

Care Insights Process Guide Provider and User Guide

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Care Insights

Overview

DISCLAIMER

This feature is activated by HHAX System Administration. Please contact <u>HHAX Support Team</u> for details, setup, and guidance.

As the industry trend evolves from a Fee for Service (FFS) payment model to one of Value Based Care (VBC), the **Care Insights** feature (formerly referred to as **Value-Based Care Measures**) incorporated into the HHAeXchange (HHAX) system captures services that go beyond the normal standard. This feature prompts Caregivers to record risk-based observations when Clocking Out of a visit. This feature helps organizations adhere to higher Patient care standards and report tangible measures to Payers; thereby receiving higher payment or receiving non-financial incentives for contributing to Patients' higher value care.

Moreover, by answering Care Insights questions, the risks can be mitigated by taking the precautionary steps to document the state of the Patient.

This category covers the **Care Insights** functionality in the HHAX system providing guidance and instructions on setting up VBC questions, creating alerts, managing a Patient's POC, and other key features.

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

As of February 2021, the system was updated to reflect various changes ranging from permissions to field label updates subsequent to the renaming of the feature, from *Value Based Care (VBC)* to *Care Insights*. Refer to the Updates to the Care Insights section for further details.

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 ser- vices.
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.
ННАХ	Acronym for HHAeXchange





Creating/Editing Care Insights (VBC Measures)

Care Insights are viewed and created in the *Duty List Setup* page; navigate to *Admin > Duty List Setup* and locate the applicable **Duty List Configuration** to open the *Edit Duty List Configuration* page. This page displays the List of Duties with the Value-Based Care duties included (as illustrated in the image below). To add a Value Based Care duty (or any other duty), click the *Add* button.

East Daty List Configu	Edit Duty List Configuration				
General				History	
	* Configuration Name:	Status: Active			
		Office(s): None Edit			
		Save			
List of Duties					
				Add	
Duty Code	Duty Name	Duty Category	Status		
100	Bath-Tub	Personal Care	Active	ď	
101	101 Bath-Shower Personal Care Active C				
1203 Percare-Snack A A A A A A A A A A A A A A A A A A A					
203	Perpare-Snack	Nutrition	Active	ď	
203	Perpare-Snack Assist with Feeding	Nutrition	Active	8	
203 204 300	Perpare-Snack Assist with Feeding Has the client received flu shot	Nutrition Nutrition Value Based Care	Active Active Active	2 2 2	
203 204 300 301	Perpare-Snack Assist winn reasing Has the dient received flu shot Has Client reported any falls since last shift	Nutrition Nutrition Value Based Care Value Based Care	Active Active Active Active	2 2 2 2 2	
203 204 300 301 302	Perpare-Snack Assist with reading Has the client received flu shot Has Client reported any falls since last shift Have you seen any new marks or bruises today	Nutrition Nutrition Value Based Care Value Based Care Value Based Care Value Based Care	Active Active Active Active Active	2 2 2 2 2 2 2 2 2	
203 204 300 301 302 303	Perpare-Snack Assist wirk receiling Has the client received flu shot Has Client reported any falls since last shift Have you seen any new marks or bruises today Has client had any falls on this shift	Nutrition Nutrition Value Based Care Value Based Care Value Based Care Value Based Care	Active Active Active Active Active Active	2 2 2 2 2 2 2 2 2 2 2 2 2	
203 204 300 301 302 303 304	Perpare-Snack Assist winn releasing Has the client received flu shot Has Client reported any falls since last shift Have you seen any new marks or bruises today Has client had any falls on this shift Has the client reported feeling lonely or sad	Nutrition Nutrition Value Based Care	Active Active Active Active Active Active Active Active	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
203 204 300 301 302 303 304 305	Perpare-Snack Assist wirm rééding Has the dien received flu shot Has Client reported any falls since last shift Have you seen any new marks or bruises today Has dient had any falls on this shift Has the dient reported feeling lonely or sad Has the patient reported increased pain	Nutrition Nutrition Nutrition Value Based Care	Active Active Active Active Active Active Active Active Active	8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	

Value Based Care Duties

Note: Duties cannot be deleted from the Duty List; only edited by clicking on the editing icon (*III*) from the applicable row. To deactivate a duty, change the **Status** to Inactive.

The *Add Duty* window opens. Complete the available fields (required if denoted with a red asterisk) as described in the table underneath the image.

These are the settings that appear on the Alert Dashboard.

Once complete, click *Save* to finalize.



HHA Exchange - Edit Duty	×
Edit Duty Histo	ory
* Duty Code: 800	
* Duty Name: Did you observe any change	
* Duty Category: Value Based Care 🗸	
Mobile Response Required: 🗹 🗓	
Status: Active V	
Alert Setup - Value Based Care	
If Duty Refused, Skip through Duty: (950) -Did you obse 🗸 3	
Enable Mobile 🗹 🛈 Notes: 🗹 🚺 Mandatory For: Both 🗸 🛈	
Set alert on "Yes": ✓ History Priority Level: High ✓ Alert Description: High alert ✓	
Set alert on "No": 🗹 History	
Priority Level: Informational 🗸	
Alert Description:	
Save Cancel	

Adding a VBC Duty

Field	Description
*Duty Code	Create a unique code for the duty; used by a Caregiver when entering a duty at Clock-OUT
*Duty Name	Enter a VBC Duty Name (100-character limit). <i>Note: This Duty Name is presen-</i> ted to the Caregiver at Clock-Out when using "text to speech".
*Duty Category	Select <i>Value Based Care</i> from the dropdown. When VBC is selected, the win- dow expands for Alert Setup options (described below).
Mobile Response Required	Select this checkbox if a response is required from the Caregiver via the Mobile App. This checkbox is available for ALL duties (not exclusive to VBC). Refer to the <u>Mobile App</u> section. Note: If selected for a Duty, then the Caregiver must respond Yes or No to Clock Out successfully.
Status	Select Active to display.
Care Insight Setup	
If Duty Refused, Skip through Duty	If a Caregiver responds No or Skip to this VCB Duty, then the system skips the group of applicable questions for this VBC duty.
Enable Mobile Notes/ Mandatory For	To enable Mobile Notes for a VBC duty, select the Enable Mobile Notes checkbox. In the Mandatory For dropdown field, select <i>Yes, No,</i> or <i>Both</i> (Yes and No) to require a Caregiver to enter an observation note for the



Field	Description
	VBC. Refer to the <u>Mobile Notes Required</u> section.
Set Alert on Yes	If the Set alert on Yes checkbox is selected, then an alert is created when a Caregiver responds "Yes" to the VBC duty. Set the Priority Level (Critical, High, Moderate, and Informational) and add an Alert Description (optional) that displays on the Alert Dashboard when the alert is issued.
Set Alert on No	If the Set alert on No checkbox is selected, then an alert is created when a Caregiver responds "No" to the VBC duty. Set the Priority Level (Critical, High, Moderate, and Informational) and add an Alert Description (optional) that displays on the Alert Dashboard when the alert is issued.

Note: When setting a Care Insights alert, an **Alert Description** must be entered for all selected alerts (both or either Yes or No); otherwise, a validation message appears preventing the system from saving the alert setup.

Edit Duty History				
• Duty Code: 10				
* Duty Name: this is testing found this is				
* Duty Category: Value Based Care V				
Mobile Response Required: 🗌 🗓				
HHA Exchange - Validation				
- You have not entered an alert description. Please add an alert description before saving.				
Set alert on "Yes": 🗹 History				
Priority Level: Critical V				
Alert Description: abcd				
Set alert on "No": 🗹 History				
Priority Level: Critical V				
Alert Description:				
Save				

Alert Description Validation



Patient POC

Once added to the Duty List, the Value Based Care Measures are made available to select in the Patient's POC.

Navigate to the *Patient > POC* page and click on the POC Number link to open the POC Duty List.

Patient Info - Active			
Name: Neeson Marcus DOB: 05/19/1974			
Coordinato	rs: Sandeep Nayak	•	
POC			
POC Number +	POC Start Date	POC Stop Date	
2275400	03/04/2019	Edit H	

Patient POC

On the *POC Duty List* window, the newly added *Care Insights (Value Based Care Measure(s)* appear. Select the applicable ones to apply to the Patient's POC (as illustrated below) and click *Save*.



Applying Care Insights (Value Based Care Measures) for a Patient

POC (Linked Contract Patients)

Typically, Providers create the VBC duties in the system for a Patient. However, for Linked Contract Patients, VBC duties are created on behalf of the Payer by HHAX Support and mapped to Provider-created duties.

In the POC page, under the **Task #** column, the Payer Duty Code precedes the Provider Code (in parenthesis), followed by the Payer Duty and the Provider Duty Name (in parenthesis).



<u>Category</u>	<u>Task #</u>	Duty	As Requested	Times a Week (Min) - (Max
Personal Care	1	1 Number	•	1 -
Value Based Care	100(605)	Is patient health in good condition today?(Is patient quieter than usual)		1 .
Value Based Care	101	Is patient able to stand alone without any help?	•	1 -
Value Based Care	102	How is patient's behavior after brain surgery oper		1 -

Linked Contract Patient: POC

If there is no mapped Provider Duty, then only the Payer Duty Code and Name displays.

Associating the POC to a Visit

If the Patient has multiple POCs, then associate the applicable POC to each visit manually via the **Patient** > **Calendar** > **Schedule** tab or via the **Patient** > **Master Week** page (as illustrated in the images below).

Schedule	Visit Info	Bill Info	
Schedule:			
*:	Schedule Time: 1200 - [Temporary	1300	
	POC: 2275400-0	03/04/19	
*	Daimana hill tas Contract C		Uistan Fr
	Schedule Tab: Sele	ect POC	

Add/Edit Master Week			
 From Date: 		To Date:	
Copy Master Week	Thursday	Friday	Saturday
Hours:	-	-	
Caregiver:	2	2	
Assi. ID:			
Pay Code:	Select 🔽	Select 🗸	Select
POC:	2275400 🗸	2275400	Select
Bill To:	Select 🗸	Select 🗸	Select
	H-O M-O	H-O M-O	H- D M-R

Master Week: Select POC



Completing VBC Questions

Mobile App

Once a Patient POC is saved, the Caregiver is presented with the selected Value Based Care Questions each and every time a Clock Out is performed for a visit associated with that POC, as illustrated in the images below (using the Mobile App).

The Value Base Care Questions section displays below the Plan of Care Tasks section in the *Visit Detail* screen. All duties remain as read-only until a Caregiver begins to perform a **Clock Out** (when duties and questions become available to select). Duties and VBC Questions that are required are denoted with a red asterisk (*).



Mobile App: Value Based Care Questions



Cancel Visit Detail Greg Baker	Save
 Plan Of Care Tasks: 	
100 - Bath-Tub	✓ X
103 - Patient requires Total Care	✓ X
- Value Based Care Questions	8:
*700 - Has the member received a flu shot?	✓ X
*701 - Has the member reported any falls since last shift?	✓ X
*702 - Have you seen any new marks or bruises today?	✓ X
*703 - Has the client reported feeling lonely or sad?	✓ X
- Other Tasks:	
101 - Bath-Shower	✓ X
102 - Bath-Bed	✓ X

Clock Out

A Caregiver cannot complete a Clock Out if a duty or VBC question requires response. If required response duty or VBC question is unanswered, the Caregiver is alerted (as seen in the image below). A response must be entered before saving.

Can	Icel Visit Detail Greg Baker	Save
— F	Plan Of Care Tasks:	
100 - E	Bath-Tub	• X
- \	/alue Based Care Questions:	
*70′ flu s *70 falls	You must choose responses for a required items before clicking Sav	all /e.
*70. or brui:	OK ses today?	·

Required Response

Once complete, the system alerts of a successful Clock Out.



K Back	Visit D Greg E)etail Baker	(?)(<i>(</i>)(+)			
	Clock I	n/Out	Directions			
01/20 at 07:15A	м	01/20 at	07:30AM			
Confirmed: 12:	25PM 🗸	Confirme	ed: 12:30PM 🗸			
Visit Verificatio	on Statu	S				
Service: HHA (Unverified)						
Visit Time: 12:	25PM - 1	11:30AN	(Unverified)			
You have	been suc Ou	cessfully it.	Clocked			
	O	ĸ				
			<u></u>			

Successful Clock Out

Mobile Notes Required

When **Mobile Notes** (Observations) are required (as configured in the *Duty List Setup*), the VBC Questions appear on the Mobile App requiring responses (denoted by red asterisks) when the Caregiver performs a Clock Out for a visit.

A pencil icon is visible (in gray) and becomes available to enter a Note (Observations) once the response is selected for the required VBC questions, as seen in the following image.

Cancel Visit Detail Greg Baker	Save
 Plan Of Care Tasks: 	
100 - Bath-Tub	✓ X
103 - Patient requires Total Care	✓ X
 Value Based Care Question 	ns:
*700 - Has the member received a flu shot?	✓ X
*701 - Has the member reported any alls since last shift?	✓ X
*702 - Have you seen any new marks or bruises today?	✓ X
*703 - Has the client reported feeling lonely or sad?	✓ X
 Other Tasks: 	

VBC Questions

To complete, the Caregiver clicks on the pencil icon, enters the note, and clicks *Save*, as seen in the following image.







Note: To edit a Note, click on the pencil icon to reopen the Note screen.

If a required Note is not entered, then the Mobile App highlights the required questions (in yellow) and generates an error alert that a Note (Observation) must be entered to proceed.



IVR (EVV via Phone)

Complete the following steps to Clock Out using IVR for a Patient with VBC questions as part of their POC.

Step	Action
1	Complete the standard Duty Code entry process during an IVR Clock-Out.
2	Enter "000" to <u>continue</u> to answer Care Insights/Value Based Care questions.
3	The system initiates the Care Insights/Value Based Care portion of the call, prompting the Care-



Step	Action
	giver with VBC questions (one by one).
4	The Caregiver dials the appliable response for each (1 for Yes, 0 for No, or * to Skip).
5	The call ends once all Care Insights/VBC questions are answered.



Patient's Care Insights Measures Page

Responses to Care Insights (VBC) Measures are viewed and managed in the *Care Insights Measure* page under the Clinical section (*Patient > Care Insights*). As illustrated in the following image, the left side of the grid displays the selected Care Insights Measures on the Patient's POC. The right side displays the visits in columns (7 at a given time).

Patient Info - Active									
Name: Neeson Marcus		Admission ID: 980-9000205985385315			Patient ID:		Contract: Contract Compliance value		
DOB: 05/19/1974	Prin	mary Alt. Patient ID:		Home	Home Phone: 631-938-1470		Address: CONCORD, CA, 94520		
Coordinators: Sandeep Nayak		Office: Vidula QA 10.0		Lan	Languages:		64		
Value Based Measures									
Value Based Measure: All	~		From:	•	To:	2		Search	
Search results(12)								Page 1 of 2 Next	
Measure	Date 11 Scheduled 12 Confirmed 12	1/18/2019 200-1300 200-1300 Edit	11/11/2019 1200-1230 1200-	11/07/2019 1200-1530 1200-	10/26/2019 0700-0930	10/25/2019 0700-0930	10/24/2019 0700-0930	10/23/2019 0100-0300 0100-0258 Edit	
208 - Has client received flu shot	Ye	es	N/A	N/A	N/A	N/A	N/A	Yes	
209 - Has client reported any falls since the last shift	No	0	N/A	N/A	N/A	N/A	N/A	Yes	
210 - Have you seen any new marks or bruises today	No	0	N/A	N/A	N/A	N/A	N/A	Yes	
211 - Has client had any falls on this shift	No	0	N/A	N/A	N/A	N/A	N/A	N/A	
212 - Has the client reported feeling lonely or sad	Ye	es	N/A	N/A	N/A	N/A	N/A	N/A	

Patient Care Insight Measures Page

The page also includes search filters allowing user to search by a specific **Care Insights Measure** as well as **From** and **To** date ranges. All active VBC Duties appear in the **Care Insights Measure** (dropdown) field, as seen in the following image. For Linked Contract Patients, the Provider Duty Names display with the mapped duty code in parenthesis.

Value Based Measures										
Value Based Measure:	All		•			From:		To:		Search
Search results(14)		Q								Page 1 of 2
Measure	[Select all]	<u>^</u>		01/01/2020		12/06/2019	10/26/2019	10/25/2019	10/24/2019	10/23/2019
	100(605)-Is patient quieter than usual		Edit	0900-1000	Edit	0100-0200 Edit				
100(605) - Is patient quieter than u	101-Is patient able to stand alone without	any help?		No		N/A	N/A	N/A	N/A	N/A
101 - Is patient able to stand alone	102-How is patient's behavior after brain s	urgery oper		No						
102 - How is patient's behavior after	283-Value based Care	-				N/A	N/A	N/A	N/A	N/A
283 - Value based Care						N/A	N/A	N/A	N/A	N/A
801 - Value Based 1						N/A	N/A	N/A	N/A	N/A
802 - Value Based 2						N/A	N/A	N/A	N/A	N/A
803 - Value Based 4						N/A	N/A	N/A	N/A	N/A
805 - Value Based 6						N/A	N/A	N/A	N/A	N/A
808(601) - Has client received flu sh	ot					N/A	N/A	N/A	N/A	N/A
901 - This is VBC duty						N/A	N/A	N/A	N/A	N/A
987 - VBC code mapped						N/A	N/A	N/A	N/A	N/A
998(603) - Have you seen any new r	marks or bruises today			No		N/A	N/A	N/A	N/A	N/A
999(604) - Has client had any falls o	in this shift			No		N/A	N/A	N/A	N/A	N/A

Care Insights Measures Search Filters

Confirmed visits are indicated by the answered Care Insights questions with Yes, No, or N/A (for skipped answers), along with an Edit link to the right of the column. Unconfirmed visits display as blank cells.

Date Scheduled Confirmed	11/18/2019 1200-1300 1200-1300	Edit
	Yes	
	No	
	No	
	No	
	Yes	

Confirmed





Unconfirmed

Care Insights Measures can be edited in cases where the Caregiver recorded an incorrect answer, the call dropped before finalizing, or the Caregiver forgot to Clock Out. To edit, click on the Edit link to the right of the column.

Date duled irmed	11/18/2019 1200-1300 1200-1300	Edit	11, 12(12(
	Yes	2	N/A
	No		N/A
	No		N/A

The Care Insights Edit window opens. Make the proper corrections and click Save to finalize.

HHAeXchange - Value Based Care	Duties - Edit 🛛 🗙	^
208 - Has client received flu shot	Yes V	
209 - Has client reported any falls since the last shift	Yes No	
210 - Have you seen any new marks or bruises today	No	
211 - Has client had any falls on this shift	No	
212 - Has the client reported feeling lonely or sad	Yes 🗸	~

Editing Care Insights Duties

When a change is made to a Care Insights duty response, the system issues an alert to the Care Insights Alert Dashboard (if an alert is set up for that duty). *Note:* Duplicate alerts for the same duty are not issued.

Mobile App Notes On Patient Care Insights Page

In the Patient's *Care Insights Measures* page, Note icons indicate that a note was added to a VBC Duty/Observation by the Caregiver at the time of Clock-Out via the Mobile App.



Value Based Measure: All			•		From:	
Search results(49)						
Measure	Date Scheduled Confirmed	10/16/2020 0730-0745 0730-0741	10/16/2020 0800-0815 Edit 9 600-0828	1 1 Edit	0/15/2020 030-1045	10/14 0215- 0215-
102 - Is Patient able to walk on his own alone?		Yes	📝 Yes	2		No
107 - Is Patient experiencing any digestion issues after dinner?		Yes	Yes			No
122 - Feeling Cold more often?		Yes	No			No

VBC Note via the Mobile App

Hover over the icon to view the entered note (as seen in the image to the right).

Sauch saudte(40)				
Measure	Date Scheduled Confirmed	10/16/2020 0730-0745 0730-0741	10/16/202 0800-0815 Edit 0800-0828	0 10/15/20 1030-104 Edt
102 - Is Patient able to walk on his own alone?		Yes	📝 Yes	2
107 - Is Patient experiencing any digestion issues after dinner?		Yes Carey	iver Mobile Note	
122 - Feeling Cold more often?		Yes Is Pat	ient able to walk on	his own alone?

Caregiver Mobile Note



Care Insights Alert Dashboard

The **Care Insights Alert Dashboard** is used to view and manage all VBC alerts (IVR and Mobile App). To access the Dashboard navigate to *Action > Care Insights Alert Dashboard*. The page consists of Search filter fields (at the top of the page) and a Search Results grid (as seen in the following image).

0)ffice(s):	All	~	Caregiver Team:	Select options	~	Patient Team:	Select options	~	Nurse:	Select options	
	Status:	2 options selected	•	Caregiver Location:	Select options	v P	Patient Location:	Select options	•	Coordinator:	Select options	
•	Priority:	All	~	Patient Name:			* From Date:	02/05/2020		* To Date:	03/05/2020	
А	ssignee:	Select options	~									
						Search						
												_
lerts												
lerts	ults (190)										Page 1 of 8 N	levt
lerts earch Resu	ults (190)					5	× 6	0	8	9	Page 1 of 8 <u>N</u>	iext
lerts earch Resu lority	ults (190) 2 <u>Received</u>	3 <u>Time Elapsed</u> (dd:hh:mm:ss)	Alert	4		5 Patient	<u>Coordinator</u>	Caregiver	8 Nurse	9 Assignee	Page 1 of 8 N 10 Alert Status	Next L Ec
lerts earch Resu iority formational BC)	03/05/2020 05:39:26	3 Time Elapsed (dd:hh:mm:ss)	Alert This is 1	4 Yes for 603(Informati	onal)	5 Patient Anderson,	Coordinator	Caregiver R1 AB, Donald	8 Nurse Base, Cinthia	9 Assignee	Page 1 of 8 N 10 Alert Status Open	iext L Eg
lerts arch Resu iority formational BC) tical BC)	2 Received 03/05/2020 05:39:26 03/05/2020 05:39:26	3 Time Elapsed (dd:hh:mm:ss) 0:00:04:04 0:00:04:04	Alert This is 1 605: Ale	4 Yes for 603(Information	onal)	5 Patient Anderson, Anderson,	Coordinator , Bob RANI WALKE	Caregiver R1 AB, Donald R1 AB, Donald	8 Nurse Base, Cinthia Base, Cinthia	9 Assignee	Page 1 of 8 M 10 Alert Status Open Open	No L L
lerts earch Resu iority formational BC) (tical 1) (tical 1) BC) (tical 1) (t	2 Received 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020 05:39:26	3 Time Elapsed (dd:hh::mm:ss) 0:00:04:04 0:00:04:04 0:00:04:04	Alert This is 1 605: Ale This is 6	4 res for 603(Informati ert 501 NO	onal)	5 Patient Anderson, Anderson,	6 Coordinator , Bob RANI WALKE , Bob RANI WALKE	Caregiver R1 AB, Donaid R1 AB, Donaid R1 AB, Donaid	8 Nurse Base, Cinthia Base, Cinthia Base, Cinthia	9 Assignee	Page 1 of 8 M 10 Alert Status Open Open Open	NM L Ec
lerts earch Resu iority 'ormational BC) BC) BC) BC) BC) BC) BC)	ults (190) 2 Received 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020 05:39:26	3 Time Elapsed (dd:hh:mm:ss) 0:00:04:04 0:00:04:04 0:00:04:04 0:00:04:04	Alert This is 1 605: Ale This is 6 604: Hi	4 vies for 603(Informati ert 501 NO gh on NO alert (Perfo	onal) rmed)	5 Patient Anderson, Anderson, Anderson,	Bob RANI WALKE , Bob RANI WALKE , Bob RANI WALKE	Caregiver R1 AB, Donald R1 AB, Donald R1 AB, Donald R1 AB, Donald	8 Nurse Base, Cinthia Base, Cinthia Base, Cinthia	9 Assignee	Page 1 of 8 N 10 Alert Status Open Open Open Open	Ne L S S S S S S S S S S S S S S S S S S
lerts earch Ress iority formational BC) tical BC) ph BC) 1 ph BC) 1 1 1 1 1 1 1 1 1 1 1 1 1	2 Received 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020 05:39:26 03/05/2020	3 Time Elapsed (dd:hh:mm:ss) 0:00:04:04 0:00:04:04 0:00:04:04 0:00:04:04 0:00:04:04	Alert This is 1 605: Ale This is 6 604: Hi 602: Ale	4 res for 603(Informati ert 501 NO gh on NO alert (Perfo ert	onal) rmed)	5 Patient Anderson, Anderson, Anderson, Anderson,	6 Coordinator , Bob RANI WALKE , Bob RANI WALKE , Bob RANI WALKE , Bob RANI WALKE	Caregiver R1 AB, Donald R1 AB, Donald R1 AB, Donald R1 AB, Donald R1 AB, Donald R1 AB, Donald	8 Nurse Base, Cinthia Base, Cinthia Base, Cinthia Base, Cinthia Base, Cinthia	9 Assignee	Page 1 of 8 M 10 Alert Status Open Open Open Open Open	No L Fo UR ((((

Care Insights Alert Dashboard

Use the Search filter fields to narrow searches by *Office, Teams, Status,* and other available fields. The **Priority** field as well as the **From/To Date** fields are required (denoted with a red asterisk) to generate a search. The **Assignee** field lists all users (roles) with permissions to the Care Insights Dashboard; refer to the <u>Permissions</u> section.



The Search Results display various details per line item as described in the following table. By default, the columns are sorted by time received.

	Column	Description
1	Priority	 The alert priority is system-generated based on the Duty Setup for a VBC at the time of Clock-Out, as follows: Critical: Red alert icon :; requires immediate attention High: Yellow alert icon :; requires attention Moderate: Non-emergency; may require monitoring Informational: Used for informational purposes Note: Changing the duty alert priority does not change the generated (initial) alert priority.
2	Received	Indicates when the message was generated and received in the sys- tem.
3	Time Elapsed	Indicates the time that has lapsed between the received time and the time of the search.
4	Alert	The alert description as defined in on the Duty Alert Setup
5	Patient	The Patient for whom the alert is applicable
6	Coordinator	The Patient's Coordinator
7	Caregiver	The Caregiver for the visit
8	Nurse	The Patient's Nurse
9	Assignee	Select one or more Assignees. The Assignee filter field is populated with Active Users who have the <i>Care Insights Alert Dashboard</i> per- mission enabled for the Patient's Office.
10	Alert Status	Current Status of the alert: Open , In-Progress , or Closed
11	Notes/Follow-up	Icon (link) used to manage the alert. Refer to the next section.



Managing Care Insights Alerts

To manage a Care Insights alert, click on the pencil icon on the right-most column of the applicable row in the Search Results (as seen in the image to the right).



The *Alert Note* window opens with alert details (such as the **Patient's Name**, **Visit Date**, **Alert Time**, **Priority**, **Status**) and history of documented follow-up notes (as seen in the image to the right).

Patient Na Visit D Visit Start Ti Visit End Ti	ime: ROY, Prebi ate: 03/05/202 ime: 06:00 ime: 07:09	illing A :0	Ale	Alert: Did you notice any change in t patient's physical condition? rt Time: 07:17:36 PM Priority: Critical Status: Open	he Nurse: Coordinator: Krunal_Coord Caregiver: ROY, NonSki	dinator lled
otal Recor	ds (3)					
Date/Time	User	Nurse	Assignee	Action Taken	Note	Status
03/05/2020 07:17:36	shekhussp				The patient looks weaker	Open
03/05/2020 09:17:51	shekhussp	Alan Johnson	Bavaria, Rajnish	Improved Medication		In Progress
03/05/2020 09:18:28	shekhussp	Base Cinthia	Bavaria, Rajnish	Give Immediate Oxygen	Gave oxygen and updated the nurse.	In Progress
					G	
Action Tal	ken: Select		v Ass	ignee: Bavaria, Rajnish (rajnish@	Note:	
Nu	rse: Select		• * s	tatus: Select	•	

Care Insights Alert Note

Note: Mobile Required Notes (observations) entered by the Caregiver appear under the **Note** column for applicable response.

Adding Alert Notes

To add a *New Note*, select the applicable fields, described in the following table.

Field	Description
Action Taken	Select the action to be taken. These values are created via the Reference Table Management function. Refer to the <u>Value Based Care Action Taken</u> <u>Reference Table</u> section below.
Assignee	Select an Assignee to handle the alert.
Nurse	Select to assign a Nurse to the alert.
*Status	(Required) Select the Status of the alert; can be changed from <i>Open</i> to <i>In Progress</i> or <i>Closed</i> .
Note	Enter additional details



Click *Save* (to save and continue entering other notes) or *Save and Close* (to save and exit the window) to save the Note.

Value Based Care Action Taken Reference Table

Alert Note dropdown fields are created and managed in the Value Based Care Action Taken Reference Table (Admin > Reference Table Management), under the Clinical/MD Order category.



Permissions

To enable Care Insights Alert Dashboard permissions for a role, navigate to *Admin > User Management > Edit Roles*. Select *Action* from the **Section** dropdown and applicable roles from the **Roles** dropdown.

Select Care Insights Alert Dashboard checkbox and click Save.



Care Insights Dashboard Permissions

Refer to the Added Care Insights Permissions section for further details on newly added permissions.



Copy Note Details to Other Open Alerts for the Same Visit

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

Providers can copy note alert details to alerts within the same visit using *Open* and *In Progress* alert notes. This feature must be enabled at the Agency level.

To enable the **VBC Copy Note** feature, navigate to the *Agency Profile* page (*Admin > Agency Profile*). In the *General* section select the following settings (as seen in the image below and described in the table underneath):



Agency Profile: VBC Alert Fields

Select	То
Copy Note To All Open VBC Alerts By Default	Automatically select the Copy Details to Open Alerts checkbox in the VBC Alert Note feature.
Enable Copy Note To All Open VBC Alerts	Allow the use of the Copy Details to Open Alerts in the VBC Alert Note feature.

Care Insights Open Alert

Once the feature is enabled, a **Copy Details to Open Alerts** checkbox appears on an opened Alert Note (as seen in the image below), allowing a user to copy responses to all other open alerts for a visit. When saved, the Note details (such as **Nurse**, **Assignee**, **Action Taken**, **Note**, and **Status**) copy to the other open alerts from the same visit.



Visit D isit Start T Visit End T	ime: Patient, 12.A iate: 10/01/2020 ime: 05:00 ime: 06:00	ug	Alert Alert for No Nurse: Alert Time: 10:01:44 AM Coordinator: RANI WALKER Priority: Critical Caregiver: 13, 12 Alert Status: Open				
tal Recor	ds (3)						
ate/Time	User	Nurse	Assignee	Action Taken	Note	Stat	us
5/03/2019 5:56:30	Admin Update			No Action Taken		Oper	
5/03/2019 5:56:30	Admin Update			No Action Taken		Oper	1
0/01/2020 D:01:44	shekhussp			No Action Taken		Oper	· · ·
New Note Action Tal	ken: Select		~ As	signee: Select	~ N	ote:	
Nurse: Select			*	Status: Select	~		

VBC Alert Note: Copy Details in Open Alerts Checkbox

Copying Open Alerts for the Same Visit

When viewing an Open or In Progress Alert Note, Providers can copy responses to other Open Alerts for the same visit. The image below illustrates the **Open Alerts** for the same visit. To copy responses to the other Open Alerts, select the **Copy Details to Open Alerts** checkbox. Once saved, any information entered in the **New Note** section for this alert copies over to the Open Alerts listed.

Patient Name:	Ashish, Test		Alert: YES SEELCTI	ON FOR HIGH 101	Nurse:	
Visit Date:	11/12/2020	Alert Time: 12:23:10 AM			Coordinator: Test 123	
isit Start Time:	12:15	I	Priority: High		Caregiver: A.14_Fel	o, Caregiver
Visit End Time:		Alert	Status: Open			
Open Alerts:	YES ALERT FOR 100 CODE	NO SEELCTION FOR H	HIGH 101 102 - NO	CRITICIAL ALERT NOTE FO	R 103 YES SEELCTION FO	R HIGH 101
otal Records (1	.) 🍠					
Date/Time Use	r 💉 Nurse	Assignee	Action Taken	Note		Status
1/12/2020 nagr 2:23:10	ajml • • •		No Action Taken	Alert cre (11/12/: Ashish@	ated and linked to Visit: [40 2020 0015-0030) for patient 123]	2866150] Open [EXQ-
New Note Action Taken:	Select	→ As	signee: Select	~	Note:	
Nurse:	Select	*	Status: Select	~		
			Copy Details	to Open Alerts: 🗸		

Open Alerts

Note: A **New Note** does not copy over to **Closed Alerts** for the same visit. Any **Closed Alerts** for the same visit display on a separate row underneath the **Open Alerts** row (not illustrated in the image above).



Care Insights Alert Timing

Care Insights alerts are generated when the call is received by the HHAX system rather than when the call is linked to a visit at Clock-Out (via Mobile App or IVR). This enhancement alerts selected personnel (nurses) sooner of potential issues.

Generated Alerts for all VBC Calls

The system has been enhanced for alerts to generate for all Care Insights calls, to include exception calls. On the Care Insights Alert Dashboard (*Action > Care Insights Alerts Dashboard*), select the **Include Unlinked Alerts** checkbox to include calls that have not yet been linked to a visit.

Alerts generated for unlinked calls are indicated an unlinked icon to the left of the alert icon (as seen in the image below).

Alerts - Search	1											
	Office(s):	All	•	Caregiver Team:	Select options	•	Patient Team:	Select options	~	Nurse:	Select options	~
	Status:	2 options selected	~	Caregiver Location:	Select options	v P	atient Location:	Select options	~	Coordinator:	Select options	~
	* Priority:	All	~	Patient Name:			* From Date:	10/12/2020		* To Date:	11/11/2020	
	Assignee:	Select options	¥	Include Unlinked Alerts:	2							
						Search						
Alerts												
Search Results ((88)										Page 1 of	4 <u>Next_Last</u>
Priority	Received	Time Elapsed (dd:hh:mm:ss)	Alert			Patient	Coordinator	Caregiver	Nurse	Assignee	Alert Status	
Informational (VBC)	11/11/2020 12:20:37	0:16:30:53	CRITICIAL ALE	RT NOTE FOR 103				1.11,780,120100.00			In Progress	×3
Moderate (VBC)	11/11/2020 12:20:37	0:16:30:53	102 - NO					111,760,1000000			In Progress	×8
Critical (VBC) 🌔	11/11/2020 12:20:37	0:16:30:53	YES ALERT FO	R 100 CODE				1.11,760. Unregion			In Progress	×3
Critical (VBC) 🚺	11/11/2020 12:20:37	0:16:30:53	NO SEELCTION	FOR HIGH 101				1.11,765.101000.00			In Progress	8 R
Critical (VBC) 🌗	11/10/2020 09:26:07	1:07:25:24	NO SEELCTION	FOR HIGH 101		Ashish, Test	Test 123	1.11,760. Unregion			In Progress	ľ
Critical (VBC) 🚺	11/10/2020 09:26:07	1:07:25:24	102 - YES			Ashish, Test	Test 123	111,760,1010000			In Progress	ľ
Critical (VBC) 🚺	11/10/2020 09:26:07	1:07:25:24	YES ALERT FO	R 100 CODE		Ashish, Test	Test 123				In Progress	ľ

Care Insights Alert Dashboard

Note: Unliked alerts are filtered based on the **Office** selected when generating a search using the **Office** search filed.

Default Note Alert Changes

The Care Insights alerts now include more information describing the details when an alert is generated (rather than an empty alert note). The alert now includes the Patient **Admission ID**, **Visit ID**, **Visit Date**, **Start Time**, **End Time**, and whether a call is *linked* or *unlinked* (as seen in the image below).



Patient Name: ROY, Job Case 1		Alert: This is moderate duty 101(Yes)				Nurse:			
Visit D	ate: 10/08/2020		Ale	ert Time: 07:48:01 A	М	(Coordinator: Albert Noble		
Visit Start T	ime: 06:15			Priority: Moderate	Caregiver: Alan, Joh			ison	
Visit End T	ime: 07:47		Aler	t Status: Open					
Open Alerts:	This is modera	te duty 101(Yes)							
Closed Alerts:	100 EXQ NO	102 NO							
Total Recor	ds (4)								
Date/Time	User	Nurse	Assignee	Action Taken		Note	Unlinked	Status	
10/08/2020 07:48:01	EVV			No Action Taken		Unlinked alert patient [333-9	created for an <mark>unkown visit</mark> for 900020598538118]	Open	
10/08/2020 07:51:52	shekhussp			No Action Taken	Linked	Alert created (10/08/2020 90002059853	and linked to Visit: [206643973] 0615-0630) for patient [333- 8118]	Open	
10/08/2020	shekhussp					Open to close	d	Closed	٦

Linked and Unlinked Care Insights Alert Notes

Once a visit (with a Care Insights alert) is linked via the Call Dashboard, the Care Insights alert is also updated with applicable information such as **Patient Demographics**, **Visit Details**, **Caregiver Details** and **Nurse**. The alert is marked as <u>linked</u> in the note with **Visit ID**, **Visit Date** and **Times**, and Patient **Admission ID**.



Updates to the Care Insights Feature

DISCLAIMER

All Care Insight features (to include the Care Insights BI Dashboard) are activated by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

As of February 2021, the system was updated to reflect various changes ranging from permissions to field label updates subsequent to the renaming of the feature, from *Value Based Care (VBC)* to *Care Insights*. Each subsection below provides details of each update. Note that all labels, menus, and fields have been changed to appear as **Care Insights** (formerly *Value Based Care*, or *VBC*) throughout the system.

Added Care Insights Permissions

There are two new role permissions titled *Add/Edit Care Insights Questions* and *Show/Hide Care Insights in the Patient Profile* allowing users to manage and view Care Insights duties in the system. The *Care Insights Alert Dashboard* allows users to view the Care Insights Alert Dashboard.

To manage these permissions, navigate to the *Edit Roles* page (*Admin > User Management > Edit Roles*) and select the applicable **Section** field (refer to the table below).

Permission	Allows
Care Insights Alert Dashboard	View and manage Care Insights alerts on the Care Insights Alert Dash board. This permission is enabled under the Action section.
Add/Edit Care Insights Ques-	Add or edit a Care Insights alert in the Duty List window. This per- mission is enabled in the Admin section, under the <i>Duty List Setup</i> category.
tions	Duty List Setup
	Add/Edit Care Insights Questions
Show/Hide Care Insights in	Control the display of Care Insights links in the Patient profile. This
the Patient Profile	permission is enabled in the Patient section.



Permission	Allows				
	Certification	<u>И</u>			
	AddCertification				
	EditCertification				
	DeleteCertification				
	Fax Order				
	Show/Hide Care Insights in the Patient Profile				

Labels, Menus, and Fields Renamed to Care Insights

All labels, menus, and fields have been changed to appear as **Care Insights** (formerly *Value Based Care*, or *VBC*) throughout the system. The following are some examples in various pages and windows.

In the *Patient Profile*, the left navigation index link now reads **Care Insights** and the headers and fields have been updated accordingly, as highlighted in the following image.



Patient Profile: Care Insights Updates

The *Edit Response* window also reflects updates in the window header, to read *Edit Care Insights Responses*, as seen in the image below.

s: RANI WALKE	R Office: Excellence Of	A Team Languages:
Responses	Edit Care Insights Responses - HHAeXchange	
ts Measure:	102 - Is Patient able to walk on his own alone?	Yes 🗸 🍵 To
	107 - Is Patient experiencing any digestion issues after dinner?	Yes 12/11/202 0645-0700 1t 0645-0647
able to walk or experiencing a	122 - Feeling Cold more often?	Yes V No
d more often?	Save Cancel	¥es
L L		

Edit Care Insights Responses Window



In the *Duty List Setup* (*Admin > Duty List Setup*), *Edit Duty* window, all field labels and info bubbles have been updated from Value Based Care to Care Insights, as highlighted in the following image.

HHA Exchange - Edit Duty	X
Edit Duty Histo	ory
* Duty Code: 10	
* Duty Name: this is testing found this is	
* Duty Category: Value Based Care 🗸	
Mobile Response Required: 🔲 🛈	
Status: Active 🗸	
Care Insight Setup	
If negative response, skip through duty: Select	L
If negative response, skip through duty	L
When a caregiver using IVR responds "No" or "Skip" for this duty, the system will skip to the next highest duty code after the value specified here.	
Priority Level: Critical V	

Edit Duty Window: Care Insights Setup Section

All Value Based Care references have also been updated on the alert dashboard feature to include the submenu label which now reads Care Insights Alert Dashboard (Action > Care Insights Alert Dashboard), as seen in the image below.



Action: Care Insights Alert Dashboard Submenu Label

The same applies to the Care Insights BI Dashboard (Dashboards > Care Insights Dashboard).



BI Dashboard: Care Insights Dashboard Submenu Label

On the *Caregiver Profile* page (*Caregiver > Caregiver Profile*), in the *Notification Preferences* section, the **Receive Care Insights Alert Email** field and info bubble has been updated.



	Notification Preferences								
Desformed contact Mathady									
Receive Care Insights Alert Email									
Selecting this checkbox prompts HHAeXchange associated with Patients assigned to the Caregiv	to send Care Insights Alert Emails to this caregiver. Emails are issued for alerts ver.								
	Receive Care Insights Alert No								

Caregiver Profile: Receive Care Insights Alert Email Field and Info Bubble

Lastly, the **Clinical Pathway On-Call User** checkbox field has been renamed to **Care Insights On Call User** in the *Edit User* page (*Admin > User Management > New/Search User*). Other applicable changes in this page include the respective info bubbles as well as *Office Setup* columns, as highlighted in the images below.

* First Name:	Charles .		IP Restricted	IP1:		IP2:	IP3:	1	
* Last Name:	1980 (BBC)		Hourly Restricted	Day From	То	IP 🛈			
Lorin Nane:		~~~~		M					
		÷		· • •					
Pending Placement Notifications:	☑ ①			Sun:					
Grant Access to Reporting Tool:				SSN#: 123-	12-3123] ① <u>H</u>			
Care Insights On-Call User. 2 ① Fail schedule (8.9. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX									
On Call for Selected Alert P If your agency is enabled with access to the Care Insights functionality, selecting this checkbox will allow the user to be schedules for on-call emails related to Care Insights Alerts. Users will receive On Call Alerts for their primary office only.									
Placents									
Office Setup								Add	
Office	Is Coordinator	View Open Cases for () Vie	w Care Insig	ts Alerts for	(1) Can	Override OT Limit Prim	ary	
Vidula QA 10.0 🔻	0				View Care I Automatically coordinator, n	nsights Alerts for sort alerts on the Care I urse, or assignee.	nsights Dashboard based o	n the selected	

Edit User Page: Updated Fields for Care Insights

Note: The Caregiver Mobile App still refers to Care Insights as Value Based Care. Updates are in progress for near future releases.