



NEXT Release Notes 2026.4

This release brings a broad set of enhancements across reporting, clinical workflows, integrations, and CRM—focused on improving visibility, usability, and operational efficiency across the platform.

A new Shower & Laundry Report introduces flexible, real-time views to better support both resident planning and staff scheduling, while expanded Activity Tracking delivers deeper audit visibility across configuration and resident care workflows. Clinical updates enhance data entry, configuration clarity, and printed outputs, ensuring information is more complete, readable, and consistent across the system.

In addition, Integrator API enhancements provide more comprehensive resident data to support connected systems, and CRM updates improve prospect management, multi-occupant workflows, and navigation consistency.

Together, these updates provide a more transparent, efficient, and user-friendly experience across key areas of the platform, helping teams manage operations, care delivery, and reporting with greater confidence.

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Shower & Laundry Report

The Shower & Laundry Report has been released to provide a more flexible and efficient experience for viewing, managing, and sharing bathing and laundry services.

Report Overview

Navigation: **Reports** → **Shower & Laundry Report**



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The report now includes tabs to support different workflows:

- **All by Resident (default)** – Resident-focused view for quick planning

Resident	Unit	Service	Shift	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Houbt, Minnie	20	Shower	NOC	✓	✓	✓	✓	✓	✓	✓
Wayne, Bruce	20	Shower	NOC	✓				✓		
Morth, Howard	01	Shower	NOC, Days	✓	✓	✓	✓	✓	✓	✓

- **Shower by Shift** – Shift- and provider-based view for staffing and workload management

Shift	Provider	Resident	Unit	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
All Day	Nurse All Day	Donnah Anderson	04	✓	✓	✓	✓	✓	✓	✓
Days	Caregiver AM	Jane Smith	04	✓	✓	✓	✓	✓	✓	✓
Days	Caregiver AM 2	Howard Morth	01	✓	✓	✓	✓	✓	✓	✓
Days	Caregiver AM 5	Hudson Blackhert	19	✓	✓	✓	✓	✓	✓	✓

Key Capabilities Across Tabs

- **Flexible Views**
 - Resident-first and shift-based layouts to support both planning and staffing needs
 - Data is driven by Service Catalog configuration and community-defined shifts
- **Smart Service Assignment**
 - Time-based services align to the appropriate shift
 - Interval-based services align to the first applicable shift
- **Improved Visibility**
 - Only relevant data is shown (e.g., residents without services and empty groupings are hidden)
 - Filters help narrow results by Unit, Shift, and Day of Week (where applicable)
- **In-Grid Service Access**
 - Clickable day cells (Mon–Sun) open service details in a modal
 - Users can view or update services without leaving the report
 - Changes save in place and refresh immediately
- **Export & Print**
 - Export to **CSV or Excel** via right-click within the grid
 - Exported data reflects the current view, filters, and visible rows

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- Print directly from the report with a clean, landscape layout, standardized header, and applied filters

Activity Tracking Enhancements

This release expands **Activity Tracking** to provide broader audit visibility across configuration and resident care workflows. Users can now review Create, Update, and Delete activity with clear insight into **what changed, who made the change, and when it occurred**.

Configuration Activity Tracking

Activity Tracking now includes expanded coverage across key configuration areas:

- **Units**
 - Tracks changes to **Stations** and **Floor Plans**
 - Includes creation, updates, status changes, rate changes, and deletions
- **Service Providers**
 - Tracks changes across **Assignments, Roles, Shifts, and Manage Units**
 - Includes updates to staffing configuration and unit-to-assignment mappings
- **Forms Configuration**
 - Tracks updates to **Service Agreement, Plan of Care, Service Plan, and Facesheet**
 - Includes changes to setup, included fields, text, and signature options
- **Plan of Care Configuration**
 - Tracks changes to **Area of Focus, Expected Outcome, Area of Focus Category, and Settings**
 - Includes configuration updates and status changes
- **Care Levels**
 - Tracks changes to **Care Level** and **Risk Level**
 - Includes creation, updates, status changes, and deletions

Resident Services Activity Tracking

Activity Tracking is now extended across the **Services** area of the resident record, providing end-to-end visibility into care planning and delivery.

- **Plan of Care**
 - Tracks Create, Update, and Delete activity for:
 - Areas of Focus
 - Expected Outcomes
 - Services & Interventions
 - Comments
 - Includes detailed, field-level changes within care plans
- **Service Plan**
 - Tracks **Create and Update** activity for all service plan items
 - Includes changes to:
 - Service selection, role, duration, and instructions
 - Scheduling details (frequency, times, intervals, start/end dates)
 - Categories, equipment, location, and other configuration fields
 - Captures field-level changes with old and new values for each update
 - Each save action logs a single, grouped record of all changes



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- **Service Delivery**
 - Tracks **Update and Delete** activity for scheduled and documented services
 - Includes changes to:
 - Status (Completed, Not Completed, Missed)
 - Actual times and minutes
 - Assignments and notes
 - Logs deletions of future scheduled services with context (user or system-driven)

What Users Can Expect

Across all areas, Activity Tracking provides:

- **Action type** (Create, Update, Delete)
- **User** who made the change
- **Date and time** of the change
- **Field-level detail**, including old and new values
- Visibility in **Organization, Community and Resident Activity Tracking listings**

These enhancements improve accountability, support audits and investigations, and provide a more complete view of changes across both configuration and resident care workflows.

Clinical Enhancements

This release includes several updates designed to improve usability and clarity across Clinical configuration and resident workflows. These enhancements make it easier to capture more complete information, configure services more efficiently, and better understand selected values throughout the application.

Resident Chart Community Fields

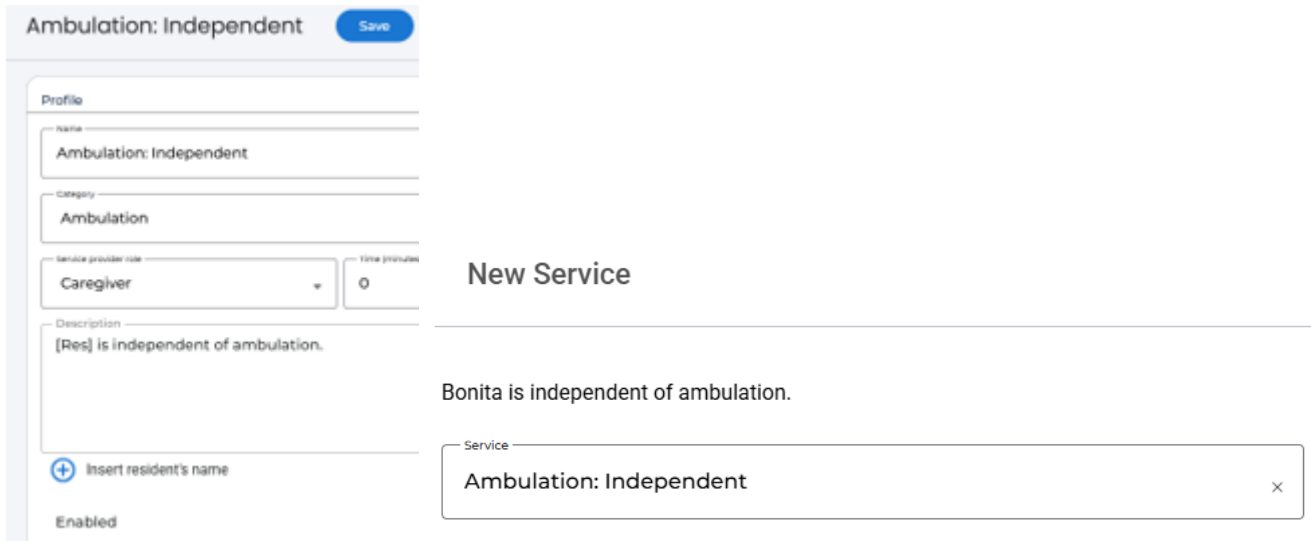
Community Fields in the **Resident Chart** now support up to **200 characters**, increased from the previous 50-character limit. This allows users to enter more complete and meaningful resident-specific information without relying on abbreviations or splitting details across multiple fields. To support longer entries, fields now expand vertically as content grows, text wraps appropriately, and saved information remains readable in edit, view, and client-facing displays.

Service Catalog Resident Name Placeholder

A new “**+ Insert resident's name**” option is now available when editing a Service record in **Clinical > Configuration > Service Catalog**. This allows users to insert a **[Res]** placeholder directly into the Description field. When that service is used in a resident record, the placeholder is replaced with the resident's first name. The updated description also carries through to printed forms such as the **Service Agreement** and **Service Plan**, helping create more personalized and readable service descriptions.

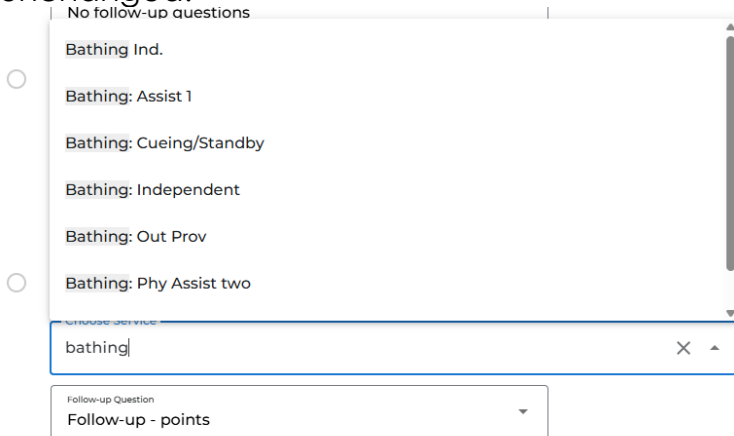


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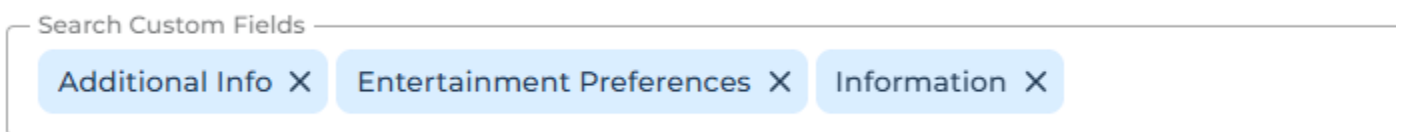
Evaluation Service Search

When configuring evaluations, users can now search for a service in the **Choose Service** field instead of scrolling through the full list. This update makes it faster to find and select the correct service from the Service Catalog while keeping the rest of the evaluation workflow unchanged.



Service Plan Form Custom Field Selection

The **Service Plan** form configuration now provides a clearer multi-select experience for **Custom Fields**. When Custom Fields are enabled, selected values appear as visible badges within the search input, making it easier to confirm selections and remove individual items. The Custom Fields checkbox has also been moved to its own line for improved layout and readability. Selected fields continue to persist on save, refresh, and re-entry into the form configuration, and print as configured using Community Field setup and resident data.



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Evaluation Care Level Display Improvements

Care level selections in **Evaluation Scoring Groups** have been updated to improve readability for longer names. This enhancement makes selected care levels easier to identify without losing context when names exceed the available display space.

Together, these updates improve data entry, configuration clarity, and overall usability across several key Clinical workflows.

Scoring Groups

MC TODO ^

Answer: MC

Scoring Group Name
MC

Care Levels

Care Level
Care Level 1 🗑️

Starting Points 0.00 ^
v Ending Points 15.00 ^
v

Care Level 🗑️

Starting Points 0.00 ^
v Ending Points 0.00 ^
v

Service Agreement & Service Plan Print Enhancements

This release updates the printed **Service Agreement** and **Service Plan** forms to improve consistency, completeness, and alignment with current Eldermark design standards. These updates apply to printed output only and do not change existing workflows.

Service Agreement – Updated Print Layout

The Service Agreement print format has been modernized to match the structure and styling of other updated forms, including the Service Plan.

What's Improved

- **Standardized Header**
 - Consistent layout for community details, resident name, and print timestamp
 - Updated photo placement and formatting aligned with other forms
- **Structured Resident Information**
 - Improved layout for demographics, clinical details, and contact information
 - Consistent formatting for items such as Code Status, Diet, and Hospital Preference
 - Emergency and preferred contacts clearly labeled and formatted
- **Aligned Services Section**

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- Updated table structure with consistent columns: Effective, Service, Role, Day, Time, Minutes
- Improved spacing and readability for long service descriptions
- **Consistent Styling**
 - Unified font hierarchy, spacing, margins, and section dividers
 - Matches current Eldermark branding standards across printed documents
- **Configuration-Driven Display**
 - Sections only appear when enabled and populated in configuration
 - No empty sections or placeholders are shown

Service Agreement – Service Details Enhancements

Printed Service Agreements now include additional service-level details when available:

- **Equipment**
- **Location**
- **Record Health Monitoring**

Behavior

- These fields appear under each service when populated in the resident's service record
- If a field is not populated, it is not shown (no empty labels or spacing)
- Multiple values display cleanly in a list or comma-separated format
- Applies to printing from:
 - **Services** → **Service Agreement**
 - **Medical** → **Evaluations**

Service Plan – Service Details Enhancements

The same service-level details are now included in the printed **Service Plan**:

- **Equipment**
- **Location**
- **Record Health Monitoring**

Behavior

- Displays only when values exist on the service record
- Maintains consistent formatting and ordering:
 - Equipment
 - Location
 - Record Health Monitoring

What This Means

- Printed Service Agreements and Service Plans now have a **consistent, modern appearance**
- Service details more accurately reflect what is configured in the resident record
- No more empty fields or missing service metadata in printed documents
- Improved clarity for staff, residents, families, and compliance documentation



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Service Agreement

Katherine "Katie" Holzworth

Unit: 02 Birthday: Sex: F

Red-Door House
123 Sunset Ave
Willmar, NJ89653
Phone: (612) 351-5711
Fax: (612) 986-3654

Code Status: Resuscitate	Personal Contacts None
Evacuation Status None	Medical Information Weight: 120 lbs
Diet None	Allergies: None
Hospital Preference None	Diagnoses: None
Prepared By Myriah Kern, RN	

Advance Directive: The Client hereby acknowledges receipt of comprehensive documentation concerning the facility's advance directive policies and practices. By entering into this agreement, the Client confirms understanding of procedures applicable to medical decisions should they become incapacitated or otherwise unable to communicate their healthcare preferences clearly. Emergency Plan: Should an emergency or sudden, significant change in the Client's condition occur, facility staff will promptly initiate contact with the designated emergency representative as indicated on the primary contact details page of this service agreement. Immediate action will be guided by established protocols designed to ensure Client safety and compliance with regulatory requirements. Emergency Services: In situations requiring urgent medical intervention, and absent an applicable advance directive from the Client explicitly stating alternative actions, the facility is authorized to secure emergency medical services on behalf of the Client. All such decisions will adhere strictly to clinical best practices and nursing directives established to prioritize the Client's health and safety. Contact Information: For any inquiries or to discuss concerns about services rendered under this agreement, the Client or the Client's Responsible Party should promptly contact the facility's nursing office at (800) 555-1234.

Services

Effective	Service	Role	Day	Time	Minutes
04/23/2024	Behavior: Redirection	Caregiver	As Needed		15
Resident needs frequent redirection.					
10/31/2025	Bathing: Assist 1	Caregiver			30
Resident requires the assist of 1 with bathing. Provide privacy and proper safety measures.					
04/23/2024	Behavior: Wandering	Caregiver	Daily	NOC, AM	10
Resident wander frequently.					
08/20/2024	Bathing: Assist 1	Nurse	Daily	Bedtime	30
Resident requires the assist of 1 with bathing. Provide privacy and proper safety measures.					
04/16/2025	Ambulation: Physical Assist 1	Caregiver	Daily	03:00 AM, 05:00 AM, 07:00 AM, 09:00 AM, 11:00 AM, 01:00 PM, 03:00 PM, 05:00 PM, 07:00 PM, 09:00 PM, 11:00 PM, 01:00 AM	5

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Integrator API Expansion

We've expanded the **Integrator API** to provide additional resident data for connected partners and downstream workflows. These updates improve access to dietary, clinical, demographic, image, and occupancy information to support more complete integrations.

Resident allergy information

Integrator endpoints now support resident allergy data for dietary and clinical use cases.

What's included

- Active resident allergies can now be returned from the resident endpoint when allergen data is requested
- Responses separate **allergies** from **intolerances** based on severity
- Food allergens are categorized independently from drug and environmental entries
- Allergy details include:
 - Name
 - Type
 - Severity
 - Reaction

Only food allergens are included in this integration output, aligned with eMenuCHOICE requirements. Updates to allergen data also trigger the related webhook so connected systems can stay in sync.

Resident personal contacts in demographics

The **demographics** data set now includes the resident's personal contacts, making it easier for integrations to access related people and contact details in one place.

Included contact details

- First and last name
- Phone numbers and phone types
- Email addresses and email types
- Address
- Relationship
- Designations
- Emergency contact indicator
- Call order

Resident profile images

A new resident image endpoint is now available for integrations that display resident profile information.

What's supported

- Resident profile photo retrieval through a dedicated endpoint



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This makes it easier for connected applications to display current resident photos alongside other resident details.

Expanded occupancy dates in Resident Census

The **Resident Census** data now includes both financial and physical occupancy dates for improved downstream visibility.

Updated date mappings

- moveInDate = lease start date
- moveOutDate = lease end date
- unitStartDate = physical move-in date
- unitEndDate = physical move-out date

As part of this update, the previous leaseStartDate output is now represented as moveInDate.

These enhancements provide integrators with a more complete resident profile and better support for care, dining, and occupancy-based workflows.

CRM Enhancements

This release introduces key updates to CRM focused on improving sales workflow visibility, occupant management, and navigation consistency. These enhancements help teams better prioritize prospects, support multi-occupant workflows, and navigate CRM more efficiently.

Interest Levels (Configurable)

Interest Levels are now available in CRM, allowing communities to define and assign prospect readiness indicators.

What's New

- Community-configurable **Interest Levels** (e.g., Hot, Warm, Cold, Deposit Pending)
- Ability to **create, edit, delete, describe, and color-code** levels
- Interest Level is visible across:
 - Prospect records
 - List views
 - Reporting

Benefits

- Improves visibility into prospect pipeline and prioritization
- Supports more consistent and accurate reporting
- Restores key functionality for legacy CRM users
- Establishes a foundation for future standardized reporting across organizations

Navigation

- Configuration: **CRM** → **Configurations** → **Interest Levels**



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- Assignment: **Prospect Record** → **Sales Status**
-

Secondary Occupant Push to Clinical

CRM now supports independently pushing a **secondary occupant** to Clinical for evaluation and agreement workflows.

What's New

- **“Secondary Only”** option added to the Convert to Resident popup (when a second occupant exists)
- Separate **“Primary Ready for Evaluation”** and **“Secondary Ready for Evaluation”** toggles
- Secondary occupant can now be pushed to Clinical independently of the primary

Behavior Updates

- Users can choose:
 - Primary Only
 - Secondary Only (*new*)
 - Both
- Each occupant triggers its own Clinical push and alert
- Maintains correct case association with no duplication

Benefits

- Supports workflows where both occupants require evaluation
 - Improves operational flexibility and accuracy
 - Maintains existing behavior for single-occupant and primary workflows
-

Navigation Improvements

CRM navigation has been updated to provide a more consistent and intuitive experience.

What's New

- **Standardized Close (X) button** placement across CRM pages
- New **Back button** added to Contact Detail pages
- Consistent behavior across user roles

Behavior Updates

- Close (X) returns users to the previous page without exiting the application
- Back button provides a clear alternative navigation path
- Users are prompted when leaving pages with unsaved changes

Benefits

- Reduces confusion and unintended navigation
 - Improves workflow efficiency
 - Creates a more consistent experience across CRM
-

These enhancements strengthen CRM usability by improving pipeline visibility, enabling more complete occupant workflows, and delivering a more predictable navigation experience.