



NEXT Release Notes 2025.04.15

CLINICAL

Reporting Groups Management for Organizations

A new feature has been introduced to empower Org Admins with greater flexibility in managing community groupings for upcoming ElderSmarts reporting. This includes a full **Reporting Group Management** interface accessible from the Organization detail page.

Reporting Group Management Card

- A new "**Reporting Group Management**" card has been added to the Organization detail page.
- Clicking this card opens a dedicated management page with two tabs: **Groups** and **Communities**.
- This interface supports grouping communities for use in internal reporting and ElderSmarts data segmentation.

Groups Tab: Create and Manage Reporting Groups

- Org Admins can create, edit, and delete reporting groups directly from the **Groups** tab.
- Validation rules ensure that only groups without assigned communities can be deleted.
- Built-in alerts and error messages guide users when actions are restricted or incomplete.

Communities Tab: Region Assignments and Management

- Admins can assign communities to reporting groups using intuitive search and filter tools.
- The interface allows for viewing current region assignments and reassigning communities between groups as needed.
- Success messages and reassignment warnings ensure users are informed of all changes in real-time.



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← Organization

Reporting Group Management

COMMUNITIES GROUPS

Community ↑	Groups
Blue Bay Homes	North
Centennial Club	South
Green Window House	South
Red Door House	South
Silver Street	North
Yeti Homes	East

New Configurable Form: Plan of Care

A significant addition has been made under Config > Forms to support clinical documentation workflows and regulatory compliance. The Plan of Care form is now available for Clinical Managers to generate, edit, and configure resident-specific care plans.

Plan of Care Form Creation and Access

- A new Plan of Care form option has been added to the Clinical > Forms section.
- Clinical Managers can generate and print this form for residents, supporting regulatory documentation and internal processes.

Edit Mode Functionality

The form is fully configurable and designed for flexibility:

- Editable Fields: Includes Resident Information, Contact Information, and Plan of Care Text Block.
- Signature Page Toggle: Enables or disables the signature page from appearing in printed forms.
- Exclude Physician Signature Toggle: Controls whether the physician's signature appears on each page.
- Signature Selections: Options for required signatures include Resident/Representative, Community Representative, Nurse, and up to four custom signature lines (with mandatory title input).



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Plan of Care Save

Setup

Title
Plan of Care

Address
123 Sunset Ave
Willmar, MN89653
United States

Information Included

Resident Information

- Allergies
- Biography
- Custom Fields
- Diagnoses
- Diet
- Evacuation Status
- Medicaid Number
- Medical Record Number
- Personal Directives
- Start of Care date

Contact Information

- Dentist
- Dental Insurance
- Funeral Home
- Health Insurance
- Hospital
- Personal Contacts
- Pharmacy
- Primary Physician

Plan of Care Text

Plan of Care Text
By signing below, I am in agreement to the above Plan of Care.

63 / 20000 Remaining

Signatures Required

- Signature Page
- Physician Signature
- Resident or Representative
- Community Representative
- Nurse
- Signature
- Signature
- Signature
- Signature
- Signature

Key Features:

- Dynamic Field Population: Data is automatically pulled from the Resident Record and Community Settings, ensuring consistency and accuracy.
- Form Name Customization: Allows users to rename the form title as it appears on printed versions.
- Field Defaults: Most resident and contact fields are pre-selected by default to streamline setup.

View Only Mode

- The form detail page defaults to View Only mode for general access, ensuring visibility while preserving data integrity.
- Sections include: Setup, Information Included, Text Block, and Signatures Required.
- A "Back to Forms" button is available to easily return to the listing screen.



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← Forms

Plan of Care

Edit

Setup

Title
Plan of Care

Address
123 Sunset Ave
Willmar, MN89653
United States

Information Included

Resident Information
Allergies, biography, custom fields, diagnoses, diet, evacuation status, medicaid number, medical record number, personal directives, start of care date

Contact Information
Dentist, dental insurance, funeral home, health insurance, hospital, personal contacts, pharmacy, primary physician

Plan of Care Text

By signing below, I am in agreement to the above Plan of Care.

Signatures Required

Physician, resident or representative, community representative

Unsaved Changes Alert

- An unsaved changes alert appears when users attempt to leave the edit screen with unsaved modifications.
- Users are prompted to save or discard changes, reducing the risk of accidental data loss.
- No alert is shown if no changes have been made.

Plan of Care – Print Capabilities

Clinical users can now print comprehensive **Plan of Care** forms directly from the **Resident > Services > Plan of Care** section, supporting improved documentation workflows, regulatory compliance, and care coordination.

The screenshot shows the user profile for Joseph D Larson (Male, 47 y, Dec 3, 1977, 10-A) with tabs for Profile, Medical, Services, Daily Care, and Housing. The 'Services' tab is active, showing the 'Plan of Care' section. A table lists various care areas with their respective outcomes, interventions, and comments. A 'Print form' button is visible in the top right corner of the table area.

Area Of Focus	Expected Outcomes	Services & Interventions	Comments
Effective: 03/26/2025 Next Review: 06/24/2025 Isolation	Effective: 03/26/2025 Next Review: 06/24/2025 Joe will attend activities twice a week	Effective: 03/26/2025 Hospice comes in and visits with Joe three times a week. Role: Nurse Effective: 01/07/2025 Weight Check Activities: Reminders Effective: 03/26/2025	Created 03/26/2025 By Myriah Kern, RN Reviewed with son.
Effective: 03/25/2025 Next Review: 06/24/2025 Elopement	Effective: 03/25/2025 Next Review: 06/24/2025 Joe will remain safe	Effective: 05/23/2024 Behavior: Wandering	
Effective: 03/23/2025 Next Review: 06/24/2025 Fall	Effective: 03/23/2025 Next Review: 06/24/2025 Joe will meet with PT three times a week	Effective: 03/23/2025 Use gait belt with all ambulation. Role: Caregiver Effective: 01/07/2025 Ambulation: Out Prov Effective: 11/10/2024 Ambulation: Physical Assist 1	Created 03/23/2025 By Myriah Kern, RN Met with Joe and his daughter for care conference on 3/23 - no changes to plan of care.
Effective: 03/23/2025 Next Review: 06/24/2025 Hygiene	Effective: 03/23/2025 Next Review: 06/24/2025 Joe will bathe twice weekly with assistance as needed from community staff. Effective: 03/23/2025 Next Review: 06/24/2025 Joe will change clothing to maintain a kept appearance.	Effective: 03/23/2025 Provide an option for soothing music. Role: Caregiver Effective: 03/23/2025 Decrease extra outside stimuli during bath time. Role: Caregiver Effective: 11/10/2024 Bathing: Cueing/Standby	Created 03/23/2025 By Myriah Kern, RN Joe and his daughter had a care conference today and agreed to goals as stated in expected outcomes.

Print Resident-Specific Plan of Care Forms

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- A **print option** is now available within a resident's **Plan of Care** section.
- Clinical users can generate and print forms with:
 - **Resident Information:** Includes name, pronouns, unit, and medical history.
 - **Details:** Areas of Focus, Expected Outcomes, Services, Interventions, and Comments.
 - **Signature Options:** Configurable to include or exclude required signatures and the Plan of Care text block.
- **Date Picker:** Required prior to printing; it determines which time-bound records (e.g., interventions, services) are displayed. Only effective entries for the selected date will appear on the printed form.
- **Custom Toggles:** Users can opt to include comments and reviewed activities for greater control of print content.

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Printed 04/15/2025 4:37 PM



Plan of Care - Effective 04/15/2025
Joseph D Larson (He/Him)
 Unit: 10 - A Birthday: 12/03/1977 Sex: Male

Red Door House
 123 Sunset Ave
 Willmar, MN 89653
 United States
 Phone: (612) 351-5711
 Fax: (612) 986-3654

Allergies: Ace Inhibitors.	Diet: Consistent Carb, Diabetic.
Diagnoses: Acute nonparalytic poliomyelitis (A80.4), Active stage of trachoma (A71.1).	Personal Directives: Resuscitate
	Primary Physician: Greg Stompro

Area of Focus	Expected Outcomes	Services & Interventions	Comments
Effective: 03/26/2025 Next Review: 06/24/2025 Isolation Joe has been spending more time in his room.	Effective: 03/26/2025 Next Review: 06/24/2025 Joe will attend activities twice a week	Effective: 2025-03-26 Hospice comes in and visits with Joe three times a week. Role: Nurse Effective: 2025-03-26 Activities: Reminders Resident prefers card games. Effective: 2025-01-07 Weight Check Check weight daily	Created: 03/26/2025 By: Myriah Kern, RN Reviewed with son. Reviewed 03/26/2025 By: Myriah Kern, RN Isolation Reviewed Expected Outcome 03/26/2025 By: Myriah Kern, RN Joe will attend activities twice a week
Effective: 03/25/2025 Next Review: 06/24/2025 Elopement Joe has attempted to exit.	Effective: 03/25/2025 Next Review: 06/24/2025 Joe will remain safe	Effective: 2024-05-23 Behavior: Wandering	Reviewed 03/26/2025 By: Myriah Kern, RN Elopement Reviewed Expected Outcome 03/26/2025 By: Myriah Kern, RN Joe will remain safe
Effective: 03/23/2025 Next Review: 06/24/2025 Hygiene Joe needs frequent reminders to bathe and change clothing daily.	Effective: 03/23/2025 Next Review: 06/24/2025 Joe will bathe twice weekly with assistance as needed from community staff.	Effective: 2025-03-23 Provide an option for soothing music. Role: Caregiver Effective: 2025-03-23 Decrease extra outside stimuli during bath time. Role: Caregiver	Created: 03/23/2025 By: Myriah Kern, RN Joe and his daughter had a care conference today and agreed to goals as stated in expected outcomes.

Physician Signature: _____ Date/Time: _____

Print Blank Plan of Care Form

- From the Plan of Care listing page, users can now use the ellipsis (...) button to:
 - **Print Form** (with resident data)
 - **Print Blank Form** (for manual completion)
- The **Blank Form** includes:

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- Headers with resident and community details (sourced from settings)
- Grid-style layout for manual entry of plan elements
- Toggle-based control over display of sections like **Signatures** and **Plan of Care Text**

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Plan of Care

Joseph D Larson (He/Him)

Unit: 10 - A Birthday: 12/03/1977 Sex: Male

Red Door House
123 Sunset Ave
Willmar, MN 89653
United States
Phone: (612) 351-5711
Fax: (612) 986-3654

Allergies: Ace Inhibitors.

Diet: Consistent Carb, Diabetic.

Diagnoses: Acute nonparalytic poliomyelitis (A80.4), Active stage of trachoma (A71.1).

Personal Directives: Resuscitate

Primary Physician: Greg Stompro

Area of Focus	Expected Outcomes	Services & Interventions	Comments

Physician Signature: _____ Date/Time: _____

FIXES:

Non-Integrated Pharmacies No Longer Return 404 Errors

- A 404 error was occurring when users attempted to access non-integrated pharmacies from within the system.
- The issue has been resolved to ensure **non-integrated pharmacy records load correctly**, preventing error pages.

Evaluation Scores Now Preserve Decimal Precision

- Evaluation scores were rounding up to whole numbers during finalization (e.g., 8.75 displayed as 9), resulting in inaccurate scoring.
- The system now correctly retains and displays **scores with up to two decimal places** upon signing evaluations.

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- **Note:** Existing evaluations that were already rounded will **not update automatically** and require manual correction if precise scoring is needed.

Evaluation Signing Issue Resolved

- A technical issue prevented users from signing evaluations due to faulty validation.
- Validation logic has been updated, and evaluations can now be signed as expected without blocking errors.

Activity Tab No Longer Retains Incorrect Finalized Data

- When copying forward a finalized evaluation, the **Activity tab** incorrectly retained data from the previous version.
- This also affected printed versions.
- The system now ensures that the **Activity tab only reflects current, in-progress evaluation data** until it is properly signed and finalized.
- Copy-forward behavior was reviewed and updated across multiple evaluation types and resident records to ensure consistency.

EMAR

Custom Cycle Give Times Now Retain User-Entered Values

- Previously, when creating a custom cycle, user-defined give times were being replaced by the order's start time.
- The system now correctly identifies the earliest give time as the start date and maintains the times in chronological order.
- Custom cycles retain all entered times as expected after this update.

Receive Orders > Mismatched Orders Can No Longer Be Saved as New

- Orders identified as having a details mismatch were incorrectly allowed to be edited and saved as new entries.
- This led to duplicate orders appearing in residents' medication profiles.
- The system now enforces proper handling by maintaining the mismatch status, allowing only rejection or replacement.

Audit Logging Accuracy Improved for Validation Results

- Audit messages for updates made via Edit In Receive Orders were inaccurately displaying the validation result as "Potential Duplicate" instead of "Order Details Mismatch."
- Logging logic has been corrected to reflect the actual status, improving audit trail accuracy.
- Additional logging enhancements are planned, but this critical correction has been applied.

Order Start Time Corrected When Using "Start from Current Datetime" Setting

- New orders were occasionally starting with past dates, triggering overdue schedules
- The system now respects the "Start new orders from current datetime" configuration, assigning the appropriate future give time for new orders.

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Start Date Modification Now Allowed When Give Time Is in the Future

- Users previously encountered warnings preventing them from setting the order start date to the current day if the give time was in the future.
 - This restriction has been lifted in appropriate scenarios, permitting updates when no administration conflicts exist.
-

Receive Orders > Refill Handling Now Updates Meds Correctly

- Medication refills were being flagged as potential duplicates instead of updating existing orders, particularly after rejections.
 - The system has been adjusted to properly distinguish refills from duplicates, ensuring correct updates to resident medication profiles.
-

MAR > Overdue Meds Correctly Display in Med Pass

- In certain cases, scheduled medications failed to appear in the resident's med pass despite triggering an overdue alert.
 - A code adjustment has been implemented to resolve the scheduling error and prevent future instances.
-

No More Warnings When Setting End Dates

- Users encountered warnings when unchecking the "No End Date" checkbox—even when there were no schedule conflicts.
 - The validation logic has been refined to allow end date changes without unnecessary warnings
-

BIO Test Medications No Longer Show Repeated Confirm Prompts

- When administering medications with BIO test requirements outside the med pass window, users were shown the confirm dialog twice.
 - This redundant confirmation has been corrected.
 - A single, accurate confirmation prompt is now presented during these scenarios, verified through focused PRN scheduling tests.
-

Custom Cycle Give Times Issue Resolved

- A previously identified issue caused give times in custom cycles to default to the order start time.
 - This has been resolved, and cycles now preserve all entered give times in proper chronological order.
-

Pharmacy DC Now Properly Ends Existing Orders

- A scenario was identified where a Pharmacy DC message labeled as "Order Ending" mistakenly created a new order rather than updating the current one.
 - This occurred due to mismatches between user-modified instructions and the incoming message.
 - The system has been updated to correctly disregard instruction mismatches in this context, preventing unnecessary new orders and maintaining proper validation status.
-

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Expanded Edit Confirmation for Manage Orders

- Med Managers now see a more comprehensive summary of changes in the **Confirm Edit** screen after modifying an order.
- The update ensures that all applicable fields (excluding individual schedule elements) are displayed for review before saving.
- Confirmation messages have also been refined to prompt users to verify changes and adhere to community and psychotropic policy guidelines.

Community Managers Can Now Edit Admin Records as Intended

- Community Managers were previously blocked from modifying administration records, such as reverting a dose from "Administered" to "Not Administered", even when properly authorized.
- The system was applying unintended time window restrictions and misinterpreting confirmation responses.
- These limitations have been addressed, allowing authorized users to perform necessary edits and ensuring that warnings reflect accurate user decisions.

CRM

Activity Timeline Now Handles Special Characters in Emails

- Users encountered errors in the **CRM Activity Timeline** when copying and pasting email content that included emojis.
- Attempting to save resulted in an error.
- The issue has been resolved to ensure that **emails containing emojis can be entered without error** and saved properly in the timeline.

