



Care Insights Process Guide

Provider and User Guide

Contents

Care Insights	1
Overview	1
HHAX System Key Terms and Definitions	1
Creating/Editing Care Insights (VBC Measures)	3
Patient POC	6
POC (Linked Contract Patients)	6
Associating the POC to a Visit	7
Completing VBC Questions	8
Mobile App	8
Mobile Notes Required	10
IVR (EVV via Phone)	11
Patient’s Care Insights Measures Page	13
Mobile App Notes On Patient Care Insights Page	14
Care Insights Alert Dashboard	16
Managing Care Insights Alerts	18
Adding Alert Notes	18
Value Based Care Action Taken Reference Table	19
Permissions	19
Copy Note Details to Other Open Alerts for the Same Visit	20
Care Insights Open Alert	20
Copying Open Alerts for the Same Visit	21
Care Insights Alert Timing	22
Generated Alerts for all VBC Calls	22
Default Note Alert Changes	22
Updates to the Care Insights Feature	24
Added Care Insights Permissions	24
Labels, Menus, and Fields Renamed to Care Insights	25

Care Insights

Overview

DISCLAIMER

This feature is activated by HHAX System Administration. Please contact [HHAX Support Team](#) 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 [HHAExchange Customer 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.

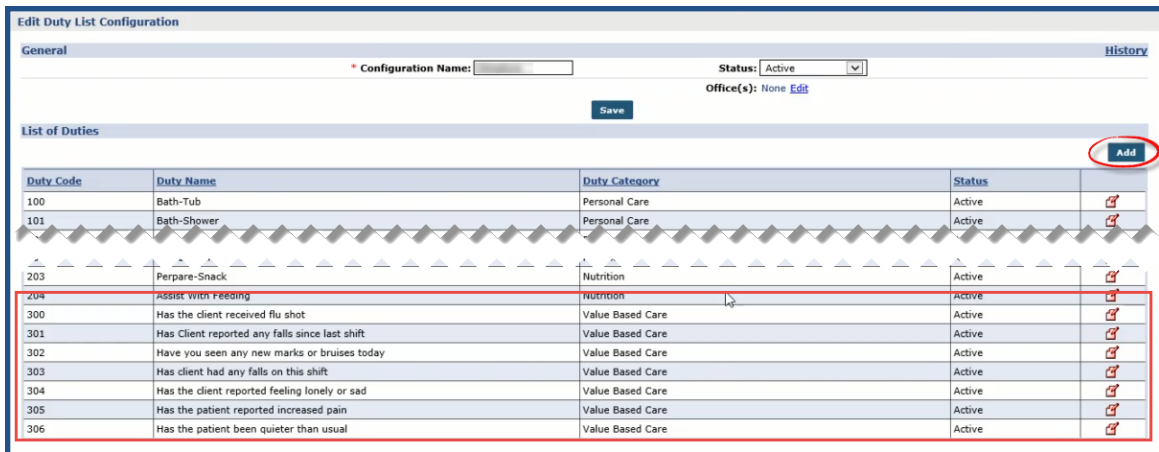
HHAX System Key Terms and Definitions

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 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

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.



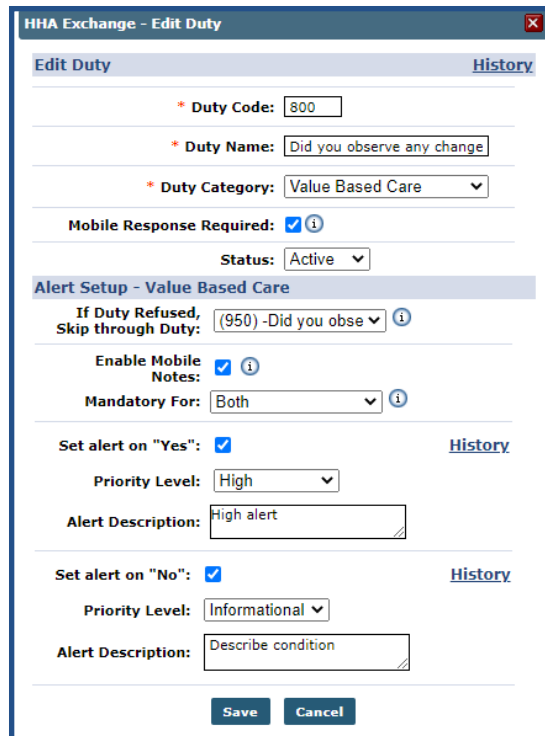
Value Based Care Duties

Note: Duties cannot be deleted from the Duty List; only edited by clicking on the editing icon (🔧) 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.

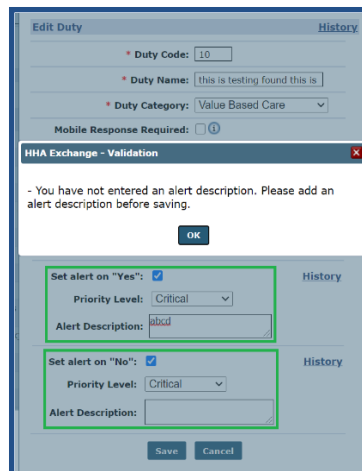


Adding a VBC Duty

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). Note: This Duty Name is presented 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 window 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 Mobile App section. Note: If selected for a Duty, then the Caregiver must respond Yes or No to Clock Out successfully.
Status	Select <i>Active</i> 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</i> , <i>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 Mobile Notes Required 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.

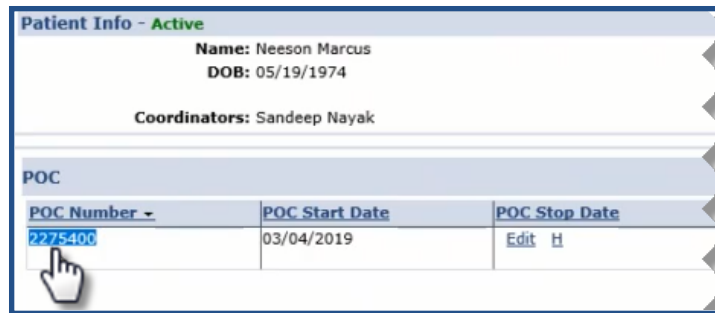


Alert Description Validation

Patient POC

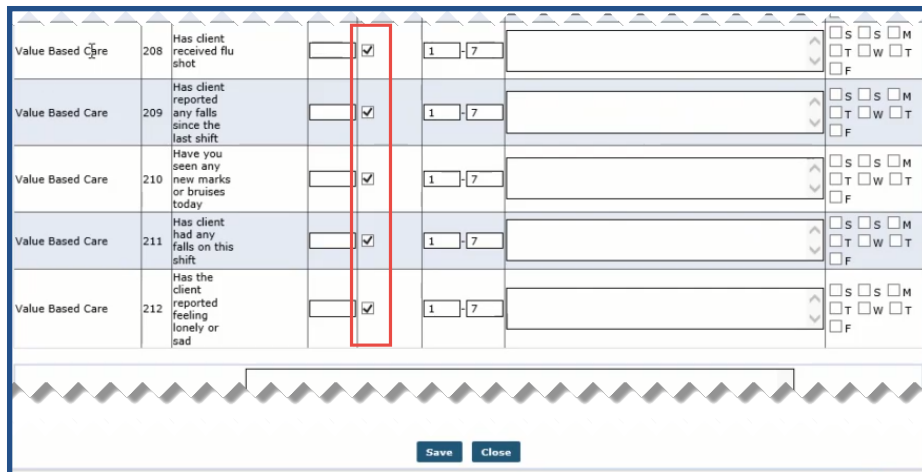
Once added to the Duty List, the Value Based Care Measures are made available to select in the Patient's POC.

Navigate to the *Patient* > *POC* page and click on the [POC Number](#) link to open the POC Duty List.



Patient 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).

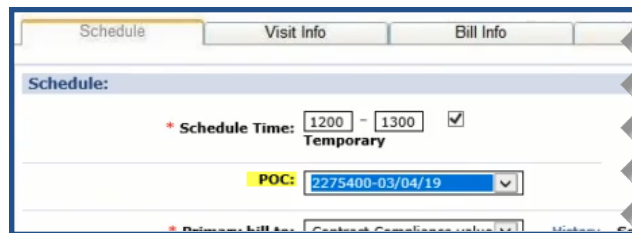
Category	Task #	Duty	As Requested	Times a Week (Min) - (Max)
Personal Care	1	1 Number	<input checked="" type="checkbox"/>	1 -
Value Based Care	100(605)	Is patient health in good condition today?(Is patient quieter than usual)	<input checked="" type="checkbox"/>	1 -
Value Based Care	101	Is patient able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

Linked Contract Patient: POC

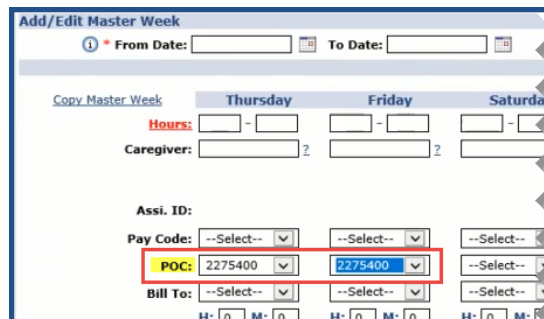
If there is no mapped Provider Duty, then only the Payer Duty Code and Name displays.

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 Tab: Select POC



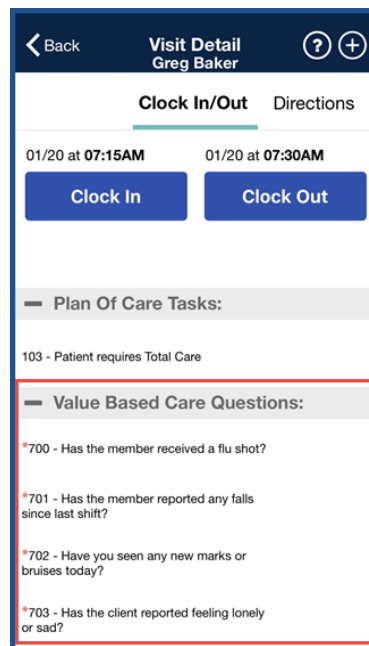
Master Week: Select POC

Completing VBC Questions

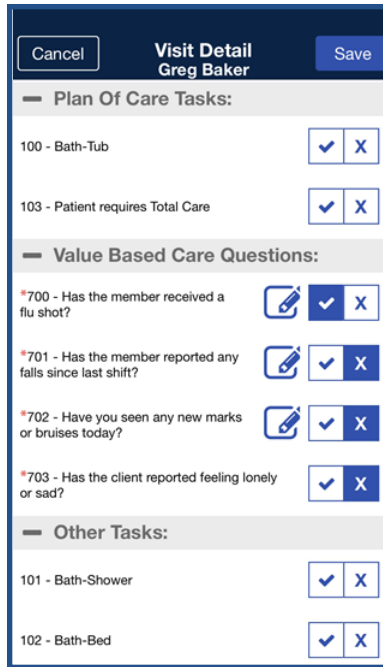
Mobile App

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:

*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

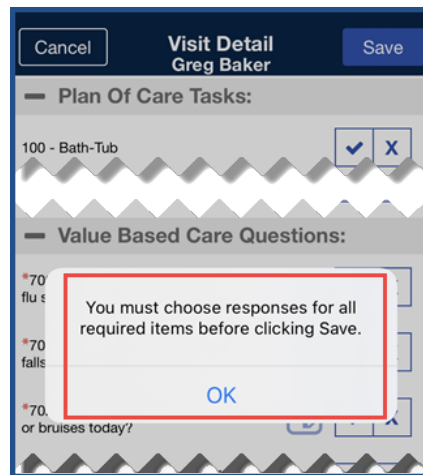
Other Tasks:

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.



Cancel Visit Detail Greg Baker Save

Plan Of Care Tasks:

100 - Bath-Tub ✓ X

Value Based Care Questions:

*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

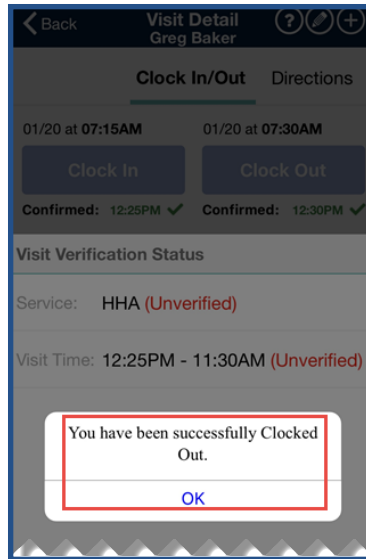
102 - Bath-Bed ✓ X

You must choose responses for all required items before clicking Save.

OK

Required Response

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

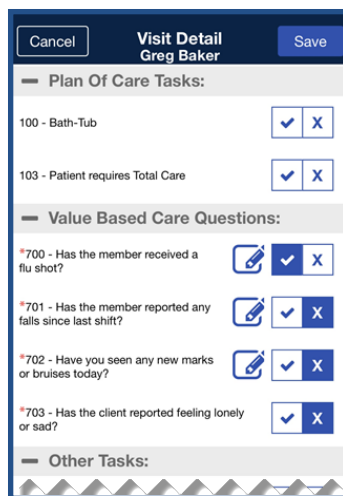


Successful Clock Out

Mobile Notes Required

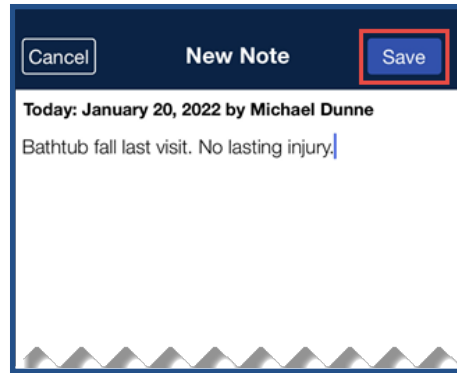
When **Mobile Notes** (Observations) are required (as configured in the *Duty List Setup*), the VBC Questions appear on the Mobile App requiring responses (denoted by red asterisks) when the Caregiver performs a Clock Out for a visit.

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.



VBC Questions

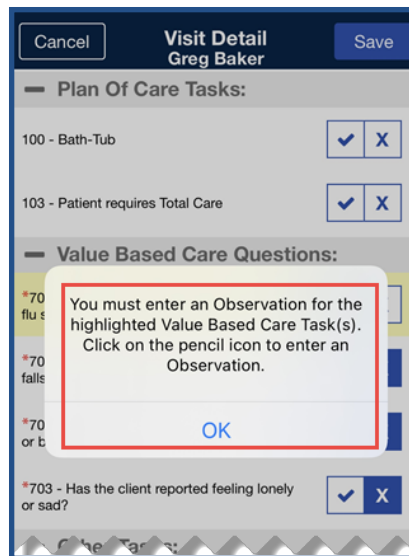
To complete, the Caregiver clicks on the pencil icon, enters the note, and clicks **Save**, as seen in the following image.



New Note

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.



Alert: Response Required

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 <i>continue</i> 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 applicable 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).

Measure	Date Scheduled	11/18/2019 1200-1300	11/11/2019 1200-1230	11/07/2019 1200-1330	10/26/2019 0700-0930	10/25/2019 0700-0930	10/24/2019 0700-0930	10/23/2019 0100-0300
208 - Has client received flu shot	Confirmed	Yes	N/A	N/A	N/A	N/A	N/A	Yes
209 - Has client reported any falls since the last shift		No	N/A	N/A	N/A	N/A	N/A	Yes
210 - Have you seen any new marks or bruises today		No	N/A	N/A	N/A	N/A	N/A	Yes
211 - Has client had any falls on this shift		No	N/A	N/A	N/A	N/A	N/A	N/A
212 - Has the client reported feeling lonely or sad		Yes	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.

Measure	01/03/2020 0900-1000	12/06/2019 0100-0200	10/26/2019 0300-0400	10/24/2019 0300-0600	10/23/2019 0100-0200
100(C05) - Is patient quieter than usual	No	N/A	N/A	N/A	N/A
101 - Is patient able to stand alone	No	N/A	N/A	N/A	N/A
102 - How is patient's behavior after brain surgery oper	No	N/A	N/A	N/A	N/A
203 - Value based Care	N/A	N/A	N/A	N/A	N/A
803 - Value Based 3	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(C01) - Has client received flu shot	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
907 - VBC code mapped	N/A	N/A	N/A	N/A	N/A
998(C03) - Have you seen any new marks or bruises today	No	N/A	N/A	N/A	N/A
999(C03) - Has client had any falls on this shift	No	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	11/18/2019 1200-1300
Confirmed	1200-1300 Edit
	Yes
	No
	No
	No
	Yes

Confirmed

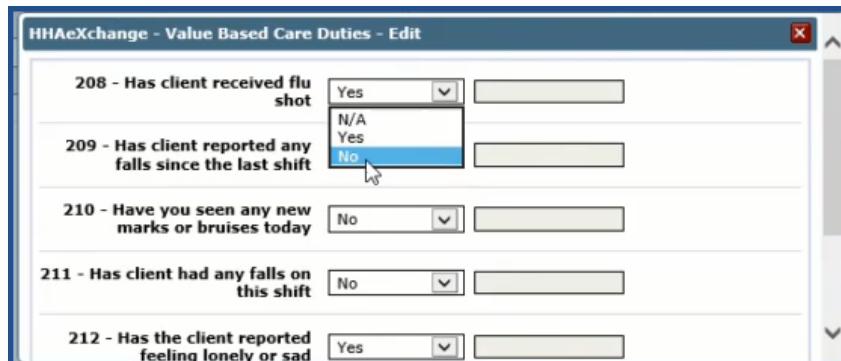


Unconfirmed

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	11/18/2019	11,
cheduled	1200-1300	120
irmed	1200-1300	120
	Yes	N/A
	No	N/A
	No	N/A

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



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 Measures					
Value Based Measure: All		From:			
Search results(49)					
Measure	Date Scheduled	10/16/2020 0730-0745	10/16/2020 0800-0815	10/15/2020 1030-1045	10/14/2020 0215-0230
102 - Is Patient able to walk on his own alone?	Confirmed	0730-0741	0800-0828	0800-0828	1030-1045
102 - Is Patient able to walk on his own alone?		Yes	Yes	Yes	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).

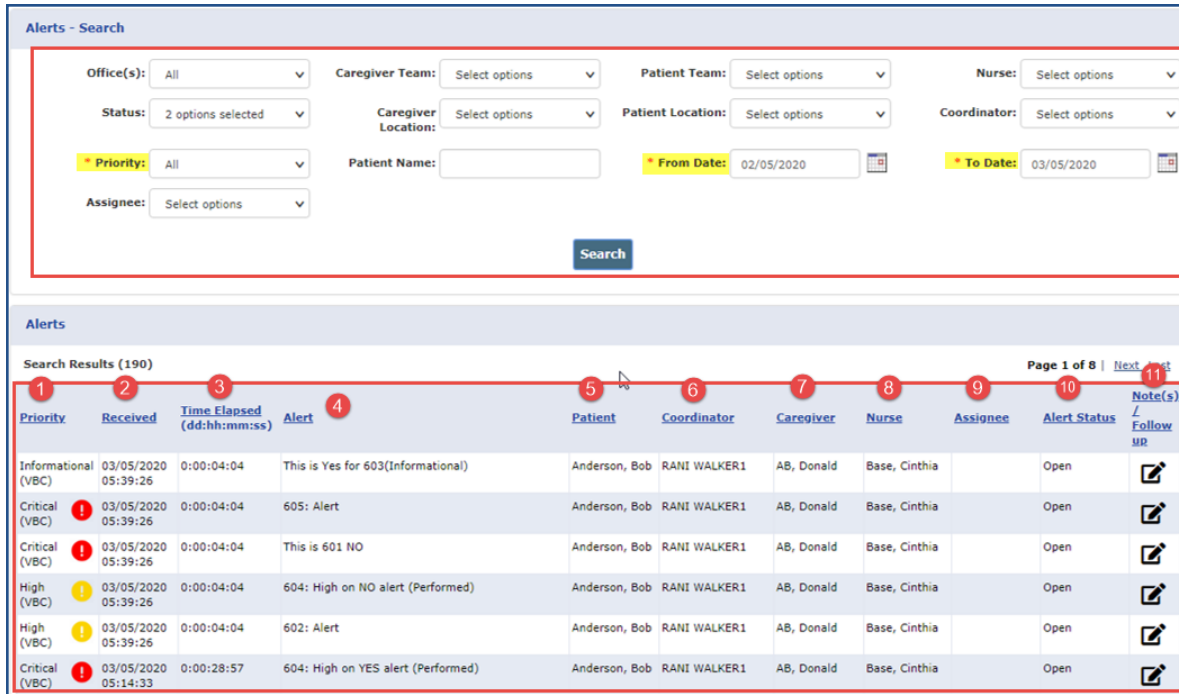
Value Based Measures					
Value Based Measure: All		From:			
Search results(49)					
Measure	Date Scheduled	10/16/2020 0730-0745	10/16/2020 0800-0815	10/15/2020 1030-1045	10/14/2020 0215-0230
102 - Is Patient able to walk on his own alone?	Confirmed	0730-0741	0800-0828	0800-0828	1030-1045
102 - Is Patient able to walk on his own alone?		Yes	Yes	Yes	No
107 - Is Patient experiencing any digestion issues after dinner?		Yes	Yes		No
122 - Feeling Cold more often?		Yes	No		No

Is Patient able to walk on his own alone?
This is Sample Note 1

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).





The screenshot shows the 'Alerts - Search' interface. At the top, there are several search filter fields: Office(s), Caregiver Team, Patient Team, Nurse, Status, Caregiver Location, Patient Location, Coordinator, Priority, Patient Name, From Date, To Date, and Assignee. A 'Search' button is located below these filters. Below the search filters is a table titled 'Alerts' with 'Search Results (190)' and 'Page 1 of 8'. The table has columns for Priority, Received, Time Elapsed, Alert, Patient, Coordinator, Caregiver, Nurse, Assignee, Alert Status, and Note(s). The table contains several rows of alert data, including Informational, Critical, and High priority alerts.

Priority	Received	Time Elapsed (dd:hh:mm:ss)	Alert	Patient	Coordinator	Caregiver	Nurse	Assignee	Alert Status	Note(s) / Follow Up
Informational (VBC)	03/05/2020 05:39:26	0:00:04:04	This is Yes for 603(Informational)	Anderson, Bob	RANI WALKER1	AB, Donald	Base, Cinthia		Open	
Critical (VBC)	03/05/2020 05:39:26	0:00:04:04	605: Alert	Anderson, Bob	RANI WALKER1	AB, Donald	Base, Cinthia		Open	
Critical (VBC)	03/05/2020 05:39:26	0:00:04:04	This is 601 NO	Anderson, Bob	RANI WALKER1	AB, Donald	Base, Cinthia		Open	
High (VBC)	03/05/2020 05:39:26	0:00:04:04	604: High on NO alert (Performed)	Anderson, Bob	RANI WALKER1	AB, Donald	Base, Cinthia		Open	
High (VBC)	03/05/2020 05:39:26	0:00:04:04	602: Alert	Anderson, Bob	RANI WALKER1	AB, Donald	Base, Cinthia		Open	
Critical (VBC)	03/05/2020 05:14:33	0:00:28:57	604: High on YES alert (Performed)	Anderson, Bob	RANI WALKER1	AB, Donald	Base, Cinthia		Open	

Care Insights Alert Dashboard

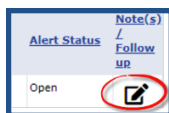
Use the Search filter fields to narrow searches by *Office, Teams, Status*, and other available fields. The **Priority** field as well as the **From/To Date** fields are required (denoted with a red asterisk) to generate a search. The **Assignee** field lists all users (roles) with permissions to the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

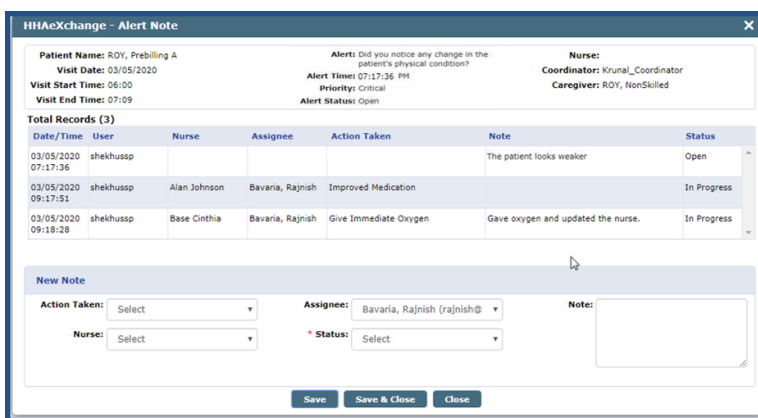
Column	Description
1	<p>Priority</p> <p>The alert priority is system-generated based on the Duty Setup for a VBC at the time of Clock-Out, as follows:</p> <ul style="list-style-type: none"> • Critical: Red alert icon ; requires immediate attention • High: Yellow alert icon ; requires attention • Moderate: Non-emergency; may require monitoring • Informational: Used for informational purposes <p><i>Note: Changing the duty alert priority does not change the generated (initial) alert priority.</i></p>
2	<p>Received</p> <p>Indicates when the message was generated and received in the system.</p>
3	<p>Time Elapsed</p> <p>Indicates the time that has lapsed between the received time and the time of the search.</p>
4	<p>Alert</p> <p>The alert description as defined in on the Duty Alert Setup</p>
5	<p>Patient</p> <p>The Patient for whom the alert is applicable</p>
6	<p>Coordinator</p> <p>The Patient's Coordinator</p>
7	<p>Caregiver</p> <p>The Caregiver for the visit</p>
8	<p>Nurse</p> <p>The Patient's Nurse</p>
9	<p>Assignee</p> <p>Select one or more Assignees. The Assignee filter field is populated with Active Users who have the <i>Care Insights Alert Dashboard</i> permission enabled for the Patient's Office.</p>
10	<p>Alert Status</p> <p>Current Status of the alert: Open, In-Progress, or Closed</p>
11	<p>Notes/Follow-up</p> <p>Icon (link) used to manage the alert. Refer to the next section.</p>

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).



Care Insights Alert Note

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

Adding Alert Notes

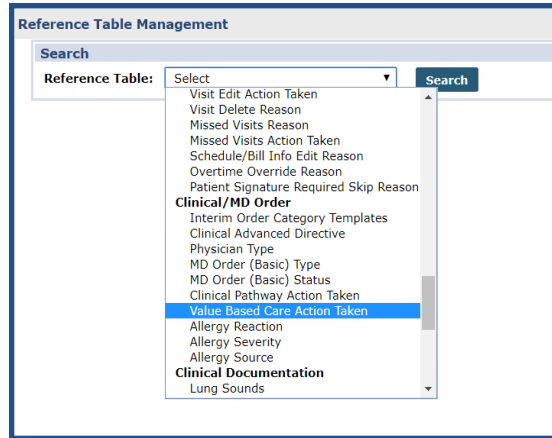
To add a *New Note*, select the applicable fields, described in the following table.

Field	Description
Action Taken	Select the action to be taken. These values are created via the Reference Table Management function. Refer to the Value Based Care Action Taken Reference Table 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

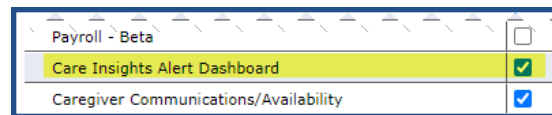
Alert Note dropdown fields are created and managed in the **Value Based Care Action Taken Reference Table** (**Admin > Reference Table Management**), under the *Clinical/MD Order* category.



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

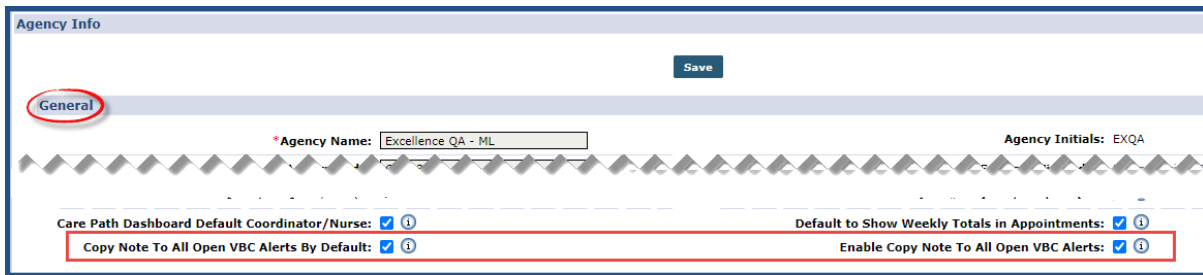
Refer to the [Added Care Insights Permissions](#) section for further details on newly added permissions.

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):

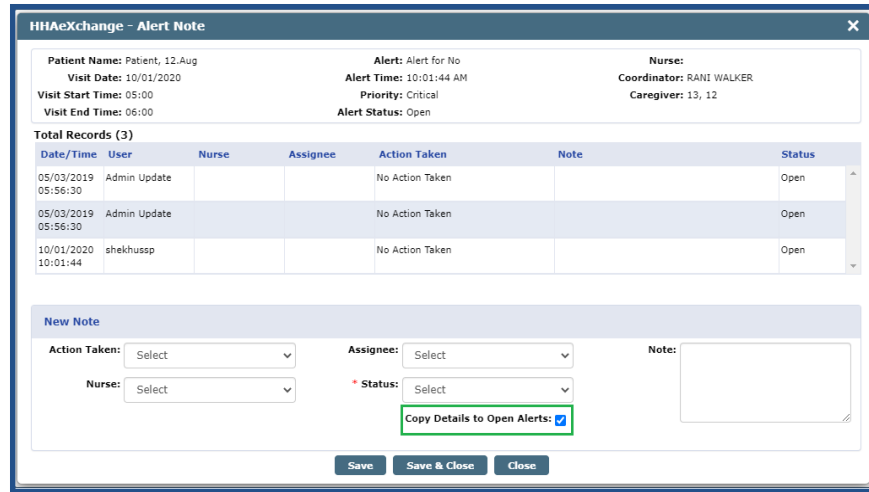


Agency Profile: VBC Alert Fields

Select	To...
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

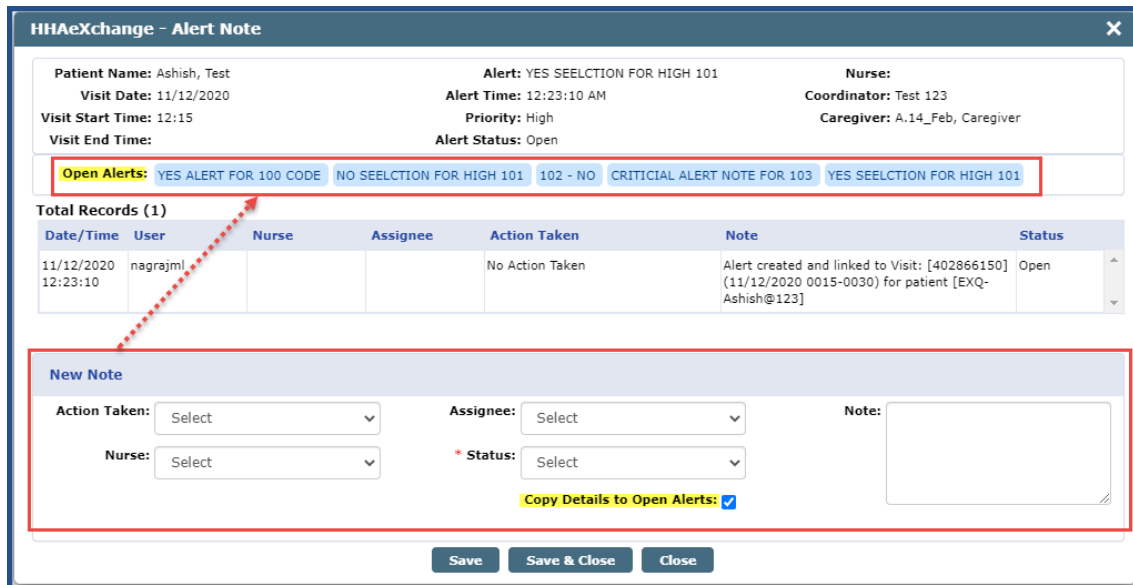
Once the feature is enabled, a **Copy Details to Open Alerts** checkbox appears on an opened Alert Note (as seen in the image below), allowing a user to copy responses to all other open alerts for a visit. When saved, the Note details (such as **Nurse**, **Assignee**, **Action Taken**, **Note**, and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



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.



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).

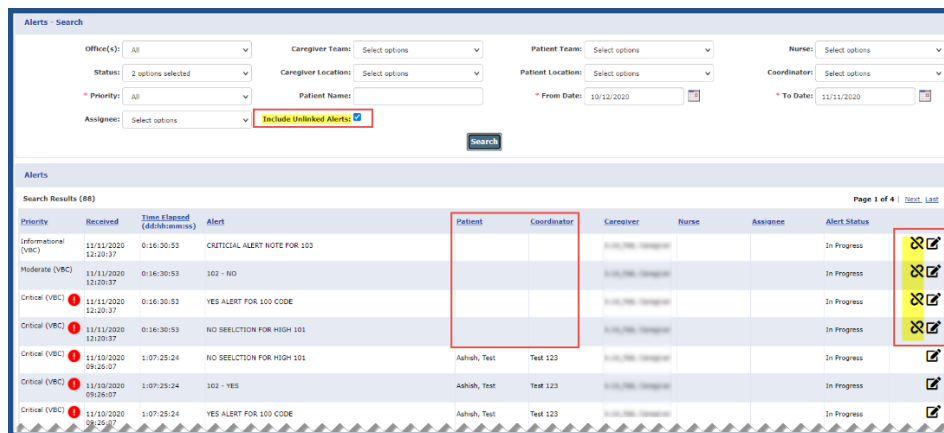
Care Insights Alert Timing

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).



Care Insights Alert Dashboard

Note: Unlinked 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).

HHAExchange - Alert Note						
Patient Name: ROY, Job Case 1		Alert: This is moderate duty 101(Yes)		Nurse:		
Visit Date: 10/08/2020		Alert Time: 07:48:01 AM		Coordinator: Albert Noble		
Visit Start Time: 06:15		Priority: Moderate		Caregiver: Alan, Johnson		
Visit End Time: 07:47		Alert Status: Open				
Open Alerts: This is moderate duty 101(Yes)						
Closed Alerts: 100 EXQ NO 102 NO						
Total Records (4)						
Date/Time	User	Nurse	Assignee	Action Taken	Note	Status
10/08/2020 07:48:01	EVV			No Action Taken	Unlinked alert created for an unknown visit for patient [333-900020598538118]	Open
10/08/2020 07:51:52	shekhussp			No Action Taken	Alert created and linked to Visit: [206643973] (10/08/2020 0615-0630) for patient [333-900020598538118]	Open
10/08/2020 09:30:05	shekhussp				Open to closed	Closed

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 *linked* in the note with **Visit ID**, **Visit Date** and **Times**, and Patient **Admission ID**.

Updates to the Care Insights Feature

DISCLAIMER

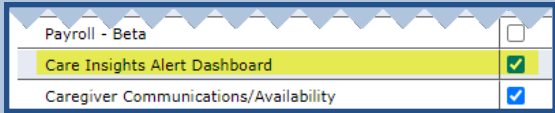
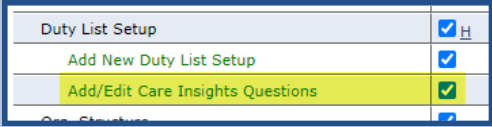
All Care Insight features (to include the Care Insights BI Dashboard) are activated by HHAX System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

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).

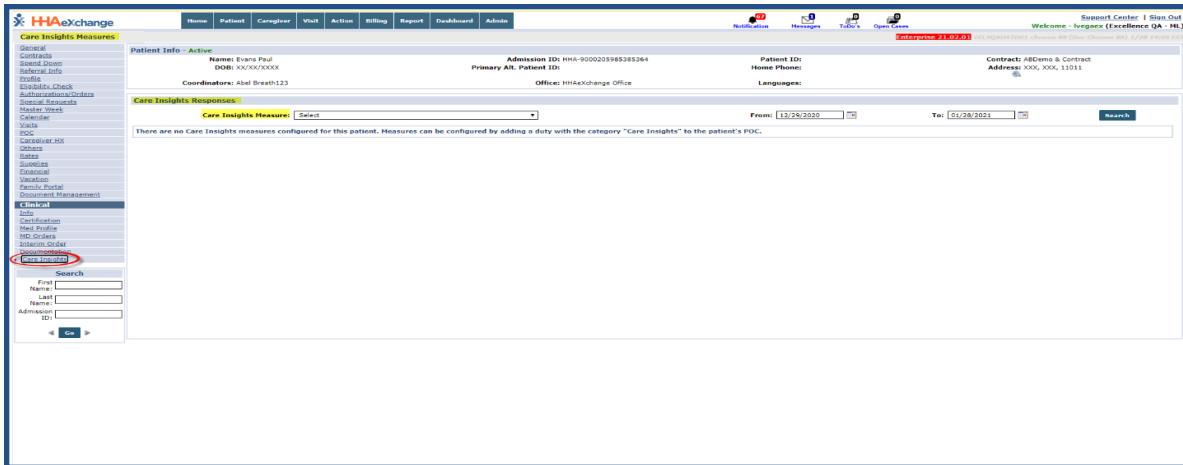
Permission	Allows
Care Insights Alert Dashboard	View and manage Care Insights alerts on the Care Insights Alert Dashboard. This permission is enabled under the Action section. <div style="border: 1px solid #002060; padding: 5px; margin: 10px 0;">  </div>
Add/Edit Care Insights Questions	Add or edit a Care Insights alert in the Duty List window. This permission is enabled in the Admin section, under the <i>Duty List Setup</i> category. <div style="border: 1px solid #002060; padding: 5px; margin: 10px 0;">  </div>
Show/Hide Care Insights in the Patient Profile	Control the display of Care Insights links in the Patient profile. This permission is enabled in the Patient section.

Permission	Allows												
	<table border="1"> <tr> <td>Certification</td> <td><input checked="" type="checkbox"/> H</td> </tr> <tr> <td>AddCertification</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>EditCertification</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>DeleteCertification</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Fax Order</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Show/Hide Care Insights in the Patient Profile</td> <td><input checked="" type="checkbox"/></td> </tr> </table>	Certification	<input checked="" type="checkbox"/> H	AddCertification	<input checked="" type="checkbox"/>	EditCertification	<input checked="" type="checkbox"/>	DeleteCertification	<input checked="" type="checkbox"/>	Fax Order	<input checked="" type="checkbox"/>	Show/Hide Care Insights in the Patient Profile	<input checked="" type="checkbox"/>
Certification	<input checked="" type="checkbox"/> H												
AddCertification	<input checked="" type="checkbox"/>												
EditCertification	<input checked="" type="checkbox"/>												
DeleteCertification	<input checked="" type="checkbox"/>												
Fax Order	<input checked="" type="checkbox"/>												
Show/Hide Care Insights in the Patient Profile	<input checked="" type="checkbox"/>												

Labels, Menus, and Fields Renamed to Care Insights

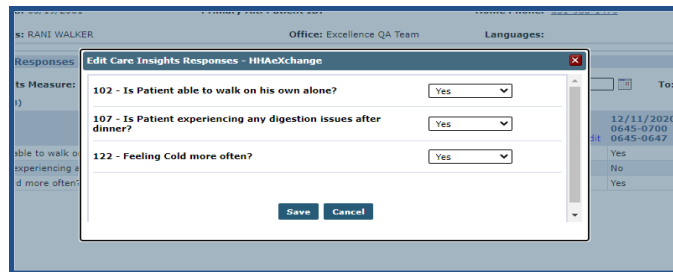
All labels, menus, and fields have been changed to appear as **Care Insights** (formerly *Value Based Care*, or *VBC*) throughout the system. The following are some examples in various pages and windows.

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.



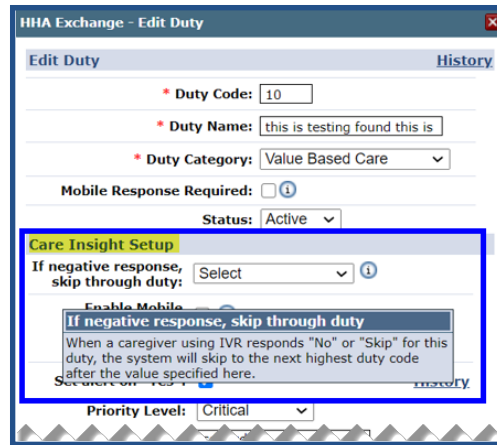
Patient Profile: Care Insights Updates

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



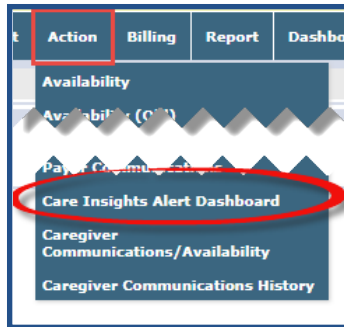
Edit Care Insights Responses Window

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.



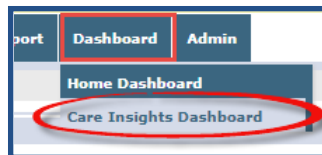
Edit Duty Window: Care Insights Setup Section

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.



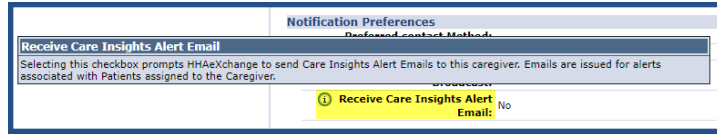
Action: Care Insights Alert Dashboard Submenu Label

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



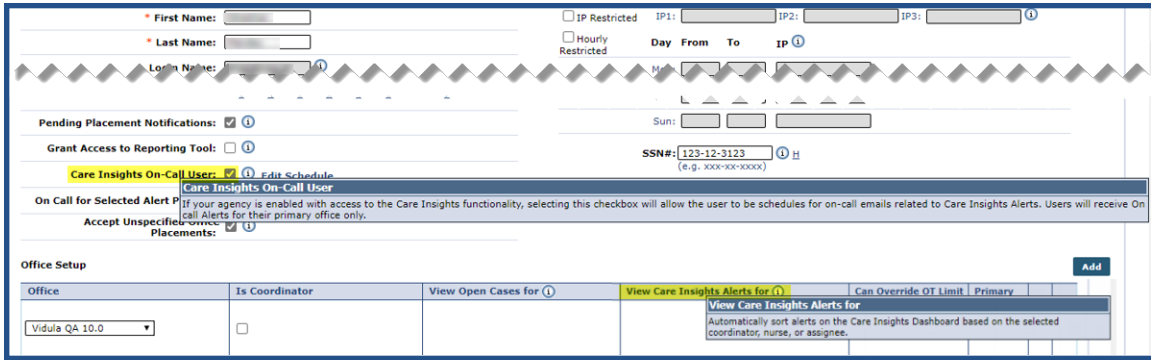
BI Dashboard: Care Insights Dashboard Submenu Label

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.



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.



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.