



# Family Portal (Portal User) Process Guide

Navigating and Using the Portal

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# Family Portal (Users)

## 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.

HHAX (HHAX) has developed the **Family Portal** to allow Homecare Agencies to better communicate with the families of Patients, as well as to be able to view visit information from/to family members.

Once registered by an Agency, family members and advocates can access the **Family Portal** where the group can post messages concerning the Patient’s care and condition as well as send messages through the **Family Portal** directly to the Agency. In addition, family members and advocates can request schedule changes and raise concerns for passed visits. This category covers how family members and advocates access, navigate, and manage in the Family Portal.

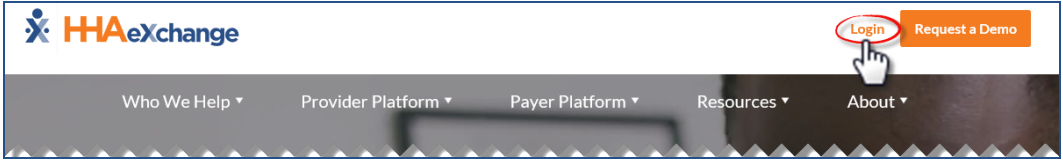
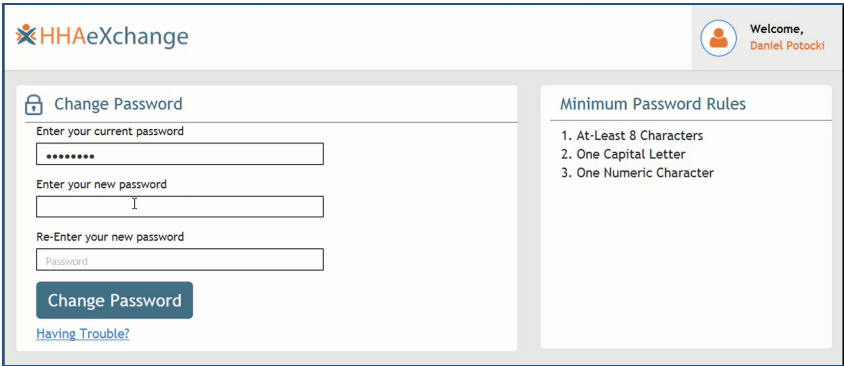
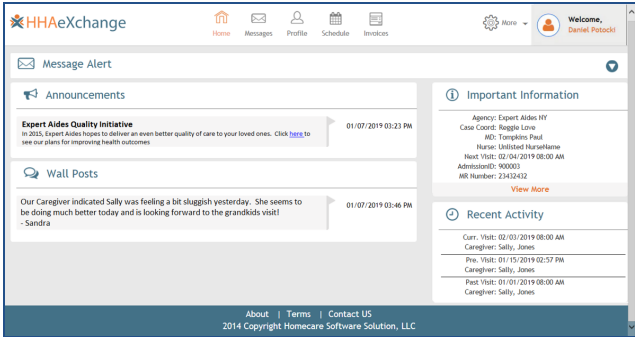
## HHAX System Key Terms and Definitions

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

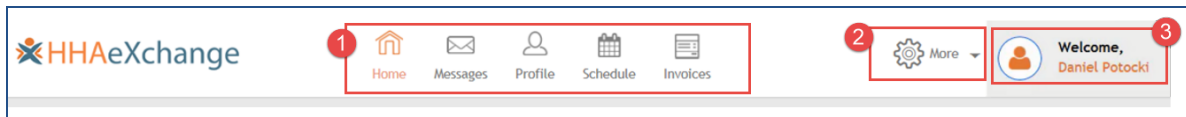
# Family Portal Registration

Upon registration, family members and advocates receive a confirmation email with instructions on accessing the Family Portal. Follow the steps below to log into the Portal.

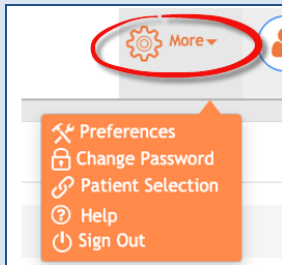
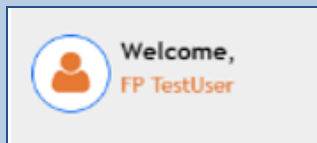
Step	Action
1	<p>Click on the HHAExchange link provided in the email (<a href="https://hhaexchange.com/">https://hhaexchange.com/</a>) and click on <b>Login</b>.</p> 
3	<p>Enter the <b>Username</b> and the system-generated <b>Password</b>, as noted in the email.</p> <p>Create a <u>new</u> <b>Password</b> as prompted by the system. Refer to the Password Rules for requirements.</p>  <p style="text-align: center;"><b>Create a New Password</b></p>
4	<p>The system routes to the Family Portal <b>Home</b> page.</p>  <p style="text-align: center;"><b>Family Portal Homepage</b></p>

# Navigating the Family Portal

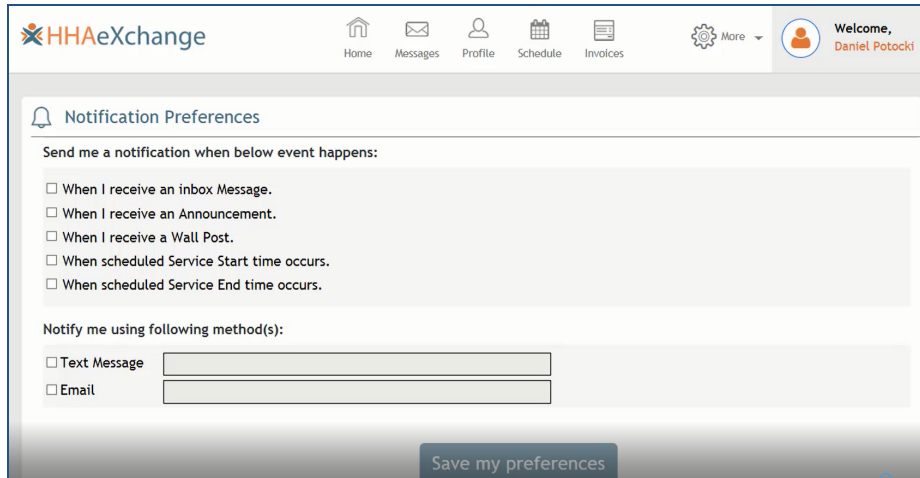
The top panel houses various components that are static throughout the application, as follows: (1) Family Portal Pages (functions), (2) the More configuration menu, and (3) the indication of the logged in user; as illustrated below. Each Portal page is covered in the following sections.



Family Portal Top Panel

Section		Description	
1	Pages	Family Portal pages with particular functionality to include <b>Home, Messages, Patient Profile, Schedule, and Invoices.</b>	
2	More	Click on <b>More</b> (gear cog icon) to access Portal Settings, as described in the table below.	
			
		Click	To...
		Preferences	Set up Alert preferences on how to be notified when various actions take place (via Family Portal, text message, or email). See image in <a href="#">Preferences</a> .
		Change Password	Change the Password. <b>Note:</b> <i>Neither HHAX, nor System Users, are able to retrieve a family member's password.</i>
		Patient Selection	Navigate between various Family Profiles if the family member is associated with multiple Patients. See image in <a href="#">Patient Selection</a> .
		Help	To access instructional documents on how to use the Portal.
Sign Out	Log out of the HHAX Family Portal		
3	User	Indicates the logged in user.	
			

## Preferences

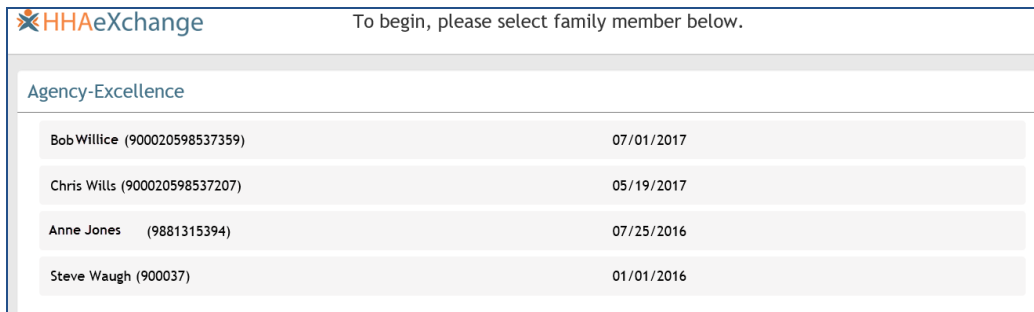


The screenshot shows the 'Notification Preferences' page in the HHAExchange system. The page header includes the HHAExchange logo and navigation icons for Home, Messages, Profile, Schedule, and Invoices. A 'More' dropdown menu is also present. The user is identified as Daniel Potocki. The main content area is titled 'Notification Preferences' and contains two sections: 'Send me a notification when below event happens:' and 'Notify me using following method(s):'. The first section has five checkboxes for different notification events, all of which are currently unchecked. The second section has two checkboxes for notification methods: 'Text Message' and 'Email', both also unchecked. Below these sections is a 'Save my preferences' button.

**Family Portal: (Notification) Preferences**

## Patient Selection

If the family member is associated with other Patients in the system, the *Patient Selection* page opens for the user to select the applicable Patient.



The screenshot shows the 'Patient Selection' page in the HHAExchange system. The page header includes the HHAExchange logo and the text 'To begin, please select family member below.' The main content area is titled 'Agency-Excellence' and contains a table listing four family members with their names, phone numbers, and associated dates.

Agency-Excellence	
Bob Willice (900020598537359)	07/01/2017
Chris Wills (900020598537207)	05/19/2017
Anne Jones (9881315394)	07/25/2016
Steve Waugh (900037)	01/01/2016

**Family Portal: Patient Selection**

# Home

The *Home* page provides various sections where family members can view **Message Alerts**, **Announcements**, and **Wall Posts** transmitted by an Agency. On the right side of the screen, the section **Important Information** provides service particulars (such as *Agency*, *Coordinator*, *MD* and *Nurse Names* as well as the Patient's *Admission ID* and *Next Visit* details). The **Recent Activity** section displays a list of recent visits by date, time, and Caregiver.

The screenshot shows the HHAeXchange Family Portal Home Page. At the top, there is a navigation bar with the HHAeXchange logo on the left and a user profile on the right that says "Welcome, Daniel Potocki". The navigation bar includes icons for Home, Messages, Profile, Schedule, and Invoices. Below the navigation bar, the page is divided into several sections:

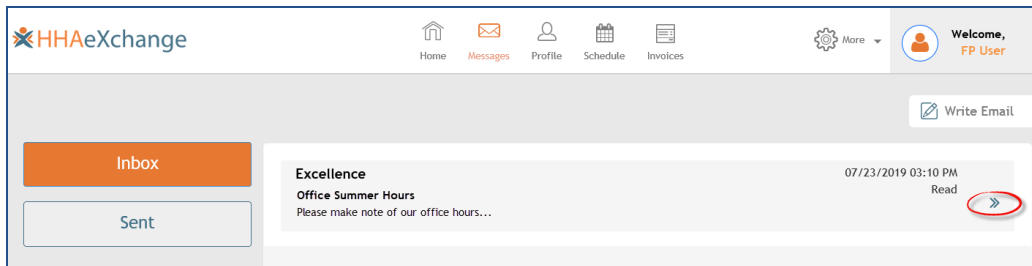
- Message Alert:** A section with a message icon and a dropdown arrow.
- Announcements:** A section with a megaphone icon. It contains a message titled "Expert Aides Quality Initiative" dated 01/07/2019 03:23 PM. The message text reads: "In 2015, Expert Aides hopes to deliver an even better quality of care to your loved ones. Click [here](#) to see our plans for improving health outcomes".
- Wall Posts:** A section with a speech bubble icon. It contains a post titled "Our Caregiver indicated Sally was feeling a bit sluggish yesterday. She seems to be doing much better today and is looking forward to the grandkids visit!" dated 01/07/2019 03:46 PM, attributed to "- Sandra".
- Important Information:** A section with an information icon. It lists service particulars: Agency: Expert Aides NY, Case Coord: Reggie Love, MD: Tompkins Paul, Nurse: Unlisted NurseName, Next Visit: 02/04/2019 08:00 AM, AdmissionID: 900003, and MR Number: 23432432. There is a "View More" link below the list.
- Recent Activity:** A section with a clock icon. It lists recent visits: Curr. Visit: 02/03/2019 08:00 AM, Caregiver: Sally, Jones; Pre. Visit: 01/15/2019 02:57 PM, Caregiver: Sally, Jones; and Past Visit: 01/01/2019 08:00 AM, Caregiver: Sally, Jones.

At the bottom of the page, there is a footer with links for "About", "Terms", and "Contact US", and a copyright notice: "2014 Copyright Homecare Software Solution, LLC".

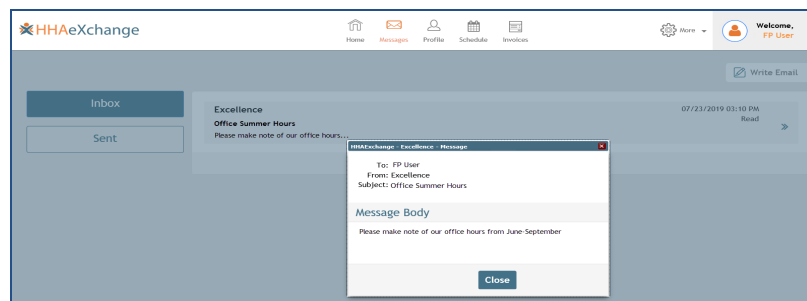
Family Portal: Home Page

# Messages

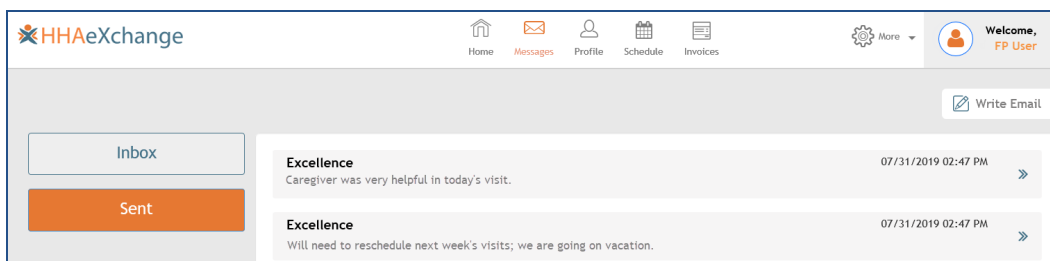
The *Message* page is where a family member views messages sent by an Agency as well as write or respond to messages. The page opens with **Inbox** selected as default. To read a message, click on the double-arrow to read the entire message (as illustrated in the images below).



Family Portal: Messages Page

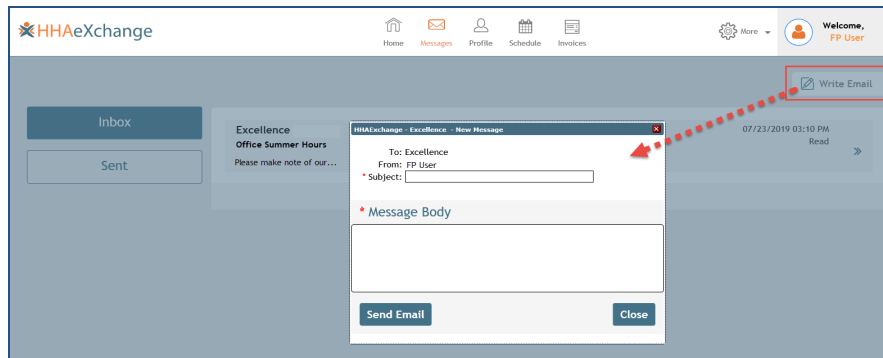


Click on the **Sent** button to view messages sent to an Agency.



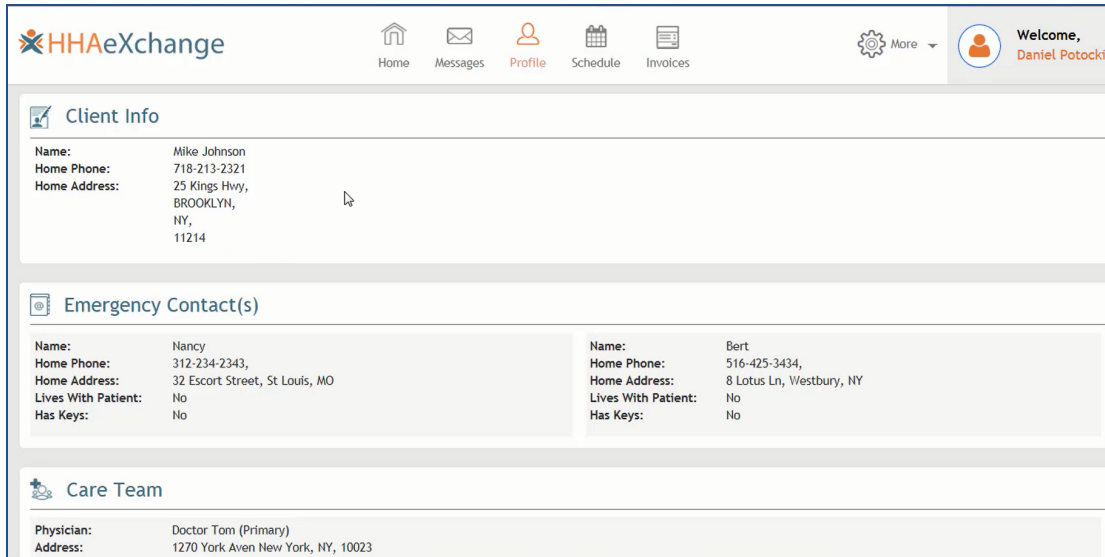
To send a message, click on the **Write Message** icon (located at the top-right of the screen). Complete required fields (denoted with red asterisk). Click the **Send Email** button to send.





# Profile

The *Profile* page displays read-only information about the Patient including the Patient’s Address (under the **Client Info** section), **Emergency Contacts**, and **Care Team**.



The screenshot shows the 'Profile' page in the HHAexchange Family Portal. At the top, there is a navigation bar with icons for Home, Messages, Profile (highlighted), Schedule, and Invoices. A 'More' settings icon is also present. On the right, a user greeting says 'Welcome, Daniel Potocki' next to a profile icon.

The main content area is divided into three sections:

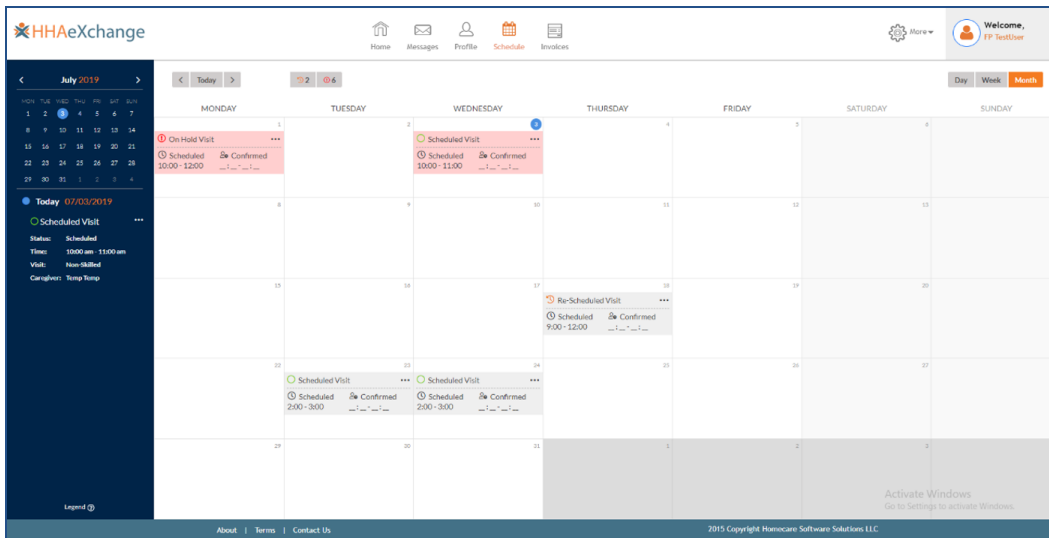
- Client Info:** Displays patient details for Mike Johnson, including Home Phone (718-213-2321) and Home Address (25 Kings Hwy, Brooklyn, NY, 11214).
- Emergency Contact(s):** Lists two emergency contacts: Nancy (312-234-2343, 32 Escort Street, St Louis, MO) and Bert (516-425-3434, 8 Lotus Ln, Westbury, NY). Both indicate they do not live with the patient and do not have keys.
- Care Team:** Lists the primary physician, Doctor Tom, with the address 1270 York Aven New York, NY, 10023.

**Family Portal: Profile Page**

# Schedule

The *Schedule* page on the Family Portal has been redesigned for Patients and Patient advocates (such as family members), facilitating a calendar view of the Patient’s Visit Schedule (as illustrated in the image below). By default, the Schedule opens to a Monthly view (of the current month).

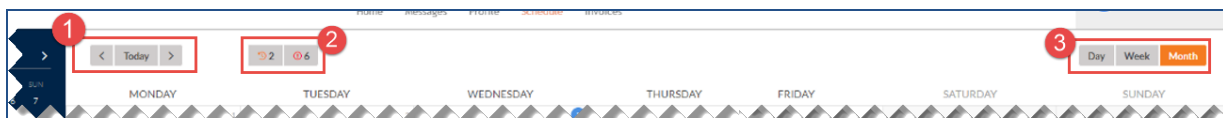
From here, Patient and Patient advocates can manage the Patient’s Schedule by requesting schedule changes for Scheduled visits and raising concerns for Completed visits before they are billed.



Family Portal: Schedule Page

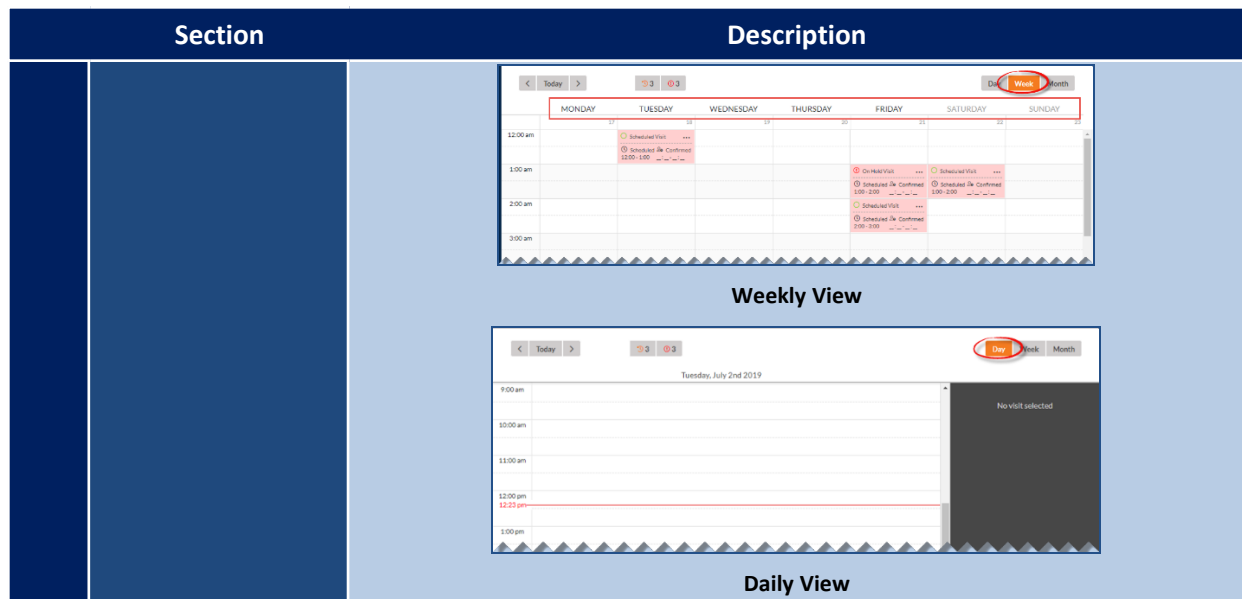
## Navigating the Family Portal Schedule Page

This section covers the various sections within the Schedule page.



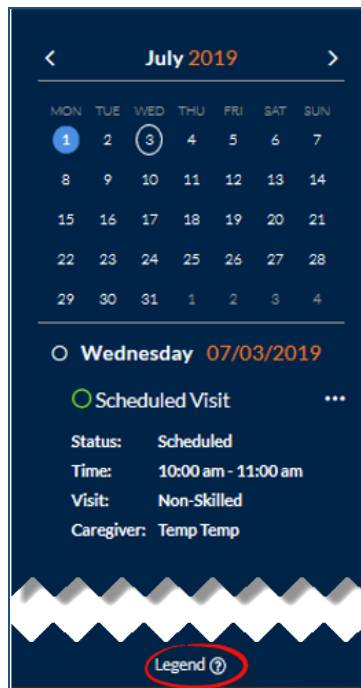
Schedule Page Sections

Section	Description
1	<b>Daily Navigation</b> Click arrows to access prior or following days from the current day.
2	<b>Notifications</b> The icons above the calendar indicate the number of <b>Change Requests</b> and <b>Raised Concerns</b> . The counts are the Visit Change Requests in the <i>Waiting</i> state and the <i>Pending (Raised)</i> Raised Concerns for the visits.
3	<b>Calendar View</b> Click on the preferred calendar view ( <i>Day, Week, or Month</i> ). The page opens to the Monthly view by default.



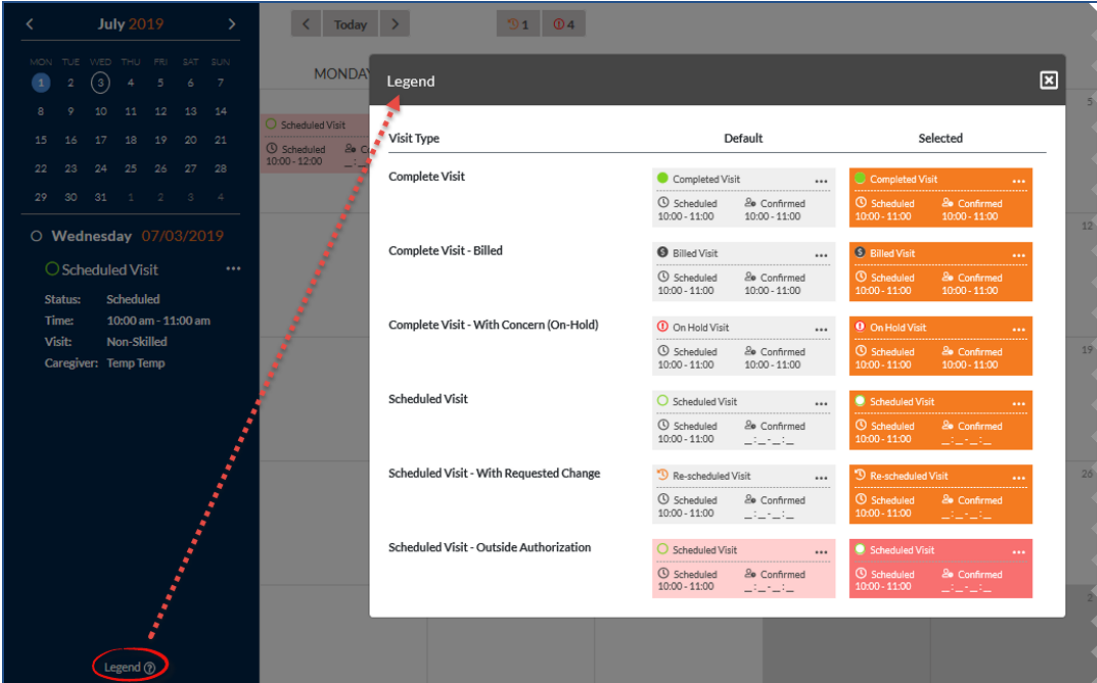
The left panel provides a mini monthly calendar with the current day's activity (as seen on the following image). As with the main calendar, clicking on other dates routes the user to view Scheduled Visit details for the selected date and manage accordingly. The schedule refreshes as the user navigates in the mini-monthly calendar.

Click on the **Legend** (link at the bottom) to open the *Legend* window.



Left Panel

The *Legend* window defines what the various colors mean on the calendar (as seen in the image below).



Visit Type	Default	Selected
Complete Visit	<ul style="list-style-type: none"> <li>Completed Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed 10:00 - 11:00</li> </ul>	<ul style="list-style-type: none"> <li>Completed Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed 10:00 - 11:00</li> </ul>
Complete Visit - Billed	<ul style="list-style-type: none"> <li>Billed Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed 10:00 - 11:00</li> </ul>	<ul style="list-style-type: none"> <li>Billed Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed 10:00 - 11:00</li> </ul>
Complete Visit - With Concern (On-Hold)	<ul style="list-style-type: none"> <li>On Hold Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed 10:00 - 11:00</li> </ul>	<ul style="list-style-type: none"> <li>On Hold Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed 10:00 - 11:00</li> </ul>
Scheduled Visit	<ul style="list-style-type: none"> <li>Scheduled Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed</li> </ul>
Scheduled Visit - With Requested Change	<ul style="list-style-type: none"> <li>Re-scheduled Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed</li> </ul>	<ul style="list-style-type: none"> <li>Re-scheduled Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed</li> </ul>
Scheduled Visit - Outside Authorization	<ul style="list-style-type: none"> <li>Scheduled Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled Visit</li> <li>Scheduled 10:00 - 11:00</li> <li>Confirmed</li> </ul>

**Schedule Legend**

# Functionality within the Family Portal Schedule Page

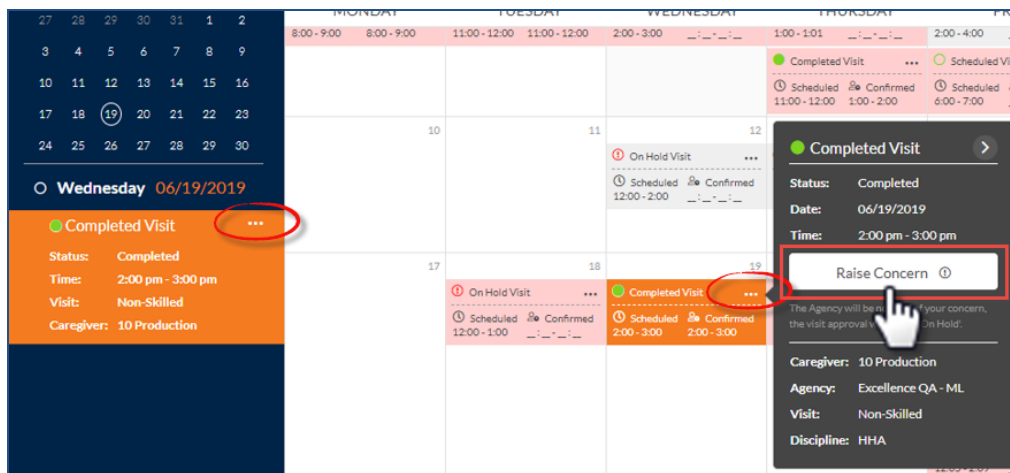
**Tip:** You can press **Ctrl-F** on your keyboard to search this topic.

This section covers the various functions within the Family Portal Schedule page to include Raising Concerns, Change Requests, and viewing Visit POC Details.

## Raising a Concern for a Completed Visit

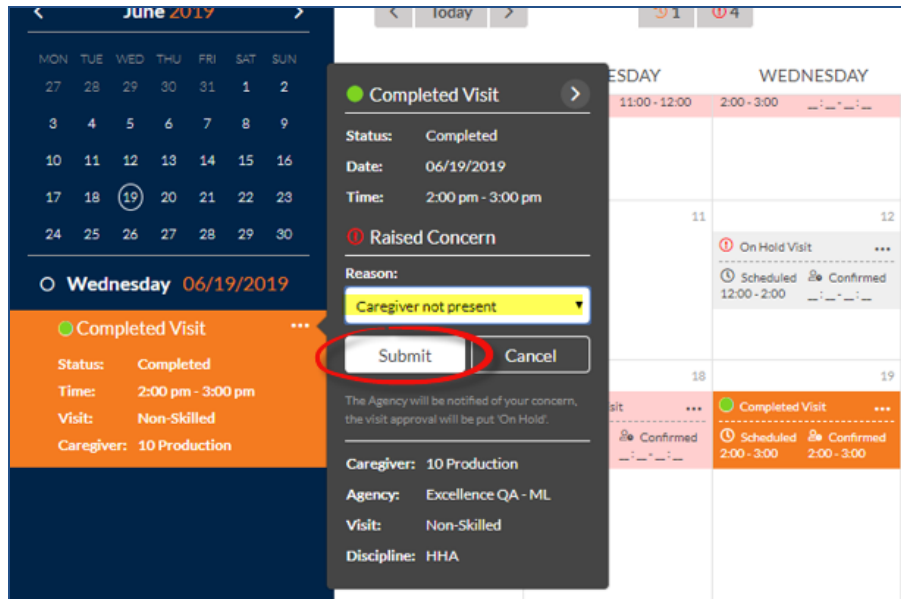
Patients and Patient advocates can provide feedback or Raise a Concern for a Completed Visit that has not been billed or has passed the Schedule date without confirmation. Click on the ellipsis (...) on the applicable date from either the main pane or from the left panel to open the *Completed Visit* window (as seen in the image below). Click on the **Raise Concern** button to continue.

**Note:** Functionality is the same for either chosen mode.



Raise Concern Functionality

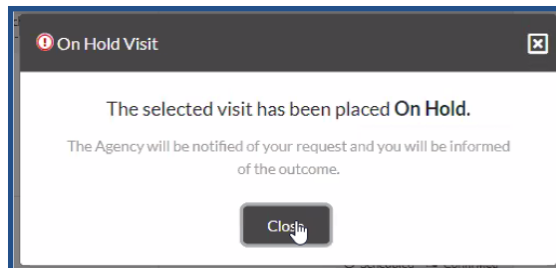
From the **Reason** dropdown field, select the applicable reason for the concern (*Caregiver not present*, *Caregiver late*, or *Caregiver left early*). Click **Submit** to raise a concern on the schedule.



**Submit Raised Concern**

Upon submitting a Raised Concern, the system issues an alert notifying that the visit is placed **On Hold**, until resolution is determined.

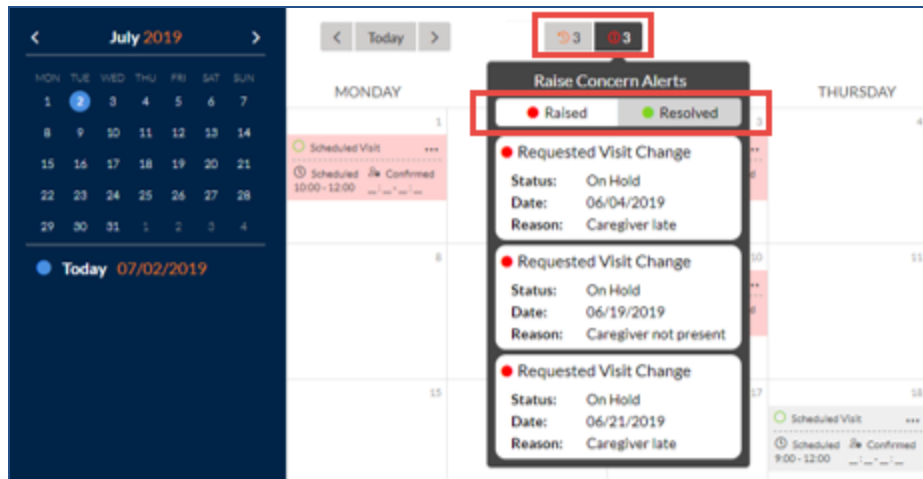
**Note:** Refer to the **Raised Concern (List View)** section below to view the Status of the request.



Once a **Raise Concern** is submitted, a user can apply edits or remove the concern from the Schedule.

### **Raised Concern (List View)**

To view all Raised Concerns and status per record, click the **Raised Concern** icon (at the top of the calendar), as seen in the following image. Refer to the provided Legend to determine the Status (*Raised* and *Resolved*). This icon displays the Raised Concerns entered for the past 30 days (from the current date).



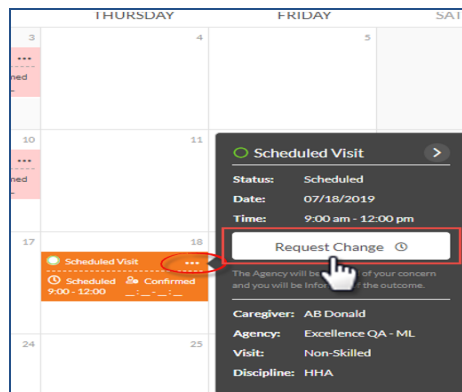
Raised Concern (List View)

## Scheduled Visit Change Request

Patients and Patient advocates can request to change the date and time of a Patient's visit as needed by making a **Scheduled Visit Change Request**. A Change Request can be applied to future visits only. This feature becomes unavailable for visits less than 24 hours from the current date and time.

Click on the ellipsis (...) on the applicable date from either the main pane or from the left panel to open the *Scheduled Visit* window (as seen in the image to the right).

Click on the **Request Change** button to continue.

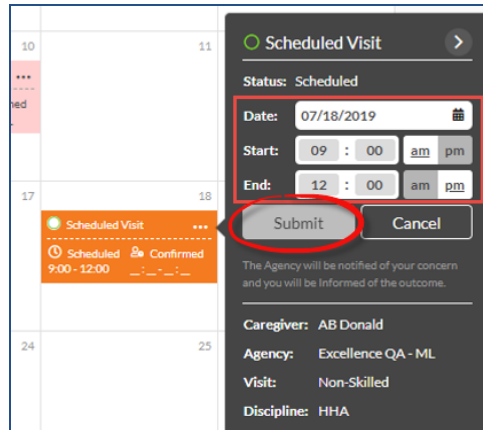


Request Change for a Scheduled Visit

The **Date**, **Start**, and **End** fields populate to specify the changes.

Once the proposed changes are entered, click the **Submit** button to request the change.

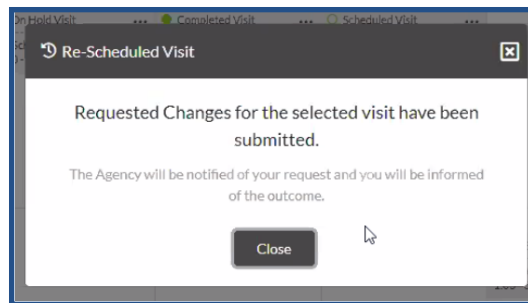




**Request Change for a Scheduled Visit**

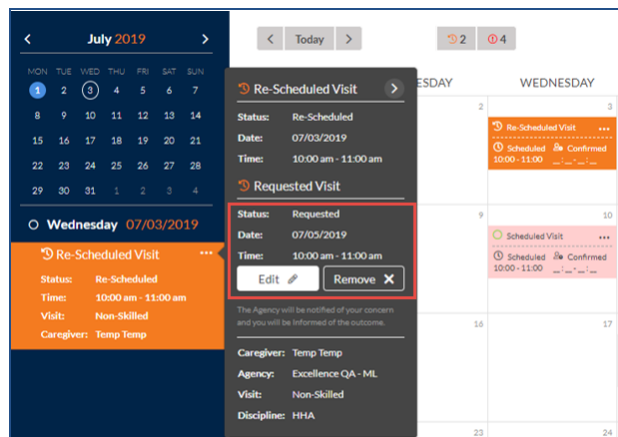
An alert informs the user that their request has been submitted. The Agency then approves or rejects the Request Change (as seen in the image to the right).

**Note:** Refer to the **Request Change** icon to view the Status of the request.



**Request Change Submitted**

Once a Request Change is submitted, a user can apply edits or remove the change from the Schedule.

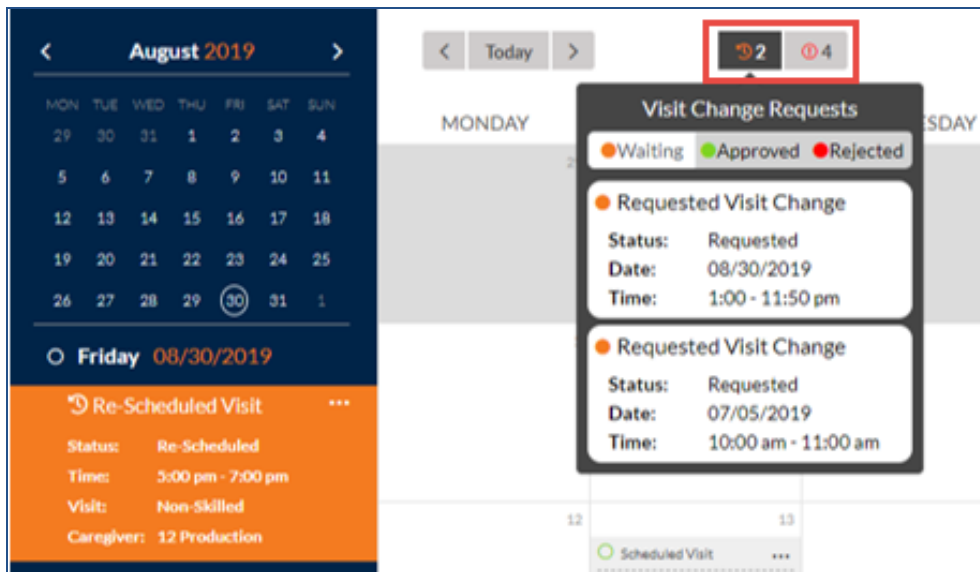


**Visit Rescheduled**

## Change Request (List View)



To view all requested changes and status, click the **Scheduled Visit Change Request** icon (at the top of the calendar), as seen in the following image. Refer to the Legend to determine the **Status** (*Waiting*, *Approved*, or *Rejected*). This icon displays the Change Requests in *Waiting* state entered for the past 30 days (from the current date). Clicking on a visit (from the list) displays it on the left navigation panel.

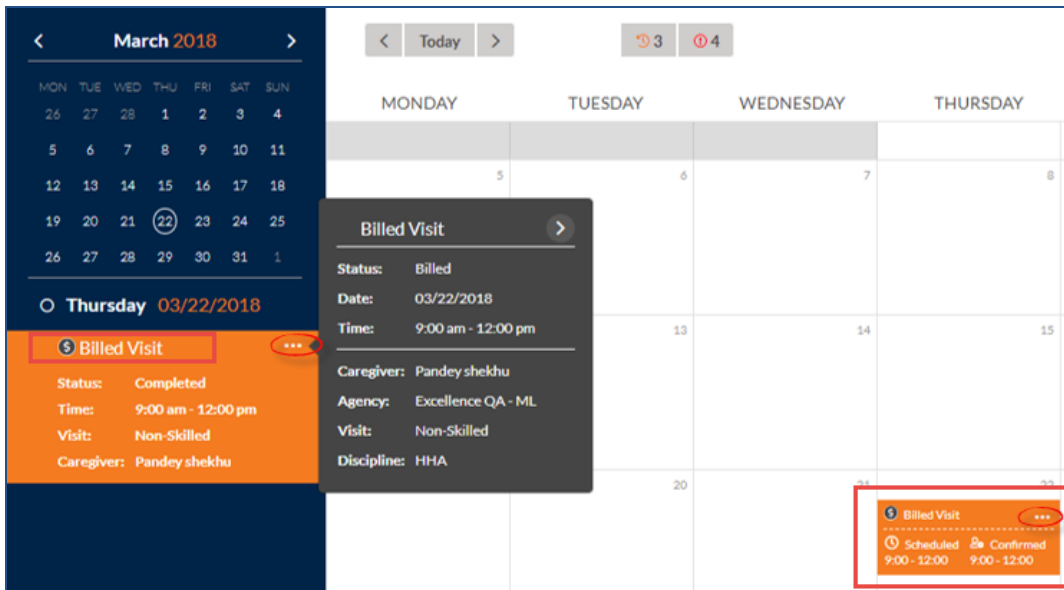


Change Requests (List View)

Patients and Patient advocates can view the Change Requests **Status** on the Family Portal Schedule page. Once a Rescheduled visit is approved, the **Visit Type** becomes “Scheduled” and the visit is moved to the requested date and time. If a Rescheduled visit is rejected, then the **Visit Type** indicated “Scheduled” with no updates.

## Scheduled with Billed Status

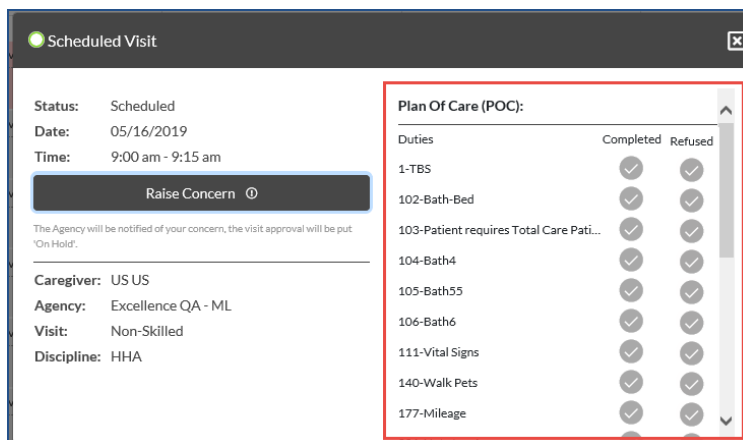
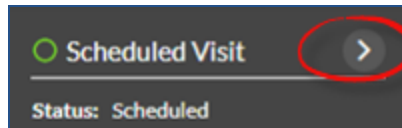
**Billed Visits** appear in dark gray on the calendar; turning orange when selected. A black \$ (dollar) sign icon appears in the title (indicating *Billed*). To see details on a Billed Visit, click on the ellipsis (...) on either the date cell or left navigation panel. The Billed Visits pop-up window appears providing visit details. Once Billed, no further action can be taken with the visit.



Billed Visit

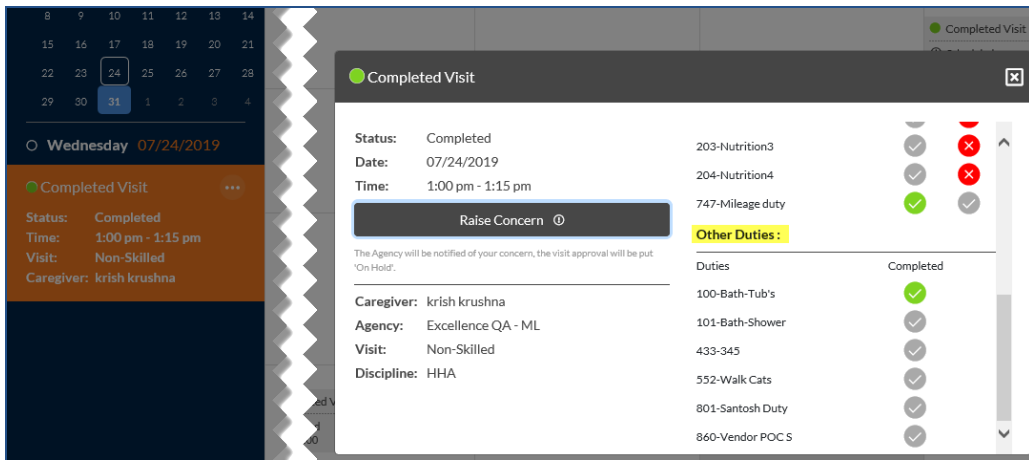
## Visit POC Details

To view a visit's Plan of Care (POC) details, click on the arrow on the visit detail pop-up (title) to expand the window (as illustrated in the image below). Where applicable the **Raise Concern** and **Request Change** buttons appear in the expanded pop-up.



Scheduled Visit: POC

Use the scroll bar on the right to view **Other Duties** aside from the required Duties. Completed Visits show the completed Duties and Other Duties, as illustrated in the following image.



**Completed Visit**

Status: Completed  
 Date: 07/24/2019  
 Time: 1:00 pm - 1:15 pm

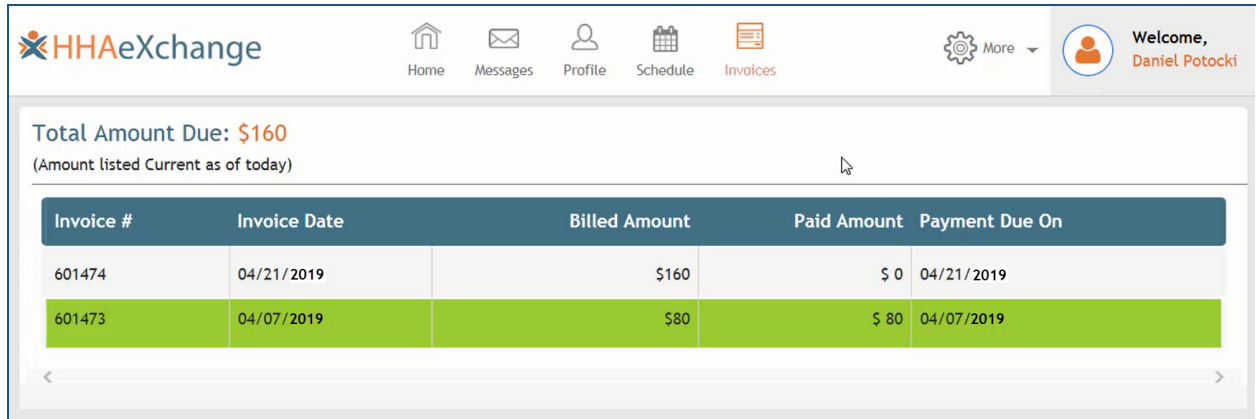
**Other Duties :**

Duties	Completed
100-Bath-Tub's	✓
101-Bath-Shower	✓
433-345	✓
552-Walk Cats	✓
801-Santosh Duty	✓
860-Vendor POC S	✓

### Other Duties

# Invoices

The *Invoices* page lists all Invoices for the Patient's Billed Visits.



The screenshot shows the HHAeXchange interface. At the top left is the HHAeXchange logo. The navigation bar includes icons for Home, Messages, Profile, Schedule, and Invoices. On the right, there is a 'More' gear icon and a user profile for Daniel Potocki. Below the navigation bar, a summary box displays 'Total Amount Due: \$160' with a note '(Amount listed Current as of today)'. A table below lists two invoices:

Invoice #	Invoice Date	Billed Amount	Paid Amount	Payment Due On
601474	04/21/2019	\$160	\$ 0	04/21/2019
601473	04/07/2019	\$80	\$ 80	04/07/2019

Family Portal: Invoices Page