NEXT Release Notes 2025.05.15

CLINICAL

Clinical Reporting & Configuration Enhancements

Evaluation Configuration: Status Column & Filter Controls

The **Evaluation Configuration** screen now includes more robust filtering and status visibility tools to help clinical teams manage evaluation templates more effectively.

- A new **"Disabled"** status has been added to the status column to clearly differentiate inactive evaluations.
- A **filter** allows users to view evaluations by status: **Draft**, **Published**, or **Disabled**.
- The **default view** shows only Published items, keeping the interface clean while maintaining access to all templates when needed.

Evaluations

Status
Published

Name	Revision	Status
Elopement Risk	1	Published
Fall Risk	1	Published
Level of Care	1	Published

New Report: Basic Level of Care Report

A new **Basic Level of Care Report** has been added under **Clinical > Reports** to aid in care-level management across the community.

- The report lists each resident's **most recently completed Level of Care (LOC) evaluation**.
- Data columns include:
  - Resident Name
  - Assessed Level
  - Total Score
  - Date of Evaluation
  - Evaluation Name
  - Product Type
  - Unit Number
- This report supports **proactive care planning** by helping identify residents who may need **updated or reassigned care levels**.

Product Type

Select values

Resident Name	Assessed Level	Total Score	Completed Date	Assessment Name	Product Type	Unit
Anderson, Susan Jane	Care Level 5	50	09/24/2024	New LOC	MEMORY_CARE	039
Bennett, Bonita	Care Level 3	26	09/09/2024	Master Questionnaire	ASSISTED_LIVING	021
Habill, Jessica Jane		0	02/12/2024	New LOC	ASSISTED_LIVING	003
Harris, Matilda	Care Level 2	23	03/26/2024	Master Questionnaire		051
Houlst, Mitch		11	07/01/2024	8.2024 Level of Care		056
Johnson, Cora	Care Level 3	27	06/21/2023	Master Questionnaire	ASSISTED_LIVING	007
Kasen, Jolene Jane		0	02/16/2024	Test 123	ASSISTED_LIVING	008
Kingsburg, Barry George		0	02/26/2024	New LOC		050
Smithers, Allen		0	02/01/2024	New LOC		
Stanton, Cheryl Susan	Care Level 2	6	06/09/2023	Master Questionnaire	ASSISTED_LIVING	004
Tao, Eileen Jane	Care Level 3	40	06/09/2023	Master Questionnaire	ASSISTED_LIVING	006
Zymmer, Bonita		0	04/16/2024	New LOC	ASSISTED_LIVING	024 - B

Leave of Absence Report – Enhanced Tracking

A new **Leave of Absence (LOA) Report** is now available to help support staff track resident movements more precisely.

- Located under **Clinical > Reports**, the LOA Report provides:
  - A sortable and filterable list of all LOA entries.
  - Export options to **Excel** and **printable formats**.
  - Logic to handle **partial overlaps in leave dates**, providing accurate coverage of all leave scenarios.
- This tool supports **community-level oversight** of resident absences and helps maintain regulatory and staffing accuracy.

Leave of Absence Report

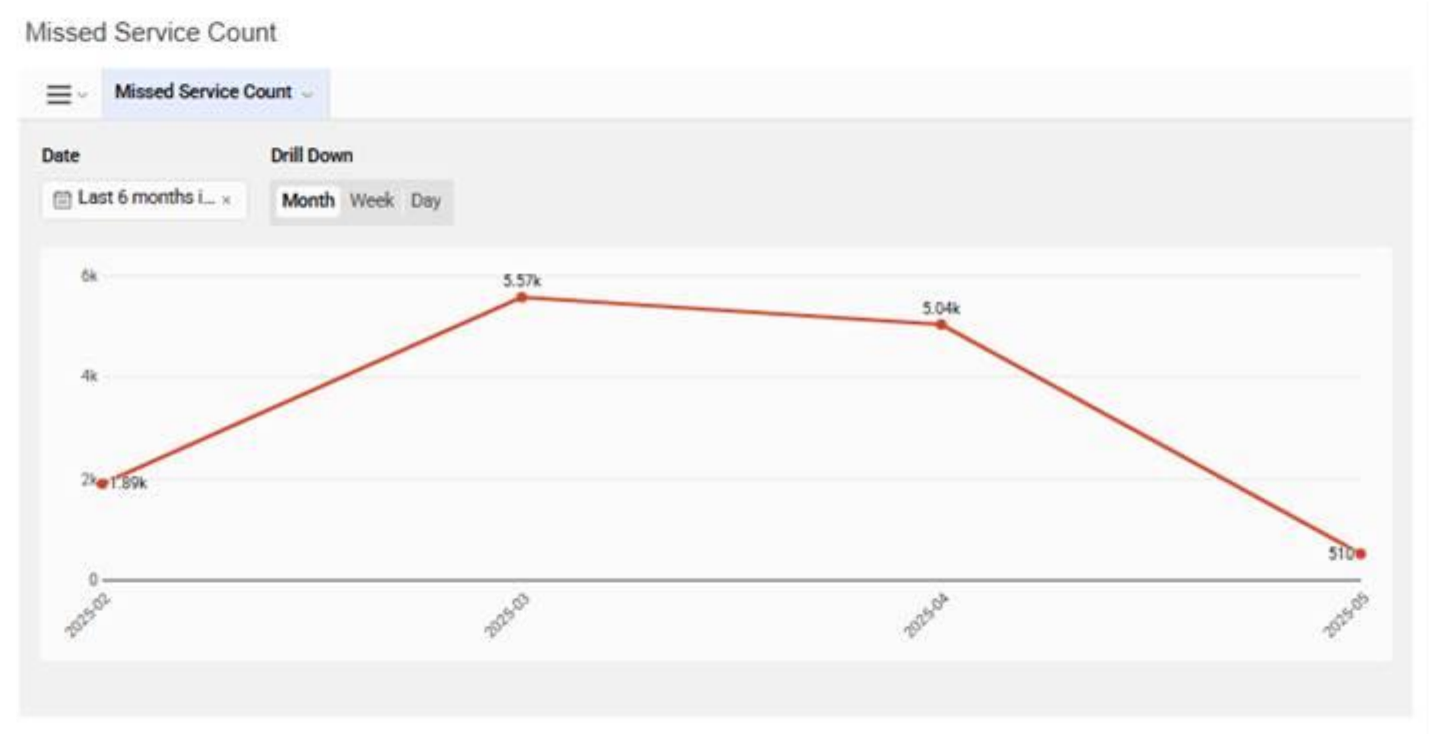
Resident Name	Unit	Start Date And Time	Reason	Description	To	Why	End Date And Time	Days on Leave	HospitalVisitOutco...	Discharge Diagnosis
				checked out.						
Gary Donald	040	04/01/2024 11:23 AM	Hospital - Unplanned	Unplanned visit to hospital	---	---	04/12/2024 09:23 AM	10	---	---
Anderson Josie	009	02/19/2024 03:18 PM	Out with Family	---	---	---	---	---	---	---
Anderson Susan	039	04/19/2024 08:54 AM	Out with Family	Out with Family for the weekend	---	---	04/21/2024 07:54 AM	1	---	---
Johnson Cora	007	05/06/2023 09:08 AM	Out with Family - Meds Sent With	---	---	---	05/07/2023 09:08 AM	1	---	---
Alley Rose	---	10/02/2023 09:47 AM	Vacation	LOA	---	---	09/15/2023 12:26 PM	-16	---	---

Clinical Dashboard – Resident Monitoring Enhancements

Three new widgets have been added to the **Clinical Dashboard** to improve real-time resident health insights and support early intervention efforts.

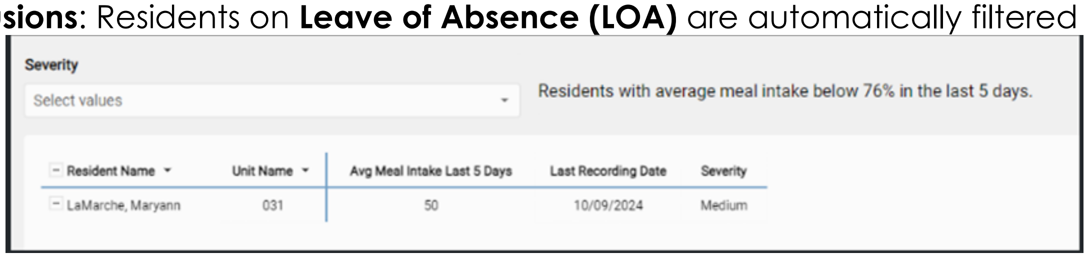
Missed Service Count Tracking

- A new **"Missed Service Count"** card displays a **line graph** of missed services over time.
- **Filters**: Date range, community, and drill-down levels (month, week, day).
- **Definition**: A service is considered "missed" if not completed by the end of the provider's shift.



Bowel Movement Alert Widget

- The **"Bowel Movement Alert"** widget identifies residents who have **not had a bowel movement in 2+ days**.
- Residents are grouped by **severity level**:
    - **Low: 2 days since last BM**
    - **Medium: 3 days since last BM**
    - **High: 4+ days since last BM**
- **Details shown**:
    - Resident name
    - Unit
    - Days since last BM
    - Last BM date
- **Filters**: Severity level
- **Exclusions**: Residents on **Leave of Absence (LOA)** are automatically filtered out.



Meal Intake Alert

- This widget monitors **average meal intake over the last 5 days** and flags low intake trends.
- **Display columns**:
    - Resident Name
    - Unit

   - Average Meal Intake (%)
   - Last Recorded Date
   - Severity Level
- **Severity Color Coding**:
   - **Red**: ≤33% (High)
   - **Yellow**: 34–66% (Medium)
   - **Green**: 67–75% (Low)
- **Filters**: Severity filter for quick prioritization.
- **Exclusions**: Residents with >76% intake and those on **LOA**.

Severity

Select values

List of residents without a bowel movement in 2 or more days. Excludes residents on leave.

Severity	Alert	Resident Name	Unit Name	Days Since Last BM	Last BM Date
High	4+ days since last BM	Monson, Mike	120	55	08/14/2024
High	4+ days since last BM	Habill, Jessica	041	331	11/13/2023
High	4+ days since last BM	Gary, Donald	040	332	11/12/2023
High	4+ days since last BM	Stanton, Cheryl Susan	004	488	06/09/2023
High	4+ days since last BM	Johnson, Cora	007	488	06/09/2023
High	4+ days since last BM	Harris, Matilda	051	488	06/08/2023
High	4+ days since last BM	Kingsburg, Barry George	005	489	06/08/2023
High	4+ days since last BM	Tao, Eileen Jane	006	489	06/08/2023

State Forms

State Forms – Brand-Level Access & Community Visibility

A new **State Forms** feature set has been introduced, offering Brand Admins centralized management of regulatory documentation while allowing specific communities access to assigned forms.

State Forms Listing Page (Brand Admin)

- A new **State Forms Listing Page** is now available to **Brand Admin** users.
- The page includes filters for:
   - **Draft**
   - **Published**
   - **Disabled**
   - **All** (default)
- Brand Users can view form details by selecting any item in the list.
- The table includes columns for:
   - **Form Name**
   - **Associated State**
   - **Status**

State Forms Detail Page

- Accessible to **Brand**, the detail page allows:
   - Viewing and editing **form structure**, including **sections**, **questions**, and **answers**.
   - Managing form-level **Code** and **Version #**.
- The layout and behavior closely resemble the **Clinical Evaluation configuration** interface.

- **Permission controls** restrict access—users below Brand level cannot view or modify State Forms via Settings.

State Forms – Community Access & Evaluation Configuration

Editable Evaluation Details in State Forms (Community Manager Access)
Community Managers now can **edit evaluation details** within State Forms in Clinical Configuration for supported communities:

- Specifically, users can modify **Service** and **Point** fields in applicable evaluations.
- Access is provided through an **Edit modal**, where:
    - **Certain fields remain non-editable** to preserve regulatory compliance.
    - **Services and point values** can be adjusted for tailoring future assessments.
- All edits apply **only to future evaluations**, ensuring historical data in resident records remains unchanged and auditable.

Minnesota State Forms – Current Client Roster (Comprehensive), MN Discharged/Deceased Client Roster, MN Current Client Roster (Basic), and MN Current Resident Roster: State Evaluations

These MN forms have been added to Eldermark NEXT. This feature supports both Brand-level configuration and community-level usage for clinical documentation and compliance.

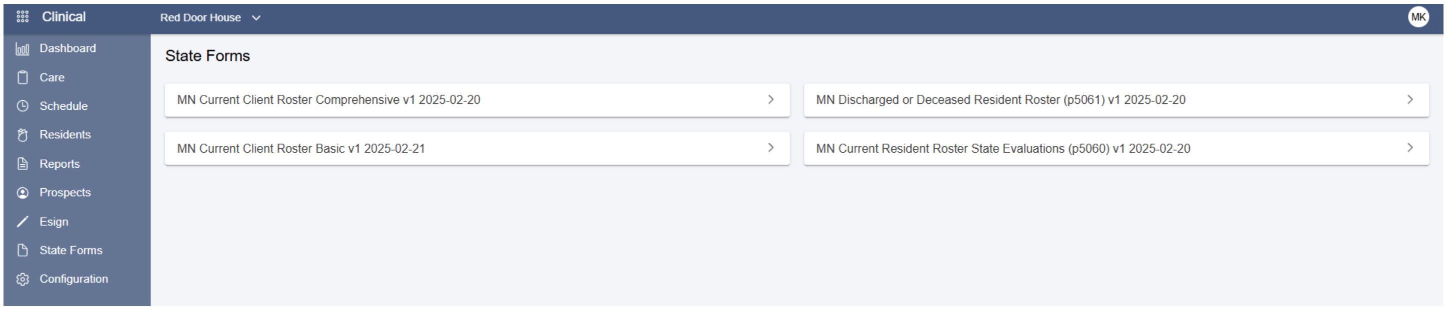
Forms Imported to Brand from Legacy

- Once available at the Brand level, the form becomes visible to **all Minnesota-based communities**.
- Each community must **individually enable** the evaluation for it to appear in their workflow.
- Activation follows specific governance rules to ensure proper control and compliance.

State Form Card Added to Clinical > State Forms

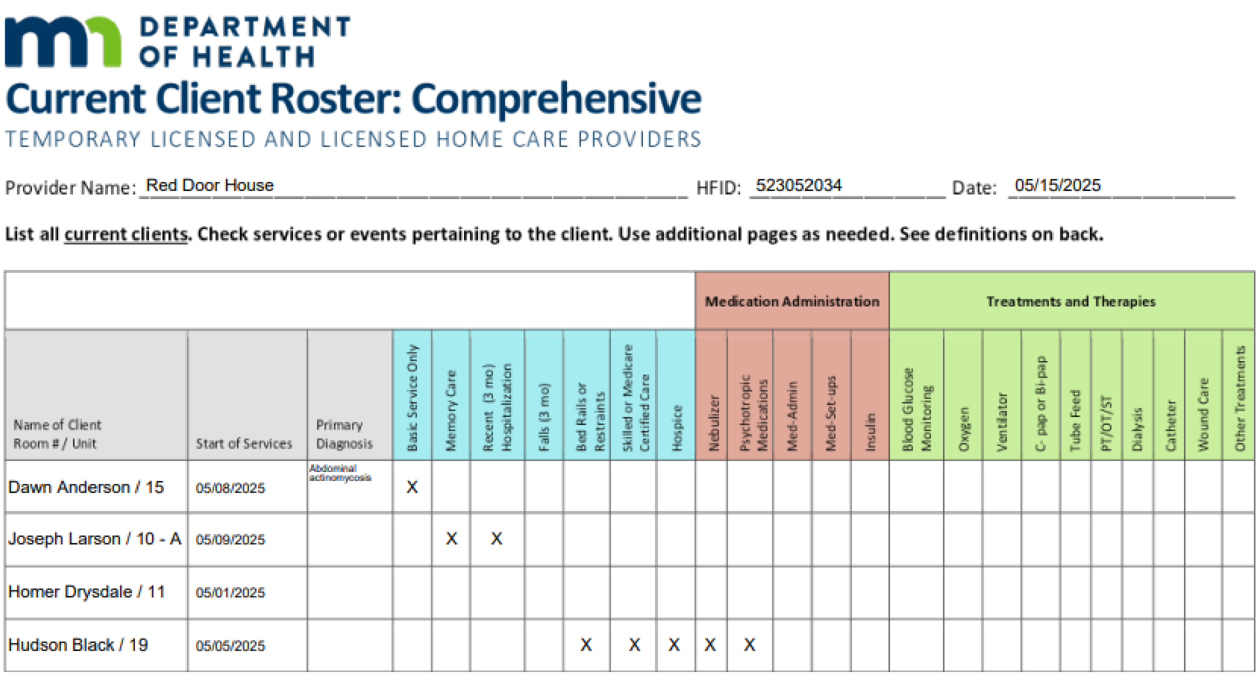
- A card representing the **MN Current Client Roster (Comprehensive), MN Discharged/Deceased Client Roster, MN Current Client Roster (Basic) and MN Current Resident Roster: State Evaluations** now appears within **Clinical > State Forms**.
- This card enables clinical providers to **print resident rosters** while adhering to compliance standards.
- Functionality includes:
    - Filtering out residents without a **finalized evaluation**
    - Excluding specific **care levels** based on configurable criteria

NEXT Release Notes



Printable MN Current Client Roster (Comprehensive), MN Discharged/Deceased Client Roster, MN Current Client Roster (Basic) and MN Current Resident Roster: State Evaluation Forms

- Users can now generate a **printable version of the roster** that includes all **active residents**, based on their **most recent finalized evaluation**.
- **MN Discharged/Deceased Client Roster** print forms for discharged residents from the last 6 months.
- Additional filter options allow:
  - **Excluding residents** by **Unit Product type**
  - Ensuring only relevant data is pulled for reporting
- The print form aligns with **Minnesota state requirements**, supporting audits and compliance reviews.



DEPARTMENT OF HEALTH

Current Client Roster: Comprehensive

TEMPORARY LICENSED AND LICENSED HOME CARE PROVIDERS

Provider Name: Red Door House HFID: 523052034 Date: 05/15/2025

List all current clients. Check services or events pertaining to the client. Use additional pages as needed. See definitions on back.

										Medication Administration					Treatments and Therapies									
Name of Client Room # / Unit	Start of Services	Primary Diagnosis	Basic Service Only	Memory Care	Recent (3 mo) Hospitalization	Falls (3 mo)	Bed Rails or Restraints	Skilled or Medicare Certified Care	Hospice	Nebulizer	Psychotropic Medications	Med-Admin	Med-Set-ups	Insulin	Blood Glucose Monitoring	Oxygen	Ventilator	C- pap or Bi-pap	Tube Feed	PT/OT/ST	Dialysis	Catheter	Wound Care	Other Treatments
Dawn Anderson / 15	05/08/2025	Abdominal actinomycosis	X																					
Joseph Larson / 10 - A	05/09/2025			X	X																			
Homer Drysdale / 11	05/01/2025																							
Hudson Black / 19	05/05/2025						X	X	X	X	X													

DEPARTMENT OF HEALTH

Current Client Roster: Basic

TEMPORARY LICENSED AND LICENSED HOME CARE PROVIDERS

Provider Name: Red Door House HFID: 523052034 Date: 05/15/2025

List all current clients. Check services or events pertaining to the client. Use additional sheets if needed. See back for definitions.

Name of Client Room # / Unit	Start of Services	Primary Diagnosis	Recent (3 mo) Hospitalization	Falls (3 mo)	ADL Assistance	Medication Reminders	Standby Assistance	Treatment Reminders	Modified Diet	Laundry	Housekeeping	Meal Preparation	Shopping	Other
Dawn Anderson / 15	05/08/2025	Abdominal actinomycosis			X			X		X				

DEPARTMENT OF HEALTH

Current Resident Roster: State Evaluations

ASSISTED LIVING PROVIDERS

Provider Name: Red Door House HFID: 523052034 Date: 05/15/2025

List all current residents. Check services or events pertaining to the resident. Use additional pages as needed. See definitions on back.

*Note: if a resident is housing only and not receiving services, mark only that box. Further fields are for residents receiving services only.

											Medication Administration					Treatments and Therapies									
Name of Resident Room#/unit	**Housing Only, No services**	**Start of Services**	**Primary Diagnosis**	**Housekeeping, laundry, meals**	**Memory Care**	**Recent (3 mo) Hospitalization**	**Falls (last 3 mo)**	**Bed rails or restraints**	**Skilled or Medicare certified care**	**Hospice**	**Nebulizer**	**Psychotropic Medications**	**Med-Admin**	**Med Set-up**	**Insulin**	**Blood Glucose Monitoring**	**Oxygen**	**Ventilator**	**C-Pap or Bi-Pap**	**Tube Feed**	**PT/OT/ST**	**Dialysis**	**Catheter Care**	**Wound Care**	**Other**
Joseph Larson / 10 - A		05/09/2025			X	X		X	X			X							X		X				

DEPARTMENT OF HEALTH

Discharged or Deceased Resident Roster: State Evaluations

ASSISTED LIVING PROVIDERS

Provider Name: Red Door House HFID: 523052034 Date: 05/15/2025

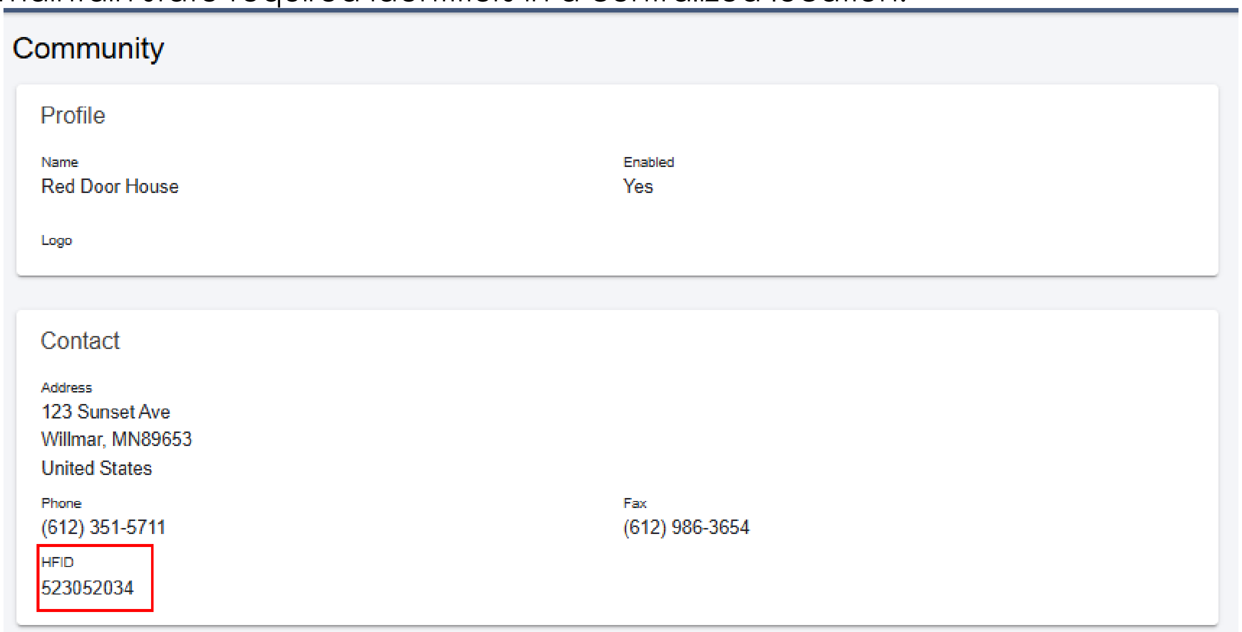
List all discharged or deceased residents for the past six months.

Name of Resident Room#/unit	Housing Only, No Services	Start of Services	Primary Diagnosis	Date of Discharge or Death	Place of death occurred (NH, AL, Hospital, etc)	Discharged to: (NH, AL, Hospital, Home)	Was termination of services notice and AL contract termination notice provided? y/n
Sarah Brown	X			11/19/2024	Home	Assisted Living	No

HFID Field Added for Minnesota Communities

To support regulatory and compliance requirements specific to Minnesota:

- A new **HFID (Health Facility ID)** field has been added to the **Community Contact Card** and **Contact Modal** for communities located in **MN**.
- This field is visible only when the community is designated as part of **Minnesota**—it will not appear for communities in other states.
- This enhancement ensures that organizations operating in MN can document and maintain state-required identifiers in a centralized location.



Oregon Compliance – Resident Indicator Profile Rollout

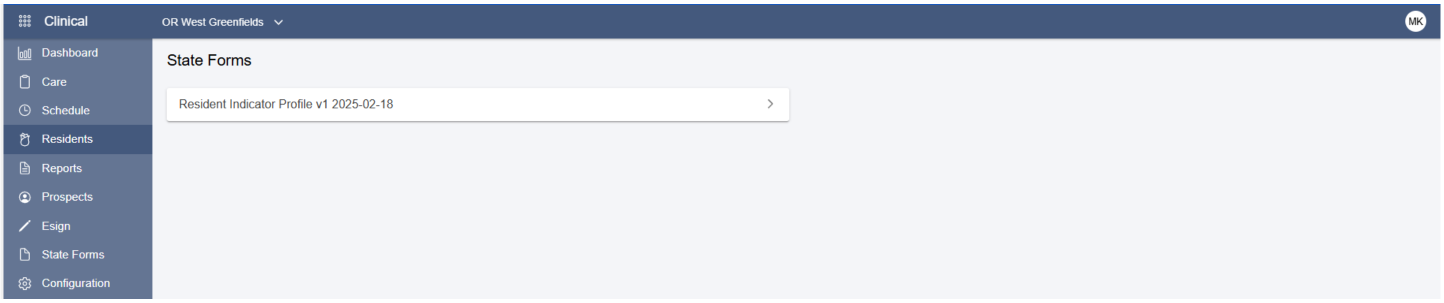
To meet **Oregon state regulatory requirements**, a new **Resident Indicator Profile** tool has been added to the platform. This enhancement enables standardized evaluation documentation and streamlines form generation for communities operating within Oregon.

Resident Indicator Profile Imported into Brand State Forms

- The **Resident Indicator Profile** evaluation has been added to the Brand's **State Forms** catalog.
- This step ensures compliance readiness and centralized deployment across all **Oregon** communities.
- Once imported, each **individual community must enable the evaluation** for it to become active.

Clinical > State Forms – New Profile Card Added

- A new **Resident Indicator Profile** card is now available under **Clinical > State Forms**.
- This card allows clinical providers to:
  - Print forms for **active residents** (excluding those without a finalized evaluation)
  - Filter residents based on **care level** before printing
- Clicking the card opens a modal interface that provides filtering and print configuration options.



Printable Form for State Review

- The **Resident Indicator Profile form** has been added to the **Print: State Forms** section.
- It supports regulatory formatting and includes:
  - **All active residents**, including those on **Leave of Absence**
  - Data sourced from the **most recent finalized evaluation**
  - Filters to exclude specific **Unit Product types** at print time
- The form is dynamically generated and adheres to the formatting requirements outlined by state compliance guidelines.

Resident Indicator Profile for OR West Greenfields

Unit	Resident	Admit Date	Has Behavior Symptoms	Has Dementia Symptoms	Has History of Falls & is A Fall Risk	Has Siderails	Is Currently Receiving Dialysis	Is Currently Receiving Home Health Services	Receives Transfer Assistance	Currently has Skin Issues	Has an Indwelling Urinary Catheter	Has Recently Experienced Weight Gain/Loss	Is an Insulin Dependent Diabetic & on Routine CBG's	Is Incontinent of Bladder	Is on a Sliding Scale Insulin Regimen & Receives Routine CBG's	Is on Anticoagulant Therapy/Blood Thinners	Receives Pain Medications(s) PRN or Routinely	Requires Assistance at Meals	Takes Psychoactive Medications	**Total**
101	Tyler Henderson	05/01/2000																		0
102	Judy Gundering	09/05/2020																		0
103	Holly Paulert	01/15/2006																		0
104 - a	Sarah Johnson	05/15/2025	0	0	1	1	0	0	1	1	0	0	1	1	0	0	1	1	0	8
		Total			1	1			1	1			1	1			1	1		8

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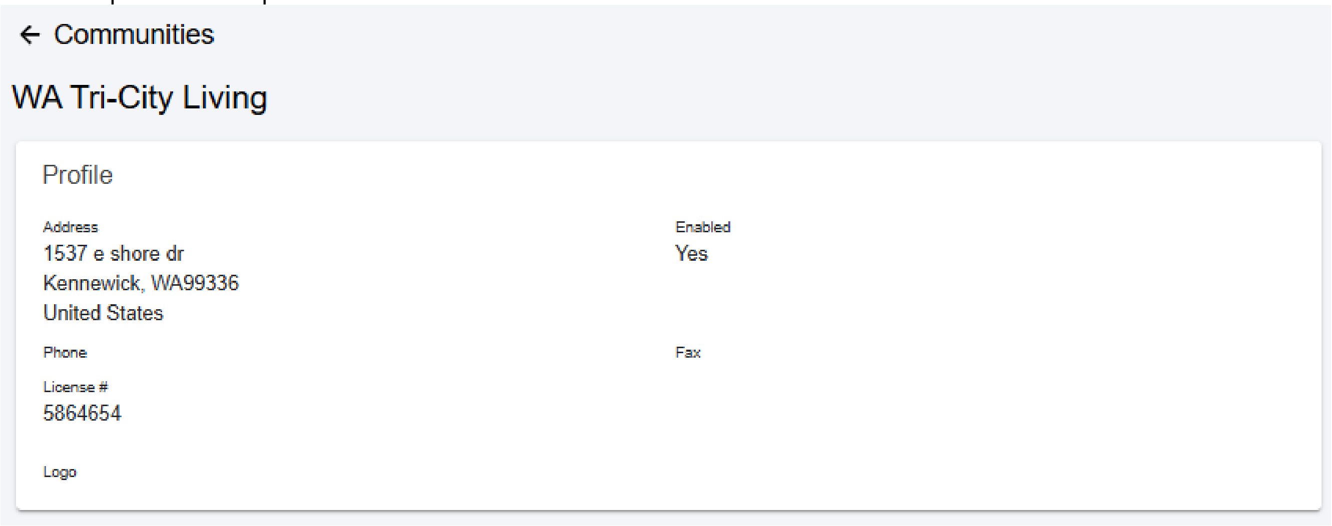
State Compliance – Washington License Number Field

To support Washington-based communities, a new field has been introduced within the community setup interface.

License Number Field for WA Communities

- A **License #** field is now available on the **Community Contact Card** and **Contact Modal** for communities based in **Washington state**.
- This field:
  - Is **only visible** if the community is registered in **WA**
  - Allows administrators to **enter or update** the License #
  - Saves and displays updates on the community's detail page in real time
- Communities outside of Washington **will not see** this field, preserving a clean and state-specific experience.



eSign

eSign Integration – Dropbox HelloSign

Eldermark now supports **electronic signatures** through a secure integration with **Dropbox HelloSign**, allowing communities to streamline document workflows, increase compliance, and reduce manual paperwork.

- Supported document types include:
  - **Service Agreements**
  - **Coming Soon:** Plan of Care
  - **Coming Soon:** Evaluations
- Eldermark provides real-time **status updates** within the platform to track progress and completion.

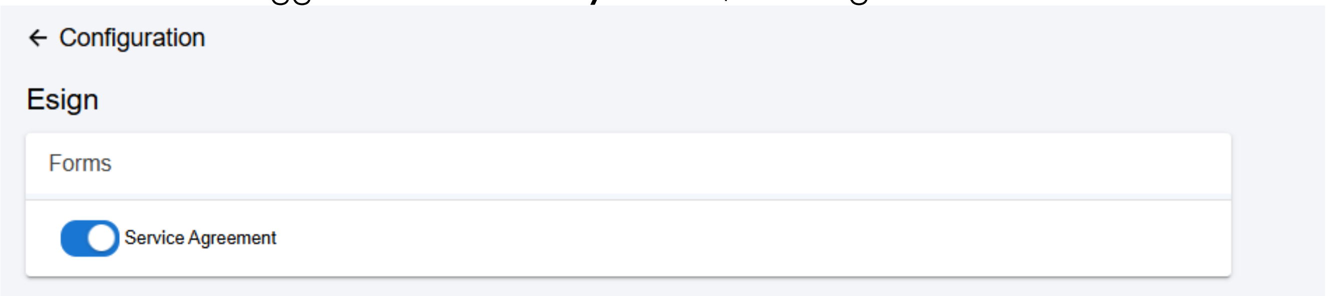
eSign Configuration for Clinical Managers

- A new **eSign card** has been added under **Clinical Configuration**, allowing authorized users to manage eSign settings at the **community level**.
- The eSign card appears only when eSign functionality is enabled at the **community setting level**.

Form-Level eSign Settings in Clinical Configuration

- Within the eSign configuration panel, Clinical Managers and above can:

  - Enable or disable eSign for specific document types
  - Manage settings for each form independently using toggle switches
- **Default Setup**:
  - The Service Agreement appears as the default form
  - All toggles are **disabled by default**, allowing full user control over activation

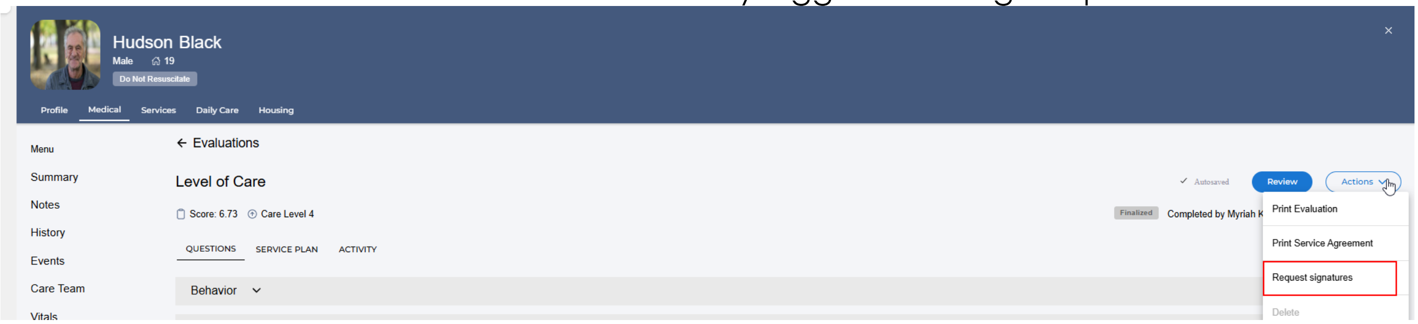


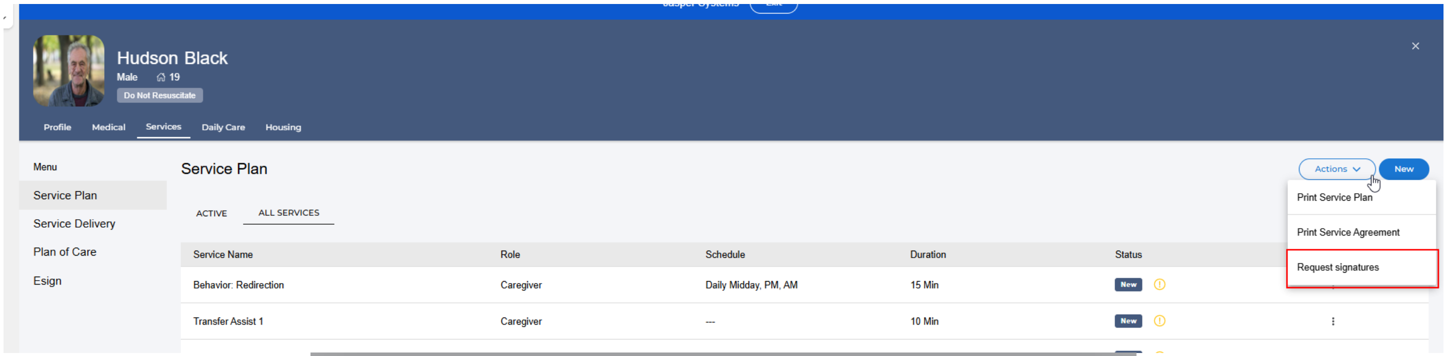
eSign brings a new level of efficiency and compliance to clinical documentation by digitizing traditionally paper-heavy processes. It also supports customizable rollout based on individual community needs and organizational policies.

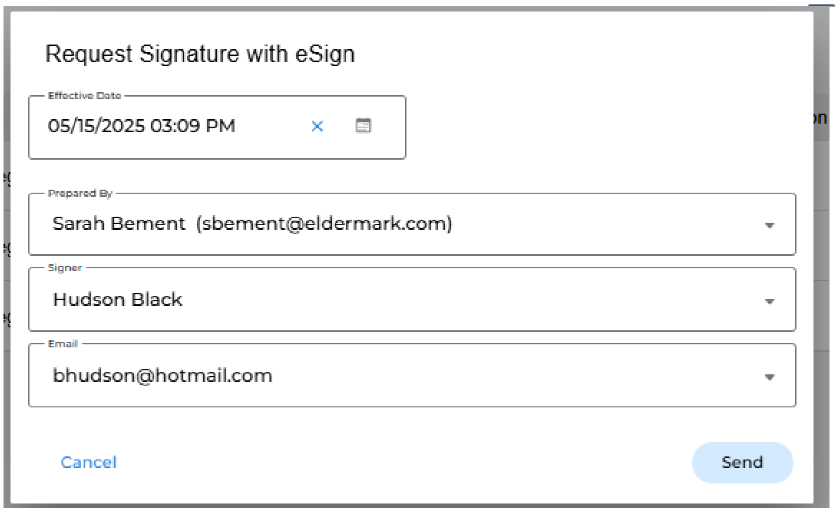
Resident-Level eSign Workflow Enhancements
New features have been introduced to streamline **eSignature collection and tracking** directly from the resident record, enhancing clinical workflows and improving transparency in document management.

Service Agreement eSign Request from Resident Record

- Clinical providers can now initiate eSignature requests for **Service Agreements** directly from the **Resident's chart**, provided eSign is enabled for the community.
- Key workflow features:
  - A **"Request Signatures"** action button is available within the service agreement section.
  - A **recipient selection modal** enables users to choose who will receive the document for signature.
  - Real-time **status synchronization** ensures Eldermark reflects updates as signatures are completed.
  - Email notifications are automatically triggered during the process.

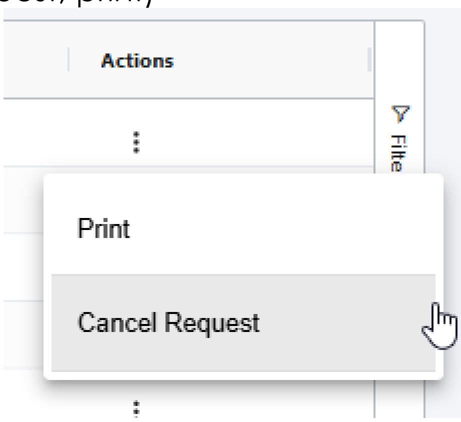






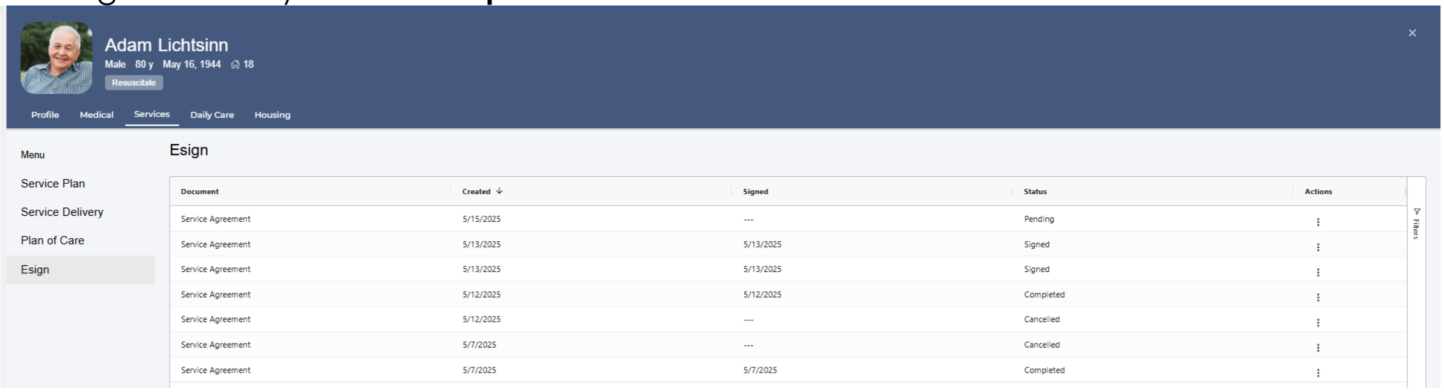
eSign Document List in Resident Record

- A new **eSign tab** has been added under **Resident > Services > eSign**.
- This feature provides a **comprehensive view of all eSigned documents** associated with the resident.
- The list includes:
  - **Document Type**
  - **Created Date**
  - **Signed Date**
  - **Status**
  - **Actions** (e.g., cancel request, print)



- Filtering options are available for:
  - **Document type**
  - **Status**

- **Date ranges**
- Visibility is controlled by eSign activation at the **community level**, and access is governed by **role-based permissions**.



Clinical eSign Document Listing Page

- A dedicated **"eSign" section** has been added to the **left navigation menu**, leading to a **comprehensive listing page** of all clinical eSign documents across the community.
- Features include:
  - **Sortable and filterable table** of documents
  - Columns for **Document Type, Resident, Created Date, Signed Date, Status**
  - **Action options**: Print, and Cancel (where applicable)
  - **Real-time status updates**
  - **Persistent storage** for auditing and historical tracking

eSign Document Printing and Preview from Resident Record

To enhance clinical documentation workflows, users can now **preview and print historical eSign documents** directly from a resident's record, ensuring better access to signed forms and more accurate printing.

New Print & Preview Capabilities for eSign Documents

- **Location**: Accessible under **Resident > Services > eSign or eSign Document Listing Page**
- **Actions Menu**: Each eSign document now includes a menu with the option to print.
- **Key Features**:
  - **Preview Accuracy**: The preview faithfully reflects the final printed version, including signature placement and formatting.
  - **Print Output**: Printed copies are guaranteed to **match the preview**.

NEXT Release Notes

ServiceAgreement

WyndmereHomestead
Address
606Gilead Ave
Wyndmere, MN58081
USA

AndrewTalls Unit03 Effective05/05/20250838AM

Signatures

Andrew Talls

05 / 05 / 2025

Resident or RepresentativeSignature Relationshipto Resident Date

Myriah Kern

05 / 05 / 2025

CommunityRepresentative Relationshipto Resident Date

Role-Based Access – Concierge Role Permissions Update
A refinement has been made to the **Clinical Concierge role** to ensure compliance with organizational access standards and promote secure handling of resident information. These updates ensure that user roles are tightly scoped and reflect real-world responsibilities, enhancing data governance and user accountability across communities.

1. Settings
- **Access:** No Access

2. CRM
- **Access:** No Access

3. EMAR
- **Access:** No Access

4. Risk Management
- **Access:** No Access

5. Billing
- **Access:** No Access

Dashboard & Reports
6. Dashboard
- **Access:** Read

7. Reports
- **Access:** Create, Read, Update

Prospect & Resident
8. Prospect
- **Access:** No Access

9. Resident
- **Access:** Read, Update

Profile Sections
10. Demographic
- **Access:** Full access

11. Contacts

- **Access:** Full access

12. Accommodations
- **Access:** Full access

13. Agencies
- **Access:** Full access

14. Insurance
- **Access:** Full access

Medical Records

15. Summary
- **Access:** Full access

16. Notes
- **Access:** Full access

17. History
- **Access:** Full access

18. Events
- **Access:** Full access

19. Vitals
- **Access:** Full access

20. Labs
- **Access:** Full access

21. Input/Output
- **Access:** Full access

22. 23. Evaluations
- **Access:** Read

24. Care Team
- **Access:** Full access

Service Management

25. Service Plan
- **Access:** Full access

26. Service Delivery
- **Access:** Read

Daily Care

27. Daily Care
- **Access:** Read

Schedule

30. Shift Status
- **Access:** Read

31. Service Alerts
- **Access:** No Access

32. Not Completed
- **Access:** No Access

33. Active

WWW.ELDERMARK.COM 866-833-2270 SUPPORT@ELDERMARK.COM

- **Access:** No Access

34. Past

- **Access:** No Access

Configuration Modules (All Tabs)

35. Service Providers

- **Access:** Read

36. Care Level

- **Access:** Read

37. Evaluation

- **Access:** Read

38. Service Catalog

- **Access:** Read

39. Forms

- **Access:** Read

Clinical Fixes

Resident Unit Numbers Now Display Correctly on Reports

- **Issue**: Resident unit numbers were intermittently missing from the **Resident Roster** and other reports, despite being assigned in the system.
- **Resolution**: A **scheduled job** was implemented to auto-update unit names, ensuring proper visibility across all relevant reports going forward.

Sentinel Event Not Auto-Selecting in Incident Records

- In the **Risk Management module**, when recording **Medical Incidents** or **Incident/Accidents**, the **Sentinel Event** flag was not auto-populated as expected.
- The configuration was supposed to default this field to "Yes" or "No" based on incident type, but it remained blank.
- The behavior has been corrected to ensure **auto-selection logic now functions as designed**, improving incident record accuracy.

Plan of Care – Single Services Now Properly Marked as Resolved

- **Issue**: Single Services with only an effective date were incorrectly remaining visible on all future printed forms without a resolved date.
- **Resolution**: The printing logic now automatically marks these services as **resolved** after the effective date. They appear **greyed out** with both effective and resolved timestamps, aligning with expected behavior.

LOA Event Date Correction

- **Issue**: A resident's **Leave of Absence (LOA)** start date incorrectly displayed as March 4 instead of March 3, due to **UTC-to-local time zone conversion errors**.
- **Resolution**: The issue was validated and corrected. LOA dates now reflect the proper **local time** in all views, across environments.

Care Level Time Now Rounds to Two Decimal Places

- **Issue**: Time values on the **Care Level card** displayed extended decimal digits following evaluations.
- **Resolution**: The system now **rounds time values to two decimal places**, ensuring cleaner display and easier interpretation.

Org Admin Permissions Re-aligned

- **Issue**: **Org Admins** had unintended access to **modify community names** and **enable/disable communities**.
- **Resolution**: Access control was corrected. These actions are now restricted to **Brand Implementation** roles and higher only.

Prospects Marked 'Ready for Evaluation' Removed from Incomplete Admissions

- **Issue**: Prospects marked as **'Ready for Evaluation'** continued appearing on the **Incomplete Admissions Dashboard**.
- **Fix**: Logic was updated to exclude these prospects as expected. Fix has been **validated in QA**.

LOA Status Now Displays Correctly in Active/Inactive Lists

- **Issue**: Residents with completed LOAs were missing from both **active and inactive** lists.
- **Cause**: Duplicate LOA records and sort order confusion.
- **Resolution**: The system now ensures the **most recent LOA is prioritized**, and clients are guided to manage duplicates as needed.

Resolved: Document Download Fails When Filenames Include Commas

- **Issue**: Filenames with commas caused failures blocking downloads from **Resident > Profile > Personal Directives**.
- **Resolution**: The backend has been updated to handle commas in filenames.

Care Level Card Now Displays Evaluation Title Only

- **Issue**: The Care Level card was incorrectly showing **scheduling patterns** alongside the evaluation title.
- **Resolution**: It now **displays only the evaluation title**, improving clarity for clinical users.

CRM

CRM Enhancements – Workflow, Visibility, and User Experience

Automatic Open of New Contact Records

- **Enhancement**: When users save a new **Contact** or **Referral Source** in CRM, the system now automatically opens the new record upon creation.
- **Impact**: Eliminates the need to manually search for new entries, improving efficiency and reducing navigation friction.
- **Benefit**: Streamlines workflows for managing leads, prospects, and influencers, particularly during high-volume intake periods.

CRM Configuration Screens Default to 'Enabled' Status

- **Update**: All CRM configuration listing screens now **default to showing only 'Enabled' items**.
- **Rationale**: Prevents confusion caused by previously inconsistent filters across screens.
- **User Control**: Users may still adjust filters to view **'Disabled'** or **'All'**, but **'Enabled' remains the standard default** to promote clarity and accuracy.

Full Activity Note Visibility in CRM Cards

- **Improvement**: The full text of **sales activity notes** now displays in the **Prospect Timeline** and **Activities Listing** screens.
- **Previous Limitation**: Users had to switch screens to view full notes, disrupting context during follow-up or decision-making.
- **New Behavior**:
  - Notes now appear **fully expanded**
  - Cards maintain **chronological order**
  - Supports improved **task tracking and cross-team communication**

Referrers Listing Screen Defaults to Organizations Only

- **Update**: The **Referrers Listing Screen** now displays **referral source organizations by default**, with a separate option to filter in **professional contacts**.
- **Goal**: Align the view with legacy workflows and reduce clutter from mixing individual and organizational contacts.
- **Benefits**:
  - Cleaner interface
  - Easier identification of key referrers
  - Better support for marketing and outreach tracking

CRM Contact Listing – Default Sorting Update for Prospects & Leads

To improve efficiency for sales and outreach teams, the **Contacts listing screen** has been enhanced with a smarter default sort order and a new date-based column.

Updated Default Sort for Prospects and Leads

- **New Default Behavior**: **Prospects and Leads** now sort by **most recently created** first, helping teams focus on **fresh opportunities**.
- A new **"Date Became Prospect"** column has been added:
  - Fully **sortable** in reverse chronological order
  - Displayed alongside existing columns such as **Name**, **Status**, and **Contact Type**
- **User Experience**:
  - Sorting preference will **persist across sessions**
  - Users can still manually change the sort and reset as needed

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Unchanged Sorting for Other Contact Types

- **Referral Sources** and **Residents** continue to sort **alphabetically** by default, preserving expected behavior for those categories.

CRM Reporting Enhancements – Embedded Reports for Sales, Prospects & Units

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NEXT Release Notes

A suite of embedded reports has been added to the CRM system, improving visibility into user performance, outreach efforts, and prospect engagement trends.

Neglected Prospects Report (Dashboard)

- **Purpose**: Highlights **prospects with no upcoming or overdue activities**, helping users follow up on leads that may otherwise fall through the cracks.
- **Details**:
    - Report lists prospects tied to the current community.
    - Helps prioritize re-engagement and follow-up actions.
    - Includes standard embedded report features (pagination, filters, sorting).

Employees by Close Rate Report

- **Location**: **Reports > Employees by Close Rate**
- **Purpose**: Tracks performance by displaying **prospects created vs. converted to residents** by each team member.
- **Filters & Sorting**:
    - Sort by **Close Rate**, **Prospects Created**, **Conversions**.
    - Drill-down enabled for detailed activity insights.

Top Communicators Report

- **Location**: **Reports > Top Communicators**
- **Purpose**: Identifies CRM users with the **most or least communication tasks**, supporting team accountability.
- **Features**:
    - Horizontal bar chart filtered by **task type**, **completion status**, and **date range**.
    - Export options: **Email** or **PDF**.
    - Interactive: Click to drill into specific user activity.

Prospects by Zip Code Report

- **Location**: **Reports > Prospects by Zip Code**
- **Purpose**: Helps users understand **geographic distribution** of incoming prospects.
- **Visualization**:
    - **Pie chart** grouped by zip code and **prospect creation date**.
- **Filters**:
    - **Date range**
    - Option to **hide unknown zip codes**
    - Filter for **converted prospects only**

Vacant Units Report

- **Location**: **Reports > Vacant Units**
- **Purpose**: Displays a detailed list of **available units**, helping sales teams identify real-time inventory.
- **Features**:
    - Embedded via **Sigma Computing**
    - Filters: **"As of" date**, **Floor plan**

  - No community selection filter; report reflects the **current user's community**

CRM Fixes

"%20" Appearing in Activity Notes

- **Issue**: In certain cases, text saved in CRM activity notes was corrupted with %20 replacing every space, especially for notes over **7,000 characters**.
- **Resolution**: The redundant request has been removed, and text now saves **cleanly without encoding errors**, even for longer entries.

"Current Occupancy by Living Preference" Dashboard Now Displays Correct Data

- **Problem**: The dashboard incorrectly displayed **"Memory Care"** as a living preference, despite no such setting in associated resident records.
- **Resolution**: Data sources have been corrected to reflect **resident-level information**, ensuring occupancy dashboards display accurate and intended metrics.

Activity Timeline and Completed Communications Now Saving Properly

- **Problem**: The **Activity Timeline** failed to save new sales activities or load completed ones. Some scheduled and completed activities also went missing.
- **Resolution**: A fix has now been deployed, resolving timeline errors and restoring expected functionality.

Time Shift When Completing Activities in "Today" Tab

- **Issue**: Completing an activity in the **"Today" tab** caused a **6-hour time shift**, particularly when using **Central or Eastern Time Zones**.
- **Resolution**: Time zone handling logic has been corrected to ensure **proper saving and display** of due/completion times without offset.