



Appointments Process Guide

Using the Appointments Function

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Appointments Function

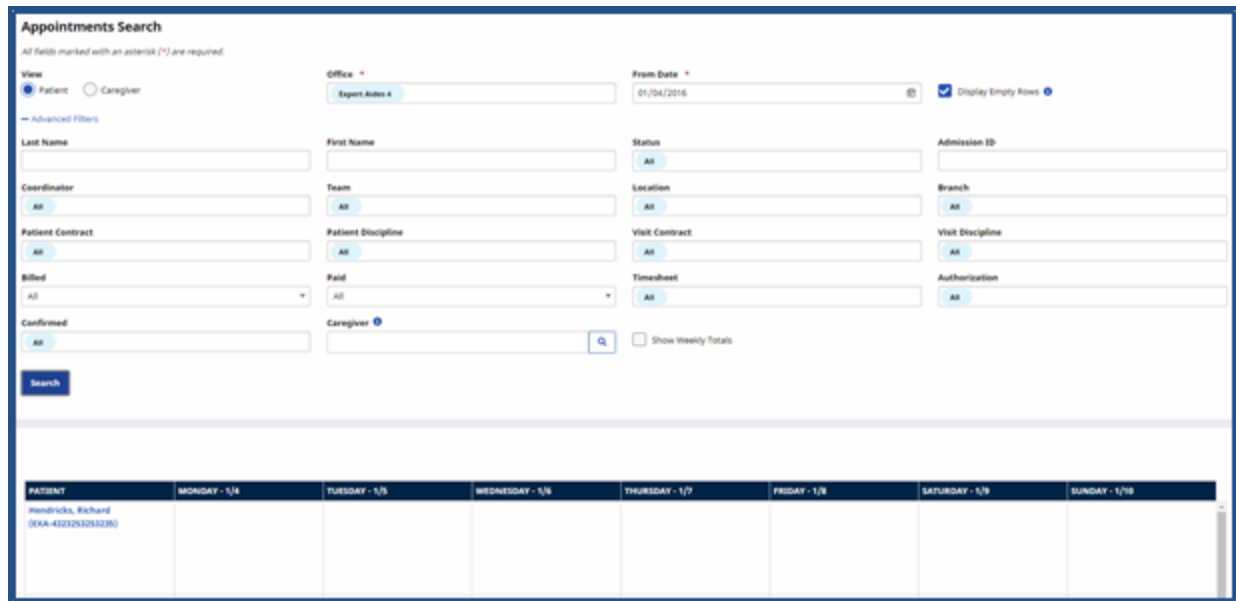
Overview

The **Appointments** function is a robust scheduling and confirmation tool providing an alternative means to review, edit, confirm, and schedule new visits. This category provides guidance and instructions on the **Appointments** functionality in the HHAeXchange (HHAX) system.

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

The Appointments Function

Navigate to **Visit > Appointments** to access the **Appointments** function.



Appointments Search
All fields marked with an asterisk (*) are required.

View: ☒ Patient ☐ Caregiver

Office *: Expert Aides 4

From Date *: 01/04/2016

☒ Display Empty Rows

Advanced Filters:

Last Name:

First Name:

Status: All

Admission ID:

Coordinator: All

Team: All

Location: All

Branch: All

Patient Contract: All

Patient Discipline: All

Visit Contract: All

Visit Discipline: All

Billed: All

Paid: All

Timesheet: All

Authorization: All

Confirmed: All

Caregiver:

☐ Show Weekly Totals

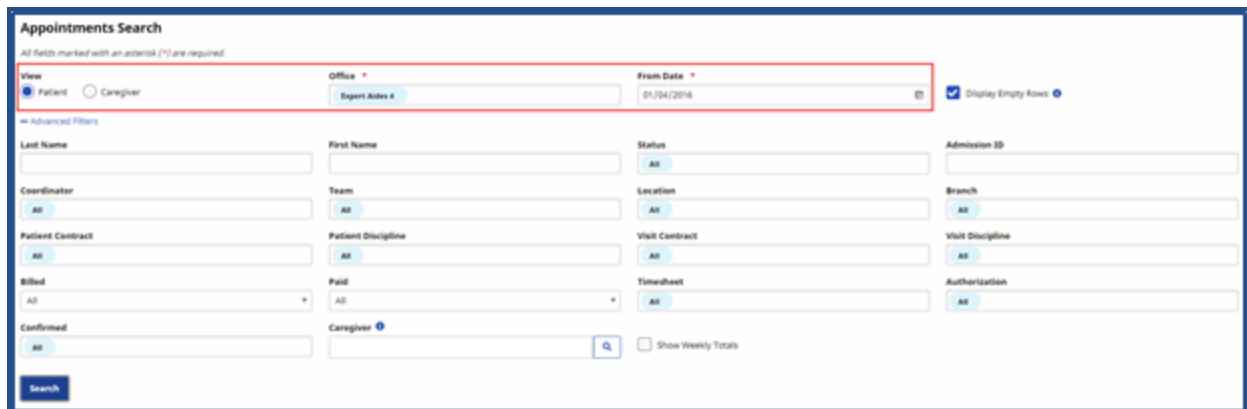
Search

PATIENT	MONDAY - 1/4	TUESDAY - 1/5	WEDNESDAY - 1/6	THURSDAY - 1/7	FRIDAY - 1/8	SATURDAY - 1/9	SUNDAY - 1/10
Hendricks, Richard (DEKA-4523251253235)							

The Appointments Function

Searching for Visits

To search for a visit, specify the **View By** option of either *Patient* or *Caregiver* and select the required **Office** and **From Date** fields (denoted with red asterisks). Use other available search filters to narrow searches to specific information.



Appointments Search
All fields marked with an asterisk (*) are required.

View: ☒ Patient ☐ Caregiver

Office *: Expert Aides 4

From Date *: 01/04/2016

☒ Display Empty Rows

Advanced Filters:

Last Name:

First Name:

Status: All

Admission ID:

Coordinator: All

Team: All

Location: All

Branch: All

Patient Contract: All

Patient Discipline: All

Visit Contract: All

Visit Discipline: All

Billed: All

Paid: All

Timesheet: All

Authorization: All

Confirmed: All

Caregiver:

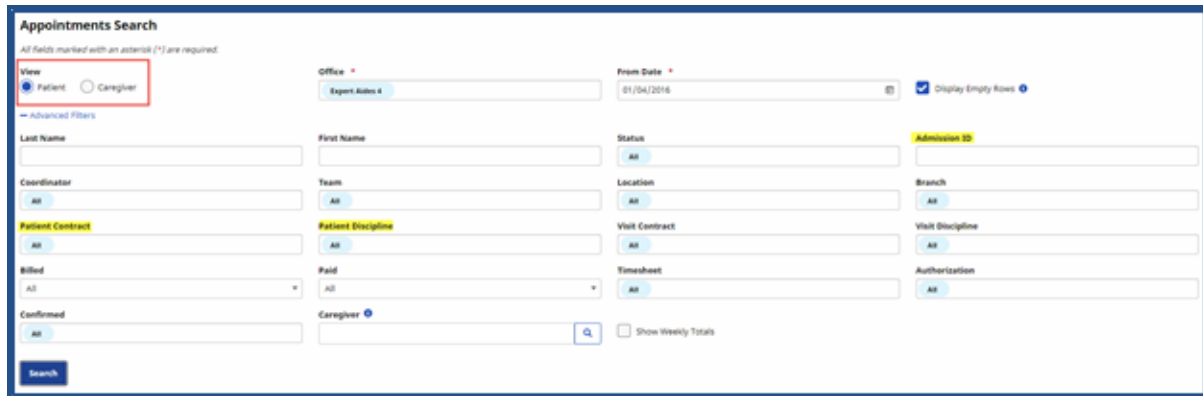
☐ Show Weekly Totals

Search

Appointments Search Fields

The **View By** option serves the primary sorting criteria for the search providing results based on the selection. One can search for the *Patient* receiving the service, or the *Caregiver* assigned to the visit. The selected View By option changes the available filter fields to facilitate precise searches.

For example, if searching by *Patient*, the **Appointments** functionality provides filter fields applicable to Patients, such as: **Patient Contract**, **Patient Discipline**, and **Admission ID**.



Appointments Search
All fields marked with an asterisk (*) are required.

View
☒ Patient ☐ Caregiver

Office *
Expert Aides 4

From Date *
01/04/2016

☒ Display Empty Rows

Advanced Filters

Last Name
[Text Field]

First Name
[Text Field]

Status
All

Admission ID
[Text Field]

Coordinator
All

Team
All

Location
All

Branch
All

Patient Contract
All

Patient Discipline
All

Visit Contract
All

Visit Discipline
All

Billed
All

Paid
All

Timesheet
All

Authorization
All

Confirmed
All

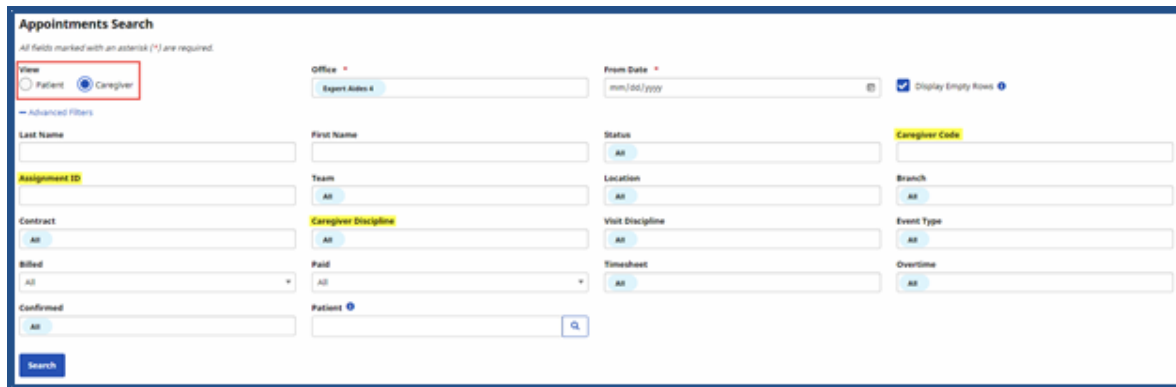
Caregiver
[Text Field]

☐ Show Weekly Totals

Search

Patient Filter Fields

If searching by *Caregiver*, the system replaces Patient specific fields with fields such as **Assignment ID**, **Caregiver Discipline**, and **Caregiver Code**.



Appointments Search
All fields marked with an asterisk (*) are required.

View
☐ Patient ☒ Caregiver

Office *
Expert Aides 4

From Date *
mm/dd/yyyy

☒ Display Empty Rows

Advanced Filters

Last Name
[Text Field]

First Name
[Text Field]

Status
All

Caregiver Code
[Text Field]

Assignment ID
[Text Field]

Team
All

Location
All

Branch
All

Contract
All

Caregiver Discipline
All

Visit Discipline
All

Event Type
All

Billed
All

Paid
All

Timesheet
All

Overtime
All

Confirmed
All

Patient
[Text Field]

☐ Show Weekly Totals

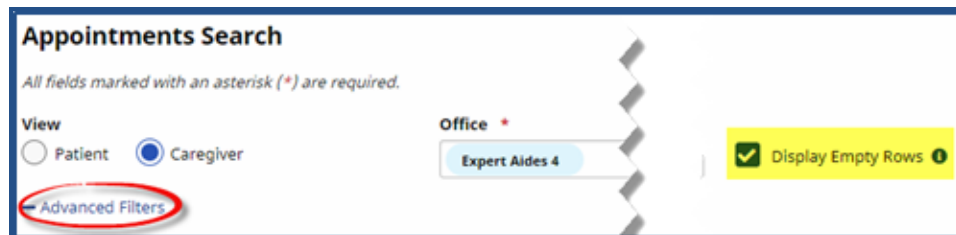
Search

Caregiver Filter Fields

Additional Search Features

The **Display Empty Rows** checkbox is selected by default. With this enabled, the search includes *all Patients* or *Caregivers* (depending on the selected **View By** option) regardless of whether they have any scheduled visits for the selected week. To view only Patients or Caregivers who have scheduled visits, unselect this checkbox.

Once a search is run, click the **Minimize Filters** option (on the bottom-right corner, as illustrated in the image below) to collapse the search filters and expand the page to only show the search results which facilitates the viewing of the information.



Appointments Search
All fields marked with an asterisk (*) are required.

View
☐ Patient ☒ Caregiver

Office *
Expert Aides 4

☒ Display Empty Rows

Advanced Filters

Minimize Filters

Additional Search Features

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 Health and Human Services (HHS). The Payer is the organization that manages patient Medicaid benefits and claims payments.
HHAX	Abbreviation for HHAeXchange.
UPR	Acronym for Universal Patient Record (Linked Contract Patient)

HHAX Texas Terms and Definitions

The following table lists terms used in the HHAExchange system and cross references them to terms and definitions used in EVV policy in Texas.

**Terms marked with an asterisk can be configured in the HHAX system.*

HHAX Term	Texas Term	Definition
Billable Hours (Adjusted Hours)	Bill Hours	The EVV system calculates Bill Hours by subtracting the Bill Time In from Bill Time Out and rounding to the nearest quarter hour increment. Bill Hours represents the hours to be billed
*Caregiver	Service Provider or Consumer Directed Services (CDS) Employee	Service Provider: Person who provides an EVV service to a Member and is employed by or contracted with a Program Provider. CDS Employee: Person who provides an EVV service to a Member and is employed by a CDS Employer.
Confirmed Visit	EVV Visit Transaction	Record generated by an EVV system that contains data elements for an EVV visit. Data elements include service authorization data, member data, service provider data, program provider or FMSA data, and EVV service delivery data.
--	Consumer Directed Ser- vices (CDS) Employer	Member or legally authorized representative (LAR) who chooses to participate in the CDS option and is responsible for hiring and retaining a service provider to deliver a Medi- caid service.
Duty	Task	Activities of Daily Living that can be recorded as having been performed or refused during a visit.
EVV Call In	EVV Clock In	Time captured by the EVV system from the electronic verification method (home phone landline, alternative methods/devices, mobile method) that the service provider used to indicate the beginning of a service delivery visit.
EVV Call Out	EVV Clock Out	Time captured by the EVV system from the electronic verification method (home phone landline, alternative methods/devices, mobile method) that the service provider used to indicate the end of a service delivery visit.
Fixed Object (FOB)	Alternative Device	An HHSC-approved electronic device that allows a service provider or CDS employee to clock in and clock out of the EVV system from the member's home.
HHAX	HHAExchange	Acronym for HHAExchange.
Manual Visit Confirmation	Manually Entered Visit	A visit transaction manually entered into the EVV system when the service provider or CDS employee fails to clock in

HHAX Term	Texas Term	Definition
		or out of the EVV system or an HHSC-approved clock in or clock out method is not available.
Mobile Verification	Mobile Method	Clocking in and out of the EVV system in the home or community using an HHAX-provided application on a smart phone or other mobile device with Internet connectivity.
Office	Business Unit/Branch	A separate branch office, under the same or a different National Provider Identifier (NPI), associated with the same Provider Agency.
Passcode	Alternative Device Code or Token number	Code generated by the FOB and entered by the service provider or CDS employee to validate the visit.
*Patient	Member	Person eligible to receive Medicaid services requiring the use of EVV.
Plan Code	Payer Plan Code	Code to identify a specific payer (HHSC or managed care organization)
*Provider/ Agency	Program Provider or Financial Management Services Agency (FMSA)	Program provider: Entity that contracts with HHSC or a managed care organization (MCO) to provide an EVV service. FMSA: Entity that contracts with HHSC or an MCO to provide financial management services to a CDS employer.
New Reason	EVV Reason Code Number and Description	Reason Code Numbers represent the overall issue for the need to complete visit maintenance. Reason Code Descriptions provide more detail about why visit maintenance was completed on an EVV visit transaction. In HHAX, select the Reason Code Number and Description from the New Reason list.
Representative	Designated Representative (DR)	Person designated by the CDS employer (member or Legally Authorized Representative) to assist or perform CDS and EVV responsibilities in the CDS option.
Secondary Identifier	API (Atypical Provider Identifier)	Unique number assigned to a program provider or FMSA instead of a National Provider Identifier (NPI) number. The Centers for Medicare and Medicaid Services (CMS) defines atypical program providers as a program provider or FMSA that does not provide healthcare.
Service Code	Healthcare Common Procedure Coding System (HCPCS) + Modifier	A collection of codes that represent procedures and services provided to individuals, based on the American Medical Association's Current Procedural Terminology (CPT).
Service Location	Service Delivery Location	Location where EVV services were provided. Valid values are Member Home, Family Home, Neighbor Home, and Community.
Shift	Visit	Time elapsed between the time the service provider

HHAX Term	Texas Term	Definition
		clocked in for service delivery using an HHSC-approved method and the time the service provider clocked out for service delivery using an HHSC-approved method.
UPR	---	Universal Patient Record (Linked Contract Patient)
Visit Time In	Bill Time In	Time the service provider clocked in for service delivery using an HHSC-approved clock-in method (auto-populated from the EVV Clock In when present on the visit).
Visit Time Out	Bill Time Out	Time the service provider clocked out for service delivery using an HHSC-approved clock-out method (auto-populated from the EVV Clock Out when present on the visit).

Reviewing Search Results

New Image/Interface Updates

HHAeXchange is updating the system to fit Accessibility standards. Note that some images in this topic may reflect an older version.

The **Appointments** function displays visits in a grid, depending on the selected **View By** option, with either Patients or Caregivers on the left-most column and the corresponding visit dates across the row. The grid extends seven days based on the selected **From Date**.

At a glance, all scheduled visits are viewed, to include upcoming Agency **Holidays** (set via **Admin > Payroll Setup > Edit Payroll Configuration**) and the Payroll week-ending date (denoted by the blue line). The highlighted blue days are *Saturday* and *Sunday*, denoting weekend days.

PATIENT	TUESDAY - 10/3	WEDNESDAY - 10/4	THURSDAY - 10/5	FRIDAY - 10/6	SATURDAY - 10/7	SUNDAY - 10/8	MONDAY - 10/9
Adams, Sam (LIS-7897654654321436)	S:0800 - 1800 (HHA) V:0800 - 1800 Karrino, Imma	S:0800 - 1800 (HHA) V:0800 - 1800 Karrino, Imma	S:0800 - 1800 (HHA) V:0800 - 1800 Karrino, Imma	S:0800 - 1800 (HHA) V:0800 - 1800 Karrino, Imma			S:0800 - 1800 (HHA) V: - TEMP
Anderson, Adam (LIS-7897654654321414)	S:0800 - 1800 (HHA) V: - Amm, Will	S:0800 - 1800 (HHA) V: - Amm, Will	S:0800 - 1800 (HHA) V: - Amm, Will	S:0800 - 1800 (HHA) V: - Amm, Will			S:0800 - 1800 (HHA) V: - TEMP
Harrison, George (LIS-7897654654321429)	S:0800 - 1200 (HHA) V: - Boyd, Patti S:1300 - 1700 (HHA) V: -	S:0800 - 1200 (HHA) V: - Boyd, Patti S:1300 - 1700 (HHA) V: -	S:0800 - 1200 (HHA) V: - Boyd, Patti S:1300 - 1700 (HHA) V: -	S:0800 - 1200 (HHA) V: - Boyd, Patti S:1300 - 1700 (HHA) V: -			S:0800 - 1200 (HHA) V: - Boyd, Patti S:1300 - 1700 (HHA) V: -

The Appointment Visit Grid: View By Patient

Patient View

Like the Patient **Calendar**, the system highlights *Patient View* visits in **Green** (authorized) or **Pink** (not authorized) depending on the respective **Authorization** rules (as seen on the image above). Visits displayed in white indicate no **Authorization** requirements (such as Private Pay).

Caregiver View

The *Caregiver View* displays visits based on the Caregiver providing service. Like the Caregiver **Calendar**, the respective Patient visits display without the Authorization (Green/Pink) highlighting. The Caregiver View provides other information such as a Caregiver's **Absences** as well as when a Caregiver exceeds 40 hours in a given payroll week by highlighting the "threshold" visit in **Yellow**.

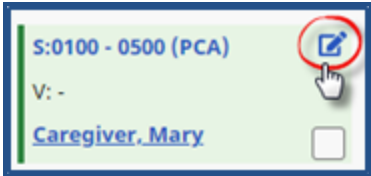
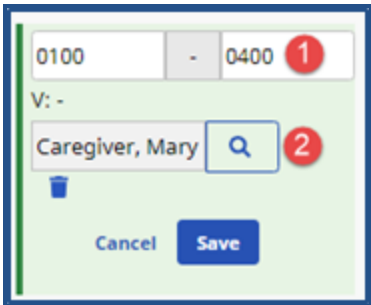
CAREGIVER	MONDAY - 4/4	TUESDAY - 4/5	WEDNESDAY - 4/6	THURSDAY - 4/7
Boyd, Beth (EXA-1005) HOLD				HOLD
Caregiver, Mary (EXA-1003)	ABSENCE Sick Leave	ABSENCE Sick Leave	S:1000 - 1100 (PCA) V:1000 - 1100 Tester, William S:2000 - 2100 (PCA)	S:2000 - 2100 (PCA) V:2000 - 2100 Tester, William

Caregiver Search Results

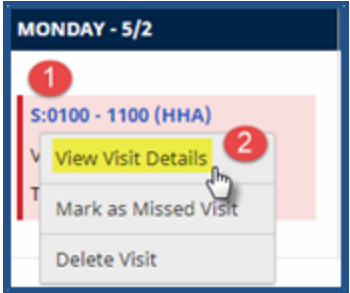
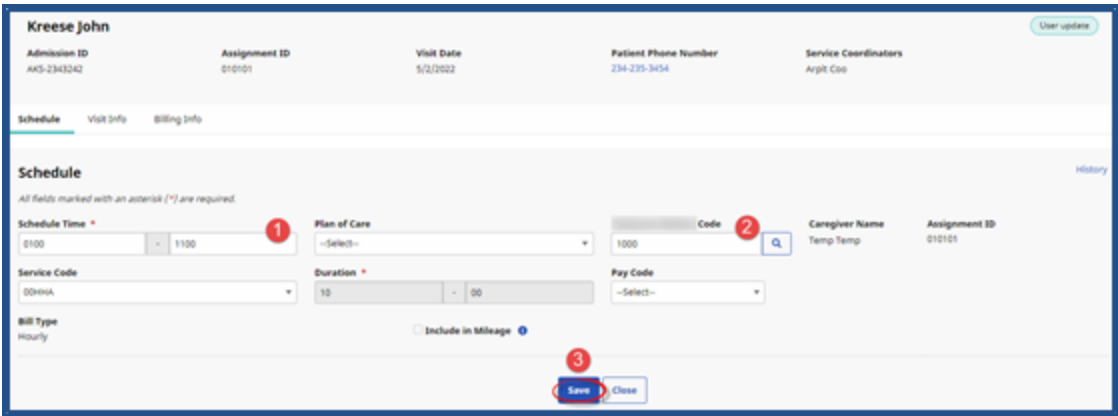
Editing Visits

There are two ways to edit visits via the **Appointments** page. Follow the steps in each option type to edit visits from this page.

Option 1

Step	Action
1	Navigate to Visit > Appointments and generate a search to locate the desired visit based on the Patient or Caregiver.
2	Hover the cursor over the visit cell and click on the edit icon on the top-right corner of the cell (as illustrated in the image). 
3	The Schedule Time fields open (1) and the Caregiver field turns blue (2). Make the desired edits to the visit by entering a new Schedule Time and/or changing the assigned Caregiver. 
4	Click Save to save the changes. Click the delete “  ” icon to delete the assigned Caregiver. Click Cancel to cancel any changes made.

Option 2

Step	Action
1	Navigate to Visit > Appointments and generate a search to locate the desired visit based on the Patient or Caregiver.
2	Click on the Schedule Time of the visit and select <i>View Visit Details</i> from the menu to open the <i>Visit</i> window.  View Visit Details Other options include: • Mark a Missed Visit • Delete Visit • Search for a Caregiver using the Availability Search and Smart Map Availability functions.
3	On the <i>Visit</i> window (<i>Schedule</i> tab) make the necessary edits and click the Save button.  Visit Window: Schedule Tab

Drag/Drop Visits

Visits can also be moved by a drag and drop mechanism. Follow the steps below.

Step	Action
1	On the Appointments grid, hold the left mouse button to lift the entire visit cell (as illustrated). 
2	Drag the cell to the desired cell.  Note: Visits can only be “dropped” in a grid cell for the <u>same</u> Patient.

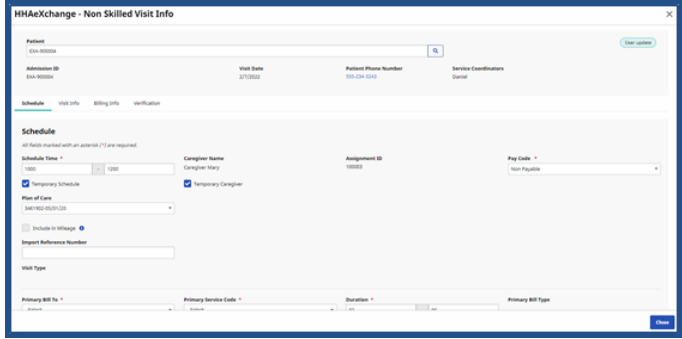
Bulk Edit Visits

Follow the steps below to edit multiple visits simultaneously via the Bulk Update function.

Step	Action
1	On the Appointments grid, hover the cursor over the visit cell and select the blank checkbox on the bottom-right corner (as illustrated in the image). Repeat to select multiple visits.  Select Visits for Bulk Update
2	When one or more visits are selected, two buttons appear directly above the visit cells: Clear Selections and Bulk Update. Select Clear Selections to unselect all visits or Bulk Update to apply a schedule or confirmation change to all selected visits.  Clear Selections and Bulk Update Buttons
3	Select desired Bulk Update action, make the edits and Save to finalize.

Scheduling New Visits

Scheduling new visits on the *Appointments* page allows users to schedule new visits for multiple Patients from a central location.

Step	Action
1	Hover over the desired calendar cell and click the “More Options” icon to create a Skilled or Non-Skilled visit (as illustrated in the image below).  Creating New Visit – Appointments Page
2	Select New Skilled Visit or New Non-Skilled Visit from the menu options.
3	The <i>Visit</i> window opens. Complete the required visit information (denoted with red asterisks). Click the Save button to finalize.  Visit Window

The new scheduled visit appears on the Appointments grid (as illustrated below).



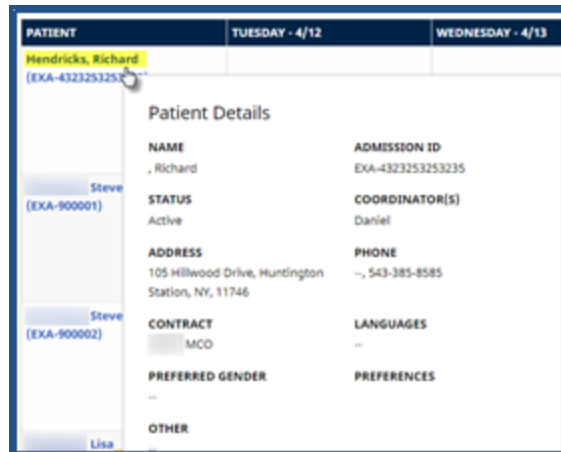
New Visit Scheduled

The Patient Menu

New Image/Interface Updates

HHAeXchange is updating the system to fit Accessibility standards. Note that some images in this topic may reflect an older version.

When searching for visits by *Patient*, hover the cursor over the Patient name in the left-most column to view a Patient's information to include **Name**, **Admission ID**, **Status**, **Coordinator(s)**, **Address**, etc., as seen in the following image.



Patient Information

The system also specifies whether a Patient is part of a **Linked** or **Mutual** case (as illustrated in the image below). Hovering the cursor over the **Mutual** or **Linked** generates a pop-up providing supplementary information of the Patient's case.



Mutual Case

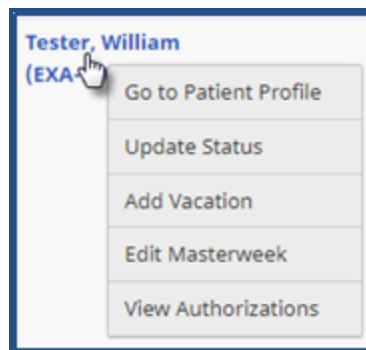
The **Appointments** page displays the Patient's **Status** as *Hold* or *Hospitalized* when applicable. It also marks the Start Date of the **Status** change in the corresponding visit cell.

PATIENT	MONDAY - 5/2	TUESDAY - 5/3
ram, [redacted] (AKS-901638) HOLD ←		
[Dashed line separator]		
PATIENT	MONDAY - 5/2	TUESDAY - 5/3
ram, [redacted] (AKS-901639) HOSP ←		

Patient Status

Click on the **Patient Name** (link) to open a menu of options illustrated in the following image and described in the table underneath.

Note: The menu items described below are available for **Internal Patients**. The menu items available for **Linked Patients** include Go to Patient Profile, Edit Masterweek, and View Authorizations.



Patient Menu

Select...	Description
Go to Patient Profile	Opens the Patient's Profile in a new window.
Update Status	Update the Patient's Status.
Add Vacation	Add vacation dates to the Patient's Calendar.
Edit Masterweek	Edit the Patient's Master Week schedule.
View Authorizations	View the last three Authorizations for the Patient.

The Caregiver Menu

When searching for visits by *Caregiver*, hover the cursor over the Caregiver name in the left-most column to view a Caregiver's information to include **Name**, **Caregiver Code**, **Assignment ID**, **Status**, **Employment Type**, **Address**, etc., as seen in the following image.



The screenshot shows a 'Caregiver Details' form. On the left, there is a list of caregivers with 'Caregiver, Mary (EXA-1003)' highlighted. The main form area displays the following information:

Caregiver Details	
NAME	CAREGIVER CODE
Caregiver, Mary	EXA-1003
ASSIGNMENT ID	STATUS
100003	Active
EMP. TYPE	ADDRESS
PCA, Other (Non Skilled),--	NEW YORK, NY, 10001
PHONE	LANGUAGES
--	--
PREFERENCES	OTHER
--	--

Caregiver Information

Click on the **Caregiver Name** (link) to open a menu options as seen in the following image and described in the table below.

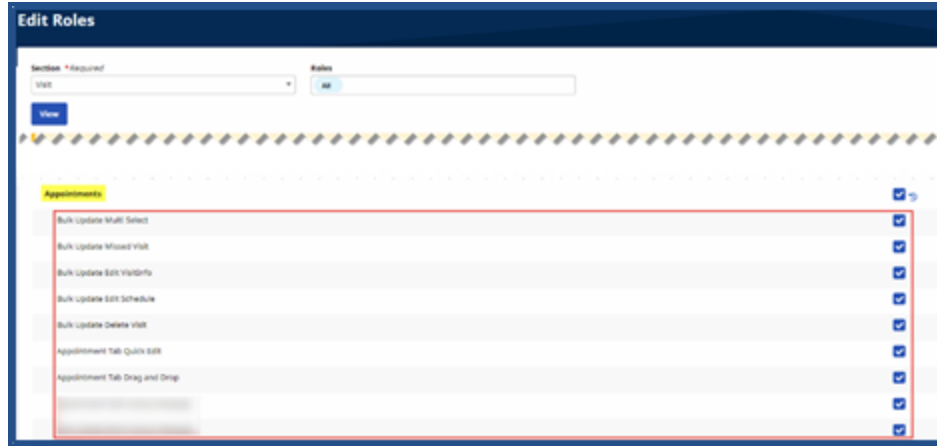


Caregiver Menu

Select...	Description
Go to Caregiver Profile	Opens the Caregiver's Profile in a new window.
Update Status	Update the Caregiver's Status.
Add Absence	Add an absence for the Caregiver.
View Availability	View the Caregiver's availability.

Appointments Permissions

Permissions to the Appointments function are role-based and granted via the Edit Roles page (**Admin > User Management > Edit Roles**) as seen in the following image.



Appointment Function Permissions

Permission	Description (Allows to...)
Appointments	access to the Appointments page.
Appointment Tab Drag and Drop	select scheduled visits and drag them to another calendar cell, drop them in the new date.
Appointment Tab Quick Edit	edit visits using the Edit icon.
Bulk Update Multi Select	select multiple visits at a time on the Appointments page. The following permissions determine the actions to perform when selecting multiple visits. • Bulk Update Delete Visit to delete all selected visits. • Bulk Update Edit Schedule to edit schedule information for all selected visits. • Bulk Update Visit Info to edit confirmation details for all selected visits. • Bulk Update Missed Visit to mark all selected visits as "missed".

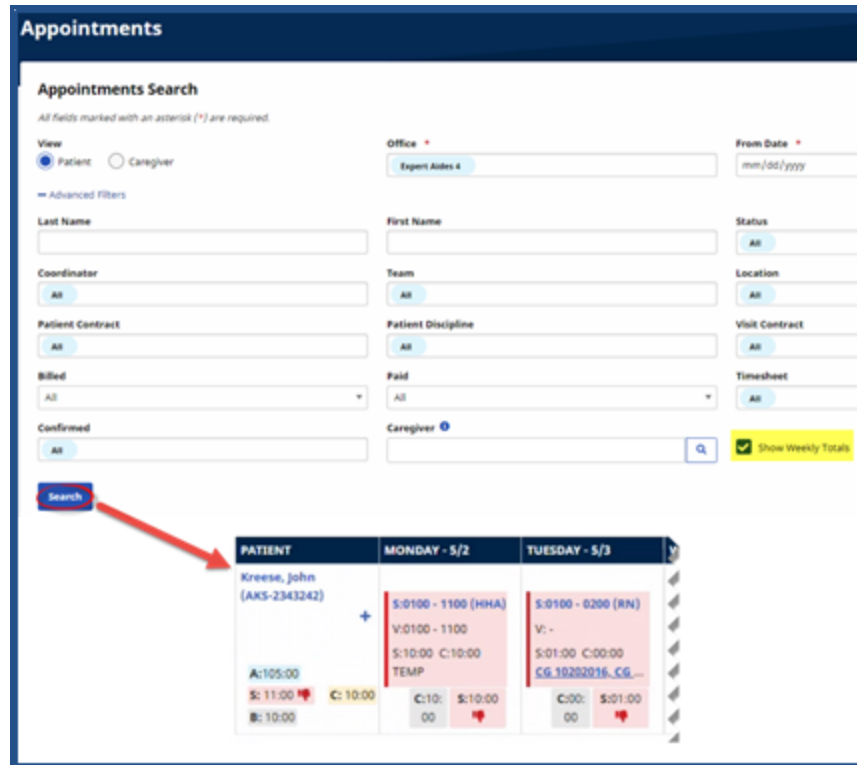
Authorized Hours in the Appointments Module

Authorization buckets in the Appointments Module (*Visit > Appointments*) display Patients' Authorization utilization hours. These Authorization buckets help identify the availability and utilization of authorized hours for a selected payroll week.



Authorization Hours (Utilization)

In the *Appointments* Module search filters, when the **Show Weekly Totals** checkbox is selected, the calendar grid displays the Authorization buckets per Patient, as illustrated in the following image. When enabled, the cumulative and detailed value of *Authorized*, *Scheduled*, *Confirmed* and *Billable* values (hours) are calculated for that Payroll Week and displayed in the *Appointments* page. This calculation applies only to the Patient (not the Caregiver).



Appointments

Appointments Search

All fields marked with an asterisk (*) are required.

View: ☒ Patient ☐ Caregiver

Office: Expert Aides 4

From Date: mm/dd/yyyy

Advanced Filters

Last Name:

First Name:

Status: All

Coordinator: All

Team: All

Location: All

Patient Contract: All

Patient Discipline: All

Visit Contract: All

Billed: All

Paid: All

Timesheet: All

Confirmed: All

Caregiver:

Search

Show Weekly Totals

PATIENT	MONDAY - 5/2	TUESDAY - 5/3
Kreese, John (AKS-2343242)	S: 0100 - 1100 (HHA) V: 0100 - 1100 S: 10:00 C: 10:00 TEMP A: 105:00 S: 11:00 C: 10:00 B: 10:00	S: 0100 - 0200 (RN) V: - S: 01:00 C: 00:00 CG: 10202016 CG... C: 00: S: 01:00

Appointments: Show Weekly Totals Enabled

In addition, the **From Date** filter field only displays the Payroll Week start dates. If unchecked, the Calendar displays without the Authorization buckets and the **From Date** field allows the selection of other dates.

Note: If the Payroll Ending Date is updated for the Office, then the new Payroll Start Date is calculated based on the new Payroll End Date (i.e., Payroll Start Date = Payroll End Date + 6).

Click on the **+** sign to expand on the Authorization bucket details, as illustrated in the image below.



PATIENT

Kreese, John
(AKS-2343242)

+

A: 105:00

S: 11:00 C: 10:00

B: 10:00

Expand Authorization Summary

Based on the image below, the Patient is authorized for **105.00** hours for the week (with **11:00 Scheduled**, **10 :00 Confirmed**, and **10:00** as *Billable* hours). There are 4 types of Authorizations applicable to this Patient for the selected period (refer to each row with a breakdown of hours per).

PATIENT	MONDAY - 5/2	TUESDAY - 5/3	WEDNESDAY - 5/4	THURSDAY - 5/5
Kreese, John (AKS-2343242)	S:0100 - 1100 A:105:00 S: 11:00 B: 10:00	S:0100 - 0200 (RN) C:10:00 S:10:00		
	1 (00HHA) auth0789 (001-Hourly) No Auth			
	A:05:00	A:100:00	A:00:00	A:00:00
	S:00:00	S:00:00	S:11:00	S:00:00
	C:00:00	C:00:00	C:10:00	C:00:00
	B:00:00	B:00:00	B:10:00	B:00:00

Authorization Summary View

For more Authorization information, hover over the various links of the Authorization type on the color-coded expanded window. Refer to the [Authorization Bucket Legend](#) section below for color definitions. In this example, the details display the *Authorization Number*, *Service Code*, *Authorization Type*, *From/To Dates*, and *Max Hours*.

PATIENT	MONDAY - 5/2	TUESDAY - 5/3	WEDNESDAY - 5/4	THURSDAY - 5/5
Kreese, John (AKS-2343242)	S:0100 - 1100 A:105:00 S: 11:00 B: 10:00	S:0100 - 0200 (RN) C:10:00 S:10:00		
	1 (00HHA) auth0789 (001-Hourly) No Auth			
	A:05:00	A:100:00	A:00:00	A:00:00
	S:00:00	S:00:00	S:11:00	S:00:00
	C:00:00	C:00:00	C:10:00	C:00:00
	B:00:00	B:00:00	B:10:00	B:00:00

Authorization Detail View: Weekly Authorization Type

Note: Each Authorization displays according to the Authorization Type (Monthly, Weekly, Daily, or Entire Period).

Authorization Bucket Legend

The following tables provide definitions for the various colors.

Summary View

Authorized	Always displays in blue
Scheduled	Displays in green if matching authorized hours, displays in pink if value exceeds authorization, displays in gray if value is less than authorized.
Confirmed	Always displays in orange
Billable	Displays in green if matching authorized hours; in gray if less than the confirmed duration and authorization.
No Authorization	Anything without authorization displays in gray .

Detail View

Red	Authorization 1
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Purple	Authorization 2
Orange	Authorization 3
Blue	Authorization 4
Green	Authorization 5+
Gray	No Authorization

Calculating Bucket Values

There are 4 Authorization Types taken into consideration when calculating the bucket values (for a Payroll week), including: *Daily*, *Weekly*, *Monthly*, and *Entire Period*. To calculate the bucket values, visits must meet the Authorization Period criteria for the selected Payroll Week.

When a visit is not associated to any Authorization, then those visit values are calculated in the *No Auth* bucket. In these cases, both the Authorized and Billable values are “0”.

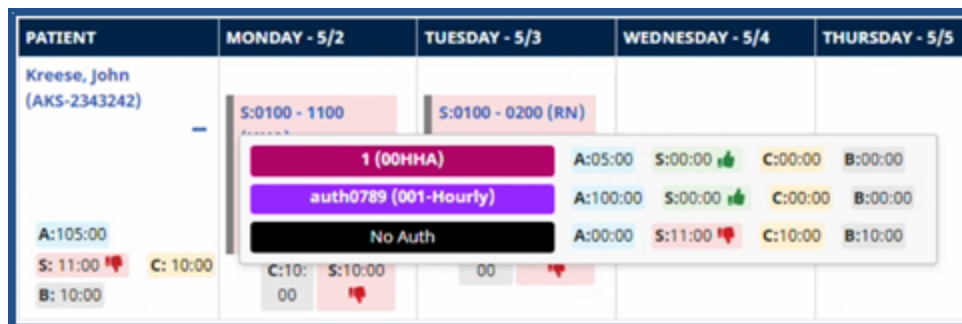
The *Scheduled* and *Confirmed* hours are calculated based on the visits for each Patient for the selected Payroll Week based on Authorization. The *Billable* bucket is the sum of all Billable values in the detail view.

The hours are distributed by the *Confirmed* time for each Authorization proportionate to the number of *Scheduled* hours for each Authorization. The following is the priority of allocation:

1. Primary Contract
2. Secondary Contract
3. Service Code associated with Authorization
4. Authorization created date

Apply time as per the Priority rules above until all hours are met; then apply remaining hours to subsequent Authorizations.

For example, the image below shows that a visit has multiple Authorizations (**1(00HHA)** and **auth789 (001-Hourly)**) and the Authorized visit hours are divided based on the priority rules described above.



PATIENT	MONDAY - 5/2	TUESDAY - 5/3	WEDNESDAY - 5/4	THURSDAY - 5/5
Kreese, John (AKS-2343242)	S: 0100 - 1100	S: 0100 - 0200 (RN)		
	1 (00HHA) auth789 (001-Hourly) No Auth			
	A: 105:00 S: 11:00 B: 10:00	A: 05:00 S: 00:00 C: 10:00	A: 100:00 S: 00:00 C: 00:00	A: 00:00 S: 11:00 C: 10:00

Calculation of Bucket Values

Other factors to consider in the calculation include:

- Authorization bucket values are rounded up to the nearest 15 minutes.
- If the Service Code associated to an Authorization is set to bypass prebiling, then those visits do

not display in the Authorization buckets. The same applies to Contracts that have the Authorization required option deselected.

To display this feature by default, navigate to **Admin > Agency Profile** and select the **Default to Show Weekly Totals in Appointments** checkbox.



The screenshot shows the 'Agency Info' page in the HHAexchange system. The page has a dark blue header with the title 'Agency Info'. Below the header, there is a section titled 'Agency Info' with a note: 'All fields marked with an asterisk (*) are required.' The page is divided into two columns of settings. In the left column, under the 'MID Order XCD Code Requirement' section, the 'Default to Show Weekly Totals in Appointments' checkbox is checked and highlighted with a yellow box. Other checkboxes in this column include 'Vendor Export Hyperlink', 'Validate XCD Code Selections', and 'Validate Truncated XCD Code Selection'. In the right column, under the 'Hide Manual Confirmations on Confirm Timesheets Page When' section, there are several unchecked checkboxes: 'Visit start time is updated', 'Visit end time is updated', 'Master Week Rollover on Deleted Visits', 'Enable Automated Non-Compliance Restrictions', 'Maintain Pay Code after Changing Caregiver on Visit', 'Care Insights Dashboard Default Coordinator/Nurse/Resignee', 'Copy Note To All Open Care Insights Alerts By Default', and 'Turn off Orders and Goals Integration'.

Agency Info Page: Enable Authorization Hour Buckets

Calculation Updates

Visit and Daily Totals for Scheduled and Confirmed hours provide calculated totals in HH:MM format. To view, select **Show Weekly Totals** checkbox and select the required **From Date** field when searching for appointments.

Visit Totals (hours) are displayed in each visit cell. Scheduled is denoted with an S while Confirmed is denoted with a C. The Daily Total (Scheduled and Confirmed Hours) is summed at the bottom of each cell, displayed in gray boxes.

Note: If a visit is marked as **Missed**, then the scheduled hours for that visit are not counted in the daily total.

PATIENT	MONDAY - 5/2	TUESDAY - 5/3
Kreese, John (AKS-2343242)	S:0100 - 1100 (HHA) V:0100 - 1100 S:10:00 C:10:00 TEMP A:105:00 S: 11:00 C: 10:00 B: 10:00	S:0100 - 0200 (RN) V: - S:01:00 C:00:00 CG 10202016, CG 10 C:00:00 S:01:00

Visit Totals and Daily Totals