



Release Notes 2026.9

This release delivers enhancements across CRM, Census and Clinical that improve usability and strengthen reporting. Updates include new listing pages and search in CRM, dated Unit History and rate calculations in Census, a set of enhancements to the Cares module, configurable Census History on clinical forms, and printing for Activity Tracking.

Highlights

- **CRM Enhancements** – Each contact type now has its own list page with its own filters, columns and sorting, joined by a persistent top bar for Quick Add and global search, editable resident profiles after move-in, and a new Reservations list.
- **Census and Unit Management** – Dated Unit History, calculated Current Monthly and Current Daily Rates, and the ability to convert units between private and shared configurations support accurate historical, rate and occupancy reporting.
- **Cares Enhancements** – An alert when documenting outside your shift, unscheduled services for any past date, a New Unscheduled action on the Care screen, and a secondary sort by resident or unit reduce documentation errors and steps when working an assignment.
- **Reporting and Forms** – Census History is now configurable on the Facesheet and Service Agreement, the Evaluation Due Report consolidates filtering and columns into one panel, and the Code Status and Diet Reports link directly into the resident chart.
- **Activity Tracking and Risk Management** – Activity listings, activity detail and login history can now be printed for audit, and the updated list experience extends to Risk Management and Incidents.
- **Integrator API Updates** – Additional community and census data, a created-resident webhook, Brand ID in the organization endpoints, and a POST endpoint for unscheduled services.

Together, these updates improve usability, strengthen reporting, and provide a more consistent experience across Eldermark NEXT.

Contents

CRM	3
Top Bar: Quick Add and Search.....	3
Contact Creation: Sales Activity Now Required	3
People Pages: Dedicated Lists by Contact Type	4
People: Preleads	5
People: Prospects	5
People: Influencers	6
People: Professional Contacts.....	7



NEXT Release Notes

People: Professional Referring Organizations	8
People: Residents	9
Lists: Waitlists	10
New: Reservations List.....	11
Digital Leads Replaces Prospect Review	12
Resident Profiles: Editable After Move-In	12
Individual Add Cards: Modernized Layout	12
Terminology Update: “Living Preference” is now “Care Preference”	12
Influencers: Prospect Name Required When Adding.....	13
Sales Status: Now Available for Reporting	13
Action Required: Set Up Your Sales Statuses	13

Census..... 14

Unit History: Dated Records for Unit Changes	14
Unit History: Floor Plan Rate Rules	15
Unit Profile: Current Monthly and Current Daily Rates.....	16
Unit Configuration: Converting Between Private and Shared.....	16
Unit Profile: Amenities and Notes.....	18

Clinical..... 19

Daily Cares: Alert When Documenting Outside Your Shift.....	19
Unscheduled Services: Documentation for Any Past Date.....	20
Care: Secondary Sort by Resident or Unit	21
Care: Add an Unscheduled Service Without Leaving the Care Screen	21
Forms: Census History on the Facesheet and Service Agreement	24
Health Insurance: Status Field Removed	26
Services Tab: Last Assessed Date Shows the Completed Date.....	27
State Fields: Type an Abbreviation to Select.....	27
Evaluation Due Report: One Panel for Filters and Columns.....	28
Resident Notes Report: New Default Date Range and Sort	29
Reports: Hyperlinks into the Resident Chart.....	29
Clinical Fixes.....	30

Risk Management..... 31

List Screens: Risk Management and Incidents	31
---	----

Integration 32

Integrator API: Community Data in Community Endpoints	32
Integrator API: Post an Unscheduled Service for a Resident.....	33
Integrator API: Additional Data in the Resident Census Domain	34
Integrator API: Webhook Trigger for a Created Resident	34
Integrator API: Brand ID in the Organization Endpoints	34
Integrator API: Residents Ready for Evaluation	35
New Pharmacy Integration: PrimeRX.....	35



NEXT Release Notes

CRM

Top Bar: Quick Add and Search

A persistent top bar now carries Quick Add and global search on every CRM screen, so a new profile can be created or an existing person found without leaving the page in progress.

Navigation: CRM → Top bar

What's New

- The + button beside the search bar opens a quick-entry window for a new profile, returning the user to the page they were on after saving.
- Soft search returns the most recent matches as a name is typed, directly below the search bar; selecting one opens that profile.
- Hard search opens a full results page when the top matches aren't enough to find the right person.
- Search covers every contact type — preleads, prospects, residents, influencers and referral contacts — from a single box.

What This Means

- Inquiries can be logged the moment they happen rather than later from handwritten notes, keeping lead counts and response times accurate.
- Finding a person no longer requires knowing which tab they live under.

Contact Creation: Sales Activity Now Required

Creating a prospect, prelead, or primary influencer now requires recording a sales activity in the same window, so every new contact enters the CRM with a documented first touch. Professional contacts will be optional with activity upon creation to allow adding an initial outreach activity when needed.

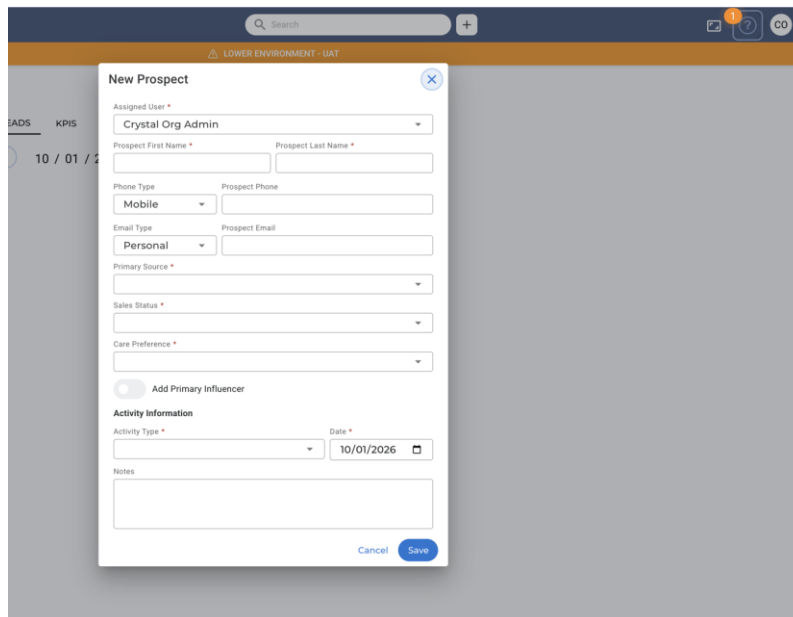
Navigation: CRM → Quick Add → Activity Information

What's New

- Activity Type and Date are required in the Activity Information section, and the contact cannot be saved without them.
- The date defaults to today, and Notes remain optional.
- Applies when creating a new prospect, prelead, influencer or professional contact.
- Before saving, select the activity that started the relationship — a call in, walk-in or tour — and confirm the date.



NEXT Release Notes



What This Means

- Activity counts and reports stay complete, because no contact enters the CRM without a first activity recorded.
- There is no longer a need to save a contact, reopen the profile and add the activity separately.

People Pages: Dedicated Lists by Contact Type

Each type of person in the CRM now has its own list page under People, built around the information that matters for that group. Previously Prospects, Preleads, Referrers and Residents shared a single Contacts screen with fixed columns and filter chips.

Navigation: CRM → People → Preleads | Prospects | Influencers | Prof Contacts | Prof Org / Source | Residents

What's New

Every People page is built on the same set of list tools:

- Quick filters across the top offer one-click dropdowns for the filters used most on that page, such as Sales Status, Assigned User or Care Level.
- The Filters panel on the right edge filters by nearly any field on the page, including dates, city, state, zip, referrer and created by.
- The Columns panel shows, hides and reorders columns, so each user sees the fields they care about.
- Selecting a column header sorts the list ascending or descending.
- Dragging a column into Row "Groups", groups the list — for example, prospects by Assigned User or Care Level.
- A search box beside each page title narrows the list currently open.

NEXT Release Notes

- Default returns the page to its standard view, and Action holds the actions available for the records selected.

What This Means

- Sales directors can build a pipeline review in seconds rather than exporting to a spreadsheet.
- Counselors can open a page already focused on their own follow-ups.
- The list that opens is already shaped for the work being done, instead of a general contacts list that has to be filtered down first.

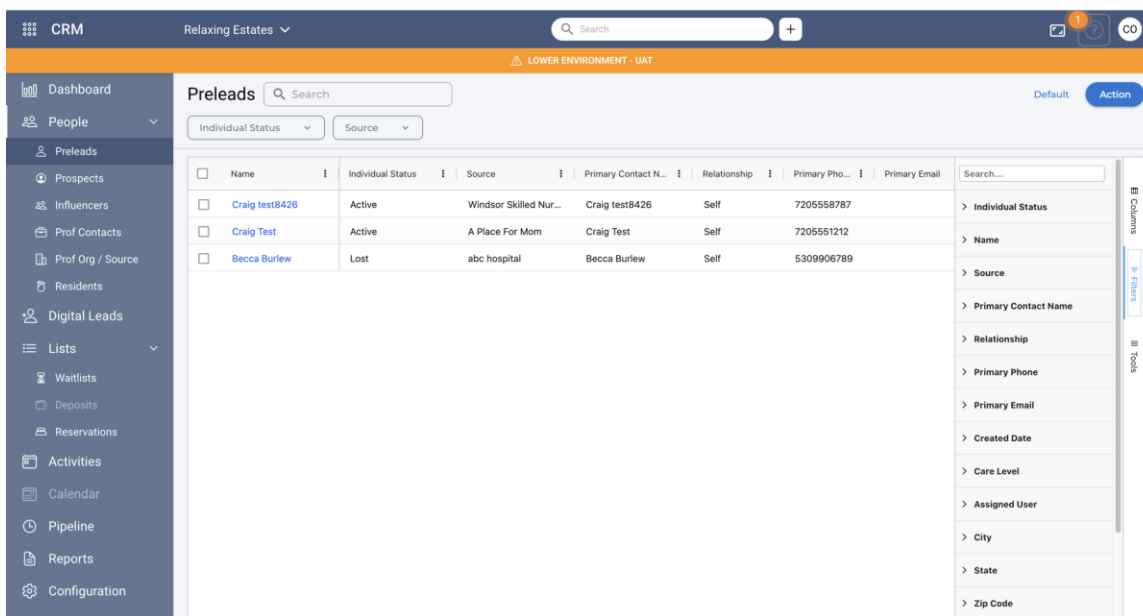
People: Preleads

People who aren't ready to be prospects yet now have a page of their own, with filters built around how preleads are worked.

Navigation: CRM → People → Preleads

What's New

- Quick filters for Individual Status and Source.
- The Filters panel adds Care Level, Assigned User, Referrer Name, Referrer Org Name, Birthdate and Created By.



The screenshot shows the CRM interface for the 'Preleads' section. The top navigation bar includes 'CRM', 'Relaxing Estates', a search bar, and a '+'. Below this is a status bar 'LOWER ENVIRONMENT - UAT'. The left sidebar contains a menu with 'Dashboard', 'People', 'Preleads', 'Prospects', 'Influencers', 'Prof Contacts', 'Prof Org / Source', 'Residents', 'Digital Leads', 'Lists', 'Waitlists', 'Deposits', 'Reservations', 'Activities', 'Calendar', 'Pipeline', 'Reports', and 'Configuration'. The main content area is titled 'Preleads' and includes a search bar and two filter buttons: 'Individual Status' and 'Source'. Below these is a table with columns: Name, Individual Status, Source, Primary Contact N..., Relationship, Primary Pho..., and Primary Email. The table contains three rows of data. To the right of the table is a 'Filters' panel with expandable sections for Individual Status, Name, Source, Primary Contact Name, Relationship, Primary Phone, Primary Email, Created Date, Care Level, Assigned User, City, State, and Zip Code.

☐	Name	Individual Status	Source	Primary Contact N...	Relationship	Primary Pho...	Primary Email
☐	Craig test8426	Active	Windsor Skilled Nur...	Craig test8426	Self	7205558787	
☐	Craig Test	Active	A Place For Mom	Craig Test	Self	7205551212	
☐	Becca Burlew	Lost	abc hospital	Becca Burlew	Self	5309906789	

People: Prospects

The working pipeline has its own page, with color-coded Sales Status so the warmest leads stand out at a glance.

Navigation: CRM → People → Prospects

What's New



NEXT Release Notes

- Six quick filters: Individual Status, Assigned User, Sales Status, Sales Stage Plan, Source and Care Level.
- Sales Status displays as a color-coded badge — Warm or Cold, for example.
- Additional columns including Prospect Date, Created Date, City, Referrer Name and Birthdate can be turned on from the Columns panel.

The screenshot shows the CRM interface for the 'Prospects' section. The top navigation bar includes 'CRM', 'Relaxing Estates', and a search bar. The left sidebar lists various CRM modules. The main content area displays a table of prospects with columns: Name, Individual Status, Sales Status, Sales Stage Plan, Care Level, Source, and Primary Contact. The Sales Status column uses color-coded badges: 'Warm' (orange) and 'Cold' (blue). The right sidebar contains a 'Columns' panel with a search bar and a list of fields that can be added to the table, including Individual Status, Name, Sales Status, Sales Stage Plan, Care Level, Source, Primary Contact Name, Relationship, Primary Phone, Primary Email, Prospect Date, Assigned User, Created Date, Individual Type, City, State, Zip Code, Referrer Name, Referrer Org Name, and Birthdate.

This screenshot is similar to the one above, showing the CRM Prospects page. The 'Columns' panel on the right is expanded, showing a list of fields that can be added to the table. The fields include Individual Status, Name, Sales Status, Sales Stage Plan, Care Level, Source, Primary Contact Name, Relationship, Primary Phone, Primary Email, Prospect Date, Assigned User, Created Date, Individual Type, City, State, Zip Code, Referrer Name, Referrer Org Name, and Birthdate. The table of prospects remains the same, with color-coded Sales Status badges.

People: Influencers

Family members, friends and advisors who help make the decision now have a dedicated page showing who they are connected to and in what order to call them.

Navigation: CRM → People → Influencers



NEXT Release Notes

What's New

- Each row shows the influencer's relationship — Daughter, Son, Spouse, Attorney and others — the person they are connected to, and whether that person is a prospect or a resident.
- Call Order shows who to contact first.
- Quick filters for Related Party Type, Sales Status, Individual Status and Assigned User.

Name	Individual St...	Call O...	Phone	Phone Type	Email	Relationship	Related Party	Related Pa
Sandra Georgia	Active	3				Daughter	Jerry Georgia	Resider
mike ross	Active	2	3035551212	Cell		Son	dad UNKNOWN-RO...	Prospe
Georgia Peach	Active	2	4409998777	Cell		Cousin	Mandy Moore	Prospe
Sarah Test	Active	2				Spouse	Craig Test	Prospe
Natalie Georgia	Active	2	5307779877	Cell		Sister	Jerry Georgia	Resider
Bob Krabby	Active	2				Son	Karen Krabby	Resider
Sarah Harold	Active	1				Son	Helen Harold	Prospe
Mary Harold	Active	2	7205551212	Cell		Daughter	Helen Harold	Prospe
Wanda Willard	Active	1				Daughter In Law	Prospect Name Pen...	Prospe
Ga Ga	Active	2				Aunt	Mickey Bayer	Prospe
Jordan Gary	Active	2				Attorney	George Gary	Prospe
Don Borel	Active	1				Son	Prospect Name Pen...	Prospe
Mark Madergy	Active	1	7689985677	Cell	markismad@gmail.com	Son	Rebecca Madergy	Resider
Gertrude Garrison	Active	1			gerie@fake.com	Daughter	Sarah Keller	Resider
Georgia Peach	Active	1	2309984222	Cell		Friend	Emily Peach	Resider
Betsy Benson	Active	2	5305443467	Cell		Daughter	Allison Benson	Resider

People: Professional Contacts

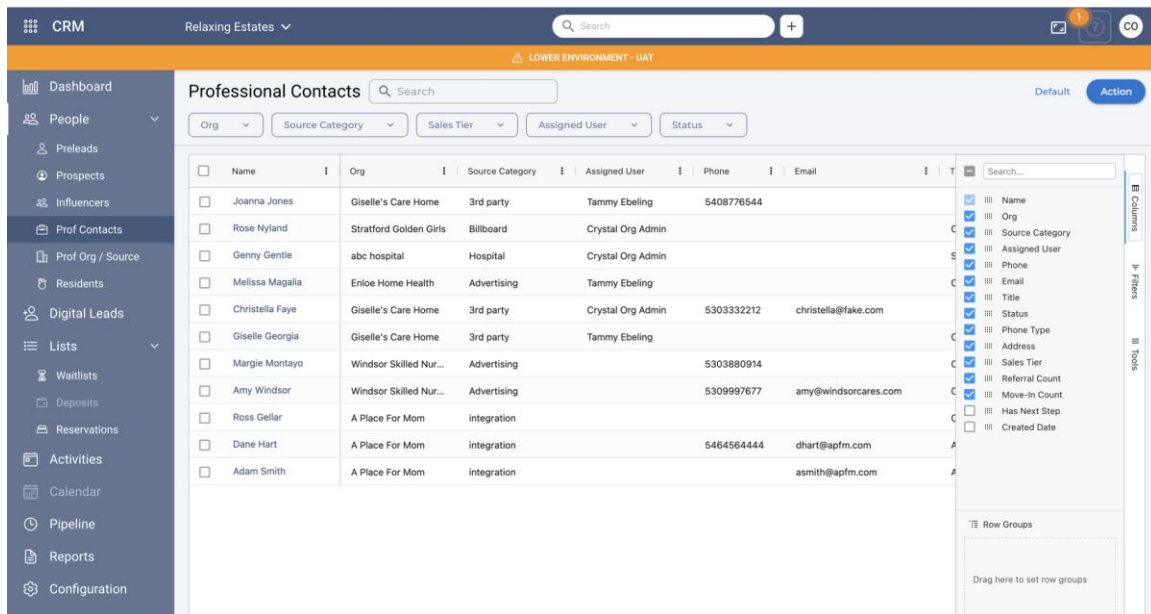
Individual referral partners such as discharge planners, case managers and placement agents now have their own page, with columns showing which relationships produce results.

Navigation: CRM → People → Prof Contacts

What's New

- Quick filters for Org, Source Category, Sales Tier, Assigned User and Status.
- New Referral Count and Move-In Count columns.

NEXT Release Notes



What This Means

- Referral relationships can be ranked by what they actually deliver, rather than by how often they are contacted.

People: Professional Referring Organizations

The hospitals, home health agencies, referral services and advertising sources behind incoming leads now have their own page.

Navigation: CRM → People → Prof Org / Source

What's New

- Filters for Org Type, State and Status.
- Connected Referrers Count, Referral Count and Move-In Count are available for each organization.



NEXT Release Notes

Org Name	Org Type	Status	Phone	Fax	Phone Type	Website
Windsor Skilled Nursing	Hospital	Active				
Charity Seniors	Advertising	Active				
Happy Everything Home Care	Website	Active				
Stratford Golden Girls	Billboard	Active	8006778999		Work	
Butte County Home Health and H	Hospital	Inactive				
Enloe Home Health	Advertising	Active	8009872345		Work	
Windchime Senior Living	Advertising	Active				
Giselle's Care Home	3rd party	Active				
Liberty Home Health and Hospic	QAWolf Referral	Active	5509889898		Cell	
Google	Advertising	Active				
Windsor Skilled Nursing Facility	Advertising	Active	5308990814		Cell	https://www.prestig
Community Website	Website	Active	1244444444		Work	
A Place For Mom	Integration	Active				https://www.aplacef
abc hospital	Hospital	Active				

What This Means

- Which sources send referrals that actually move in is visible at a glance, so outreach can focus on where it pays off.

People: Residents

Current and moved-out residents appear in one sortable list with the detail needed to keep working the relationship after move-in.

Navigation: CRM → People → Residents

What's New

- Columns include Second Occupant, Care Level, Source, Primary Contact and Primary Relationship.
- Quick filters for Individual Status, Source, Sales Status, Assigned User and Care Level.



NEXT Release Notes

Name	Individual Status	Second Occupant	Sales Status	Care Level	Source	Primary Contact Name	Primary Relationship
aa aa	Resident					aa aa	Self
Adam Eldridge	Moved Out			AL		Adam Eldridge	Self
Alex Almond	Resident			AL	A Place For Mom	Alex Almond	Self
Allison Benson	Moved Out			AL	A Place For Mom	Bernard Benson	Guardian
Allison Benson	Moved Out			AL		Allison Benson	Self
Andrea Armstrong	Resident					Andrea Armstrong	Self
Annie A	Resident			IL	abc hospital	Annie A	Self
Barry Elders	Moved Out			IL		Barry Elders	Self
BARRY SIZEMORE	Moved Out					BARRY SIZEMORE	Self
Bartholome McDuck	Moved Out			AL	A Place For Mom	Bartholome McDuck	Self
Benni Cabane	Resident					Benni Cabane	Self
Bethy Tadarich	Resident					Bethy Tadarich	Self
Betty Q	Resident			AL	abc hospital	Betty Q	Self
Bill Myers	Moved Out			AL	Community Website	Bill Myers	Self
Billie McDuck	Resident			AL	A Place For Mom	Billie McDuck	Self
Braxton McDuck	Resident			AL	A Place For Mom	Braxton McDuck	Self

Lists: Waitlists

Waitlists move into the same flexible list format as the People pages, ranked and ready to work when a unit opens.

Navigation: CRM → Lists → Waitlists

What's New

- Quick filters for Waitlist, Care Level, Floor Plan, Individual Type and Assigned User.
- Columns include Prelead Choice Priority, Rank by List Name, Rank by Floor Plan, Floor Plan / Unit Type, Waitlist Date and Days on Waitlist.
- The same filters, columns, sorting and row grouping available on the People pages.

Name	Individual Type	Prelead Choice Priority	Rank by List Name	Rank by Floorplan	Care Level	Floorplan / Unit Type	Waitlist Date	Days on Waitlist
Allison Benson	Resident	5	1	1		1 Bedroom	05/13/2025	
Helen Harold	Prospect	7	2	2		1 Bedroom	09/30/2026	



NEXT Release Notes

What This Means

- When a 1 Bedroom becomes available, filtering by that floor plan shows who is next in line without working through the full list.

New: Reservations List

Reservations now have a listing screen for the first time, so every reservation can be viewed, filtered and sorted in one place rather than opened profile by profile.

Navigation: CRM → Lists → Reservations

What's New

- Every reservation displays with its Individual Type, Reservation Status — Active, Completed or Canceled — Reserved From and To dates, and Cancel Date.
- Quick filters for Reservation Status and Unit Care Level.
- The Filters panel adds Reservation Cancel Reason, Unit, Floor plan, Unit Care Level / Product Type, Reservation Fee, Inquiry Date, Sales Status and Evaluation Request Sent.

☐	Name	Individual Type	Reservation Status	Reserved From Date	Reserved To Date	Reservation Cancel Date
☐	Judi Myers	Prospect	Canceled	03/18/2024	03/15/2024	03/15/2024
☐	Rachel Gellar	Resident	Completed	04/02/2024	04/30/2024	
☐	Peter Lisbon	Resident	Completed	04/09/2024	04/28/2024	
☐	Roger Tones	Resident	Completed	06/19/2024	06/19/2024	
☐	Holly Hop	Resident	Completed	08/21/2024	08/23/2024	
☐	Omayma CRM-2004	Prospect	Canceled	08/28/2024	07/10/2025	07/10/2025
☐	Matthew Baker	Resident	Canceled	05/07/2025	05/07/2025	05/07/2025
☐	Shelly Speers	Resident	Completed	05/09/2025	05/09/2025	
☐	Veronika Smithers	Resident	Completed	07/10/2025	07/16/2025	
☐	Rebecca Madergy	Resident	Completed	11/12/2025	11/12/2025	
☐	Jane Holland	Resident	Completed	01/28/2026	01/28/2026	
☐	Mickey Bayer	Prospect	Active	03/01/2026		
☐	Henry Blocker	Prospect	Completed	03/26/2026	03/26/2026	
☐	Prospect Name Pending	Prospect	Canceled	07/14/2026	07/14/2026	07/14/2026
☐	Jessica Jones	Prospect	Completed	07/14/2026	07/15/2026	
☐	Prospect Name Pending	Prospect	Canceled	07/14/2026	07/14/2026	07/14/2026

What This Means

- Every active reservation and its dates can be seen in one view to plan move-ins.
- Cancellations and their reasons can be tracked to spot patterns and protect occupancy.
- Reservation fees and evaluation requests can be confirmed without opening each profile.

NEXT Release Notes

Digital Leads Replaces Prospect Review

Leads from A Place for Mom now arrive in Digital Leads, a dedicated item in the left menu that replaces the Prospect Review screen.

Navigation: CRM → Digital Leads

What's New

- A Place for Mom (APFM) leads arrive in the Digital Leads tab.
- Digital Leads replaces the Prospect Review screen.

What This Means

- Online leads are time-sensitive, and a clearly labeled place for them makes it easier to see what came in and respond quickly.
- Each lead can be moved into the pipeline without hunting for it among other contact types.

Resident Profiles: Editable After Move-In

Converting a prospect to a resident no longer closes the profile to further work — it stays editable in the CRM so the relationship can continue after move-in.

Navigation: CRM → People → Residents → resident profile

What's New

- New activities can be added, such as post-move-in check-ins or family follow-ups.
- The full history of activities from the prospect journey remains viewable.
- Demographics can be added or updated as details change.

What This Means

- Residents and their families are a primary source of referrals and reviews, and can now be nurtured in the same place the relationship started.

Individual Add Cards: Modernized Layout

Individual Add cards have a cleaner layout that puts key details up front, making information quicker to scan and update.

What's New

- Cards use a modernized layout with key details presented first.

Terminology Update: "Living Preference" is now "Care Preference"

The field formerly called Living Preference now reads Care Preference everywhere in the CRM. This is a terminology update only — existing data is unaffected.

What's New

- Care Preference replaces Living Preference in profiles, list pages, filters and reports.
- Existing data carries over unchanged; only the label has changed.



NEXT Release Notes

What This Means

- The new label reflects how families shop for senior living — by the level of care they need.

Influencers: Prospect Name Required When Adding

Creating a new influencer now requires the name of the prospect they are connected to, keeping every influencer tied to the right person.

Navigation: CRM → Quick Add → Influencer

What's New

- The prospect's name is required when creating a new influencer.
- Where the prospect's name isn't known yet, enter the relationship as the name — "Mom," "Dad" or "Brother" — and update it once the name is known.
- Where the influencer's details are known but there is genuinely no information about the prospect, enter the influencer as a prelead until more is gathered.
- Enter "Unknown" as a last resort.

What This Means

- Every influencer stays tied to the right person, so relationships, follow-ups and reporting remain accurate.

Sales Status: Now Available for Reporting

Sales Status is now reportable and appears as a filter and a color-coded badge on the Prospects, Residents and Influencers pages.

Navigation: CRM → Configuration → Sales Statuses

What's New

- Sales Status is available for reporting.
- Sales Status appears as a filter and a badge on the Prospects, Residents and Influencers pages.
- Statuses are defined per community in Configuration.

What This Means

- A consistent Sales Status lets leadership see how warm the pipeline really is, compare communities, and forecast move-ins more accurately.

Action Required: Set Up Your Sales Statuses

Because Sales Status now drives reporting, filtering and badges, each community should set up its Sales Statuses in Configuration before or soon after the update.

Navigation: CRM → Configuration → Sales Statuses



NEXT Release Notes

Steps to Complete

- Agree on a status scale as a team — for example Hot, Warm, Cold — and what each one means.
- Add the statuses in Configuration.
- Link an Eldermark Category
- Ask the sales team to update Sales Status on their active prospects.
- Use the Sales Status filter on the Prospects page to review the pipeline.

What This Means

- Until statuses are configured, the Sales Status filter, badges and reporting have nothing to report on.

Census

Unit History: Dated Records for Unit Changes

Unit History now tracks changes to commonly updated unit information over time, so a unit can be updated without overwriting what was true before.

Navigation: Census → Units → Unit Details → Unit History

What's New

- Authorized users manage dated history records directly from the Unit Details page.
- Each history record can include Start Date and End Date, Floor Plan, Product Type, Monthly Rate and Daily Rate, Monthly and Daily Rate Adjustments, Rate Adjustment Note or Reason, Service Status, Quantity representing the unit's occupancy capacity, and a Government Assistance indicator.
- Creating a new record carries forward values from the most recent history record for easier editing.
- Start Date defaults to the current date and End Date defaults to blank.
- The prior record is automatically ended when the new record becomes effective, maintaining continuous and accurate history periods.
- When adding a new unit, add a corresponding Unit History row.

Unit History											New
Start Date	End Date	Floor Plan	Product Type	Monthly Rate	Monthly Adj	Daily Rate	Daily Adj	Adj Note	Service Status	Qty	Gov
10/07/2026	---	1 Bedroom	Assisted Living	\$4.00	---	\$4.00	---	---	In Service	1.00	No
04/24/2025	10/06/2026	1 Bedroom	Assisted Living	\$4.00	---	\$4.00	---	---	In Service	1.00	No

Initial Records at Launch



NEXT Release Notes

Upon release, an initial Unit History entry will be created for each eligible unit and subunit using its current information, including status, floor plan and care level. These entries take effect on the launch date and provide a starting point for tracking future changes. They do not reconstruct earlier changes to a unit.

What This Means

- Unit, rate and occupancy reporting stay accurate over time, because updating a unit no longer overwrites historical information.
- A rate change can be recorded with the date it took effect, rather than replacing the previous rate with no record of when it changed.

Unit History: Floor Plan Rate Rules

Where an active floor plan rate applies to a unit, that rate governs the period and cannot be overridden on the Unit History record.

What's New

- Active floor plan rates are not copied into Unit History. They are shown in the creation modal and identified by Rate Source = Floor Plan.
- While an active floor plan rate applies, a Monthly Rate or Daily Rate cannot be entered on the Unit History record for that period.
- A Unit History rate can be entered when its Start Date falls after the applicable floor plan rate has ended.
- Monthly and Daily Adjustments apply whether the current base rate comes from the floor plan or from Unit History.

New Unit History	New Unit History
Start Date* 10/07/2026 End Date	Start Date* 10/08/2026 End Date
Floor Plan* 2 Bedroom	Floor Plan* 1 Bedroom
Monthly Market Rate \$1,000.00	Monthly Market Rate \$4.00
Source: Floor Plan	Source: Rate History
Daily Market Rate \$35.00	Daily Market Rate \$4.00
Source: Floor Plan	Source: Rate History
Monthly Adj \$200.00	Monthly Adj
Daily Adj \$5.00	Daily Adj
Adj Note Mountain view	Adj Note

What This Means



NEXT Release Notes

- Rates stay traceable to a single source for any given period, avoiding conflicting floor plan and unit-level values.

Unit Profile: Current Monthly and Current Daily Rates

The Unit Profile now displays calculated Current Monthly Rate and Current Daily Rate fields, identifying the rates in effect for that unit today.

Navigation: Census → Units → Unit Profile

What's New

Where an active floor plan rate is linked to the unit, it takes priority:

- Active Monthly Floor plan Rate $\pm$ Active Monthly Adjustment = Current Monthly Rate
- Active Daily Floor plan Rate $\pm$ Active Daily Adjustment = Current Daily Rate
- Where no active floor plan rate applies, the active Unit History rate is used instead:
Active Unit History Monthly Rate $\pm$ Active Monthly Adjustment = Current Monthly Rate,
and Active Unit History Daily Rate $\pm$ Active Daily Adjustment = Current Daily Rate.

What This Means

- Billing and operational workflows can rely on a single current rate per unit rather than deriving it from floor plan.
- Monthly and/or Daily Adjustments can be added when the rate comes from the floor plan or from the unit history.
- The rate in effect is visible on the profile, so staff don't need to work out which source applies.

Unit Configuration: Converting Between Private and Shared

Units with sub-units can now be converted between private and shared leasing configurations. Previously a unit's configuration could not be changed once it had been set up for leasing as either a full private unit or as shared sub-units.

Navigation: Census → Units → Unit Profile

What's New

- The new Add Sub-Unit action adds sub-units to a full unit at any time, and users can navigate between the primary unit and its sub-unit profiles.



NEXT Release Notes

← Units

Unit: 111 Private Status: ENABLED Service Status: ---

Sub-units

[Add a Sub-Unit](#)

- “Make Shared” button disables the private unit, enables the linked sub-units, and updates Unit History for the private unit and its sub-units. Current residents must be assigned to specific sub-units before the conversion can be completed.

← Units

Unit: 102 Private Status: ENABLED Service Status: In Service

Sub-units

102 - 102A Status: DISABLED Service Status: Disabled >

102 - 102B Status: DISABLED Service Status: Disabled >

[Add a Sub-Unit](#)

[Make Shared](#)

Shared

Assign each active resident to a different sub-unit before converting this unit to Shared.

Hunter, Harper

Unit

Jones, Janessa

Unit

Cancel

Save

- “Make Private” button disables the linked sub-units, enables the primary private unit, and updates Unit History for the private unit and its sub-units. Users confirm the reassignment of current residents to the full unit before completing the conversion.



NEXT Release Notes

← Units

Unit: 101 Shared Status: DISABLED Service Status: Disabled

Sub-units

101 - A	Status: ENABLED	Service Status: In Service	>
101 - B	Status: ENABLED	Service Status: In Service	>

Add a Sub-Unit
Make Private

Private ×

Active sub-unit residents will be transferred to 102.

Schwartz, Betty Blue 102 - 102A

Cancel Save

- Occupancy History is updated for the private unit, the sub-units and the affected residents in both directions.
- Safeguards prevent disabling a unit with an active resident, lease or reservation; leaving a resident assigned to an inactive unit or sub-unit; assigning multiple residents to the same sub-unit during conversion; and deleting unit records required for historical reporting.

What This Means

- Leasing configuration can change as needs change, instead of being fixed at the point the unit was first set up.
- Unit and occupancy history are preserved through the conversion, so historical reporting stays intact.
- Residents cannot be stranded on an inactive unit or doubled up on a sub-unit, because the conversion will not be completed until assignments are resolved.

Unit Profile: Amenities and Notes

The Unit Profile now includes Unit Amenities and Unit Notes fields for documenting features and considerations specific to an individual unit.

Navigation: Census → Units → Unit Profile

What's New

- Unit Amenities records the unique desired features and characteristics associated with a unit.
- The Note field captures important details about a unit.

NEXT Release Notes

Profile

Station Floor 1	Pharmacy Unit ---
Floor Plan 1 Bedroom	Space 10 sq ft
Current Monthly ---	Current Daily ---
Amenities Attached Garage, Fireplace	
Note Newly remodeled Unit	

What This Means

- Staff can record what distinguishes a specific unit where leasing and care staff will actually see it, rather than keeping it in separate notes or local knowledge.

Clinical

Daily Cares: Alert When Documenting Outside Your Shift

Documenting a Daily Care outside the shift tied to the selected assignment now raises an alert, prompting staff to check the date and assignment before saving. This primarily helps NOC staff, whose Daily Care page shows two overlapping shifts.

Navigation: Clinical → Care → select assignment → Resident → Daily Care | Resident record → Daily Care → select assignment

What's New

- When a Daily Care's scheduled service time falls outside the shift associated with the selected assignment, an alert displays: "You are documenting a service delivery outside of your shift. Please check the date and assignment to ensure you are documenting on the correct date and time."

 **Shift Alert**

You are documenting a service delivery outside of your shift. Please check the date and assignment to ensure you are documenting on the correct date and time.

CancelContinue with Save

- The allowed window includes a one-hour grace period before the shift starts and one hour after it ends. A 7:00 AM–3:00 PM shift is treated as active from 6:00 AM to 4:00 PM, and a service outside that window triggers the alert.



NEXT Release Notes

- The alert is informational rather than a hard stop. Continue with Save completes the documentation, and Cancel stops the save — Cancel does not remove the service.
- Overnight shifts are treated as one continuous window. A 10:00 PM–6:00 AM shift is treated as 9:00 PM to 7:00 AM, with the current community-local time determining whether that shift started yesterday or starts today.
- All-day shifts never trigger the alert.
- PRN / as-needed services are evaluated against the current community-local time on the service's date, rather than an originally scheduled time.

What This Means

- NOC staff working across two shifts on the same Daily Care page are prompted before saving, which is where most mis-documentation happens.
- Because the alert is informational, staff documenting legitimately outside their shift — covering a call-out or finishing a late pass — can continue without being blocked.
- Fewer corrections after the fact, so service delivery records and the reports built on them stay accurate.

Unscheduled Services: Documentation for Any Past Date

An Unscheduled Service can now be documented for any date in the past. The restriction that blocked documentation more than one day back has been removed, so care delivered over a weekend, a holiday, or during a staffing gap can still be recorded and billed.

Navigation: Resident record → Daily Care → Unscheduled → select assignment → New Unscheduled | Clinical → Care → select assignment → New Unscheduled

What's New

- Support Staff and above can create an Unscheduled Service for any date in the past, with no historical date limit.
- The error "Unscheduled services cannot be documented more than one day in the past" no longer displays for authorized users.
- Historical Unscheduled Services can be created from Resident → Daily Care → Unscheduled, or from Clinical → Care.
- An assignment must be selected before the Unscheduled Service can be created.
- All existing required fields and validation continue to apply, and a historical service follows the same completion and documentation workflow as any other Unscheduled Service.
- Eligible historical Unscheduled Services continue through the existing billing process.

What This Means

- Care delivered when documentation could not be completed on the same day can still be recorded accurately, rather than being lost because the entry window had closed.



NEXT Release Notes

- Billable services that previously fell outside the one-day window can now be captured, reducing revenue leakage.
- Because a historical entry follows the same workflow, validation and audit history as any other Unscheduled Service, the record is complete rather than a workaround.

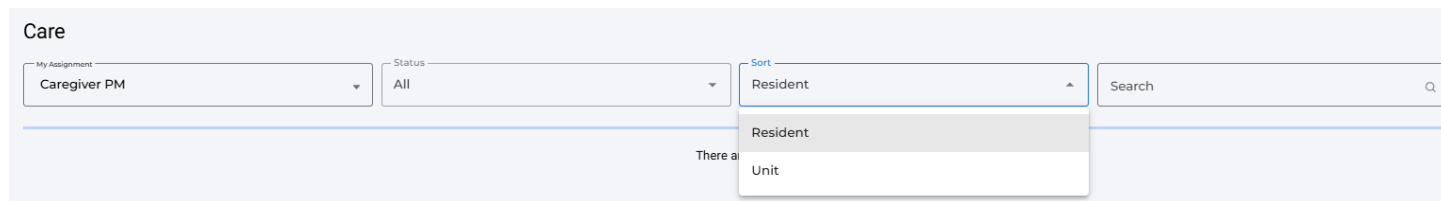
Care: Secondary Sort by Resident or Unit

A Sort dropdown on the Care screen now controls how residents are ordered within each time group, so a shift can be worked in the order that suits the community — alphabetically by resident, or by unit.

Navigation: Clinical → Care

What's New

- A Sort dropdown on the Care screen offers two options: Resident and Unit.



The screenshot shows the 'Care' screen interface. At the top, there are three dropdown menus: 'My Assignment' (set to 'Caregiver PM'), 'Status' (set to 'All'), and 'Sort' (set to 'Resident'). To the right of the 'Sort' dropdown is a search bar labeled 'Search'. Below the 'Sort' dropdown, a menu is open showing two options: 'Resident' (highlighted) and 'Unit'. The background of the screen is light gray, and the text is in a clean, sans-serif font.

- Time remains the primary sort. The secondary sort determines the order of records within each time group.
- Resident sorts alphabetically by last name within each time group, consistent with the Resident listing, and is the default.
- Unit sorts by unit number within each time group.
- The selection is retained for the current login session — navigating away from Care and returning keeps it — and resets to Resident at the next login.
- Changing the secondary sort does not change the selected My Assignment or Status, and search, expand and collapse all continue to work with a sort applied.
- The secondary sort changes display order only. Scheduled times, assignments, service status, and resident data are unaffected.
- On mobile, the Sort and Search fields appear in their own row below My Assignment and Status, so the fields remain readable on smaller screens.

What This Means

- Caregivers can work a time group in the order they actually move through the building — by unit — or in the order they look residents up, by name.
- Because the choice is per user and per session, two caregivers working on the same assignment can each use the order that suits them without affecting the other.

Care: Add an Unscheduled Service Without Leaving the Care Screen

A New Unscheduled button on the Care screen opens the existing Unscheduled Service modal with a resident search built in, so care provided outside a resident's schedule can be documented without leaving Care to find the resident record.



NEXT Release Notes

Navigation: Clinical → Care → select assignment → New Unscheduled

What's New

- New Unscheduled appears to the right of Search on the Care screen, and directly below the fields on mobile.

The screenshot shows the top of the 'Care' screen. It includes three dropdown menus: 'My Assignment' (set to 'Caregiver PM'), 'Status' (set to 'All'), and 'Sort' (set to 'Resident'). To the right of these is a 'Search' input field with a magnifying glass icon. Further right is a blue button labeled 'New Unscheduled'.

- The button is disabled until an assignment is selected.
- Selecting it opens the existing Unscheduled Service modal with a Resident search field at the top, showing "Search Resident" until a resident is chosen.

The screenshot shows the 'Unscheduled Service' modal. It has a title bar 'Unscheduled Service'. Below it are two search fields: 'Resident' and 'Service', each with a magnifying glass icon. At the bottom right are two buttons: 'Cancel' and 'Save'.

- The Resident field supports type-ahead search by name, with results listing Resident, Unit and Birthday so the right person can be confirmed before selecting.

The screenshot shows the 'Unscheduled Service' modal with the 'Resident' dropdown menu open. The dropdown displays a table of residents with columns 'Resident', 'Unit', and 'Birthdate'. The table lists five residents: Anderson, Donna; Bennette, Bonita; Bergstrom, Emmerson; and Blackhert, Hudson. The 'Save' button is highlighted.

Resident	Unit	Birthdate
Anderson, Donna	01	07/24/1933
Bennette, Bonita	25	01/03/1956
Bergstrom, Emmerson	14 - B	08/08/1936
Blackhert, Hudson	19	08/19/1988

- Selecting a resident closes the dropdown and displays the name in the field; the selection can be cleared and searched again.
 - Once a resident is selected, the existing unscheduled service workflow applies unchanged — Service, Reason, Minutes, Notes and Provider, along with existing



NEXT Release Notes

validation, permissions and service availability.

Unscheduled Service

Resident

Donna Anderson

×

Service

Q

Activities: Reminder test

Ambulation: Cueing/Standby

Ambulation: Hoyer

Ambulation: Independent

- Save creates the service and returns the user to Care with the schedule refreshed. Cancel closes the modal without creating or changing a service and keeps the user's place on the Care screen.

Unscheduled Service

Resident

Donna Anderson

×

Service

Ambulation: Independent

×

Donna is independent of ambulation.

Reason

▼

Minutes

0

Notes

0 / 500 Remaining

Cancel

Save



NEXT Release Notes

- Access follows existing permissions; users without the appropriate permission do not see the action.
- The existing Resident record → Daily Care → Unscheduled workflow is unchanged.

What This Means

- Caregivers can document care at the point it happens, instead of leaving the Care screen, finding the resident record, and navigating back.
- Fewer interruptions to the point-of-care workflow means fewer services that never get documented — and fewer billable services lost with them.
- Because the modal reuses the existing unscheduled service workflow, there is nothing new to learn beyond where the button lives.

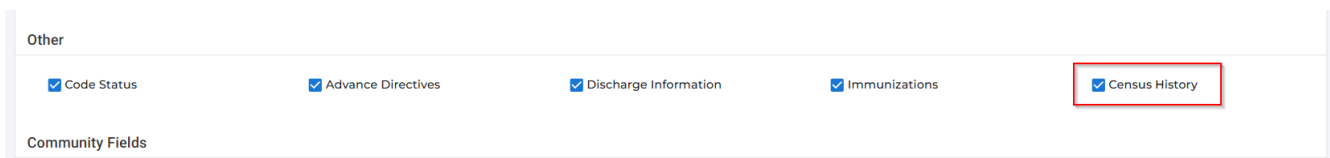
Forms: Census History on the Facesheet and Service Agreement

Census History is now an optional field on both the Facesheet and the Service Agreement, so each community can decide whether a resident's current census information appears on the forms it generates.

Navigation: Clinical → Configuration → Forms → Facesheet | Clinical → Configuration

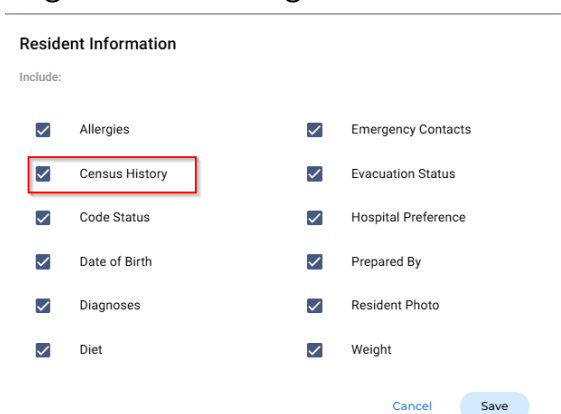
What's New

- A Census History checkbox has been added to the Other section of the Facesheet configuration, positioned with the existing fields in that section.



The screenshot shows the 'Other' section of the Facesheet configuration. It contains five checkboxes: 'Code Status', 'Advance Directives', 'Discharge Information', 'Immunizations', and 'Census History'. The 'Census History' checkbox is highlighted with a red rectangular box.

- Census History is available as a selectable field under the Include section of Resident Information in the Service Agreement configuration.



The screenshot shows the 'Resident Information' configuration form. Under the 'Include:' section, there are two columns of checkboxes. The 'Census History' checkbox in the first column is highlighted with a red rectangular box. Other checkboxes include 'Allergies', 'Emergency Contacts', 'Evacuation Status', 'Code Status', 'Hospital Preference', 'Date of Birth', 'Prepared By', 'Diagnoses', 'Resident Photo', 'Diet', and 'Weight'. At the bottom right, there are 'Cancel' and 'Save' buttons.

- Census History is unchecked by default in both places, so existing communities see no change until they choose to turn it on.
- When checked, the resident's current Census History is included on the printed Facesheet or the generated Service Agreement. When unchecked, it is not included.



NEXT Release Notes

- The selection is saved with the form configuration and persists when the configuration is reopened.
- All other Facesheet and Service Agreement configuration options continue to behave as they do today.
- On the Facesheet, Census History prints in the left column, following the existing Facesheet formatting.

 Donna Anderson Patient ID: 0101 Birthday: 07/24/1933 Sex: Female	Red-Door Home 123 Sunset Ave Willmar, MN 55653 Phone: (612) 351-5771 Fax: (612) 986-3654
Code Status: Resuscitate Living Directives: Full code - call 911, Living will on file	Personal Contacts Myriah Kern: Daughter, Conservator of Estate (CE), Responsible Party / Bill to (RP) Emergency Contact 158 e shore, apt 12, Jamestown, NY 87456, Becker Personal Email: myriah.kern@gmail.com Mobile Phone: (701) 896-6532 Preferred Work Phone: (701) 425-9636 Home Phone: (701) 842-6396 Mobile Phone: (612) 351-5771 Sarah Bemert: Other, Responsible Party / Bill to (RP) Personal Email: sbemert@eldermark.com Work Phone: (966) 896-9865 Preferred
Demographics Veteran Status: Army Admitted from home: No Previous Occupation: Accountant Home Phone: (789) 789-7889 Email: mkern@eldermark.com Race: White Start of Care: 05/08/2025 Religion: Affiliation - Catholic Organization - St. Johns Birthplace: Fargo Religion: Catholic Preferred Name: Dove Marital Status: Married Maiden Name: Hoven Date of current readmission: 02/01/2024	Medical Contacts Primary Care Provider: Greg Stompro - Allergists/Immunologists U PIN: 856326 - NPI: 5315324 Organization: Sanford - 2528 Main Ave West, West Fargo, ND 58078, United States Alternate Care Provider: Susan Dickinson - Cardiologists Organization: Sanford - 2528 Main Ave West, West Fargo, ND 58078, United States Hospital: Sanford - 30717 Victory Rd, Vermillion, SD 57069, United States - (605) 670-9753 Transportation preference: Uber - (605) 670-9753 Ambulance preference: Fargo Ambulance - (612) 351-5771 Funeral Home: Sunset Funeral Homes - 606 Gilead AveTest, Vermillion, SD 57069, United States - (605) 670-9753
Census History AL Start: 09/22/2026	Billing Responsible Party: Kern Myriah, Bemert Sarah Medicaid #: mdd468546 SSN: 321-56-5123

- On the Service Agreement, Census History appears in the existing Resident Information section.

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Service Agreement  Donna Jeanne "Dove" Anderson Unit: 01 Birthday: 07/24/1933 Sex: F		Red-Door House 123 Sunset Ave Willmar, NJ 08963 Phone: (612) 351-5711 Fax: (612) 986-3654
Code Status: Resuscitate Evacuation Status Bed Bound - Unable to self ambulate., Evacuate Pet Diet No Added Sugar Census History AL Start: 09/22/2026 Hospital Preference Sanford 30717 University Rd, Vermillion, SD 57069, United States Phone: (605) 670-9753 Prepared By Myriah Kern, RN	Personal Contacts Myriah Kern: Daughter, Emergency 158 e shore, apt 12, Jamestown, NY 87456, Becker Mobile Phone: (701) 896-6532 Preferred Work Phone: (701) 425-9636 Home Phone: (701) 842-6396 Mobile Phone: (612) 351-5711 Medical Information Weight: 120 lbs Allergies: Ace Inhibitors• Milk Diagnoses: Abdominal actinomycosis (A42.1), Abnormal serum enzyme levels (R74)	

- Only the resident's current active Census History record is shown. Historical and inactive records are ignored.
- Where a resident has no Census History records, or has records but none currently active, Census History is omitted from the printed form.

NEXT Release Notes

What This Means

- Communities that need census information on resident paperwork can include it directly, rather than adding it by hand after printing or maintaining a separate form.
- Because the field is off by default, communities that don't want census details on these forms are unaffected by the change.

Health Insurance: Status Field Removed

The Status field has been removed from a resident's Health Insurance record. An insurance record is now either kept or deleted, rather than kept and marked Disabled.

Navigation: Resident Profile → Profile → Insurance → Health

What's New

- The Status field no longer appears on the Health insurance card or in the Health insurance add/edit modal, and the layout closes up where the field used to sit.
- All other Health insurance fields are unchanged, and Save, Cancel and Delete continue to behave as they do today.

Health

The screenshot shows a form titled "Health". It contains three input fields: "Provider" with the value "BCBS", "Policy #" with the value "p65413", and "Group #" with the value "g4798465". Below the fields are three buttons: "Delete" (red text), "Cancel" (blue text), and "Save" (blue button).

- Health insurance records that were set to Disabled were removed during deployment and no longer appear in the resident's Insurance listing.
- Health insurance records that were set to Enabled are unaffected.

What This Means

- An insurance record that no longer applies is deleted rather than left on the resident in a disabled state, so the Insurance listing reflects only coverage that is currently relevant.
- Communities that used Disabled to retain a record of prior coverage should be aware those records are no longer visible in the resident profile.
- This also resolves the error that occurred when saving a Health insurance record with Status set to Disabled.



NEXT Release Notes

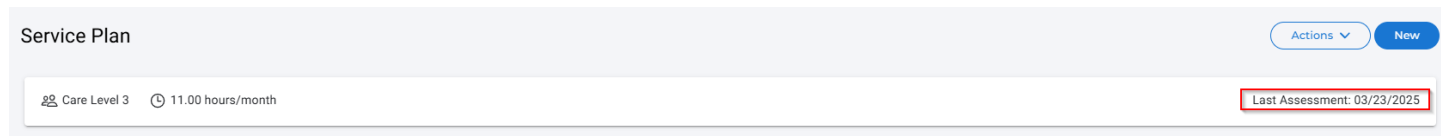
Services Tab: Last Assessed Date Shows the Completed Date

The Last Assessed date on a resident's Services tab now consistently shows the date the evaluation was completed, rather than changing as the evaluation is signed and finalized.

Navigation: Clinical → Residents → select resident → Services → Service Plan

What's New

- Last Assessed displays the evaluation's Completed date.



The screenshot shows a 'Service Plan' header with 'Actions' and 'New' buttons. Below the header, a bar displays 'Care Level 3' and '11.00 hours/month'. On the right side of this bar, a red-bordered box highlights the text 'Last Assessment: 03/23/2025'.

- Previously, the date shifted as the evaluation moved through its workflow — showing the completed date at first, then the signed date once the evaluation was signed, then the finalized date once it was finalized.
- Signing and finalizing an evaluation no longer changes the Last Assessed date.

What This Means

- Last Assessed reflects when the resident was actually assessed, rather than when the paperwork was signed off, which can be days later.
- Checking when a resident was last assessed gives a consistent answer regardless of where the evaluation sits in its sign and finalize workflow.

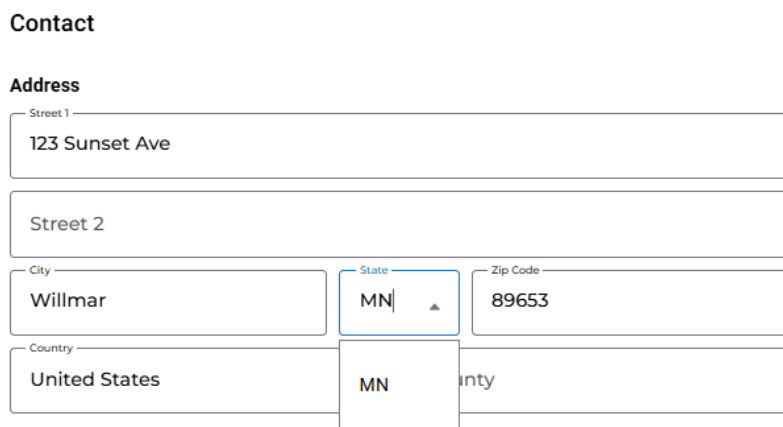
State Fields: Type an Abbreviation to Select

State fields now accept a typed two-letter abbreviation and select the matching state automatically, rather than requiring users to scroll the full list.

Navigation: Resident record → Profile → Demographics → Resident Contact | Resident record → Profile → Contacts → Contact → Address | Community → Settings → Lists

What's New

- Typing a state abbreviation in a State field selects the matching state. Matching is case-insensitive, so MN, Mn and mn all match MN.



The screenshot shows a 'Contact' form with an 'Address' section. It includes fields for 'Street 1' (123 Sunset Ave), 'Street 2', 'City' (Willmar), 'State' (MN), 'Zip Code' (89653), 'Country' (United States), and a dropdown for 'County' (MN). The 'State' field is highlighted with a blue border, and a dropdown menu is visible below it showing 'MN' as the selected option.



NEXT Release Notes

- Opening the dropdown and selecting a state with a mouse, touch or keyboard continues to work exactly as before.
- Only a valid state from the existing list can be saved. An abbreviation that doesn't match is not saved as a state value, and existing field validation is unchanged.

What This Means

- Entering an address takes a couple of keystrokes rather than scrolling a fifty-item list, which adds up across contact, provider and agency records.
- Because the behavior is the same everywhere a State field appears in these areas, there is no need to remember which screens support typing and which don't.

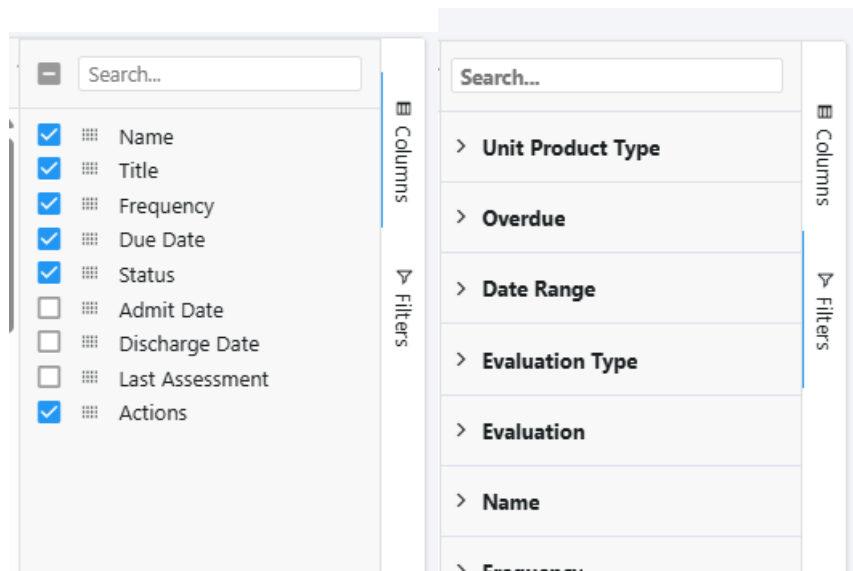
Evaluation Due Report: One Panel for Filters and Columns

Filtering and column management on the Evaluation Due Report now live in a single side panel, replacing the two separate filter controls the report carried out before.

Navigation: Clinical → Reports → Evaluation Due Report

What's New

- The side panel on the right of the report now holds both Filters and Columns, replacing the separate filter icon and drawer.



- All existing filter options carry over — Unit Product Type, Overdue, Date Range, Evaluation Type and Evaluation — and behave as they did before.
- Columns can be shown and hidden from the side panel. Choose Columns remains available from the column header menu, and Reset Columns restores the default set: Name, Title, Frequency, Due Date, Status and Actions.
- Sorting, pagination, resizing, and pinning are unchanged.

What This Means

- There is one place to customize the report, rather than two filter controls that did different things.



NEXT Release Notes

- The optional Admission Date, Discharge Date, and Date of Last Evaluation columns added in a previous release can now be turned on from the same panel used for filtering, instead of a right-click menu.

Resident Notes Report: New Default Date Range and Sort

The Resident Notes Report now opens showing the last 30 days with the most recent notes first, so the notes a user is most likely to need are on screen without adjusting the report.

Navigation: Clinical → Reports → Resident Notes Report

What's New

- The date filter now defaults to the last 30 days.
- The default sort now shows the most recent notes first.
- Both defaults can still be changed. Adjusting the date range or the sort works exactly as it does today.

Resident Notes by Date

Encounter Date

Last 30 days including today (09/09/2026 – 10...

Resident Name

Select values

Note Type

Select values

Created By

Select values

Resident Notes by Date

	Encounter Date	Encounter Time	Resident Name	Unit	Note Type	Note Details	Created By
	10/07/2026	01:23 PM	Anderson, Arnold Gordon	06	Medication Event	On 10/07/2026 at 01:21 PM, a incorrect dosage involving resident Arnold Anderson occurred. Vital signs at the time included Blood Pressure: 120/88 mmHg, Heart Rate: 74 bpm, Respiration Rate: 17 breaths/min, Oxygen Saturation: 99 %, Temperature: 97.6 °F. The medication involved was y. This event was classified as Serious Incident. Observations made regarding the resident were: y. Instructions received post-incident were: j. Immediate actions taken for the resident included: j.	Toy, Sierra
	09/24/2026	11:42 AM	Bloomington, Brandon Thomas	21	Resident Event	On 09/24/2026 at 11:40 AM, a Self reported fall involving resident Brandon Bloomington occurred. Vital signs at the time included Blood Pressure: 120/80 mmHg, Heart Rate: 85 bpm, Respiration Rate: 85 breaths/min, Oxygen Saturation: 85 %, Temperature: 85.0 °F, Pain Level: 0/10. This event wasn't classified as Serious Incident. At the time of the incident, it was observed and heard that f. There were not apparent or suspected injuries. Immediate response to the incident included: f. The resident didn't receive first aid or medical care following the incident.	Bement - UAT BA, Sarah

What This Means

- The report opens on recent activity rather than the full note history, so there is less to scroll through before reaching what matters.
- Users who need older notes can widen the date range as before — nothing has been removed, only the starting view has changed.

Reports: Hyperlinks into the Resident Chart

Reports: Hyperlinks into the Resident Chart

Hyperlinks into the resident chart are now available on the Code Status Report, Diet Report, Basic Resident Roster and Emergency Contact Roster, so a value opens in the part of the chart where it is maintained.

Navigation: Clinical → Reports → Code Status Report | Diet Report | Basic Resident Roster | Emergency Contact Roster

What's New

- On the Code Status Report and the Diet Report, Resident Name links to the resident's demographic profile.
- Code Status, Diet, Likes and Dislikes link to Accommodations.
- Allergies links to Medical → History → Allergies.



NEXT Release Notes

- On the Basic Resident Roster, Resident Name links to the resident's demographic profile.
- On the Emergency Contact Roster, Resident Name links to the resident's demographic profile and Contact Name links to the resident's Contacts.
- Double-clicking a blank cell opens the corresponding blank area of the resident's record, so missing information can be added without leaving the report to look the resident up.
- All other report behavior is unchanged — filtering, sorting and printing work as they do today.

Diets			
Diets			
Resident Name	Unit	Diets	Food Allergies
Anderson, Donna Jeanne	01	No Added Sugar	Milk
Bennette, Bonita Leigh	25	Thickened Liquids, Dairy Free, Consistent Carb	Milk, Peanuts
Bergstrom, Emmerson Karen	14-B	Dairy Free, No Added Sugar	
Blackhart, Hudson	19	Dairy Free, Consistent Carb, Diabetic	

What This Means

- Staff reviewing a report can move straight to the right place in the resident chart — the profile, Accommodations, Allergies or Contacts — instead of noting the name and navigating there separately.
- Working through a list of residents takes fewer steps, which adds up when a report surfaces several records to follow up on.
- Because blank cells are clickable too, a report can be used to audit gaps — residents missing a code status, diet or allergy record — and fill them in.

Clinical Fixes

This release includes fixes across the resident chart, housing, Service Plan calculations, scheduling and printing, and password entry to improve accuracy and consistency in Clinical.

What's Fixed

- Resolved an issue where the Level of Care on a resident's Service Plan tab did not update after a newer evaluation was finalized, so it continued to show the earlier care level and assessment date while the Medical and Evaluations tabs showed the current one. The Service Plan tab now reflects the most recently finalized evaluation.
- Resolved an issue on the resident Housing Occupancy tab where selecting New before the current occupancy record finished loading opened the New Unit modal rather than the Transfer modal, leaving a record that could not be saved.
- Resolved an issue where the Care Level card on the resident chart displayed the evaluation version name instead of the evaluation name, which caused "(Copy)" to appear on the resident record each time an evaluation version was cloned. The resident record now shows the parent Evaluation Name. "Copy" still displays where it is genuinely part of the Evaluation Name, and version history, version names, notes and version numbers in Configuration are unchanged.



NEXT Release Notes

- Resolved an issue where the monthly minute and hour totals on the printed Service Plan counted a daily service only once per day, regardless of how many times a day it was scheduled. Services scheduled for more than one interval or interval time are now counted at their full frequency.
- Resolved an issue where an overnight shift displayed a missed-services indicator even though no services had been missed. The indicator was being triggered by PRN template records that had no status recorded.
- Resolved an issue where printing from Schedule displayed the previous day's date instead of the current date.
- Resolved an issue where the Employee field in the View Service modal was not marked as required, even though a service could not be saved without it. The field is now shown as required on both the Active and Past tabs.
- Resolved an issue where certain special characters — including ` ~ [{] } ; : ' " , < > / ? — did not satisfy the special character requirement when setting a password, even though a password containing them could be saved.

Risk Management

List Screens: Risk Management and Incidents

The listing screen improvements delivered across Clinical in the previous release now extend to Risk Management and Incidents, bringing the same loading behavior and taller lists to those screens.

Navigation: Risk Management → Configuration → Notification Recipients | Risk Management → Incidents

What's New

- The updated list experience now applies to the Risk Management Forms listing, the State Forms listing, the Notification Recipients listing, and the Incident listing.
- While a list is loading, a placeholder appears in the shape of the list's columns instead of a blank screen.
- Lists extend to the bottom of the browser window, so more records fit on screen.
- Loading behavior and styling match the listing screens updated in the previous release, so the experience is the same whether a user is working in Clinical or in Risk Management.
- Existing filtering, sorting, exports, permissions and drill-down workflows continue to work as they do today, as do empty states and error message



NEXT Release Notes

Incidents					New
Search					
☐	Date	Name	Event	Serious Incident	
☐	10/07/26	Bergstrom, Emmerson	Resident Event		
☐	10/07/26	Anderson, Arnold	Incorrect dosage	✓	
☐	09/30/26	Anderson, Arnold	Resident Event		
☐	09/24/26	Bloomington, Brandon	Self reported fall		
☐	08/23/26	Anderson, Arnold	Suspected verbal abuse		
☐	08/24/26	Jones, Oscar	Observed fall	✓	
☐	06/16/26	Warren, Rose	Self reported fall		

What This Means

- Staff working in these screens get immediate feedback that a list is loading, rather than looking at an empty screen during time-sensitive work.
- Taller lists mean fewer records hidden below the fold when reviewing incidents or form configurations.
- With Risk Management now included, the list experience is consistent across the areas a user moves between in a single session.

Integration

Integrator API: Community Data in Community Endpoints

The community endpoints now return a community's address, phone, timezone and unit of measure, so integrated systems can align their own settings and match communities without a separate lookup.

What's included:

- GET Community by Org ID and GET Community by ID both return the additional community data.
- Community Address is returned as a structured object with separate Street1, Street2, City, State/Province, Postal Code and Country fields, rather than a single line of text.
- Community Phone.
- Community Timezone.
- Community Unit of Measure.

What This Means

- Integrators can align time zone settings to the community's own timezone, rather than inferring it or configuring it by hand for each community.
- Address and phone give integrators additional data points to match communities between systems when the names don't line up.
- Unit of measure lets connected systems match the community's configuration instead of assuming a default.



NEXT Release Notes

Integrator API: Post an Unscheduled Service for a Resident

A new endpoint lets integrated systems record an unscheduled care service that was delivered to a resident, so care documented in a third-party system appears alongside the resident's other care records in Eldermark NEXT.

What's included:

- A new POST endpoint creates an Unscheduled Service for a resident.
- Assignment and Service must match existing enabled configuration values, which integrators retrieve first using the existing GET endpoints. Values that don't exist, are disabled, or carry an Unscheduled exception are rejected.
- A service can be identified by Service ID or Service Name. Where a Service ID is supplied it is used for validation; where it is omitted, the request falls back to the Service Name.
- Required fields are Assignment, Service, Actual Date and Time, Actual Minutes, and Reason. Actual Minutes must be greater than zero.
- Reason accepts Resident Requested or Other. Notes are required when Reason is Other, and optional otherwise.
- Services configured with additional data points, such as vitals, accept those values in the request and update the resident's record accordingly.
- Every service created through the endpoint receives Status = Review automatically. A status submitted in the request is ignored.
- Clear validation errors are returned for an unknown resident, an invalid or disabled Assignment or Service, a Service that doesn't allow unscheduled entry, missing required fields, an unsupported Reason, or missing Notes when Reason is Other.
- The endpoint creates unscheduled services only. It does not create, modify or delete scheduled care.

What This Means

- Care delivered and documented in a connected system is recorded in Eldermark NEXT rather than re-entered by staff from another screen.
- Because every entry lands in Review status, nothing posted through the API bypasses the review staff already perform on unscheduled services.
- Requiring configured Service and Assignment values keeps integrator-created records consistent with the community's own setup, rather than introducing values no one recognizes.
- Referencing a service by its unique ID avoids ambiguity where a community has more than one service with the same name.



NEXT Release Notes

Integrator API: Additional Data in the Resident Census Domain

The Census domain of the GET Resident response now returns a resident's current Census Type and whether they are the primary or secondary resident in their unit, so connected systems can see both without a separate lookup.

What's included:

- Census Type and Census Type Start Date are returned in the Census domain of the GET Resident response.
- Only the resident's current active census type is returned. Historical values and census types that have an end date are excluded.
- Where a resident has no active census type, the values return as null.
- A secondary indicator identifies the resident's position in the unit: true where the resident is a secondary occupant and another resident is primary on that unit, false where the resident is the primary.

What This Means

- Connected systems can act on a resident's current census classification — for routing, reporting or eligibility — rather than inferring it from other resident data.
- Because only active values are returned, integrators receive the resident's present classification without having to filter historical census records themselves.
- Secondary residents sharing a unit with a primary resident can be identified directly, rather than inferred by matching unit numbers across resident records.

Integrator API: Webhook Trigger for a Created Resident

A webhook now fires when a new resident profile is created, so integrated systems learn about a new resident as it happens rather than discovering the record on their next scheduled pull.

What's included:

- Creating a new resident profile triggers a webhook notification.
- The notification is sent under the existing resident basic domain subscription, so integrators already subscribed to that domain receive it without additional setup.

What This Means

- Connected systems can pick up a new resident at the point the profile is created, rather than waiting for a reconciliation or nightly sync to surface it.
- Because the trigger uses the existing resident basic domain subscription, integrators receive it without changing their subscription configuration.

Integrator API: Brand ID in the Organization Endpoints

The organization endpoints now return the Brand ID, giving integrators the identifier they need to set up a subscription at the brand level.

What's included:



NEXT Release Notes

- Brand ID is returned in the response for both the organization list and the single organization endpoints.

What This Means

- Integrators who want a subscription covering an entire brand can retrieve the Brand ID directly, rather than requesting it from Eldermark.
- Existing organization-level integrations are unaffected; the response simply carries one additional identifier.

Integrator API: Residents Ready for Evaluation

The GET Residents endpoint can now return CRM prospects who are ready for evaluation, allowing integrated systems to support pre-admission workflows before the prospect is converted to an admitted resident.

What's included:

- A new residentStatus=PROSPECT_READY_FOR_EVAL option returns prospects who are currently marked Ready for Evaluation and have not been marked lost.
- The results include only non-deleted prospects that have an associated resident record. Prospects that are not ready for evaluation or have been marked lost are excluded.
- residentStatus=ALL now includes admitted and other non-prospect residents together with prospects who are currently ready for evaluation.
- The default Resident Status behavior and residentStatus=ADMITTED continue to exclude prospect residents.
- The response uses the same structure, pagination and optional data domains as the existing GET Residents endpoint.
- Because these individuals have not yet been admitted, Census and Unit History data return empty when those domains are requested.

What This Means

- Integrators can retrieve residents who are completing pre-admission paperwork or assessments before admission, rather than waiting until they are converted to admitted residents.
- The filter returns the current ready-for-evaluation population rather than every historical record where the resident was originally created as a prospect.
- Existing integrations that use the default or ADMITTED status continue to receive admitted residents without prospect records being added to their results.
- Integrations using residentStatus=ALL should account for the newly included ready-for-evaluation population.

New Pharmacy Integration: PrimeRX

PrimeRX is now available as an integrated pharmacy partner for Eldermark NEXT, sending medication orders directly into eMAR.



NEXT Release Notes

What's New

- Communities working with PrimeRX can receive medication orders and profile updates directly in Eldermark NEXT, without manual entry.
- PrimeRX joins the 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 PrimeRX 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 PrimeRX can keep their existing pharmacy relationship rather than switching providers to gain integration.

