



I/DD June Lunch(ish) and Learn

June 24, 2026

The content contained herein ("Confidential Information") are the confidential property of HHAeXchange and may not be copied or distributed outside the HHAeXchange organization without the express written consent of HHAeXchange. Distribution of this document or disclosure of any Confidential Information set forth herein to any party other than the intended recipient(s) of this presentation is expressly prohibited.



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



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 Plans

Client Care | Service Plans ⓘ

Client	Age	Start Date	End Date	What is important to me
Kim , Dave (KIMDAVE)	53.36	1/1/2010		
Squarepants, Spongebob (S...)	35.97	5/20/2026		My health

Tasks

Placements

Squarepants, Spongebob

Spongebob Squarepants ⓘ Open

Placement notes

Client notes

Placement notes

What is Important to Me: My health Service Plan

Add

Event Incident Inventory

Document

Bathing Assistance Communication Improvement

Vitals

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.

The screenshot shows the 'My Service Plan' form in the Client Care system. The form is divided into several sections, each with a numbered orange circle indicating its function:

- 1. Photo:** A section for uploading a client photo, with a 'Choose File' button and a 'No file chosen' message.
- 2. Client:** A dropdown menu for selecting the client.
- 3. Start Date:** A date picker field with a 'Required' indicator.
- 4. End Date:** A date picker field.
- 5. Details:** A large text area for adding details about the service plan.
- 6. About Me:** A section containing four sub-sections:
 - 6. My living environment:** A text area for describing the client's living environment.
 - 7. My interests and activities:** A text area for describing the client's interests and activities.
 - 8. What is important to me:** A text area for describing what is important to the client.
 - 9. How you can best support me:** A text area for describing how staff can best support the client.

The form also includes fields for Marital Status (Single), Age, Religion, Sex (Unknown), Audio Consent, Video Consent, and DNR Type. The top of the form has a 'Save and Add' button, a 'Save' button, and a 'Cancel' button. The bottom right has a 'Reports' button and a menu icon.

➤ 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.*

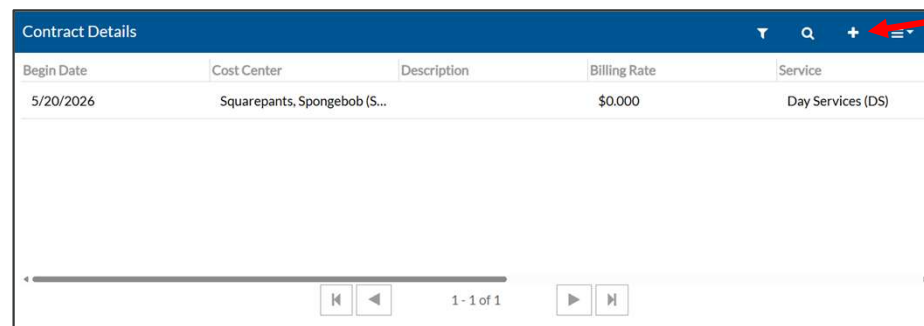
The screenshot shows the 'My Service Plan' form in the Client Care system. The form is divided into several sections:

- Photo:** A section for uploading a photo, with a 'Choose File' button and a 'No file chosen' status.
- Client Information:** Includes fields for Client (dropdown), Marital Status (Single), Age (dropdown), Religion (dropdown), Sex (Unknown), and Audio Consent (dropdown).
- Start Date:** A required field (marked with a red dot) for the start date, with a calendar icon.
- End Date:** A required field (marked with a red dot) for the end date, with a calendar icon.
- Details:** A large text area for additional information.
- About Me:** A section with four sub-sections: 'My living environment', 'My interests and activities', 'What is important to me', and 'How you can best support me'. Each sub-section has a corresponding empty box for input.

*Will review in detail on later slides

➤ Adding Contract Details to a Service Plan

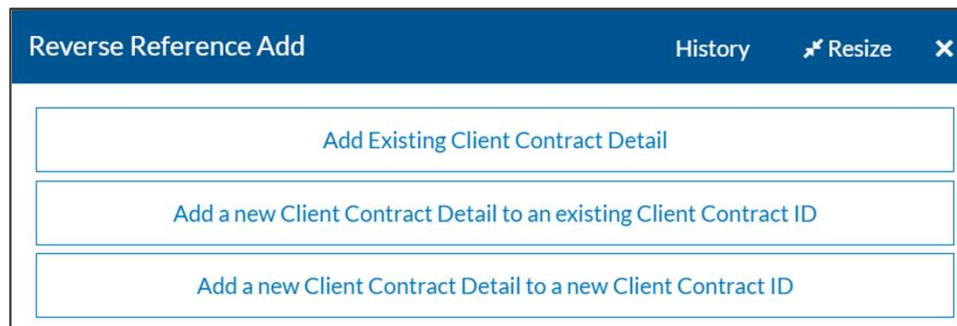
- Contract Details can be linked to a Service Plan in the **Contract Details** section. To add, click the + in the top right corner.



The screenshot shows a table titled 'Contract Details'. The table has five columns: 'Begin Date', 'Cost Center', 'Description', 'Billing Rate', and 'Service'. There is one data row with the following values: '5/20/2026', 'Squarepants, Spongebob (S...', '\$0.000', and 'Day Services (DS)'. The table is part of a larger interface with a blue header bar containing a search icon, a '+' icon, and a list icon. A red arrow points to the '+' icon. At the bottom of the table, there is a pagination bar showing '1 - 1 of 1' and navigation buttons.

Begin Date	Cost Center	Description	Billing Rate	Service
5/20/2026	Squarepants, Spongebob (S...		\$0.000	Day Services (DS)

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



The screenshot shows a dialog box titled 'Reverse Reference Add'. It has a blue header bar with 'History', 'Resize', and 'Close' icons. The dialog contains three buttons with the following text: 'Add Existing Client Contract Detail', 'Add a new Client Contract Detail to an existing Client Contract ID', and 'Add a new Client Contract Detail to a new Client Contract ID'.

Reverse Reference Add

History Resize Close

Add Existing Client Contract Detail

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

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

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

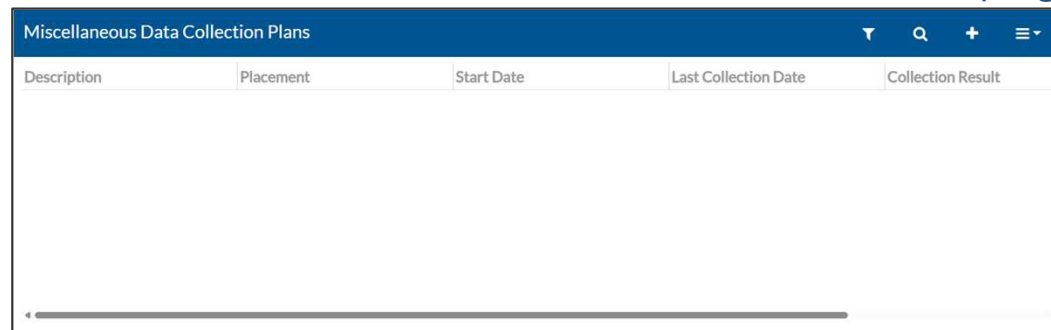
Select if you want to add a new Program Plan Objective to an existing Program Plan to link to the Service Plan.

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

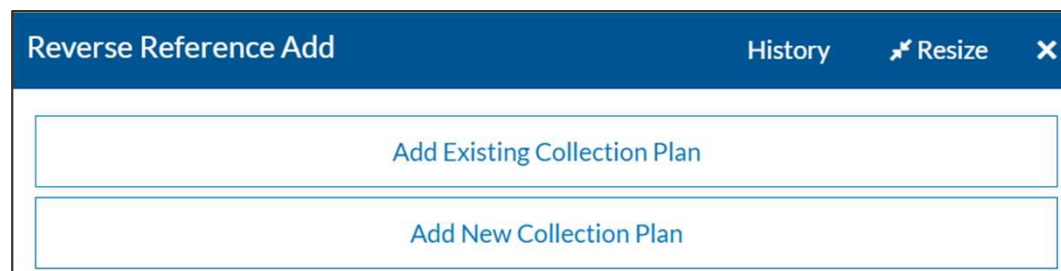
- Miscellaneous Data Collection Plans can be linked to a Service Plan within the Service Plan in the **Miscellaneous Data Collection Plans** section. To add, click the + in the top right corner.



The screenshot shows a table titled "Miscellaneous Data Collection Plans". The table has a dark blue header bar with a search icon, a plus icon, and a menu icon. Below the header, the table has five columns: "Description", "Placement", "Start Date", "Last Collection Date", and "Collection Result". The table body is currently empty, and there is a horizontal scrollbar at the bottom.

Description	Placement	Start Date	Last Collection Date	Collection Result
-------------	-----------	------------	----------------------	-------------------

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



The screenshot shows a dialog box titled "Reverse Reference Add". It has a dark blue header bar with "History", "Resize", and "Close" icons. The dialog contains two buttons: "Add Existing Collection Plan" and "Add New Collection Plan".

Reverse Reference Add

History

Resize

Close

Add Existing Collection Plan

Add New Collection 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:

Client Contract Details

Main ▾

▼ Contract Detail Information

Begin Date	5/1/2026	📅
End Date	4/30/2027	📅
Service Plan	Spongebob Squarepants May 20 26 -	✕ + 📁
Billing Service Type	Day Services (DS)	✕ + 📁
Contract Code	A25 (A25)	✕ + 📁
Global Billing Rate	☒	
Income Statement Account	Day Services Revenue (DAY)	✕ + 📁

Program Plan Objective:

Program Plan Objectives

Main ▾

▼ Objective Information

Description	Communication Improvement
Objective	Spongebob needs assistance improving communication.
Start Date	5/20/2026
End Date	
Service Plan	Spongebob Squarepants May 20 26 - 📁

Misc. Data Collection Plan:

View

▼ Plan Information Edit

Client	Squarepants, Spongebob (SPONSQUA) 📁
Placement	Squarepants, Spongebob-Squarepants, Spongebob-Day Programs-Vocational 📁
Description	Vitals
Instructions	Take client's blood pressure, pulse, blood sugar, and weight for the day.
Start Date	5/20/2026
End Date	
Service Plan	Spongebob Squarepants May 20 26 - 📁

➤ 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

➤ 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.

This screenshot shows the external Form.io application. It features a header with tabs: 'Applicant Information' (selected), 'Affirmative Action/EEOC Information', 'Employment Eligibility', 'Availability', and 'Additional Information and Consents'. Below the header is a logo placeholder labeled 'Your Logo'. The 'Contact Information' section includes fields for First Name, Middle Name, Last Name, Suffix, Email Address, Phone Number, Address, City, State, and Zip Code. The 'Positions Applied For' section has a dropdown menu for 'Position Applied For'.

This screenshot shows the 'Application' screen in the Employee Care system. The header includes 'Employee Care | Applications(ATS) | Sarah Walker | Main'. Below the header are tabs: 'Created Employee Record', 'Rejected', 'Withdrawn', 'Back to Offer Extended', and 'Create Employee'. The 'Basic Information' section is active, showing details for Sarah Walker, including her status 'Offer Accepted', address '4147 Main Street', city 'Denver', state 'Colorado', and zip '80238'. The 'Application Information' section on the right shows details like 'Application Date: 8/14/2024', 'Position Applied For: Direct Care', and 'Recruitment Source: Internet (NET)'. A red arrow points from the 'Contact Information' section of the external form to the 'Contact Information' section of the Employee Care application.

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.

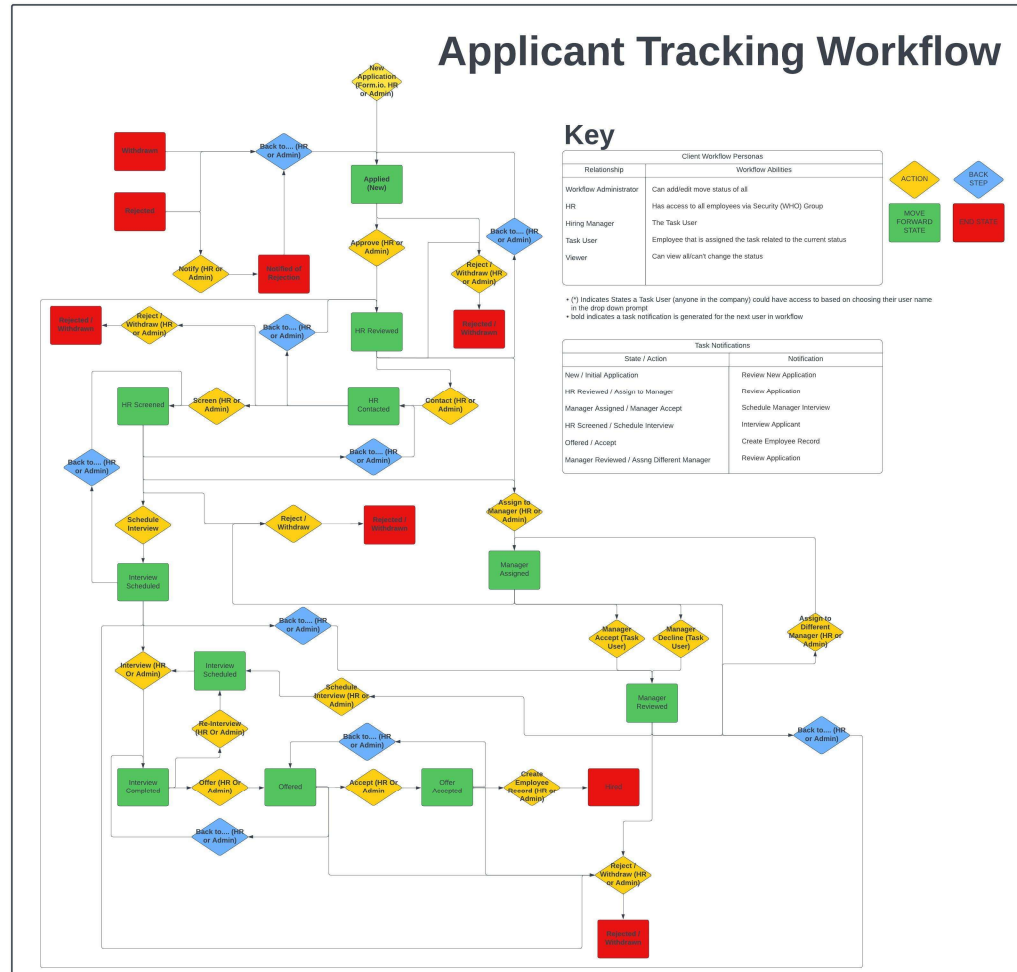
- **Basic Information**
- **Application Information**
- **Demographics**
- **Education**
- **Interviews***
- **Hired Information***

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

The screenshot displays the 'Application' form in DataPlus, titled 'Employee Care | Applications(ATS) | Main'. The form is divided into several sections:

- Basic Information:** Includes fields for Status (dropdown), First, Middle, Last, and Suffix names. Red 'Required' labels are present for Last and Suffix. Contact Information includes Address, City, State (dropdown), Zip, Phone, Email Address, Best Time To Call, and SSN.
- Application Information:** Includes Application Date (6/10/2026), Position Applied For (dropdown), Hiring Manager (dropdown), Previous Employee (No), Withdraw Reason (dropdown), Reject Reason (dropdown), Previous State (dropdown), Recruitment Source (dropdown), Referred By (dropdown), and Referring Employee (text field).
- Demographics:** Includes Sex (Unknown), Gender (dropdown), Preferred Pronouns (dropdown), Race (dropdown), Ethnicity (dropdown), Disabled (Unknown), and Veteran Status (Unknown).
- Education:** A table with columns: Begin Date, Graduated, Degree, End Date, and Course of Study.
- Interviews:** A table with columns: Primary Interviewer, Date, Time, and Did Not Attend.
- Hired Information:** Includes Hire Date (m/d/yyyy), Existing Employee (checkbox), Job Title Hired For (dropdown), and Position Hired For (dropdown).

➤ Applicant Tracking Workflow

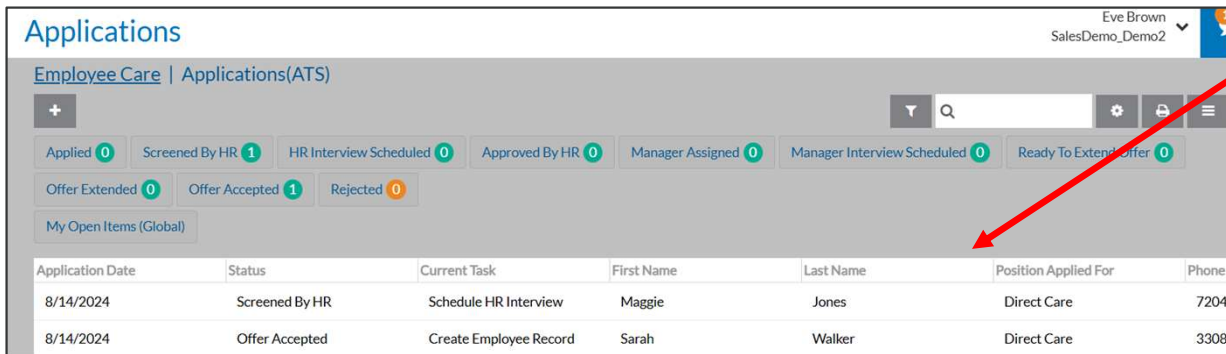


➤ Managing Applications

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.



Applications

Employee Care | Applications(ATS)

Applied 0 | Screened By HR 1 | HR Interview Scheduled 0 | Approved By HR 0 | Manager Assigned 0 | Manager Interview Scheduled 0 | Ready To Extend Offer 0 | Offer Extended 0 | Offer Accepted 1 | Rejected 0

My Open Items (Global)

Application Date	Status	Current Task	First Name	Last Name	Position Applied For	Phone
8/14/2024	Screened By HR	Schedule HR Interview	Maggie	Jones	Direct Care	7204
8/14/2024	Offer Accepted	Create Employee Record	Sarah	Walker	Direct Care	3308

Applicant Management
Applicants
Applications
Application Tracking

➤ 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.

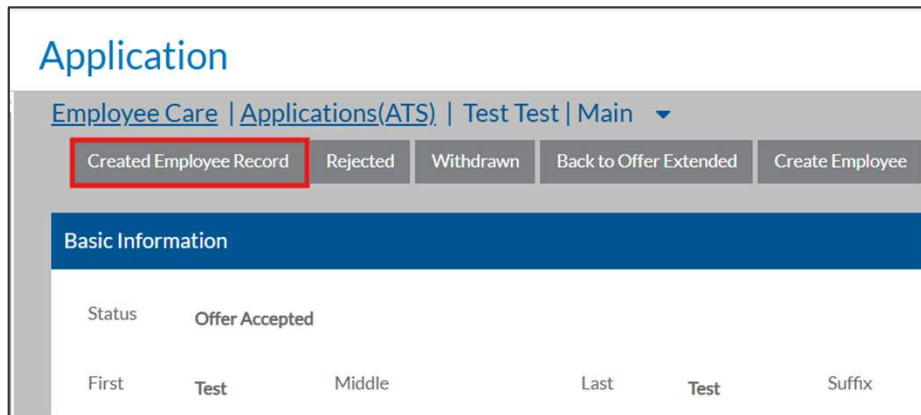
- Go to **Employee Care > Application Tracking** from the **Applicant Management** Card.
- Select the application of the applicant you want to hire.
- Click **Create Employee** button at the top of the screen. This will bring up the **Create Employee from Application** wizard.
- In the wizard, click **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**.

The screenshot shows the 'Application' page for Sarah Walker. The status is 'Offer Accepted'. At the top, there are buttons: 'Created Employee Record', 'Rejected', 'Withdrawn', 'Back to Offer Extended', and 'Create Employee' (highlighted with a red box). Below this is the 'Basic Information' section, which displays the applicant's details: Status (Offer Accepted), First Name (Sarah), Middle Name (Walker), Last Name (Walker), and Suffix.

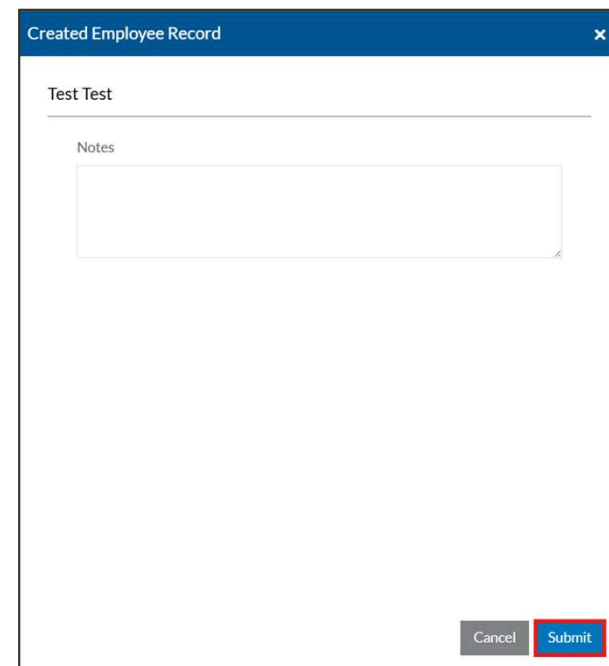
The screenshot shows the 'Create Employee From Application' wizard. It has three main sections: 'Employee Name and Address', 'Basic Information', and 'Email Addresses'. The 'Employee Name and Address' section includes fields for Code (SARAH), First Name (Sarah), Middle Name (Walker), Last Name (Walker), Suffix, Nickname, and Address 1 (4147 Main Street). The 'Basic Information' section includes fields for Sex (Female), Birth Date (mm/dd/yyyy), Social Security Number, Payroll Group (Regular (Results)), Overtime Type (Regular Over 40/Week (REGOVER40)), EIN, and Use Position Management. The 'Email Addresses' section includes a dropdown for 'Which Email Address is the DataPlus Login Email?' and three email address fields (Email Address 1, Email Address 2, Email Address 3) with their respective types. At the bottom, there are 'Back', 'Cancel', and 'Next' buttons. A modal window is open over the 'Basic Information' section, titled 'Create Employee From Application', which contains a checkbox for 'Effective Immediately' (checked), a text area for 'Recipients' (with a placeholder 'Type a name' and an 'Add myself' link), and 'Back', 'Cancel', and 'Finish' buttons at the bottom.

➤ 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.



The screenshot shows a web application interface. At the top, the title 'Application' is displayed. Below it, a breadcrumb trail reads 'Employee Care | Applications(ATS) | Test Test | Main'. A row of buttons is visible: 'Created Employee Record' (highlighted with a red box), 'Rejected', 'Withdrawn', 'Back to Offer Extended', and 'Create Employee'. Below the buttons is a section titled 'Basic Information' in a blue header. Under this header, the 'Status' is 'Offer Accepted'. Below that, the 'First' name is 'Test', 'Middle' is blank, 'Last' is 'Test', and 'Suffix' is blank.



The screenshot shows a modal window titled 'Created Employee Record'. Inside the modal, the text 'Test Test' is displayed. Below it is a text area labeled 'Notes'. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Submit' (highlighted with a red box).

> 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.



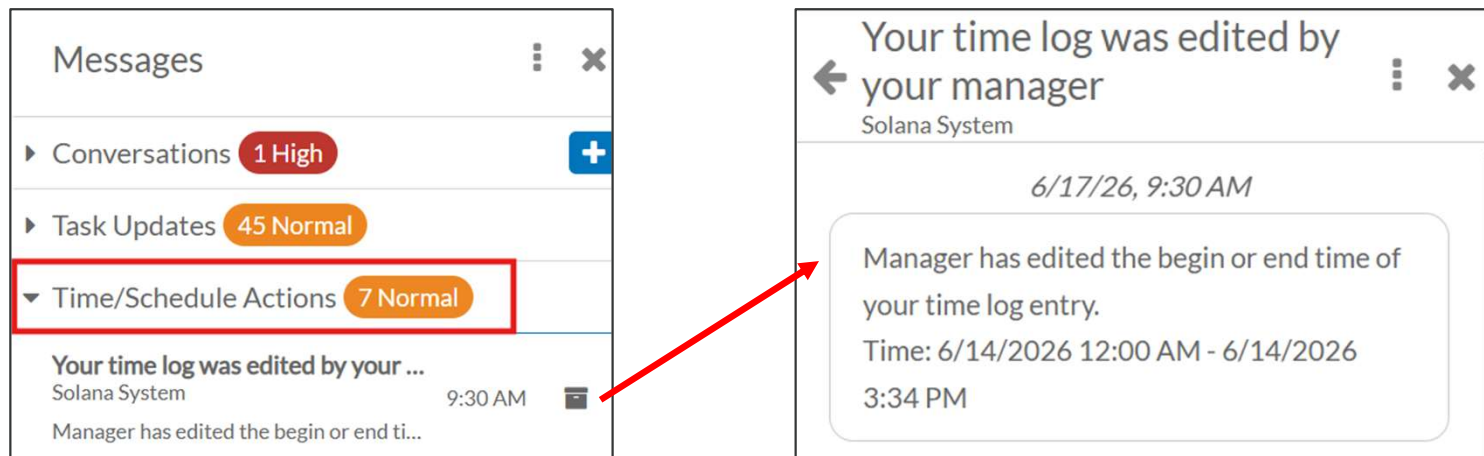


Release Updates

➤ 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.

Time Logging

➤ My Log

You are not currently logging time.

Wed
Jun
17

09 : 28

AM

Type

Client Time: All Service Locations

Location

Adams, Aaron

Service

Homemaker Personal Care-Wake

Clients

None Selected

☐ I provided transportation (reminder to add mileage entry)

Start

➤ 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**.

The screenshot shows the 'Data Collection Types' setup page. The 'Staff Time Client Services' section is highlighted with a red box, and an arrow points from it to the 'Staff Time Client Service' window.

Basic Information	Staff Permission Groups	Staff Time Client Services
Description Client Time: All Service Locations	Hourly Staff All Locations	Time Service Type Open Homemaker Personal Care-Wake Order: 1 Status: Active
Type Staff Worked Time With Clients		Time Service Type Open Homemaker Personal Care-Sleep Order: 2 Status: Active
Service location filter types		Time Service Type Open On Behalf Of Order: 3
Staff All Service Locations		
Manager All Service Locations		
Telephony		
Telephony ID		
Telephony Description		

The screenshot shows the 'Staff Time Client Service' window. The 'Add Mileage Reminder to Time With Client Entries' checkbox is checked and highlighted with a red box.

Staff Time Client Service	
Time Service Type	Homemaker Personal Care-Wake
Order	1
Not Available To Staff	☐
Add Mileage Reminder to Time With Client Entries	☒

➤ 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