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 *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).

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	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. **Caregiver's Primary Office**
3	Complete all required fields in the *Demographics* section (denoted with a red asterisk). **New Caregiver Demographics section** ***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.*

Step	Action
4	In the *Employment Info* 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. **New Caregiver Employement Info section** *Note: Caregivers must be marked as **Employee** (under **Type** field) to be assigned to cases. Caregivers marked as **Applicant** cannot be scheduled.*
5	Complete the remaining sections to include *Address*, *Emergency Contact Information*, and *Caregiver Preferences*. 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.
6	Click the **Save** button to complete the Profile. **Save New Caregiver Profile**
7	Once complete, the Status is **Active** (as illustrated in the image below). **Active Caregivers**

Searching for a Caregiver

Complete the following steps to search for a Caregiver.
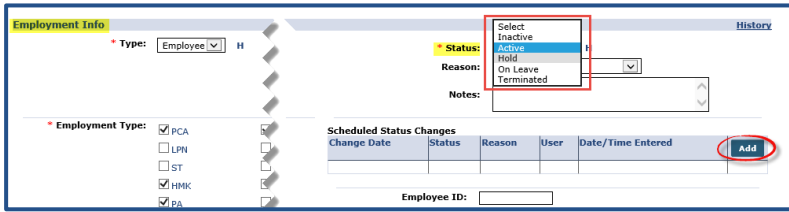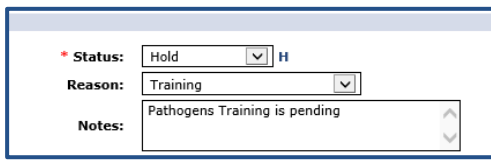
Step	Action
1	Navigate to *Caregiver > Caregiver Search*.
2	Use the filter fields to refine the search results and click the *Search* button. **Caregiver Search Filters**
3	In the results, click on the Caregiver's Name to access their Profile.

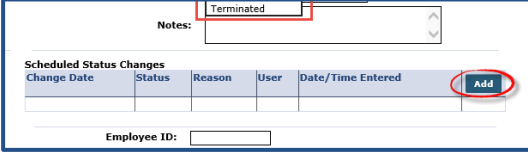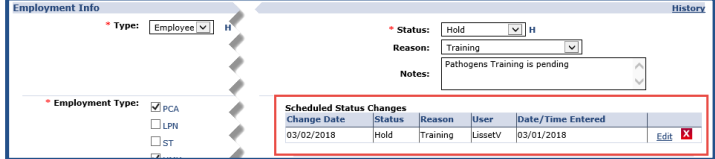

Caregiver Status

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 *Active* may be scheduled for visits.
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 cannot be scheduled for visits.

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

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

Step	Action
	Scheduled Status Change
6	Click the ***Save*** button to finalize.