11.20 Release Notes

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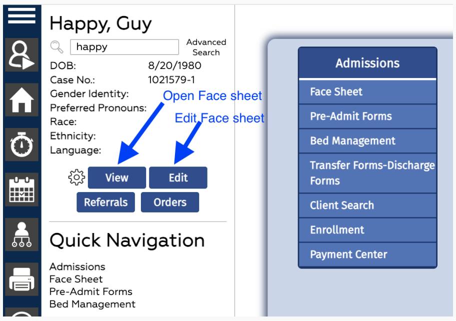
Release Dates

Lighthouse: 4/5/26 11.20.0

GA: 4/19/26 11.20.3

Feature Enhancements:

Release 11.20.0	
AI Scribe for Progress Notes	*Main Menu > Treatment Planning > Sessions* The new NextStep AI Scribe can join a **Session** with a client, and create a draft **Progress Note** containing a summary of the session and completed **Chart Notes** for each **Treatment Plan** objective. For details on use and administration, see NextStep AI for Progress Notes
Observation Journal	*Main Menu > Treatment Planning > Observation Journal* The new Observation Journal provides users in a residential type facility an easy way to document where clients were observed, at specific intervals during the course of the day, for safety reasons and to meet state and accreditation guidelines. This tool has been built so that it can easily be used in a browser running on a tablet.
Billing Health Dashboard	*Main Menu > Practice Management > Billing Reports > Billing Health* This clinical dashboard integrates billed amounts, collected amounts, and open balances into a single report. Consolidating this data improves efficiency for agencies during month-end reporting and provides a valuable resource for users who need to monitor an agency's billing health without having direct access to the billing module. The report can be filtered by Date of Service, Posted Date, or both. The dashboard features Summary and Details tabs and allows users to group data by any column including Location, Program, User and Payer.
Deleted Services report	*Main Menu > Practice Management > Billing Reports > Deleted Services* This new report lists Services that have been deleted from NextStep Billing for a selected date range. If a Service that was deleted needs to be restored and sent back to NextStep Billing, select the checkbox for the line you'd like to restore, then click the **Restore** button. To use the Restore capability, you must have a user permission, **Restore Deleted Services**, enabled. This list can also be exported.
Add "Select One Only" field type to Face Sheet	*Main Menu > Admin Tools > Form Setup* You are now able to add a “Select One Only” field type to the Face Sheet.
Set activities that appear on each billable form	*Main Menu > Admin Tools > Form Setup* Using the **Form Builder**, you can now identify which activities appear in the billing box for a form. This feature was already available for Notes. It helps to limit the activities that a user can select.
Add Demographics to Pre-Admit Forms to prefill Face Sheet	*Main Menu > Admin Tools > Form Setup* **Face Sheet** Standardized Demographics may now be added to **Pre-Admit** forms and used to initialize values in the Face Sheet.

Create an archive of the face sheet as a PDF when a client is discharged	*Main Menu > Reports > Document Center* When you seal a Discharge Form for a client, a PDF snapshot of their Face Sheet is created and placed in the Document Center under Face Sheet History (which used to be called Face Sheet Change Log). The snapshot is an archived version that will not change when future changes to the Face Sheet are saved. There are some limitations including not recording items that are not set to print, like Medication List, Insurance Widget and fields with Not print enabled in the field definition, and also the appearance of a "Loading" icon on the snapshot. **Note: There is no longer a Face Sheet button on the Document Center. To view the client's current Face Sheet, select Face Sheet from the Main Menu. You can also always open the current Face sheet by clicking the** View **button on the** **Client Details Panel** **(see below) at any time To view the Archived Face Sheet associated with an episode of care, open the case.**  **Note: Face Sheet snapshots are only created for clients discharged in v11.20 and later.**
Client Account Dashboard	*Main Menu > Reports > Client Reports > Client Account* The Client Account Dashboard displays all charges and payments, including unapplied private payments, for the selected client. This dashboard is useful for checking client balances when checking in a client for a scheduled appointment. **Note, this dashboard is only useful if your agency is using NextStep Billing.**
Dashboard - Missing 2 Consecutive Appointments	*Main Menu > Reports > Reports > Consecutive No-Show Appointments* This new dashboard lets you identify clients who have missed 2 or more consecutive appointments over a specified time frame.
Make the grid in Billing Services Dynamic respond to resizing	*Main Menu > Reports > Admin Reports > Billing Services Dynamic* Updated this report to better fit and scroll in the browser.
Draft Note warning	*Main Menu > Progress Notes* Your NextStep instance can be configured so that, if a user opens a**Custom Note** page or the Misc Note page for a client, and that client already had a **Draft Note**, the user would get a warning. This warning now works for all note types, except **Group Notes**. If you would like to be warned of an existing draft note, please contact support or your Customer Success Manager to have this enabled. **Known issue: after saving a draft of some note types, after the note has been saved, that same note section is reopened and will display the warning that a draft note, the one you just saved, exists.**

Issues Resolved:

Release 11.20.0	
Do Not Display Custom Face Sheet Roles Upon Discharge	*Main Menu > Admissions > Face Sheet* There was an issue where, after clients are discharged, all custom roles added to the Face Sheet remain filled out. This issue has been addressed.
Note overlap warning for custom Notes	*Main Menu > Admin Tools > Note Setup > Note Configuration* There was an issue where, when you set a custom note to have Time Overlapped checked, after clicking Update Configuration, the checkbox is no longer selected. This issue has been addressed.
Display of Field Reference Only for Standard Demographics	*Main Menu > Admin Tools > Form Setup* There was an issue where if you created a field reference to a Standard Demographic value, and that value had sub values, the field reference showed all the subvalues. This issue has been addressed
Medications marked "as needed for pain" in DrFirst	*Main Menu > Treatment Planning > Medication Plan* There was an issue where medications marked "as needed" in DrFirst were not populating as PRNs in NextStep. This issue has been addressed.
"Select One Only" Required field type billing message	*Main Menu > Treatment Planning > Notes* There was an issue where “Select One Only” fields on a note would sometimes create a pop-up about required Billing fields on that note. This issue has been addressed.
Discharge print paper size	There was an issue where printing a discharge was using a default paper size of A4 instead of standard sizes. This issue has been addressed