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SENIOR LIVING SOFTWARE

NEXT Release Notes 2025.10

Release Overview

This release delivers key enhancements across documentation, user visibility, and risk management — each designed to improve efficiency, strengthen data integrity, and give teams clearer insight into daily operations.

From expanded control over **ElderForms** access and workflows, to the introduction of **User Activity Tracking**, and deeper integration between **Risk Management** and **Clinical Notes**, these updates make it easier to manage information securely and consistently across your organization.

Highlights

ElderForms - Brings digital document management and e-signature workflows directly into Eldermark, giving communities a faster, more organized way to handle resident paperwork. It replaces manual, paper-based processes with an integrated system that lets staff send and track forms from a single place. With visibility into signature status and automatic routing, teams can reduce delays, eliminate lost documents, and ensure every required form is completed on time. Built-in permissions and enablement controls keep access secure and aligned to each community's needs. Together, these enhancements simplify daily operations, strengthen compliance, and save valuable staff time across the organization.

User Activity Tracking – Logins – Gain visibility into when users access the system. The first phase of User Activity Tracking introduces a sortable, searchable Logins grid to help administrators monitor engagement, troubleshoot access issues, and support compliance.

Risk Management & Clinical Notes Integration – Strengthen documentation consistency with automatic note creation for incidents and medication events. Linked event and note records, improved navigation, and safeguard rules ensure that resident notes and incident data remain complete, accurate, and aligned.

Each enhancement in this release advances efficiency, accountability, and confidence—helping teams stay informed, connected, and compliant while delivering exceptional resident care.

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ElderForms

Feature Enablement

We've made it easier to manage who can access ElderForms across your organization and communities. Authorized administrators can now turn ElderForms on or off at both the organization and community level, ensuring visibility only where it's been purchased and configured.

Organization-Level Enablement
Brand Implementation Specialists and above can now manage ElderForms availability directly from the Organization view.

Highlights

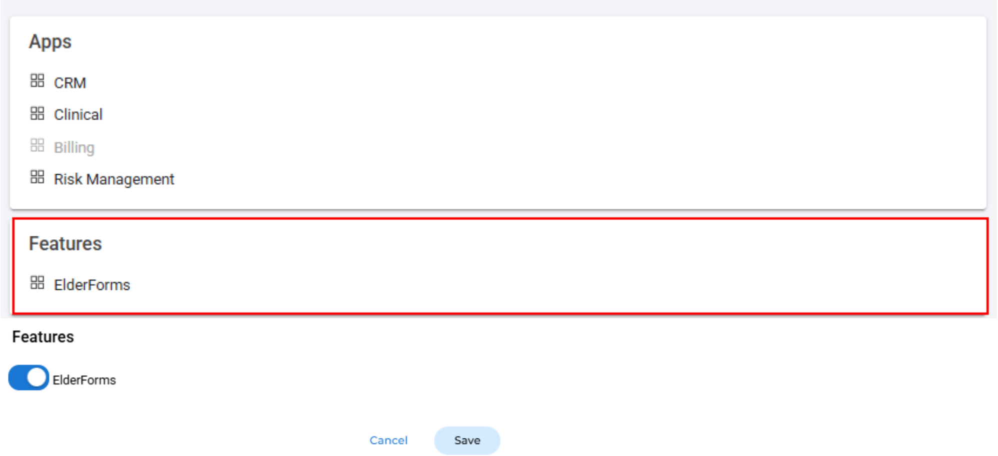
- New **ElderForms** toggle added to the **Community Feature Enablement** area.
- Toggle appears on the **Features** card and in the **Features** modal, following the same layout and behavior as existing feature controls.
- When ElderForms is **disabled**, all related functionality and interface elements are hidden across associated communities.

- When **enabled**, authorized users gain full access to ElderForms features.
- **Save** applies changes, while **Cancel** discards updates.

Community-Level Enablement
At the community level, Brand Implementation Specialists and above can now manage ElderForms access for individual locations.

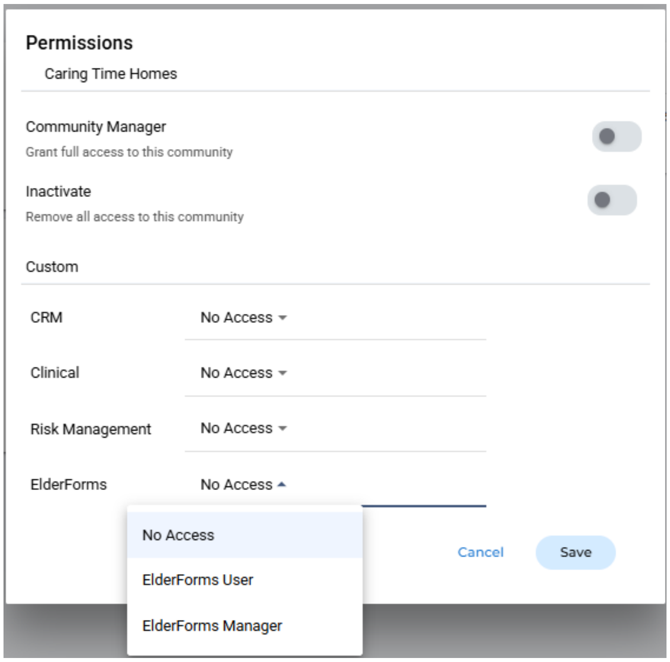
Highlights

- New **ElderForms** toggle added to the **Community Feature Enablement** area.
- Appears on both the **Features** card and **Features** modal, matching existing enablement controls.
- Disabling ElderForms hides all related tools and options for end users within that community.
- Enabling ElderForms restores access for authorized users.
- **Save** confirms updates; **Cancel** discards changes.



Role-Based Permissions

We've introduced new role-based permissions for ElderForms, giving system administrators precise control over who can access, configure, and manage ElderForms documents. These roles align permissions with staff responsibilities—ensuring every team member has the right level of access for their work while maintaining privacy and data security.



ElderForms Manager
Designed for department leaders and administrators who oversee ElderForms setup and document workflows.

Access Includes:

- Full control over **Community Configuration** settings
- Ability to **view, create, print, and delete** ElderForms under **Resident > Documents**
- Complete administrative access to all ElderForms features

ElderForms User
Built for front-line staff who work directly with residents' documents.

Access Includes:

- Ability to **view, create, and print** ElderForms under **Resident > Documents**
- Ability to **delete their own drafts**
- No access to Community Configuration or other users' drafts

No Access
Ideal for users who do not need ElderForms functionality. This role keeps ElderForms hidden to protect resident data and maintain compliance.

Access Includes:

- No visibility into ElderForms or related settings
- ElderForms hidden from:

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  - Community Configuration
  - Resident record → Documents tab

Default Access

- **Org Admins** and **Community Managers** automatically receive **ElderForms Manager** permissions.
- All other users must be explicitly assigned to **ElderForms User** or **Manager** roles to access the feature.
- Users without assigned access remain in **No Access** mode, with all ElderForms areas hidden.

Community Access

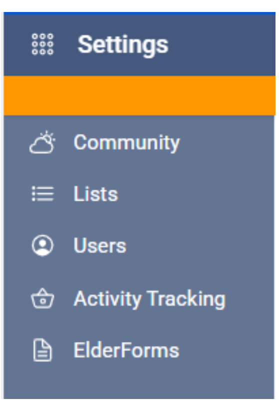
We've made it possible for authorized users to access and manage ElderForms directly from the **Community Settings** menu. A new **ElderForms** option now appears in the left-hand navigation, giving qualified users quick access to configuration.

Highlights

- Added a new **ElderForms** menu item under **Settings > Community**.
- The menu appears only when:
  - The ElderForms feature is **enabled** for that community.
  - The logged-in user has the necessary **role permissions**.
- Selecting **ElderForms** opens the document and packet management interface.

Access Control

- **Visible To:** ElderForms Managers, Org Admins, and Community Managers
- **Hidden From:** All other users
- **Disabled When:** ElderForms is not enabled in the community configuration



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ElderForms Configuration

We're introducing the new **ElderForms Configuration Page** — a centralized hub where authorized users can easily manage both document packets and stand-alone ElderForms.

Highlights

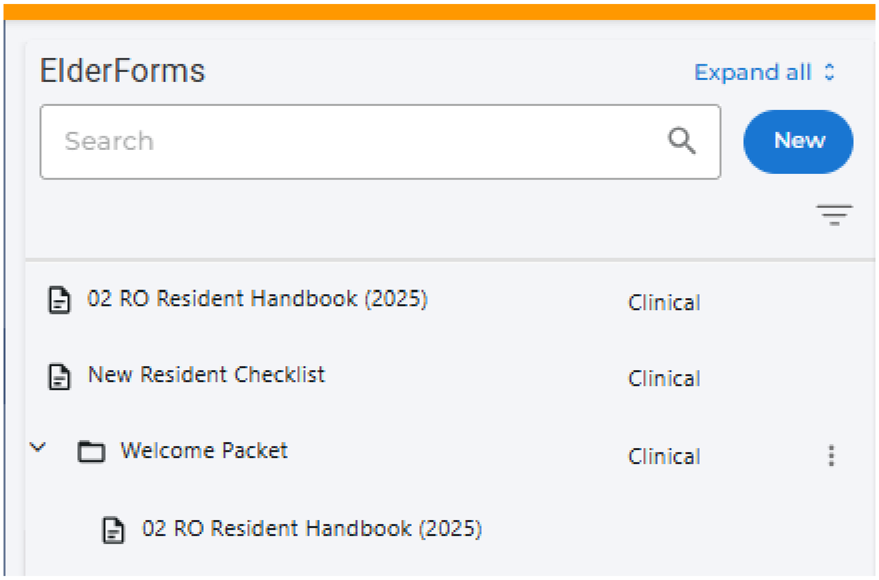
- Unified view combining **document packets** and **stand-alone documents**
- Dynamic interface with **filters, search, and sorting** for quick document management

Navigation:
Settings → Community → **ElderForms**

Feature Overview

Document Listing Panel (Left Side)

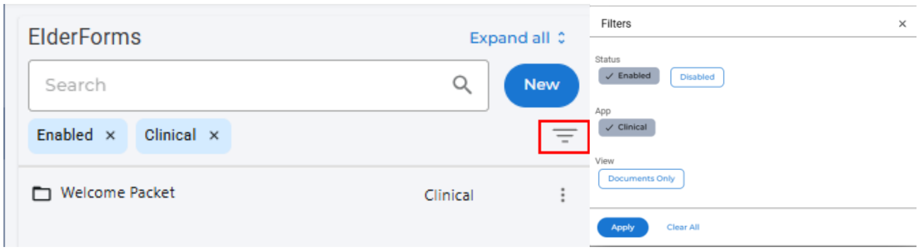
- Displays both **packets** (expandable) and **stand-alone documents**
- Default sort order:
    1. Stand-alone documents (alphabetically)
    2. Packets (alphabetically)
    3. Documents within packets (in the order added)



Filter & Search Tools

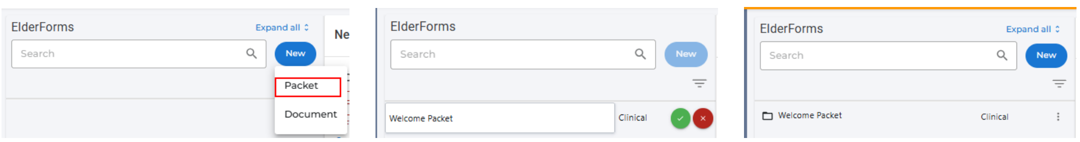
- Multi-select filters for **Enabled**, **Disabled**, **Clinical**, and **Documents Only** (with more options like CRM and Billing planned)
- Default view shows all items
- "Documents Only" hides packets and disables "Expand/Collapse All"

- Active filters display as removable badges
- Smart (“fuzzy”) search helps quickly locate specific items

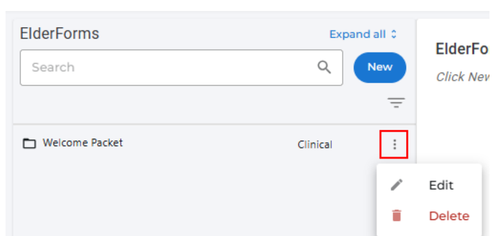


Packet Management

- **Create New Packet:** Add and name a packet, with app assignment (Clinical for now)



- **Edit Packet:** Rename or update its app assignment
- **Delete Packet:**
  - If it contains documents, a message provides guidance before deletion
  - If empty, deletion is confirmed and contained documents are converted to stand-alone items



- **App Inheritance:** Documents within a packet automatically inherit the packet’s app setting

Document Management

- **Create New Document:** Opens configuration in the right-hand panel
- **Edit or View:** Access via document name or 3-dot menu; disabled documents appear faded
- **New Button:** Disabled while another document or packet is being created or edited

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Access Levels

- **Full Access:** ElderForms Manager and above
- **No Access:** All other users

Configuration – Messaging

We've added clear, instructional messages within the **ElderForms Configuration** page to help users understand what actions are available and what to do next. These messages provide helpful guidance ensuring an intuitive setup and editing experience.

Highlights

- **Default messages** appear in the right-hand panel based on whether packets or documents exist.

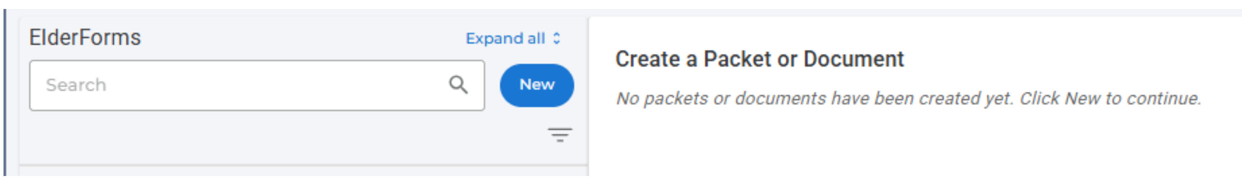
Behavior Overview

When No Packets or Documents Exist

- The right panel displays the message: *"No packets or documents have been created yet. Click New to continue."*
- The **New** button is active for users with edit permissions.

When Packets or Documents Exist

- The right panel displays the message: *"Click New to create a Packet or Document or select a document in the list to view."*
- Users with edit access can either create a new item or select an existing one to manage.



Form Configuration

Highlights

- **Full Formstack integration** for registering and configuring new ElderForms documents
- **Dynamic setup panel** that adapts to form state and user actions
- **Validation and workflow protection** to prevent incomplete saves or accidental data loss
- **Confirmation modals** for unsaved changes, disabled document saves, and Formstack ID edits
- **Role-based access control** for editing, saving, and deleting documents

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Key Behaviors

Formstack Integration & Setup

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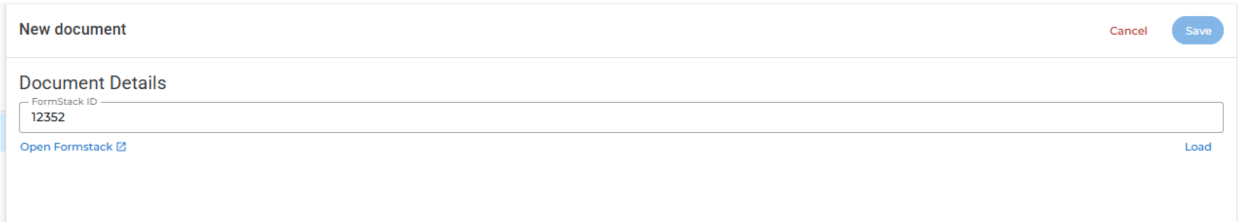
- Users can load new documents by entering a valid **Formstack ID**.
  - The Formstack ID will be provided by Eldermark Staff
- If the ID fails to load, users receive a clear error message and remain in setup view.
- Once loaded, data fields, routing options, and app assignment controls become available for configuration.

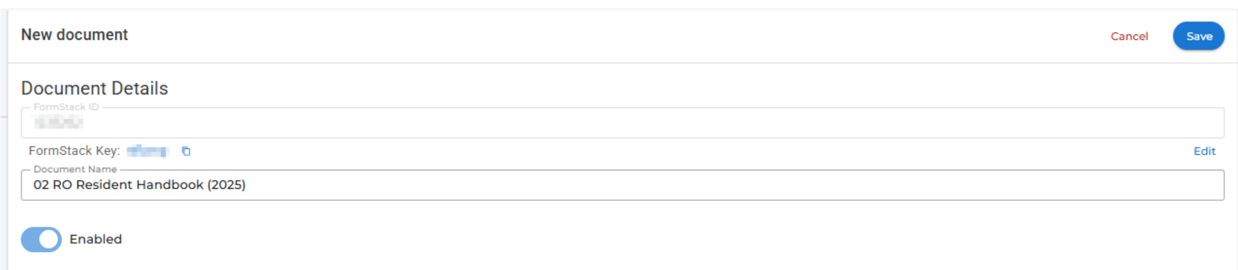


Document Details Section

This section provides key identifiers and the current status of the Formstack document.

Displayed Fields:

- **Formstack ID** – Displays the unique identifier for the linked Formstack document.
  - The Formstack ID will be provided by Eldermark Staff
- **Formstack Key** – Displays the associated API key or reference value used for integration.
  - Auto populated from Formstack and cannot be changed
- **Status** – Indicates whether the document is currently *Enabled* or *Disabled*.



Copy Icon Behavior:

- Each value (Formstack ID and Formstack Key) includes a **copy icon** for easy access.
- Clicking the icon copies the value directly to the clipboard

Packet Details Section

Displays contextual information about how the document is grouped and where it's available.

Stand Alone Document Status:

- If the document is configured as a **stand alone form**, the text: "*Stand alone document*" appears under this section.
- If not enabled, the stand-alone row is omitted.

Data Source:

- Always displayed (e.g., "*Resident*") to clarify which data model the document references.

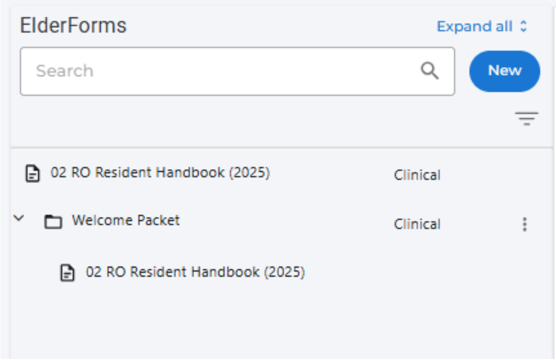
Assigned Packets:

- If the document belongs to one or more packets: *Assigned Packets: [Packet A], [Packet B]* (comma-separated list)
- If the document is not assigned to any packet: *Assigned Packets: none selected*

All values reflect the actual saved configuration, ensuring accuracy when reviewing document setup.

Combined Display Logic

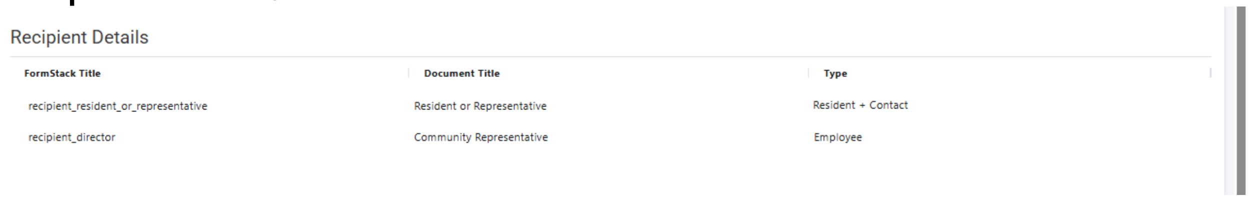
ElderForms dynamically displays documents based on their assignment and configuration status, ensuring visibility in all applicable contexts.



- **Stand alone only:** The document appears as a top-level item in the left-hand list.
- **Packet only:** The document appears nested under its assigned packet.
- **Both:** The document appears both as a stand-alone item *and* within its assigned packet(s).

In the view panel, both states are represented—showing the stand-alone designation (if applicable) along with packet assignments for full context.

Recipient Details Section



Summarizes who receives or interacts with the document. This table provides a quick, clear view of each configured recipient without enabling edits.

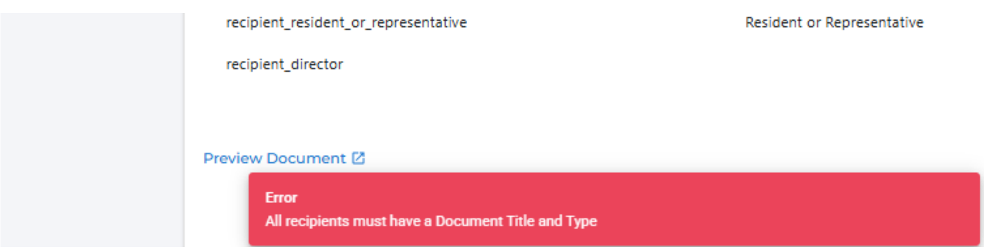
Displayed Columns:

- **Formstack Title:** The label used in Formstack (e.g., *Approve Signer*).
- **Document Title:** The user-facing title (editable during configuration, view-only here).
- **Type:** Specifies the recipient type (*Resident*, *Employee*, *Contact*, or *All*).

Validation & Save Requirements

To successfully save, the following must be complete:

- A **valid Formstack ID** (successfully loaded)
- **Document Name** provided, but can be modified
- All recipients configured, with:
  - A **Document Title**
  - A **Type** selected
  - Either **Stand-Alone** enabled or a **Packet** assigned



Confirmation & Workflow Protection

- **Disabled Documents:** When saving a document marked as disabled, users are prompted: "Save as Disabled? The record you're saving is marked as Disabled. Saving will keep it inactive."
- **Unsaved Changes:** Attempting to navigate away triggers: "You have unsaved changes. Are you sure you want to discard them?"

- **Formstack ID Editing:**
    - Editing prompts a confirmation: "Are you sure you want to edit this document's Formstack ID? Editing will discard all currently saved configuration."
    - Confirming resets all loaded data until the new Formstack ID is validated.

Post-Save Actions

- Saved documents appear in **view-only mode** with the header updated to the document name.
- The left panel automatically refreshes to reflect current filters and show the new or updated document.
- In **edit mode**, users can delete a document. Deletion triggers: "Are you sure you want to delete the Document: [Document Name]? All configuration will be lost and will no longer be available for creation."

Permissions

- **Full Access:** ElderForms Manager and above (including Brand Admin and Implementation roles)
- **Read-Only Access:** Brand Support
- **No Access:** All other users

Preview

We've added a convenient **Preview Document** link within the ElderForms configuration panel, allowing authorized users to view or download Formstack documents directly from Eldermark—without leaving their workflow. This makes it faster and easier to verify document layout, content, and formatting before finalizing configurations.

Highlights

- A new **"Preview Document"** link appears at the bottom of the configuration panel in both **View** and **Edit** modes.
- Provides a read-only preview by downloading the document for review.

Recipient Details

FormStack Title	Document Title	Type
recipient_resident_or_representative	Resident or Representative	Resident + Contact
recipient_director	Community Representative	Employee

Preview Document

Behavior Details

Preview Document Link

- Appears once a valid **Formstack ID** is successfully loaded.
- Styled as a blue hyperlink for clear visibility.
- Accessible in both **View** and **Edit** modes within the configuration panel.

Click Behavior

- Clicking the link automatically downloads the document as a **.docx** file.
- The downloaded file name matches the saved document title in Eldermark for easy identification.
- Eldermark stays open—no page refresh or navigation change required.

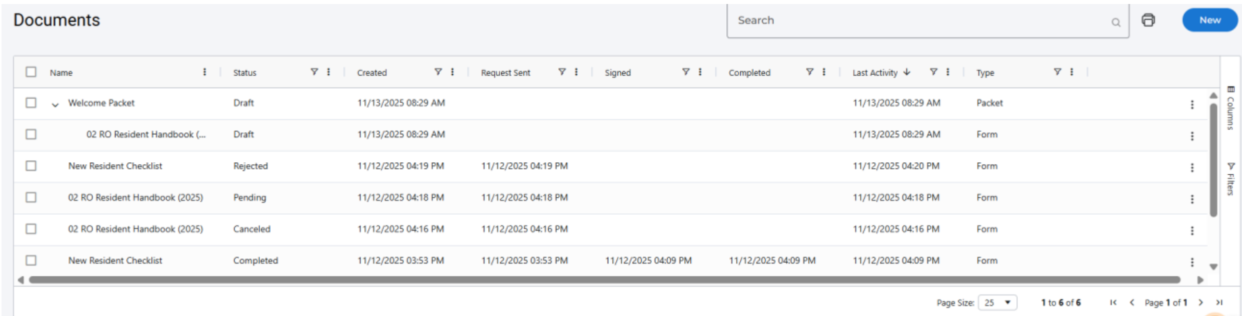
This new preview feature helps users confirm form accuracy and presentation without disrupting their configuration process, ensuring every ElderForm is verified and ready for use.

Documents in the Resident Record

We've added a dedicated **Documents** tab inside each resident record so your team can quickly find, filter, and take action on ElderForms—without jumping between screens.

Why it matters

- **Faster workflows:** View every resident form/packet in one place.
- **Smarter tracking:** See status at a glance and act right from the grid.
- **Fewer clicks:** Print, resend, or open documents directly from the list.



Documents

Search

New

Name	Status	Created	Request Sent	Signed	Completed	Last Activity	Type
Welcome Packet	Draft	11/13/2025 08:29 AM				11/13/2025 08:29 AM	Packet
02 RO Resident Handbook (...	Draft	11/13/2025 08:29 AM				11/13/2025 08:29 AM	Form
New Resident Checklist	Rejected	11/12/2025 04:19 PM	11/12/2025 04:19 PM			11/12/2025 04:20 PM	Form
02 RO Resident Handbook (2025)	Pending	11/12/2025 04:18 PM	11/12/2025 04:18 PM			11/12/2025 04:18 PM	Form
02 RO Resident Handbook (2025)	Canceled	11/12/2025 04:16 PM	11/12/2025 04:16 PM			11/12/2025 04:16 PM	Form
New Resident Checklist	Completed	11/12/2025 03:53 PM	11/12/2025 03:53 PM	11/12/2025 04:09 PM	11/12/2025 04:09 PM	11/12/2025 04:09 PM	Form

Columns Filters

Page Size: 25 1 to 6 of 6 Page 1 of 1

What's new

- **Fuzzy search** across all visible columns (works seamlessly with pagination).
- **Filter panel** with:
    - **Status:** Draft, Pending, Signed, Completed, Cancelled
    - **Date Range:** Created, Request Sent, Signed, Completed
    - **Type:** Form, Packet
- **Column controls:** Show/hide any column except **Name** (always visible). Choices apply instantly and persist for the session.
- **Action menu** (⋮) on each row with options that adapt to the document's status.
- **Print menu** with:
    - **Print Selected Forms (#)** — prints selected Forms and Packets (enabled once at least one item is checked)
- **Bulk requests handled clearly:** When multiple documents are sent/saved together, each form/packet appears on its own row. Selecting any of those rows opens the same shared detail page for that request set.

Actions by status – click on the action icon to select any of the following actions with the corresponding status.

- **Draft:** Open, Print, Delete
- **Pending:** Open, Resend Request, Print, Cancel
- **Signed:** Open, Resend Request, Print, Cancel
- **Completed:** Open, Print
- **Cancelled:** Open, Print

Action Definitions

- **Open**: Open into the detail page to view signer's progress.
- **Resend Request**: Resend the email request to the next signer in the signature list.

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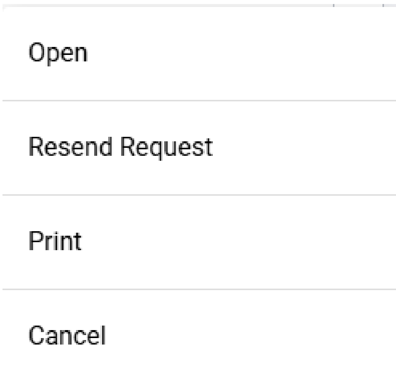
- **Print**: Print the document.
- **Cancel**: Cancel the document request.



Sorting, filtering, pagination

- **Sort** any column.
- **Filter** using the side panel.
- **Pagination** controls at the bottom keep the grid responsive on large record sets.

Resident Workflow – Document Creation and Send

We're excited to introduce the **ElderForms Creation and Send Workflow**, enabling staff to create, manage, and send documents directly from a resident's chart. This workflow brings form completion, routing, and notification capabilities into a unified experience—supporting faster onboarding, consistent compliance, and streamlined resident documentation.

Business Need

Communities can now handle resident forms and packets directly within Eldermark, ensuring accuracy and timeliness. This workflow supports:

- **Faster onboarding** for new residents
- **Coordinated review and acknowledgment** by nursing or leadership staff
- **Automatic notifications** to the right recipients (employees, residents, or contacts)

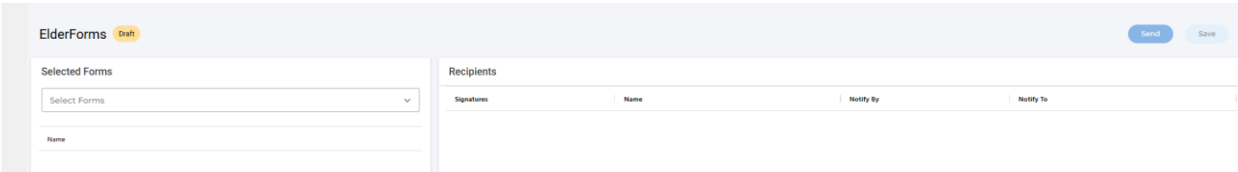
Highlights

- Create new **ElderForms document send instances** from a resident's Documents tab.
- Select and bundle **individual forms or entire packets** for delivery.
- Assign recipients dynamically based on community roles or resident contacts.
- Track notifications by preferred method (in person, email, or phone).
- Support full **edit access for drafts** and read-only access once sent.
- User-persistent **filters and column layouts** in the listing view.

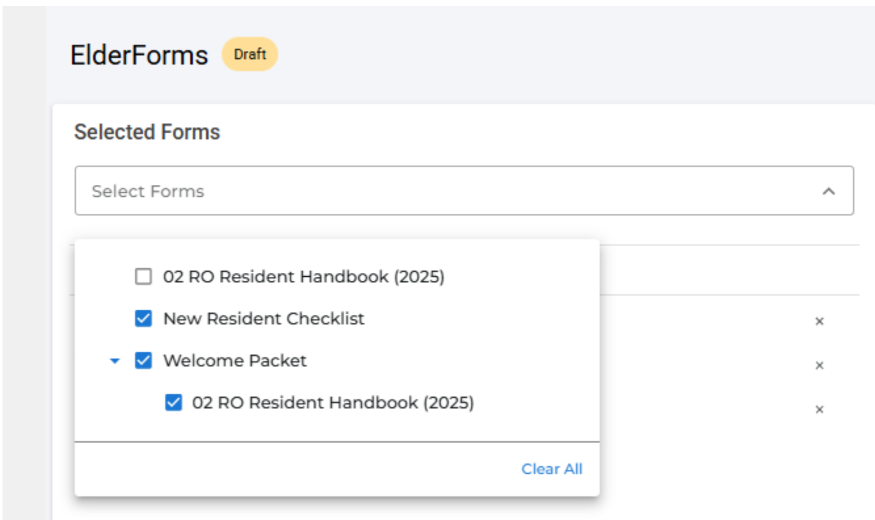
Workflow Overview

General Flow

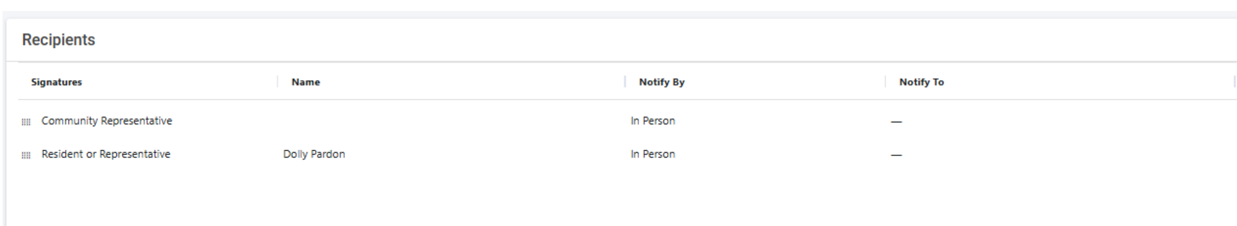
- Clicking **New** creates a **Draft** instance of a document.



- The workspace displays two panels:
    - **Selected Forms (left):** add or remove individual forms or packets (packets expand to show nested forms).



    - **Recipients (right):** manage recipients and delivery methods.



- Once a document is **sent**, the record becomes read-only for audit and compliance tracking.

Edit Mode (Draft Only)

- Available only while status = **Draft**.
- All fields (forms, recipients, and notification methods) are editable and are required to Save or Send.
- **Cancel** acts as **Delete**, available only in Draft mode.

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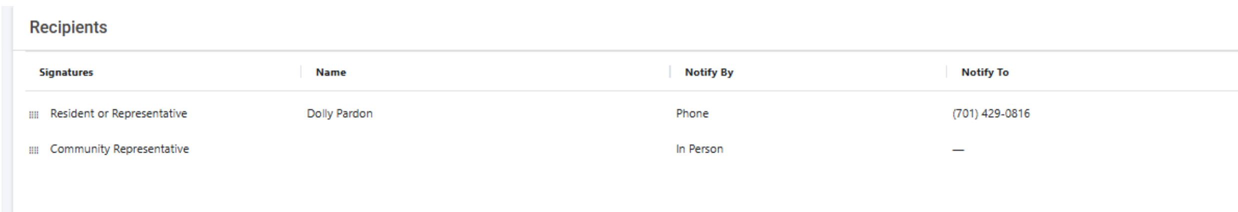
- Upon **Save** or **Send**, users are returned to the document listing view.
- Toasts confirm success or failure of actions.

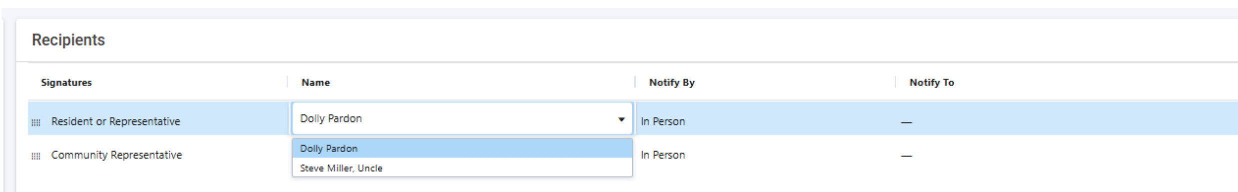
Recipient Management
Recipients are automatically suggested based on the document's configuration and can be customized as needed.

Recipient Details
Each recipient row includes:

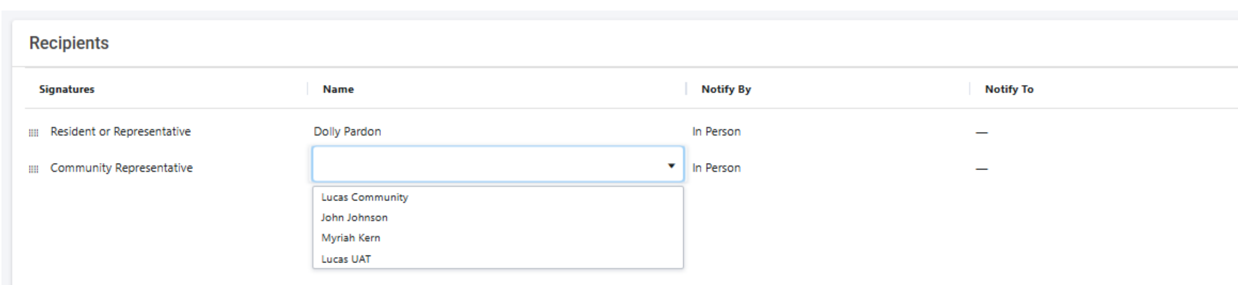
- **Name:** Selected from a dropdown based on community roles or contact relationships
    - **Resident:** Populated from the resident record



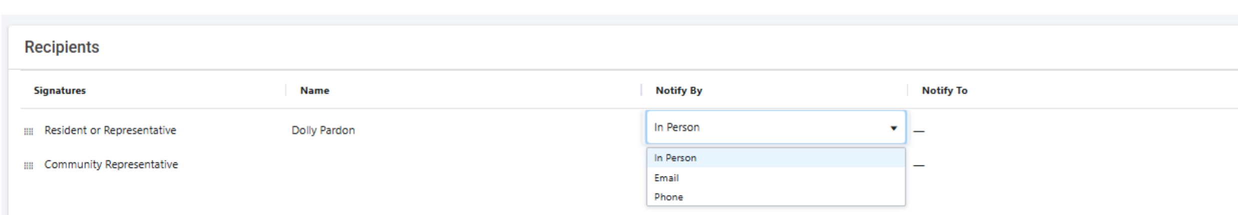
    - **Contacts:** Drawn from the resident's contact list



    - **Employees:** From community-enabled users



- **Notify By:** Dropdown of methods (*In Person, Email, Phone*)



- **Notify To:** Input field (email or phone, auto-filled when known)

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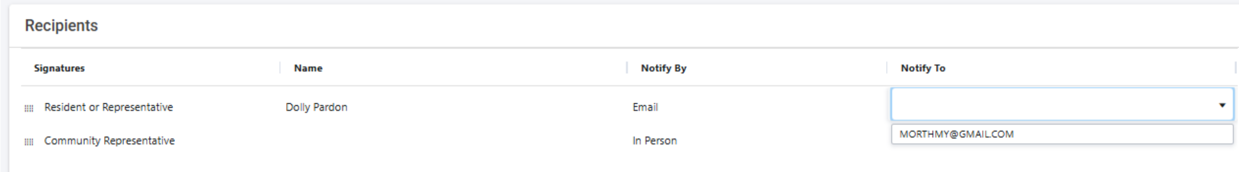


Save and Send Behavior

Save

- Saves progress as a **Draft**.
  - Recipient fields are required to save draft
- Returns user to the **Documents listing**.
- Drafts remain editable on re-entry.

Send

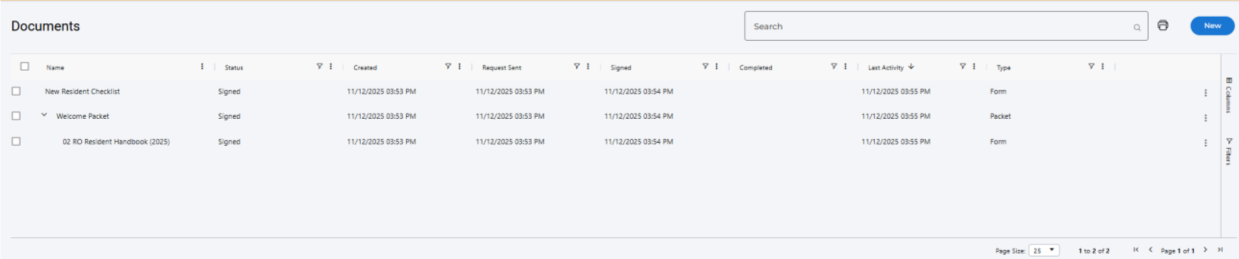
- Sends documents to recipients based on their notification method.
  - Recipient fields are required to send
- Updates record status to **Pending**.
- Locks all fields for data integrity.
- Displays a **confirmation toast** upon success.

Delete

- Available only in **Draft** status.
- Prompts confirmation: "Are you sure you want to delete? Selected forms will be removed from the Documents tab of the resident record."
- Confirming deletes the draft from the resident's record.

Sent Instance View

We've introduced a new **read-only ElderForms instance view** that allows staff to monitor and support active or completed form requests directly from a resident's Documents list. This enhancement provides full visibility into document progress, recipients, and signature statuses—without requiring edit access.



NEXT Release Notes

Highlights

- View complete details for any **sent ElderForms request**, including all selected forms, assigned recipients, and their contact methods.
- Monitor **signature progress** in real time with clear status badges for each recipient.
- Support **in-person signers** through a convenient **"Sign Now"** option.
- View overall request status with visible badges (Pending, Signed, Cancelled).
- Ensures transparency and accountability while protecting document integrity.

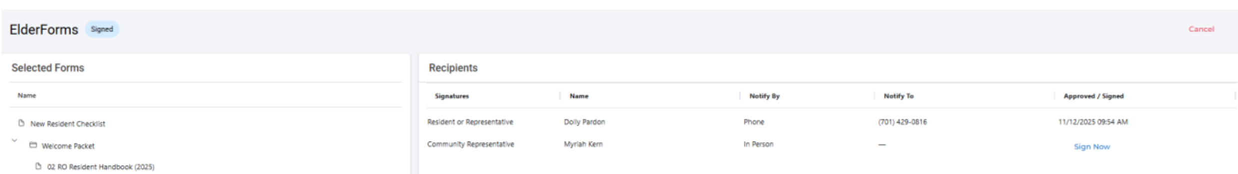
Navigation

Path: Clinical→ Resident→ Documents → Action Button→ Open

Click Action button and open any row to open the **ElderForms instance** in a read-only view.

Use Cases

- **In-person signing support:** Staff can help residents or family members complete signatures in person without needing edit access.
- **Signature tracking:** Teams can quickly identify who has signed, who's pending, or if a request was rejected or cancelled.



Access Levels

Role	Capabilities
No Access	Cannot access ElderForms in the Documents tab or under.
ElderForms User	Can view, add, and print documents. Can delete their own drafts.
ElderForms Manager	Full access to create, edit, and delete any drafts.

Access & Layout

- Users with **Read Only** access or higher can open a sent ElderForms request from the **Documents list**.
- The instance view includes:
    - **Left Panel:** Displays all selected forms and packets included in the request.
    - **Right Panel:** Displays recipients, roles, and signature statuses.

Recipient Details

- Each recipient row includes:
  - **Signatures:** (e.g., Resident, Executive Director, Form Reviewer)
  - **Name**
  - **Notify By:** (In Person, Email, Phone)
  - **Notify To**
  - **Approved/Signed:** (Approved, Waiting, Signed, Cancelled)

Status Badges

- A visible **status badge** at the top reflects the current request state:
  - **Pending –** No Signature has been collected
  - **Signed –** At least one signature has been collected
  - **Cancelled –** Community has cancelled the document

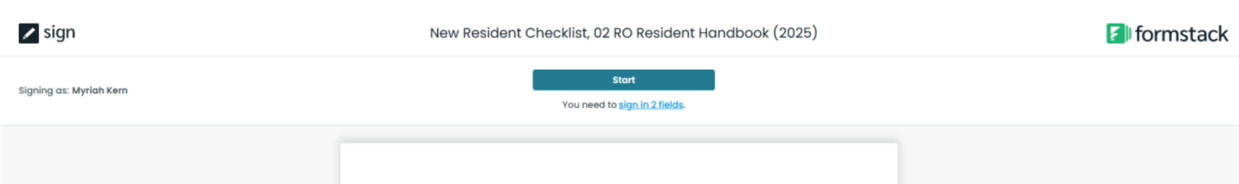
In-Person Signing

- If a recipient is present and the form is configured for **In Person** signing:
  - A **"Sign Now"** button appears.

Recipients

Signatures	Name	Notify By	Notify To	Approved / Signed
Resident or Representative	Dolly Pardon	Phone	(701) 429-0816	11/12/2025 09:54 AM
Community Representative	Myriah Kern	In Person	—	Sign Now

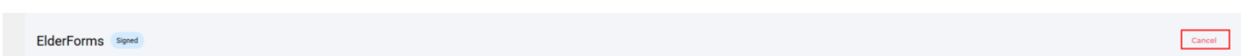
  - Clicking opens a **new browser tab** for the signer to complete their section.

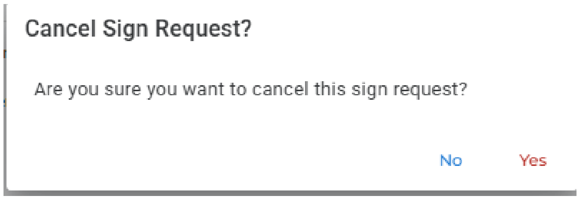


  - Signature routing continues automatically based on the configured workflow order.

Cancel Request

- Authorized users can click **"Cancel Request"** from the detail page to stop the signature workflow.





- Cancelling updates the record status to **Cancelled** and halts all remaining signature actions.

Login Tracking

We've introduced a new **Login Tracking** view that lets Community Managers and above monitor what users are accessing the platform. This marks the first phase of **User Activity Tracking**, designed to provide transparency into login behavior and help ensure secure system use.

Why It Matters

- **Monitor engagement:** See who's logging in and when.
- **Troubleshoot access issues:** Quickly spot unusual login activity.
- **Support compliance:** Confirm session duration for audits, training, or documentation.

What's New

A new **Logins** tab displays all user session activity in a sortable, searchable grid.

Location: Settings → Activity Tracking

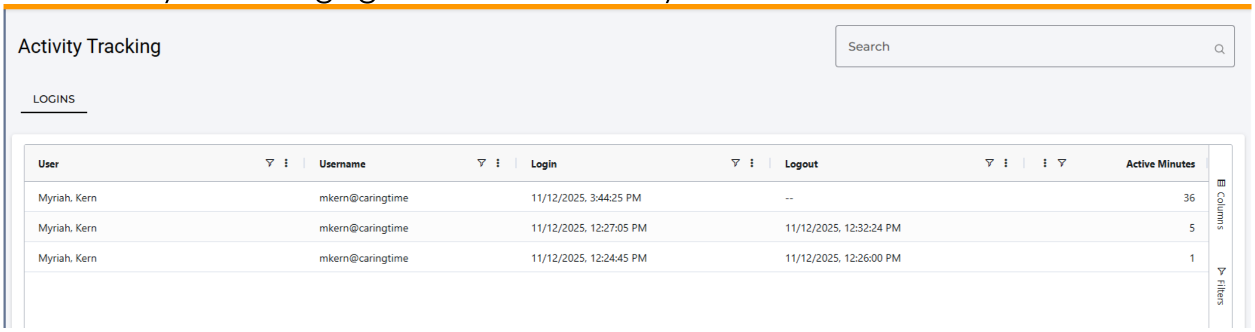
Default Columns

- **User (Full Name)**
- **Username**
- **Log In (Date/Time)** — when the user entered the system
- **Log Out (Date/Time)** — when the session ended
- **Active Minutes** — total session duration

Key Features

- **Smart search:** Find users or times with partial, case-insensitive matches.
- **Flexible sorting:** Sort any column to see your data your way.
- **Pagination controls:** View 25, 50, or 100 records per page.
- **Session persistence:** Sorting and pagination preferences remain as you navigate.

This enhancement helps administrators maintain visibility and accountability while supporting community-wide engagement and security.



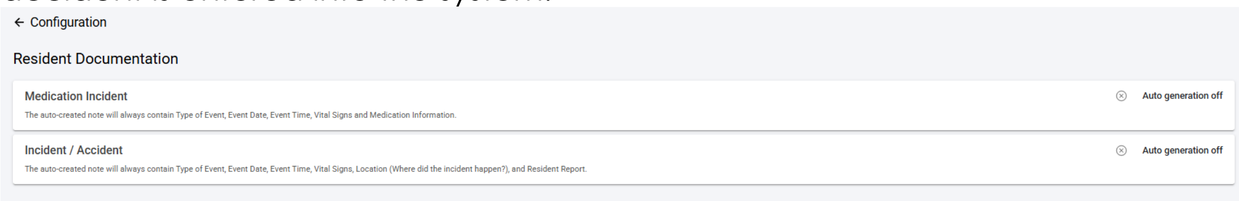
Risk Management Progress Note Autocreation

Resident Documentation Note Configuration

Navigation:

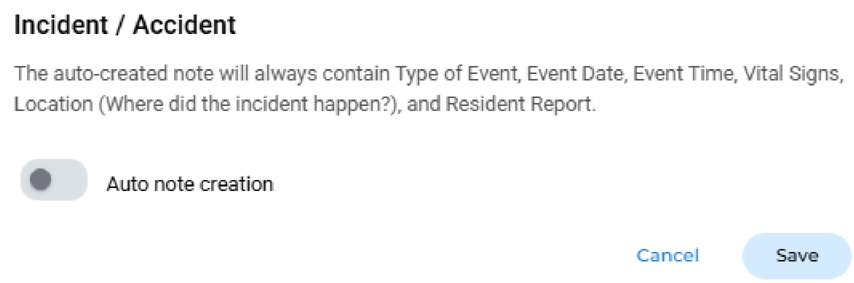
Risk Management > Configuration > Incident/Accident or Medication Incident > Enable Auto Note Creation > Configure what is included on the note

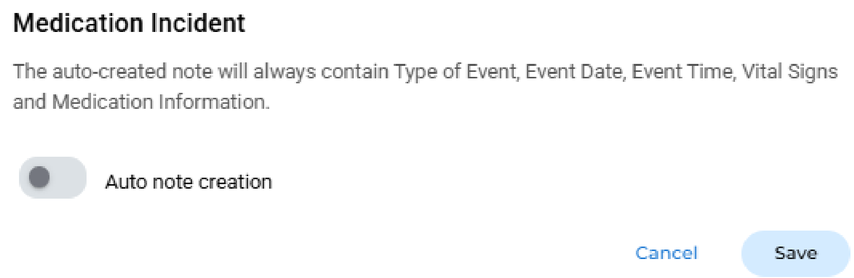
This setting determines **what details are automatically added** to a note when an incident or accident is entered into the system.



Auto Note Creation

- The **Auto note creation toggle** enables or disables the feature.
  - **Off (gray):** No note is automatically generated when an incident or accident is entered.
  - **On (blue):** The system automatically creates a note using predefined incident details.





When enabled, the system will include essential fields in the note such as:
Incident/Accident:

- Type of Event
- Event Date and Time
- Vital Signs
- Location (where the incident occurred)
- Resident Report

Medication Incident:
- Type of Event
- Event Date and Time
- Vital Signs
- Medication Information

Include Additional Information

When Auto Note Creation is **enabled**, you can choose which **optional questions or details** to include in the automatically generated note by checking the corresponding boxes:
Incident/Accident:

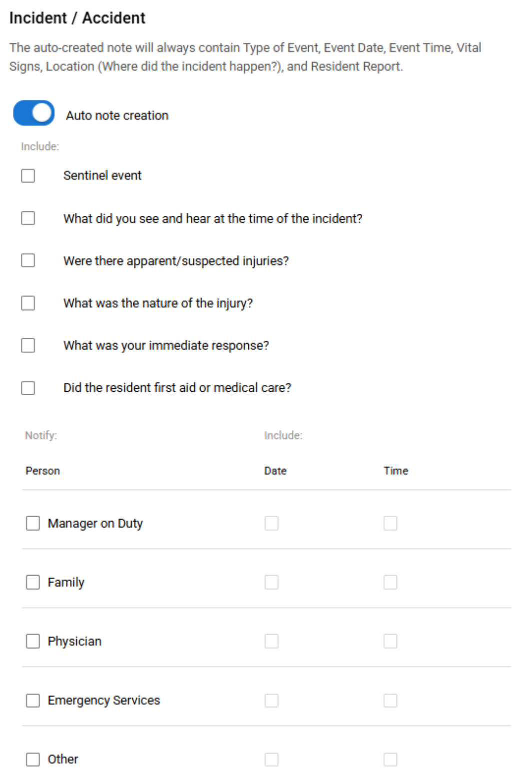
- Sentinel event
- What did you see and hear at the time of the incident?

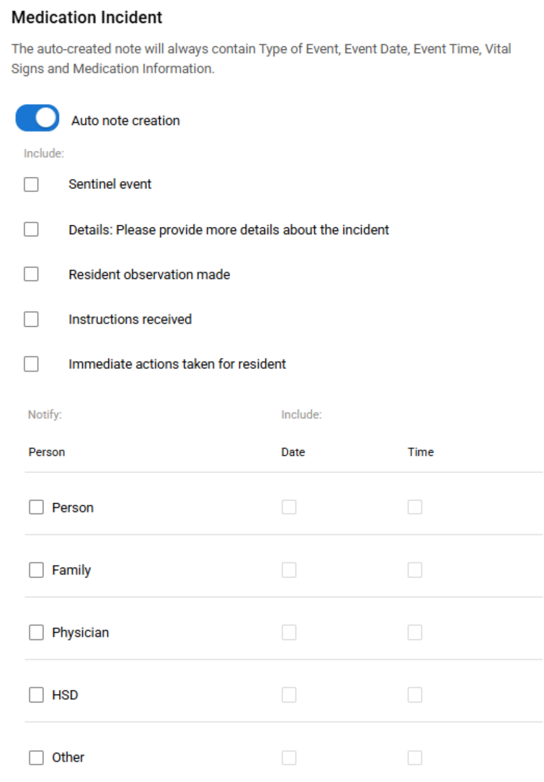
- Were there apparent/suspected injuries?
- What was the nature of the injury?
- What was your immediate response?
- Did the resident receive first aid or medical care?

Medication Incident:

- Sentinel event
- Details
- Resident observations made
- Instructions received
- Immediate actions taken for the resident

This lets your team customize how detailed the auto-generated incident note will be.





Notification Section

At the bottom of the screen, you can configure **who was notified** and what **information to include** about the notification:

For each person or group, you can check:

- **Person:** who was notified (e.g., Manager on Duty, Family, Physician, Emergency Services, or Other)

- **Date** and **Time:** when they were notified
- Optionally include these details in the auto note.

This ensures that all communication and follow-up actions are documented consistently.

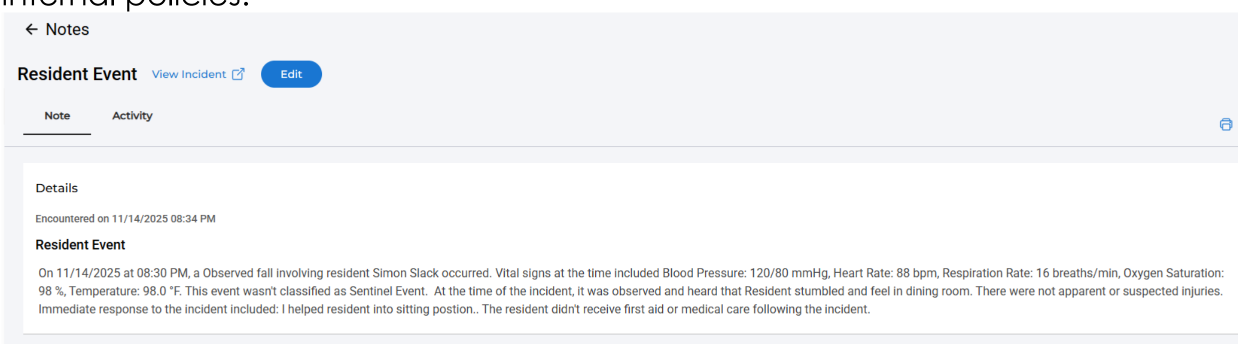
Actions

- **Save:** Confirms and applies your configuration settings.
- **Cancel:** Discards any changes made.

In summary:
This configuration page allows you to **automate documentation** for incidents/accidents by predefining which fields and notifications should appear in the generated note — helping maintain accuracy, completeness, and compliance in resident care documentation.

Risk Management – Link Incident to Resident Note

This enhancement connects **Risk Management incidents** directly to the **Resident Chart**, ensuring every documented event is reflected as a narrative note when configured to do so. It supports consistent documentation and helps communities maintain compliance with their internal policies.



What's New

• **Auto-Create Notes** – When the "*Auto Create*" option **is** enabled in Risk Management settings, the system automatically generates a note in the resident's chart once an incident is signed.
• **Configurable Behavior** – If "*Auto Create*" **is not** enabled, no note is created, giving communities full control over their documentation processes.
• **Story Template Format** – Notes are generated using a preformatted story template that maps incident details into a clear narrative summary.
• **Accurate Data Mapping** – Key fields such as event type, reported date/time, location, vitals, injuries, and notifications are automatically populated based on incident data and configuration.

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Why It Matters

This feature streamlines clinical documentation, reducing manual entry and ensuring every incident is recorded in alignment with community policies. It also improves transparency and consistency between Risk Management and Resident Chart documentation.

Behavior Overview

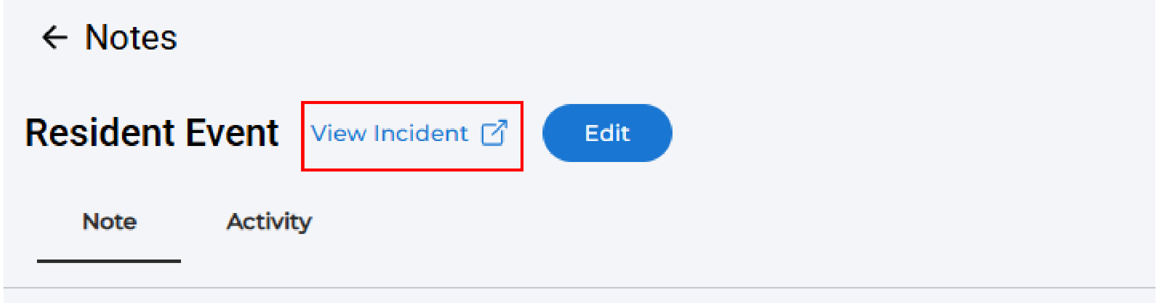
• Incident is created and signed in Risk Management.
• When *"Confirm and Sign"* is clicked:
– If *Auto Create* is **enabled**, a **Resident Event** or **Medication Event** note is added to the resident's chart.
– If *Auto Create* is **disabled**, no note is created.
• Each note follows the configured **story template**, dynamically adjusting content based on available data and selected configuration fields.

Example Narrative for Incident Accident

"On April 15, 2025, at 2:45 PM, an observed fall involving resident Nancy Leeman occurred. Vital signs at the time included Blood Pressure: 128/82 mmHg, Respiration Rate: 18 breaths/min, Oxygen Saturation: 96%, and Temperature: 98.7°F.
This event was not classified as a Sentinel Event. At the time of the incident, it was observed that Nancy stumbled and fell while walking in the hallway near the dining room. There were apparent injuries, with the nature of the injury being mild bruising to her left hip.
Immediate response included assisting the resident and administering first aid. Linda Leeman, daughter, was informed at 3:00 PM by phone."

Example Narrative for a Medication Incident:
"On April 15, 2025, at 9:30 AM, a medication administration incident involving resident Nancy Leeman occurred. Vital signs at the time included Blood Pressure: 130/85 mmHg, Heart Rate: N/A, Respiration Rate: 18 breaths/min, Oxygen Saturation: 97%, Temperature: 98.4°F, Pain Level: 2/10, and Blood Glucose: 105 mg/dL. The medication involved was Lisinopril.
This event was not classified as a Sentinel Event. Details provided about the incident include: The medication was administered to Nancy at an incorrect dosage, with the resident receiving 20 mg instead of the prescribed 10 mg. Observations made regarding the resident were: Nancy remained calm and reported no adverse reactions immediately following the incident.
Instructions received post-incident were: Monitor Nancy closely for any changes in vital signs or symptoms of hypotension and notify the physician immediately if concerns arise.
Immediate actions taken for the resident included: Notifying nursing staff for continuous monitoring, providing water, and ensuring Nancy rested comfortably in a seated position.
Following the incident, notifications were promptly made. Linda Leeman, daughter, was informed at April 15, 2025, 3:00 PM by phone."

Clinical Notes – "View Incident" Shortcut



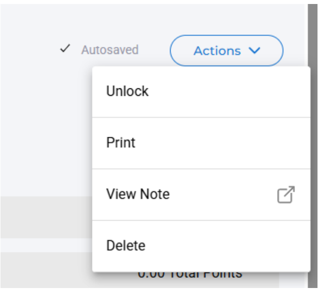
Quickly jump from a Resident Note to its linked Incident in Risk Management.

What's New

- **Icon next to the Note header:** Appears only when the Note is linked to an Incident.
- **Text:** "View Incident."
- **One-click navigation:** Clicking the icon opens the exact Incident in Risk Management.

Why it matters
Fewer clicks and faster context switching between Clinical Notes and Risk Management—no more manual searching.

Risk Management – "View Note" Shortcut



Quickly jump from a Risk Management Incident to its linked Note in Clinical.

What's New

- **Icon available in Action Menu**
- **Text:** "View Note."
- **One-click navigation:** Clicking the icon opens the exact Note in Clinical.

Why it matters
Fewer clicks and faster context switching between Clinical Notes and Risk Management—no more manual searching.

NEXT Release Notes

Medication Incident Report – New Questions Added

To enhance documentation quality and clarity during medication incident reporting, two new open-text questions have been added to the Medication Incident Report form. These fields provide additional context around the incident, supporting better communication and follow-up across care teams.

What's New

• **Instructions received:** Open-text field for recording any directions or guidance given at the time of the incident.

• **Immediate actions taken for the resident:** Open-text field for describing the steps taken to ensure resident safety immediately following the incident.

Why It Matters

These additions promote more complete incident documentation, enabling improved root cause analysis, follow-up actions, and overall medication safety tracking.

Risk Management – Linked Note Deletion Rules

To maintain data integrity and prevent orphaned records, Risk Management now enforces **automated deletion rules** for incidents with associated notes and restricts manual deletion of those notes from the Resident Chart.

What's New

• **Automatic Note Deletion:** When a Risk Management Incident is deleted, all associated notes on the Resident Chart are automatically deleted as well.

• **Controlled Access:** Only RM Managers can delete it, ensuring proper oversight.

• **Confirmation Messaging:** After a successful deletion, users see a confirmation toast: "Incident and all associated notes successfully deleted."

Why It Matters

This update reduces user error and ensures accurate recordkeeping by preventing orphaned notes or partial deletions. It keeps Risk Management and Clinical documentation aligned and compliant with community policies.