



# Reporting 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

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## Overview

Compile and review data in a structured format using the **Reporting** function in HHAeXchange (HHAX). Each report is designed to return results on specific topics (such as Invoice Batch details) and may be refined using the available filter fields.

All HHAX **Reports** operate in a similar manner providing search filters for most, while others require entered values before generating. This process guide covers the reporting function in the 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
<b>Patient</b>	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
<b>Caregiver</b>	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
<b>Provider</b>	Refers to the Agency or organization coordinating services.
<b>Payer</b>	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
<b>HHAX</b>	Acronym for HHAeXchange

# Reports

There are various report types available in the HHAX system, from Patients to Caregivers to Billing, among several others. Reports are generated by navigating to the **Report** module in the system and selecting the intended section and subsections.



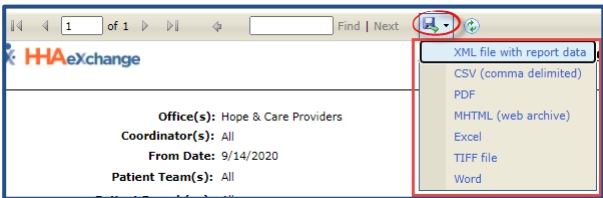
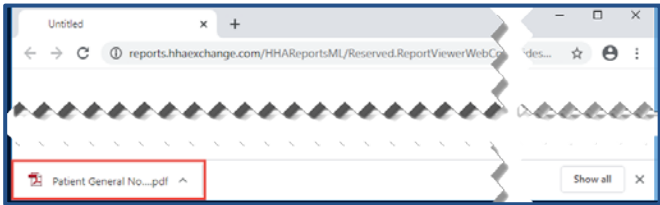
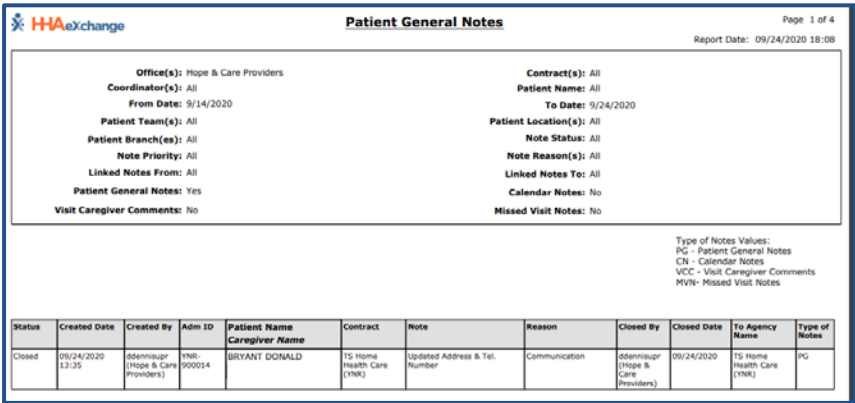
## Generating a Report

The following table provides guidance on how to generate a Report in the HHAX system. For this example, a Provider is seeking general information on a Patient.

Step	Action																																				
1	Navigate to the desired report; in this case, <b>Report &gt; Other Reports &gt; Patient General Notes</b>																																				
2	<p>In this example, the <i>HHAX Report Center</i> window opens to the <b>Patient General Notes</b> report page providing report filters. The <b>From Date</b> and <b>To Date</b> fields are required (as illustrated in the image below). Select a date range and any other optional field. Click the <b>View Report</b> button to run.</p> <p style="text-align: center;"><b>HHAX Report Center – Patient General Notes</b></p>																																				
3	<p>Once the system compiles the data, a completed report opens in a new window. In the example below, there are 4 sections as described below the image.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Created Date</th> <th>Created By</th> <th>Adm ID</th> <th>Patient Name Caregiver Name</th> <th>Contract</th> <th>Note</th> <th>Reason</th> <th>Closed By</th> <th>Closed Date</th> <th>To Agency</th> <th>Type of Notes</th> </tr> </thead> <tbody> <tr> <td>Closed</td> <td>09/24/2020 13:35</td> <td>66annsupr (Hope &amp; Care Providers)</td> <td>VNR-900014</td> <td>BRYANT DONALD</td> <td>TS Home Health Care (VNR)</td> <td>Updated Address &amp; Tel. Number</td> <td>Communication</td> <td>66annsupr (Hope &amp; Care Providers)</td> <td>09/24/2020</td> <td>TS Home Health Care (VNR)</td> <td>PG</td> </tr> <tr> <td>Open</td> <td>09/23/2020 12:50</td> <td>Alpahr24 (TS Home Health Care)</td> <td>VNR-900010</td> <td>CARNEY WILLIAM</td> <td>TS Home Health Care (VNR)</td> <td>Authorization (17557866_Auth1) has been added by TS Home Health Care. The following fields have been updated: Group Dep</td> <td>Authorization Edit</td> <td></td> <td></td> <td>Hope &amp; Care Providers</td> <td>PG</td> </tr> </tbody> </table>	Status	Created Date	Created By	Adm ID	Patient Name Caregiver Name	Contract	Note	Reason	Closed By	Closed Date	To Agency	Type of Notes	Closed	09/24/2020 13:35	66annsupr (Hope & Care Providers)	VNR-900014	BRYANT DONALD	TS Home Health Care (VNR)	Updated Address & Tel. Number	Communication	66annsupr (Hope & Care Providers)	09/24/2020	TS Home Health Care (VNR)	PG	Open	09/23/2020 12:50	Alpahr24 (TS Home Health Care)	VNR-900010	CARNEY WILLIAM	TS Home Health Care (VNR)	Authorization (17557866_Auth1) has been added by TS Home Health Care. The following fields have been updated: Group Dep	Authorization Edit			Hope & Care Providers	PG
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Section		Description
1	Navigation Bar	Navigate between pages within the Report (if applicable), refresh the Report, and export/download it to workstation.
2	Report Summary	(based on selected criteria) Displays the values selected in the filter fields. Above the Summary section, the Report date and pages are displayed.
3	Types of Notes	(Legend) Defines the various types of notes on the report
4	Report Data	Displays the information compiled in the Report.

## Exporting a Report

Step	Action
1	<p>On the Report window, click the <i>Export</i> (disk) icon dropdown menu and select the preferred format to download.</p>  <p style="text-align: center;"><b>Exporting Formats</b></p>
2	<p>Once a format is selected, the system downloads the file to the user's workstation (as illustrated in the image to the right).</p> <p>Click on the file to open the downloaded report.</p>  <p style="text-align: center;"><b>Exported Report</b></p>
3	<p>Depending on the chosen output format, the report opens from the User's workstation.</p>  <p style="text-align: center;"><b>Report Output</b></p>