



# NEXT Release Notes 2026.2

## Release Overview

This release expands Activity Tracking visibility, introduces new state reporting tools, enhances incident intervention configuration, and delivers important stability improvements across Clinical and CRM workflows.

From structured, filterable audit tracking at the Resident, Community, and Organization levels, to Pennsylvania state form printing, these updates provide greater transparency, compliance support, and operational clarity. At the same time, new configuration flexibility within Incident Investigations allows communities to align intervention workflows with their preferred documentation model.

## Highlights

**Activity Tracking Enhancements** – New audit grids and detailed event views across Resident, Community, and Organization levels, with field-level tracking for key Profile, Medical, and Housing updates. Includes advanced filtering, consistent timezone handling, and structured history views for Create, Update, and Delete actions.

**Pennsylvania State Forms (PA RASP & PA ASP)** – Generate compliant, resident-specific hard-copy state forms directly from completed evaluations to support PA regulatory requirements.

**Configurable Investigation Intervention Workflow** – Choose whether incident investigations use Service Plan interventions, Plan of Care interventions, or none—allowing each community to align documentation with operational standards.

**Stability & Workflow Improvements** – Enhancements to activity list filtering, service scheduling reliability, referral filtering, influencer creation, and Service Catalog validation to ensure smoother day-to-day system performance.

Together, these updates strengthen transparency, flexibility, and reliability—supporting compliance, clearer documentation, and more efficient operations across your communities.



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## Activity Tracking – Audit Activity List & Detail View

We're introducing enhanced **Activity Tracking** capabilities across Resident, Community, and Organization levels to provide greater visibility into Create, Modify, and Delete actions within the system.

This release includes new audit activity grids, advanced filtering, timezone-aware date handling, and a detailed read-only Activity Details view.

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### Activity Tracking – Activity List

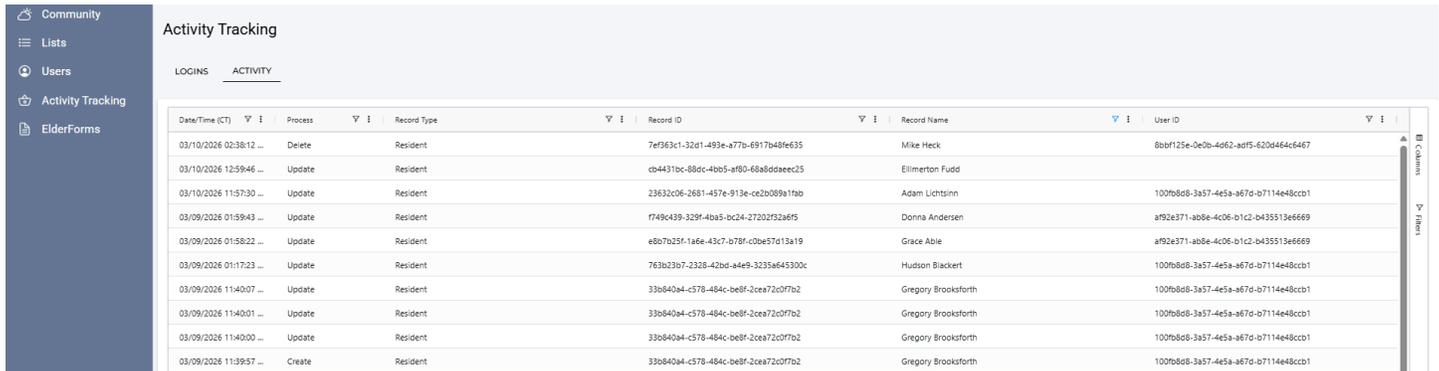
#### Activity Tracking

Audit activity listings are now available in the following areas:

- **Clinical > Resident > Activity Tracking**
- **Community Settings > Activity Tracking**
- **Org Admin > Activity Tracking**

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Each page displays Create, Update, and Delete audit actions filtered by the relevant level (Resident, Community, or Organization).



The screenshot shows the 'Activity Tracking' interface. On the left is a navigation menu with 'Community', 'Lists', 'Users', 'Activity Tracking', and 'ElderForms'. The main area has tabs for 'LOGINS' and 'ACTIVITY'. Below the tabs is a table with columns: Date/Time (CT), Process, Record Type, Record ID, Record Name, and User ID. The table contains 12 rows of activity logs.

Date/Time (CT)	Process	Record Type	Record ID	Record Name	User ID
03/10/2026 02:38:12 ...	Delete	Resident	7e7963c1-32d1-493e-a77b-6917b48e635	Mike Heck	8bbf125e-0e0b-4d62-af15-620d464c6467
03/10/2026 12:59:46 ...	Update	Resident	cb4431bc-88dc-4bb5-af80-68a8d9aee2c5	Ellimerton Fudd	
03/10/2026 11:57:30 ...	Update	Resident	23632c06-2681-457e-913e-ce2b089a1f8b	Adam Lichtsinn	100fb8d8-3a57-4e5a-867d-b7114e48ccb1
03/09/2026 01:59:43 ...	Update	Resident	f749c439-329f-4ba5-bc24-27202f2a6f5	Donna Andersen	af92e371-ab8e-4c06-b1c2-b435513e6669
03/09/2026 01:58:22 ...	Update	Resident	e807b25f-1a6e-43c7-b78f-c0be57d13a19	Grace Able	af92e371-ab8e-4c06-b1c2-b435513e6669
03/09/2026 01:17:23 ...	Update	Resident	763b23b7-3328-42bd-a4e9-43235a645300c	Hudson Blackert	100fb8d8-3a57-4e5a-867d-b7114e48ccb1
03/09/2026 11:40:07 ...	Update	Resident	33b840a4-c578-484c-b68f-2cea72c0f7b2	Gregory Brookforth	100fb8d8-3a57-4e5a-867d-b7114e48ccb1
03/09/2026 11:40:01 ...	Update	Resident	33b840a4-c578-484c-b68f-2cea72c0f7b2	Gregory Brookforth	100fb8d8-3a57-4e5a-867d-b7114e48ccb1
03/09/2026 11:40:00 ...	Update	Resident	33b840a4-c578-484c-b68f-2cea72c0f7b2	Gregory Brookforth	100fb8d8-3a57-4e5a-867d-b7114e48ccb1
03/09/2026 11:39:57 ...	Create	Resident	33b840a4-c578-484c-b68f-2cea72c0f7b2	Gregory Brookforth	100fb8d8-3a57-4e5a-867d-b7114e48ccb1

## Role Access

### Resident Level

A new **Activity Tracking** tab appears on the Resident record.

- Visible to **Community Manager and higher** only.
- Hidden from users below Community Manager.

### Community Level

- A new **Activity** tab appears to the left of Logins under Community Settings > Activity Tracking.
- Visible to **Community Manager and higher** only.

### Organization Level

- A new **Activity** tab appears to the left of Logins in Org Admin > Activity Tracking.
- Visible to:
  - Org Admin
  - Customer Service
  - Global Admin

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## Activity Grid

All Activity pages use AG Grid with column-level filtering and sorting.

### Default Behavior

- Default sort: **Date/Time descending**
  - Page loading indicator displays while data is being retrieved.
  - Filtering is available on all supported columns.
  - Designed with performance in mind to support efficient data retrieval and filtering.
- 

### Date/Time Display & Timezone Handling

#### Column Header

The Date/Time column header displays the resolved timezone abbreviation:

#### Example:

Date/Time (ET)

#### Formatting

MM/DD/YYYY HH:MM:SS AM/PM

All values are converted from UTC into the resolved timezone shown in the header.

#### Timezone Resolution Rules

- **Community Level:**  
Uses the timezone configured in Community Settings.
- **Organization Level and Above:**  
Uses the user's browser timezone if it matches a supported U.S. timezone.  
If not supported, defaults to Eastern Time (ET).
- **Activity Details Page:**  
Date/Time displays in the **user's local browser timezone**, with the timezone shown in parentheses in the header.

The header and the displayed data always reflect the same timezone.

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## Columns by Level

### Resident Level – Default Columns

- Date/Time

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- Process (Create, Update, Delete)
- Record Type
- Username

## Optional Columns

- User ID
  - User
  - Event ID
  - Record ID
  - Record Name
  - Community ID
  - Community
  - Related Record ID
  - Related Record Type
  - Related Record Name
- 

## Community Level – Default Columns

- Date/Time
- Process
- Record Type
- Record ID
- Username

## Optional Columns

- User ID
- User
- Record Name
- Event ID
- Community ID

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- Community (Name)
  - Related Record ID
  - Related Record Type
  - Related Record Name
- 

## Organization Level – Default Columns

- Date/Time
- Process
- Record Type
- Record ID
- Username
- Community (Name)

## Optional Columns

- User ID
  - User
  - Community ID
  - Record Name
  - Event ID
  - Related Record ID
  - Related Record Type
  - Related Record Name
- 

## Column Filtering

Column filtering is available across all Activity grids:

Supported filters include:

- Date/Time
  - Uses same filtering behavior as Resident Admit Date

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- “Between” is inclusive of both selected dates
  - Record Type
  - Record ID
  - Process
  - User ID
  - Username
  - Event ID
  - Related Record ID
  - Related Record Type
  - Community ID
  - Community Name
- 

## [Activity Details Page](#)

Clicking a row in the Activity grid opens a read-only **Activity Details Page**.

### **Access**

- Community Managers and above (Community level)
- Admin roles only (Organization level)

Includes:

- Back button to return to list
- 

### **Details Section (Top)**

Displays metadata for the selected event:

- Username
- User ID (ID, First Name, Last Name)
- Process
- Date/Time (user’s local timezone shown in header)
- Event ID

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- Record Type
- Record ID
- Related Record ID
- Related Record Type
- Community (Name)
- Community ID
- Name
- Related Name

Details		
Community Red-Door House	Community ID 7f29a054-2d83-4043-9f74-2d81d535abde	Date/Time 03/09/2026 11:11 AM (GMT-05:00)
Event ID a4b616b2-5c84-46f6-a9fb-8749995e442c	Process Update	Record ID f749c439-329f-4ba5-bc24-27202f32a6f5
Record Type Resident	Related Record ID	Related Record Type
User sbement@uatbrandadmin	User ID 100fb8d8-3a57-4e5a-a67d-b7114e48ccb1	

All fields are also available as optional columns in the Activity grid.

## History Section (Bottom)

Behavior varies by Process type:

### Update

History		
Field ↑	New	Old
lastName	Andersen	Anderson

Columns:

- Field
- New
- Old

### Create

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## History

Field ↑	Data
communityId	7f29a054-2d83-4043-9f74-2d81d535abde
firstName	Hannah
gender	FEMALE

Columns:

- Field
- Data

## Delete

Field ↑	Data
firstName	Mike
gender	MALE
hasPicture	UNKNOWN
id	7ef363c1-32d1-493e-a77b-6917b48fe635
interoperability	true
isAdmitted	true
isDeleted	true
isDischarged	false

Columns:

- Field
- Data

Additional behavior:

- Field column is sortable
- Vertical scrolling supported
- Print reflects correct column structure based on event type

## Summary

This enhancement introduces structured, filterable audit tracking across Resident, Community, and Organization levels with consistent timezone handling, role-based access, and detailed event history visibility — all designed with performance and scalability in mind.



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## Activity Tracking – Audit Visibility Across Resident, Medical, and Housing

This release expands **Activity Tracking** to provide field-level audit visibility across key areas of the resident record. Communities can review **who** made a change, **what** changed, **when** it changed, and the **before/after values**—all from the resident's **Activity Tracking** view.

We'll continue expanding coverage to additional areas in future releases.

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### What's Included

#### Resident Profile (Profile Tab)

**Navigation:** Resident Record → **Profile** tab → applicable section

Create, Update, and Delete activity is tracked for:

- **Demographics**
  - **Contacts**
  - **Accommodations**
  - **Agencies**
  - **Insurance**
- 

#### Medical Tab

**Navigation:** Resident Record → **Medical** tab → applicable section

Create, Update, and Delete activity is tracked for:

- **Care Team** (resident-level changes only)
  - **History** (Diagnoses, Surgical, Allergies, TB Screen, Immunizations)
  - **Events** (including Infectious Disease and Leave of Absence workflows)
  - **Vitals** (single and bulk entry)
  - **Labs** (single and bulk entry)
  - **Input / Output** (single and bulk entry)
- 

#### Housing Tab

**Navigation:** Resident Record → **Housing** tab → applicable section

Create, Update, and Delete activity is tracked for:



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- **Summary** (Admit, Discharge, Admission History, Care History)
  - **Occupancy** (Unit, Occupants, Unit History)
- 

## What the Audit Trail Captures

For all included areas, Activity Tracking records:

- **Action type** (Create, Update, Delete)
- **Timestamp**
- **User ID / Username**
- **Section + field(s) changed**
- **Old value and new value**

## Save behavior

- If **Save** is clicked with **no net changes**, no activity is recorded.
  - If one or more fields change, a **single action record** is created for that save, with **each changed field listed individually**.
  - Bulk workflows (where applicable) record each saved entry and correlate them by timestamp for traceability.
  - Both user-entered and system-generated updates (API sync/imports) are included when they result in saved changes.
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## Tracking Scope by Area

### Profile Tab

#### Demographics

Tracks all fields in Demographics, including:

Identity, Resident Contact, Medical Identifiers, custom fields, Information, Storage, Faith, Appearance, Partner, Lifestyle, Biography, Pets, Culture, Social Groups, and state-specific cards (e.g., NY background sections).

#### Contacts

Tracks all fields within each **individual contact record**, including:

Profile, Address, Phone Numbers, Email, and Notes.

#### Accommodations



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Tracks all fields, including:

Evacuation Status, Diet, Personal Directives (including document uploads), and Durable Medical Equipment.

## Agencies

Tracks resident-linked fields such as:

Hospital, Funeral Home, Pharmacy, and resident-associated transportation/provider fields.

- Standalone provider list maintenance is not tracked unless it directly changes resident-linked data.

## Insurance

Tracks resident-level fields across:

Public Health (Medicaid/Medicare), Health, and Dental—provider selection, policy/group info, contact details, and status.

- Updates to provider records in **System Settings** do not create resident-level activity entries.

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## Medical Tab

### Care Team

Tracks resident-level roster changes and Profile edits:

- Add/remove care team members
- Profile card updates: **Role, Specialty, Organization**  
Excludes Contact and Identifiers cards, which are maintained in **Settings** → **Lists** → **Medical Professionals** and will be tracked in a future release.

### History

Tracks CREATE, UPDATE AND DELETE activity for:

- Diagnoses, Surgical, Allergies, TB Screen, Immunizations  
(Field-level tracking applies to the editable forms/modals for each.)

### Events

Tracks Create, Update and Delete activity across event types, including nested components where applicable:

- Leave of Absence (including Hospital card fields)

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- Infectious Disease (including Progress, Tests, Living Arrangements)  
Deletes capture the full event structure as part of the deletion record.

## Vitals

Tracks Create, Update and Delete for:

Blood Pressure, Heart Rate, Respirations, Oxygen Saturation, Temperature, Pain, Height and Weight.

**BMI is excluded** (not editable from the Vitals workflow).

Bulk entry logs each saved vital individually and correlates by timestamp.

Badge-tagged rows are restricted to their designated edit paths; blocked edits do not create activity.

## Labs

Tracks Create, Update and Delete for:

Blood Glucose, Creatinine, INR (Result, Unit if editable, Date, Time).

Bulk entry logs each saved lab individually; badge-tagged results are restricted to their designated edit paths.

## Input / Output

Tracks Create, Update and Delete for:

Bowel Movement, Meal Intake, Intake, Output (value/result, unit where applicable, date/time).

Bulk entry logs each saved item individually; badge-tagged rows (e.g., Cares) are read-only here and must be edited in their originating workflow.

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## Housing Tab

### Summary

Tracks field-level updates/clears for:

- Admit
- Discharge
- Admission History (excluding non-editable Admit/Discharge date changes)  
Tracks full Create, Update and Delete for:
  - Care History (supports multiple rows)

## Occupancy

Tracks changes across:



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- Unit card (**Delete only**)
- Occupants modal (Create, Update and Delete: Start/End date-time, Primary/Secondary, Notes)
- Unit History (editable only when End Date is blank; closed rows are locked) Changes made from Occupancy, Unit History, or Unit Detail stay in sync and are tracked under the initiating user/context.

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## Why It Matters

This release provides a structured audit trail to support:

- Compliance and accountability
- Incident investigation
- Clinical documentation integrity
- Transparent collaboration across teams

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## What's Next

We'll continue expanding Activity Tracking coverage to additional resident and settings-level areas in future releases.

## [Pennsylvania State Forms: PA RASP and PA ASP Assessment Support Plan](#)

Clinical users can now generate **hard-copy Pennsylvania state forms** directly from completed evaluations, making it easier to provide the correct documentation for **PA regulatory requirements**.

## What's new

Two PA state forms are now available to print in the required state format:

- **PA RASP Resident Assessment Support Plan**
- **PA ASP Assessment Support Plan**

Each printed form is **resident-specific** and pulls information from:

- the **evaluation you select to print**, and
- relevant details from the **resident profile**

## Who can use this

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Available to **Clinical Provider and above.**

## Where this happens

**Clinical → Resident Record → Medical → Evaluations**

## Workflow

1. Complete the applicable evaluation:
  - **PA RASP**, or
  - **PA ASP Assessment Support Plan**

<b>Adult Residential Licensing – Resident Assessment and Support Plan</b> For compliance with 55 Pa.Code §§ 2600.225-227						
<b>PART I: RESIDENT INFORMATION</b>						
Name:	Formal Supports			Informal Supports (Family, Friends, etc.)		
	Support	Name	Telephone Number	Name	Relationship	Telephone Number
Polly PA	Primary Physician			Drew PA	Brother	7018869696
	Dentist			Doug	Friend	896-896-8965
Date of Birth:	Case Manager					
	Other (specify): Daughter	Susan	789-789-9886			
Date of Admission: 09/05/2025	Other (specify):					
<b>Comments or related information:</b> None						
<b>PART II: ASSESSMENT AND SUPPORT PLAN INFORMATION</b>						
Date of Admission:	<b>Reason for Assessment:</b> <input type="checkbox"/> Initial <input type="checkbox"/> Annual <input checked="" type="checkbox"/> Significant Change* <input type="checkbox"/> Department Request	<b>Reason for Support Plan:</b> <input type="checkbox"/> Initial <input type="checkbox"/> Annual <input checked="" type="checkbox"/> Significant Change* <input type="checkbox"/> Department Request	<b>Date Assessment Finalized:</b> 01/27/2026  <b>Finalization Timeframes:</b> <i>Initial</i> – Within 15 days of admission <i>Annual</i> – Within 380 days (1 year plus 15-day grace period) after most recent assessment <i>Significant Change</i> – Within 5 calendar days of significant change <i>Department Request</i> – Within 24 hours of request			
Date of Last Assessment: 01/25/2026			<b>Date Support Plan Finalized:</b> 01/28/2026  <b>Finalization Timeframes:</b> <i>Initial</i> – Within 30 days of admission <i>Annual</i> – Within 30 days of completion of the annual assessment <i>Significant Change</i> – Within 5 calendar days of new assessment <i>Department Request</i> – Within 24 hours of new assessment			
Date of Last Support Plan: 01/26/2026	<b>*If the assessment and support plan were completed due to a significant change, please include a description of the change:</b> Resident came back from hospital after fall					



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Assisted Living Residence –Assessment and Support Plan (ASP) For compliance with 55 Pa.Code Chapter 2800						
PART I: RESIDENT INFORMATION						
Name: Polly PA	Formal Supports			Informal Supports (Family, Friends, etc.)		
	Support	Name	Telephone Number	Name	Relationship	Telephone Number
	Primary Physician			Drew PA	Brother	7018869696
Date of Birth:	Dentist			Jake	Brother	7985632365
	Case Manager					
Date of Admission: 09/05/2025	Other (specify): Susan	Doug	25745248			
	Other (specify):					
Comments or related information: No additional comments						
PART II: ASP INFORMATION						
Date of Admission (Proposed): 01/20/2026	<b>Reason for ASP</b>		<b>Timeframes</b>			
Date of Admission (Actual): 09/05/2025	<input type="checkbox"/> Initial (Preliminary and Final) <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Significant Change* <input type="checkbox"/> Department Request		Note: "Admission" means the date the resident physically moves into the residence  <i>Initial-Preliminary</i> – Within 30 days prior to or 15 days after admission <i>Initial-Final</i> – Within 30 days prior to or 30 days after admission <i>Annual</i> – Within 380 days (1 year plus 15-day grace period) after most recent ASP <i>Significant Change</i> – Within 5 calendar days of significant change <i>Department Request</i> – Within 24 hours of request			
Date of Last ASP: 01/01/2026	Dates ASP was updated (include the date and page numbers of any updates to the ASP made between the preliminary and final ASPs or between ASPs):					
*If the assessment and support plan were completed due to a significant change, please include a description of the change:						

2. From the evaluation in **Medical** → **Evaluations**, select **Print** to generate the state form.

## Output details

- Prints in the **correct PA-required format**

## Incident Investigations: Configurable Intervention Workflow (Service Plan vs Plan of Care)

Communities don't all document interventions the same way. With this update, Risk and Clinical leaders can choose how interventions are created during an incident investigation—aligning the Investigation workflow to each community's operational model.

## What's New

A new **Investigation Intervention** configuration has been added to both incident form setup pages. This setting controls:

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- Whether an **Intervention** section appears on the Incident **Investigation** tab
  - Which workflow is used when staff add a new intervention:
    - **Service Plan** (Services only)
    - **Plan of Care** (Services + Area of Focus)
    - **None** (no interventions in incidents)
- 

## Where to Configure

### Medication Incident Form Setup

Risk Management / Clinical → Configuration → Medication Incident Form Setup →

### Investigation Intervention

### Resident Incident Form Setup

Risk Management / Clinical → Configuration → Resident Incident Form Setup → **Investigation**

### Intervention

### Who can configure it

Risk Manager, Clinical Manager, Community Manager, and higher (per existing configuration permissions)

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## Configuration Options

Each setup page includes a dropdown with these options:

- **None** (*default*)
- **Service Plan**
- **Plan of Care**

The card displays the selected value exactly as:

- None
- Service Plan
- Plan of Care

Help text is shown in the modal:

“Selecting Service Plan enables adding Services in the Incident, while selecting Plan of Care enables adding both Services and Areas of Focus under the Investigation tab.”

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## How It Works in Incidents

### When None is selected

- The **Intervention** section is **not shown** on the Investigation tab (Medication or Resident incidents)
- No “New Intervention” actions are available

### When Service Plan is selected

- The Investigation tab shows an **Intervention** section (list + **New** button)
- Selecting **New** opens the **Service modal** used from the resident's **Services** tab
  - Supports **Existing** (resident services) and **Library** (community services)
  - **Area of Focus is hidden**
- Saving links/creates the service and displays it in the incident's Intervention list

### When Plan of Care is selected

- The Investigation tab shows an **Intervention** section (list + **New** button)
- Selecting **New** opens the **Evaluation-style Service modal**
  - **Area of Focus is shown**
  - Service selection behaves like Area of Focus workflows
- Saving links/creates the care plan intervention and displays it in the incident's Intervention list

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## Consistency & Safeguards

- Medication and Resident Incident Forms store their settings **independently** (one does not affect the other)
- “Investigation Intervention” terminology is consistent throughout
- If an older configuration contains an invalid value, the system treats it as **None** and hides the Intervention section
- Saving follows existing save patterns and success/error toasts; errors preserve the prior selection

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## Fixes Included in This Release

The following updates improve stability and consistency across Clinical and CRM workflows.

### **Activity lists and search results stay aligned with the latest filters**

Improved request handling to prevent older, slower-loading results from overwriting a user's most recent filter or search selection. This helps ensure the list reflects the **latest** filter/search state—even when users change options quickly and large datasets take longer to load.

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### **Service scheduling reliability restored for communities**

Resolved an issue where scheduled services could stop generating consistently, resulting in gaps between what is on a resident's service plan and what appears on the schedule. Services now continue scheduling as expected to support uninterrupted caregiver workflows.

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### **Prospect Review referral status filtering works consistently**

Addressed an error that could occur when filtering Prospect Review leads by certain referral status selections (including "All"), ensuring lead lists load correctly across environments.

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### **Influencers can be created without selecting a Prospect**

Fixed an issue where adding an Influencer without an associated Prospect could fail when the system attempted to create the placeholder Prospect record ("Prospect Name Pending"). Influencers can now be created successfully in this scenario.

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### **Service Catalog schedule fields no longer block saving**

Adjusted validation in the Service Catalog so schedule-related fields no longer behave as "all-or-nothing." Users can now clear or update scheduling configuration without being forced to complete every schedule field before saving.

