



Supply and Expense Process Guide

Setup, Billing, and Payroll

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Expense and Supply

Overview

DISCLAIMER

This functionality is intended to invoice expenditures and apply items to payroll that are not categorized as visits. Agencies must work with HHAeXchange to ensure Electronic Billing and Payroll file exports are properly configured in order to be accepted by Payers and Payroll Providers. Please contact [HHAX Support Team](#) for details, setup, and guidance.

The **Expense** and **Supply** functions allow Agencies to bill Payers and reimburse Caregivers for items that are associated with a Patient’s care but are not directly related to a visit.

Expenses	include any costs incurred by a Caregiver while providing service. The cost may be included in an invoice and billed and/or as a reimbursement via Payroll.
Supplies	include items or work provided by an Agency related to a specific Patient’s case. Supplies may be invoiced and billed.

For example, if a Caregiver purchases bandages for a visit, the purchase may be logged as an **Expense**. The **Expense** can then be included as a billable item in an Invoice and as a payable item in payroll. If the Caregiver received bandages directly from their Agency, it would be logged as **Supplies** instead.

This category covers the setup and use of the **Expense**, **Supply**, and **Mileage Event** functionalities. Please direct any questions, thoughts, or concerns regarding the content herein to [HHAeXchange Customer Support](#).

HHAX System Key Terms and Definitions

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

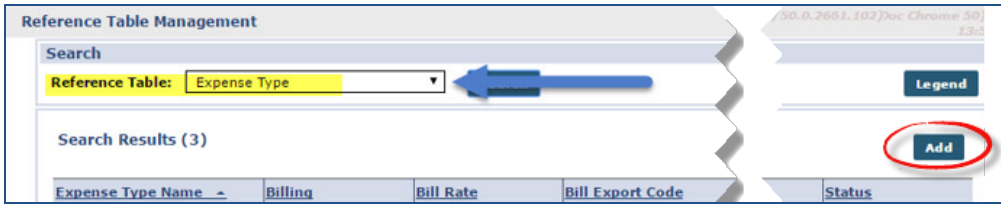
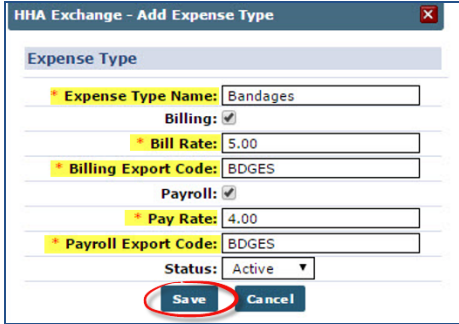
Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.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

Expenses

Expenses include any costs incurred by a Caregiver while providing service. The cost may be included in an invoice and billed and/or as a reimbursement via Payroll. This section covers how to set up expense values, record expenses, and include in billing and payroll.

Setting up Expenses

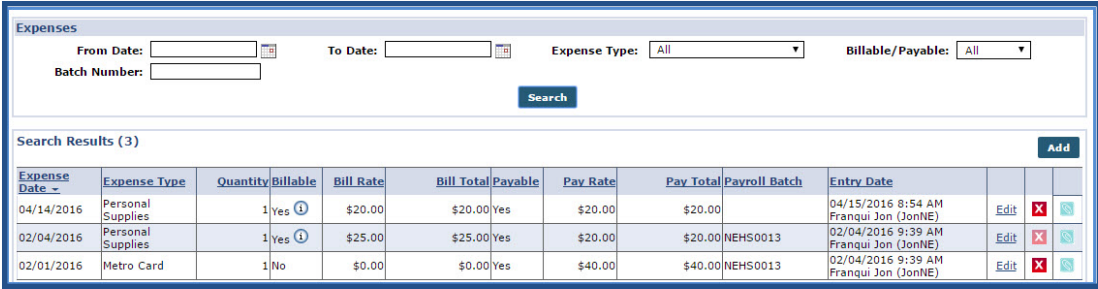
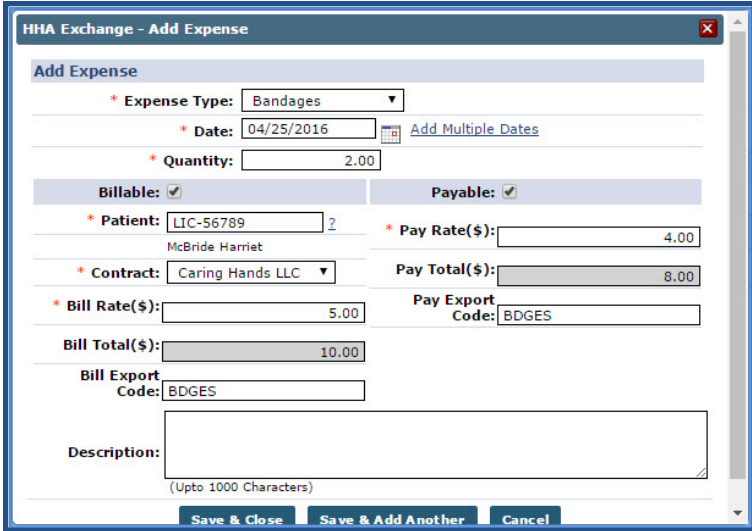
Expenses are set up via the **Reference Table Management** function. Complete the steps below to setup a new expense.

Step	Action				
1	Navigate to Admin > Reference Table Management .				
2	<p>Select <i>Expense Type</i> (under the Caregiver section) from the Reference Table field. Click Add.</p>  <p style="text-align: center;">Adding an Expense Type</p>				
3	<p>The <i>Add Expense Type</i> window opens. Complete the required fields (denoted with a red asterisk), as illustrated in the image and described in the table below. Select the Billing and Payroll check-boxes to designate the new Expense as billable and/or payable.</p> <p><i>Note: Billing and/or Payroll related fields are only required if the corresponding checkbox is selected.</i></p>  <p style="text-align: center;">Add Expense Type Window</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%; text-align: center;">Field</th> <th style="text-align: center;">Enter the...</th> </tr> </thead> <tbody> <tr> <td>*Expense Type Name</td> <td>(Required) Name of the Expense.</td> </tr> </tbody> </table>	Field	Enter the...	*Expense Type Name	(Required) Name of the Expense.
Field	Enter the...				
*Expense Type Name	(Required) Name of the Expense.				

Step	Action										
	<table border="1"> <thead> <tr> <th data-bbox="305 344 652 394">Field</th> <th data-bbox="652 344 1409 394">Enter the...</th> </tr> </thead> <tbody> <tr> <td data-bbox="305 394 652 443">*Bill Rate</td> <td data-bbox="652 394 1409 443">(Required) Billing rate per unit for the Expense.</td> </tr> <tr> <td data-bbox="305 443 652 491">*Billing Export Code</td> <td data-bbox="652 443 1409 491">(Required) Export Code to display on the Invoice.</td> </tr> <tr> <td data-bbox="305 491 652 539">*Pay Rate</td> <td data-bbox="652 491 1409 539">(Required) Pay Rate per unit for the Expense.</td> </tr> <tr> <td data-bbox="305 539 652 588">*Payroll Export Code</td> <td data-bbox="652 539 1409 588">(Required) Export Code to display on Payroll.</td> </tr> </tbody> </table>	Field	Enter the...	*Bill Rate	(Required) Billing rate per unit for the Expense.	*Billing Export Code	(Required) Export Code to display on the Invoice.	*Pay Rate	(Required) Pay Rate per unit for the Expense.	*Payroll Export Code	(Required) Export Code to display on Payroll.
Field	Enter the...										
*Bill Rate	(Required) Billing rate per unit for the Expense.										
*Billing Export Code	(Required) Export Code to display on the Invoice.										
*Pay Rate	(Required) Pay Rate per unit for the Expense.										
*Payroll Export Code	(Required) Export Code to display on Payroll.										
4	Click Save to create the new Expense.										

Adding an Expense

Complete the steps below to add or review an Expense for a Caregiver.

Step	Action												
1	Navigate to Caregiver > Caregiver Search and select the applicable Caregiver.												
2	In the Caregiver Profile, select the Expenses link from the left-navigation menu.												
3	<p>The <i>Expenses</i> page opens. Click the Search button to review Expense records applied to the Caregiver (as illustrated in the image below). Each record contains the expense details to include the following:</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Expense Date</td> <td style="width: 33%;">Bill Rate</td> <td style="width: 33%;">Pay Total</td> </tr> <tr> <td>Expense Type</td> <td>Bill Total</td> <td>Payroll Batch</td> </tr> <tr> <td>Quantity</td> <td>Payable</td> <td>Entry Date</td> </tr> <tr> <td>Billable</td> <td>Pay Rate</td> <td></td> </tr> </table>  <p style="text-align: center;">Expense Page in the Caregiver Profile</p>	Expense Date	Bill Rate	Pay Total	Expense Type	Bill Total	Payroll Batch	Quantity	Payable	Entry Date	Billable	Pay Rate	
Expense Date	Bill Rate	Pay Total											
Expense Type	Bill Total	Payroll Batch											
Quantity	Payable	Entry Date											
Billable	Pay Rate												
4	Click Add to add a new Expense.												
5	<p>The <i>Add Expense</i> window opens. Complete the required fields (denoted with a red asterisk) as illustrated in the image below and described in the table underneath.</p> 												

Step	Action																
	Add Expense Window																
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #003366; color: white;">Field</th> <th style="background-color: #003366; color: white;">Enter the...</th> </tr> </thead> <tbody> <tr> <td style="background-color: #003366; color: white;">*Expense Type</td> <td>(Required) The actual expense. Values in this dropdown are created via the Reference Table Management function.</td> </tr> <tr> <td style="background-color: #003366; color: white;">*Date</td> <td>(Required) The date the expense was incurred.</td> </tr> <tr> <td style="background-color: #003366; color: white;">*Quantity</td> <td>(Required) The number of units included in the expense. <i>Note: The actual amount billed and/or paid is calculated by the Pay Rate and Bill Rate multiplied by the Quantity. When these values are entered, the Billable and/or Payable fields are automatically populated the with the information entered on the Add Expense Type window (refer to the previous section), except for the Patient and Contract fields.</i></td> </tr> <tr> <td style="background-color: #003366; color: white;">*Patient</td> <td>(Required) An Expense must be connected to a Patient to bill. Enter the Patient's Admission ID in this field or use the “?” to the right of the field to perform a Patient search.</td> </tr> <tr> <td style="background-color: #003366; color: white;">*Pay Rate</td> <td>(Required) Pay Rate per unit for the Expense.</td> </tr> <tr> <td style="background-color: #003366; color: white;">*Contract</td> <td>(Required) Select the applicable Contract to receive the bill for the Expense. This dropdown only contains Contracts that are connected to the selected Patient.</td> </tr> <tr> <td style="background-color: #003366; color: white;">*Bill Rate(s)</td> <td>(Required) Billing rate per unit for the Expense.</td> </tr> </tbody> </table>	Field	Enter the...	*Expense Type	(Required) The actual expense. Values in this dropdown are created via the Reference Table Management function.	*Date	(Required) The date the expense was incurred.	*Quantity	(Required) The number of units included in the expense. <i>Note: The actual amount billed and/or paid is calculated by the Pay Rate and Bill Rate multiplied by the Quantity. When these values are entered, the Billable and/or Payable fields are automatically populated the with the information entered on the Add Expense Type window (refer to the previous section), except for the Patient and Contract fields.</i>	*Patient	(Required) An Expense must be connected to a Patient to bill. Enter the Patient's Admission ID in this field or use the “?” to the right of the field to perform a Patient search.	*Pay Rate	(Required) Pay Rate per unit for the Expense.	*Contract	(Required) Select the applicable Contract to receive the bill for the Expense. This dropdown only contains Contracts that are connected to the selected Patient .	*Bill Rate(s)	(Required) Billing rate per unit for the Expense.
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*Bill Rate(s)	(Required) Billing rate per unit for the Expense.																
6	Click the Save & Close to finalize.																

Once saved, the **Expense** is listed as illustrated in the image below.

Expenses

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

Batch Number:

Search Results (5)

Expense Date	Expense Type	Quantity	Billable	Bill Rate	Bill Total	Payable	Pay Rate	Pay Total	Payroll Batch	Entry Date	Edit	X	
04/25/2016	Bandages	2	Yes	\$5.00	\$10.00	Yes	\$4.00	\$8.00		05/13/2016 2:54 PM Franqui Jon (JonNE)	Edit	X	
04/14/2016	Personal Supplies	1	Yes	\$20.00	\$20.00	Yes	\$20.00	\$20.00		04/15/2016 8:54 AM Franqui Jon (JonNE)	Edit	X	
04/05/2016	Bandages	2	Yes	\$5.00	\$10.00	Yes	\$4.00	\$8.00		05/13/2016 2:41 PM Franqui Jon (JonNE)	Edit	X	
02/04/2016	Personal Supplies	1	Yes	\$25.00	\$25.00	Yes	\$20.00	\$20.00	NEHS0013	02/04/2016 9:39 AM Franqui Jon (JonNE)	Edit	X	
02/01/2016	Metro Card	1	No	\$0.00	\$0.00	Yes	\$40.00	\$40.00	NEHS0013	02/04/2016 9:39 AM Franqui Jon (JonNE)	Edit	X	

“Bandages” Expense Applied

Billing and Payroll

Like visits, **Expenses** are billed and applied to payroll. Navigate to the **Billing > New Invoice (Internal)** page. Select the expense to apply to an invoice and click on the **Invoice Batch** button to process.

New Invoice - (Internal) Date: 05/13/2016 Batch Number: Multiple Batch
 Total: Amount: Refresh

Billable Visits
 From Date: [04/23/2016] To Date: [04/29/2016] Office(s): All
 Patient Team: All Patient Location: All Patient Branch: All
 Caregiver Team: All Caregiver Location: All Caregiver Branch: All
 Patient: _____ Contract: All Discipline: All
 (Enter: Last Name, First Name, (Admission ID, MR number) SSN) Charge Type: All

Search Results (6) Page 1 of 1

Date	Caregiver	Admission ID	Patient Name	Office	Contract	Visit	Visit Hrs	Visit Rate	Service Code	Rate Type	Discipline	Billing Units	TT Hrs	TT Rate	Amount
04/25/2016	Anderson Rebecca	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	Expense	N/A	\$5.00	Bandages	Expense	N/A	2.00			\$10.00
04/25/2016	Anderson Rebecca	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	1000-1200	02:00	\$15.00	HHA Standard	Hourly	HHA	8.00			\$30.00
04/26/2016	Anderson Rebecca	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	1000-1200	02:00	\$15.00	HHA Standard	Hourly	HHA	8.00			\$30.00
04/27/2016	Anderson Rebecca	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	1000-1200	02:00	\$15.00	HHA Standard	Hourly	HHA	8.00			\$30.00
04/28/2016	Anderson Rebecca	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	1000-1200	02:00	\$15.00	HHA Standard	Hourly	HHA	8.00			\$30.00
04/29/2016	Anderson Rebecca	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	1000-1200	02:00	\$15.00	HHA Standard	Hourly	HHA	8.00			\$30.00

Buttons: Save, Save & Next, Select All & Save, Unselect All, Invoice Batch, Cancel

Expense Line Item: New Invoice (Internal)

Apply a payment to the **Expense** in the **Cash Posting Module**.

Visit Search

Office(s): Long Island City Invoice Number: _____ Invoice Date From: 5/13/2016 Invoice Date To: <M/d/yyyy>
 Admission ID: _____ Patient First Name: _____ Patient Last Name: _____ Alt. Patient ID: _____
 Visit Date From: <M/d/yyyy> Visit Date To: <M/d/yyyy> Patient Zip Code: _____ Batch Number: _____
 Display Paid Visits: Contract: Caring Hands LLC

Check Summary
 Applied Amount: \$100.00 Balance Amount: \$0.00 Applied From Credit: \$0.00

Search Result (6)

Visit Date	Visit	Service Code	Invoice #	Alt Patient	Admission ID	Patient Name	Office	Billed Hrs	Billed Amt	Adjusted Amount	Paid Amt	Payment	Adjustment	TT Adjust	Write-off	Other Adjust	Not	
04/25/2016	Expense	Bandages	600069	12345	LIC-56789	McBride Harriet	Long Island City	N/A	\$10.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	A
04/25/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	A
04/26/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	A
04/27/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	A
04/28/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	A
04/29/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	A

Expense Line Item: Cash Posting Module

Run Payroll.

Payroll

Batch Number: NEHS0018 Batch Date: 05/13/2016 15:43
 Caregiver Code: LIC-1003 Caregiver Name: Anderson Rebecca
 Payroll Week: 04/24/2016 - 04/30/2016

Current Week (04/24/2016 - 04/30/2016) Created On: [05/13/2016] [15:43:24]

Visit Date	Visit/Expense	Patient Number	Patient Name	Reg Hrs	Daily/Service Code	Pay Rate	Amount	OT Hrs	OT Rate	OT Amount	H Hrs	H Rate	H Amt	Total
04/25/2016	Expense	LIC-56789	McBride Harriet	N/A	Bandages	4.00	\$8.00	N/A			N/A			\$8.00
04/25/2016	1000-1200	LIC-56789	McBride Harriet	02:00	HHA Base	15.00	\$30.00	0:00			0:00			\$30.00
04/26/2016	1000-1200	LIC-56789	McBride Harriet	02:00	HHA Base	15.00	\$30.00	0:00			0:00			\$30.00
04/27/2016	1000-1200	LIC-56789	McBride Harriet	02:00	HHA Base	15.00	\$30.00	0:00			0:00			\$30.00
04/28/2016	1000-1200	LIC-56789	McBride Harriet	02:00	HHA Base	15.00	\$30.00	0:00			0:00			\$30.00
04/29/2016	1000-1200	LIC-56789	McBride Harriet	02:00	HHA Base	15.00	\$30.00	0:00			0:00			\$30.00
Current Week Total:				10:00			\$158.00	00:00		\$0.00	00:00		\$0.00	\$158.00

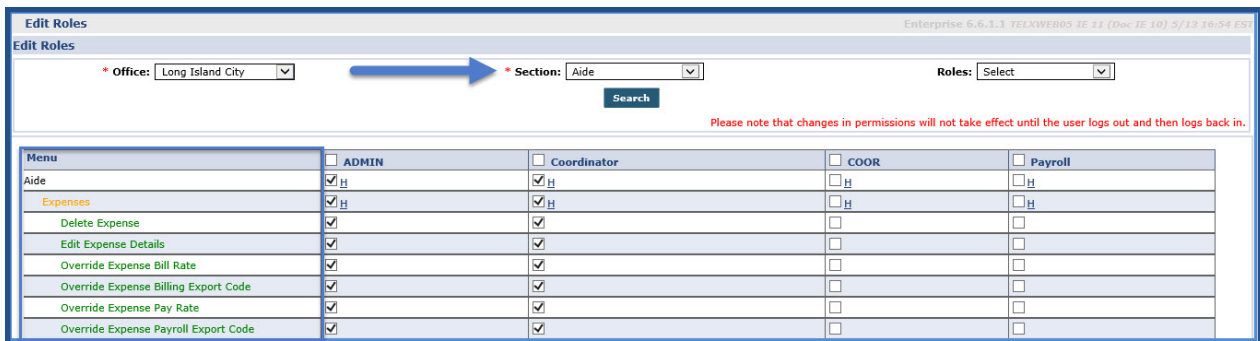
Expense Line Item: Payroll

Expense Permissions

The following are the permissions for the **Expense** functionality.

Permission	Description – Allows Users to...
Override Expense Bill Rate	override the Bill Rate (\$) field on the Add Expense window
Override Expense Billing Export Code	override the Bill Export Code on the Add Expense window
Override Expense Pay Rate	override the Pay Rate (\$) field on the Add Expense window
Override Expense Payroll Export Code	override the Pay Export Code field on the Add Expense window
Edit Expense Details	edit existing records on the Expenses page
Delete Expense	delete existing records on the Expense page

To activate these permissions, navigate to **Admin > User Management > Edit Roles** and select the *Aide* from the **Section** field.



Enterprise 6.6.1.1 TELXIBEROS IE 11 (Doc IE 10) 5/12 16:54 EST

Office: Long Island City Section: Aide Roles: Select

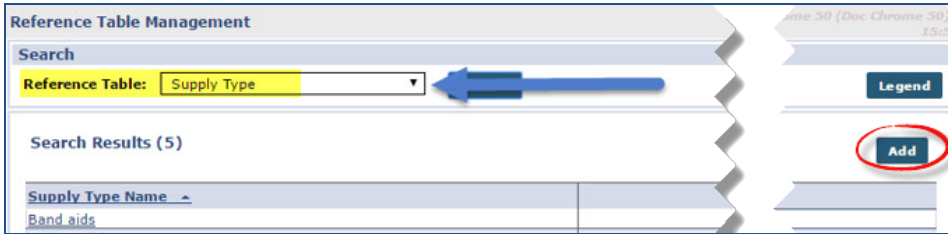
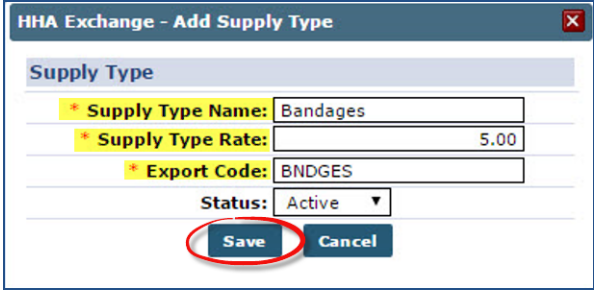
Please note that changes in permissions will not take effect until the user logs out and then logs back in.

Menu	ADMIN	Coordinator	COOR	Payroll
Aide	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expenses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Expense	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Expense Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Expense Bill Rate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Expense Billing Export Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Expense Pay Rate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Expense Payroll Export Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Expense Permissions

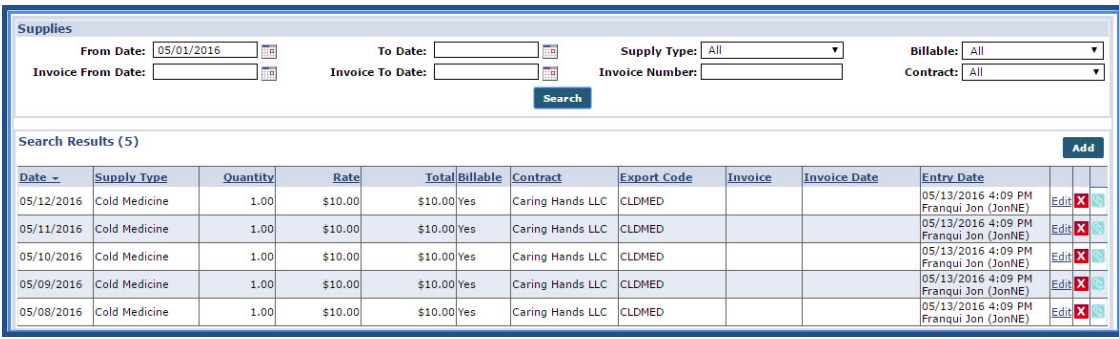
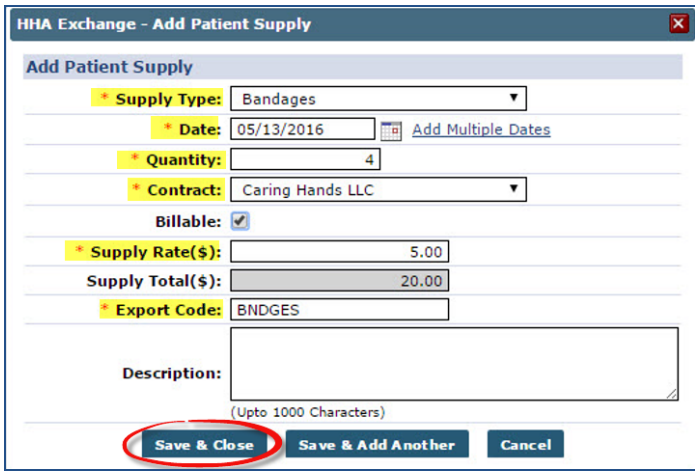
Supplies

Supplies include items or work provided by an Agency related to a specific Patient’s care. **Supplies** may be invoiced and billed; however, cannot be included in Payroll. **Supplies** are set up via the **Reference Table Management** function. Complete the steps below to setup a new expense.

Step	Action								
1	Navigate to Admin > Reference Table Management .								
2	<p>Select <i>Supply Type</i> (under the Patient section) from the Reference Table field. Click Add.</p>  <p style="text-align: center;">Adding an Supply Type</p>								
3	<p>The <i>Add Supply Type</i> window opens. Complete the required fields (denoted with a red asterisk), as illustrated in the image and described in the table below.</p>  <p style="text-align: center;">Add Supply Type Window</p> <table border="1" data-bbox="305 1367 1414 1539"> <thead> <tr> <th>Field</th> <th>Enter the...</th> </tr> </thead> <tbody> <tr> <td>*Supply Type Name</td> <td>(Required) Name of the Supply.</td> </tr> <tr> <td>*Supply Type Rate</td> <td>(Required) Billing rate per unit for the Supply.</td> </tr> <tr> <td>*Export Code</td> <td>(Required) Export Code to display on the Invoice.</td> </tr> </tbody> </table>	Field	Enter the...	*Supply Type Name	(Required) Name of the Supply.	*Supply Type Rate	(Required) Billing rate per unit for the Supply.	*Export Code	(Required) Export Code to display on the Invoice.
Field	Enter the...								
*Supply Type Name	(Required) Name of the Supply.								
*Supply Type Rate	(Required) Billing rate per unit for the Supply.								
*Export Code	(Required) Export Code to display on the Invoice.								
4	Click Save to create the new Supply.								

Adding Supplies

Complete the steps below to add or review a Supply for a Patient.

Step	Action												
1	Navigate to Patient > Patient Search and select the applicable Patient.												
2	In the Patient Profile, select the Supplies link from the left-navigation menu.												
3	<p>The <i>Supplies</i> page opens. Click the Search button to review Supply records applied to the Patient (as illustrated in the image below). Each record contains the expense details to include the following:</p> <table style="margin-left: 40px;"> <tr> <td>Supply Date</td> <td>Total</td> <td>Invoice</td> </tr> <tr> <td>Supply Type</td> <td>Billable</td> <td>Invoice</td> </tr> <tr> <td>Quantity</td> <td>Contract</td> <td>Entry Date</td> </tr> <tr> <td>Rate</td> <td>Export Code</td> <td></td> </tr> </table>  <p style="text-align: center;">Patient Supplies Page</p>	Supply Date	Total	Invoice	Supply Type	Billable	Invoice	Quantity	Contract	Entry Date	Rate	Export Code	
Supply Date	Total	Invoice											
Supply Type	Billable	Invoice											
Quantity	Contract	Entry Date											
Rate	Export Code												
4	Click Add to add a new Supply.												
5	<p>The <i>Add Supply</i> window opens. Complete the required fields (denoted with a red asterisk) as illustrated in the image below and described in the table underneath.</p>  <p style="text-align: center;">Add Supply Window</p>												

Step	Action																		
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #1a3d54; color: white;">Field</th> <th style="background-color: #1a3d54; color: white;">Enter the...</th> </tr> </thead> <tbody> <tr> <td style="background-color: #1a3d54; color: white;">*Supply Type</td> <td>(Required) The type of supply used. Values for this field are created using the Reference Table functionality.</td> </tr> <tr> <td style="background-color: #1a3d54; color: white;">*Date</td> <td>(Required) The date of the visit when the supplies were used.</td> </tr> <tr> <td style="background-color: #1a3d54; color: white;">*Quantity</td> <td>(Required) The amount/how much of the Supply was used.</td> </tr> <tr> <td style="background-color: #1a3d54; color: white;">*Contract</td> <td>(Required) Select the applicable Contract that authorized the visit; to be billed for the supplies.</td> </tr> <tr> <td colspan="2" style="background-color: #1a3d54; color: white;">If the Supply is billable, select the checkbox and complete the following fields.</td> </tr> <tr> <td style="background-color: #1a3d54; color: white;">*Supply Rate(s)</td> <td>(Required) cost of a single supply item.</td> </tr> <tr> <td style="background-color: #1a3d54; color: white;">Supply Total</td> <td>The Supply Rate(s) multiplied by the Quantity</td> </tr> <tr> <td style="background-color: #1a3d54; color: white;">*Export Code</td> <td>(Required) the supplies Export Code.</td> </tr> </tbody> </table>	Field	Enter the...	*Supply Type	(Required) The type of supply used. Values for this field are created using the Reference Table functionality.	*Date	(Required) The date of the visit when the supplies were used.	*Quantity	(Required) The amount/how much of the Supply was used.	*Contract	(Required) Select the applicable Contract that authorized the visit; to be billed for the supplies.	If the Supply is billable, select the checkbox and complete the following fields.		*Supply Rate(s)	(Required) cost of a single supply item.	Supply Total	The Supply Rate(s) multiplied by the Quantity	*Export Code	(Required) the supplies Export Code.
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*Export Code	(Required) the supplies Export Code.																		
6	Click the Save & Close to finalize.																		

Once saved, the **Supply** is listed as illustrated in the image below.

Supplies

From Date: To Date: Supply Type: Billable:
 Invoice From Date: Invoice To Date: Invoice Number: Contract:

Search Results (6)

Date	Supply Type	Quantity	Rate	Total	Billable	Contract	Export Code	Invoice	Invoice Date	Entry Date		
05/13/2016	Bandages	4.00	\$5.00	\$20.00	Yes	Caring Hands LLC	BNDGES			05/13/2016 4:26 PM Franqui Jon (JonNE)	Edit	X
05/12/2016	Cold Medicine	1.00	\$10.00	\$10.00	Yes	Caring Hands LLC	CLDMED			05/13/2016 4:09 PM Franqui Jon (JonNE)	Edit	X
05/11/2016	Cold Medicine	1.00	\$10.00	\$10.00	Yes	Caring Hands LLC	CLDMED			05/13/2016 4:09 PM Franqui Jon (JonNE)	Edit	X
05/10/2016	Cold Medicine	1.00	\$10.00	\$10.00	Yes	Caring Hands LLC	CLDMED			05/13/2016 4:09 PM Franqui Jon (JonNE)	Edit	X
05/09/2016	Cold Medicine	1.00	\$10.00	\$10.00	Yes	Caring Hands LLC	CLDMED			05/13/2016 4:09 PM Franqui Jon (JonNE)	Edit	X
05/08/2016	Cold Medicine	1.00	\$10.00	\$10.00	Yes	Caring Hands LLC	CLDMED			05/13/2016 4:09 PM Franqui Jon (JonNE)	Edit	X

“Bandages” Supply Applied

Billing for Supplies

Supplies are billed identically to visits. From the **Billing > New Invoice (Internal)** page, select the **Supply** line item and apply it to an invoice.

New Invoice - (Internal) Date: 05/13/2016 Total: Amount: Refresh Batch Number: Multiple Batch

Billable Visits

From Date: [] To Date: 5/13/2016 Office(s): All

Patient Team: All Patient Location: All Patient Branch: All

Caregiver Team: All Caregiver Location: All Caregiver Branch: All

Patient: [] Contract: All Discipline: All

(Enter: Last Name, First Name, (Admission ID, MR number) SSN) Charge Type: All

Search Generate All Invoices Page Loaded in 0.221 second(s).

Date	Caregiver	Admission ID	Patient Name	Office	Contract	Visit	Visit Hrs	Visit Rate	Service Code	Rate Type	Disciplines	Billing Units	TT Hrs	TT Rate	Amount
05/13/2016	N/A	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	Supply	N/A	\$5.00	Bandages	Supply	N/A	4.00			\$20.00
05/12/2016	N/A	LIC-56789	McBride Harriet	Long Island City	Caring Hands LLC	Supply	N/A	\$10.00	Cold Medicine	Supply	N/A	1.00			\$10.00
05/05/2016	Casey Myra	CIT-900049	Conway Mike	Citi Caregivers	Heaven's Care	1000-1500	05:00	\$20.00	HHA Hourly Reg	Hourly	HHA	5.00			\$100.00
05/05/2016	Wade Brandy	CIT-2000003	Walton Brett	Citi Caregivers	Amazing Health	1000-1200	02:00	\$20.00	HHA Hrly	Hourly	HHA	2.00			\$40.00
05/04/2016	Wade Brandy	CIT-2000003	Walton Brett	Citi Caregivers	Amazing Health	1000-1200	02:00	\$20.00	HHA Hrly	Hourly	HHA	2.00			\$40.00
05/04/2016	Casey Myra	CIT-900049	Conway Mike	Citi Caregivers	Heaven's Care	1000-1500	05:00	\$20.00	HHA Hourly Reg	Hourly	HHA	5.00			\$100.00

Supply Line Items: New Invoice (Internal)

Apply a payment to the **Supply** in the **Cash Posting Module**.

HHA Cash Posting Search Payment New Payment New Refund Search Invoice Bulk Adjustments Close

Enterprise 6.5.9.9 TELXWEB00

Receive Payments

Check Info Ref/Check No: 876789 Payment Method: Check Type: Contract Payer: Caring Hands LLC

Most Recent Update Date: 05/13/2016 Most Recent Update By: Amount: \$100.00 Date: 5/13/2016

Retention & Recruitment: \$0.00 Check Status: Open Under Payment: \$0.00 Deposit Date: 5/13/2016

Memo: [] Payment Info

Applied Amount: \$90.00 Balance Amount: \$10.00 Place on Credit: \$0.00 (\$0.00) H Credit Available: \$2,160.00 (\$45.00)

Export Legend

Visit Date	Visit	Service Code	Invoice #	Alt Patient	Admission ID	Patient Name	Office	Billed Hrs	Billed Amt	Adjusted Amount	Paid Amt	Payment	Adjustment	TT Adjust	Write-off	Other Adjust	Note(s)/Fc	
04/25/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+
04/27/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$10.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+
04/29/2016	1000-1200	HHA Stand	600069	12345	LIC-56789	McBride Harriet	Long Island City	02:00	\$30.00	\$0.00	\$20.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+
05/12/2016	Supply	Cold Medic	600070	12345	LIC-56789	McBride Harriet	Long Island City	N/A	\$10.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+
05/13/2016	Supply	Bandages	600070	12345	LIC-56789	McBride Harriet	Long Island City	N/A	\$20.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+

Add Save Post Unpost Close

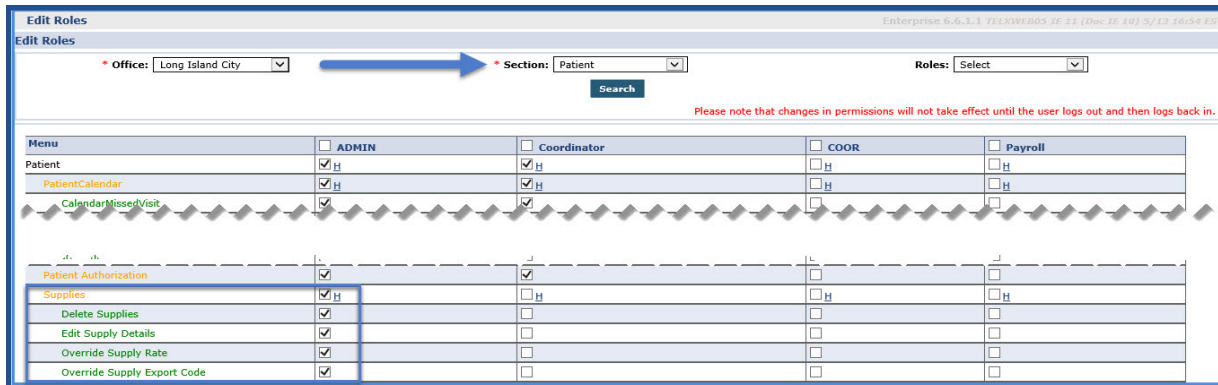
Supply Line Items: Cash Posting Module

Supply Permissions

The following are the permissions for the **Supply** functionality.

Permission	Description – Allows Users to...
Override Supply Rate	edit the value in the Supply Rate field in the Add Patient Supply window
Override Supply Export Code	edit the value in the Export Code field in the Add Patient Supply window
Edit Supply Details	edit existing records on the Supplies page
Delete Supplies	delete existing records on the Supplies page

To activate these permissions, navigate to **Admin > User Management > Edit Roles** and select *Patient* from the **Section** field.



Office: Long Island City Section: Patient Roles: Select Search

Please note that changes in permissions will not take effect until the user logs out and then logs back in.

Menu	ADMIN	Coordinator	COOR	Payroll
Patient	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PatientCalendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CalendarMissedVisit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patient Authorization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Supplies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Supply Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Supply Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Override Supply Export Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Supply Permissions

Mileage Events

DISCLAIMER

This feature is applicable only to Providers who are using the ***new*** Prebilling optimization features. Please contact [HHAX Support Team](#) for details, setup, and guidance.

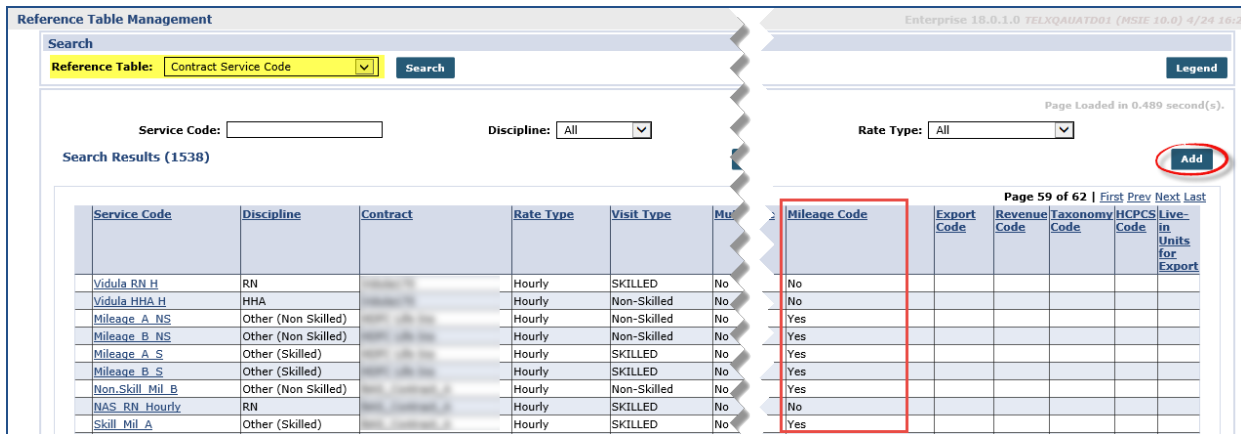
A **Mileage Event** refers to when a Caregiver runs errands for a Patient during service. To properly document and track Mileage Events, manual and automated processes have been created to allow Providers to bill associated Contracts and pay Caregivers for Mileage Events entered via EVV.

In such cases, the Caregiver enters the number of miles via a Duty Code at Clock-OUT. This Duty Code value is then converted into a Mileage Event using a **Default Service Code** and a **Default Mileage Pay Code**. Mileage Events apply to both Skilled and Non-Skilled Caregivers.

Mileage Service Code

The *Mileage Service Codes* are created and managed via the *Reference Table Management* function (**Admin > Reference Table Management**). To access, select *Contract Service Code* from the **Reference Table** field and click **Search**. A **Mileage Code** column has been added to indicate if a Service Code/Contract is associated to Mileage, as seen in the following image.

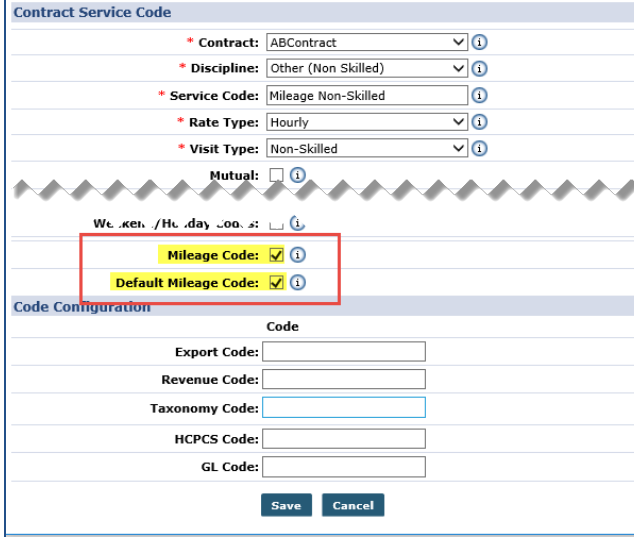
Click the **Add** button to create a new Service Code or edit an existing one by clicking on the [Service Code](#) (link).



Reference Table: Contract Service Code / Mileage Code

The *Contract Service Code* window opens. To associate a Contract with Mileage, two fields titled **Mileage Code** and **Default Mileage Code** have been added to the *Contract Service Code* window, as illustrated in the image below. Complete the required fields as described in the table below. The **Mileage Code** checkbox must be selected to enable the **Default Mileage Code** checkbox.

Only one **Mileage Code** can be made default per *Discipline* per *Contract*.



The screenshot shows the 'Contract Service Code' window. It contains several dropdown menus for 'Contract', 'Discipline', 'Service Code', 'Rate Type', and 'Visit Type'. Below these is a 'Mutual' checkbox and a 'Weeks / Hourly Code' dropdown. A red box highlights the 'Mileage Code' and 'Default Mileage Code' checkboxes, both of which are checked. Below this is a 'Code Configuration' section with input fields for 'Export Code', 'Revenue Code', 'Taxonomy Code', 'HCPCS Code', and 'GL Code'. 'Save' and 'Cancel' buttons are at the bottom.

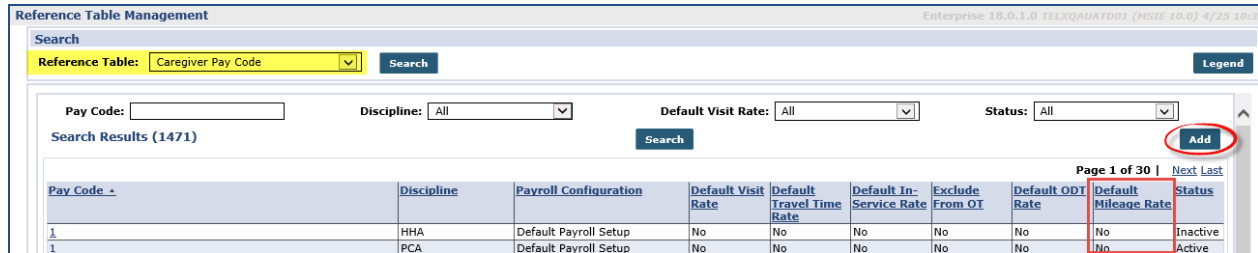
Contract Service Code Window: Mileage Codes

Field	Description
*Contract	(Required) Select the Contract
*Discipline	(Required) Select accordingly: <i>Other (Skilled)</i> or <i>Other (Non-Skilled)</i>
*Service Code	(Required) Enter a Service Code Name
*Rate Type	(Required) Select <i>Hourly</i> (rates are based on an hourly basis)
*Visit Type	(Required) Select the Visit Type from the dropdown

Note: Multiple Mileage Service Codes can be created for a Contract; therefore the **Default Mileage Code** must be selected to create an Automatic Mileage Event.

Caregiver Pay Code

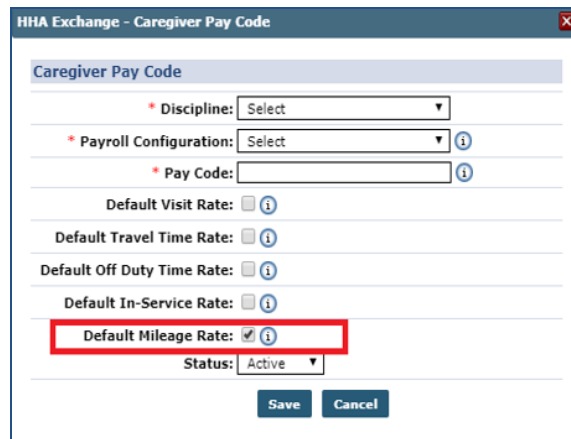
Once the **Mileage Code/Default Mileage Code** is enabled for the Contract, then a Caregiver Pay Rate must be created. Navigate to **Admin > Reference Table Management**. Select **Caregiver Pay Code** from the **Reference Table** dropdown field and click **Search**.



Reference Table: Caregiver Pay Code

Note: A new **Default Mileage Rate** column has been added to the grid table to indicate if a Default Mileage Rate is associated to the Pay Code.

The **Caregiver Pay Code** window opens. Complete the required fields: **Discipline**, **Payroll Configuration**, and **Pay Code** (denoted with a red asterisk). Select the **Default Mileage Rate** checkbox to assign this Pay Code as the default mileage Pay Code. Click **Save**.

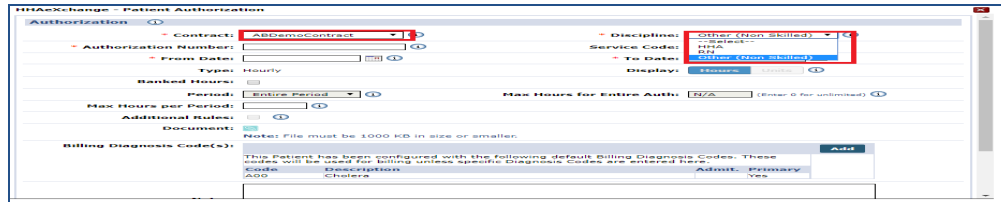


Caregiver Pay Code Window

Once saved, this Pay Code is applied to any automated Mileage Event created in the system.

Mileage Authorization

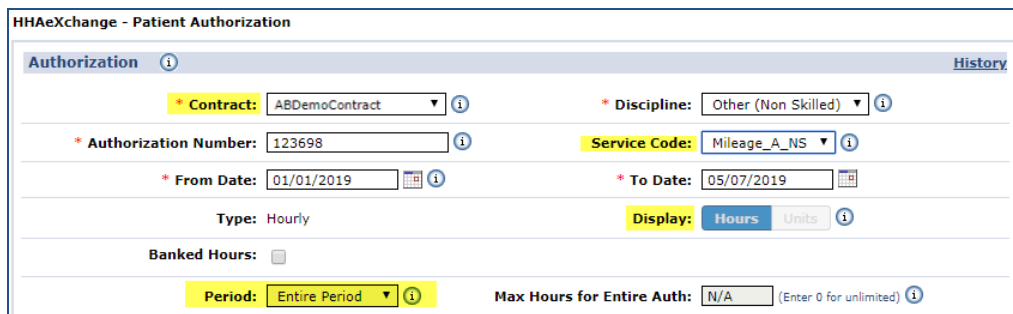
When a Contract has a Service Code set up for Mileage, the service bypasses the Patient Discipline **Accepted Services** and is made available for all Patients under that Contract's Authorizations.



Patient Authorization: Discipline

- If only *Skilled* services are accepted for the Patient, then only applicable Disciplines to include *Other (Skilled)* are displayed in the dropdown menu.
- If only *Non-Skilled* services are accepted for the Patient, then only applicable Disciplines to include *Other (Non-Skilled)* are displayed in the dropdown menu.
- If both *Skilled* and *Non-Skilled* services are accepted for the Patient, then both are included in the menu. If the Mileage Code is only applied for *Other (Skilled)* on the contract, then only that option displays in the menu.

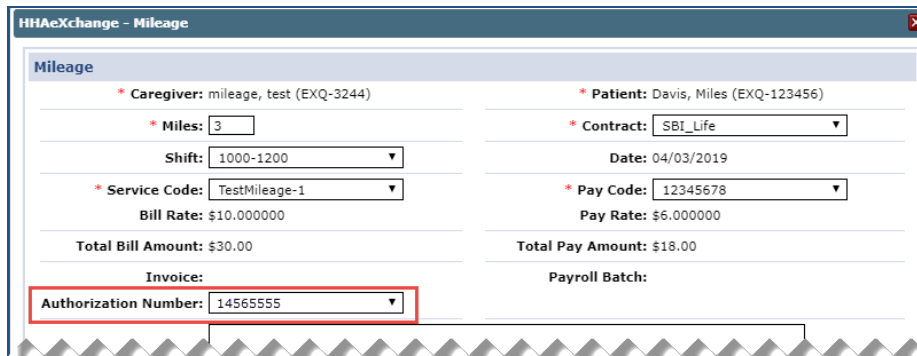
When the Mileage Service Code is selected as the **Service Code** for an Authorization, the **Display** and **Period** fields are locked with *Hours* and *Entire Period* pre-selected for respective fields (as seen in the following image).



Display and Period Fields

Authorization Number

When creating a **Mileage Event**, the **Authorization Number** is displayed in the dropdown field if an Authorization(s) exists for the selected *Patient*, *Contract*, *Service Code* and *Mileage Date*.



Mileage Window

The pre-selected **Authorization Number** is the one which the mileage is applied based on the selected *Patient, Contract, Service Code, and Mileage Date*.

If an Authorization Number is manually selected from the dropdown, then that Authorization is selected for mileage. However, if the selected Authorization does not have remaining Hours (Total Units – Used Units in mileage), then the mileage is not Authorized (and highlighted pink on the Patient and Caregiver Calendars).

If the Hours are available for multiple matching Authorizations, then the system applies the mileage to the first created Authorization.

Authorization Number Report

In the Patient Authorizations/Orders page, click on the [Authorization Number](#) (link) for the Contract to access the *Patient Mileage Authorization* window (as illustrated below). Herein view a summary of all mileage-related information such as **Allocated** (Units/Hours) and **Units (Hours) Left** for the selected Contract.



From	To	Auth Units	Mileage Units	Allocated	Units Left
01/01/2019	03/31/2019	20.00	1.00	1.00	19.00

Patient Mileage Authorization Report

Authorization Recalculation

When an Authorization or Mileage is edited, the system recalculates the Authorization as follows:

Action (If)...	System Behavior (Then...)
Add/Edit Authorizations	The system recalculates all mileage that applies to the added/edited Authorization accordingly.
Delete Authorization	All mileage associated with the deleted Authorization becomes Unauthorized.
Click Update Link (List of Authorizations)	The system to recalculates all unauthorized mileage.

Creating a Mileage Event

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

Automatic Creation

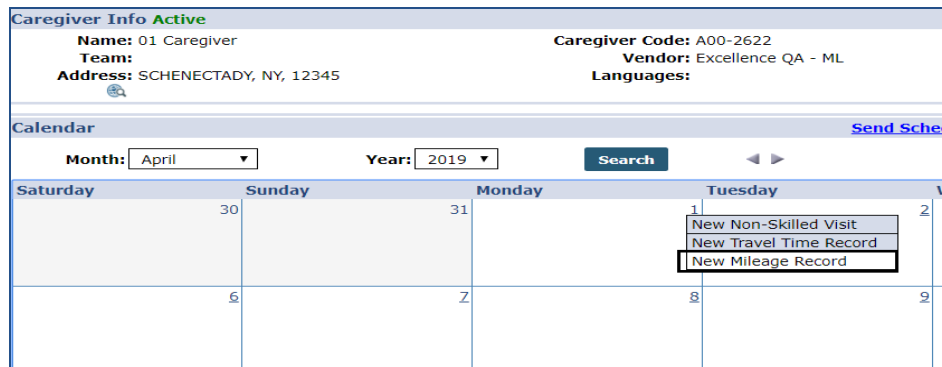
A Mileage Event is automatically created when a Caregiver logs mileage via a Duty Code upon a visit Clock-OUT. Once logged, the Mileage is reflected in both the Patient and Caregiver Calendars. A POC must be setup for mileage. Contact the [HHAX Support Team](#) to create a Mileage POC.

Note: Mileage cannot be edited on the Mobile App after Clock-OUT. Once Clocked-OUT, the miles can only be edited manually from the HHAX application.

Manual Creation

Caregiver Calendar

Navigate to **Caregiver > Calendar**. Click on the applicable date and select **New Mileage Record** from the dropdown (as illustrated in the image below).



Caregiver Calendar

The *Mileage* window opens. Complete the required fields (denoted with red asterisk), described in the table below. Refer to the [Mileage Authorization](#) section for details, as needed.


HHAEExchange - Mileage

Mileage

* Caregiver: Alan, Johnson (EXQ-2614)	* Patient: 001, Patient (HHA-9000205985385044)
* Miles: <input type="text" value="2"/>	* Contract: <input type="text" value="AB Contract"/>
Shift: <input type="text" value="0900-1000"/>	Date: 04/02/2019
* Service Code: <input type="text" value="NS-Mileage"/>	* Pay Code: <input type="text" value="NAS_Non.Skilled_Mileage"/>
Bill Rate: \$ 300.00000	Pay Rate: \$10.000000
Total Bill Amount: \$300.00	Total Pay Amount: \$20.00
Invoice:	Payroll Batch:
Authorization Number: <input type="text" value="12345678"/>	
Note: <input type="text"/>	
<small>Note: Upto 1000 Characters.</small>	
<input type="button" value="Save"/> <input type="button" value="Close"/>	

Caregiver Mileage

Field	Description
* Caregiver	(Required) The Caregiver field is pre-populated.
* Patient	(Required) Select/Search for the applicable Patient OR select the Shift from dropdown field for the respective Patient to auto-populate.
* Miles	(Required) Enter the number of miles.
* Contract	(Required) Select the associated Contract.
* Service Code	(Required) Select the applicable Service Code . The Bill Rate is calculated based on selected Service Code.
* Pay Code	(Required) Select the Pay Code . The Pay rate is calculated on the selected Pay Code.
Total Bill Amount	Auto-calculated (Miles x Bill Rate)
Total Pay Amount	Auto-calculated (Miles x Pay Rate)
Authorization Number	Populates if an Authorization(s) exists for the selected <i>Patient, Contract, Service Code</i> and <i>Mileage Date</i> . Refer to the Authorization Number section for details.

Once saved, the Mileage shows up on the Patient and Caregiver Calendar (as illustrated in the following). To edit, click on the [M](#): link to open the Mileage window. The **B**: indicates if the mileage has been billed and the **P**: indicates if it applies to Payroll. If not billed, mileage can be deleted by clicking the delete icon (.

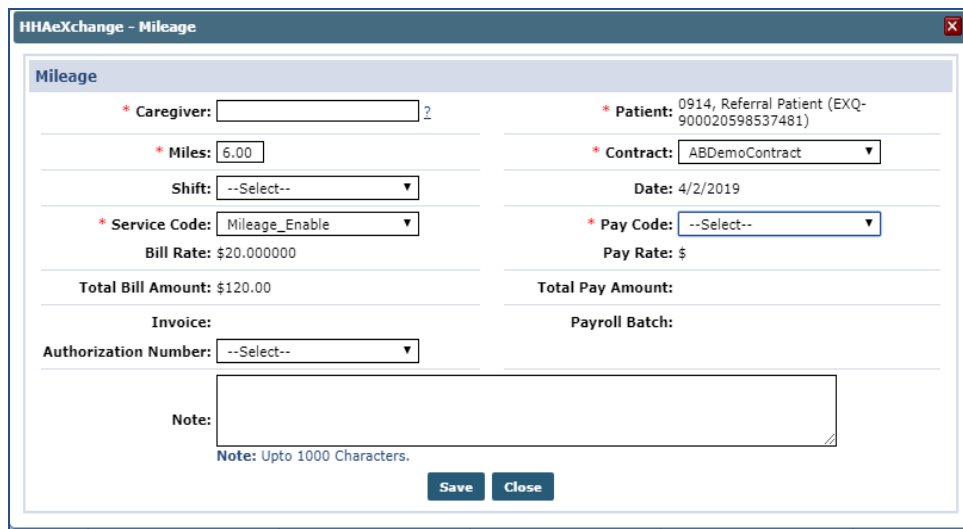
1	2
<p>M: 11.00 B: N P: N ✖</p> <hr/> <p>M: 6.00 B: N P: N ✖</p> <hr/> <p>M: 15.00 B: N P: N ✖</p>	

Mileage on Caregiver Calendar

Patient Calendar

Creating a Mileage Event on the Patient Calendar is the same as with the Caregiver Calendar (described above). Navigate to **Patient > Calendar**. Click on the applicable date and select **New Mileage Record** from the dropdown.

The *Mileage* window opens displaying the same fields. In this case, however, the **Patient** field is pre-populated. Select/Search for the applicable Caregiver OR select the **Shift** from dropdown field for the respective Caregiver to auto-populate.



Patient Calendar > Mileage