



Caregiver Management Process Guide

Entering and Managing Caregivers

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Caregiver Management

Overview

In HHAExchange (HHAX), the term **Caregiver** refers to any individual who provides service to a Patient. Depending on the type of service provided, Caregivers are categorized in the system as either Non-Skilled (or Non-licensed) or Skilled (Licensed, medical practitioners) employees.

All Caregiver information, such as Demographics, Compliance Status, and Restrictions, are housed in the **Caregiver Profile**. Users with the proper permissions may review and edit this information as required. New **Caregiver Profiles** may be entered manually or imported via a compatible third-party software.

This category covers the entry of new Caregivers as well as the creation and conversion of **Trainees** into Caregivers.

Please direct any questions, comments, or concerns regarding the content herein to [HHAExchange Client Support](#).

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

Employment Types

Employment Type, Discipline, or Accepted Service (on the Member’s side) refers to the type of service a Caregiver is authorized to provide in HHAX. The Caregiver’s **Employment Type** is a scheduling criterion used in **Authorizations** to ensure that a Member receives proper service.

The **Employment Type** is a required field when creating a **New Caregiver** (discussed later in this document). A Caregiver who does not match the **Discipline** specified in an **Authorization** cannot be scheduled, unless it is a Skilled Caregiver being scheduled for a Non-Skilled visit. Selecting one or more of the values in this field indicates that the Caregiver is certified to work in that capacity. The following is a comprehensive Employment Type list per Category (Skilled and Non-Skilled).

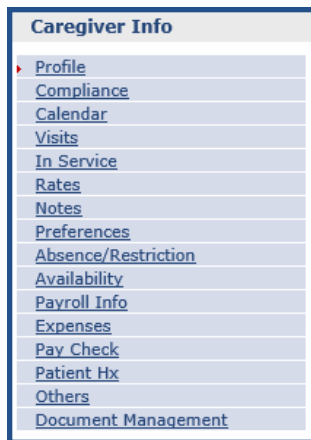
Skilled Caregivers	
Medical professionals who provide therapy or examinations to assess the Member’s state of wellbeing, to include:	
<ul style="list-style-type: none"> • LPN (Licensed Practical Nurse) • MSW (Medical Social Worker) • NINS (Nursing Instructor) • NT (Nutritionist) • OT (Occupational Therapist) • PT (Physical Therapist) 	<ul style="list-style-type: none"> • RN (Registered Nurse) • RT (Respiratory Therapist) • SCI (Service Coordinator – Initial) • SCM (Service Coordinator – Monthly Billing) • ST (Speech Therapist) • Other Skilled (Any other Skilled discipline)

Non-Skilled Caregivers	
Individuals who tend to a Member’s basic needs, observes and records their condition, and ensures that the Member receives help in a timely manner (in cases of emergency). Non-Skilled Employment Types include:	
<ul style="list-style-type: none"> • APC (Advanced Personal Care) • CBSA (Community Based Support Aide) • CH (Chore) • CNA (Certified Nursing Assistant) • COMP (Companion) • ESC (Escort) • HCSS (Home and Community Support Services) • HHA (Home Health Aide) • HMK (Homemaker) • HSK (Housekeeper) • ILST (Independent Life Skill Training) 	<ul style="list-style-type: none"> • PA (Personal Assistant) • PBIS (Positive Behavioral Intervention & Support) • PC (Personal Care) • PCA (Personal Care Assistant) • RESP (Respite) • SCH (Supportive Homecare Aid) • SDP (Structured Day Program) • SHHA (Supportive Home Health Aide) • SPC (Supportive Personal Care) • Other Non-Skilled (Any other Non-Skilled discipline)

The Caregiver Profile

The **Caregiver Profile** is used to manage Caregiver information. The Caregiver Profile has 16 permission-based pages to include the *Profile, Compliance, Calendar, Visits, In-Service* and numerous others (as illustrated on the image below).

Using the Index (left navigation section), users can navigate to different pages within the Caregiver's profile.



The Profile Page

The **Profile** page contains a Caregiver's *Demographics, Employment Information, Address, Emergency Contact Information, and Notification Preferences*. The top portion of the Profile shows the Caregiver's essential details to include Status.

The screenshot displays the 'Caregiver Profile Page' for a caregiver named Vee Veronica. The page is organized into several sections:

- Caregiver Info Active:** Name: Vee Veronica, Team: 888 Brickell Bay, Address: 888 Brickell Bay, MIAMI, FL 33133. Caregiver Code: LIS-1601, Vendor: Northeast Homecare Services, Languages: English, Italian, Spanish. Office: Lisset's Office, Phone: 02/01/1981, DOB: 02/01/1981, Caregiver Hours: H: 0, V: 0.
- Profile:** Includes links for Profile Log and Print Profile.
- Demographics:** First Name: Veronica, Last Name: Vee, Gender: FEMALE, Caregiver Code: LIS-1601, Ait. Caregiver Code: 888-88-8888, SSN#: 888-88-8888, Middle Name: VV, Initials: VV, DOB: 02/01/1981, Time & Att. PIN: 100601, Mobile ID Type, Mobile Device ID, Ethnicity, Country of Birth, Picture, and Secondary Offices.
- Employment Info:** Type: Employee H, Status: Active H, Reason, Notes, Employment Type: PCA, HHA, HSK, PA, HNK, Application Date: 01/03/2018, Hire Date, First Work Date, Last Work Date, HHA/PCA Registry Number, Referral Source, NYC Registry checks, Exclusion/Verification Lists Checked On, Employee ID, Team, Location, Branch, Payer, Added/Checked Registry Date, Referral Person, and Signed Payroll Agreement: No Date.
- Address:** Street 1: 888 Brickell Bay, Zip: 33133, State: FL, City: MIAMI, Home Phone, Phone 2, Phone 3.
- Emergency Contact Information:** Name, Address, Phone 2, Relationship, Phone 1.
- Notification Preferences:** Preferred contact Method: Mobile/Text Message, Mobile/Text Message: 786-888-8888, Email, Voice Message.

Caregiver Profile Page

Once the Caregiver Profile is created, a **Caregiver Code** and a **Time & Attendance PIN** (also referred to as an **Assignment ID**), defined as follows:

Field	Description
Caregiver Code	Primary reference number for the Caregiver in the HHAX system.
Time & Attendance PIN	The number the Caregiver uses when placing Electronic Visit Verifications (EVV).

Furthermore, users can add new information or edit existing details. An **Active** Status allows users to schedule Caregivers for service.

Read-Only Fields in Caregiver Profile Page

A number of Caregiver Profile fields (listed below) are read-only unless the user-role has been granted permission to edit and save.

- First Name
- Middle Name
- Last Name
- SSN#
- Gender
- Ethnicity
- DOB
- Alt. Caregiver Code
- Payroll Info Page*
- Hire Date

Note: The permission on the Payroll Info Page is **Save (rather than Edit). Therefore, a user can save edits on this page.*

To enable editing permissions for a user, navigate to **Admin > User Management > Edit Roles**. Select *Aide* from the **Section** dropdown field, and applicable roles from the **Roles** dropdown field. Scroll to the *Search Aid* category and enable applicable permissions.

The Compliance Page

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

Caregiver Compliance refers to work requirements set by Contracts and Agencies. Compliance requirements may include updated medical records, a clean Criminal Background Check, or proof of Certification. Depending on an Agency's settings, the HHAX system may block the Caregiver from being scheduled if a Compliance requirement is not fulfilled. In some case, the system warns the scheduler of the issue.

Refer to the [Caregiver Compliance Guide](#) to learn about the administration and management of this comprehensive piece and the numerous components that focus on each functionality based on Caregiver Discipline.

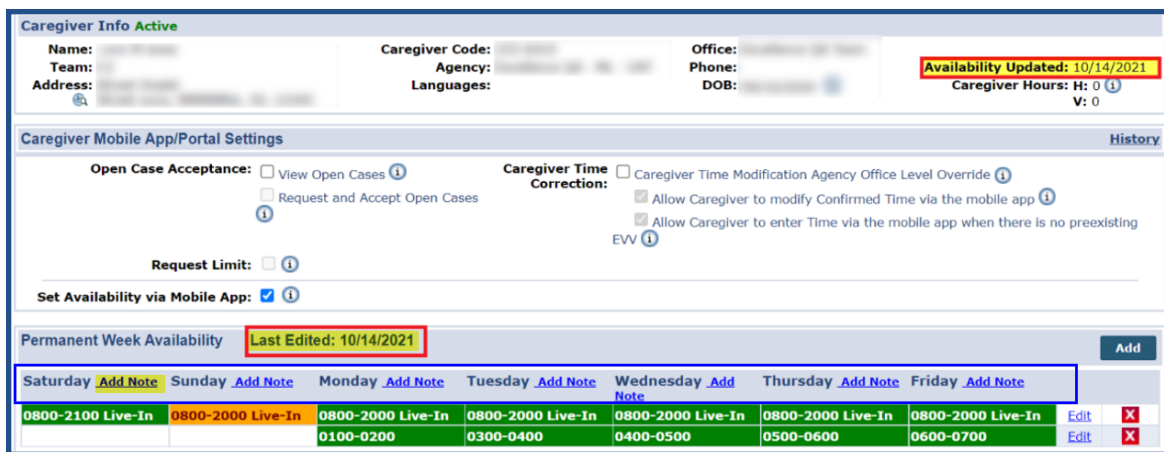
The Availability Page

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

The Caregiver **Availability** page is comprised of four sections: Mobile App Settings, Permanent Week Availability, Max Visits, and Special Availability.

An **Availability Updated** field in the *Caregiver Info* header section shows the date when the Caregiver’s availability was updated, in conjunction to the **Last Edited** field in the *Permanent Week Availability* section that indicates the date when the last changes were made to the selected Caregiver's Availability Preferences (as seen in the image below). The date captured in this label reflects when changes are made to the *Permanent Week Availability* and *Max Visits* sections.

In addition, use the Add Note links on a specific day to document the changes. Edit Note displays for days with an existing Note.

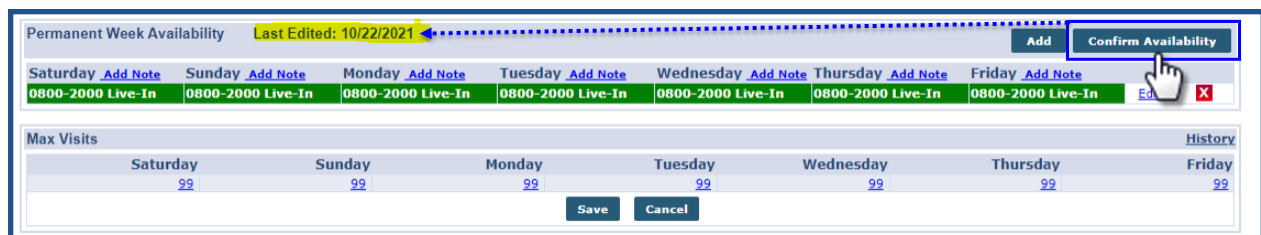


The screenshot shows the 'Caregiver Availability Page' with several sections:

- Caregiver Info Active:** Fields for Name, Team, Address, Caregiver Code, Agency, Languages, Office, Phone, and DOB. A red box highlights 'Availability Updated: 10/14/2021' and 'Caregiver Hours: H: 0 V: 0'.
- Caregiver Mobile App/Portal Settings:** Includes 'Open Case Acceptance' (View Open Cases, Request and Accept Open Cases), 'Request Limit', 'Set Availability via Mobile App' (checked), and 'Caregiver Time Correction' (Agency Office Level Override, Allow Caregiver to modify Confirmed Time via the mobile app, Allow Caregiver to enter Time via the mobile app when there is no preexisting EVV).
- Permanent Week Availability:** A table with columns for days of the week and time slots. A red box highlights 'Last Edited: 10/14/2021'. The table shows '0800-2100 Live-In' for Saturday and Sunday, and various time slots for Monday through Friday.

Caregiver Availability Page

A **Confirm Availability** button is also available in the *Permanent Week Availability* section to allow Providers to update the **Last Edited** date without editing the Caregiver’s availability. Once clicked, the **Last Edited** field is updated to reflect the date when changes were made.

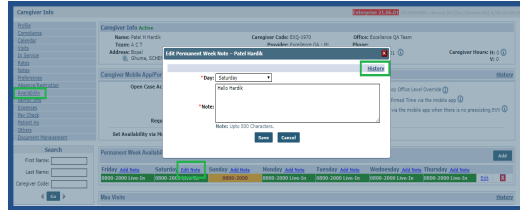


This screenshot focuses on the 'Permanent Week Availability' section, showing a table with columns for days of the week and time slots. A red box highlights the 'Confirm Availability' button in the top right corner of the table. The table shows '0800-2000 Live-In' for Saturday and Sunday, and various time slots for Monday through Friday. A mouse cursor is pointing at the 'Confirm Availability' button.

Confirm Availability Button

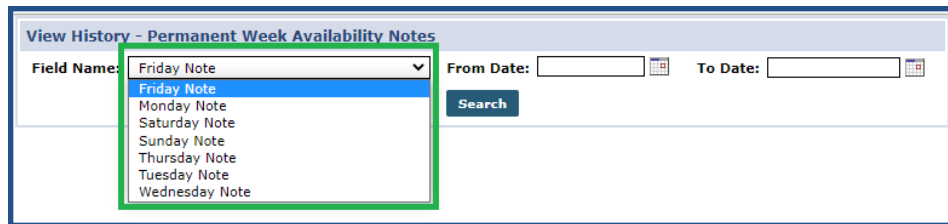
Availability Note History

In the *Edit Note* window, click on the [History](#) link to search and view history for a specific Note, as seen in the following images.



Permanent Week Note Window: History Link

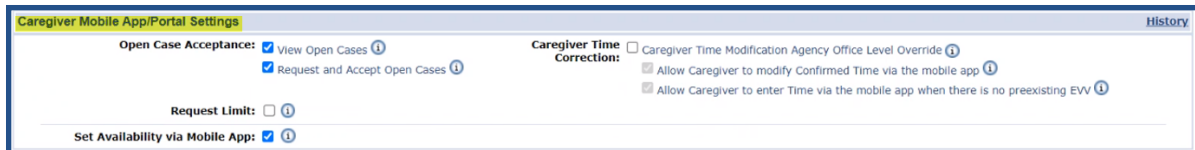
On the *View History* window, select a specific Day Note from the **Field Name** field and click **Search** to generate a search, as illustrated in the image below.



View History: Permanent Week Availability Notes Window

Mobile App Settings

The *Mobile App Settings* determine the behavior on the Caregiver’s mobile app; specifically, what they can view and what functions are available on their registered mobile device. For example, viewing and requesting shifts when an Agency broadcasts available shifts via the Case Broadcasting functionality. Agencies determine these settings as well as setting limits to the number of shifts a Caregiver can request. Agencies also determine if Caregivers can set their Availability via their mobile device.



Caregiver Mobile App Settings

Refer to the [Case Broadcasting category](#) for functionality details.

Permanent Week Availability

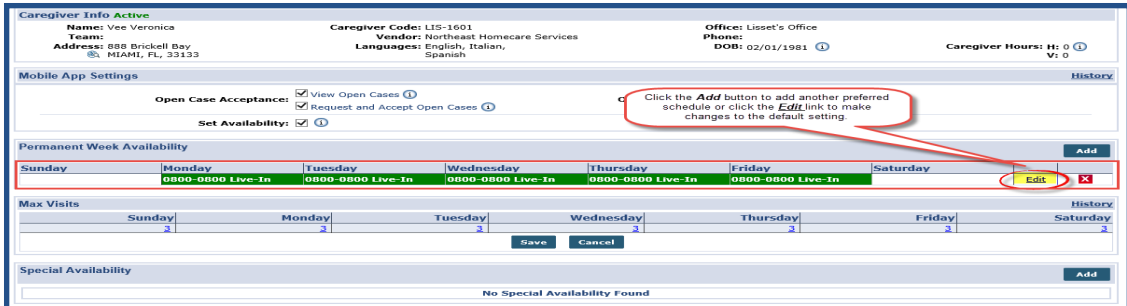
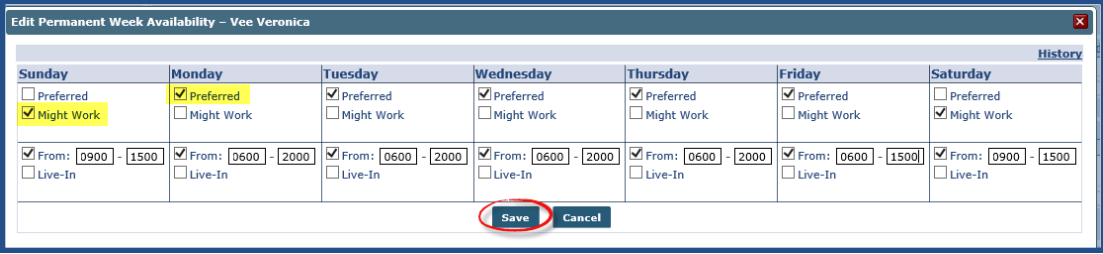
The *Permanent Week Availability* displays a Caregiver’s preferred schedule indicating the days, hours, and availability preferences. The settings indicated on this schedule facilitates the **Availability Search**

function when an Agency is trying to fill a shift or view general availability.

Permanent Week Availability Last Edited: 05/27/2021							Add
Sunday Add Note	Monday Add Note	Tuesday Add Note	Wednesday Add Note	Thursday Add Note	Friday Add Note	Saturday Add Note	
1200-1800	0800-2000	0800-2000	0800-2000	0800-2000	0800-2000	1200-1800	Edit X


Preferred/Might Work Hours

The following table provides instructions on adding or updating a Caregiver's *Permanent Week Availability*.

Step	Action
1	Navigate to Caregiver > Caregiver Search > Caregiver Profile > Availability .
2	<p>By default, a <i>Live-In</i> schedule is prepopulated. Either click the Add button to add an additional preferred availability schedule or click the Edit link on the existing (default) schedule.</p>  <p style="text-align: center;">Adding/Editing Permanent Week Availability</p> <p>Note: <i>Permanent Week Availability</i> schedules can be deleted by clicking the delete icon (X).</p>
3	<p>The <i>Edit Permanent Week Availability</i> screen appears providing various fields as shown.</p> <p>Select the Preferred and Might Work checkboxes per weekday a Caregiver prefers to work and which days they may work if required.</p> <p>Select the From checkbox and enter the hours in the text boxes provided to specify the hourly availability on each specific day. Select Live-In if the Caregiver is to work a <i>Live-In</i> shift.</p> <p>Leave blank any day(s) the Caregiver is not available to work.</p>  <p style="text-align: center;">Edit Permanent Week Availability</p>
4	Click the Save button to finalize.

Max Visits

Max Visits refers to the total amount of unique visits a Caregiver is willing to work on a given day. To set a value, click the link (number) under the day of the week and adjust (as shown below). Click the **Save** button to finalize.





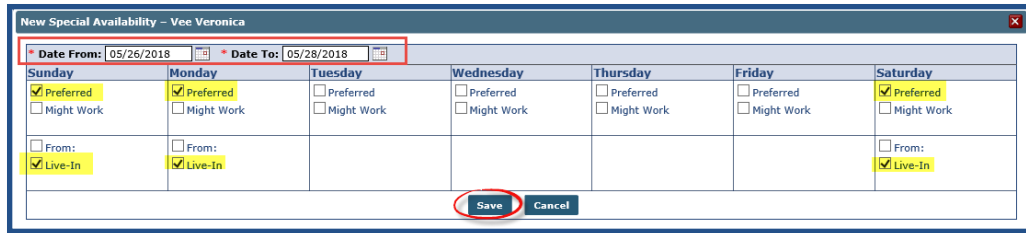
Max Visits							History
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
2	3	3	3	3	3	3	

Adjusting Max Visits

Special Availability

Special Availability works the same as Permanent Week Availability. A Special Availability schedule is created when the Caregiver’s schedule varies for a certain amount of time (such as holiday seasons). Follow the steps below to add a Special Availability schedule.

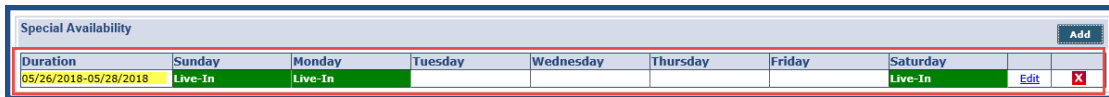
Step	Action
1	Navigate to Caregiver > Caregiver Search > Caregiver Profile > Availability .
2	<p>Navigate to the Special Availability section and click the Add button.</p>  <p style="text-align: center;">Adding Special Availability</p> <p>Note: Click the Edit link to edit Special Availability schedules (for existing schedules) or deleted by clicking delete icon ().</p>
3	<p>The New Special Availability screen appears providing various fields as shown. Select the date range, Date From/To (required, as denoted by the red asterisks). Select the Preferred and Might Work checkboxes per day to indicate the Caregiver availability for the selected period.</p> <p>Select the From checkbox and enter the hours in the text boxes provided to specify the hourly availability on each specific day. Select Live-In if the Caregiver can work a <i>Live-In</i> shift. Leave inapplicable days blank.</p>



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input checked="" type="checkbox"/> Preferred	<input checked="" type="checkbox"/> Preferred	<input type="checkbox"/> Preferred	<input type="checkbox"/> Preferred	<input type="checkbox"/> Preferred	<input type="checkbox"/> Preferred	<input checked="" type="checkbox"/> Preferred
<input type="checkbox"/> Might Work	<input type="checkbox"/> Might Work	<input type="checkbox"/> Might Work	<input type="checkbox"/> Might Work	<input type="checkbox"/> Might Work	<input type="checkbox"/> Might Work	<input type="checkbox"/> Might Work
<input type="checkbox"/> From:	<input type="checkbox"/> From:					<input type="checkbox"/> From:
<input checked="" type="checkbox"/> Live-In	<input checked="" type="checkbox"/> Live-In					<input checked="" type="checkbox"/> Live-In

New Special Availability

4 Click the **Save** button to finalize.



Duration	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
05/26/2018-05/28/2018	Live-In	Live-In					Live-In	Edit X

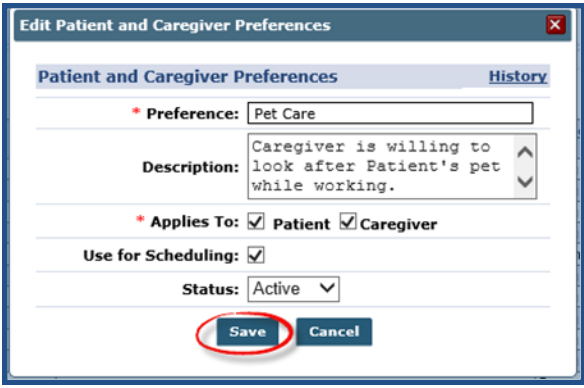
Special Availability set

The Preferences Page

The Caregiver **Preferences** page is comprised of two sections: *Caregiver Preferences (Used for Scheduling)* and *Caregiver Preferences (Not Used for Scheduling)*. This information serves as a scheduling tool to ensure Patients are comfortable receiving service from the Caregiver assigned to them. This section covers how to indicate a Caregiver’s preferences and how these preferences are used to schedule.

Reference Table Management - Adding Preferences

Before selecting specific Preferences, these preferences must be configured via the Reference Table Management functionality. Follow the steps below to add Caregiver Preferences.

Step	Action
1	Navigate to Admin > Reference Table Management .
2	Select <i>Patient and Caregiver Preferences</i> (under the General section) from the Reference Table field. Click Search to view the current preferences. Click the Add button to add a Preference.
3	<p>The <i>Add Patient and Caregiver Preferences</i> screen appears providing various fields as shown. Complete the required (denoted by red asterisks) and optional fields, as follows:</p> <ul style="list-style-type: none"> • Enter the Preference value in the Preference field. • In the Applies To field, determine whether the preference applies to <i>Patients, Caregivers</i>, or both. <ul style="list-style-type: none"> • Preferences set for only Patients or Caregivers are listed under the Not Used for Scheduling category. • The Use for Scheduling checkbox appears for Preferences applied to both. This setting is triggered when using the Caregiver Availability Search function. • Set the Status field to <i>Active</i>.  <p style="text-align: center;">Patient and Caregiver Preferences</p>
4	Click the Save button to finalize.

Setting a Caregiver's Preferences

Step	Action												
1	Navigate to <i>Caregiver > Caregiver Search > Caregiver Profile > Preferences.</i>												
2	<p>The <i>Caregiver Preferences</i> page opens. Select the applicable Preferences as added in the Reference Table.</p> <div data-bbox="293 535 1398 953" style="border: 1px solid #ccc; padding: 10px;"> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Caregiver Preferences: Used for Scheduling History</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td><input checked="" type="checkbox"/> Cooks</td> <td><input type="checkbox"/> English not primary</td> <td><input type="checkbox"/> Hoyer Lift</td> </tr> <tr> <td><input type="checkbox"/> Needs Cooking</td> <td><input checked="" type="checkbox"/> Owns cats</td> <td><input type="checkbox"/> Patient Home After 3PM</td> </tr> <tr> <td><input type="checkbox"/> Peanut Allergy</td> <td><input checked="" type="checkbox"/> Pet Care</td> <td><input type="checkbox"/> Smoking</td> </tr> </table> <p style="text-align: center;"> Language 1: <input type="text" value="English"/> Language 2: <input type="text" value="Italian"/> Language 3: <input type="text" value="Spanish"/> Language 4: <input type="text" value="Select"/> </p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Caregiver Preferences: Not Used for Scheduling</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> Drives Car</td> <td><input type="checkbox"/> English Primary Language</td> <td><input type="checkbox"/> Owns dog</td> </tr> </table> <p>Other: <input style="width: 100%;" type="text"/> <small>(Upto 250 Characters)</small></p> <p style="text-align: center;">Save</p> </div> </div> <p style="text-align: center;">Caregiver Preference Page</p> <p>Note: The values in the Patient Preferences: Used for Scheduling section on both pages are identical. For example, if both a Patient and a Caregiver have the English Primary Language (under Used for Scheduling) preference selected, they are paired when conducting an <i>Availability Search</i>.</p>	<input checked="" type="checkbox"/> Cooks	<input type="checkbox"/> English not primary	<input type="checkbox"/> Hoyer Lift	<input type="checkbox"/> Needs Cooking	<input checked="" type="checkbox"/> Owns cats	<input type="checkbox"/> Patient Home After 3PM	<input type="checkbox"/> Peanut Allergy	<input checked="" type="checkbox"/> Pet Care	<input type="checkbox"/> Smoking	<input type="checkbox"/> Drives Car	<input type="checkbox"/> English Primary Language	<input type="checkbox"/> Owns dog
<input checked="" type="checkbox"/> Cooks	<input type="checkbox"/> English not primary	<input type="checkbox"/> Hoyer Lift											
<input type="checkbox"/> Needs Cooking	<input checked="" type="checkbox"/> Owns cats	<input type="checkbox"/> Patient Home After 3PM											
<input type="checkbox"/> Peanut Allergy	<input checked="" type="checkbox"/> Pet Care	<input type="checkbox"/> Smoking											
<input type="checkbox"/> Drives Car	<input type="checkbox"/> English Primary Language	<input type="checkbox"/> Owns dog											
3	Click the Save button to finalize.												

Note: The *Special Requests* page in the Patient Profile is identical to the Caregiver *Preferences* page.

The Absence/Restriction Page

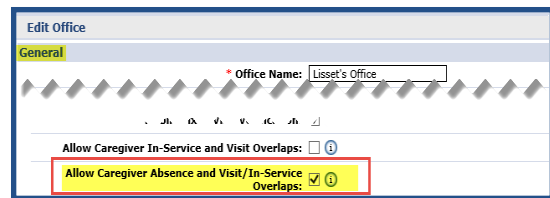
Tip: You can press **Ctrl-F** on your keyboard to search this topic.

The Caregiver **Absence/Restriction** page is comprised of three sections: *Absences*, *Paid Time Off Accruals*, and *Restricted*. This information is used to track a Caregiver’s absences, paid time off (PTO) balances, or restrictions keeping a Caregiver from getting scheduled. This section covers how to add an **Absence**, how to designate an absence as **PTO**, and how to restrict a Caregiver from working with a specific Patient or Payer/Contract.

Absences

The **Absence** function is used to record and track a Caregiver’s absences and paid time off (PTO) balances.

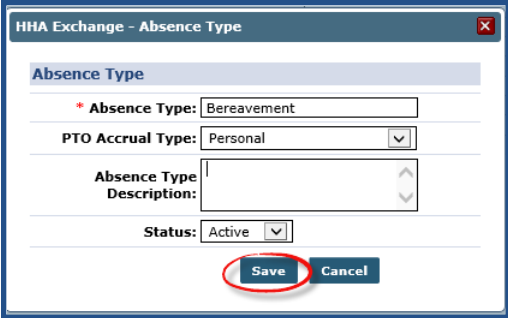
Note: Some Agencies allow the scheduling of absent Caregivers. Check the Agency settings (**Admin > Office Setup > Search Office > Edit Office**) to enable/disable the **Allow Caregiver Absence and Visit / In Service Overlaps** field.



Reference Table Management - Adding Absence Reasons


Before selecting specific Absence reasons, these options must be configured via the Reference Table Management functionality. Follow the steps below to add Absence reasons.

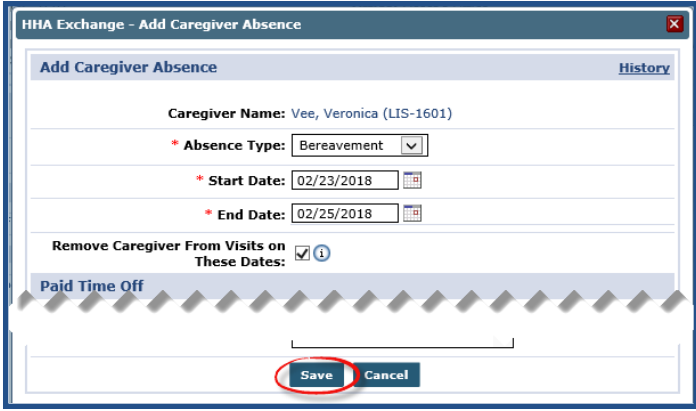
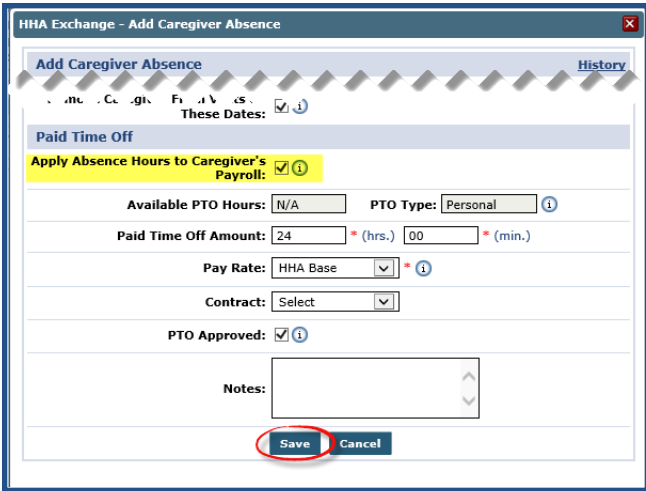
Step	Action
1	Navigate to Admin > Reference Table Management .
2	Select <i>Caregiver Absence Type</i> (under the Caregiver section) from the Reference Table field. Click Search to view the current options. Click the Add button to add a Preference.
3	<p>The <i>Absence Type</i> window appears providing various fields as shown. Complete the required (denoted by red asterisks) and optional fields, as follows:</p> <ol style="list-style-type: none"> 1. Enter the Absence value in the Absence field. 2. Select the PTO Accrual Type (Bonus, Personal, Sick Leave, or Vacation). 3. Enter a Description (optional). 4. Ensure the Status field is set to <i>Active</i>.

	 <p style="text-align: center;">Absence Type</p> <p><i>Note: Additional Caregiver PTO Accrual Types are created via the Reference Table Management functionality under the Caregiver PTO Accrual Type category.</i></p>
4	Click the Save button to finalize.

Entering a Caregiver Absence

Follow the steps below to add a Caregiver’s absence in the system.

Step	Action
1	Navigate to Caregiver > Caregiver Search > Caregiver Profile > Absence/Restriction .
2	Click the Add button in the Absences section. <div style="text-align: center; margin-top: 10px;">  <p style="text-align: center;">Add Caregiver Absence</p> </div>
3	The Caregiver Absence window opens indicating the Caregiver Name and Code. Complete the required fields (as denoted with a red asterisk). Select the Absence Type , Start Date , and End Date . Select the Remove Caregiver from Visits on these Dates checkbox to remove the Caregiver from any visits assigned on indicated dates.

Step	Action								
	 <p style="text-align: center;">New Absence</p>								
4	<p>Click the Save button to finalize OR proceed to the next steps to apply PTO to the absence.</p> <p>Note: If the selected Absence Type is linked to a Caregiver PTO Accrual Type, the Apply Absence Hours to Caregiver Payroll checkbox unlocks. If unavailable, the system alerts user with the following message: "Absence Type selected not configured for Paid Time off".</p>								
5	<p>Select the Apply Absence Hours to Caregiver's Payroll checkbox to apply PTO and complete the required fields (denoted with red asterisks) as described below.</p>  <p style="text-align: center;">Apply PTO to Absence</p> <table border="1" data-bbox="376 1703 1310 1944"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Paid Time Off Amount</td> <td>Enter the applicable PTO Hours and Minutes to apply.</td> </tr> <tr> <td>Pay Rate</td> <td>Pay Rate associated with the PTO.</td> </tr> <tr> <td>Contract</td> <td>Select only the PTO applies to a Contract; otherwise leave</td> </tr> </tbody> </table>	Field	Description	Paid Time Off Amount	Enter the applicable PTO Hours and Minutes to apply.	Pay Rate	Pay Rate associated with the PTO.	Contract	Select only the PTO applies to a Contract; otherwise leave
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Step	Action								
	<table border="1" data-bbox="378 627 1312 858"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td></td> <td>unselected.</td> </tr> <tr> <td>PTO Approval</td> <td>Select the checkbox to authorize the PTO. If left unselected, the PTO is not included in the next payroll.</td> </tr> <tr> <td>Notes</td> <td>Enter any applicable notes (optional).</td> </tr> </tbody> </table> <p data-bbox="261 896 1414 961">Note: The Available PTO Hours field is for reference purposes only indicating the PTO type selected and the balance of hours available.</p>	Field	Description		unselected.	PTO Approval	Select the checkbox to authorize the PTO. If left unselected, the PTO is not included in the next payroll.	Notes	Enter any applicable notes (optional).
Field	Description								
	unselected.								
PTO Approval	Select the checkbox to authorize the PTO. If left unselected, the PTO is not included in the next payroll.								
Notes	Enter any applicable notes (optional).								
6	Click the Save button to finalize.								

All **Absences** and **PTO** are displayed in the Caregiver *Absences* section where records can be reviewed, edited, or deleted.



Start Date	End Date	Absence Type	Incl. in PTO	PTO Amount	Pay Code	Contract	Status	Payroll Batch	Notes	Add
06/17/2016	06/18/2016	Vacation	Yes	08:00	HHA Base		Approved			Edit X
06/13/2016	06/14/2016	In Service	No				N/A			Edit X
06/02/2016	06/02/2016	Illness	No				N/A			Edit X

Absences Section

PTO Accrual

The *Paid Time Off Accruals* section is used to track a Caregiver’s PTO balances. This section is for reference purposes only, as illustrated in the image below and described in the table beneath.

Paid Time Off Accruals ⓘ					
Accrual Type	Accrued PTO Hours	Date of Last PTO Import	Pending PTO Hours	Available PTO Hours	
Sick Time	8:30	1/10/2015	0.00	8:30	View History
Personal Leave Time	16:00	1/10/2015	8.00	8:00	View History

PTO Tracking

Column	Description
Accrual Type	Values for these fields are generated using the Reference Table Management functionality. The Reference Table item “Caregiver PTO Accrual Type” designates different types of PTO.
Accrued PTO Hours	The amount of PTO hours the Caregiver has for each Accrual Type based on the imported payroll information.
Date of Last PTO Import	The date of the last data import from the Agency’s payroll provider.
Pending PTO Hours	The number of PTO hours that have been entered, but not yet included in payroll.
Available PTO Hours	The number of available PTO hours.




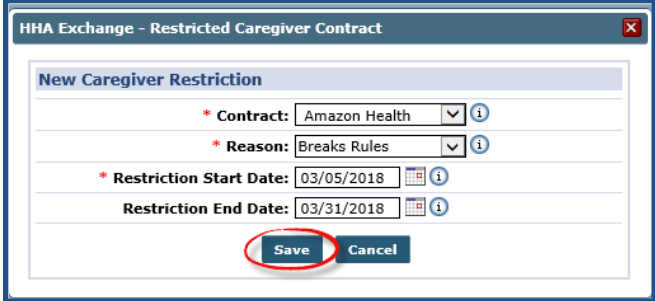
The **Paid Time Off Accruals** feature, or PTO function, is **NOT** an internal accrual tracking process. This function works by importing accrual information (sent by your Agency’s payroll provider) and applying it to the payroll tracking function in the system. HHAX is not responsible for the accuracy of payroll data originating from the 3rd party payroll provider.

Contact [HHAX Client Support](#) to activate the PTO function.

Restricted

The *Restricted* section is used to restrict a Caregiver from working with Patients under a specific Contract. Once a **Restriction** is placed, the Caregiver is removed from non-billed visits and cannot be scheduled to new visits (throughout the duration of the restriction).

Follow the steps below to add a Caregiver **Restriction**.

Step	Action										
1	Navigate to <i>Caregiver > Caregiver Search > Caregiver Profile > Absence/Restriction</i> .										
2	<p>Click the New button in the <i>Restricted</i> section.</p>  <p style="text-align: center;">Add Caregiver Restriction</p>										
3	<p>The <i>Restricted Caregiver Contract</i> window opens. Complete the required fields (as denoted with a red asterisk), as described below.</p>  <p style="text-align: center;">New Restriction</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Contract</td> <td>Select the Contract barring the Caregiver from working a case(s).</td> </tr> <tr> <td>Reason</td> <td>Reason the Caregiver cannot work visits schedule by a Contract. <i>Note: Values for the Reason field are generated via the Reference Table Management function.</i></td> </tr> <tr> <td>Restriction Start Date</td> <td>Start date of the restriction.</td> </tr> <tr> <td>Restriction End Date</td> <td>End date of the restriction.</td> </tr> </tbody> </table>	Field	Description	Contract	Select the Contract barring the Caregiver from working a case(s).	Reason	Reason the Caregiver cannot work visits schedule by a Contract. <i>Note: Values for the Reason field are generated via the Reference Table Management function.</i>	Restriction Start Date	Start date of the restriction.	Restriction End Date	End date of the restriction.
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Restriction Start Date	Start date of the restriction.										
Restriction End Date	End date of the restriction.										
4	Click the Save button to finalize.										

All **Restrictions** can be reviewed, edited, and deleted in the *Restricted* section. Additional restrictions can be added by clicking the **New** button.



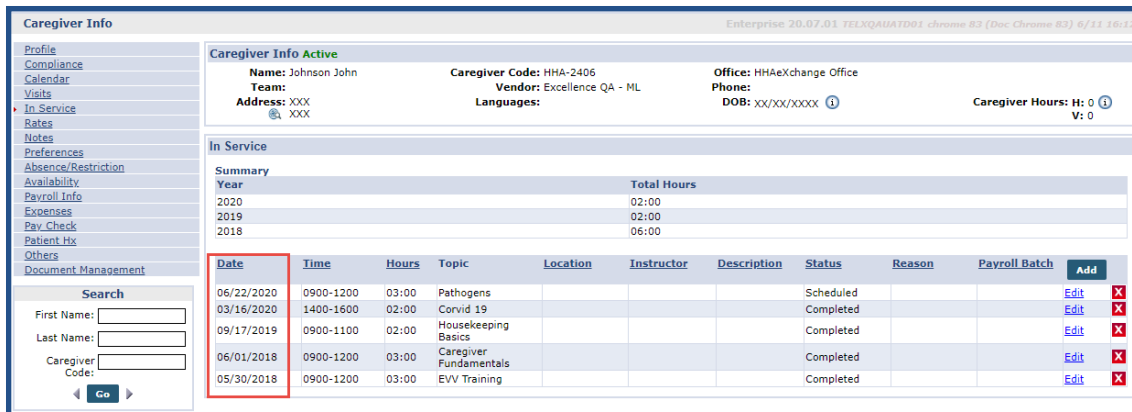
Start Date 5	End Date	Reason	Contract	Created		
03/05/2018	03/31/2018	Breaks Rules	Amazon Health	03/02/2018 16:45 PM (LissetV)	Edit	New

Caregiver Restricted

The In Services Page

The **In-Service** function allows Agencies to schedule Caregivers for training and meetings via the HHAX system. The *In Service* page is primarily used to schedule and track compliance related seminars in the system, as well as to prevent the Caregiver from being scheduled for Patient visits during a scheduled class.

The information in the *Caregiver In-Service* page (**Caregiver > In Service**) is sorted in ascending order with the most recent classes on top, as seen in the following image.



Caregiver In Service Page: Information in Ascending Order by Date

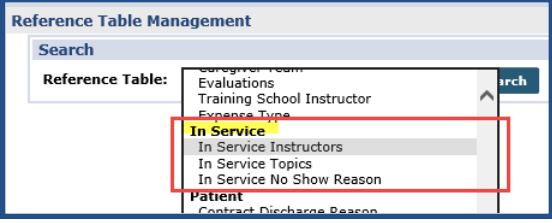
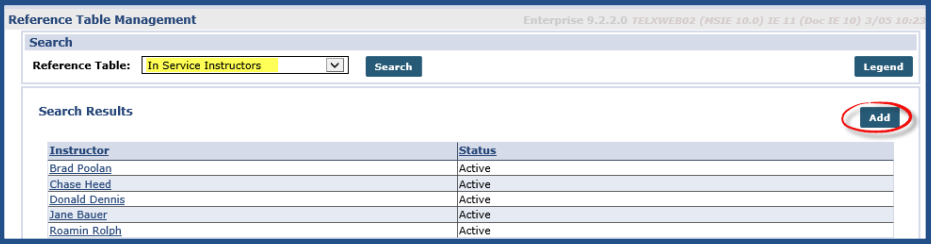
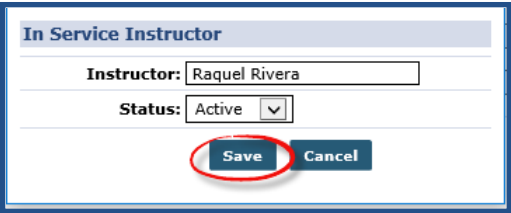
Reference Table Management - Adding In-Services

The following must be defined in the system before selecting specific In-Services:

Field	Description
Topic	the reason for the class (such as <i>CPR Training</i> or <i>Emergency Scenarios</i>).
In Service Instructor	The instructor(s) facilitating the training or seminar.
In Service No Show Reason	The reason a Caregiver did not attend an In Service.

Complete the following steps to add and manage the In-Services Reference Table.

Step	Action
1	Navigate to Admin > Reference Table Management .
2	Select the applicable topic from the In Service category (under the Caregiver/In-Service section) from the Reference Table field.

Step	Action
	 <p style="text-align: center;">In Service Reference Tables</p>
3	<p>Once selected, click Search to view the current options. Click the Add button to add a value.</p>  <p style="text-align: center;">Adding an In Service Instructor</p>
4	<p>The topic window opens. Complete the necessary fields and click the Save button to finalize.</p>  <p style="text-align: center;">Adding a New Instructor</p>

Scheduling an In Service

Complete the following steps to create an In Service event.

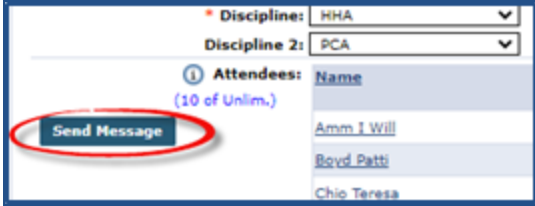
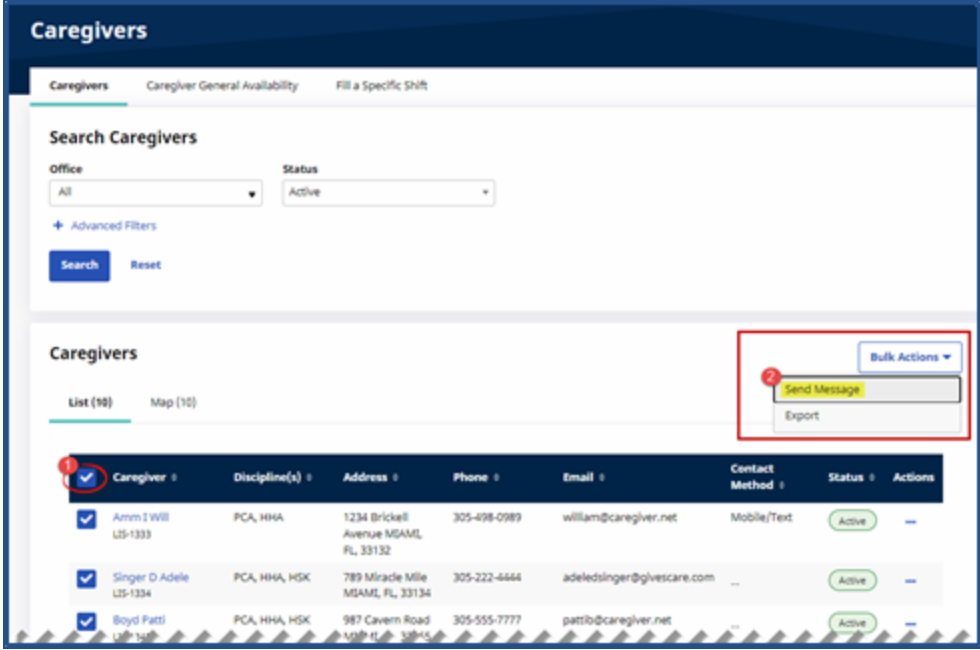
Step	Action
1	Navigate to Action > In Service > New .
2	The <i>New In Service</i> window opens. Complete the applicable fields as described under the image below. Fields denoted with red asterisks are required.




Step	Action																						
	<div data-bbox="289 302 1398 562"> </div> <p data-bbox="711 575 987 604" style="text-align: center;">Creating an In Service Event</p> <table border="1" data-bbox="321 621 1373 1419"> <thead> <tr> <th data-bbox="321 621 615 674">Field</th> <th data-bbox="615 621 1373 674">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="321 674 615 758">*Date</td> <td data-bbox="615 674 1373 758">(Required) The date of the In Service. Select if this event is a future (Scheduled) or past (Completed) event.</td> </tr> <tr> <td data-bbox="321 758 615 869">*Class Time</td> <td data-bbox="615 758 1373 869">(Required) The class Start and End times. <i>Note: The duration entered here is the value the system uses when processing Payroll for the In Service.</i></td> </tr> <tr> <td data-bbox="321 869 615 947">Max Attendees</td> <td data-bbox="615 869 1373 947">If applicable, limit the number of Caregivers that may be scheduled for the In Service.</td> </tr> <tr> <td data-bbox="321 947 615 1024">Allow for In Service Overlap</td> <td data-bbox="615 947 1373 1024">(Checkbox) When selected, Providers can schedule Caregivers for visits while attending an In-Service class.</td> </tr> <tr> <td data-bbox="321 1024 615 1083">*Topic</td> <td data-bbox="615 1024 1373 1083">(Required) Select the In Service topic(s) from the options.</td> </tr> <tr> <td data-bbox="321 1083 615 1142">Instructor</td> <td data-bbox="615 1083 1373 1142">Select the In Service facilitator/instructor.</td> </tr> <tr> <td data-bbox="321 1142 615 1220">*Discipline</td> <td data-bbox="615 1142 1373 1220">(Required) Select the applicable discipline for the In Service. Up to 2 disciplines can be scheduled for the In Service.</td> </tr> <tr> <td data-bbox="321 1220 615 1304">*Office</td> <td data-bbox="615 1220 1373 1304">(Required) Select the applicable Agency Office organizing the event.</td> </tr> <tr> <td data-bbox="321 1304 615 1362">Language</td> <td data-bbox="615 1304 1373 1362">Select the language(s) that the In Service is to be presented in.</td> </tr> <tr> <td data-bbox="321 1362 615 1419">*Pay Code</td> <td data-bbox="615 1362 1373 1419">(Required) Select the applicable Pay Code for the In Service.</td> </tr> </tbody> </table>	Field	Description	*Date	(Required) The date of the In Service. Select if this event is a future (Scheduled) or past (Completed) event.	*Class Time	(Required) The class Start and End times. <i>Note: The duration entered here is the value the system uses when processing Payroll for the In Service.</i>	Max Attendees	If applicable, limit the number of Caregivers that may be scheduled for the In Service.	Allow for In Service Overlap	(Checkbox) When selected, Providers can schedule Caregivers for visits while attending an In-Service class.	*Topic	(Required) Select the In Service topic(s) from the options.	Instructor	Select the In Service facilitator/instructor.	*Discipline	(Required) Select the applicable discipline for the In Service. Up to 2 disciplines can be scheduled for the In Service.	*Office	(Required) Select the applicable Agency Office organizing the event.	Language	Select the language(s) that the In Service is to be presented in.	*Pay Code	(Required) Select the applicable Pay Code for the In Service.
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<p data-bbox="217 1562 240 1591">3</p>	<p data-bbox="266 1465 1357 1495">Once the In Service details are entered, click the Add button to add Caregivers to the event.</p> <div data-bbox="282 1530 1409 1650"> </div> <p data-bbox="662 1667 1036 1696" style="text-align: center;">Add Caregivers to an In Service Event</p>																						
<p data-bbox="217 1738 240 1768">4</p>	<p data-bbox="266 1705 1403 1808">The <i>Caregiver Search</i> window opens. Generate a search to add applicable Caregivers. Select the Caregivers from the search results via the checkbox to the left of the Name. To select all in the results, select the checkbox at the column header (as shown in the image).</p>																						

Step	Action																																																																																																				
	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Caregiver Search</p> <p>Last Name: <input type="text"/> First Name: <input type="text"/> Office: <input type="text" value="All"/></p> <p>Phone Number: <input type="text"/> Caregiver Code: <input type="text"/> Alt. Caregiver Code: <input type="text"/></p> <p>Discipline: <input checked="" type="checkbox"/> PCA <input checked="" type="checkbox"/> HHA Employment Type: <input type="text" value="All"/> Status: <input type="text" value="All"/></p> <p style="text-align: center;"><input type="button" value="Search"/></p> <hr/> <p>Search Results (9)</p> <table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/></th> <th>Name</th> <th>Code</th> <th>Type</th> <th>Status</th> <th>Alt. Caregiver Code</th> <th>Date of Birth</th> <th>Phone</th> <th>Hours this Year</th> <th>Last InService</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/></td><td>Amm I Will</td><td>LIS-1333</td><td>Employee</td><td>Active</td><td></td><td>06/10/1970</td><td>305-555-6666</td><td></td><td>06/26/2017</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Boyd Patti</td><td>LIS-1345</td><td>Employee</td><td>Active</td><td></td><td>03/01/1960</td><td>305-777-5555</td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Chio Teresa</td><td>LIS-1600</td><td>Employee</td><td>Active</td><td></td><td>05/28/1980</td><td>305-305-3055</td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Karring Imma</td><td>LIS-1356</td><td>Employee</td><td>Active</td><td></td><td>08/30/1968</td><td></td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Kramer Miriam</td><td>LIS-1599</td><td>Employee</td><td>Active</td><td></td><td>08/22/1968</td><td></td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Lafleur Bianca</td><td>LIS-1350</td><td>Employee</td><td>Active</td><td></td><td>02/01/1970</td><td></td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Mark E Mark</td><td>LIS-1349</td><td>Employee</td><td>Active</td><td></td><td>10/01/1970</td><td>305-232-3232</td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Singer D Adele</td><td>LIS-1334</td><td>Employee</td><td>Active</td><td></td><td>05/04/1975</td><td>305-444-2222</td><td></td><td>06/26/2017</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Vee Veronica</td><td>LIS-1601</td><td>Employee</td><td>Active</td><td></td><td>02/01/1981</td><td></td><td>08:00</td><td>01/15/2018</td></tr> </tbody> </table> <p style="text-align: center;"><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p style="text-align: center;">Search/Select Caregivers</p>	<input checked="" type="checkbox"/>	Name	Code	Type	Status	Alt. Caregiver Code	Date of Birth	Phone	Hours this Year	Last InService	<input checked="" type="checkbox"/>	Amm I Will	LIS-1333	Employee	Active		06/10/1970	305-555-6666		06/26/2017	<input checked="" type="checkbox"/>	Boyd Patti	LIS-1345	Employee	Active		03/01/1960	305-777-5555			<input checked="" type="checkbox"/>	Chio Teresa	LIS-1600	Employee	Active		05/28/1980	305-305-3055			<input checked="" type="checkbox"/>	Karring Imma	LIS-1356	Employee	Active		08/30/1968				<input checked="" type="checkbox"/>	Kramer Miriam	LIS-1599	Employee	Active		08/22/1968				<input checked="" type="checkbox"/>	Lafleur Bianca	LIS-1350	Employee	Active		02/01/1970				<input checked="" type="checkbox"/>	Mark E Mark	LIS-1349	Employee	Active		10/01/1970	305-232-3232			<input checked="" type="checkbox"/>	Singer D Adele	LIS-1334	Employee	Active		05/04/1975	305-444-2222		06/26/2017	<input checked="" type="checkbox"/>	Vee Veronica	LIS-1601	Employee	Active		02/01/1981		08:00	01/15/2018
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<input checked="" type="checkbox"/>	Vee Veronica	LIS-1601	Employee	Active		02/01/1981		08:00	01/15/2018																																																																																												
5	<p>Click the Save button to finalize. The Attendees field at the bottom of the In-Service page is populated by the selected Caregivers. From this section, one can <i>add, edit, or delete</i> Caregivers from the event.</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p>Discipline: <input type="text" value="HHA"/> Pay Code: <input type="text" value="HHA Hourly"/></p> <p>Discipline 2: <input type="text" value="PCA"/> Pay Code 2: <input type="text" value="PCA Inservice"/></p> <p>Attendees: <input type="button" value="Send Message"/> (18 of 100m.)</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Caregiver Code</th> <th>Alt. Caregiver Code</th> <th>Phone Number</th> <th>Count Towards Compliance</th> <th>No-Show / Unsatisfactory</th> <th>ADD</th> </tr> </thead> <tbody> <tr><td>Amm I Will</td><td>LIS-1333</td><td></td><td>305-555-6666</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Boyd Patti</td><td>LIS-1345</td><td></td><td>305-777-5555</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Chio Teresa</td><td>LIS-1600</td><td></td><td>305-305-3055</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Dunne Michael</td><td>LIS-2287</td><td></td><td></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Karring Imma</td><td>LIS-1356</td><td></td><td></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Kramer Miriam</td><td>LIS-1599</td><td></td><td></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Lafleur Bianca</td><td>LIS-1350</td><td></td><td></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Mark E Mark</td><td>LIS-1349</td><td></td><td>305-232-3232</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Singer D Adele</td><td>LIS-1334</td><td></td><td>305-444-2222</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Vee Veronica</td><td>LIS-1601</td><td></td><td></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr> </tbody> </table> <p style="text-align: center;"><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p style="text-align: center;">Caregivers Scheduled</p> <p><i>Note: This page also serves as an attendee sheet when the event takes place.</i></p>	Name	Caregiver Code	Alt. Caregiver Code	Phone Number	Count Towards Compliance	No-Show / Unsatisfactory	ADD	Amm I Will	LIS-1333		305-555-6666	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Boyd Patti	LIS-1345		305-777-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chio Teresa	LIS-1600		305-305-3055	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dunne Michael	LIS-2287			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Karring Imma	LIS-1356			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Kramer Miriam	LIS-1599			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Lafleur Bianca	LIS-1350			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mark E Mark	LIS-1349		305-232-3232	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Singer D Adele	LIS-1334		305-444-2222	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Vee Veronica	LIS-1601			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																							
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Notify Caregivers

Agencies can send messages to the scheduled Caregivers directly from the **In-Service** page to alert them of the class. Complete the following steps to send a message.

Step	Action
1	<p>On the <i>In Service</i> page in the Attendees section, click the Send Message button as illustrated.</p>  <p style="text-align: center;">Send In-Service Message</p>
2	<p>The <i>Search Caregivers</i> module opens to the <i>Search Caregivers</i> page with the listed Caregivers. Select the Caregivers to send the message to and click on the Bulk Actions button. Select Send Message from the menu.</p>  <p style="text-align: center;">Send Message to Caregivers</p>
3	<p>The <i>Send Message</i> window opens. Complete the required fields (denoted with a red asterisk), such as the Delivery Method (Text, Email, Mobile Messaging, and Mobile and Text) and Message (as seen in the following image). Once complete, click on the Broadcast button to send the message.</p>

Step	Action									
	<div data-bbox="544 304 1149 940" style="border: 1px solid black; padding: 10px;"> <p>Send Message ✕</p> <p><small>All fields marked with an asterisk (*) are required.</small></p> <p>Delivery Method * Delivery Time</p> <p>Text <input checked="" type="radio"/> Now</p> <p style="margin-left: 100px;"><input type="radio"/> Schedule</p> <p>Recipients</p> <p>Amn I Will Singer D Adiele Boyd Patti Mark E Mark Lafleur Bianca Karing Imma Kramer Miriam Chio Teresa Vee Veronica Dunne Michael</p> <p>Subject</p> <p>Annual In-Service Training</p> <p>Script</p> <p>Select Script Options</p> <p>Message *</p> <p>Please ensure to submit your certificate of completion to apply credits to your profile. Thank you.</p> <p>Priority</p> <p><input type="radio"/> High <input type="radio"/> Medium <input checked="" type="radio"/> Low</p> <p style="text-align: center;">Broadcast</p> </div> <p style="text-align: center;">Send Message: Broadcast</p>									
4	<p>The system alerts of a successful broadcast, as well as list of Caregivers for which the message failed to send because of the Caregiver's preferred notification method.</p> <div data-bbox="472 1060 1222 1339" style="border: 1px solid black; padding: 10px;"> <p>Broadcast Message ✕</p> <p><small>Message Sent Successfully. However, the following caregivers did not receive the message due to their notification preferences.</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #2c3e50; color: white;">Caregiver Name</th> <th style="background-color: #2c3e50; color: white;">Caregiver Code</th> <th style="background-color: #2c3e50; color: white;">Notification Preference</th> </tr> </thead> <tbody> <tr> <td>Kramer Miriam</td> <td>LS-1599</td> <td></td> </tr> <tr> <td colspan="3" style="text-align: center;">  </td> </tr> </tbody> </table> <p style="text-align: right;">Close</p> </div> <p style="text-align: center;">Broadcast Message Successful</p>	Caregiver Name	Caregiver Code	Notification Preference	Kramer Miriam	LS-1599				
Caregiver Name	Caregiver Code	Notification Preference								
Kramer Miriam	LS-1599									
										

The Calendar Page

The Caregiver’s Calendar is used to schedule new visits, or review visits that the Caregiver was assigned to from the Patient’s Calendar.

The Caregiver’s Calendar mirrors a Patient’s calendar, with the exception that scheduled visits do not appear in pink or green as Authorizations apply to Patients. For more information regarding scheduling visits and the icons seen on the page, refer to the Patient’s Calendar or the [Scheduling Visits category](#).

Caregiver Info Active																																																									
Name: Amm I Will		Caregiver Code: LIS-1333			Office: Lisset's Office			Caregiver Hours: H: 0 V: 0																																																	
Team:		Vendor: Northeast Homecare Services			Phone: 305-555-6666																																																				
Address: 1234 Brickell Avenue MIAMI, FL, 33132		Languages: English, Spanish			DOB: 06/10/1970																																																				
Calendar																																																									
Month: March		Year: 2018		Send Schedule		Send Patient Info		Caregiver Master Week																																																	
<table border="1"> <thead> <tr> <th>Sunday</th> <th>Monday</th> <th>Tuesday</th> <th>Wednesday</th> <th>Thursday</th> <th>Friday</th> <th>Saturday</th> <th>Hrs.</th> </tr> </thead> <tbody> <tr> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> </tr> <tr> <td></td> <td> 4 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 5 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 6 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 7 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 8 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 9 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td>10</td> </tr> <tr> <td></td> <td> 11 Inservice T:0900 - 1200 </td> <td> 12 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 13 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 14 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 15 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 16 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td>17</td> </tr> <tr> <td></td> <td> 18 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td> 19 S:0800 - 1800 V:- B: N P: N Anderson Adam </td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> </tr> <tr> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> </tr> </tbody> </table>										Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Hrs.	25	26	27	28	29	30	31			4 S:0800 - 1800 V:- B: N P: N Anderson Adam	5 S:0800 - 1800 V:- B: N P: N Anderson Adam	6 S:0800 - 1800 V:- B: N P: N Anderson Adam	7 S:0800 - 1800 V:- B: N P: N Anderson Adam	8 S:0800 - 1800 V:- B: N P: N Anderson Adam	9 S:0800 - 1800 V:- B: N P: N Anderson Adam	10		11 Inservice T:0900 - 1200	12 S:0800 - 1800 V:- B: N P: N Anderson Adam	13 S:0800 - 1800 V:- B: N P: N Anderson Adam	14 S:0800 - 1800 V:- B: N P: N Anderson Adam	15 S:0800 - 1800 V:- B: N P: N Anderson Adam	16 S:0800 - 1800 V:- B: N P: N Anderson Adam	17		18 S:0800 - 1800 V:- B: N P: N Anderson Adam	19 S:0800 - 1800 V:- B: N P: N Anderson Adam	20	21	22	23	24	25	26	27	28	29	30	31	
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The Caregiver’s Calendar

Print Caregiver Calendar Weekly Schedule

A Caregiver’s weekly schedule can be printed directly from the Caregiver’s calendar. When an event is added to the Caregiver Calendar, the Print icon is enabled. Click on the print icon (on the right-most column) as seen on the image below.

To print the entire month, click on the **Print** button on the top-right. The print icon is unavailable for weeks with no visits scheduled.

Caregiver Info Active
 Name: Rose Thomas Caregiver Code: HHA-1973 Office: HHAExchange Office
 Team: Vendor: Excellence Phone: Caregiver Hours: Hrs: 0 V: 0
 Address: 111 Bay 41st St, BROOKLYN, NY, 11214 Languages: DOB: 09/18/1973

Calendar Send Schedule Send Patient Info Caregiver Master Week

Month: April Year: 2018 Search < >

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Hrs. Print
						S:0100 - 0300 V: B: N P: N Sandeep U	1
S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	8
S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	S:0100 - 0300 V: B: N P: N Sandeep U	15
							22
							29
S:0700 - 0800 V: B: N P: N Sandeep U							6

Click to print entire month. Click the icon to print the corresponding week.

Printing a Caregiver's Schedule

The image below illustrates a Caregiver's printed weekly schedule.

HHAexchange **Caregiver Calendar** Report Date: 09/28/2018 11:34 AM

Name: Rose Thomas DOB: 09/18/1973 PRI. Office: HHAExchange Office Team: Location: Branch: Display weeks: 1Week
 Caregiver Code: HHA-1973 Phone: SEC. Office: Address: 111 Bay 41st St, BROOKLYN, NY, 11214 Email: From Date: 04/02/2018

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
S:0100-0300 V: Sandeep U ALBANY, NY	S:0100-0300 V: Sandeep U ALBANY, NY	S:0100-0300 V: Sandeep U ALBANY, NY	S:0100-0300 V: Sandeep U ALBANY, NY	S:0100-0300 V: Sandeep U ALBANY, NY	S:0100-0300 V: Sandeep U ALBANY, NY	S:0100-0300 V: Sandeep U ALBANY, NY
HHA-2.00 hr B:N	HHA-2.00 hr B:N	HHA-2.00 hr B:N	HHA-2.00 hr B:N	HHA-2.00 hr B:N	HHA-2.00 hr B:N	HHA-2.00 hr B:N

Caregiver's Weekly Schedule

The Rates Page

The *Rates* page is used to set specific **Rates** and **Mileage Expenses** for a Caregiver.

Rates

Discipline	Patient Name	Admission ID	Pay Code	From Date	To Date	Hourly	Daily	Visit Status	
HHA			HHA Base	02/01/2016	02/29/2016	10.000000	100.000000	140.000000	Active Edit

Mileage Expense [History](#)

Enable Mileage Expense: ⓘ

Maximum Distance per Trip: (Miles) ⓘ

Maximum Reimbursement per Trip: \$ ⓘ

Starting Location for First Mileage Reimbursement Calculation:

Caregiver Home Address
 Office Address
 Other Address ⓘ

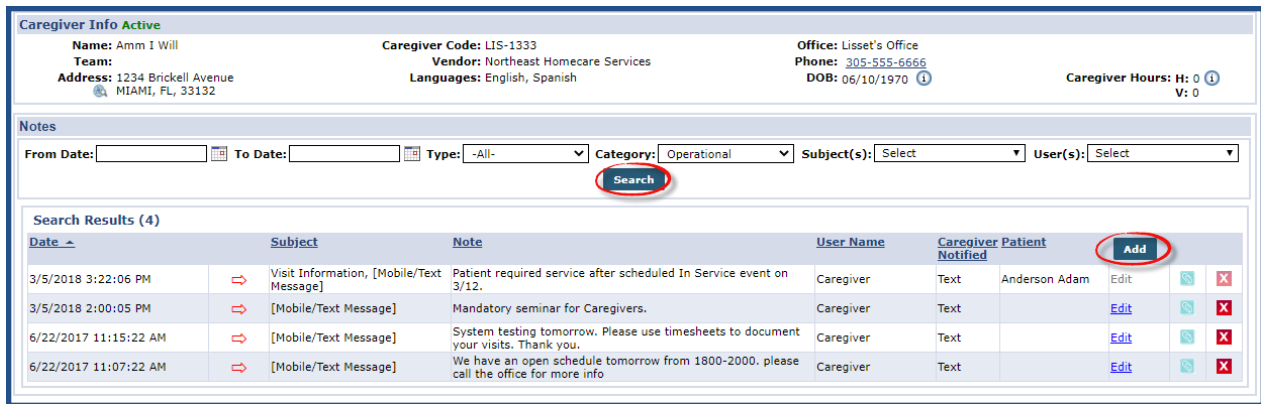
[Save](#)

Rates

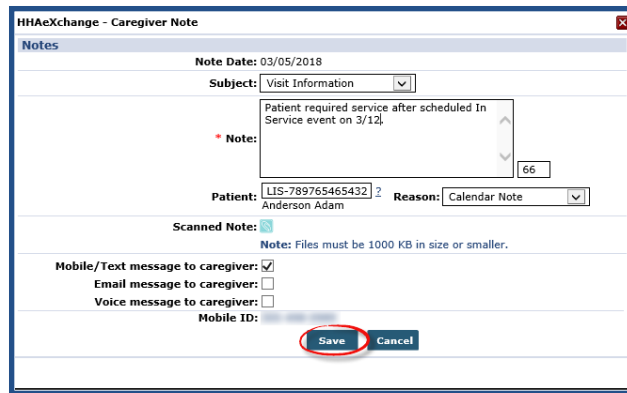
The Notes Page

The **Notes** page is used to capture and archive any Notes specific to the Caregiver such as system issued alerts as well as cross-referenced Patient care notes. Use the search filters (such as **To/From Date**, **Type**, **Category**, **Subject**, and **User**) to locate specific notes and click the **Search** button.

To create a Caregiver Note, click the **Add** button (as illustrated in the image below) and complete the fields as described on the table following the image. Click the **Save** button to finalize.



Caregiver Notes Page



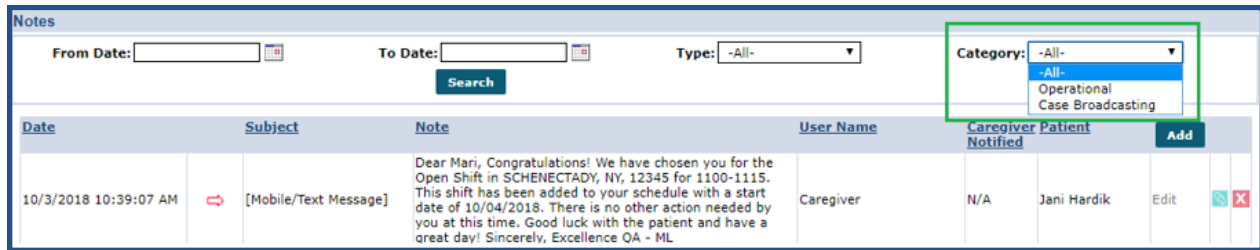
Creating a Caregiver Note

Field	Description
Subject	Select the note subject (created via Reference Table).
Note	Enter a note in the required Note field.
Patient	If the note pertains to a Patient under the Caregiver's care, either enter the Patient name or click the "?" to search for the Patient.
Reason	Select a reason for the note from the dropdown menu.

Field	Description
Scanned Note	Click the icon to upload any supporting documentation.
Message to Caregiver	Based on the Caregiver’s communication preference, or the communication information in the system, a note may be sent to Caregiver’s via Mobile/Text, Email, or Voice Message .

Caregiver Notes Category Filter

On the Caregiver Notes section the Category filter field allows users to select and view Caregiver Notes according to Note type: *All*, *Operational*, and *Case Broadcasting* (as seen in the image below). Use this filter to sort and access the selected Note type without having to go through all Notes.



Caregiver Notes: Category Filter

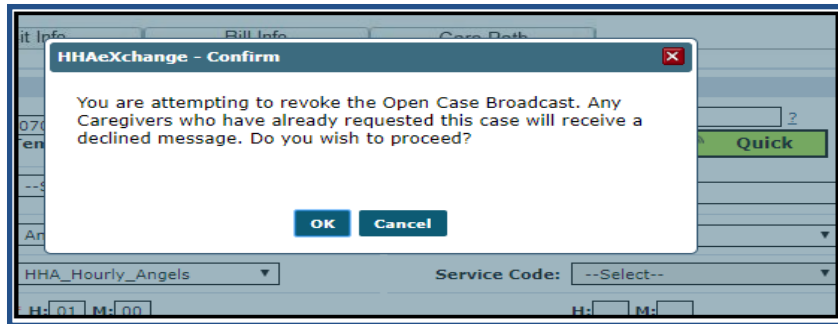
Select...	To View
All	All Caregiver notes
Operational	All Notes, excluding notes related to Case Broadcasting.
Case Broadcasting	Only notes related to Case Broadcasting.

When created, the system auto-categorizes the Notes according to the page or function of origin. For example, if created on the Caregiver General page, the Note is categorized as an *Operational* note (default). Caregiver *Case Broadcasting* Notes are auto-generated (and auto-categorized) in the following cases:

Adding or Editing a Case Broadcast



Revoking a Broadcast



Assigning a Shift to a Caregiver

Office(s):		Excellence QA Team	Coordinator:		All	Contract:		All
Patient Name:		0914 8888888 Referral 1	Team:		All	Location:		All
Visit From:		10/18/2018	Visit To:		10/18/2018	Discipline:		All
Shifts: 1		Total Shift Requests: 1						Page 1 of 1
Coordinator	Visit	Discipline	Contract	Address		Phone	Request	Status
Albert Noble	0200-0800	HHA	Angel's Home	22543646-66666-11111		351-654-5165	Request	Requested
Caregiver	Requested	Employment Type	Hours	Address	Phone	Preferences	Assign	Reject
Scrab, Koushna (EXQ-1535)	10/04/2018 02:34	PCA, HHA	00:00	SCHENECTADY, NY 12345	346-464-4464	Preferences	Assign	Reject

The Payroll Info Page

The Payroll Info page houses a Caregiver’s Payroll information to include basic details, deductions, and tax integration information.

Payroll Info		History
Co Code:	<input type="text" value="LIS123"/>	Pension Profit Sharing: <input type="text" value="No"/>
Rate Type:	<input type="text" value="Hourly"/>	Direct Deposit: <input type="text" value="Yes"/>
Exemption From Overtime:	<input type="text" value="No"/>	1099 Employee: <input type="text" value="No"/>
NYC Resident:	<input type="text" value="No"/>	Medical Deduction Code: <input type="text"/>
Union Reduction:	<input type="text" value="No"/>	City Tax: <input type="text" value="Select"/>
Pay Cycle:	<input type="text" value="Weekly"/>	
Deductions		History
Deduction1:	<input type="text"/>	TDA2: <input type="text"/>
Garnish:	<input type="text"/>	Credit Union: <input type="text"/>
Union Dues:	<input type="text"/>	Tax Deferred: <input type="text"/>
Tax Deferred2:	<input type="text"/>	txtDeduction 8: <input type="text"/>
HRA Specific		History
Payroll Integration		History
Cost Center 1:	<input type="text" value="HHA"/>	Tax Types: <input type="text" value="W2"/>
Cost Center 2:	<input type="text" value="Select"/>	Default Tax Location: <input type="text" value="Select"/>
Cost Center 3:	<input type="text" value="Select"/>	Federal Filing Status: <input type="text" value="Single"/>
Cost Center 4:	<input type="text" value="Select"/>	Federal Exemptions: <input type="text"/>
Cost Center 5:	<input type="text" value="Select"/>	State Filing Status: <input type="text" value="Single"/>
Employee BDB Base Rate:	<input type="text" value="\$"/> ⓘ	State Exemptions: <input type="text"/>
<input type="button" value="Save"/>		

Caregiver Payroll Info Page

The Expenses Page

The *Expenses* page is used to add and track a Caregiver’s expenses when tending to Patients. To add a Caregiver Expense, click the **Add** button and complete the required fields (as described under the image) and click the **Save** button to finalize.

Expenses

From Date: To Date: Expense Type: Billable/Payable:

Batch Number:

Search

Search Results (1) **Add**

Expense Date	Expense Type	Quantity	Billable	Bill Rate	Bill Total	Payable	Pay Rate	Pay Total	Payroll Batch	Entry Date		
02/05/2018	Personal Supplies	1	Yes	\$25.00	\$25.00	Yes	\$25.00	\$25.00		03/05/2018 3:52 PM Vega Lisset (LissetV)	Edit	

Caregiver Expenses

Field	Description
Expense Type	Select the Expense Type (created in Reference Table Management).
Date	The date of the expense.
Quantity	The number of items or amount purchased (expensed).
Billable	<p>Yes or No. Select Yes to bill to a contract and complete the required fields, as follows:</p> <ul style="list-style-type: none"> Patient - Select the applicable Patient who the expenses apply to. Contract - Select the applicable contract. Bill Rate - Indicate the billing rate for the expense Bill Total - The bill total calculated by multiplying the Bill Rate by the specified Quantity. Bill Export Code - Code for the billing expense
Payable	<p>Yes or No. Select Yes for the Agency to reimburse the Caregiver. Create a Payable Expense when prompted by completing the following fields:</p> <ul style="list-style-type: none"> Pay Rate - Select the pay rate for the expense. Pay Total - The total amount paid for the expense; calculated by multiplying the Pay Rate by the specific Quantity. Pay Export Code - Code used for the payroll expense.
Description	Enter a description for the expense.

The Pay Check Page

This page is used to review a Caregiver's paychecks. Choose to view this information using the **Batch View** or **Register View**.

Register View

To search for paychecks using the **Register View**, enter a date range (as required). Enter a Patient Name to review all paychecks associated with that specific Patient. In this view, each individual visit included in the paycheck is listed as a line item (as described in table below the image).



The screenshot shows the 'Pay Check' interface with 'Register View' selected. It includes search fields for 'Visit Date From' (01/01/2011), 'Visit Date To' (01/05/2011), and 'Patient'. Below the search form is a table with the following data:

Visit Date	Scheduled Time	Patient Admission ID	Patient Name	Reg Hrs	Amount	OT Hrs	OT Amount	Hol. Hrs	Hol. Amt	Total		
01/01/2011	0800-2000	900097	Eager Rose	12:00	\$99.00	0		0		\$99.00		
01/01/2011	0800-2000	900097	Eager Rose	12:00	\$99.00	0:00		0:00		99.00	NHCL0026	01/24/2011 01:39
01/02/2011	0800-2000	900097	Eager Rose	12:00	\$99.00	0		0		\$99.00		
01/03/2011	0800-2000	900097	Eager Rose	12:00	\$99.00	0		0		\$99.00		
01/04/2011	0800-2000	900097	Eager Rose	04:00	\$33.00	08:00	\$99.04	0		\$132.04		

Register View

Column	Description
Visit Date	The date of the visit.
Scheduled Time	The time the visit is scheduled for.
Patient Admission ID	Patient's Admission ID number.
Patient Name	The name of the Patient.
Reg Hrs.	The number of hours the Caregiver actually worked.
Amount	The amount paid to the Caregiver for the visit at their regular rate.
OT Hours	The number of overtime ours accrued from the visit.
OT Amount	The amount paid to the Caregiver for the visit at overtime rate.
Hol. Hrs.	The number of holiday hours paid to the Caregiver.
Total	Total amount paid to include regular, overtime, and holiday hours.
Payroll Batch	The payroll batch the visit is included in.
Payroll Batch Date	The date the payroll batch was generated for the visit.

Batch View

To generate a paycheck **Batch View** search, select the Batch Number from the dropdown and enter the required **Week Date** field. In the results, like the **Register View** (discussed in the section above), the **Batch View** displays the same columns with an added **Pay Code** associated with the paycheck. Refer to the section above for field descriptions.

Pay Check

Pay Check View Mode: Batch View Register View

Batch Number : * Week Date:

Current Week (11/23/2013 - 11/29/2013) Created On : [12/05/2013] [12:57:15]

No Data Found

Previous Week (03/09/2013 - 03/15/2013) [No OT]

Visit Date	Visit Time	Patient Number	Patient Name	Reg Hrs	Daily	Pay Code	Pay Rate	Amount	OT Hrs	OT Rate	OT Amount	H Hrs	H Rate	H Amt	Total
03/13/2013	2000-0800	900300	Matthew Jose	12:00		HHA	5.63	\$67.56	0:00			0:00			\$67.56
Week Total:				12:00				\$67.56	00:00		\$0.00	00:00		\$0.00	\$67.56

Previous Week (03/02/2013 - 03/08/2013) [With OT]

Visit Date	Visit Time	Patient Number	Patient Name	Reg Hrs	Daily	Pay Code	Pay Rate	Amount	OT Hrs	OT Rate	OT Amount	H Hrs	H Rate	H Amt	Total
03/08/2013	2000-0800	900300	Matthew Jose	12:00		HHA	5.63	\$67.56	0:00			0:00			\$67.56
Week Total:				12:00				\$67.56	00:00		\$0.00	00:00		\$0.00	\$67.56

Batch View

The Patient Hx Page

The **Patient Hx** page is used to maintain a Caregiver’s visit records; information described in the table below the image.

Patient HX				
Patient Information				
AdmissionID	Patient Name	Total Shifts	Date From	Date To
900002	McBride Harriet	8	12/16/2015	12/31/2015
900003	Silverman Denise	14	01/05/2016	01/18/2016

Patient HX (History)

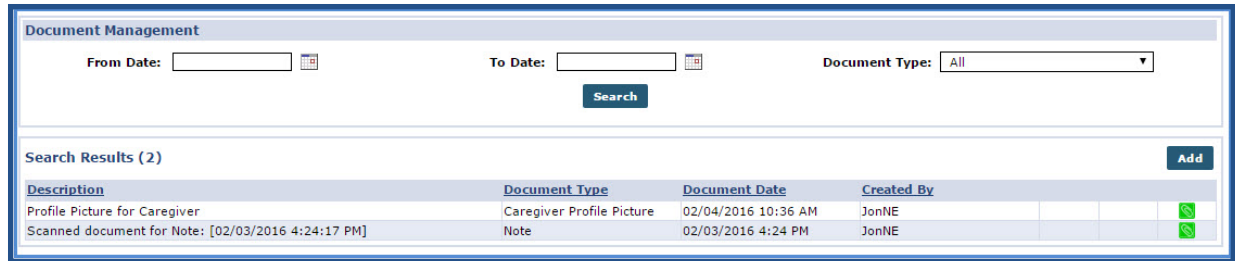
Column	Description
Admission ID	Patient Admission ID
Patient Name	Patient's Name
Total Shifts	The total number of visits that the Caregiver has worked with the Patient.
Date From/To	The date range of when the Caregiver has worked with the Patient - from the first visit to the most recent.

The Others Page

The **Others** page houses any custom fields requested by an Agency. For more information concerning the **Others** page and custom fields, please contact HHAExchange Client Support.

The Caregiver Document Management Page

The (Caregiver) **Document Management** is used to search for uploaded documentation on the **Caregiver Profile**. To perform a search, enter the **From/To Dates** fields and/or select the **Document Type** from the options.



The screenshot shows a 'Document Management' interface with search filters for 'From Date', 'To Date', and 'Document Type'. Below the filters is a 'Search' button. The search results section shows two items:

Description	Document Type	Document Date	Created By
Profile Picture for Caregiver	Caregiver Profile Picture	02/04/2016 10:36 AM	JonNE
Scanned document for Note: [02/03/2016 4:24:17 PM]	Note	02/03/2016 4:24 PM	JonNE

Document Management

The results provide the following set of information:

Field	Description
Description	Details describing when and where the document was uploaded.
Document Type	Type of document loaded into the system.
Document Date	Day and Time the document was uploaded
Created By	System user who created or uploaded the document

Creating a New Caregiver

To create a **New Caregiver**, complete the following steps.

Step	Action
1	Navigate to Caregiver > New Caregiver .
2	<p>From the required Primary Office field, select the Office employing and managing the Caregiver. If the Agency has only one Office, the field is pre-populated (as illustrated). This field must be selected to continue.</p> <div data-bbox="397 640 1282 745" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p style="text-align: center;">New Caregiver</p> <p style="text-align: center;">* Primary Office: Lisset's Office ▼</p> </div> <p style="text-align: center;">Caregiver's Primary Office</p> <p><i>Note: Refer to the Caregiver in Multiple Offices category for complete details on Primary and Secondary Offices.</i></p>
3	<p>Complete all required fields in the Demographics section (denoted with a red asterisk).</p> <div data-bbox="324 934 1360 1197" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Demographics</p> <p>* First Name: Teresa Middle Name: <input type="text"/></p> <p>* Last Name: Chio * Initials: TC</p> <p>* Gender: Female * DOB: 5/28/1980</p> <p>Dependents: <input type="text"/> Alt. Caregiver Code: <input type="text"/></p> <p>* SSN#: 505-05-0505 Ethnicity: Select</p> <p><small>(e.g. xxx-xx-xxxx)</small></p> <p>Caregiver Mobile ID: <input type="text"/> Mobile ID Type: Select</p> <p>Rehire: <input type="checkbox"/> Rehire Date: <input type="text"/> Mobile Device ID: <input type="text"/></p> <p>Marital Status: Select Country of Birth: <input type="text"/></p> </div> <p style="text-align: center;">New Caregiver: Demographics Section</p> <p><i>Note: If a Caregiver was previously employed by the Agency, the original Profile is marked as Terminated. To prevent duplication of the SSN, select the Rehire checkbox and enter the Rehire Date. This allows an Agency to enter multiple records with the same SSN.</i></p>
4	<p>In the Employment Info section, ensure to select the applicable Employment Type as described in the Employment Type section. Select the Application Date. Prior to selecting the Status field, the Type field must be selected.</p>


Step	Action																											
	<div data-bbox="381 331 1302 737" style="border: 1px solid black; padding: 5px;"> <p>Employment Info</p> <p>Referral Source: <input type="text" value="Select"/></p> <p>Referral Person: <input type="text"/></p> <p>Employee ID: <input type="text"/></p> <p>HHA/PCA Registry Number: <input type="text"/></p> <p>NYC Registry References Checked On: <input type="text"/></p> <p>Location: <input type="text" value="Select"/></p> <p>* Employment Type:</p> <table border="0"> <tr> <td><input checked="" type="checkbox"/> PCA</td> <td><input checked="" type="checkbox"/> HHA</td> <td><input type="checkbox"/> RN</td> </tr> <tr> <td><input type="checkbox"/> LPN</td> <td><input type="checkbox"/> PT</td> <td><input type="checkbox"/> OT</td> </tr> <tr> <td><input type="checkbox"/> ST</td> <td><input type="checkbox"/> MSW</td> <td><input checked="" type="checkbox"/> HSK</td> </tr> <tr> <td><input checked="" type="checkbox"/> HMK</td> <td><input type="checkbox"/> NT</td> <td><input type="checkbox"/> RT</td> </tr> <tr> <td><input checked="" type="checkbox"/> PA</td> <td><input type="checkbox"/> HCSS</td> <td><input type="checkbox"/> CNA</td> </tr> <tr> <td><input type="checkbox"/> APC</td> <td><input type="checkbox"/> SCM</td> <td><input type="checkbox"/> SCI</td> </tr> <tr> <td><input type="checkbox"/> ILST</td> <td><input type="checkbox"/> PBIS</td> <td><input type="checkbox"/> RESP</td> </tr> <tr> <td><input type="checkbox"/> ESC</td> <td><input type="checkbox"/> SDP</td> <td><input type="checkbox"/> CBSA</td> </tr> <tr> <td><input type="checkbox"/> Other (Non Skilled)</td> <td colspan="2"><input type="checkbox"/> Other (Skilled)</td> </tr> </table> <p>* Application Date: <input type="text" value="01/15/2018"/></p> <p>* Status: <input type="text" value="Active"/></p> <p>Reason: <input type="text" value="Select"/></p> <p>Notes: <input type="text"/></p> <p>Signed Payroll Agreement: <input checked="" type="checkbox"/> <input type="text" value="01/29/2018"/></p> <p>Added/Checked Registry Date: <input type="text"/></p> <p>Team: <input type="text" value="Select"/></p> <p>Branch: <input type="text" value="Select"/></p> </div> <p style="text-align: center;">New Caregiver: Employment Section</p> <p>Note: Caregivers must be marked as Employee (under Type field) to be assigned to cases. Caregivers marked as Applicant cannot be scheduled.</p>	<input checked="" type="checkbox"/> PCA	<input checked="" type="checkbox"/> HHA	<input type="checkbox"/> RN	<input type="checkbox"/> LPN	<input type="checkbox"/> PT	<input type="checkbox"/> OT	<input type="checkbox"/> ST	<input type="checkbox"/> MSW	<input checked="" type="checkbox"/> HSK	<input checked="" type="checkbox"/> HMK	<input type="checkbox"/> NT	<input type="checkbox"/> RT	<input checked="" type="checkbox"/> PA	<input type="checkbox"/> HCSS	<input type="checkbox"/> CNA	<input type="checkbox"/> APC	<input type="checkbox"/> SCM	<input type="checkbox"/> SCI	<input type="checkbox"/> ILST	<input type="checkbox"/> PBIS	<input type="checkbox"/> RESP	<input type="checkbox"/> ESC	<input type="checkbox"/> SDP	<input type="checkbox"/> CBSA	<input type="checkbox"/> Other (Non Skilled)	<input type="checkbox"/> Other (Skilled)	
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<input type="checkbox"/> Other (Non Skilled)	<input type="checkbox"/> Other (Skilled)																											
5	<p>Complete the remaining sections to include <i>Address, Emergency Contact Information, Caregiver Preferences, and Notification Preferences</i>. Although these sections are not required to create the Profile, HHAX recommends completing as much information as possible which may be needed to schedule and broadcast.</p>																											
6	<p>Click the Save button to complete the Profile.</p> <div data-bbox="358 1115 1328 1377" style="border: 1px solid black; padding: 5px;"> <p>Caregiver Preferences: Used for Scheduling</p> <p><input checked="" type="checkbox"/> Needs Cooking <input type="checkbox"/> Hoyer Lift <input checked="" type="checkbox"/> Cooks</p> <p><input type="checkbox"/> Smoking <input type="checkbox"/> English not primary <input type="checkbox"/> Peanut Allergy</p> <hr/> <p>Notification Preferences</p> <p>Preferred contact Method: <input type="text" value="Mobile/Text Message"/> Email: <input type="text"/></p> <p>Mobile/Text Message: <input type="text" value="786"/> - <input type="text" value="786"/> - <input type="text" value="7866"/> Voice message: <input type="text"/> - <input type="text"/> - <input type="text"/></p> <p style="text-align: center;"><input checked="" type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p style="text-align: center;">Save New Caregiver Profile</p>																											
7	<p>Once complete, the Status is Active (as illustrated in the image below).</p> <div data-bbox="264 1476 1422 1591" style="border: 1px solid black; padding: 5px;"> <p>Caregiver Info Active</p> <p>Name: Chio Teresa Caregiver Code: LIS-1600 Office: Lisset's Office</p> <p>Team: Vendor: Northeast Homecare Services Phone: 305-305-3055</p> <p>Address: 123 Salzedo Drive Languages: English, Spanish, Mandarin DOB: 05/28/1980</p> <p style="text-align: right;">Caregiver Hours: H: 0 V: 0</p> </div> <p style="text-align: center;">Active Caregiver</p>																											

Trainees

Trainees are individuals who are pursuing certification in a Non-Skilled discipline at a school operated by an Agency. Using the **Trainee** functionality, Providers can create a record for a Trainee and track their progress. A Trainee’s record can be converted into a Caregiver Profile once the individual receives a certification.

Creating a Trainee Profile

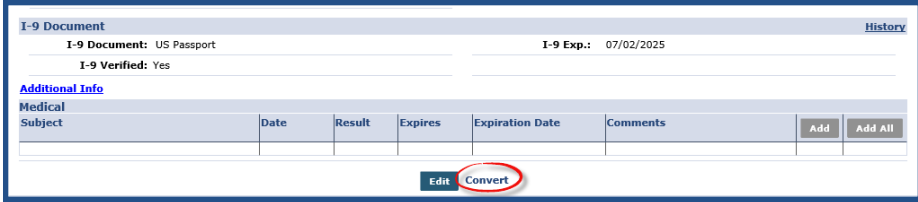

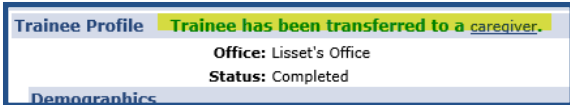
The following table provides instructions when entering a **New Trainee** into the system.

Step	Action
1	Navigate to Caregiver > Trainee > New Trainee .
2	<p>In the top section, select the applicable Office and the Status for the Trainee. The Status field allows an Agency to track the Trainee’s progress from start to finish as well as their success/completion of a certificate program. Select the Date of Enrollment.</p> <div data-bbox="423 926 1271 1014" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>New Trainee</p> <p>Office: <input type="text" value="Lisset's Office"/> <input type="button" value="v"/></p> <p>Status: <input type="text" value="Enrolled"/> <input type="button" value="v"/> Date of Enrollment: <input type="text" value="02/05/2018"/> <input type="button" value="calendar"/></p> </div> <p style="text-align: center;">New Trainee: Top Section</p>
3	<p>In the Demographics section, complete the required fields (denoted with a red asterisk). HHAX recommends that the optional fields also be filled to facilitate the conversion process from Trainee to Caregiver.</p> <div data-bbox="399 1192 1295 1388" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Demographics</p> <p>* First Name: <input type="text" value="Miriam"/> Middle Name: <input type="text"/></p> <p>* Last Name: <input type="text" value="Kramer"/> * Initials: <input type="text" value="MK"/></p> <p>* Gender: <input type="text" value="Female"/> <input type="button" value="v"/> * DOB: <input type="text" value="8/22/1968"/> <input type="button" value="calendar"/></p> <p>* SSN#: <input type="text" value="583-98-7411"/> (e.g. xxx-xx-xxxx) Country of Birth: <input type="text" value="United States"/></p> <p>Marital Status: <input type="text" value="Married"/> <input type="button" value="v"/> Picture: </p> <p>Ethnicity: <input type="text" value="Select"/> <input type="button" value="v"/> Referral Source: <input type="text" value="Select"/> <input type="button" value="v"/></p> <p>Language 1: <input type="text" value="English"/> <input type="button" value="v"/> Language 2: <input type="text" value="German"/> <input type="button" value="v"/></p> </div> <p style="text-align: center;">Trainee Demographics Section</p>
4	Complete the next three sections to include Employment Info , Address , and Emergency Contact (s) . These sections are optional; no fields required to save the Profile.
5	In the Enrollment Information section, complete the various fields showing if the trainee is enrolled in a training program. Record any other certifications and credentials provided.

Step	Action
	<div data-bbox="363 302 1333 590"> </div> <p data-bbox="651 611 1049 632" style="text-align: center;">Trainee Enrollment Information Section</p> <p data-bbox="272 657 1365 684">The Training School field populates values based on the Office’s assigned Compliance Setup.</p> <p data-bbox="272 726 1401 789">Note: Many fields and values within the Enrollment Information section are customizable. Please consult the HHAX Trainer for details.</p>
6	<p data-bbox="272 804 1393 867">The last section is where the I-9 documentation is noted. Select the identification presented as well as expiration date and if it was verified.</p> <div data-bbox="370 890 1325 1073"> </div> <p data-bbox="699 1094 997 1115" style="text-align: center;">Trainee I-9 Document Section</p>
7	<p data-bbox="272 1129 753 1157">Click the Save button to save the profile.</p>
8	<p data-bbox="272 1171 1409 1234">To add or edit information to a Trainee Profile navigate to Caregiver > Trainee > Search Trainee and select the desired record.</p> <p data-bbox="272 1276 1089 1304">For example, updating a Trainee’s Status (as illustrated in the image).</p> <div data-bbox="509 1327 1187 1509"> </div> <p data-bbox="711 1524 987 1545" style="text-align: center;">Updating a Trainee’s Status</p>

Converting a Trainee

A Trainee can be converted to a Caregiver once he/she has received a certification and their record status is updated to *Completed*. Follow the steps outlined below to convert a Trainee to a Caregiver in the system.

Step	Action
1	Navigate to Caregiver > Trainee > Search Trainee .
2	<p>Scroll to the bottom of the Trainee Profile. Click the Convert link (next to the Edit button).</p>  <p style="text-align: center;">Convert Link (Trainee Profile)</p> <p>Note: Although the Convert link is visible regardless of the Trainee Status, a Trainee's Status must be updated to Completed before converting to a Caregiver.</p>
3	<p>The Trainee's Profile becomes that of Active Caregiver (as shown in the following image).</p>  <p style="text-align: center;">New Active Caregiver</p> <p>Note: HHAX keeps the Trainee record for reference purposes. To view the record, search for the Trainee (Caregiver > Trainee > Search Trainee). Records for Trainees who have been converted to Caregivers indicate that the "Trainee has been transferred to a Caregiver" (as shown in the image).</p> 

Searching for a Caregiver

To access the Caregiver Profile, complete the following:

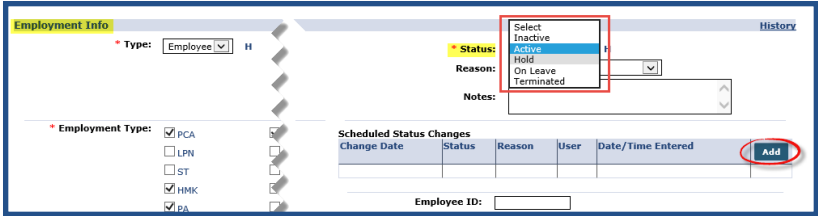
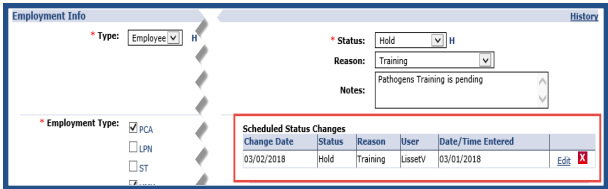
Step	Action																																																																																																			
1	Navigate to Caregiver > Caregiver Search .																																																																																																			
2	<p>Use the filter fields to refine the search results and click the Search button.</p> <div data-bbox="289 562 1404 924" style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Caregiver Search</p> <p>Last Name: <input type="text"/> First Name: <input type="text"/> Office(s): <input type="text" value="HHAExchange Office"/> Type: <input type="text" value="Employee"/></p> <p>Caregiver Code: <input type="text"/> Alt. Caregiver Code: <input type="text"/> SSN: <input type="text"/> Status: <input type="text" value="Active"/></p> <p>Discipline: <input type="text" value="All"/> Team: <input type="text" value="All"/> Location: <input type="text" value="All"/> Branch: <input type="text" value="All"/></p> <p>Phone Number: <input type="text"/> DOB: <input type="text"/></p> <p style="text-align: center;"><input type="button" value="Search"/></p> </div> <p>Search Results (237) Page 1 of 5 Next Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Code</th> <th>Office(s)</th> <th>Alt. Caregiver Code</th> <th>SSN</th> <th>Date of Birth</th> <th>Phone</th> <th>Type</th> <th>Team</th> <th>Status</th> <th>Discipline</th> </tr> </thead> <tbody> <tr> <td>[Name]</td> <td>HHA-3313</td> <td>HHAExchange Office</td> <td>22222</td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td>213-357-6576,687-654-6546,697-654-6546</td> <td>Employee</td> <td>A Team - updated</td> <td>Active</td> <td>PCA, HHA, Other (Non Skilled)</td> </tr> <tr> <td>[Name]</td> <td>HHA-20474</td> <td>HHAExchange Office</td> <td></td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td></td> <td>Employee</td> <td>A Team - updated</td> <td>Active</td> <td>PCA, HHA</td> </tr> <tr> <td>[Name]</td> <td>EXQ-3755</td> <td>Excellence QA Team, HHAExchange Office</td> <td>6546876</td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td>346-764-6546,987-651-6354,987-965-1321</td> <td>Employee</td> <td>A C T</td> <td>Active</td> <td>PCA, HHA, CNA, HMK, RESP</td> </tr> <tr> <td>[Name]</td> <td>HHA-31561</td> <td>HHAExchange Office</td> <td></td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td></td> <td>Employee</td> <td></td> <td>Active</td> <td>PCA, HHA X</td> </tr> <tr> <td>[Name]</td> <td>HHA-22195</td> <td>HHAExchange Office</td> <td></td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td></td> <td>Employee</td> <td>QATEAM</td> <td>Active</td> <td>HHA</td> </tr> <tr> <td>[Name]</td> <td>HHA-20590</td> <td>HHAExchange Office</td> <td></td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td></td> <td>Employee</td> <td></td> <td>Active</td> <td>PCA, HHA</td> </tr> <tr> <td>[Name]</td> <td>HHA-31017</td> <td>HHAExchange Office</td> <td></td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td></td> <td>Employee</td> <td></td> <td>Active</td> <td>PCA, HHA</td> </tr> <tr> <td>[Name]</td> <td>HHA-22188</td> <td>HHAExchange Office</td> <td></td> <td>XXX-XX-XXXX</td> <td>XX/XX/XXXX</td> <td></td> <td>Employee</td> <td></td> <td>Active</td> <td>PCA, HHA, RN X</td> </tr> </tbody> </table> <p style="text-align: center;">Caregiver Search Filters</p> </div>	Name	Code	Office(s)	Alt. Caregiver Code	SSN	Date of Birth	Phone	Type	Team	Status	Discipline	[Name]	HHA-3313	HHAExchange Office	22222	XXX-XX-XXXX	XX/XX/XXXX	213-357-6576,687-654-6546,697-654-6546	Employee	A Team - updated	Active	PCA, HHA, Other (Non Skilled)	[Name]	HHA-20474	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee	A Team - updated	Active	PCA, HHA	[Name]	EXQ-3755	Excellence QA Team, HHAExchange Office	6546876	XXX-XX-XXXX	XX/XX/XXXX	346-764-6546,987-651-6354,987-965-1321	Employee	A C T	Active	PCA, HHA, CNA, HMK, RESP	[Name]	HHA-31561	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA X	[Name]	HHA-22195	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee	QATEAM	Active	HHA	[Name]	HHA-20590	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA	[Name]	HHA-31017	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA	[Name]	HHA-22188	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA, RN X
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[Name]	EXQ-3755	Excellence QA Team, HHAExchange Office	6546876	XXX-XX-XXXX	XX/XX/XXXX	346-764-6546,987-651-6354,987-965-1321	Employee	A C T	Active	PCA, HHA, CNA, HMK, RESP																																																																																										
[Name]	HHA-31561	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA X																																																																																										
[Name]	HHA-22195	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee	QATEAM	Active	HHA																																																																																										
[Name]	HHA-20590	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA																																																																																										
[Name]	HHA-31017	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA																																																																																										
[Name]	HHA-22188	HHAExchange Office		XXX-XX-XXXX	XX/XX/XXXX		Employee		Active	PCA, HHA, RN X																																																																																										
3	In the results, click on the Caregiver's Name to access their Profile.																																																																																																			

Caregiver Status

The **Caregiver Status** function allows Agencies to track employment status in the system to ensure that only authorized, available Caregivers may be scheduled. The Caregiver Status is the determining factor when scheduling a Caregiver to provide service.

Status	Description
Active	Caregiver is authorized and available to provide service. Caregivers listed as <i>Active</i> may be scheduled for visits.
Inactive	Status categories include Inactive , Hold , On Leave , and Terminated . These status categories are assigned as applicable and at the Agency’s discretion. A Caregiver with any of these statuses <u>cannot be scheduled for visits</u> .

Follow the steps outlined below to change a Caregiver Status in the system.

Step	Action
1	Navigate to Caregiver > Caregiver Search .
2	Select the <u>Profile</u> link from the Index. On the Profile page, click the <u>Edit</u> button at the bottom of the page.
3	<p>Scroll to the <i>Employment Info</i> section. Select the applicable status from the Status field (as illustrated in the image).</p>  <p style="text-align: center;">Changing Caregiver Status</p>
4	<p>(Optional) Enter a Reason (setup using the <i>Caregiver Status Reason</i> Reference Table) and Note when changing a Caregiver’s Status, providing a more complete record for the employment status change.</p> 
5	(Optional) In the <i>Scheduled Status Changes</i> grid, click the Add button to schedule the Status change and complete the required fields.

Step	Action
	<p style="text-align: center;">Schedule Status Change</p>
6	Click the Save button to finalize.

Caregiver Terminated Status


When a **Caregiver Status** is changed to *Terminated* in the Caregiver Profile page, a **105 Sent** checkbox becomes available. To the right of the **105 Sent** checkbox, a green paperclip icon (attachment) is used to upload any supporting documentation (as seen in the following image).

Caregiver Profile: Terminated Status (105 Sent Attachment)

Note: The attachment icon is also included in the Caregiver Status window (Scheduled Status Changes section) as well as in the Caregiver Document Management page.

Save Caregiver with Skilled and Non-Skilled Disciplines

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



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

Service-specific *Disciplines* apply throughout the Enterprise application, split in two categories: *Skilled* (such as RN, LPN, MSW) and *Non-Skilled* (such as HHA, HSK, PCA). These Disciplines are associated to Caregivers, Patients, Billing Service Codes, Payroll Codes, and several other system attributes.

When applied to a Caregiver, Disciplines are labeled **Employment Type**. Although Caregivers can be assigned multiple Employment Types, the system does not allow cross-discipline assignment (i.e., Skilled with Non-Skilled). Selected *Employment Types* (Disciplines) activate system validations which prevent the Caregiver from being properly scheduled and paid, as well as the visit correctly billed.

This validation can be lifted allowing both *Skilled* and *Non-Skilled Disciplines* (**Employment Types**) to be assigned to a Caregiver. This allows Providers to schedule and bill when tasks cross between the two categories; for example, a Registered Nurse covering a Home Health Aide (HHA) shift.

Removing the Caregiver Discipline Validation

Once the **Remove Caregiver Employment Type Restriction** is enabled, then the Caregiver can be assigned both *Skilled* and *Non-Skilled Employment Types*, as illustrated in the following image.

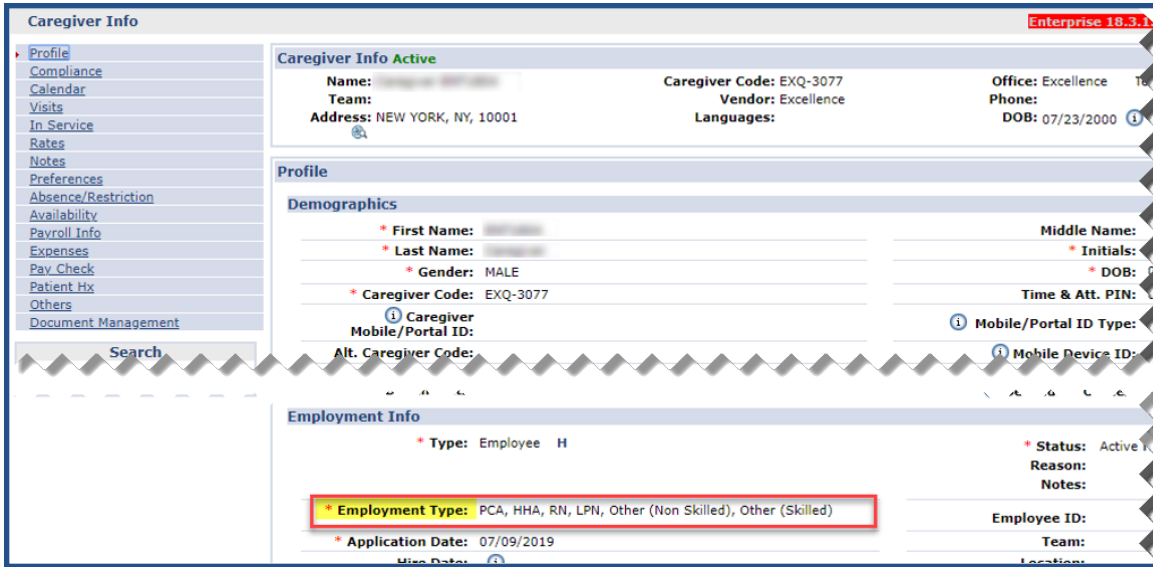
The screenshot shows the 'New Caregiver' form with the following fields and selections:

- Primary Office:** Excellence
- Demographics:**
 - First Name:** ENT1804
 - Middle Name:** (empty)
 - Marital Status:** Select
 - Country of Birth:** (empty)
- Employment Info:**
 - Referral Source:** Select
 - Employment Type:**

<input checked="" type="checkbox"/> PCA	<input checked="" type="checkbox"/> HHA	<input checked="" type="checkbox"/> RN
<input checked="" type="checkbox"/> LPN	<input type="checkbox"/> PT	<input type="checkbox"/> OT
<input type="checkbox"/> ST	<input type="checkbox"/> MSW	<input type="checkbox"/> HSK
<input type="checkbox"/> HMK	<input type="checkbox"/> NT	<input type="checkbox"/> RT
<input type="checkbox"/> PA	<input type="checkbox"/> HCSS	<input type="checkbox"/> CNA
<input type="checkbox"/> APC	<input type="checkbox"/> SCM	<input type="checkbox"/> SCI
<input type="checkbox"/> ILST	<input type="checkbox"/> PBIS	<input type="checkbox"/> RESP
<input type="checkbox"/> ESC		
<input checked="" type="checkbox"/> Other (Non Skilled)		

Creating a New Caregiver: Selecting Skilled and Non-Skilled Employment Types

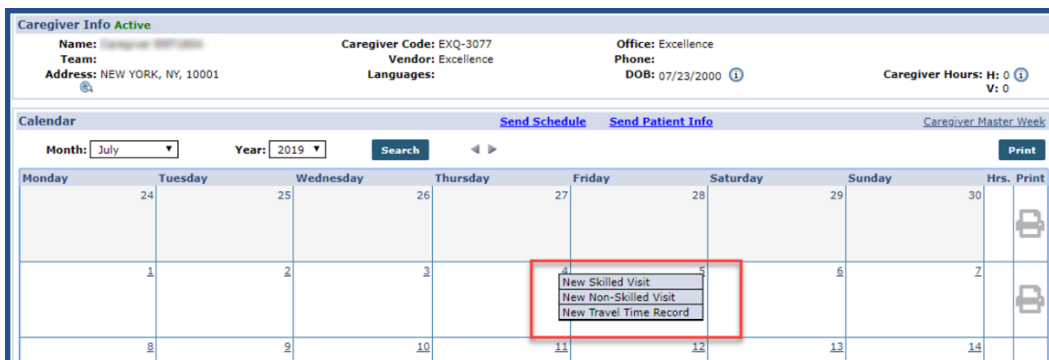
Once saved, the selected **Employment Types** are indicated in the *Caregiver Info* page (*Caregiver > Profile*), as seen in the image below.



Caregiver Info Page: Employment Types

Scheduling Skilled and Non-Skilled Visits on the Caregiver Calendar

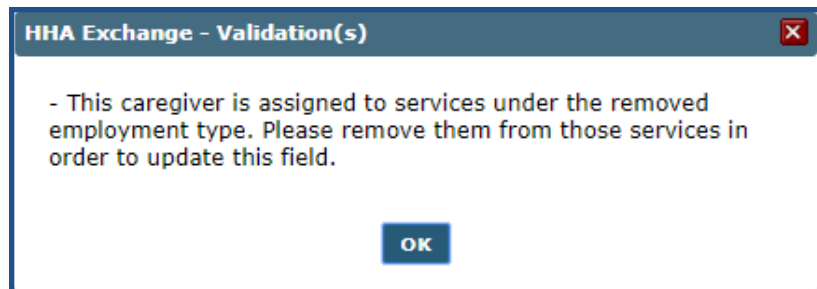
If a Caregiver is assigned both Skilled and Non-Skilled disciplines, then both types of visits can be scheduled. Navigate to the Caregiver’s Calendar page (*Caregiver > Calendar*) and select the desired date (number link). The menu options indicate which type of visit to schedule: *New Skilled Visit* and/or *New Non-Skilled Visit*, as seen in the following image.



Caregiver Calendar

Validate Schedule when Removing Skilled/Non-Skilled Discipline Type

Disciplines/Employment Types can be removed from the Caregiver's Profile (*Caregiver > Profile*) page as long as no visits have been scheduled under the Discipline.

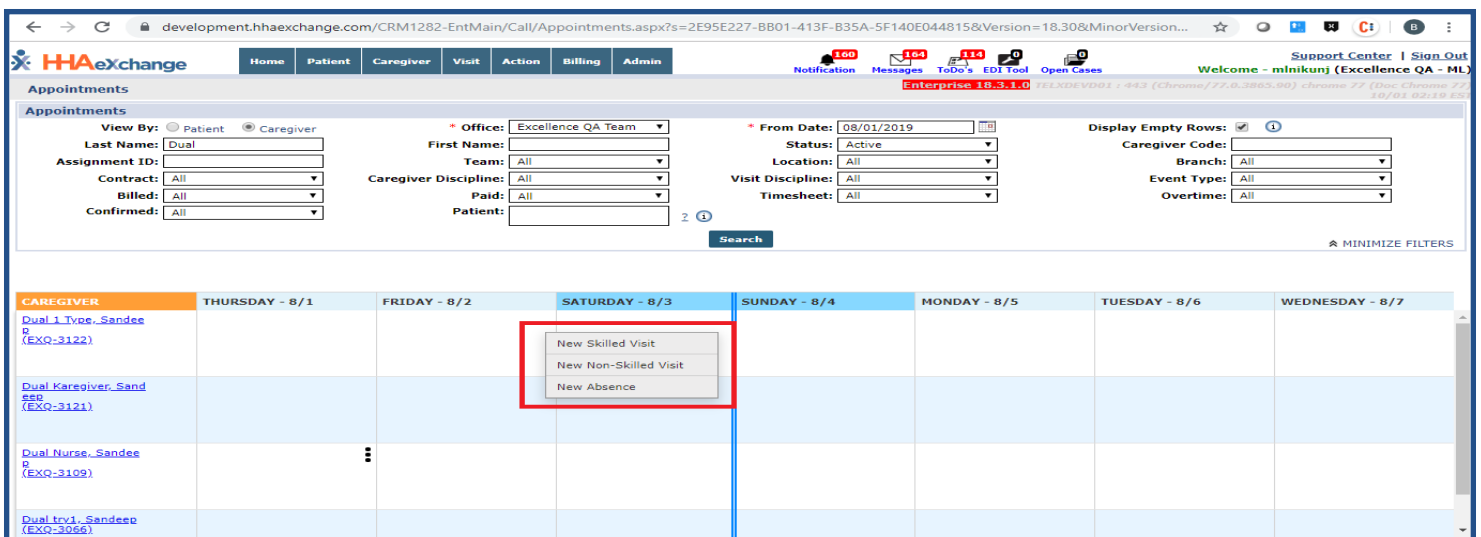


Validation: Removing Employment Type

When attempting to remove a Discipline which is associated with a scheduled visit, the system issues a validation error (as seen in the image above) indicating that the Employment Type can only be removed when the visit (services) has been updated.

Page Updates Appointments Page

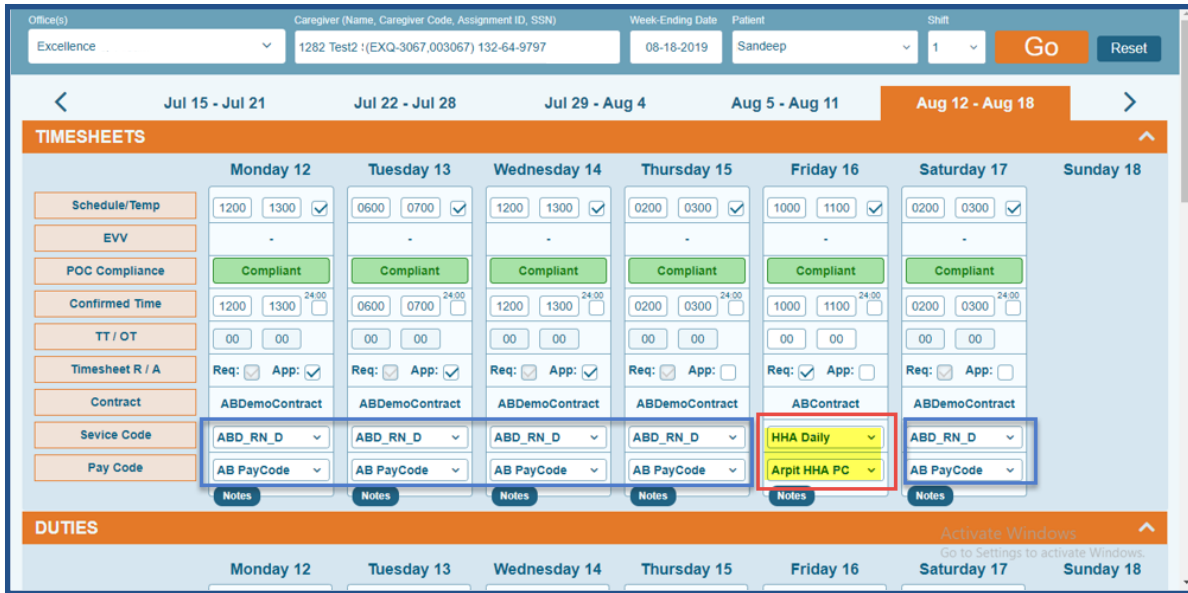
The *Appointments* page (*Visit > Appointment > Caregiver*) reflects a Caregiver's Skilled and Non-Skilled visits. When using the Appointments page to schedule visits, the options for *New Skilled visit* and *New Non-Skilled visit* are available (as seen in the image below).



Appointments Page: Caregiver Skilled & Non-Skilled Visits

Confirm Timesheet Page

The *Confirm Timesheet* page (**Action > Confirm Timesheets**) has been updated to reflect a Caregiver’s Skilled and Non-Skilled visits. Timesheets can be confirmed and saved for both Employment Type categories. Both *Skilled* and *Non-Skilled* visit-related primary **Service Codes** and **Pay Codes** are loaded respectively.



	Monday 12	Tuesday 13	Wednesday 14	Thursday 15	Friday 16	Saturday 17	Sunday 18
Schedule/Temp	1200 1300 ✓	0600 0700 ✓	1200 1300 ✓	0200 0300 ✓	1000 1100 ✓	0200 0300 ✓	
EVV	-	-	-	-	-	-	-
POC Compliance	Compliant	Compliant	Compliant	Compliant	Compliant	Compliant	
Confirmed Time	1200 1300 24.00	0600 0700 24.00	1200 1300 24.00	0200 0300 24.00	1000 1100 24.00	0200 0300 24.00	
TT / OT	00 00	00 00	00 00	00 00	00 00	00 00	
Timesheet R / A	Req: <input checked="" type="checkbox"/> App: <input checked="" type="checkbox"/>	Req: <input checked="" type="checkbox"/> App: <input checked="" type="checkbox"/>	Req: <input checked="" type="checkbox"/> App: <input checked="" type="checkbox"/>	Req: <input checked="" type="checkbox"/> App: <input type="checkbox"/>	Req: <input checked="" type="checkbox"/> App: <input type="checkbox"/>	Req: <input checked="" type="checkbox"/> App: <input type="checkbox"/>	
Contract	ABDemoContract	ABDemoContract	ABDemoContract	ABDemoContract	ABContract	ABDemoContract	
Service Code	ABD_RN_D	ABD_RN_D	ABD_RN_D	ABD_RN_D	HHA Daily	ABD_RN_D	
Pay Code	AB PayCode	AB PayCode	AB PayCode	AB PayCode	Arpit HHA PC	AB PayCode	

Confirm Timesheet (Beta) Page: Skilled and Non-Skilled Disciplines

Updates to the Mobile App

Once the feature is enabled at the Agency Level, updates are also reflected on the Mobile App thereby removing the validation allowing for a Skilled Caregiver to record a Non-Skilled visit.

Bulk Pay Rate Adjust Page Enhancements

The *Bulk Pay Rate Adjust* page (*Caregiver > Bulk Pay Rate*) has been enhanced by the addition of the **Schedule Start Time** and **Schedule End Time** search filters facilitating the search for visits scheduled in specific hours of the day. Additionally, the **Caregiver Code** column has been added to indicate and verify the Caregiver's Primary Office for each visit.

The following image illustrates the added search fields. The accepted values for these fields are numerical values, using the 24-hour format (0000-2359). If either a **Schedule Start Time** or **Schedule End Time** is entered, then both fields are required; otherwise, the system issues a validation error.

Schedule Start/End Times entered must be sequential (i.e., the **Schedule End Time** must be greater than the **Schedule Start Time**).

Bulk Pay Rate Adjust Page: Schedule Start/End Time Search Fields

In the Search Results, a **Caregiver Code** column has been added to identify the Caregiver's Primary Office.

Visit Date	Schedule Start	Schedule End	Admission ID	Patient Name	Contract	Service Code	Caregiver Name	Caregiver Code	Pay Code	Pay Rate	Paid	Override Pay Rate
09/06/2019	01:00	02:00	EXQ-90002059 8536476	Sandeep E-billing Test	CRH1284	PCA Hourly	Canarys CRM-1282-CG001	EXQ-3061	PCA Defeult	\$0.00	N	
09/05/2019	01:00	02:00	EXQ-90002059 8535399	09052016 Patient	ABDemoContr e/it	ABD_PCA_D	Canarys CRM-1282-CG001	EXQ-3061	PCA Defeult	\$0.00	N	
09/05/2019	19:00	20:00	EXQ-90002059 8536476	Sandeep E-billing Test	ABContract	HHA Hourly	Caregiver CRM1283	EXQ-3064	HHA Hourly	\$15.00	N	

Caregiver Code Column in Bulk Pay Rate Adjustment Page

Caregiver Gender Options

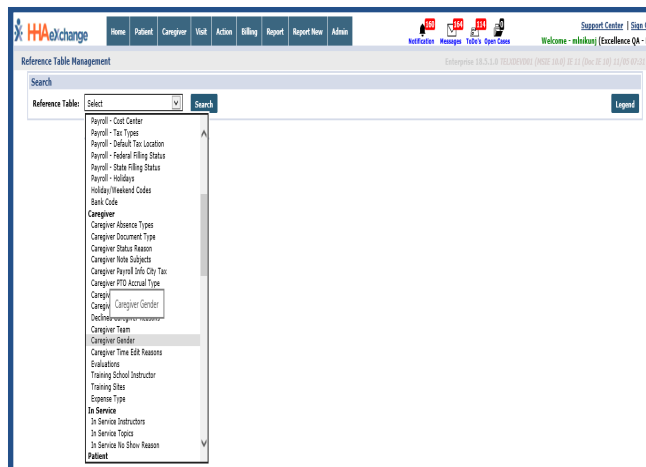
Tip: You can press **Ctrl-F** on your keyboard to search this topic.

In addition to the default values of *Male* and *Female* for **Gender**, Providers can create additional Caregiver Gender options via the Reference Table Management function. Once created in the Reference Table, the gender can be assigned to applicable Caregiver pages respectively. This applies to any function or page applicable to the Caregiver Gender field to include Patient Preferences, Availability, and Matching Caregivers for Broadcasting.

Note: Does not apply to the Mobile App.

Reference Table Management Caregiver Gender

To create a Caregiver Gender option, navigate to **Admin > Reference Table Management**. From the **Reference Table** field, select *Caregiver Gender* (under the *Caregiver* category) and click **Search** to access the Caregiver Gender table.



Caregiver Gender Reference Table

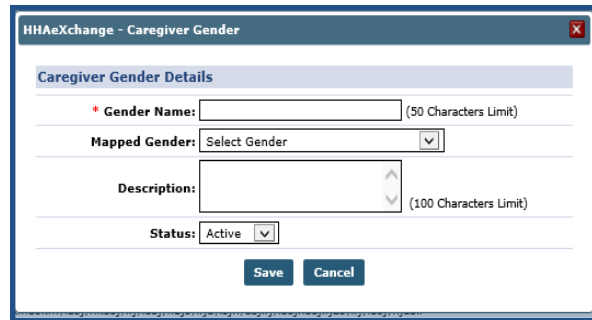
The *Male* and *Female* default options are standard on the Caregiver Gender Reference Table. To add a Gender option, click on the **Add** button.

Search Results			
Caregiver Gender ID	Caregiver Gender	Description	Status
1	Male	Male	Active
2	Female	Female	Active

Add a Caregiver Gender Option

The *Caregiver Gender* window opens. Complete the fields presented. The **Gender Name** field is required as denoted by the red asterisk. In the (optional) **Mapped Gender** field, select where to map the gender to facilitate searches throughout the system. Click **Save** to add.

To update an existing Caregiver Gender option, click on the applicable Gender (link) and update the desired field.

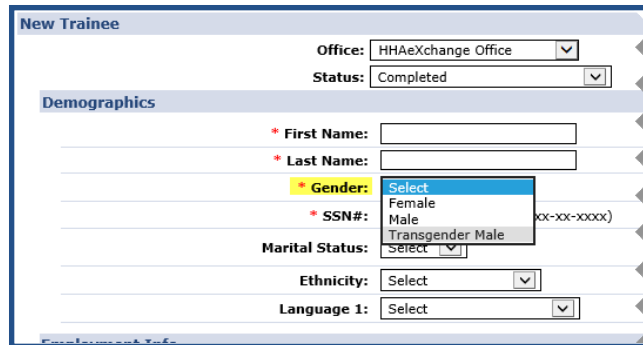


Caregiver Gender Window

Note: Caregiver Gender options are unique once created and the system does not allow duplication.

Trainee Page

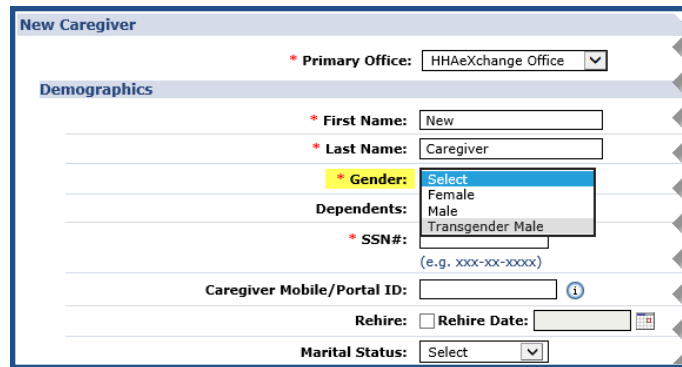
When adding a *New Trainee*, the **Gender** field is populated with Active Gender options created in the Caregiver Gender table in Reference Table Management. To edit a Trainee’s Gender option once the profile is created, click on the **Edit** button and select the applicable Gender option. Click **Save**.



New Trainee: Gender Field

New Caregiver Profile Gender

When creating a New Caregiver, the **Gender** field is populated with the created Gender options via the Reference Table Management functionality.

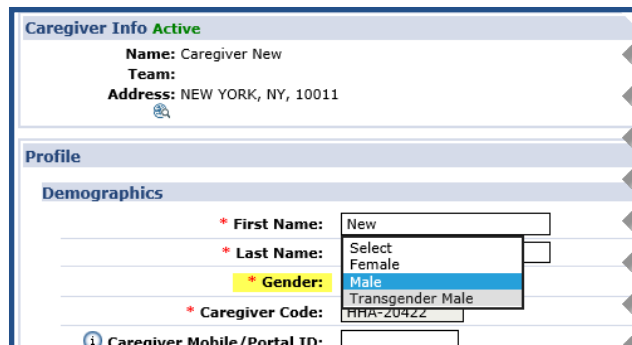


The screenshot shows the 'New Caregiver' form. At the top, there is a 'Primary Office' dropdown menu set to 'HHAeXchange Office'. Below this is the 'Demographics' section. It includes fields for 'First Name' (New), 'Last Name' (Caregiver), and 'Gender'. The 'Gender' dropdown menu is open, showing options: 'Select', 'Female', 'Male', and 'Transgender Male'. Other fields include 'Dependents', 'SSN#' (with a format example '(e.g. xxx-xx-xxxx)'), 'Caregiver Mobile/Portal ID', 'Rehire' checkbox and 'Rehire Date', and 'Marital Status' dropdown.

New Caregiver: Gender Field

Edit Caregiver Gender

To update an existing Caregiver’s gender, navigate to **Caregiver > Profile** and click on the **Edit** button to make fields available. From the **Gender** field, select the applicable gender option (as created in the Caregiver Gender Reference Table).



The screenshot shows the 'Caregiver Info Active' profile page. It displays 'Name: Caregiver New', 'Team:', and 'Address: NEW YORK, NY, 10011'. Below is the 'Profile' section with 'Demographics' fields. 'First Name' is 'New', 'Last Name' is 'Caregiver', and 'Gender' is 'Male'. The 'Gender' dropdown menu is open, showing options: 'Select', 'Female', 'Male', and 'Transgender Male'. Other fields include 'Caregiver Code' (THRZ04ZZ) and 'Caregiver Mobile/Portal ID'.

Edit Caregiver Gender

Caregiver Gender Option Updates – Other Pages

The **Caregiver Gender** option updates are reflected in applicable pages throughout the system to include: *Patient Special Request*, *Caregiver Availability*, *Broadcasting a Visit*, *Smart Map*, and *Conexus* (as described in the following subsections and images).

Patient Special Request

The **Preferred Gender** field has been updated in the *Patient Special Request* page (**Patient > Special Request**) under the *Patient Preferences: Used for Scheduling* section (as seen in the image below). The value selected here also reflects when searching for Caregivers to schedule a visit or when scheduling multiple visits via the Master Week functionality.

Patient Special Request

General

Patient Info - Active

Name: [Redacted] Admiss
 DOB: [Redacted] Primary Alt. Pa

Coordinators: [Redacted]

Special Requests

Patient Preferences: Used for Scheduling

Careg / Ref Demo

Primary Language: Select

Preferred Gender: Select
 Female
 Male
 Transgender Male

Other:

Patient Special Requests: Preferred Gender

Caregiver Availability

This value is also reflected when conducting a *Caregiver Availability* search to schedule a visit. The screen below is accessed via the *Schedule* tab when clicking on the “?” icon to the right of the **Caregiver Code** field.

Search Type

Fill a Specific Shift Search Caregiver Availability

* Office: [Dropdown]

Enter Caregiver Criteria

Available to work: Thursday [] - [] Live-In Friday [] - [] Live-In Saturday [] - [] Live-In Sunday [] - [] Live-In

Search by Caregiver: Preferred [Dropdown] Availability

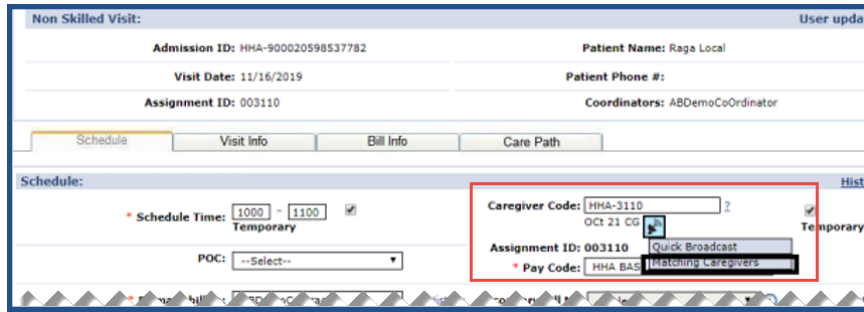
Language: All [Dropdown] Gender: All [Dropdown] Discipline: [Dropdown]
 Team: All [Dropdown] Location: Female [Dropdown] Branch: [Dropdown]
 County / Borough: All [Dropdown] Miles: Male [Dropdown] From: Zip Code: [Dropdown]
 Status: [Dropdown]

Search View Report

Caregiver Availability

Broadcasting a Visit

The *Caregiver Gender* update is also applicable to the **Broadcast** function when conducting a search for a Matching Caregiver.



Non Skilled Visit: User update

Admission ID: HHA-900020598537782 Patient Name: Raga Local

Visit Date: 11/16/2019 Patient Phone #:

Assignment ID: 003110 Coordinators: ABDemoCoOrdinator

Schedule Visit Info Bill Info Care Path

Schedule: Hist

* Schedule Time: 1000 - 1100
Temporary

POC: --Select--

Caregiver Code: HHA-3110 2
OCT 21 CG

Assignment ID: 003110 Quick Broadcast Temporary

* Pay Code: HHA BAS Matching Caregivers

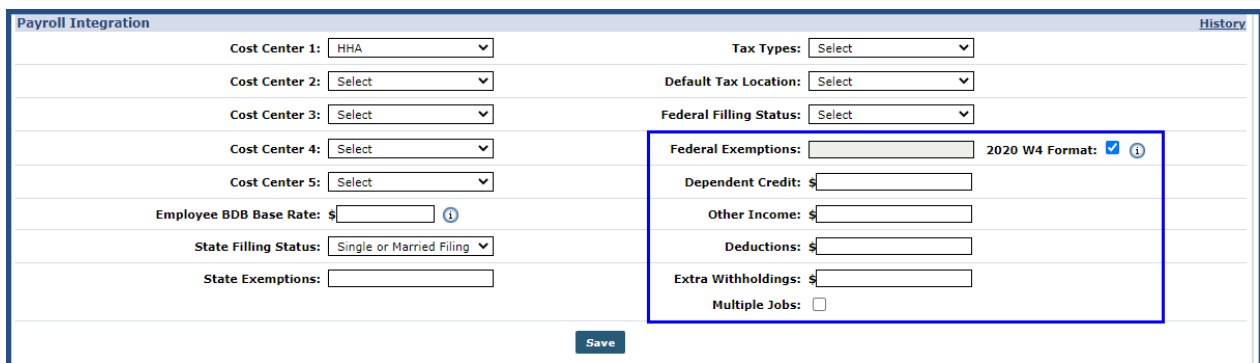
Visit Broadcast: Matching Caregivers Option

Added Fields to Accommodate 2020 W4 Form Changes

As of January 1, 2020, the Federal government applied updates for employers to capture exemption and deduction information for new employees. This update impacts how payroll Providers calculate and deduct tax amounts when processing employee paychecks.

Many Providers enter this exemption/deduction information in the Caregiver Profile when onboarding new Caregivers. Along with other Caregiver demographic information, these values are passed to Payroll Providers via an export file. On the *Caregiver Payroll Info* page (**Caregiver > Payroll Info**), under the Payroll Integration section, select the **2020 W4 Format** checkbox to open added fields to account for the 2020 W4 format.

If an employee is hired **after** January 1, 2020 (or made changes to their W4 filing status after this date), then select the **2020 W4 Format** checkbox to open the added fields as seen in the following image.



Payroll Integration Section

The **Federal Exemptions** field becomes unavailable and is replaced by the following fields: **Dependent Credit**, **Other Income**, **Deductions**, **Extra Withholdings**, and **Multiple Jobs** checkboxes. Complete the fields with respective amounts (only numerical values and decimal allowed) and select the **Multiple Jobs** checkbox (if applicable). Click **Save** to finalize.

Once saved, the relevant information populated in the W4 fields becomes available for inclusion in the Provider Payroll Export files which are exported to 3rd-party payroll systems.

If an employee was hired before January 1, 2020, then the **2020 W4 Format** checkbox remains unselected, and existing fields for **Federal Exemptions** and **Federal Filing Status** capture relevant information included in Caregiver Demographic Export Files for Payroll.

Note: Only Federal values are impacted. No change is necessary for the **State Filing Status** and **Exemptions**.

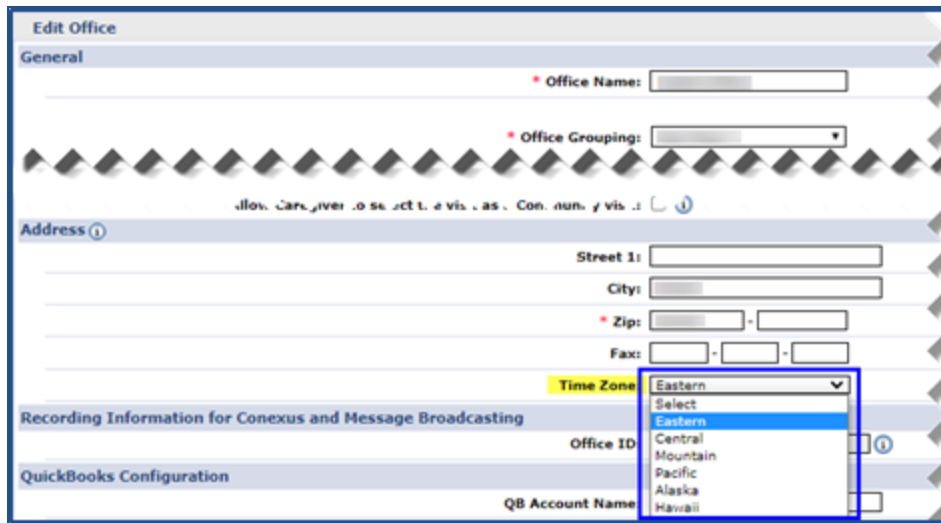
Time Zone Based on Primary Office

The system uses the applicable Time Zone based on the Caregiver’s Primary Office. This ensures that the correct time is captured across the system for certain information such as Caregiver Status, EVV data and Caregiver Notes.

Caregiver Profile pages affected by this feature include:

- Notes
- Absence/Restriction
- Availability
- Expenses
- Document Management
- Caregiver Exclusion/Verification Checks
- Community History
- Physician Profile
- Ops Worklists

To configure the Time Zone in the system, navigate to *Office Setup (Admin > Search Office > Office Setup)*. In the *Edit Office* page, select the applicable Time Zone from the **Time Zone** dropdown field as seen in the following image.



Edit Office: Time Zone Field

Time Zone	Description
EST	Eastern Time Zone (Default setting; automatically selected for a Caregiver's Primary Office)
CST	Central Standard Time
MST	Mountain Standard Time

Time Zone	Description
PST	Pacific Standard Time
AKST	Alaska Standard Time
HAST	Hawaii-Aleutian Standard Time