

NextStep... Practice Management Software

11.18 Release Notes

Last Modified on 04/19/2026 2:20 pm EDT

Release Dates

Beta: 10/5/25 11.18.0

GA: 10/19/25 11.18.4

Hot Fix 10/28/25 11.18.5

Feature Enhancements:

Release	
11.18.0	
Conditional Fields on Forms	<p><i>Main Menu > Admin Tools > Form Builder</i></p> <p>Using the Form Builder, you can now add conditional rules to fields to control whether those fields are visible or required. This powerful new feature can save users time by displaying only what they need to see based on other answers. And you can create higher quality data by ensuring required fields, that have interfield dependencies, are completed.</p> <p>Click here to learn more.</p>
Client Portal Notifications	<p>When a user sends one of the following items to a client's portal, that client will receive an email notifying them that there has been recent activity on their portal account</p> <ul style="list-style-type: none"> • a form • a note • a treatment plan • a new message <p>Then that client will receive an email notifying them that there has been recent activity on their portal account. the end of the day, if one or more of those changes occurred for a client, a single email containing a link to their portal is sent. The user has to log in to their portal account to see what changed.</p> <p>Note Each NextStep client Face Sheet may have multiple portal users. All portal users to whom the client information was sent will receive an email. The email sent will have a subject of: Portal has been updated and the body of the email will be:</p> <p><i>There was new activity added to your portal sometime today. To view the activity, log into the portal with this link <link to your portal.</i></p> <p><i>Note: this is an automated email. Please do not reply to this email.</i></p> <p>Lastly when a client logs in to the Client Portal, they will now see red dots indicating that Messages and/or Documents have something that needs their attention. The red dots will contain a number indicating the count of the items that need their attention.</p>



APPOINTMENTS

DIAGNOSES AND MEDS

MESSAGES

2

DOCUMENTS

2

BILLING

ACTIVITY

RESET PASSWORD

The subsections, like Documents, also have red dots next to the specific items that need the user's attention

DOCUMENT CENTER

Start a new form:*

Continue document

Continue document (submitted)

Signature req

View completed document

View education resources

Document Name	Action	Date Of Service	Sent To Portal On	Started Ti
PHQ-9	View education resources	7/23/2025	07/23/2025 06:27 AM	07/23/20:
● Educational Form	View education resources		07/29/2025 09:08 AM	07/29/20:

Improved navigation for Required Fields on Forms

Navigation to find required fields on a form has been improved. When a user tries to save a form that has one or more required fields without a value, a set of red arrows will appear on the form to help the user navigate to the next or prior required field. If a required field is in a collapsed header, that header will automatically expand when you "arrow" to that field. The red dots will disappear after the client interacts with the section.

Cancel

Remove Form



Treatment Plan Custom Objective

Administrators may now create a Custom Objectives for treatment plans. A therapist can then create their own Objective for a Goal, in the PCP Wizard, to make their client's Treatment Plan individualized.

Missing Diagnosis Report changes

Reports > Reports > Diagnosis

The **Missing Diagnosis** report has been renamed **Diagnosis** and will now include the following expanded data:

- The following filters have been added to the report
 - Show all active clients
 - Show active clients with missing Primary Diagnosis
 - Show active clients with missing Primary or Secondary Diagnosis
- The following new columns have been added to this report
 - Location
 - Primary Diagnosis
 - Secondary Diagnoses
 - Rule Out Diagnosis



This update will be for agencies that use NextStep Dispensing.

If a user is viewing a **Medication Listing** on a form, and the client has a dose in their current episode of care (like the one that can be displayed in the header), then the information for the latest dose will be displayed as the last medication in the Medication Listing.

# Aspirin 325 mg 325	Not for psychiatric purposes	7/17/2024	
# DetoxVita	Meds for Testing	4/28/2025	MOT-Instr
* Methadone Diskettes 10.00mg	DISPENSING		Last dispensed on: 05/28/2025

= This medication is not saved with this form yet but will be if another update is done.
 * = This is the last dose record (will not be saved to this form)

[Go To Med Plan](#)

Issues Resolved:

Release 11.18.0	
Required Document and image upload issue	There was an issue with document and image uploads that were marked as required, which occurred for customers who had been transitioned to the new document storage system. This has been addressed.

Release 11.18.4	
Required Document and image upload issue	There was an issue where the Medication Plan "Prescribed By" field was copying the User Credentials field from Maintain Users to "Added By" field. This has been addressed.
Print Multiple issues	There was an issue in some instances that created an error with the Print Multiple feature in the Document Center. This issue has been addressed.
eMAR PRN section not always loading images	There was an issue with the PRN section of eMAR where images were not always loading properly. This issue has been addressed.
Red arrows for required fields	The new red arrows, that let the user navigate required fields, were not always working properly. This issue has been addressed.

Release 11.18.5	
Required Fields	There were a number of issues with required fields on forms and Treatment Plans that have been addressed.
Error in Chart/Progress Notes	There was a Variable Undefined error that could occur when saving a Chart/Progress Note. This issue has been addressed.
Signing forms with required fields	There was an issue with some forms where users could not sign a form, prior to it being sealed, without completing all required fields. This issue has been addressed.
Error on Forgot Password	There was an issue that could occur when a user clicks Forgot Password on the login page. This issue has been addressed.
Treatment Column on Orders Widget	There was an issue on the Orders Widget where users could not order the Treatment Column alphabetically. This issue has been addressed.
Billing Choice Options error	When editing Billing Options under System Setup Supplemental, a user would sometimes get an error, <i>Callback request failed due to an internal server error</i> , when editing the Secondary Value of an item. This issue has been addressed.

