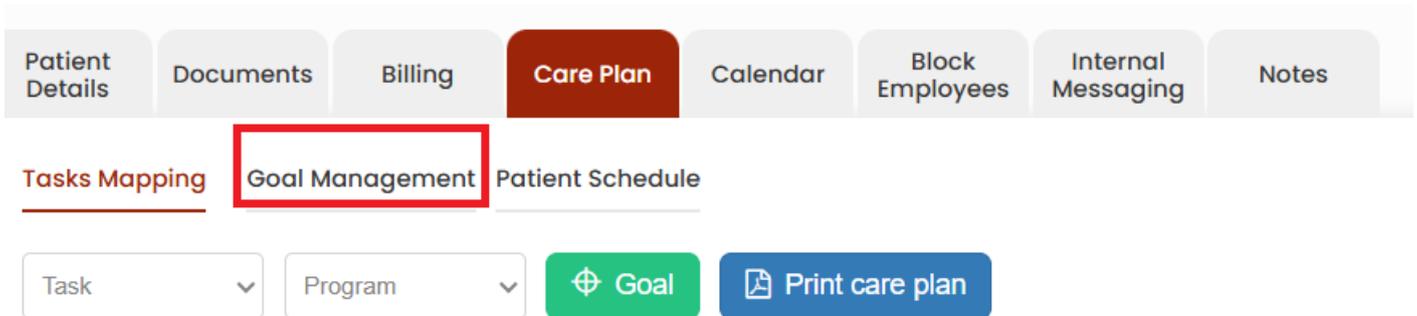


Goal Management

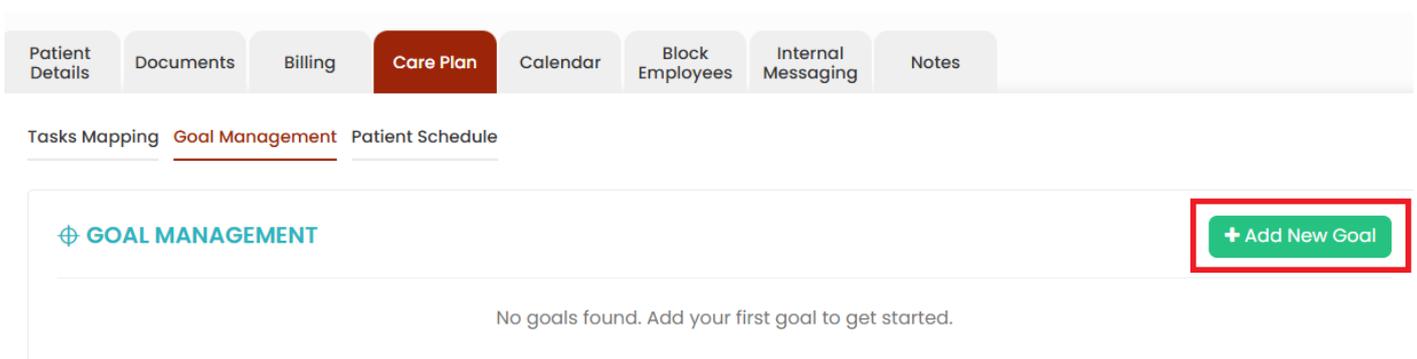
Goal Management is a feature that helps users create, track, and manage individual or program-based goals for clients. It allows setting measurable objectives, assigning responsible staff, monitoring progress, and updating outcomes — ensuring clients receive personalized and outcome-driven care. This feature promotes accountability, documentation, and ongoing evaluation of client progress.

Client List >> Client >> Care Plan >> Goal Management



The screenshot shows a navigation bar with tabs: Patient Details, Documents, Billing, Care Plan (active), Calendar, Block Employees, Internal Messaging, and Notes. Below the tabs are three sub-tabs: Tasks Mapping, Goal Management (highlighted with a red box), and Patient Schedule. At the bottom, there are two dropdown menus for 'Task' and 'Program', a green 'Goal' button with a plus icon, and a blue 'Print care plan' button.

Click the option "Goal Management", the following screen appears to add the Goals for the Services of the patient. Click "Add New Goal" option



The screenshot shows the 'Goal Management' screen. The navigation bar is the same as in the previous screenshot. The sub-tabs are 'Tasks Mapping', 'Goal Management' (active), and 'Patient Schedule'. The main content area has a header 'GOAL MANAGEMENT' with a plus icon. A green button labeled '+ Add New Goal' is highlighted with a red box. Below the button, the text reads: 'No goals found. Add your first goal to get started.'

Now, update the required fields for the Goals and Save the Goal.

Patient Schedule

The patient schedule can be added in the system by using the option +Add Patient Schedule option. Click schedule option under client.

Client >> List >> Select Patient from List >> Care Plan >> Patient Schedule or Client >> Schedule

The patient schedule can be created in the system with Prior Authorization and also without Prior Authorization.

Now lets update the Patient schedule With Prior Authorization. Click on the dropdown option under Contract / PA Details. Select the Authorization details and Click Save & Add Time Slot option.

With PriorAuth  Without PriorAuth 

Contract/PA Details:*

Select (Optional)

AuthCode:4354545 CareType:Personal Care ServiceCode:T1019
StartDate:3/5/2023 12:00:00 AM EndDate:8/31/2023 12:00:00 AM

Add Time Slot

Day* **Start Time*** **End Time***

Anytime ClockIn Used in Scheduling

Notes

'Notes'

Add

ADD PATIENT SCHEDULE

With PriorAuth  Without PriorAuth 

Contract/PA Details:*

4354545

Start Date: 2023/03/05	End Date: 2023/08/31
Care Plan: Personal Care	Service Code: T1019
Total Used Unit:	Allocated Unit:
Used Unit:	Unused Unit:

Save & Add Time Slots

Select days under the Add Time Slot option, update the Start Time and End Time of the Schedule, Check the option Used in Scheduling and Click Add. Now the Time slot will be generated with Days, Time and Care Plan.

Add Time Slot

Day*

Select Day

Start Time*

Start Time

End Time*

End Time

Anytime ClockIn

Used in Scheduling

Notes

'Notes'

Add

Delete Selected

<input type="checkbox"/>	Day ^	Start Time	End Time	Care Type	Used in Scheduling	Anytime ClockIn	Notes	Action
<input type="checkbox"/>	Sunday	09:00 AM	10:10 AM	Personal Care	✓	✗		
<input type="checkbox"/>	Monday	09:00 AM	10:10 AM	Personal Care	✓	✗		
<input type="checkbox"/>	Tuesday	09:00 AM	10:10 AM	Personal Care	✓	✗		
<input type="checkbox"/>	Wednesday	09:00 AM	10:10 AM	Personal Care	✓	✗		

If the Prior Authorization details are not available, the user can follow the above steps and create the Schedule without Prior Authorization for the Patient.

ADD PATIENT SCHEDULE

With PriorAuth  Without PriorAuth 

Referral*
Hernandez, Brown 

Service*
Select 

Billing/Prior Authorization*


Start Date*
mm/dd/yyyy  End By

Save & Add Time Slots

Select days under the Add Time Slot option, update the Start Time and End Time of the Schedule, Check the option Used in Scheduling and Click Add. Now the Time slot will be generated with Days, Time and Care Plan.

With PriorAuth  Without PriorAuth 

Referral* **Service*** **Billing/Prior Authorization***

Start Date*  End By

Add Time Slot

Day* **Start Time*** **End Time***

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Used in Scheduling

Now, the Time Slot for the patient is successfully added with the required Days and Time.

With PriorAuth 
 Without PriorAuth 

Referral*

Hernandez, Brown 

Service*

Personal Care 

Billing/Prior Authorization*



Start Date*

10/01/2023 

End By

Update Schedule

Add Time Slot

Day*

Select Day 

Start Time*

Start Time

End Time*

End Time

Anytime ClockIn

Used in Scheduling

Notes

Notes

Add

Delete Selected

<input type="checkbox"/>	Day 	Start Time	End Time	Service	Used in Scheduling	Anytime ClockIn	Notes	Action
<input type="checkbox"/>	Monday	08:00 AM	10:00 PM	Personal Care	✓	✗		
<input type="checkbox"/>	Tuesday	08:00 AM	10:00 PM	Personal Care	✓	✗		
<input type="checkbox"/>	Wednesday	08:00 AM	10:00 PM	Personal Care	✓	✗		

Showing 1 to 3 of 3 records

Scheduling Patient with Employee

After creating the Timeslot for the patient, the user has to schedule the patient with the Employee. Click Add Patient Schedule option.

Client >> List >> Select Patient from List >> Care Plan >> Patient Schedule

Patient Details Documents Billing/Prior Authorization **Care Plan** Calendar Block Employees Internal Messaging Notes

Tasks Mapping Patient Schedule

Hernandez, Brown

Active Legacy

Start Date	End Date	Service	Authorization	Information	Action
10/01/2023	N/A	Personal Care		Mon, Tue, Wed	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Schedule Now"/>

Showing 1 to 1 of 0 records

Select the Care Type, Start Date and End Date and days of the schedule. Now select the employee from the list to whom the patient has to be scheduled and click the Schedule option.

HERNANDEZ, BROWN

Employee

Employee

Skills

All Skills

Preference

All Preferences

Mile Radius

Mile Radius

Sort

Sort

Search

Employee	Sort				
Toth, Alex	0%	0%	+1833	7	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>
Garcia, William	0%	0%	+0	6	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>
D, David	0%	0%	+922	0	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>

Showing 1 to 3 of 3 records

AuthCode:254874587 ServiceCode:11019
CareType:Personal Care
Allocated: Unallocated:
Available: Remaining:
StartDate:02/02/2023 EndDate:11/05/2023

Patient's Visit Frequency

Patient Payor

Atena

Service*

Personal Care

Authorization Code

254874587

Is Virtual Visit?
beta

Start Date

02/02/20

End Date

11/05/2023

<input type="checkbox"/>	Day	Start Time	End Time	
<input type="checkbox"/>	Monday	08:00 AM	10:00 PM	<input type="button" value="Delete"/>
<input type="checkbox"/>	Tuesday	08:00 AM	10:00 PM	<input type="button" value="Delete"/>
<input type="checkbox"/>	Wednesday	08:00 AM	10:00 PM	<input type="button" value="Delete"/>

Patient On Hold

The patient has been successfully scheduled with the employee and the Schedule has been created.

Reassign Employee for the patient

The Employee assigned for the patient can be reassigned with different employee in the system by using the Schedule Now option.

Client >> Schedule

Select the patient from the list and click Schedule now option. When we click the day of the schedule, we can see the employee name who has been assigned to the patient for the day.

CLARK, SAMUEL

Employee Skills Preference Mile Radius Sort

Employee	Sort				
D, David		0%	0%	+2476	0
Garcia, William		0%	0%	+2228	0
Toth, Alex		0%	0%	+396	0

Showing 1 to 3 of 3 records

AuthCode:091201983103821 ServiceCode:11019
 CareType:Personal Care
 Allocated: Unallocated:
 Available: Remaining:
 StartDate:09/20/2023 EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor Service*

Authorization Code Is Virtual Visit? beta

Start Date End Date

<input type="checkbox"/>	Day	Start Time	End Time	
<input type="checkbox"/>	Monday	06:00 AM	08:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Wednesday	06:00 AM	08:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Thursday	06:00 AM	08:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Friday	06:00 AM	08:00 PM	<input type="checkbox"/>

View Assigned Employees

Name	Mobile Number
Alex Toth	(347) 480-9560

Patient On Hold

Now select the start date and end date of the schedule for which the employee has to be reassigned. Also click the check box to select the day for reassigning the employee and click unassign employee option on the right side of the day.

The below screen appears, click yes continue option. The employee has been unassigned for the selected date range for that particular day.

CLARK, SAMUEL

Employee Skills Preference Mile Radius Sort

Employee	Sort				
D, David		0%	0%	+2476	0
Garcia, William		0%	0%	+2228	0
Toth, Alex		0%	0%	+396	0

Showing 1 to 3 of 3 records

undefined

Are you sure?

AuthCode:091201983103821 ServiceCode:11019
 CareType:Personal Care
 Allocated: Unallocated:
 Available: Remaining:
 StartDate:09/20/2023 EndDate:01/24/2024

Patient's Visit Frequency

Patient Payor Service*

Authorization Code Is Virtual Visit? beta

Start Date End Date

<input type="checkbox"/>	Day	Start Time	End Time	
<input checked="" type="checkbox"/>	Monday	06:00 AM	08:00 PM	<input type="button" value="Unassign"/>
<input type="checkbox"/>	Wednesday	06:00 AM	08:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Thursday	06:00 AM	08:00 PM	<input type="checkbox"/>
<input type="checkbox"/>	Friday	06:00 AM	08:00 PM	<input type="checkbox"/>

Patient On Hold

After the employee has been unassigned, click the check box for the day and click Schedule option on the right side of the employee who has to be scheduled for the patient.

Employee: Skills: Preference: Mile Radius: Sort:

Employee	Sort	
D, David	<input type="button" value="+ Schedule"/> <input type="button" value="- Reschedule"/>	
Garcia, William	<input type="button" value="+ Schedule"/> <input type="button" value="- Reschedule"/>	
Toth, Alex	<input type="button" value="+ Schedule"/> <input type="button" value="- Reschedule"/>	

Showing 1 to 3 of 3 records

Schedule(s) created successfully

AuthCode:091201983103821 ServiceCode:11019
 CareType:Personal Care
 Allocated: Unallocated:
 Available: Remaining:
 StartDate:09/20/2023 EndDate:01/24/2024

Patient's Visit Frequency ⓘ

Patient Payor: Service*:

Authorization Code: Is Virtual Visit? beta

Start Date: End Date:

<input type="checkbox"/>	Day	Start Time	End Time	
<input type="checkbox"/>	Monday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>
<input checked="" type="checkbox"/>	Wednesday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>
<input type="checkbox"/>	Thursday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>
<input type="checkbox"/>	Friday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>

Patient On Hold

Patient on Hold

The user can keep the patient on hold for the day by using the option +Patient Hold.

Employee: Skills: Preference: Mile Radius: Sort:

Employee	Sort	
D, David	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>	
Garcia, William	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>	
Toth, Alex	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>	

Showing 1 to 3 of 3 records

AuthCode:091201983103821 ServiceCode:11019
 CareType:Personal Care
 Allocated: Unallocated:
 Available: Remaining:
 StartDate:09/20/2023 EndDate:01/24/2024

Patient's Visit Frequency ⓘ

Patient Payor: Service*:

Authorization Code: Is Virtual Visit? beta

Start Date: End Date:

<input type="checkbox"/>	Day	Start Time	End Time	
<input checked="" type="checkbox"/>	Monday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>
<input type="checkbox"/>	Wednesday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>
<input type="checkbox"/>	Thursday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>
<input type="checkbox"/>	Friday	06:00 AM	08:00 PM	<input type="button" value="🗑"/>

Patient On Hold

Now Click +Patient Hold option, the following screen appears, update the start date, end date, reason for hold and click Save option. The notification will be sent to the employee to hold the patient for the day.

CLARK, SAMUEL

Employee

Skills

Preference

Employee	Sort
D, David	0% 0% +2476 ↕ 0
Garcia, William	0% 0% +2228 ↕ 0
Toth, Alex	0% 0% +396 ↕ 0

Showing 1 to 3 of 3 records

Patient Hold

Are you sure you want to put this patient on hold for selected dates? This action will delete Patient's Visits for selected dates.

Start Date* **End Date**

Hold Reason*

Notify Employee

AuthCode:091201983103821 **ServiceCode:**T1019
CareType:Personal Care
Allocated: **Unallocated:**
Available: **Remaining:**
StartDate:09/20/2023 **EndDate:**01/24/2024

Patient's Visit Frequency

Patient Payor **Service***

Authorization Code **Is Virtual Visit?** beta

Start Date **End Date**

<input type="checkbox"/>	Day	Start Time	End Time	
<input checked="" type="checkbox"/>	Monday	06:00 AM	08:00 PM	
<input checked="" type="checkbox"/>	Wednesday	06:00 AM	08:00 PM	
<input type="checkbox"/>	Thursday	06:00 AM	08:00 PM	
<input type="checkbox"/>	Friday	06:00 AM	08:00 PM	

Patient On Hold

The user can see days on the screen for which the patient is on hold.

CLARK, SAMUEL

Employee

Skills

Preference

Mile Radius

Sort

Employee	Sort	
D, David	0% 0% +2476 ↕ 0	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>
Garcia, William	0% 0% +2228 ↕ 0	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>
Toth, Alex	0% 0% +396 ↕ 0	<input type="button" value="+ Schedule"/> <input type="button" value="+ Reschedule"/>

Showing 1 to 3 of 3 records

AuthCode:091201983103821 **ServiceCode:**T1019
CareType:Personal Care
Allocated: **Unallocated:**
Available: **Remaining:**
StartDate:09/20/2023 **EndDate:**01/24/2024

Patient's Visit Frequency

Patient Payor **Service***

Authorization Code **Is Virtual Visit?** beta

Start Date **End Date**

<input type="checkbox"/>	Day	Start Time	End Time	
<input checked="" type="checkbox"/>	Monday	06:00 AM	08:00 PM	
<input type="checkbox"/>	Wednesday	06:00 AM	08:00 PM	
<input type="checkbox"/>	Thursday	06:00 AM	08:00 PM	
<input type="checkbox"/>	Friday	06:00 AM	08:00 PM	

Patient On Hold

#	Start Date	End Date	
1	10/16/2023	10/16/2023	<input checked="" type="checkbox"/> ✕

Virtual Visit

[Client >> Schedule](#)

For creating the Virtual Visit of the patient with employee, follow these steps.

- Click the schedule now option.

- Select the Patient Payor, Service and check the option Is Virtual Visit.
- Select the days of the schedule for Virtual Visit.
- Click Schedule option for the required employee in the list.

CLARK, SAMUEL

Employee: Skills: Preference: Mile Radius: Sort:

Employee	Sort				
Garcia, William					
Toth, Alex					
D, David					

Showing 1 to 3 of 3 records

Patient's Visit Frequency

Patient Payor: Service:

Authorization Code: **Is Virtual Visit?** beta

Start Date: End Date:

<input type="checkbox"/>	Day	Start Time	End Time	
<input type="checkbox"/>	Sunday	07:00 AM	02:00 PM	
<input type="checkbox"/>	Monday	07:00 AM	02:00 PM	
<input type="checkbox"/>	Tuesday	07:00 AM	02:00 PM	
<input checked="" type="checkbox"/>	Wednesday	07:00 AM	02:00 PM	
<input type="checkbox"/>	Thursday	07:00 AM	02:00 PM	
<input type="checkbox"/>	Thursday	03:00 PM	10:00 PM	
<input checked="" type="checkbox"/>	Friday	07:00 AM	02:00 PM	
<input type="checkbox"/>	Friday	03:00 PM	10:00 PM	
<input type="checkbox"/>	Saturday	07:00 AM	02:00 PM	

Delete Schedule

Client >> Schedule

Click the Delete button before Schedule Now option to Delete the schedules created with wrong information.

Tasks Mapping Patient Schedule

New Legacy

Start Date	End Date	Service	Authorization	Information	Action
09/01/2023	N/A	Respite Care		Sun, Mon, Tue, Wed, Thu, Fri, Sat, Thu, Fri	<input type="button" value="Schedule Now"/>
09/20/2023	01/24/2024	Personal Care	091201983103821		<input type="button" value="Schedule Now"/>
04/29/2022	N/A	Personal Care		Sun, Mon	<input type="button" value="Schedule Now"/>

The Deleted schedules can be viewed under Deleted option on the screen.

Patient Details Documents Billing/Prior Authorization **Care Plan** Calendar Block Employees Internal Messaging Notes

Tasks Mapping Patient Schedule

Clark, Samuel

New Legacy

Delete

Start Date	End Date	Service	Authorization	Information	Action
04/29/2022	10/31/2023	Personal Care		Sun, Mon	<input type="button" value="Active"/> <input type="button" value="Schedule Now"/>

The user can also Activate the Deleted schedules by using the option Active.

Patient Details Documents Billing/Prior Authorization **Care Plan** Calendar Block Employees Internal Messaging Notes

Tasks Mapping Patient Schedule

Clark, Samuel

New Legacy

Delete

Start Date	End Date	Service	Authorization	Information	Action
04/29/2022	10/31/2023	Personal Care		Sun, Mon	<input type="button" value="Active"/> <input type="button" value="Schedule Now"/>

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