

# **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								
08/22/2022	General updates								

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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 the HHAX Customer Support Team.

#### **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.
	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the
Caregiver	person providing services.
Provider	Refers to the Agency or organization coordinating services.
	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the
Payer	organization placing Patients with Providers.
ННАХ	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, <i>Report &gt; Other Reports &gt; Patient General Notes</i>							
2	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.							
3	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.							



Step		Action												
	I4 4 I of I ▷ ▷I ↓ Find   Next 💐 • ② 1													
			×н	AeXchange	9		Patient General Notes						Page 1 of 1 09/24/2020 17:54	
				Co	Office(s): H	ope & Care	are Providers Contract(s): All Patient Name: All						2	•
				Pati	From Date: 9/ ent Team(s): A	14/2020								
				Patien	t Branch(es): Al				No	te Status: All				
				Linka	Note Priority: A				Note R	eason(s): All				
				Patient G	eneral Notes: Ye	s			Calend	lar Notes: No				
				Visit Caregive	r Comments: N	<b>,</b>			Missed Vi	sit Notes: No				
													3 General Notes ar Notes Caregiver Comments d Visit Notes	
	Status 🗧 Created 🗘 Created By 🗧				Adm ‡	Patient Name \$	Contract 🛟	Note 4	Reason 🛟	Closed ‡ By	Closed ‡ Date	To Agency 🛟 Type Name of	•	
			Closed	09/24/2020 13:35	ddennisupr (Hope & Care Providers)	VNR- 900014	BRYANT DONALD	TS Home Health Care (YNR)	Updated Address & Tel. Number	Communication	ddennisupr (Hope & Care Providers)	09/24/2020	TS Home PG Health Care (VNR)	
			Open	09/22/2020	Ajpath24 (TS Home Health Care)	YNR- 900010	CARNEY WILLIAM	TS Home Health Care (YNR)	Authorization (17557886_AuthT1) has bee edited by T5 Home Health Care. The following fields have been edited. Hourg per	Authorization Edit			Hope & Care PG Providers	
		Patient General Notes: Report Output												
	1.	. Navigation Bar: Navigate between pages within the Report (if applicable), refresh the								resh the				
		Report, and export/download it to workstation.												
	2.	. Report Summary: (based on selected criteria) Displays the values selected in the filter								the filter				
		fields. A	٩pv	ve the	Summ	ary	section, th	ne Re	port date	and pag	ges a	re dis	played.	
	3.	Types o	<b>Fypes of Notes:</b> (Legend) Defines the various types of notes on the report											
	4.	Report	Dat	<b>a:</b> Dis	olays tl	he ir	formatio	n com	npiled in th	he Repo	ort.			

### **Exporting a Report**

Step	Action								
	On the Report window, click the <i>Export</i> (disk) icon dropdown menu and select the preferred								
	format to download.								
1	Id       1       of 1       0       Find   Next       Image         Image       XML file with report data (       CSV (comma delimited)       PDF         Office(s):       Hope & Care Providers       MHTML (web archive)       Excel         Coordinator(s):       All       Excel       TIFF file         Patient Team(s):       All       Word       Word								
	Exporting Formats								
2	Once a format is selected, the system downloads the file to the user's workstation (as								
	illustrated in the image below). Click on the file to open the downloaded report.								



Step	Action									
	Untitled x + - C Treports.hhaexchange.com/HHAReportsML/Reserved.ReportViewerWebCo Trdes x O :									
	Patient General Nopdf									
3	Depending on the chosen output format, the report opens from the User's workstation.									