Follow along on your device. If the screen is hard to see, download the slide deck by using the CVENT App.

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Advancing Clinical Documentation

With HHAeXchange Clinical & Forms



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speakers



Meet Robert Moore

Team: Product Management
Tenure: 2 years
Fun Fact: I dream of living in Ireland and running a bed & breakfast.



Meet Teavy Leonardson

Team: Customer Experience
Tenure: 4 years
Fun Fact: I look forward to my family's annual cargo bike trip to Martha's Vineyard.

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agenda

- Why Clinical Documentation Is Changing
- Product Direction
- Enhanced Clinical Features
  - eMAR
  - Vital Signs
  - Wound Tracking
- Centralized Clinical Menu & HHAeXchange Forms
- Your Turn! Interactive Activity
- Key Takeaways
- Resources
- Q&A

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Training Overview:

This session reviews recent enhancements in HHAeXchange Clinical and HHAeXchange Forms, including structured documentation tools, centralized configuration, and updates that support stronger oversight and compliance.

Recommended Audience:

Agency Owners, Directors of Nursing (DONs), Clinical Coordinators,

Clinical Supervisors, & Operations Leaders

Today's Objectives

- Standardize clinical documentation with **structured workflows**
- Reduce documentation gaps and **improve compliance**
- Capture key data across **eMAR**, **Vital Signs**, and **Wound Tracking**
- **Centralize clinical** setup and management

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Why Clinical Documentation Is Changing

What Teams Are Dealing With Today

- Documentation lives across paper, systems, and free text
- Key updates are not tied to the visit workflow
- Trends and gaps are difficult to identify
- Signatures require manual steps or uploads
- Clinical Supervisors spend time piecing information together

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What Changes with Structured Documentation

- Documentation is captured in structured workflows
- Required fields reduce missed or incomplete entries
- Status tracking enables real-time visibility
- Signatures are locked and time-stamped
- Data becomes reportable and audit-ready

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PRODUCT DIRECTION

Strategic Direction

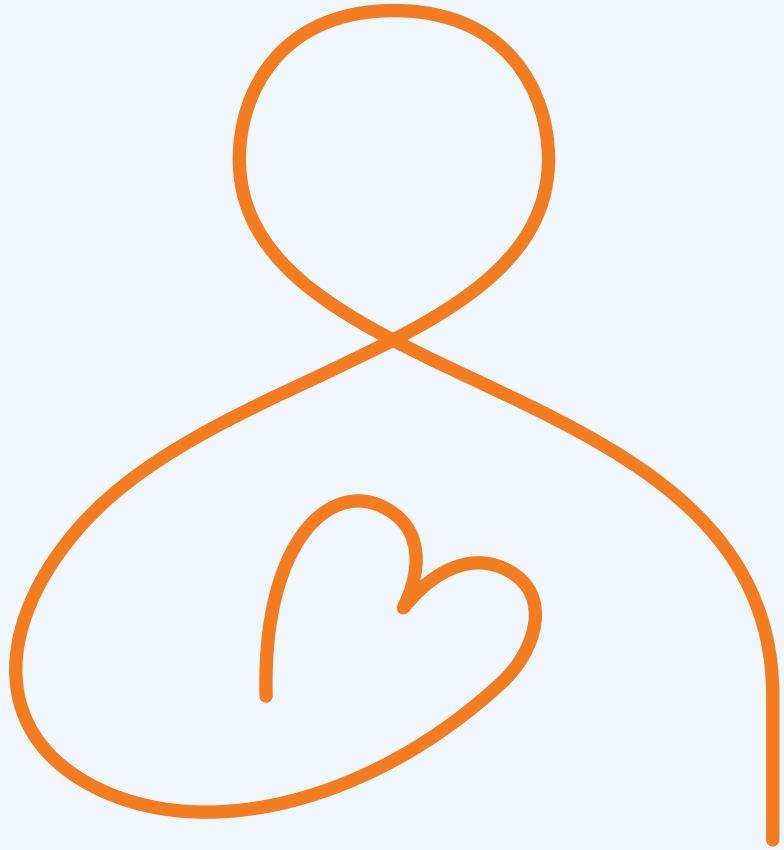
- Move clinical documentation into one unified platform
- Reduce reliance on external tools and custom workflows
- Centralize setup within a dedicated Clinical experience
- Strengthen data integrity with system controls
- Enable reporting and oversight through structured data



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What This Means in Practice

- Clinicians document directly within structured modules, not separate tools
- Medication, vitals, and wounds follow guided workflows
- Administrators manage setup in one centralized location
- Documentation status is visible without manual tracking



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Poll Time!

How does your agency manage clinical documentation today?



Mostly paper



A mix of paper and systems



Multiple systems



Fully digital in one system



ENHANCED CLINICAL FEATURES

Enhanced Clinical Features



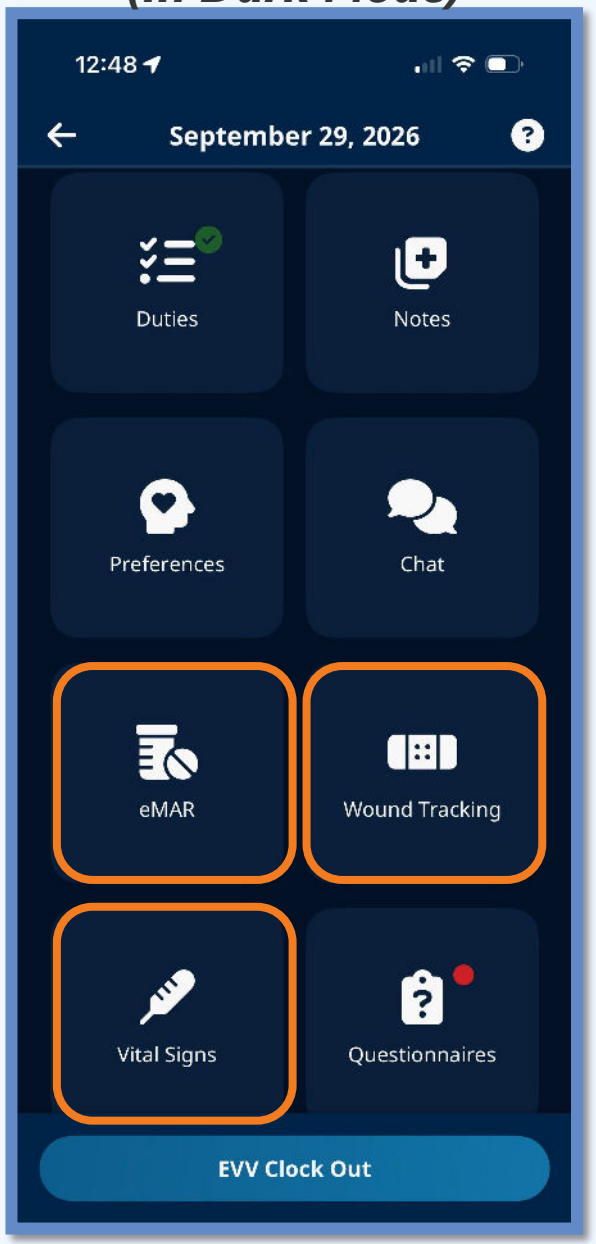






Mobile App View

(In Dark Mode)



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eMAR

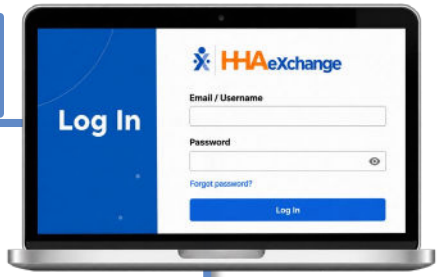
eMAR Overview

eMAR (Electronic Medication Administration Record) is the digital record used to document when medications are administered, held, refused, or missed.

- Medication documentation is tied directly to scheduled visits
- Each scheduled medication requires a documented status
- Documentation remains connected to the visit record

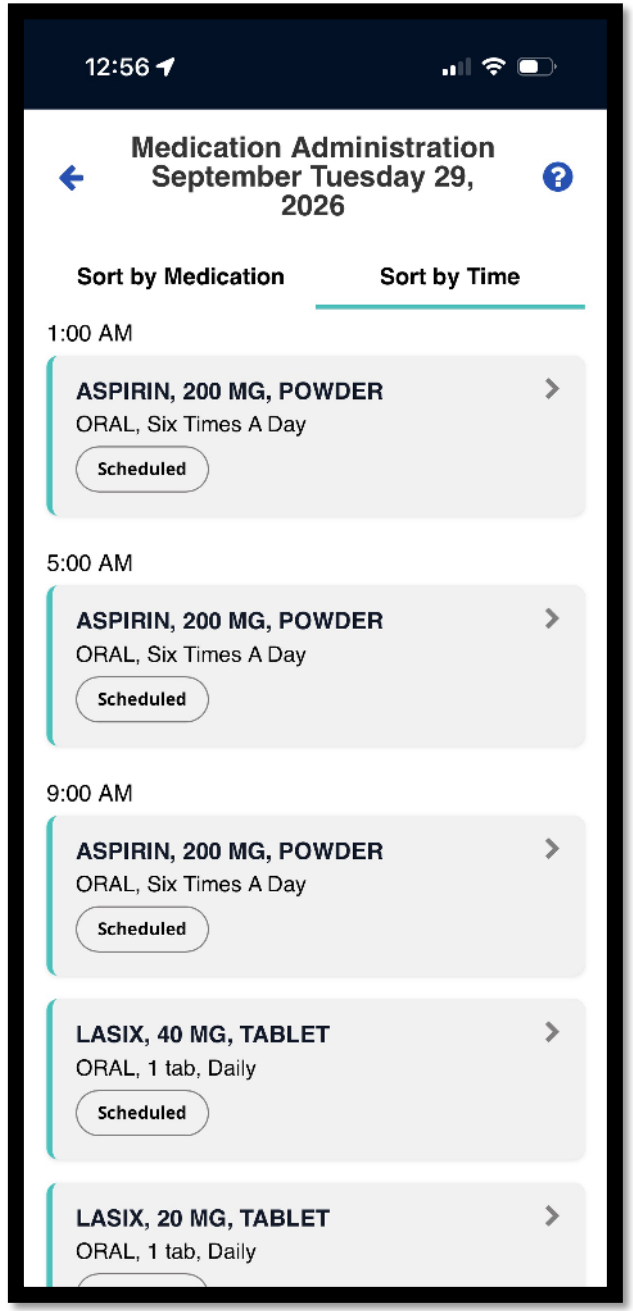
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eMAR: Documentation in the HHAeXchange Portal



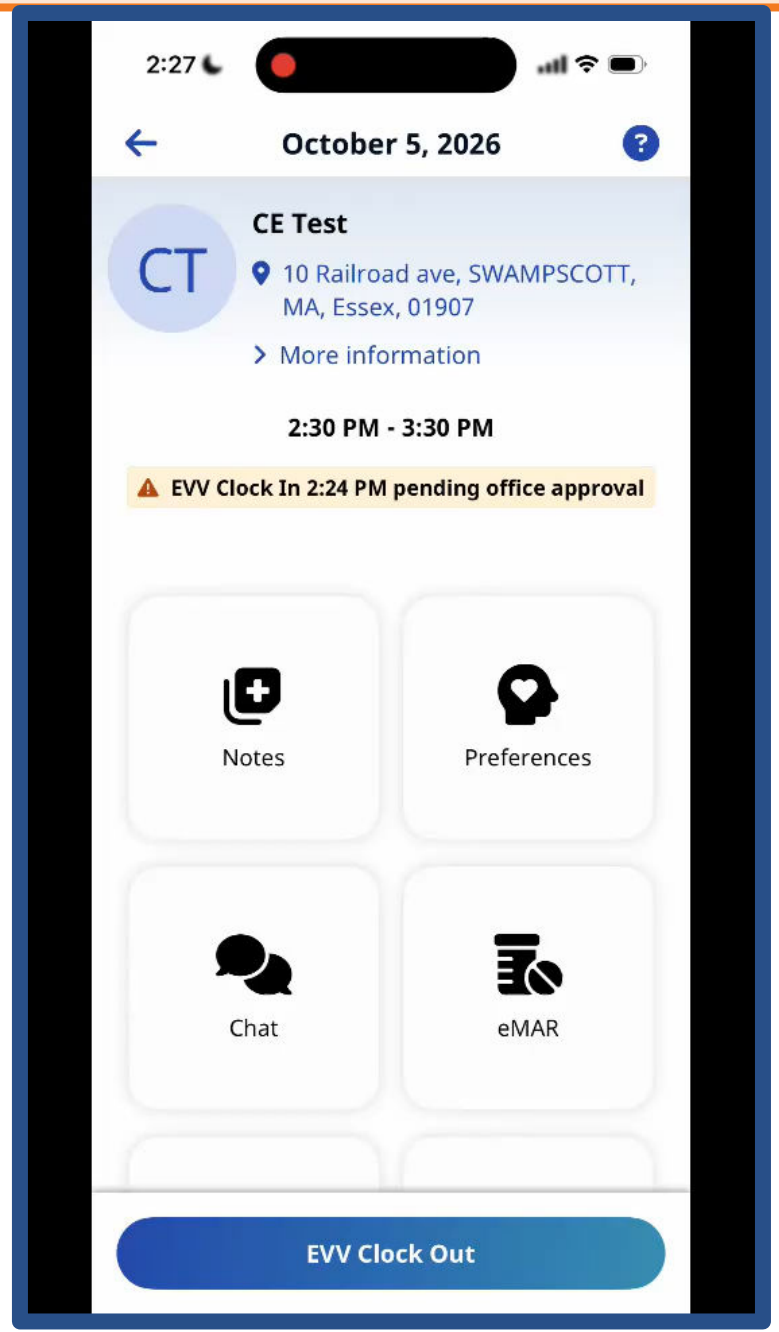
eMAR: Mobile Documentation

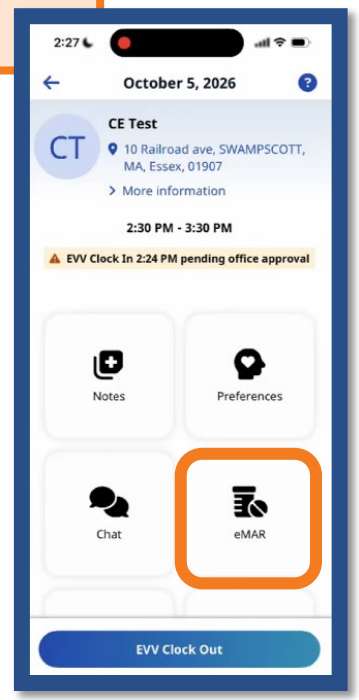
Document and track medication administration directly from the HHAeXchange+ Mobile App.



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eMAR: Documentation in the HHAeXchange+ Mobile App





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Vital Signs

Vital Signs Overview

Vital Signs documentation allows clinicians to capture:

- Temperature
- Pulse
- Respiration
- Blood Pressure
- Oxygen Saturation
- Height, Weight, and BMI
- Pain Assessment
- Blood Sugar

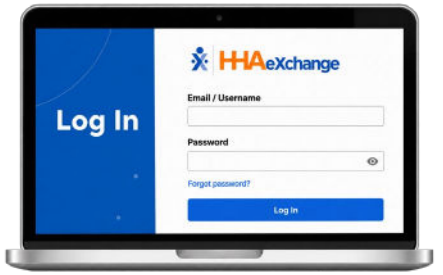
Vital signs can be documented independently or associated to a visit

Required fields support accurate and complete documentation

Entries are stored in the patient chart for ongoing tracking and trend review

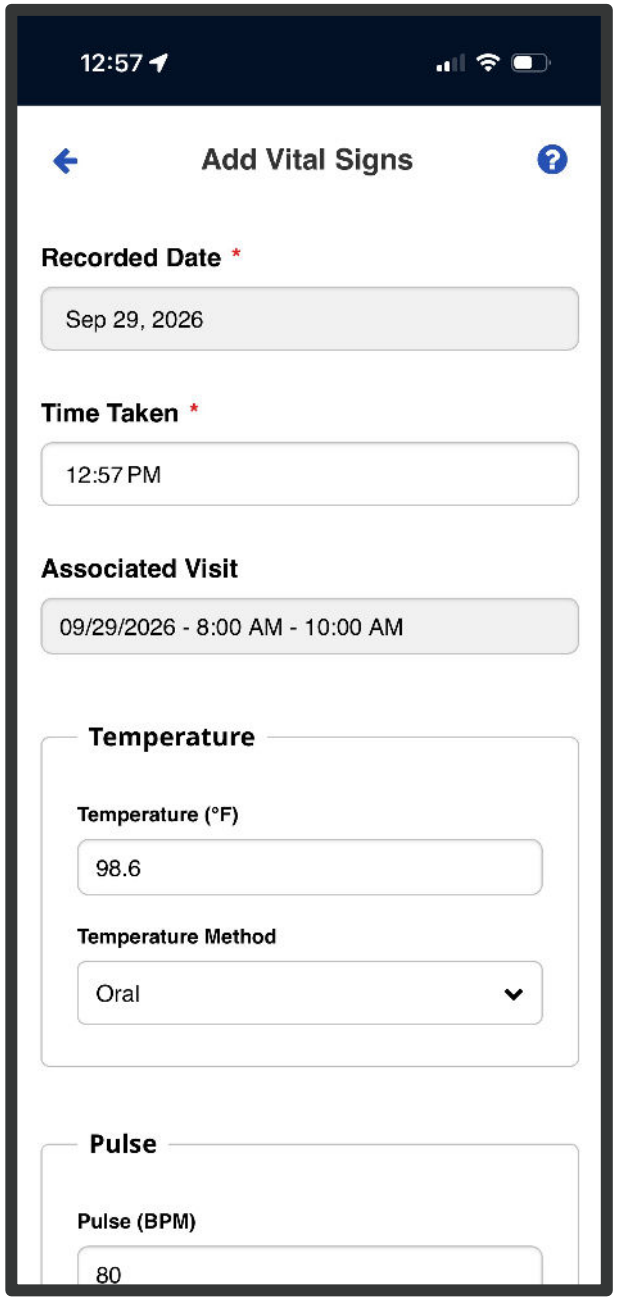
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Vital Signs: Documentation in the HHAeXchange Portal



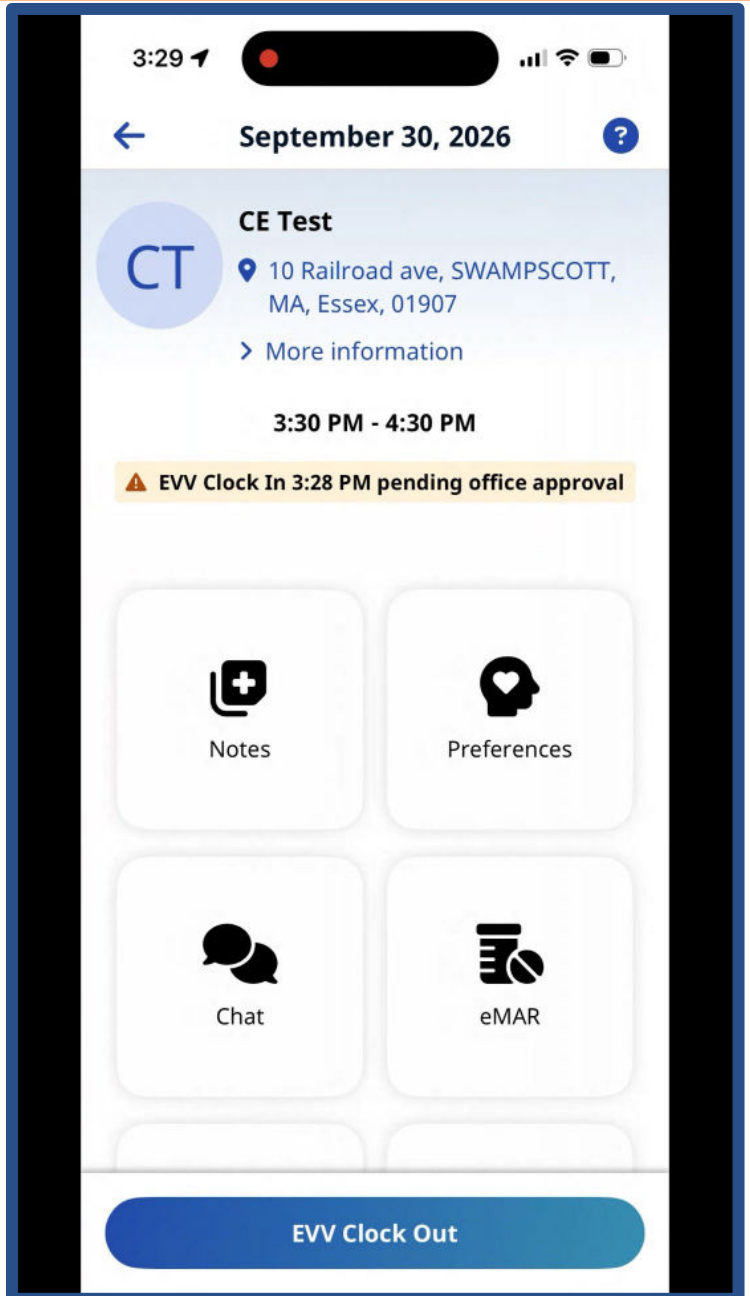
Vital Signs: Mobile Documentation

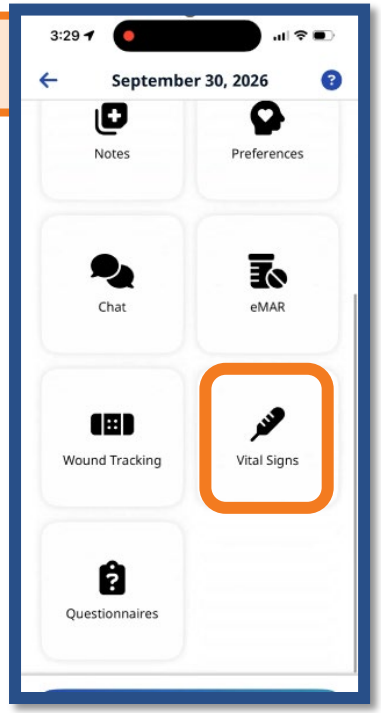
Document and track patient vital signs directly from the HHAeXchange+ Mobile App.



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Vital Signs: Documentation in the HHAeXchange+ Mobile App





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Wound Tracking

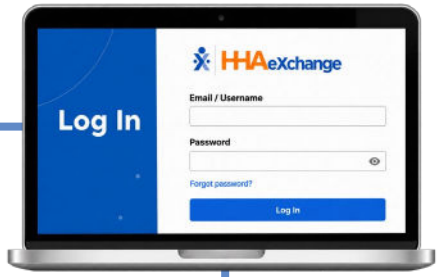
Wound Tracking Overview

Wound Tracking is the structured tool used to document wounds and monitor progression over time.

- Linked to a skilled visit
- Required fields guide consistent staging and measurement
- Reassessment supports tracking wound progression over time

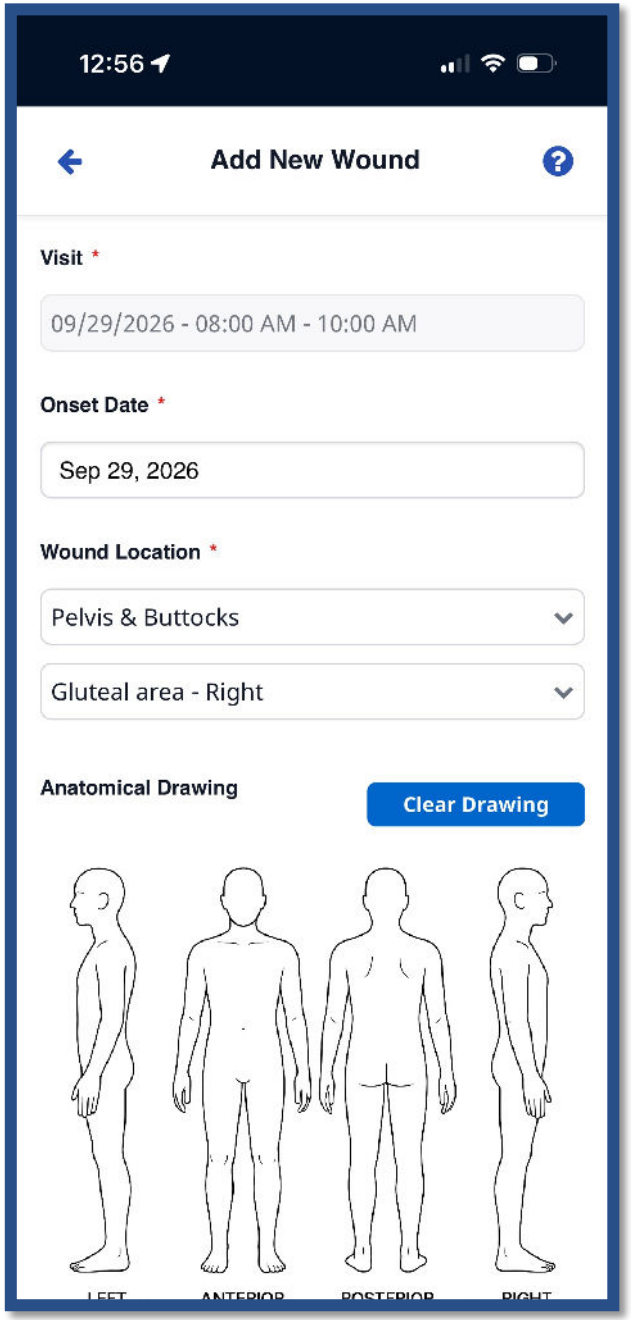
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Wound Tracking: Documentation in the HHAeXchange Portal



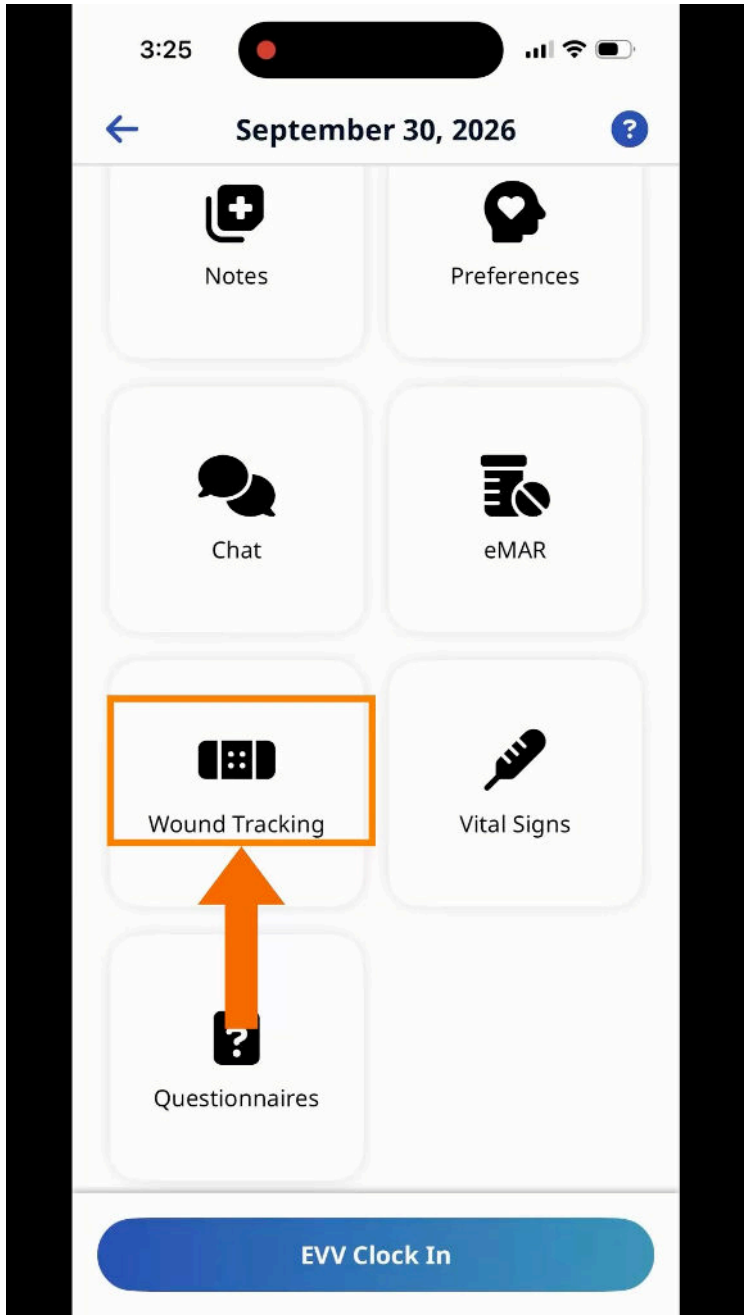
Wound Tracking: Mobile Documentation

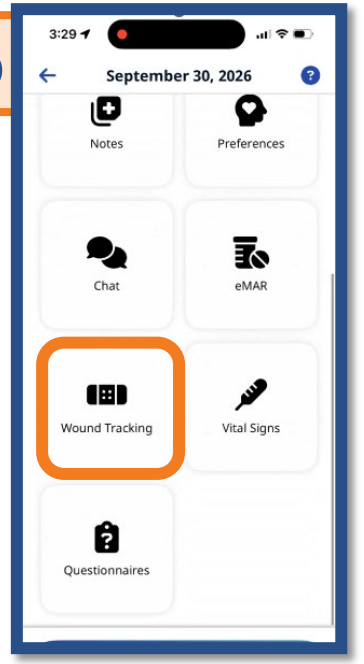
Document and track patient wounds, including wound location and assessment details, directly from the HHAeXchange+ Mobile App.



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Wound Tracking: Documentation in the HHAeXchange+ Mobile App



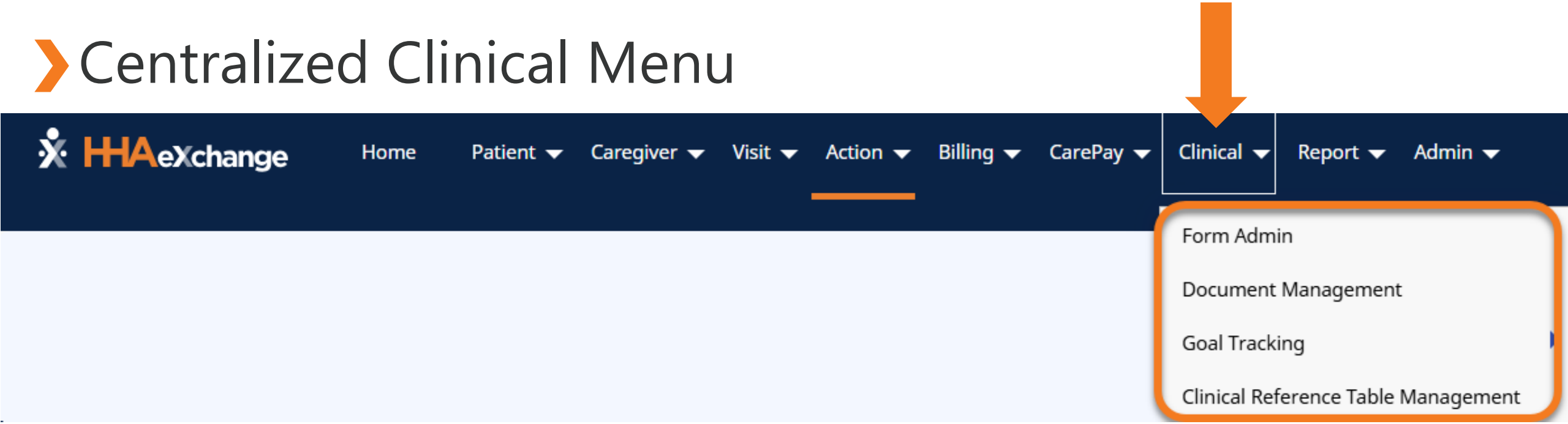


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CENTRALIZED CLINICAL MENU

Centralized Clinical Menu



Reduces time spent navigating across multiple menus

Simplifies configuration & setup for clinical administrative team

Creates a more consistent user experience

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Why It Matters

If a DON needs to update a form, adjust vital sign thresholds, or review clinical setup, they can go directly to the Clinical menu dropdown and manage everything from one place instead of navigating across multiple areas of the system.



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HHAeXchange Forms

Form Admin

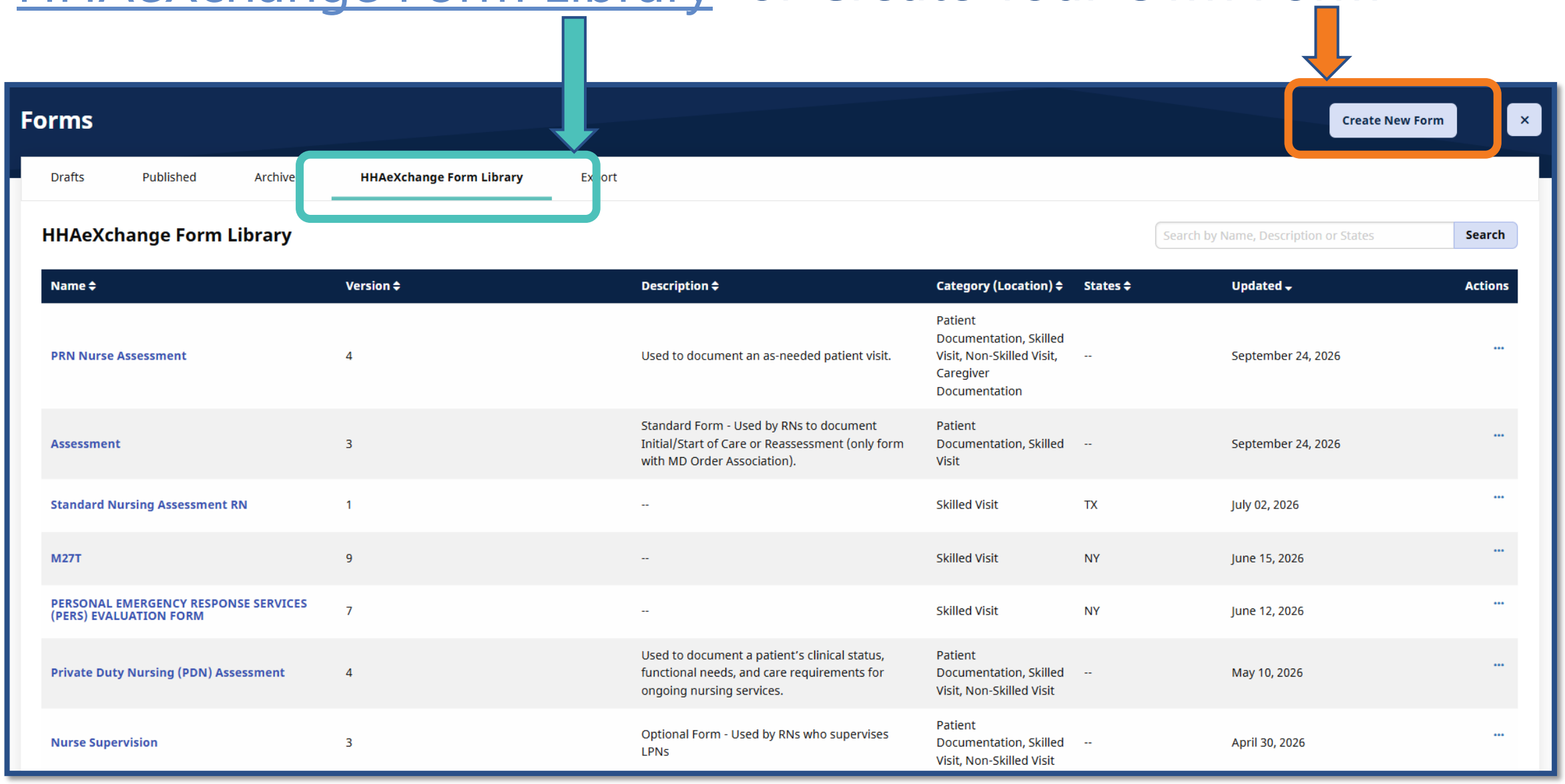
HHAeXchange Forms Overview

HHAeXchange Forms allows agencies to digitize paper or PDF forms and use them across clinical workflows.

- Forms can be assigned to workflows or completed as standalone patient documentation
- Required field setting ensure forms are completed before submission
- Documentation is stored and accessible within the patient record

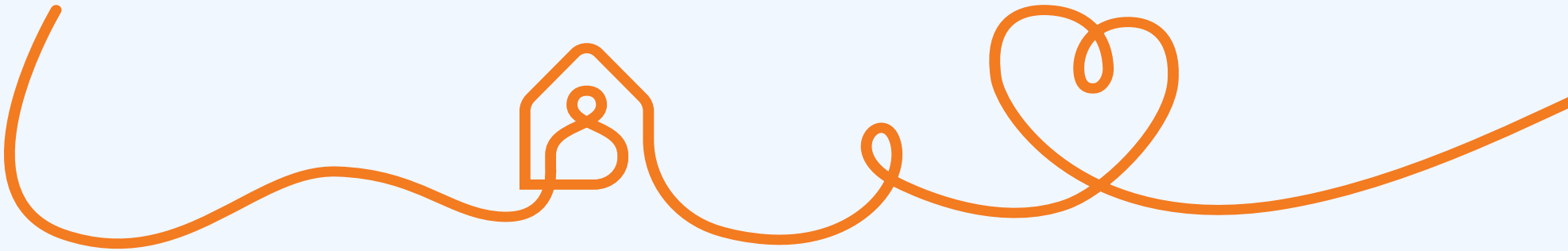
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HHAeXchange Form Library or Create Your Own Form



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Create New Form



Your Turn!

Your Turn! Let's Try eMAR

Scan the QR code or follow along as we explore eMAR together.

eMAR Interactive Guide



Let's try documenting medication administration in HHAeXchange!

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KEY TAKEAWAYS

KEY TAKEAWAYS

- HHAeXchange Clinical introduces structured features for eMAR, Vital Signs, Wound Tracking, and Forms
- Structured documentation improves visibility, reduces documentation gaps, and supports audit readiness
- Enhanced features improve workflow efficiency and support compliance
- Clinical tools and configuration are centralized and easier to manage

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RESOURCES

Clinical Resources

Clinical Knowledge Base



HHAeXchange Forms



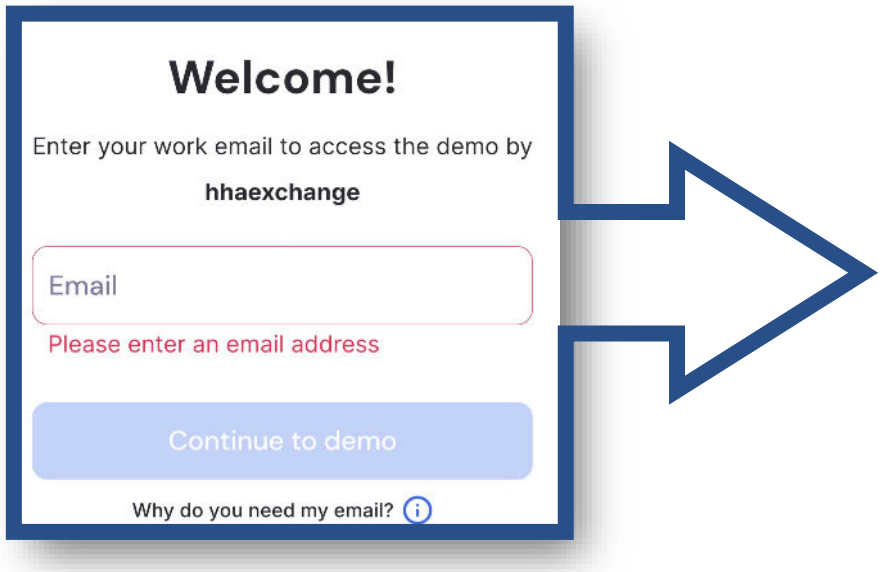
HHAeXchange Form Library



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Clinical Interactive Walnuts

Try these features out.



eMAR

Vital Signs

Wound Tracking

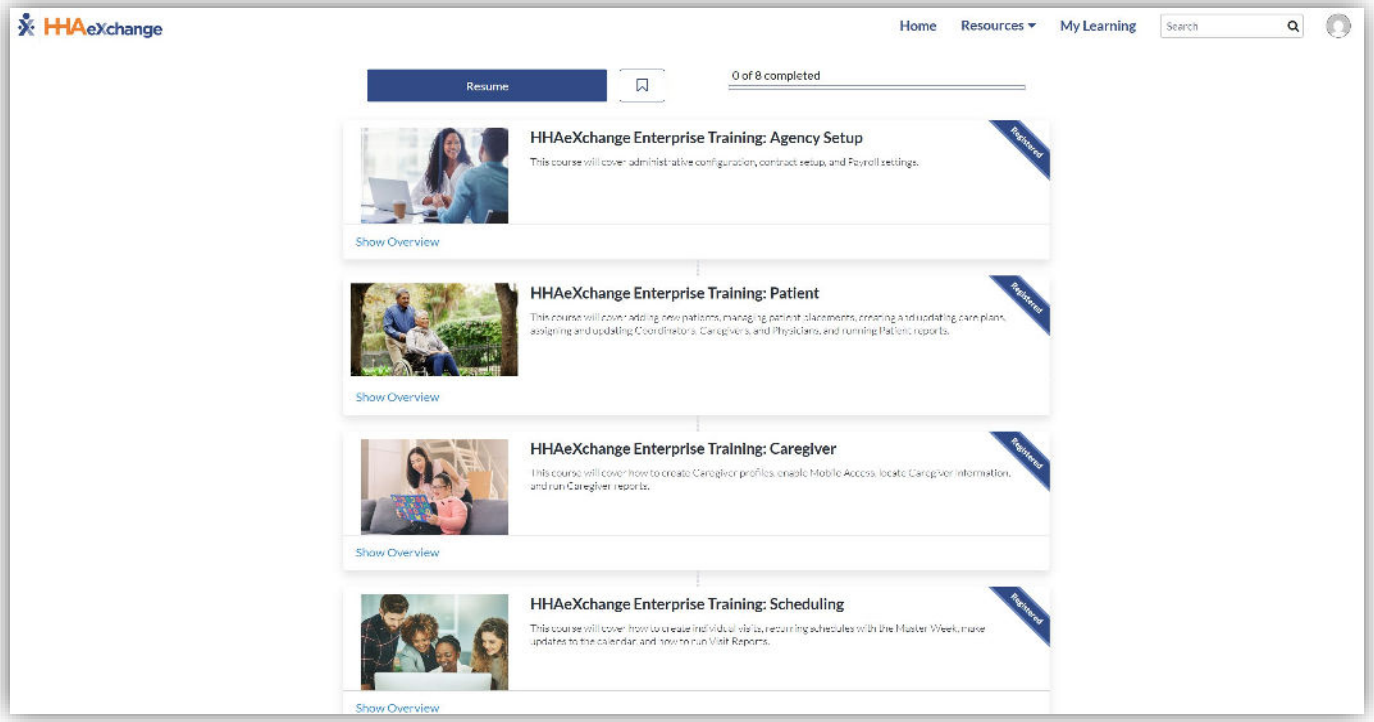
Forms

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HHAeXchange University

Onboarding Program Available

- HHAeXchange University is now available for providers to have a foundational overview of key topics such as:
  - Patient & Caregiver Management
  - Agency Setup
  - Visit Maintenance
  - Billing



https://university.hhaexchange.com

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Provider Resources: HHAeXchange Provider Knowledge Bases

Provider Knowledge Base

https://knowledge.hhaexchange.com/enterprise/Content/Home/Home-N.htm

Caregiver Knowledge Base

https://knowledge.hhaexchange.com/caregiver/Content/Home/Home-CG.htm

Third-Party EVV (EDI) Knowledge Base

https://knowledge.hhaexchange.com/edi/Content/Home/Home-C.htm

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PA Provider State Info Center

Your go-to resource for payer-specific EVV and implementation guidance

Use the Provider Info Center to find:

1. **Payer Requirements & Updates**

   EVV requirements, implementation updates, and important deadlines.

2. **Service Codes & Billing Guidance**

   Service code information and resources to support setup and billing.

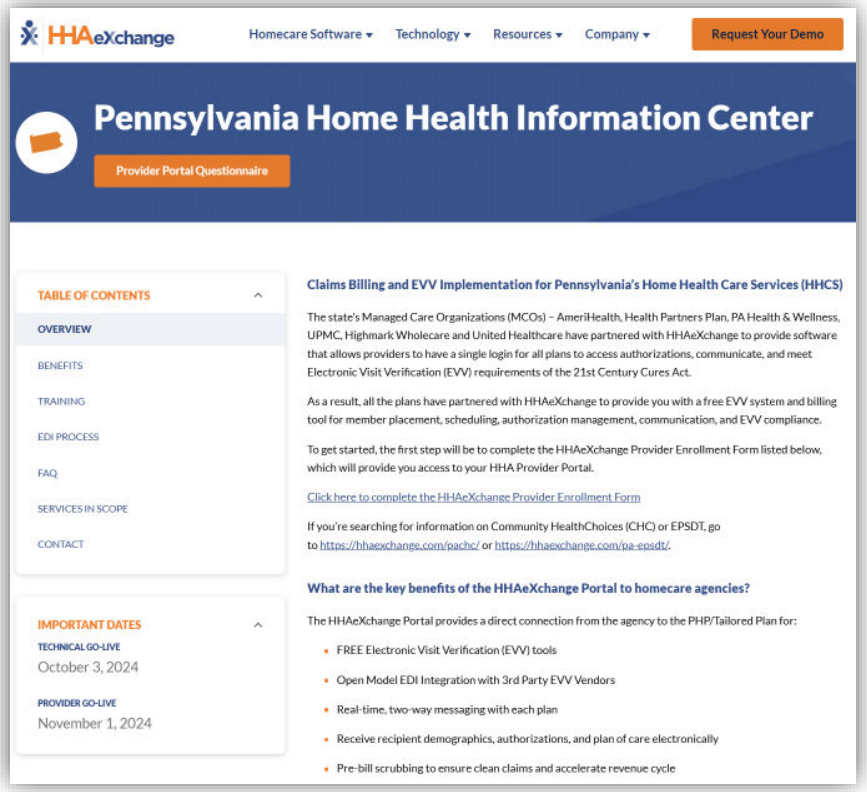
3. **Training & Webinars**

   Upcoming and on-demand training for key HHAeXchange workflows.

4. **EVV / EDI Resources & FAQs**

   Job aids, FAQs, EDI guidance, and implementation resources.

Bookmark the Provider Info Center for the latest updates and resources.



Use the Provider Info Center to stay current as payer resources and training opportunities are updated.

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Mark Your Calendars!

Visit the HHAeXchange Customer Events Page

- Register for upcoming live trainings and webinars tailored to your agency
- Find sessions on EVV, mobile app, scheduling, billing, reporting, and more
- Get expert tips, real-time answers, and practical takeaways to boost efficiency



Customer Training Events: Elevate Your Skills | HHAeXchange

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LEARN MORE

HHAeXchange Clinical

thank you

Please provide your feedback

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