Admin Functions Process Guide

User Guide

Phone: (855) 400-4429 • Fax: (718) 679-9273

Contents

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Admin Functions

Overview

The functions under the Admin module serve as the building blocks for the entire the system. Proper setup and maintenance of these functions is essential to the continued efficiency of the Enterprise platform.

This category covers the critical system components managed in the **Admin** module to include *User Management*, *Reference Table Management*, *Office Setup*, *Agency Profile*, *Contract Setup*, *Caregiver Compliance Setup* and numerous other functions in the HHAeXchange (HHAX) system.

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

User Management

Tip: Press the **Ctrl-F** keys to search this topic.

Users are employees who handle the logistics at an Agency. A User is assigned a **Role**, such as *Admin*, *Coordinator*, or Collection Representative. **Permissions** in the system are role-based; therefore, permissions are enabled for a role (rather than for an individual User). Functions, features, and modules are dictated by system permissions to include functionality within the Admin tab.

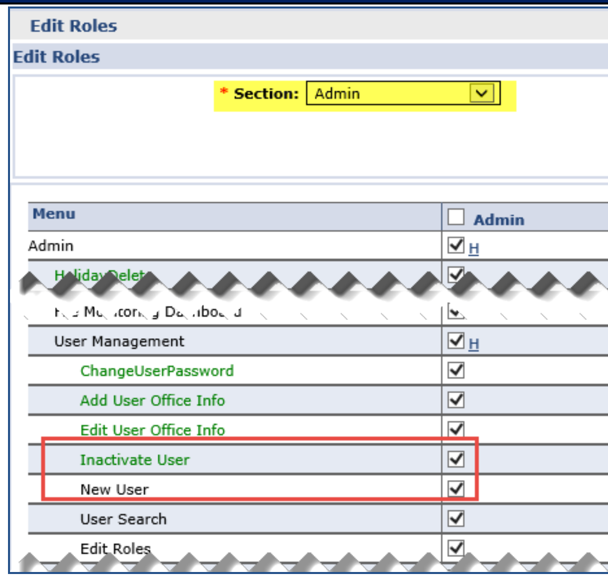
Permissions are granted and modified for Roles via the **User Management** function under the *Admin* tab. Use the **User Management** function to create a *New User*, generate a *User Search*, and *Edit Roles*.

New User

Users with roles that are assigned the *Edit Roles* permission are granted the permission to add **New Users** and *deactivate User Accounts* in the system. The **New User** and **Inactivate Users** permissions must be enabled by an Agency Admin for a selected role to access respective functionality. This section provides instructions on how to assign permissions to a role, create new users in the system, and deactivate user accounts.

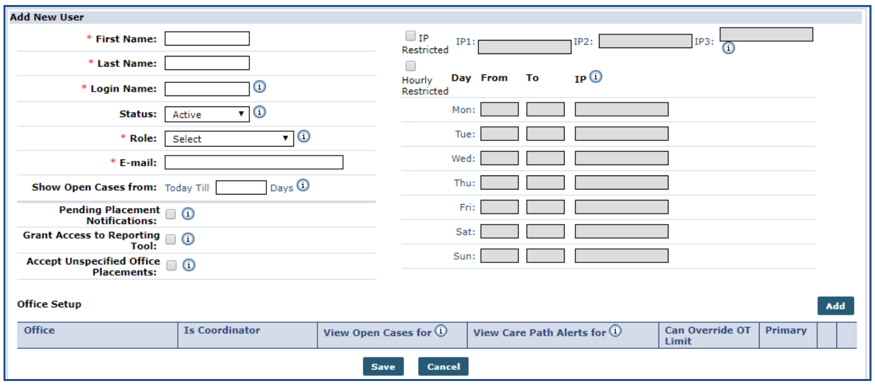
Assigning Permissions to a Role

Step	Action
1	Navigate to ***Admin > User Management > Edit Roles***.
2	Select the system section from the **Section** field dropdown (required) and role from the **Roles** field dropdown (optional).
3	Select the **New User** and **Inactivate Users** under the User Management section (as illustrated in the image).

Step	Action
	 **Permissions**
4	Click ***Save*** (at the bottom of the page) to apply the changes.

Creating a New User

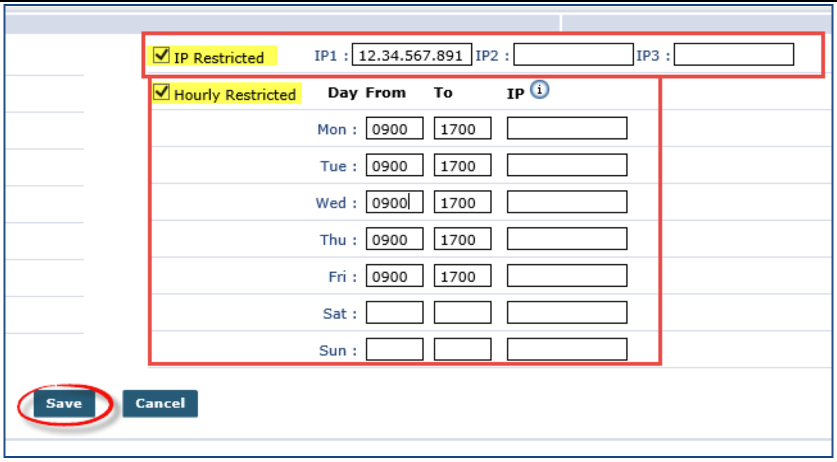
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Admin > User Management > New User to access the Add New User page.</td></tr>
<tr><td>2</td><td>The Add New User page opens. Complete the required fields (denoted with a red asterisk), as illustrated in the image below and described in the table underneath.



Add New User Page

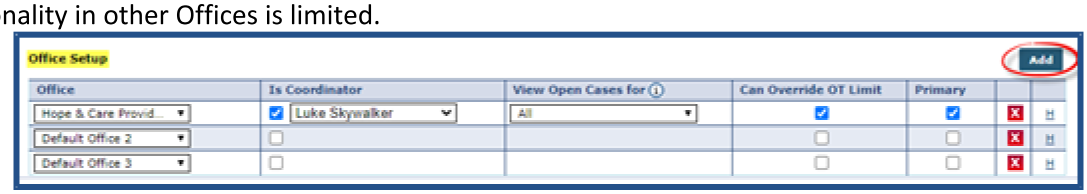
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>*First Name</td><td>(Required) Enter the user's first name.</td></tr>
<tr><td>*Last Name</td><td>(Required) Enter the user's last name.</td></tr>
<tr><td>*Login Name</td><td>(Required) Enter the login name for the user to enter the system. Login name must be unique within an Agency AND across the HHAX platform. Username can include letters, numbers, underscores, dashes, @ sign, or dots. Note that there is a 50-character limit to any login name. Email address can be used.</td></tr>
<tr><td>*Email</td><td>(Required) Enter the user’s unique email address. This email is used for any assigned system notifications to include the initial email with temporary password to log in to the system.</td></tr>
<tr><td>*Role</td><td>(Required) Select the Role(s) for the user.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>On this page, User Access location, days, and times can be restricted using the IP Address fields. Select one or both options as illustrated in the image to the right and described in the table below.

Note: These restrictions are optional.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


Access Restriction

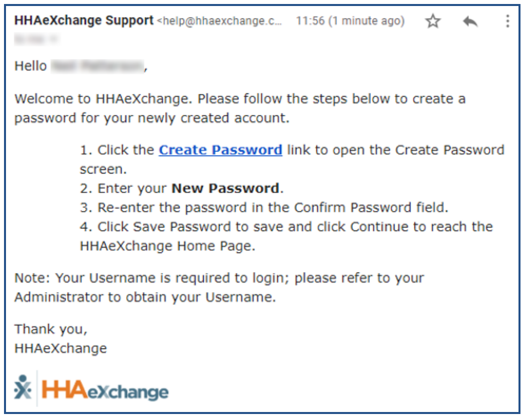
<table>
<tr><th>Select</th><th>To...</th></tr>
<tr><td>IP Restricted</td><td>restrict access to the system to up to 3 unique IP addresses.</td></tr>
<tr><td>Hourly Restricted</td><td>specify the days and hours when Users may access the system. A valid IP address for each day of the week can also be added.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Select other permissions specific to the user such as Pending Placement Notifications, Reporting Tool access, and Accept Unspecified Office Placements.</td></tr>
<tr><td>5</td><td>Additional settings can be indicated for the user under the Office Setup section. Click the Add button to assign other Offices and functionality (per Office) to the user. For example, the image below illustrates that this user is the Coordinator in the Hope & Care Providers Office, able to view all Open Cases for the selected Coordinator. This user can also Override OT Limits for that Office.

Only one Office can be the designated Primary at a time. Once a Primary Office is selected, functionality in other Offices is limited.


New User: Office Setup</td></tr>
<tr><td>6</td><td>Click the Save button to create the New User’s profile. Thereafter, the user receives an email with a temporary password to log in to the system.</td></tr>
<tr><td>7</td><td>Provide the user his/her login name. The email does not include this information.</td></tr>
</table>

Create Password for a New User

When an Agency Admin creates a New User Account, a Create Password process is generated by the system once the new profile is saved. The following examples demonstrate the steps for users to Create a Password. The User receives the **Create Password** email with link and instructions. Upon clicking on the **Create Password** link, the user is routed to the Login screen, seen below.



HHAeXchange Support <help@hhaexchange.c... 11:56 (1 minute ago)

Hello [redacted],

Welcome to HHAeXchange. Please follow the steps below to create a password for your newly created account.

1. Click the **Create Password** link to open the Create Password screen.
2. Enter your **New Password**.
3. Re-enter the password in the Confirm Password field.
4. Click Save Password to save and click Continue to reach the HHAeXchange Home Page.

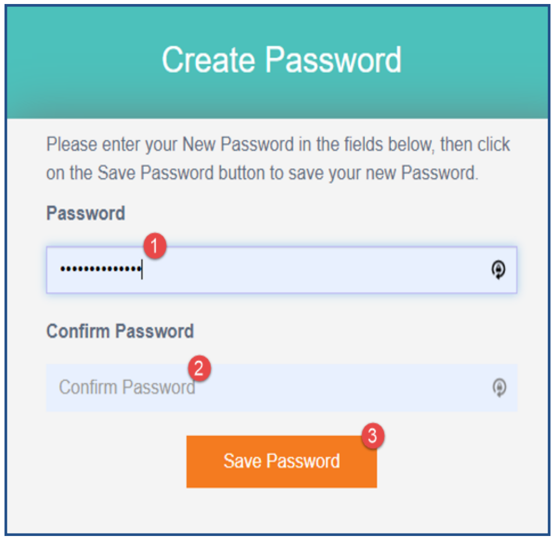
Note: Your Username is required to login; please refer to your Administrator to obtain your Username.

Thank you,
HHAeXchange

The image on top illustrates a standard Create Password Login page. The image following that illustrates the Login page for Agencies configured to require Terms and Conditions.

On this screen, the user:

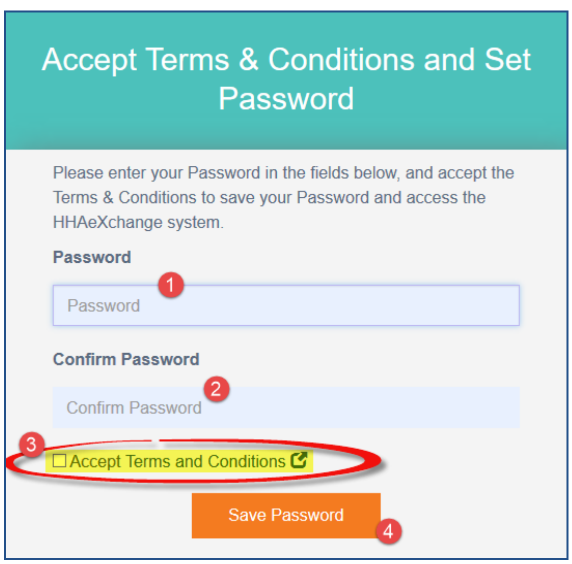
1. enters a **Password**;
2. re-enters the password in the **Confirm Password** field; and
3. Clicks on ***Save Password*** to continue.



Create Password: Standard Login Page

On this screen, the user:

1. enters a **Password**;
2. re-enters the password in the **Confirm Password** field;
3. selects the required **Accept Terms and Conditions** checkbox; and
4. click on ***Save Password*** to continue.



Create Password: With Terms and Conditions

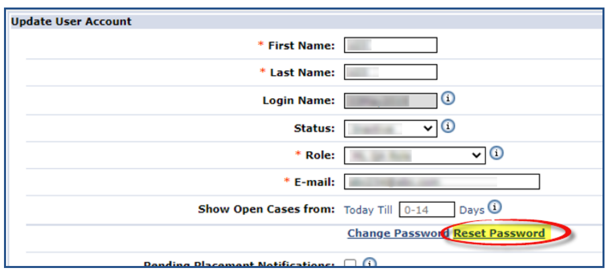
The system guides the user with instructions and password requirements. Refer to the Self-Service Password Reset Job Aid for further guidance.

Password Reset Initiated by Administrator

Agency Admins can initiate a Password Reset for any Agency user for various purposes, typically for security measures (for example, if credentials are compromised). Instead of providing a password for the user, the process is automated prompting the user to reset the password after the initiation from the Agency Admin.

Initiating the Password Reset

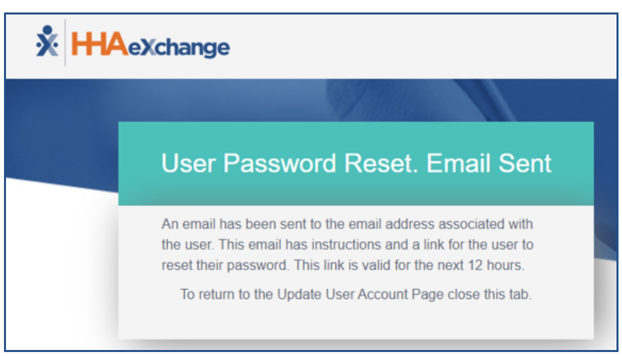
A **Password Reset** can be initiated via the *User Account* page (***Admin > User Management > User Search***). On the *Update User Account* page, click on the **Reset Password** link (as seen in the image below).



User Account Page: Reset Password Link

The system alerts the Agency Admin that an email has been sent to the user with a Reset Password link, effective for the next 12 hours.

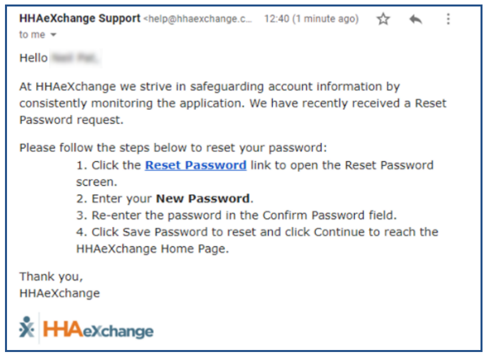
Click out of the alert to close the window and return to the User Account page. No further action required from the Agency Admin.



Password Reset Alert

User Password Reset

The Agency user receives an email with the link and instructions to reset their password. The User follows the prompts to reset their password accordingly. Refer to the Self-Service Password Reset Job Aid for further guidance and password requirements.



HHAeXchange Support <help@hhaexchange.c... 12:40 (1 minute ago)
to me

Hello

At HHAeXchange we strive in safeguarding account information by consistently monitoring the application. We have recently received a Reset Password request.

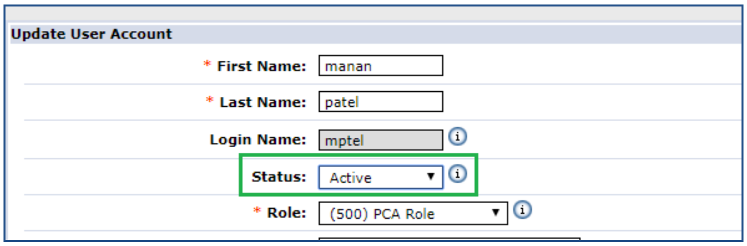
Please follow the steps below to reset your password:

1. Click the **Reset Password** link to open the Reset Password screen.
2. Enter your **New Password**.
3. Re-enter the password in the Confirm Password field.
4. Click Save Password to reset and click Continue to reach the HHAeXchange Home Page.

Thank you,
HHAeXchange

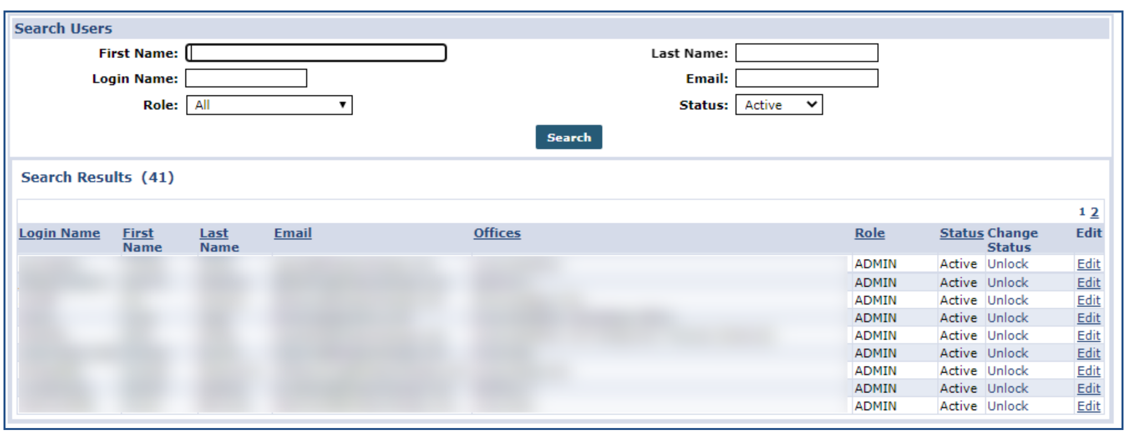
Deactivate User Account

Only roles with the **Inactivate Users** permission can deactivate a user; otherwise the **Status** field is unavailable to edit.

Step	Action
1	Navigate to ***Admin > User Management > Search User***.
2	Click on the **Edit** link to access the *Update User Account* page.
3	From the **Status** field select *Inactive.*  **User Status**
4	Click ***Save***. Once saved, the user cannot access the system with given credentials.

User Search

To search for a User in the system, either enter the User's **First Name**, **Last Name**, **Login Name**, **Email** address, **Role**, or **Status** to narrow a search or simply click on the ***Search*** button to view all Users.



User Search

The **Search Results** include the following information per line item:

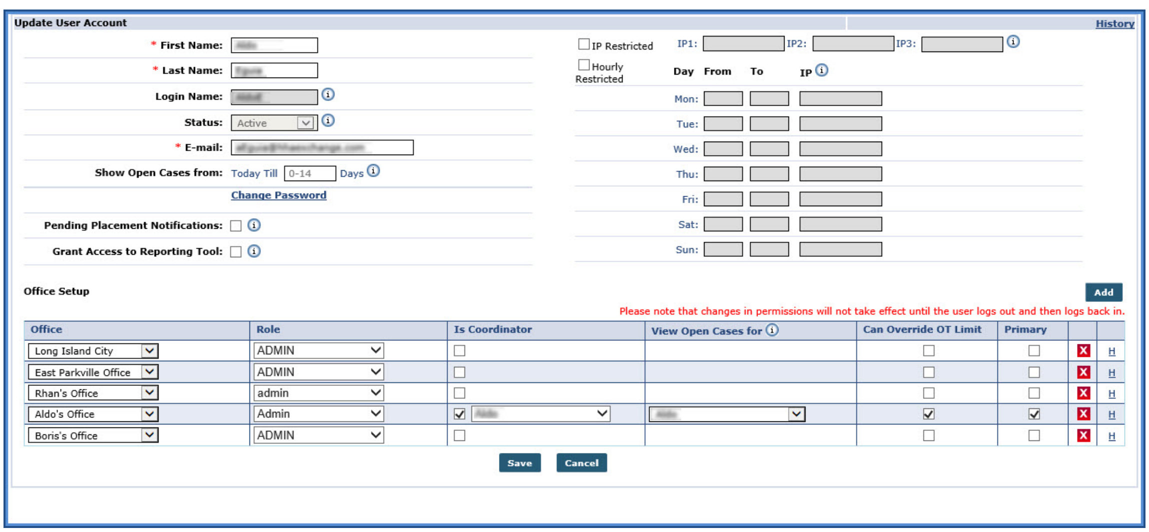
Column	Description

Login Name	User's HHAX login name.
First Name	User's first name
Last Name	User's last name
Email	The email address associated with the user in the HHAX system.
Offices	All associated Offices the User is assigned to.
Role	Role(s) assigned to the User
Status	User Account Status (*Active* or *Inactive*)
Change Status	Link allowing an Admin to unlock a User's Account
Edit	Link allowing an Admin to Edit a User's Profile

Update User Account

On the Search Results, click on the **Edit** link for the applicable User to open the *Update User Account* page, as illustrated in the image below.

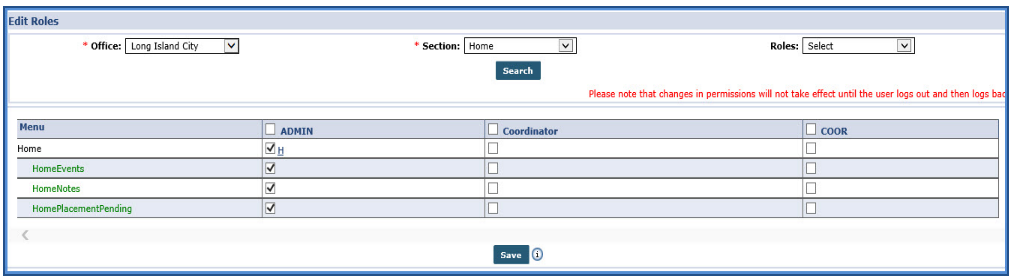
This page contains the user's information as entered when the profile was created, refer to the Creating New User section for field descriptions. From here, make the necessary edits, to include changing the Status, resetting the Password, applying restrictions, or editing Office Setup. Click ***Save*** to apply.



Update User Account

Edit Roles

The **Edit Roles** function allows Agencies to edit the permissions of any *Role* created for the Agency by HHAX. Complete the steps below to edit permissions for a Role.

Step	Action
1	Navigate to ***Admin > User Management > Edit Roles***.
2	Select the applicable and required **Office** and **Section** fields. The **Role(s)** field is optional. If a specific *Role* is not selected, then the system displays all *Roles* for the Agency (to compare permissions).  **Edit Roles Page**
3	Select/deselect Permissions (left-most column) according to role.
4	Click ***Save***.

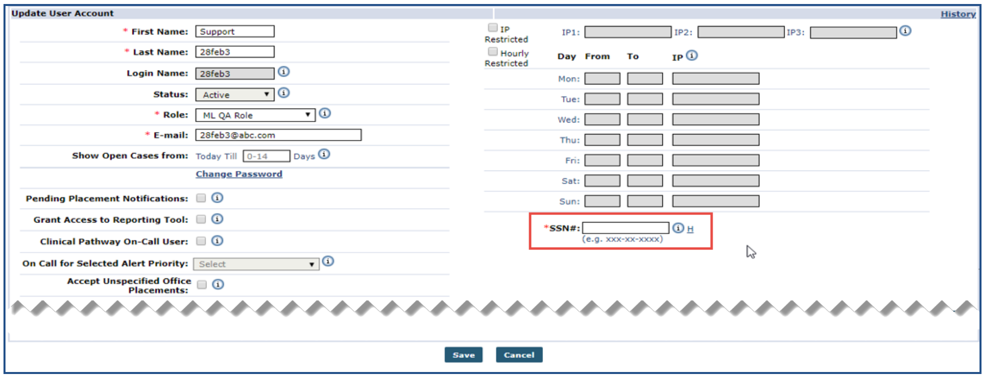
Note: Roles can only be created by HHAX.

Track and Prevent Duplicate SSN for System Users

DISCLAIMER
This feature is enabled by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

In the *User Account* page (***User Management > New User or > Update User Account***) Agencies can use the **SSN** field to capture a system user's Social Security Number (SSN), as seen in the image below. This feature is used to track and validate a system user's SSN ensuring that duplication is detected across the platform for *Active* and *Inactive* users. This functionality works similar to how a Caregiver SSN is tracked and validated in the system.

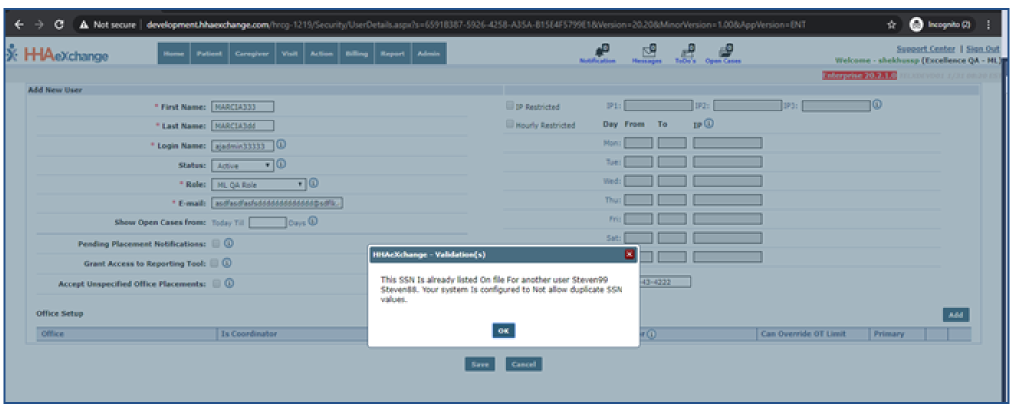
While not a requirement for most agencies, some markets are required to capture and track a system user's SSN to detect duplication and fraud. If requirement is enabled, then the **SSN#** field appears with a red asterisk; otherwise the field appears as optional. To view the history of the SSN for the user, click the **H** link to the right of the **SSN#** field. The history is only applicable if the SSN# field is required.



User Profile: SSN# Field

Note: If enabled, this functionality also applies to User Profiles imported into the system.

If a duplicate SSN is entered in the system, then the system issues a validation message not allowing the profile to be saved (as seen in the image below).



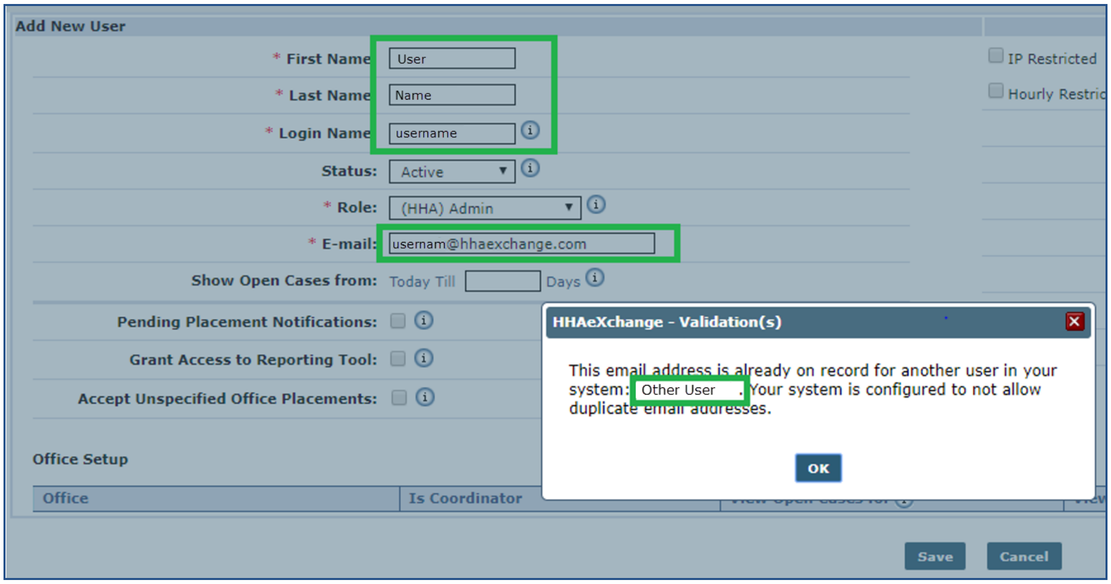
Validation: Duplicate SSN on File

Prevent Duplicate User Email

DISCLAIMER
This feature is enabled by HHAX System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

Providers can prevent duplication of email addresses in the system. Once enabled, the system validates for user email addresses to be unique across the entire platform when creating or editing a User Account (***Admin > User Management > Update User Account***). This applies to both *Active* and *Inactive* email addresses.

When a User attempts to create or edit a User Account using a current or former email address (*Active* or *Inactive*), the system issues a validation not allowing the duplicate email address to be saved.

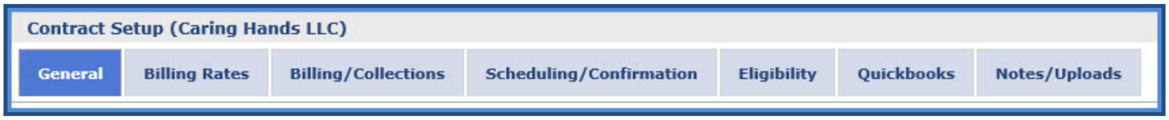


Validation: Duplicate Email Address Detected

Note: *If enabled, this functionality also applies to User Profiles imported into the system.*

Contract Setup

The **Contract Setup** function is comprised of seven tabs (pages) to optimize the organization of fields and information according to subject (as seen in the following image).



Contract Setup Tabs

Refer to the Admin Contract Setup category for full details on this functionality.

Payroll Setup

The **Payroll Setup** page is used to set up *Discipline Rates*, *Holiday Payroll*, and other payroll related rules such as *Overtime Rates*, *Pay Preference*, and *Pay Preference*. This section covers the fields in the three subsections on the Payroll Configuration page. Refer to the [Payroll category](#) for further details and instruction on the Payroll functionality.

Note: Some fields can only be edited by HHAeXchange Customer Support.

General Section

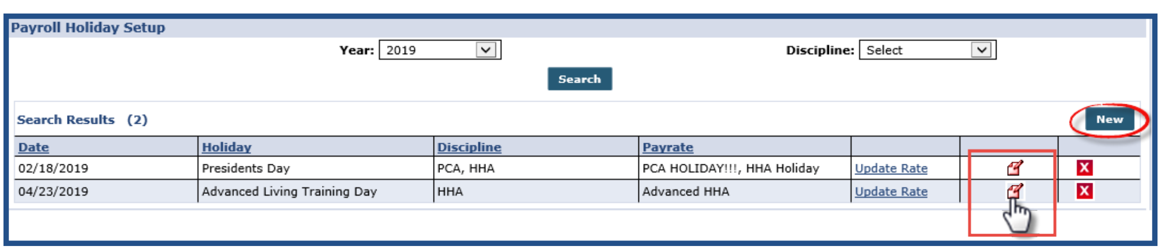
Edit Payroll Configuration Page: General Section

Field	Description
*Configuration Name	(Required) Enter the name of the set of rules created on the page. An Agency may have multiple Payroll configurations, each with a different name. This is useful for Agencies that operate out of several Offices; each requiring a distinct set of Payroll rules.
Status	Select *Active* or *Inactive*
Office(s)	Select the applicable Offices to associate the Payroll Configuration to. Click the **Edit** link to add/edit Offices.
Pay Preference (Skilled / Non-Skilled)	Select whether to run Payroll *Weekly* or *Bi-Weekly*.
Overtime	Select Yes or No to indicate if the Agency/Office pays overtime.
*Overtime after	Enter the number of hours required before Overtime rates apply. ***Note:*** *This field can only be edited by the [HHAX Support Team](#) once set.*
Minimum Hours for Daily	Indicate the minimum number of hours required for a *Daily* Visit.

Field	Description
Overtime Rate	Use these fields to select the Pay Code for Overtime rates. ***Note:*** *This field can only be edited by the [HHAX Support Team](#) once set.*
Calculate Overtime for Prior Week	Select to calculate overtime worked during the prior week.
Allow more than one Payroll batch per Caregiver per Payroll Period	Select this checkbox to include a Caregiver in more than one Payroll Batch per Payroll period.
Blended OT Rate	The Blended Rate Pay Code is used for Overtime Hours for Visits on or after the listed date. If the Blended Rate is selected, then the system calculates the averaged based on the hourly Pay Rates.
Payroll Hourly Equivalent for Live-In Shifts	Use this field to define an hourly equivalent for Live-In Shifts.
Payroll Week-Ending Day	Select the day of the week to run Payroll. ***Note:*** *This field can only be enabled by the [HHAX Support Team](#).*
Display Patient Name on Stub	Select for the Patient Name to be included on the stub.
Allow Payroll Creation on any Week-Ending Day	Select to indicate if the Agency can run Payroll on any day of the week. ***Note:*** *This functionality can only be enabled/disabled by the [HHAX Support Team](#).*
Pay Travel Time to the Minute	Travel Time duration is rounded to the nearest 15 minutes by default. Select this checkbox for the system to calculate to minute and the time between Visits are based on the confirmed End Time of the first Visit and the confirmed Start Time of the second Visit.

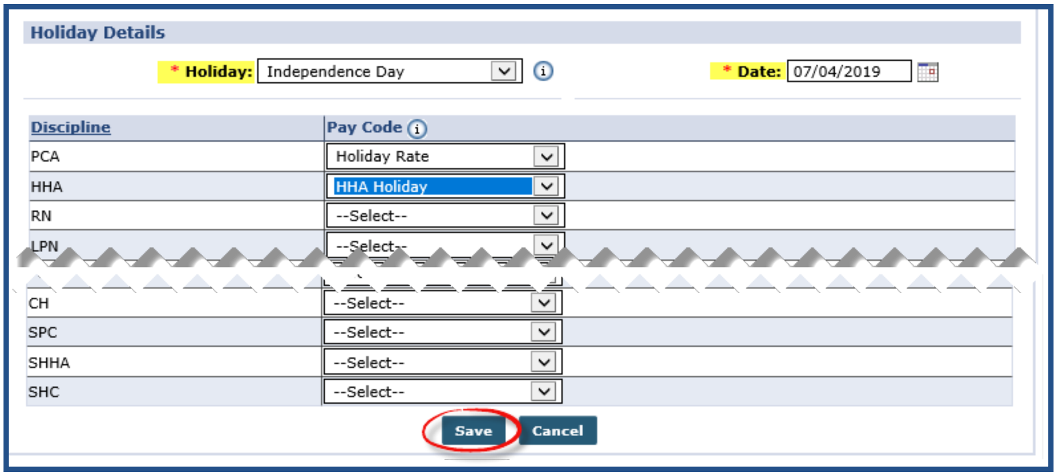
Payroll Holiday Setup

Use the **Payroll Holiday Setup** section to link Holidays to Pay Rates. Click the ***Search*** button to search for existing *Holiday Pay Rates*. Click the ***New*** button to create a new rate or click on the edit icon to edit (as seen in the image below).



Payroll Holiday Setup

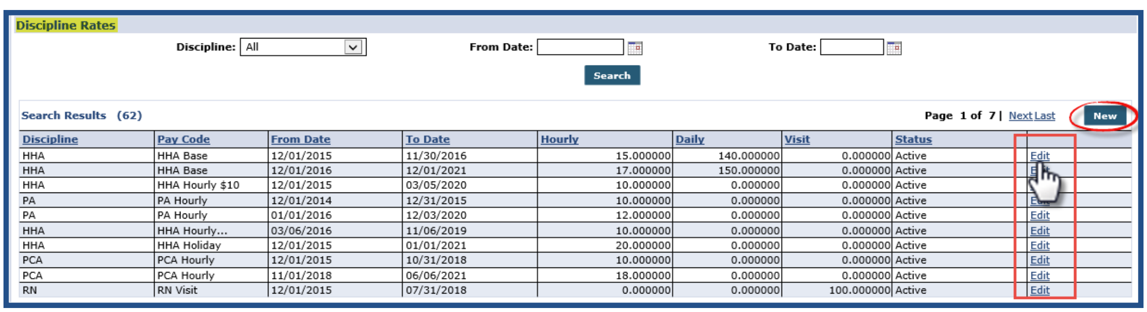
The *Holiday Details* window opens. Select the **Holiday** from the dropdown (created via the Reference Table Management function) and select the holiday **Date** (required) fields. Select the applicable **Discipline(s)** and select the associated **Pay Code** for each, as seen in the following image. Click ***Save*** to finalize.



New Holiday Rate

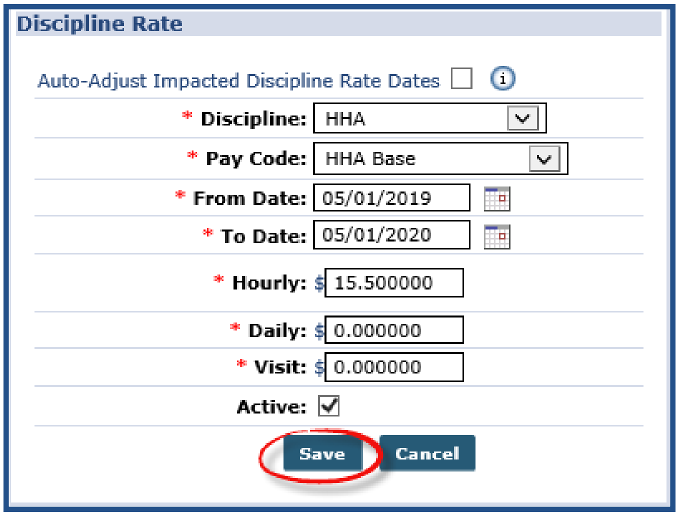
Discipline Rates

Use the **Discipline Rates** section to set rates for the **Pay Codes** created in the Reference Table. Click the ***New*** button to create a new Discipline Rate or click on the **Edit** link to edit (as seen in the image below).



Payroll: Discipline Rates

When creating a *Discipline Rate*, complete the required fields as seen in the following image and described in the table below.



Discipline Rate Window

Field	Description
*Discipline	Select the *Skilled* or *Non-Skilled* discipline attached to the rate.
*Pay Code	Select the rate as setup on the Reference Table.
*From/To Date	Select the effective date range for the rate.
*Hourly/Daily/Visit	Enter the dollar amount of the rate in respective fields.
Active	Only *Active* Discipline Rates can be used.

Refer to the Billing category for full details on Universal Billing Codes to include *Weekend and Holiday Codes* as well as *Holiday Templates*.

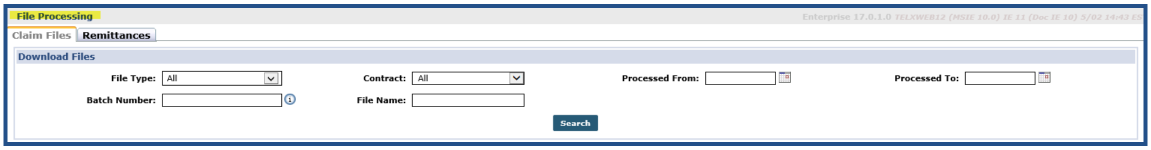
Agency Profile

The **Agency Profile** is used to capture an Agency's general information and internal structure as well as to set up a variety of functions and restrictions within the system.

Refer to the Admin Agency Profile topic for complete details and functionality.

File Processing

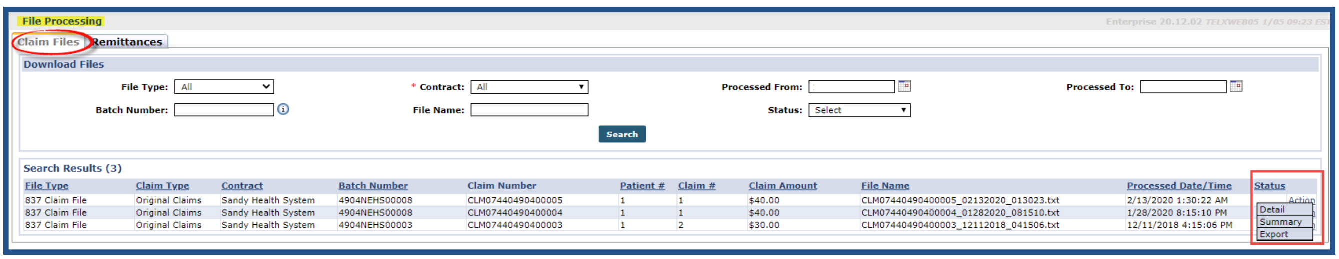
The **File Processing** function is used to manage Linked-Contract billing. The File Processing page consists of two tabs (**Claim Files** and **Remittances**) to view the interchange of what is billed and what is received by an Agency. Both tabs include search filters to narrow searches to a particular **File Type**, **Contract**, **Batch Number**, **File Name**, and **Processing date ranges**.



File Processing Search Filters

Claim Files

The **Claim Files** tab captures all invoices, or claims, processed for Linked-Contracts. Search results appear under the search filters. These claim files can be viewed (**Detail** and **Summary** links) and extracted from HHAX using the **Export** link under the Status column as seen in the following image.



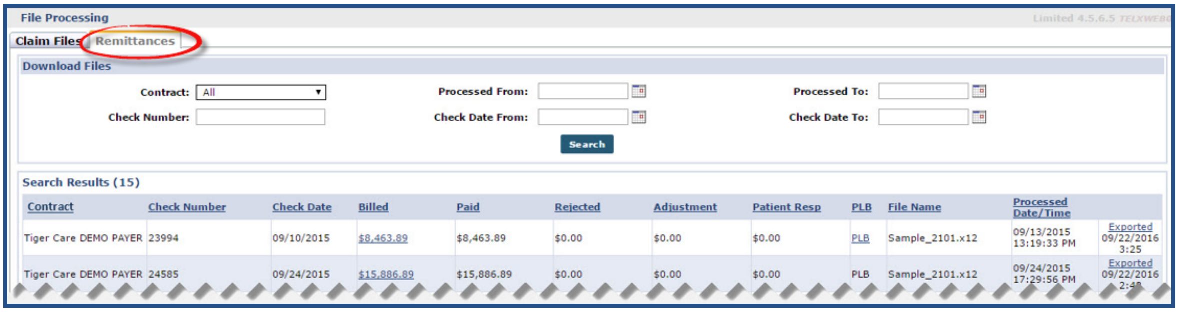
File Processing Page: Claim Files

The following table describes the information per Claim File record in the results.

Column	Description (Displays)
File Type	Type of Claim File
Claim Type	Type of claim such as Original, Adjusted, or Void.
Contract	The Billed Contract
Invoice Batch	The Invoice Batch Number assigned by the HHAX system.
Claim Number	The Claim Number assigned by the HHAX system.
Patient #	The number of Patient cases billed in the claim.
Claim #	The number of claims within the file.
Claim Amount	The billed amount
File Name	The Claim File name
Processed Date/Time	The date and time the claim was generated in HHAX.

Remittances

The **Remittances** tab maintains a record of all **835 Remittance Files** received by the Agency. Search results appear under the search filters. The *Remittance* files can be extracted from HHAX using the **Exported** link (in the right-most column).



File Processing Page: Remittances

The following table describes the information per Remittance record in the results.

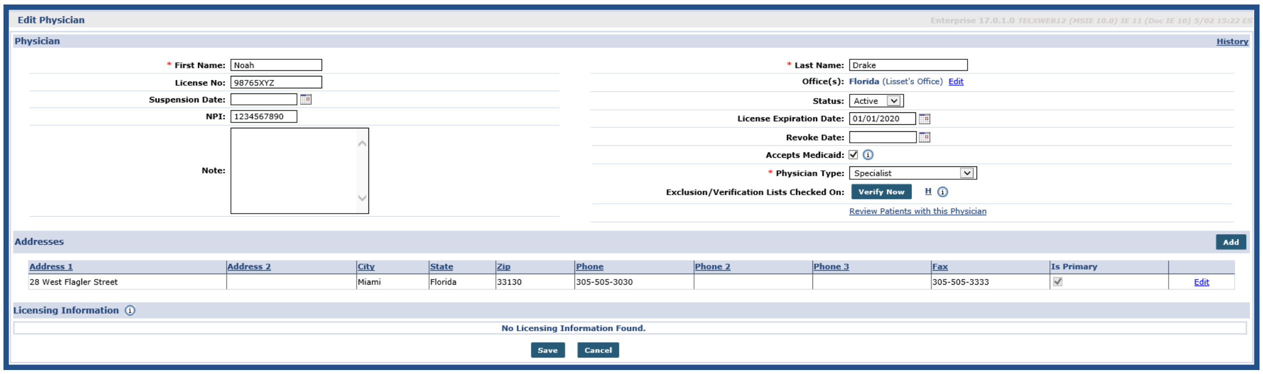
Column	Description (Displays)
Contract	The Contract associated with the 835 file.
Check Number	The check number associated with the 835 file.
Check Date	The date the check was issued.
Billed	The amount billed in the 837 Claim File.
Paid	The amount paid in the 835 Remittance File.
Rejected	Any visits or items included in an 837 Claim file which were not paid.
Adjustment	Any visits or items included in an 837 Claim file which were only partially paid.
Patient Resp	The amount the Patient is responsible for paying (if applicable).
PLB	The Provider Level Adjustment is a secondary adjustment that can either decrease or increase the payment. Multiple adjustments may be captured by a single PLB.
File Name	The 835 file name.
Processed Date/Time	The date and time the file was processed in HHAX.

Physician Setup

The **Physician Setup** function allows Agencies to create and maintain profiles within the HHAX system for Doctors working with a serviced Patient.

New/Edit Physician

Use the **New/Edit Physician** page to enter a Doctor's personal and medical information. The table below the image describes the fields included in this page.



New/Edit Physician

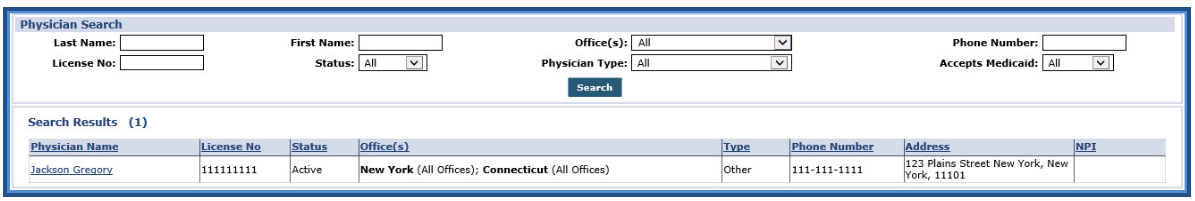
Field	Description (Displays)
*First/Last Name	(Required) The Physician's first and last name.
License No.	The Physician's professional license number.
Office	Use the **Edit** link to associate the Physician with an Office.
Suspension Date	Indicate a suspension date, if applicable.
Status	Select *Active* or *Inactive*.
NPI	The Physician's *National Provider Identifier* number.
License Expiration Date	Indicate the date when the Physician's license expires.
Note	Enter relevant Notes concerning the Physician.
Revoke Date	Indicate a revoke date, if applicable.
Accepts Medicaid	Select this checkbox if the Physician accepts Medicaid Patients.
*Physician Type	(Required) Select the Physician's Specialty/Type of Practice. Values are created via the Reference Table Management functionality.
Exclusion/Verification Lists Checked On	Click the **Verify Now** button to run a search through various databases (such as OMIG, OIG, and GSA) to ensure the Physician is not on any exclusion list. ***Note:*** *This feature is cost-related and there is a charge to the Agency for Exclusion Lists checks. Contact the HHAX Support Team for questions concerning price and*

Field	Description (Displays)
	billing.

In the *Addresses* section, click the ***Add*** button to enter the Physician's work address(es). Click the **Edit** link on an existing address to update.

Physician Search

Use the **Physician Search** function to search for Physicians entered in the system by entering/selecting search filters or click on ***Search*** button for a full list. Click on the **Physician Name** (link) to access the Physician's Profile (*Edit Physician* page).



Physician Search

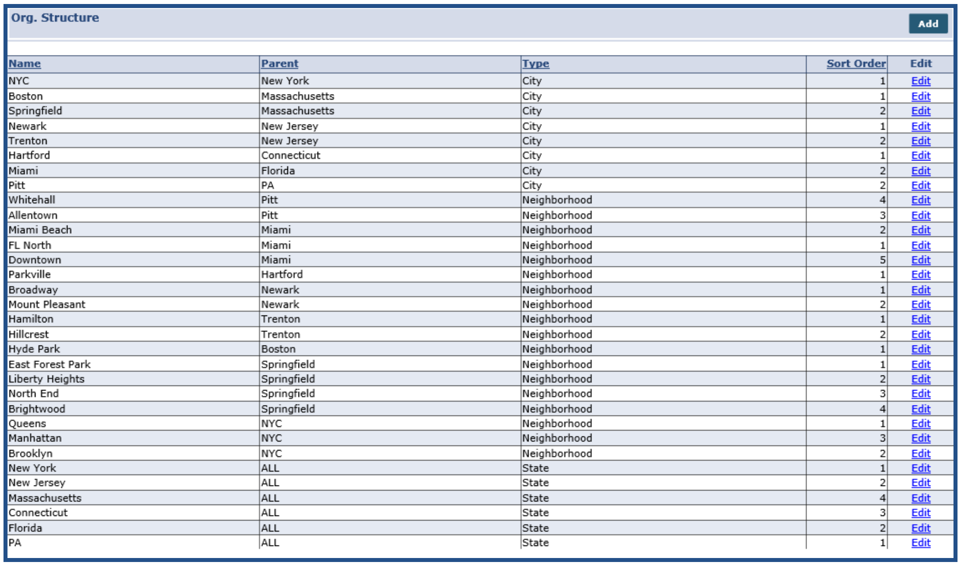
Office Setup

Use the **Office Setup** page to configure individual Offices within an Agency. Every Agency must have at least one Office.

Refer to the Admin Office Setup topic for complete details and functionality.

Org. Structure

Use the **Org. Structure** page to add new values to the Organization Structure created during implementation. Click the ***Add*** button to add values or click the **Edit** link to update an existing one.

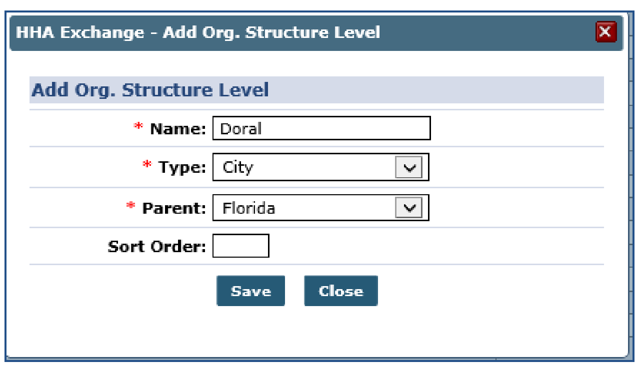


Org. Structure Add

Name	Parent	Type	Sort Order	Edit
NYC	New York	City	1	Edit
Boston	Massachusetts	City	1	Edit
Springfield	Massachusetts	City	2	Edit
Newark	New Jersey	City	1	Edit
Trenton	New Jersey	City	2	Edit
Hartford	Connecticut	City	1	Edit
Miami	Florida	City	2	Edit
Pitt	PA	City	2	Edit
Whitehall	Pitt	Neighborhood	4	Edit
Allentown	Pitt	Neighborhood	3	Edit
Miami Beach	Miami	Neighborhood	2	Edit
FL North	Miami	Neighborhood	1	Edit
Downtown	Miami	Neighborhood	5	Edit
Parkville	Hartford	Neighborhood	1	Edit
Broadway	Newark	Neighborhood	1	Edit
Mount Pleasant	Newark	Neighborhood	2	Edit
Hamilton	Trenton	Neighborhood	1	Edit
Hillcrest	Trenton	Neighborhood	2	Edit
Hyde Park	Boston	Neighborhood	1	Edit
East Forest Park	Springfield	Neighborhood	1	Edit
Liberty Heights	Springfield	Neighborhood	2	Edit
North End	Springfield	Neighborhood	3	Edit
Brightwood	Springfield	Neighborhood	4	Edit
Queens	NYC	Neighborhood	1	Edit
Manhattan	NYC	Neighborhood	3	Edit
Brooklyn	NYC	Neighborhood	2	Edit
New York	ALL	State	1	Edit
New Jersey	ALL	State	2	Edit
Massachusetts	ALL	State	4	Edit
Connecticut	ALL	State	3	Edit
Florida	ALL	State	2	Edit
PA	ALL	State	1	Edit

Org. Structure Page

On the *Add Org. Structure Level* window, complete the required fields (as described in the table underneath below). Click ***Save*** to update.



Add Level

Field	Description
*Name	(Required) Enter the value name.
*Type	(Required) Select the type: *City*, *State*, or *Neighborhood*
*Parent	(Required) Select the Parent value.

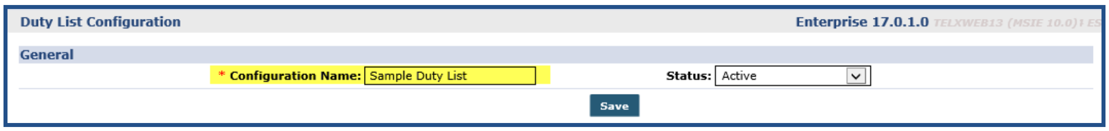
Field	Description
Sort Order	Designate an order of appearance if other values exist under the **Parent**.

Duty List Setup

Use the **Duty List Setup** page to manage Plan of Care (POC) Duties.

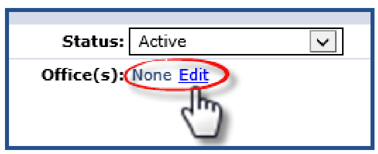
Creating a New Duty List

To create a new Duty List, click on the New button to open the Duty List Configuration page. Enter a **Configuration Name** in the field and select *Active* in the **Status** field. Click ***Save***.



New Duty List

Once saved, the **Office(s)** field appears (under the **Status** field). Click the **Edit** link to assign Offices to the newly created Duty List.

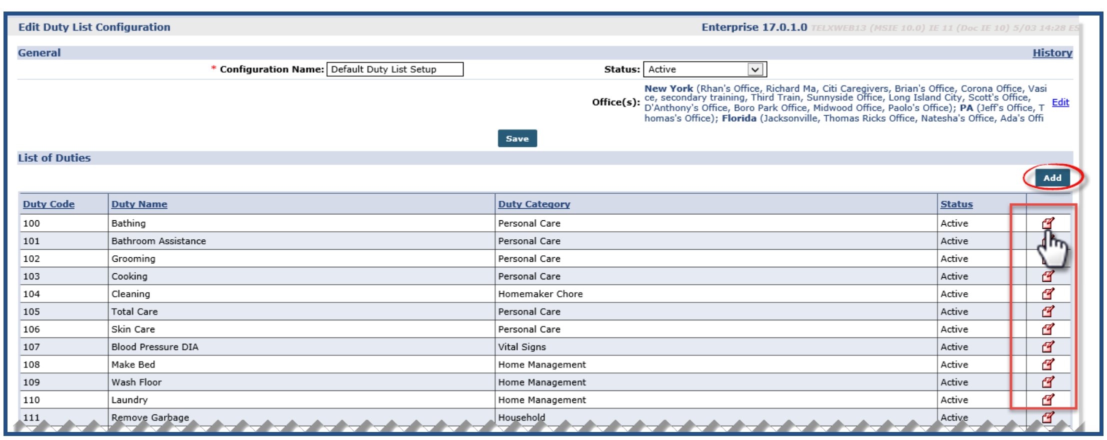


Assign Offices

Existing Duty List

To access an existing Duty List, click the ***Search*** button to locate the applicable Duty List and click on the **Duty List Setup Name** (link) from the Search Results.

Once selected, the *Edit Duty List Configuration* page opens. Click the ***Add*** button to add a new Duty or click on the edit icon to update an existing one.

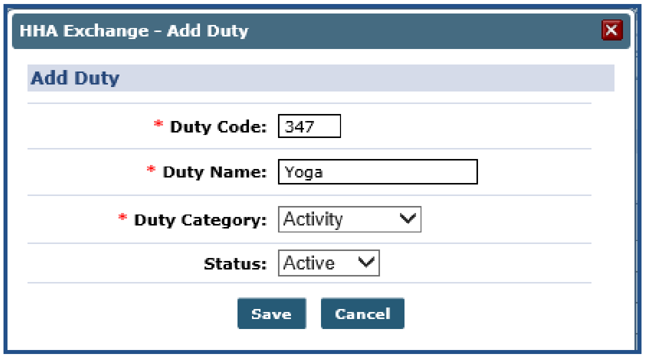


Duty Code	Duty Name	Duty Category	Status
100	Bathing	Personal Care	Active
101	Bathroom Assistance	Personal Care	Active
102	Grooming	Personal Care	Active
103	Cooking	Personal Care	Active
104	Cleaning	Homemaker Chore	Active
105	Total Care	Personal Care	Active
106	Skin Care	Personal Care	Active
107	Blood Pressure DIA	Vital Signs	Active
108	Make Bed	Home Management	Active
109	Wash Floor	Home Management	Active
110	Laundry	Home Management	Active
111	Remove Garbage	Household	Active

Duty List Setup

On the *Add Duty* window, complete the required fields (denoted with a red asterisk), as follows:

- ***Duty Code:** Enter a 3-digit code the Caregiver enters to register duty.
- ***Duty Name:** Enter the name of the duty.
- *** Duty Category:** Select the duty category.
- **Status:** Select *Active* or *Inactive*

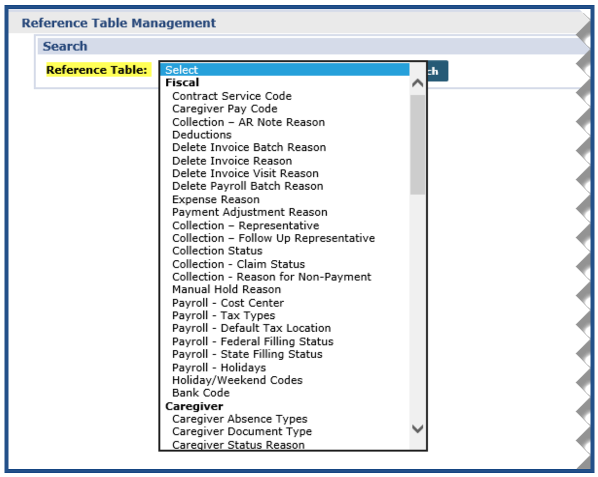


Add Duty

Reference Table Management

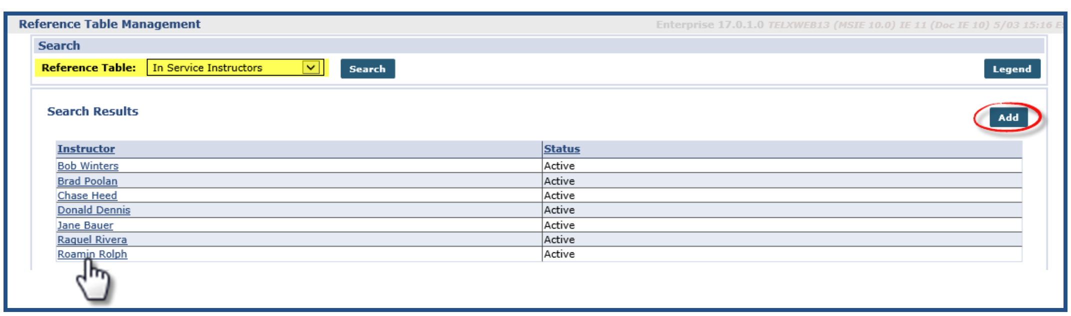
The **Reference Table Management** function is one of the most widely-used features across the HHAX system. Multiple fields throughout the application are fed by the unique values created via Reference Tables (at the Agency level).

Numerous tables exist allowing users to create and update values. The fields required to create new values for each available field in the **Reference Table** dropdown may vary from item to item. Values created using this function are labeled as **Agency Default** on the Office Level Reference Table.



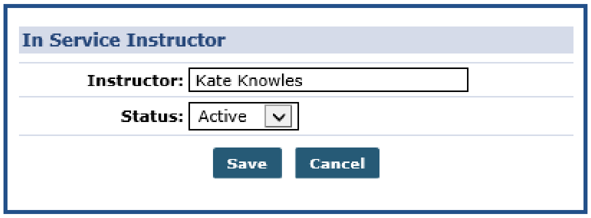
Reference Table Management

Creating and managing values is in the Reference Tables is standard in the system. Begin by searching for the applicable Reference Table (as seen in the image above). For example, the *In Service Instructors* table is selected (as illustrated below). Click on the ***Add*** button to add a value to the selected Reference Table or click on an existing value (**link**) to update.



Reference Table: In Service Instructors

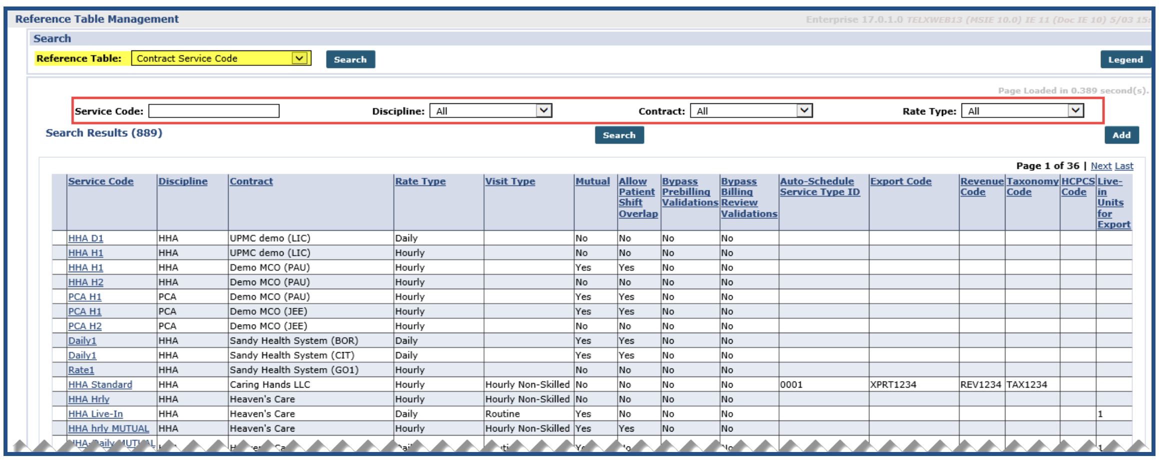
In this example, a new **In Service Instructor** is added. Clicking the ***Add*** button opens the *In Service Instructor* window. Enter the **Instructor** (name) and ensure the **Status** is *Active*. Click ***Save***.



Adding In Service Instructor

Note: *For this example, the same mechanism applies when editing a value. The* ***Instructor*** *name can change as well as the* ***Status*** *can be changed from Active to Inactive.*

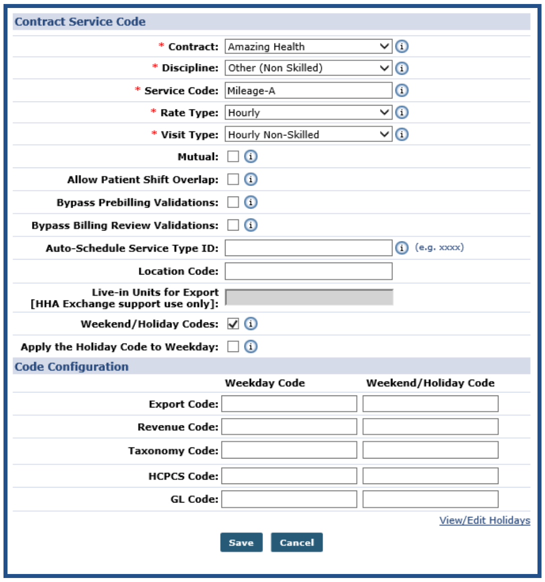
Some Reference Tables are comprehensive requiring more information. Upon accessing the Reference Table, the fields display as column items on the core page (as illustrated in the image below for the *Contract Service Code* **Reference Table**). In addition, these search filters can facilitate specific searches.



Service Code	Discipline	Contract	Rate Type	Visit Type	Mutual	Allow Patient Shift Overlap	Bypass Prebilling Validations	Bypass Billing Review Validations	Auto-Schedule Service Type ID	Export Code	Revenue Code	Taxonomy Code	HCPCS Code	Live-in Units for Export
HHA D1	HHA	UPMC demo (LIC)	Daily		No	No	No	No						
HHA H1	HHA	UPMC demo (LIC)	Hourly		No	No	No	No						
HHA H1	HHA	Demo MCO (PAU)	Hourly		Yes	Yes	No	No						
HHA H2	HHA	Demo MCO (PAU)	Hourly		No	No	No	No						
PCA H1	PCA	Demo MCO (PAU)	Hourly		Yes	Yes	No	No						
PCA H1	PCA	Demo MCO (JEE)	Hourly		Yes	Yes	No	No						
PCA H2	PCA	Demo MCO (JEE)	Hourly		No	No	No	No						
Daily1	HHA	Sandy Health System (BOR)	Daily		Yes	Yes	No	No						
Daily1	HHA	Sandy Health System (CIT)	Daily		Yes	Yes	No	No						
Rate1	HHA	Sandy Health System (GO1)	Hourly		No	No	No	No						
HHA Standard	HHA	Caring Hands LLC	Hourly	Hourly Non-Skilled	No	No	No	No	0001	XPRT1234	REV1234	TAX1234		
HHA Hrly	HHA	Heaven's Care	Hourly	Hourly Non-Skilled	No	No	No	No						
HHA Live-In	HHA	Heaven's Care	Daily	Routine	Yes	No	No	No						1
HHA hrly MUTUAL	HHA	Heaven's Care	Hourly	Hourly Non-Skilled	Yes	Yes	No	No						

Reference Table: Contract Service Code

In this example, adding a new value requires more information as seen in the image below (including required fields denoted with red asterisk). Once created, the field information entered in the window are seen in the respective columns (image above).



Contract Service Code Window

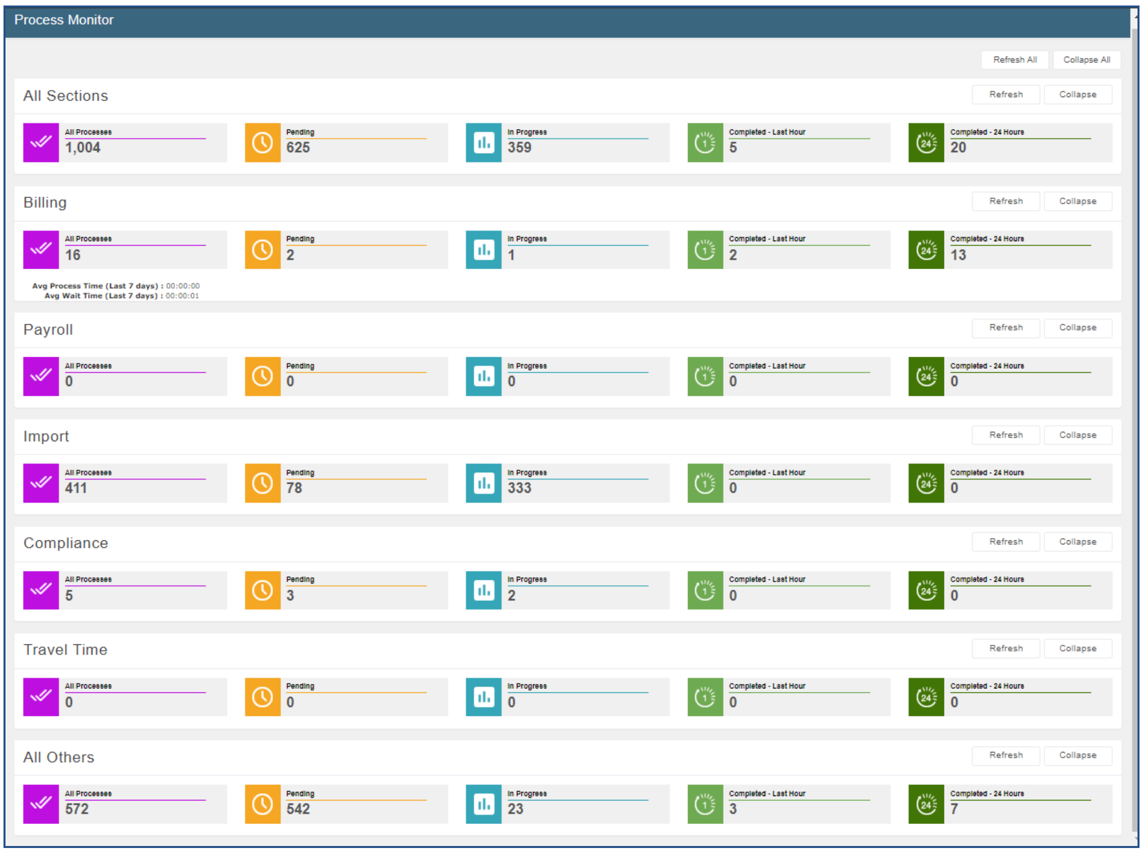
Note: *The most used Reference Tables include* ***Service Codes****,* ***Export Codes****, and* ***Pay Codes****. Ensure to check those topics for details and instructions.*

Process Monitor

The *Process Monitor* (***Admin > Process Monitor***) page offers real-time, updated data via a streamlined look segmenting the various processes into categories to include *All Sections*, *Billing*, *Payroll*, *Import*, *Compliance*, *Travel Time*, and *All Others*.

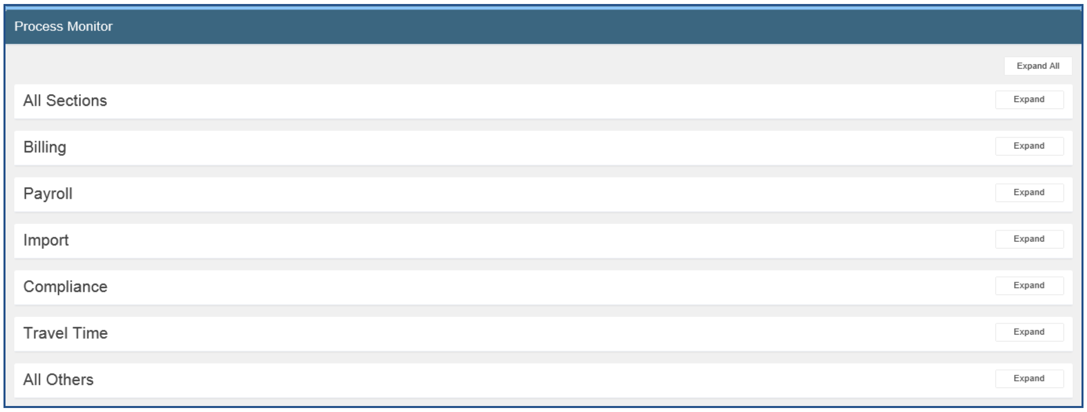
Each category provides Status indicators to indicate the number of current processes that are *Pending*, *In Progress*, *Completed in the Last Hour*, and *Completed in the Last 24 Hours*. All categories are preceded by a total number of current processes (*All Processes*) and each status is refreshed individually.

All sections can be expanded and refreshed. The following image illustrates all categories in the expanded mode.



Process Monitor Page

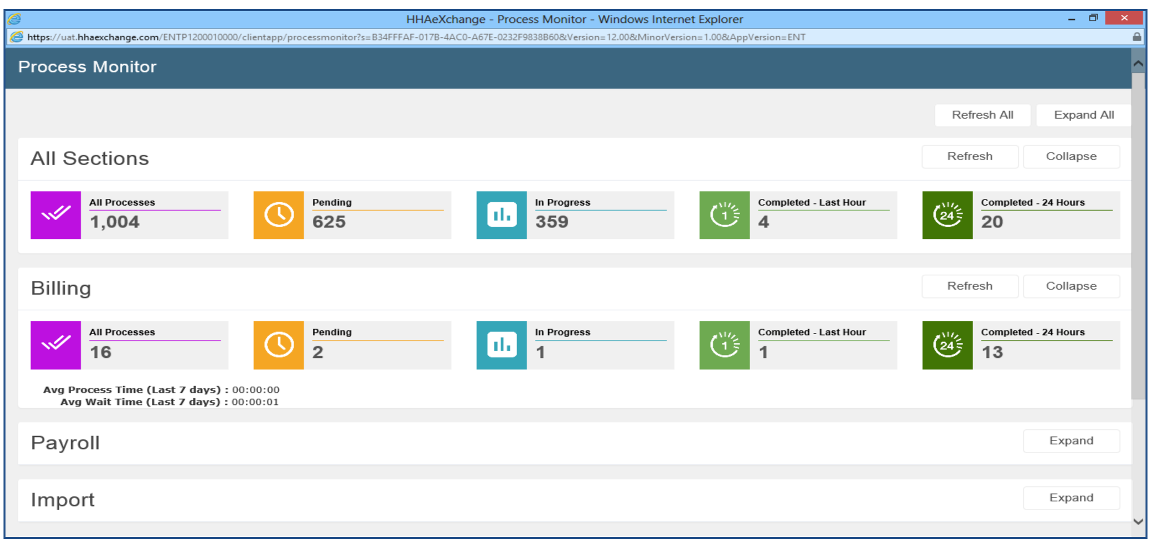
Each category can be expanded (as seen above) or collapsed (as illustrated in the image below). When categories are collapsed, the ***Refresh*** button disappears and the information stops refreshing or auto-synching.



Process Monitor – Collapsed Mode

When categories or sections are expanded, the ***Refresh*** button becomes available and data is automatically refreshed every 10 seconds. Data can be refreshed individually by clicking on the ***Refresh*** button at any time. The image below shows the Billing section expanded.

The *Billing* section provides details such as the **Average Process Time** (in the Last 7 days) which shows the average process start and end time and the **Average Wait Time** (in the Last 7 days) which shows the average time from the time requested to the process start time.

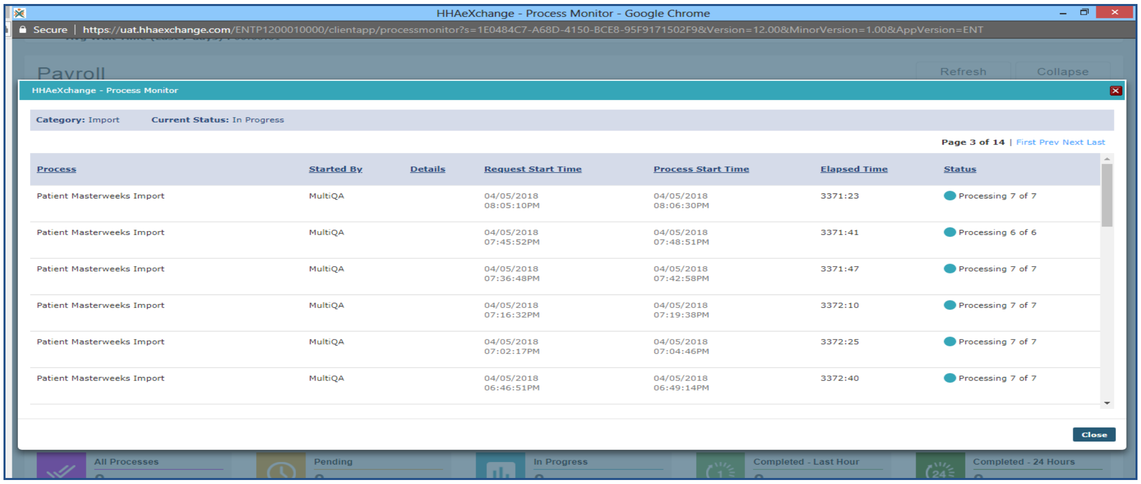


Expanded Billing Section

Note: *The **Average Process Time** and the **Average Wait Time** is only available in the Billing section.*

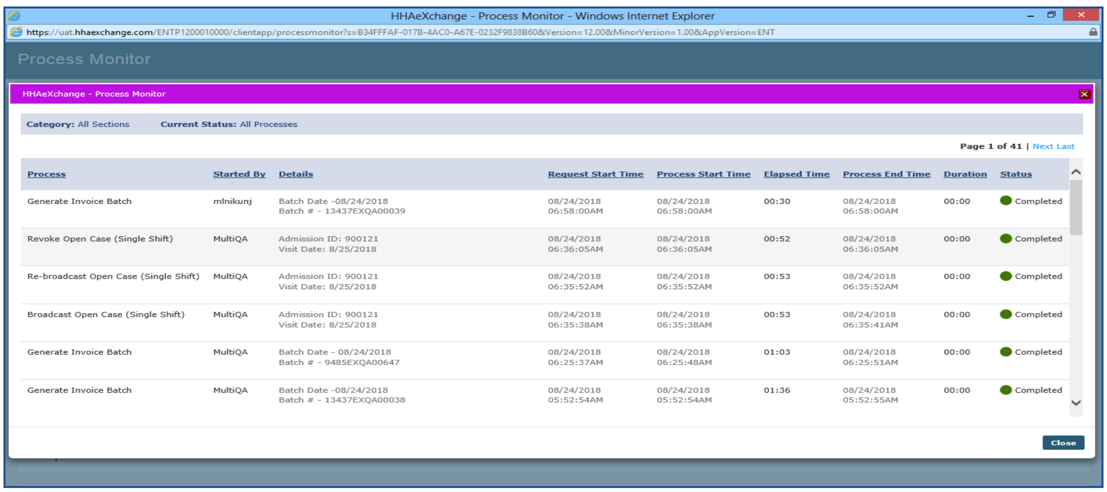
Clicking on a Status indicator opens the respective category providing details such as the current process status. A pop-up window populates displaying the current processes in a grid (as seen in the following image). These records also refresh every 10 seconds.

Note: *Auto-refresh stops on the main page if a category pop-up is open.*



Process Details for a Category

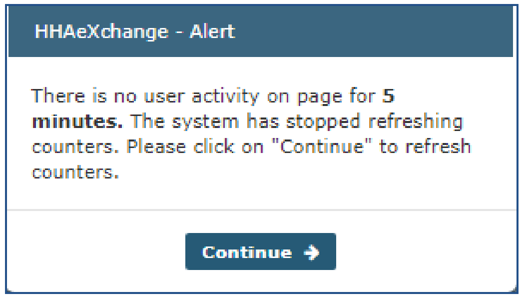
The following image illustrates Completed processes for All Sections.



Process Monitor – Completed Processes for All Sections

Page Idle Alert

While on the *Process Monitor* page, if a user is idle for more than 5 minutes, the system stops refreshing the information and a pop-up displays asking to continue (as seen in the following image). Click ***Continue*** for the system to continue refreshing records.



Page Idle Alert

Workflow Management

Tip: You can press **Ctrl-F** on your keyboard to search this topic.

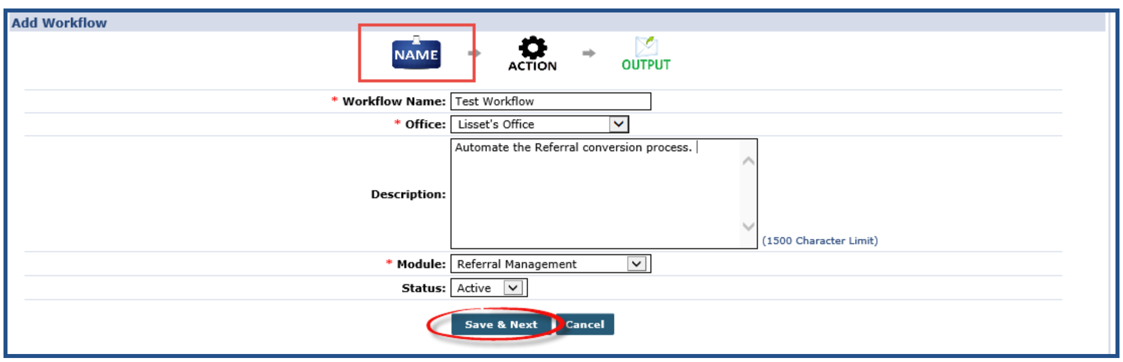
The **Workflow Management** function is used to create a workflow, or an automated process consisting of an initial triggering action or a series of actions and an Output. Once a workflow is created, the process runs automatically each time the initial action specified in the workflow is met.

For example, an Agency creates a workflow so that the system automatically generates and sends an email to the Intake Manager (***Output***) when a Referral Profile Status is edited (***Action***).

Creating a new Workflow consists of three phases: **Naming the Workflow**, **Applying Action**, and **Defining the Output**.

Phase 1 - Naming the Workflow

The first step involves creating a **Workflow Name** and applying/defining the Module to which the Workflow is activated for. Complete the required fields (described in the table below the image).



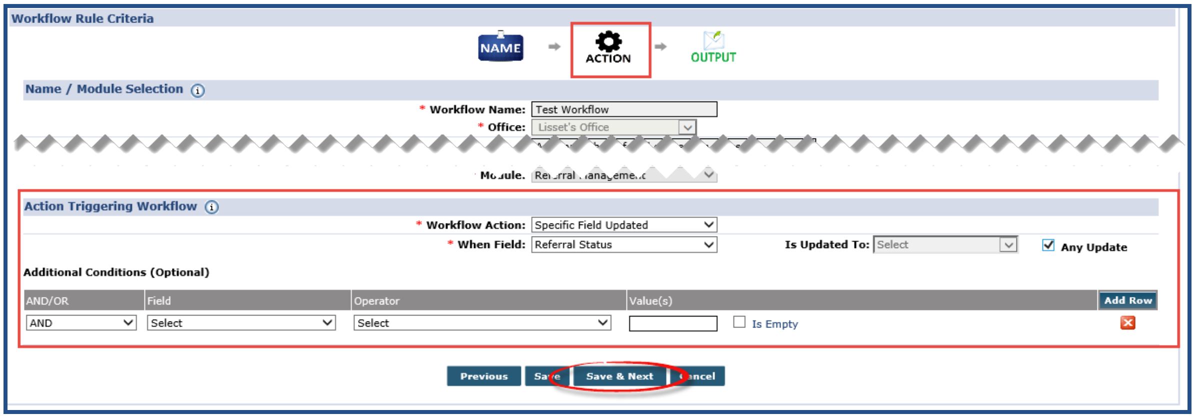
Workflow Name

Field	Description
*Workflow Name	(Required) Enter the Workflow Name.
*Office	(Required) Select the Office the Workflow is to apply to.
Description	Enter a description for the Workflow.
*Module	(Required) Select the module to apply the new Workflow to.

Note: The triggering actions available in the next section are dependent on the module selected.

Phase 2 – Defining the Action

The second phase involves defining the triggering Action of the Workflow, as illustrated in the following image. Refer to the field descriptions in the table below.



Action Triggering Workflow

Field	Description
***Workflow Action**	(Required) Select the Action triggering the Workflow. The options provided depend on the Module selected in the previous step. ***Note:** Some Actions require additional information or further specification and the following fields appear.*
***When Field**	(Required) Define this field if a triggering Action occurs when a field is updated.
***Is Updated To**	(Required) Unless the **Any Update** checkbox is selected (to the right), this field is required. Define if a specific value within that field is the triggering Action.

***Note:** The additional fields generated by the value selected in the **Workflow Action** dropdown may vary from value to value.*

Additional Conditions

If the action triggering the Workflow requires further refinement, then Additional Conditions are applied, described as follows:

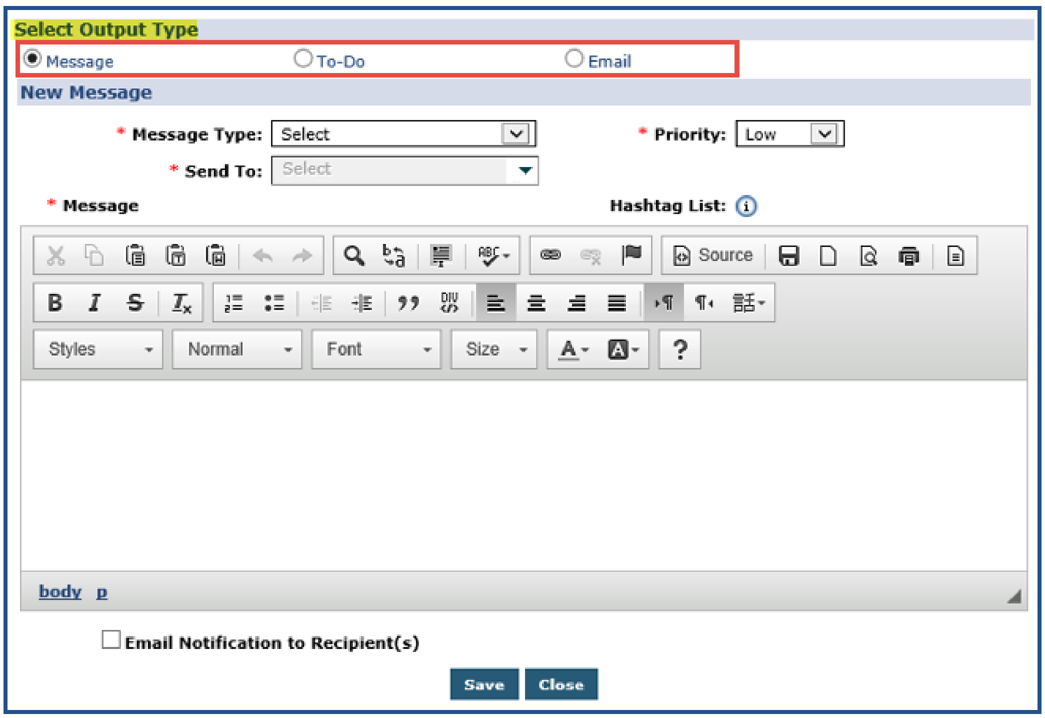
Field	Description
AND/OR	Selecting *And* to require both the workflow action that was specified and the selected field to occur. Select *Or* to require either variable be selected.
Field	Select the field that triggers the additional condition.
Operator	Select the operator that defines the relationship between the condition established and the value that is entered in the next field.

Field	Description
Value(s)	The variable that is entered to explicitly define the condition.

Phase 3 – Defining the Output

The third and final phase involves defining the **Output**, which may be a *Message*, a *To-Do*, or an *Email*, as seen in the following image and described in the tables below.

Note: *Multiple Outputs may be added to a Workflow.*



Select Output Type

Message – Sent to internal Agency Users

Select	Description
*Message Type	(Required) Select who receives the message: • *All*: All Agency users receive the message. • *Private*: Only selected users receive the message. • *Role*: Only selected roles receive the message
*Send To	(Required) If *Private* or *Role* is selected for the **Message Type**, define which users or roles, respectively, receive the message.

***Priority**	(Required) Define the priority of the message.
***Message**	(Required) Enter the message to send.

To-Do – Sent to the To-Do section of the Home Module

Select	Description
To	Select who receives the message: • *User*: Only selected users receive the message. • *Role*: Only selected roles receive the message.
Assign To	Define which users or roles receive the message.
***Priority**	(Required) Define the priority of the message.
***Due**	(Required) Enter the number of days after the workflow action has taken place for an assigned user/role to complete the task(s).
***Description**	(Required) Describe the task(s).

Email – Sent to every address entered

Select	Description
***To**	(Required) Enter the email addresses of all relevant parties.
CC	Enter the email addresses of any parties copied on the message.
BCC	Enter the email addresses of any parties blind-copied on the message.
***Subject**	(Required) Enter the subject of the email
***Message**	(Required) Enter the email message.

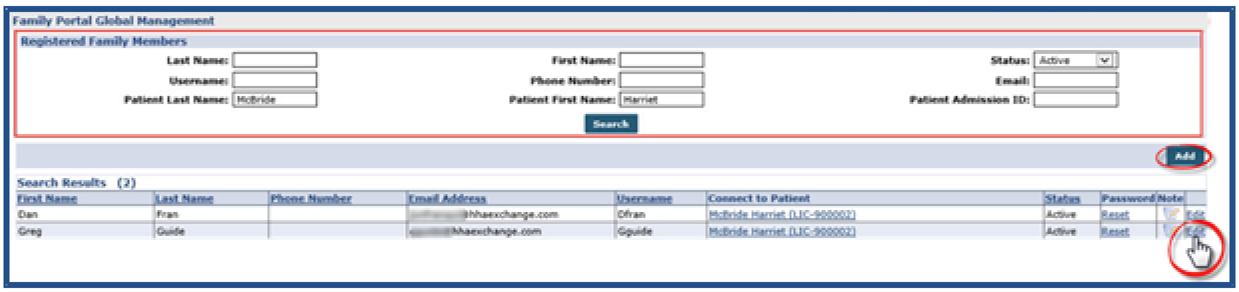
Family Portal Global Management

Tip: You can press **Ctrl-F** on your keyboard to search this topic.

Family Portal Global Management function is used to setup user accounts for family members, broad-cast notifications, and review activity in the Family Portal.

Registered Family Members

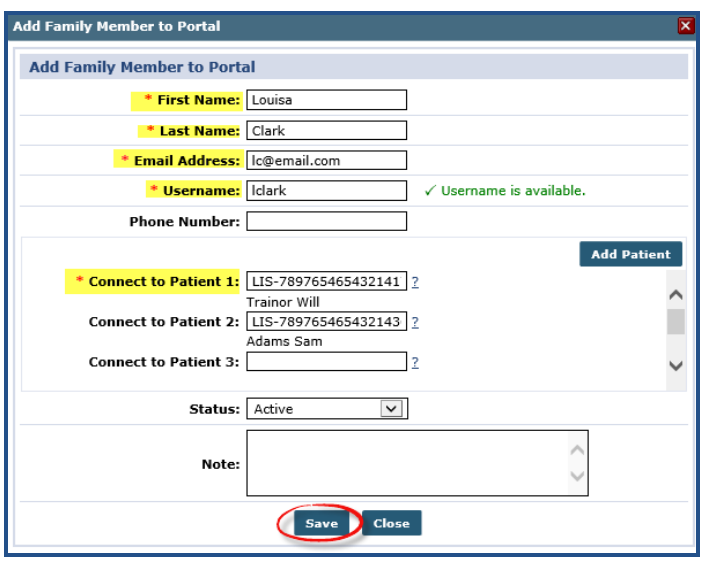
Use the **Registered Family Members** page to enter new family members and search for existing ones. To Add a member, click the ***Add*** button or click on the **Edit** link to update an existing member. Use the search filters to locate an existing member (as seen in the image below).



Registered Family Members

Adding a New Family Member to the Portal

In the *Add Family Member to Portal* window, complete the required fields for the new Family Member (denoted with a red asterisk), as seen in the image and described in the table below. Click ***Save***.

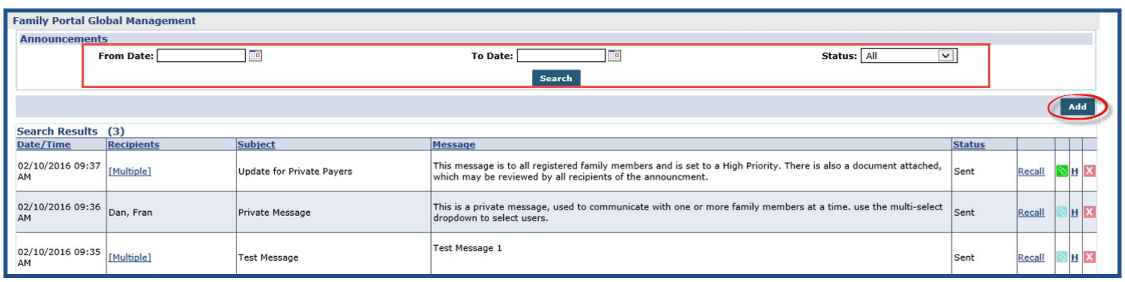


Adding Family Member

Field	Description
*First/Last Name	(Required) Enter the First and Last Name in respective fields.
*Email Address	(Required) Enter the provided email address.
*Username	(Required) Enter a unique user name. The system alerts of username availability.
Phone Number	Enter a contact phone number.
*Connect to Patient 1	(Required) Connect the family member to a Patient. A single family member can be connected to as many Patients as necessary.
Status	Select *Active* to activate.
Note	Enter notes if/as needed.

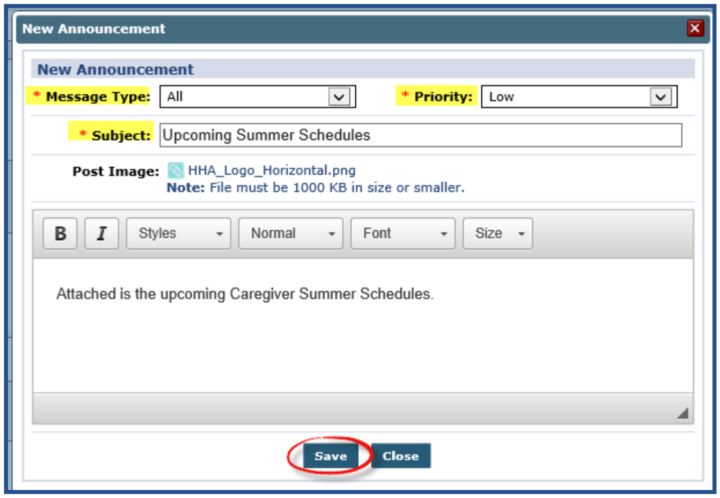
Announcements

The **Announcements** section is used to review past announcements and send new ones. Use the search filters to locate a past announcement or click on the ***Add*** button to create a new one.



Family Portal: Announcements Page

In the *New Announcement* window, complete the required fields (denoted with a red asterisk), as seen in the image and described in the table below. Click ***Save*** to send.

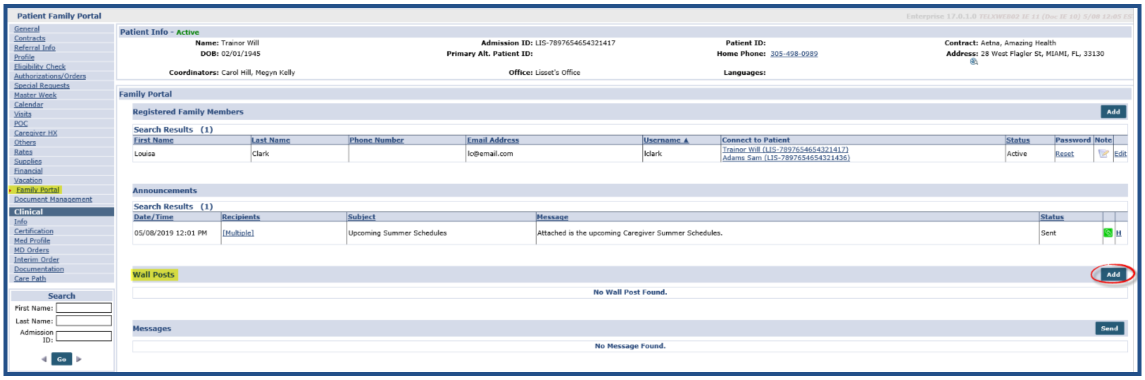


New Announcement

Field	Description
*Message Type	(Required) Select All to send all registered family members or select Private to send to an individual.
*Sent To	.(Required) When sending a *Private* message, use this multi-select drop-down to select specific family members.
*Priority	(Required) Select *Low*, *Medium*, or *High* to indicate priority level.
*Subject	(Required) Enter the Announcement subject.
Post Image	Click the paperclip icon to attach a document to the message.
Note	Enter the actual message in the free text window.

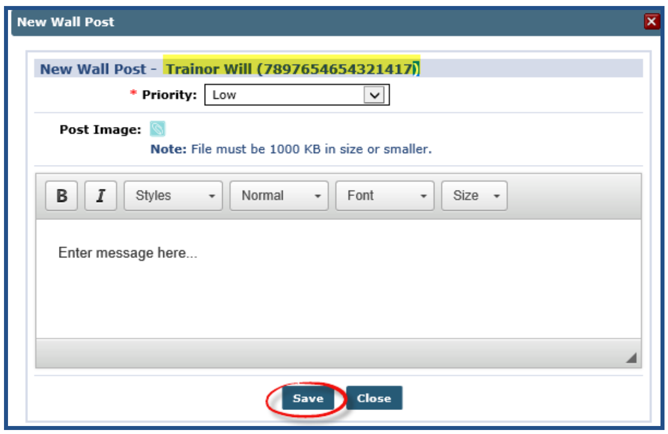
Wall Posts

Use the **Wall Posts** page to review any wall posts made by Family Members or Agency Users. To create a new wall post, navigate to ***Patient > Family Portal*** and click on the Add button in the Wall Posts section (as illustrated in the image below).



Patient Family Portal: Wall Posts

In the *New Wall Post* window, the Patient's Name and ID appear on the top bar. Select the **Priority** level (*Low*, *Medium*, or *High*). Enter the message in the free text window and click ***Save*** to post.



Initiate Processing

DISCLAIMER

The Initiate Processing feature is activated by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

The **Initiate Processing** function allows users to manually trigger processes that are normally run automatically overnight. This functionality does not replace the automated process performed each night; it simply provides a secondary means of activation.

Initiate Processing

Processes

Process Name	Last Executed	User	Duration	Action
Add Missing Disciplines (Payroll pre-process)				* Office(s): All · Run Now
Overlap Rounding Process	12/15/2015 07:01	vendor1	00:00:15	* Office(s): All · Run Now
Update Default Pay Codes (Payroll pre-process)				* Office(s): All · Run Now

Initiate Processing Page

An **Office(s)** must be selected prior to initiating a process. Once a process is completed, the page displays the following information:

- **Last Executed:** The date and time the process was last executed.
- **User:** The user who triggered the process
- **Duration:** How long the process took to complete.

Note: *Running these processes during business hours may result in reduced system performance.*

Caregiver Compliance

Tip: You can press **Ctrl-F** on your keyboard to search this topic.

The Caregiver Compliance module streamlines all functionality into three applicable phases: *Item Manager*, *Compliance Setup*, and *Caregiver Compliance* page. Refer to the Caregiver Compliance category for full details and instructions.