



EPSDT Pennsylvania System User Training Webinar

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Cures Act Mandated EVV

Section 12006 of the 21st Century Cures Act requires states to implement an EVV system for Medicaid-funded Personal Care Services (PCS) by January 1, 2019 and for Home Health Care Services (HHCS) by January 1, 2023. Federal legislation delayed penalties for PCS implementation until January 1, 2020.

The six data elements
Required to be collected
to meet the CURES Act
EVV Requirement



GFE extended deadline to 1/1/2021 for PCS. Providers are expected to use the system for confirming visits 11/1/2020 to be ready for the 1/1/21 mandate.

What is HHAeXchange?

HHAeXchange is the premiere Homecare Management Software company for the Medicaid LTSS population. We are the leaders in connecting payers and homecare agencies to enable more collaboration, communication, and workflow efficiencies. Through the use of the HHAeXchange portal, our goal is to make working with the MCOs easy and efficient.

How We're Helping the MCOs Meet the Cures Act Mandate

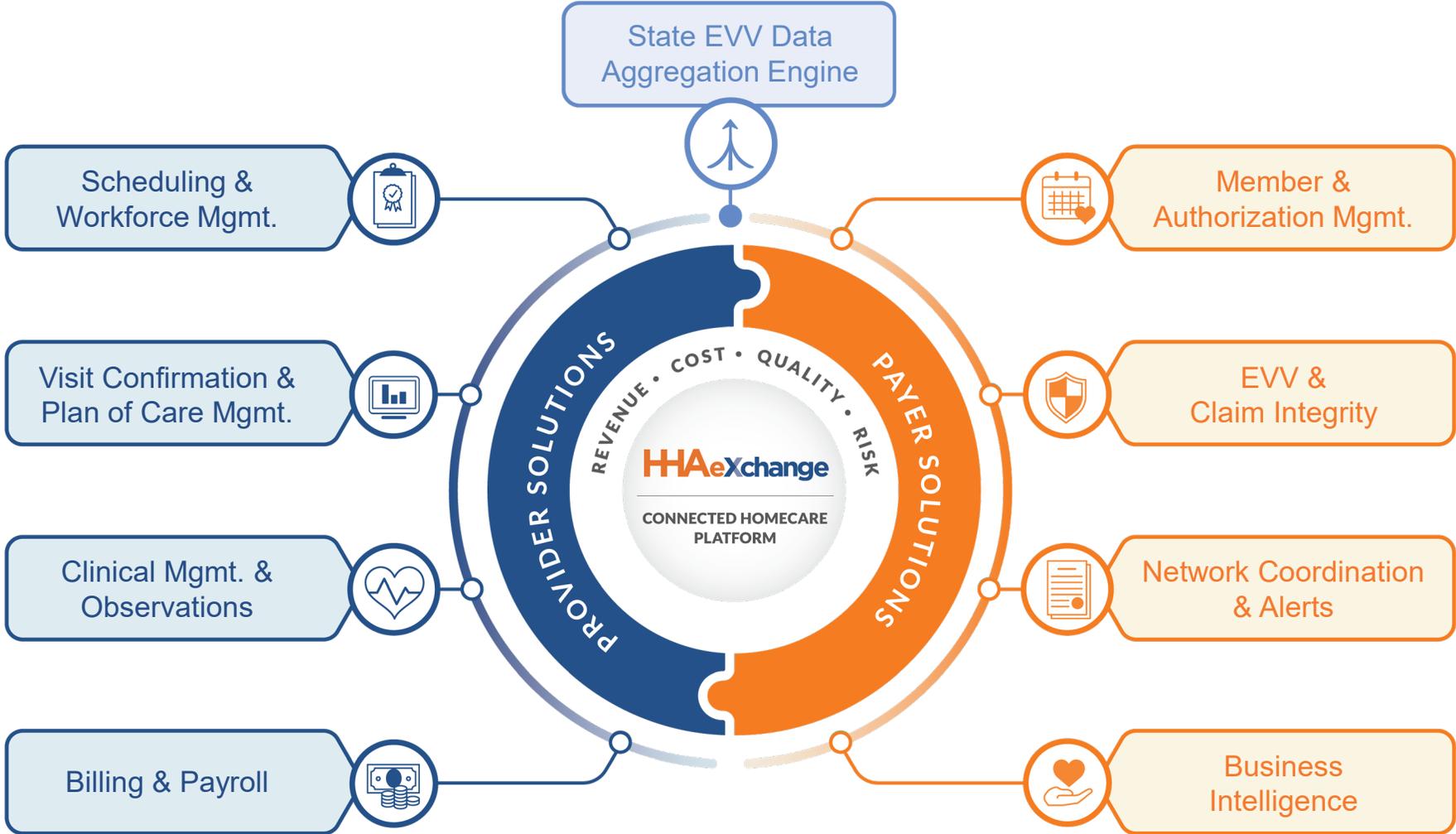
- Industry-leading scheduling and billing platform for back-office users and EVV confirmations
- Easy-to-use point-of-care visit confirmation tools for caregivers

What does the HHAeXchange Portal provide to homecare agencies?

- Electronic case placement and authorization transfer
- Efficient schedule and visit management
- Real-time two-way messaging with the MCOs
- Free EVV solution for time & attendance and duty tracking
- Electronic billing

Integrated Solutions for Homecare Stakeholders: Providers, Payers, States

Enabling enhanced economic performance and improved compliance across the homecare ecosystem



Pennsylvania MCO Footprint



- Integrated all 3 of the Community Health Choices MCOs for all 75 services provided
- Over 1,300 providers use HHA to record visits and submit 837s
- 90,000+ members supported and serviced through HHAeXchange portal
- More than 170k caregivers registered and confirming visits
- **Currently implementing for EPSDT:** UPMC, Amerihealth Caritas, Keystone First, and United HealthCare (UHC)
- Health Partners Plans (HPP) will also be utilizing HHAeXchange, but this rollout will be at a later date



Provider Landscape

- Provider Types:
 - **Existing Provider:** Provider already uses HHAeXchange for EVV and member management of CHC members.
 - **New Provider:** Provider does not use HHAeXchange and does not already have their own EVV system. New providers can use HHAeXchange free of charge to manage the participating MCO's members.
 - **EDI (Electronic Data Interchange):** Providers who have their own EVV system, separate from HHAeXchange.
 - EDI providers may continue to work in their own system for scheduling, recording visits, and billing, but the data will be sent to HHAeXchange via a file from the alternate EVV vendor.
 - If you have your own EVV system, you can reach out to edisupport@hhaexchange.com at any time to begin the integration process.

HHAeXchange at a Glance



Member Management

- Member Demographics
- Authorizations
- Service Details (if applicable)



Real-Time, Two-Way Communication with Multiple MCOs

Visit Entry Options

- Quick Visit Entry
- HHAeXchange EVV
- Open Model EDI



Billing & Reporting

- Eliminate Denials with Pre-Bill Scrubbing
- Bill Multiple MCOs for Confirmed Visits





Provider Services in Scope

- S9122 - Home health aide or certified nurse assistant
- G0156 - home health/hospice aide in home health or hospice settings
 - This code applies only to United HealthCare

Top 6 Takeaways from Today

- **Authorizations**
 - How to review authorizations sent from the MCOs in HHAeXchange
- **Communication**
 - How to communicate with the MCOs using HHAeXchange's Notes
- **Visit Confirmation**
 - How to add or review visits in HHAeXchange
- **Invoicing / Billing**
 - How to review invoices and bill in HHAeXchange
- **Credentials**
 - How to create User Names and passwords in HHAeXchange
- **Support**
 - How to access Quick Start Guides and Support Articles

Over the Next Few Weeks

- PA Provider Information Center
 - <https://hhaexchange.com/pa-epsdt/>
- Receive Provider Portal Credentials
- Create Credentials for Users
- Prepare for go-live on **November 1st, 2020**

HHaEXchange Provider Information Center

<https://hhaexchange.com/PACHC>



Pennsylvania EPSDT Information Center

HHaEXchange is the premiere Homecare Management Software company for the Medicaid LTSS population. We are the leaders in connecting payers and homecare agency providers to enable more collaboration, communication, and workflow efficiencies. Through the use of the HHaEXchange Portal, our goal is to make working with Pennsylvania EPSDT program easy and efficient.

Provider Information Center – Lunch & Learn Webinar

- **Post Go-Live: Lunch & Learn Webinars**
 - 30-minute, single-topic sessions (2x per week)
 - Topics such as **Provider Quick Start Guide, Communications and Notes, EVV Call Dashboard**, etc., are just a few of many that will be covered
 - Visit the Provider Information Center (Training Page) after Go-Live for dates on upcoming webinars

System Support

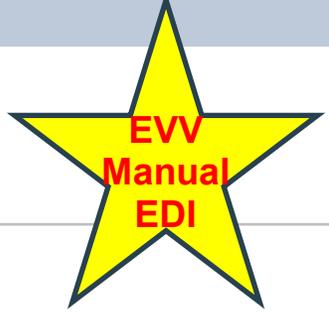
- Super Users
- HHAeXchange Support Center: Documentation Catalog
 - Process Guides
 - Job Aids
 - Reference Material
- Provider Info Center <https://hhaexchange.com/PACHC/>
 - Register for live training
 - Review recorded trainings on demand
 - Review FAQs

HH AeXchange User Training Agenda

PART 1

- HH AeXchange System Introduction
- Member Management
- Communications (Notes) – **New Communication Experience**

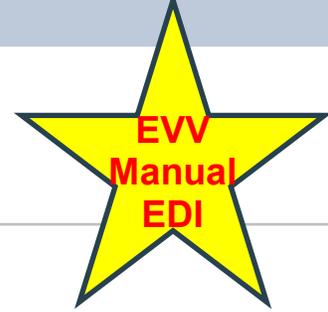
HH AeXchange User Training Agenda



PART 2 – Based on Provider's Method of Visit Entry/Management

- **HH AeXchange EVV**
(Free EVV System Provided by MCOs)
- **Manual Visit Entry**
(Visit Quick Entry Function – Directly into HH AeXchange)
- **EDI**
(Electronic Data Interchange – 3rd Party EVV/Agency Management System)

HHAEExchange User Training Agenda

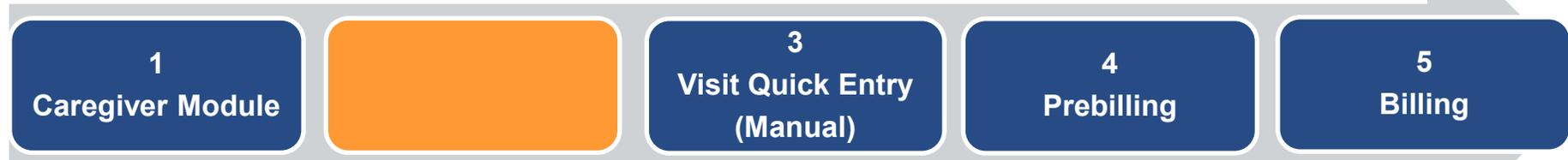


PART 2 – Based on Provider’s Method of Visit Entry/Management

- **HHAEExchange EVV**



- **Manual Visit Entry**



- **EDI**



HHAEExchange User Training Agenda

PART 3

- Pre-Billing/Billing
- Reporting
- Administration



HH AeXchange System Introduction

HHaEXchange System Introduction

- **HHaEXchange System Nomenclature**
 - *Member* = Patient = Recipient = Consumer = Participant=Client
 - *Caregiver* = Attendant = Aide
 - *Provider* = Agency = Vendor
 - *MCO* = Payer = “Plan”
- **Log In Process** (www.hhaexchange.com → CLIENT LOGIN)
- **Home Module**
 - Landing Page
 - Reviewing Pending Placements and Communications with MCOs



Member Management (Placement)

Member Management – Placement Alerts

- New Placement Request (Email)

This is an automated notification email. Do NOT reply.

A new placement request has been sent to you with the following details.

Payer Name :
 Admission ID :
 Start of service :
 Cut of time :
 Address :
 Frequency :SAT:0-0, SUN:0-0, MON:0-0, TUE:0-0, WED:0-0, THU:0-0, FRI:0-0
 Special Requests :Request Gender: Male , Primary Language: English, Secondary Language: Spanish
 Discharge Date :

HHA Exchange
 This message and any accompanying attachments contain information from Homecare Software Solutions LLC which is confidential or privileged. The information is intended to be for the use of the individual or entity named above. If you are not the intended recipient, be aware that any disclosure, copying, distribution or use of the contents of this information is prohibited. If you have received this e-mail in error, please notify the sender immediately by reply e-mail and destroy all copies of the original message.

- New Placement Request (Home → Pending Placements)

The screenshot shows the HHAeXchange web application interface. At the top, there is a navigation menu with options: Home, Member, Caregiver, Visit, Action, Billing, Report, Admin. A notification bell icon shows 3 alerts. The user is logged in as 'Welcome - PenSup4 (Pennsylvania Home2Home Demo (Do Not Use))'. The page title is 'Home'.

Below the navigation, there are tabs for 'Link Communications' and 'System Notifications'. A search filter is present with 'Member Team' set to 'All' and 'Coordinator' set to 'All'. A note states: 'Note: The "Coordinator" filter is only applicable for Events and Notes section.'

The main content area is divided into two sections: 'Pending Placements' and 'Notes'.

Pending Placements Table:

Admission ID	Start Date	Stop Date	Frequency	Service Cat.	Service Type	Request Sent At	Status	Cut Off Time	MCO Name
191827467	09/01/2018			Home Health	HHA	10/17/2018 12:47:39 PM	Pending	12/25/2018 23:26:39 PM	ACPA CHC Training

Notes Section:

Page 1 of 1 |

<input type="checkbox"/> From	Created Date	Member Name	Reason	Note	MCO Name	Actions
<input type="checkbox"/> KEYSTONE FIRST CHC DEMO (DO NOT USE)	10/17/2018 01:08:23 PM	N/A	Communication	Can you please provide the IDs and DOB of the 3 members for which you are awaiting placement?	ACPA CHC Training	Reply Close

Close

Member Management – Placement Review

- Review Placement

- Click on [Admission ID](#) to display *Placement Window*
- Review Member Info
 - General: Demographics (Masked)
 - Special Requests: Gender, Language, Notes

Pending Placements	
Admission ID	Sta
191827467	09,

Member Info

Placement Type: Home Health

General

* Placement Acceptance Window: 99999 (Mins)

Member Name: XXXXX Member ID: XXXXX

Admission ID: 191827467 Address: XXXXX

Phone: XXXXX

* Service Start Date: 9/1/2018 Zip Code: 19019

MCO Name: ACPA CHC Training Alt. Member ID:

Discharge Date: Frequency:

Gender: Female

Authorization

* Service Category: Home Health * Service Type: HHA

* Authorization Number: P000908765 * Service Code: T2025 Service Code Type: Hourly (Mutual + Member Shift Overlap)

* From Date: 09/01/2018 * To Date: 02/28/2019 Authorization Type: Entire Period

Diagnosis Code #1: Diagnosis Code #2: Diagnosis Code #3:

Hours

Set Masterweek Now:

* Hours per Auth. Period: 962 Additional Rules:

* Member Team: Select * Coordinator: Select Accept Request More Time Accept And Print Select Deny

Service Location Code: N/A

Member Management – Placement Acceptance

- Accept Placement

The screenshot shows a horizontal form with several fields and buttons. A red arrow points to the 'Member Team' dropdown menu. The form includes the following elements:

- * Member Team: Default (dropdown)
- * Coordinator: Default (dropdown)
- Service Location Code: N/A (dropdown)
- Accept (button)
- Request More Time (button)
- Accept And Print (button)
- Select (dropdown)
- Deny (button)

- Select **Member Team** and **Coordinator**
- Select Button at bottom of *Placement Window*
 - **Accept**
 - **Request More Time**
 - **Deny** (Must select **Reason Code** for denial)
- Placement is cleared from *Pending Placements* on Home Page
- Member Module → Profile Page (*Status = Active*)

Member Management – Placement Queue

- Action → Pending Placement Queue
- 4 Placement Queue Sections
 - Pending
 - Default *Cut off* Time (per MCO)
 - Approaching *Cut Off* (in red)
 - Removed from Queue after *Cut Off*
 - Staffed with Temp Caregiver
 - Staffed
 - Accepted with no Masterweek
---- (homecare only ; not for SCE)

Pending Placement Queue										
Member Team: All Search										
Total Pending: 1 Total Accepted: 0 Total Staffed: 0 Total Accepted with no Masterweek: 1										
Pending										Page 1 of 1
Admission ID	Start Date	Stop Date	Frequency	Service Cat.	Service Type	Request Sent At	Status	Cut Off Time	MCO Name	
191827467	09/01/2018			Home Health	HHA	10/17/2018 12:47:39 PM	Pending	12/25/2018 11:26:39 PM	ACPA CHC Training	
Staffed with Temp Caregiver										
No Accepted Member Found										
Staffed										
No Staffed Member Found										
Accepted with No Masterweek										
Name	Admission ID	Start Date	Stop Date	Frequency	Time Accepted	Payer Name				
HUNTER, EUGENE	7428428262	09/26/2018			09/25/2018 17:00:11 PM	UPMC Health Plan SE Demo				

Member Management – Member Profile

- **Member Module – Index of Pages**
 - General
 - Provider Information
 - Status History
 - Member Notes
 - Profile (Demographics)
 - Authorization
- **Primary Statuses** (*Pending, Active*)

Member General	
General	Member Info - Active Name: Cl MCO Name: Pe
Profile	
Authorization	
Special Requests	
Master Week	
Calendar	
Visits	
POC	

Member Management – View Info

- Member Module – Profile Page *(from MCO Demographic Info)*

<p>General</p> <p>Profile</p> <p>Authorization</p> <p>Insurance</p> <p>Special Requests</p> <p>Master Week</p> <p>Calendar</p> <p>Visits</p> <p>POC</p> <p>Clinical</p> <p>Info</p> <hr/> <p>Search</p> <p>First Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>Admission ID: <input type="text"/></p> <p><input type="button" value="Go"/></p>	<p>Member Info - Active</p> <p>Name: Schultz Gewendolin Nurse: Frequency: Payer Coordinator:</p> <p>Payer Name: ACPA CHC Training Admission ID: 191827467 Member ID: DOB: XX/XX/XXXX</p>			
	<p>Profile</p>			
	<p>Demographics History</p> <p>First Name: Gewendolin Middle Name: _____</p> <p>Last Name: Schultz Member ID: _____</p> <p>Gender: Female DOB: XX/XX/XXXX</p> <p>Medicaid Number: _____</p>			
	<p>Address History</p> <p>Street 1: XXX Street 2: XXX</p> <p>City: Philadelphia State: PA</p> <p>Zip: 19019 Cross Street: _____</p> <p>Home Phone: 215-789-9182 Description: _____</p> <p>Phone 2: _____ Description: _____</p> <p>Phone 3: _____</p>			
	<p>Billing/Service Rate Address</p> <p>Address 1: XXX Address 2: XXX</p> <p>State: _____ County: _____</p> <p>City: _____ Zip Code: _____</p>			
	<p>Emergency Contact Information History</p> <p>Name: _____ Relationship: _____</p> <p>Address: _____ Phone 1: _____</p> <p>Phone 2: _____</p> <p>Name: _____ Relationship: _____</p> <p>Address: _____ Phone 1: _____</p> <p>Phone 2: _____</p>			
	<p>Emergency Preparedness (Payer)</p> <p>Payer Priority Code: _____ Payer TAL: _____</p>			

Member Management – Authorizations

- **Process (Timing varies by MCO)**
 - Authorization with Provider matched to Member in HHAX
 - HHAX sends back confirmed placement file which confirms provider acceptance
 - Review Authorization as necessary (Member → Authorization Page)

[General](#)

[Profile](#)

[Authorization](#)

[Special Requests](#)

[Calendar](#)

[Visits](#)

[POC](#)

Search

First Name:

Last Name:

Admission ID:

Member Info - Active

Name: Schultz Gewendolin **Nurse:** **Frequency:** **MCO Coordinator:**

MCO Name: ACPA CHC Training **Admission ID:** 191827467 **Member ID:** **DOB:** XX/XX/XXXX

Authorization

Auth. #	From Date	To Date	Service Type	Service Code	Authorization Type	MCO	Service Category	Notes	Visits/ Invoice
P000908765	09/01/2018	02/28/2019	HHA	T2025	Entire Period Entire Period Hours: 962.00	ACPA CHC Training	Home Health		Update



Communication & Notes

Communications – Overview (Types)

- **Member Notes**
(Communication between Provider and MCO related to a Member)
- **Automated Notes**
(System Generated Notes, such as *Authorization* and *Status Change*)
- **MCO Communications – Message Center**
(Communications between Provider and MCO *not* related to a Member)

Member Notes - Review

- Home Page → Notes (Status = *Open*)

<u>Notes</u>	<u>Date</u>	<u>From</u>	<u>To</u>	<u>Note</u>	<u>Reason</u>	<u>Status</u>
	10/17/2018 5:09:44 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Can you please provide the IDs and DOB of the 3 members for which you are awaiting placement?	Communication	Closed
	10/17/2018 5:02:15 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Schedule might change based on patient's preference.	Communication	Open

- Member → General Page → Notes
(All Statuses – *Open* and *Closed*)

Member General

Member Info - Active

Name: HUNTER EUGENE
Payer Name: UPMC Health Plan Demo

Nurse:
Admission ID: 7428428262

Frequency:
Member ID: 7428428262

Payer Coordinator:
DOB: XX/XX/XXXX

Notes

<u>Date</u>	<u>From</u>	<u>To</u>	<u>Note</u>	<u>Reason</u>	<u>Status</u>	<u>New</u>
10/17/2018 5:09:44 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Can you please provide the IDs and DOB of the 3 members for which you are awaiting placement?	Communication	Closed	Close Reply Print
10/17/2018 5:09:44 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Schedule might change based on patient's preference.	Communication	Open	Close Reply Print

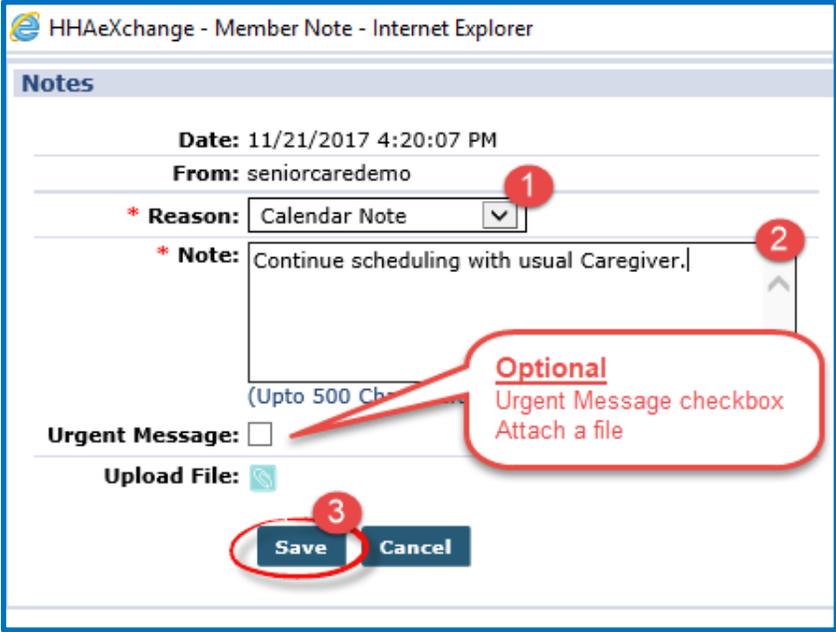
Member Notes – Create and Respond

- **Create (New)** - *See next slide for details*
 - From Member → General Page only
 - Member → General Page → Notes Section → 
- **Reply**
 - From Home: Home → Notes → [Reply](#)
 - From Member: Member → General Page → Notes Section → [Reply](#)
- **Close**
 - From Home: Home → Notes → +  (checkbox to left of Note)
(Once closed, Notes will be removed from Home Page)
 - From Member: Member → General Page → Notes Section → [Close](#)

Member Notes – Create Notes

Member → General Page → Notes Section → 

- **Complete Notes Window**
 - Select Reason
 - Enter Note
 - Upload File (if necessary)  → 
 - Click  (Note Status = *Open*)
- **Note Reason Values**
 - Varies By MCO



HHAExchange - Member Note - Internet Explorer

Notes

Date: 11/21/2017 4:20:07 PM
From: seniorcaredemo

* Reason: Calendar Note

* Note: Continue scheduling with usual Caregiver.

(Upto 500 Ch

Urgent Message:

Upload File: 

Save Cancel

Optional
Urgent Message checkbox
Attach a file

Member Notes – Print

- **Print Individual Notes** (send to non-system users)
 -  to obtain hardcopy of Individual Note (PDF)
- **Print Notes Report** (Report → Other Reports → Member General Notes)

HHAeXchange Member General Notes Page 1 of 8																					
Report Date: 12/07/2017 10:42																					
From Date: 11/1/2017 MCO : Health Plan - Training Linked Notes From: Health Plan - Training Reason: All Member General Notes: Yes Visit Caregiver Comments: No						To Date: 12/7/2017 Member Name: All Linked Notes To: All Calendar Notes: No Missed Visit Notes: No Coordinator : All															
<table border="1" style="width: 100%;"> <thead> <tr> <th colspan="2">Type of Notes Values:</th> </tr> </thead> <tbody> <tr> <td>PG</td> <td>Member General Notes</td> </tr> <tr> <td>CN</td> <td>Calendar Notes</td> </tr> <tr> <td>VCC</td> <td>Visit Caregiver Comments</td> </tr> <tr> <td>MVN</td> <td>Missed Visit Notes</td> </tr> </tbody> </table>												Type of Notes Values:		PG	Member General Notes	CN	Calendar Notes	VCC	Visit Caregiver Comments	MVN	Missed Visit Notes
Type of Notes Values:																					
PG	Member General Notes																				
CN	Calendar Notes																				
VCC	Visit Caregiver Comments																				
MVN	Missed Visit Notes																				
Status	Created Date	Created By	Adm ID	Member Name Caregiver Name	MCO	Note	Reason	Closed By	Closed Date	To Name	Type of Notes										
Closed	12/05/2017 09:32	upmc (UPMC Health Plan - Training)	01614661301	VOLZ VICKIE	UPMC Health Plan - Training	Authorization will be corrected within 3 business days. 30 hours per week can be used	Authorization Edit	riversupport (Riverwood Demo)	12/05/2017	Riverwood Demo	PG										
Closed	11/17/2017 09:45	upmc (UPMC Health Plan - Training)	01614661401	SAGER AMY	UPMC Health Plan - Training	Yes. Correct is 373 Main St, Altoona	Authorization Edit	riversupport (Riverwood Demo)	11/17/2017	Riverwood Demo	PG										

MCO Communications – Review/Create

- Search/Review
 - From Action → MCO Communication

MCO Communications							
MCO:	All	Message Type:	All	Status:	All	Reason:	All
From Date:		To Date:		Search			
New Search Results (4) Page 1 of 1							
MCO	Created Date	Reason	Note	Status	Close	Reply	
Pennsylvania Top MCO - PA	10/08/2018 11:46:47 AM	Communication	Please note that the updated billing process takes effect in the next cycle.	Open			
Pennsylvania Top MCO - PA	10/08/2018 11:49:59 AM	Communication	Action required on pending Placements.	Open			
Pennsylvania Top MCO - PA	10/16/2018 12:39:56 PM	Calendar Note	Schedule coordination for the month is in progress.	Open			
Pennsylvania Top MCO - PA	10/16/2018 04:24:01 PM	Communication	Thanks for the quick placement acceptance. It has helped us facilitate our census	Open	Close	Reply	

 = Inbound Note

 = Outbound Note

 = Attachment

- Create ()
 - Reason *(by MCO)*

Notes

Date: 9/25/2018 5:12:49 PM
 From: Pennsylvania Top MCO - PA

* Reason:

* Note:
 (Upto 500 Characters)

Urgent Message:

Upload File: 

Save **Cancel**

MCO Communications – Print

Perform Search → Right-click to Print → Print Page(s)

MCO Communications

MCO: All Message Type: All
From Date: To Date: Search

Search Results (4)

MCO	Created Date	Reason	Note
Pennsylvania Top MCO - PA	10/08/2018 11:46:47 AM	Communication	Please note that the updated b
Pennsylvania Top MCO - PA	10/08/2018 11:45:06 AM	Communication	Action required on pending Plac
Pennsylvania Top MCO - PA	10/16/2018 12:39:56 PM	Calendar Note	Schedule coordination for the n
Pennsylvania Top MCO - PA	10/16/2018 04:24:01 PM	Communication	Thanks for the quick placement

Context menu options: Back, Encoding, Print..., Print preview..., Refresh, Append to Existing PDF, Convert to Adobe PDF, Export to Microsoft Excel, Send to OneNote, Properties.

Print

Select Printer

- Adobe PDF
- DCP-L5650DN on MDC02
- Fax
- Microsoft Print to PDF
- Microsoft XPS Document
- Send to OneNote 2016

Status: Ready Location: Print to file Preferences Find Printer...

Page Range: All Selection Current Page Number of copies: 1 Collate 1 2 3

Enter either a single page number or a single page range. For example, 5-12

Print Cancel Apply

MCO Communications

MCO: All Message Type: All Status: All Reason: All
From Date: To Date: Search

Search Results (4)

MCO	Created Date	Reason	Note	Status	Close	Reply
Pennsylvania Top MCO - PA	10/08/2018 11:46:47 AM	Communication	Please note that the updated billing process takes effect on the next cycle.	Open	Close	Reply
Pennsylvania Top MCO - PA	10/08/2018 11:45:06 AM	Communication	Action required on pending Placements.	Open	Close	Reply
Pennsylvania Top MCO - PA	10/16/2018 12:39:56 PM	Calendar Note	Schedule coordination for the month is in progress.	Open	Close	Reply
Pennsylvania Top MCO - PA	10/16/2018 04:24:01 PM	Communication	Thanks for the quick placement acceptance. It has helped us facilitate our census	Open	Close	Reply

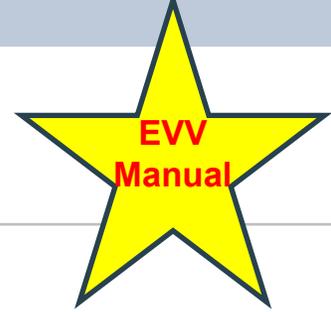
https://app.hhaexchange.com/STD0600010011/Action/PayerCommunications.aspx?Versi... 11/28/2017

Page 1 of 1



Caregiver Management (EVV & Visit Quick Entry)

Caregiver – *EVV* and *Manual* only



- HHAeXchange EVV



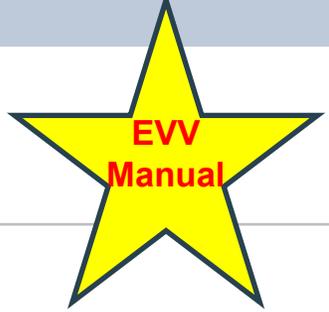
- Manual Visit Entry



- EDI



Adding Caregivers – Data Entry



- New Caregiver
- Required Fields
 - Demographics
(Employment Type)
 - Address
 - Emergency
- Save
 - Creates Profile

HHAeXchange Home Member **Caregiver** Visit Action Billing Report Admin Support Center | Logout
Welcome - riversupport (Riverwood Demo)

New Caregiver Search Caregiver

Demographics

* First Name:
* Last Name:
* Gender:
* Caregiver Code:
* Status:
* SSN#:
(e.g. xxx-xx-xxxx)
* Primary Patient Team: ⓘ

Middle Name:
* Initials:
* DOB:
Alt. Caregiver Code:
Caregiver Mobile ID: ⓘ
Mobile Device ID: ⓘ

PCA HHA RN
 LPN PT OT
 ST MSW HSK
 HMK NT RT
* Employment Type: PA HCSS CNA
 APC SCM SCI
 ILST PBIS RESP
 ESC SDP CBSA
 Other (Non Skilled) Other (Skilled)

Rehire: Rehire Date:

Address

Street 1:
City:
Zip:
Phone 2: - -

Street 2:
State:
Home Phone: - -
Phone 3: - -

Emergency

Name:
Address:
Phone 2: - -

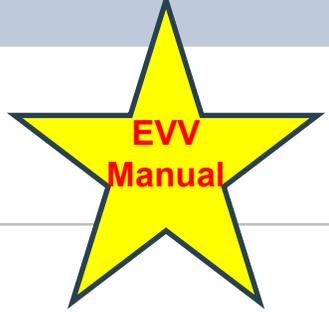
Relationship:
Phone 1: - -

Name:
Address:
Phone 2: - -

Relationship:
Phone 1: - -

Save Cancel

Caregiver – Profile Overview



- Demographics
- Employment
- Address
- Emergency

Caregiver Info

Profile (selected)
Restrictions
Compliance
Visits
Calendar

Caregiver Info
Name: Brown Mike Caregiver Code: 1005 DOB: XX/XX/XXXX Discipline: RN, LPN, PT, OT, ST

Profile

Demographics [History](#)

* First Name: Mike	Middle Name:
* Last Name: Brown	* Initials: BM
* Gender: MALE	* DOB: XX/XX/XXXX
* Caregiver Code: 1005	Time & Att. PIN: 100005
Alt. Caregiver Code:	* Status: Active
* SSN#: XXX-XX-XXXX	Start Date:
Rehire: No Rehire Date:	* Employment Type: RN, LPN, PT, OT, ST
<i>i</i> Caregiver Mobile ID:	<i>i</i> Mobile Device ID:
Ethnicity:	* Hiring Status: Employee
* Primary Patient Team: Default	

Employment Info [History](#)

HHA/PCA Registry Number:	Added/Checked Registry Date:
--------------------------	------------------------------

Address [History](#)

Street 1: XXX	Street 2: XXX
City:	State:
Zip:	Home Phone:
Phone 2:	Phone 3:

Emergency [History](#)

Name:	Relationship:
Address:	Phone 1:
Phone 2:	
Name:	Relationship:
Address:	Phone 1:
Phone 2:	

Caregiver Bulk Import Process

- Access and Save the Caregiver Import Template
- Prepare the Caregiver import File for your Agency
- Send the file to HHAeXchange (EDISupport@hhaexchange.com) for File Processing



Login Request a Demo

Who We Help Provider Platform Payer Platform Resources About



HHAeXchange is the premiere Homecare Management Software company for the Medicaid LTSS population. We are the leaders in connecting payers and homecare agency providers to enable more collaboration, communication, and workflow efficiencies. Through the use of the HHAeXchange Portal, our goal is to make working with Pennsylvania's Managed Care Organizations easy and efficient.

OVERVIEW INFO SESSIONS TRAINING FORMS EDI PROCESS FAQs BENEFITS CONTACT

Importing Caregivers into HHAeXchange

(Note: This is not required for agencies using an EDI Import file to integrate with their 3rd Party Agency Management System)

To assist organizations with a large census of Caregivers, HHAeXchange has created a Caregiver Bulk Import tool to expedite the entry process.

Please [CLICK HERE](#) to access the *Caregiver Bulk Import Process Guide*, which provides instructions for how to:

- Access and Save the Caregiver Import Template
- Prepare the Caregiver import File for your Agency
- Send the file to HHAeXchange (EDISupport@hhaexchange.com) for File Processing





Schedule Management (EVV)

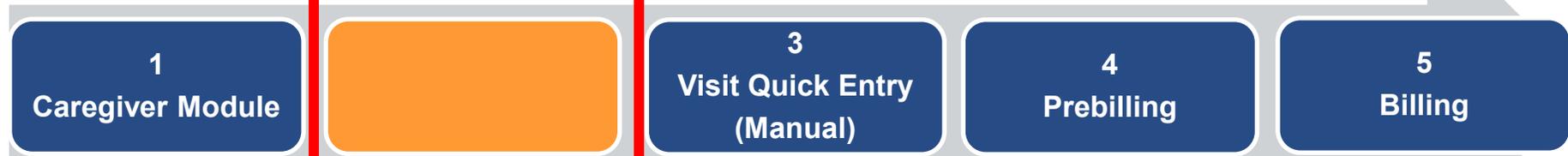
Scheduling – *EVV* only



- **HHAeXchange EVV**



- **Manual Visit Entry**



- **EDI**



Scheduling Visits – Requirements



- Member Status = *Active*

Member Info - Active				
Name: Poe John	Nurse:	Frequency:	MCO Coordinator: Eliza Torelli	
MCO Name: PA Health & Wellness	Admission ID: 12345678	Member ID:	DOB: XX/XX/XXXX	

- Authorization = *Valid Dates/Service Info*

Auth. #	From Date	To Date	Service Type	Service Code	Authorization Type	Payer	Service Category	Notes	Visits/ Invoice
1234567	09/01/2018	01/01/2019	HHA	T2025-SE1	Weekly Weekly Hours: 30.00	PA Health & Wellness	Home Health		Update

- Plan of Care (POC)
 - Can be added to member
 - Caregiver can clock in and record the duties

Category	Task Number	Description	As Needed	Times a Week	Instruction
Personal Care	100	Bath-Tub	Yes	1-7	
Personal Care	101	Bath-Shower	Yes	1-7	
Personal Care	106	Mouth Care/Denture Care	Yes	1-7	
Personal Care	107	Hair Care-Comb	Yes	1-7	
Personal Care	108	Hair Care-Shampoo	Yes	1-7	
Personal Care	109	Grooming-Shave	Yes	1-7	
Personal Care	110	Grooming-Nails	Yes	1-7	
Personal Care	111	Dressing	Yes	1-7	
Personal Care	112	Skin Care	Yes	1-7	
Personal Care	113	Foot Care	Yes	1-7	
Nutrition	205	Prepare Snack	Yes	1-7	
Activity	302	Patient walks with assistive devices	Yes	1-7	
Activity	305	Assist with home exercise program	Yes	1-7	
Treatment / Special Needs	405	Take Blood Pressure	Yes	1-7	
Patient Support Activities	500	Change bed linen	Yes	1-7	
Patient Support Activities	501	Patient Laundry	Yes	1-7	
Patient Support Activities	502	Light Housekeeping	Yes	1-7	
Patient Support Activities	508	Accompany Patient to medical appointment	Yes	1-7	

Scheduling Visits – Functionality



- Creating a Visit (Non-Skilled/Skilled)

A screenshot of a calendar interface. The name 'Sarah' is displayed at the top. The date '20' is highlighted in green, and '21' is highlighted in yellow. A dropdown menu is open for the 21st, showing options: 'New skilled visit', 'New non-skilled visit', and 'Notes'. A red 'X' is visible in the bottom left corner of the calendar grid.

- Schedule Components

A screenshot of the 'Non Skilled Visit' form. The form contains the following fields: Admission ID: 12345678, Member Name: Poe John, Visit Date: 10/21/2018, Member Phone #: 215-555-6677, Assignment ID: 100007, Coordinator: Julie Ann Compton. The 'Schedule' tab is active. The 'Schedule' section includes: Schedule Time: 1630 - 1830 (1), Caregiver Code: 1007 (2) Blake Christopher, POC: 2292564-10/16/17 (3), Service Code: T2025-SE1 (4), H: 02, M: 00, and Bill Type: Hourly. At the bottom, there are 'Save' and 'Close' buttons, with 'Save' circled in red (5).

1. Scheduled Time
2. Caregiver
3. *Optional: Plan of Care (POC)*
4. Service Code
5. Save Schedule

Scheduling Visits - Calendar



- Member Calendar (Member → Calendar Page)

Month: August		Year: 2018		Search		
Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
28	29	30	31	1	2	
4	5	6	7	8	9	
11	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha		S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	14	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	16
18	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	19	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	21	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	23
25	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	26	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	28	S:1100-1300 11:00-13:00 B: N (02:00) Graves Samantha	30
1	2	3	4	5	6	

S:1000-1400 V:- B: N Abreu T Alex	S:1000-1400 V:- B: N Abreu Alex
--	--

COLOR CODES:

Green

Pink

Scheduling Visits – Deleted Visits



- Schedule created in error
- Process
 - Delete from Calendar
 - Capture Reason for Deleting Visit

S:1200-1500
V:-
B: N
Kline
Rosemary



Delete Visit

Admission ID: 65225115426	Member Name: Clerge Wyatt
Assignment ID: 100001	Caregiver Name: Kline Rosemary
Visit Date: 10/21/2018	Coordinator: Kenneth Jackson
Scheduled Time In: 1200	Scheduled Time Out: 1500
*Reason: <input type="text" value="Scheduling Error"/>	
Note: <input type="text"/>	

Scheduling Visits – Master Week



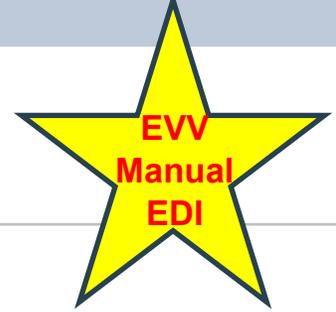
- “Permanent Schedule”
- “Roll Over”

1. Hours (per day)
2. Caregiver
3. Service Code
4. Selected Days
5. Save “Permanent Schedule”



Visit Entry
(EVV, Visit Quick Entry, EDI)

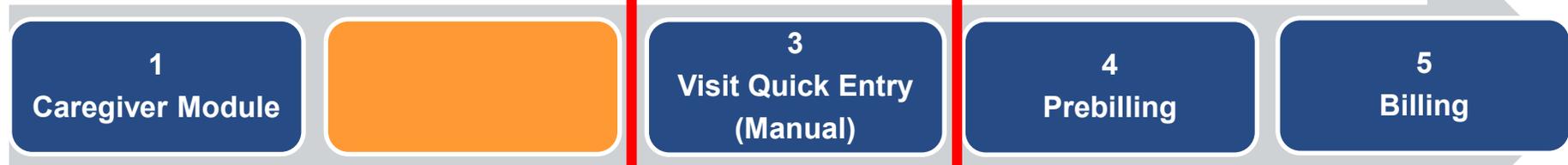
Visit Entry Options - *EVV*, *Manual*, & *EDI*



- **HH AeXchange EVV**



- **Manual Visit Entry**



- **EDI**





Visit Management (EVV)

Visit Management - EVV



- EVV Configuration
- Placing EVV via Phone
 - Clock In
 - Clock Out
- Successful EVV



Sample Instructions



Placing Phone EVV Calls: Instructions



Agency Name

Dial:
English:

Visit Management – Manual Visit Confirm



1. Visit Info Tab
2. Visit Start Time
3. Visit End Time
4. Reason
5. Action Taken

The screenshot shows a web interface for 'Visit Information'. At the top, there are three tabs: 'Schedule', 'Visit Info' (highlighted with a red circle and a red '1'), and 'Bill Info'. Below the tabs, the form contains the following fields:

- Scheduled Time:** 0800-1200
- Visit Start Time:** 0800 (highlighted with a yellow background and a red '2') and 11/03/2017 (with a calendar icon).
- Visit End Time:** 1200 (highlighted with a yellow background and a red '3') and 11/03/2017 (with a calendar icon). A 'Link Calls' button is to the right.
- Missed Visit:**
- Travel Time Request:** (label only)
- * New Reason:** Client doesn't have a phone in l (highlighted with a yellow background and a red '4').
- * Action Taken:** Timesheet received and signe (highlighted with a yellow background and a red '5').
- New Note:** A text area with up and down arrows.
- Prebilling Problem(s):** Caregiver Compliance, Unverified Visit, POC Compliance

At the bottom right, there are three buttons: 'Save', 'Close', and 'Print'.

Visit Management – Manual Visit Confirm



6. Timesheets

- *Required*
- *Approved*

7. POC Duties (Plan of Care)

Audit

Verified By: Member Caregiver Family Member Other

Date Verified: Time Verified: Supervisor:

Duty Sheet POC:7(00:00) Others:0(00:00) Total:7(00:00) **6**

Timesheet Required Timesheet Approved

POC Duties		Duty Number	Category	Duty
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	201	Nutrition	Patient is on a prescribed diet
<input checked="" type="checkbox"/>	<input type="checkbox"/>	202	Nutrition	Prepare-Breakfast
<input checked="" type="checkbox"/>	<input type="checkbox"/>	203	Nutrition	Prepare-Lunch
<input type="checkbox"/>	<input type="checkbox"/>	204	Nutrition	Prepare-Dinner
<input type="checkbox"/>	<input type="checkbox"/>	205	Nutrition	Prepare Snack
<input checked="" type="checkbox"/>	<input type="checkbox"/>	206	Nutrition	Assist with feeding
<input checked="" type="checkbox"/>	<input type="checkbox"/>	207	Nutrition	Record intake - Food
<input checked="" type="checkbox"/>	<input type="checkbox"/>	208	Nutrition	Record intake - Fluid
<input checked="" type="checkbox"/>	<input type="checkbox"/>	411	Treatment / Special Needs	Remind to take medication
<input type="checkbox"/>	<input type="checkbox"/>	412	Treatment / Special Needs	Assist with Treatment
<input type="checkbox"/>	<input type="checkbox"/>	506	Patient Support Activities	Do Patient shopping and errands

7

Visit Management – Call Dashboard



- Searching for Call Issues (Exceptions)

A screenshot of a web application interface for 'Call Maintenance'. At the top, there are six navigation tabs: 'Call Maintenance' (11), 'Missed In' (10), 'Missed Out' (0), 'Missed Call' (155), 'Visit Log', and 'Rejected Calls'. The 'Call Maintenance' tab is highlighted with a red box. Below the tabs is a search form with fields for 'Caregiver First Name', 'Caregiver Last Name', 'Caregiver Code', 'Admission ID', 'Patient First Name', 'Patient Last Name', 'Status' (dropdown), 'Patient Team' (dropdown), 'Patient Location' (dropdown), 'From Date' (calendar), and 'To Date' (calendar). There are also dropdowns for 'Assignment ID', 'Coordinator', and 'Patient Branch'. At the bottom of the form are 'Search' and 'View Report' buttons. A blue arrow points from the 'Search' button towards the right.

- Understanding Call Maintenance “Buckets”
 - Call Maintenance
 - Missed Calls (In/Out/Call)
 - Visit Log and Rejected Calls

Visit Management – Call Dashboard



- Addressing Call Issues (Exceptions)

The screenshot shows a dashboard with navigation tabs: Call Maintenance (11), Missed In (10), Missed Out (0), Missed Call (155), Visit Log, and Rejected Calls. Below the tabs is a search results section titled 'Search Results Total Calls (2)' with a legend button. The table below contains two rows of call data.

Assign. ID#	Caregiver Code	Caregiver Name	Caregiver Phone	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	Action
100012	1012	Roberts Susan	Phone1 : 212-342-9485 Phone2 :	Smith Mike (3453453)	06/30/2016	14:05	IN H	201-895-6191	Out of Window	Reject
100046	1046	Adu Shadae	Phone1 : 718-434-2044 Phone2 :	Cena John (124578) , Srivelletta Samantha (789654)	05/17/2016	08:02	IN H	718-874-9554	No Schedule Opening	Reject

- Fixing Call Issues

- Linking Calls
- Rejecting Calls



Missed Visits & Mutual Visits

Visit Management – Missed Visits



- Visit Does Not Take Place (*not* a “Scheduling Input Issue”)
- Process
 - Edit Visit Information and select *Missed Visit* checkbox
 - Capture Reason, Action Taken, and Note

S:1200-1500
V:-
B: N
Kline
Rosemary

A red arrow originates from a yellow circle around the 'V:-' icon and points to the 'Missed Visit' checkbox in the screenshot.

The screenshot shows a software interface for managing visits. At the top, there are three tabs: 'Schedule', 'Visit Info' (which is highlighted in yellow), and 'Bill Info'. Below the tabs is a section titled 'Visit Information' with a 'History' link on the right. The form contains the following fields and controls:

- Scheduled Time:** 1200-1500
- Visit Start Time:** A date picker set to 12/11/2017.
- Visit End Time:** A date picker set to 12/11/2017.
- Link Calls:** A blue button.
- Missed Visit:** A checkbox that is checked, highlighted with a red box.
- Travel Time Request:** A label above two dropdown menus.
- * New Reason:** A dropdown menu with 'Select' as the current value, marked with a red '1'.
- Action Taken:** A dropdown menu with 'Select' as the current value, marked with a red '2'.
- New Note:** A text area with a vertical scrollbar, marked with a red '3'.
- Prebilling Problem(s):** A label above the text 'Caregiver Compliance, Unverified Visit, POC Compliance'.
- Buttons:** 'Save', 'Close', and 'Print' buttons at the bottom.

Missed Visits

- Required by the state to enter the following three information when selecting the “Missed Visits” option
 - EIM = Yes or No option
 - EIM Number = free text
 - Health = Yes or No option
- Will be reflected in the Missed Visit Reporting

Mutual Visit

- When having Mutual Visits, Caregivers should only clock in ONCE and clock out ONCE for both visits.
 - Example:
 - Visit One – 9:00 AM – 11:00 AM
 - Visit Two – 11:00 AM – 12:00 PM
 - **CORRECT :**
 - CLOCK IN: 9:00 AM
 - CLOCK OUT: 12:00PM
 - **IN CORRECT:**
 - CLOCK IN (Visit 1): 9:00 AM
 - CLOCK OUT (Visit 1): 11:00 AM
 - CLOCK IN (Visit 2): 11:01 AM
 - CLOCK OUT (Visit 2): 12:00 PM



Visit Management (Visit Quick Entry)

Visit Quick Entry (Visit -> Visit Quick Entry)

Manual

Visit Quick Entry

Select Member

* MCO: UPMC Health Plan - Training

* Member: RUSH GARRY (3137242, 0161466180) Search Clear

Active Authorizations (-90 Days)

Show All

Auth. #	From Date	To Date	Service Category	Service Type	Service Code	Authorization Type	MCO	Notes
Auth 3	08/01/2017	08/01/2018	Home Health	PCA	W1793	Weekly Weekly Hours: 48.50	UPMC Health Plan - Training	
Auth 1	08/01/2015	08/01/2016	Home Health	LPN	T1003SE-SW1	Weekly Weekly Hours: 54.50	UPMC Health Plan - Training	
Auth 2	08/01/2016	08/01/2017	Home Health	RN	T1002SE-SW1	Weekly Weekly Hours: 47.50	UPMC Health Plan - Training	

Visit Date	Service Code	Visit Start	Visit End	Duration	Caregiver	Authorization Number
10/18/2018	T1002SE-SW1	0800	1100	03:00	Brown Mike	<input type="text"/> Delete
Visit Date	Select	Visit Start	Visit End		Duties (0) Select Caregiver	<input type="text"/> Delete

Preview Authorization Add

Create Visit



Visit Management (EDI)

3rd Party Interfaces



- **One file to send the following:**
 - Caregiver Information
 - Schedules
 - Visit Confirmation
 - Billing information (invoice numbers)
- **EVV information** (telephony, GPS, other)
 - Recommended but not required for 1/1/2020

EDI Validation Tool and SFTP Creation



File Format Validation Tool

- Validates structural correctness and basic data formatting for Import files
- Successful format validation required before self-service SFTP creation

The screenshot shows the 'HHAExchange File Format Validation Portal' interface. It features a progress bar with three steps: 'Identify Agency', 'Upload File', and 'Result'. Below the progress bar, a 'File Processed Result' section lists various validation checks. The results are as follows:

Validation Check	Result	Action
File Format Validation	Success	
File Naming Convention Validation	Success	
Text Qualifier Validation	Success	
Column Count and Position Validation	Success	
Mandatory Fields Validation	Success	
Max Field Length Validation	Error	More info
Numeric Field Validation	Error	More info
Date Format Validation	Success	
Situational Fields Validation	Success	

Legend: ✘ - Validation Error | ✘ - Validation Skipped | ✔ - Validation Success

Buttons: 'Finish' (green)

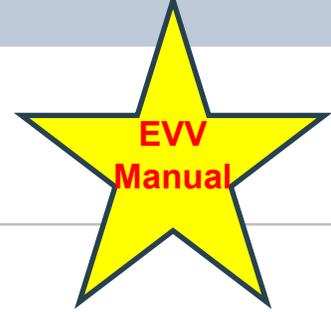
Self Service SFTP Creation

- Eliminates need for EDI providers to contact HHAX to manage SFTP sites
- All EDI providers can create, configure and manage their SFTP account for file transfers to HHAExchange



Prebilling (EVV & Visit Quick Entry)

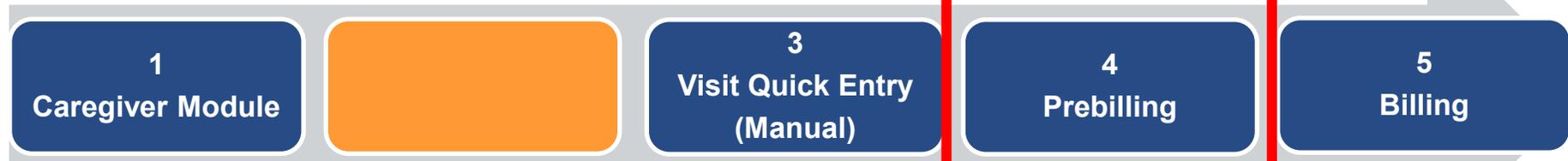
Visit Entry Options - Workflow by Choice



- **HH AeXchange EVV**



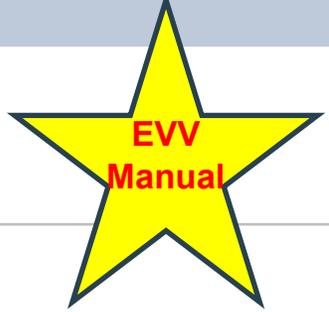
- **Manual Visit Entry**



- **EDI**



Prebilling



- **Prebilling Process**
 - Billing → Prebilling Review
 - Exceptions (Problems)

Prebilling Review

Prebilling Review Search

Member Name: Admission ID: Member Team: All Coordinator: All

Caregiver Code: Caregiver Name: From Date: To Date:

MCO: All

Problem : Unbalanced Visits Missed Visits With Temp Caregiver Caregiver Compliance POC Compliance

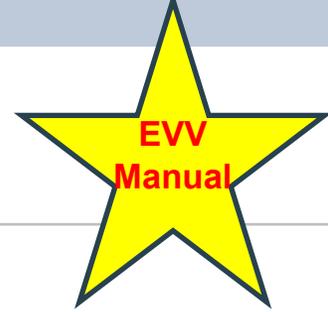
Overlapping Shifts OT/TT Not Approved Restricted Caregiver Timesheet Not Approved Authorization

- **Prebilling Validations**
 - Review Exceptions (*focus on Missed Visit and Authorizations*)
 - Address in HHAX (*EVV, Manual Visit Quick Entry*) or 3rd Party System (*EDI*)

An elderly man with white hair and glasses, wearing a grey t-shirt and suspenders, is kissing an elderly woman on the cheek. The woman has short grey hair and glasses, wearing a yellow top. They are in a kitchen with white cabinets and a sink visible in the background. A blue semi-transparent banner is overlaid at the bottom of the image.

Billing (EVV & Visit Quick Entry)

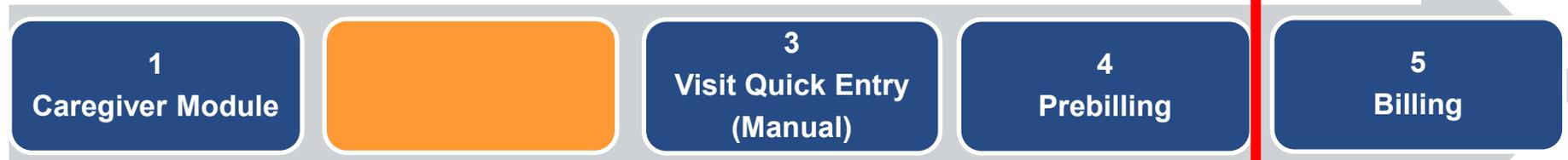
Visit Entry Options - Workflow by Choice



- **HH AeXchange EVV**



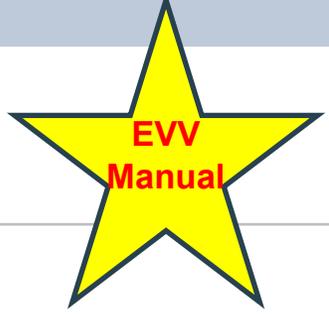
- **Manual Visit Entry**



- **EDI**

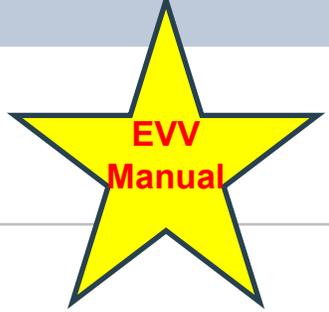


Billing – Process Overview



- **Billing Processes**
 - Create Invoice Batch
 - Perform Billing Review
 - Address in HHAX (*EVV, Manual Visit Quick Entry*) or 3rd Party System (*EDI*)
- **Reviewing Billing Files**
 - Claim Files (837)
 - Remittances (835)
- **Rebill process**
 - Select, Adjust, Submit
 - Must have claim number from remit (i.e. TRN)

Billing – Create Invoice Batch



- **Billing → New Invoice Batch**
 - Search for Billable Visits (Filter by Date Range and Payer)
 - Select Visits to Invoice (to be included in Invoice Batch)

New Invoice Batch
Date: 09/01/2016 Batch Number: 4016LION00010
Total: 0 Amount: \$0.00 [Refresh](#)

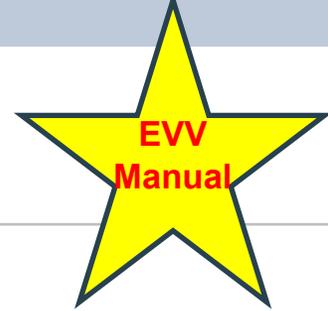
Billable Visits
From Date: To Date: Payer: Tiger Care DEMO PAYER

Search Results (19)

<input type="checkbox"/>	Date	Caregiver	Admission ID	Patient Name	Visit	Visit Hrs	Visit Rate	TT Hrs	TT Rate	Amount
<input type="checkbox"/>	06/06/2013	Bush Alfred Reginald	LIO-1234567892	Jackson Jarrell Austin	1200-1700	05:00	\$10.00		\$10.00	\$50.00
<input type="checkbox"/>	04/03/2016	Lambe ML Mahesh	LIO-ADM432	Jagan SJ Suresh	1600-1800	02:00	\$10.00		\$0.00	\$20.00
<input type="checkbox"/>	04/05/2016	Bush Alfred Reginald	LIO-1234567892	Jackson Jarrell Austin	0800-1300	05:00	\$10.00		\$0.00	\$50.00
<input type="checkbox"/>	04/05/2016	Looney George	LIO-ADM432	Jagan SJ Suresh	1600-1800	02:00	\$20.00		\$0.00	\$40.00

- **Save Selected Visits** ()
- **Click** (Generates “Batch” of invoices; 1 per Visit/Member)

Billing – Perform Billing Review

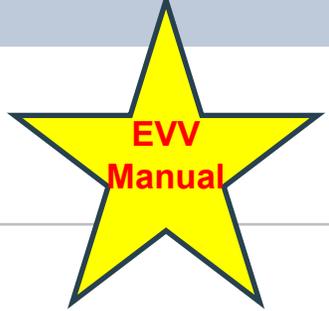


- Billing → Billing Review
 - Search for Invoiced Visits

Invoice Number	Invoice Date	Admission ID	Patient Name	Contract	Coordinator	Visit Date	Service Code	Units	Amount on Hold	Hold Reasons
600094	05/11/2016	242424242424	Woodson, Charles	Tiger Care DEMO PAYER		02/08/2016	HHA H1	0.00	\$20.00	Missing Patient Address, Missing Patient City, Missing Patient State, Missing Patient ZipCode, Manual Hold : Wrong Visit
600095	05/11/2016	NW153754	Woden, Neptunus	Tiger Care DEMO PAYER	Jim Schwartz	01/05/2016	HHA H1	0.00	\$20.00	Manual Hold : Wrong Visit
600099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	09/22/2015	HHA H1	0.00	\$10.00	Missing Patient State
600099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$60.00	Missing Patient State
600101	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$40.00	Missing Patient Address, Missing Patient City, Missing Patient State, Missing Patient ZipCode
600101	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	11/03/2015	HHA H1	0.00	\$40.00	Missing Patient Address, Missing Patient City, Missing Patient State, Missing Patient ZipCode

- Address Exceptions (Hold Reasons)
 - In HHAX (*EVV, Manual Visit Quick Entry*)
 - In 3rd Party System (*EDI*)

Billing – Reviewing Billing Files



- Nightly Processes (837 Generation)
- Reviewing Billing Files (Admin → File Processing)
 - Claim Files (837)
 - Remittances (835)

File Processing Limited 6.0.1.0 7/23/2017

Claim Files **Remittances**

Download Files

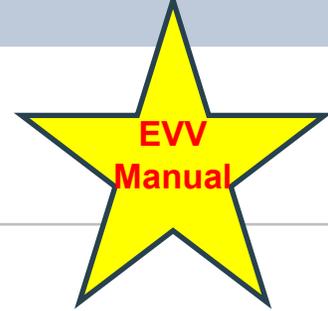
File Type: 837 Claim File MCO: All Processed From: Processed To:

Invoice Batch Number: File Name:

Search Results (35) 1 2

File Type	Claim Type	MCO	Invoice Batch	Member #	Claim #	Claim Amount	File Name	Processed Date/Time			
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWD00036	1	1	\$13.00	CLM10131447400035_12062017_033514.txt	12/6/2017 8:35:14 PM	Detail	Summary	Export
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWD00035	1	1	\$10.00	CLM10131447400034_12052017_030021.txt	12/5/2017 3:00:21 PM	Detail	Summary	Export
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWD00034	1	1	\$86.00	CLM10131447400033_11292017_093017.txt	11/29/2017 9:30:17 AM	Detail	Summary	Export
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWD00033	1	1	\$86.00	CLM10131447400032_11212017_050513.txt	11/21/2017 5:05:13 PM	Detail	Summary	Export

Billing – Rebill Process



- *Billing → Electronic Billing → Batch Search and Resubmit Claims*
- Add claims for resubmission

HHaExchange - Claim Search

Search

Batch Number: Invoice Number: Service Code: Admission ID:

Last Name: First Name: Claim Status:

Visit From: Visit To:

Resubmit claims E-submission Batch

Payer: Batch Number: Batch Date:

Resubmit Claims Search [Legend](#)

Search Results (5) Delay Reason Code: Visits Older Than: Page 1 of 1

Batch Number	Admission ID	Patient Name	Visit Date	Invoice No	Service Code	Caregiver Name	Schedule	Visit	Visit Hours	Billed Hours	Billed Units	Bill Type	Billed Amount	ST	TRN	
0004DVN200213	DVN-	Brooks Steven	06/03/2014	395423	Daily1	Rosa Martinez	0200-0300	0200-0300	01:00	01:00	1.00	Hourly	\$0.00	O		<input type="button" value="✎"/> <input type="button" value="✖"/>
0004DVN200215	DVN-	Brooks Steven	06/04/2014	395427	Rate1	Rosa Martinez	0800-0900	0800-0900	01:00	01:00	1.00	Hourly	\$12.50	O		<input type="button" value="✎"/> <input type="button" value="✖"/>
0004DVN200210	DVN-	Brooks Steven	05/07/2014	395418	Rate1	Bav Raj	0900-1000	0900-1000	01:00	01:00	1.00	Hourly	\$12.50	O		<input type="button" value="✎"/> <input type="button" value="✖"/>
0004DVN200216	DVN-	Shah Nirma	12/07/2015	395428	Rate1	Shamim Patel	0100-0200	0100-0200	01:00	01:00	1.00	Hourly	\$12.50	O	555555	<input type="button" value="✎"/> <input type="button" value="✖"/>
0004DVN200217	DVN-	Shah Nirma	12/08/2015	395429	Rate1	Shamim Patel	0200-0300	0200-0300	01:00	01:00	1.00	Hourly	\$12.50	O		<input type="button" value="✎"/> <input type="button" value="✖"/>

Rebilling Process

Resubmit as

- Original
- Adjustment
- Void

TRN Required

- Adjustments
- Void

HHAEExchange - Claim Adjustment

Claim Adjustment

IMPORTANT: Claim Adjustment changes will bypass ALL billing validations and rounding rules. It is an override function.

Visit Date: 10/03/2018

* Submission Type: Original

Start Time: 10/03/2018 2000 (HHMM)

End Time: 10/03/2018 2000 (HHMM)

Note: Items below this line must be updated one claim at a time.

Service Hours: 04:00 Billed Hours: 04:00

Caregiver Name: Lin Rebecca

Employment Type: PCA, HHA, HMK, RESP

* Service Code: W1793

Rate Type: Hourly

Billing Export Code: W1793

* Units per Hour/Daily/Visit: 4.00

* Billed Rate: \$18.000000

Billed Units: 16.00

Billed Amount: \$72.00

Save Close



Reporting

Reporting – Key HHAeXchange Reports

- **List of Members**
 - Census Information (Data from Member Module)
- **Batch Detail Report**
 - Revenue Generation (by Individual Invoice Batch)
- **Unverified Visits Aging Detail**
 - Listing Visits with Exceptions (before Prebilling processes)
- **Member General Notes**
 - Listing of Notes captured in HHAX (Related to Member Services)
- **List of Caregivers**

Reporting – Overview of Report Layout

- Report Generation and Navigation

The screenshot shows the HHAeXchange Member General Notes report. At the top, there is a navigation bar with a search bar and a 'Find | Next' button. Below this is a search criteria area with various filters. The main part of the screen is a table of report data.

Status	Created Date	Created By	Adm ID	Member Name CaregiverName	MCO	Note	Reason	Closed By	Closed Date	To Name	Type of Notes
Open	11/13/2017 13:32	seniorcaredemo (Senior Care - PA)	11285866703	Fitzgerald Craig	Pennsylvania Top MCO - PA	[Wednesday(1200-1600)] (Type: Temporary, From Date: 11/01/2017, To Date: 11/01/2017, Replacement Aide: Walker Jessica)	change in service			Pennsylvania Top MCO - PA	PG
Open	11/07/2017 09:51	seniorcaredemo (Senior Care - PA)	58579642107	Keller Liam	Pennsylvania Top MCO - PA	(Type: Permanent, Replacement Aide: Robertson Rebecca)	change in service			Pennsylvania Top MCO - PA	PG
Open	11/13/2017 14:38	seniorcaredemo (Senior Care - PA)	58579642107	Keller Liam	Pennsylvania Top MCO - PA	[Monday(1200-1600)] (Type: Temporary, From Date: 11/06/2017, To Date: 11/06/2017, Replacement Aide: Blake Christopher)	change in service			Pennsylvania Top MCO - PA	PG
Open	11/21/2017 16:35	seniorcaredemo (Senior Care - PA)	58579642107	Keller Liam	Pennsylvania Top MCO - PA	Continue scheduling with usual Caregiver.	Calendar Note			Pennsylvania Top MCO - PA	PG

- 1 Navigation Bar (Top)
- 2 User Search Criteria (Middle)
- 3 Report Data (Bottom)

- System Reports

Reporting – List of Members

Path: Report → Members → List of Members

HHAeXchange		<u>List of Members Ent</u>	
Report Date: 12/07/2017 10:30			
Admission ID:	Member ID:	Status: Active	Coordinator: All
Last Name:	First Name:	Phone Number:	Primary MCO: All
Branch: All	Sort By: LastName	Nurse: All	Team: All
Location: All	No Display Duplicate Member: No		
Admission ID	First Name	Last Name	
1 22699578804	Maritza	Ramos	
2 31124778521	Amelia	Bernt	
3 15678892101	Bob	Flowers	
4 12442115906	Emma	Green	
5 36358874722	Matthew	DeRossi	
6 11285866902	Ginny	Gordon	
7 58579642107	Liam	Keller	
8 65225115426	Wyatt	Clerge	
9 11285866703	Craig	Fitzgerald	
10 12345678	John	Poe	

Reporting – Batch Detail Report

Path: Report → Billing → Invoicing → Batch Detail Report

HHAeXchange		Batch Detail Report										Page 1 of 32			
Batch Number: 14474RWDP00021										Batch Date: 11/06/2017				Report Date: 12/7/2017 10:58:47 AM	
Export Date:					Invoice Count: 1										
Total Amount: \$231.03					Total Hours: 15:00										
Total OT Hours:					Total TT Hours:										
Total Visit Hours: 15:00					Provider: Riverwood Demo										
Status: Pending															
Sr. No.	Invoice Number	Member Name	Admission ID	Visit Date	Service Code	Caregiver Name	Caregiver Code	Employee ID	Billed Hours	OT Hours	TT Hours	Total units	Billed Amount		
1	600031	JOHNSTON JEREMY	01614661101	10/13/2017	T2025-SW1	Thomas Carl	1004		03:00			3.00	\$64.56		
2	600031	JOHNSTON JEREMY	01614661101	10/14/2017	S5150	Thomas Carl	1004		03:00			3.00	\$30.51		
3	600031	JOHNSTON JEREMY	01614661101	10/15/2017	T1005	Thomas Carl	1004		03:00			3.00	\$30.48		
4	600031	JOHNSTON JEREMY	01614661101	10/16/2017	T2025-SW1	Thomas Carl	1004		03:00			3.00	\$64.56		
5	600031	JOHNSTON JEREMY	01614661101	10/17/2017	W1792-SW1	Thomas Carl	1004		03:00			3.00	\$40.92		
	Total								15:00				\$231.03		

Reporting – Unverified Visits Aging Detail

Path: Report → Compliance → Unverified Visits Aging Detail

HHAExchange		Unverified Visits Aging Detail					Page 1 of 5					
							Report Date: 12/07/2017 11:04					
Provider Name	<3	3-7	8-14	15-21	22-28	>28						
Riverwood Demo	0	3	21	21	22	26						
From Date: 11/7/2017		To Date: 12/7/2017			Exclude Non Billable Visits: Yes							
Teams: All								DS : Duty sheet required				
Total RowCount: 83												
Sr #	Provider Name	Admission ID	Member Name	Status	Caregiver Name	Visit Date	Aging Days	Schedule	Discharge Date	Team	Notes	DS
1	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/30/2017	7	1200-1400		Default		
2	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/28/2017	9	1200-1400		Default		
3	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/27/2017	10	1200-1400		Default		
4	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/25/2017	12	1200-1400		Default		
5	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/24/2017	13	1200-1400		Default		
6	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/23/2017	14	1200-1400		Default		
7	Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/21/2017	16	1200-1400		Default		

Reporting – Member General Notes

Path: Report → Other Reports → Member General Notes

Status		Created Date	Created By	Adm ID	Member Name Caregiver Name	MCO	Note	Reason	Closed By	Closed Date	To Name	Type of Notes
Closed	12/05/2017 09:32	upmc (UPMC Health Plan - Training)	01614661301	VOLZ VICKIE	UPMC Health Plan - Training	Authorization will be corrected within 3 business days. 30 hours per week can be used	Authorization Edit	riversupport (Riverwood Demo)	12/05/2017	Riverwood Demo	PG	
Closed	11/17/2017 09:45	upmc (UPMC Health Plan	01614661401	SAGER AMY	UPMC Health Plan -	Yes. Correct is 373 Main St, Altoona	Authorization Edit	riversupport (Riverwood	11/17/2017	Riverwood Demo	PG	



Member General Notes

Page 1 of 8

Report Date: 12/07/2017 10:42

From Date: 11/1/2017	To Date: 12/7/2017
MCO : Health Plan - Training	Member Name: All
Linked Notes From: Health Plan - Training	Linked Notes To: All
Reason: All	Calendar Notes: No
Member General Notes: Yes	Missed Visit Notes: No
Visit Caregiver Comments: No	Coordinator : All

Type of Notes Values:

PG	Member General Notes
CN	Calendar Notes
VCC	Visit Caregiver Comments
MVN	Missed Visit Notes

Reporting – List of Caregivers

Path: Report → Caregiver → List of Applicant/Caregivers

HHAeXchange		<u>List of Applicants/ Caregiver</u>						Page 1 of 1				
Provider: Riverwood Demo		Type: All		Status: All								
From Date:		To Date:		Report Date: 12/07/2017 04:45 PM								
Discipline: All		Team: All		Group By: No Group								
Caregiver	Caregiver Code	Alt. Caregiver Code	Discipline	Team	Date of Birth	Phone	Current Status	Current Type	Application Date	Hire Date	Language1	Language2
Brown Mike	1005		RN, LPN, PT, OT, ST		XXXXX		Active	Employee				
Fried Gary	1001		HHA		XXXXX	--	Active	Employee				
Hamilton Kip	1010		PCA, HHA, Other (Non Skilled)		XXXXX		Active	Employee				
Loretta Johnson	1009		PCA		XXXXX		Active	Employee				
Richardson Rhan	1003		PCA, HHA, PA		XXXXX	718-406-4633	Active	Employee	08/01/2017	09/01/2017	English	Creole



Administration

Administration and System Support

- **Provider Profile**
 - **Email Alerts**
- **User Management**
 - How to create User Names and passwords in HHAeXchange
 - Roles
 - Permissions
 - Restrictions
- **Coordinator Setup – *Must Add At Least 1 (Default)***
- **Provider Reference Table Management**
- **Rate Management**

Administration – Provider Profile

- Admin → Provider Profile
- General Section
- Address Section
- Automatic Email Section

The screenshot shows the HHAeXchange administration interface. The 'Admin' menu is open, with 'Provider Profile' selected. The page displays the 'Provider Profile' form, which is divided into several sections: 'Provider Info', 'Address', and 'Automatic Email'. The 'Provider Info' section includes fields for 'Provider Name', 'Provider Code', 'Serviced Zip Codes', 'Languages', 'Provider Initials', 'Password Expires Within', 'Visit Creation Based on EVW Confirmations', 'Mobile GPS Visit Verification', and 'Tolerance Range (ft)'. The 'Address' section includes fields for 'Street 1', 'City', 'Zip', 'Street 2', 'State', and 'Home Phone'. The 'Automatic Email' section contains a table of notification types and recipients.

Common Notifications	Recipients	Status	Edit
Caregiver Mobile Opt-Out Notification		Active	Edit
Request for New Placement	JoeUser@hhaexchange.com, JaneUser@hhaexchange.com	Active	Edit
Confirmed Placement	a@hhaexchange.com	Active	Edit
Cancellation of Placement	a@hhaexchange.com	Active	Edit
Revoke Placement	a@hhaexchange.com	Active	Edit

The dialog box is titled 'HHAeXchange - Automatic Email Recipients - Request for New Placement'. It contains a section for 'Automatic Email' with a 'History' link. Below this, there is a list of email addresses: 'JoeUser@hhaexchange.com, JaneUser@hhaexchange.com'. There are also fields for 'Roles' and 'Active' (checked). At the bottom, there are 'Save' and 'Cancel' buttons.

Administration – User Management

Admin → User Management → New User → User Search → *Edit User*

Add New User Limited 15.3.1.0 TELXWEB0.

Add New User

* First Name:

* Last Name:

* Login Name: ⓘ

* E-mail:

* Role:

Default Home Module Tab: Link Communications System Notifications ⓘ

Status: ⓘ

IP Restricted IP1 : IP2 : IP3 :

Hourly Restricted

	Day	From	To	IP ⓘ
Mon :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tue :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wed :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Thu :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fri :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sat :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sun :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Administration – Coordinator Setup

- Admin → Coordinator Setup
(*Note: Must be at least 1 created for Placements!*)

New Coordinator

Coordinator Details

*Coordinator Number:

*Coordinator Name:

Status: ▼

Coordinator Search

Name: Number: Active: ▼

Search Results (1)

Number	Coordinator Name	Status	
17911	Default	Active	Edit

Administration – Reference Tables

- Admin → Reference Table Management

Reference Table Management

Search

* Reference Table:

Search Results

Member Team ID	Member Team	Description	Status
4152	Default	Default	Active
5215	Team 1	SW 01	Active
4151			Active

HHAEExchange - Member Team Details

Member Team Details

* Member Team:

Description:

Status: Active

Administration – Rate Management

- Admin → Rate Management
 - View Only

Rate Management

*MCO:

Billing Rates

Status: Discipline: Rate Type:

From Date: To Date:

Search Results (117)

Service Code	Category	Service Type	From Date	To Date	Rate	Rate Type	Status
W1793	Home Health	PCA	01/01/2017	12/31/2017	17.52	Hourly	Active
W1759	Home Health	Other (Non Skilled)	01/01/2017	09/01/2018	10.01	Hourly	Active



HHaEXchange Provider Resources

- Provider Information Center
 - www.hhaexchange.com/PACHC
- Support
 - Support@hhaexchange.com