

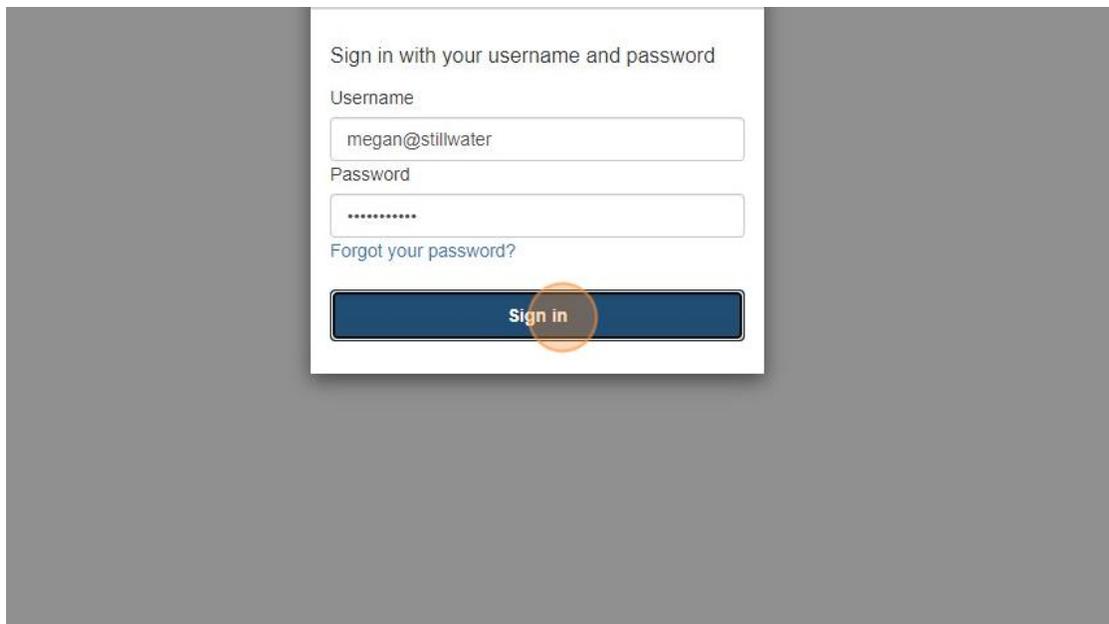
How to Access and View Resident Profile Information

Made by Megan Mann with Scribe

1. Navigate to [[Eldermark Next]]
2. Click "LOGIN"



3. Click Sign In



Sign in with your username and password

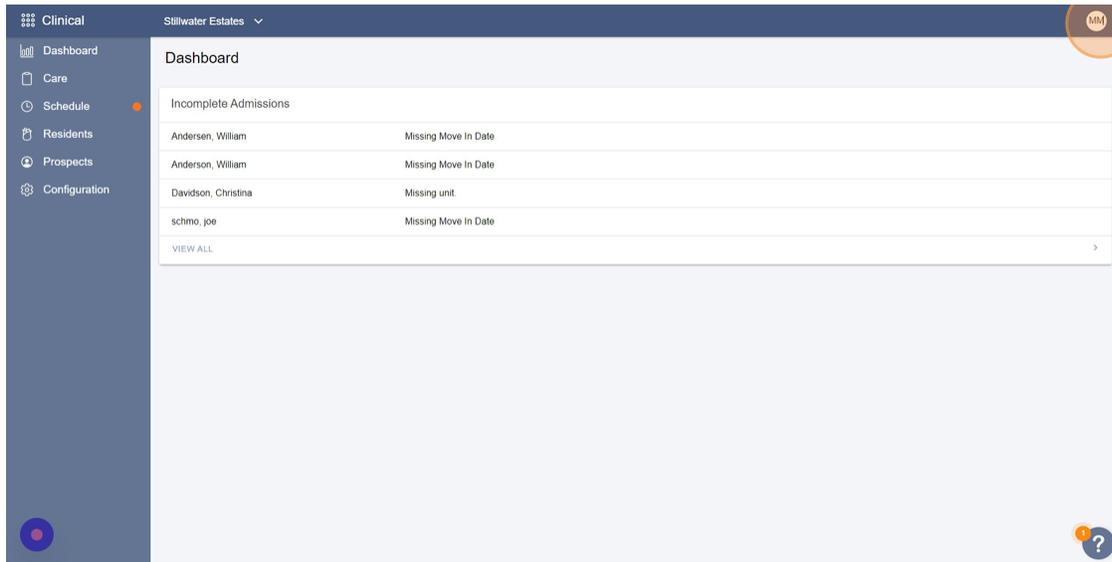
Username

Password

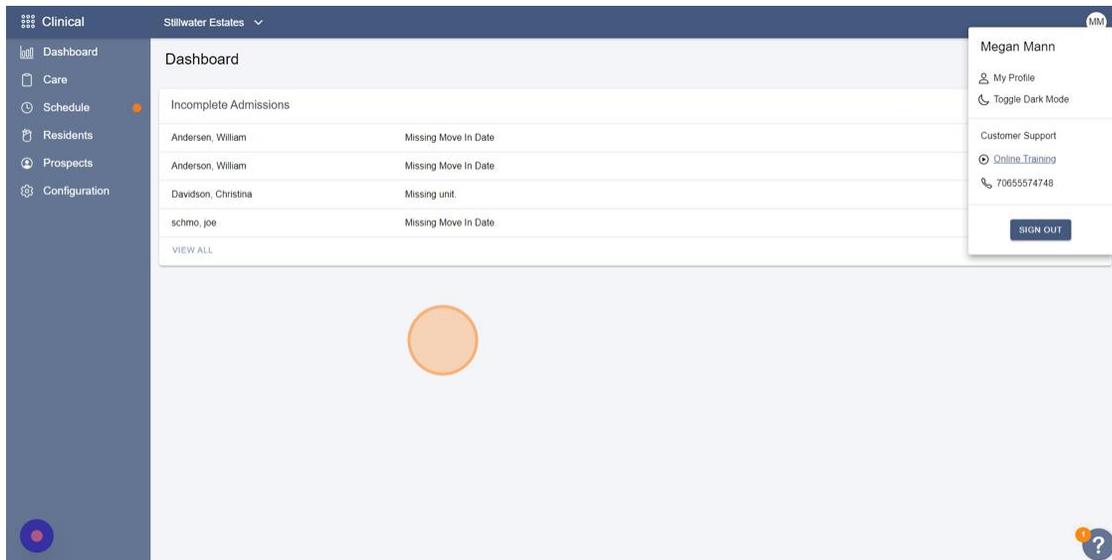
[Forgot your password?](#)

Sign in

4. Click "Initials" in upper right corner for the User Profile. This is also where you will log out.



5. Click Outside the Profile to close



6. Dashboard will show all Clinical Related widgets. Click "View All" for more.

The screenshot shows the 'Clinical' dashboard for 'Stillwater Estates'. The left sidebar contains navigation options: Dashboard, Care, Schedule, Residents, Prospects, and Configuration. The main content area is titled 'Dashboard' and features a section for 'Incomplete Admissions'. This section contains a table with the following data:

Incomplete Admissions	
Andersen, William	Missing Move In Date
Anderson, William	Missing Move In Date
Davidson, Christina	Missing unit.
schmo, joe	Missing Move In Date

An orange circle highlights the 'VIEW ALL' button located below the 'schmo, joe' row.

7. Use the back to return to Clinical Dashboards

This screenshot is similar to the previous one, but with a back arrow icon highlighted by an orange circle in the top right corner of the main content area, next to the 'Dashboard' title. The table of 'Incomplete Admissions' is also visible.

8. Click "Residents"

Clinical Stillwater Estates

Dashboard

Care

Schedule

Residents

Prospects

Configuration

Dashboard

Incomplete Admissions

Andersen, William	Missing Move In Date
Anderson, William	Missing Move In Date
Davidson, Christina	Missing unit.
schmo, joe	Missing Move In Date

[VIEW ALL](#)

9. Click "Residents" The number will show count for the filters applied.

Clinical Stillwater Estates

Dashboard

Care

Schedule

Residents 24

Prospects

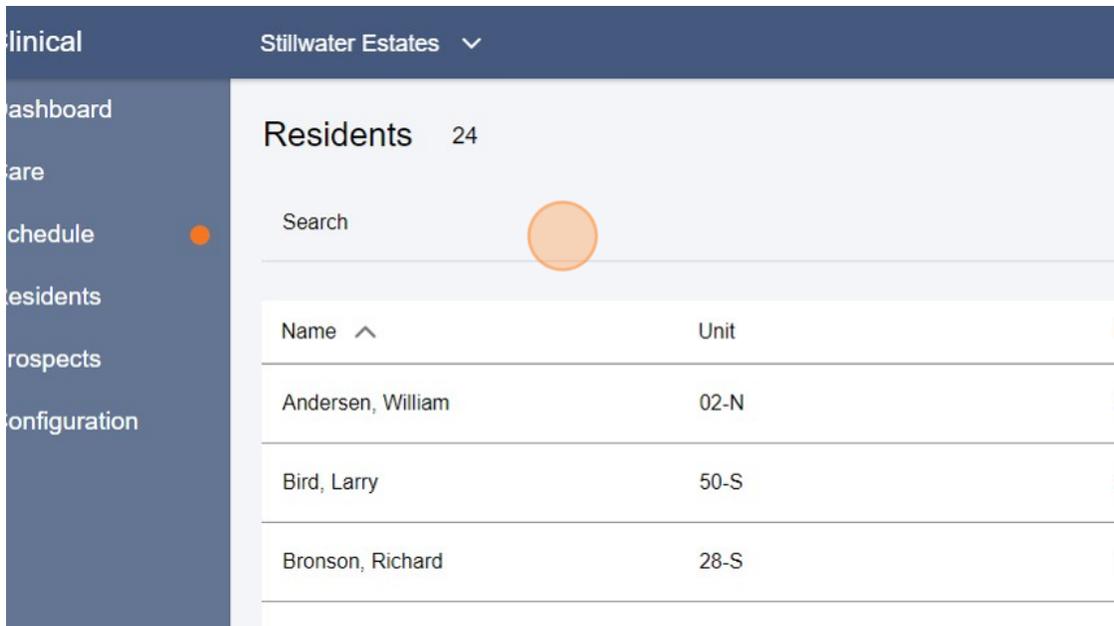
Configuration

Residents

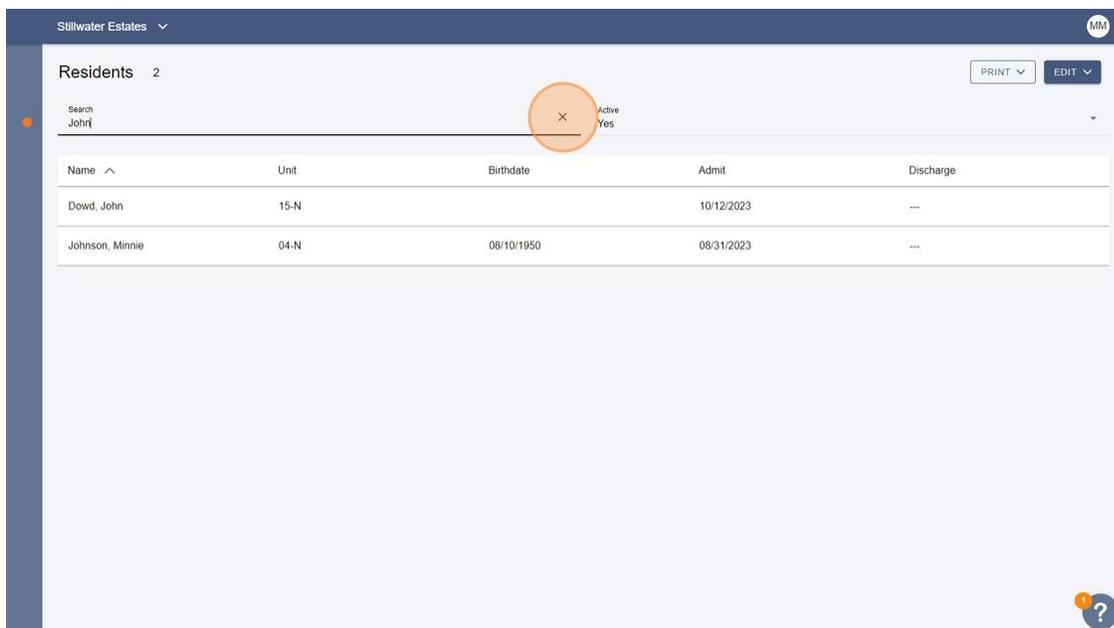
Search

Name ^	Unit
Andersen, William	02-N
Bird, Larry	50-S
Bronson, Richard	28-S

10. Use the search to filter for residents.



11. Use the X to remove the resident filter



12. Click "PRINT" Current document(s) available display. Additional resident documents will be added.

MM

PRINT EDIT

Active
Yes

Admit	Discharge
07/15/2023	---
07/31/2023	---
10/20/2023	---

13. Click "Facesheet" to select.

MM

PRINT EDIT

Facesheet

Active
Yes

Admit	Discharge
07/15/2023	---
07/31/2023	---
10/20/2023	---

14. Select the Residents to print for. Select all that should be included.

Care
Schedule
Residents
Prospects
Configuration

Residents 24

Search

Name ^	Unit
Andersen, William	02-N
Bird, Larry	50-S
Bronson, Richard	28-S
Davidson, Christina	07-N

15. Click "PRINT (1)"

MM

Select 1 or more residents from the list to print Face Sheets

CANCEL PRINT (1)

Active
Yes

Admit	Discharge
07/15/2023	---
07/31/2023	---
10/20/2023	---

16. A print preview of the Facesheet will display for Saving or Printing.

Service Agreement

Stillwater Estates
2654 Main Ave
Stillwater , MN 55802



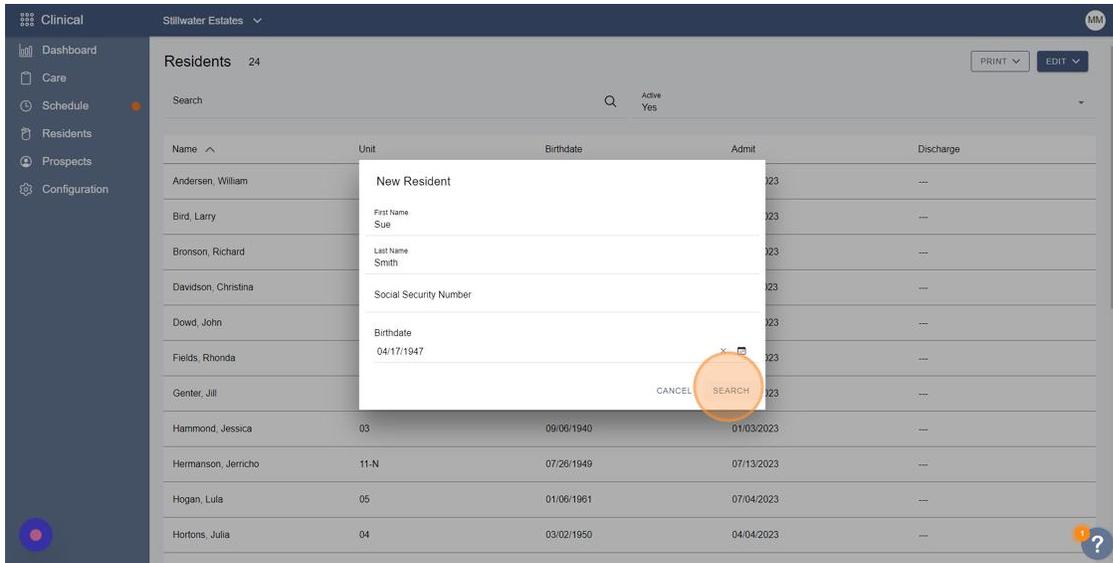
William Andersen
Unit 02-N
Effective 10/27/2023 9:12 AM

Code Status	Resuscitate
Date of Birth	07/13/1955
Allergies	Penicillin
Diagnoses	Dementia in other diseases classified elsewhere, mild, with other behavioral disturbance
Diet	
Weight	
Emergency Contacts	
Evacuation Status	
Hospital Preference	
Prepared By	Mellie Thompson

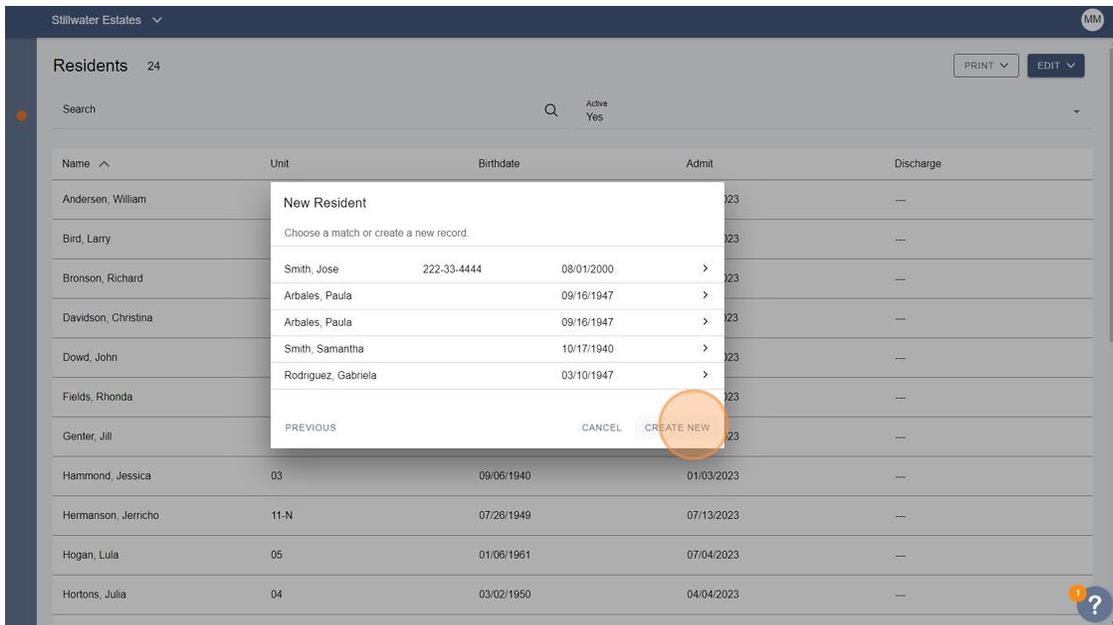
17. To create a new resident record, click "Add Resident"

Admit	Discharge
07/15/2023	---
07/31/2023	---
10/20/2023	---

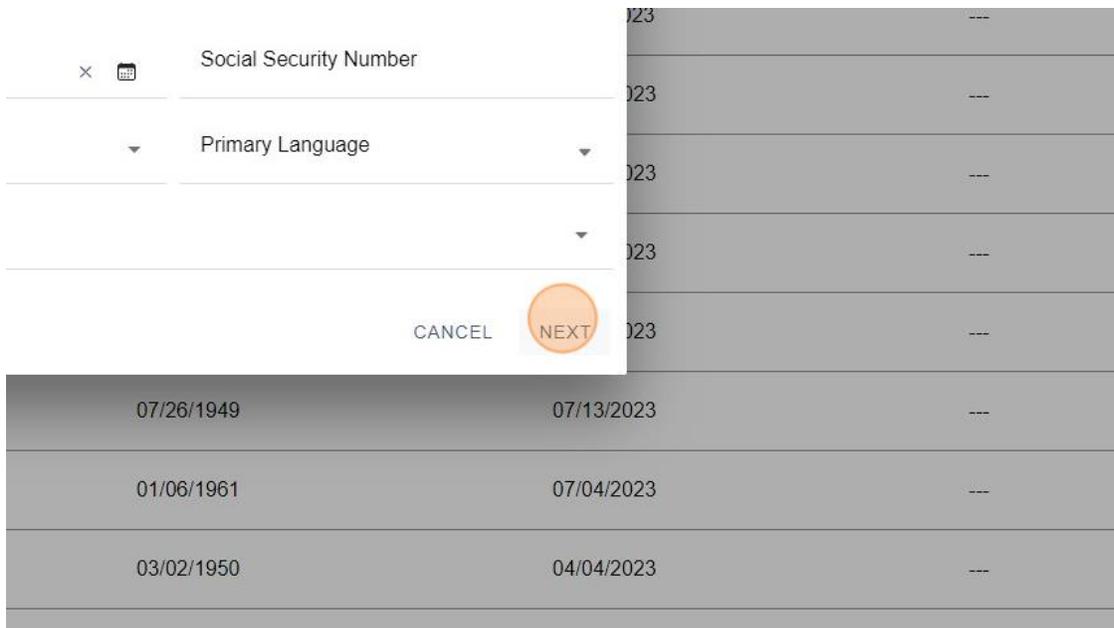
18. Type First Name, Last Name, and DOB. Click "SEARCH"
DOB or SSN are required but DOB is preferred for EMAR.



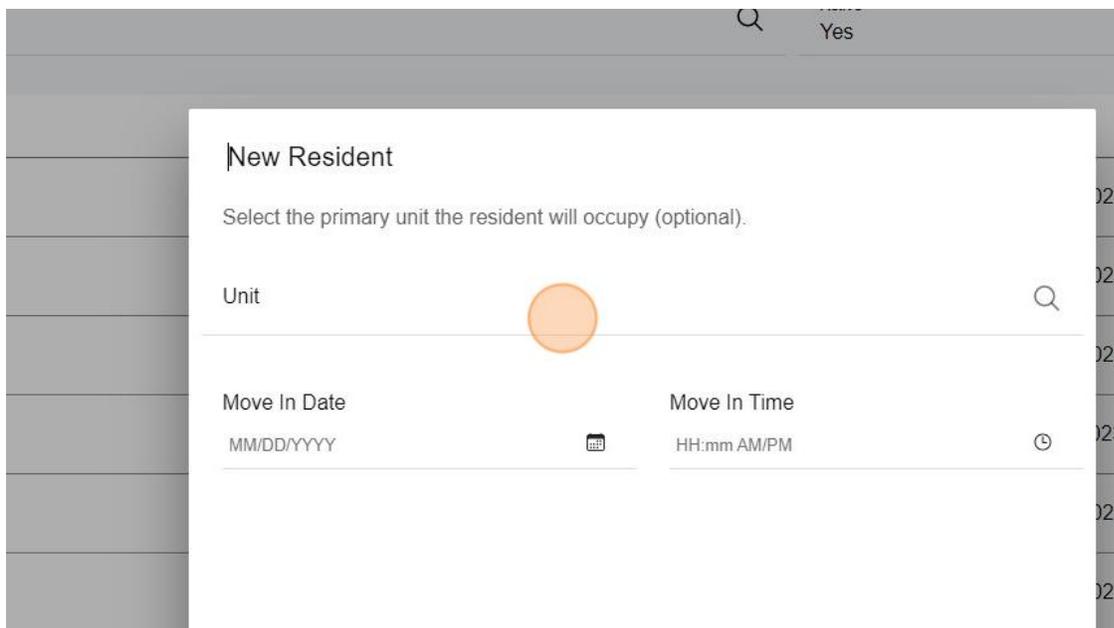
19. A search will complete and find matching residents. This is a loose search on each field. Click "CREATE NEW" if matching resident is not found.



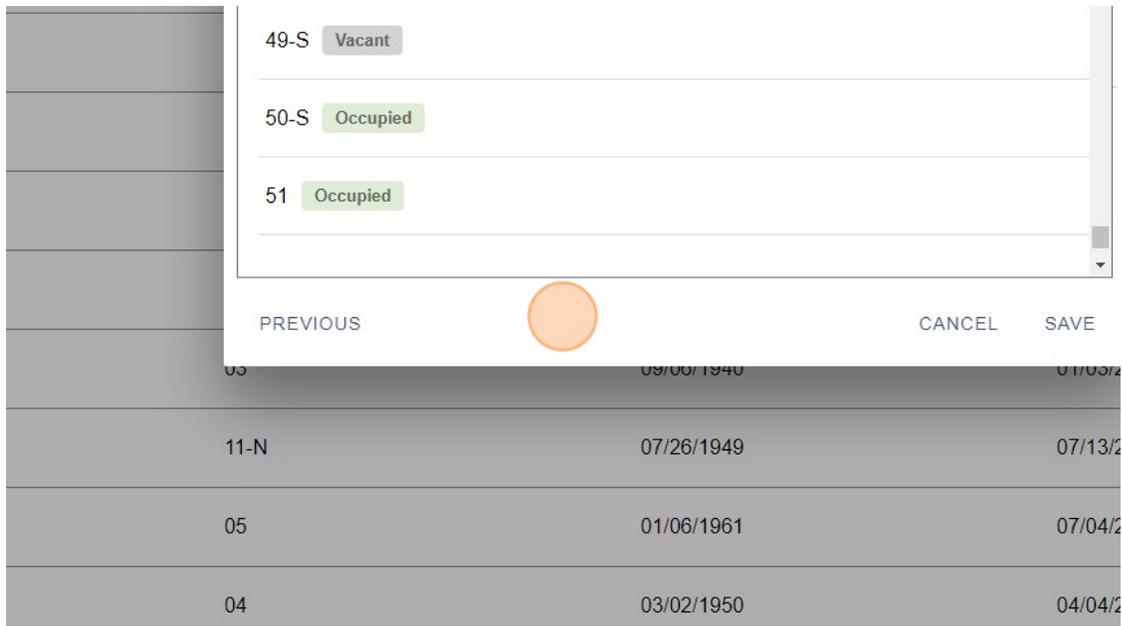
20. The New Resident modal will display additional fields for entry. Sex is a required field.



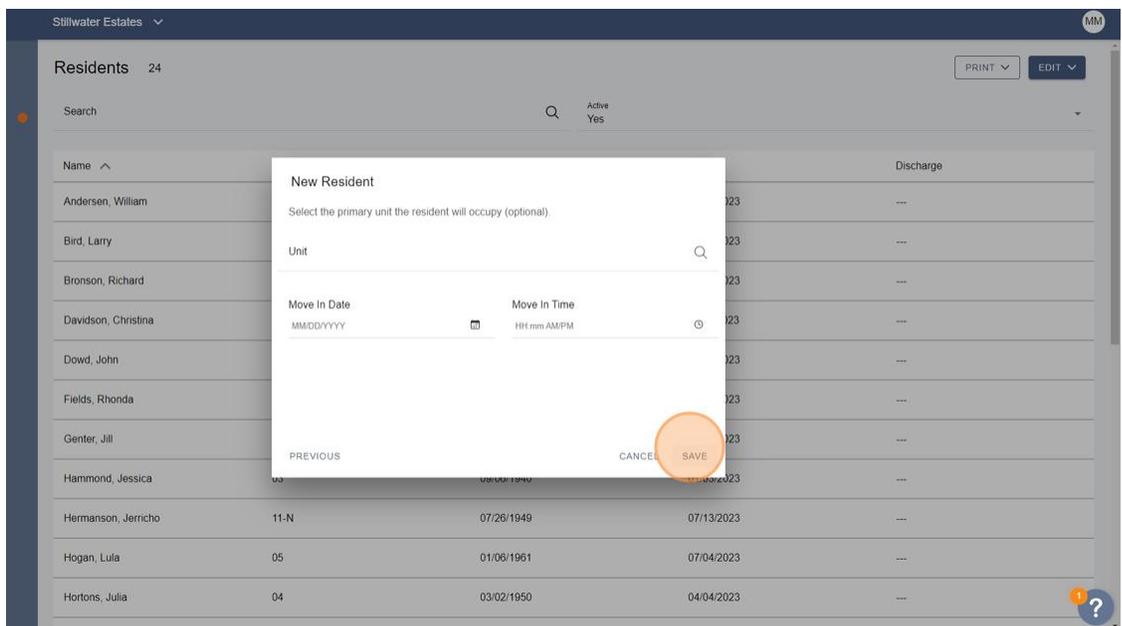
23. Unit details will display. Adding a unit is optional here.



24. Clicking unit will show all units with vacant or occupied status.



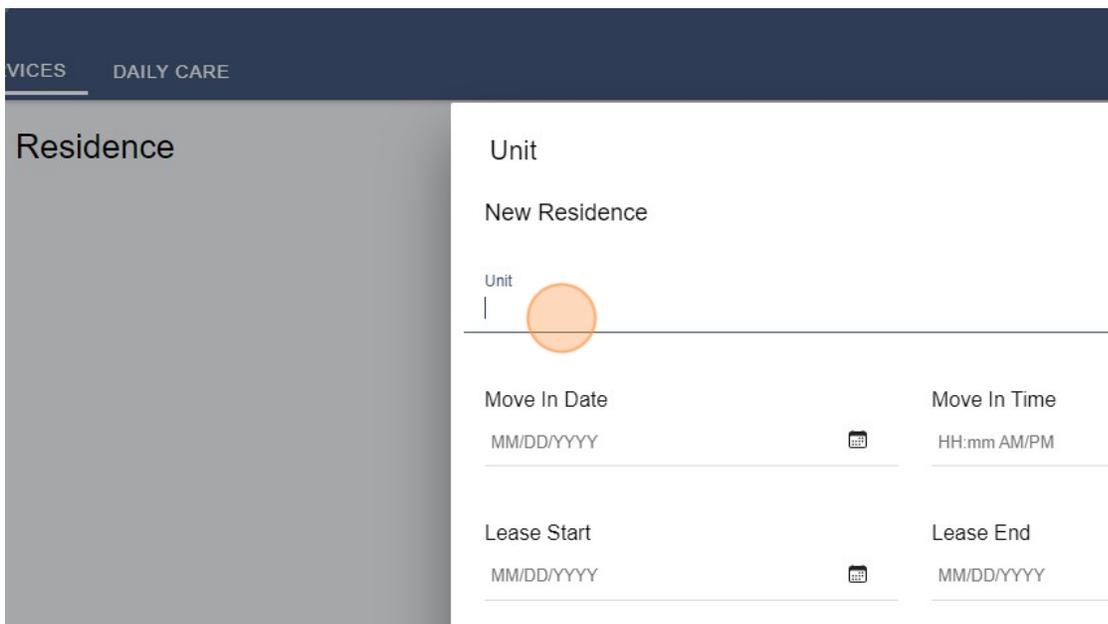
25. Click "SAVE"



26. The Resident record will open to the Services Tab - Residence for review of unit detail or adding a unit. Click "NEW" to add a unit.



27. Click "Unit"



28. All units display with vacant or occupied status. Click a unit to select.

Residence

Unit

New Residence

Unit

|

45-S Vacant

46-S Vacant

47-S Vacant

48-S Vacant

29. Click the calendar to add a Move In Date.

Move in Date is their physical presence. Lease Start is the billing bookend.

Unit

New Residence

Unit

46-S

| X

Move In Date

MM/DD/YYYY



Move In Time

HH:mm AM/PM



Lease Start

MM/DD/YYYY

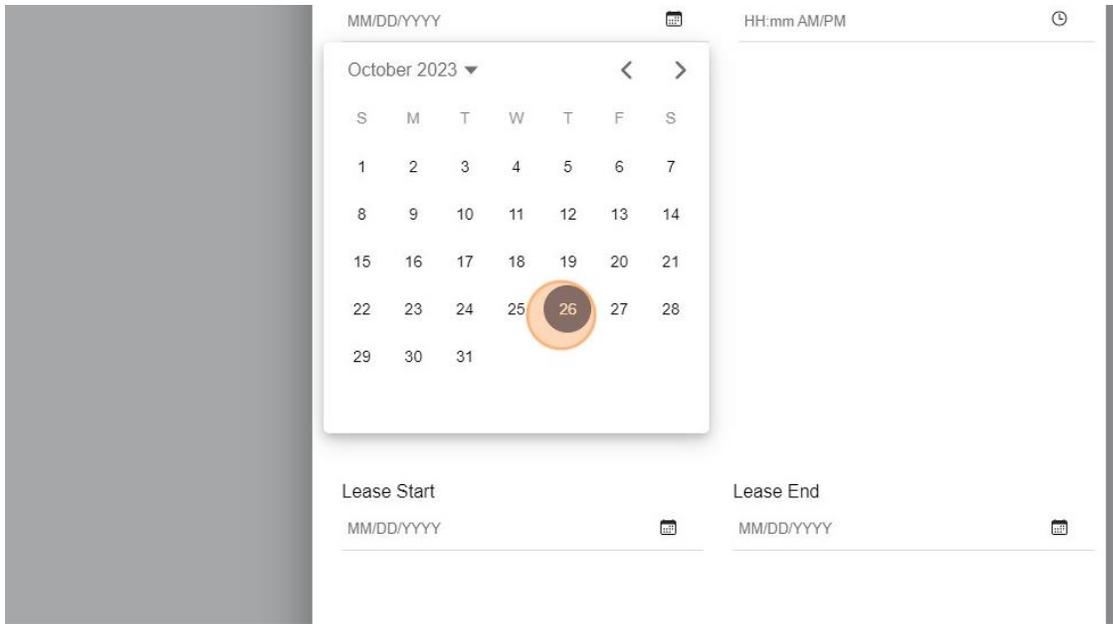


Lease End

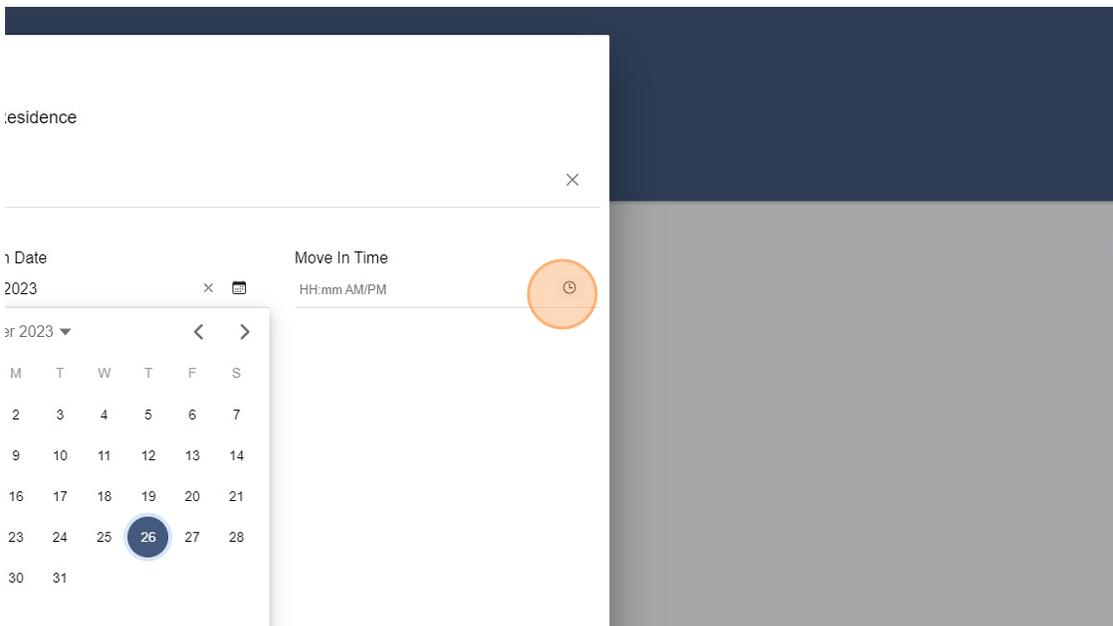
MM/DD/YYYY



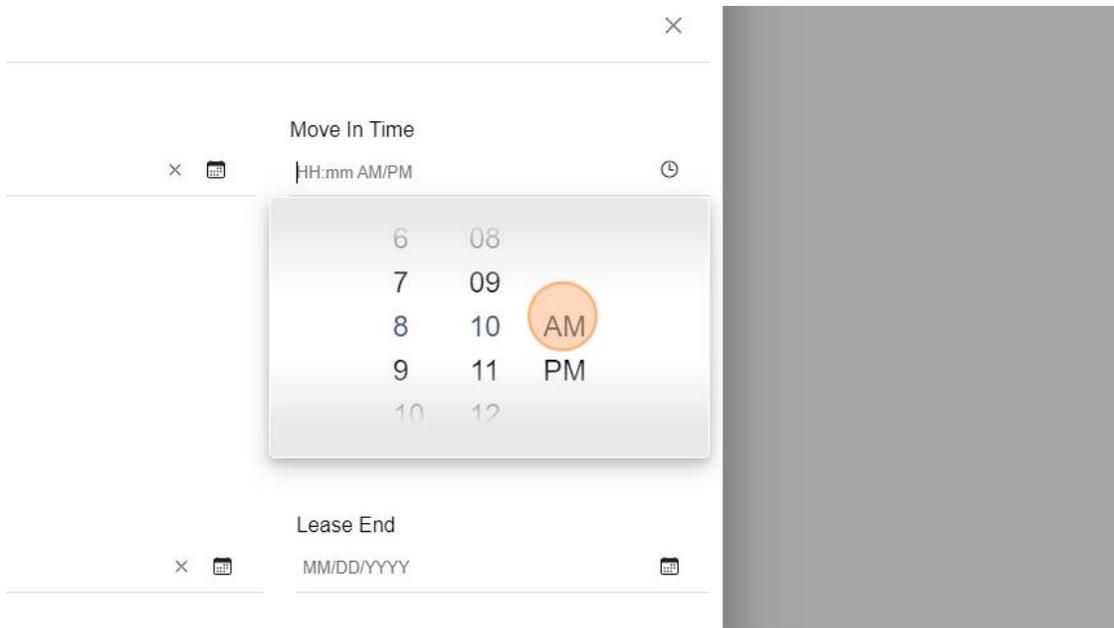
30. Use the calendar to select the date or type the full date.



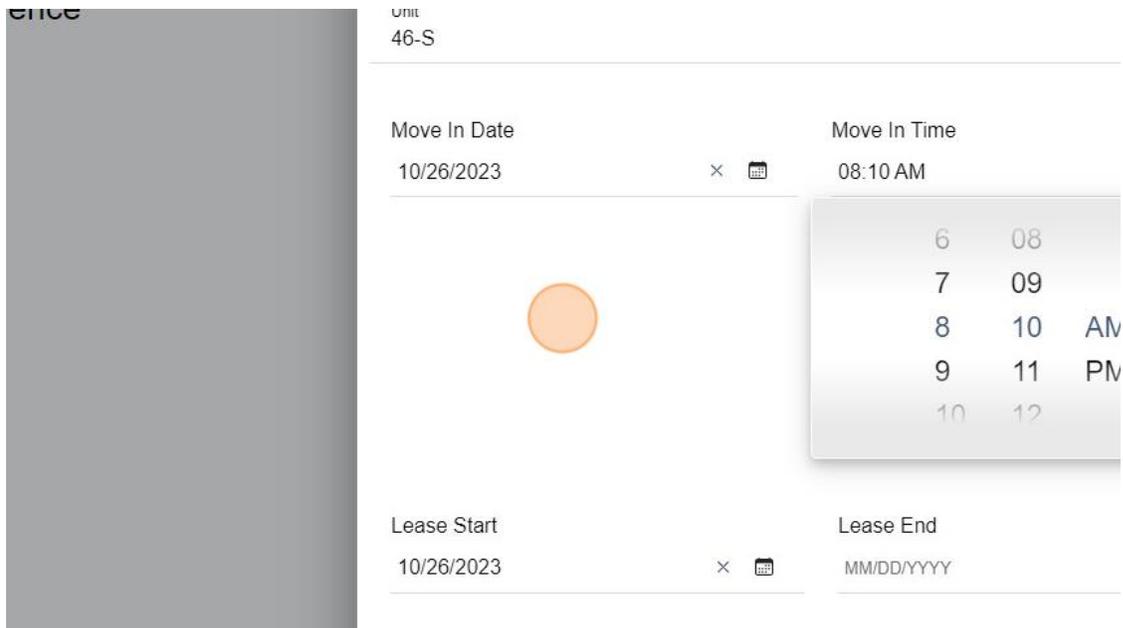
31. Click the clock to add a time.



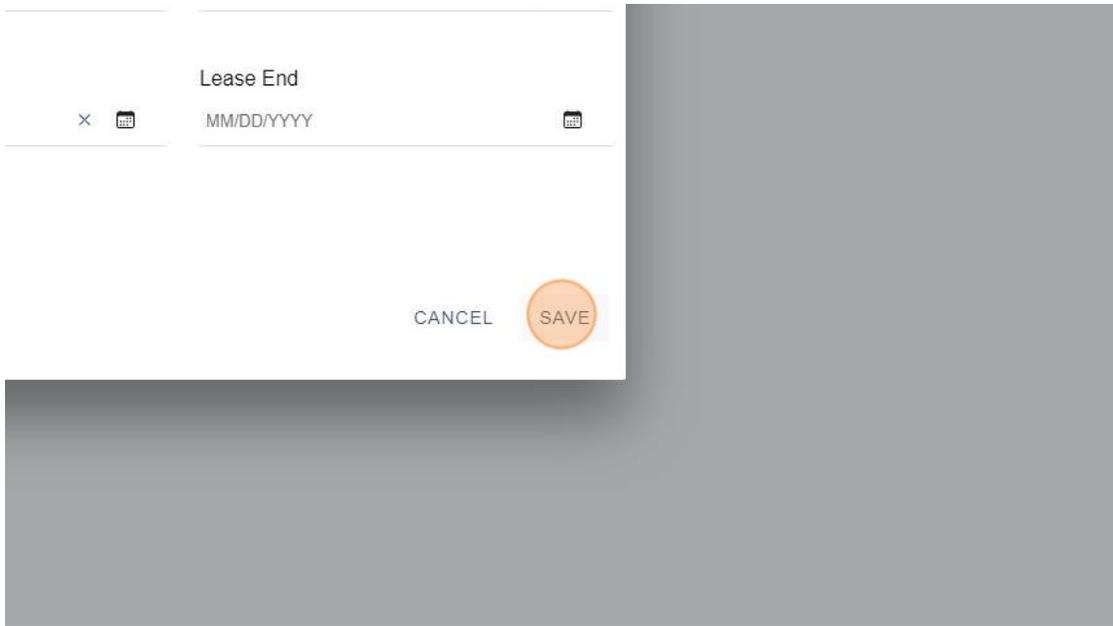
32. The current time will default. Click to select.



33. To Close the Move In Time, click outside the selection.



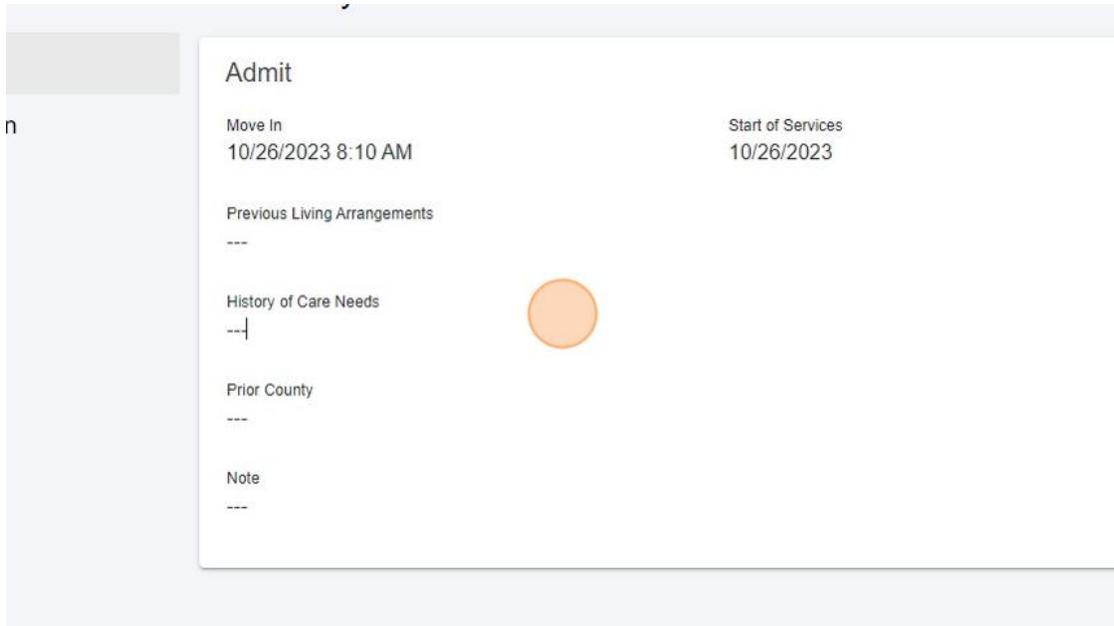
34. Click "SAVE"



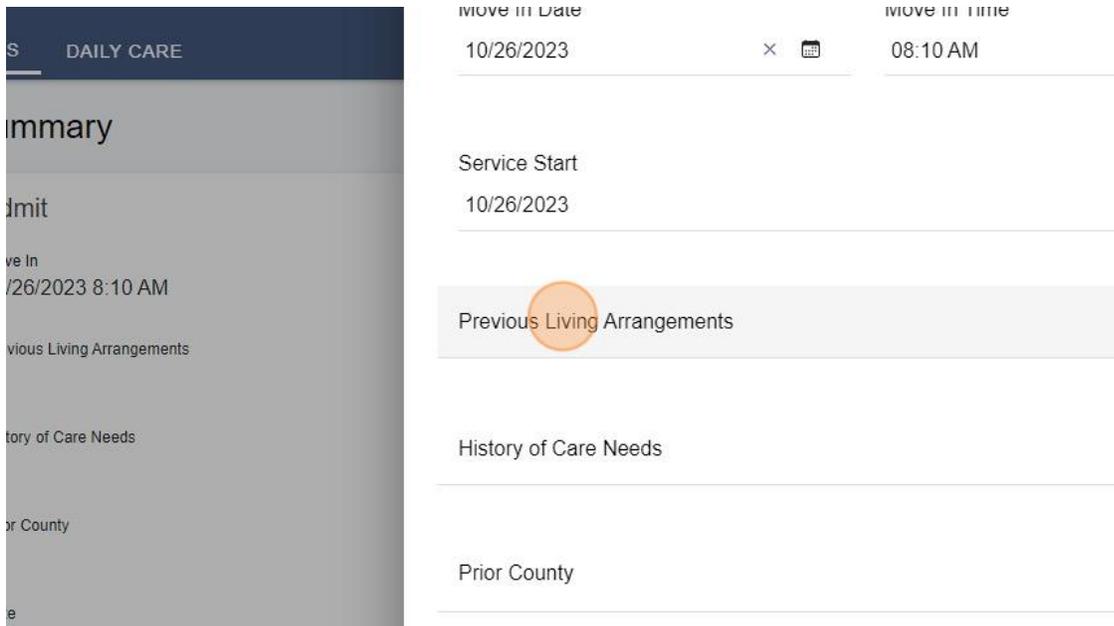
35. The Residence detail page will show completed detail. Click "Summary"



36. Admit detail will display. Click to open the editable modal window.



37. Click "Previous Living Arrangements"



38. Select from the list.

10/26/2023 8:10 AM

Previous Living Arrangements

History of Care Needs

Prior County

Note

Previous Living Arrangements

- Adult Day Care
- Assisted Living
- Hospital
- Independent Living
- Lives Alone
- Lives Alone/Home Health
- Lives with Family
- Lives with Family/Home Health
- Lives with Spouse

39. Click "History of Care Needs"

M
ments

Service Start
10/26/2023

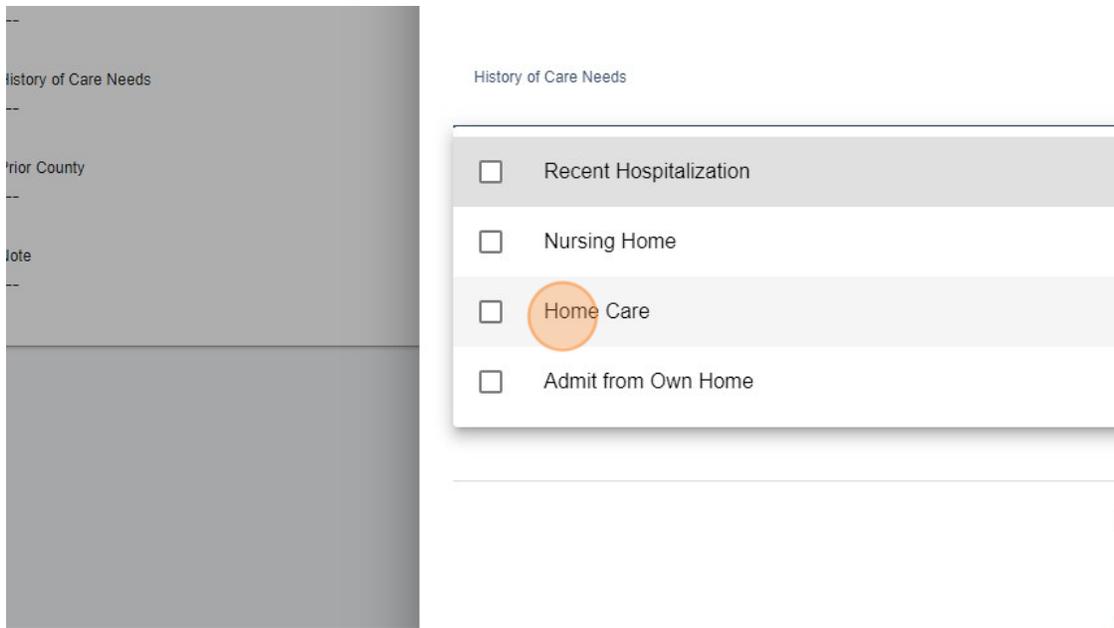
Previous Living Arrangements
Independent Living

History of Care Needs

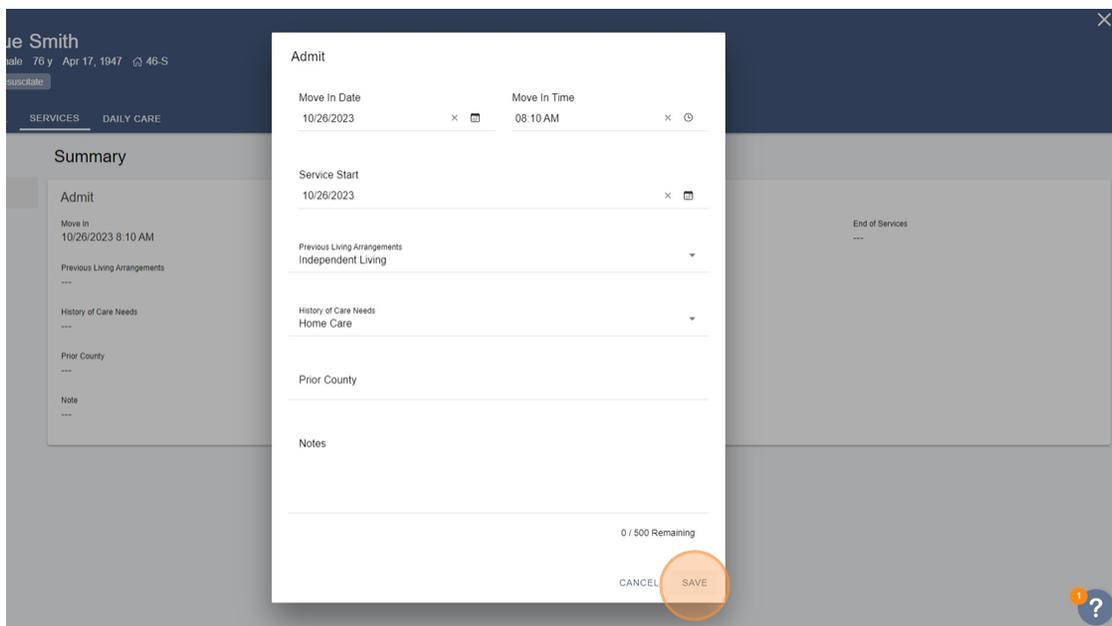
Prior County

Notes

40. Select all that apply.



41. Click "SAVE" to close the Admit window.



42. Click "PROFILE" This is the general chart which contains demographic details.

Sue Smith
Female 76 y Apr 17, 1947 46-S
Resuscitate

PROFILE MEDICAL SERVICES DAILY CARE

Menu **Summary**

Summary
Service Plan
Delivery
Residence

Admit

Move In 10/26/2023 8:10 AM Start of Services 10/26/2023

Previous Living Arrangements ---

History of Care Needs

43. Click any card to open the editable detail.

Sue Smith
Female 76 y Apr 17, 1947 46-S
Resuscitate

PROFILE MEDICAL SERVICES DAILY CARE

Menu **Demographics**

Demographics
Contacts
Accommodations
Agencies
Insurance

Identity

Legal Name Sue Smith Preferred Name ---
Maiden Name --- Preferred pronouns ---
Birthdate 04/17/1947 Race ---
Sex Female Primary Language ---
Gender identity ---

Resident Contact

Previous Address --- Home Phone ---
Email --- Other Phone ---

Appearance

Photo --- Hair Color ---
Glasses --- Eye Color ---

Partner

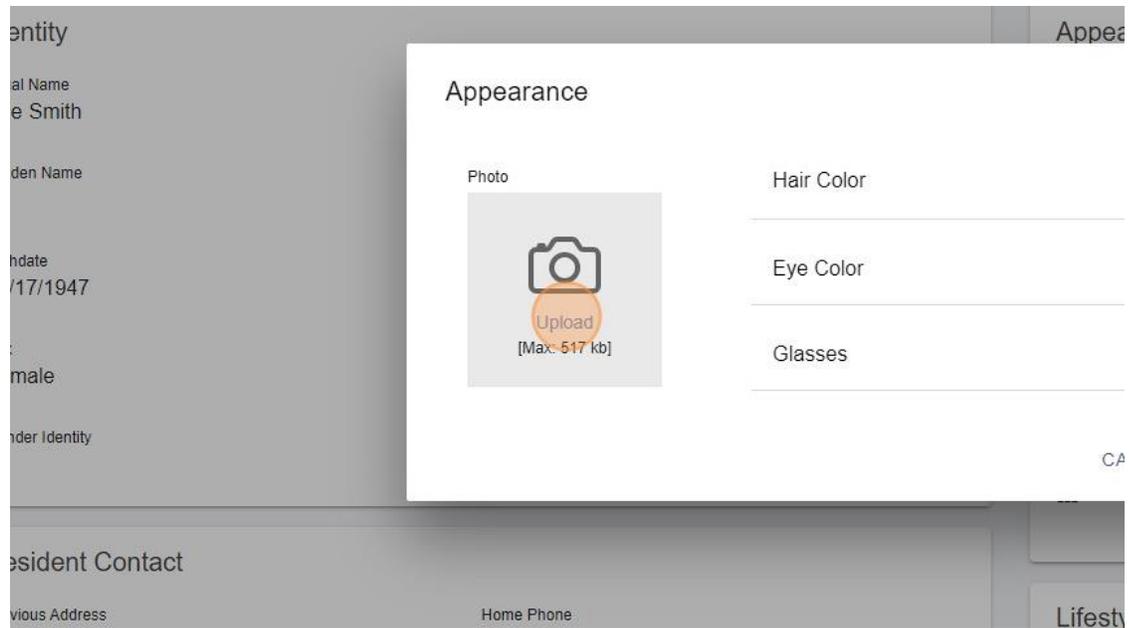
Marital Status --- Anniversary ---
Partner's Name --- Years Together ---

Lifestyle

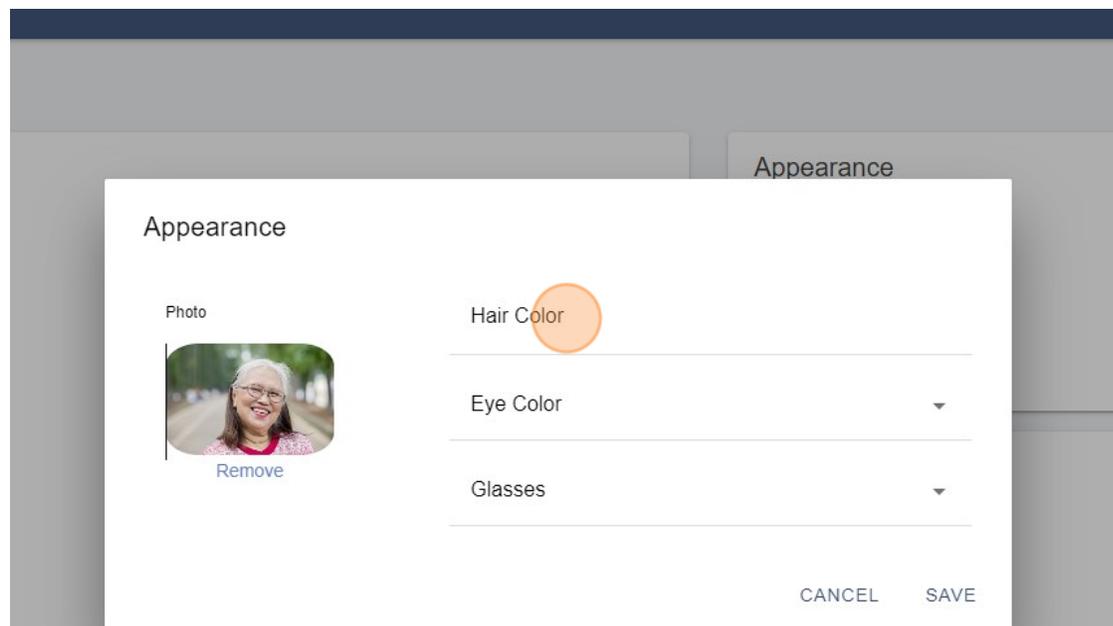
Previous Occupation --- Religion ---
Birthplace --- Veteran ---

Medical Identifiers

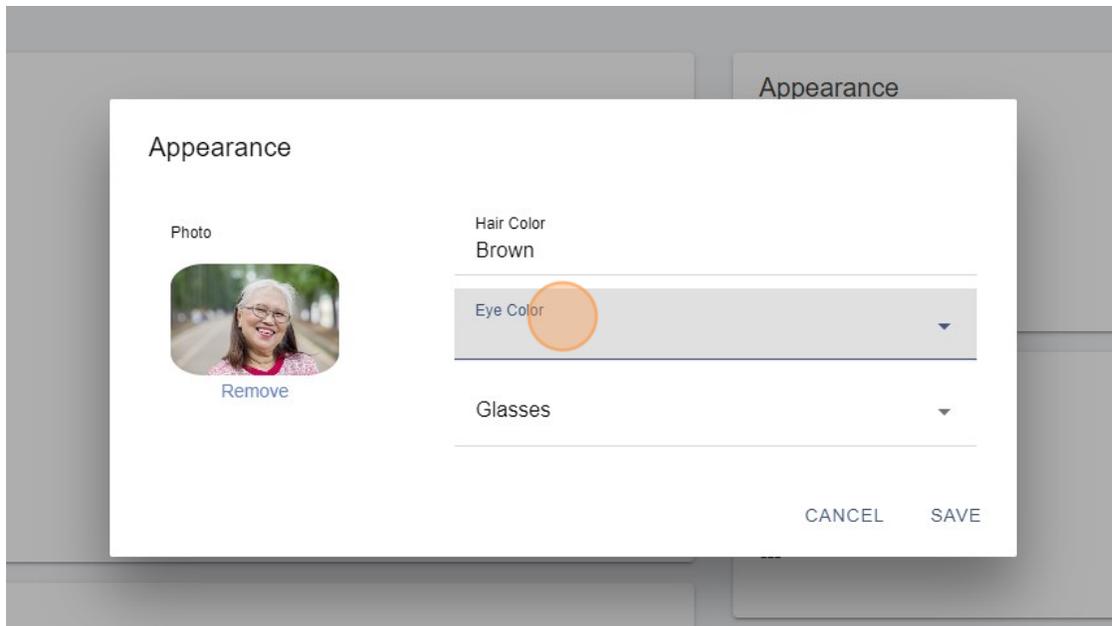
44. The Appearance card contains the resident photo. Click "Upload" or Drag and Drop a photo. The Upload on a mobile device will include option to open the camera to take a photo on the spot.



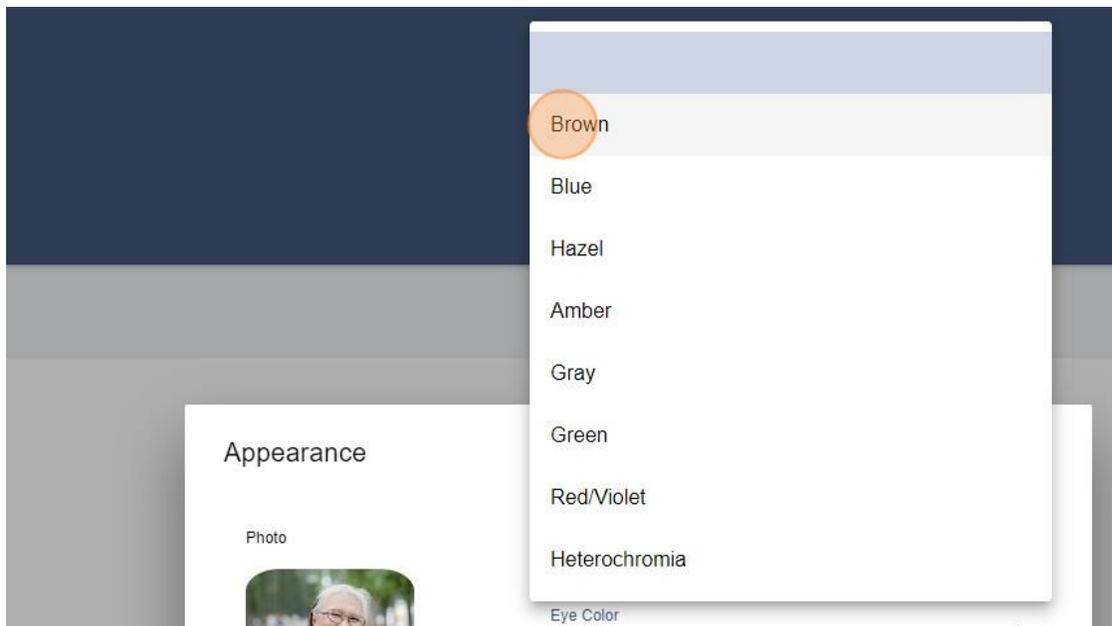
45. Click "Hair Color" Free text color.



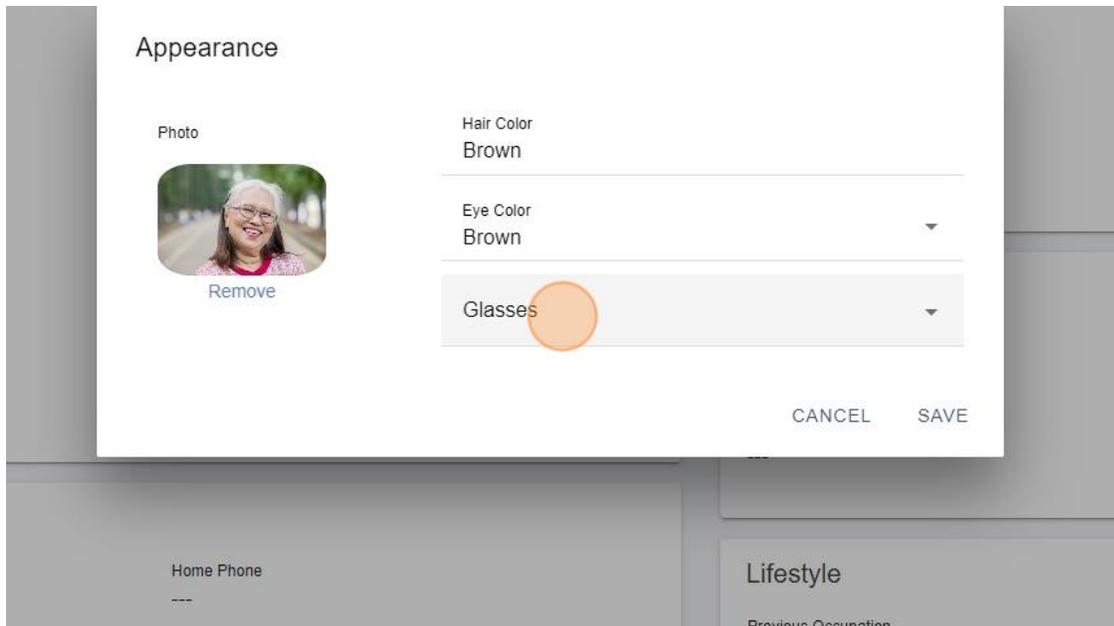
46. Click "Eye Color"



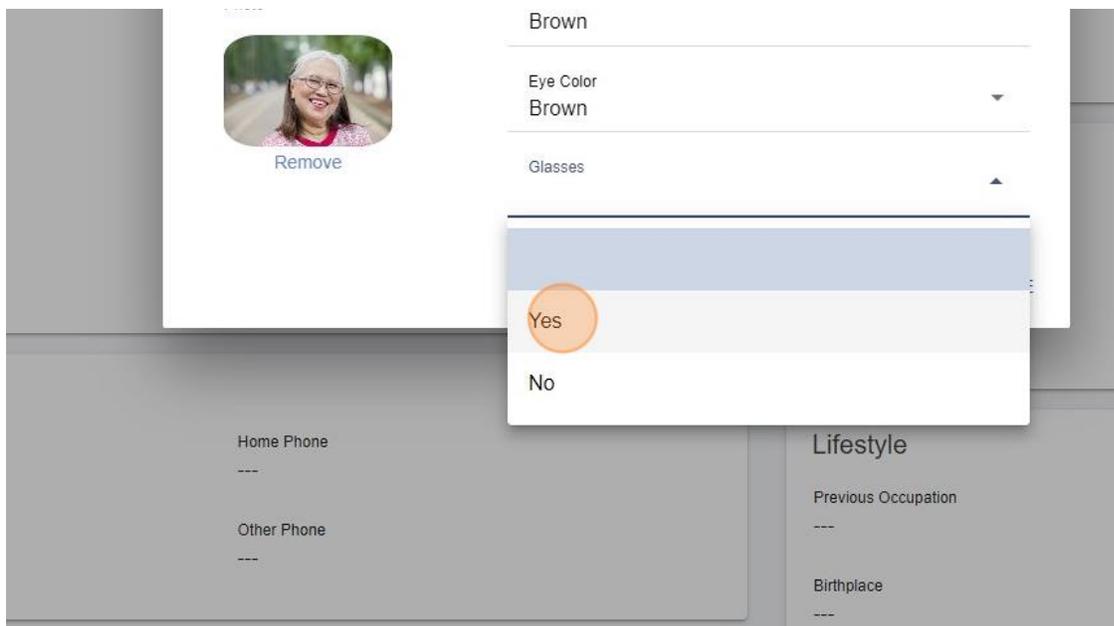
47. Select from the list.



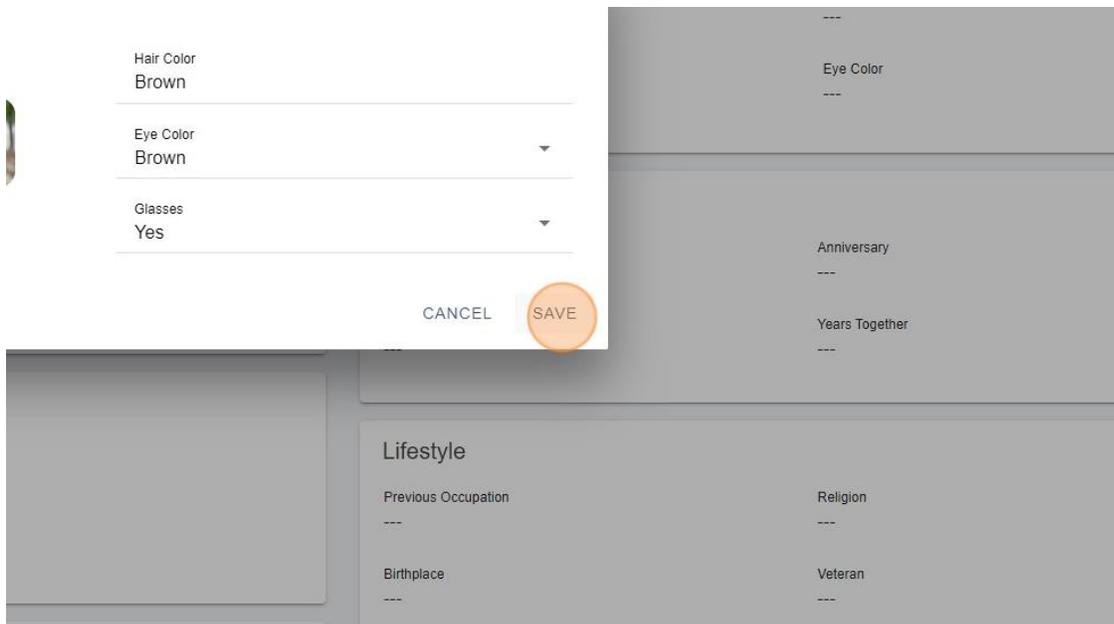
48. Click "Glasses"



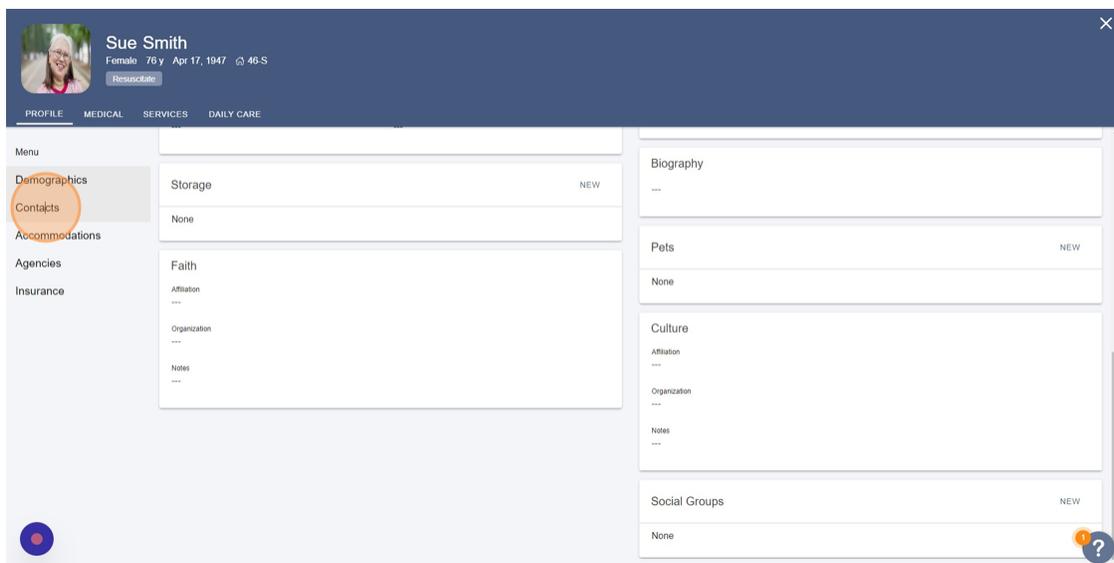
49. Select Yes or No



50. Click "SAVE" The card will display the updated data.



51. Click "Contacts"



52. Click "NEW"

Sue Smith
Female 78 y Apr 17, 1947 46-S
Resuscitate

PROFILE MEDICAL SERVICES DAILY CARE

Menu
Demographics
Contacts
Accommodations
Agencies
Insurance

Contacts

NEW

53. Add First Name and Last Name

Contact

First Name

Last Name

Designations ▼

Relationship ▼

54. Click "Designations"

Contact

First Name
Sam

Last Name
Smith

Designations 

Relationship

Phone Type Phone Number

55. Select all that apply

- Durable Healthcare Power of Attorney (DHCP/A)
- Durable Power of Attorney for Finances (DFPOA)
- Guardian (G)
- Health Care Proxy (HCP)
- Mental Healthcare Power of Attorney (MHPOA)
- Nearest Relative (NR)
- Power of Attorney (POA) 
- Representative (R)
- Responsible Party / Bill to (RP)

56. Click outside the field to close.

- Durable Healthcare Power of Attorney (DHCP/A)
- Durable Power of Attorney for Finances (DFPOA)
- Guardian (G)
- Health Care Proxy (HCP)
- Mental Healthcare Power of Attorney (MHPOA)
- Nearest Relative (NR)
- Power of Attorney (POA)
- Representative (R)
- Responsible Party / Bill to (RP)

57. Click "Relationship"

Last Name
Smith

Designations
Power of Attorney (POA), Responsible Party / Bill to (RP)

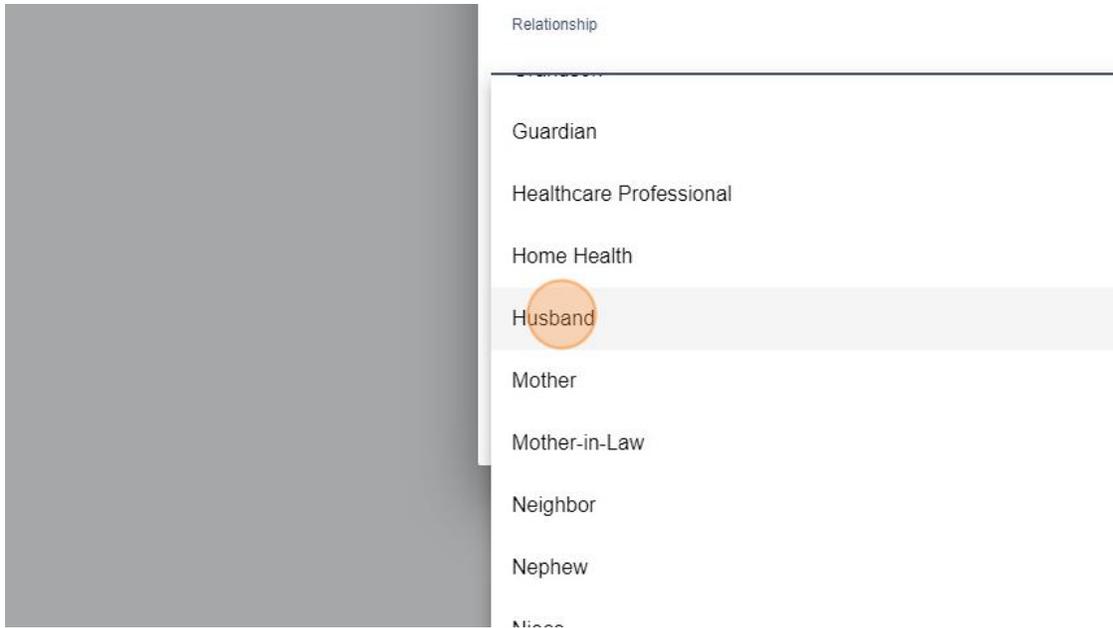
Relationship 

Phone Type ▼ Phone Number

Call Order
1

Emergency Contact

58. Choose from the list



59. Click "Phone Type"

A screenshot of a form with several fields. The 'Phone Type' field is highlighted with a light gray background and a small orange circle is placed over the dropdown arrow. The form includes the following fields: 'SMITH' (text), 'Designations' (dropdown menu with 'Power of Attorney (POA), Responsible Party / Bill to (RP)' selected), 'Relationship' (dropdown menu with 'Husband' selected), 'Phone Type' (dropdown menu), 'Phone Number' (text input), 'Call Order' (dropdown menu with '1' selected), and an 'Emergency Contact' toggle switch. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

60. Click "Phone Number" and type using the tab key

Summary

Designations
Power of Attorney (POA), Responsible Party / Bill to (RP) ▼

Relationship
Husband ▼

Phone Type
Mobile ▼ **Phone Number**

Call Order
1 ▼

Emergency Contact

CANCEL SAVE

61. Toggle Emergency Contact

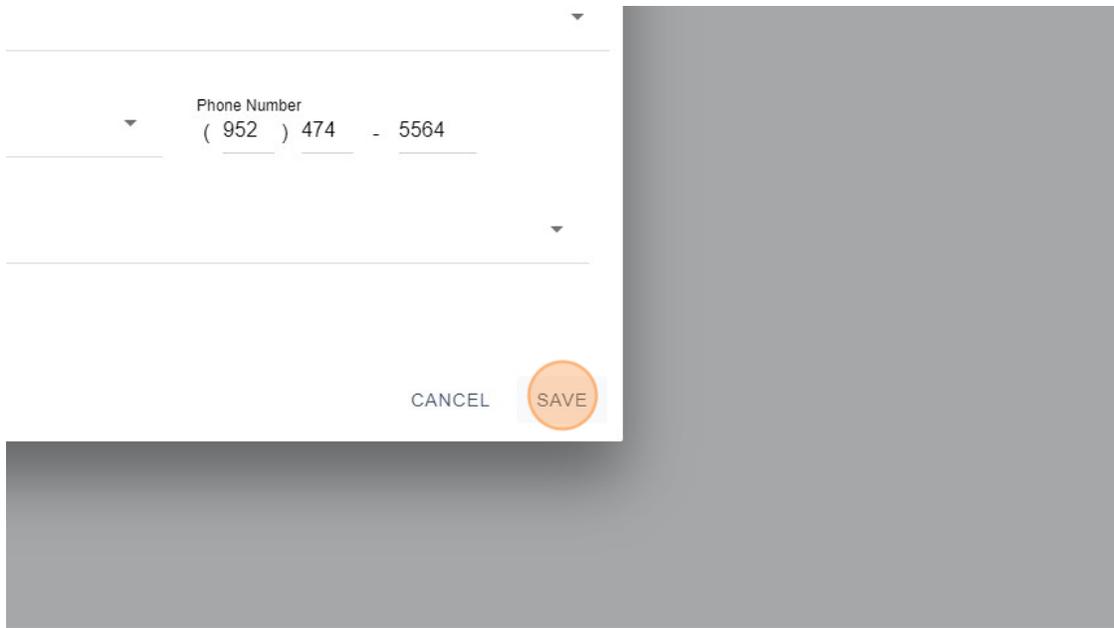
Relationship
Husband

Phone Type
Mobile ▼ Phone Number
(952) 47

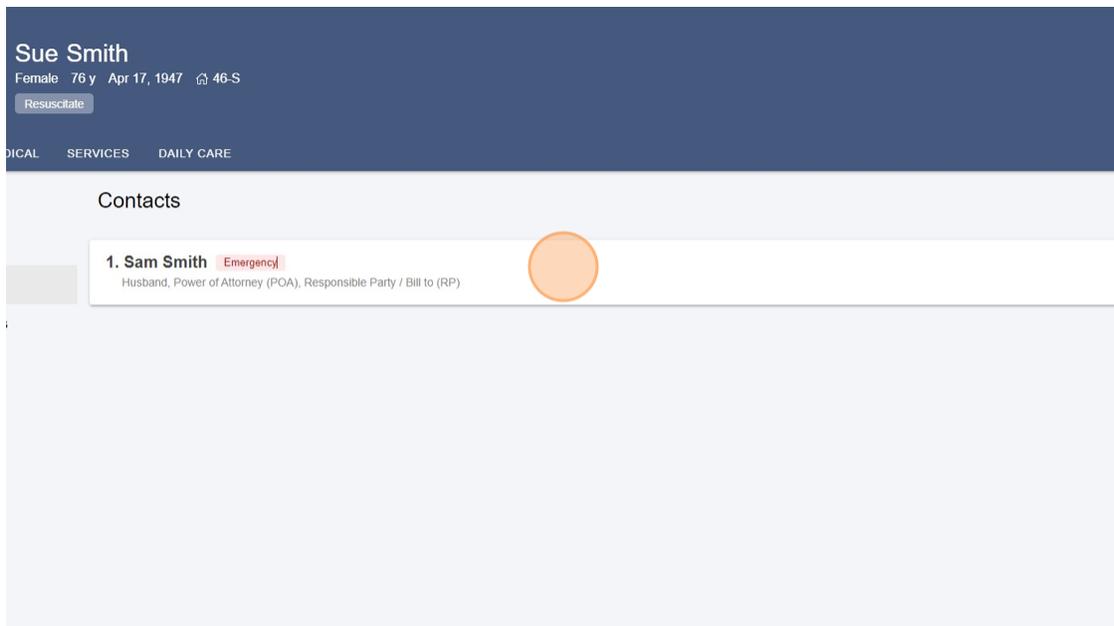
Call Order
1

Emergency Contact

62. Click "SAVE"



63. Click the contact card to open



64. Click into any card to add detail

Sue Smith
Female 78 y Apr 17, 1947 46-S
Resuscitate

PROFILE MEDICAL SERVICES DAILY CARE

Menu
Demographics
Contacts
Accommodations
Agencies
Insurance

← Contacts
Sam Smith

Profile	Call Order 1
Relationship Husband	Emergency Contact Yes
Designations Power of Attorney (POA) Responsible Party / Bill to (RP)	

Address

Notes

Phone Numbers **NEW**

MOBILE	(952) 474-5564	
--------	----------------	---

Email **NEW**

None



65. Click the phone icon to direct dial.

Phone Numbers **NEW**

MOBILE	(952) 474-5564	
--------	----------------	---

Email **NEW**

None

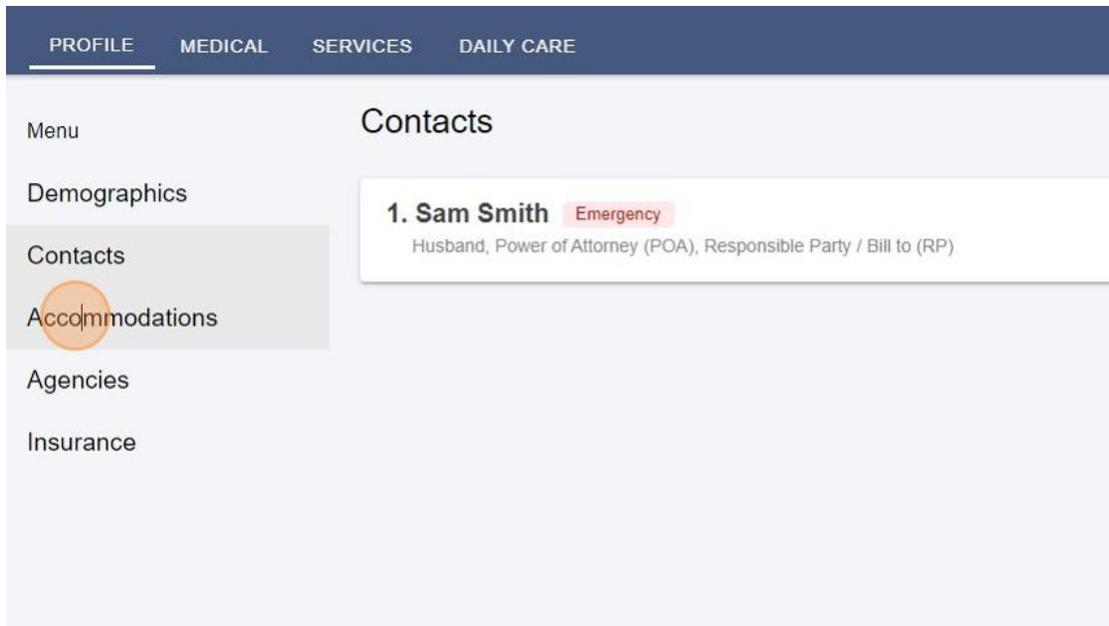
66. Click "NEW" to add Email.

Phone Numbers		NEW
MOBILE	(952) 474-5564	
Email		NEW
None		

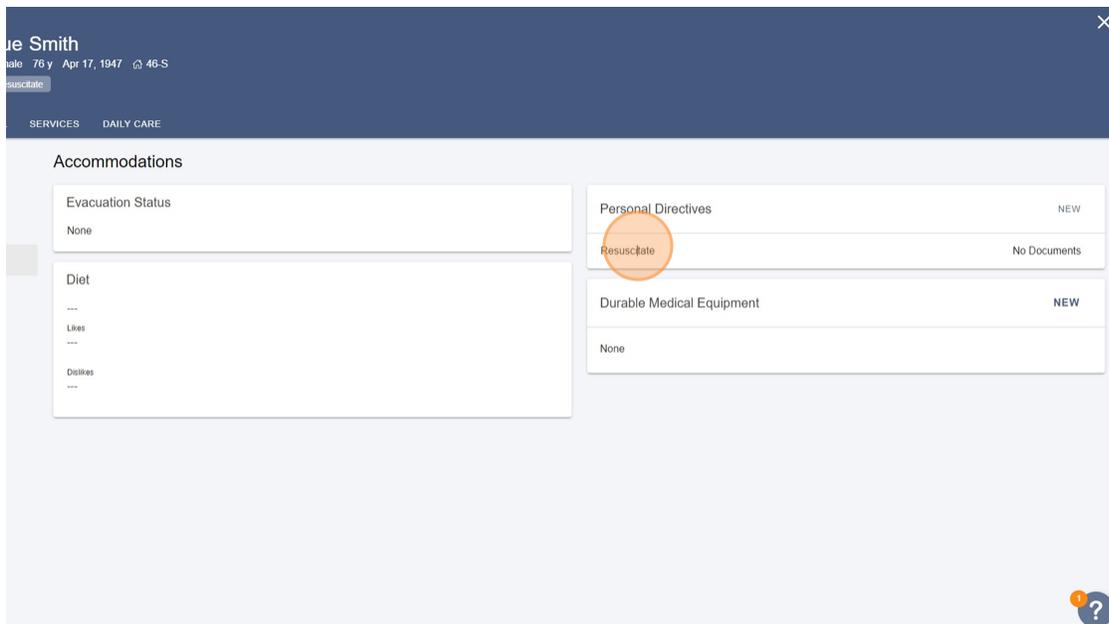
67. Click the mail icon to send an email.

MOBILE	(952) 474-5564	
Email		NEW
PERSONAL	sam@you.com	

68. Click "Accommodations"



69. Personal Directives is where the Code Status is found. Click the card to open



70. Code Status displays. Click "Status". Each resident will default to Resuscitate

Code Status

Status
Resuscitate

Document

CANCEL SAVE

71. Click to change.

Code Status

Status
Resuscitate

Resuscitate

Do Not Resuscitate

CANCEL SAVE

72. Click to add supporting document(s). File explorer will open to select the document.

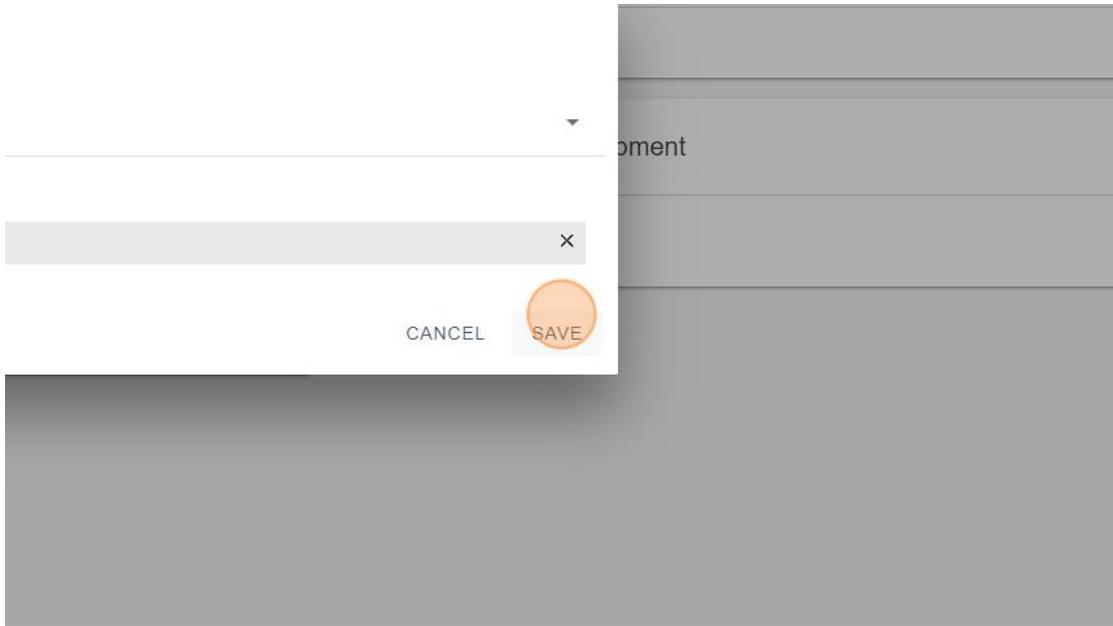
Code Status

Status
Do Not Resuscitate

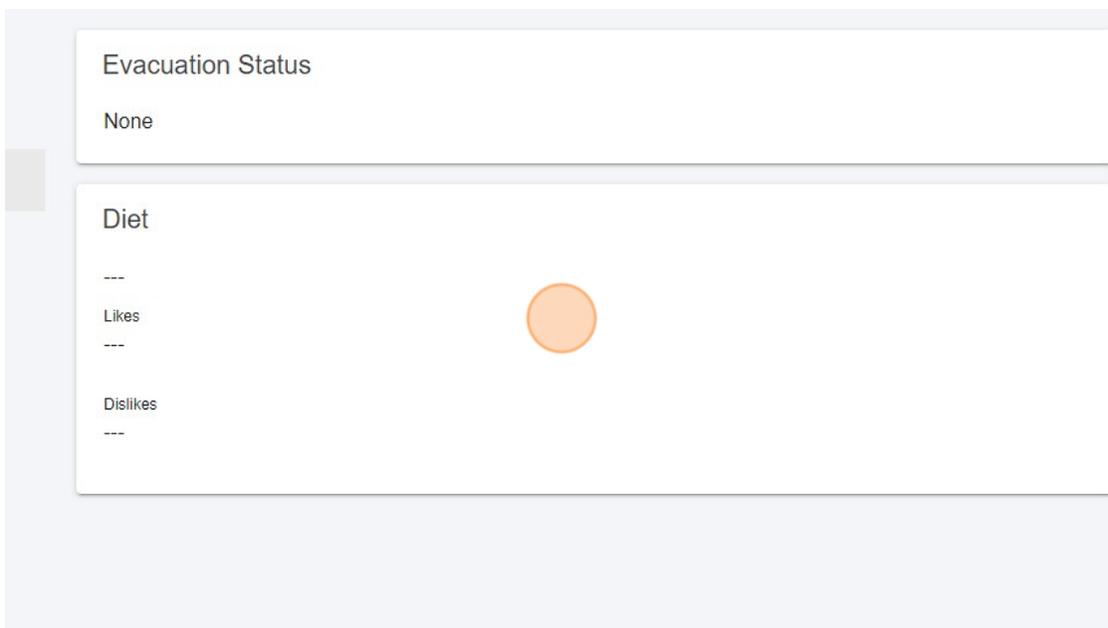
Document

CANCEL SAVE

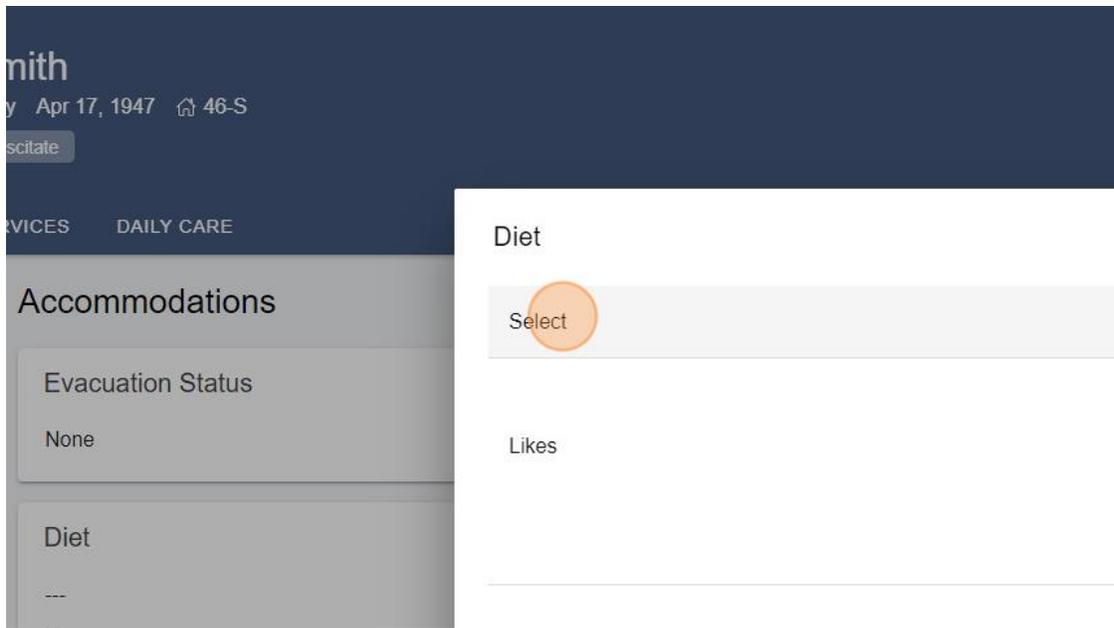
73. Click "SAVE"



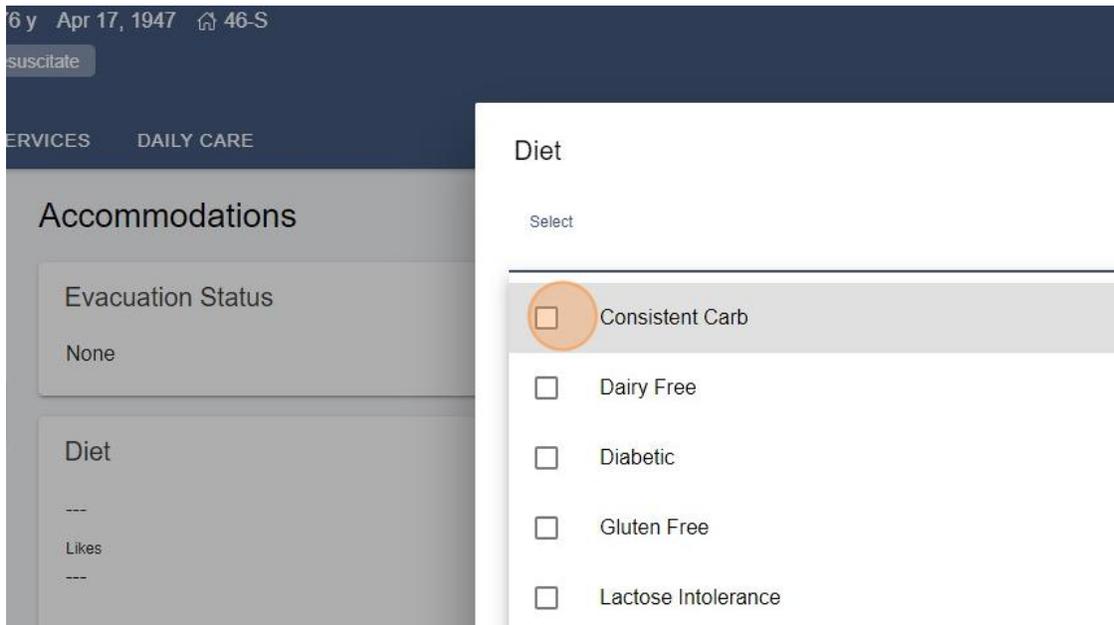
74. The Diet card is also found in Accommodations. Click the card to open.



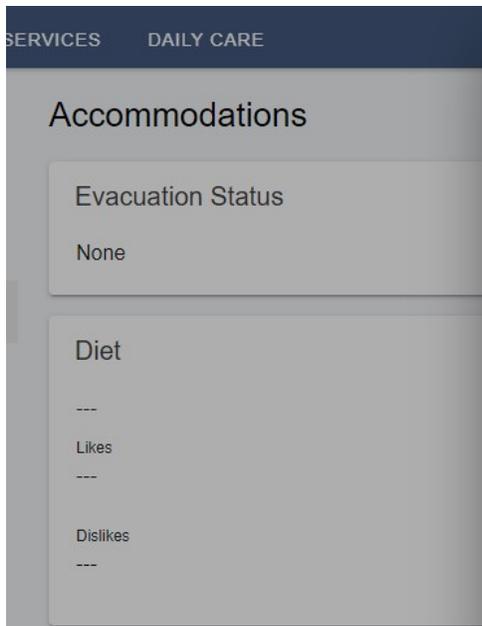
75. Click "Diet" to select.



76. Diet is a multiple select type field. Select all that apply then click outside the list to close.



77. Click to enter Likes and Dislikes.



Diet

Select
Consistent Carb

Likes



Dislikes

78. Click "SAVE"

