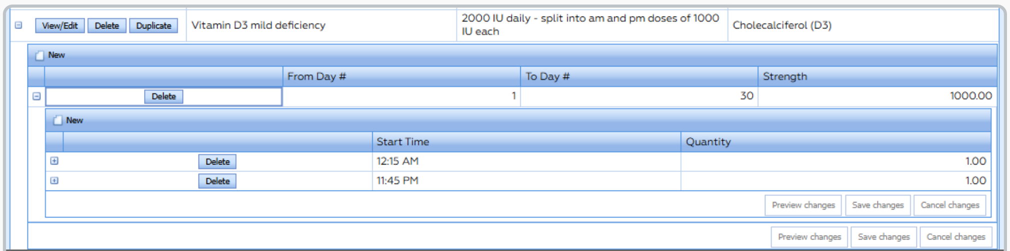
Improvements to setting up Templates and Schedules for Medications

Improvements have been made so that NextStep ensures that medication templates and schedules are setup completely when they are first created. This avoids challenges downstream that can occur due to incomplete items. Users may no longer:

- Assign an incomplete **Medication Titration Template** to a **Medication Order Template.**
- Assign an incomplete schedule (has days, but no times) to a **Medication Order Template** in Order Setup
- Send a medication order from the **Orders Widget** with an incomplete schedule to the **eMAR**

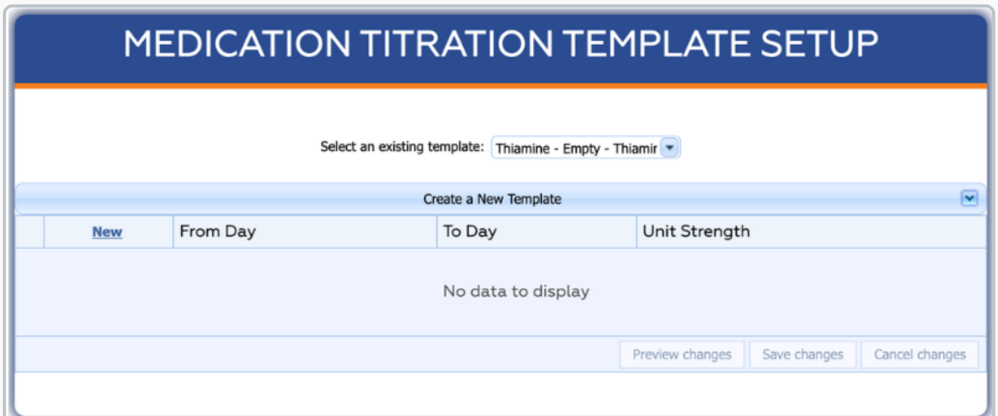
The images below illustrate where the improvements can be observed. **Note**: These areas require administrative permissions to access. Contact your NextStep Agency Administrator if you need access to these functions.

Main Menu > Admin Tools > System Setup (Supplemental) > Order Setup > Order Templates > Medication Order Templates

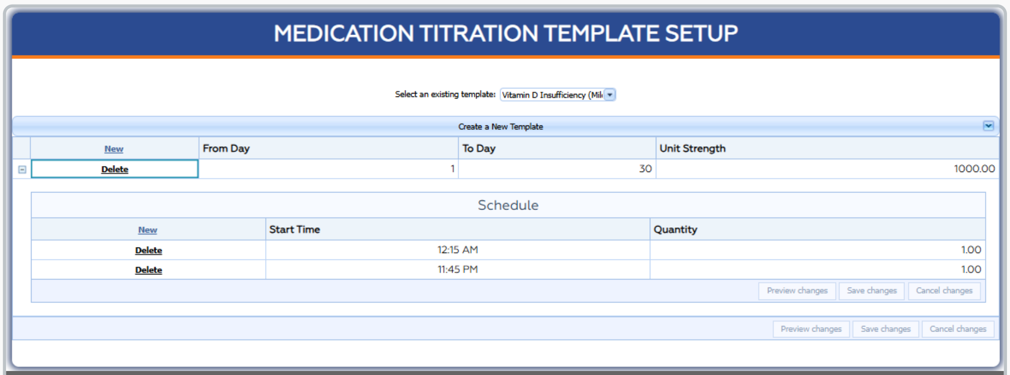


Sample Medication Order Template - with a complete schedule framework

Main Menu > Admin Tools > Medication Titration Template

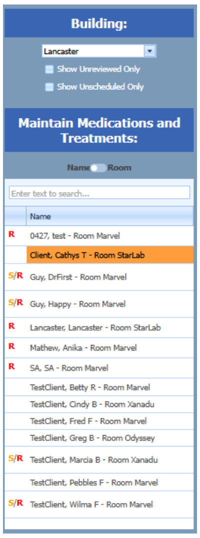


Medication Titration Template with "Empty" Schedule - No From Day / To Day intervals specified

Release 11.15	
	 Sample Medication Titration Template - with a complete schedule framework **Note**: These are examples only and should **NOT** be assumed to be medically accurate

Issues Resolved:

Release 11.15.0	
Accuracy improved in Badge Count in Reminders	*NextStep Home Screen > Purple Menu Bar > Reminders* The Badge count on **Reminders** on the Main Menu Bar is supposed to show the number of case assignments for the user that have not been acknowledged. There was an issue where this count was including discharged clients. This issue has been addressed.
Deposit Sheet report does not match between billing app and clinical site	*Clinical > Practice Management > Billing Reports > Deposit Sheet* This report now has a **Group Panel** feature for the user to group information by the selected column(s). It also now includes a **Source** column (OTHER, CREDIT CARD, CHECK, and CASH) to match the Source categorization as seen in the NextStep Billing report of the same name. To use the Group Panel feature, click the new **Group Panel** button. Then drag a column header to the top to group by that column. Multiple columns can be dragged to the top for grouping. You can also drag the column back into the grid to not order by that column anymore.
Two Scroll Bars in eMAR	*Main Menu > Treatment Planning > eMAR > select a building > click on a client name* There was an issue with the **Medication and Treatment Info** section of the eMAR where it was showing two vertical scrollbars. This issue has been fixed so there is only one vertical scroll bar and the header remains visible as the user scrolls up and down.

Release 11.15.0	
eMAR selected Client clears in side panel when view is changed	*Main Menu > Treatment Planning > eMAR* In the past, when users navigated through different views in eMAR, some of them did not clear the selected client (as shown in orange below) when the views changed in the main panel. This could cause things to appear out of sync when users selected different clients from the **Med and Treatment Pass** screen and the header for those clients came up on the**Med and Treatment Pass** screen. A similar issue could occur if the user changed the sort order above the client selector list between **Name** and **Room**. These issues have been fixed. 
Overnight, client's cards appeared in the Today's Late Passes section even when the clients had no late passes.	*Main Menu > Treatment Planning > eMAR* A customer reported an issue where there was a period of time in their overnight shifts where a number of their admitted clients would appear to have late passes for today on the overall **Med and Treatment Pass** screen when the **Late Passes** grids on their individual **Med and Treatment Pass** screens did not show any late passes. The issue would resolve itself at the end of one of their pass windows. This has been addressed. **Note**: Some agencies may still observe cases where clients' cards appear to be miscategorized based on additional factors unrelated to the issue addressed here. If you continue to have issues with client cards appearing to be incorrectly sorted, please contact support so we can evaluate and provide steps that can be taken.
Special characters in user Display Names had issues auto-populating into signatures to sign-off on items	*Various documents requiring sign-off* In the past, users who have "special characters," like the apostrophe in O'Donnell, in their display names had issues when trying to sign some documents. The auto-populate feature was not working properly for them. This issue has been fixed in several areas and continues to be worked on. If you encounter a problem with this after receiving the 11.15 release, please contact support so that we may follow up.