



System Introduction Process Guide

Provider User Guide

Document Revision History

Date	Description of Revision
09/24/2020	Initial version of the document
03/08/2021	Accessibility standards applied

Table of Contents

- Overview..... 1
- System Login and User Interface 2
- The Navigation Panel..... 4
- HHAeXchange Nomenclature..... 5
- Support Center Documentation 6

Overview

The HHAeXchange (HHAX) **Provider Portal** platform offers a suite of functions and features facilitating the homecare exchange process that connects Providers, Payers, Patients, and Caregivers under one umbrella.

With HHAeXchange, Agencies can manage their business with an integrated solution, including the ability to:

- manage Agency demographics and system settings;
- perform Patient intake functionality;
- enter Caregiver data;
- schedule Patients and Caregivers visits;
- confirm visits via EVV through a variety of methods (including IVR and a GPS-enabled Caregiver Mobile Application); and
- invoice, bill, and track the utilization of authorizations.

This process guide provides a high-level overview of the basic components and user interface of the *Provider Portal*, to include:

- how to Log In to the system,
- navigation of the system Modules;
- HHAX nomenclature and keyword configuration, and
- access to documentation and resources via the Support Center.

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

HHAX System Key Terms and Definitions

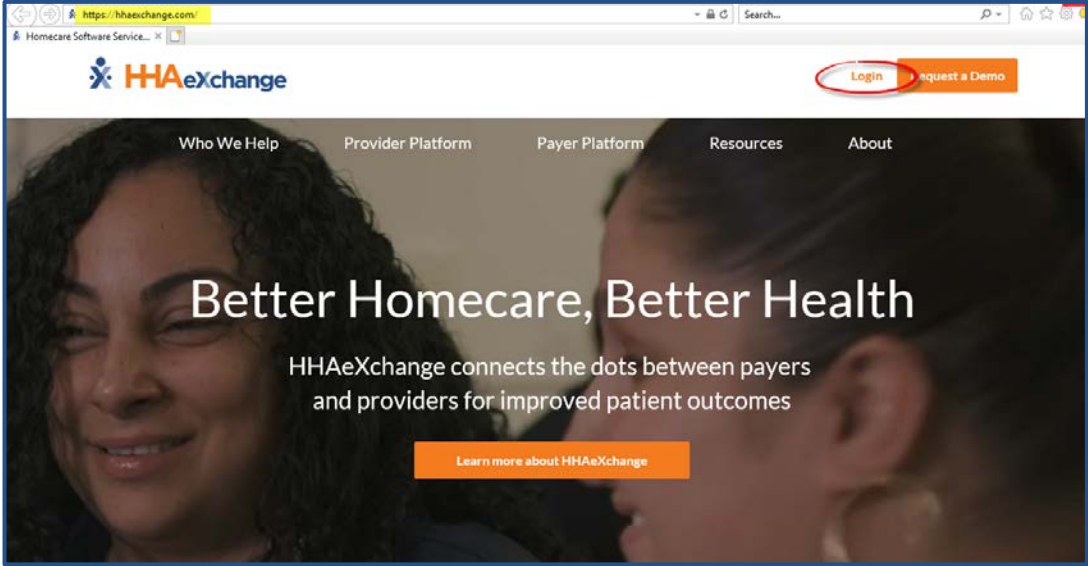
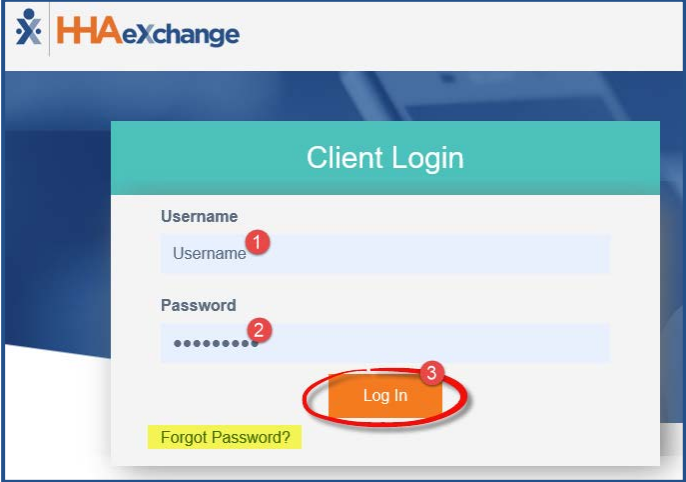
The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
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

System Login and User Interface

All HHAX platforms are web-based applications requiring an internet connection to access the system. Any disruptions to internet service ends a user’s session, as the HHAX Provider Portal platform does not support an “offline” mode. Additionally, if the system does not detect any activity for 20 minutes, the user is logged off for security purposes.

The following table provides instructions on how to access HHAX systems.

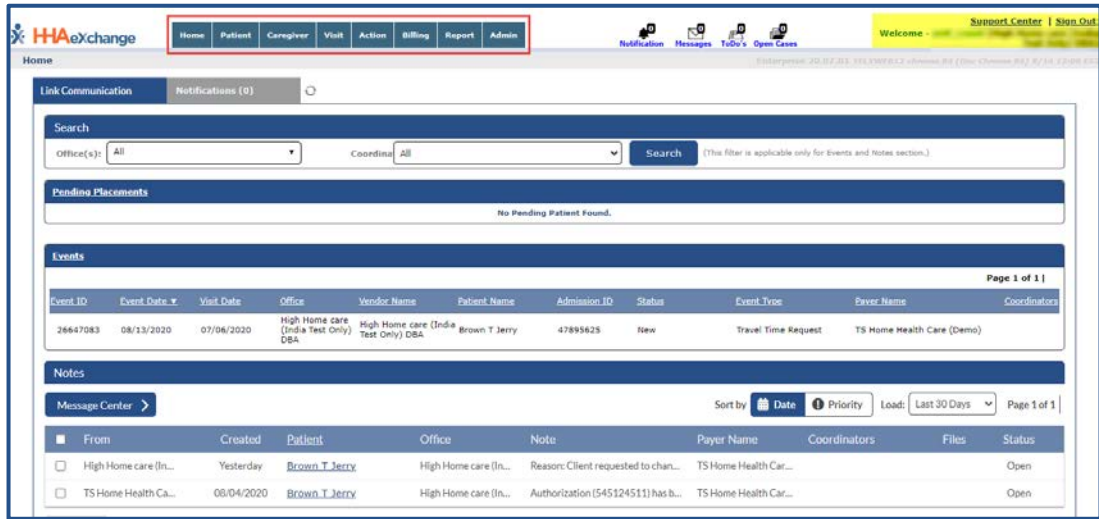
Step	Action
1	Open Internet Explorer and navigate to https://hhaexchange.com
2	<p>On the HHAX homepage, click the Login link.</p>  <p style="text-align: center;">HHAExchange.com</p>
3	<p>At the login window, enter user credentials as shown in the image below and click the Log In button.</p> <p>Note: Click on the Forgot Password? link and follow system prompts to reset your password. Refer to the Self-Service Password Reset Job Aid for further details.</p>  <p style="text-align: center;">Client Login Window</p>

Step	Action
------	--------

The system opens to the **Home** module, *Link Communication* tab. The *Link Communication* tab serves as a communication dashboard for correspondence between Payers and Providers who service Linked Contract Patients. Refer to the [Communications \(Linked Contracts\) Process Guide](#) for full details and instructions. The *Notifications* tab displays the recent System Notifications issued by HHAX.

The top panel is static* containing the **Navigation Panel** in the center and links to the **Support Center** and **Logout** to the right. User details are also indicated underneath the links along with the system environment in which the user is currently logged into.

4

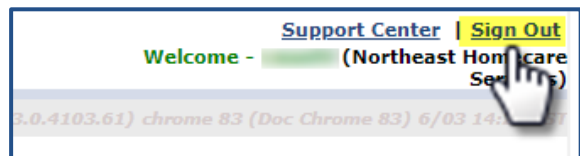


Navigation Panel and User Info, Highlighted in Yellow

*These items remain permanent at the top of the screen regardless of where the user navigates in the system; allowing for easy navigation between modules and access to HHAX Support.

5

To log out of the system, click the [Sign Out](#) link.



Sign Out Link

The Navigation Panel

The **Navigation Panel** allows users to navigate between the different sections, or **Modules**, within the system (as illustrated below).



The Navigation Panel

The full navigation panel contains eight modules which are all permission based according to assigned User role; meaning, Providers can assign access to users in specific modules. For example, a Collections employee handling invoicing visits may not need access to the **Admin** modules; therefore, the permission to access Admin functions may be deactivated.

The following table offers a high-level summary of the actions available through each module.

Module	Description
Home	Home page where users can access internal communication tools.
Patient	Allows users to manage Patients and schedule visits.
Caregiver	Allows users to create and manage Caregivers, as well as assign them to visits.
Visit	Users can search for scheduled visits and manage visits.
Action	Contains an assortment of functions such as searching for Pending Placements, Confirming Visits, and Payer Communications.
Billing	Allows users to handle all aspects of the billing process.
Report	Allows Providers to run reports based on specified filters and compile specific information into documents that may be saved outside of the software.
Admin	Allows users to manage key components of the system such as User Management, Agency Setup, and Reference Table Management, among many others.

HHAeXchange Nomenclature

HHAeXchange uses a standardized nomenclature across all systems. As a result, some of the names or designations used in the system and end user documentation may differ across implementations (projects).

The following keywords appear in the documentation by default.

Patient	<p>The person receiving services. Other keywords for “Patient” include:</p> <ul style="list-style-type: none"> ○ Member ○ Consumer ○ Recipient
Caregiver	<p>The person providing services. A Caregiver may be categorized as a Non-Skilled (Home Health Aides) or Skilled (Occupational Therapists) service provider. Other keywords for “Caregiver” include:</p> <ul style="list-style-type: none"> ○ Aide ○ Homecare Aide ○ Homecare Worker ○ Worker
Provider	<p>The organization offering services. Other keywords for “Provider” include:</p> <ul style="list-style-type: none"> ○ Vendor ○ Agency
Coordinator	<p>The person managing the Patient’s case. Other keywords for “Coordinator” include:</p> <ul style="list-style-type: none"> ○ Care Coordinator ○ Case Coordinator ○ Service Coordinator
Payer	<p>The organization placing Patients with Providers. Other keywords for “Payer” include:</p> <ul style="list-style-type: none"> ○ Contract ○ HHS ○ MCO

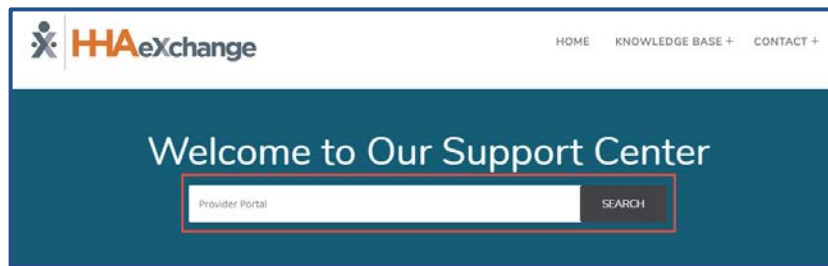
Support Center Documentation

A library of information is available via the Support Center. The Support Center includes Release Notes, Process Guides, Job Aids, Videos, and additional Reference materials providing instruction and guidance on specific functionality. To access the **Support Center**, click on the [Support Center](#) link in the top-right corner (as pictured below).



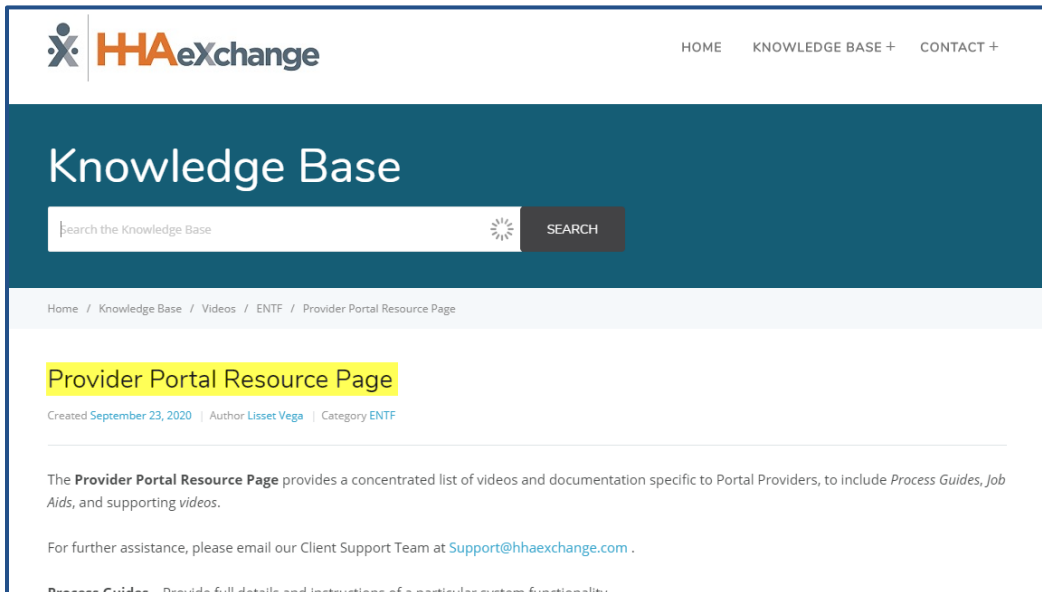
Support Center Link

On the Support Center landing page, enter the *Payer Name* or *specific market* in the **Search** field to locate the *Provider Portal Resource Page*.



Support Center Landing Page

The *Provider Portal Resource Page* provides access to documentation such as Process Guides, Job Aids, and Videos specific to the Provider Portal.



Support Center: Provider Portal Resource Page