



Release Notes 2026.5 Clinical and 2026.3 EMAR

Release Overview

This release delivers broad enhancements across **Activity Tracking, Clinical reporting, CRM, Integrations, and EMAR workflows**—all focused on improving visibility, strengthening auditability, and streamlining day-to-day operations.

From expanded **Activity Tracking** with deeper audit coverage across clinical, operational, and CRM areas, to new **reporting tools** and enhanced **integration capabilities**, these updates give teams clearer insight into system activity and resident care trends. At the same time, EMAR improvements introduce stronger oversight, more consistent workflows, and improved usability across medication management.

Highlights

Expanded Activity Tracking – Deeper audit visibility across clinical, operational, and CRM workflows, capturing who made changes, what changed, and when—with detailed before-and-after values to support compliance and troubleshooting.

Reporting Enhancements – New and improved reports, including Laundry by Shift, Hospital LOAs with short gaps, and Missed Services by Provider, provide actionable insights into care delivery and operational trends.

CRM Interest Levels – Configurable interest levels help teams prioritize prospects, improve pipeline visibility, and support more consistent sales tracking.

Integrator API Enhancements – Expanded API capabilities now include access to units, clinical notes, note categories, and full vitals history, along with the ability for authorized partners to create resident notes.

EMAR Workflow & Visibility Improvements – New PRN dashboard widget, enhanced audit tracking, improved order editing layouts, and streamlined Receive Orders workflows support safer, more efficient medication management.

Stability & Performance Improvements – Updates across Clinical, Housing, EMAR, and CRM improve scheduling reliability, filtering accuracy, system performance, and data consistency.

Together, these enhancements provide greater transparency, improved operational insight, and more reliable workflows—helping teams deliver consistent, high-quality care with confidence.



NEXT Release Notes

Table of Contents

Clinical	3
Activity Tracking Enhancements	3
Reporting Enhancements	4
Shower and Laundry Report Enhancement - Laundry by Shift Tab.....	4
Hospital LOAs With Gap Less Than 30 Days Report	5
Missed Services by Provider	6
Print Evaluation – Include Points Option	7
CRM Enhancements	8
CRM Interest Levels	8
Integrator API Updates	9
Updated: Get All Units	9
New: Get Note Categories	10
New: Get Resident Notes.....	10
New: Post Resident Notes	10
New: Vitals History.....	10
EMAR	11
Dashboard – PRN Administrations Widget.....	11
Edit Modal Layout Improvements	12
Free-Text Prescriber Enhancement	14
EMAR Audit Enhancements	14
Cancel Order Audit Tracking	15
PRN Frequency Audit Tracking.....	15
Manage Order History	15
Medication Classifications Widget – Default State Update.....	15
Fixes	16
Clinical Schedule Performance Improvements.....	16



NEXT Release Notes

Clinical

Activity Tracking Enhancements

We've expanded **Activity Tracking** to provide deeper visibility into changes across key modules, helping teams audit activity, troubleshoot issues, and maintain accountability.

What's New

Activity Tracking now captures **Create, Update, and Delete activity** across additional areas of the platform, with detailed audit logs showing:

- **What changed**
- **Who made the change**
- **When it occurred**
- **Old vs. new values**

All updates leverage the existing audit framework and are available in **Organization and Community Activity Tracking listings**.

Newly Tracked Areas

Medical Professionals (Settings → Lists → Medical Professionals)

- **Professionals, Specialties, Organizations**
- Tracks creation, updates, enable/disable, and deletion
- Includes profile, contact, identifiers, and status changes

Units (Settings / Community Setup → Units)

- Tracks unit creation, updates, status changes, and deletion
- Includes:
 - Unit details (name, floor plan)
 - Rates (monthly/daily)
 - Service status and government assistance
 - Enable/disable changes

Service Catalog (Clinical → Configuration → Service Catalog)

- **Services, Categories, Intervals**
- Tracks full configuration changes, including:
 - Service details, roles, timing, and descriptions
 - Scheduling and interval configurations
 - Requirements, exclusions, and plan of care associations
 - Category limits and interval timing updates

CRM Activity Tracking (Admin → Activity Tracking)

- Added CRM activity tables to User Tracking:
 - Activities
 - Activity Goals
 - Activity Instances

NEXT Release Notes

- Tracks key lifecycle events:
 - Create, update, complete, delete
 - (Future-ready for cancel, reschedule, no show)
- Includes updates to:
 - Activity details, ownership, contacts
 - Dates/times (due, completed, edited, canceled)
 - Notes and status fields

Impact

These enhancements provide a more complete audit trail across clinical, operational, and CRM workflows—making it easier to investigate changes, support compliance, and improve transparency across teams.

Reporting Enhancements

Shower and Laundry Report Enhancement - Laundry by Shift Tab

We've added a **Laundry by Shift** tab to the **Shower & Laundry Report** to improve visibility into scheduled laundry services and support daily planning.

Where to find it

Reports → Shower & Laundry Report → Laundry by Shift

What's included

- Shift-based view of laundry services by provider and resident
- Uses community-defined shifts
 - Time-based → assigned to containing shift
 - Interval-based → assigned to first shift
- Includes services categorized as *Laundry* from the Service Catalog
- Hides providers with no residents and residents with no active services

Interactivity

- Clickable for Clinical Provider and above to view service details and save to Service Plan

Filters & Export

- Filter by Shift, Provider, Day of Week (if supported)
- Export to CSV or Excel, or print from the report



NEXT Release Notes

Shower and Laundry Report [Collapse All](#)

ALL BY RESIDENT SHOWER BY SHIFT LAUNDRY BY SHIFT

Shift	Provider								
▼ Days	Caregiver AM								
Resident	Unit	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Donna Anderson	04	✓	✓			✓			
▼ NOC	Caregiver NOC								
Resident	Unit	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Donna Anderson	04	✓							
Emmerson Bergstrom	06		✓				✓		
Esther Frescho	09			✓			✓		

Hospital LOAs With Gap Less Than 30 Days Report

We've added a new report that highlights residents with multiple hospital stays occurring within a short timeframe, helping teams identify potential readmission risks and improve care outcomes.

What's New

Hospital LOAs With Gap Less Than 30 Days widget surfaces residents who have consecutive hospital leave of absences (LOAs) separated by fewer than 30 days.

Where to Find It

Clinical → Reports → Hospital LOAs With Gap Less Than 30 Days

Key Capabilities

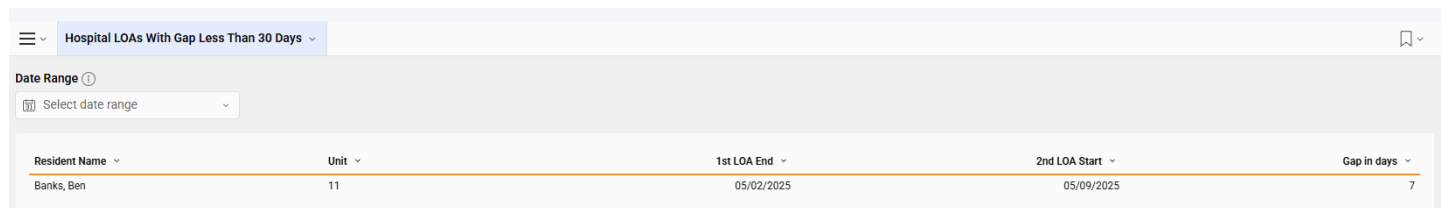
- **Readmission Risk Visibility**
 - Identifies residents with 2+ hospital LOAs where the gap between stays is less than 30 days
 - Helps monitor care transitions, discharge planning, and follow-up effectiveness
- **Actionable Data**
 - View:
 - Resident Name
 - Unit
 - 1st LOA End
 - 2nd LOA Start
 - Gap in Days
- **Flexible Filtering**
 - Date range filter (default: last 6 months)
 - Results update dynamically
- **Usability**

NEXT Release Notes

- Export to PNG, Excel, or PDF is available

Impact

This enhancement provides clear visibility into short-gap hospital readmissions, enabling proactive intervention, improved resident outcomes, and better alignment with healthcare quality measures.



Resident Name	Unit	1st LOA End	2nd LOA Start	Gap in days
Banks, Ben	11	05/02/2025	05/09/2025	7

Missed Services by Provider

We've added a new **Missed Services by Provider** report to help Clinical Providers quickly identify trends in missed services and monitor provider performance.

What's New

A **bar graph widget** that displays missed services by provider within a selected date range, making it easier to spot gaps in service delivery.

Key Capabilities

- **Provider-Level Breakdown**
 - Displays each provider and their total number of missed services
 - Providers are ranked in **descending order**, with the highest at the top
- **Trend Indicators**
 - Compares current period to the previous period
 - Visual indicators show:
 - Upward trend (increase in missed services)
 - Downward trend (decrease in missed services)
- **Interactive View**
 - Hover over bars to see total missed service counts per provider

Data & Logic

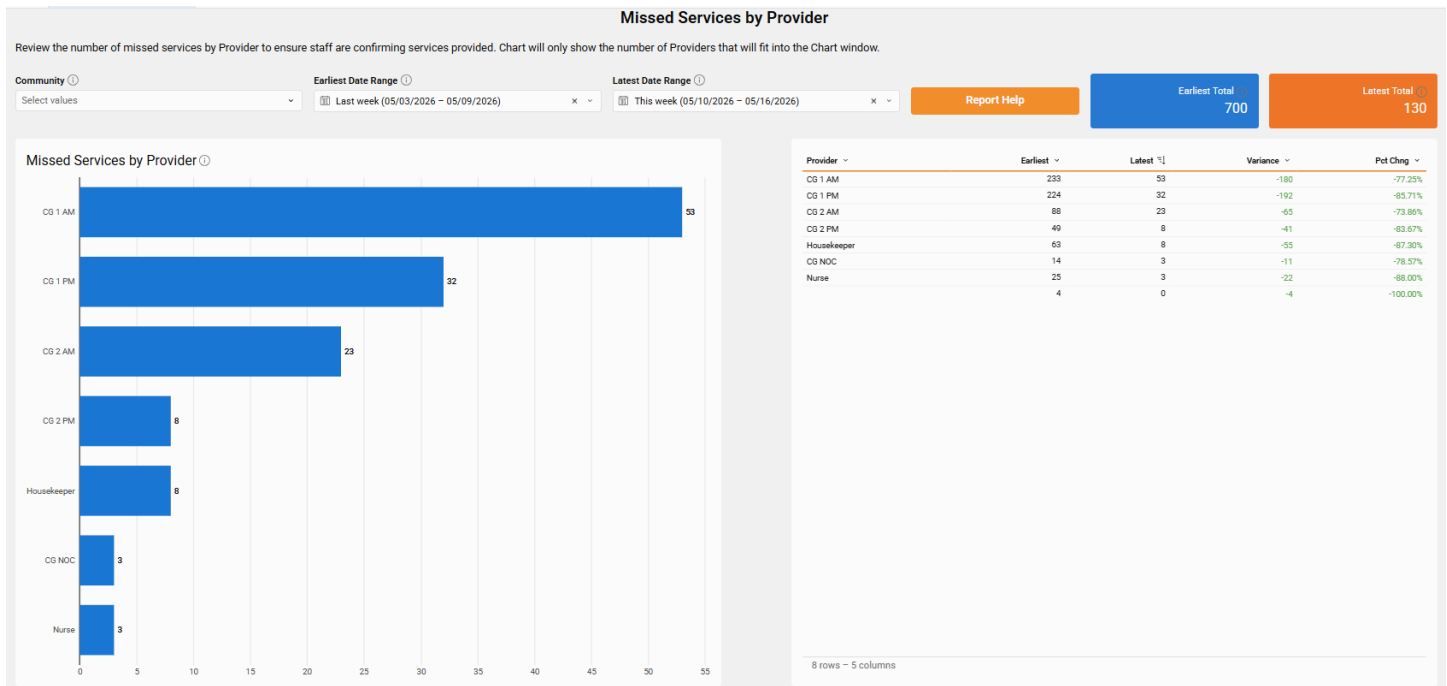
- A service is considered **missed after the provider's shift ends**
- Data is sourced from: **Schedule** → **Past** → **Missed Status**
- Includes only providers with **active units and services**

Availability

- Available at the **community level only**



NEXT Release Notes



Print Evaluation – Include Points Option

We've added a new **Include Points** option when printing evaluations from the resident record, giving you control over whether scoring details appear in printed output.

What's New

You can now choose to **include or exclude scoring details** (points, section totals, and overall scores) when printing an evaluation. This supports sharing evaluations externally without exposing scoring models, while still allowing full detail for internal use.

Where to Find It

Medical → Resident Profile → Evaluations → Open Evaluation → Actions → Print Evaluation

How It Works

- A new **Include Points** checkbox is available in the Print Evaluation modal
- **Unchecked**
 - Printed evaluation **excludes all scoring details** (points, section totals, overall scores)
 - Clean formatting is preserved with no gaps or placeholders
- **Default: Checked:**
 - Printed evaluation **includes all scoring details**, matching current behavior

Key Details

- Applies **only to printed output** (print/PDF)
- **No changes** to:
 - Evaluation calculations
 - Stored scores

NEXT Release Notes

- Level of Care determination
- On-screen display in the resident record
- Checkbox state resets each time the modal is opened

Print Evaluation

Print Type ▼

Print Orientation
Portrait ▼

Include Services

Include Points

This evaluation will be printed in draft mode because it has not been completed.

Cancel

Print

This update makes it easier to share evaluations externally while keeping internal scoring logic protected.

CRM Enhancements

CRM Interest Levels

We've introduced **configurable Interest Levels** in CRM, enabling teams to better prioritize prospects, organize pipelines, and improve reporting consistency.

What's New

You can now **create, manage, and assign Interest Levels** (e.g., Hot, Warm, Cold, Deposit Pending) to prospect records, providing clear visibility into move-in likelihood and follow-up priorities.

Where to Find It

- **Configuration:** Admin → CRM → Configurations → Sales Statuses

Sales Statuses

Status: Enabled ▼ New

Display Order	Name	Color	Description	Status
1 ▲ ▼	Warm	●	Warm- 30-60 day before move-in	Enabled
2 ▲ ▼	Cold	●	90+ Days until Move-In	Enabled
3 ▲ ▼	Hot	●	Move in 30 days or less	Enabled

NEXT Release Notes

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

Edit Profile ✕

Referral Source*
abc hospital ▼

Contact Owner*
Crystal Org Admin ▼

Preadmission #

Sales Status
Hot ▼

First Name*
Henry

Key Capabilities

- **Customizable Interest Levels**
 - Create, edit, and delete levels at the community level
 - Add descriptions and **color-code** each level for quick visual identification
- **Prospect Prioritization**
 - Assign an interest level to each prospect
 - Quickly identify high-priority leads and focus follow-up efforts
- **Data Consistency**
 - Structured field supports more reliable pipeline tracking and reporting
 - Supports migration of legacy CRM data

Impact

This enhancement restores a key CRM capability and strengthens pipeline management by making it easier to track prospect readiness, prioritize outreach, and evaluate sales performance across communities.

Additional Notes

- Configurable by **Community Manager and above**

Integrator API Updates

We've expanded the **Integrator API** to provide more complete census, clinical notes, note category, and vitals history data for external systems.

Updated: [Get All Units](#)

The existing **Get All Units** endpoint now supports community census use cases by returning all units in a community, not only enabled units.

What's included

NEXT Release Notes

- Optional filter to return enabled units only
- Unit details, including floor plan, station, rates, square footage, care level, privacy status, and service status
- Occupancy and reservation status
- Move-in and move-out dates
- Current resident ID(s) assigned to occupied units
- Permission checks for census data access
- Error responses for unauthorized access and disabled communities

New: Get Note Categories

A new endpoint allows integrators to retrieve available note categories for a client or brand.

Endpoint: GET /api/ext/communities/{communityId}/note-categories

What's included

- Category ID
- Category name
- Enabled/disabled status

This allows integrators to use valid category values when filtering notes without hardcoding client-specific options.

New: Get Resident Notes

A new endpoint allows integrators to retrieve resident clinical notes.

What's included

- Filtering by encounter date range
- Filtering by note category
- Paging support
- Newest notes returned first
- Free Form notes only
- Permissions scoped to resident medical record access

New: Post Resident Notes

A new endpoint allows authorized integrators to create Free Form clinical notes in a resident's record.

What's included

- Required note text and category
- 65,000-character note limit
- Automatic category creation when a valid new category is provided
- Error handling for disabled categories, invalid residents, missing fields, and invalid date formats
- Created notes appear in the resident's Clinical Notes / Progress Notes section

New: Vitals History

A new endpoint allows integrators to retrieve historical vitals readings, instead of only the most recent reading per type.



NEXT Release Notes

What's included

- Date filtering
- Vitals type filtering
- Pagination
- Medical data permission enforcement
- 404 responses for invalid or cross-community residents

EMAR

Dashboard – PRN Administrations Widget

We've introduced a new **PRN Administrations** widget on the eMAR Dashboard to provide visibility into recent PRN activity, helping teams monitor administration patterns, follow-ups, and outcomes.

What's New

The **PRN Administrations** widget displays recent PRN administrations in a centralized, actionable view.

Where to Find It

EMAR → **Dashboard** → **Configure Widgets** → **PRN Administrations**

Key Capabilities

PRN Administration Visibility

- View PRNs administered within the **last 90 days**
- Includes:
 - Unit and Resident
 - Medication and Instructions (with hover details)
 - Date/time given and administering user
 - Reason for administration
 - Follow-up status

Follow-Up Tracking

- Clearly shows follow-up status:
 - Scheduled
 - Incomplete
 - Complete
 - No Follow-Up
- Clickable statuses open the **Follow-Up modal** for review or completion

Filtering & Sorting

- Filter by:
 - Timeframe (default: Last week)

NEXT Release Notes

- Follow-up status
- Reviewed status
- Search with real-time results and highlighting
- Sortable columns and pagination support

Unit	Resident	Medication	Datetime Given	Reason	Follow-Up	Reviewed
19	Blackhart, Hudson	Ativan Give 1 tablet every 4 hours as needed for anxiety.	05/11/2026 13:55 mkern@jasper	restlessness	Scheduled	05/11/2026 13:55 mkern@jasper Undo
19	Blackhart, Hudson	Ativan Give 1 tablet every 4 hours as needed for anxiety.	05/11/2026 13:55 mkern@jasper	restlessness	Scheduled	05/11/2026 13:55 mkern@jasper Undo
04	Hedman, Heidi	Ativan Take one tablet by mouth once daily as needed for anxiety	05/11/2026 13:54 mkern@jasper	anxiety	Scheduled	<input type="checkbox"/>
02	Holworth, Katherine	Tylenol Take 2 tablets every 4 hours as needed for headache	05/11/2026 13:54 mkern@jasper	pain	Scheduled	<input type="checkbox"/>

Review Functionality (Optional)

When enabled, users can **mark PRN administrations as reviewed** directly from the widget.

- Checkbox to mark records as reviewed
- Captures **date/time and user** who completed the review
- Option to **undo review** (by the original reviewer only)

Permissions & Settings

- Community setting: **Enable Review on PRN Administrations Widget**

Additional Enhancements

- **Administration History (MAR/TAR)** now shows PRN review status when enabled
- **PRN History Report** includes review details (reviewer and timestamp)

PRN History

ID 80203

PRN History Period from 05/01/2026 to 05/31/2026

Sector(s): Care Home

Program(s): All Programs

Station(s): All Stations

Physician Order Base Type(s): All Physician Order Base Types

Station	Client Name	Medication Name	Instruction	Route	Amt. Given	Reason	Give Notes	Admin. Date	Reviewed
Not specified	Blackhart, Hudson	Ativan (LORazepam) 0 (1 MG)	Give 1 tablet every 4 hours as needed for anxiety.	PO	1.0	restlessness	Add to MAR/TAR Entry	05/11/2026 13:55	Reviewed: 05/11/2026 13:56 Myriah Kern
Medications for Blackhart, Hudson: 1									
Grand Total:		Residents: 1	Medications: 1						

Impact

This feature improves oversight of PRN medication usage by making it easier to:

- Monitor recent administrations
- Track and complete follow-ups
- Ensure accountability through review tracking
- Identify trends and support safe, effective medication management

Edit Modal Layout Improvements

We've updated eMAR order editing to provide a more consistent experience across **Manage Order > Edit** and **Receive Orders > Validation Result > Edit**.

What's Improved

- Standardized the **Instructions** section across both edit modals
- Improved field spacing, alignment, sizing, and overall readability

NEXT Release Notes

- Added a shared layout for familiar controls across order edit workflows
- Moved key controls from the Receive Orders main page into the edit modal:
 - Alternative Administration
 - High Alert Medication
 - Mark as Supply

Where This Applies

- **EMAR** → **MAR/TAR** → **Pass** → **Resident** → **Manage** → **Edit**
- **EMAR** → **Orders** → **Medication Profile** → **Resident** → **Manage** → **Edit**
- **EMAR** → **Orders** → **Receive Orders** → **Validation Result** → **Edit**

Included Fields

The updated Instructions layout includes fields such as:

12 Hour Nasal Decongestant ⓘ
(Pseudoephedrine HCl ER)
Take one tablet by mouth twice daily.

MAR
First Schedule Date: March 26, 2026
PRN - 0
0800 - 0
1600 - 0

[View History](#)

Take one tablet by mouth twice daily.

Community Instructions Indication

Route --Select-- Form --Select-- Alt. Administration --Select--

Source Pharmacy GP of SE FL - Physician

High Alert Medication
 Mark as Supply
 Psychotropic
 Set PRN Frequency

- Instructions and Community Instructions
- Indication, Route, Form, Source Pharmacy
- Physician
- High Alert Medication and related warning options

High Alert Medication IsDoubleSign

Mark as Supply

Warning Message Confirm right person, right dose

Confirm right person, right dose
Administer by Nurse Only

- Mark as Supply
- Psychotropic and PRN frequency options, when applicable

Receive Orders Page Updates

The Receive Orders page layout has been cleaned up so order details are easier to scan. Rows now adjust to fit content, and the Instructions column is more streamlined.

NEXT Release Notes

Items removed from main screen and added to the Edit window:

- Alternative Admin
- Alert Medication
- Mark as Supply
- Psychotropic

<input type="checkbox"/>	Resident	Medication	Instructions	Schedule	Pharmacy	Validation Results
<input type="checkbox"/>	Blackhert, Hudson Unit 19	12 Hour Nasal Decongestant (Pseudoephedrine HCl ER) (120 MG) DNI: 00582300150 RX: ATM103 Drug Information	Take one tablet by mouth twice daily. Bio Test	MAR Start: March 28, 2028 0800 - 0 1600 - 0	GP of SE FL #	New Order - Review

Free-Text Prescriber Enhancement

We've streamlined the order editing experience in EMAR by aligning the Physician field with the **free-text prescriber setting**, reducing redundancy and improving workflow efficiency.

What's Improved

When **Enable free-text prescriber** is turned on, the **Physician drop-down menu is hidden** on order edit screens, allowing users to rely solely on a free-text entry.

Where This Applies

- EMAR → MAR/TAR → Pass → Resident → Manage → Edit
- EMAR → Orders → Medication Profile → Resident → Manage → Edit
- EMAR → Orders → Receive Orders → Validation Result → Edit

How It Works

- **Setting Enabled**
 - Physician drop-down is **hidden**
 - Free-text Physician field is **visible and used for entry**
- **Setting Disabled**
 - Physician drop-down is **visible**
 - Free-text Physician field is **hidden**
- **Data Integrity**
 - Existing physician selections are **preserved**, even when hidden

Add to MAR/TAR

- Physician drop-down **remains available** regardless of setting
- Supports **Standing Order creation** using structured selection

Label Updates

- Setting renamed to: **"Enable free-text prescriber"**
- "Other" (free-text Physician) field relabeled to: **"Physician"**

EMAR Audit Enhancements

We've expanded EMAR auditing to improve visibility into key order updates, including pharmacy cancellations and PRN frequency changes.

NEXT Release Notes

Cancel Order Audit Tracking

A new audit type, **Cancel Order**, captures when a user accepts a cancel (CA) message from **Receive Orders** and the order is successfully cancelled.

Captured details include:

- Date and time the cancel was accepted
- User who accepted the cancel message
- Order identifiers (Rx number and MEID/FON)
- Resident details (name, chart number, MAR ID)
- Medication and instructions
- Comment summarizing the action

PRN Frequency Audit Tracking

Changes to **PRN Frequency** are now tracked in both **eMAR Audit** and **Manage Order History**.

- Logs when PRN Frequency is updated
- Captures:
 - Date and time of edit
 - User who made the change
 - Order identifiers (Rx and MEID)
 - Resident name and chart number
 - Updated PRN Frequency value (e.g., "240 mins")

Manage Order History

- PRN Frequency changes now appear alongside other order edits
- Includes:
 - Date and time of edit
 - User
 - Field: PRN Frequency
 - Original value and new value (with units)

Where to Find It

- **EMAR** → **Audit**
- **EMAR** → **MAR/TAR** → **Pass** → **Resident** → **Manage** → View History
- **EMAR** → **Orders** → **Medication Profile** → **Resident** → **Manage** → View History

Impact

These updates provide clearer audit trails for both pharmacy-driven cancellations and PRN frequency changes, improving traceability, compliance, and confidence in order management workflows.

Medication Classifications Widget – Default State Update

We've updated the **Medication Classifications** widget on the EMAR Dashboard to improve clarity and user control when loading data.

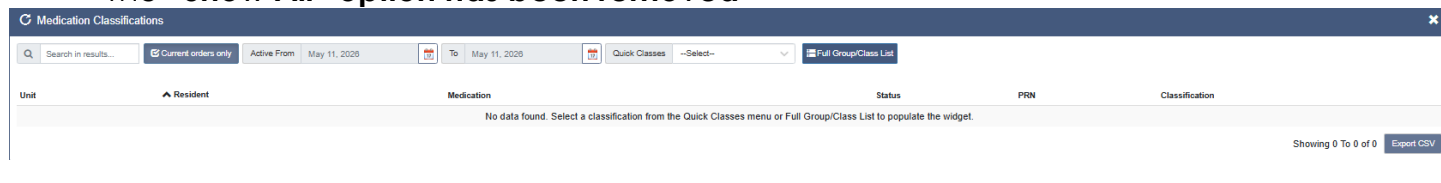
NEXT Release Notes

What's Changed

- The widget now **loads with no data by default**
- A placeholder message is displayed until a classification is selected:

“No data found. Select a classification from the Quick Classes menu or Full Group/Class List to populate the widget.”

- The **Quick Classes menu defaults to no selection**
- The **“Show All” option has been removed**



Impact

This update prevents unnecessary data loading and ensures users intentionally select classifications, resulting in a more focused and efficient dashboard experience.

Fixes

We've released a series of improvements to stabilize workflows, improve data accuracy, and resolve issues impacting scheduling, units, service delivery, and integrations.

Clinical Schedule Performance Improvements

We've improved performance in the **Clinical** → **Schedule** module to deliver a faster, more responsive experience across all tabs.

What's Improved

- Faster **initial load time** when opening the Schedule module
- Improved responsiveness when **switching between tabs**:
 - Shift Status
 - Service Alerts
 - Not Completed
 - Active
 - Past
 - Service Delivery
- Performance gains in the **Shift Status** tab

Impact

Users should experience smoother navigation and reduced wait times, helping support more efficient care delivery and daily workflows.

Clinical & Resident Management Improvements



NEXT Release Notes

- Resolved an issue preventing users from **editing resident units or transferring residents** in migrated communities
- Improved stability in **Service Delivery scheduling**, ensuring services populate and schedule correctly
- Fixed an issue where **deleted residents appeared in filters** within Schedule → Service Delivery

Resident Notes Permission Enhancements

We have enhanced Resident Notes security and administrative oversight by allowing Community Managers and Org Admin users to edit and delete notes created by other users when needed for data accuracy, documentation corrections, and operational management. All note updates and deletions continue to be tracked within Activity Tracking area to support accountability and audit visibility.

Navigation: Resident → Medical → Notes

Updated Permission Behavior

The following rules now apply for Resident Notes:

- All users can create, view, edit, and delete their own notes
- Community Managers and Org Admin roles can also edit and delete notes created by other users
- Users without elevated permissions cannot edit or delete notes created by others

Improved Experience & Security

- Prevents unauthorized edits and deletions
- Supports community leadership in maintaining accurate and up-to-date resident documentation
- Reinforces a more consistent and intuitive role-based access experience

Housing & Units

- Fixed inconsistencies where **sub-units did not inherit updated station values** from parent units
- Ensured **unit station updates display correctly** across unit details, listings, and resident views
- Improved data consistency for unit assignments used across EMAR and other modules

EMAR Improvements

- Fixed an issue where the **Unit Station filter on Receive Orders** did not return results correctly
- Improved filtering accuracy so orders display based on selected station
- Enhanced overall reliability of order visibility and filtering workflows

Service Delivery Accuracy

- Updated the **Minutes column** to reflect **actual minutes** for completed services

NEXT Release Notes

- For **not completed services**, minutes now display as **0**, improving reporting accuracy and clarity

CRM Integration

- Fixed an issue where **duplicate prospects were created** when updates were received for previously rejected referrals
- Updates now correctly apply to the existing prospect record when matching lead IDs are present

Impact

These updates improve system reliability across clinical, housing, eMAR, and CRM workflows—reducing errors, ensuring accurate data display, and supporting smoother day-to-day operations for communities