



NEXT Release Notes 2025.6.2

Introducing Cloud Storage for Eldermark NEXT

We're excited to announce **Cloud Storage** in Eldermark NEXT — a secure, centralized home for all your resident documents. This new feature eliminates the hassle of manual file handling, giving your teams instant, reliable access to the data they need, whenever they need it.

No more searching through files — everything is stored in one place, automatically kept up-to-date, and accessible from Eldermark NEXT.

Key Benefits:

- **Faster setup:** Automatic initial sync ensures all resident, community, and staff data is aligned the moment Cloud Storage is activated.
- **Streamlined workflows:** Direct links from the 9-dot menu and resident profiles mean fewer clicks and faster access.
- **Always in sync:** Resident admissions, discharges, profile updates, and employee or community changes trigger automatic cloud updates.
- **Security you control:** New role-based permissions give you precise control over who can view, edit, or manage documents.

What's New in Cloud Storage Access

We've made it easier than ever to get to the documents you need, from anywhere in Eldermark NEXT:

- **9-Dot Menu Integration:** Jump to Cloud Storage from any module with a single click.
- **Resident Profile Shortcut:** Go directly to a resident's cloud folder from their profile, saving time and reducing navigation steps.

Automatic Sync for Key Events

You no longer have to worry about keeping your cloud data current — Eldermark NEXT now handles it for you:

- **Resident Census Events:** Syncs happen automatically when residents are converted, admitted, discharged, or have key date changes.
- **Profile Updates:** Changes to important resident details (like name, DOB, SSN, or status) are instantly synced.
- **Organization & Staff Changes:** Updates to employee, community, or organization records automatically flow to Cloud Storage.

Enhanced Role-Based Permissions

We've introduced flexible access levels so you can set the right permissions for the right people:

- **No Access:** Cannot view or use Cloud Storage.
- **Cloud User:** Can upload, view, modify, and delete files.



NEXT Release Notes

- **Cloud Manager:** Adds the ability to manage file categories.
- **Cloud Admin:** Full access, including the ability to permanently delete documents.

This ensures your data stays secure while giving staff the tools they need to work efficiently.

Why This Matters

With the launch of Cloud Storage in Eldermark NEXT, your team gets a faster, safer, and simpler way to store and manage documents — all without the manual steps and delays of traditional file handling.

Whether you're onboarding a new resident, updating staff access, or reviewing important files, Cloud Storage keeps everything organized, accessible, and in sync.

Contents

Employee Access for Cloud Storage	2
Accessing Cloud Storage	3
Unassigned Documents tab	6
Residents tab	8
Manage Categories	9
Recent Documents	11

Employee Access

To add or modify Cloud Storage access to an individual employee, go to the Users listing page and then select the user's name to open the Employee record. Click on the Permissions card to open the Permissions modal. Underneath the Custom section, click on the Cloud Storage area. Select the access needed from the drop-down.

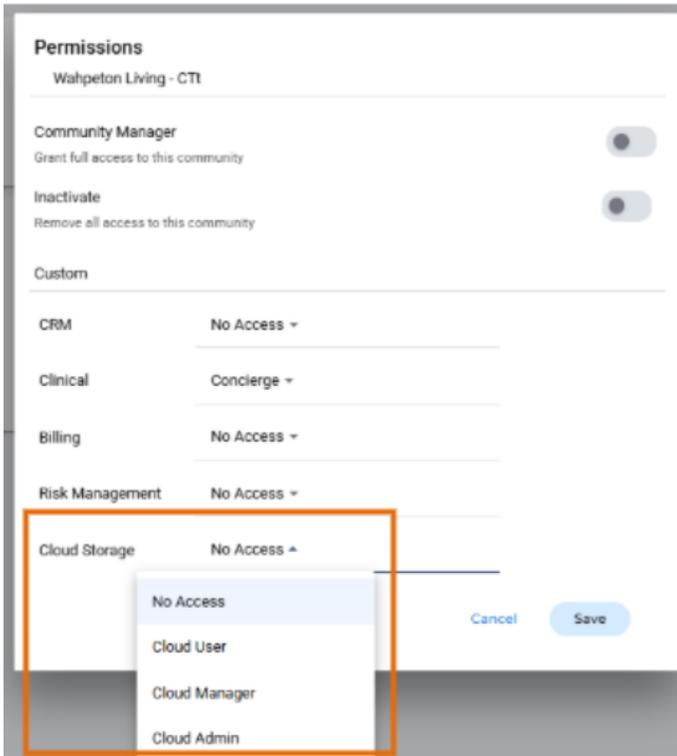
Note: Cloud Admin access will be assigned to any user who has been granted Org Admin or Community Admin Access.

Note: Any changes made to employee access take 10 minutes to sync to Cloud Storage.

Note: If the employee has access to more than one community, and you'd like to modify or add access for all communities, you will need to repeat these steps for each community.

The options for Cloud Storage access are:

NEXT Release Notes



No Access: User cannot access Cloud Storage.

Cloud User: Can upload, view, modify, and delete files.

Cloud Manager: Includes all Cloud User permissions, plus the ability to manage file categories. Enable this access for any user that needs to be able to manage categories within the Cloud. Eldermark recommends limiting this access to the staff responsible for setting up the initial categories.

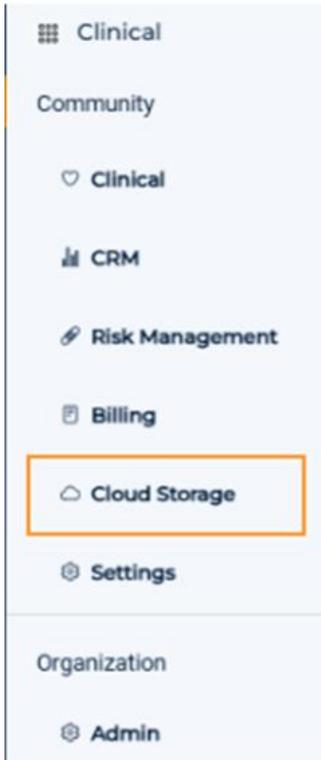
Cloud Admin: Full access, including the ability to permanently delete previously deleted documents. Enable this access for any user that needs the ability to permanently remove a document from Cloud Storage. Eldermark recommends limiting the number of employees with this access.

Accessing Cloud Storage

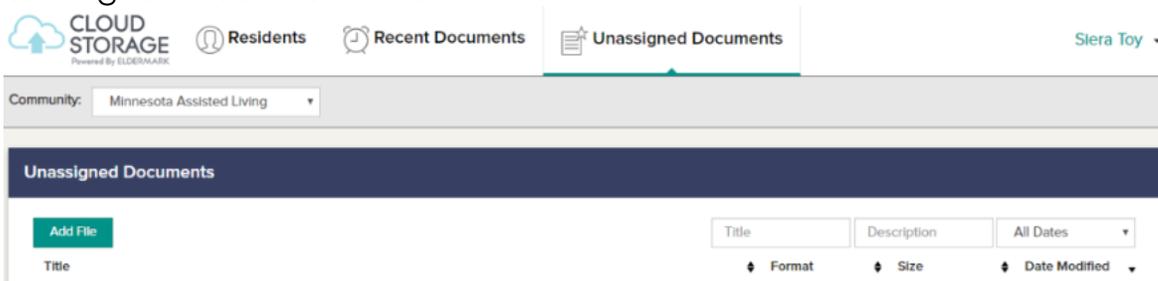
The first way to access Cloud Storage is within Eldermark NEXT.

To log in to the Unassigned Documents tab of the Cloud, click the 9-dot menu in the upper left hand corner and select the 'Cloud' icon.

NEXT Release Notes

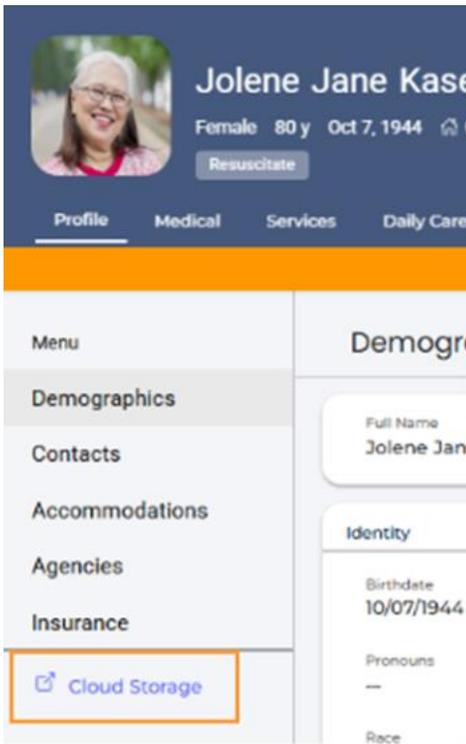


Once Cloud Storage is selected, a new tab will open that will bring you to the Cloud Storage Unassigned Documents tab.



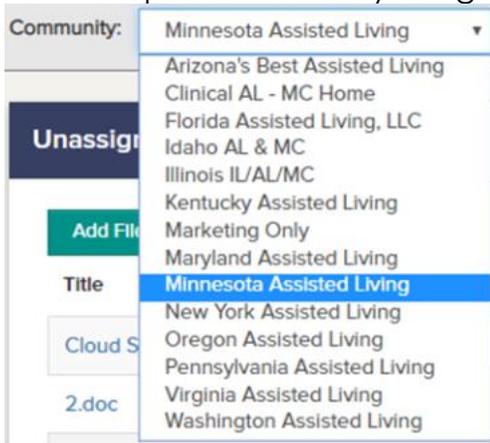
To log in to a specific resident's folder in Cloud Storage, click the Cloud Storage link on the Profile tab on the left navigation pane.

NEXT Release Notes



Once Cloud Storage is selected, a new tab will open that will bring you to Cloud Storage into that resident's folder.

If you have access to multiple communities you will need to select which community you want to upload files to by using the Community dropdown.



The other way is to navigate to the website <https://cloud.eldermarkexchange.com/login>. To log in to Eldermark Cloud NEXT, select the 'Login with NEXT' option. You will be prompted to enter the Company Name, this will be provided by Eldermark Staff. Once 'Continue' is selected, the user will be logged in.

NEXT Release Notes

The image shows two parts of the NEXT login interface. On the left is the main login form with a dark blue header labeled 'Login'. Below the header are three input fields: 'Company', 'Login', and 'Password'. A large green button labeled 'LOG IN' is positioned below the fields. At the bottom of the form is a link that says 'Login with NEXT'. On the right is a modal window titled 'Enter Company Name' with a close button (X) in the top right corner. It contains a text input field with the text 'NDliving' and two buttons at the bottom: a green 'Continue' button and a grey 'Cancel' button.

You will then enter your login credentials. The login and password will be the same credentials as your Eldermark login.

Unassigned Documents tab

Unassigned documents are documents that have been scanned or uploaded to the cloud that have not been assigned to a Resident. Here you can assign the documents to a resident file.

Use the Community picker to select the Community you would like to view.

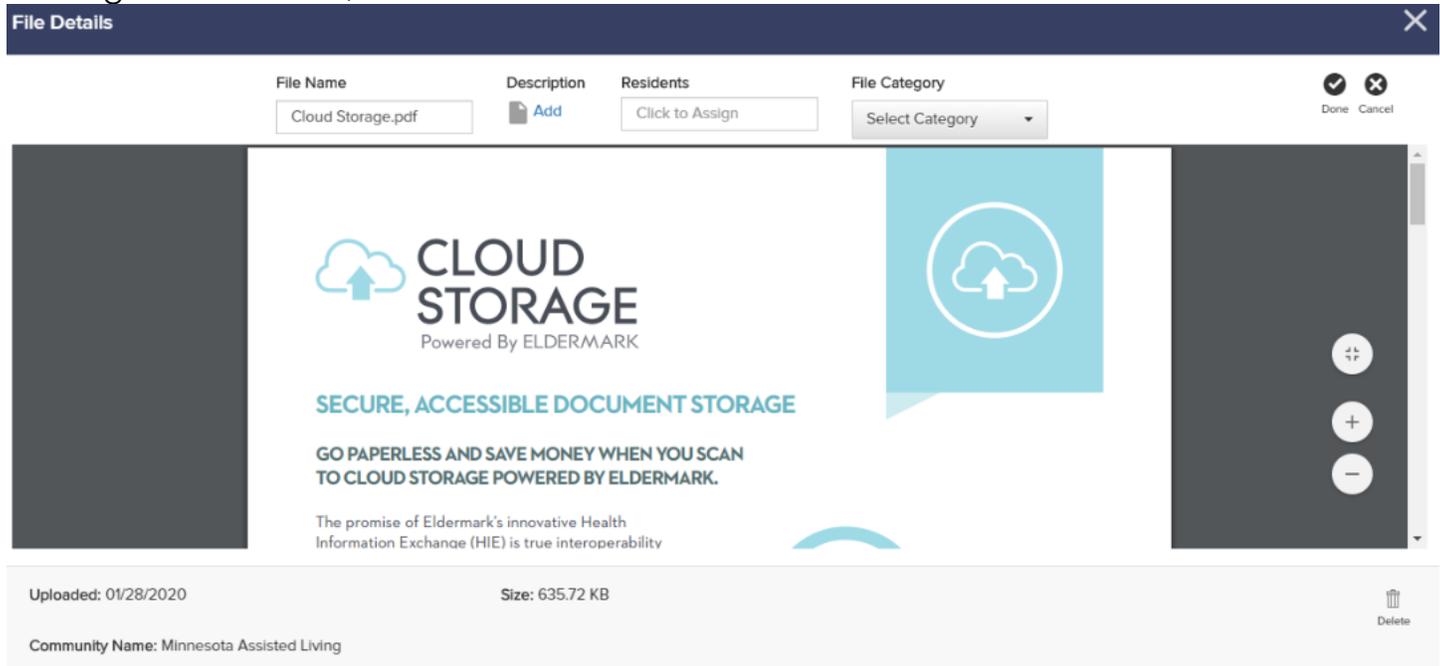
The image shows a navigation bar for the Cloud Storage interface. It includes the 'CLOUD STORAGE' logo (Powered By ELDERMARK) and four tabs: 'Residents', 'Recent Documents', and 'Unassigned Documents'. The 'Unassigned Documents' tab is highlighted with a green underline. Below the tabs is a 'Community' dropdown menu with 'Minnesota Assisted Living' selected.

To add a file to the Unassigned Documents, click on 'Add File' to open your File Explorer and select the document to upload. We also offer a Scanning Agent to be installed at each community. The Scanning Agent allows the user to scan a document directly to the Unassigned Documents tab of Cloud Storage. For more information or scheduling the scanning agent install, please contact Eldermark Support.

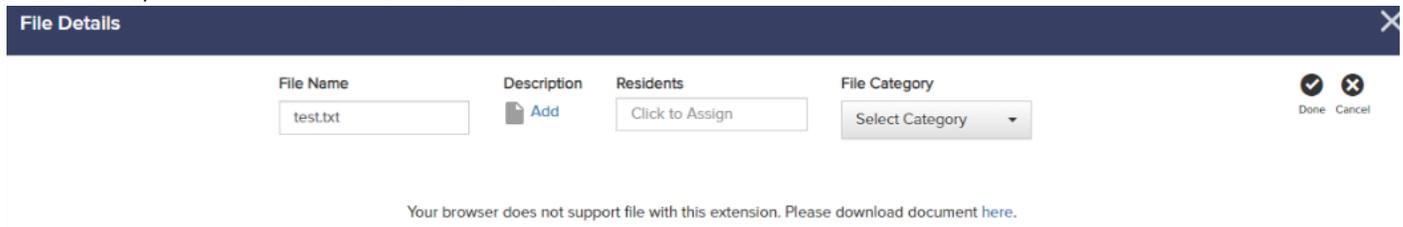
Add File

NEXT Release Notes

To assign a document, click on the document.



Cloud Storage will show a preview of the document if the file type is one of the following: PDF, XLSX, DOCX, PPTX or browser supportable image formats (JPEG, PNG, GIF, etc). If your document is any other file type, the user will see 'Your browser does not support file with this extension. Please download document here'. The document is in the Cloud, however, the user must download the document to view it.



File Name: Name the document according to your Company's Policy and Procedure.

Note: A file name can't contain any of the following characters: \ / : * ? " < > |

Description: Click 'Add' to enter a document description. Once a description is added, this will turn yellow.

Residents: Click to assign the resident. Start typing the resident name to search for a specific resident.

File Category: Click the drop down to see the list of Categories set up for your Company. Select the appropriate Category(ies) for the document. To manage the categories, please see below in the Residents tab section.

At the bottom of the document, details included Uploaded Date, Community Name, Size, and an option to Delete.

Once completed, click 'Done' or 'Cancel'. If a resident was selected, the document will no longer show on the Unassigned Documents tab and appear in the Resident folder.

NEXT Release Notes

Residents tab

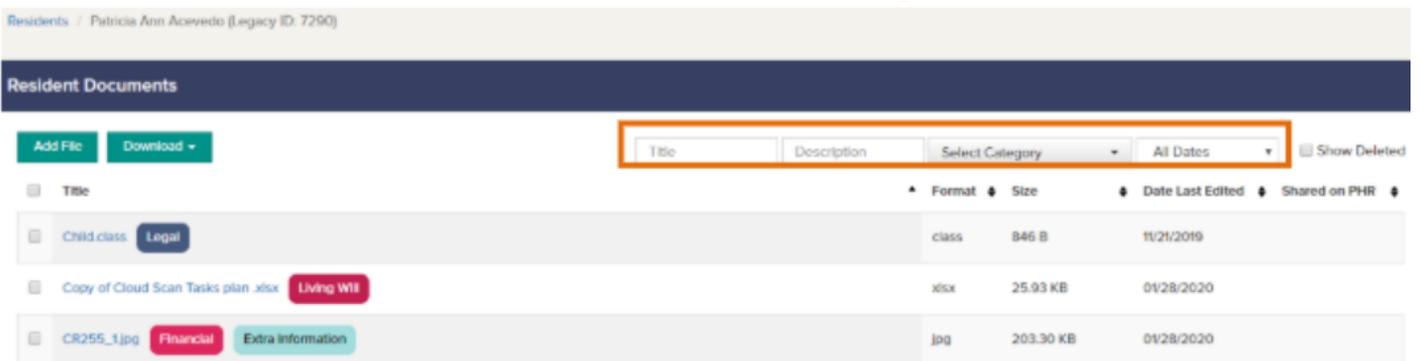
The Residents tab will show a list of the Discharged or Admitted residents for the selected community. To see admitted residents only, move the toggle to Admitted. When the toggle becomes green, residents that are admitted will be listed. To see discharged or residents without an admit date, move the toggle to Discharged. When the toggle becomes gray, residents that are discharged or never admitted will be listed. Select a resident from the listing screen or search for a resident by typing a few letters of their first or last name in the 'Resident Name' field.



Resident Name	Date of Birth	Social Security	No of Docs	Resident ID
Jackson, Benny		###-##-9875	1	7d78e7d8-aae9-4728-894c-7bfc11781309
Alley, Rose	08/18/1941	###-##-9989	0	3cf02a5a-1091-45b2-bb27-c4294c4559b0

Note: Admit/Discharge information, Resident name, Date of Birth, Social Security, and Resident ID information comes directly from Eldermark. Any changes made in the Eldermark will automatically sync to the Cloud within 10 minutes.

Select the Resident name to add, download or view existing documents.

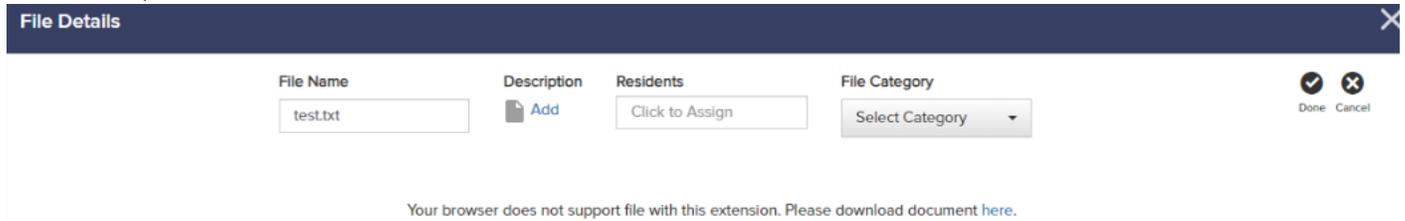


Title	Description	Select Category	All Dates	Show Deleted	
Child class	Legal	class	846 B	11/21/2019	
Copy of Cloud Scan Tasks plan.xlsx	Living Will	xlsx	25.93 KB	01/28/2020	
CR255_1.jpg	Financial	Extra information	jpg	203.30 KB	01/28/2020

Click 'Add File' to open the File Explorer to add a file directly to the resident's chart. Click 'Download' to download a .zip file of selected items, this page, or all pages. Use the Title, Description, Category, or Date filters to narrow down your search results. Click 'Show Deleted' to view documents that have been deleted, but not yet permanently removed. Click the title of the document to open the document. Cloud Storage will show a preview of the document if the file type is one of the following: PDF, XLSX, DOCX, PPTX or browser supportable image formats (JPEG, PNG, GIF, etc). If your document is any other file type, the user will see 'Your browser does not support file with this extension. Please download document here'. The document is in the Cloud,

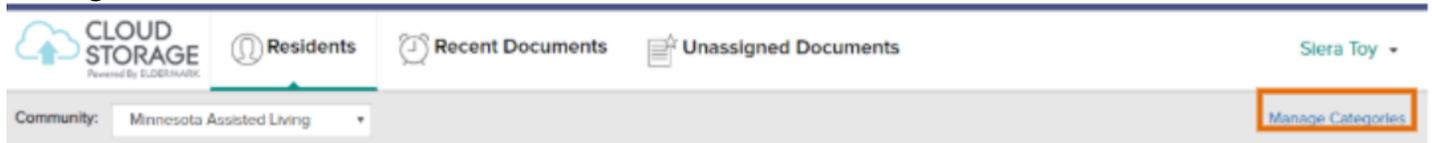
NEXT Release Notes

however, the user must download the document to view it.



Manage Categories

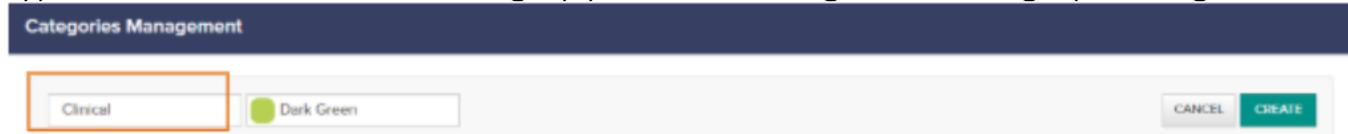
From the Residents tab, there is a 'Manage Categories' option if you have employee access to 'Cloud Storage Category Manager'. Categories Management gives you the ability to organize your resident specific documents by customizing the category set up. To add a new category, edit an existing category, or delete a category click on 'Manage Categories' from the resident tab.



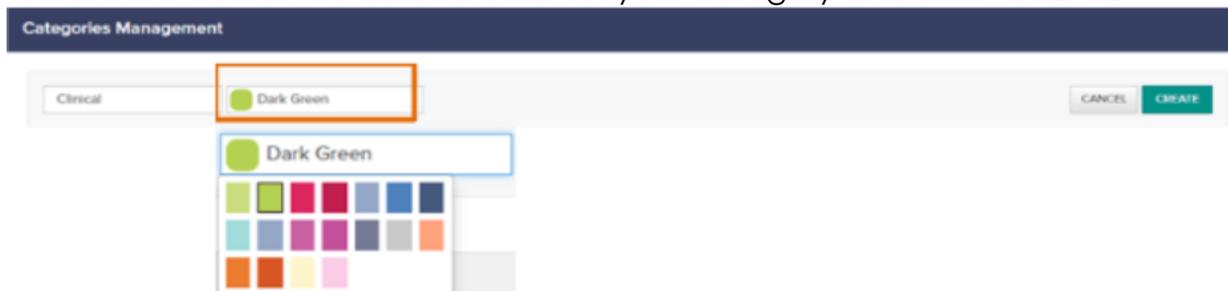
Here you can click on '+ADD NEW CATEGORY' to enter a custom category.



Type the desired title of the category you are creating in the category manager list.



To assign a color to the category, click in the color text box to open other available colors to select from. Select the desired color for your category and click 'CREATE'.

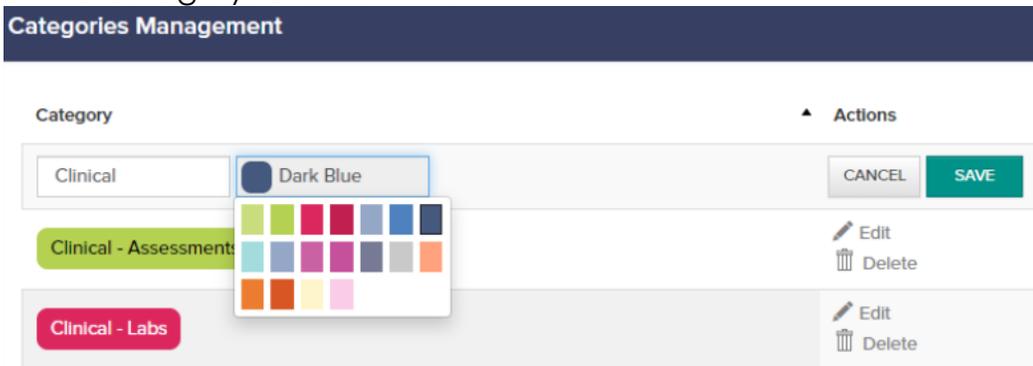


Once you have finished adding all the categories, you will see an alphabetical listing of the customized categories you have created.

NEXT Release Notes

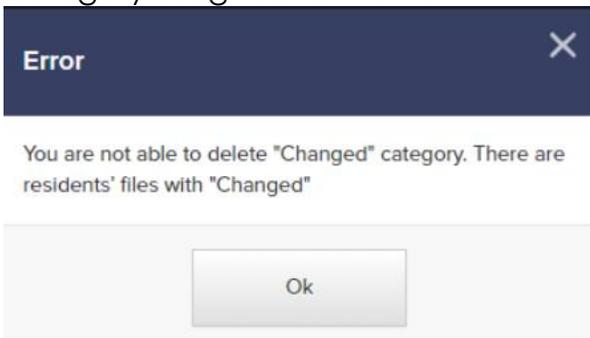


To make changes to the current category, click 'Edit'. To make changes to the title or color of the category. Click 'SAVE'.



To delete a category, click 'Delete'.

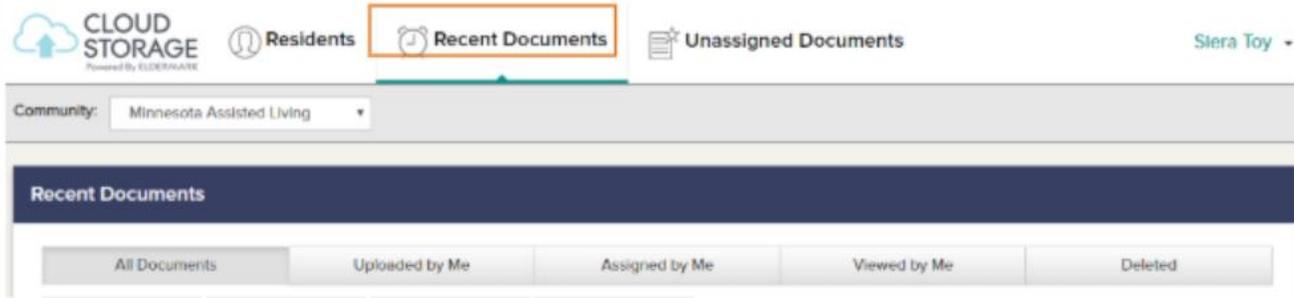
Note: A category cannot be deleted if there are resident documents with that specific category assigned to them.



NEXT Release Notes

Recent Documents

Recent documents tab provides details of all recent documents and activity in the cloud.



All Documents: This filter shows all documents that have been uploaded or deleted in the specified community.

Uploaded by Me: This filter will show Unassigned documents that were uploaded by the current user.

Assigned by Me: This filter will show all documents that the current user has assigned to a resident.

Viewed by Me: This filter will show all documents that the current user has viewed.

Deleted: This filter will show all documents that have been deleted but not permanently removed. Deleted files can be restored by clicking 'Restore' next to the Document Title. Deleted files can be removed if the user has a security group with 'Cloud Storage Super Admin' access.

The screenshot shows a table of recent documents. The table has columns for 'Folder', 'Document Title', 'Format', 'Size', and 'Date Modified'. Two documents are listed:

Folder	Document Title	Format	Size	Date Modified
Residents/Acevedo, Patricia	Conn_Refused.PNG	png	49.53 KB	01/28/2020
Residents/Aadya, Divya	Hoy.txt	txt	0 B	01/08/2020