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State Form Additions

New York

New York DOH 4397 9-12 Part B Form Now Available

The DOH 4397 9-12 Part B form is now available for printing from the Form Library. This form supports New York state regulatory requirements and can be generated directly from the Evaluations section. It includes key data from completed evaluations and the resident profile to ensure accurate and compliant documentation for clinical providers.

New York State Department of Health
Division of Assisted Living

**ASSISTED LIVING RESIDENCE
RESIDENT EVALUATION**

Resident's Name: Ian Abouto
Facility Name: Peaceful Pines Date of Evaluation: 07/23/2025

SECTION 1: COMMUNICATION/DENTAL/VISION/HEARING

Can the individual Speak English? Yes No Read English? Yes No Write in English? Yes No

Can the individual understand instructions in English? Yes No

If no to any of the above, indicate dominant language: Speak: _____ Read: _____ Write: _____

Verbal Expression/Speech (check all that apply):

Easily Understood Yes No Difficulty finding words or expressing self Yes No
Slurred or mumbled speech Yes No Understands directions Yes No

SPEECH: Does the resident have a speech defect / impairment? Yes No

Idaho

New Idaho State Form: ID Roster Sample Matrix

Idaho clinical providers can now access and print the **ID Roster Sample Matrix** form to support state compliance requirements. The form includes all active residents with an Admit date, pulling information from the most recent finalized evaluation. Users can also filter residents by Unit Product type before printing.

A new **ID Roster Sample Matrix** card has been added to **Clinical > State Forms**. The card includes filtering options by resident care level within a modal for easier customization.

FACILITY ROSTER / SAMPLE MATRIX

FACILITY Blue Bay Homes DATE 07/23/2025

Resident Number	Assigned Supervisor	Resident Room	Resident Name	1. Alzheimer's Dementia Diagnosis	2. Developmental Disability Diagnosis	3. Mental Illness Diagnosis	4. Traumatic Brain Injury Diagnosis	5. Behavioral Symptoms	7. Self-Administers Medications	8. Outside Services	10. Dietary Accommodations	11. At Risk Conditions	12. Assistance with Transfers/Mobility
01			Sandra Lee	X									
01			Lucy Ball	X	X	X	X	X					



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Plan of Care Enhancements

New Plan of Care Trigger Option from Evaluations

Clinical managers now have more control over workflows with a new toggle in **Plan of Care Setup**. This enhancement allows evaluations to trigger a Plan of Care or Service Plan based on your organization's needs.

- When enabled, completing an evaluation will prompt for Plan of Care actions.
- When disabled (default setting), no Plan of Care prompts will appear during evaluations.

This flexible setup helps align care planning with your preferred clinical workflows.

Edit Settings

Plan of Care

Turning off plan of care removes plan of care from resident charts and forms.



Enable in Evaluations



Enhanced Service Catalog and Evaluation Workflow for Plan of Care

We've introduced a series of updates to improve how Services, Areas of Focus, and Expected Outcomes are managed and suggested during evaluations.

Plan of Care Section in Service Catalog

A new **Plan of Care** section has been added to each service in the **Service Catalog** under **Config > Service Catalog > Services**:

- Clinical managers can now assign an **Area of Focus** via a dropdown and view related **Suggested Expected Outcomes**.
- Only active Areas of Focus will be available for selection.
- Tied expected outcomes are managed in the Plan of Care configuration area.

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← Service Catalog

Bathing: Cueing/Standby [Edit](#)

Profile

Name
Bathing: Cueing/Standby

Category
Bathing

Service provider role	Time (minutes)
---	30

Description
Unlicensed assistive personnel to cue resident through the bath or shower and to provide standby assist as needed to complete the bathing activity.

Status
enabled

Requirements

Equipment needed: none selected

Vitals, labs and input/output needed: none selected

Location

Exclusions

none selected

Plan of Care

Area of Focus	Suggested Expected Outcomes
Bathing: Needs/receives verbal cueing/standby during bathing	Bathing: To keep skin clean and moist Bathing: [Res] to keep skin clean and moist, maintaining ability to keep self clean with reminders and setup assistance. Bathing: [Res] is independent in maintaining personal hygiene and is clean, neat, and odor free.

Schedule

Intervals

Frequency

Smarter Evaluation Suggestions

Evaluations will now more clearly display relevant **Areas of Focus** and **Expected Outcomes** tied to the suggested services—helping teams create more targeted and effective care plans.

Updated Service Detail Page Design

We've redesigned the service detail page for improved usability:

- A two-column layout offers better organization of information.
- Users can now edit directly on the page via a new **Edit** button—no modal overlays.
- Edits trigger a **Save** button, and users will be alerted about unsaved changes if they try to navigate away.
- View-only mode clearly displays saved information for reference.

Create and Manage Plans of Care During Evaluations

Clinical providers and above can now create and manage Plans of Care directly from suggested services during the evaluation process.

- A new **Area of Focus** section has been added to the Service modal in **Resident > Evaluation > Service Plan > View Service**.
- Users can select an Area of Focus and manage multiple **Expected Outcomes** tied to that focus.
- Services can be added to an existing Plan of Care or used to create a new one—right from the evaluation workflow.
- This feature is available only when the Care Plan feature is enabled, giving teams flexibility in how care services are documented and managed.

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New Plan of Care Tab in Evaluation Workflow

Clinical users can now review, edit, and print a resident's Plan of Care directly within the evaluation process.

- A new **Plan of Care** tab has been added to **Resident > Evaluation**, allowing users to view and manage Areas of Focus and Expected Outcomes tied to selected services.
- The tab includes a detailed table showing each service's **Effective Date**, **Service**, and **Status**.
- Any updates made in this tab will automatically sync with the resident's overall care plan.
- From the **Actions** menu, users can now **Print the Plan of Care Form**, selecting the effective date to customize what is included.

← Evaluations

Level of Care ✓ Autosaved [Sign](#) [Actions](#)

Score: 8.00 Care Level 4 Completed Completed by Myriah Kern RN on 11/22/2024 05:24 PM

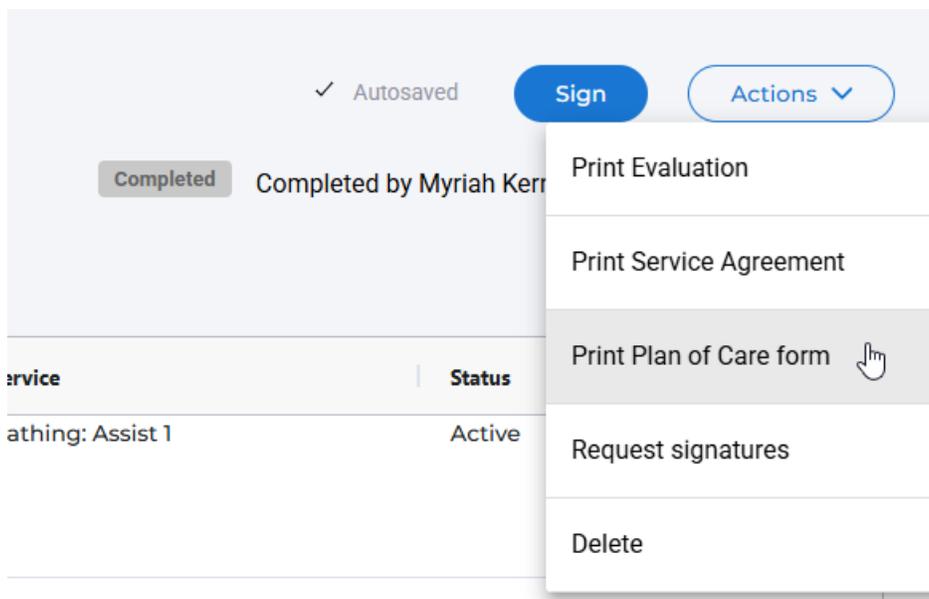
QUESTIONS SERVICE PLAN PLAN OF CARE ACTIVITY

Actions	Area of Focus	Expected Outcome	Effective Date	Service	Status
⋮	Bathing: Needs/receives physical ...	Bathing: To maintain independence Bathing: To improve bathing skills. Travis currently will not wash self at all	07/23/2025	Bathing: Assist 1	Active

Filters



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Custom Fields Now Available on Printed Plan of Care Forms

To provide greater flexibility, printed Plan of Care forms can now include **custom groups and fields** pulled from the resident record.

- In **Plan of Care Edit Mode**, a new **Custom Fields** checkbox allows users to include additional resident information.
- A searchable dropdown lets users select or deselect custom fields, with badges displayed for selected options.

Information Included

Resident Information

- | | |
|---|--|
| <input checked="" type="checkbox"/> Allergies | <input checked="" type="checkbox"/> Medicaid Number |
| <input checked="" type="checkbox"/> Biography | <input checked="" type="checkbox"/> Medical Record Number |
| <input checked="" type="checkbox"/> Diagnoses | <input checked="" type="checkbox"/> Personal Directives |
| <input checked="" type="checkbox"/> Diet | <input checked="" type="checkbox"/> Start of Care date |
| <input checked="" type="checkbox"/> Evacuation Status | |
| <input checked="" type="checkbox"/> Custom Fields: | <input type="checkbox"/> Additional Info X <input type="checkbox"/> Entertainment Preferences X <input type="checkbox"/> Information X |

Search Custom Fields



Pharmacy Integration Improvements

Improved Pharmacy Integration for Resident Admissions

We've made several behind-the-scenes enhancements to streamline how resident information flows from your pharmacy system into the clinical platform:

- **Faster Resident Creation:** Residents are now automatically created and marked as active when admission details are received from the pharmacy, reducing manual entry.



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- **Automatic Housing Assignment:** When unit information is provided, residents are automatically assigned to the correct unit and appear in the active resident list.
- **Admission Date Support:** Admission dates received from the pharmacy are now recognized and used to create accurate admission records.
- **Smarter Unit Matching:** Pharmacy unit names are now mapped to your community's unit names, ensuring residents are placed correctly without additional steps.
- **Enhanced Configuration:** A new field has been added to unit setup for managing pharmacy-to-community unit mapping, giving you more control and alignment between systems.

Vitals Deletion Striking

We've enhanced how deleted clinical data is displayed to support greater transparency and accountability in resident records.

- **Strikethrough Display:** Deleted entries in **Vital Signs**, **Labs**, and **Input/Output** are now shown with a strikethrough, so historical data remains visible.
- **User Metadata:** Each deleted entry includes data showing who deleted it and, where applicable, the source of the original entry.

Blood Pressure	New
120/80 mmHg 07/23/2025 09:46 AM	>
120/80 mmHg 05/09/2025 03:40 PM	Cares >
120/81 mmHg 11/25/2024 05:01 PM	>

Resident Notes Improvements

Enhanced Resident Notes Listing for Better Visibility and Workflow

We've updated the **Resident Notes** listing page to improve usability, visibility, and workflow efficiency for clinical users.

- **Grid View:** The listing now uses a Grid format with search, pagination, and improved organization.
- **Late Entry Toggle:** When using a Free Form template, a **Late Entry** toggle appears in the note modal. If the encounter date is in the past, the toggle is auto-enabled. A badge indicates late entries on the listing and detail views.
- **Expandable Notes:** Long notes can now be expanded or collapsed for easier reading. All notes default to expanded for better visibility, with options to adjust as needed.
- **Filters:** Quickly filter notes by **encounter date**, **late entry status**, or **deletion status** to find relevant entries faster.
- **Print Capability:** A **Print** button has been added to the medical tab, allowing users to print filtered note results along with resident details and active notes only.

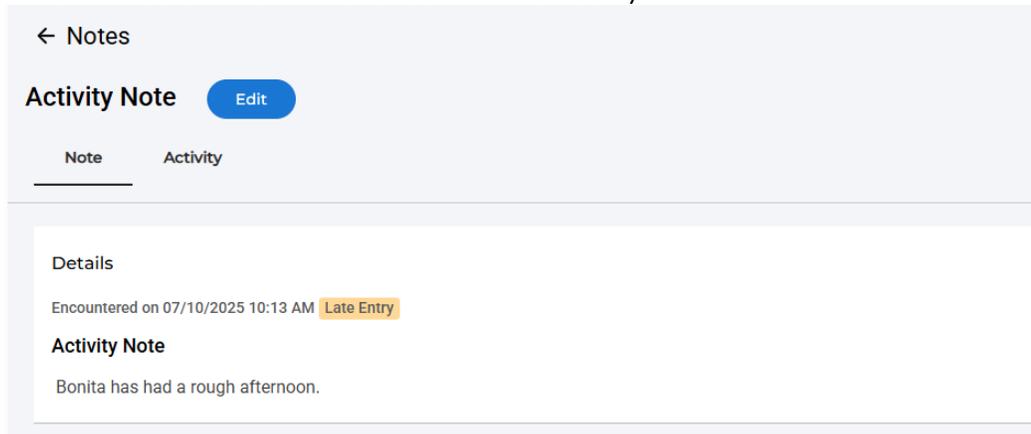
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Encounter	Category	Description
07/11/2025 11:28 AM By Kaden Saxberg,	Labs	Labs were sent to the hospital to review thyroid issues
07/11/2025 11:13 AM By Sarah Bement -	Behavior	Bonita is going through it this week.
07/10/2025 12:43 PM By Sarah Bement - UAT BA	Progress Note	<p>▼ Bonita is looking forward to this week's Book Club meeting scheduled for Wednesday. Each week, this recurring event offers her an opportunity to immerse herself in thoughtful conversations, lively discussions, and meaningful connections with fellow residents who share her love for literature.</p> <p>Currently, the Book Club is engrossed in the powerful novel <i>The Nightingale</i>. Bonita finds this book particularly captivating, appreciating its emotional depth and vivid portrayal of human resilience and courage. Every page offers something profound, stirring her thoughts and deepening her anticipation for the upcoming session.</p> <p>Bonita takes special care in preparing for the weekly meeting. She has meticulously annotated her copy, highlighting key themes, memorable quotes, and character developments. These thoughtful preparations enhance her enjoyment and participation during the discussions, allowing her to contribute insights that foster engaging dialogues within the group.</p> <p>Her excitement for Wednesday's Book Club is palpable. Bonita appreciates not only the intellectual stimulation provided by the discussions but also the social interactions. The group has cultivated a welcoming and inclusive environment, making each session feel like a gathering of close friends rather</p>

New Note Detail Page with Full Edit History and Print Options

We've added a dedicated **Note Detail Page** to improve visibility, accountability, and audit tracking for clinical documentation.

- **View and Edit Tabs:** Each note now has its own detail page with two tabs—**Note** and **Activity**. Users can view all note information, including encounter and creation dates, and authorized roles can edit note content directly.



- **Edit Mode with Alerts:** Editable fields can be updated via an **Edit** button. If changes are made and not saved, the system will alert users before navigating away.
- **Activity Tracking:** The **Activity** tab shows a full history of edits and deletions, including who made each change and when. Clicking an activity entry opens a **side sheet** with detailed field-level change history.

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The screenshot shows the 'Activity Note' interface. At the top, there are tabs for 'Note' and 'Activity'. Below is a table with columns: Activity, Date/Time, Person, and Role. The table contains two rows: 'Created' on 07/23/2025 12:50 PM by Myriah Kern (RN) and 'Modified' on 07/23/2025 12:51 PM by Myriah Kern (RN). To the right of the table is a 'Modified Note' section with a close button. It contains two paragraphs of text, one labeled 'Old:' and one labeled 'New:'. At the bottom right, there is a 'Page Size' dropdown set to 20, and navigation icons for '1 to 2 of 2' and 'Page 1 of 1'.

- **Deleted Notes:** Users can now delete their own notes with a required reason. Deleted notes remain visible with a **strikethrough and greyed-out appearance** for transparency.

The screenshot shows the 'Notes' interface. At the top, there is a 'Notes' header with a 'Collapse All' button. Below is a search bar. Underneath is a table with columns: Encounter, Category, and Description. The table contains one row: 'Late Entry' on 07/15/2025 12:36 PM by Myriah Kern, RN, under the category 'Care Staff Note'. The description is a long paragraph of text describing a resident's condition and care.

Print Options: A new **Print** button allows users to print either the note alone or the note with its full activity history. Printed documents include key resident and note information for clear documentation.

SBAR Note Enhancement: Add Vitals Directly from the Note

You can now enter **vital signs directly within the SBAR note**, making it easier to capture critical information in one streamlined workflow.

- Click the **“Add”** button in the **Vitals** section of the SBAR template to open a new entry modal.
- Vitals entered here will automatically save to both the **SBAR note** and the resident's **Vitals detail page**, ensuring consistency and reducing duplicate entry.

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Vitals	Add
None	
Labs	Add
None	
I & O	Add
None	

EMAR Reports Only Role Addition

New EMAR Role: Reports Only Access

A new “**EMAR Reports Only**” role is now available for users who need visibility into EMAR reports without the ability to manage or pass medications.

- Users with this role can **view and print EMAR reports**, including MARs and medication lists.
- Access is **restricted to the Reports section** of the EMAR navigation menu for added clarity and security.
- Ideal for staff members who require **read-only access** for reporting or administrative purposes.

Clinical Fixes

Clinical and EMAR Issue Resolutions & Performance Enhancements

We've resolved several issues and made key performance improvements across Clinical and EMAR workflows to improve system responsiveness, accuracy, and user experience.

Evaluation Performance Enhancements

Significant improvements have been made to the resident evaluation process for faster loading and smoother interaction:

- **Faster Care Service Retrieval:** Reduced delays when selecting services within evaluations by optimizing backend processes.
- **Daily Care Scheduling:** Improved performance when rescheduling daily cares during evaluations.
- **More Responsive Questionnaire Updates:** Optimized how edits are saved to reduce lag and minimize unnecessary system activity.

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- **Faster Evaluation Loading:** Addressed slow load times and improved point calculation accuracy for comprehensive evaluations.
-

Resident Dashboard and Schedule Fixes

- **Incorrect Incomplete Admissions:** Resolved an issue where some residents were incorrectly listed as incomplete admissions or as "Ready for Evaluation" when they were not.
 - **Schedule Display Error:** Fixed an issue that prevented data from displaying when "All Providers" was selected in the Clinical Schedule.
 - **Leave of Absence Report Accuracy:** Updated the LOA report to exclude deleted or ended events that were previously showing incorrectly.
-

EMAR Improvements

- **EMAR Resident Visibility:** Addressed issues where residents were missing unit information or not appearing at all, ensuring accurate medication profiles and order access.
 - **Product Type Syncing:** Updates to product types in Settings now reflect correctly in the Occupancy section of the resident record.
-

User Interface Enhancements

- **Contacts UI Update:** Temporarily removed phone and email icons from the Contacts section to reduce confusion while those features are under development.
 - **CRM Phone Entry:** Resolved an issue requiring extra clicks to enter phone numbers, streamlining the input process.
-

ETL and Billing Accuracy

- **Occupancy End Date Alignment:** Ensured accurate transmission of Occupancy End Dates from NEXT to Legacy by removing time components and unnecessary fields, preventing date misalignment.

