

# The HHAExchange Implementation EDI Process

## Overview

Thank you for participating in the Electronic Data Interchange (EDI) project for your Agency. This letter provides information, general requirements, and steps to take to successfully integrate your Agency Management System with HHAExchange (HHAX). Carolina Complete Health, AmeriHealth Caritas of North Carolina, UnitedHealthcare Community Plan of North Carolina, and WellCare of North Carolina have partnered with HHAExchange to provide software that allows Providers to have a single login for all PHPs to access authorization, communicate, and meet Electronic Visit and Verification (EVV) requirements of the 21st Century Cures Act.

HHAX coordinates directly with NC PHP to ensure that members and authorizations are passed directly into the HHAX system. HHAX uses the Provider Agency Tax ID Number (TIN) and NPI number combination to identify data records sent to and from your Agency.

To integrate between your 3<sup>rd</sup> Party Agency Management System and HHAX, EDI Import file must be created according to HHAX specifications detailed in the following documentation (links below) and as further explained in this letter.

- Import: [HHAExchange EDI Interface Import Guide](#)
- Export: [HHAExchange EDI Interface Export Guide](#)
- EDI Code Table: [NC PHP EDI Code Table Guide](#)

## HHAX EDI Import

### HHAX EDI Import Interface Files (into HHAExchange)

The **EDI Import File** can be imported into HHAX from your Agency Management System.

Once the EDI Import file has been created according to the required format it is ready for the testing phase. To ensure the format validity of the created files, access the [HHAExchange File Format Validation Portal](https://edi.hhaexchange.com/) (<https://edi.hhaexchange.com/>) and follow the steps within the portal. Instructions are also available on the [HHAExchange File Format Validation Portal Job Aid](#).

Once you have successfully validated your EDI Import file format, information will be provided in the HHAX Regional Information sessions regarding next steps in the EDI Process.

## HHAX EDI Export

### HHAX EDI Export Interface Files (from HHAExchange)

The below-listed files are exported from HHAExchange on a nightly basis (frequency) for you to integrate with your Agency Management System. The export files are automatically placed by the HHAExchange system in the Outbox folder on the SFTP site setup for your Provider Agency.

- Billing Exceptions
- Billed/Processed Visits
- Pre-Adjudication Rejections

HHAExchange has provided links to sample files in the [HHAExchange EDI Export Interface Guide](#) which are used to perform integration testing with your Agency Management System.

## Production Process and Transmission Frequency

The import and export files detailed in this letter make up the entirety of the integration files for production. While HHAExchange places Export files on the SFTP server on a nightly basis, PHP can determine the required frequency for integrating the Import files into the HHAX Provider Portal.

## Timeline and Steps for EDI Integration Readiness

If your Agency plans to produce the required EDI Import file format, then follow the steps outlined below for guidance and expectations throughout the EDI Integration process.

Step	Timeline Dates	Expectations
1	Wednesday, May 12, 2021 Thursday, May 13, 2021 Thursday, May 20, 2021	<p><b>Attend the Provider Information Section</b></p> <p>Sessions are offered in morning or afternoon and include a demo of the HHAExchange platform. Attendance is only required for ONE (1) session as both provide the same information. The pre-recorded webinar sessions allow for a Q/A chat option to answer any questions.</p> <p><a href="#">Click here to Register</a></p>
2	Friday, May 14, 2021	<p><b>Initiate contact with HHAX to begin the Integration Process</b></p> <p>Contact <a href="mailto:EDIsupport@hhaexchange.com">EDIsupport@hhaexchange.com</a> with a subject line of “PHP Integration” to begin the integration process.</p>
3	Latest by Friday, May 28, 2021	<p><b>Complete Provider Enrollment Form</b></p> <p>Providers who have not completed the survey form must complete the <a href="#">Provider Portal Enrollment Form</a> ; necessary to access the HHAExchange Portal. In the form, Providers are asked to give details such as Provider location, Caregivers, and contact information for all future communications.</p>
4	Work with the EDI Integration Team to complete this task prior to the PHP Go-Live Date of July 1, 2021	<p><b>Review File Format Specifications for Integration</b></p> <p>Review the <a href="#">HHAExchange EDI Interface Import Guide</a> and the <a href="#">HHAExchange EDI Interface Export Guide</a> to determine if you have resources and the ability to produce the required EDI file formats.</p> <p><b>Create the required EDI Import interface file formats for your Agency</b></p> <p>Work with your Agency’s technical team to create your EDI Import files prior to testing.</p> <p><b>Test Import File to verify successful format</b></p> <p>Use the <a href="#">HHAExchange File Format Validation Portal</a> to test (validate) your Agency’s EDI Import interface file format.</p>
5	Wednesday May 19, 2021 Tuesday May 25, 2021 Thursday June 3, 2021	<p><b>Attend EDI Provider Onboarding Webinar</b></p> <p>Register for the EDI specific user training using the link below. This training provides an understanding of the HHAExchange Provider Portal and the EDI integration process. <a href="#">Register here</a> for the EDI Specific Webinar.</p>

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6	Week of June 7-11, 2021	<p><b>System User Training Webinar Week</b> Register and attend the training webinar week from Monday-Friday. Each day a different aspect of the HHAExchange functionality is reviewed with a live Q/A chat option allowing Providers to ask questions related to the Provider Portal functionalities. Each webinar is specific to the staff role in your Agency:</p> <table border="1"> <thead> <tr> <th>Day</th> <th>Topic</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Monday, 6/7: Overview video</td> </tr> <tr> <td>2</td> <td>Tuesday, 6/8: HHAX Management</td> </tr> <tr> <td>3</td> <td>Wednesday, 6/9: (based on your Provider EVV selection):                             <ul style="list-style-type: none"> <li>• EDI Integration (AM Session- <i>This session applies to you as an EDI Provider</i>)</li> <li>• HHAX EVV (PM Session)</li> </ul> </td> </tr> <tr> <td>4</td> <td>Thursday, 6/10: Billing</td> </tr> <tr> <td>5</td> <td>Friday, 6/11: Admin and Next Steps</td> </tr> </tbody> </table> <p><a href="#">Click here to register</a> and review the descriptions providing more insight on the associated roles and content of each webinar. These webinars are correlated with the LMS training and can be attended by multiple staff members of your Agency.</p>	Day	Topic	1	Monday, 6/7: Overview video	2	Tuesday, 6/8: HHAX Management	3	Wednesday, 6/9: (based on your Provider EVV selection): <ul style="list-style-type: none"> <li>• EDI Integration (AM Session- <i>This session applies to you as an EDI Provider</i>)</li> <li>• HHAX EVV (PM Session)</li> </ul>	4	Thursday, 6/10: Billing	5	Friday, 6/11: Admin and Next Steps
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7	Monday June 7, 2021	<p><b>Log-in to your Provider Portal</b> Receive your Provider Portal credentials to log in to the system and begin entering Caregivers. Ensure the Portal is set up prior to go-live.</p>												
8	Monday, June 14, 2021 Wednesday, June 16, 2021 Thursday, June 17, 2021	<p><b>Pre-Go Live Webinar</b> This is an opportunity for Providers to recap on important information regarding this implementation as well as addressing any questions to ensure they are set up and ready to be EVV compliant prior to go-live. <a href="#">Click here to Register for the webinar</a></p>												
9	Thursday June 24, 2021 Tuesday June 29, 2021	<p><b>EDI Provider- Post Integration Training</b> Assist Providers with post go-live review of EDI processes in the HHAExchange System. This training provides an understanding of the HHAExchange Provider Portal and the EDI Integration Process. Q/A is available for Providers to ask questions and receive support.  <a href="#">Register here</a> for EDI Post Integration Webinar</p>												
10	Thursday July 1, 2021	<p><b>Go-Live Date</b> Providers are expected to start using the HHAExchange Provider Portal to schedule, confirm and bill EVV compliant visits. All paid claims under the EVV mandate (PCS services) must be supported by the visit data to be compliant with the CURES Act mandate.</p>												

## Provider Information Center

Visit the [North Carolina Information Center - HHAExchange](#) which shares an overview behind PHP partnership with HHAExchange, as well as information on training, integration, and the EDI Process.

## EDI Assistance

Please contact [EDISupport@hhaexchange.com](mailto:EDISupport@hhaexchange.com) if any questions or further guidance is needed. An available Support Team Members will contact you directly to assist. Please use the subject line “NC PHP” when sending emails for a timely response.