

HAeXchange Agency Profile Process Guide Admin Functions User Guide

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Contents

Admin Agency Profile	1
Overview	1
HHAX System Key Terms and Definitions	1
General	2
Caregiver Scheduling and Availability	5
Call Exception Notification Setup	6
Secondary Verification Calls	7
Address	8
Payroll	9
Mileage Expense1	.0
Financial Reporting Setup1	.1
Agency Logo1	.2
Collection Setup1	.3
Family Portal Message Notifications1	4
Provider Self-Service Client ID for EVV API1	.5



Admin Agency Profile

Overview

The **Agency Profile** page is comprised of various sections 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.

This category covers the Agency Profile function and each sub-section.

Note: Some of the fields in the Agency Profile page can only be edited/adjusted by the HHAX Support Team.

Please direct any questions, thoughts, or concerns regarding the content herein to <u>HHAeXchange</u> <u>Customer Support</u>.

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
Caregiver	is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Dever	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is
Payer	the organization placing Patients with Providers.
ННАХ	Acronym for HHAeXchange



General

The General section is used to capture and set basic Agency information and requirements.

Agency Info	
_	
Revel	
General	Halary
*Agency Name: Northeast Homesan Services	Agency Initials: 10HS
Agency Code: (100)	Serviced 20 Codes: Enter Serviced Zin Codes
IV8 Phone #1 4+++++++++++++++++++++++++++++++++++	* Languages: SciedLianovate
Default Coordinator:	Tatal Uphaded File Usage: 0 GB Used (1.00 GB Limit) 💿
Password Expires Within: Days 💿	Yan 80 Ne.: [123456700 0
Disable NPI Validations: 0	
MPE (es.) [100771 () Prevaler ID (336): ()	Provider 20p Code: [10110] - [1111]
Account Receivable Contact:	Closing Date (Date through which books are closed): Under
tecryption Passwordt	
Devote Numbers By Contract:	HRA Agency ID:
Seek Out Detree III @	Add Caregiver Team Identifier to Billing Batch Number:
Prompt with Current Time During Time and Altendance Calls: 🔂 😳	Homepage Default Wew: Communication Stotification
* Accept Time and Atlandance Call From: Dione Phone Dione 2 Phone 3 ()	Allow Auto-Activating of Caregover Hobble Access: 🔮 🛈
Vendur Export Hyperlink; 🖽 🔕	Hole Manual Confirmations on Confirm Timesheets Page Voit start time is updated When: Voit and time is updated @
ND Onder 1CD Code Requirement: 200-12 (Martine Date V)	Haster-Week Rollever on Deleted Visits: 🗌 🛈
Validate 300 Code Selectione: 🖸 💿	Enable Automated Non-Compliance Restrictions: 🗌 🛈
Validate Transated ICD Code Selection: 💆 💿	Haintain Pay Code after Changing Carepiver on Visit: 💷 🛈
Care Innights Dashboard Default Coordinator/Norse/Assignee:	Default to Show Weekly Totals in Appointments: 👩 🛈
Copy Note To All Open Care Insights Alexts By Default: 🗌 💿	Enable Copy Note To All Open Care Insights Alerta: 🗌 🕕
Hedication Interaction Severity Types: Minur and Higher 👻 👔	Medication Interaction Screening Types 💷 🔹 🌒 🛈
Turn uff Orders and Goals Integration:	

Agency Profile: General

Field	Description
*Agency Name/Ini- tials/Code	(Required) The name, initials, and system code assigned to the Agency. These fields are set by HHAX during implementation and cannot be edited by users.
Serviced Zip Codes	Use the Enter Serviced Zip Codes link to define zip codes where service is provided.
IVR Phone #	The IVR phone number Caregivers must dial in to Clock IN and OUT of a visit. Note: This field is for review purposes only: only the <u>HHAX Support Team</u> can change an Agency's IVR number.
*Languages	(Required) Use the Select Language link to define applicable lan- guages spoken to provide services.
Default Coordinator	Select a Coordinator who is automatically assigned to every new Patient entered in the system.
Total Uploaded File Usage	This number indicates the total size of all files loaded and hosted in the HHAX system for the Agency. Once the hosting limit is reached, the system does not allow further loading. Contact the HHAX Support Team to increase file limit for the Agency.
Password Expires Within (Days)	Enter the number of days the Agency's password is valid before expir- ation.



Field	Description				
Tax ID No.	Enter the Agency's unique Tax Identification number.				
Disable NPI Validation	Select to allow entry of custom alpha-numeric values, up to 15 char- acters (from standard 10). If unselected, then alpha-numeric values are not allowed and the 10-character limit remains.				
NPI No.	Enter the Agency's specific identifier number for the NPI registry.				
Provider ID (33b)	Enter the Provider ID in this field to allow the system to automatically populate this field on the HCFA 1500 form when generating invoices in that format.				
Account Receivable Contact	Enter the name of the individual responsible for the Agency's Accounts Receivable.				
Encryption Password	When an Agency transmits a Caregiver's Profile, the system auto- matically encrypts the data due to the sensitive information contained within the file. Enter a password in this field to allow recipients to view sensitive information on a transmitted file.				
Closing Date (Date through which books are closed)	Use the Update link to set a Closing Date to prevent alterations to billing and payment data prior to the specified date. For example, if a Closing Date of 3/1/2019 is set, any billing and payment data entered into the system prior to 3/1/2019 can no longer be edited.				
Invoice Numbers by Con- tract	Select for the system to assign invoice numbers by Contract, instead of assigning the next available invoice number regardless of what Contract it is generated for. Note: This field is for review purposes only: only the <u>HHAX Support Team</u> can change an Agency's IVR number.				
HRA Agency ID	Enter the Agency's HRA ID number.				
Speak Out Duties	Speak Out Duties refers to the duty entry model where the system uses a voice recording to read off the required duties, based on the specific Patient's POC, for the visit when a Caregiver is Clocking Out. After each duty is read, the Caregiver must enter 1 for completed, 0 for incomplete, or * for refused. Note: This field is for review purposes only: only the <u>HHAX Support Team</u> can change an Agency's IVR number.				
Add Caregiver Team Iden- tifier to Billing Batch Num- ber	Select for all billing batches generated based on a Caregiver Team to be included the first two letters of the selected Team in the billing batch number. Note: This field is for review purposes only: only the <u>HHAX Support Team</u> can change an Agency's IVR number.				



Field	Description
Prompt with Current Time During Time and Attend- ance Calls	Select for Caregivers to be prompted with the current time when mak- ing a Time and Attendance Call.
Homepage Default View	Select Communication or Notification to indicate which page is the default homepage when users open the application.
*Accept Time and Attend- ance Call From	(Required) Select which phone numbers (from the Patient's Profile) are acceptable for Time and Attendance calls. Calls made from an unverified number are sent to the Call Maintenance exception page.
Allow Auto-Activating of Caregiver Mobile Access	Select to automatically re-activate Caregivers who switched from <i>Non-Active</i> to <i>Active</i> status.
Vendor Export Hyperlink	Select for the Vendor Export Hyperlink to be visible in the search results when performing a batch search.
Hide Manual Con- firmations on Confirm Timesheets Page When	Select <i>Visit Start Time is updated</i> and/or <i>Visit End Time is updated</i> for user not to see any manually adjusted times when reviewing visit information on the Confirm Timesheets page.
*MD Order ICD Code Requirement	(Required) Select the type of ICD Diagnosis Codes required and applied to Patient MD Orders (e.g., 485 Orders). The effective date is required.
Master Week Rollover on Deleted Visit	Select for the Master Week rollover to recreate deleted visits within the rollover range.
Validate ICD Code Selec- tions	Select for the system to validate the codes assigned to each Patient.
Enable Automated Non- Compliance Restrictions	Select for the system to automatically generate a "Non-Compliant" Restriction on the Caregiver's Absence/Restriction page for all dates the Caregiver is listed as "Non-Compliant" (based on the Agency's Compliance Rules). When a restriction is created, the Caregiver can- not be scheduled for any of the listed days, regardless of their current compliance status.
Maintain Pay Code after Changing Caregiver on Visit	Select for the system to maintain the Pay Code applied to a visit if the assigned Caregiver is switched. This only applies if both the original and newly assigned Caregiver are of the same Discipline. Note: This field is for review purposes only: only the <u>HHAX Support Team</u> can change an Agency's IVR number.



Caregiver Scheduling and Availability

The **Caregiver Scheduling and Availability** section allows Agencies to set a default availability for Caregivers.

Caregiver Scheduling and Availability								History
Allow Caregivers to Edit Availability via Hobile App:	20					Caregiver Hire Date Validatio	n at Time of Schedule: 🗹 🕕	
() Default Caregiver Availability:	Saturday	Sunday	Nonday	Tuesday	Wednesday	Thursday	Friday	
			Live In	Live-In	Live-In	Live-In	Live In	E.BL
() Default Hax Visits Availability:	Saturday	Sunday	Honday	Tuesday	Wednesday	Thursday	Friday	
	3	3	3	3	3	1	()	Edit

Agency Profile: Caregiver Scheduling and Availability

Field	Description
Allow Caregivers to Edit Availability via Mobile App	Select to allow Caregivers to edit their availability via the Mobile App at any time.
Caregiver Hire Date Validation at Time of Schedule	Select for the system to confirm that a visit does not fall any time prior to the Caregiver's hire date.
Default Caregiver Availability	Use the Edit link to set a default time frame for each day of the week to serve as the default hours of availability.
Default Max Visits Availability	Use the Edit link to specify a specific amount of visits a Caregiver may work on a given day.

Note: Newly edited fields apply only to new Caregivers. Existing Caregivers retain existing availability.



Call Exception Notification Setup

This section allows Agencies to dictate which employees receive email notifications pertaining to verification failures or issues.

Call Exception Notification setup ((Failed Verification, Missed V	isits and Clock-in pric	or to shift end time) ① Histor
Alert email (weekdays):	davidbland@gmail.com		
Alert email (weekends):	jonsmith@yahoo.com		
Week day:	From: 1000	Te: 1400	Frequency (min): 20
Saturday:	From: 1200	To: 1400	Frequency (min): 20
Sunday:	From:	To:	Frequency (min):

Agency Profile: Call Exception Notification Setup

Field	Description
Alert Email (weekdays/weekends)	Enter the email address(es) in respective fields of the individual(s) at an Agency who receive notifications for failed Time and Attendance verifications, Missed Visits, and other visit verification items.
Weekday/Saturday /Sunday	Select the times when notification emails are to be sent. Generally, notification emails are sent outside of regular office hours, when system users would not be monitoring the Call Dashboard. Indicate the time and frequency on respective days (Weekdays, Saturdays, and Sundays).



Secondary Verification Calls

Secondary Verification Calls serve as an audit tool by sending out automated calls to confirm that a Caregiver is working their scheduled shift.

Secondary Verification Calls	History
Verification Call Audit: 9%	
Audit calls on week-end	

Agency Profile: Secondary Verification Calls

Field	Description
Verification Call Audit %	Enter the percentage of visits to receive a secondary verification call.
Audit Calls on Weekend	Select to determine whether audit calls are made for weekend visits.



Address

Enter the Agency's address in this section (as illustrated in the image below). Fields with a red asterisk are required.

Address (1)			History
Street 1:	1 Court Square	Street 2:	
City:	LONG ISLAND CITY	* State:	NY 🗸
* Zip:	11120 -	Phone:	
Fax:			

Agency Profile: Address



Payroll

Payroll setup is handled primarily on the <u>Payroll Setup</u> page. As a result, the Payroll section on the Agency Profile page only contains four fields, as illustrated and described below.

Payroll	
Warn Oser if PTO Absence Exceeds Accrued Hours:	
EVV Duty Code for "Worked During Meal": 777	EVV Duty Code for "Worked During Sleep": 999
OT Calculation Logic:	

Agency Profile: Payroll

Field	Description
Warn User if PTO Absence Exceeds Accrued Hours	Select to warn users who attempt to enter PTO Absence exceeding the benefit hours the Caregiver has accrued.
EVV Duty Code for "Worked During Meal"	Indicates the EVV Duty Code for Caregivers who worked through a meal for a Live-in visit. Contact the <u>HHAX Support Team</u> to set up this code.
EVV Duty Code for "Worked During Sleep"	Indicates the EVV Duty Code for Caregivers who worked through their designated 'sleeping' time for a Live-in visit. Contact the <u>HHAX</u> <u>Support Team</u> to set up this code.
OT Calculation Logic	The Agency's OT Calculation logic displays here.



Mileage Expense

Use the Mileage Expense section to set rules for Caregiver travel reimbursement.

Mileage Expense (i)						History
Enable Mileage Expense: 🕑 🛈	Maximum Distan	ce per Trip:	(Miles) 🛈	M	laximum Reimbursement per Trip: \$	(i)
Starting Location for First Mileage Reimbursement Calculation: Mileage Periods ①	Caregiver Home Address	Office Address	Other Address	1		Add
From Date 🔺	To Date			Pay Rate St	tatus	
01/01/2016	01/01/2017		s	5.000000 Ac	ctive	<u>Edit</u>

Field Description This reference field indicates if the Agency is set up for Mileage Expense calculations. Contact the HHAX Support Team to enable Enable Mileage Expense this feature. Use this field to set an amount limit of miles a Caregiver is reim-Maximum Distance per Trip bursed for per trip. Use this field to set a limit on the actual dollar amount a Caregiver is reimbursed per trip. Maximum Reimbursement per Trip **Note:** A **Trip** refers to the distance traveled from a specified starting location to the scheduled visit. Therefore, if a Caregiver works two visits a day, then they are reimbursed for two Trips. Starting Location for Select the starting location (Caregiver Home Address, Office Address, First Mileage Reimor Other Address) for the first **Trip** a Caregiver makes for any given bursement day. Set date ranges and default amounts used in Mileage Expense calculations; actual rates for Travel reimbursement. Click the Add button to add a new period or click on the **Edit** link to update an existing one. Complete the required fields in the Mileage Periods window to include: **Mileage Periods** • From/To Date: Select the effective date range. Pay Rate: Enter the rate dollar amount. • Active: Indicate whether Active or Inactive • Auto-Adjust Impacted Mileage Rate Dates: Select for the system to ensure continuity (and no overlap) between existing Mileage Rates and new ones.

Mileage Expense Section



Financial Reporting Setup

The Financial Reporting Setup section indicates certain financial reporting information.

reserved reporting setup	thatarx
Revenue Recognition based on: 📝 Date of Service 🔲 Invoice Date	Aging Reports: Age from due date Age based on date of service
Payment Recognition: Posting Date Deposit Date Check Date Transaction Date	
Closing Date for Revenues -Select-	
Closing Date for Payments select:	



Field	Description								
Revenue Recognition Based	Select either Date of Service or Invoice Date to indicate when the								
On	Agency recognizes revenue.								
Aging Reports	Select Age from due date or Age based on Date of Service to establish when Receivables age.								
Payment Recognition	Indicates when payments are considered received: Posting Date , Deposit Date , or Check Date .								
Closing Date for Revenue	Select the Revenue Closing Date.								
Closing Date for Payment	Select the Payment Closing Date.								



Agency Logo

Use the attachment (paperclip) icon to upload the Agency's logo under the **Picture** field.

Agency Logo (i)	
Picture: 🚫	eXchange

Agency Profile: Logo

This is standard functionality at the Agency level, only supporting one, unified logo across the system. Providers can add additional logos at the Office level to support an Agency's multi-office model, comprised of different business lines and/or regional affiliates.



Collection Setup

Collection Setup	History
Automatically close collection note if claim is paid Collection Status: R - Paid In Pull	Collection Status: 1 - Pending vi)

Collection Setup Section

Field	Description
Automatically close collection note if claim is paid	Select to prompt the system to automatically close collections when payment is received. This occurs with electronic remittances as well as when applying payments manually. Select the Collection Status to indicate a status to automatically apply to the collection.
If a denial is received via an ERA automatically update status	Select to automatically update the status if an ERA denial is received. Select the Collection Status to indicate a denial status.



Family Portal Message Notifications

Use this section to indicate who in the Agency is to be alerted when notifications are received from the Family Portal.

Family Portal Message Notifications		History										
Coordinator of Patient:	20											
Other System Users:	N O											
Other Email Addresses:	C C C C C C C C C C C C C C C C C C C											
	Note: For security reasons, email notifications will not contain actual message details. Message details will only be accessible through the HHARChange system.											
	Seve											

Family Portal Message Notifications

Field	Description
Coordinator of Patients	Select for the Patient's Coordinator to receive Family Portal notifications.
Other System Users	Select other Agency users to receive Family Portal notifications.
Other Email Addresses	Enter email address(es) to add to the Family Portal notification list.



Provider Self-Service Client ID for EVV API

DISCLAIMER

This feature applies and can only be seen by Providers configured to use 3rd party vendors for EDI. Please contact HHAX Support Team for details, setup, and guidance.

This feature helps Providers (who use third party vendors) to manage their Client ID and Client Secret (required credentials) when using EVV API.

To manage these fields, navigate to *Admin > Agency Profile*. On the *Agency Profile* page, in the *API Security Details* section, click on the *Add* button, as seen below.

API Security Details ①	Ì	Ì		Ì	-	Ì	Î	Ì		Î	Ċ	-	Ĩ	Î	~	Î	Î	9	Â			~	Ì		Ì	Î	Ì	A	^	Ì		ĺ	Å		0	Add	,
Client ID	Client Secret												Payers										N														
																										4											
																Sav	e.																				

Agency Profile: API Security Details

The **Client ID** and a new system-generated **Client Secret** code appears on the screen along with the Agency's associated Payers . Ensure to copy and save the **Client Secret** for future use (required to perform EVV API). Next, select the **Payers** applicable to the new set of credentials. Click *Save*.

API Security Details ①	cala lo año ay che che che he la forcase	، میلاد عرضه «، باهین»، باهی «.	t status at gr. Add
Client ID	Client Secret	Payers	
71ad744d-b710-4215-a754-d215d927b5e2	64b4f95e102e462a8a81095f5880b780	Demo ML (India Test Only) Demo ML Pune (India Test Only) Demo Rellycare (India Test Only) Life Care Demo Payer	Remove
	(Save	

New Set of EVV API Credentials

When returning to the *API Security Details* section, the **Client Secret** code is replaced with a security message (*Not shown due to security*). To add another set of credentials, click on the *Add* button. There is a limit of 2 sets of credentials at a time.



API Security Details ()	لى ئۈك ئۈك ئۈك ئۈك ئۈك ئۈك ئۈك ئۈك	د بای مارد مارد بالد بام یام یام بالد بالد بالد بالد بالد بالد بالد بالد	Alt di A. Q
Client ID	Client Secret	Payers	
71ad744d-b710-4215-a754-d215d927b5e2	Not shown due to security	Demo ML (India Test Only) Demo ML Pune (India Test Only) Demo Rellycare (India Test Only) Life Care Demo Payer	
		Save	

Adding a 2nd Set of Credentials

The second set of credentials appear on the second row. Repeat the process to save. Notice that the *Add* button becomes unavailable, as there is a 2-set limit at a time.

API Security Details ()			
Client ID	Client Secret	Payers	
71ad744d-b710-4215-a754-d215d927b5e2	Not shown due to security	Demo ML (India Test Only)	Remove
71ad744d-b710-4215-a754-d215d927b5e2	f5484d70234040dea1b8ec8dfd84a1ed	Demo Rellycare (India Test Only) Ufe Care Demo Payer	Remove
		Save	

Second Set of Credentials Added

To delete a set of credentials, click on the *Remove* button and then *Save*.

API Security Details ()	. *. 2 . *. *. *. *. *. *. *. *. *.	$(\mathbf{A}_{i}, \mathbf{A}_{i}, A$	Add
Client ID	Client Secret	Payers	
71ad744d-b710-4215-a754-d215d927b5e2	Not shown due to security	Demo ML (India Test Only) Z Demo ML Pune (India Test Only)	
71ad744d-b710-4215-a754-d215d927b5e2	Not shown due to security	Demo Relycare (India Test Only) Life Care Demo Payer	
		Save	

Removing a Credential Set

Providers can *Add* and *Remove* credential sets as needed as long as the correct set of credentials is provided to the 3rd party vendors to perform EVV API. If both sets of credentials are removed from the *API Security Details* section, then the EVV API is disabled until a credential set is added.

10 , 41, 75	م ماند بالد بالد , بالد (S, 11) ، بالد بالد	de de ne dy de de de de se, se de ve de de de se se se se de de .
API Security Details (1)		
Client ID	Client Secret	Payers
71ad744d-b710-4215-a754-d215d927b5e2	Not shown due to security	Demo ML (India Test Only) Demo ML Pune (India Test Only) Demo Rellycare (India Test Only) Life Care Demo Payer
		Save