



# Family Portal (Agency) Process Guide

Configuration and Management in HHAX

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# Family Portal (Agency)

## Overview

### DISCLAIMER

**Important Note:** The **Family Portal** allows connected family members to view Patient demographics, address, visit and task information. It is the Agency's responsibility to ensure their internal policies for granting access to this information meet all relevant privacy and security regulations. HHAX Customer Support, *under no circumstances*, is permitted to add or edit Family Portal accounts or settings.

Agencies can create accounts for a Patient's family members and advocates via the **Family Portal**, where the group can post messages concerning the Patient's care and condition. Family members and advocates can also send messages through the **Family Portal** directly to the Agency. This category covers the **Family Portal** functionality configured and managed in the HHAeXchange (HHAX) system including how to register family members to the Portal as well as sending announcements at an Agency level.

Refer to the [Family Portal \(User\) category](#) for details on how family members and advocates navigate and use the Family Portal.

Please direct any questions, thoughts, or concerns regarding the content herein to [HHAeXchange Customer Support](#).

## HHAX System Key Terms and Definitions

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

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


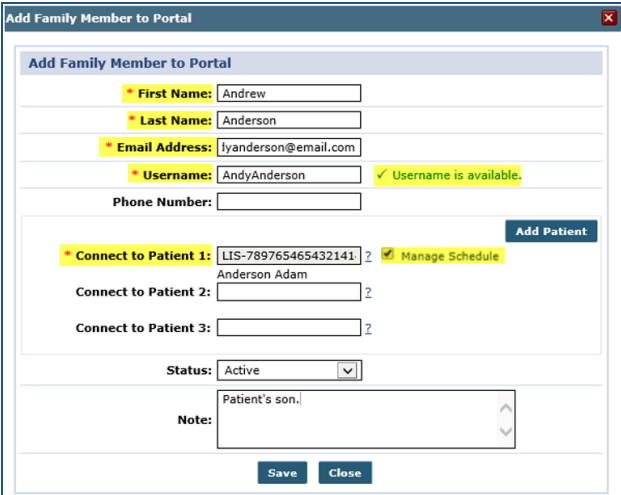
# Family Portal

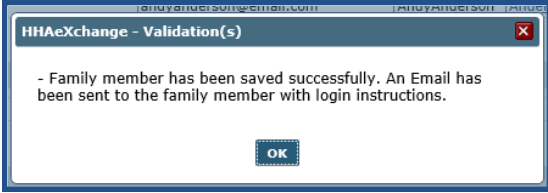
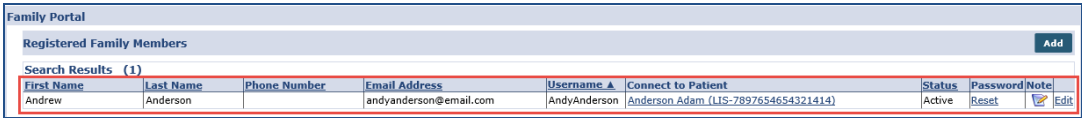
**Tip:** You can press **Ctrl-F** on your keyboard to search this topic.

The **Family Portal** page (*Patient > Family Portal*) allows Agencies to better communicate with a Patient's family members. Login accounts for the family members can be created via the Family Portal page for them to access communications from the Agency as well as visit information for the Patient.

## Registering Family Members



Complete the following steps to add members to a Patient's **Family Portal**.

Step	Action
1	Navigate to <i>Patient &gt; Family Portal</i> .
2	<p>Click the <b>Add</b> button in the Registered Family Members section.</p>  <p style="text-align: center;"><b>Adding Family Members to Family Portal</b></p>
3	<p>The <i>Add Family Member to Portal</i> window opens. Complete the required fields (denoted by red asterisk), as illustrated in the image. A valid email address must be provided per member to receive messages to include the login confirmation and instructions. Usernames must be unique and cannot be the same as the email address.</p>  <p style="text-align: center;"><b>Adding Family Member</b></p> <p>The family member must be connected to at least one Patient at the Agency. If connected to multiple Patients (such as a mutual pairing), they can navigate between those Patients from the Family Portal. If the family member needs to be connected to more than three Patients, click the <b>Add Patient</b> button to open additional Patient selection fields.</p>

Step	Action
	<p>Select the <b>Manage Schedule</b> checkbox to enable the family member to request schedule changes and raise concerns. Refer to the <a href="#">Enabling the Manage Schedule Functionality for Family Members</a> section for further details.</p> <p>Click <b>Save</b>.</p>
4	<p>Upon saving, a confirmation message appears alerting the user that the newly added member has been saved successfully.</p> <p>The family member receives an email with login instructions. Click <b>OK</b> to close.</p>  <p style="text-align: center;"><b>Adding Family Member</b></p>
5	<p>The family members information appears as illustrated below. Repeat instructions to add other members to the portal.</p>  <p style="text-align: center;"><b>Added Family Member</b></p>

## Family Portal Announcements

The *Announcements* section houses communications sent by the Agency on a global level (to all Family Portals) or to individual portals. Each line item indicates the **Date/Time** of the message, the **Recipients** (click link to view specifics), the **Subject** of the message, the actual **Message**, and the **Status**. The attachment (paperclip) icon indicates if an attachment is available (if green in color). Click the [H](#) link to view any message history.

Announcements						
Search Results (2)						
Date/Time	Recipients	Subject	Message	Status		
08/27/2018 14:48 PM	<a href="#">[Multiple]</a>	Labor Day Holiday	Please be advised that our offices will be closed on <b>Labor Day, Monday, September 3rd</b> . Emergency staff will be on call. Feel free to contact our offices via <a href="mailto:agency@email.com">agency@email.com</a> or 555-555-5555 if any questions or concerns. Thank you.	Sent		<a href="#">H</a>
08/27/2018 13:16 PM	<a href="#">[Multiple]</a>	Test results are available.	Dear Family, Test results are in and available for discussion. Please contact our Agency to schedule an appointment at your earliest convenience. Thank you.	Sent		<a href="#">H</a>

**Family Portal Announcements Section**

## Family Portal Wall Posts

The *Wall Posts* section contains posted messages from the Agency on the Family Portal. Click the **Add** button to create a post. The columns are like those in the *Announcements* section with additional functions to *recall* and/or *delete* the message.

Wall Posts							<b>Add</b>
Search Results (1)							
Date/Time	Recipients	Wall Post	Status				
08/27/2018 11:45 AM	Adam, Anderson	The Caregiver has informed us that your father has really improved over the past two week. We are so happy is finally feeling better!	Sent	Recall	H	X	

Family Portal Wall Posts Section

## Family Portal Messages

The *Messages* section is used to send a message to the family member group or a specific member. Click the **Send** button to create and send the message. Once sent, the message appears under the Messages section.

Messages							<b>Send</b>
Search Results (1)							
Read	Date/Time	Sender	Recipients	Subject	Message	Status	
	08/27/2018 11:50 AM	⇒ Agency	Andrew Anderson	DNR questions	Please be advised that your father recently signed a DNR and asked that you be made aware. If any questions, please feel free to contact the Agency.	Sent	Recall H X

Family Portal Messages

# Family Portal Global Management

Aside from the Patient tab, the Family Portal is also managed under the Admin tab (*Admin > Family Portal Global Management*), as illustrated in the image below. The Family Portal Global Management functionality allows one to view Registered Members, create Announcements, and manage Wall Posts at an Agency-wide level.



Admin > Family Portal Global Management

## Registering Family Members

As previously covered in the Patient tab, family members can also be registered via the *Family Portal Global Management* page. Click the **Add** button to register new members and follow the instructions in the previous section.

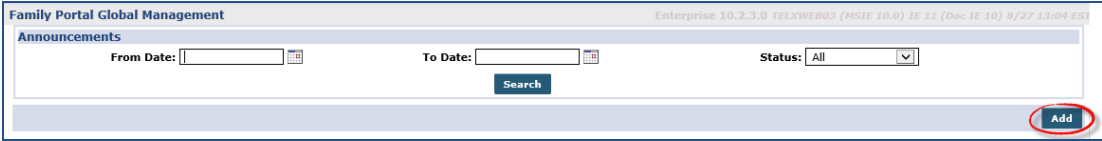
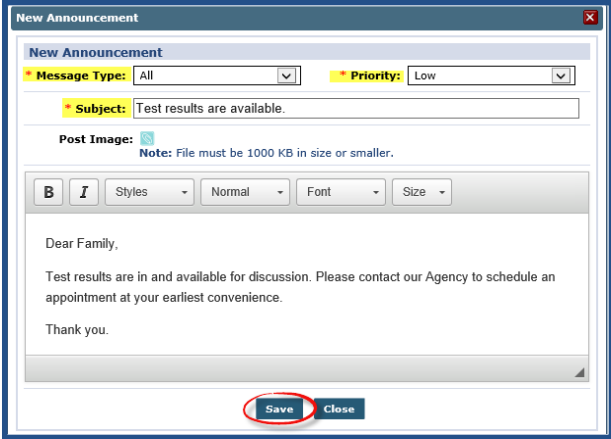
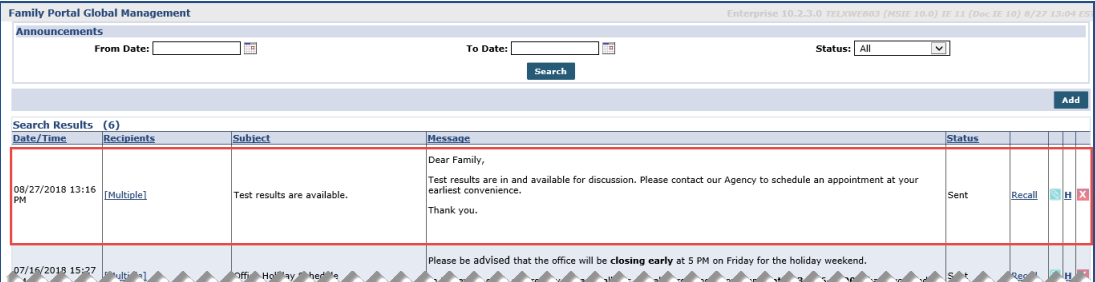


Family Portal Global Page

On this page, search for a Patient to view the family members connected to the Patient. Click [Edit](#) (hyperlink) to update a family member's profile or click [Reset](#) (hyperlink) to reset a family member's password.

# Creating Announcements

Announcements are messages that an Agency transmits to the Family Portal pages of registered Family Members. Announcements can be sent to all family members or select individuals in the group. Complete the following steps to send an Announcement via the Family Portal Global Management function.

Step	Action															
1	Navigate to <b>Admin &gt; Family Portal Global Management &gt; Announcements.</b>															
2	<p>Click the <b>Add</b> button (as seen in the image).</p>  <p style="text-align: center;"><b>Creating a New Announcement</b></p>															
3	<p>The <i>New Announcement</i> window opens. Complete the required fields (denoted by a red asterisk) as illustrated in the image below. Select the <b>Message Type</b> (to all members or an individual), select the <b>Priority</b> level and enter a <b>Subject</b> in the text field. (Optional) To attach an image or supporting document, click the paperclip icon. Enter the announcement and click the <b>Save</b> button to send.</p>  <p style="text-align: center;"><b>Family Portal New Announcement</b></p>															
4	<p>The Announcement appears on the Portal Management page as well as in the Patient's Family Portal page. From this page, one can also <i>recall</i> the announcement or <i>delete</i>, if needed.</p>  <table border="1" data-bbox="305 1738 1393 1892"> <thead> <tr> <th>Date/Time</th> <th>Recipients</th> <th>Subject</th> <th>Message</th> <th>Status</th> </tr> </thead> <tbody> <tr style="border: 2px solid red;"> <td>08/27/2018 13:16 PM</td> <td>[Multiple]</td> <td>Test results are available.</td> <td>Dear Family, Test results are in and available for discussion. Please contact our Agency to schedule an appointment at your earliest convenience. Thank you.</td> <td>Sent Recall [H] [X]</td> </tr> <tr> <td>07/15/2018 15:27</td> <td>[Multiple]</td> <td>Offi Holiday</td> <td>Please be advised that the office will be <b>closing early</b> at 5 PM on Friday for the holiday weekend.</td> <td>Sent Recall [H] [X]</td> </tr> </tbody> </table>	Date/Time	Recipients	Subject	Message	Status	08/27/2018 13:16 PM	[Multiple]	Test results are available.	Dear Family, Test results are in and available for discussion. Please contact our Agency to schedule an appointment at your earliest convenience. Thank you.	Sent Recall [H] [X]	07/15/2018 15:27	[Multiple]	Offi Holiday	Please be advised that the office will be <b>closing early</b> at 5 PM on Friday for the holiday weekend.	Sent Recall [H] [X]
Date/Time	Recipients	Subject	Message	Status												
08/27/2018 13:16 PM	[Multiple]	Test results are available.	Dear Family, Test results are in and available for discussion. Please contact our Agency to schedule an appointment at your earliest convenience. Thank you.	Sent Recall [H] [X]												
07/15/2018 15:27	[Multiple]	Offi Holiday	Please be advised that the office will be <b>closing early</b> at 5 PM on Friday for the holiday weekend.	Sent Recall [H] [X]												



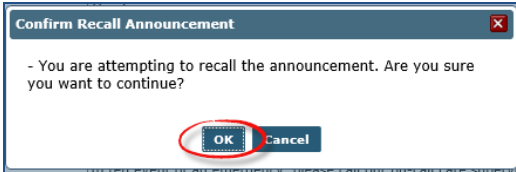
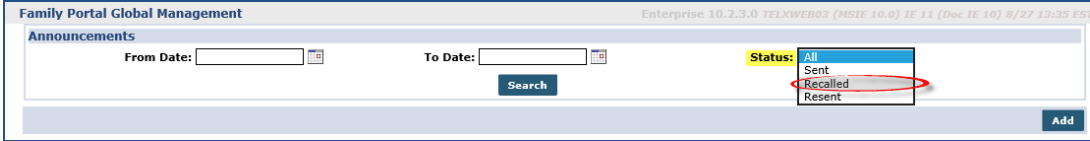
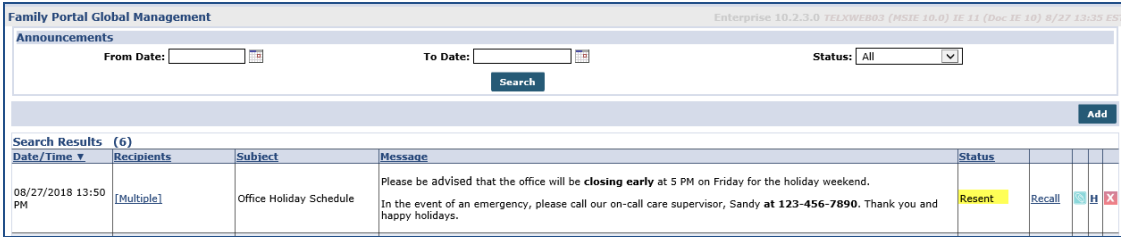
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Step	Action
	Sent Announcement

## Recalling/Resending an Announcement

Recalling an announcement removes the communication from the Family Portals. Once recalled, the delete option (✖) is enabled. One can edit any attachment, if applicable and view the communication history. Hovering over the Recipients link displays the family members' names.

Complete the following steps to *recall*, *resend*, or *delete* an issued announcement.

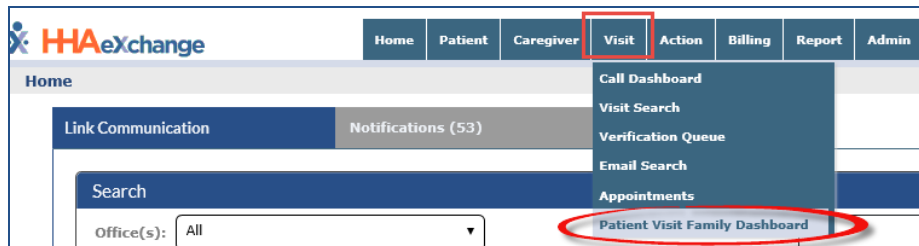
Step	Action
1	Navigate to <b>Admin &gt; Family Portal Global Management &gt; Announcements</b> .
2	Search for the applicable announcement. Use the search filters to narrow results, if needed.
3	<p>A <i>Confirm Recall Announcement</i> appears. Click <b>OK</b> to confirm the recall. Thereafter, the status changes to <b>Resend</b>.</p>  <p>The dialog box contains the text: "Confirm Recall Announcement", "- You are attempting to recall the announcement. Are you sure you want to continue?", and buttons for "OK" and "Cancel". The "OK" button is circled in red.</p>
4	<p>Using the search filters, select <i>Recalled</i> from the <b>Status</b> field.</p>  <p>The screenshot shows the "Family Portal Global Management" interface with search filters for "From Date", "To Date", and "Status". The "Status" dropdown menu is open, and "Recalled" is selected and circled in red.</p> <p style="text-align: center;"><b>Recalled Announcements</b></p>
5	<p>From the options, one can either <i>Resend</i> the message as is or click the delete icon (✖) to delete from the announcement list and recreate the message. If resent, the announcement appears at the top of a search with the current date.</p>  <p>The screenshot shows a table of search results for announcements. The first row is highlighted, showing a message about an office holiday schedule. The "Status" column for this row has a yellow "Resent" button, a "Recall" button, and a delete icon (✖).</p> <p style="text-align: center;"><b>Resent Announcement</b></p> <p><b>Note:</b> A deleted Announcement cannot be recovered or resent.</p>

# Managing the Family Portal via the Family Dashboard in HHAX

## DISCLAIMER

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

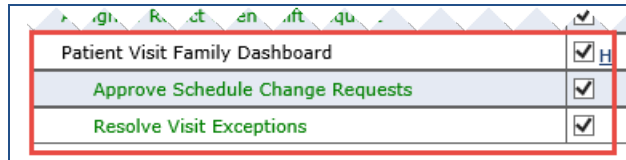
The Family Portal is managed by the Agency on the HHAX system. Navigate to **Visit > Patient Visit Family Dashboard** to access the Family Dashboard and manage *Schedule Visit Change Requests* and *Raised Concerns* requests made by Patients and Patient advocates. Schedule changes can be approved or rejected before billing takes place.



Visit > Patient Visit Family Dashboard

# Permissions: Family Dashboard

System users must have the **Patient Visit Family Dashboard** permissions enabled as illustrated on the image below and described in the table below the image. To enable, navigate to **Admin > User Management > Edit Roles**. Under the **Section** field, select **Visit** and applicable **Roles** (to assign).



Patient Visit Family Dashboard Permissions

Permission	To...
Patient Visit Family Dashboard	Access and view the Patient Visit Family Dashboard
Approve Schedule Change Requests	Manage and approve Family Member Schedule Visit Change Requests
Resolve Visit Exceptions	Manage and resolve visit exceptions; visits placed <i>On Hold</i> by a Family Member on the Family Portal

# Patient Visit Family Dashboard

The *Family Dashboard* page is comprised of three sections: **Search Filters**, **Schedule Change Requests**, and **Schedule Visit Exceptions**. Use the available search filters (such as *Patient Name*, *Caregiver Name*, or Date range) to locate a specific set of results or click **Search** to generate a general search.

Family Dashboard

## Schedule Change Requests

The *Schedule Change Requests* appear on the top grid displaying details per record to include **Admission ID**, **Patient Name** (link), **Caregiver Code**, **Caregiver Name** (link), **Scheduled Date/Time**, **Requested Date/Time**, and a **Approve** and **Reject** checkboxes.

Clicking either the [Patient Name](#) or [Caregiver Name](#) (link) opens the respective Calendar on a separate page to review if the Requested Date/Time is permissible based on the availability. Once the Schedule Change Requests are managed, click **Save** to finish.

Admission ID	Patient Name	Caregiver Code	Caregiver Name	Scheduled Date	Scheduled Time	Requested Date	Requested Time	Approve	Reject
900020598535399	<a href="#">08052016 Patient</a>	1000	Temp Temp	07/03/2019	10:00 - 11:00	07/05/2019	14:00 - 16:00	<input type="checkbox"/>	<input type="checkbox"/>
900020598535399	<a href="#">08052016 Patient</a>	1651	<a href="#">AB Donald</a>	08/13/2019	10:00 - 23:00	07/18/2019	10:00 - 23:00	<input type="checkbox"/>	<input type="checkbox"/>
900020598535399	<a href="#">08052016 Patient</a>	2271	<a href="#">12</a>	08/30/2019	17:00 - 19:00	08/30/2019	01:00 - 23:50	<input type="checkbox"/>	<input type="checkbox"/>

Family Dashboard: Schedule Change Requests

A [Change Requests History](#) link is available to view a history of Approved or Rejected Schedule Visit Change Requests.

Admission ID	Patient Name	Caregiver Code	Caregiver Name	Scheduled Date	Scheduled Time	Requested Date	Requested Time	Status	Approved By
900020598535399	<a href="#">08052016 Patient</a>	1000	Temp Temp	06/29/2019	14:00 - 15:00	06/26/2019	14:00 - 15:00	Approved	vikas QA (mgm/qa2)
900020598535399	<a href="#">08052016 Patient</a>	2300	112 Production	10/24/2019	10:00 - 11:00	10/25/2019	10:00 - 11:00	Approved	FP Test (FPUser)

Change Request History

## Schedule Visit Exceptions

The bottom grid displays the *Schedule Visit Exceptions* for visits that have been placed *On Hold (Status)* by a family member on the Portal.

Details per record include **Admission ID**, **Patient Name** (link), **Caregiver Code**, **Caregiver Name** (link), **Scheduled Date/Time**, **Reason**, **Status** and a **TS not req** (Timesheet not required) and **Archive** check-boxes.

Admission ID	Patient Name	Caregiver Code	Caregiver Name	Scheduled Date	Scheduled Time	Reason	Status	TS not reqd	Archive
900020598535399	<a href="#">08052016 Patient</a>	1000	Temp Temp	06/04/2019	11:00 - 12:00	Caregiver late	On Hold	<input type="checkbox"/>	<input type="checkbox"/>
900020598535399	<a href="#">08052016 Patient</a>	2269	<a href="#">10 Production</a>	06/19/2019	14:00 - 15:00	Caregiver not present	On Hold	<input type="checkbox"/>	<input type="checkbox"/>
900020598535399	<a href="#">08052016 Patient</a>	2313	<a href="#">125 Production</a>	06/21/2019	02:00 - 03:00	Caregiver left early	On Hold	<input type="checkbox"/>	<input type="checkbox"/>

Family Dashboard: Schedule Visit Exceptions

When a Patient or Patient advocate issues a *Raise Concern* on the Family Portal the visit is automatically set to *On Hold* Status with a Timesheet Required. The status can be changed to *Resolved* once the Timesheet is received by the Agency or the **TS not req** checkbox is selected to clear the exception. Click **Save** to save any changes and/or resolutions made on the page.

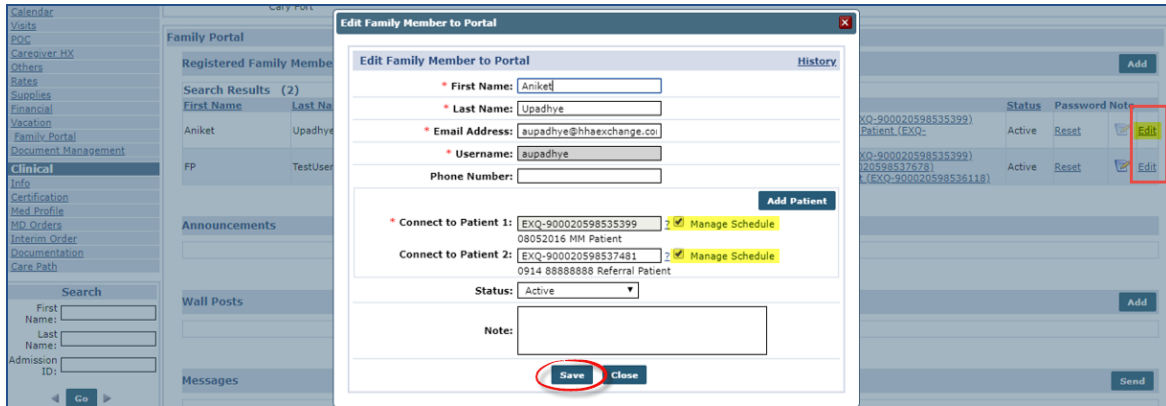
A [Visit Exception History](#) link is available to view a history of visits that have been acted upon or archived.

Admission ID	Patient Name	Caregiver Code	Caregiver Name	Scheduled Date	Scheduled Time	Reason	Status	TS not reqd	Archive
900020598535399	<a href="#">08052016 Patient</a>	2313	<a href="#">125 Production</a>	06/21/2019	02:00 - 03:00	Caregiver left early	Resolved	<input type="checkbox"/>	<input type="checkbox"/>

Visit Exceptions History

# Enabling the Manage Schedule Functionality for Family Members

Select the **Manage Schedule** checkbox per Patient via the HHAX Family Portal page (*Patient > Family Portal*) for family members to be able to manage a Patient’s Schedule. From the *Registered Family Members* section on the page, click the [Edit](#) link to open the *Edit Family Member* window. Select the **Manage Schedule** checkbox for the applicable Patient(s) to enable the family member to issue *Change Requests* and *Raise Concerns* on the Family Portal Schedule page.

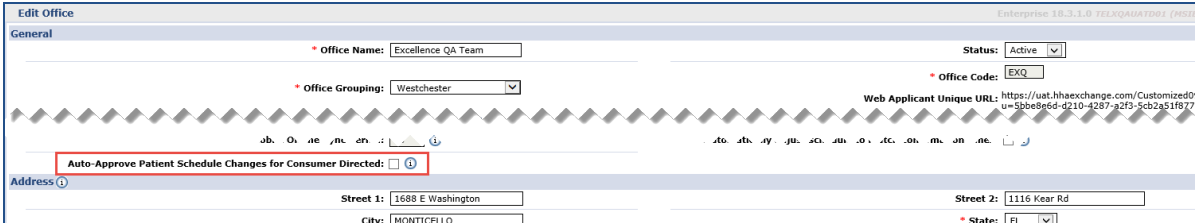


Enabling Manage Schedule

**Note:** This functionality must be enabled for each individual family member.

# Auto-Approve Patient Schedule Changes (Office Settings)

To auto-approve a Patient’s Schedule Changes, navigate to **Admin > Search Office > Edit Office**. In the *Edit Office* page, select the **Auto-Approve Patient Schedule Changes for Consumer Directed** checkbox and save.



## Auto-Approve Patient Schedule Changes

Activating this setting allows the system to immediately confirm/approve any Schedule Request Changes provided there are no conflicts. In addition, the visit must be at least 24 hours in the future and the Care-giver must be available for the requested date and time.

Patients and Patient advocates can view the Change Requests **Status** of on the Family Portal Schedule page. Once a Rescheduled visit is approved, the Visit Type becomes “Scheduled” and is moved to the new date and time. If a rescheduled visit is rejected, then the Visit Type indicated is “Scheduled” and is NOT moved to the new date and time.