Release Notes

Enterprise (New UI) Version 24.03.01

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Overview

These release notes contain a high-level overview of any updates and/or new functionality introduced to the HHAeXchange Enterprise software. As HHAeXchange is permission-based, not all functionality is available for every role within an Agency. Further inquiry concerning the contents of this document should be directed to HHAeXchange Customer Support.

In this Release...

Below listed are the features included in the 24.03.01 release. Each has a brief explanation of the updates.

Adjust All Claims Option Added to Bulk Claims Resubmission

An **Adjust All Claims** button has been added to the *Add Original Claims E-Submission Batch* page (pictured below) to facilitate bulk claims adjustments. Functionality remains the same whether submitting original claims or adjusting claims.
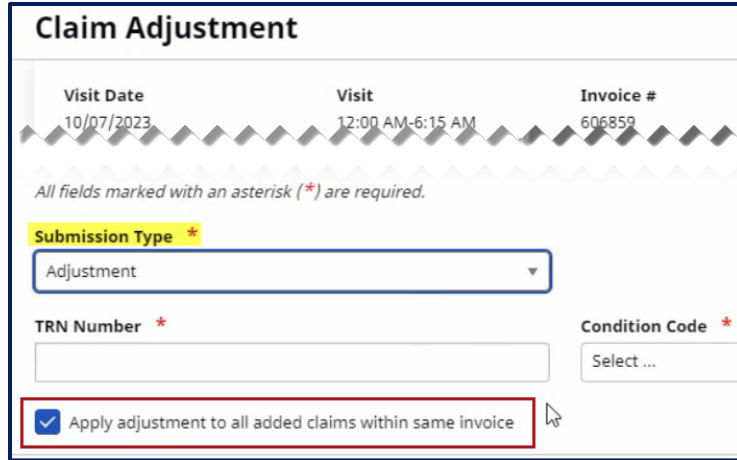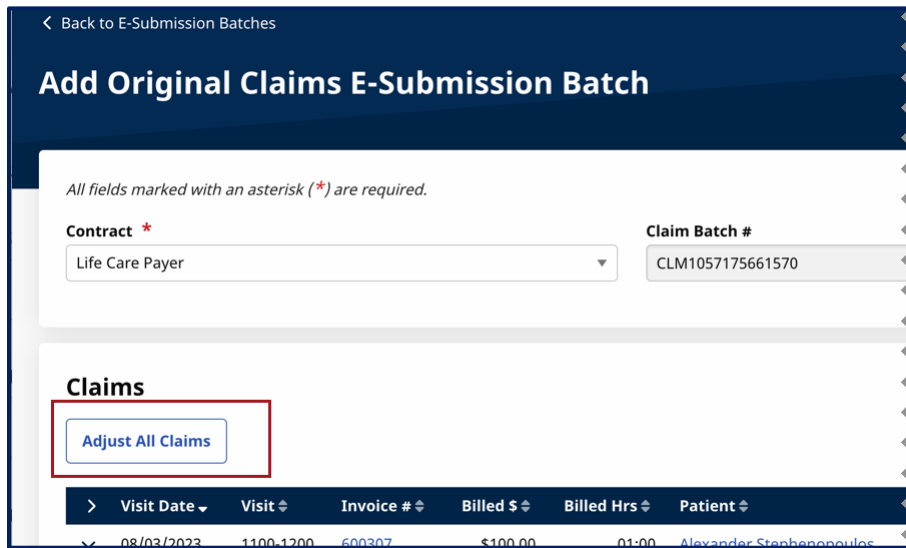

Claims Resubmission – Adjust All Claims Button

Clicking on the **Adjust All Claims** button opens the *Adjust All Claims* window (shown below) to select the **Submission Type** (*Original*, *Adjustment*, or *Void*). Depending on the selected **Submission Type**, applicable fields appear to complete (specifically, when *Adjustment* or *Void* are selected).
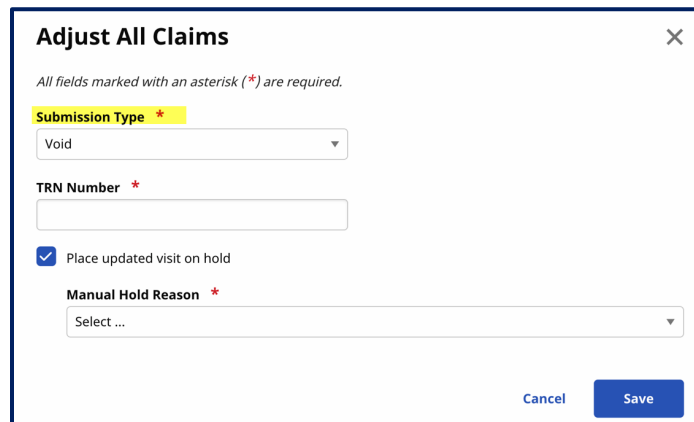
Adjust All Claims Window

In addition, an **Apply adjustment to all added claims within same invoice** checkbox field has been added to the *Claim Adjustment* window (when adjusting a specific claim) replacing the former **Update** dropdown field.
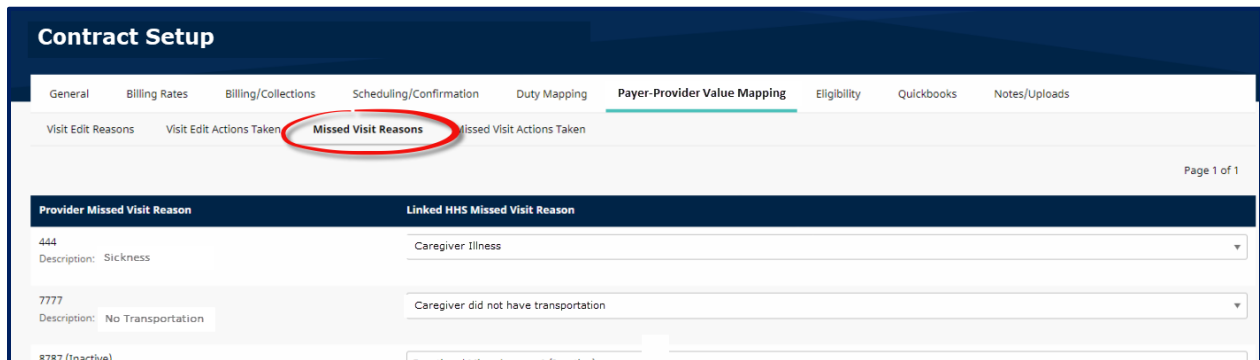
Claim Adjustment Window – Apply Adjustment to All Claims Checkbox

Missed Visit Reason Value Mapping

A *Missed Visit Reasons* tab has been added to the Payer-Provider Value Mapping feature in the *Contract Setup* (**Admin > Contract Setup > Search Contract**) for providers to associate (map) their created values to payer-created values in the system. This applies to the already existing *Duties*, *Visit Edit Reasons*, and *Visit Edit Action Taken* values.

In the image below, the *Missed Visit Reasons* tab is selected. From here, the provider-created values are seen on the left column (**Provider Missed Visit Reason**), and the payer-created values are on the right column (**Linked Payer Missed Visit Reason**). To associate a provider value to a payer value, select the applicable value to map from the Linked Payer column.

Payer Provider Mapping – Missed Visit Reasons

Variable Schedules Suggested Start and End Times

A Variable Schedule shows a scheduled duration on specific days of the week. A **Suggested Schedule Time** option has been added to the visit *Schedule* tab for providers to indicate a suggested time frame for a visit to occur. This option is available only for **Daily Variable** and **Weekly Variable** schedule types.

Schedule Tab – Suggested Schedule Time Fields

Note: *A suggested schedule time is a suggestion and does not affect or limit when a visit takes place.*

Across the system, the Suggested Schedule Time option has been implemented and displays where patient schedules or scheduling functions appear such as Calendar, Copy and Create, Copy and Paste, Appointments page, visit Schedule tab, Visit Search, Master Week, and on several e-Billing pages (as shown below).

E-Billing Resubmit Claims – Schedule Types and Schedule Columns

Forms Feature in Patient Notes

The **HHAeXchange Forms** tool is an integrated form solution allowing agencies to better manage and complete state forms directly from the system. In this release, providers can now add a form to a Patient Note. Refer to the HHAeXchange Forms Feature document for details and instructions.

Dashboard Custom Views and Added Features
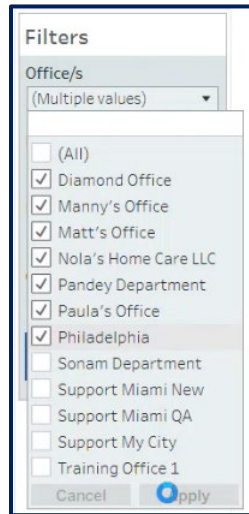
Custom Views

BI Dashboards have been enhanced to enable users to create and save custom views, based on selected filters. With custom views, users can access their saved set of filters to access specific information on dashboards without having to reselect filters each time.

Users can create multiple custom views and set one as default to always open to the selected custom view. The system defaults to Original View to show all details for all dashboards. Click the View tab to open the Custom Views window to toggle between views, as needed.
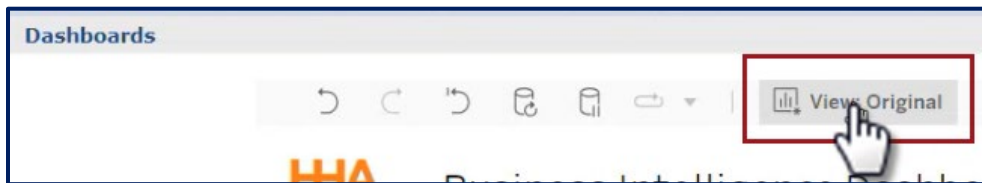
Create a Custom View

Complete the following steps to create a custom view on any dashboard.
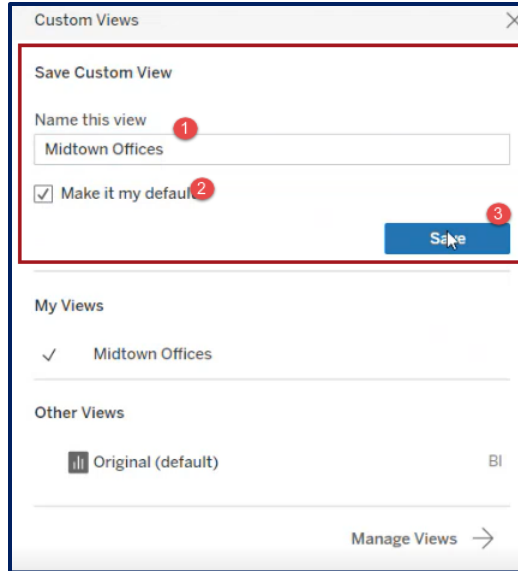
1. Select the desired filters and click **Apply**.

Select Filters
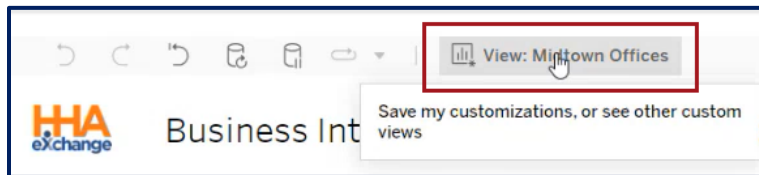
2. Click the **View** tab at the top bar.

View Original - Tab

3. The Custom Views window opens. Enter a title for the custom view in the **Name this view** field. To make this a default view, select the **Make it my default** checkbox and click *Save*.

Custom Views Window – Create a Custom View

Once created and made default, the Custom View replaces the Original View on the view tab, as shown below. To toggle between Original and other saved custom views, click on the tab to open the Custom Views window and select other views from the My Views section.
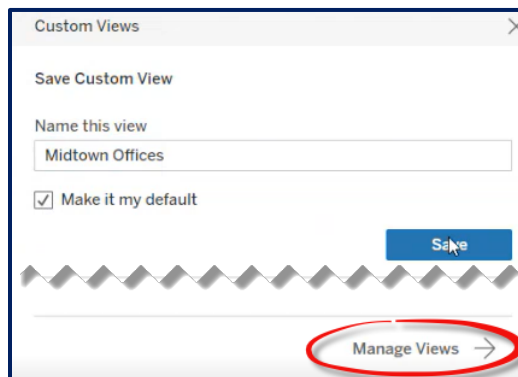

**Custom View as Default**

Manage a Custom View

Custom views can be edited, renamed, or deleted from the saved views. To manage a custom view:

1. Select the View tab at the top.
2. The Custom Views window opens. On the My Views section, select the applicable custom view (if multiple have been created).
3. At the bottom of the window, click the **Manage Views** button (as shown below).

Manage Views Button

4. A set of icons appear under the My Views section of the window (as shown).
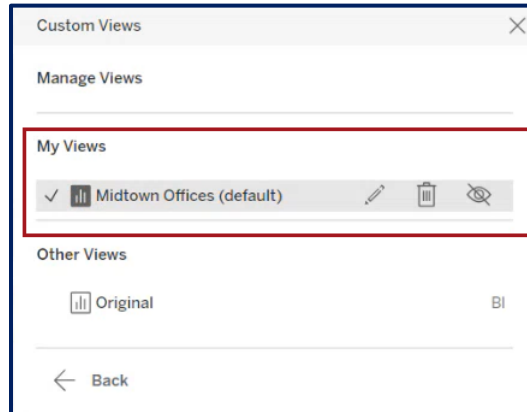
Manage View Options

- Click the pencil icon to edit or rename the custom view; or
- Click the trash bin icon to delete the custom view. A confirmation window opens when deleting a custom view. Click *Delete* as prompted to remove the view.

5. Click **Back** to return to the dashboard.
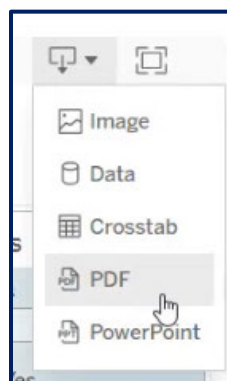
Added Functionality

The **Download** and **Full Screen View** options have been added to all dashboards.
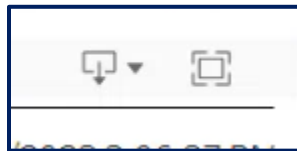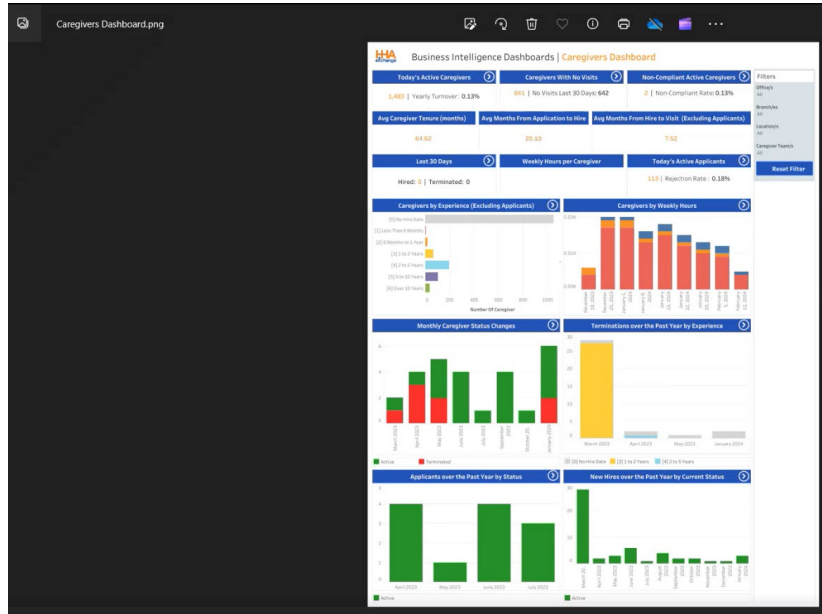

Added Features

Download

To download dashboard information, click the download icon and select the desired output (such as PDF or PowerPoint).
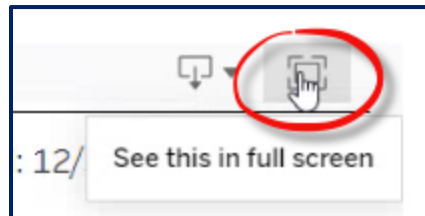

Download Output Options

Follow the system prompts to download the file to your workstation. In the following example, an image has been created as an output file.
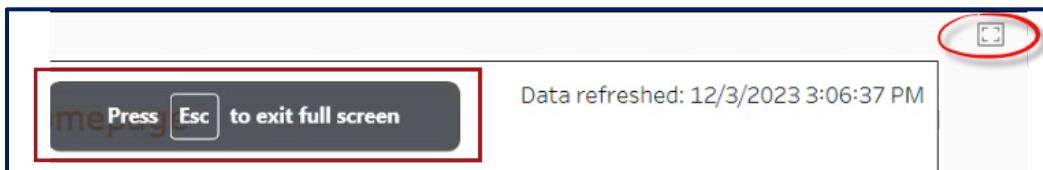

Downloaded PDF

Full Screen

Click the **Full Screen** icon to expand the dashboard on the screen to full capacity.

Full Screen Option

To exit Full Screen, click the *Esc* key or click the Full Screen icon to return to standard view.

Return to Standard Screen