NEXT Release Notes 2025.02.17

Service Schedule Creation

Eldermark NEXT creates an auto-assigned service schedule based on service plans and service provider unit assignments.

- The software will auto-populate scheduled service lists when a service plan is created, allowing users to document scheduled services.
- Scheduled services are generated 7 days from the start date if no end date is specified in the resident care service plan.
- It will return a list of residents with services scheduled for a specific shift.
- Updates are triggered by modifications in service provider assignments, units, service catalog, resident occupancy, and service plans.

Cares

The **Cares** feature provides a comprehensive view of resident care services by shift, allowing support staff to track and manage tasks easily.

- Users can view a list of residents with care items for a specific shift, grouped by timeframes, and see metrics like total residents, scheduled, remaining, completed, unscheduled, and not completed activities.
- The page allows filtering by assignment and status and provides a landing page for support staff to manage resident care efficiently.
- The listing screen will expand to show the resident name, unit number, number of services, service categories, time, total time, and status icon.

NEXT Release Notes

Resident Daily Care

Once a resident is selected from the Care listing, the user is directed to the Daily Care section of the resident chart. This feature allows for the viewing of scheduled care activities for a resident for a specific date and assignment.

- Support staff can view scheduled care activities for a resident on a specific date.

- Users can filter activities by assignment and view details like service name, planned time, and status.

- Status indicators include icons for complete, not complete, or missed services.

- Support staff can view task details and mark them as complete or not complete in the Daily Care section.

- Service details include service name, planned time, service description, instructions, health monitoring details, and more.

- If health monitoring items are indicated to be collected, health monitoring fields must be filled to mark a scheduled service as completed.

NEXT Release Notes

As Needed ("PRN")

- Support staff can view and select "as needed" care activities for residents to ensure proper documentation of services being provided.
- Each activity displays the service name, planned time, and status indicator (completed).

Unscheduled

- Staff can add unscheduled care activities to ensure residents have documentation of services being provided.
- The process includes selecting a service name, entering details, and saving the activity.
- A modal displays service details, allowing modifications to minutes and requiring notes if the reason is "Other."

Information Only

- "Information Only" services are not scheduled, require no sign-off.
- Users can create these services by selecting "Information Only" from the Frequency list, hiding time fields, and only providing start/end dates when creating a service on the service plan.

NEXT Release Notes

- These services are viewable under the Resident Chart in Daily Care, similar to As Needed services, and are read-only.

Service Delivery

The Service Delivery detail page allows Clinical Providers and Clinical Managers to view services completed, not completed or missed for a specific resident.

- Users can search by Service and use filter and print options on the detail page.
- The page includes a table with columns for selecting services, scheduled and actual service times, service type, assignment, and status.
- Clicking on a service line opens a modal for potential modifications.

Schedule

The schedule management area features tabs for Shift Status, Service Alerts, Not Completed Services, Active Assignments, and Past Assignments. This interface provides streamlined access to essential information, enabling management to efficiently monitor, document, and ensure services are delivered as planned.

Shift Status

NEXT Release Notes

- The shift status overview will display assignments in order of shift start time, showing assignments, shift details, and task counts.

- Columns will show:
    - Scheduled: Total number of services scheduled for the assignment's shift starting on the selected date

    - Remaining: Equals the number of scheduled services that have not been marked as Completed or Not Completed for the assignment's shift starting on the selected date

    - Missed: The number of scheduled services that have a status of Missed for the assignment's shift starting on the selected date

    - PRN: The number of As Needed services that were completed by the assignment during their shift starting on the selected date

    - Unscheduled: The number of unscheduled services that were completed by the assignment during their shift starting on the selected date

    - Not Completed: The number of scheduled services marked as Not Completed during that assignment's shift starting on the selected date

- Shift status is visually indicated with colored circles, representing completed, in-progress, missed, or upcoming tasks.

- Status Icons:
    - Green checkbox with circle: No services missed or needing review
    - Red X with circle: The shift has ended and has missed services
    - Blue circle with 3 dots: Schedule is in progress

Status

ⓧ

⊙

✓
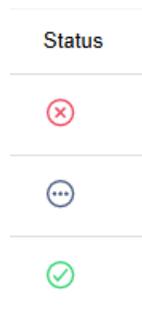
Service Alerts

NEXT Release Notes

- The Service Alerts dashboard highlights alerts for services alerts triggered for all residents.

- Clinical managers need to view alerts for improperly set-up services to ensure they are scheduled with auto-assign functionality.

- The feature will display service alerts for active residents, including a total count and a detailed list of alerts.

- Users can sort and search the service alert table and perform actions like viewing resident charts and service details.

- Examples of the alerts include:

  - **No Service Provider Assigned** - No provider is assigned to service

  - **Missing Unit Information** - Resident does not have a unit assigned or has no move in date.

  - **Future move in date** - Resident has a future move in date

  - **Outside provider shift** - Service is scheduled outside of the service provider shift

  - **Missing Scheduling Information** - When Frequency or Time is not indicated on the service

  - **Unit Unassigned** - When a unit is not assigned in Manage Units in Service Catalog

Not Completed

- Clinical Providers and Clinical Managers can view a list of not completed care services, with details like resident name, service, date, and reason. 'Not Completed' services are tasks that are marked as Not Completed by the service providers, for example of the resident refused a service.

NEXT Release Notes

- Actions available include viewing resident/service details and rescheduling tasks.
- Users can sort and search the canceled tasks table by any field, and a rescheduled flag indicates service status.

Active

Clinical Providers and Clinical Managers can view and print current and upcoming assignment service lists to manage assignments effectively in lieu of electronic documentation.

- The feature includes viewing details like assignment, date, resident name, unit number, and service name.
- Users can sort, search, and select assignments for printing

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NEXT Release Notes

Past

The Past tab enables Clinical Providers and Clinical Managers to review and print past assignment task lists.

- Clinical Providers and Clinical Managers can view and print past assignment task lists to manage assignments effectively.
- The feature includes viewing details like service provider assignment, shift status, and task completion status.
- Columns on Past Tab include:
  - Completed: The number of scheduled services completed during that assignment's shift starting on the selected date
  - Not Completed: The number of scheduled services not completed during that assignment's shift starting on the selected date
  - Missed: The number of scheduled services that have a status of Missed for that assignment's shift starting on the selected date
  - Review: The number of unscheduled services that were completed by that assignment during their shift starting on the selected date and still need to be reviewed (i.e., have a status of Reviewed)
- Users can sort and search through past assignments, with icons indicating assignment status.
- Status Icons include:
  - Green checkbox: No services missed or needing review
  - Red "X": The shift has ended and has missed services
  - Yellow pause: Services needing review
  - Blue circle with 3 dots: Schedule is in progress
- Clinical Providers and Clinical Managers will mark unscheduled tasks as reviewed to monitor for trends.

o The option to "Mark Task as Reviewed" is available only when the task status is "Review."

o Select the actions button and choose "View Service"

o To mark service as reviewed, select 'Marked Service As Reviewed'

Ambulation: Hoyer

Resident	Unit	Community
Morth, Howard	01	Red Door House

Type	Role
Unscheduled	Caregiver

Scheduled Date	Scheduled Time	Planned Minutes
02/14/2025	12:52 AM	30

Actual Date

Actual Date: 02/14/2025 ✕ 🗓

Actual Time: 12:52 AM ✕ 🕐

Actual Minutes: 30

Status: Review ▾

Employee: Myriah Kern RN ▾

Notes

0 / 500 Remaining

Mark Task As Reviewed

- Unscheduled Services will be put in the "Review" status.
- Marking a task as reviewed changes its status to "Completed."
- Clinical Providers and Clinical Managers can mark services as complete or not complete and assign the staff who completed services in the Past tab. This can be done as a bulk action. Select all services needed to be documented as Completed or Not Completed. Select the actions button in the upper right-hand corner. Select the Completed or Not Completed option, then select the name of the employee who

NEXT Release Notes

completed the tasks. This will default to the name of the user who is logged in. Printing of the list will also be available.

Schedule ⓘ

SHIFT STATUS   SERVICE ALERTS   NOT COMPLETED   ACTIVE   **PAST**

| Today | < | > | 📅 February 14, 2025 | Status: All ▼ | Search 🔍 | ⋮ |

Mark Complete

Mark Not Completed

Print Selected

< **Caregiver AM**

	Date	Time	Unit	Resident	Service	Employee	Actual	Planned	S
☑	02/14/2025	AM	02	Katie Holzworth	Bathing Ind	---	---	30	
☑	02/14/2025	AM	01	Mike Larson	Ambulation: Cueing/Standby	---	---	5	---	⋮
☑	02/14/2025	AM	02	Katie Holzworth	Transfer Assist 1	---	---	10	---	⋮
☑	02/14/2025	AM	01	Mike Larson	Transfer Assist 1	---	---	10	---	⋮