



# 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 Customer Support](#).

## HHAX System Key Terms and Definitions

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

Term	Definition
<b>Patient</b>	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
<b>Caregiver</b>	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
<b>Provider</b>	Refers to the Agency or organization coordinating services.
<b>Payer</b>	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
<b>HHAX</b>	Acronym for HHAExchange

# The Appointments Function

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

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 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**.

Patient Filter Fields

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

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.

Additional Search Features

# Reviewing Search Results

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 (LIC-7897654654321436)	S:0800 - 1800 (HHA) V:0800 - 1800 Karrina, Imma	S:0800 - 1800 (HHA) V:0800 - 1800 Karrina, Imma	S:0800 - 1800 (HHA) V:0800 - 1800 Karrina, Imma	S:0800 - 1800 (HHA) V:0800 - 1800 Karrina, Imma			S:0800 - 1800 (HHA) V:- TEMP
Anderson, Adam (LIC-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 (LIC-7897654654321429)	S:0800 - 1200 (HHA) V:- Boyd, Patti	S:0800 - 1200 (HHA) V:- Boyd, Patti	S:0800 - 1200 (HHA) V:- Boyd, Patti	S:0800 - 1200 (HHA) V:- Boyd, Patti			S:0800 - 1200 (HHA) V:- Boyd, Patti
	S:1300 - 1700 (HHA) V:-	S:1300 - 1700 (HHA) V:-	S:1300 - 1700 (HHA) V:-	S:1300 - 1700 (HHA) V:-			S:1300 - 1700 (HHA) V:-

The Appointment Visit Guide: 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 - 10/17	TUESDAY - 10/18	WEDNESDAY - 10/19	THURSDAY - 10/20	FRIDAY - 10/21	SATURDAY - 10/22	SUNDAY - 10/23
Crytal, Billy (LIC-1005) (16)		S:0800 - 1200 (HHA) V:- Davis, Sammy	S:0800 - 1200 (HHA) V:- Davis, Sammy	ABSENCE Illness	S:0800 - 1600 (HHA) V:- Davis, Sammy		
Franqui, Jon (LIC-1065) (38)	S:1200 - 1600 (HHA) V:- Guide, David	S:1200 - 1600 (HHA) V:1200 - 1600 Guide, David	S:1200 - 1600 (HHA) V:1200 - 1600 Guide, David	S:1200 - 1600 (HHA) V:1200 - 1600 Guide, David	S:1200 - 1600 (HHA) V:- Guide, David		
		S:1200 - 1600 (HHA) V:1200 - 1600 Harris, Tyler	S:1200 - 1600 (HHA) V:1200 - 1600 Harris, Tyler	S:1200 - 1600 (HHA) V:1200 - 1600 Harris, Tyler	S:1200 - 1600 (HHA) V:- Harris, Tyler		
		S:1700 - 2300 (HHA) V:- McBride, Harriet	S:1700 - 2300 (HHA) V:- McBride, Harriet	S:1700 - 2300 (HHA) V:- McBride, Harriet	S:1700 - 2300 (HHA) V:- McBride, Harriet		

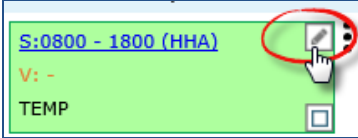
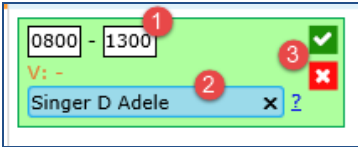


Caregiver Search Results

# Editing Visits

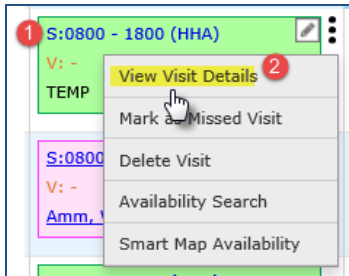
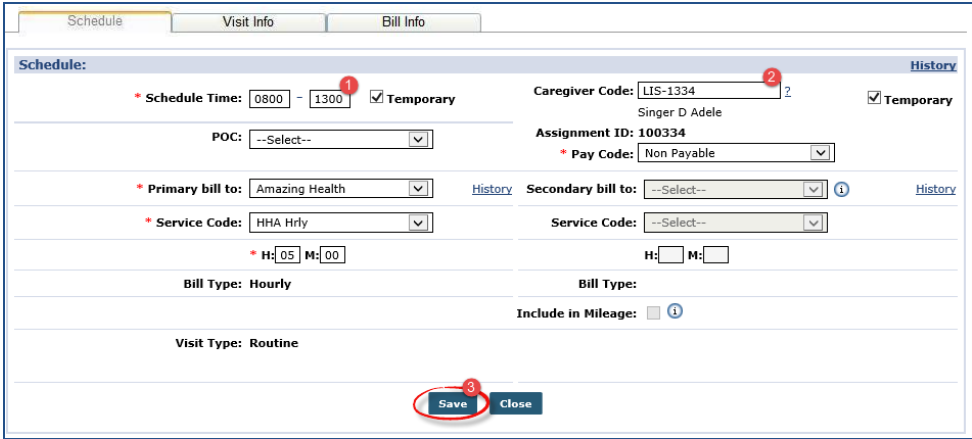
**Tip:** Press **Ctrl-F** on your keyboard to search this topic.

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 <b>Visit &gt; Appointments</b> 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 <i>edit</i> icon on the top-right corner of the cell (as illustrated in the image). 
3	The <b>Schedule Time</b> fields open (1) and the <b>Caregiver</b> 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 the “  ” to save the changes. Click the “  ” to cancel any changes made.

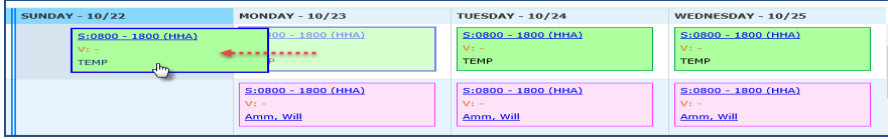

## Option 2

Step	Action
1	Navigate to <b>Visit &gt; Appointments</b> and generate a search to locate the desired visit based on the Patient or Caregiver.
2	<p>Click on the <b>Schedule Time</b> of the visit and select <i>View Visit Details</i> from the menu to open the <i>Visit</i> window.</p> <div data-bbox="673 535 1019 808" data-label="Image">  <p>A screenshot of a visit menu. The menu is open over a visit entry 'S:0800 - 1800 (HHA)'. The menu items are: 'View Visit Details' (highlighted in yellow), 'Mark a Missed Visit', 'Delete Visit', 'Availability Search', and 'Smart Map Availability'. A red circle '1' is around the visit entry, and a red circle '2' is around the 'View Visit Details' option.</p> </div> <p style="text-align: center;"><b>View Visit Details</b></p> <p>Other options include:</p> <ul style="list-style-type: none"> <li>• Mark a Missed Visit</li> <li>• Delete Visit</li> <li>• Search for a Caregiver using the <b>Availability Search</b> and <b>Smart Map Availability</b> functions.</li> </ul>
3	<p>On the <i>Visit</i> window (<i>Schedule</i> tab) make the necessary edits and click the <b>Save</b> button.</p> <div data-bbox="362 1108 1328 1543" data-label="Image">  <p>A screenshot of the 'Visit Window: Schedule Tab'. The window has three tabs: 'Schedule', 'Visit Info', and 'Bill Info'. The 'Schedule' tab is active. It contains various fields for scheduling a visit, including 'Schedule Time' (0800 - 1300), 'Temporary' checkbox, 'Caregiver Code' (LIS-1334), 'Assignment ID' (100334), 'Pay Code' (Non Payable), 'Primary bill to' (Amazing Health), 'Secondary bill to' (--Select--), 'Service Code' (HHA Hrly), 'Bill Type' (Hourly), and 'Visit Type' (Routine). At the bottom, there are 'Save' and 'Close' buttons. Red circles '1', '2', and '3' are placed over the 'Schedule Time', 'Caregiver Code', and 'Save' button respectively.</p> </div> <p style="text-align: center;"><b>Visit Window: Schedule Tab</b></p>




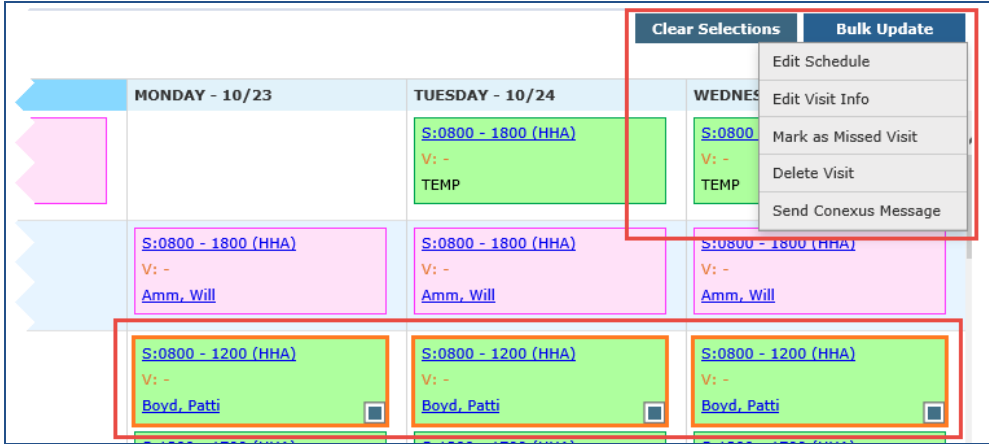
## Drag/Drop Visits

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

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

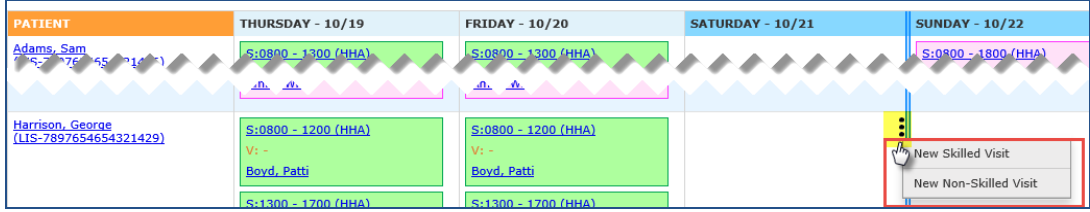
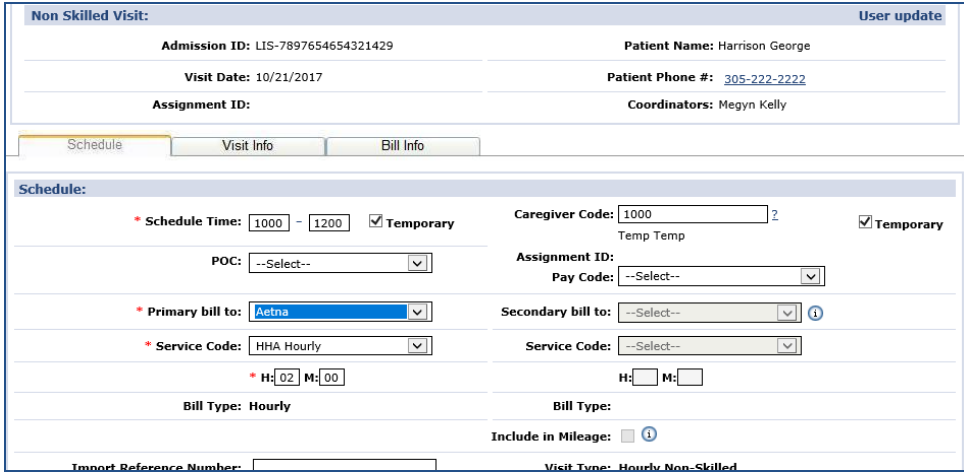
## Bulk Edit Visits

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

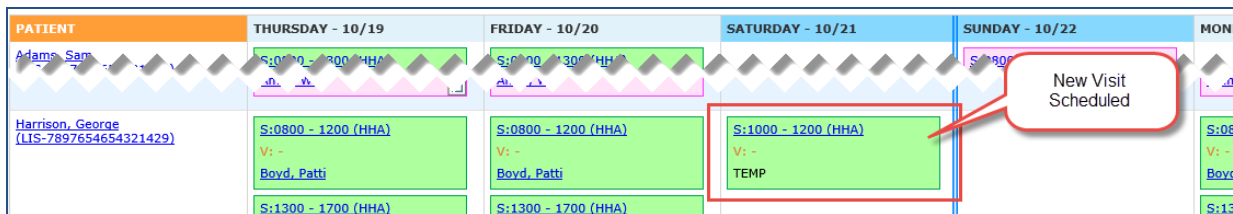
Step	Action
1	<p>On the Appointments grid, hover the cursor over the visit cell and select the blank checkbox on the bottom-right corner (as illustrated in the image). Repeat to select multiple visits.</p>  <p style="text-align: center;"><b>Select Visits for Bulk Update</b></p>
2	<p>When one or more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

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

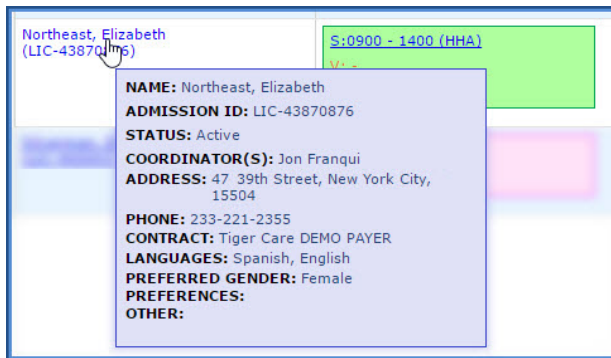
The new scheduled visit appears on the Appointments grid (as illustrated below).



**New Visit Scheduled**

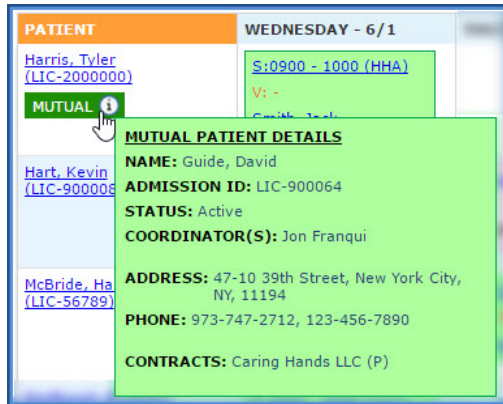
## The Patient Menu

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.



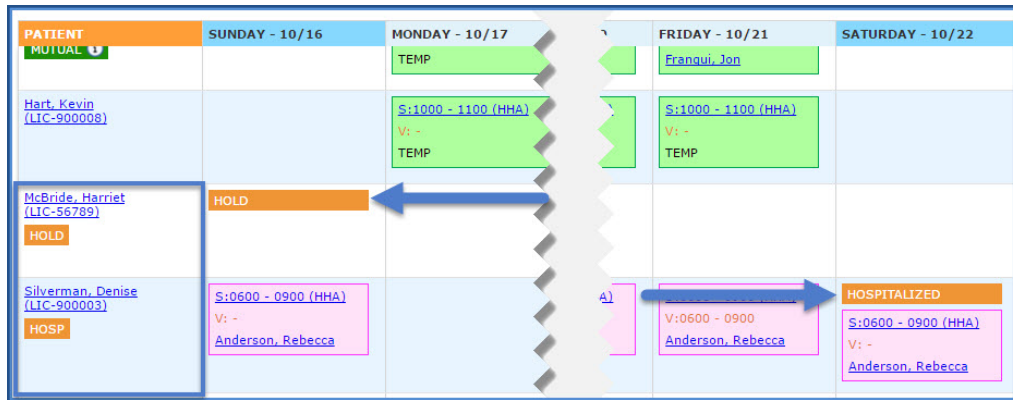
Patient Information

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



Mutual Case

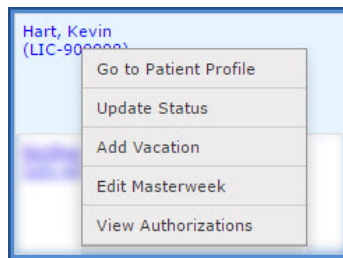
The **Appointments** page displays the Patient's **Status** as *Hold* or *Hospitalized* when applicable. It also marks the Start Date of the **Status** change in the corresponding Visit cell.



**Patient 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*.

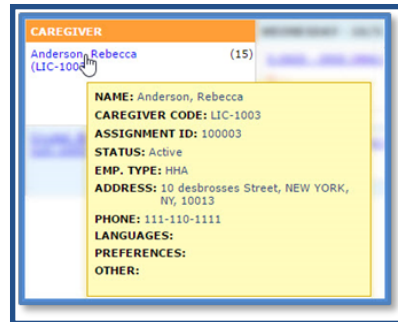


**Patient Menu**

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

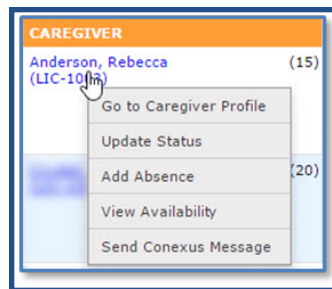
# The Caregiver Menu

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.



Caregiver Information

Click on the **Caregiver Name** (link) to open a menu options described in the table below (illustrated on the right).

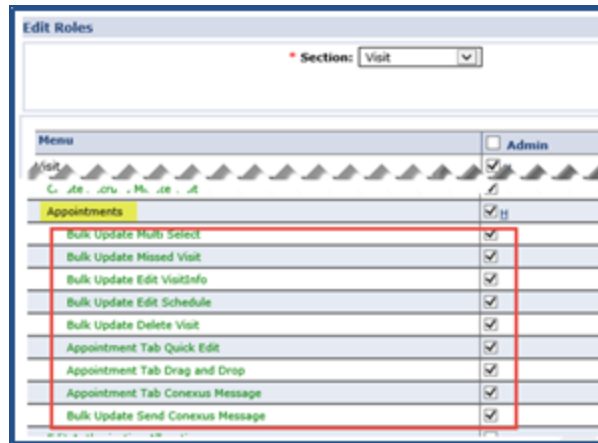


Caregiver Menu

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.
Send Conexus Message	Send a ConeXus message to the Caregiver.

# 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.

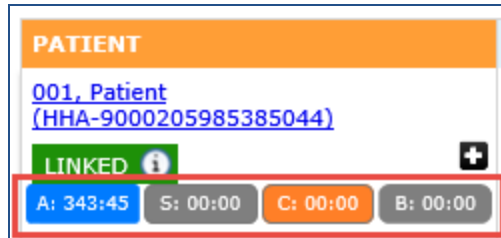


Appointment Function Permissions

Permission	Description (To allow...)
<b>Appointments</b>	access to the <i>Appointments</i> page
<b>Appointment Tab Conexus Message</b>	send Caregivers messages using ConeXus from the <i>Appointments</i> page.
<b>Appointment Tab Drag and Drop</b>	select scheduled visits, <u>drag</u> them to another Calendar cell, and <u>drop</u> them in the new date.
<b>Appointment Tab Quick Edit</b>	edit visits using the Edit icon
<b>Bulk Update Multi Select</b>	select multiple visits at a time on the <i>Appointments</i> page. The following permissions determine the actions to perform when selecting multiple visits. <ul style="list-style-type: none"> <li>• <b>Bulk Update Delete Visit</b> - to delete all selected visits</li> <li>• <b>Bulk Update Edit Schedule</b> - to edit schedule information for all selected visits</li> <li>• <b>Bulk Update Visit Info</b> - to edit confirmation details for all selected visits</li> <li>• <b>Bulk Update Missed Visit</b> - to mark all selected visits as "missed".</li> <li>• <b>Bulk Update Send Conexus Message</b> - to send a ConeXus message to the Caregivers assigned to the selected visits.</li> </ul>

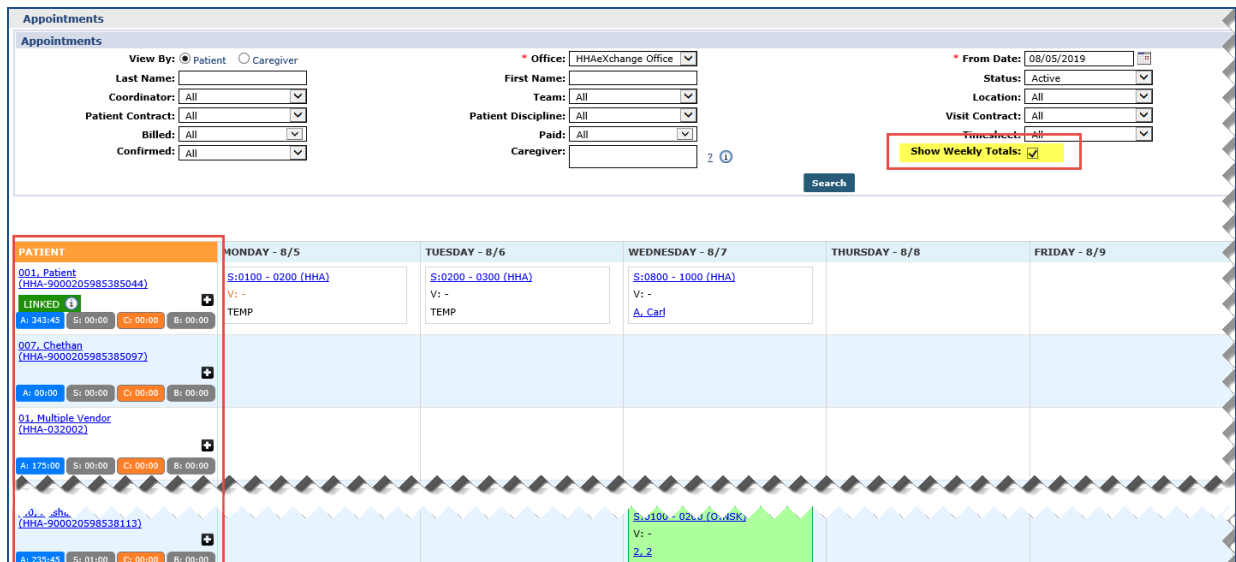
# Addition of Authorized Hours to Appointments Module

Authorization buckets have been added to the Appointments Module (*Visit > Appointments*) displaying Patients' Authorization utilization hours. These Authorization buckets help identify the availability and utilization of authorized hours for a selected payroll week.



Authorization Hours (Utilization)

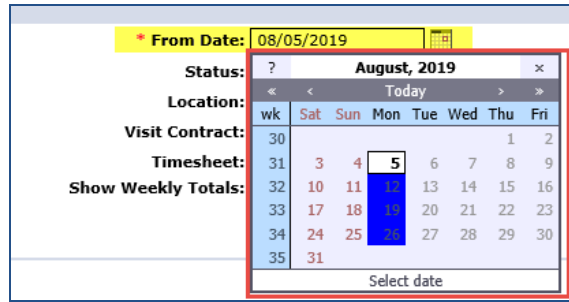
In the *Appointments* Module search filters, the **Show Weekly Totals** checkbox has been added. If selected, the calendar grid displays the Authorization buckets per Patient, as illustrated in the following image. When enabled, the cumulative and detailed value of *Authorized, Scheduled, Confirmed* 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).



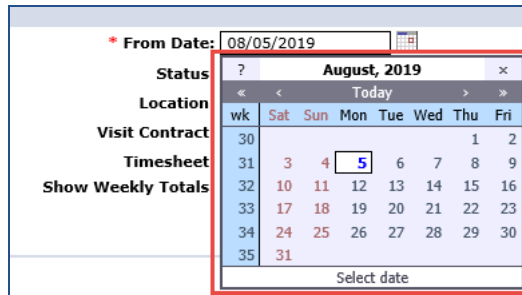
Appointments: Show Weekly Totals Enabled

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.





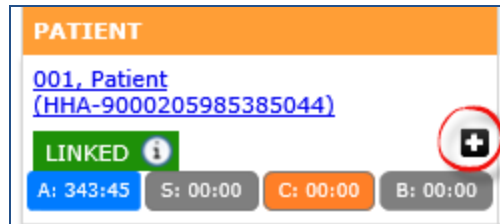
Show Weekly Totals Selected



Show Weekly Totals Unselected

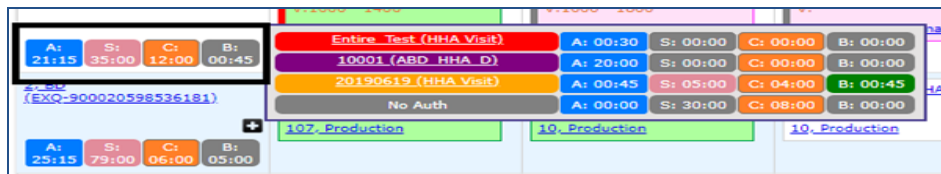
**Note:** If the Payroll Ending Date is updated for the Office, then the new Payroll Start Date is calculated based on the new Payroll End Date (i.e., Payroll Start Date = Payroll End Date + 6).

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



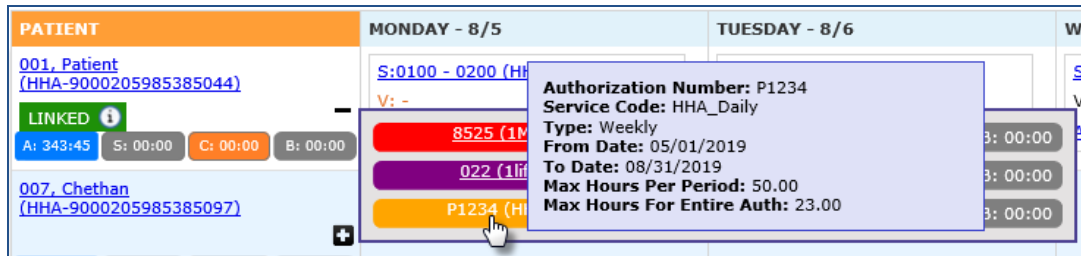
Expand Authorization Summary

Based on the image below, the Patient is authorized for **21.15** hours for the week (with **35:00** Scheduled, **12 :00** Confirmed, and **00:45** 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).



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*.



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 table provides definitions for the various colors.

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

Detail View	Red	Authorization 1
	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 (**HHA1 Daily** and **HHA2 Daily**) and the Authorized visit hours are divided based on the priority rules described above.

PATIENT	MONDAY - 2/11	TUESDAY - 2/12	WEDNESDAY - 2/13	THURSDAY - 2/14
18-1 - Vidula1072 (EXQ-900020598537781)				
A: 84:00 S: 07:00 C: 10:00 B: 07:00				
RN2 Daily (Service Code not available)		A: 00:00	S: 00:00 C: 00:00	B: 00:00
HHA1 Daily (Vidula HHA H1)		A: 21:00	S: 03:00 C: 03:00	B: 03:00
HHA3 Daily Private (HHA Hourly)		A: 21:00	S: 02:00 C: 05:00	B: 02:00
HHA4 Daily Private (HHA Hourly)		A: 28:00	S: 00:00 C: 00:00	B: 00:00
HHA2 Daily (Vidula HHA H1)		A: 14:00	S: 02:00 C: 02:00	B: 02:00

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 prebilling, 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.

Agency Info

General

\* Agency Name:

\* Agency Code:

MD Order ICD Code Requirement:

Validate ICD Code Selections:  ⓘ

Validate Truncated ICD Code Selection:  ⓘ

Orders Faxed this Month:  ⓘ

Care Path Dashboard Default Coordinator/Nurse:  ⓘ

Agency Initials: EXQA

Serviced Zip Codes: [Enter Serviced Zip Codes](#)

Master-Week Rollover on Deleted Visits:  ⓘ

Enable Automated Non-Compliance Restrictions:  ⓘ

Maintain Pay Code after Changing Caregiver on Visit:  ⓘ

Care Path Qualification Message:  ⓘ

Default to Show Weekly Totals in Appointments:  ⓘ

**Agency Info Page: Enable Authorization Hour Buckets**

# Calculation Updates

Visit and Daily Totals for Scheduled and Confirmed hours have been added to this feature. This enhancement provides 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.

THURSDAY - 10/1	FRIDAY - 10/2
<p>S:0700 - 0800 (HHA) V:0700 - 0800</p> <p>S: 01:00 C: 01:00</p> <p>Brook, Jeni</p>	<p>S:0700 - 0800 (HHA) V:0700 - 0800</p> <p>S: 01:00 C: 01:00</p> <p>Brook, Jeni</p>
<p>S:1200 - 1400 (HHA) V: -</p> <p>S: 02:00 C: 00:00</p> <p>anil, anjan</p>	<p>S:1100 - 1400 (HHA) V:1100 - 1400</p> <p>S: 03:00 C: 03:00</p> <p>anil, anjan</p>
<p>S: 03:00 C: 01:00</p>	<p>S: 04:00 C: 04:00</p>

Visit Totals and Daily Totals