



# NEXT Release Notes 2025.7

## Release Overview – Clinical Enhancements

This release introduces a powerful set of improvements across **Evaluations, Resident Management, Service Planning, Housing, and EMAR**. The focus is on giving clinical teams **greater visibility, efficiency, and accuracy** in their daily workflows while strengthening compliance and audit readiness.

### Key Themes

#### 1. Smarter Evaluation Management

- New **filters and columns** help managers quickly find the right evaluations and see their status at a glance.
- **Version control and draft mode** make it easier to update evaluations without disrupting active ones.
- **Flexible scoring logic** supports both simple and complex workflows (e.g., fall risk scoring that doesn't affect overall care scores).
- A redesigned **Scheduling Tab with wizard and validation tools** ensures due dates are calculated correctly and consistently.
- The **Evaluation Due Report** and **Resident > Evaluations view** now provide clearer upcoming and overdue indicators, with quick actions to update due dates or complete evaluations.
- **Printing improvements** reduce wasted pages, allow condensed or full versions, and include optional suggested services for compliance reviews.

#### 2. Improved Service & Housing Visibility

- **Service Plans** now display a **Start Date column** and support sorting across multiple fields, making it easier to review timelines and prepare for billing.
- **Housing Occupancy** has moved from cards to a **grid/table view** for clearer history. Unit records can be edited directly and sync automatically with EMAR for accuracy.

#### 3. Better Documentation & Customization

- **Resident Notes** now allow up to **65,000 characters**, supporting complete billing and compliance documentation without splitting entries.
- **Resident Lists** can be customized with community-specific fields, with filtering options for more tailored reporting.
- **Evaluation Areas of Focus** default to today's date for consistency, reducing errors tied to mismatched timelines.

#### 4. State Compliance Support



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- **Kentucky:** Added the KY Resident Census and Condition Report, with survey-date filtering and printable census forms.
- **New Hampshire:** Imported the Resident Assessment Tool / Needs Determination, ensuring compliance with state-specific requirements.

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## 5. Medication Safety & Workflow Enhancements (EMAR)

- **Receive Orders:**
  - Multiple potential duplicate matches are now displayed so staff can clearly decide which to keep, replace, or edit.
  - A new “**Copy Existing Schedule**” option eliminates the need to rebuild complex schedules during renewals or replacements.
- **Physician Order Sheet** now includes orders ending today.
- **MAR** improvements ensure overdue meds are displayed correctly, vitals print with administrations, and supply orders no longer appear in MAR/TAR passes.
- Checkbox behavior in order receiving is now consistent, reducing confusion.
- Discontinued orders can now be released without errors.

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### **Bottom Line**

This release makes the Clinical system more **efficient, transparent, and reliable**. Community managers, providers, and clinical staff can work faster with clearer information, maintain better compliance, and reduce the chance of errors across evaluations, services, housing, and EMAR.

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## Clinical

### Evaluation Configuration Listing Screen Updates

#### Purpose of the Screen

The **Evaluation Configuration Listing Screen** provides community managers and above with oversight of evaluation setup, including status, scheduling, and activation controls. These updates expand filtering and visibility options, enabling faster review and management of evaluations at a community level.

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#### Key Enhancements

##### New Filtering Options

To improve navigation and precision, the listing screen now supports filtering by multiple configuration attributes:

- **Questionnaire Status:**
  - Filter evaluations by **Published** or **Unpublished** state.
  - Supports identifying evaluations that are still in draft versus those already in use.
- **Schedule Status:**
  - Filter evaluations by schedule state (**Published** or **Unpublished**).
  - Provides clarity on whether the evaluation is scheduled to appear on the evaluation due report or upcoming section of the resident record.
- **Enable Status:**
  - Quickly filter evaluations by **Enabled** or **Disabled** status.
  - Allows community managers to confirm which evaluations are actively available for use versus disabled.

#### Evaluations

|                      |                 |                    |
|----------------------|-----------------|--------------------|
| Questionnaire<br>All | Schedule<br>All | Enabled<br>Enabled |
|----------------------|-----------------|--------------------|



# NEXT Release Notes

## New Visual Indicators via Columns

Additional columns have been introduced for **at-a-glance visibility**, reducing the need to drill into individual evaluations for details:

- **Evaluation Status** – Published/Unpublished state of the evaluation itself.
- **Schedule Status** – Published/Unpublished state of the evaluation's associated schedule.
- **Enabled** – Indicates whether the evaluation is currently enabled or disabled.
- **Last Modified** – Displays the most recent modification date, helping track version control and administrative changes.

| Name                      | Questionnaire Status | Schedule Status | Enabled                             | Last Modified |
|---------------------------|----------------------|-----------------|-------------------------------------|---------------|
| 45-Day Nursing Assessment | PUBLISHED            | UNPUBLISHED     | <input checked="" type="checkbox"/> | 7/23/2025     |
| Elopement Risk            | PUBLISHED            | PUBLISHED       | <input checked="" type="checkbox"/> | 8/20/2024     |

These columns ensure that the evaluation configuration is immediately visible and actionable from the listing view.

## Evaluation Question and Scoring Configuration Enhancements

### Purpose of the Enhancement

The **Evaluation Configuration** process has been enhanced to support **versioning, draft workflows, and flexible scoring mechanisms**. These changes provide:

- **Version Control** for managing ongoing updates without disrupting active evaluations.
- **Draft Mode Editing** for safer modifications to published tools.
- **Improved Scoring Logic** to handle complex clinical workflows (e.g., risk evaluations within level of care evaluations).
- **Clearer Evaluation Lifecycle Management** with cloning, publishing, and deletion safeguards.

## Key Enhancements

### 1. Evaluation Versioning

- Evaluations now support **multiple versions**, enabling historical tracking and side-by-side comparison.
- **Use Case Example:** Edits to evaluations can be made in draft mode before pushing the evaluation edits into the resident record.
- **Copy Forward Functionality:** When creating a new version, unchanged questions can be copied forward, reducing duplication of effort.



# NEXT Release Notes

**Red Door House Level of Care (Copy)**  
Version 2 DRAFT ^

**Version Notes**  
Cloned from Version 1

**Sections**  
6 sections

**Last Modified**  
9/9/2025

[EDIT](#) [EDIT SECTIONS](#) [EDIT SCORING GROUPS](#) [CLONE](#) [DELETE](#) [PUBLISH](#)

---

**Red Door House Level of Care**  
Version 1 PUBLISHED v

## Draft Mode Editing

- Published evaluations can no longer be modified directly. Instead:
  - Users clone an evaluation into **Draft** to make updates without affecting the live evaluation.
  - Draft changes remain invisible in resident charts until published.
- **Benefit:** Ensures data integrity and prevents disruptions to in-progress evaluations.

## Evaluation Creation Workflow

When creating a **new evaluation**:

1. The system prompts for **Evaluation Name** and **Evaluation Type**.
2. Once the evaluation shell is created, the user must create the **first version**.
3. The **Evaluation Details Screen** now contains three tabs:
  - **Questions** – build and configure questions, sections, and scoring.
  - **Scheduling** – define scheduling rules for when evaluations are due.
  - **Schedule Validation** – validate schedule logic and ensure no conflicts.

## Questions Tab & Version Management

### Initial State

- If no versions exist, users see a placeholder message: “Questionnaire Versions: No questionnaire versions exist yet. Create the first version to begin managing questionnaire configurations.”
- A **Create First Version** button allows them to begin.

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QUESTIONS SCHEDULING SCHEDULE VALIDATION

## Questionnaire Versions

No questionnaire versions exist yet. Create the first version to begin managing questionnaire configurations.

CREATE FIRST VERSION

## Version Creation Modal

When creating a version, users can:

- Edit the **Evaluation Name**.
- Enter a **Version Note** (e.g., "Updated scoring logic for 2025").
- View the **prepopulated Version Number** (auto-assigned).
- Save as **Draft** to begin building without publishing.

### Create Questionnaire Version

Questionnaire Name  
Resident Evaluation

Version Notes  
Initial version of the evaluation

Version Number  
2

Cancel Save As Draft

## Evaluation Cards

Each version is displayed as a **card** with quick actions:

# NEXT Release Notes

NEW VERSION

## Resident Evaluation

Version 2

DRAFT ^

### Version Notes

Initial version of the evaluation

### Sections

0 sections

### Last Modified

9/9/2025

[EDIT](#) [EDIT SECTIONS](#) [EDIT SCORING GROUPS](#) [CLONE](#) [DELETE](#) [PUBLISH](#)

- **Edit** – Modify name and notes for that version.
- **Edit Sections** – Add and edit sections/questions.

← Evaluation Details

## Resident Evaluation

✓ Level of Care Evaluation

To add questions, first add a new or saved section.

[Add Section](#)

- **Edit Scoring Groups** – Launch the scoring wizard.

## Edit Scoring Groups Configuration

1 Configuration

2 Scoring Group

### Scoring Configuration

Does the questionnaire have multiple scoring groups?

Single

Multiple

- **Clone** – Create a copy of the evaluation for further modification.

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- Used for published evaluations that need adjustments or edits.
- **Delete** – Only available if the evaluation is still in Draft.

## Confirmation

Are you sure you want to delete "Resident Evaluation" Version 2? This action cannot be undone.



- **Publish** – Finalize and make available in resident charts.

### Resident Evaluation

Version 2 DRAFT ^

**Version Notes**  
Initial version of the evaluation

**Sections**  
0 sections

**Last Modified**  
9/9/2025

[EDIT](#) [EDIT SECTIONS](#) [EDIT SCORING GROUPS](#) [CLONE](#) [DELETE](#) [PUBLISH](#)

## Building Evaluations: Sections & Questions

- Evaluation building remains consistent with the existing workflow.
- **Three-level sub-question limit** continues to apply.
- **New Max Score Logic:**
  - If left **blank** → No max score displayed in section.

|                       |             |              |                      |   |
|-----------------------|-------------|--------------|----------------------|---|
| Resident Demographics | 0 Questions | No Max Score | <a href="#">Edit</a> | : |
| Body Systems          | 0 Questions | No Max Score | <a href="#">Edit</a> | : |
| Functional Evaluation | 0 Questions | No Max Score | <a href="#">Edit</a> | : |
| Fall Risk             | 0 Questions | 0 Max Score  | <a href="#">Edit</a> | : |

- If entered as **0** → Score is respected but does not contribute to total evaluation score.
- **Use Case Example:** A Fall Risk section may display within a Level of Care evaluation but should not add to the overall total score.

# NEXT Release Notes

Section Name  
Fall Risk

Max Score  
0

Cancel Save

## Edit Scoring Groups - Scoring Group Wizard

Set up evaluation scoring and define point values

Edit Scoring Groups Configuration

1 Configuration 2 Scoring Group

### Scoring Configuration

Does the questionnaire have multiple scoring groups?

- Single  
 Multiple

Points (Optional)

Point Value point equals Type Value Point type

Cancel

Next

## Single Scoring Group

Creates a **Primary Scoring Group Card**.

- Users can:
  - Rename the scoring group.
  - Assign **Care Levels** (from *Configuration > Care Level*).
  - Enter **Start and End Points** for each Care Level.



# NEXT Release Notes

1 Configuration

2 Scoring Group

## Scoring Groups

Primary Scoring Group TODO ^

Scoring Group Name  
Primary Scoring Group

Care Levels

| Care Level   | Starting Points | Ending Points |
|--------------|-----------------|---------------|
| Care Level 1 | 0.00            | 10.00         |
| Care Leve... | 10.01           | 20.00         |
| Care Level 3 | 20.01           | 30.00         |

Cancel Previous Save

- **Precision Support:** Care Levels can be configured to **two decimal places**.
- **Validation Rules:**
  - No overlaps in point ranges.
  - No gaps between levels.
- **Navigation:**
  - **Mark Complete** and **Save** → Saves progress.
  - **Previous** → Returns to the prior screen without committing changes.
  - **Cancel** → Exits without saving.

## Multiple Scoring Groups

- Requires a **Placement Question** to assign residents to the correct scoring rotation.

# NEXT Release Notes

## Edit Scoring Groups Configuration

1 Configuration ————— 2 Placement Question ————— 3 Scoring Groups

### Placement Question

Cancel

Previous Next

- **Supported Question Types:**
  - **Single Select**
  - **Yes/No**
- **Not Supported:** Multi-Select.
- Each answer option in the placement question defines a **Scoring Rotation**.
- **Visual Aid:** Placement Questions are labeled with a **badge**.

Does resident have a pet?

SCORING PLACEMENT QUESTION    SCHEDULING PLACEMENT QUESTION

Yes ▼

- If the placement question is modified later, the scoring matrix **must be reviewed and revalidated**.

---

### Evaluation Management Rules

- **Clone:** Only way to modify a published evaluation (ensures historical versions remain intact).
- **Delete:** Only allowed for **Draft** evaluations.

# NEXT Release Notes

- **Publish:** Makes the evaluation available for assignment and completion in resident charts.

## Scheduling Tab Enhancements

### Purpose of the Enhancement

The **Scheduling Tab** has been redesigned to bring structure, validation, and flexibility to the evaluation scheduling process. The goal is to ensure that every evaluation due date is:

- **Accurately calculated** based on admission, care start, or prior evaluation.
- **Validated against predefined evaluation-specific rules.**
- **Protected by guardrails** that prevent incomplete or incorrect scheduling.
- **User-friendly**, providing an intuitive wizard-based experience to reduce manual errors.

This release introduces **schedule versioning, rotation management, exclusions, validation rules, and UI improvements**, ensuring that scheduling logic is predictable, repeatable, and auditable.

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## Key Enhancements

### Scheduling Versioning

- Each evaluation now supports **version-controlled schedules**, allowing admins to:
  - Create draft schedules.
  - Review before publishing.
  - Clone and update schedules without overwriting historical versions.
- **Benefit:** This ensures that past versions remain intact for compliance and audit purposes while new schedules can be iterated safely.

### Initial User Experience

- If no schedules exist, users are presented with the message:

*"Schedule Versions: No schedule versions exist yet. Create the first version to begin managing scheduling patterns."*

- A button labeled **Create First Version** allows the user to begin configuration.

# NEXT Release Notes

## Schedule Versions

No schedule versions exist yet. Create the first version to begin managing scheduling patterns.

[CREATE FIRST VERSION](#)

## Schedule Version Modal

- **Fields available:**
  - Version Name (editable).
  - Version Notes (for audit trail / context).

### Create Schedule Version

1 Basic Info ————— 2 Rotations ————— 3 Exclusions

#### Basic Information

Schedule Name

Resident Evaluation Schedule - Version 2

Version Notes

Version Number

2

Does the schedule have multiple rotations?

Single

Multiple

[Cancel](#)

[Next](#)

## Single vs. Multiple Rotations

When creating a schedule, the user is prompted with:

*“Does the schedule have multiple rotations?”*

# NEXT Release Notes

- **Single Rotation:**
    - Use when all residents follow the same schedule pattern.
  - **Multiple Rotations:**
    - Use when evaluation frequency varies depending on resident conditions or attributes.
    - Example scenarios:
      - Different care levels (AL, MC, IL) have distinct evaluation frequencies.
      - Evaluation only applies under specific conditions (e.g., *residents who smoke, residents with pets*).
    - Each answer to a **Placement Question** generates its own schedule rotation.
- 

## Rotation Setup Workflow

### Step Creation

- A **To Do card** is generated for each rotation.
- Users can:
  - Rename the **Rotation Name**.
  - Add rotation steps to define when evaluations are due.
- An **initial step** of “1 day after admission” is provided by default.



# NEXT Release Notes

## Create Schedule Version

1 Basic Info ————— 2 Rotations ————— 3 Exclusions

### Rotations

Default Rotation TODO ^

Rotation Name

Rotation Steps

after  ■

[+ Add Step](#)

Last step repeating

[Mark Complete](#)

[Cancel](#)

[Previous](#)

[Next](#)

[Save](#)

### Adding Rotation Steps

- Steps can be edited or deleted.
- Frequency intervals can be defined using:
- Days, Weeks, Months, Years

Rotation Steps

after  ■

[+ Add Step](#)

Last step repeating

[Mark Complete](#)

Days

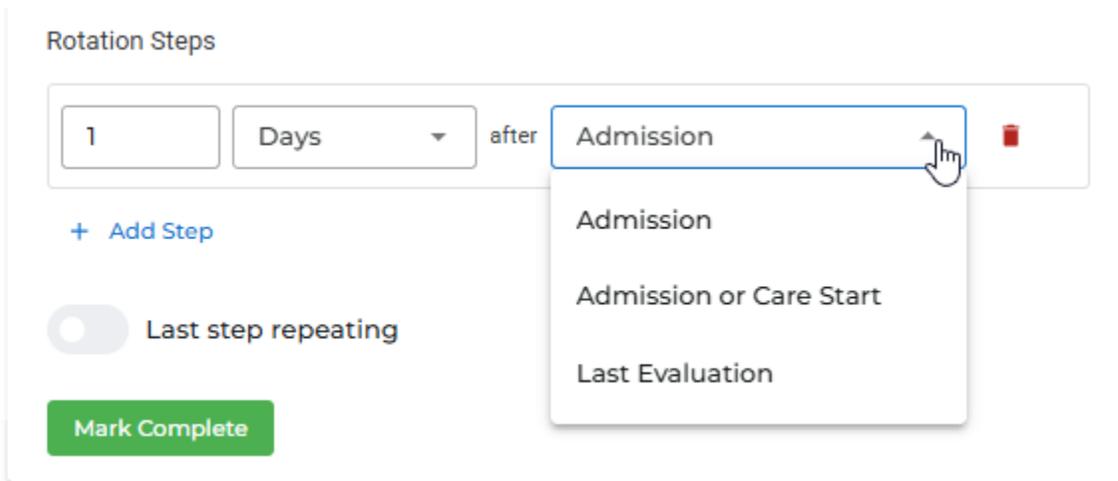
Weeks

Months

Years

# NEXT Release Notes

- **Trigger actions** for scheduling include:
  - **Admission Date**
  - **Admission or Care Start Date**
  - **Last Evaluation Date**



## Trigger Logic in Detail

Admission vs. Care Start has been added as an option for scheduling logic.

- If “Since Admission or Care Start” is selected, the system compares the **Admission Date** and the **Care History Start** Date and uses the **later** of the two.

| Scenario   | Behavior  |
|--|---|
| Admission + Care History Start both exist                                  | Later of the two used.  |
| Care History Start exists after Admission Date                             | Care History Start used.  |
| No Care History Start exists   | Admission Date used (unless “No Care History” exclusion applies). |
| Care History Start has an end date + “No Care History” exclusion is active | Resident excluded from schedule.                                  |

## Last Evaluation

- If the trigger is “Since Last Evaluation,” the system looks at the date of the most recent **signed evaluation**.
- This ensures rolling schedules remain in sync with actual completion.

# NEXT Release Notes

## Rotations

Default Rotation TODO ^

Rotation Name  
Default Rotation

Rotation Steps

|    |      |       |                 |  |
|----|------|-------|-----------------|--|
| 1  | Days | after | Admission       |  |
| 14 | Days | after | Admission       |  |
| 90 | Days | after | Last Evaluation |  |

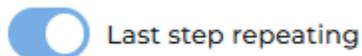
[+ Add Step](#)

Last step repeating

[Mark Complete](#)

## Repeating Steps

- The last rotation step can be set to **repeat indefinitely** until discharge.
- Useful for ongoing evaluations that recur every set interval.



## Exclusions

Exclusions ensure that residents are removed from scheduling when conditions apply.

- **Product Type Exclusion:** Removes residents based on unit product type.
- **No Care History:**

# NEXT Release Notes

- Residents with no active Care History records are excluded.
- Residents with only inactive Care History records are also excluded.

## Create Schedule Version

1 Basic Info ————— 2 Rotations ————— 3 Exclusions

---

### Exclusions

Independent Living

Assisted Living

Memory Care

Respite Care

Care Suites

Enhanced Care

No Care History

- **Use Case:** Exclude residents from a Memory Care evaluation if they are in Assisted Living units.

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## Multiple Rotations & Placement Questions

When **Multiple Rotations** are chosen:

- Users must select a **Placement Question**.

# NEXT Release Notes

## Edit Schedule Version

1 Basic Info ——— 2 Placement Question ——— 3 Rotations ——— 4 Exclusions

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### Placement Question

Select Questionnaire Version

Pet Safety Eval (Copy) - Version 2

Select Placement Question

Pet Safety > Does resident have a pet?

[Cancel](#)

[Previous](#) [Next](#)

---

- Valid question types: **Single Select** and **Yes/No**.
- Invalid: **Multi-Select**.
- Each answer option creates a **separate rotation** with its own scheduling steps.



# NEXT Release Notes

## Edit Schedule Version

1 Basic Info — 2 Placement Question — 3 Rotations — 4 Exclusions

### Rotations

|                                   |          |   |
|-----------------------------------|----------|---|
| Rotation for "YES"<br>Answer: YES | COMPLETE | ▼ |
| Rotation for "NO"<br>Answer: NO   | COMPLETE | ▼ |

Cancel

Previous

Next

Save

Rotation for "YES" COMPLETE ^

Answer: YES

Rotation Name

Rotation for "YES"

Rotation Steps

|     |      |       |                 |   |
|-----|------|-------|-----------------|---|
| 1   | Days | after | Admission       | ✖ |
| 365 | Days | after | Last Evaluation | ✖ |

+ Add Step

Last step repeating

Mark Complete

# NEXT Release Notes

Rotation for "NO" COMPLETE ^  
Answer: NO

Rotation Name  
Rotation for "NO"

Rotation Steps

1 Days after Admission 

[+ Add Step](#)

Last step repeating

[Mark Complete](#)

- **Placement Question Badge:** Placement questions are tagged within the evaluation setup.

Does resident have a pet?

SCORING PLACEMENT QUESTION SCHEDULING PLACEMENT QUESTION

Yes 

## Maintenance of Placement Questions

- If a placement question is modified:
  - The **associated rotation(s) must be rebuilt and validated.**
  - The system requires admin review before the schedule can be republished.

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## Schedule Version Management

Each schedule version provides tools for full lifecycle management:

- **Edit Rotation** – Modify rotation details.
- **Edit Exclusion** – Adjust exclusion rules.

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- **Delete** – Remove drafts that are no longer needed.
- **Clone** – Duplicate an existing schedule version for updates or variations.
- **Publish** – Finalize and deploy the schedule.

## Publishing Behavior

- Once published, schedules propagate to:
  - **Evaluation Due Report**
  - **Upcoming section**
  - **Schedule Validation Tab** (for review of generated due dates).
- To make further edits:
  - Clone the published version.
  - Apply changes.
  - Publish the updated version.
- Historical versions remain archived for audit and reporting.

## Scheduling Validation Tab

### Purpose of the Enhancement

The **Scheduling Validation Tab** provides users with a centralized, streamlined workspace for **reviewing, validating, and adjusting evaluation schedules** during the evaluation configuration process. The tab is automatically available for every evaluation where a scheduling pattern has been **assigned** or **updated**.

The screenshot shows the 'Schedule Validation' tab with a table of resident enrollment data. The table has columns for Resident Name, Unit, Status, Due Date, and Actions. The 'Status' column uses color-coded labels: 'ENROLLED' in green and 'PAST DUE' in red. The 'Actions' column contains buttons for 'Update Due Date' and 'View Evaluations'.

| Resident Name 1 ↑  | Unit | Status   | Due Date 2 ↑ | Actions                           |
|--------------------|------|----------|--------------|-----------------------------------|
| > Holzworth, Katie | 02   | ENROLLED | 1/13/2026    | Update Due Date  View Evaluations |
| > Houist, Minnie   | 20   | ENROLLED | 7/9/2026     | Update Due Date  View Evaluations |
| > Jacobson, Janice | 18   | PAST DUE | 12/4/2024    | Update Due Date  View Evaluations |
| > James, Jesse     | 04   | PAST DUE | 9/7/2025     | Update Due Date  View Evaluations |
| > Jones, Oscar     | 13   | ENROLLED | 8/11/2026    | Update Due Date  View Evaluations |

## Displayed Columns



# NEXT Release Notes

Each row in the Scheduling Validation Tab provides structured visibility into the resident's scheduling status. Columns include:

- **Resident Name** – Full resident name for quick identification.
  - **Resident Unit Number** – Identifies the resident's unit.
  - **Status** – Status of enrollment for the resident's evaluation.
    - **Enrolled** – scheduled but not due.
    - **Past Due** – scheduled, past due.
    - **Not Enrolled** – excluded based on exclusions or placement question needing to be answered.
  - **Due Date** – The system-generated date based on scheduling rules.
  - **Actions**
    - **View Evaluation** – Will open to the Evaluation area of the Resident Profile.
    - **Update Due Date** – Will allow user to update Due Date and assign rotation/step.
- 

## Key Features

### Review and Override Suggested Scheduling

- Users are presented with **system-generated due dates and rotation steps** derived from the assigned scheduling pattern.
- If the generated due date is incorrect or needs to be adjusted, the user can:
  - Select **Update Due Date**.
  - Enter the corrected date.
  - Assign the appropriate **Rotation Step** that the new due date fulfills.



# NEXT Release Notes

**Enroll Resident**

Resident: Larson, Mike      Evaluation: Level of Care

Due Date: 07/10/2025 

Rotation: lc

Step: 365 days after Last Evaluation

[Cancel](#)   [Save](#)

- **Guardrails:** Overrides must still align with evaluation logic and require a step assignment, preventing incomplete configurations.

---

## Placement Questions (Conditional)

- For evaluations that use **placement questions** to determine schedule rotations:
  - The relevant placement questions are presented directly in the Scheduling Validation Tab.
  - The user must select an answer (e.g., Yes/No, Single Select).
  - Once answered, the system enables the user to:
    - Update the due date.
    - Assign the correct rotation step tied to that placement answer.

**Enroll Resident**

Resident: Anderson, Donna      Evaluation: Pet Safety Eval

Due Date: 02/25/2026 

Rotation: yes

Step: 365 days after Last Evaluation

[Cancel](#)   [Save](#)

# NEXT Release Notes

- **Safeguard:** If placement questions are unanswered, the resident remains in an “Not Enrolled” state until validation is complete.
  - Due Date can be updated from the scheduling validation tab and rotation assigned OR the evaluation can be completed on the resident's record.

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## Historical Reference Data

- To aid decision-making, the tab includes a **historical view of up to the last four signed completed evaluations** of the same type for that resident.
- Historical evaluations are:
  - **Read-only** (no edits allowed).
  - **Collapsed** under the primary evaluation row by default.
  - Expandable to show details including:
    - Step
    - Due Date
    - Completion Date

The screenshot displays a user interface for a resident named Joseph Larson. At the top, there is a header with the resident's name, a tab identifier '10 - A', a 'PAST DUE' status indicator, and a date '5/23/2025'. On the right side of the header, there are two buttons: 'View Evaluations' and 'Update Due Date'. Below the header is a table with the following columns: Step, Due Date, Completed Date, Status, and Actions. The table contains two rows of data:

| Step                           | Due Date  | Completed Date | Status    | Actions |
|--------------------------------|-----------|----------------|-----------|---------|
| 1 day after Admission          | 12/2/2023 | 5/23/2024      | COMPLETED |         |
| 365 days after Last Evaluation | 5/23/2025 |                | PAST DUE  |         |

- **Benefit:** Allows users to compare past completion intervals and validate whether the suggested due date aligns with historical practice.

---

## Impact of Updates

When changes are made within the Scheduling Validation Tab, they are automatically propagated across the system.

- **Resident Chart:** Updated due dates populate in the **Upcoming Section** for the resident.
- **Evaluation Due Report:** Updates feed into the global reporting tool used for tracking upcoming, overdue, and due evaluations.

# NEXT Release Notes

## Evaluation Due Report Enhancements

The **Evaluation Due Report** provides clinical providers and leadership with a comprehensive view of resident evaluations that are **due, overdue, or upcoming** at their facilities. This tool ensures accountability, helps maintain compliance with evaluation schedules, and supports timely clinical oversight of resident progress.

### Key Enhancements

#### Improved User Experience

- **Column Rearrangement:** Users can now rearrange report columns to prioritize the information most relevant to their workflow.
- **Sorting Options:** Sorting is now supported on **Name, Title, Frequency, and Due Date** for quicker navigation and reporting accuracy.
- **Filtering Options:** Flexible filtering is available both from the **column headers** and the **side bar filter panel**, with filters supported on:
  - Name
  - Title
  - Frequency
  - Due Date
  - Status

| Name ↑                                      | Title                                     | Frequency                      | Due Date   | Status   | Actions |
|---|---|--------------------------------|------------|----------|---------|
| Anderson, Donna<br>20<br>Independent Living | Red Door Elopement<br>Other Evaluation    | 90 days after Last Evaluation  | 09/08/2025 | Past Due | ⋮       |
| Anderson, Donna<br>20<br>Independent Living | Elopement Risk<br>Risk Evaluation         | 365 days after Last Evaluation | 05/22/2026 | Upcoming | ⋮       |
| Anderson, Donna<br>20<br>Independent Living | Fall Risk<br>Risk Evaluation              | 365 days after Last Evaluation | 07/10/2025 | Past Due | ⋮       |
| Anderson, Donna<br>20<br>Independent Living | Level of Care<br>Level of Care Evaluation | 365 days after Last Evaluation | 03/28/2026 | Upcoming | ⋮       |

### Enhanced Actions

- **Open Evaluation:** Selecting this action takes the user directly into the **Evaluation section of the resident's chart**, streamlining follow-up and documentation.
- **Update Due Date:** Users can adjust evaluation schedules directly through a modal window.
  - The modal allows entry of a corrected **next due date**.
  - For evaluations tied to a **specific rotation**, users can also set the appropriate **step** that aligns with the resident's schedule.

#### Enroll Resident

|                               |                    |
|-------------------------------|--------------------|
| Resident:                     | Evaluation:        |
| Donna Anderson                | Red Door Elopement |
| Due Date                      |                    |
| 09/08/2025                    |                    |
| Rotation                      |                    |
| Default Rotation              |                    |
| Step                          |                    |
| 90 days after Last Evaluation |                    |

Cancel Save

### Scheduling Logic

# NEXT Release Notes

- Only evaluations that have **associated schedules** will appear in the Evaluation Due Report.
- If an evaluation has **multiple rotation schedules**, users will be prompted with a **placement question** to assign the resident correctly.
  - Until answered, the resident appears in the report with:
    - **Status:** *Not Enrolled*
    - **Frequency:** *Placement question not answered*
  - From here, users can:
    - **Complete the evaluation**, after which the schedule is assigned based on the placement response.
    - **Update the due date**, where the user will select both the **rotation** and the **step** the evaluation fulfills.

---

## Pagination and Display Controls

- Users can now choose the **number of evaluations displayed per screen**.
- Pagination controls make it easier to navigate larger data sets without performance degradation.

## Evaluation Printing

### Purpose of the Enhancement

Two key improvements have been made to streamline usability and increase the informational value of printed evaluation forms:

1. **Blank Evaluation UI Improvements** – redesigned layouts for efficiency and readability.
2. **Print Evaluations with Suggested Services** – new capability to include or exclude suggested services on printed forms.

---

## Key Enhancements

### Blank Evaluation UI Improvements – Clinical Configuration Evaluation

- **Reduced White Space**
  - The printed layout has been condensed to minimize unnecessary spacing.
  - More content is visible per page, significantly reducing page count.
- **Multi-Column Formatting**
  - Where appropriate, questions and answer fields are arranged in columns.
  - Enhances efficiency, especially for shorter-answer question types.
- **Compressed Headers & Footers**
  - Margins and spacing reduced to maximize space utilization.

---

### Print Evaluations with Suggested Services

- **New Inclusion Option**
  - Printed evaluations can now include **Suggested Services** linked to evaluation questions or sections.
  - Appears in-line with related content, offering context and reference for care planning.
- **Service Setting**

# NEXT Release Notes

- Users can select whether to **include or exclude suggested services** at print time.
- Provides flexibility depending on the use case:
  - **With Services** → for audits, compliance reviews, and implementation testing.
  - **Without Services** → for blank field-based evaluation completion in the field.

Level of Care  
Name: \_\_\_\_\_  
DOB: \_\_\_\_\_ Sex: \_\_\_\_\_ Unit: \_\_\_\_\_

Red Door House  
123 Sunset Ave  
Willmar, MN 89653  
Phone: (612) 351-5711  
Fax: (612) 986-3654

Level of Care 6 Questions  
Completed by \_\_\_\_\_ on \_\_\_\_\_  
Max Score: 17  
Resident's Score: \_\_\_\_\_

**Behavior** Section Score: \_\_\_\_\_ pts  
Identify behavior needs:

**Wandering (1 pts)**  **Redirection (2 pts)**  **Verbally inappropriate (3 pts)**

**Transfer** Section Score: \_\_\_\_\_ pts  
Identify Transfer Need:

**Independent (1 pts)**  **Assist of One (2 pts)**

**Bathing** Section Score: \_\_\_\_\_ pts  
Identify bathing need:

**Bathing Independent**  **Bathing Assist of 1 (1 pts)**  **Bathing: Assist 2 (2 pts)**

**Placement** Section Score: \_\_\_\_\_ pts  
Where does the resident reside?

**MC**  **AL**

**Additional Assistance** Section Score: \_\_\_\_\_ pts  
Points

**1 (1 pts)**  **2 (2 pts)**  **3 (3 pts)**  **5 (5 pts)**

**Activities** Section Score: \_\_\_\_\_ pts  
Does the resident need reminder to activities?

**YES (5 pts)**  **NO**

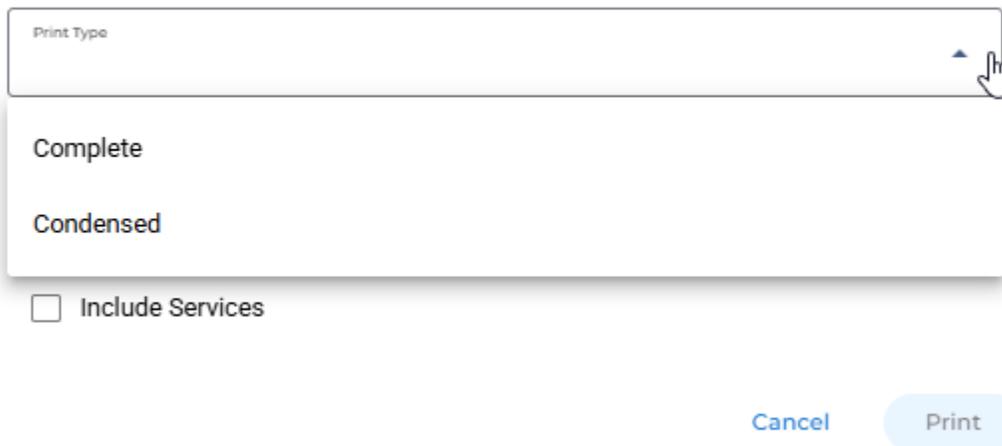
Printing evaluations directly from the resident record is essential for **clinical workflow support, survey readiness, and compliance documentation**. Two major improvements have been introduced:

1. **Evaluation UI Improvements** : A redesigned evaluation layout for efficiency and usability.
2. **Completed Evaluation Print Options**: New choices for printing either a complete or condensed version of completed evaluations.
3. **Print Evaluations with Suggested Services** – new capability to include or exclude suggested services on printed forms.



# NEXT Release Notes

## Print Evaluation



Print Type

Complete

Condensed

Include Services

Cancel Print

---

## Key Enhancements

### Evaluation UI Improvements

Enhancements were made to the way **evaluations** print from within a resident's record:

- **Reduced White Space**
  - Layout optimized to minimize excess spacing, leading to shorter, more efficient printouts.
- **Multi-Column Formatting**
  - Where appropriate, multi-column layouts are applied (e.g., checkboxes, short answers).
  - Increases information density per page while maintaining legibility.
- **Compressed Headers and Footers**
  - Required details such as **evaluation titles, resident info, and page numbers** remain intact.
  - Extra spacing in headers/footers reduced for print efficiency.

---

### Print Options for Completed Evaluations

Users can now select **how completed evaluations are printed**, depending on the purpose:

- **Complete Version**
  - Displays the entire evaluation:
    - All questions.
    - All available answer choices.
    - Resident's selected answers highlighted.
  - **Use Case:** Audit reviews, training, or detailed compliance documentation.

# NEXT Release Notes



Red Door House Level of Care (copy)  
**Donna Anderson**  
DOB: 07/24/1933 · Sex: FEMALE · Unit: 20

Red Door House  
123 Sunset Ave  
Willmar, MN 89653  
Phone: (612) 351-5711  
Fax: (612) 986-3654  
Max Score: 14  
Donna's Score: 6

## Red Door House Level of Care (copy) 9 Questions

Completed by Myriah Kern on 09/10/2025 12:39 AM

### Residence Section Score: 0 pts

The Assessment is completed for a Resident who will reside or resides in:

**AL**

### Reason For Evaluation Section Score: 0 pts

Indicate the reason for the assessment:

- Pre-assessment  Move-In Assessment  **30 Day Assessment**  90 Day Assessment  180 Day Assessment  
 365 Day Assessment

### Functional Capabilities Section Score: 4 pts

Indicate level of assistance needed for ambulation/mobility:

- Independent  **Needs/receives set-up assistance for ambulation (1 pts)**  
 Needs/receives verbal cueing/standby for ambulation (2 pts)  Needs/receives physical assist of 1 for ambulation (3 pts)  
 Needs/receives physical assist of 2 for ambulation (4 pts)

Indicate level of assistance needed for bathing:

- Independent  **Needs/receives verbal cueing/standby during bathing (1 pts)**  
 Needs/receives physical assist of 1 during bathing (2 pts)  Needs/receives physical assist of 2 during bathing (3 pts)

## • Condensed Version

- Displays a streamlined evaluation:
  - Only the **questions asked**.
  - Only the **answers selected** by the resident or staff.
- **Use Case:** Quick reference in care planning meetings, offsite reviews, or when reducing page count is a priority.

### Functional Capabilities

Indicate level of assistance needed for ambulation/mobility:

Needs/receives set-up assistance for ambulation (1 pts)

Indicate level of assistance needed for bathing:

Needs/receives verbal cueing/standby during bathing (1 pts)

Indicate level of assistance needed for toileting and/or continence care:

Needs/receives cueing/standby for toileting and/or continence care (2 pts)

## • User Control

- At print time, users choose **Complete** or **Condensed** output, tailoring the printout to their workflow.

# NEXT Release Notes

## Print Evaluation

Print Type

Complete

Condensed

Include Services

Cancel

Print

## Print Evaluations with Suggested Services

### • New Inclusion Option

- Printed evaluations can now **Include Services** linked to evaluation questions or sections.
- Appears in-line with related content, offering context and reference for care planning.

Indicate level of assistance needed for bathing:

Needs/receives verbal cueing/standby during bathing (1 pts)

Services: Bathing: Cueing/Standby

Indicate level of assistance needed for bathing:

Independent  Needs/receives verbal cueing/standby during bathing (1 pts)

Service: Bathing: Cueing/Standby

Needs/receives physical assist of 1 during bathing (2 pts)  Needs/receives physical assist of 2 during bathing (3 pts)

## Enhancements to Resident > Evaluations

### Purpose of the Enhancement

The **Resident > Evaluations** area has been enhanced to simplify visibility of upcoming evaluations, provide greater control overdue dates and rotations, and improve transparency of scoring within evaluations. These updates are designed to reduce administrative burden, enhance clinical oversight, and ensure accurate scoring and scheduling alignment.

## Key Enhancements

### Upcoming Section Simplification

# NEXT Release Notes

The **Upcoming** section has been streamlined to clearly display only the most relevant information for due evaluations:

- **Due Date:** Displays the next scheduled due date for the evaluation.
  - Includes an **overdue indicator** if the evaluation is past due.
  - Shows the **number of days overdue** for clarity.
- **Evaluation Title:** The name of the evaluation that is due.
- **Frequency Fulfilled:** Indicates which frequency/step in the schedule the due evaluation will satisfy.
- **Actions Column:**
  - **Open Evaluation** – Opens the evaluation for completion.
  - **Update Due Date** – Opens a modal for adjusting the evaluation's due date.

| Due Date   | Title                        | Frequency  |
|--|------------------------------|--|
| 02/22/2025    | Elopement Risk               | 1 day after Admission and no repeat (199 days overdue)                  |
| 02/22/2025   | Test Schedule                | 1 day after Admission and no repeat (199 days overdue)                 |
| 02/22/2025  | Red Door House Level of Care | 1 day after Admission and no repeat (199 days overdue)                |
| 02/22/2025  | First Light Evaluation       | 1 day after Admission and no repeat (199 days overdue)                |
| 05/21/2025  | Medication                   | 1 day after Admission or Care Start and no repeat (111 days overdue)  |

## Update Due Date Modal Enhancements

The **Update Due Date modal** has been expanded to provide greater scheduling control:

- **New Due Date:** Users can enter the updated due date.
- **Rotation Selection:**
  - If the evaluation has **a single rotation**, the system applies the due date to the correct step automatically.
  - If the evaluation has **multiple rotations**, the user must:
    - Select the correct **rotation**.
    - Choose the **step** that the new due date will fulfill.

# NEXT Release Notes

## Enroll Resident

Resident:  
Houston Holly

Evaluation:  
First Light Evaluation

Due Date  
02/22/2025 

Rotation  
Default Rotation 

Step  
1 day after Admission 

[Cancel](#) [Save](#)

## Evaluation Section Scoring Enhancements

Within each evaluation, section headers have been updated to improve transparency and precision of scoring:

- **Section Total Score:** Each section now displays its own cumulative score.



The screenshot shows the 'Red Door House Level of Care' evaluation interface. At the top, it displays 'Score: 7.00' and 'Care Level 2'. Below this are tabs for 'QUESTIONS', 'SERVICE PLAN', 'PLAN OF CARE', and 'ACTIVITY'. The main content area lists several sections with their respective question counts and total points:

| Section                                   | Questions       | Total Points                |
|---|-----------------|-----------------------------|
| Residence                                 | 1 / 1 Question  | 0 Total Points              |
| Reason for Evaluation                     | 1 / 1 Question  | 0 Total Points              |
| Functional Capabilities                   | 3 / 3 Questions | 5 Total Points              |
| Nurse Care Management Services            | 1 / 1 Question  | 0 Total Points              |
| Housekeeping, Laundry, and Bed Making     | 2 / 2 Questions | 0 Max Score, 6 Total Points |
| Outside Provider: Home Health and Hospice | 1 / 1 Question  | 2 Total Points              |

- **Max Score Visibility:** If a Max Score has been defined for the section, it is displayed on the header.
- **Zero Max Score Logic:**
  - If **Max Score = 0**, the section contributes **0 points** to the **overall total score**.

# NEXT Release Notes

- This allows the section score to be displayed for **informational purposes only** without impacting the resident's cumulative evaluation score.

Housekeeping, Laundry, and Bed Making ▾

2 / 2 Questions 0 Max Score 6 Total Points

- **Use Case Example:** Risk-specific sub-evaluations (e.g., *Fall Risk* or *Elopement Risk*) can show their individual scores without influencing the total Level of Care score.

## Service Plan Listing Enhancement

### Service Listing Screen Enhancements

The **Service Listing Screens** in both the **Resident Record** and the **Evaluation (Evaluation > Service Plan)** areas have been enhanced to improve **visibility, sorting, and usability**. These updates ensure staff can quickly identify when services begin, sort services for review, and work within a more responsive interface.

---

### Key Enhancements

#### New Start Date Column

- A **Start Date** column has been added to the service listing screens.
- Provides immediate visibility into when each service begins, improving **service planning oversight, billing preparation, and compliance tracking**.
- Applies to:
  - **Evaluation > Service Plan (Medical Evaluation screen)**
  - **Resident > Service > Service Plan (Resident Record)**

---

### Sorting Functionality

- Users can now **sort several columns** in the service listing screen.
- Sorting and filtering are flexible and applies to:
  - Service Name (default sort order)
  - Start Date (new column)
  - Role
  - Duration
  - Status
- Enhances the ability to:
  - Quickly locate recent or upcoming services.
  - Organize listings alphabetically or chronologically.



# NEXT Release Notes

← Evaluations

Red Door House Level of Care Autosaved [Finalize](#) [Actions](#) ↓

Score: 7.00 Care Level 2 Signed Completed by Myriah Kern RN on 09/09/2025 07:40 PM

QUESTIONS SERVICE PLAN PLAN OF CARE ACTIVITY

| Start Date | Service Name                     | Role      | Schedule          | Duration | Status  | Actions |
|------------|----------------------------------|-----------|-------------------|----------|---------|---------|
| 1/13/2025  | Weight Check                     | Caregiver | Daily 06:00 PM    | 0        | Current | ⋮       |
| 5/31/2024  | Ambulation: Cueing/Standby       | Caregiver | Daily PM, AM, NOC | 5        | Current | ⋮       |
| 8/20/2024  | Ambulation: Independent          | Nurse     | Daily NOC, PM, AM | 0        | Current | ⚠ ⋮     |
| 5/3/2024   | Behavior: Verbally inappropriate | Caregiver | Daily PM, AM      | 10       | Current | ⋮       |
| 3/28/2025  | Bathing: Assist 1                | Caregiver |                   | 30       | Current | ⚠ ⋮     |

Page Size: 50 1 to 32 of 32 Page 1 of 1

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Service Plan [Actions](#) ↓ [New](#)

Care Level 2 7.00 hours/month Last Assessment: 09/09/2025

ACTIVE ALL SERVICES

| Start Date | Service Name                     | Role      | Schedule          | Duration | Status  | Actions |
|------------|----------------------------------|-----------|-------------------|----------|---------|---------|
| 1/13/2025  | Weight Check                     | Caregiver | Daily 06:00 PM    | 0        | Current | ⋮       |
| 5/31/2024  | Ambulation: Cueing/Standby       | Caregiver | Daily PM, AM, NOC | 5        | Current | ⋮       |
| 8/20/2024  | Ambulation: Independent          | Nurse     | Daily NOC, PM, AM | 0        | Current | ⚠ ⋮     |
| 5/3/2024   | Behavior: Verbally inappropriate | Caregiver | Daily PM, AM      | 10       | Current | ⋮       |
| 3/28/2025  | Bathing: Assist 1                | Caregiver |                   | 30       | Current | ⚠ ⋮     |

Page Size: 50 1 to 32 of 32 Page 1 of 1

## Housing Occupancy Enhancements

The **Housing > Occupancy** section within the resident profile has been enhanced to improve accuracy, visibility, and usability for clinical users. These changes address previous limitations where unit records could only be updated during admission or transfer events, making it harder to maintain accurate housing records.

With these updates, clinical staff can now **edit, view, and manage unit history directly**, with changes syncing across systems for consistency.

## Key Enhancements

### Edit Unit Records in Clinical Unit History

- **Direct Editing Enabled**
  - Users can now edit **unit records** directly in the Clinical Unit History section.
  - Improves accuracy by allowing corrections and adjustments without requiring an admission or transfer event.
  - This can be completed by selecting the unit from the Occupancy Unit History Grid.

# NEXT Release Notes

- **Real-Time Syncing with EMAR**

- Any updates made to unit history records will **synchronize with EMAR**.
- Ensures that resident housing data remains consistent across platforms.
- Applies regardless of event type (not limited to admissions or transfers).

## Updated Occupancy Detail Page – Grid View

- **Transition from Cards to Table View**

- The Unit History previously displayed as individual cards is now presented in a **grid/table view**.
- Provides clearer visibility of unit assignment timelines, dates, and details in a structured format.

- **Contextual Page Updates**

- The occupancy detail page dynamically adjusts based on whether the resident:
  - Is currently occupying a unit.
  - Has no current unit assignment.

| Unit | Start               | End                 | Transfer |
|------|---------------------|---------------------|----------|
| 20   | 09/05/2025 12:47 PM |                     | Yes      |
| 15   | 01/13/2025 05:04 PM | 09/05/2025 12:47 PM | Yes      |
| 03   | 02/01/2024 01:59 PM | 01/13/2025 05:04 PM | Yes      |

## Clinical Enhancements

### Resident Notes – Increased Character Limit

- **New Character Limit:**

# NEXT Release Notes

- The maximum allowable length for Resident Free Form Notes has been increased to **65,000 characters** (previously 5,000).
  - **Dynamic Text Field Behavior:**
    - The note entry box **expands automatically** as users type.
    - For long entries, a **scrollbar** appears for easy navigation.
  - **Use Case Examples:**
    - Billing documentation requiring long narratives.
    - Comprehensive compliance notes or care history summaries.
  - **Benefit:** Ensures no clinical or billing documentation is truncated and allows single, consolidated entries instead of splitting across multiple notes.
- 

## Resident List – Community Custom Fields in Resident Grid

- **Community Custom Fields Added:**
    - Resident List now supports **community-specific custom fields** as selectable columns.
  - **Filtering Enhancements:**
    - Users can **filter** based on these custom fields.
    - Improves ability to tailor resident lists to community-specific reporting needs.
  - **Benefit:** Supports **community-level customization** while giving providers and administrators more flexibility to sort, filter, and manage resident data.
- 

## Evaluations – Area of Focus Effective Date Defaults

- **Default Behavior Updated:**
  - When adding an **Area of Focus** or **Expected Outcome**, the **Effective Date** now defaults to the **current system date**.
- **Override Option:**
  - Users may still manually change the Effective Date if necessary.
- **Reason for Change:**
  - Previously, effective dates defaulted to the **Service Start Date**, leading to inconsistencies and incorrect timelines.
- **Benefit:**
  - Improves accuracy and consistency in evaluation timelines.
  - Reduces risk of misaligned care plans or reporting errors tied to service start dates.

## State Forms

These updates expand the **State Forms** capabilities within the system to improve compliance with **Kentucky** and **New Hampshire** regulatory reporting requirements. By adding these forms directly into Clinical and Brand configuration workflows, the system now supports **direct access, printing, and data alignment** with finalized evaluations.

---

## Key Enhancements

### KY Resident Census and Condition Report

#### New Card in Clinical > State Forms

- A new **KY Resident Census and Condition Report card** has been added to **Clinical > State Forms**.

# NEXT Release Notes

- Access is controlled by a **Launch Darkly flag**, enabling phased rollout and visibility only for applicable evaluations/communities.
- Clicking the card opens a **modal window** where users can:
  - Select a **survey date**.
  - Print the form filtered to residents relevant to that date.

## Printed Report

- A hard copy version of the **KY Resident Census and Condition Report** has been implemented to meet state compliance requirements.
- Report behavior:
  - Includes **all active residents**.
  - Excludes residents on **Leave of Absence (LOA)**.
  - Pulls information from the **last finalized evaluation** for each resident prior to the selected survey date.
- **Benefit:** Provides a complete, survey-ready snapshot of resident census and condition details in alignment with Kentucky state regulations.

---

## Resident Assessment Tool / Needs Determination (NH)

### Import into Brand State Forms

- The **Resident Assessment Tool / Needs Determination (NH)** has been imported into the Brand's State Forms library.
- Ensures compliance with **New Hampshire state regulations** for assessment and needs determination.

## Clinical Fixes

The following fixes have been implemented to improve stability, accuracy, and usability across Clinical workflows.

---

### Evaluations Due Report – Data Not Populating

- **Issue:** The **Evaluations Due Report** was not displaying upcoming evaluations even when correctly configured. Clearing filters would result in no data appearing.
- **Resolution:** Adjustments were made to ensure evaluation schedules consistently populate in the report, even when filters are cleared.
- **Impact:** Clinical providers and leadership can now reliably use the Evaluations Due Report to track due and upcoming evaluations.

---

### Service Plan – Interval Names Not Updating

- **Issue:** Updates to **Service Interval names and times** were not reflected on the **Resident Service Plan listing** unless "Update Schedule" was selected.
- **Resolution:** Interval updates now flow automatically into the Service Plan listing without requiring additional steps.
- **Impact:** Reduces manual effort and ensures service plans display the most accurate scheduling information across environments.

# NEXT Release Notes

## Clinical Notes – Special Characters Not Printing

- **Issue:** Special characters (e.g., &, é, <, >) were not displaying correctly on **printed notes** from the Clinical > Medical > Notes section.
  - **Resolution:** Printing logic was updated to correctly render special characters.
  - **Impact:** Printed notes now match on-screen documentation, supporting compliance and accurate resident recordkeeping.
- 

## Global Special Character Fix

- **Issue:** Special characters were inconsistently displayed across the system, with manual corrections in some areas but no global resolution.
  - **Resolution:** A **system-wide encoding fix** was implemented to ensure special characters display consistently across all modules.
  - **Impact:** Improves reliability of text entry, display, and reporting throughout the application.
- 

## Occupancy End Date – Unable to Save

- **Issue:** Users were unable to enter or save an **Occupancy End Date** unless it was auto populated via discharge.
  - **Resolution:** The Occupancy End Date field has been set to **read-only**. Updates now occur automatically based on the discharge date, which also updates the end date/time.
  - **Impact:** Ensures accuracy in occupancy records while reducing the risk of manual entry errors.
- 

## Daily Cares – Declined Services Still Displaying

- **Issue:** Declined resident care services continued to appear in **daily cares**, causing confusion for staff.
  - **Resolution:** Logic was corrected so that declined services are fully removed from daily cares once declined.
  - **Impact:** Daily cares now display only active services, improving clarity for care staff.
- 

## Notes Field – Extra Characters Appearing

- **Issue:** Extra characters were being added to notes when using **apostrophes** in certain environments.
  - **Resolution:** Encoding was corrected to ensure notes save exactly as entered. Prior hotfixes were confirmed and included in this release for stability.
  - **Impact:** Notes now display as expected, improving accuracy and professionalism of clinical documentation.
- 

## Service Plan Impacting Evaluations

- **Issue:** Editing a **Service Plan** could occasionally modify evaluation dates and scores. This was not reproducible in staging or UAT, complicating resolution.
  - **Resolution:** Safeguards were applied to prevent unintended changes.
  - **Impact:** Protects the integrity of evaluation data while longer-term improvements are designed and implemented.
- 



# NEXT Release Notes

## CRM Fixes

### Red Error Alert When Selecting Pipeline

- **Issue:** Users encountered a **red error alert** when accessing the **Pipeline feature** in CRM. The issue also impacted the **Prospect record activity tab** and prevented smooth navigation.
- **Cause:** The issue was that an emoji in the sales stage description broke the loading of the sales stage.
- **Resolution:** A fix was applied to correct the issue with special characters.
- **Impact:**
  - Users can now access the Pipeline feature without error alerts.
  - Prospect record activity tabs display correctly.
  - Sales stage configuration is stabilized, ensuring smoother CRM operations.

## Cloud Enhancements

### Document Filtering and Selection Stability

- **Issue:** Users experienced difficulty maintaining filters when working with documents in the cloud. Filters would reset during selection, and previously selected documents would sometimes disappear from view.
- **Resolution:** Enhancements were made to **persist filter states** across document interactions. Selected documents now remain visible and accessible even after filter adjustments.
- **Impact:**
  - Users can apply filters once and continue working without repetitive resets.
  - Document selection is stable, reducing frustration and lost progress.
  - Improves efficiency for staff working with large document sets.

## EMAR

### Suite RX Pharmacy Integration

We have expanded our pharmacy integration capabilities to include pharmacies that use **SuiteRX**. This integration strengthens our commitment to providing seamless connectivity between EMAR and pharmacy partners, reducing manual work and improving medication management accuracy.

---

### Key Details

- **New Integration Added:** Support for pharmacies operating on the **SuiteRX** platform.
- **Integration Benefits:**
  - Automated transmission of medication orders between EMAR and the SuiteRX pharmacy system.
  - Reduced manual data entry for clinical teams.
  - Improved accuracy in medication lists and order updates.
  - Faster reconciliation of new and updated orders.



# NEXT Release Notes

- **Availability:** Enabled for communities partnered with pharmacies running on SuiteRX.

## Receive Orders > Show multiple Potential Duplicate matches if they exist

This enhancement improves order management in EMAR by expanding the **Potential Duplicate** logic. Clinical users can now see **all possible duplicate matches** when receiving a new order, ensuring better decision-making around whether to edit, keep, or replace active orders.

Potential Duplicate(s) 4: Acetaminophen - 03/12/2025 00:00

TABLET(325 MG)  
DIN : 00538132701

Route: PO

MAR

## Key Enhancements

### Potential Duplicate Detection

- When an **incoming order** is flagged as a potential duplicate, the system will now display **all matching active orders** from the resident's medication profile.
- Matching orders are presented in a drop-down list with key details:
  - **Medication Name**
  - **Order Start Date** (MM/DD/YYYY with timestamp).

Potential Duplicate(s) 4: Acetaminophen - 03/12/2025 00:00

TABLET(325 MG)  
DIN : 00538132701  
Rx : ATM480  
FON : ATM480  
:4 hours.

Acetaminophen - 01/26/2024 00:01  
Acetaminophen Extra Strength - 04/09/2024 08:00  
Tylenol Extra Strength - 04/22/2024 15:20  
Acetaminophen - 03/12/2025 00:00

## Visual Indicators

- A **label** is shown next to the Current Order badge, indicating the number of duplicates detected.
- Label format: "*Potential Duplicate(s) [number]*".
- The number of duplicates is displayed in **red** to draw attention.

## User Actions

Users can manage incoming orders against duplicates using three available actions:

- **Edit Order**
  - Opens the edit window for the **incoming order**.
- **Keep Both**
  - Validates the incoming order as **new**, keeping all active matches unchanged.
- **Replace Active Order**
  - User selects which duplicate to replace from the drop-down menu.
  - System prompts for **End Date/Start Date**.
  - The selected existing order is ended, and the new order begins based on the entered dates.

# NEXT Release Notes

Receive Orders > Copy Existing Schedule to New Order

## Purpose of the Enhancement

This enhancement introduces the ability for **Med Managers** to copy an existing medication schedule when replacing or renewing an order. The feature eliminates the need to manually rebuild complex schedules, improving efficiency and reducing the risk of scheduling errors during order replacement scenarios.

### Schedule

Choose Pre-Defined Frequency... ▾ Copy Existing Schedule MAR

Give 1 SOLN Every 1 Day(s) Time 0700 Delete

Starting August 21, 2025 No End Date

Add Give Time Add PRN Show Inactive Schedules

## Copy Existing Schedule

The associated order's existing schedule will be applied to this order. Proceed?

Cancel Proceed

## Key Enhancements

### 1. New 'Copy Existing Schedule' Button

- Added to the **Edit screen** when reviewing orders flagged as *Potential Duplicate* or *Order Details Mismatch (Renew)*.
- Provides users with the ability to copy the schedule from an existing active order directly into the new order.

### 2. Schedule Copy Behavior

- Copies the **entire schedule** of the selected existing order.
- **Start dates** are automatically adjusted to the **current day**.
- For **custom cycles with multiple givetimes**:
  - The earliest give is reset to the current day.
  - All other givetimes are shifted relative to maintain the original repeat pattern.

### 3. Edit After Copying

- Once copied, users remain in **Edit mode** on the new order.
- Options available:
  - **Further edit** the schedule manually.
  - **Save and confirm** the order (existing behavior).
  - **Cancel** to discard changes and return to Receive Orders.

# NEXT Release Notes

## EMAR Fixes

### Physician Order Sheet – Orders Ending Today Not Displayed

- **Issue:** Orders set to end on the current day did not appear on the **Physician Order Sheet**, despite still being active.
- **Resolution:** Adjustments ensure all active orders, including those ending today, are displayed correctly.
- **Impact:** Clinicians can now rely on the Physician Order Sheet to show all valid orders for the day, supporting accurate administration and recordkeeping.

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### Receive Orders – Brand/Generic Names Not Displaying Consistently

- **Issue:** When an order contained both Brand and Generic names, the **confirmation window** did not consistently display names according to user settings.
- **Resolution:** Updates align the display of medication names across all screens with user-selected settings.
- **Impact:** Improves clarity during the order receipt process, reducing confusion between Brand and Generic naming conventions.

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### Alternative Medication Name Not Displaying

- **Issue:** Alternative medication names were not appearing during the **order receiving process**.
- **Resolution:** The display of alternative names was corrected and successfully deployed across multiple environments.
- **Impact:** Ensures clinicians have full visibility of all medication name options during the receiving process, improving safety and accuracy.

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### MAR > Overdue – Residents Displayed Without Medications Scheduled

- **Issue:** Some residents appeared as overdue even though they had no scheduled medications, with PRN medications incorrectly listed as overdue.
- **Resolution:** A targeted data fix corrected the overdue display logic.
- **Impact:** Overdue medications are now displayed accurately, ensuring clinicians can prioritize true overdue administrations.

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### Vitals Not Appearing on MAR Report

- **Issue:** Vital signs collected during medication administration did not appear on the **printed MAR report**, even when medications showed as “Given.”
- **Resolution:** The MAR report was updated to include vitals data linked to medication administration.
- **Impact:** Printed MARs now reflect both medication administration and vital signs, ensuring compliance, clinical accuracy, and complete audit trails.

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### Discontinued Orders – Unable to Release

- **Issue:** Users were unable to release discontinued medications due to the **time selection menu** not populating, and errors occurred when attempting to change release dates.



# NEXT Release Notes

- **Resolution:** Functionality was restored so discontinued medications can be released properly, with time options appearing as expected.
  - **Impact:** Streamlines medication management workflows by ensuring discontinued orders can be finalized without errors.
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## Receive Orders – Checkbox Behavior Updated

- **Issue:** In the **order receiving screen**, the **Alert Medication** checkbox was grayed out while **Psychotropic** and **Mark as Supply** remained clickable even when no order was selected.
  - **Resolution:** All checkboxes now remain **grayed out until an order is selected**. Once selected, all become active and editable.
  - **Impact:** Provides consistent, intuitive behavior for order receiving checkboxes, reducing confusion for users.
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## Supply Orders – Incorrectly Appearing on MAR/TAR Pass

- **Issue:** Orders designated as **Supply** were incorrectly appearing in resident **MAR/TAR passes**, where they should not be displayed.
- **Resolution:** Supply orders are now excluded from MAR/TAR passes.
- **Impact:** Ensures that only scheduled medication and treatment orders appear in passes, maintaining accuracy and reducing noise for clinical staff.

