I/DD June Lunch(ish) and Learn

June 24, 2026

speakers

Kim Barboza, Product Owner and Technology Manager

How long have you been with HHA? *8 years*

Favorite part of the software? *Configuring requirements*

What do you do in your free time? *Volunteer with Toledo TOPSoccer, a program that adapts the game of soccer for those with diverse abilities.*

Olivia Karem, Implementation Specialist

How long have you been with HHA? *7 years*

Favorite part of the software? *Configuring security*

What do you do in your free time? *Take care of my fur babies Tilly and Otto and Knitting.*

agenda

- Client Care Service Plans
- Employee Care Applicant Tracking
- Release Updates
  - Time Tracking Edit Notification
  - Mileage Reminder for Time Tracking Setup

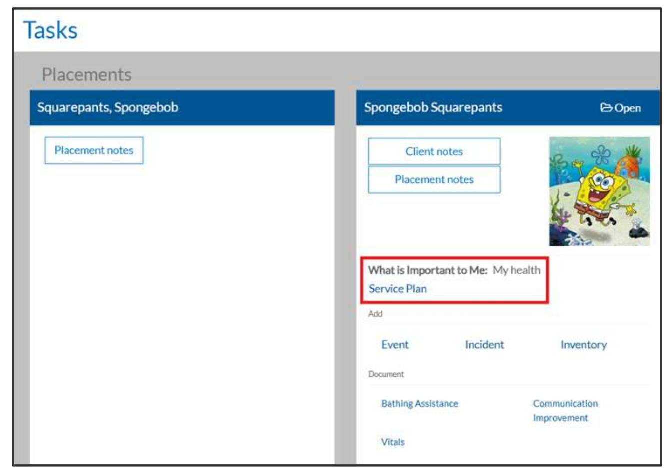
Overview

Service Plan Overview

What are Service Plans

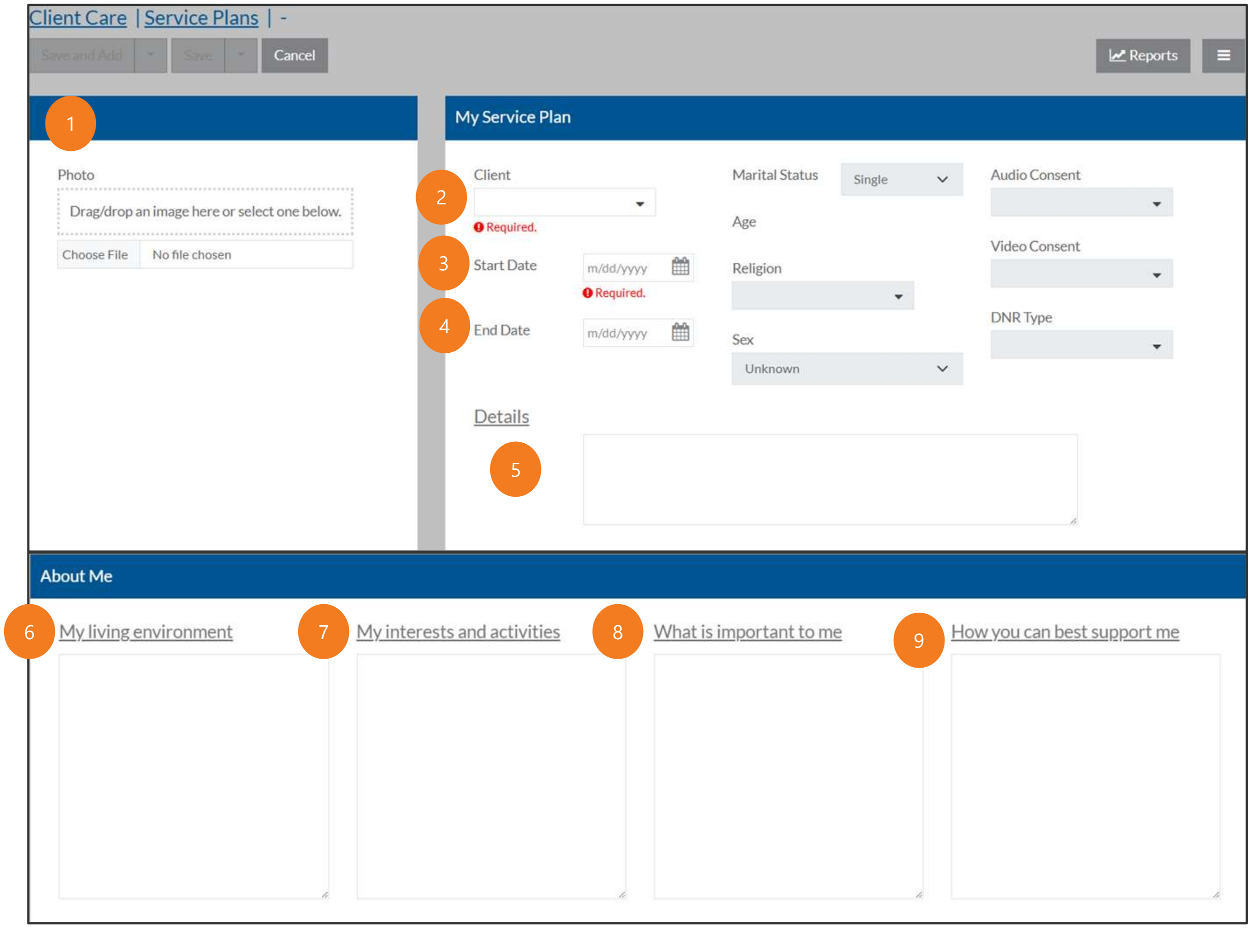
The **Service Plan** gives agencies and caregivers a single view of that plan (encompassing Program Plans, Collection Plans and Contract Details in one place) along with pertinent client information, so they no longer must piece it together. In addition, they can quickly see what's important to the client and open the service plan directly from the Task dashboard.

Service Plans can be found under **Client Care > Service Plans,** or on the Task Dashboard on the client's card.



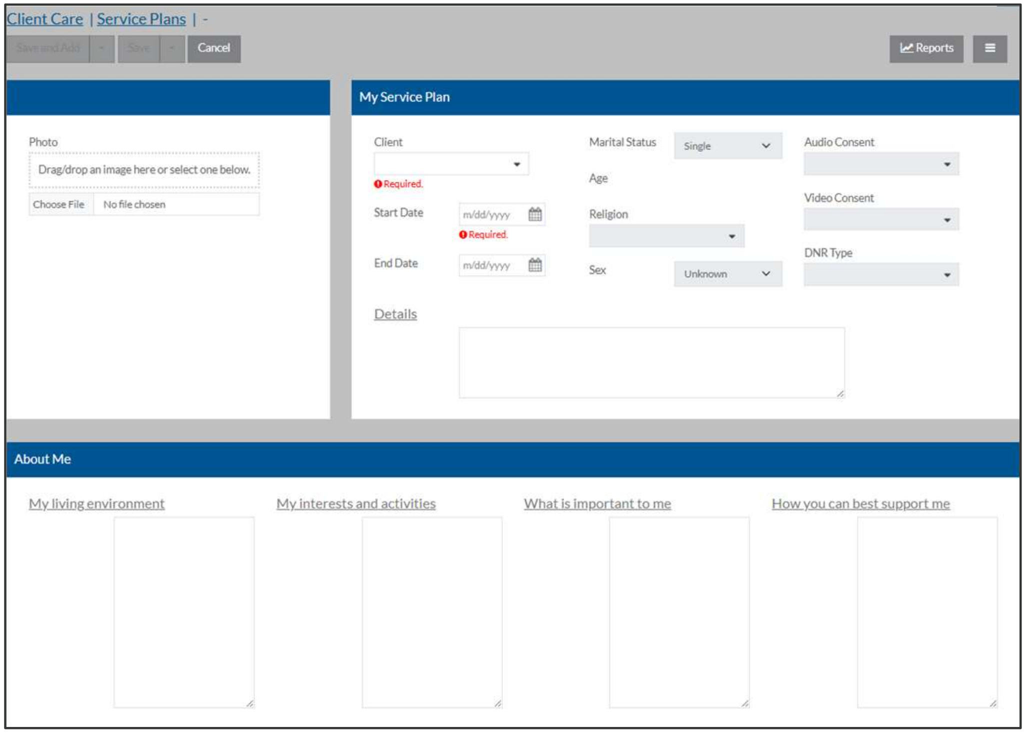
Service Plan Overview

1. **Photo –** A photograph of the client. The photo from the client record will appear when you select the Client below.
2. **Client –** The client the service plan is for. Once you select the client, the Marital Status, Religion, Sex, Audio Consent, Video Consent and DNR Type will appear from the client record.
3. **Start Date –** The date the service plan goes into effect. After you enter a Start Date, the client's age at the start of this plan appear.
4. **End Date –** The date the service plan ends. You can leave it blank if it is still in progress.
5. **Details –** Any details about the service plan or client that you want to include.
6. **My living environment -** Information about where the client lives and who they live with.
7. **My interest and activities -** The activities and interests that the client is interested in or participating in.
8. **What is important to me -** Information about what is important to this client. This information will also appear on the client's card in the Task dashboard.
9. **How you can best support me -** Information what direct care staff can do to best support this client. This information will also appear on the client's card in the Task dashboard.



Adding a Service Plan

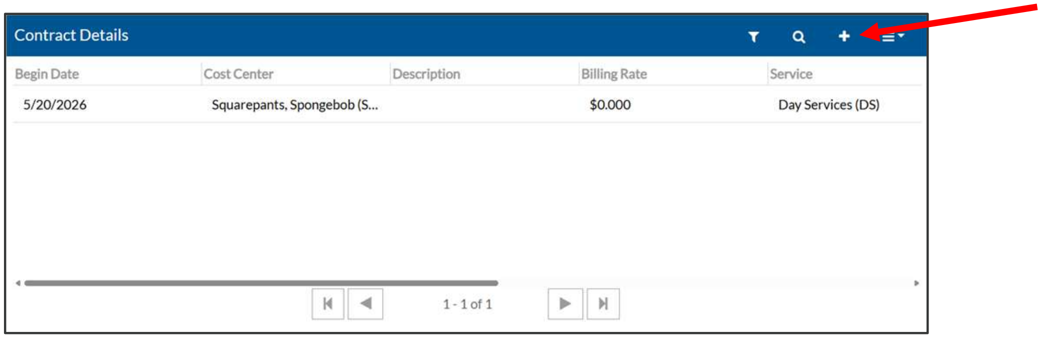
- Go to Client Care > Service Plans. Click the **+** to add a new Service Plan (or click on an existing plan to edit).
- Complete the Service Plan Information.
- Click **Save** (or **Save and Add**).
- Once the Service Plan is saved, sections for the **Contract Details, Program Plan Objectives,** and **Miscellaneous Data Collection Plans** will appear.*



*Will review in detail on later slides

Adding Contract Details to a Service Plan

- Contract Details can be linked to a Service Plan in the **Contract Details** section. To add, click the **+** in the top right corner.



- There are three options to add a Contract Detail to a Service Plan:

Adding Contract Details to a Service Plan

Add Existing Client Contract Detail

Select if an existing Client Contract Detail needs to be linked to the Service Plan.

Add a new Client Contract Detail to an Existing Client Contract ID

Select if you want to add a new Client Contract Detail to an existing Client Contract to link to the Service Plan.

Add a New Client Contract Detail to a new Client Contract ID

Select if you want to add a new Client Contract Detail to a new Client Contract. The new Contract Detail will then be linked to the Service Plan.

Adding a Program Plan Objective to a Service Plan

- Program Plan Objectives can be linked to a Service Plan within the Service Plan in the **Program Plan Objectives** section. To add, click the **+** in the top right corner.

Program Plan Objectives

Objective	Collection Type	Start Date	End Date	Result Picklist
Spongebob needs assistanc...	Unscheduled Only	5/20/2026		Results: Collected/Refused: Show Notes
Spongebob needs to be abl...	Unscheduled Only	5/20/2026		Results: Completed/Ref/NA: Show Notes

- There are three options to add a Program Plan Objective to a Service Plan:

Reverse Reference Add History Resize

- Add Existing Program Plan Objective
- Add a new Program Plan Objective to an existing Program Plan
- Add a new Program Plan Objective to a new Program Plan

Adding a Program Plan Objective to a Service Plan

Add Existing Program Plan Objective

Select if an existing Program Plan Objective needs to be linked to the Service Plan.

Add a new Program Plan Objective to an existing Program Plan

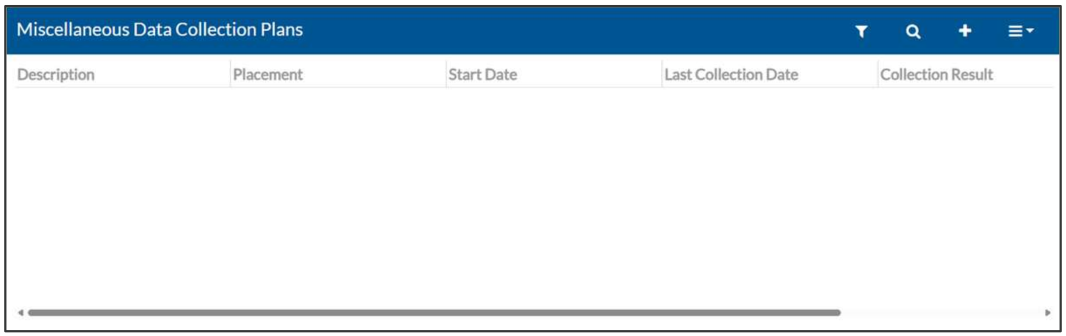
Select if you want to add a new Program Plan Objective to an existing Program Plan to link to the Service Plan.

Add a new Program Plan Objective to a new Program Plan

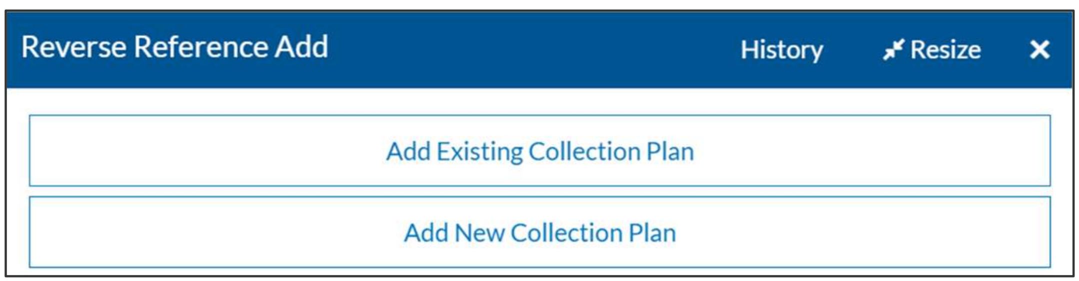
Select if you want to add a new Program Plan Objective to a new Program Plan. The new Program Plan Objective will then be linked to the Service Plan.

Adding a Miscellaneous Data Collection Plan to a Service Plan

- Miscellaneous Data Collection Plans can be linked to a Service Plan within the Service Plan in the **Miscellaneous Data Collection Plans** section. To add, click the **+** in the top right corner.



- There are two options to add a Miscellaneous Data Collection Plan to a Service Plan:



Adding a Miscellaneous Data Collection Plan to a Service Plan

Add Existing Collection Plan

Select to add an existing Miscellaneous Data Collection Plan to the Service Plan.

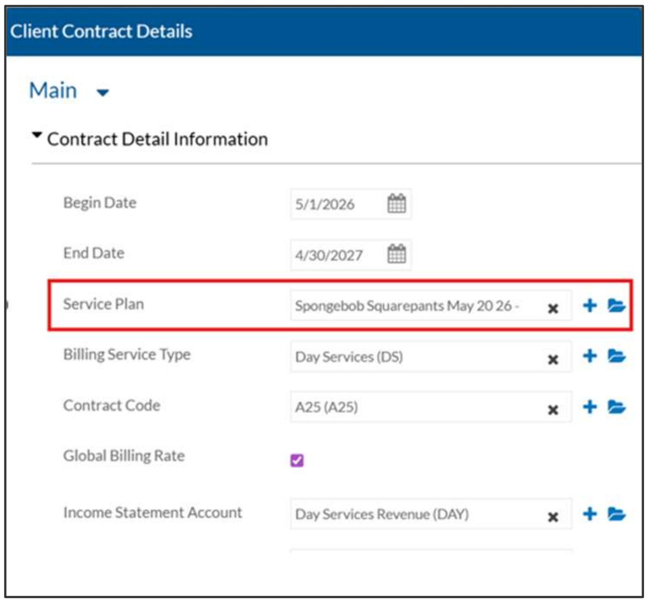
Add New Collection Plan

Select if you want to add a new Miscellaneous Data Collection Plan to link to the Service Plan.

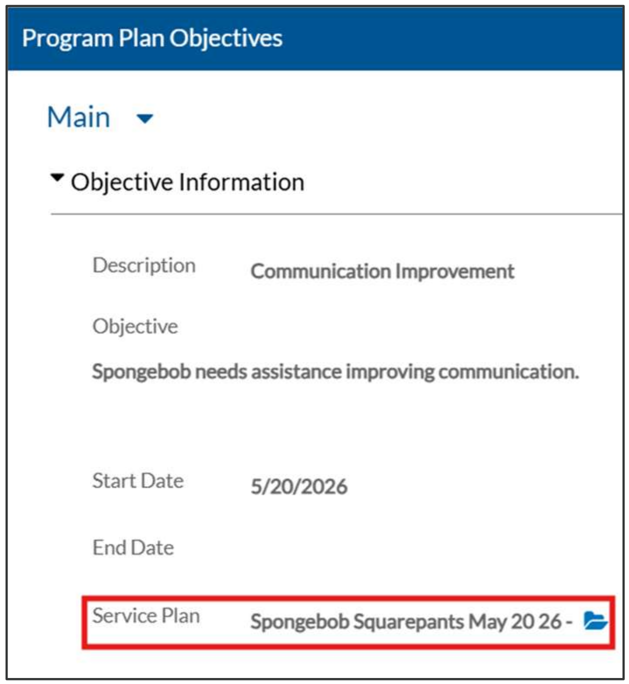
Adding a Service Plan to Contract Details, Program Plan Objectives, and Miscellaneous Data Collection Plans

You can also add a previously created **Service Plan** to Contract Details, Program Plan Objectives, and Miscellaneous Data Collection Plans through the items themselves.

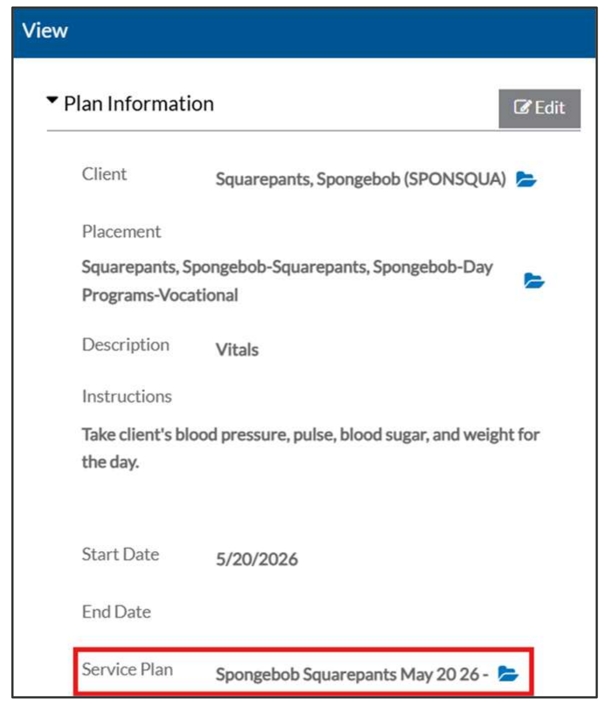
Contract Details:



Program Plan Objective:



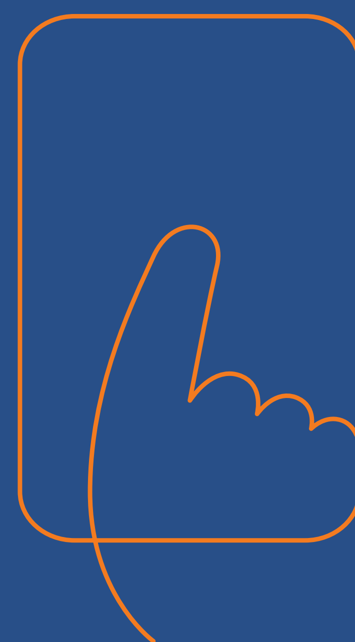
Misc. Data Collection Plan:



A Closer Look Inside the Platform

- ✓ Service Plan Overview
- ✓ Adding Contracts, Program Plan Objectives, and Miscellaneous Data Collections to Service Plans
- ✓ Updating Service Plans within Contracts, Program Plan Objectives, and Miscellaneous Data Collection Plans

Now, we'll jump into the system and highlight the key visuals — including the actual pages and fields.

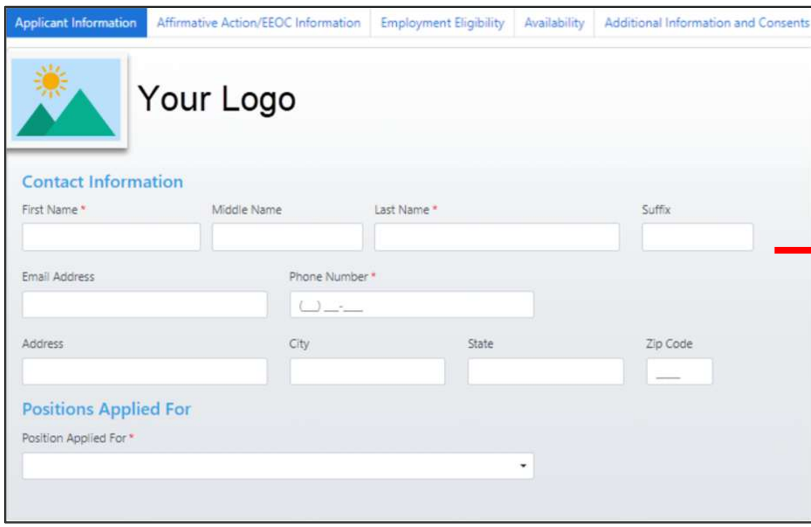


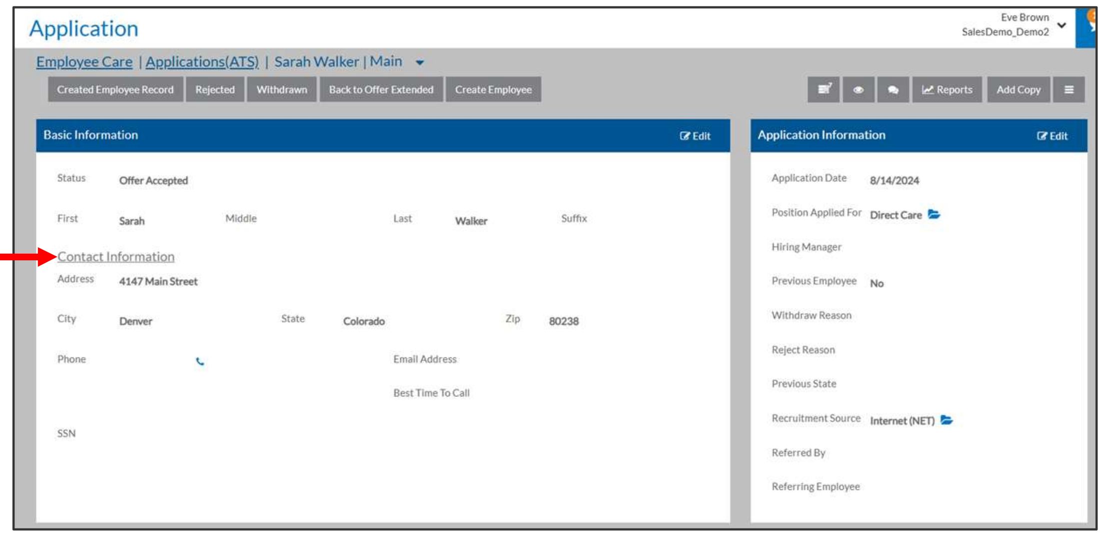
Applicant
Tracking

Applicant Tracking

What is Applicant Tracking?

Allows you to have an external Form.io powered web application that applicants can complete without having to log into DataPlus. Once the applicant completes the web application it is automatically available to you in Employee Care via the **Application Tracking** screen.





What is Applicant Tracking?

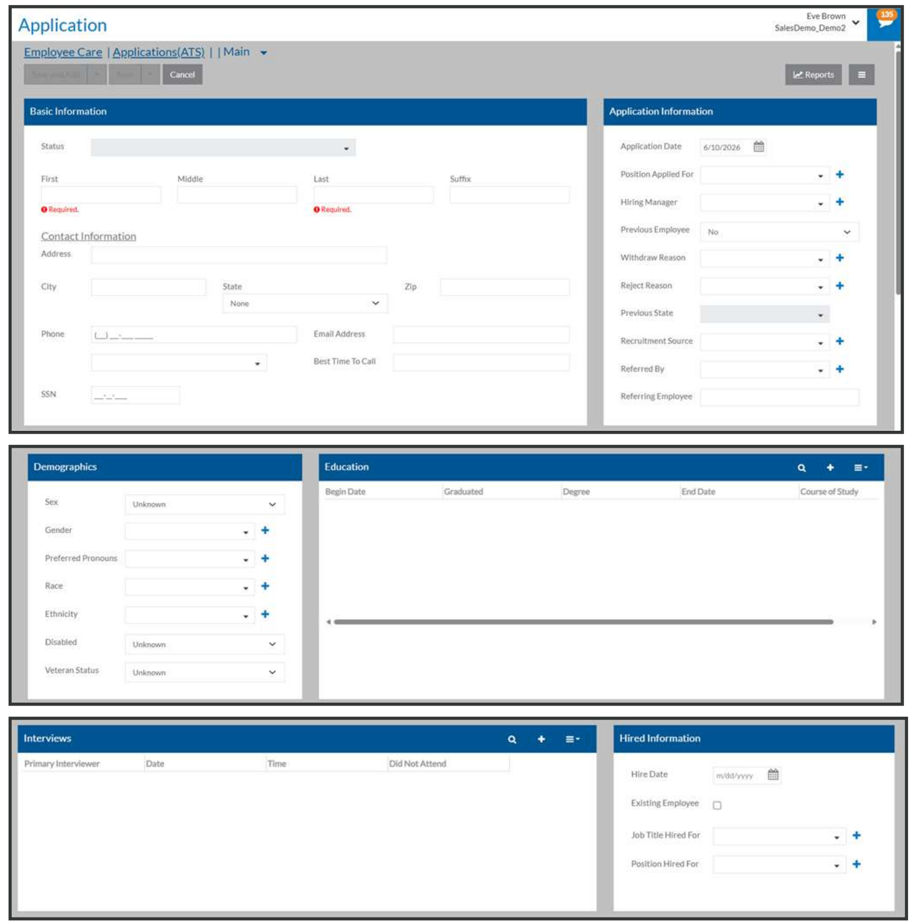
Because Applicant Tracking is a workflow, you can then:

- Route the application to the hiring manager when changing statuses via tasks.
- Run a report to determine where in the process the applicant was rejected or withdrew by including the previous state.
- See immediately how many applications are in a particular status.
- View the application history.
- Some additional features of the Applicant Tracking System include the ability to:
  - Tie a requirement to an application (such as Background Check or a Drug Screen).
  - Create an Employee from a hired applicant.

Application Overview in DataPlus

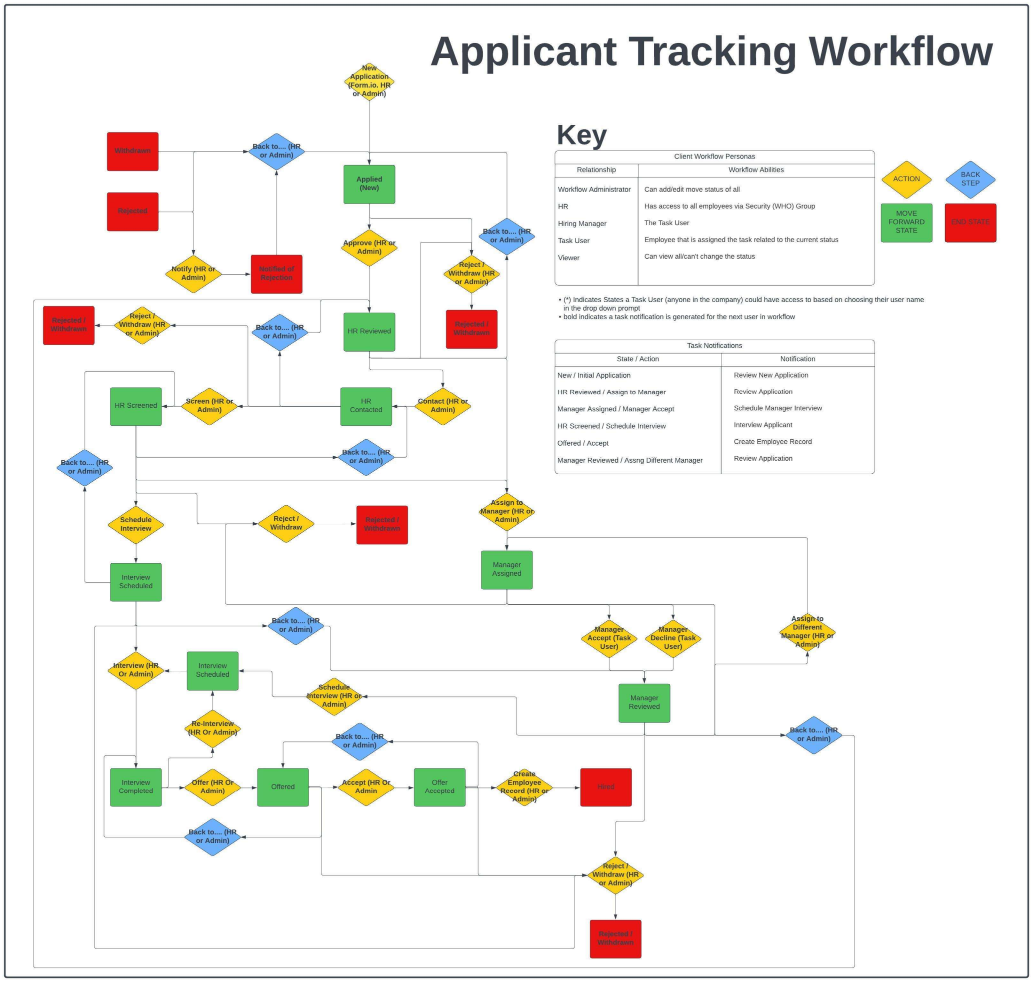
You will see information about the application that you can complete or that was automatically filled from the web application the applicant completed.

- **Basic Information**
- **Application Information**
- **Demographics**
- **Education**
- **Interviews***
- **Hired Information***



*These items are not populated from the applicant's application but are for internal use.

Applicant Tracking Workflow

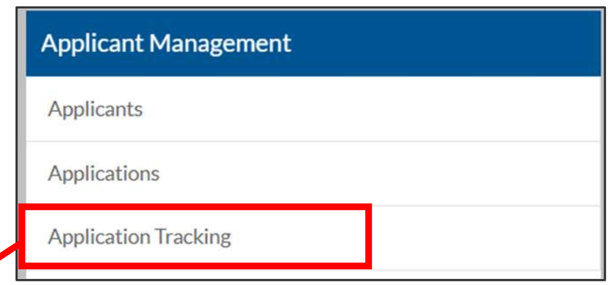


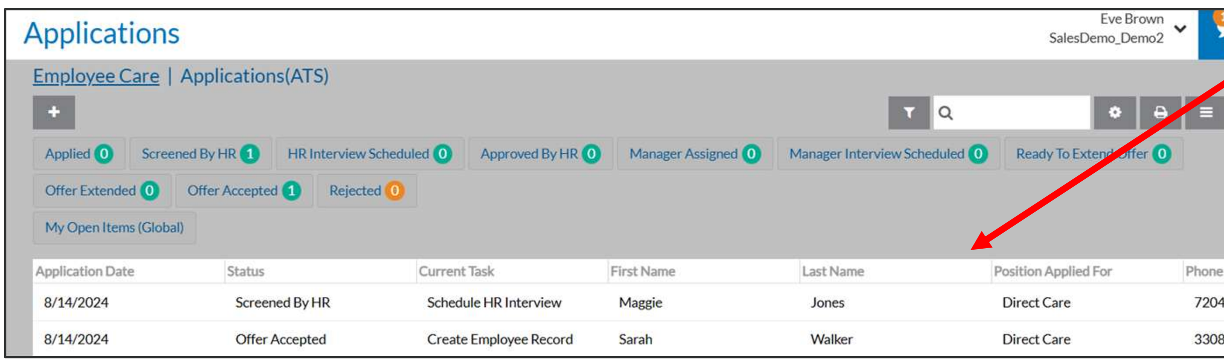
Managing Applications

Once an applicant completes the web application and it appears as an Application in Applicant Tracking, you can then review, manage, and change statuses of the application.

To manage applications, go to **Employee Care > Application Tracking** from the **Applicant Management Card.**

Once there, the application grid will appear.

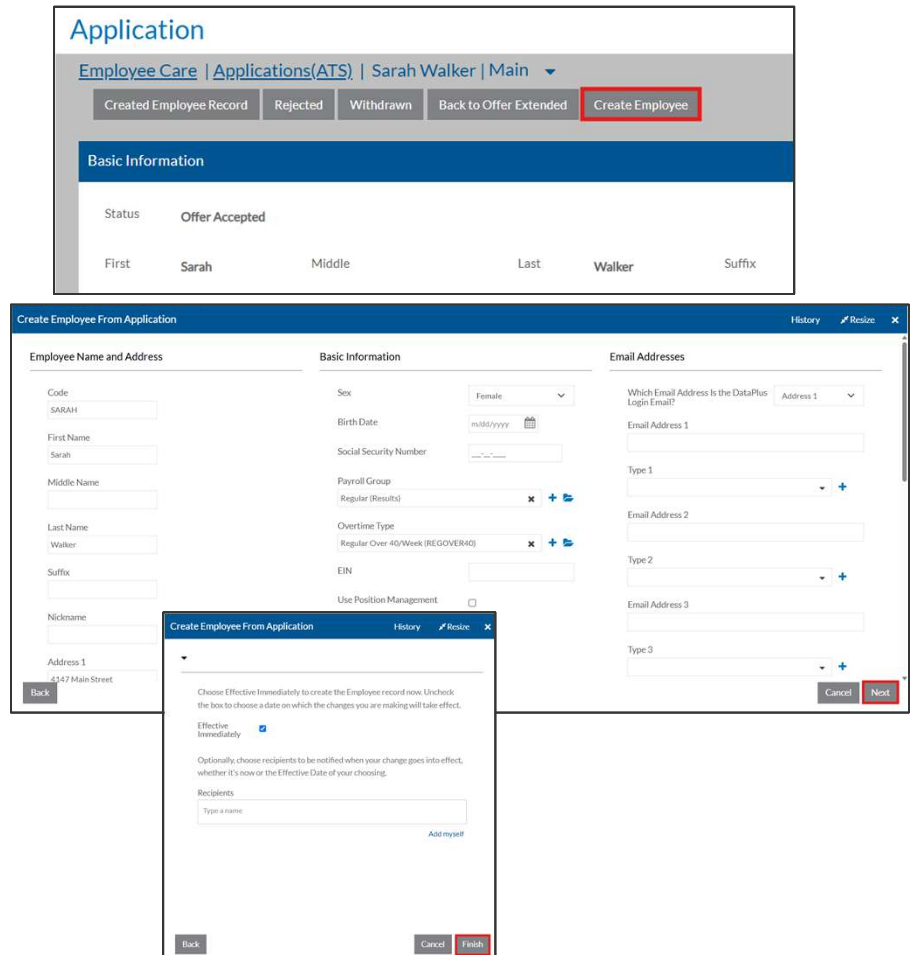




Creating an Employee from an Applicant

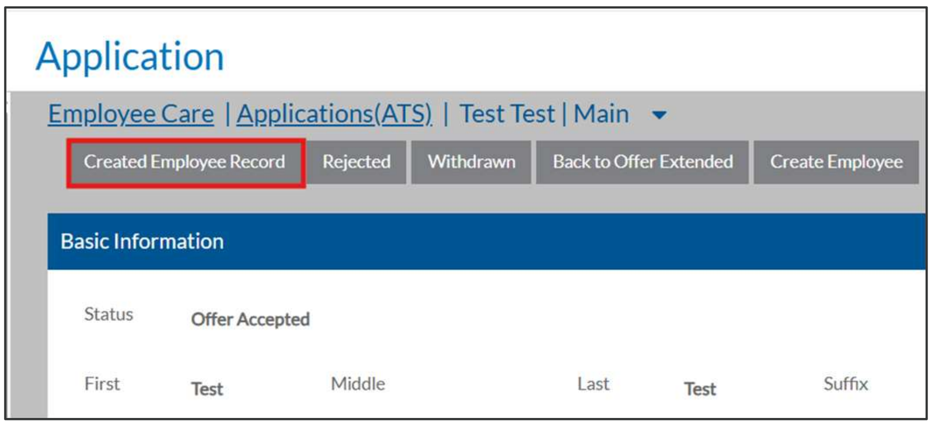
If you have decided to hire an application and the Application is in the **Offer Accepted** status, you can automatically copy the information from the applicant profile to create an employee profile.

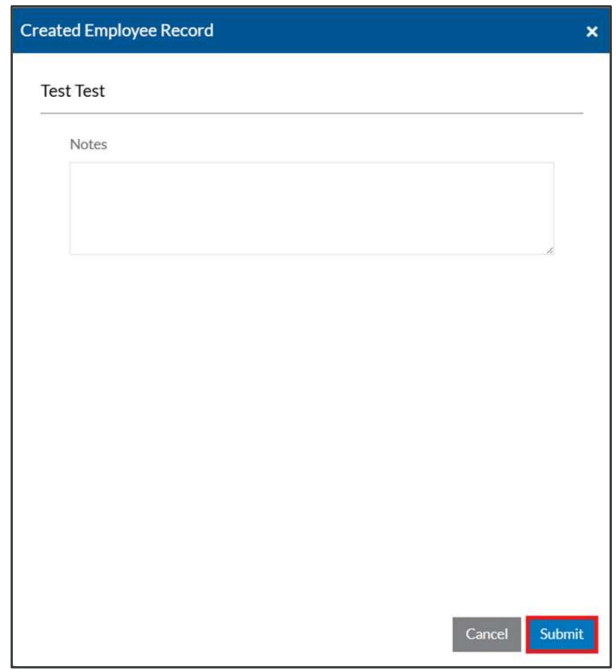
- Go to **Employee Care > Application Tracking** from the **Applicant Management** Card.
- Select the application of the applicant you want to hire.
- Click **Create Employee** button at the top of the screen. This will bring up the **Create Employee from Application** wizard.
  - In the wizard, click **Search** to search if the employee exists. If they do not, click on **Create New Employee.**
  - Fill out all required information and any additional information for the new employee, then click **Next**.
  - Fill out effective date for employee as well as any recipients to notify, then click **Finish.**



Creating an Employee from an Applicant

Once the wizard is completed and an employee record has been made from the applicant, you can then click the **Created Employee Record** button to change the applicant status. Once clicked, you can enter any notes, then click **Submit** to update status.





A Closer Look Inside the Platform

- ✓ Applicant Tracker
- ✓ Applicant Tracker Overview
- ✓ Managing Applications in Applicant Tracker
- ✓ Creating Employee from an Applicant in Applicant Tracker

Now, we'll jump into the system and highlight the key visuals — including the actual pages and fields.

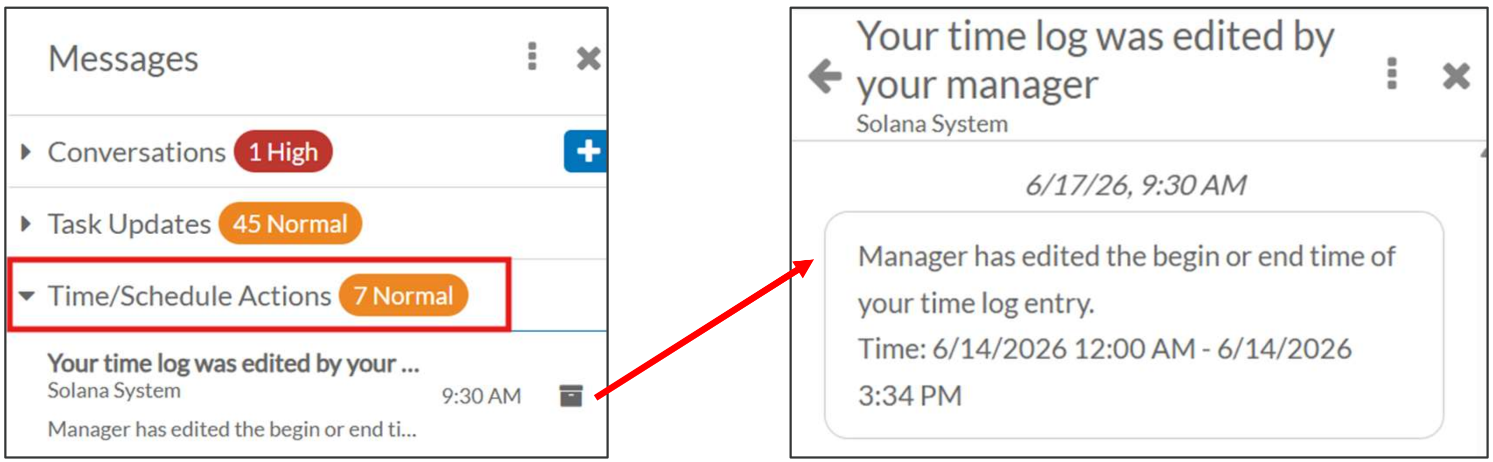
Release Updates

Release Updates

Time Tracking Log Entry Edit Notification

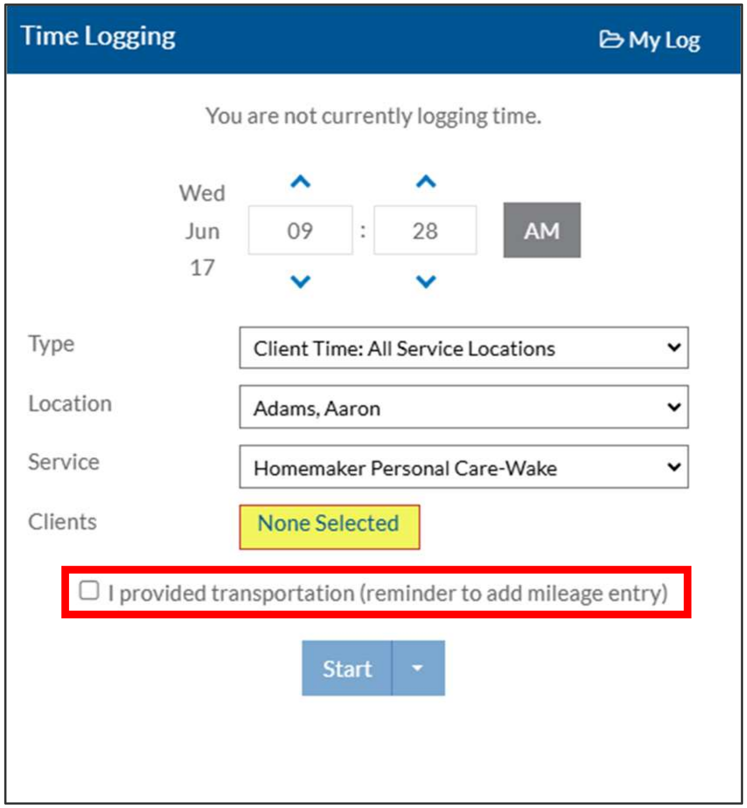
When a manager edits Time Tracking log entries (Time with Clients or Time without Clients), a notification message is added to the Message Center. The message clearly shows the original and updated begin/end times, who made the change, when it occurred, and includes a link to the affected log entry.

Messages can be found in the Message Center under the **Time/Schedule Actions** section.



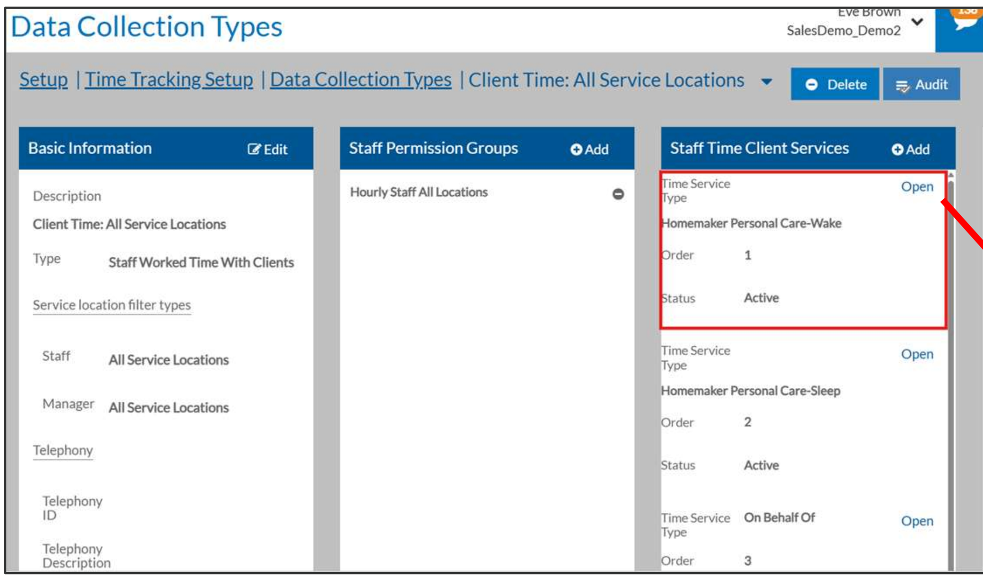
Mileage Reminder for Time Tracking

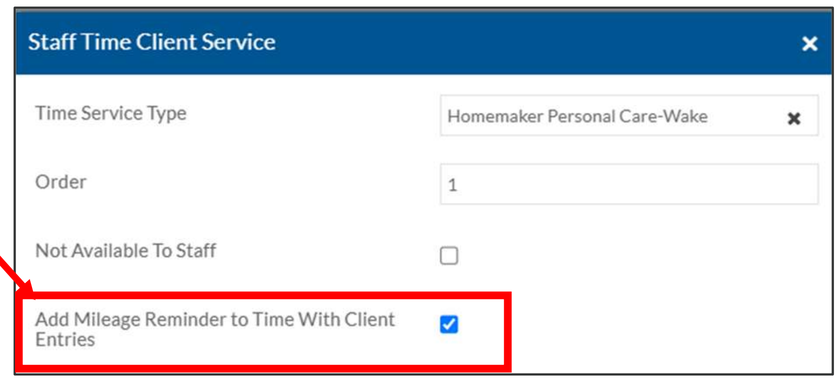
Added a checkbox for “Staff Worked with Clients” time tracking entries to add a reporting checkbox that states “I provided transportation (reminder to add mileage entry)”. This is a reminder to staff to complete mileage entries for reporting purposes and does not replace entering the actual mileage.



Mileage Reminder for Time Tracking Setup

To enable this feature, navigate to **Setup > Time Tracking**. Select **Data Collection Types** from the Security box. Select a Data Collection Type with a Transaction Type of **Staff Worked Time With Clients.** Under the **Staff Time Client Services** section, open the Time Service Type to add the checkbox to. Then in the window, check the box next to **Add Mileage Reminder to Time With Client Entries** and **Save**.





A Closer Look Inside the Platform

- ✓ Time Tracking Log Entry Edit Notification
- ✓ Mileage Reminder for Time Tracking

Now, we'll jump into the system and highlight the key visuals — including the actual pages and fields.

What's Next?

- Focused support for the next 60 days to help with adoption
- Explore and experiment with the new features in your databases
- Submit requests for assistance, we are here to support you

Any Questions?

Look out for an email on details about the next Lunch-ish and Learn!

thank you