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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Beyond the Duty List:

Introducing Goal Tracking Alongside Plan of Care



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speakers



Faride Beaubien

Role: Sr. Product Manager

Tenure at HHAeXchange: 2.5 yrs

Areas of Expertise: Clinical, Goal Tracking, Care Insights

Fun Fact: ¡Hablo español! I am training for a half marathon in December.



Teavy Leonardson

Role: Sr. Training Specialist

Tenure at HHAeXchange: 4 yrs

Areas of Expertise: Clinical

Fun Fact: Sok Sabai? Our family loves to go on cargo-biking adventures.

Today's Journey



01

Plan of Care: The Basics

From duties to visit documentation



02

Goal Tracking: From Plan to Progress

Supporting person-centered goals and progress



03

Bringing It All Together

Pennsylvania Considerations & Key Takeaways



04

Resources & Questions

Overview

This session explores how Plan of Care and Goal Tracking support different parts of the care journey.

We'll start with the fundamentals of Plan of Care, from Duty Lists to visit documentation, then introduce Goal Tracking and follow a person-centered plan from creation through progress documentation and review.



Who should take this training?

Agency administrators, coordinators, clinical leaders, and IDD/DDD program staff responsible for setting up care plans, coordinating services, or reviewing visit documentation and goal progress.

Objectives

By the end of this session, attendees will be able to:



UNDERSTAND

How Plan of Care and Goal Tracking differ.



EXPLORE

How Plan of Care and Goal Tracking support care documentation.



DOCUMENT

Duties and goal progress during visits.



REVIEW

Goal documentation and progress over time.

Audience Poll

What are you using today?



Plan of Care



Goal Tracking



Both



Neither / Not sure

When Documentation Is Disconnected

More manual work. Less visibility into patient care and progress.



Caregivers document across multiple tools and forms



Data is inconsistent, often incomplete and difficult to report on



Teams spend time chasing documentation gaps

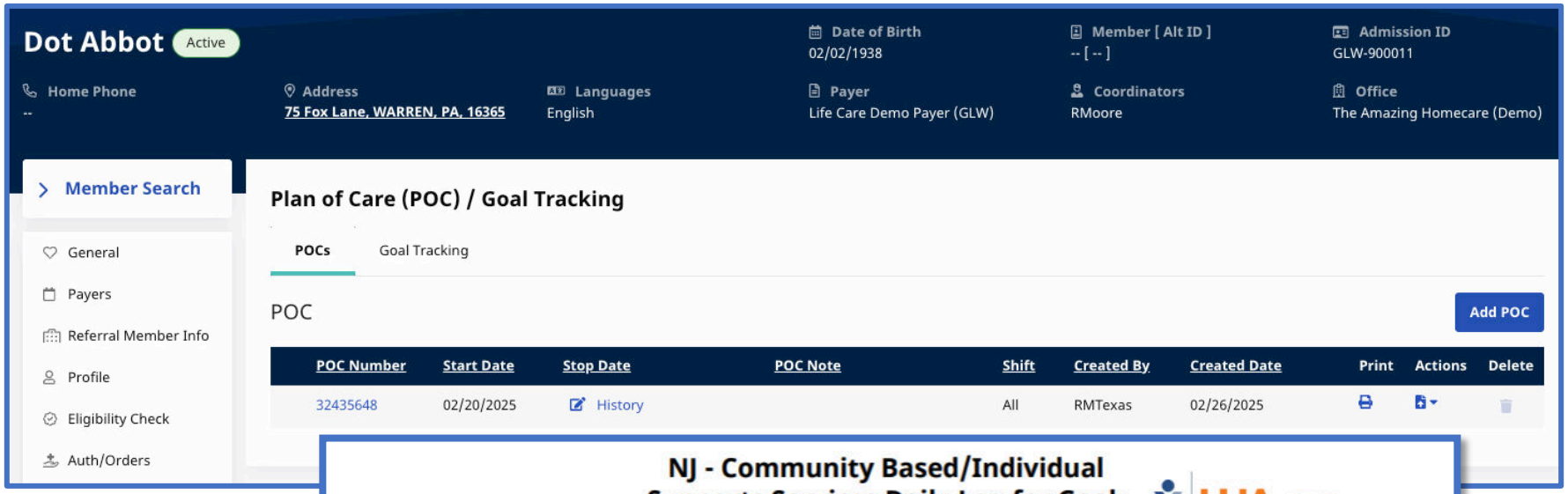


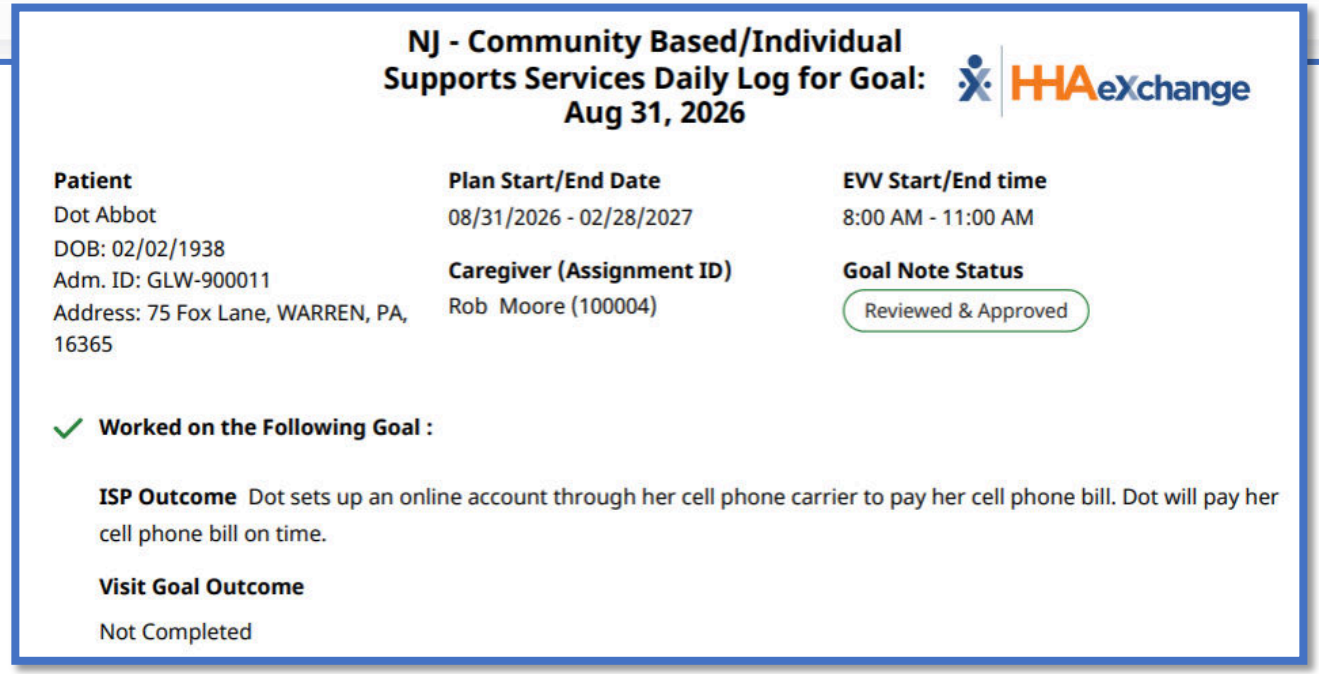
Changes in condition are missed or identified too late

A More Connected Approach

Bring care planning, visit documentation, and progress into a more connected experience.

- Standardize how visits are documented
- Capture structured clinical and goal progress data at the point of care
- Bring documentation back into HHAeXchange for greater visibility





Two Ways We'll Explore This Today



CLINICAL + POC

Supporting care plan delivery and clinical documentation

→ Plan of Care
→ MD/Physician Orders
→ Forms & Assessments
→ HHAeXchange+

AND



GOAL TRACKING

Supporting person-centered goals and progress

→ Person-Centered Plans
→ Goals & Milestones
→ DSP Documentation
→ HHAeXchange+

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From Assessment to Achievement

AGENCY MEMBER POPULATION



IMPROVED OUTCOMES | COMPLIANCE | QUALITY | MEMBER INDEPENDENCE

A closed-loop care management model — person-centered care connecting clinical care and goal tracking



PLAN OF CARE: The Basics

From duties to visit documentation

Supporting Clinical Care at the Point of Care

💊 Mobile Medication Management
- Manage medications during the visit in real-time, improving medication accuracy

📋 Plan of Care (POC) Duties
- Guide caregivers on the care tasks to document during the visit

📄 eMAR (Electronic Medication Administration Record)
- Safe, compliant, and intuitive medication management
- Reduce errors and improve efficiency

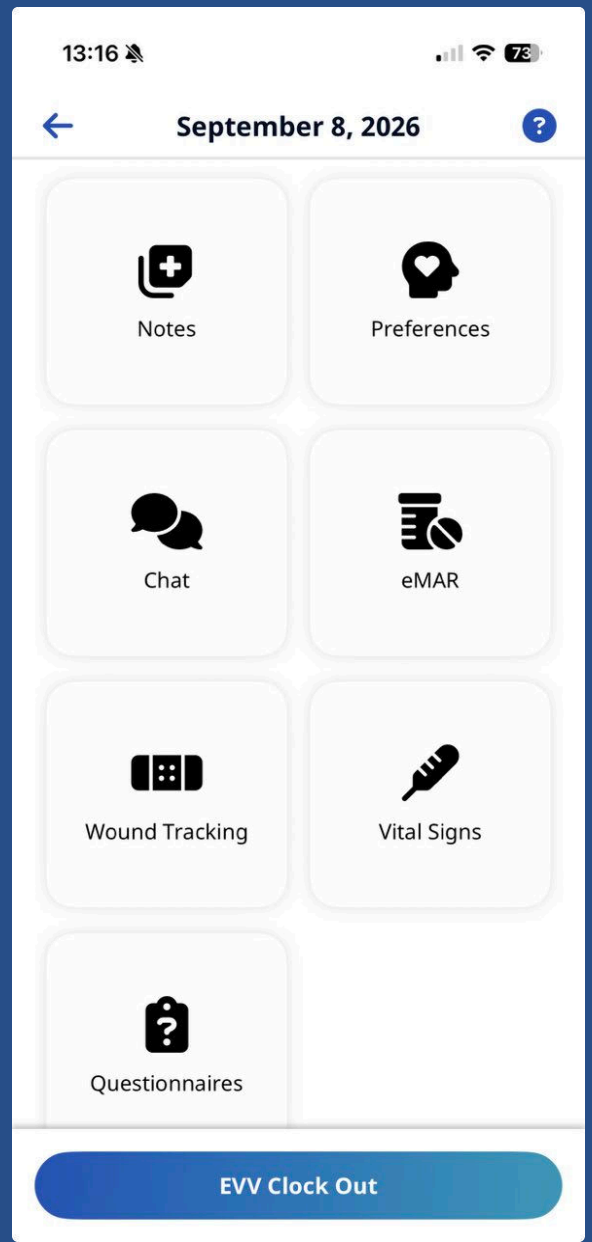
❤️ Vital Signs
- Real-time documentation at the point of care
- Trends & insights to inform clinical decisions

🩹 Wound Tracking
- Streamline image capture and healing progress
- Ensures compliance and continuity of care

📱 HHAeXchange+ Mobile App
- Unified caregiver app experience
- Modern, intuitive, and engaging design

All-in-one visit companion

Review care plans, document care, all in one place



Plan of Care: The Basics



DUTY LIST

What duties are available?



PATIENT POC

What duties apply to this patient?



VISIT DOCUMENTATION

What does the caregiver document?

From the Plan of Care to the Visit

Patient POC – HHAeXchange Portal

New POC

Patient Name: Test CE

Admission ID: 900197

Start Date * *Required* 01/01/2025

Stop Date mm/dd/yyyy

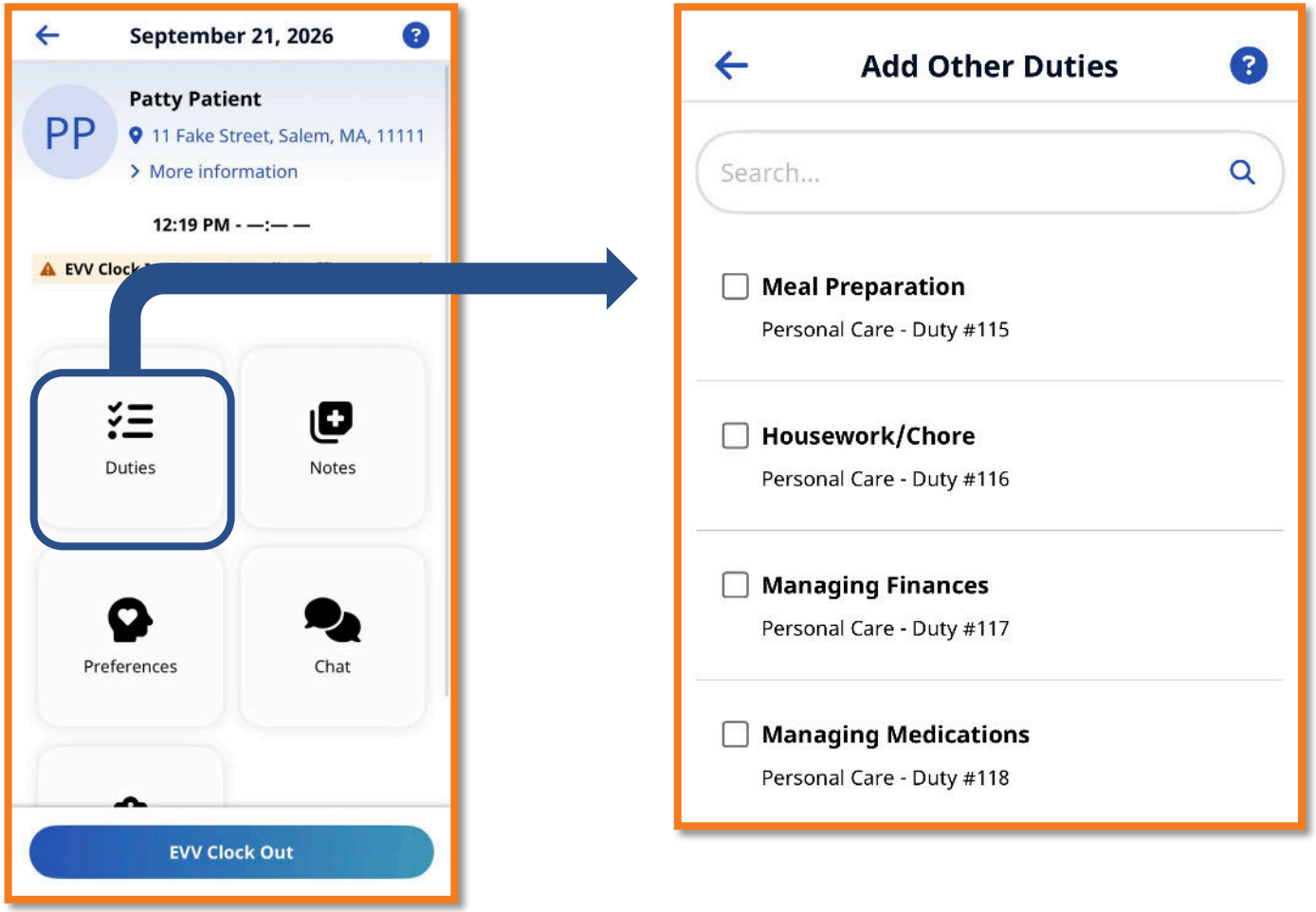
Duties

Category	Task #	Duty	Minutes	As Needed	Times a Week (Min) - (Max)	Days Of Week	Instruction
Personal Care	115	Meal Preparation		☐	-	☐S ☐S ☐M ☐T ☐W ☐T ☐F	
Personal Care	116	Housework/Chore		☐	-	☐S ☐S ☐M ☐T ☐W ☐T ☐F	
Personal Care	117	Managing Finances		☐	-	☐S ☐S ☐M ☐T ☐W ☐T ☐F	
Personal Care	118	Managing Medications		☐	-	☐S ☐S ☐M ☐T ☐W ☐T ☐F	

✓ **Applicable duties are assigned to the patient's Plan of Care.**

From the Plan of Care to the Visit

Caregiver Visit Documentation – HHAeXchange+ Mobile App



✓ **Caregivers document applicable duties during the visit.**

Connecting Orders to the Plan of Care

How ordered care connects to the patient's Plan of Care and visit documentation



Physician Order (MD Order)

This order establishes the clinical care and services being prescribed for the patient.

1



Plan of Care (POC)

Applicable duties are added to the patient 's Plan of Care based on the ordered care.

2



Caregiver Visit Documentation

Caregivers document applicable care during the visit in the **HHAeXchange+ mobile app.**

3

DUTY OR GOAL?

Let's see how much you know.

DUTIES

Housework/Chore

Managing Finances

Meal Preparation

GOALS

Independently prepare a simple meal with minimal support.

Maintain a clean and organized living environment with minimal support.

Independently manage my monthly living expenses.

Beyond the Duty List

Two plans. Different purposes.

PLAN OF CARE (POC)



What needs to be done?

Duties & care tasks

PERSON-CENTERED PLAN (PCP)

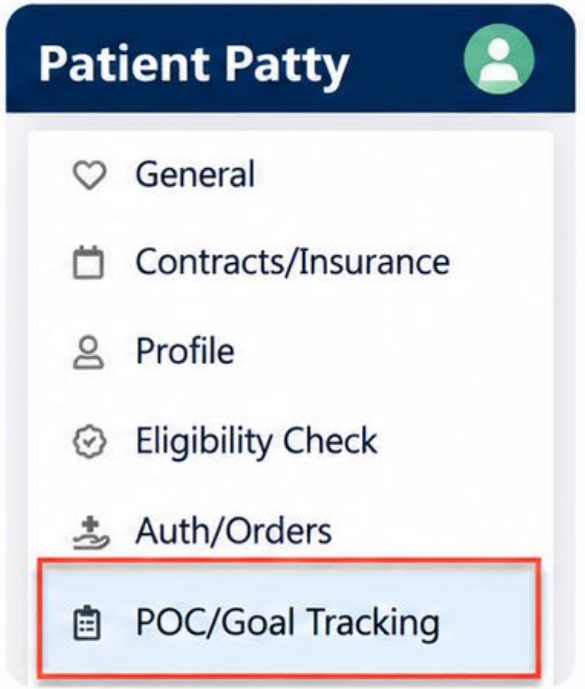


What is the person working toward?

Milestones & goals

PCP is part of **Goal Tracking**

You'll find both in the patient menu.



Feature availability and use vary by agency. Agencies may use Plan of Care, Goal Tracking, both, or neither.



GOAL TRACKING

Supporting person-centered goals and progress

Where progress gets lost

Paper plans, spreadsheets, and disconnected systems make it nearly impossible to see real member progress



Requirements for I/DD and D/DD programs vary by state, payer, and program. Agencies are bogged down by:

- **Hours of setup and review** for every member, every plan, every renewal period
- **Lags between visits and updates,** so goal status is rarely current when it's reviewed
- **Missed warning signs** when at-risk goals aren't visible until it's too late
- **Reporting gaps at audit time** when documentation lives on paper or across disconnected tools

Key features

Four connected capabilities take agencies from paper-based plans to real-time, audit-ready tracking

Goal Note Template Library

Pre-built templates aligned to state and agency workflows — configure once, document consistently everywhere.

Plan Management

Organize plans by theme, individual, or shared caseload from one centralized view.

Goal Creation & Tracking

Define long- and short-term goals, and monitor progress over time.

Visit Documentation

Direct Service Providers log visits mobile-first; agency staff review and approve in place.



How Goal Tracking works

One connected workflow supports goal documentation, review, and progress monitoring

DURING A VISIT — HHAeXchange+ Mobile App

BACK AT THE OFFICE — HHAeXchange Enterprise

1 Visit Documented
by Direct Support Professional

Goal progress is logged mobile-first, right as the visit happens.

2 Note Flows to Plan
Automatic

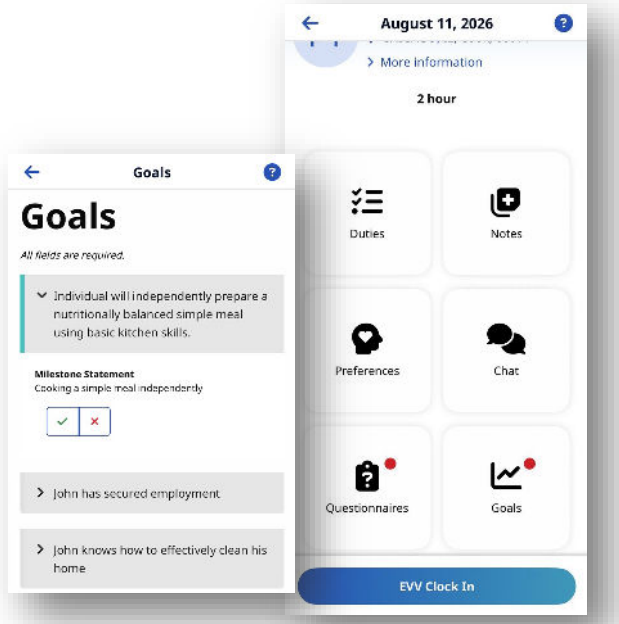
The note lands directly in the member's goal record — no re-keying, no separate system.

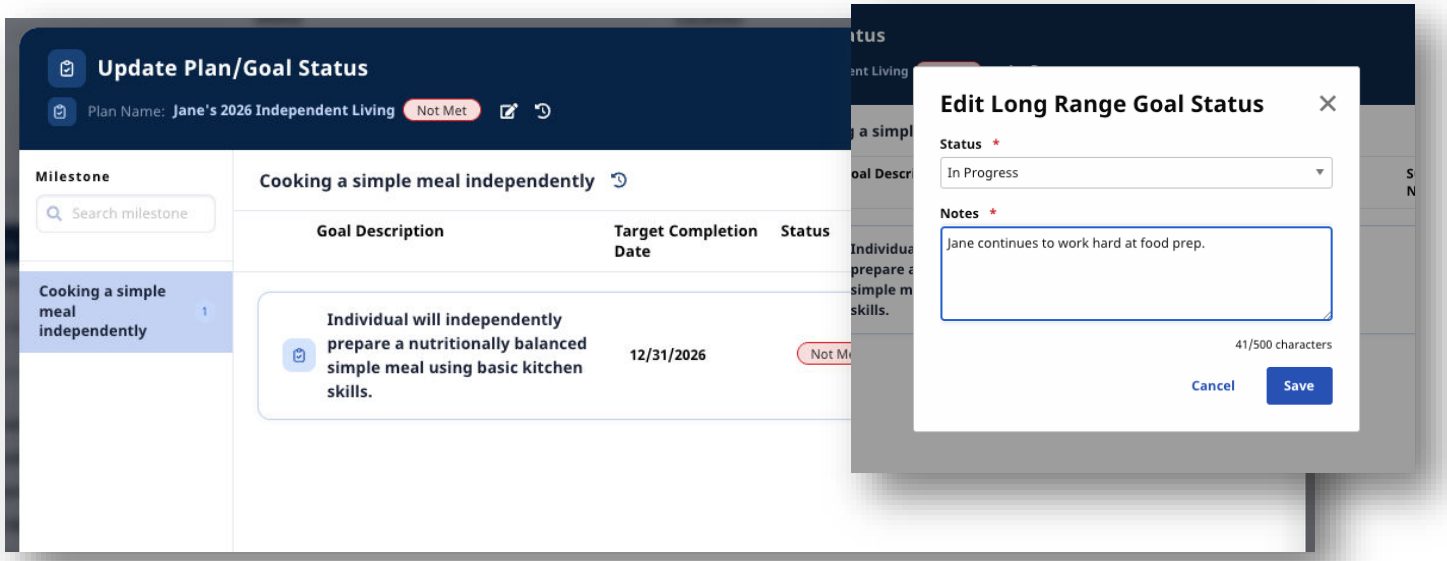
3 Review Notes
by Care Coordinator

Coordinators review, approve, or flag notes for revision, and update goal status.

4 See Goal Progress
in Care Plans

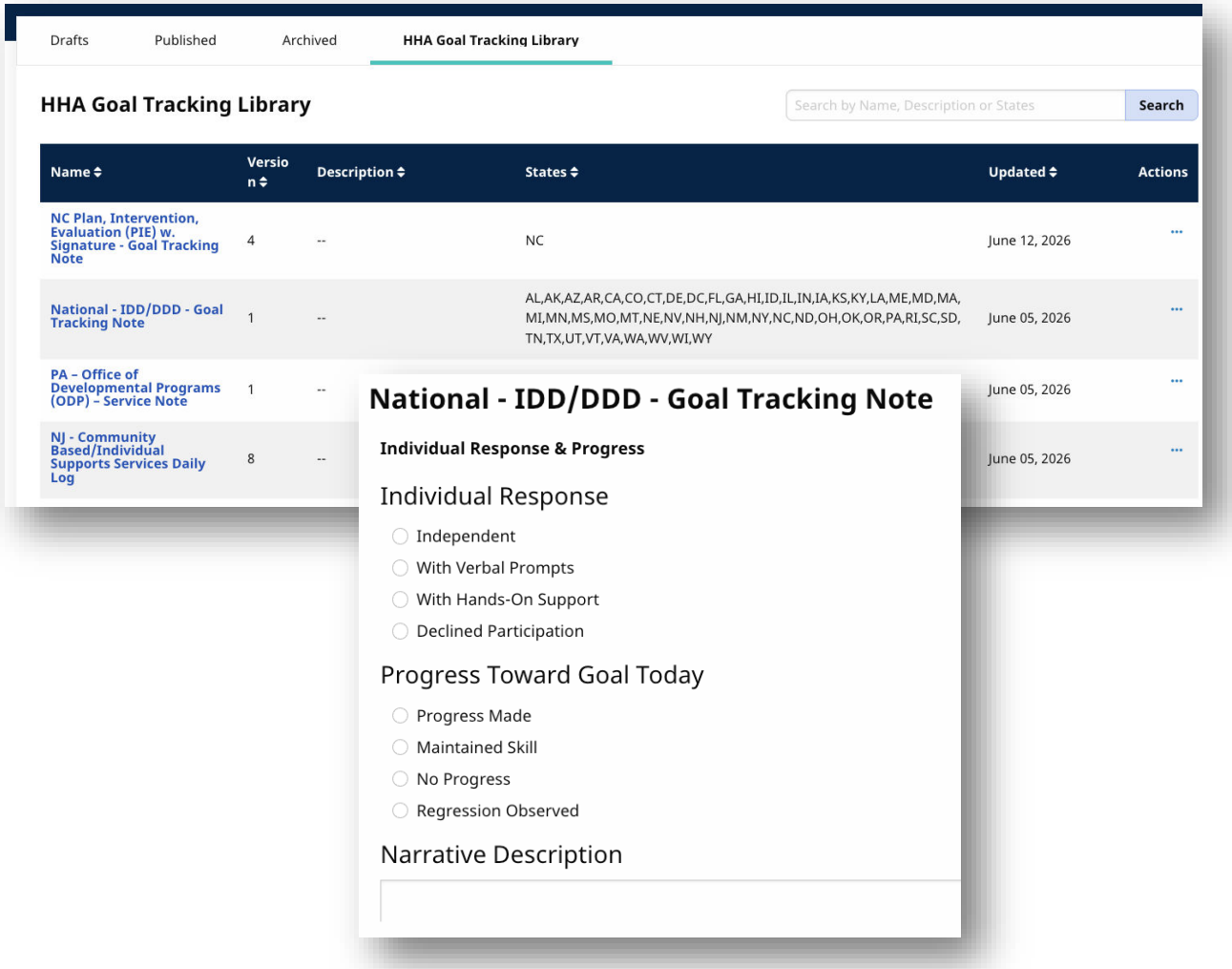
Milestone and plan status update automatically after coordinator review, visible across every member.





Ready-built template library

Pre-built templates aligned to state and agency workflows cut setup time

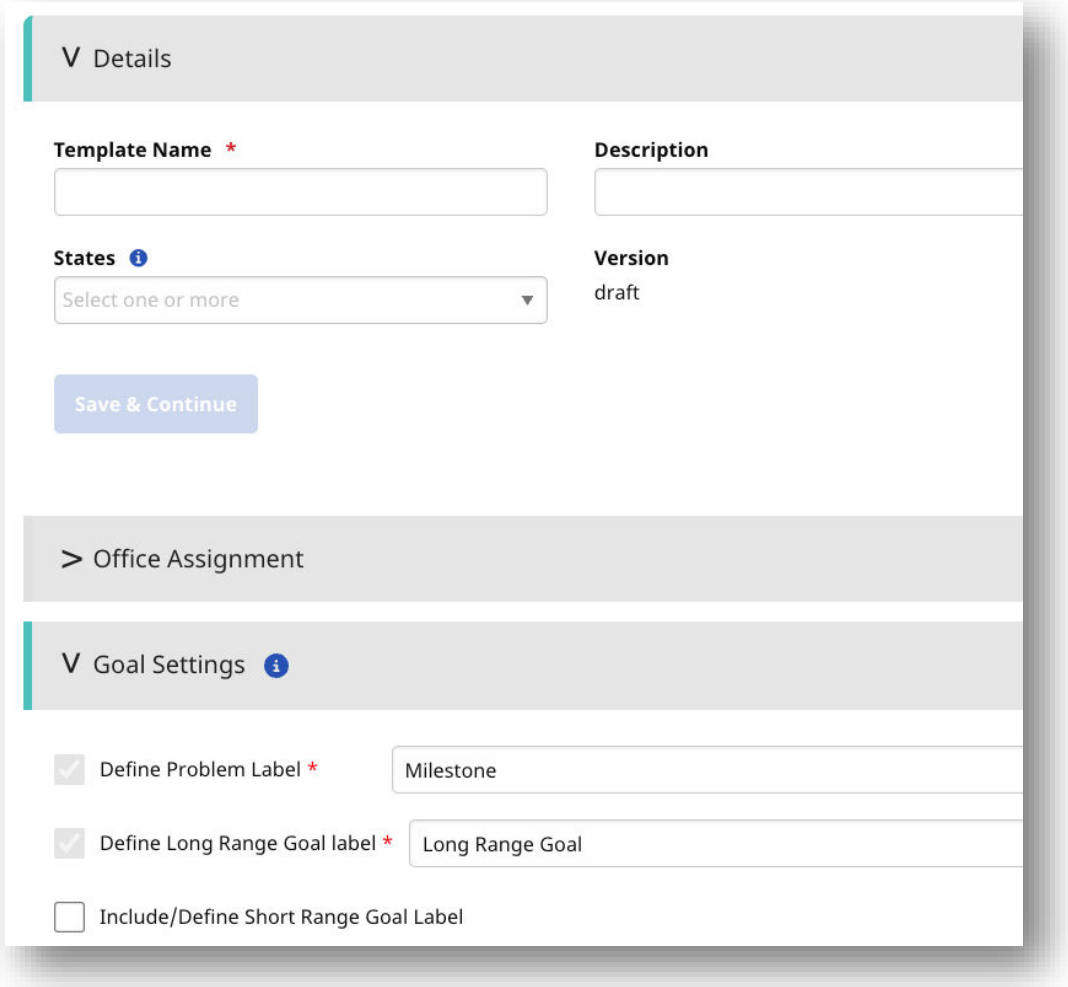


- **Get started quickly** with ready-to-use templates that are pre-built & state-aligned for national I/DD and NC, PA, and NJ programs
- **Create structured, customizable data** in multiple formats: dropdowns, scores, yes/no responses, and free-text narrative
- **Keep documentation standardized** from day one, with required fields consistent across every office

Fully configurable templates

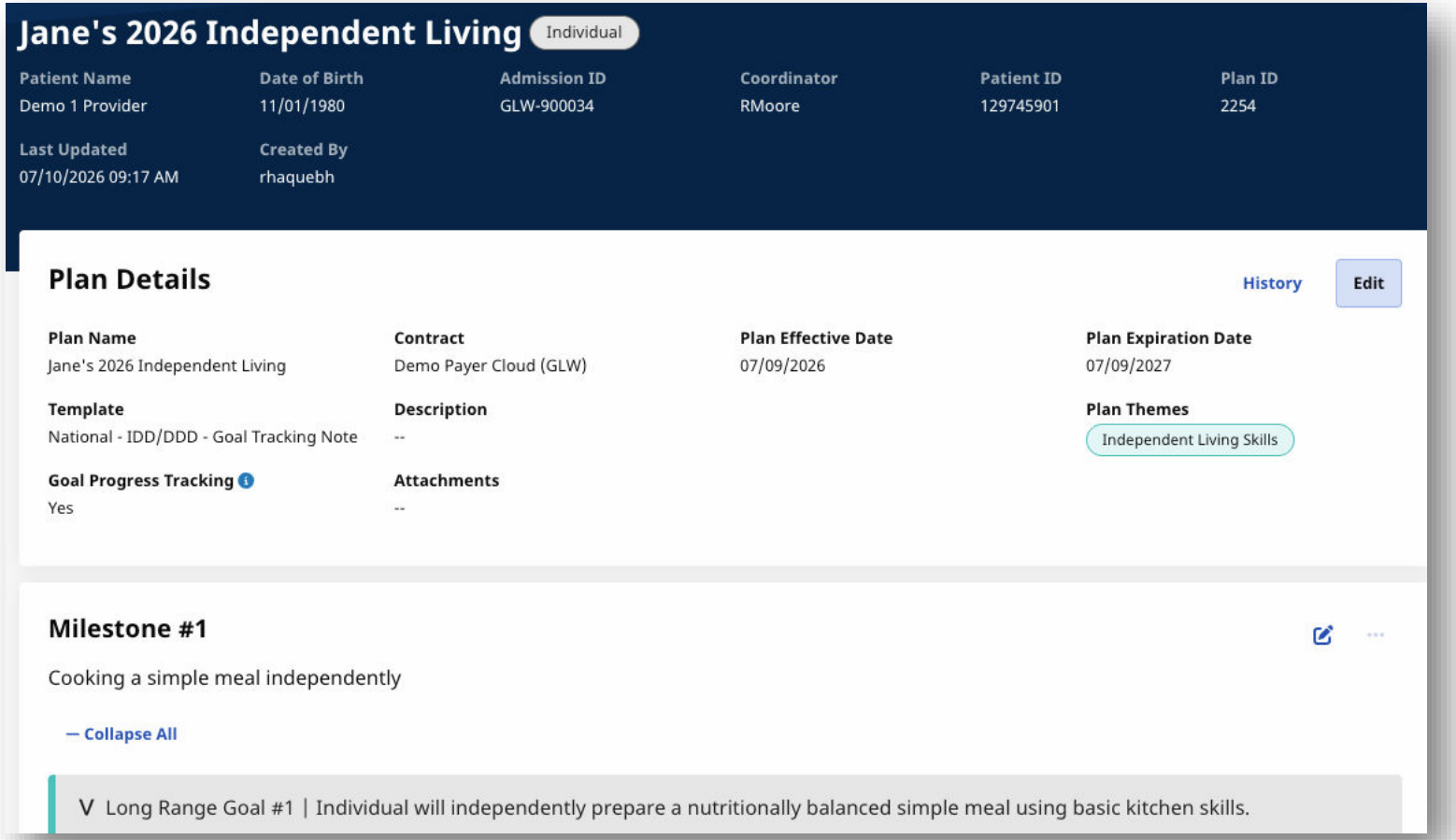
Build templates once and assign them across one office or the entire organization

- **Design for your program** and define labels for Milestones and Long Range Goals that fit your agency's needs
- **Assign with precision** to a single office or every office at once
- **Collect data in the format you need,** combining dropdowns, scores, and free-text fields in the same template



Organized, flexible care planning

Person-Centered Plans stay organized by milestone, goal, and individual so nothing gets lost across a caseload



Create and manage plans for individuals or groups of individuals. Structure plans by:

- **Milestone:** the broad focus area or life domain a plan is built around
- **Long-Range Goal:** the overall outcome the individual is working toward
- **Short-Term Goal:** the measurable steps that get them there

Meet Jordan Taylor

Inside Jordan's Person-Centered Plan.



MILESTONE

Independent Living Skills

LONG-RANGE GOAL

Manage daily household responsibilities and maintain a safe, organized home.

LONG-RANGE GOAL

Manage personal spending and monthly living expenses.

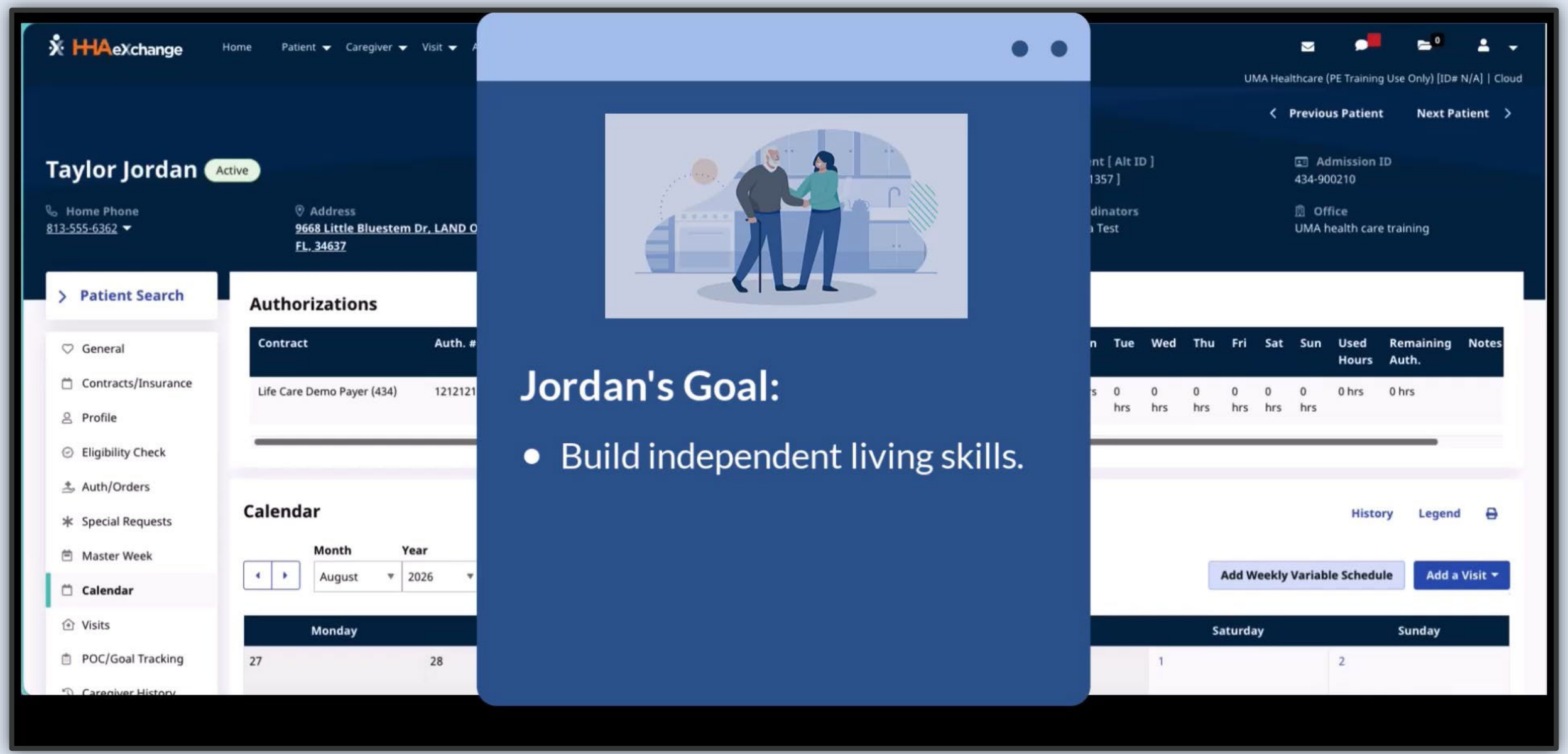
WE'LL FOLLOW JORDAN FROM PLAN TO PROGRESS.

1 PLAN → 2 DOCUMENT → 3 REVIEW & MONITOR

Next, let's build Jordan's plan in Goal Tracking.

DEMO 1 | **PLAN: Create Jordan's Person-Centered Plan**

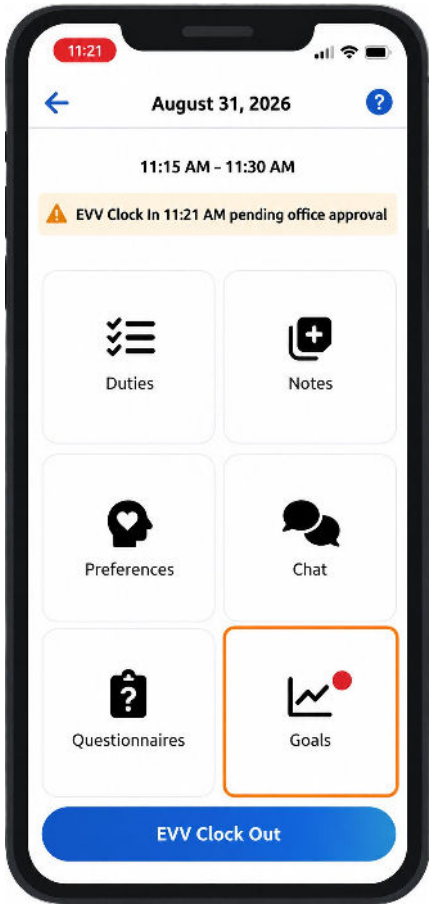
The Admin/Coordinator creates Jordan's Person-Centered Plan in the PCP section of the Portal.



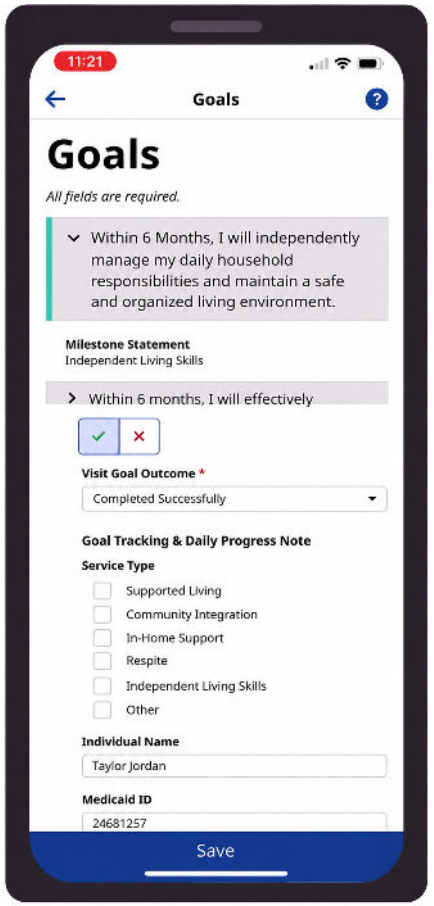
Document Progress During the Visit

DSPs/Caregivers document progress toward Jordan's goals as part of the visit on the mobile app.

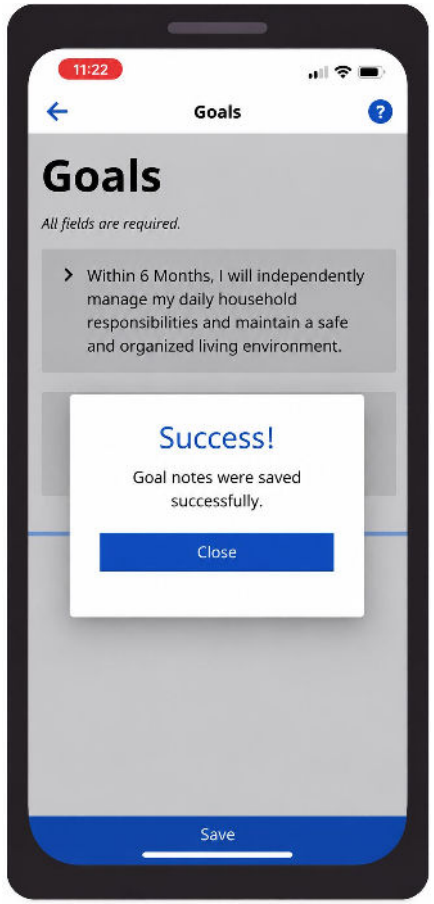
1 OPEN GOALS



2 DOCUMENT PROGRESS



3 SAVE NOTE



View goals for the visit ➡ Complete the required goal documentation ➡ Save the Goal Note

DEMO 2 | **DOCUMENT: Document Jordan's Goal Progress**

DSPs/Caregivers use HHAeXchange+ to review Jordan's goals and document the progress during the visit.

Use the app to review a patient's assigned plan and document how goals are addressed during the visit.



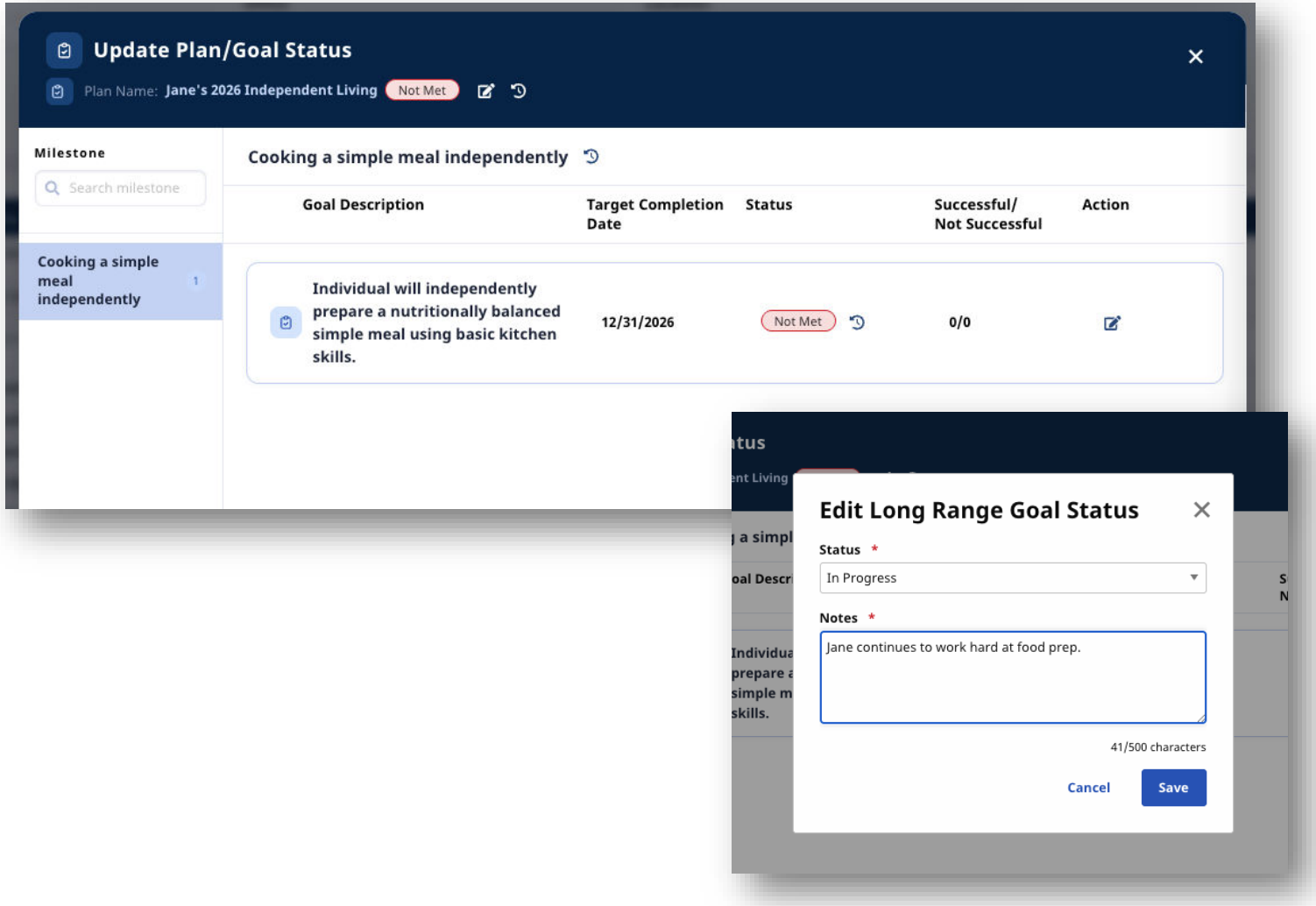
Review & Monitor Goal Progress

Admins/Coordinators review Goal Notes, update goal status, and monitor progress over time.

- **Review Goal Notes**
  documented during visits

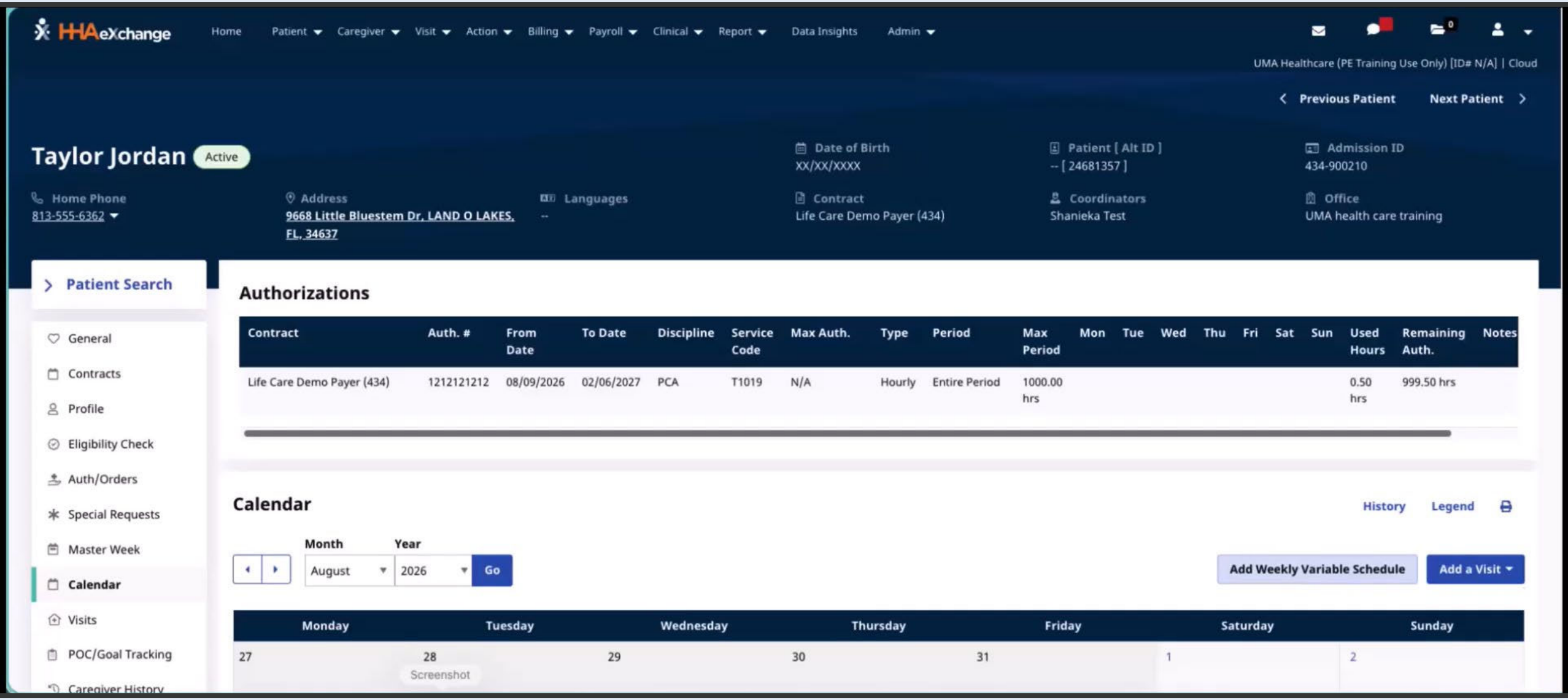
- **Understand where goals stand quickly with defined statuses**
  (In Progress, Not Met, Goal Met, On Hold, or Discontinued)

- **Monitor progress over time**
  with goal history and progress trends



DEMO 3 | **REVIEW & MONITOR: Review Jordan's Goal Progress**

The Admin/Coordinator reviews Jordan's Goal Notes and monitors his progress in the Portal.





Bringing It All Together

Pennsylvania Considerations & Key Takeaways

PUT IT IN ORDER

Quick Knowledge Check: Can you put the Goal Tracking workflow in the correct sequence?



REVIEW & MONITOR

Coordinator reviews Goal Notes, updates the status, and monitors the patient's goal progress in the Portal.



SET UP

Admin sets up and publishes Goal Note Templates in the Goal Tracking Templates area.



DOCUMENT

Caregiver/DSP documents the patient's goal progress during the visit in HHAeXchange+.



PLAN

Coordinator creates the patient's Person-Centered Plan in the Portal using a published template.



What happens first? What comes next?

The Goal Tracking Workflow

Here's how it all comes together.



KEY TAKEAWAYS

✓ PLAN THE CARE

Plan of Care defines the duties that need to be completed and documented during the visit.

✓ TRACK THE PROGRESS

Goal Tracking supports person-centered goals and captures progress toward those goals over time.

✓ KNOW THE DIFFERENCE

Plan of Care documents what was done during the visit. Goal Tracking documents progress toward what the individual is working toward.

Different purposes. Different workflows. Both can support the individual's care journey.



Resources & Questions

Let’s wrap up with helpful resources and questions.

KNOWLEDGE BASE RESOURCES

Continue learning with HHAeXchange Knowledge Base resources.

Goal Tracking Resources

For Goal Tracking setup and workflows

- Goal Tracking overview
- Goal Documentation Templates
- Person-Centered Plans
- Documenting & reviewing Goal Notes

Scan to explore

Explore Goal Tracking

Plan of Care Resources

For Plan of Care questions and workflows

- Creating a Patient POC
- Associating POC to a Visit
- Step-by-step instructions
- Visit documentation

Scan to explore

Explore Plan of Care

Provider Knowledge Base

For additional HHAeXchange resources

- Getting Started resources
- What's New
- Training Videos & documentation
- Additional product guidance

Scan to explore

Provider Knowledge Base

Client Support Portal

A direct path to help when you need it

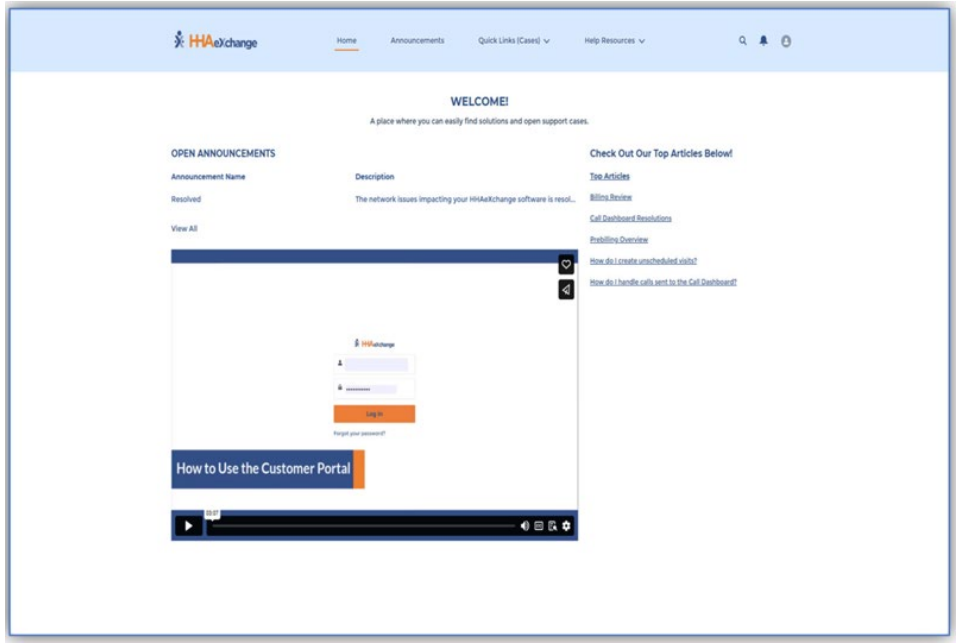
When you need support

Use the Client Support Portal to submit and manage support requests for HHAeXchange.

1. **Open the Client Support Portal**
2. Log in and select the appropriate case option
3. Submit your request and follow its status

Best for onboarding, EVV, billing, technical support, and system questions.

Request help and find support resources in one place.



Scan to access
Client Support Portal

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.

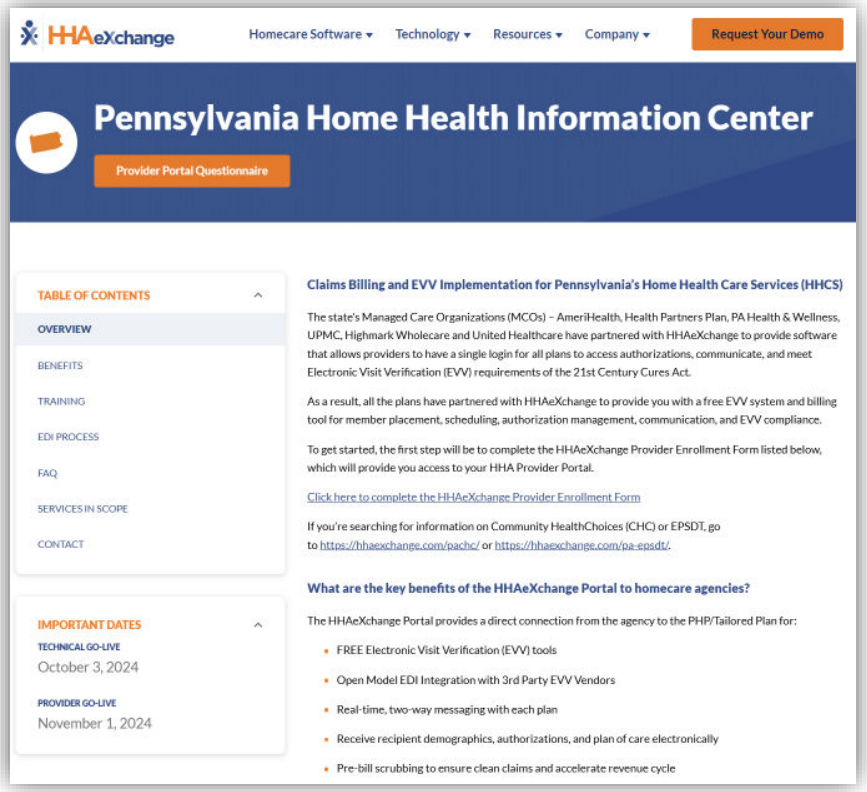
3. **Training & Webinars**

   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.

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

thank you

Please provide us your feedback

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