Release Notes 2026.7

This release delivers enhancements across **Clinical, CRM, and Integrations** that improve usability, strengthen data integrity, and streamline everyday workflows. From expanded Activity Tracking and flexible service scheduling to richer Integrator API capabilities and CRM standardization, these updates help teams work more efficiently while maintaining accurate, consistent resident and prospect information.

Highlights

Clinical Workflow Enhancements – New Census Types and Census History management, flexible service time entry, larger Service Plan views, Back/Next navigation within the Service modal, a new Hospitalization Rate Report, and expanded Activity Tracking provide greater efficiency and visibility across clinical workflows.

Integrator API Expansion – New endpoints for resident vitals and allergies, richer resident data, enhanced webhook capabilities, and improved duplicate handling make it easier for external systems to stay synchronized with Eldermark NEXT.

CRM Standardization & User Experience – The terminology update from **Lead** to **Prelead**, new **Sales Status Categories**, improved reservation date handling, and marketing automation reliability strengthen CRM consistency and prepare the platform for future reporting and automation.

Ideas Portal – Product Requests have moved to a new Ideas Portal within Eldermark Spark, giving users a centralized place to submit, browse, and vote on product ideas.

Together, these enhancements improve usability, strengthen reporting and integrations, and provide a more consistent experience across Eldermark NEXT—helping your teams work more efficiently while laying the foundation for future platform capabilities.

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Activity Tracking Update

Print Configuration: Activity Tracking

Changes made to Clinical Print Configuration settings are now captured in Activity Tracking, giving administrators full visibility into who updated a community's print settings, what changed, and when it occurred.

What's New

Updating the Print Format selection is now logged as an Update activity, capturing both the previous and new values for Change Tracking:

- Print Format changes are recorded with the prior selection and the newly saved selection.
- Logged activity reflects only saved changes — no entry is created until a change is actually persisted to the community's settings.

What This Means

- Print Configuration activity now appears alongside other tracked changes in the Organization and Community Activity Tracking listings, keeping audit history in one consistent place.
- Supports compliance and troubleshooting by providing a clear, reliable audit trail for print setting changes that affect generated documents such as evaluation reports and care plans.

Integration Integrator API Enhancements

This release expands the Integrator API with new ways to manage resident contact data, more flexible webhook delivery, better visibility into failed webhook messages, and expanded meal planning data — giving integrated systems more complete, reliable access to resident information.

Update Resident Contacts

Integrators can now update an existing resident contact directly using its Contact (Individual) ID, instead of deleting and recreating the record to reflect changes.

What's included:

- Updates to name, call order, relationship, emergency flag, address, and notes
- Partial updates — only the fields included in the request are changed; everything else stays as-is
- Address is treated as a full replacement, so all address fields should be sent together when updating an address
- Clear error responses when a contact isn't found or falls outside the integrator's authorized scope

Add and Update Contact Phone Numbers & Emails

New endpoints let integrators manage phone numbers and email addresses for existing resident contacts, keeping contact details synchronized without creating duplicate records.

What's included:

- Adding new phone numbers and email addresses, with duplicate values automatically skipped
- Replacing a contact's full list of phone numbers or email addresses in a single request
- Validation for U.S. 10-digit phone numbers — international numbers and extensions aren't yet supported and will return a validation error
- Every response returns the contact's complete, up-to-date phone and email lists

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Pull-Based Webhook Delivery

Integrators that can't receive standard push webhook notifications now have an alternative way to stay in sync with resident data changes.

- Recent resident data changes can be requested on demand via an API call, rather than relying solely on inbound push notifications
- Supports integrators whose systems aren't set up to receive webhook requests
- Change data is consistent whether it's delivered by push or retrieved by pull

Failed Webhook Messages List

A new Failed Webhooks view gives administrators visibility into webhook messages that failed to deliver, making delivery issues easier to spot and resolve.

Navigation: Clinical → Organization → Failed Webhooks

What's included:

- A list of failed and retrying webhook messages for the organization, showing integrator, subscription, event type, status, attempt count, and key timestamps
- Sorting on every column and filtering by integrator, event type, status, or date range
- Server-side pagination for fast, reliable performance even with large volumes of failed messages

Meal Plan Data in the Resident Medical Domain API

Meal Plan information is now included in the Diets section of the Resident Medical Domain response, giving connected meal-planning systems like eMenu access to a resident's current meal plan.

What's included:

- Active meal plan records returned within the Diets response
- Deleted meal plan records automatically excluded

What This Means

- Integrators can keep resident contact information accurate over time, without duplicate records piling up from repeated create requests.
- Partners who can't receive push webhooks can still stay current on resident data changes using pull-based requests.
- Failed webhook deliveries are easier to identify and troubleshoot, reducing the risk of silent data sync issues.

Clinical

Cares Enhancement: More Prominent My Assignment Button

The My Assignment button in Daily Cares is now more visually prominent, making it easier for staff to return to their assigned care tasks instead of accidentally closing out of the workflow.

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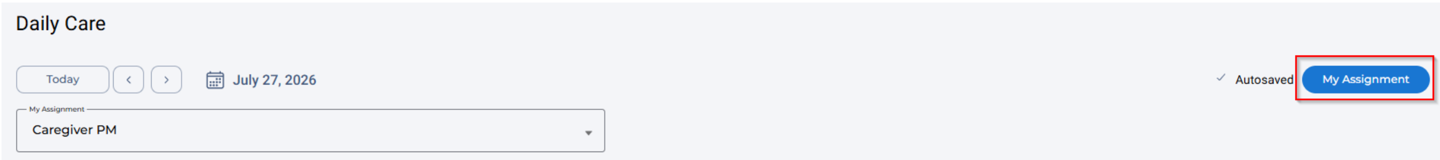
Navigation: Daily Cares → My Assignment



What's New

- The My Assignment button has been restyled to stand out more clearly on screen, consistent with Eldermark design standards.
- Improved visibility applies across desktop, tablet, and mobile views.
- Button text remains readable at supported zoom levels, with accessible color contrast and unchanged focus and keyboard navigation behavior.
- Underlying functionality is unchanged — selecting My Assignment continues to take staff directly to their assigned care tasks.

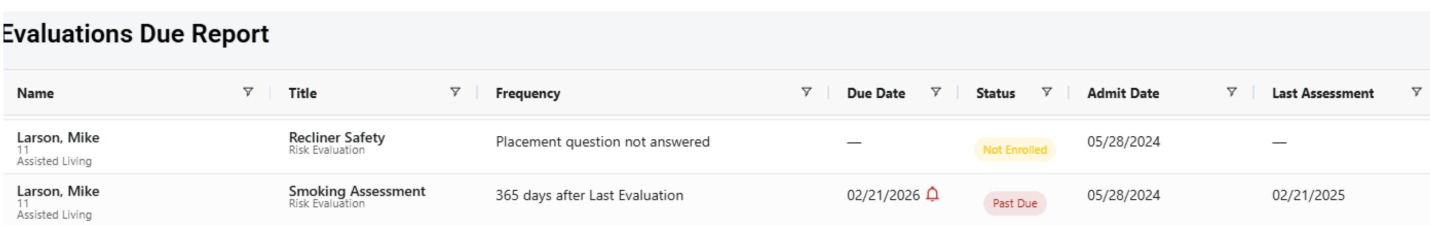
What This Means

- Staff are less likely to mistake the browser or application close button for My Assignment, reducing accidental exits from Daily Cares.
- Returning to an assigned workload takes fewer steps, cutting down on navigation friction during care documentation.
- Mobile and tablet users, who have less screen space to work with, get the same improved discoverability as desktop users.

Evaluation Due Report: Optional Columns

The Evaluation Due Report now offers optional columns for Admission Date, Discharge Date, and Date of Last Evaluation, giving clinical users more context for auditing and managing evaluations without leaving the report.

Navigation: Clinical → Reports → Evaluation Due Report



Evaluations Due Report

Name	Title	Frequency	Due Date	Status	Admit Date	Last Assessment
Larson, Mike 11 Assisted Living	Recliner Safety Risk Evaluation	Placement question not answered	—	Not Enrolled	05/28/2024	—
Larson, Mike 11 Assisted Living	Smoking Assessment Risk Evaluation	365 days after Last Evaluation	02/21/2026	Past Due	05/28/2024	02/21/2025

What's New

- **Admission Date:** Shows the resident's admission date.
- **Discharge Date:** Shows the resident's discharge date when applicable; active residents display a blank value.
- **Date of Last Evaluation:** Shows the most recent completed evaluation date for the same evaluation type as the due record — for example, a due Functional Assessment shows the last completed Functional Assessment, not the most recent evaluation of any type.

- All three columns are optional and hidden by default, added or removed using the existing column picker; the report's default layout is unchanged.
- New columns support standard sorting, filtering, resizing, export, and print functionality, consistent with other columns on the report.

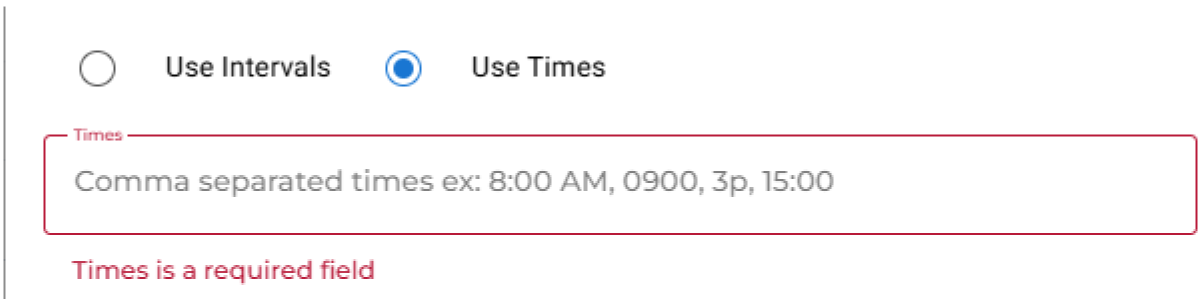
What This Means

- Clinical users can audit and research evaluations due without switching screens to look up admission, discharge, or prior evaluation dates.
- Because Date of Last Evaluation matches the evaluation type on each row, it gives more meaningful context than a generic "most recent assessment" date.
- Users who don't need the extra detail see no change — the report's default view and existing functionality remain exactly as before.

Service Plan & Service Catalog: Flexible Time Entry

Scheduled service time fields now accept a wider range of common time formats and automatically normalize them to the community's default time display, so staff can enter times faster without worrying about exact punctuation or spacing.

Navigation: Resident record → Medical/Service tab → Evaluations/Service Plan or Plan of Care | Clinical → Configuration → Service Catalog → Services → Edit Service → Schedule



What's New

- Time entry no longer requires a colon, a leading zero, a space before AM/PM, or specific capitalization — entries like 0700, 07:00, 0700AM, 7:00 AM, and 7a are all accepted.
- **Military time communities:** accepted formats such as 0700, 07:00, 7:00AM, and 7A all save and display as 0700.
- **AM/PM time communities:** accepted formats such as 0700, 7a, 07:00AM, and 07:00 AM all save and display as 7:00 AM.
- Comma-separated multiple time entries continue to work as before, with each time normalized independently (e.g., 7a,12p,1700).
- Invalid entries still display a clear validation message, and the Service Catalog Times field's help text has been updated to reflect the newly accepted formats.

What This Means

- Staff can enter service times faster and more naturally, without needing to remember exact formatting rules.

- The same flexible entry works consistently whether scheduling from a resident's Service Plan or Plan of Care, or configuring times in the Service Catalog.
- Times are always normalized to the community's configured display format, so schedules stay consistent regardless of how a time was typed in.

Resident List: Column Preferences Now Persist Across Devices

Main Resident List column preferences are now saved to each user's profile in the database, so the same view follows a user to any device or browser — no more reconfiguring columns after switching workstations.

Navigation: Residents → Main Resident Tab → Column Settings

What's New

- Column show/hide selections and column order are saved at the user level rather than tied to a single browser or device.
- Preferences load automatically on login, regardless of which supported device or browser the user signs in from.
- Updating columns on one device carries over the next time the user logs in anywhere else, including after logout, hard refresh, or clearing browser cache.
- New users receive the default column configuration on first login, and newly added columns appear in a default state without overwriting existing saved preferences.
- Preferences remain scoped strictly to the logged-in user, with no visibility or sharing across users.

What This Means

- Care staff moving between carts, rooms, or offices see a consistent Resident List view no matter which device they use.
- Admins working across office and remote environments no longer need to redo their column setup after switching machines.
- This replaces the browser-based persistence introduced in a prior release, extending the same convenience across every device tied to a user's login.

Service Plan: More Visible Records on Screen

The Service Plan grid now snaps to the bottom of the browser window instead of stopping after a handful of rows, so clinical users can see more service records at once with less scrolling.

Navigation: Resident Profile → Services → Service Plan (Active and All Services tabs) | Resident Profile → Medical → Evaluations → Service Plan

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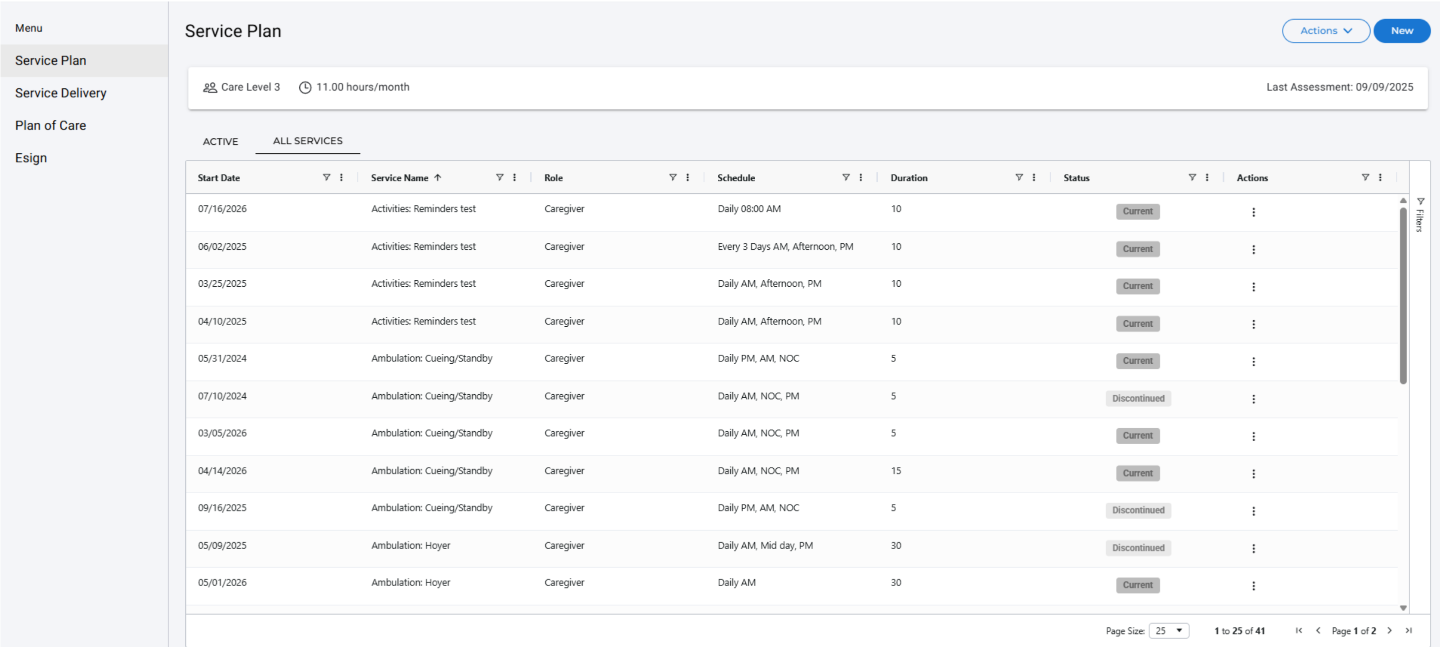

What's New

- The Service Plan grid now extends to the bottom of the browser window on both the Active and All Services tabs, instead of showing only about six rows before scrolling.
- The number of visible rows adjusts automatically based on browser window size and zoom level — zooming out reveals more rows, zooming in shows fewer.
- The grid expands vertically before internal scrollbars appear, and never overlaps filters, action buttons, pagination, or the page footer.
- Existing columns, formatting, sorting, filtering, row actions, and status badges are unchanged, as is keyboard navigation and screen reader support.

What This Means

- Nurses and care coordinators can review and compare more active and historical services at a glance during evaluations and documentation.
- Less internal grid scrolling means faster comparisons between active and discontinued services.
- The Service Plan grid now behaves more like the Resident Notes listing, giving a more consistent experience across the platform.

New: Hospitalization Rate Report

A new Hospitalization Rate Report is now available in Clinical Reports, giving clinical teams visibility into hospitalization trends and leave-of-absence activity to support operational oversight and resident care monitoring.

Navigation: Clinical → Reports → Hospitalization Rate Report

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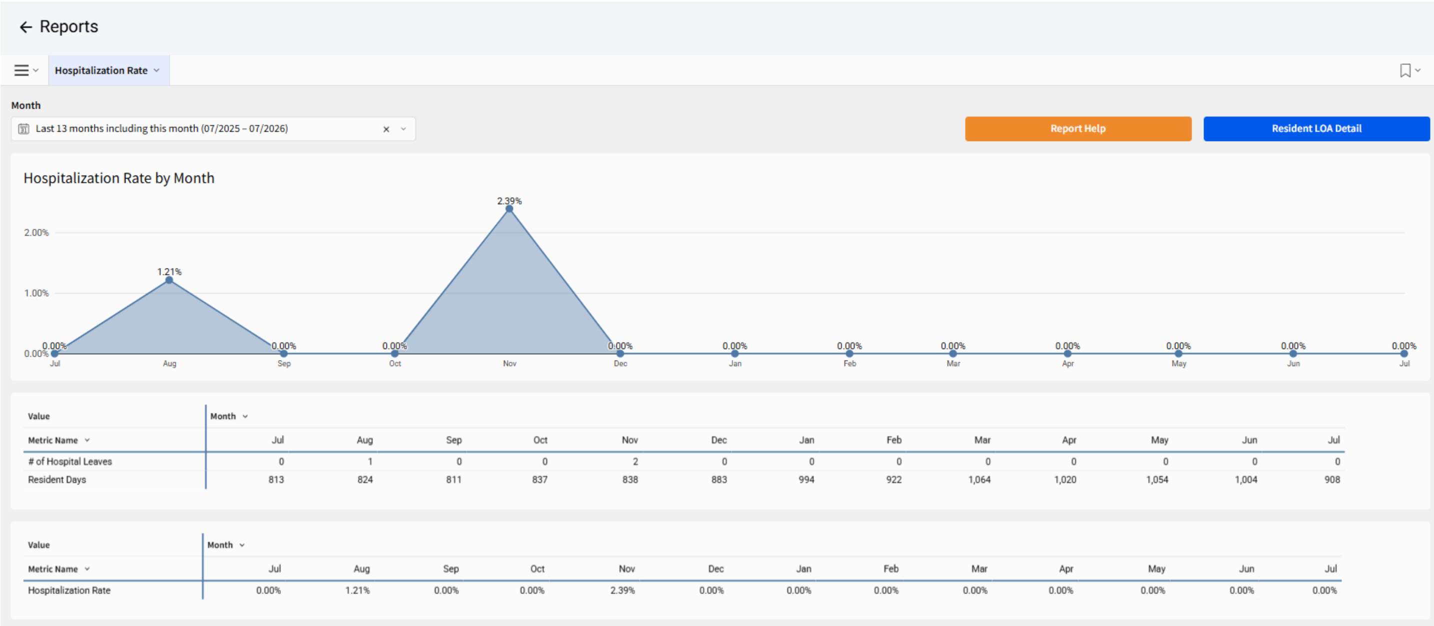
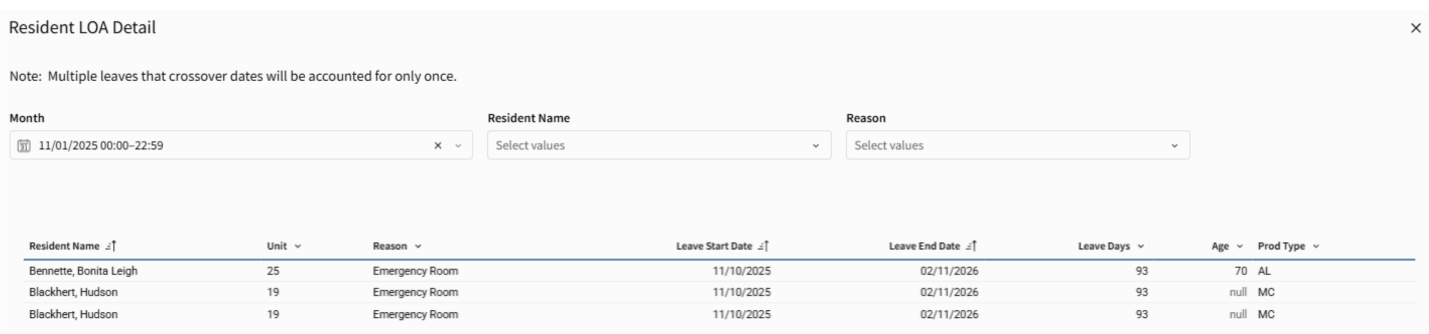


Metric Name	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
# of Hospital Leaves	0	1	0	0	2	0	0	0	0	0	0	0	0
Resident Days	813	824	811	837	838	883	994	922	1,064	1,020	1,054	1,004	908

Metric Name	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Hospitalization Rate	0.00%	1.21%	0.00%	0.00%	2.39%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

What's New

- A new Hospitalization Rate Report card appears on the Clinical Reports page, under the Census category; selecting it opens the report detail page.
- The report shows # of Hospital Leaves and Hospitalization Rate by month, calculated as hospital leaves per 1,000 resident days, along with Resident Days for the period.
- Data covers the trailing for two years and excludes deleted admissions, residents, and leave events.
- Filters narrow the charts and tables to the selected criteria.
- **Drill to detail:** Clicking a monthly # of Hospital Leaves value opens Resident LOA Detail, showing resident name, unit, leave reason, start and end dates, leave days, age, and product type for the selected filters.



Resident Name	Unit	Reason	Leave Start Date	Leave End Date	Leave Days	Age	Prod Type
Bennette, Bonita Leigh	25	Emergency Room	11/10/2025	02/11/2026	93	70	AL
Blackhert, Hudson	19	Emergency Room	11/10/2025	02/11/2026	93	null	MC
Blackhert, Hudson	19	Emergency Room	11/10/2025	02/11/2026	93	null	MC

- Resident LOA Detail data can be exported directly from the detail view using the export option in its menu.

What This Means

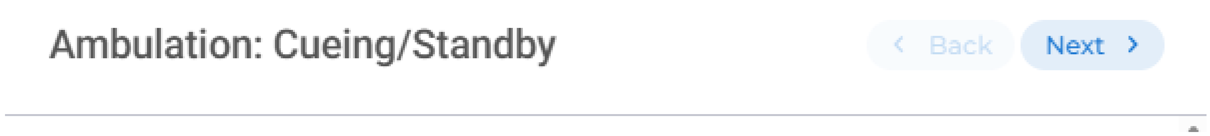
- Clinical Concierge users and above can monitor hospitalization trends and leave-of-absence activity without leaving Clinical Reports.
- Drilling into a specific month's hospital leaves gives resident-level detail to support follow-up and operational review.

- A consistent, industry-standard hospitalization rate calculation supports benchmarking and trend tracking over time.

Service Modal: Back/Next Navigation

The Service modal now includes Back and Next buttons, letting users move between service records — with any changes saved along the way.

Navigation: Resident record → Services tab → Service Plan (Active and All Services tabs) | Resident record → Medical tab → Evaluations → Evaluation → Services tab



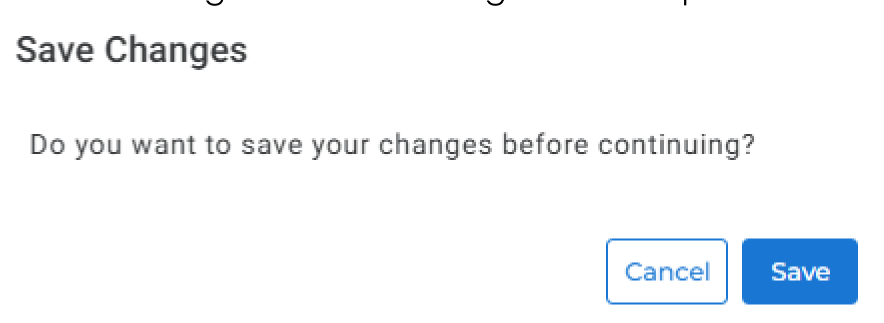
What's New

- Compact Back and Next buttons appear in the upper-right of the Service modal header.
- Back and Next move to the previous or next service record in the current grid order; each button is disabled when there's no record in that direction (first or last record).
- The header and navigation buttons stay fixed in place while the modal body scrolls.
- Buttons are keyboard accessible with visible focus states and include "Previous Service" / "Next Service" tooltips.

Save on Navigate

Back and Next now save changes instead of discarding them, so edits are no longer lost when moving between service records.

- If a field has been changed on the current service, selecting Back or Next now prompts to save those changes and then navigates to the previous or next record.



- If there are no changes, Back and Next navigate immediately with no extra prompt.
- If required fields are missing or validation errors exist, the user stays on the current service and sees the standard validation messaging instead of navigating.
- If a save fails, the user remains on the current service and sees the existing save error messaging.

What This Means

- Users reviewing multiple services can move through records quickly without repeatedly closing and reopening the modal.
- Validation and save errors still stop navigation when needed, so incomplete or invalid entries aren't silently saved.
- Navigation remains available and usable even when scrolling through longer service records.

Census History Modal: Improved Validation Messaging

Date overlap validation in the Census History modal now points to the specific field causing the conflict, instead of always flagging both the Start Date and End Date fields.

What's New

- Previously, when an entered date range overlapped an existing period, the error message appeared under both Start Date and End Date regardless of which field actually caused the conflict.
- The error message now displays only under the field(s) responsible for the overlap:
- If the new Start Date falls inside an existing period, the error shows under Start Date only.
- If the new End Date falls inside an existing period, the error shows under End Date only.
- If the new period fully contains or falls fully inside an existing period, the error shows under both Start Date and End Date.
- The same targeted messaging applies to open-ended entries (no End Date) that overlap an existing period.

What This Means

- Users can immediately see which date is causing a validation conflict, instead of having to check both fields.
- Correcting overlapping census history entries is faster and less confusing.

Service Catalog: Prevent Disabling a Care Service in Use

A Care Service can no longer be disabled while it's actively used in an evaluation, preventing broken evaluation workflows caused by disabling a service that's still needed.

Navigation: Clinical → Configuration → Service Catalog → Services → Edit Service

What's New

- When a user toggles a Care Service to disabled and saves, the system now checks whether the service is used in any evaluations.
- If the service is in use, a message displays listing where it's used — for example, "<Service Name> cannot be disabled because it is being used" followed by the evaluations referencing it — and the service is not disabled.
- If more than five evaluations reference the service, the list shows the first five plus a count of how many additional evaluations use it.

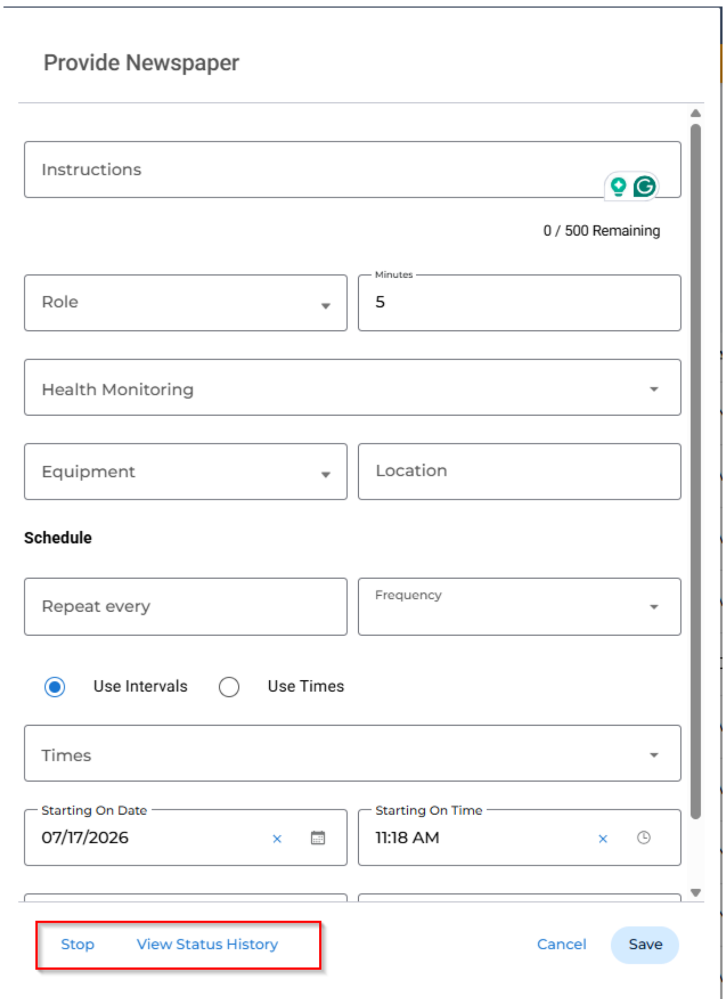
What This Means

- Configuration staff get a clear, specific reason when a service can't be disabled, instead of discovering the problem later through a failed autosave elsewhere in the system.
- Evaluations that rely on a Care Service are protected from silently breaking due to that service being disabled out from under them.

Schedule Service Alerts: Stop and View Status History

The Service modal opened from Clinical > Schedule now includes Stop and View Status History buttons, matching the functionality already available from the Resident record.

Navigation: Clinical → Schedule → Service Alerts → Select service/action menu → Service modal



What's New

- Opening a service modal from Clinical > Schedule now shows Stop, View Status History, Cancel, and Save, consistent with the same modal opened from the Resident record.
- **Stop:** Lets users stop the selected service directly from the Schedule modal.

- **View Status History:** Opens the status history for the selected service.
- Save continues to save valid changes as before.
- Button visibility follows the same user permissions and roles already used on the Resident record service modal, and no existing Resident record modal behavior has changed.

What This Means

- Clinical users working from Schedule > Service Alerts can stop a service and review its status history without navigating back to the resident's record.
- Service modal functionality is now consistent regardless of where it's opened from, reducing extra clicks and confusion during scheduling workflows.

Evaluation Listing: Completed By Column

The Evaluation Listing now shows a Completed By column, so users can see who is working on or finished an evaluation without opening it.

Navigation: Clinical → Resident record → Medical tab → Evaluations → Evaluation Listing

In Progress

Modified	Title	Score	Level	Status	Completed by
07/15/2026	Level of Care	2.25	Care Level 1	Draft	Myriah Kern

Finalized

Completed	Title	Score	Level	Status	Completed by
07/22/2026	Level of Care	6.75	Care Level 1	Finalized	Myriah Kern

What's New

- A new Completed By column appears on the Evaluation Listing, available for both the In Progress and Finalized views.
- **In Progress evaluations:** the column shows the user currently assigned to or actively completing the evaluation.
- **Finalized evaluations:** the column shows the user recorded in the evaluation's audit history as the one who completed it.
- Existing evaluation listing sorting, filtering, exports, and workflows are unchanged.

What This Means

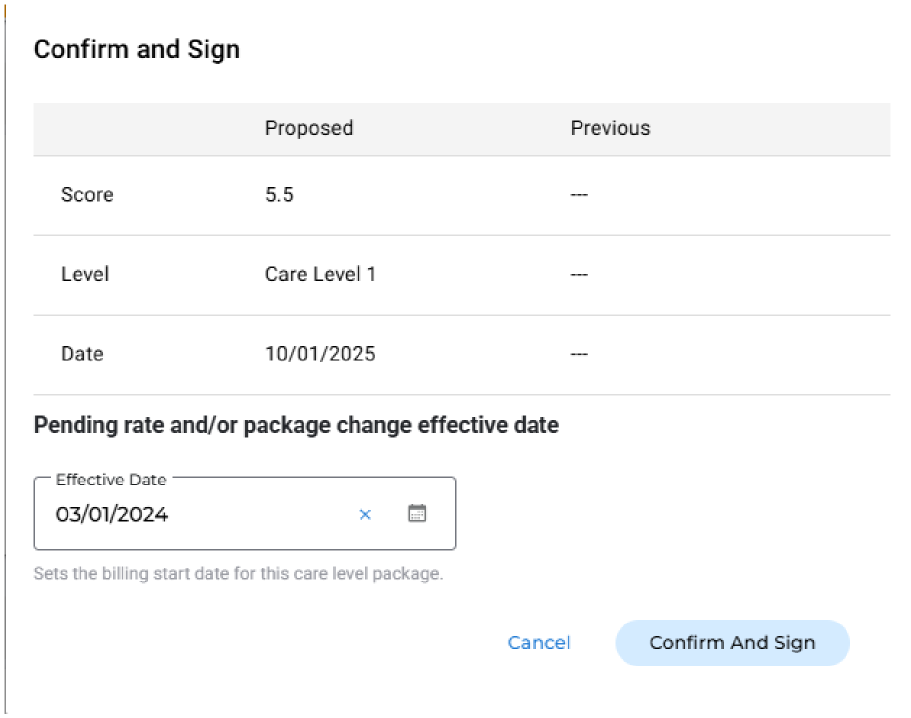
- Users can quickly see evaluation ownership and completion status directly from the listing, without opening each record.
- Supervisors and clinical leadership can review who's actively working on evaluations and audit completion patterns with fewer clicks.
- Reduces navigation for anyone who regularly reviews multiple evaluations at once.

Evaluation Sign Action: Pending Rate & Package Effective Dates

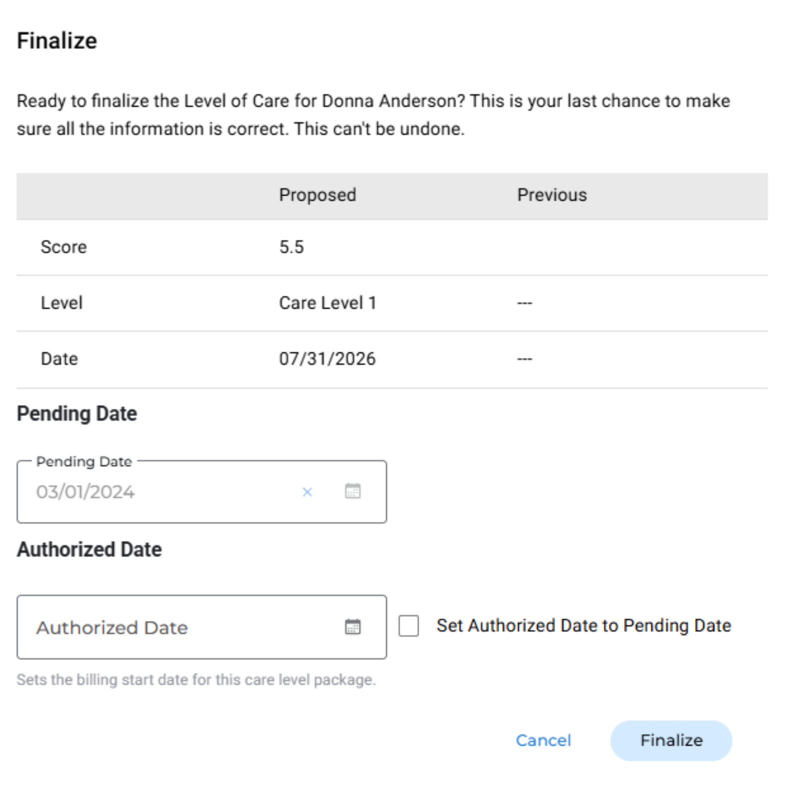
The Sign action on an Evaluation is now what triggers the effective date for a pending rate and/or package change when the Billing ETL sync is enabled. Previously, this effective date was triggered when the evaluation was Finalized.

Navigation: Resident record → Medical/Service tab → Evaluations

- **Sign triggers the effective date:** Signing an evaluation is now the action that triggers the effective date for any pending rate and/or package change, moving this trigger earlier in the workflow than the prior Finalized-based behavior.



- **Evaluations to Monthly Charges:** The monthly recurring charge tied to an evaluation is created upon Sign.
- **Updated on edit:** If a signed evaluation is edited in a way that results in a care level change, the monthly recurring charge is updated to reflect the new care level.
- **Updated during finalization:** If an edit made during the finalization process results in a change to the care level, the monthly recurring charge is updated again as part of finalizing the evaluation.



- **Consistent with Legacy:** This functionality is the same as when an assessment is completed in Legacy, with the addition of updating the monthly recurring charge if the evaluation is edited resulting in a change of assessed care level.

What This Means

- Pending rate and package changes now take effect as soon as an evaluation is signed, rather than waiting until it's finalized.
- Monthly recurring charges stay aligned with a resident's care level throughout the evaluation lifecycle, from signing through any edits and finalization.
- Communities already familiar with Legacy's assessment-driven billing behavior will see the same model in NEXT, now with automatic monthly charge updates when a care level change occurs.

Billing Sync ETL Setting

A Billing Sync ETL setting is now available at the Brand, Organization, and Community levels, giving communities that share data between NEXT and the legacy product through the Billing Sync ETL process a way to enable that sync directly in configuration.

Navigation: Brand, Organization, or Community Settings → Billing Sync ETL

What's New

- **Setting:** A Billing Sync ETL toggle is now available in the Brand, Organization, and Community configuration options.
- **Who should enable it:** This setting should be enabled for any community that uses the Billing Sync ETL process to share data between NEXT and the legacy product.

- **How to enable it:** Navigate to the Brand, Organization, or Community settings and toggle on Billing Sync ETL for the applicable communities.
- **When to enable it:** Enable this NEXT setting before the initial sync runs. It can be enabled in conjunction with a clinical migration, and there is no risk to enabling it in NEXT before the corresponding feature is enabled in the legacy product.

What This Means

- Enabling the setting before the initial sync helps ensure billing data syncs correctly between NEXT and the legacy product from the start.
- Because there's no risk to enabling it ahead of the corresponding Legacy feature, teams can turn it on alongside a clinical migration without added coordination.

New Role: Support Staff Plus

A new clinical role, Support Staff Plus, gives caregivers the same access as the existing Support Staff role plus the ability to create and document resident Notes and Leave of Absence records.

Navigation: Admin → User Permissions → Clinical Role

What's New

- Support Staff Plus is now available in the Clinical role dropdown in User Permissions and can be assigned using the existing role assignment process.
- Users with Support Staff Plus can create, save, and edit resident Notes they've entered, but cannot edit Notes entered by other users; Notes are attributed to the logged-in user and follow existing note security and audit rules.
- Users with Support Staff Plus can also create, save, and edit resident Leave of Absence records.
- Existing Support Staff users are not automatically converted to Support Staff Plus, and existing Support Staff permissions and functionality are unchanged.

Support Staff Plus					
Permissions		**Access Level**			
Module	**FEATURES**	**Create**	**Read**	**Update**	**Delete**
Clinical	Dashboard		Y	N	
Clinical	Resident - Profile - Demographic	N	Y	N	N
Clinical	Resident -Profile - Contacts	N	Y	N	N
Clinical	Resident -Profile - Accommodations	N	Y	N	N
Clinical	Resident -Profile - Agencies	N	Y	N	N
Clinical	Resident -Profile - Insurance	N	Y	N	N
Clinical	Resident -Medical - Summary	N	Y	N	N
Clinical	Resident -Medical - Notes	Y	Y	Y	N
Clinical	Resident - Medical - History	N	Y	N	N

Clinical	Resident - Medical - Events	LOA	Y	LOA	N
Clinical	Resident - Medical -Care Team	N	Y	N	N
Clinical	Resident - Medical - Vitals	N	Y	N	N
Clinical	Resident - Medical - Labs	N	Y	N	N
Clinical	Resident - Medical - Input/Output	N	Y	N	N
Clinical	Resident - Medical - Evaluations	N	Y	N	
Clinical	Resident - Services - Service Plan	N	Y	N	
Clinical	Resident - Services - Service Delivery	N	Y	N	
Clinical	Resident - Services - eSign	N	N	N	
Clinical	Resident -Housing - Summary	N	Y	N	N
Clinical	Resident -Housing - Occupancy	N	Y	N	N
Clinical	Resident - Daily Care	Y	Y	Y	
Clinical	Care	Y	Y	Y	
Clinical	Schedule - Shift Status		Y	N	
Clinical	Schedule - Service Delivery		N	N	
Clinical	Schedule - Service Alerts		N	N	
Clinical	Schedule - Not Completed		N	N	
Clinical	Schedule - Active		N	N	
Clinical	Schedule - Past		N	N	
Clinical	Configuration - Service Providers	N	Y	N	
Clinical	Configuration - Care Levels	N	Y	N	N
Clinical	Configuration - Evaluations	N	Y	N	N
Clinical	Configuration - Service Catalog	N	Y	N	
Clinical	Configuration - Forms		Y	N	
Clinical	Prospect		N	N	
Clinical	Reports		Y	Y	

What This Means

- Communities can let caregivers document notes and leave of absence directly in the system without granting broader clinical permissions.
- Organizations can adopt the new role selectively, community by community or user by user, without affecting existing Support Staff configurations.

Clinical Fixes

This release includes a series of fixes across evaluations, scheduling, contacts, reporting, and incident documentation to improve reliability and data accuracy in Clinical.

- Resolved an issue where printing an evaluation with Include Services selected did not print services attached to subquestions; all associated services now print correctly.
- Resolved an issue where the Care Level dropdown in Evaluation Scoring configuration only loaded the first 100 care levels; the dropdown now loads the complete list.

- Improved loading performance across Clinical Notes, Schedule, and Evaluations — including evaluation listings, copy-forward, and printing — reducing wait times.
- Resolved an issue preventing deletion of a resident contact that was missing a first or last name; editing a contact still requires both fields to be entered.
- Resolved an issue where a service discontinued through an evaluation update could still appear on the schedule for one additional day; associated Daily Cares scheduled after the discontinue date and time are now removed correctly.
- Improved loading performance for Clinical dashboards and reports, including the Missed Service Count widget and the Basic Level of Care Report, which previously could time out or take over a minute to load.
- Resolved an issue preventing users from re-signing an Incident Report after unlocking it to make edits.
- Added View in Chart, Save, and Cancel buttons to the Service Review modal (Clinical → Schedule → Past → Review), so users can save changes, view the resident's Service Plan, or close the modal without being required to mark the task as reviewed.

Clinical & EMAR: Seamless Sign-In Between Apps

- Previously, spending extended time in one application before switching to the other could unexpectedly log users out, requiring them to sign back in. Clinical and EMAR now share session information behind the scenes, so moving between the two applications no longer triggers unnecessary login prompts.

CRM

No Default Date on Reservations and Conversions

The Reservation Start Date and Move-In Date fields no longer default to today's date, since reservations are typically made for a future move-in.

Navigation: CRM → Add Reservation Unit modal

What's New

- Reservation Start Date (Reserve Unit) and Move-In Date (Convert to Resident) now load empty instead of pre-filling with today's date.
- Clicking into either date field still opens the calendar starting on today's date, making it easy to navigate to the correct date.
- Both fields remain required — attempting to save without a date still blocks the save and shows a validation error.
- Existing reservations are unaffected; this change only applies to new reservations and conversions going forward.

What This Means

- Users are less likely to accidentally save a reservation or conversion with today's date instead of the intended future date.

- Reduces extra clicks to correct a prefilled date and helps keep reservation and move-in reporting accurate.

Terminology Update: "Lead" is now "Prelead"

What's Changing

Throughout Eldermark NEXT, every place you previously saw the term **Lead** — screens, fields, reports, filters, and labels — will now read **Prelead**. This is a terminology update only. The record itself, what it represents, and how it behaves in your pipeline are not changing.

Why We're Making This Change

We're renaming this term to align with standard industry terminology. "Prelead" is the more widely recognized name for this stage of a prospect record across senior living sales and CRM systems, and adopting it makes Eldermark NEXT easier to understand for new team members and more consistent with the language used across the industry.

What Is a Prelead?

A Prelead is a record created when we obtain someone's contact information — for example, through a purchased list, web form, marketing campaign, or referral — before your team has made direct contact with that person or confirmed them as a qualified prospect.

Once your team connects with that person and qualifies them — for example, through a phone call, tour, or in-person visit — they move forward in your pipeline as an active, qualified prospect. In short: anywhere your team previously thought of or referred to a "Lead" — a contact you have information on but haven't yet connected with or qualified — you should now think of and refer to it as a "Prelead."

What This Means for Your Team

- No workflow, process, or configuration changes are required on your end.
- No data is moving, merging, or being restructured — existing records are unaffected.
- The only visible change is the label "Prelead" appearing where "Lead" appeared before, including in the navigation, record details, filters, and reports.

Sales Status Categories

What's Changing

Sales Status configuration now includes a new required field called **Category**. Every Sales Status in your system — the custom labels your team already uses, such as *Interested*, *Touring*, *Ready Soon*, or *Not Ready Yet* — will need to be mapped to one standardized Category from a fixed list of 15 values. You keep full control over your own Sales Status names; only the underlying reporting Category is standardized.

Why This Matters

Every client configures Sales Statuses differently, which is by design — your team should be able to use language that fits how you sell. But that same flexibility has made it difficult to build reporting, dashboards, and automation that work consistently across clients, because the system has no way of knowing that one client's "Interested" means the same thing as another client's "Warm."

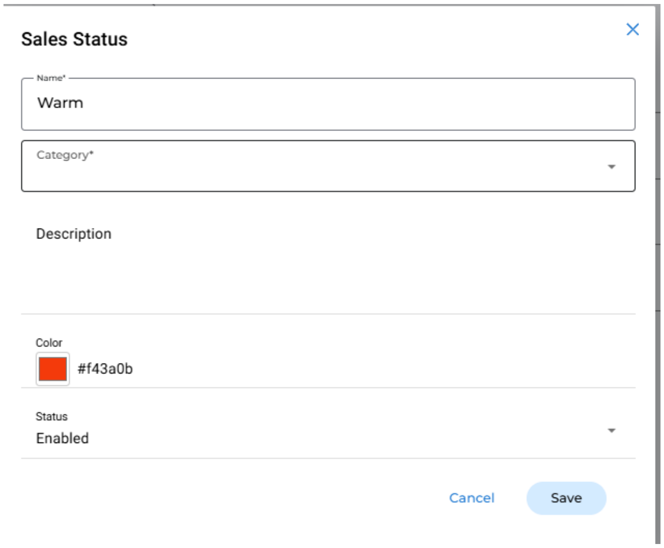
The Category field solves this. It sits behind your custom Sales Status values and tells the system how each one should be treated for reporting and, in the future, for workflow automation. In practice, this means:

- Your dashboards and rollup reports will be more accurate and easier to compare over time.
- Reports and dashboards can filter and group by Category as well as by your specific Sales Status names.
- Future workflow automation will be able to trigger off a Category (for example, "all statuses categorized as Hot") instead of needing to be rebuilt every time a Sales Status name changes.

Action Required
Please review your Sales Status list after this update goes live.

Category is a required field for every Sales Status going forward, but it will not be filled in automatically for statuses you've already created. Your team will need to open each existing Sales Status and manually assign a Category. New Sales Statuses cannot be saved without one.

Where to Find It
Navigate to **CRM** → **Configuration** → **Sales Statuses**. The list view now shows a Category column alongside Name, Color, Description, and Status. Opening a Sales Status for add or edit will show the new Category dropdown, which must be completed before saving.



The 15 Standard Categories
These categories represent the full prospect and resident journey, from first marketing touch through move-in and beyond. Use the definitions below as a guide when assigning a Category to each of your Sales Status values.

Not Yet in Use: Lost & Unqualified
Two categories on this list — Lost and Unqualified — should not be assigned to any Sales Status at this time.

Today, marking a prospect as Lost or Unqualified in CRM NEXT is handled through a separate, existing manual process that captures a specific Lost Reason. Assigning one of these Categories to a Sales Status right now would create confusion between that existing process and this new field.

We're planning a future enhancement to connect Lost Reason tracking with Sales Status Category, and we'll share more details as that work is scheduled. Until then, please continue using your current Lost process and leave Lost and Unqualified unassigned.

Category	Definition
Marketing	A contact captured through a marketing or outreach effort (web form, event, ad response, etc.) who has not yet had an active sales conversation.
Future	A qualified prospect whose need or move-in timeframe is long-term rather than immediate; being nurtured until timing gets closer.
Cold	A prospect who has gone unresponsive or disengaged; recent outreach has not produced a response.
Warm	A prospect who is actively engaged and responsive, but has not yet indicated urgency or a firm timeframe.
Hot	A highly engaged prospect who is actively evaluating options and likely to make a decision soon.

Now	A prospect with an immediate, time-sensitive need who is ready to move forward right away.
Waitlist	A prospect who has chosen your community or service and is waiting for the right unit, space, or opening to become available.
Depositor	A prospect who has placed a deposit to secure their place but has not yet completed a full reservation.
Reservation	A prospect with a confirmed reservation for a specific unit or service who is preparing to move in or start.
Member	An individual who has completed enrollment and is an active member of a membership-based program or community.
Resident	An individual who has moved in and is a current, active resident.
Former Resident	An individual who was previously an active resident but has since moved out, transferred, or been discharged.
Lost *	An opportunity that did not convert — the prospect chose another provider or is otherwise no longer viable.
Unqualified *	A contact who does not meet the criteria, needs, or eligibility requirements for your community or service.
Deceased	An individual who has passed away.

** Not in use yet — see "Not Yet in Use: Lost & Unqualified" above.*

Reporting, Filtering & What Stays the Same
Category will be available anywhere Sales Status is used today, including Search Filters, AG Grid filters, Dashboards, Reports, and API responses. Changes to a Sales Status's Category apply immediately to reporting, filtering, and workflow logic going forward. Inactive Sales Statuses remain on historical records and keep their assigned Category for reporting, but cannot be selected for new records.

CRM and Marketing Automation fixes

This release includes a fix to restore reliable data sync between CRM and connected marketing automation tools.

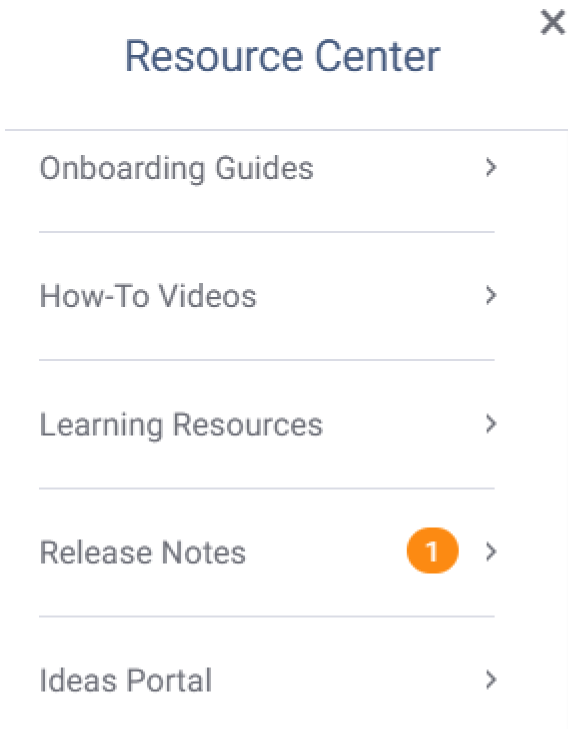
- Resolved an issue preventing the ActiveDemand marketing automation integration from syncing prospect and contact information for community-specific requests, which had interrupted integration activity for affected accounts.

New: Ideas Portal

Product Requests has moved to a new Ideas Portal, giving users one place to submit, browse, and vote on product ideas from within Eldermark Spark.

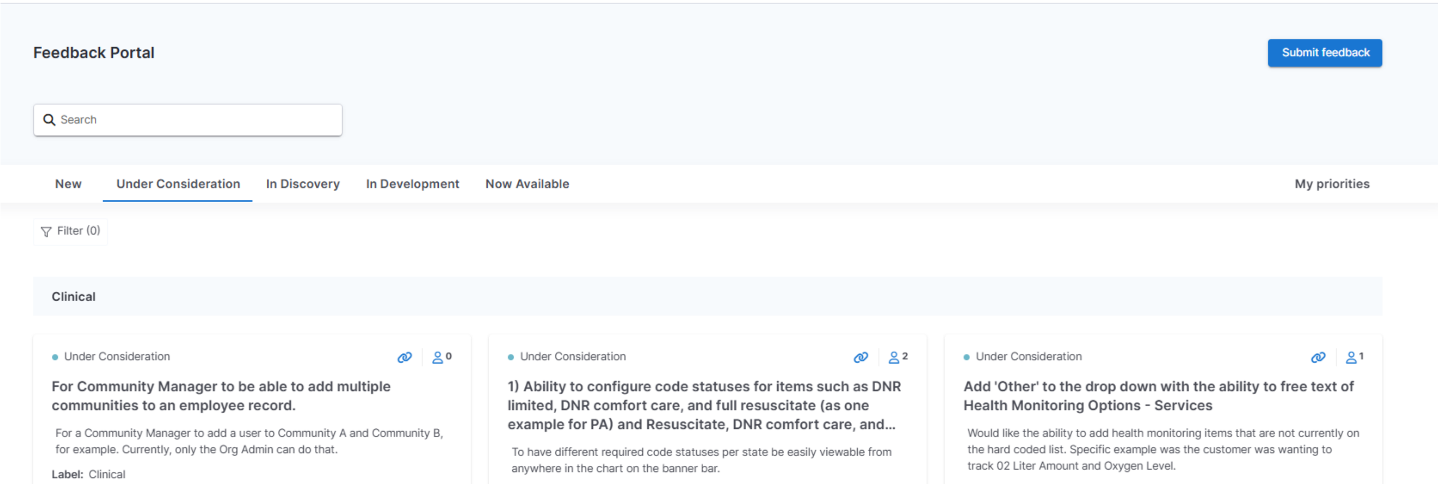
Navigation: Eldermark Spark → Resource Center → Ideas Portal

NEXT Release Notes



What's New

- Product Requests has moved to the new Ideas Portal, accessible from the Resource Center within Eldermark Spark.
- Users can submit new product requests directly through the Ideas Portal.
- Users can browse ideas submitted by other users to see what's already been requested.
- Users can upvote existing ideas to show support for requests that matter to them.



What This Means

- All product requests now live in one place, making it easier to submit and keep track of feedback.
- Seeing what others have already requested helps avoid duplicate submissions and surfaces common needs.

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- Upvoting gives users a direct way to signal which ideas matter most to them, helping inform future roadmap decisions.

Behind the Scenes

This release also includes ongoing technical maintenance work to strengthen platform stability, performance, and long-term reliability.

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