



Caregiver Management Process Guide

Provider User Guide

Document Revision History

Date	Description of Revision
09/24/2020	Initial version of the document
03/11/2021	Accessibility standards applied
08/10/2022	Update Caregiver Employment Types

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Overview

In HHAeXchange (HHAX), the term **Caregiver** refers to any individual who provides service to a Patient. Caregivers are classified as either Non-Skilled (or Non-licensed) aides or Skilled (Licensed) medical practitioners.

All Caregiver information, such as Demographics, Compliance Status, and Restrictions, are housed in the **Caregiver Profile**. Users with the proper permissions may review and edit this information as required. New **Caregiver Profiles** may be entered manually or imported via a compatible third-party software.

This process guide covers the Caregiver Profile as well as the entry of new Caregivers. Please direct any questions, thoughts, or concerns regarding the content herein to [HHAeXchange Client 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

Caregivers

Caregivers are the individuals providing service for Patients. Depending on the type of service provided, Caregivers are categorized as either Non-Skilled or Skilled employees. This section covers the setup and management of all Caregivers in the HHAX system.

Employment Types

Employment Type, Discipline, or Accepted Service (on the Patient’s side) refers to the type of service a Caregiver is authorized to provide in HHAX. The Caregiver’s **Employment Type** is a scheduling criterion used in Authorizations to ensure that a Patient receives proper service.

The **Employment Type** is a required field when creating a **New Caregiver** (discussed later in this document). A Caregiver who does not match the **Discipline** specified in an **Authorization** cannot be scheduled, unless it is a Skilled Caregiver being scheduled for a Non-Skilled Visit. Selecting one or more of the values in this field indicates that the Caregiver is certified to work in that capacity. The following is a comprehensive Employment Type list per Category (Skilled and Non-Skilled).

Skilled Caregivers

Medical professionals who provide therapy or examinations to assess the Member’s state of wellbeing, to include:

- LPN (Licensed Practical Nurse)
- MSW (Medical Social Worker)
- NINS (Nursing Instructor)
- NT (Nutritionist)
- OT (Occupational Therapist)
- PT (Physical Therapist)
- **RN** (Registered Nurse)
- **RT** (Respiratory Therapist)
- **SCI** (Service Coordinator – Initial)

- **SCM** (Service Coordinator – Monthly Billing)
- **ST** (Speech Therapist)
- **Other Skilled** (Any other Skilled discipline)

Non-Skilled Caregivers

Individuals who tend to a Member's basic needs, observes and records their condition, and ensures that the Member receives help in a timely manner (in cases of emergency). Non-Skilled Employment Types include:

- **APC** (Advanced Personal Care)
- **CBSA** (Community Based Support Aide)
- **CH** (Chore)
- **CNA** (Certified Nursing Assistant)
- **COMP** (Companion)
- **ESC** (Escort)
- **HCSS** (Home and Community Support Services)
- **HHA** (Home Health Aide)
- **HMK** (Homemaker)
- **HSK** (Housekeeper)
- **ILST** (Independent Life Skill Training)
- **PA** (Personal Assistant)
- **PBIS** (Positive Behavioral Intervention & Support)
- **PC** (Personal Care)
- **PCA** (Personal Care Assistant)
- **RESP** (Respite)
- **SCH** (Supportive Homecare Aid)
- **SDP** (Structured Day Program)
- **SHHA** (Supportive Home Health Aide)

- **SPC** (Supportive Personal Care)
- **Other Non-Skilled** (Any other Non-Skilled discipline)

The Caregiver Profile

The **Caregiver Profile** is used to manage Caregiver information. The Caregiver Profile has 4 permission-based pages to include the *Profile*, *Calendar*, and *Visits* (as illustrated on the image to the right).

Using the Index (left navigation section, as shown in the image), users can navigate to different pages within the Caregiver’s profile. This section provides a high-level overview of the pages and the functionalities within.



Caregiver Info Left Navigation Index

The *Profile* Page

The **Profile** page contains a Caregiver’s *Demographics*, *Employment Information*, *Address*, *Emergency Contact Information*, and *Notification Preferences*. The top portion of the Profile shows the Caregiver’s essential details to include Status.

Caregiver Info Active

Name: Miller Linda

Team: Select

Address: 123 Anywhere Road
NEW YORK, NY, 10001

Caregiver Code: PZH-1006

Vendor: High Home Care (India Test Only) DBA

Languages: English, Spanish

Office: High Home care (India Test Only) DBA

Phone:

DOB: 10/01/1980

Caregiver Hours: H: 0
V: 0

Profile Profile Log Print Profile

Demographics History

* **First Name:** Linda

* **Last Name:** Miller

* **Gender:** Female

* **Caregiver Code:** PZH-1006

Caregiver Mobile/Portal ID:

Alt. Caregiver Code:

* **SSN#:** 555-55-5555

Rehire: No **Rehire Date:**

Marital Status: Married

Dependents:

Middle Name:

* **Initials:** LM

* **DOB:** 10/01/1980

Time & Att. PIN: 100006

Mobile/Portal ID Type:

Mobile Device ID:

Ethnicity:

Country of Birth:

Picture:

Secondary Offices:

Employment Info History

* **Type:** Employee H

* **Employment Type:** RN, LPN, Other (Skilled)

* **Application Date:** 09/01/2019

Hire Date:

First Work Date:

Last Work Date:

HHA/PCA Registry Number:

Professional License Number: LMNOP-123

Referral Source: Employee Referral

NYC Registry checks:

Exclusion/Verification Lists Checked On:

* **Status:** Active H

Reason:

Notes:

Employee ID:

Team:

Location:

Branch:

Payer:

Added/Checked Registry Date:

NPI Number:

Referral Person:

Signed Payroll Agreement: No **Date:**

Address History

Street 1: 123 Anywhere Road

* **Zip:** 10001 [Map It](#) **Zip4:**

State: NY

Phone 2: 347-222-3333

Street 2:

City: NEW YORK

Home Phone:

Phone 3:

Emergency Contact Information History

Name: John Miller

Address: 123 Anywhere Road

Phone 2: 347-333-3333

Name:

Address:

Phone 2:

Relationship: Significant Other

Phone 1:

Relationship:

Phone 1:

Edit

Caregiver Profile Page

Once the Caregiver Profile is created, a **Caregiver Code** and a **Time & Attendance PIN** (also referred to as an **Assignment ID**), defined as follows:

Field	Description
Caregiver Code	Primary reference number for the Caregiver in the HHAX system.
Time & Attendance PIN	Each Caregiver is assigned a unique 6-digit Time & Attendance PIN , (also known as the “EVV Identification”), which is auto-generated when the Caregiver Profile is created. This pin is used to validate the source of phone-based EVV.

Furthermore, users can add new information or edit existing details. An **Active** Status allows users to schedule Caregivers for service.

Read-Only Fields in Caregiver Profile Page

A number of Caregiver Profile fields (listed below) are read-only unless the user-role has been granted permission to edit and save.

- First Name
- Middle Name
- Last Name
- SSN #
- Gender
- Ethnicity
- DOB
- Alt. Caregiver Code
- Hire Date

To enable editing permissions for a user, navigate to **Admin > User Management > Edit Roles**. Select *Aide* from the **Section** dropdown field, and applicable roles from the **Roles** dropdown field. Scroll to the *Search Aid* category and enable applicable permissions.

The Calendar Page

The Caregiver *Calendar* page is used to schedule new visits, or review visits that the Caregiver was assigned to from the Patient's Calendar. While the Caregiver's Calendar mirrors a Patient's calendar, scheduled visits do not appear in green or pink as Authorizations apply to Patients.

For more information regarding scheduling visits and the icons seen on the page, refer to the Patient's Calendar or the [Scheduling Visits Process Guide](#).

A Caregiver's weekly schedule can be printed directly from the Caregiver's calendar. When an event is added to the Caregiver Calendar, the Print icon is enabled. Click on the print icon (on the right-most column) as seen on the image below. To print the entire month, click on the **Print** button on the top-right. The print icon is unavailable for weeks with no visits scheduled.

Printing a Calendar Schedule

The image below illustrates a Caregiver's printed weekly schedule.

Caregiver's Weekly Schedule

The Visits Page

The *Visits* page is used to search for scheduled or confirmed visits that apply to the Caregiver. Use the search fields available to generate results. Fields denoted with asterisks are required (as pictured in the following image).

Date	Disc.	Patient Name	Sch. Time	Sch. Duration	Bill to	P.SC	B.T.	Billed
09/24/2020	Other (Non Skilled)	Lawrence Vertie	0900 - 1700	08:00	TS Home Health	S5120	H Save X	No
09/25/2020	Other (Non Skilled)	Lawrence Vertie	0900 - 1700	08:00	TS Home Health	S5120	H Save X	No
09/28/2020	Other (Non Skilled)	Lawrence Vertie	0900 - 1700	08:00	TS Home Health	S5120	H Save X	No
09/29/2020	Other (Non Skilled)	Lawrence Vertie	0900 - 1700	08:00	TS Home Health	S5120	H Save X	No
09/30/2020	Other (Non Skilled)	Lawrence Vertie	0900 - 1700	08:00	TS Home Health	S5120	H Save X	No

Caregiver Visits Page

Creating a New Caregiver

To create a **New Caregiver**, complete the following steps.

Step	Action
1	Navigate to Caregiver > New Caregiver .
2	<p>From the required Primary Office field, select the Office employing and managing the Caregiver. If the Agency has only one Office, the field is pre-populated (as illustrated). This field must be selected to continue.</p> <div data-bbox="505 621 1235 743" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">New Caregiver</p> <p style="text-align: center;">* Primary Office: High Home care ▼</p> </div> <p style="text-align: center;">Caregiver's Primary Office</p>
3	<p>Complete all required fields in the <i>Demographics</i> section (denoted with a red asterisk).</p> <div data-bbox="342 867 1403 1113" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 90%;"> <p>Demographics</p> <p>* First Name: Beth Middle Name: <input type="text"/></p> <p>* Last Name: Boyd * Initials: BB</p> <p>* Gender: Female * DOB: 5/28/1980</p> <p>Dependents: <input type="text"/> Alt. Caregiver Code: <input type="text"/></p> <p>* SSN#: 111-22-3333 Ethnicity: Select</p> <p><small>(e.g. xxx-xx-xxxx)</small></p> <p>Caregiver Mobile/Portal ID: <input type="text"/> Mobile/Portal ID Type: Select</p> <p>Rehire: <input type="checkbox"/> Rehire Date: <input type="text"/> Mobile Device ID: <input type="text"/></p> <p>Marital Status: Select Country of Birth: <input type="text"/></p> </div> <p style="text-align: center;">New Caregiver Demographics section</p> <p>Note: If a Caregiver was previously employed by the Agency, the original Profile is marked as Terminated. To prevent duplication of the SSN, select the Rehire checkbox and enter the Rehire Date. This allows entry of multiple records with the same SSN.</p>

Step	Action
4	<p>In the <i>Employment Info</i> section, select the applicable Employment Type as described in the Employment Type section. Select the Application Date. Prior to selecting the Status field, the Type field must be selected.</p> <div data-bbox="318 407 1419 982" style="border: 1px solid #ccc; padding: 10px;"> <p>Employment Info</p> <p>Referral Source: <input type="text" value="Select"/></p> <p>* Employment Type:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> PCA <input checked="" type="checkbox"/> HHA <input type="checkbox"/> RN <input type="checkbox"/> LPN <input type="checkbox"/> PT <input type="checkbox"/> OT <input type="checkbox"/> ST <input type="checkbox"/> MSW <input checked="" type="checkbox"/> HSK <input type="checkbox"/> HMK <input type="checkbox"/> NT <input type="checkbox"/> RT <input checked="" type="checkbox"/> PA <input type="checkbox"/> HCSS <input type="checkbox"/> CNA <input type="checkbox"/> COMP <input type="checkbox"/> APC <input type="checkbox"/> SCM <input type="checkbox"/> SCI <input type="checkbox"/> ILST <input type="checkbox"/> PBIS <input type="checkbox"/> RESP <input type="checkbox"/> ESC <input type="checkbox"/> SDP <input type="checkbox"/> CBSA <input type="checkbox"/> Other (Non Skilled) <input type="checkbox"/> Other (Skilled) <input type="checkbox"/> PC <input type="checkbox"/> CH <input type="checkbox"/> SPC <input type="checkbox"/> SHHA <input type="checkbox"/> SHC <p>Referral Person: <input type="text"/></p> <p>* Type: <input type="text" value="Employee"/></p> <p>Employee ID: <input type="text"/></p> <p>HHA/PCA Registry Number: <input type="text"/></p> <p>Professional License Number: <input type="text"/></p> <p>NYC Registry References Checked On: <input type="text"/></p> <p>Location: <input type="text" value="Select"/></p> <p>* Application Date: <input type="text" value="08/03/2020"/></p> <p>* Status: <input type="text" value="Active"/></p> <p>Reason: <input type="text" value="Select"/></p> <p>Notes: <input type="text"/></p> <p>Signed Payroll Agreement: <input type="checkbox"/></p> <p>Added/Checked Registry Date: <input type="text"/></p> <p>NPI Number: <input type="text"/></p> <p>Team: <input type="text" value="Select"/></p> <p>Branch: <input type="text" value="Select"/></p> </div> <p style="text-align: center;">New Caregiver Employment Info section</p> <p>Note: Caregivers must be marked as Employee (under Type field) to be assigned to cases. Caregivers marked as Applicant cannot be scheduled.</p>
5	<p>Complete the remaining sections to include <i>Address, Emergency Contact Information, and Caregiver Preferences</i>. Although these sections are not required to create the Profile, HHAX recommends completing as much information as possible which may be needed to schedule and broadcast.</p>
6	<p>Click the Save button to complete the Profile.</p> <div data-bbox="383 1423 1357 1644" style="border: 1px solid #ccc; padding: 10px;"> <p>Address</p> <p>Street 1: <input type="text" value="456 Seventh Street"/> Street 2: <input type="text"/></p> <p>* Zip: <input type="text" value="10012"/> Zip4: <input type="text"/></p> <p>City: <input type="text" value="NEW YORK"/></p> <p>Other: <input type="text"/></p> <p style="font-size: small;">(Upto 250 Characters)</p> <p style="text-align: center;"><input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p style="text-align: center;">Save New Caregiver Profile</p>
7	<p>Once complete, the Status is Active (as illustrated in the image below).</p> <div data-bbox="375 1766 1360 1892" style="border: 1px solid #ccc; padding: 10px;"> <p>Caregiver Info Active</p> <p>Name: Boyd Beth Caregiver Code: PZH-1007 Office: High Home care</p> <p>Team: Vendor: High Home Care Phone: 347-777-7777</p> <p>Address: 456 Seventh Street Languages: English, French, Italian DOB: 05/28/1980</p> <p>NEW YORK, NY, 10012 Caregiver Hours: H: 0 V: 0</p> </div> <p style="text-align: center;">Active Caregivers</p>

Searching for a Caregiver

Complete the following steps to search for a Caregiver.

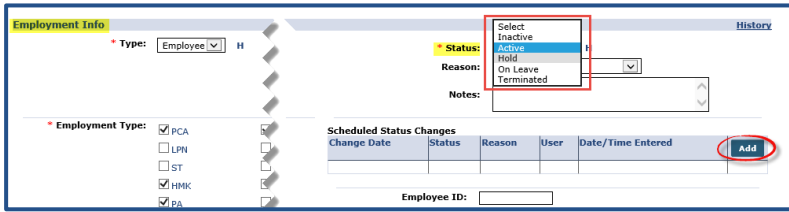
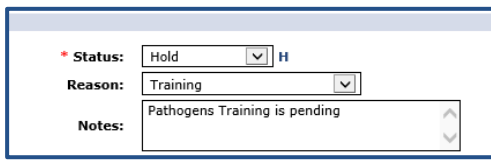
Step	Action																																																																																								
1	Navigate to Caregiver > Caregiver Search .																																																																																								
2	Use the filter fields to refine the search results and click the Search button. <div data-bbox="321 520 1425 819" data-label="Complex-Block"> <p>The screenshot shows the 'Caregiver Search' form with the following fields: Last Name, First Name, Office(s), Type, Caregiver Code, Alt. Caregiver Code, SSN, Status, Discipline, Team, Location, Branch, and Phone Number. A 'Search' button is located below the filters. Below the search results, there is a table with 7 results.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Code</th> <th>Office(s)</th> <th>Alt. Caregiver Code</th> <th>SSN</th> <th>Date of Birth</th> <th>Phone</th> <th>Type</th> <th>Team</th> <th>Status</th> <th>Discipline</th> </tr> </thead> <tbody> <tr> <td>Bovd, Beth</td> <td>PZH-1007</td> <td>High Home care</td> <td></td> <td>111-22-3333</td> <td>05/28/1980</td> <td>347-777-7777,347-444-5555</td> <td>Employee</td> <td></td> <td>Active</td> <td>PCA, HHA, HSK, PA</td> </tr> <tr> <td>Hamilton, Ashley</td> <td>PZH-1003</td> <td>High Home care</td> <td></td> <td>273-77-7772</td> <td>09/08/1978</td> <td>718-388-8222,</td> <td>Employee</td> <td></td> <td>Active</td> <td>Other (Non Skilled)</td> </tr> <tr> <td>Hamilton, Ben</td> <td>PZH-1005</td> <td>High Home care</td> <td></td> <td>888-66-6777</td> <td>09/03/1978</td> <td></td> <td>Employee</td> <td></td> <td>Active</td> <td>Other (Non Skilled)</td> </tr> <tr> <td>Hamilton, Dan</td> <td>PZH-1001</td> <td>High Home care</td> <td></td> <td>083-84-7747</td> <td>09/03/1978</td> <td>347-994-9333,</td> <td>Employee</td> <td></td> <td>Active</td> <td>Other (Skilled)</td> </tr> <tr> <td>Hamilton, Kip</td> <td>PZH-1002</td> <td>High Home care</td> <td></td> <td>092-34-8109</td> <td>09/03/1987</td> <td>646-696-0007,</td> <td>Employee</td> <td></td> <td>Active</td> <td>Other (Non Skilled)</td> </tr> <tr> <td>Zimmerman, Eleanor</td> <td>PZH-1004</td> <td>High Home care</td> <td></td> <td>354-44-7647</td> <td>08/04/1982</td> <td></td> <td>Employee</td> <td></td> <td>Active</td> <td>Other (Non Skilled)</td> </tr> <tr> <td>Miller, Linda</td> <td>PZH-1006</td> <td>High Home care</td> <td></td> <td>555-55-5555</td> <td>10/01/1980</td> <td>347-222-3333</td> <td>Employee</td> <td></td> <td>Active</td> <td>RN, LPN, Other (Skilled)</td> </tr> </tbody> </table> </div>	Name	Code	Office(s)	Alt. Caregiver Code	SSN	Date of Birth	Phone	Type	Team	Status	Discipline	Bovd, Beth	PZH-1007	High Home care		111-22-3333	05/28/1980	347-777-7777,347-444-5555	Employee		Active	PCA, HHA, HSK, PA	Hamilton, Ashley	PZH-1003	High Home care		273-77-7772	09/08/1978	718-388-8222,	Employee		Active	Other (Non Skilled)	Hamilton, Ben	PZH-1005	High Home care		888-66-6777	09/03/1978		Employee		Active	Other (Non Skilled)	Hamilton, Dan	PZH-1001	High Home care		083-84-7747	09/03/1978	347-994-9333,	Employee		Active	Other (Skilled)	Hamilton, Kip	PZH-1002	High Home care		092-34-8109	09/03/1987	646-696-0007,	Employee		Active	Other (Non Skilled)	Zimmerman, Eleanor	PZH-1004	High Home care		354-44-7647	08/04/1982		Employee		Active	Other (Non Skilled)	Miller, Linda	PZH-1006	High Home care		555-55-5555	10/01/1980	347-222-3333	Employee		Active	RN, LPN, Other (Skilled)
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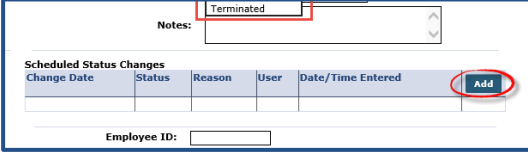
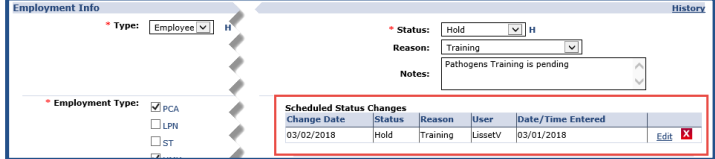
Caregiver Status

The **Caregiver Status** is the determining factor when scheduling a Caregiver to provide service. Use the **Caregiver Status** function to track employment status in the system to ensure that only authorized, available Caregivers are scheduled.

Status	Description
Active	Caregiver is authorized and available to provide service. Caregivers listed as <i>Active</i> <u>may be scheduled for visits</u> .
Inactive	Status categories include Inactive, Hold, On Leave, and Terminated . These status categories are assigned as applicable and at the Agency’s discretion. A Caregiver with any of these statuses <u>cannot be scheduled for visits</u> .

Follow the steps outlined below to change a Caregiver Status in the system.

Step	Action
1	Navigate to Caregiver > Caregiver Search .
2	Select the <u>Profile</u> link from the Index. On the Profile page, click the Edit button at the bottom of the page.
3	<p>Scroll to the <i>Employment Info</i> section. Select the applicable status from the Status field (as illustrated in the image).</p>  <p style="text-align: center;">Changing Caregiver Status</p>
4	<p>(Optional) Enter a Reason (set up in the <i>Caregiver Status Reason</i> Reference Table) and Note when changing a Caregiver’s Status, to provide a complete record for the employment status change.</p>  <p style="text-align: center;">Status, Reason, and Notes</p>
5	(Optional) In the Scheduled Status Changes grid, click the Add button to schedule the Status change and complete the required fields.

Step	Action																								
	 <p>Notes: <input type="text" value="Terminated"/></p> <p>Scheduled Status Changes</p> <table border="1"> <thead> <tr> <th>Change Date</th> <th>Status</th> <th>Reason</th> <th>User</th> <th>Date/Time Entered</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Add</td> </tr> </tbody> </table> <p>Employee ID: <input type="text"/></p>  <p>Employment Info</p> <p>Type: <input type="text" value="Employee"/> H</p> <p>Status: <input type="text" value="Hold"/> H</p> <p>Reason: <input type="text" value="Training"/></p> <p>Notes: Pathogens Training is pending</p> <p>Employment Type: <input checked="" type="checkbox"/> PCA <input type="checkbox"/> LPN <input type="checkbox"/> ST</p> <p>Scheduled Status Changes</p> <table border="1"> <thead> <tr> <th>Change Date</th> <th>Status</th> <th>Reason</th> <th>User</th> <th>Date/Time Entered</th> <th></th> </tr> </thead> <tbody> <tr> <td>03/02/2018</td> <td>Hold</td> <td>Training</td> <td>Lissetv</td> <td>03/01/2018</td> <td>Edit X</td> </tr> </tbody> </table> <p style="text-align: center;">Scheduled Status Change</p>	Change Date	Status	Reason	User	Date/Time Entered							Add	Change Date	Status	Reason	User	Date/Time Entered		03/02/2018	Hold	Training	Lissetv	03/01/2018	Edit X
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6	Click the Save button to finalize.																								