



# Scheduling Visits Process Guide

Provider User Guide

# Document Revision History

Date	Description of Revision
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## Overview

This process guide covers the **Scheduling** functionality providing instructions and guidance when scheduling and adjusting visits for Patients in the HHAExchange (HHAX) system. There are two visit classifications in HHAX: **Skilled** and **Non-Skilled**.


**Skilled Visits** (clinical) involve care by a licensed medical professional (such as a Nurse or Physical Therapist). **Non-Skilled Visits** involve assistance with daily routines, grooming, and general support.

The following three options are available to create a new visit (Skilled or Non-Skilled):

- Manually entering the new visit on the Patient’s or Caregiver’s **Calendar** page
- Using the **Copy and Create** function on the Patient’s or Caregiver’s **Calendar** page.
- Creating a **Master Week**.

Once a visit is saved, the system automatically performs a series of validations and authorization checks to ensure that the scheduled visit does not breach any Agency rules or contractual obligations.

Because each Patient may have unique services or scheduling requirements, HHAX recommends that scheduling is performed from the Patient’s *Calendar* page. Furthermore, scheduled visits on the Patient’s *Calendar* displaying in Pink indicates not adhering to contractual authorization.



Please direct any questions, thoughts, or concerns regarding the content herein to [HHAX Support Team](#).

### HHAX System Key Terms and Definitions

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

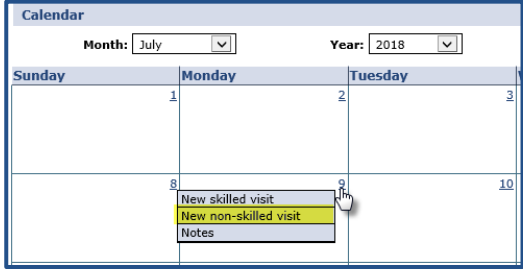
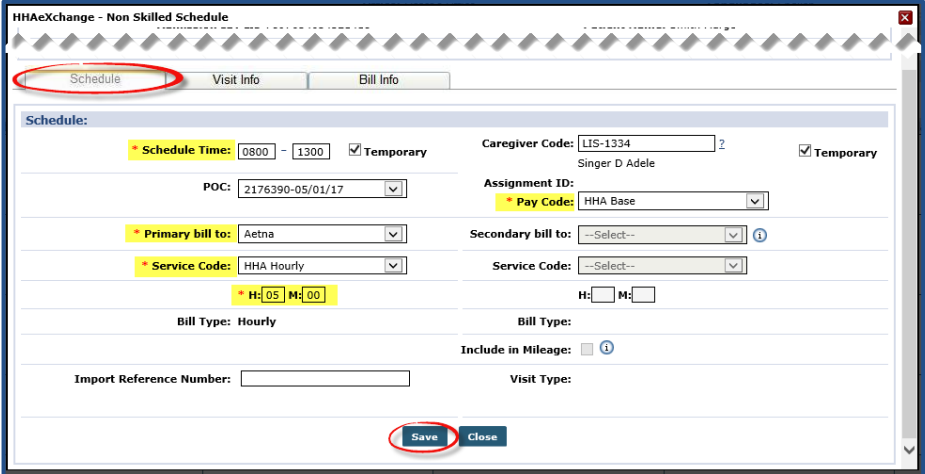
Term	Definition
<b>Patient</b>	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
<b>Caregiver</b>	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
<b>Provider</b>	Refers to the Agency or organization 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

# Creating Visits

This section provides a high-level instruction on how to schedule visits using the Patient **Calendar**, as well as scheduling using the **Master Week** function.

## Non-Skilled Visits

Non-clinical visits in the system are classified as **Non-Skilled**, meaning only non-skilled disciplines can be assigned to them. Follow the steps below to create a non-skilled visit.

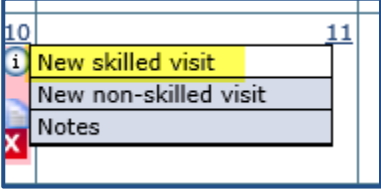
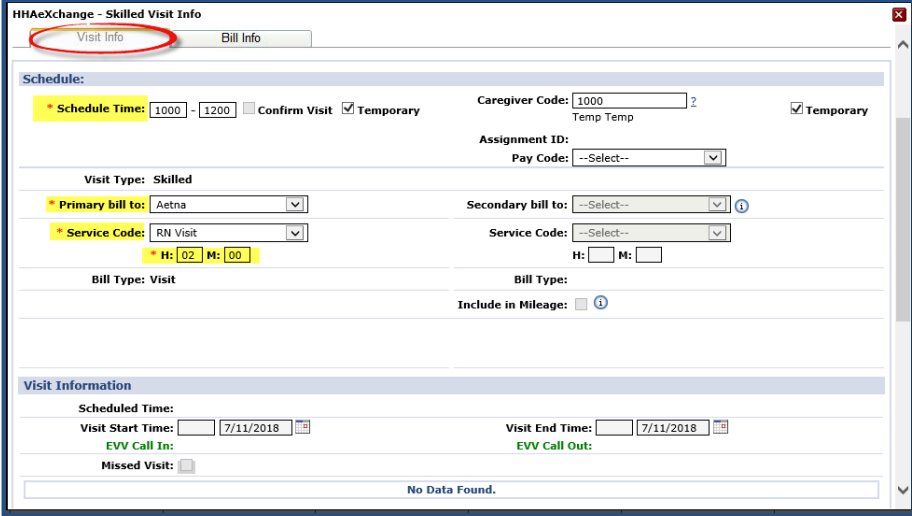
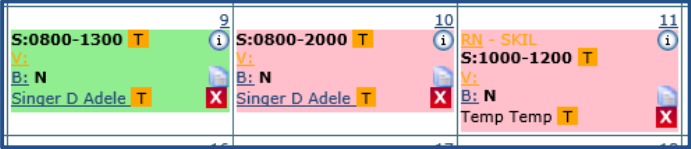
Step	Action
1	Navigate to the desired Patient and click the <b>Calendar</b> page on the Index.
2	<p>Click on the <a href="#">date number</a> (hyperlink) at the top-right of the Calendar cell and select “<b>New non-skilled visit</b>” from the options.</p>  <p style="text-align: center;"><b>Creating a Non-Skilled Visit</b></p>
3	<p>The <i>Non-Skilled Schedule</i> window opens on the visit <i>Schedule</i> tab. Complete the required fields (denoted with a red asterisk).</p> <p><b>Note:</b> If a Caregiver is marked as <b>Absent</b>, has a <b>Restriction</b> for the select Contract, or is scheduled for an <b>In Service</b> on the date of the visit, the system issues a warning either requesting confirmation or stating that the selected Caregiver cannot be scheduled.</p>  <p style="text-align: center;"><b>Schedule Visit tab – Scheduling a Non-Skilled Visit</b></p> <p><b>Note:</b> The <b>Visit Info</b> and <b>Bill Info</b> tabs are used to review visit information <u>after</u> the visit has been completed and billed.</p>
4	Click the <b>Save</b> button to schedule.

Step	Action
5	<p>Once saved, the system automatically performs a series of validation and authorization checks to ensure any Agency rules or contractual obligations are not breached. If a validation error is detected, then the system warns or restricts one from saving the visit.</p> <p>Visits displayed in green are within Authorization parameters, while those in pink indicate an Authorization issue, as illustrated in the image.</p> <div data-bbox="773 407 1438 590" data-label="Image"> </div> <p style="text-align: center;"><b>Scheduled Visits</b></p> <p><b>Note:</b> The system only reviews visits in a 14-day block based on the current date. Visits outside of this range display in white.</p>

Visits scheduled with a **Service Code** that is not covered by the Authorization, or setup to bypass Prebilling validations also display in white, even if within the 14-day block. Consult with an Administrator to discuss which **Service Codes** the Agency has authorized to skip Prebilling validations.

## Skilled Visits

**Skilled Visits** (Clinical) are those involving medical services and only skilled disciplines (such as Nurses or Physical Therapists) can be assigned to them. Follow the steps below to create a Skilled Visit.

Step	Action
1	Navigate to the desired Patient and click the <b>Calendar</b> page on the Index.
2	<p>Click on the <a href="#">date number</a> (hyperlink) at the top-right of the Calendar cell and select “<b>New skilled visit</b>” from the options.</p>  <p style="text-align: center;"><b>Creating a Skilled Visit</b></p>
3	<p>The <i>Skilled Schedule</i> window opens on the visit <i>Schedule</i> tab. Complete the required fields (denoted with a red asterisk).</p>  <p style="text-align: center;"><b>Schedule Visit tab – Scheduling a Skilled Visit</b></p>
4	Click the <b>Save</b> button to schedule.
5	<p>Once saved, the system automatically performs a series of validation and authorization checks to ensure any Agency rules or contractual obligations are not breached. If a validation error is detected, then the system warns or restricts one from saving the visit.</p> <p>Visits displayed in green are within Authorization parameters, while those in pink indicate an Authorization issue, as illustrated in the image.</p>  <p style="text-align: center;"><b>Scheduled Visits</b></p> <p><b>Note:</b> The system only reviews visits in a 14-day block based on the current date. visits outside of this range display in white.</p>

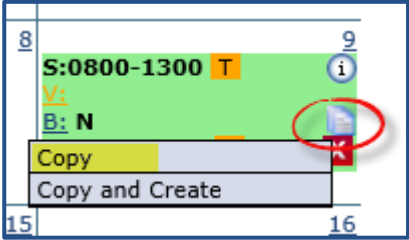
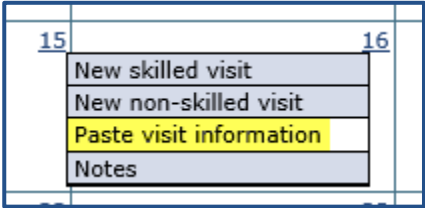
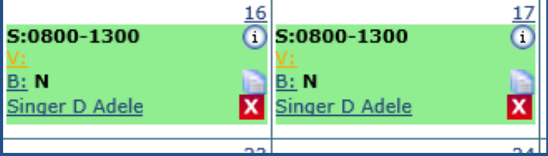
## Copy and Create Tool

Use the **Copy and Create** function to apply new visits to the Calendar in two different ways:

- Select **Copy** to duplicate visit information to a ‘clipboard’. Once copied, apply the visit information to other dates.
- Select **Copy and Create** to copy the visit information. A new window opens to either apply the information to other dates and/or edit the visit information.

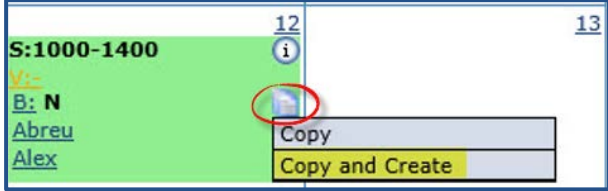
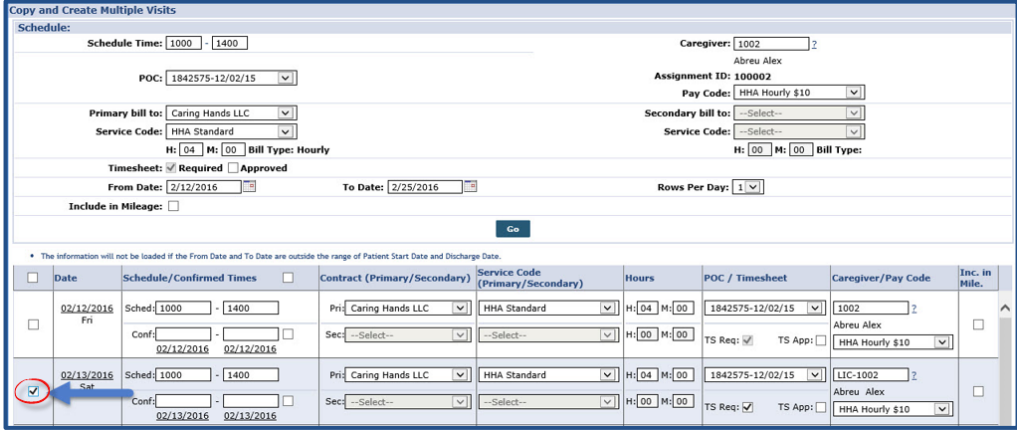
The following tables provide step-by-step instructions on how to use **Copy and Create**.

### Copy a Visit

Step	Action	
1	<p>From the Patient’s <b>Calendar</b> page, click the <b>Copy and Create</b> icon on the right side of the Calendar day cell (as illustrated in the image).</p> <p>Click <b>Copy</b>. The system informs that the visit details have been copied to the clipboard.</p>	 <p style="text-align: center;">Copy Visit</p>
2	<p>Once copied, click on the <a href="#">date number</a> (hyperlink) in the desired Calendar day cell. Select <b>Paste visit information</b> from the options.</p>	 <p style="text-align: center;">Paste Visit Information</p>
3	<p>Upon selecting, the visit details from the first shift are copied to the selected date.</p> <p>The visit details may be applied to multiple dates, as desired.</p> <p><b>Note:</b> Even if a copied visit is authorized, pasting the visit information on a day that is not covered by the Authorization results in an Unauthorized visit (displays in pink).</p>	 <p style="text-align: center;">Copied Visits</p>



Copy and Create Multiple Visits

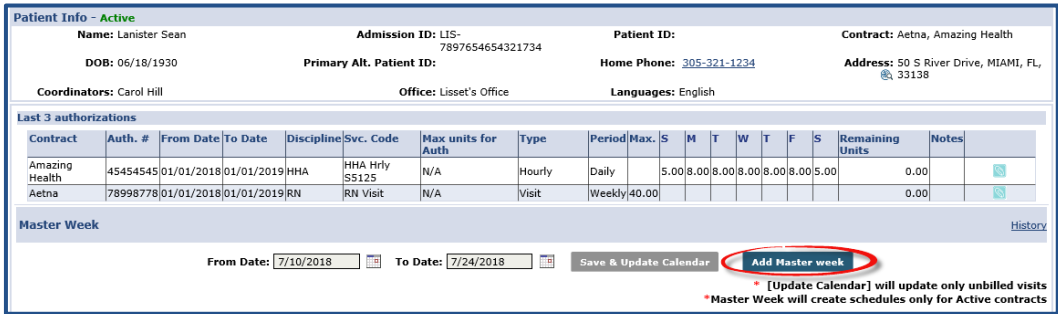
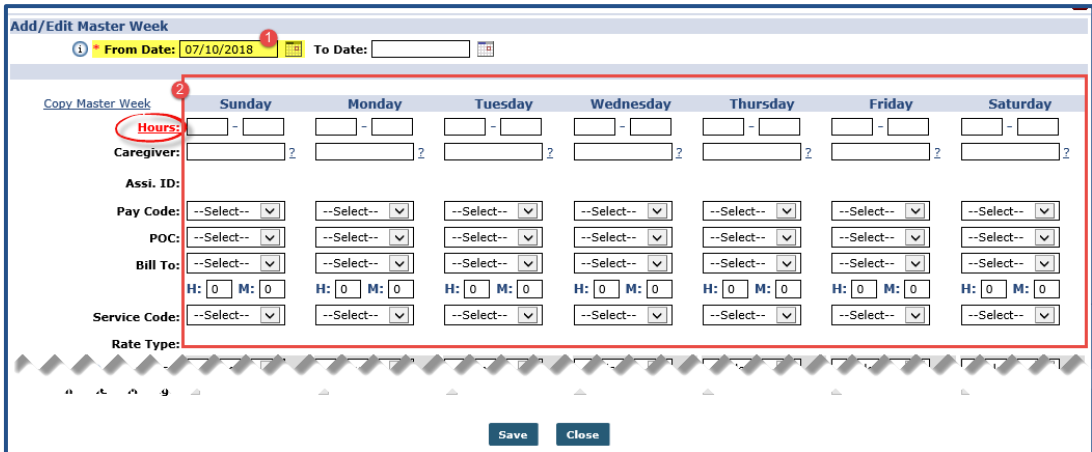
Step	Action	
1	<p>From the Patient's <b>Calendar</b> page, click the <b>Copy and Create</b> icon on the right side of the Calendar day cell (as illustrated in the image).</p> <p>Click <b>Copy and Create</b>. The system informs that the visit details have been copied to the clipboard.</p>	 <p style="text-align: center;"><b>Copy and Create Visit</b></p>
2	<p>The <i>Copy and Create Multiple Visits</i> page opens. Select the checkboxes in the right column to copy the visit information to multiple days. Visit information may also be edited for each day it is applied to.</p>	 <p style="text-align: center;"><b>Copy and Create Multiple Visits</b></p>
3	<p>Once the visit information has been applied to the selected days, scroll down and click the <b>Save</b> button. Refresh the webpage to see the updated <b>Calendar</b>.</p>	

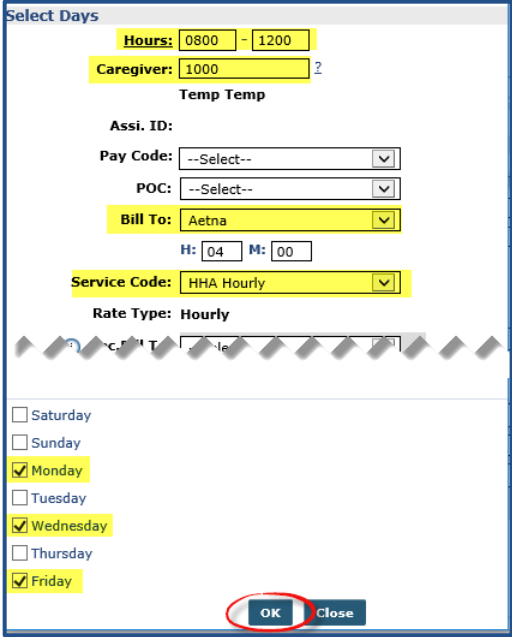
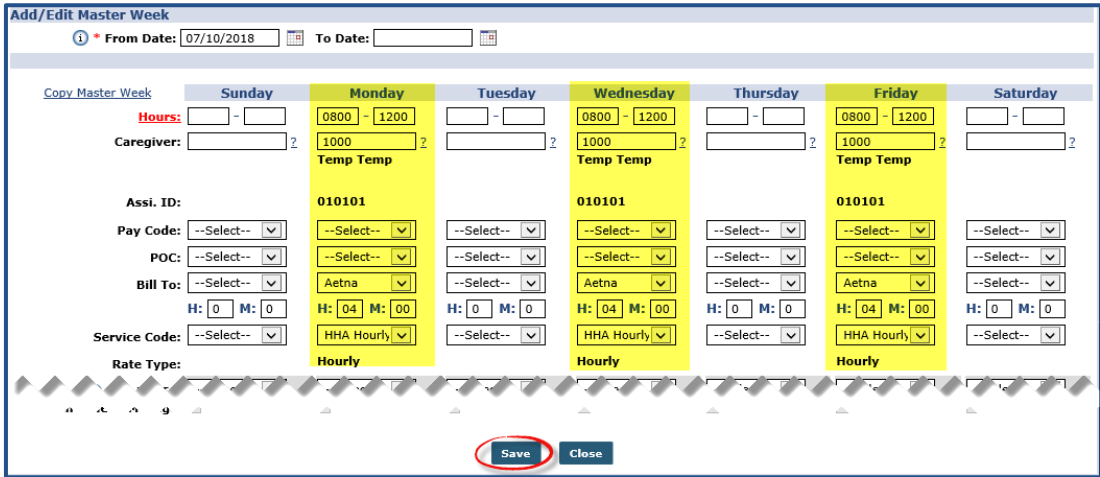
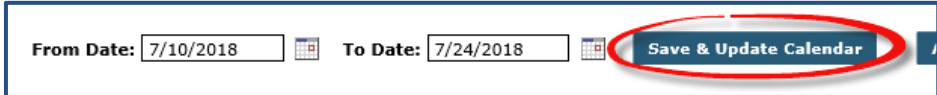
## Setting a Master Week Schedule

The **Master Week** function is used to generate a permanent schedule for a Patient who receives the same service on a regular basis. Once set, the system uses the information in the Master Week to update the Patient’s Calendar every night for 14 days into the future in a process known as “roll over.” Any changes to the Master Week are reflected in future visits when it “rolls over” again.

### Creating a Master Week

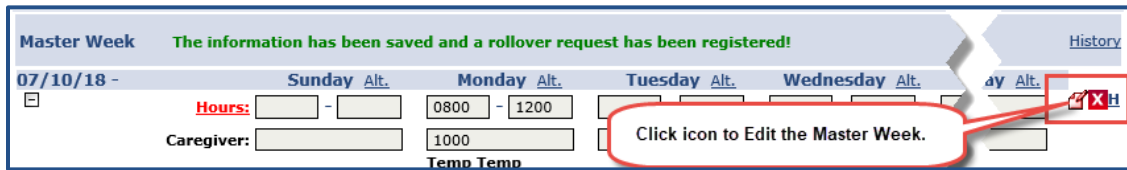
Complete the following steps to create a Master Week.

Step	Action
1	Navigate to the desired Patient and click the <b>Master Week</b> link on the Index.
2	<p>On the Master Week page, click the Add Master Week button.</p>  <p style="text-align: center;"><b>Adding a Master Week</b></p>
3	<p>The <i>Add/Edit Master Week</i> screen opens. Set the Master Week date range in the From/To Date fields. The <b>From Date</b> field is required. The <b>To Date</b> field is optional and may be left blank for indefinite stop date. If a <b>To Date</b> is entered, the system does not generate visits from this Master Week past that date.</p> <p>Enter the visit details for each Master Weekday <b>OR</b> click the <a href="#">Hours</a> (hyperlink) for a streamlined version of this window (next step).</p>  <p style="text-align: center;"><b>Creating a Master Week</b></p>

Step	Action
4	<p>The <i>Select Days</i> window opens allowing one to set visit details and apply them to different days by selecting the corresponding checkbox, as illustrated in the image.</p> <p>Click the <b>OK</b> button to continue (return to the Add/Edit Master week window).</p>  <p style="text-align: center;"><b>Set Visit Details using Hours Link</b></p>
5	<p>On the Add/Edit Master Week window, the selected days and visit details are displayed. Click the <b>Save</b> button to finalize the Master Week.</p>  <p style="text-align: center;"><b>Save the Master Week</b></p>
6	<p>At the bottom of the page, click the <b>Save &amp; Update Calendar</b> button to “roll over” visits onto the Calendar based on the Master Week details.</p>  <p style="text-align: center;"><b>Save &amp; Update Calendar with Master Week</b></p>

## Editing/Deleting a Master Week

To edit a Master Week, click the **edit** icon, as seen in the image below. To delete a Mater Week, click the red **X** icon to the right of the edit icon.



Edit/Delete Master Week

By default, the system rolls over the Master Week for the 14-day range in the **From** and **To Date** fields. If desired, adjust the date range and roll over Master Week details to other date ranges.

Note that a Master Week does not rollover if a Patient's Authorizations do not cover the future dates.

## Multiple Master Weeks

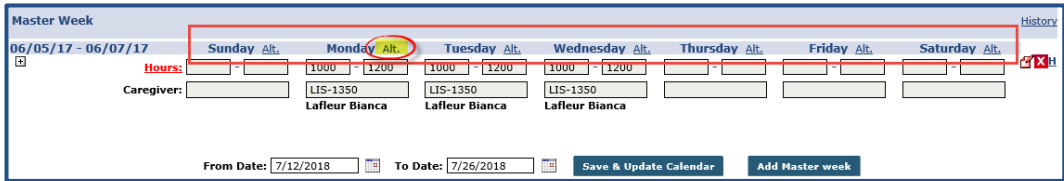
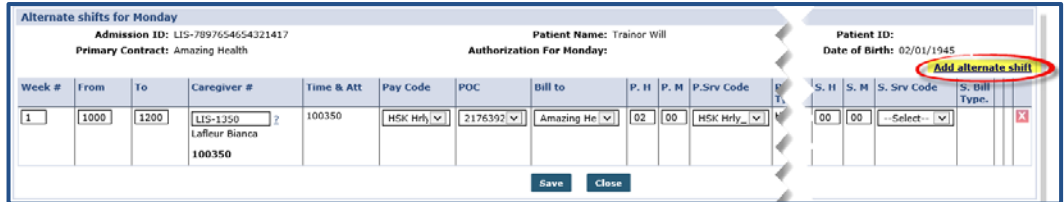
If visit times and date ranges do not overlap, one can enter multiple Master Weeks for a Patient. These are common in the following special scenarios:

- **The Patient has multiple shifts on the same day.** If the Patient consistently receives service in the morning and then again in the evening, one can add one Master Week for the morning shift and another for the evening shift.
- **The Patient has “tapered” service.** If the Patient’s schedule changes on a set basis: for example, the Patient receives 5 visits per week for one month, then 4 visits per week the next month, then 3 visits per week the following month. In this scenario, enter one Master Week with a date range for the first month, a second for the next date range, and a third for the final date range.

## Master Week Alternate Shifts

For some permanent schedules, aspects of the schedule alternate from week to week. For example, every other Sunday a different Caregiver might work, or every third week the Patient requests services in the afternoon instead of the morning. In these scenarios, an Agency can set an **Alternate Master Week** schedule. Once set, the Master Week rollover alternates back and forth based on what is set here.

Complete the following steps to create an Alternative Shift.

Step	Action
1	Navigate to the desired Patient and click the <b>Master Week</b> link on the Index.
2	<p>On the Master Week page, each weekday has an <a href="#">Alt.</a> link. Click on the applicable <a href="#">Alt.</a> link.</p>  <p style="text-align: center;"><b>Alt. Master Week Link</b></p>
3	<p>The Alternative Shifts window opens for the selected day displaying the visit details. Click the <a href="#">Add Alternate Shift</a> link to add an alternate record.</p>  <p style="text-align: center;"><b>Alternate Shifts Master Week Window</b></p>

Step	Action												
4	<p>The <i>Add Alternative Masterweek Shift</i> window opens.</p> <p>Make the necessary additions for the selected day.</p> <p>Click the <b>Save</b> button to finalize.</p> <div data-bbox="972 256 1398 630" style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center; margin: 0;"><b>Add Alternate Masterweek Shift for Monday</b></p> <p><b>Hours:</b> <input type="text" value="1400"/> - <input type="text" value="1600"/></p> <p><b>Caregiver:</b> <input type="text" value="LIS-1350"/> 2 Lafleur Bianca</p> <p><b>Assi. ID:</b> <input type="text" value=""/></p> <p><b>Pay Code:</b> <input type="text" value="HSK Hrly"/></p> <p><b>POC:</b> <input type="text" value="2176392"/></p> <p><b>Bill To:</b> <input type="text" value="Amazing Health"/></p> <p><b>H:</b> <input type="text" value="02"/> <b>M:</b> <input type="text" value="00"/></p> <p><b>Service Code:</b> <input type="text" value="HSK Hrly_ANT"/></p> <p><b>Rate Type:</b> Hourly</p> <p style="text-align: right;"><input type="button" value="Save"/> <input type="button" value="Close"/></p> </div> <p style="text-align: center; margin-top: 5px;"><b>Alternative Shift</b></p>												
5	<p>Once saved, the Alternative Shift displays on the Master Week header in red, as illustrated in the image below.</p> <div data-bbox="456 768 1281 978" style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <p><b>Master Week</b></p> <p><b>06/05/17 - 06/07/17</b></p> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"></td> <td style="width: 33%; text-align: center;"><b>Sunday Alt.</b></td> <td style="width: 33%; text-align: center;"><b>Monday Alt. (2)</b></td> </tr> <tr> <td><b>Hours:</b> <input type="text"/> - <input type="text"/></td> <td style="text-align: center;">1000 - 1200</td> <td style="text-align: center;">1000 - 1200</td> </tr> <tr> <td><b>Caregiver:</b> <input type="text"/></td> <td style="text-align: center;">LIS-1350</td> <td style="text-align: center;">LIS-1350</td> </tr> <tr> <td></td> <td style="text-align: center;"><b>Lafleur Bianca</b></td> <td style="text-align: center;"><b>Lafleur Bianca</b></td> </tr> </table> </div> <p style="text-align: center; margin-top: 5px;"><b>Alternative Shift Entered</b></p> <p>When rolling over the Master Week, the system works through each alternate shift entered and places those visits on the Calendar.</p>		<b>Sunday Alt.</b>	<b>Monday Alt. (2)</b>	<b>Hours:</b> <input type="text"/> - <input type="text"/>	1000 - 1200	1000 - 1200	<b>Caregiver:</b> <input type="text"/>	LIS-1350	LIS-1350		<b>Lafleur Bianca</b>	<b>Lafleur Bianca</b>
	<b>Sunday Alt.</b>	<b>Monday Alt. (2)</b>											
<b>Hours:</b> <input type="text"/> - <input type="text"/>	1000 - 1200	1000 - 1200											
<b>Caregiver:</b> <input type="text"/>	LIS-1350	LIS-1350											
	<b>Lafleur Bianca</b>	<b>Lafleur Bianca</b>											

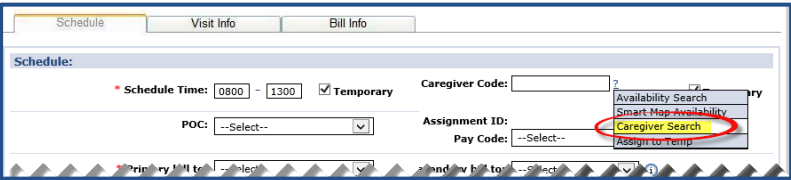
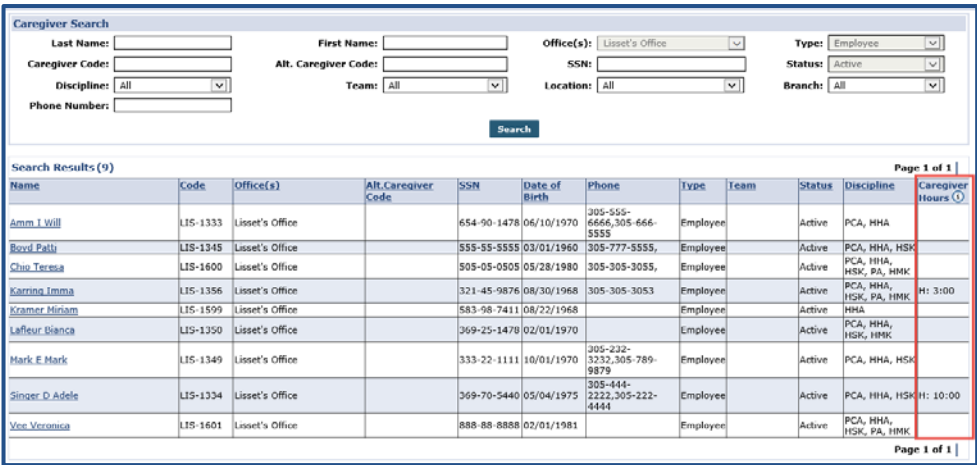
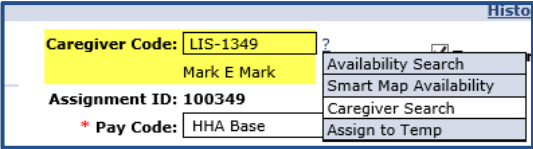
# Selecting a Caregiver

There are two options on the Provider Portal to assign a Caregiver to a visit: *Caregiver Search* or *Assign to Temp*. This section covers how to use these options to search and assign a Caregiver.

**Note:** *Caregiver Search* option availability varies depending on the Provider platform.

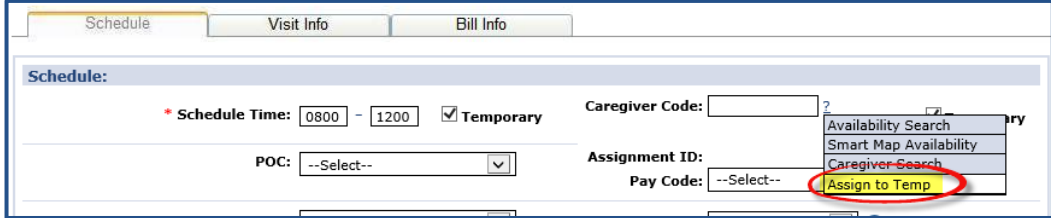
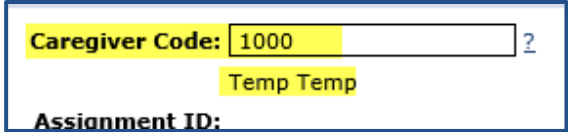
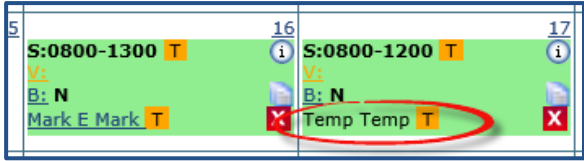
## Caregiver Search

Use the **Caregiver Search** function to search for a specific Caregiver using search filters (such as **Discipline, Team, and Location**). Complete the following steps to perform a *Caregiver Search* when scheduling a visit.

Step	Action
1	<p>On the <i>Schedule</i> tab, click on the <a href="#">?</a> hyperlink to the right of the <b>Caregiver Code</b> field.</p> <p>Select the <b>Caregiver Search</b> option.</p>  <p style="text-align: center;"><b>Caregiver Search Option – Visit Schedule</b></p>
2	<p>The <i>Caregiver Search</i> window opens. Enter values in the filters to generate a search.</p> <p>The Search Results return Caregivers based on the filter selections. Once located, click on the <a href="#">Caregiver Name</a> (hyperlink) to assign the shift.</p>  <p style="text-align: center;"><b>Caregiver Search Function</b></p> <p><b>Note:</b> The <i>Caregiver Hours</i> show the number of hours a Caregiver is already scheduled for the week. This total displays in red if over 40 hours, in orange if over 30 hours, and in black for any amount under 30.</p>
4	<p>The selected Caregiver populates on the <i>Visit</i> tab in the Caregiver Code field (as illustrated in the image).</p>  <p style="text-align: center;"><b>Assigned Caregiver</b></p>

## Assign to TEMP

If a Caregiver is not available to assign or unknown when scheduling a visit, select the **Assign to TEMP** option to place a temporary placeholder to save the visit.

Step	Action
1	<p>On the Schedule tab, click the <a href="#">?</a> hyperlink and select the <b>Assign to Temp</b> option.</p>  <p style="text-align: center;"><b>Assign to Temp Option – Visit Schedule</b></p>
2	<p>The <b>Caregiver Code</b> field is populated by the Temp Code (with the Temp name), as seen in the image.</p>  <p><b>Note:</b> One can also manually enter 1000 or Temp in the <b>Caregiver Code</b> field to assign a temporary placeholder to the visit.</p>
3	<p>Once saved, the visit displays with a Temp Caregiver on the <b>Calendar</b> page (as seen in the image).</p>  <p style="text-align: center;"><b>Temp Caregiver Assigned to Visit</b></p>
4	<p>Once an actual Caregiver is found, revise the visit and replace the TEMP Caregiver with the “actual” Caregiver.</p>

To see a list of all visits with assigned TEMP Caregivers, navigate to **Visit > Visit Search** and select **Search Open Schedules** field (as seen in the image).

<b>Caregiver Branch:</b> All	<b>Search Open Schedules:</b> <input checked="" type="checkbox"/>	<b>Search</b>			
<b>Search Results</b> <b>Total Visits : 9</b> <b>Total Call In : 0</b> <b>Total Call Out : 0</b>					
Coordinators	Admission.ID	Patient Name	Caregiver Code	Caregiver Name	Assignment ID
Reggie Love	<a href="#">900014</a>	<a href="#">Smith Rachel</a>			010101
Susan Robee	<a href="#">900013</a>	<a href="#">Anderson Melissa</a>			010101

### Visits with Temp Caregivers

**Note:** If the **Caregiver Code** field is not updated by the time of the visit, EVVs placed by the Caregiver do not sync to the visit. As a result, the visit is held on the **Prebilling Exception** page until the calls are linked to the visit and a user manually enters a real Caregiver in the **Caregiver Code** field.