



Release Notes 2026.8 Clinical and 2026.5 EMAR

This release delivers enhancements across Clinical, Risk Management, EMAR, Integrations, and overall usability, with a focus on making everyday workflows faster, clearer, and more reliable.

Clinical teams gain improved scheduling tools, expanded resident information, longer Service Plan instructions, and broader Activity Tracking. EMAR introduces a new pharmacy integration, clearer medication order dates, and documentation improvements. This release also expands integration capabilities through Carefeed and the Integrator API, while several platform-wide usability updates make lists, user management, and community navigation easier to work with.

Highlights

Clinical Workflow Enhancements – State-specific Public Health insurance fields, improved resident contact information, an optional Age column, faster Schedule date navigation, 15-day Daily Care visibility, and longer Service Plan instructions give teams more flexibility and information at the point of care.

Expanded Activity Tracking – Additional auditing across user accounts, permissions, community Lists, CRM records, and configuration changes provides administrators with greater visibility into who made changes, what changed, and when.

Risk Management Notifications – Sentinel Event notifications now evaluate the current incident status each time an Initial Report is completed, helping ensure appropriate stakeholders are notified when an event is designated as sentinel.

New Advanced RX Pharmacy Integration – Communities integrated with a pharmacy that uses the Advanced RX pharmacy system can now receive medication orders and profile updates directly in EMAR, reducing manual entry and supporting more efficient medication workflows.

EMAR Medication Order Enhancements – New Order Start and Schedule Start fields clearly distinguish when an order originated from when medication administration begins. Additional updates include longer Indication entries and clearer completion buttons for non-medication MAR/TAR orders.

New Carefeed Integration – Eldermark NEXT can now securely synchronize resident and family-contact information with Carefeed, reducing duplicate data entry and helping keep family communication information current. The integration is currently available as a limited pilot.



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Integrator API Expansion – New capabilities allow partners to update resident information, access pre-admit and discharged resident populations, retrieve user and Service Catalog information, and manually retry failed webhook deliveries.

Design & Usability Improvements – Updated list screens provide better loading feedback, expanded filtering, export options, pagination, and more usable screen space. Password requirements now validate as administrators type, and the Community selector adds alphabetical sorting and search for faster navigation.

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Clinical

Public Health Insurance: State-Specific Fields

Public Health insurance fields now adapt to the resident's community state, so users only see the fields and terminology that apply where they operate.

Navigation: Clinical → Resident Profile → Insurance → Public Health card | Add/Edit Public Health Insurance modal

What's New

- **Medicaid Control Number (Florida only):** The Medicaid Control Number field now displays only for residents in Florida communities. It remains required when a Medicaid # has been entered; if no Medicaid # is entered, no validation occurs.

The screenshot shows a modal titled "Insurance". Inside, there is a dropdown menu for "Coverage" with "Public Health" selected. Below this are two input fields: "Medicaid #" containing the value "124561" and "Medicare #". At the bottom is a larger input field for "Medicaid Control Number". At the bottom right of the modal are "Cancel" and "Save" buttons.

- Communities outside Florida no longer see the Medicaid Control Number field at all. They can create and edit Public Health insurance records without hitting validation on a field that doesn't apply to them.
- Community state is evaluated when the Public Health Insurance modal is opened, so the correct fields display based on where the resident's community is located.
- **RIN # label (Illinois only):** For Illinois communities, the resident's Medicaid Number now displays with the label **RIN #** — the Recipient Identification Number used for Illinois Medicaid billing — on the Insurance card and in the add/edit Public Health Insurance modal.



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Insurance

Coverage

Public Health

RIN #

Medicare #

Cancel

Save

- The RIN # label appears on the Insurance card whether or not a value has been entered; when empty, the card continues to display "---" under the updated label. In the modal, RIN # appears as both the field placeholder and the inline label once a value is entered.
- This is a display change only. There are no stored data changes; communities outside Illinois continue to see the Medicaid # label, and existing permissions are unchanged.

What This Means

- Clinical users only see insurance fields relevant to their state, reducing confusion over fields that carry no meaning outside of Florida.
- Non-Florida communities can save Public Health insurance records without being blocked by a Florida-specific requirement.
- Illinois communities see the identifier named the way their state names it, aligning the resident record with Illinois Medicaid billing terminology.

Resident Contacts: All Phone Numbers on the Contact Card

Resident Contact cards now display every phone number on the contact record, along with each number's type and a Preferred badge, so staff can see all available ways to reach a contact without opening the record.

Navigation: Resident record → Profile → Contacts

Contacts

New

1. Myriah Kern Emergency

Daughter, Conservator of Estate (CE), Responsible Party / Bill to (RP)

Mobile: (701) 896-6532 Preferred

Work: (701) 425-9636

Home: (701) 842-6396

2. Sarah Bement

Next Door Neighbor, Responsible Party / Bill to (RP)

Work: (986) 896-9865 Preferred

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What's New

- Contact cards now display all phone numbers associated with a contact, rather than only the number marked Preferred.
- Each phone number displays its phone type — Mobile, Home, Work — so users can tell at a glance which number they're calling.
- The number designated as Preferred displays a **Preferred** badge next to it. A contact can have only one preferred number, so only one badge appears per card.
- If no number is marked Preferred, no badge displays and all numbers still appear.
- Phone numbers display in the same order as they appear on the contact record, with no cap on how many are shown.
- If a contact has no phone numbers, no phone section displays on the card.
- Existing contact details — name, relationship, contact roles, and the Emergency badge — continue to display as they do today.

What This Means

- Staff can see every way to reach a contact directly from the Contacts listing, without clicking into each record.
- Previously, a contact whose number wasn't flagged Preferred appeared to have no phone number at all on the listing; all numbers now display regardless of preferred status.
- Phone Type and the Preferred badge make it clear which number to try first, supporting faster outreach during time-sensitive situations.

Resident Listing: Optional Age Column

The Residents listing now offers an optional Age column, so clinical users can see resident ages directly from the grid without opening each record.

Navigation: Clinical → Residents → Column Settings

Residents 38

New

Active Yes

☐	Picture	Name	Unit	Unit Station	Birthdate	Age	Admit Date	Discharge Date
☐		Anderson, Donna	01	Red	7/24/1933	93	02/01/2024	
☐		Bennette, Bonita	25	Red	1/3/1956	70	06/14/2024	
☐		Bergstrom, Emmer...	14 - B	Green	8/8/1936	90	02/26/2026	

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☐	Picture	Na...	Unit	Unit Sta...	Birthdate	Age	Admit ...	Dischar...	Search...	Columns	Filters
☐		Anderson, D...	01	Red	7/24/1933	93	02/01/2024		☒	☒	☒
☐		Bennette, Bo...	25	Red	1/3/1956	70	06/14/2024		☒	☒	☒
☐		Bergstrom, E...	14 - B	Green	8/8/1936	90	02/26/2026		☒	☒	☒
☐		Blackhart, Hu...	19	Pink	8/19/1988	38	05/08/2025		☒	☒	☒

What's New

- Age is now available in the Columns selector on the Residents listing.
- The column is optional and hidden by default; the listing's default layout is unchanged.
- Age uses the same calculated value shown in the resident profile header, and updates automatically based on the resident's Birthdate.
- Residents with no Birthdate on file display a blank Age value.
- The Age column supports sorting, filtering, show/hide, and reordering just like other columns on the listing.
- Existing Residents grid behavior and saved column preferences are unaffected.

What This Means

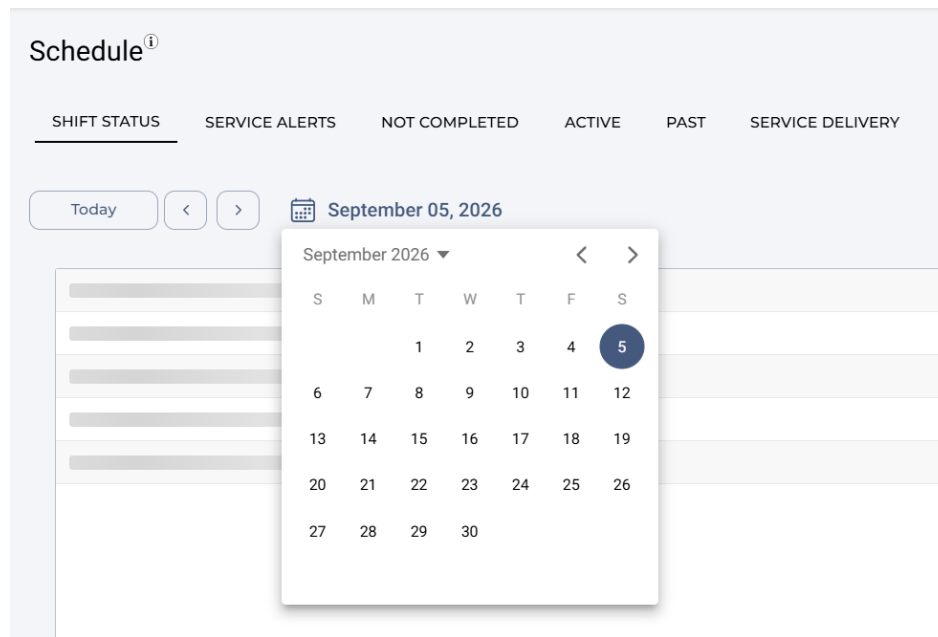
- Clinical users can scan resident ages across the census at a glance instead of opening records one at a time.
- Sorting and filtering by Age supports quick identification of age-based cohorts for care planning and reporting.
- Users who don't need the column will see no change — it stays hidden unless they add it.

Schedule: Date Picker for Faster Date Navigation

The Schedule screen now includes a date picker, so users can jump directly to any date instead of clicking forward or backward one day at a time.



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Navigation: Clinical → Schedule → Shift Status | Not Completed | Active | Past

What's New

- Clicking the displayed date on the Shift Status, Not Completed, Active, and Past tabs now opens a calendar date picker.
- Selecting a date refreshes the tab to show schedule data for that date.
- Any valid date can be selected, whether historical or future.
- The date picker matches the standard calendar used elsewhere in Eldermark NEXT, so selection behaves the same way it does on other screens.
- Existing Previous and Next date controls remain available — users can navigate either way.
- The selected date is retained when switching between Schedule tabs, until it's changed, or the page is refreshed.

What This Means

- Reviewing services performed several weeks or months back takes one click instead of repeated day-by-day toggling.
- Validating future scheduled services is faster, particularly when planning ahead across multiple tabs.
- Because the selected date carries across tabs, users can review the same day's Shift Status, Not Completed, Active, and Past data without re-selecting it each time.



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Schedule: 15-Day Daily Care Visibility

Daily Care services are now scheduled and viewable up to 15 days into the future, replacing a backend restriction that limited Clinical Schedule and Service Delivery to 7 days regardless of how far ahead services had actually been scheduled.

Navigation: Clinical → Schedule | Resident record → Services → Service Delivery

What's New

- Daily Care services are now scheduled 15 days into the future on a permanent basis.
- Clinical → Schedule now returns scheduled services through 15 days out, rather than stopping at 7 days.
- Resident → Services → Service Delivery supports viewing scheduled services across the same 15-day range, with existing date filters working throughout.
- Users can now see all scheduled Daily Care records that exist, instead of only the first week of them.
- Services display correctly across community time zones, with no partial or missing days at the 15-day boundary.

What This Means

- Staff can plan and review resident care two weeks out instead of one, supporting scheduling, coverage planning, and reporting that previously required waiting for days to come into view.
- The 7-day limit was a historical safeguard from when services were only scheduled a week ahead; removing it means the Schedule now reflects what's actually scheduled.
- The extended window was validated for performance before being made permanent, so the additional visibility doesn't come at the cost of slower schedule loading.

Clinical Fixes

This release includes fixes to improve accuracy and reliability in Clinical scheduling and printed documentation. This release also includes fixes across evaluations, reporting, medical history, care team, and resident listings to improve reliability and data accuracy in Clinical.

- Resolved an issue where printing a daily service schedule for an individual staff member displayed the previous day's date instead of the selected date; printed schedules now match the date shown on screen.
- Resolved an issue where printing a daily service schedule for an individual staff member displayed the previous day's date instead of the selected date; printed schedules now match the date shown on screen.



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- Resolved an issue where a Follow-up Question was hidden whenever an answer option had both Additional Detail and a Follow-up Question configured; both the Additional Detail field and the Follow-up Question now display when the option is selected, including on evaluations copied forward.
- Resolved an issue where the Diet Report did not appear under Clinical → Reports for the Clinical Provider role; report visibility now follows the documented access role permissions.
- Resolved an issue preventing diagnosis codes from being added to a resident's medical history when an existing diagnosis shared the same name — for example, R41.89 could not be added alongside R41. Diagnosis uniqueness is now based on code and name together, so codes sharing a name can both be saved.
- Improved loading performance for the Add Care Team Member modal, which previously took several seconds and left the page unresponsive in communities with large medical professional lists.
- Resolved two issues on the Clinical Resident listing grid: the Sex column returned no value even when the resident chart had Sex populated, and the Gender Identity column displayed a raw backend value instead of the formatted display value.

Risk Management

Sentinel Event Notifications on Initial Report Completion

Sentinel Event notifications are now sent each time an Initial Report is completed for an incident marked as a Sentinel Event, so required stakeholders are notified consistently rather than only on the first completion.

Navigation: Risk Management → Incident Form → Initial Report → Completed By → Sign Here

What's New

- When a user signs the Initial Report next to Completed By, the system checks the current answer to **Is this a Sentinel Event?**
- If the answer is Yes, the existing Sentinel Event notification is sent. If No, no notification is sent.
- The notification is sent each time the Initial Report is completed while the incident is marked as a Sentinel Event — previous completions are not considered.
- Existing notification recipients, content, and delivery methods are unchanged.

What This Means



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- An incident that becomes a Sentinel Event after the Initial Report was first completed now generates a notification when the report is completed again, closing a gap where stakeholders could miss the designation.
- Because the check happens at the moment of signing, the notification reflects the incident's current Sentinel Event status rather than its status when the report was first created.

EMAR

New Pharmacy Integration: Advanced RX

Advanced RX is now available as an integrated pharmacy partner in Eldermark NEXT, sending medication orders into EMAR.

What's New

- Communities integrated with a pharmacy that uses the Advanced RX pharmacy system can now receive medication orders and profile updates directly in Eldermark NEXT, without manual entry.
- Advanced RX joins Eldermark NEXT's existing integrated pharmacy partners and follows the same order intake workflow.

To get connected: Contact your Customer Success Manager or Eldermark Support to enable the Advanced RX connection for your community.

What This Means

- Medication orders arrive in EMAR without staff re-entering them, reducing transcription work and the errors that come with it.
- Communities already working with Advanced RX can consolidate onto their existing pharmacy relationship rather than switching providers to gain integration.

Medication Orders: Order Start Date and Schedule Start Date

Medication orders now distinguish between two dates that were previously combined into a single "Start Date": **Order Start**, the date the prescription was ordered, and **Schedule Start**, the date the first scheduled administration occurs. Both display throughout EMAR so staff can tell when an order originated versus when passes began.

Navigation: MAR → Hotlist, Pass, Available PRNs | Orders → Receive Orders, Medication Profile | Add to MAR/TAR | MAR/TAR Notes | Alternative Administration | Reports

What's New

- **Order Start** is a new field representing the order start date. It records when the order was ordered and does not mean schedules have been created.



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Manage | Drug Code (NDC): 36800005452 | 12 Hour Decongestant | Instructions: | MAR | Janson | Active
RX: ATM106 | Pseudoephedrine HCl ER | Community Instructions: | 08:00 AM - 0
FON: ATM106 | (120 MG) | Indication:
Admin History | Order Start: 05/13/2026 12:00 AM | Drug Information
Source Pharmacy: Hometown Pharmacy #

- **Schedule Start** is the first scheduled administration date, controlled by the order's schedule settings. The label "Start Date" has been renamed to Schedule Start Date where it refers to this date.

12 Hour Decongestant ⓘ
0 (120 MG)
MAR
Schedule Start Date: 05/14/2026
08:00 AM
08:00 AM - 0
Last Updated: May 13 2026 at 01:23 PM by siera@jasper
View History
Edit

- Order Start can be edited from Manage Orders, so staff can correct the prescription date when needed.
- When a new pharmacy message is received, the start date it contains is saved to both Order Start and Schedule Start. If the first administration is later adjusted — by a user or automatically by EMAR — only Schedule Start changes, leaving the original prescription date intact.

Instructions
Community Instructions
Indication
Route --Select-- Form --Select-- Alt. Administration --Select--
Source Pharmacy Hometown Pharmacy - Physician Janson
Order Date May 13, 2026

- Both dates now appear where each is relevant: the Medication Profile shows Order Start and Schedule Start, Manage Order shows both, MAR Pass shows Order Start, and the MAR Report shows Order Start alongside Schedule Start Date.
- Order Start has been added to Manage Order History, so changes to the prescription date are traceable.
- Date labels have been updated across the MAR Hotlist, Follow-Up and Overdue views, PRN protocols, Available PRNs, Receive Orders, Bio Tests, Body Map, Admin Notes, Drug Information, Alternative Administration, and the Physician Order Sheet, MAR Report, Medication List, and PRN Orders reports.
- On the Add to MAR/TAR, Add to MAR/TAR Batch, and MAR/TAR Notes screens, custom cycle fields are now labeled Schedule Start Date and Schedule Start Date and Time.



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What This Means

- Staff can tell at a glance whether a date reflects when a physician wrote the order or when administration actually began — a distinction that previously required checking order history or contacting the pharmacy.
- Adjusting a first administration time no longer overwrites the prescription date, so the clinical record preserves when the order was originally started.
- Because Order Start appears on the MAR Report and Physician Order Sheet, order origination dates are available for audits and physician review without cross-referencing screens.

Order Start on Existing Orders

Orders that existed before Order Start was introduced have been backfilled using the order's effective date and time — the first schedule date and time.

- For pre-existing orders, Order Start reflects the first schedule start date and time rather than the date the order was started, so Order Start and Schedule Start will generally match on historical orders.
- Orders received from the pharmacy after this release populate Order Start from the start date in the pharmacy message, so the two dates can differ going forward.
- Orders that already had an Order Start value were not changed.

Indication Field: Longer Entries

The Indication field now accepts up to 250 characters, so staff can document complete indications without abbreviating.

Navigation: Anywhere the Indication field is available for entry or editing

What's New

- The Indication character limit has been increased to 250 characters.
- The increased limit applies everywhere the Indication field can be entered or edited.
- Existing indications continue to display and function without modification.

What This Means

- Staff can record a full, descriptive indication rather than shortening it to fit, keeping the reason for a medication clear to anyone reviewing the order.
- Longer indications reduce the need to abbreviate clinical terms, which can be misread by other staff.



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MAR/TAR Pass: Clearer Button Labels for Non-Medication Orders

Completion buttons on Non-Medication MAR and TAR orders now read **Sign as Completed** and **Sign as Not Completed**, making it clear that selecting them applies the user's signature.

Navigation: EMAR → MAR → Pass → Resident | EMAR → TAR → Pass → Resident

The screenshot displays a user interface for a MAR/TAR Pass. On the left, under the heading 'ORDER:', the text 'Put Ted Stockings on every morning' is shown. Below this are two buttons: 'Admin History' and 'Manage Order'. To the right of these buttons, it says 'Last Given: 06/01/2026 02:25 PM'. Further right, it indicates 'Due at 08:00 AM'. At the bottom left, there is a note: 'Rx: ATM71 started from 10/31/2025 12:00 AM (no end date scheduled)' and 'Source Pharmacy: Hometown Pharmacy #'. On the right side of the interface, there are two large buttons: a green one labeled 'Sign as Completed' with 'Due at 08:00 AM' below it, and a red one labeled 'Sign as Not Completed' with 'Due at 08:00 AM' below it. Above these buttons are three circular icons: a clipboard, a heart, and a person.

What's New

- On Non-Medication MAR and Non-Medication TAR orders displayed on the pass, the **Completed** button is now labeled **Sign as Completed**, and **Not Completed** is now labeled **Sign as Not Completed**.
- Spacing between the status label and the Due At label is now consistent across both buttons; the Not Completed button previously displayed with incorrect spacing.
- Medication order buttons are unchanged.

What This Means

- Med providers can see that the action applies a signature rather than simply marking a task, matching the language used elsewhere on the pass.
- Consistent labeling reduces hesitation during documentation, particularly for staff who move between medication and non-medication orders in the same pass.

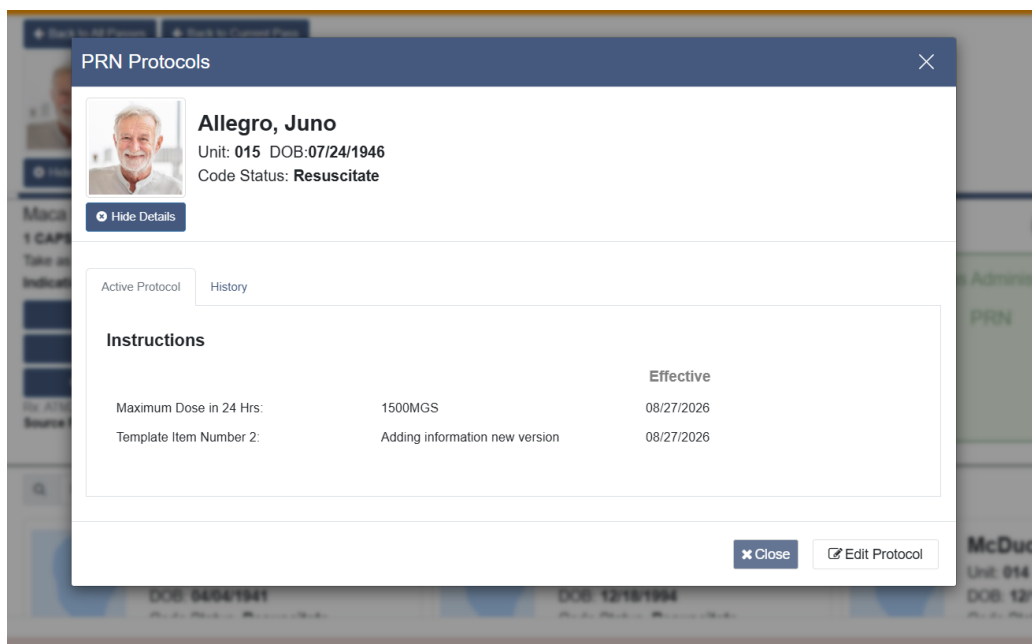
PRN Protocol View: MAR Pass Display Update

PRN Protocol details on the MAR Pass now open in a modal window rather than expanding inline within the med row.

Navigation: EMAR > MAR/TAR > Pass > Resident



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What's New

- When a PRN order has an active PRN Protocol, a **PRN Protocol** button appears on the med row.
- Clicking the button opens PRN Protocol details in a modal window.
- PRN Protocol details no longer expand inline within the med row.

What This Means

- Protocol details open in a dedicated window, keeping the med row uncluttered while passing medications.
- Staff can still review full Protocol details and return to the pass without losing their place in the med list.

EMAR Fixes

This release includes fixes across medication orders, reports, scheduling, and facility settings to improve accuracy and reliability in EMAR.

- Resolved an issue where the Second Signature window did not appear when adding an order to the MAR that required a double signature — either through the Enable Double Signature Add to MAR option or a Controlled Drug Schedule requirement — which allowed orders to be created without the required second signature. The Second Signature window now appears once per qualifying order, and the order cannot be created until valid second-signature credentials are entered.
- Resolved an issue where the Physician Order Sheet and Medication List reports printed only a subset of a resident's active medication orders; all active orders now appear.



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- Resolved an issue where Community Instructions on the Physician Order Sheet printed unlabeled and on the same line as Instructions; they are now clearly labeled and formatted consistently with the Medication List.
- Resolved an issue preventing Organization Administrator and Brand Implementation Specialist roles from saving changes on the Time Format page — the Facility Time Zone dropdown would not open and Save had no effect. Both roles can now update time zone and 12/24-hour format settings.
- Resolved an issue where medication strength stopped displaying on the MAR pass and Manage Order info section after an order's form was edited.
- Resolved an issue where adding a new schedule to an existing order caused the order's indication to stop displaying on the Medication Profile and med pass, even though the indication was still saved on the record.
- Resolved an issue where New Order badges on the Medication Profile ignored the configured display duration — badges continued to display when the setting was set to 0, and reducing the hours did not clear badges already showing.
- Resolved an issue where non-medication MAR/TAR orders and MAR/TAR Notes did not follow the Start new orders from current date/time setting; when the scheduled time has already passed, the first occurrence is now scheduled for the following day, consistent with medication orders.
- Resolved an issue where editing a PRN administration date required selecting the date twice — the first calendar selection now applies.

Design and Usability Updates

List Screens: Faster Loading, Taller Views, and New List Tools

List screens across Clinical Configuration, Lists, and Clinical Operations now show a placeholder while information loads, fill the height of the browser window, and gain export, expanded filtering, and pagination — bringing them in line with the list experience elsewhere in Eldermark NEXT.

Navigation: Clinical → Configuration → Service Catalog / Service Provider / Care Levels / Forms | Lists → Units / Medical Professionals / Medical History / Agencies / Insurance Providers / Medical Information / Census / Community Fields | Clinical → Schedule → Active, Not Completed, Past, Service Alerts | Resident record → Services → Service Delivery | Resident record → Medical → Events | Clinical → Prospect → Prospect Listing | Customer Service → Settings → Integrated Pharmacies

What's New



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- **Export** is now available on these lists, so information can be pulled out for reporting or review without retyping it.
- **Expanded filtering** gives users more ways to narrow a list to the records they need.
- **Pagination** now controls how records are displayed. This replaces infinite scrolling, which caused problems on the larger screens in this group.
- While a list is loading, a placeholder appears in the shape of the list's columns, instead of a blank or frozen screen.
- The placeholder appears when a page first opens, when it refreshes, when a filter is applied, and when switching between communities. It clears on its own once loading finishes, whether the request succeeds or returns an error.
- Every updated screen uses the same loading placeholder, so the experience looks the same regardless of which list a user opens.
- Lists now extend to the bottom of the browser window instead of stopping after a set number of rows, so more records fit on screen.
- Sorting, adding and editing records, permissions, empty states, and error messages are unchanged.

What This Means

- Staff can export these lists directly rather than requesting the information or rebuilding it by hand.
- Expanded filtering makes long lists — service catalogs, medical professionals, prospect listings — faster to work through.
- Replacing infinite scrolling with pagination makes the larger screens more reliable, since records now load in predictable pages rather than continuously as the user scrolls.
- Staff see right away that a list is loading, rather than looking at an empty screen and wondering whether their click registered.
- Because every list loads and behaves the same way, moving between configuration, list, and scheduling screens feels consistent.

User Management: Password Requirements Shown as You Type

Temporary Password fields now list the password requirements and check them off in real time as you type, so administrators know a password is valid before submitting instead of discovering it through a generic error afterward.

Navigation: Brand / Organization / Community → Users → Add User | Users → User Record → Reset Password | Users → User Record → Unlock Account

What's New

- Password requirements now display beneath the Temporary Password field, each on its own line: at least 8 characters, one uppercase letter, one lowercase letter, one number, and one special character.



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- Each requirement is validated independently and updates immediately as the password is typed, showing a success indicator once met and staying in the default state until then.

- ✓ At least 8 characters
- ✓ 1 uppercase letter
- ✓ 1 lowercase letter
- ✓ 1 number
- ✓ 1 special character

- All special characters are accepted, not only the examples shown in the requirement text.
- Add User:** Save stays disabled until First Name, Last Name, Username, a valid Temporary Password, and at least one of Email or Phone have been entered. If any required field is cleared or becomes invalid, Save disables again.

User

First Name Bennett	Last Name Morth
Credentials	Multi-factor Authentication via ... Disabled
Title	
Email mkern@eldermark.com	
Phone	
Username bkern@uat	Temporary Password Password

- ✓ At least 8 characters
- ✓ 1 uppercase letter
- ✓ 1 lowercase letter
- 1 number
- 1 special character

[Cancel](#) [Save](#)

- Reset Password:** Reset enables only when every requirement is met, and disables again if the password becomes invalid.
- Unlock Account:** Unlock enables only when every requirement is met, and disables again if the password becomes invalid.

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Unlock Account

Set a temporary password to unlock the user's account

Temporary Password

- ☐ At least 8 characters
- ☐ 1 uppercase letter
- ☐ 1 lowercase letter
- ☐ 1 number
- ☐ 1 special character

[Cancel](#) [Unlock](#)

- Requirements display only where a Temporary Password is being set — they don't appear when editing an existing user profile, which has no password field.
- Underlying user creation, password reset, and account unlock functionality is unchanged.

What This Means

- Administrators can see exactly which requirement a password is missing while typing, rather than hitting a generic "Unexpected Error — Contact Technical Support" message on save.
- Disabled Save, Reset, and Unlock buttons prevent submitting a password that was never going to be accepted, cutting failed attempts and support calls.
- The same validation pattern applies across Add User, Reset Password, and Unlock Account, so the experience is consistent wherever a temporary password is set.

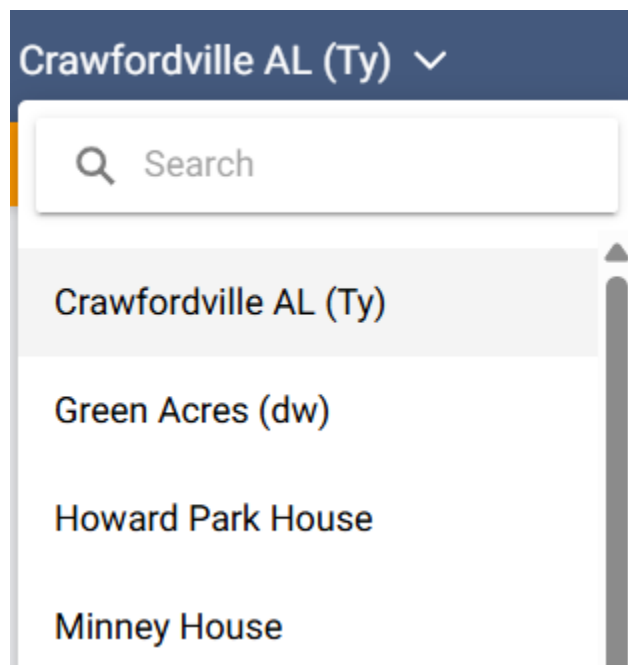
Community Selector: Alphabetical Sorting and Search

The community selector now sorts alphabetically for every role and includes a search field, so users with access to many communities can find the right one quickly instead of scanning a list ordered by go-live date.

Navigation: Top navigation → Community selector



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What's New

- The community list now displays in ascending alphabetical order (A–Z) by community name for all roles, sorted case-insensitively.
- Community Managers previously saw communities in creation and go-live order, with newer communities at the bottom; they now see the same alphabetical list as Organization Administrators and Brand Administrators.
- A search field has been added to the selector, filtering by community name with case-insensitive partial matching. Clearing the search restores the full alphabetical list.
- Large community lists load progressively rather than all at once, and search returns matches across the full list — not only the communities currently loaded.
- Results stay alphabetically ordered throughout, including across paged results.
- Community switching behavior, permissions, and visibility rules are unchanged — users continue to see only the communities they're authorized to access.

What This Means

- Community Managers at multi-community organizations get a consistent, predictable list instead of one ordered by when each community went live.
- Users overseeing many communities can type a few characters to jump to the one they need rather than scrolling.
- Progressive loading keeps the selector responsive for organizations with large community counts.



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Activity Tracking Update

Activity Tracking now captures changes to user accounts, community Lists configuration, and CRM records, giving administrators a complete audit trail of who changed a setting, what changed, and when — with previous and new values recorded for every update.

Navigation: Settings → Users | Settings → Lists → Community Fields, Demographics, Insurance Providers, Agencies, Census, Medical Information | Admin → Activity Tracking → Activity | Community → Activity Tracking

What's New

Creating, updating, and deleting records in the following areas is now logged as Create, Update, and Delete activity, with previous and new values captured for Change Tracking:

- **Users:** account creation and profile changes (first name, last name, email, phone, title, username), security settings including MFA enabled/disabled and MFA method, app and module access changes across CRM, ElderSmarts, Clinical, EMAR, Billing, Risk Management, and ElderForms, Active status changes, user deletion, and restoring a deleted user.
- **Password resets** are logged as a security event — capturing the target user, the administrator who initiated it, and the timestamp — even though no fields change on screen. Password values are never logged.
- **Permission changes saved together** are recorded as a single activity group with an individual entry for each app whose access changed.
- **Community Fields:** Fields and Groups — name, group assignment, and status.
- **Demographics:** Occupations and Previous Living — name and status.
- **Insurance Providers:** Health and Dental — name, status, phone, fax, and full address.
- **Agencies:** Hospitals, Ambulances, Transportation, Funeral Homes, and Pharmacies — name, status, phone, and address, plus pharmacy-specific fields including hours, delivery availability, and NPI.
- **Census:** LOA Reasons including Category, LOA Outcomes, Discharge Reasons including the Mortality Related flag, and Discharged To — name, status, and tab-specific fields.
- **Medical Information:** Note types and Intervention types — name and status.
- **CRM Preleads and Prospects:** creating, updating, and deleting a Prelead or Prospect record, along with linking, and conversion from Prelead to Prospect.
- **CRM Influencers:** creating, updating, deleting, and linking an Influencer record.



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- **CRM contact phone numbers:** adding, editing, and deleting a phone number on a CRM contact, and linking a phone number to a contact.
- Disabling a record is logged as an Update showing Enabled → Disabled, distinct from a Delete. Deactivating a user (Active: Yes → No) is likewise recorded separately from deleting one.
- All new activity appears alongside existing tracked changes in the Organization and Community Activity Tracking listings, following the same formatting and grouping as the existing audit framework.
- Browsing actions are not tracked — search, status filters, column sorting, tab switching, and paging generate no audit entries.

What This Means

- Administrators have a clear audit trail for user account and permission changes, supporting access reviews and security investigations without relying on memory or manual records.
- Configuration changes to community Lists are now traceable, so an unexpected change to a discharge reason, insurance provider, or note type can be tracked to a specific user and time.
- CRM record changes are now auditable, so Support and sales leadership can determine who edited a Prelead, Prospect, or Influencer — and when a Prelead was converted — without reconstructing history from memory.
- Because previous and new values are captured, troubleshooting a configuration problem shows what the setting was before it changed, not just that it changed.
- Audit history for these areas lives in the same Organization and Community Activity Tracking listings as everything else, keeping compliance review in one place.

Service Plan: Longer Instructions

The Service Plan Instructions field now accepts up to 2,500 characters, up from 500, so staff can document complete care instructions without abbreviating or moving detail into supplemental notes.

Navigation: Resident record → Services tab → Service Plan (Active and All Services) | Resident record → Services tab → Plan of Care | Resident record → Medical tab → Evaluations → Service Plan Instructions or Plan of Care Instructions

What's New

- The Service Plan Instructions character limit has increased from 500 to 2,500 characters.



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- The expanded limit applies wherever instructions are entered — the Service Plan form, Care Plan form, Plan of Care, and Evaluations.
- Character validation reflects the new limit, and a clear validation message displays if 2,500 characters is exceeded.
- Full instructions display without truncation in Service Plan views, Plan of Care, and Daily Cares, with text wrapping correctly rather than overlapping or breaking page layouts.
- Printed Service Plans, printed Plans of Care, PDF exports, and reports render the complete instruction text.
- APIs and integrations that create, update, or consume Service Plan Instructions support the increased limit without truncating data.
- Existing Service Plans and their saved instructions are unaffected and continue to work as before.

What This Means

- Caregivers see complete care instructions in Daily Cares rather than text that was shortened to fit, reducing the risk of missing an important detail at the point of care.
- Nurses and care coordinators no longer need workarounds like splitting instructions across resident notes to capture full detail.
- Because the expanded text carries through to printed plans, exports, and integrations, the same complete instruction appears everywhere the Service Plan is referenced.

Integrations

New: Carefeed Integration

Eldermark NEXT now integrates with Carefeed, keeping resident and family-contact information synchronized between the two systems so communities don't maintain the same records twice. The integration is currently in pilot and will roll out more broadly soon.

What's New

Resident and family-contact information entered in Eldermark NEXT now flows automatically to Carefeed, where it supports resident communication and family engagement workflows.

- **Data direction is one-way.** Eldermark NEXT sends data to Carefeed. Carefeed does not create or update resident or contact records in Eldermark NEXT.
- **Near-real-time updates.** When a subscribed data point changes in Eldermark NEXT, a small event notification is sent and Carefeed retrieves the resident's current information.



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- **One subscription per community.** Each Eldermark community has its own Carefeed connection.
- **Nightly reconciliation.** Carefeed performs a full reconciliation each night and can re-pull an individual resident on demand, so records stay aligned even if a single update doesn't deliver.

Availability

The Carefeed integration is currently in a limited pilot and will become available more broadly in an upcoming release.

To get connected: Reach out to your Customer Success Manager.

What Information Is Shared

Carefeed retrieves resident details from the domains below and stores only the fields its workflows require.

Domain	Fields Carefeed Uses	Update Timing
Resident Basic	Resident ID, community ID, first name, last name, date of birth, deleted indicator	Event-driven plus nightly reconciliation
Demographics	Gender, email, primary and secondary phone, language, marital status, religion	Event-driven plus nightly reconciliation
Family Contacts	First name, last name, relationship, phones, emails, address, designations, emergency indicator	Event-driven plus nightly reconciliation
Census	Admit and discharge date and time, unit, deceased indicator	Event-driven plus nightly reconciliation
Medical Records	Medical record number, primary care provider name	Nightly reconciliation or on-demand re-pull

Medical Records data is not currently event-subscribed, so changes to a medical record number or primary care provider name reach Carefeed through the nightly reconciliation rather than immediately.

What This Means

- Community administrative and care staff maintain resident and family-contact information once, in Eldermark NEXT, rather than entering it separately in Carefeed.
- Family members receive Carefeed communications based on current contact information, reducing missed messages from outdated phone numbers or email addresses.



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- Because census changes are included, Carefeed reflects admissions, discharges, and unit changes without manual updates.
- Since data flows only from Eldermark NEXT to Carefeed, Eldermark NEXT remains the system of record — changes made in Carefeed do not overwrite resident or contact data.

Integrator API Enhancements

This release expands the Integrator API with resident updates, access to pre-admit and discharged residents, a new user directory, service catalog configuration lookup, and the ability to retry failed webhook deliveries — giving integrated systems more complete control over resident and configuration data.

Update an Existing Resident

Integrators can now update an existing resident using the Resident ID, instead of creating a duplicate record when data changes.

What's included:

- Updates to basic identity, demographic, and SSN fields — including name, prefix, suffix, birthdate, gender, gender identity, pronouns, race, primary language, phone, email, and extended profile details such as faith, culture, biography, lifestyle, and background
- Partial updates — only the fields included in the request are changed; everything else stays as-is
- Previous Address is treated as a full replacement, matching the behavior of the Resident Contact endpoint
- Unit ID and Move-In Date can be updated only while a resident is still pre-admit; after admission these fields are ignored and require a Census update instead
- Integration IDs and historical data are preserved, and non-blank fields aren't overwritten unless explicitly included
- Other resident domains — Census, Medical, Vitals, and Care Planning — continue to use their own dedicated endpoints

Retrieve Pre-Admit, Discharged, and Historical Residents

The Resident List endpoint now returns resident populations beyond currently active residents, supporting lifecycle tracking and historical reporting.

What's included:

- A residentStatus filter with values ADMITTED, PRE_ADMIT, NO_ADMIT, DISCHARGED, and ALL
- PRE_ADMIT returns residents still expected to move in; NO_ADMIT returns lost pre-admits who were archived and will not be moving in



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- Date-range filtering on admit and discharge dates, using from and to parameters independently or together
- A residentStatus indicator returned in the response so integrators can identify each resident's lifecycle stage
- Existing response fields are unchanged, and the default behavior remains active residents only — existing integrations continue to work without modification

User Directory by Organization

A new endpoint returns the users associated with an organization.

What's included:

- Active and inactive users for the requested organization, each returning User ID, first and last name, username, title, email, phone, and status
- Organization access designation and community access, including the security roles held in each community
- A User ID that is unique across the platform and immutable once assigned
- Standard pagination, and an empty collection returned when an organization has no users
- Standard error responses for unauthorized organization access and organizations that don't exist

Service Catalog and Assignment Lookup

Integrators can now retrieve a community's configured Services and Assignments, rather than hard-coding values that resident care endpoints require.

What's included:

- Enabled Service Catalog records returned with service name, category, role, planned minutes, description, equipment needed, health monitoring requirements, location, and exclusions
- Enabled Assignments returned with assignment name, shift, and role
- Disabled Services and Assignments are automatically excluded, so integrators only receive values currently valid in the application
- Communities with no configured Services or Assignments return empty collections rather than an error
- Standard error responses for an invalid Community ID, authentication failure, or authorization failure



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Retry a Failed Webhook Message

Administrators can now manually retry a failed webhook delivery directly from the Failed Webhooks list, recovering from temporary delivery failures without waiting for an automatic retry.

Navigation: Clinical → Organization → Failed Webhooks

What's included:

- A Retry action on each row of the Failed Webhooks list, available for messages in a Push Failed or Retry Failed state
- Retry is disabled while a message is already in Retry Processing, preventing duplicate concurrent attempts
- Successful retries remove the message from the failed list and confirm with a success message
- Failed retries keep the message in the list with an updated attempt count and last attempt timestamp, and display the reason
- Retries are scoped to the administrator's own organization, and retry attempts are logged without exposing payloads or credentials

What This Means

- Integrators can keep resident demographic data synchronized over time without creating duplicate records from repeated create requests.
- Access to pre-admit, discharged, and historical residents supports CRM synchronization, discharge workflows, and census history reporting that previously required incomplete data.
- The user directory gives integrators the User IDs needed for SSO mapping and for user attribution in future API endpoints.
- Retrieving Service Catalog and Assignment values dynamically means integrations no longer break when a community changes its configuration.
- Failed webhook deliveries can be recovered on demand, reducing the risk of silent data sync gaps between Eldermark NEXT and connected systems

