Administrative Functions Process Guide

Provider User Guide

Document Revision History

Date	Description of Revision
09/25/2020	Initial version of the document
03/08/2021	Accessibility standards applied
08/22/2022	General updates

Table of Contents

Overview

The functions under the **Admin** module serve as the building blocks for the entire the system. Proper setup and maintenance of these functions is essential to the continued efficiency of the Provider Portal.

This process guide covers the critical system components managed in the **Admin** module to include *User Management*, *Reference Table Management*, *Office Setup*, *Agency Profile*, *Contract Setup* and numerous other functions in the HHAeXchange (HHAX) system.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Customer Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAeXchange

User Management

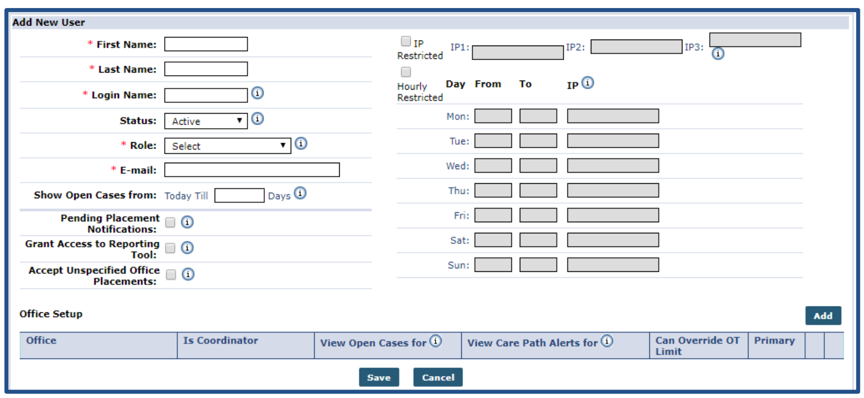
Users are employees who handle the logistics at an Agency. A User is assigned a **Role**, such as *Admin*, *Coordinator*, or *Collection Representative*. **Permissions** in the system are role-based; therefore, permissions are enabled for a role (rather than for an individual User). Functions, features, and modules are dictated by system permissions to include functionality within the *Admin* tab.

Permissions are granted and modified for Roles via the **User Management** function under the *Admin* tab. Use the **User Management** function to create a *New User*, generate a *User Search*, and *Edit Roles*.

New User

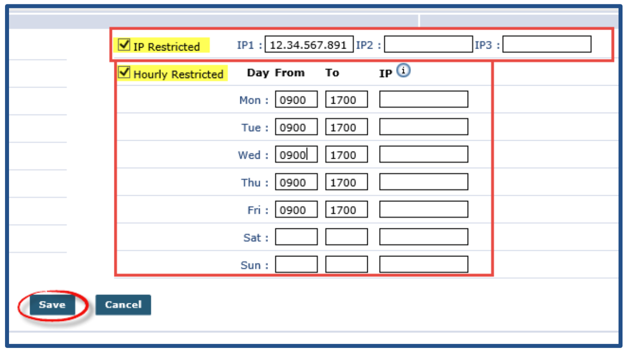
Users with roles that are assigned the *Edit Roles* permission are granted the permission to add **New Users** and *deactivate User Accounts* in the system. The **New User** and **Inactivate Users** permissions must be enabled by an Agency Admin for a selected role to access respective functionality. This section provides instructions on how to assign permissions to a role, create new users in the system, and deactivate user accounts.

Create a New User

Step	Action
1	Navigate to ***Admin > User Management > New User*** to access the *Add New User* page.
2	The *Add New User* page opens. Complete the required fields (denoted with a red asterisk), as illustrated in the following image and described below.  **Add New User Page** • ***First Name:** Enter the user's first name. • ***Last Name:** Enter the user's last name. • ***Login Name:** Enter the login name for the user to enter the system. Login name must be unique within an Agency AND across the HHAX platform. Username can include letters, numbers, underscores, dashes, @ sign, or dots. Note that there is a 50-character limit to any login name. Email address can be used. • ***Email:** Enter the user's unique email address. This email is used for any assigned system notifications to include the initial email with temporary password to log in to the system. • ***Role:** Select the Role(s) for the user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
On this page, User Access location, days, and times can be restricted using the IP Address fields. Select one or both options as illustrated in the following image and described in the table below.

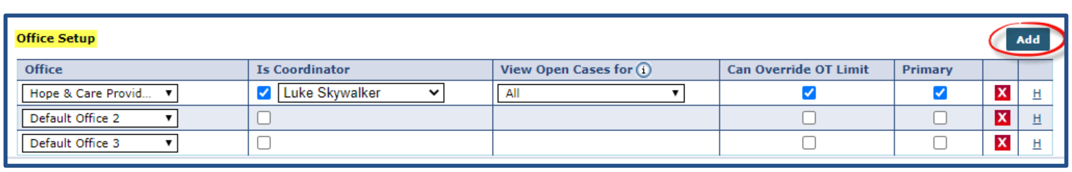
Note: *These restrictions are optional.*



Access Restriction

- **IP Restricted:** Restrict access to the system to up to 3 unique IP addresses.
- **Hourly Restricted:** Specify the days and hours when Users may access the system. A valid IP address for each day of the week can also be added.
</td></tr>
<tr><td>4</td><td>Select other permissions specific to the user such as Pending Placement Notifications, Reporting Tool access, and Accept Unspecified Office Placements.</td></tr>
<tr><td>5</td><td>
Additional settings can be indicated for the user under the *Office Setup* section. Click the ***Add*** button to assign other Offices and functionality (per Office) to the user. For example, the image below illustrates that this user is the Coordinator in the Hope & Care Providers Office, able to view all Open Cases for the selected Coordinator. This user can also Override OT Limits for that Office.

Only one Office can be the designated **Primary** at a time. Once a Primary Office is selected, functionality in other Offices is limited.

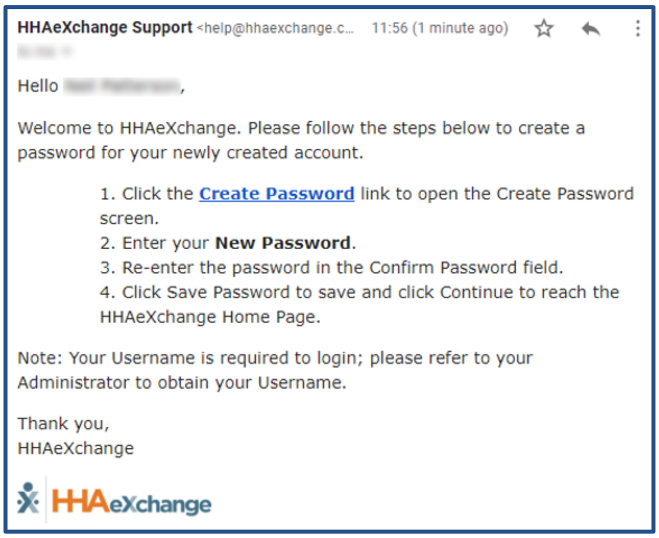


New User – Office Setup
</td></tr>
<tr><td>6</td><td>Click the Save button to create the New User’s profile. Thereafter, the user receives an email with a temporary password to log in to the system.</td></tr>
<tr><td>7</td><td>Provide the user his/her login name. The email does not include this information.</td></tr>
</table>

Create Password for a New User

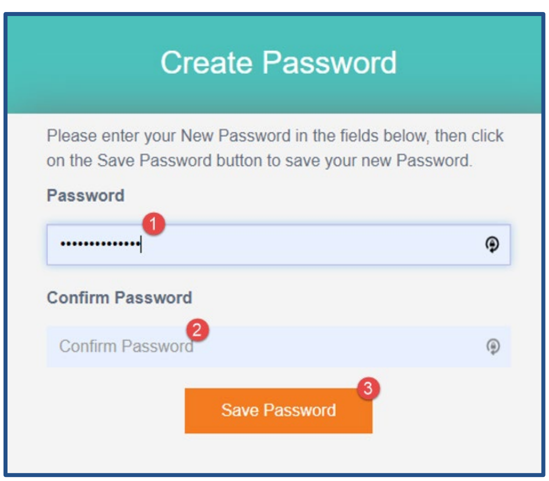
When an Agency Admin creates a New User Account, a Create Password process is generated by the system once the new profile is saved. The following examples demonstrate the steps for users to Create a Password.

The User receives the **Create Password** email with link and instructions. Upon clicking on the **Create Password** link, the user is routed to the Login screen, seen below.



The following image illustrates a standard *Create Password* Login page. On this screen, the user:

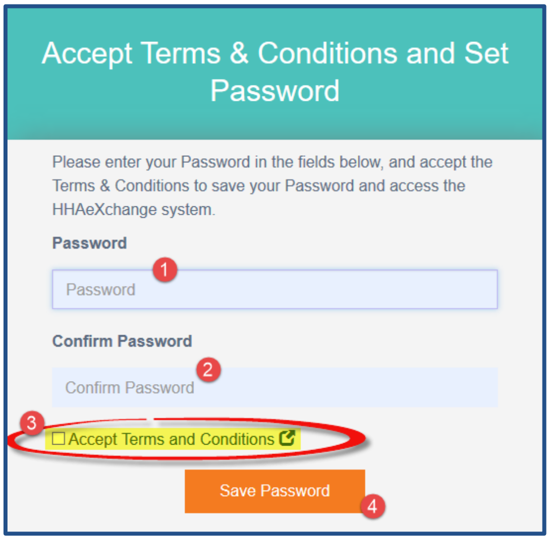
1. enters a **Password**;
2. re-enters the password in the **Confirm Password** field; and
3. Clicks on ***Save Password*** to continue.



Create Password: Standard Login Page

The following image illustrates the Login page for Agencies configured to require Terms and Conditions. On this screen, the user:

1. enters a **Password**;
2. re-enters the password in the **Confirm Password** field;
3. selects the required **Accept Terms and Conditions** checkbox; and
4. click on *Save Password* to continue.



Create Password: With Terms and Conditions

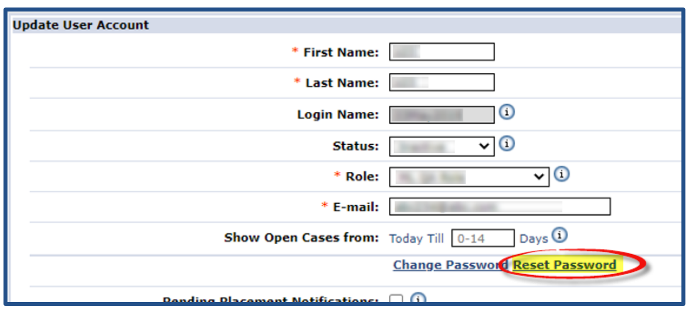
The system guides the user with instructions and password requirements. Refer to the [Self-Service Password Reset Job Aid] for further guidance.

Password Reset Initiated by Administrator

Agency Admins can initiate a Password Reset for any Agency user for various purposes, typically for security measures (for example, if credentials are compromised). Instead of providing a password for the user, the process is automated prompting the user to reset the password after the initiation from the Agency Admin.

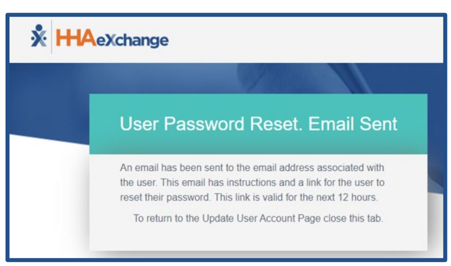
Initiating the Password Reset

A **Password Reset** can be initiated via the *User Account* page ***(Admin > User Management > User Search***). On the *Update User Account* page, click on the **Reset Password** link (as seen in the image below).



User Account Page: Reset Password Link

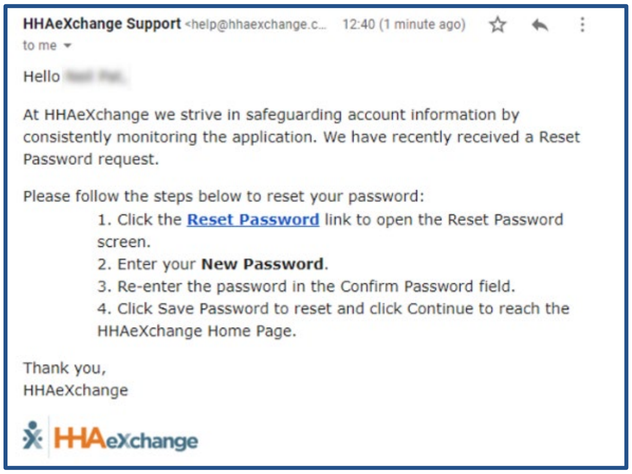
The system alerts the Agency Admin that an email has been sent to the user with a Reset Password link, effective for the next 12 hours. Click out of the alert to close the window and return to the User Account page. No further action required from the Agency Admin.



Password Reset Alert

User Password Reset

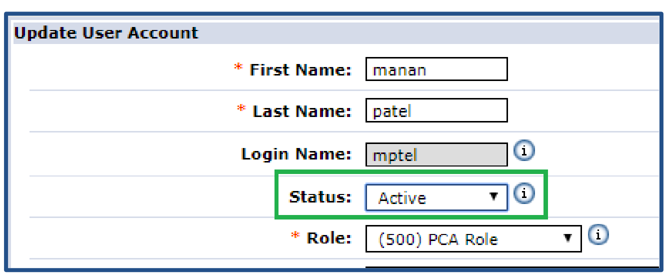
The Agency user receives an email with the link and instructions to reset their password. The User follows the prompts to reset their password accordingly. Refer to the [Self-Service Password Reset Job Aid](#) for further guidance and password requirements.



Reset Password Email

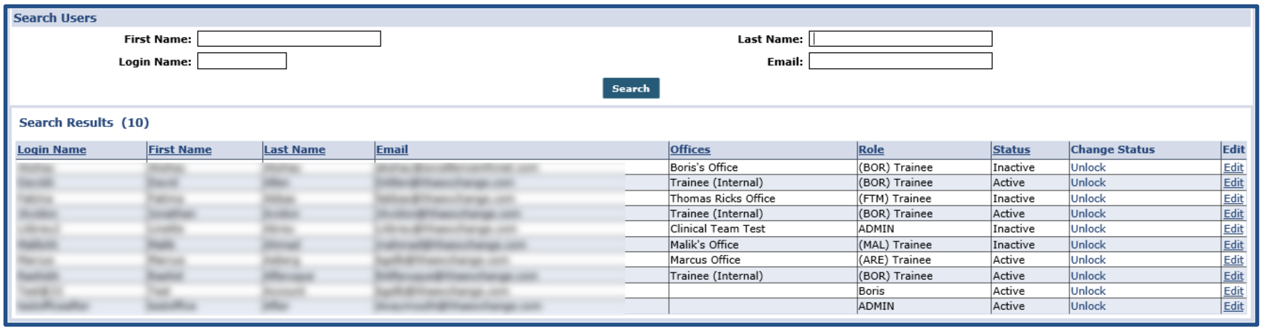
Deactivate User Account

Only roles with the **Inactivate Users** permission can deactivate a user; otherwise, the **Status** field is unavailable to edit.

Step	Action
1	Navigate to ***Admin > User Management > Search User***.
2	Click on the **Edit** link to access the *Update User Account* page.
3	From the **Status** field select *Inactive.*  **User Status**
4	Click ***Save***. Once saved, the user cannot access the system with given credentials.

User Search

To search for a User in the system, either enter the User's **First Name**, **Last Name**, **Login Name** or **Email** address to narrow a search or simply click on the ***Search*** button to view all Users.



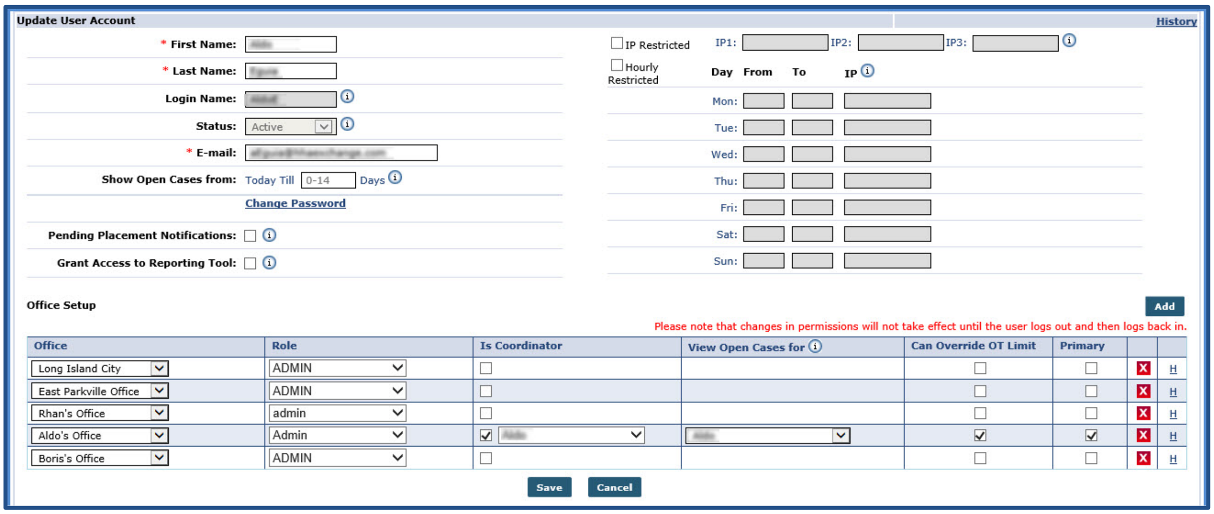
User Search

The Search Results include the following information per line item:

Column	Description
Login Name	User's HHAX login name
First Name	User's first name
Last Name	User's last name
Email	The email address associated with the user in the HHAX system.
Offices	All associated Offices the User is assigned to.
Role	Role(s) assigned to the User
Status	User Account Status (either *Active* or *Inactive*)
Change Status	Link allowing an Admin to unlock a User's Account
Edit	Link allowing an Admin to Edit a User's Profile

Update User Account

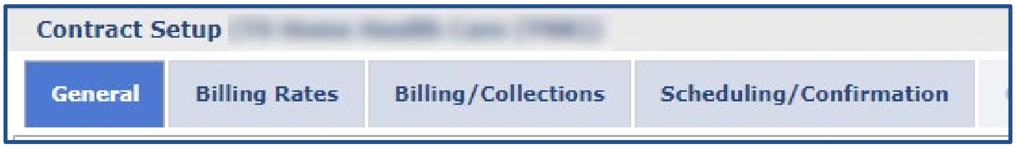
On the Search Results, click on the **Edit** link for the applicable User to open the *Update User Account* page, as illustrated in the image below. This page contains the user's information as entered when the profile was created, refer to the Creating New User section for field descriptions. From here, make the necessary edits, to include changing the Status, resetting the Password, applying restrictions, or editing Office Setup. Click ***Save*** to apply.



Update User Account

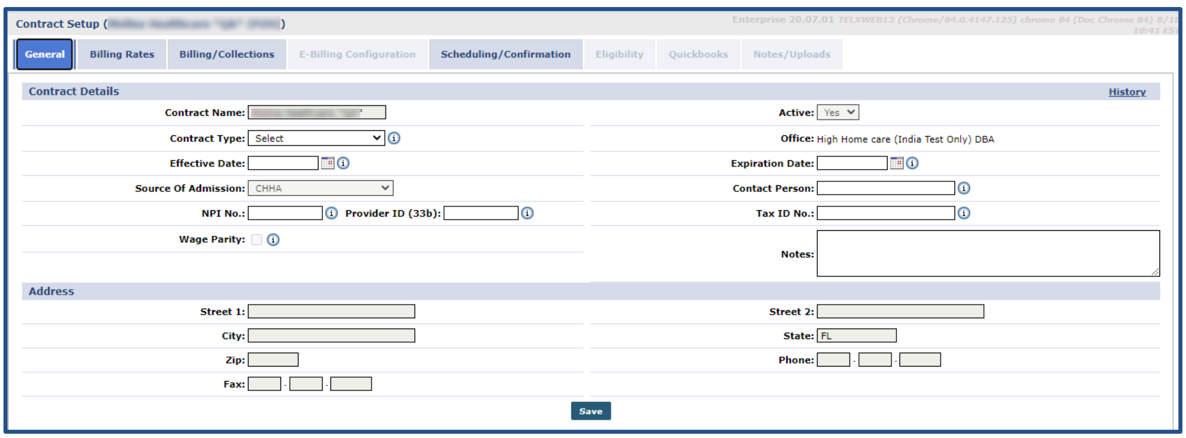
Contract Setup

The **Contract Setup** function is comprised of various tabs (pages) to optimize the organization of fields and information according to subject (as seen in the following image).



General

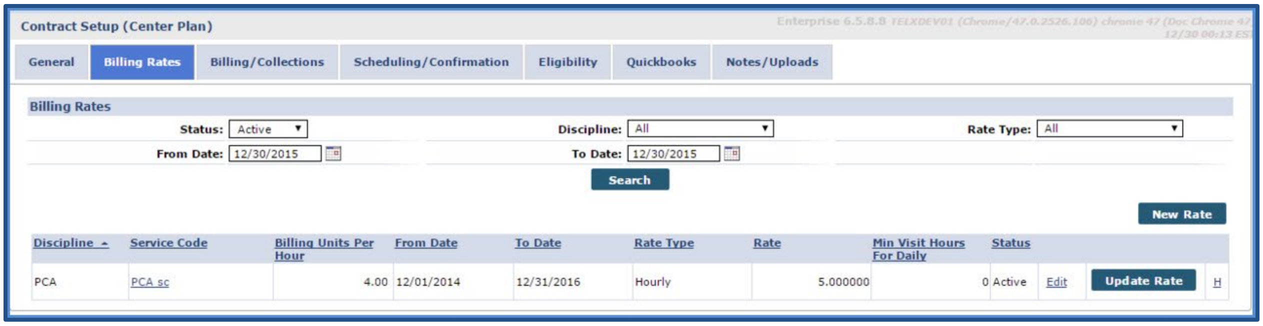
The **General** tab is used to view basic *Contract Details* as well as the Payer's *Address*, as illustrated in the following image.



General Page

Billing Rates

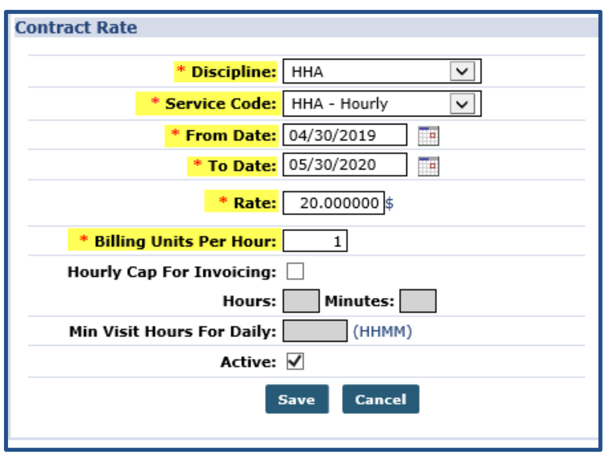
The **Billing Rates** page is used to create, review, and search for any Billing Rates associated with a Contract. Use the search filter fields or click the *Search* button to view existing Billing Rates. To add a new rate, click the ***New Rate*** button.



Billing Rates Page

The *Contract Rate* window opens. Complete the required fields as follows:

- ***Discipline:** Select the *Discipline* attached to the rate (Skilled/Non-Skilled)
- ***Service Code:** Designates the Discipline, Contract, Rate Type and Visit Type (as created in the Reference Table).
- ***From/To Date:** Select the effective date range.
- ***Rate:** The dollar amount to bill.
- ***Billing Units Per Hour:** Enter the number of billing units per hour.

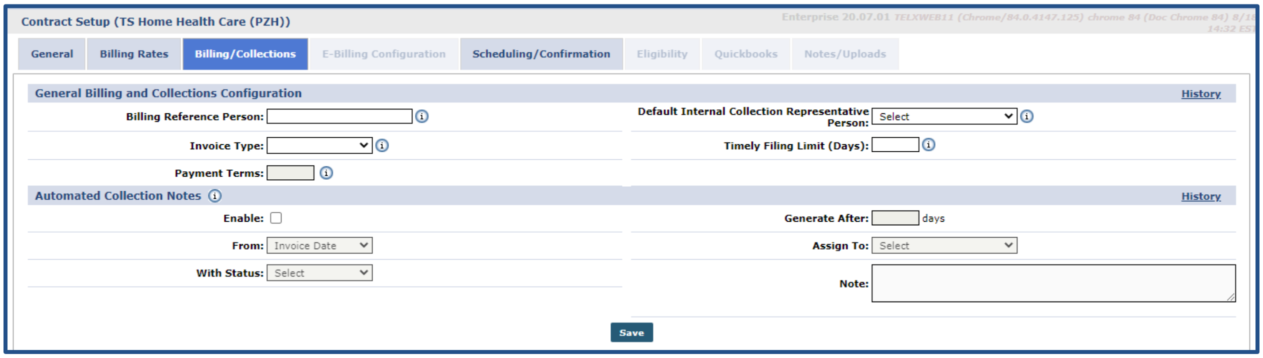


Contract Rate Window

Specify the duration of a visit in the **Min Visit Hours for Daily** for it to be considered a *Daily* visit. Click ***Save***.

Billing/Collections

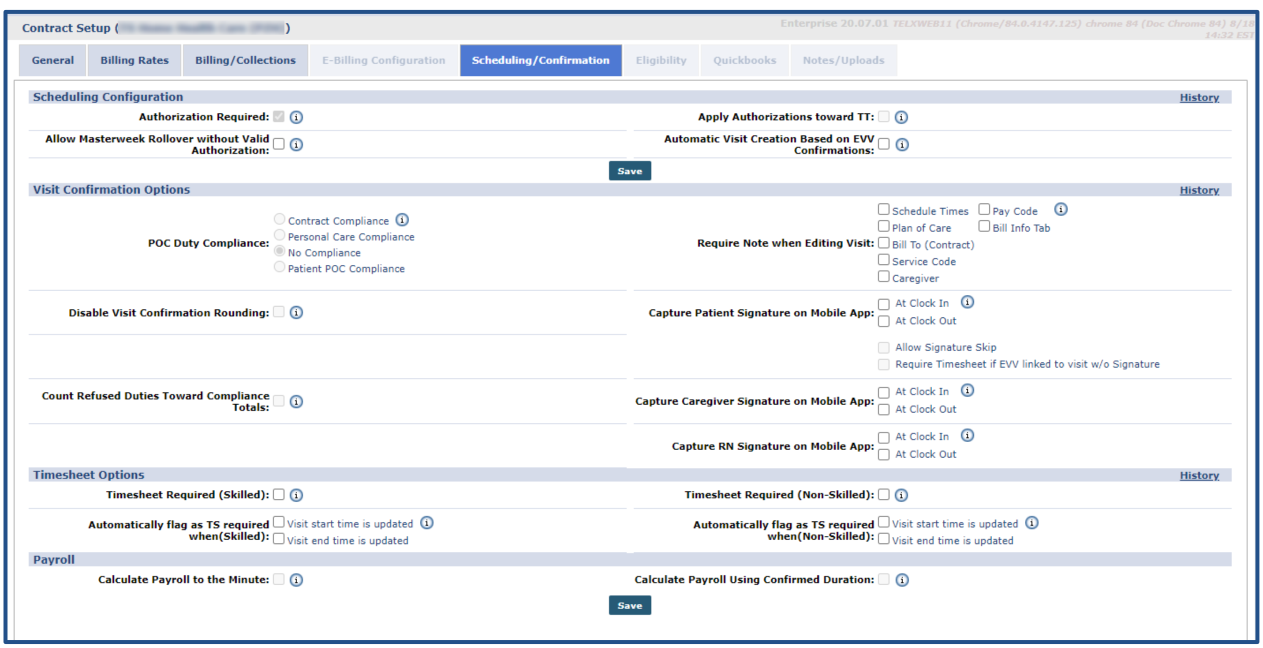
The **Billing/Collections** tab contains all fields related to invoicing and collections. This page is comprised of six sections to include: *General Billing and Collections Configurations*, *Contractual Discount Allowance*, *Invoice Organization*, *Prebilling Validations*, *Duty Sheet Printing Options*, and *Automated Collection Notes* settings.



Billing Collections Page

Scheduling/Confirmation

The **Scheduling/Confirmation** tab contains all fields related to scheduling and confirming visits. This page is comprised of four sections to include: *Scheduling Configurations, Visit Confirmation Options, Timesheet Options,* and *Payroll* settings (related to confirmation).



Scheduling/Confirmation Page

Agency Profile

The **Agency Profile** is used to capture an Agency's general information and internal structure as well as to set up a variety of functions and restrictions within the system. Refer to the [Admin Agency Profile Process Guide] for complete details and functionality.

Office Setup

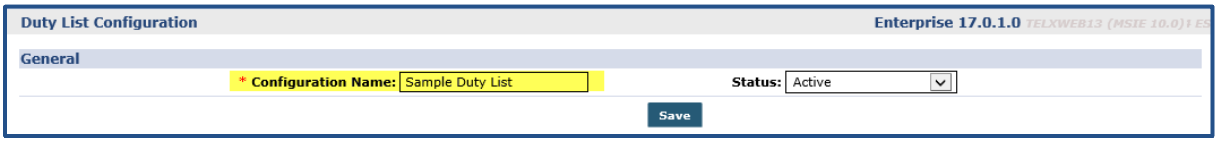
Use the Office Setup page to configure individual Offices within an Agency. Every Agency must have at least one Office. Refer to the Admin Office Setup Process Guide for complete details and functionality.

Duty List Setup

Use the **Duty List Setup** page to manage Plan of Care (POC) Duties.

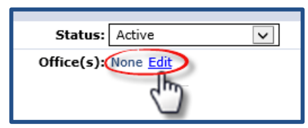
Creating a New Duty List

To create a new Duty List, click on the ***New*** button to open the *Duty List Configuration* page. Enter a **Configuration Name** in the field and select *Active* in the Status field. Click ***Save***.



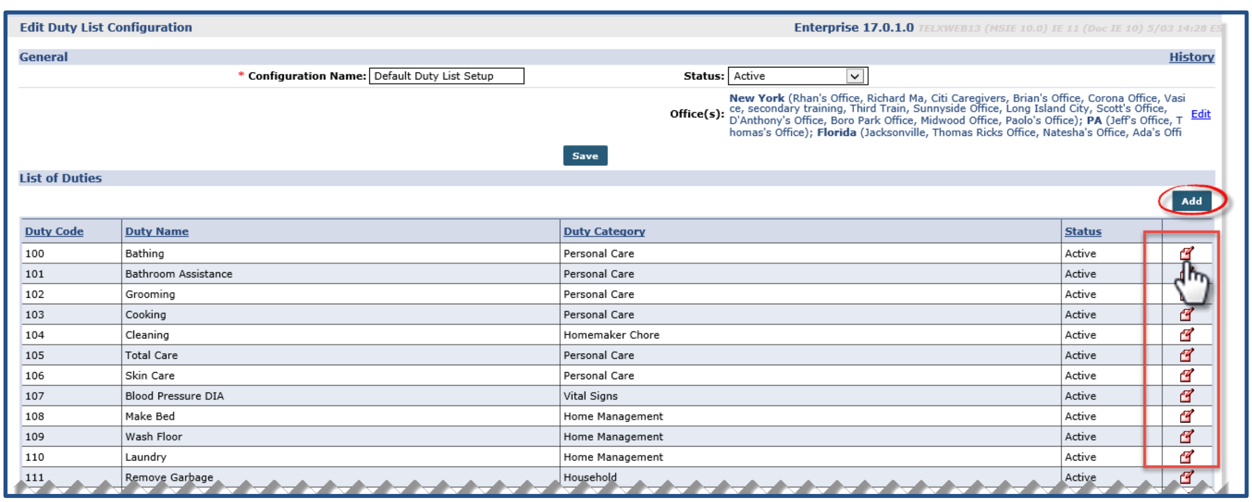
New Duty List

Once saved, the **Office(s)** field appears (under the **Status** field). Click the **Edit** link to assign Offices to the newly created Duty List.



Existing Duty List

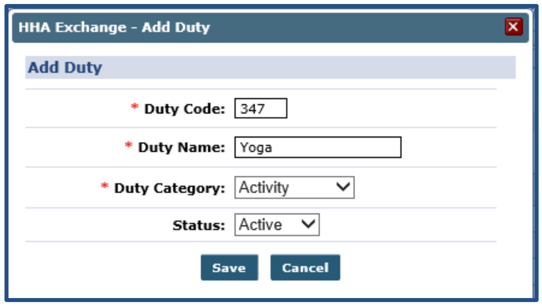
To access an existing Duty List, click the *Search* button to locate the applicable Duty List and click on the **Duty List Setup Name** (link) from the Search Results. Once selected, the *Edit Duty List Configuration* page opens. Click the ***Add*** button to add a new Duty or click on the edit icon to update an existing one.



Duty Code	Duty Name	Duty Category	Status
100	Bathing	Personal Care	Active
101	Bathroom Assistance	Personal Care	Active
102	Grooming	Personal Care	Active
103	Cooking	Personal Care	Active
104	Cleaning	Homemaker Chore	Active
105	Total Care	Personal Care	Active
106	Skin Care	Personal Care	Active
107	Blood Pressure DIA	Vital Signs	Active
108	Make Bed	Home Management	Active
109	Wash Floor	Home Management	Active
110	Laundry	Home Management	Active
111	Remove Garbage	Household	Active

Duty List Setup

To add a new Duty, click on the ***Add*** button to open the *Add Duty* window. Complete the required fields, denoted with red asterisks, as seen in the image below and described in the table underneath.



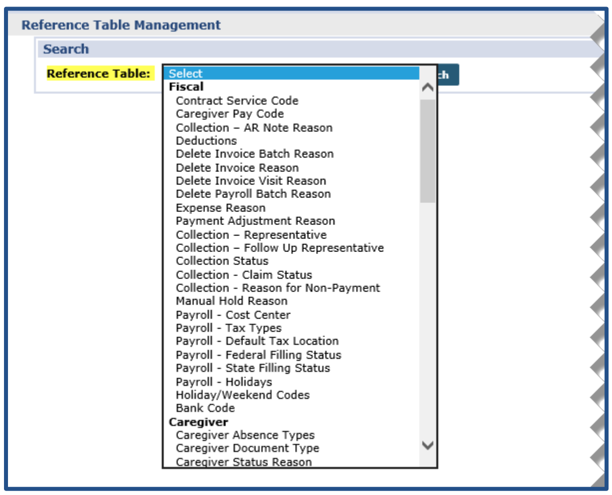
Add Duty

Field	Description
***Duty Code**	Enter a 3-digit code the Caregiver enters to register duty.
***Duty Name**	Enter the name of the duty.
***Duty Category**	Select the duty category.
Status	Select *Active* or *Inactive*.

Reference Table Management

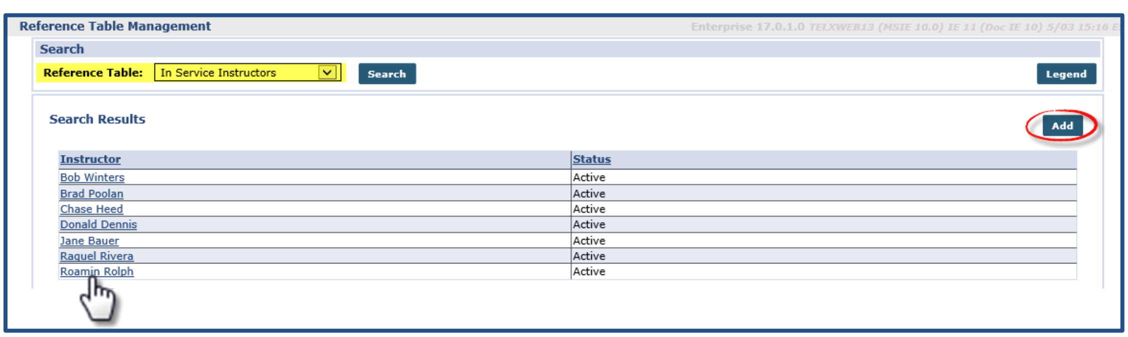
The **Reference Table Management** function is one of the most widely used features across the HHAX system. Multiple fields throughout the application are fed by the unique values created via Reference Tables (at the Agency level).

Numerous tables exist allowing users to create and update values. The fields required to create new values for each available field in the **Reference Table** dropdown may vary from item to item. Values created using this function are labeled as **Agency Default** on the Office Level Reference Table.



Reference Table Management

Creating and managing values is in the Reference Tables is standard in the system. Begin by searching for the applicable Reference Table (as seen in the image above). For example, the *In Service Instructors* table is selected (as illustrated below). Click on the ***Add*** button to add a value to the selected Reference Table or click on an existing value (**link**) to update.



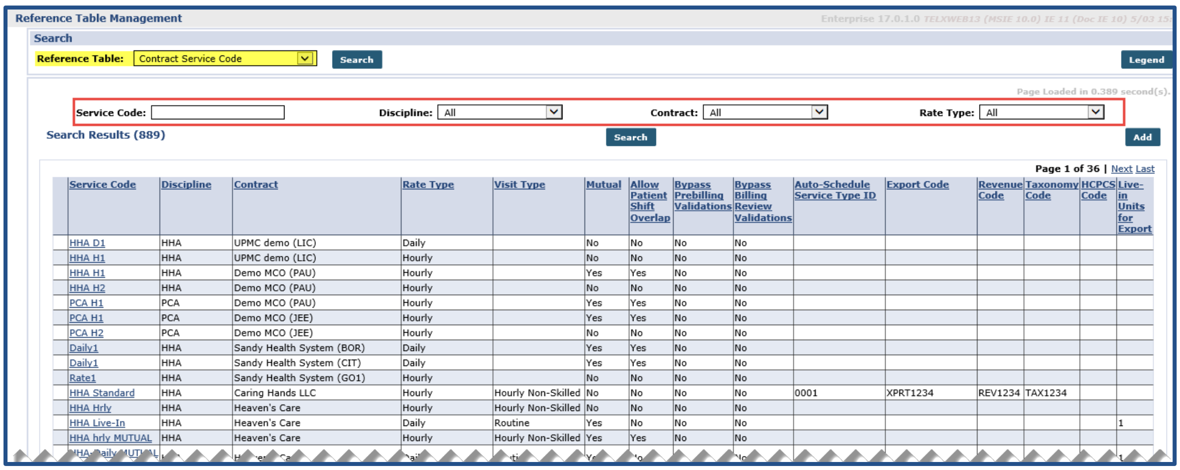
Reference Table: In Service Instructors

In the following example, a new **In Service Instructor** is added. Clicking the ***Add*** button opens the *In Service Instructor* window. Enter the **Instructor** (name) and ensure the **Status** is *Active*. Click ***Save***.

Adding In Service Instructor

Note: *For this example, the same mechanism applies when editing a value. The **Instructor** name can change as well as the **Status** can be changed from Active to Inactive.*

Some Reference Tables are comprehensive requiring more information. Upon accessing the Reference Table, the fields display as column items on the core page (as illustrated in the image below for the *Contract Service Code* **Reference Table**). In addition, these search filters can facilitate specific searches.


Reference Table Management

Enterprise 17.0.1.0 TELXWEB13 (MSIE 10.0) IE 11 (Doc IE 10) 5/03 15

Search

Reference Table: Contract Service Code | Search | Legend

Page Loaded in 0.389 second(s).

Service Code: | Discipline: All | Contract: All | Rate Type: All

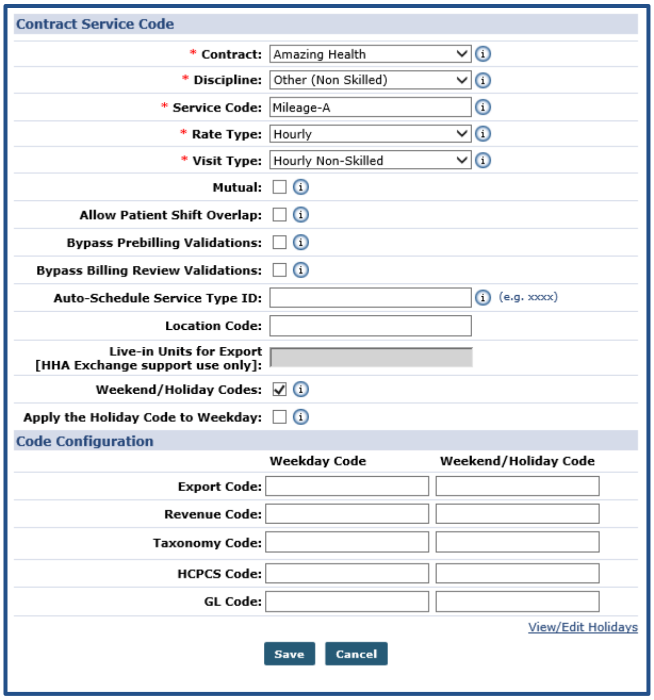
Search Results (889) | Search | Add

Page 1 of 36 | Next Last

Service Code	Discipline	Contract	Rate Type	Visit Type	Mutual	Allow Patient Shift Overlap	Bypass Prebilling Validations	Bypass Billing Review Validations	Auto-Schedule Service Type ID	Export Code	Revenue Code	Taxonomy Code	HCPCS Code	Live-in Units for Export
HHA D1	HHA	UPMC demo (LIC)	Daily		No	No	No	No						
HHA H1	HHA	UPMC demo (LIC)	Hourly		No	No	No	No						
HHA H1	HHA	Demo MCO (PAU)	Hourly		Yes	Yes	No	No						
HHA H2	HHA	Demo MCO (PAU)	Hourly		No	No	No	No						
PCA H1	PCA	Demo MCO (PAU)	Hourly		Yes	Yes	No	No						
PCA H1	PCA	Demo MCO (JEE)	Hourly		Yes	Yes	No	No						
PCA H2	PCA	Demo MCO (JEE)	Hourly		No	No	No	No						
Daily1	HHA	Sandy Health System (BOR)	Daily		Yes	Yes	No	No						
Daily1	HHA	Sandy Health System (CIT)	Daily		Yes	Yes	No	No						
Rate1	HHA	Sandy Health System (GO1)	Hourly		No	No	No	No						
HHA Standard	HHA	Caring Hands LLC	Hourly	Hourly Non-Skilled	No	No	No	No	0001	XPRT1234	REV1234	TAX1234		
HHA Hrly	HHA	Heaven's Care	Hourly	Hourly Non-Skilled	No	No	No	No						
HHA Live-In	HHA	Heaven's Care	Daily	Routine	Yes	No	No	No						1
HHA hrly MUTUAL	HHA	Heaven's Care	Hourly	Hourly Non-Skilled	Yes	Yes	No	No						

Reference Table: Contract Service Code

In the next example, adding a new value requires more information as seen in the image below (including required fields denoted with red asterisk). Once created, the field information entered in the window are seen in the respective columns (image above).

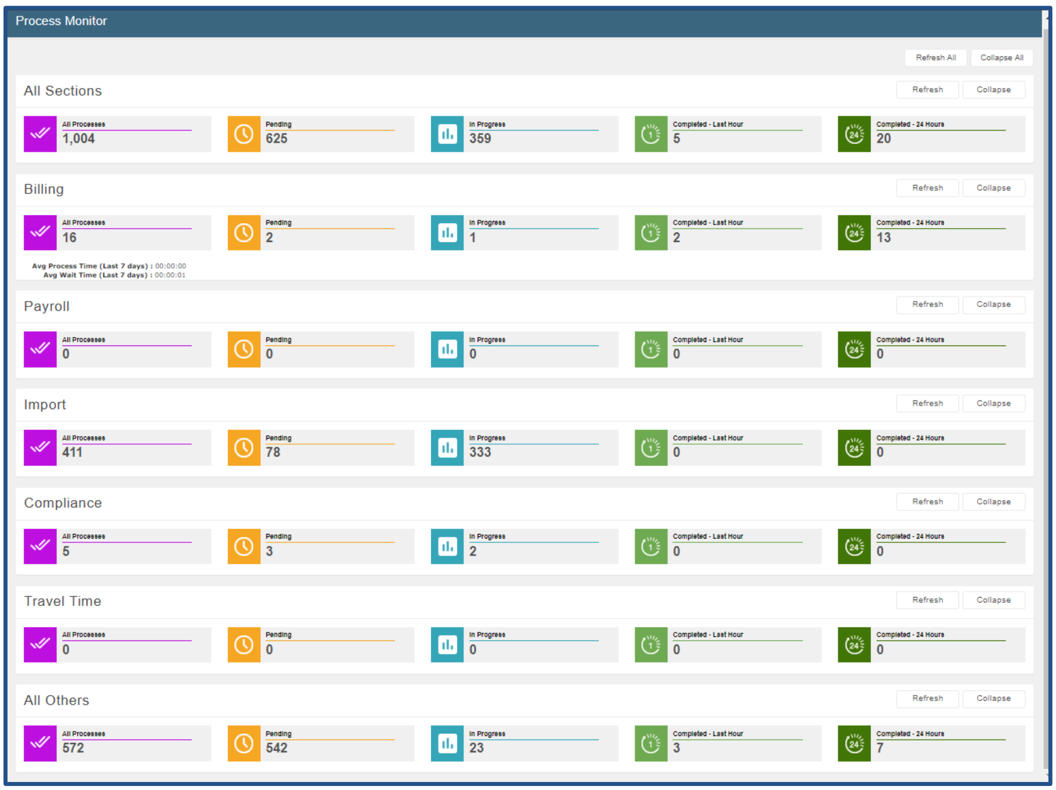


Contract Service Code Window

Process Monitor

The **Process Monitor** page offers real-time, updated data via a streamlined look segmenting the various processes into categories to include *All Sections*, *Billing*, *Payroll*, *Import*, *Compliance*, *Travel Time*, and *All Others*.

Refer to the [Process Monitor Job Aid] for full details and instructions.



Process Monitor Page