



Linking with a Payer

A 'How To' Guide for Enterprise Users

Contents

Linking with a Payer	1
Overview	1
HHAX System Key Terms and Definitions	1
Process: Linking with a Payer	2
Internal vs Linked Contract Member	3
Step 1: Discharging an Internal Contract	4
Step 2: Contracts	5
Mutual/Linked Patients	7
Updates to Patient Demographics	8
Rates	11
Single Patient Shell	12
Patient Search	12
Other Placements	12
Provider Multiple Office (Assigning Patients)	15

Linking with a Payer

Overview

This guide is targeted for HHAExchange (HHAX) Enterprise Providers who are linking to HHAX Professional system Payer Clients (“the Payer”).

Linking refers to replacing existing Internal Clients with Linked Patient records. When linking with a Payer, the workflow differs from Internal Contracts within the Enterprise System. The process also covers the workflow of Mutual Patients and updating Member Demographics. This guide provides instructions and best practices on how to link to a new Payer.

The following steps must be considered regarding linking:

- Must occur before the agreed upon linking date,
- Followed only for the Payer to be linked,
- Coordination between HHAX and the Payer.

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

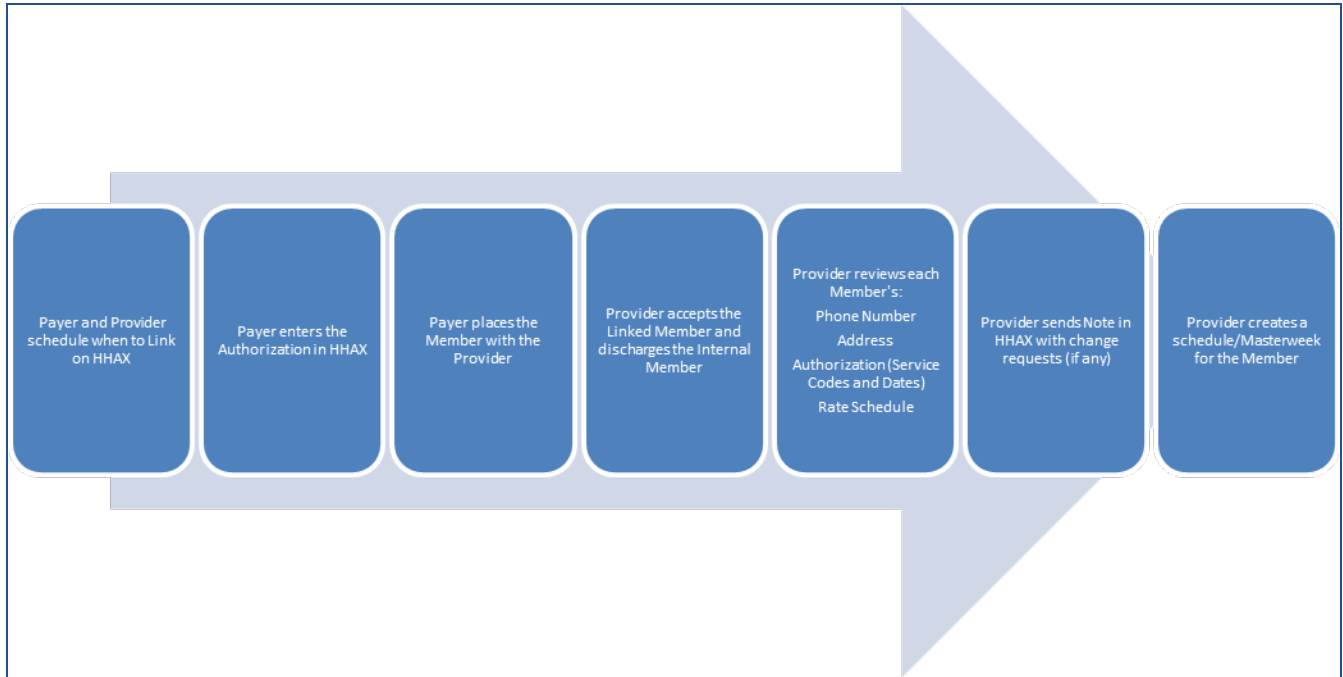
HHAX System Key Terms and Definitions

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

Process: Linking with a Payer

HHAX coordinates with the Payer and the Provider to establish a timeframe for the following steps.



Internal vs Linked Contract Member


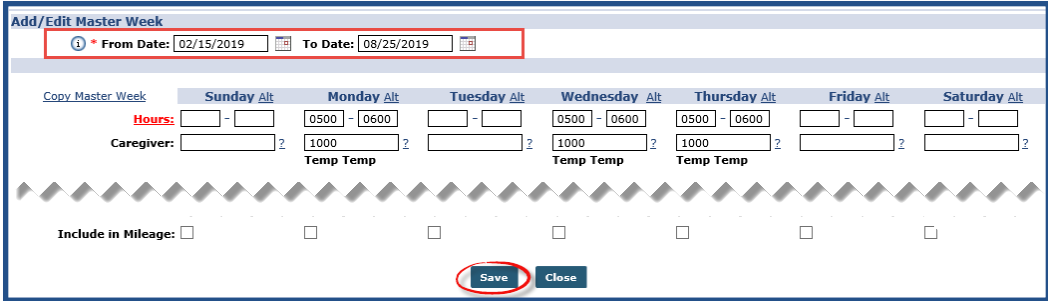
Internal Patients are assigned to Internal Contracts. Internal Patients become Linked Contract Patients when assigned/linked to a Payer. When an Internal Patient becomes a Linked Contract Patient, Providers see two entries for the Payer in the **Contract** filter throughout the application. In addition, there are two Contracts for each Patient (an Internal and a new Linked Contract). In some cases, both Contracts remain active in the system. In such cases, the Patient must be discharged from the applicable Internal Contract (covered in the following section).

For example, a Patient receives both *Skilled* and *Non-Skilled* services; but the Payer is only linking the *Non-Skilled* services. Therefore, the Patient has two active Contracts with the Agency; the linked *Non-Skilled* services and the Internal Contract for *Skilled* services.

For further information on managing multiple Patient profiles, refer to the [Single Patient Shell](#) section.

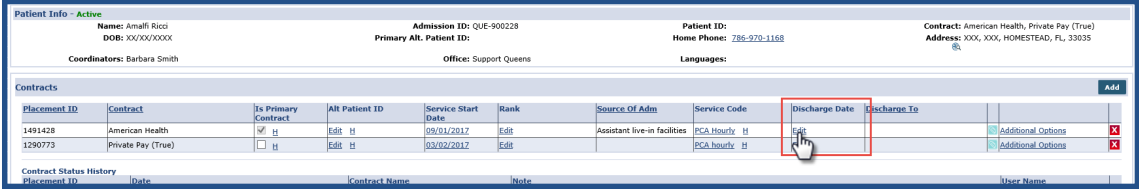
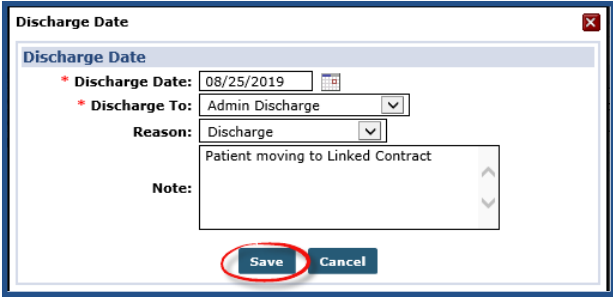
Step 1: Discharging an Internal Contract

Follow the steps below to **Discharge** the Internal Contract from the Member record.

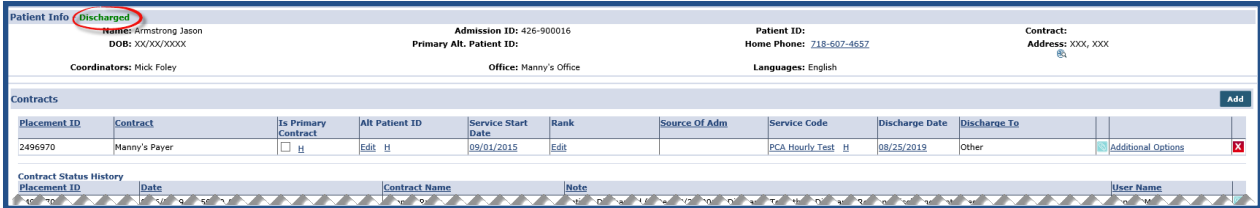
Step	Action
1	<p>Search for the Internal Contract for the Patient. Click Master Week (on the left navigation panel) to access the Patient’s Master Week. On the Master Week page, click on the Edit icon (on the right-most corner of the <i>Master Week</i> section).</p> 
2	<p>Update the To Date field to the date before the linking is scheduled to begin. For example, if the linking date is <u>08/26/2019</u>, then update the To Date field to <u>08/25/2019</u>.</p> 
3	<p>Click Save.</p>

Step 2: Contracts

Follow the steps below to Discharge the Patient from a Contract.

Step	Action
1	In the Patient Profile, go to the Contracts page (on the left navigation panel).
2	<p>Locate the Contract that the Provider is linking and select the Edit (link) under the Discharge column.</p> 
3	<p>The <i>Discharge Date</i> window opens. Select the applicable date in the Discharge To field. In the Notes field, add a comment to explain the discharge; for example: “The Contract is now a Linked Contract.”</p> 
4	Click Save .

If the Patient only has a single Contract, receiving only *Non-Skilled* authorizations, and the **Discharge Date** is entered, then the **Status** changes to Discharged (on midnight, the day of). As a result, the Linked Contract Patient is the Active record.



Placement ID	Contract	Is Primary Contract	Alt Patient ID	Service Start Date	Rank	Source Of Adm	Service Code	Discharge Date	Discharge To	Additional Options
2496970	Manny's Payer	<input type="checkbox"/> H	Edit H	09/01/2015	Edit		PCA Hourly Test H	08/25/2019	Other	<input type="checkbox"/> Additional Options <input checked="" type="checkbox"/>

Discharged Status

If the Patient has more than one Contract (Payer) and the Provider is only linking with one, or the Payer is only sending *Non-Skilled* authorizations (via the linking), then the Patient **Status** remains Active (for the other Contracts).



Patient Info Active										
Name: Amalfi Ricci DOB: XX/XX/XXXX			Admission ID: QUE-900228 Primary Alt. Patient ID:			Patient ID: Home Phone: 786-970-1168			Contract: Private Pay (True) Address: XXX, XXX, HOMESTEAD, FL, 33035	
Coordinators: Barbara Smith			Office: Support Queens			Languages:				
Contracts Add										
Placement ID	Contract	Is Primary Contract	Alt Patient ID	Service Start Date	Rank	Source Of Adm	Service Code	Discharge Date	Discharge To	
1491428	American Health	<input type="checkbox"/> H	Edit H	09/01/2017	Edit	Assistant live-in facilities	PCA Hourly H	08/25/2019	Admin Discharge	Additional Options X
1290773	Private Pay (True)	<input checked="" type="checkbox"/> H	Edit H	03/02/2017	Edit		PCA hourly H	Edit		Additional Options X
Contract Status History										
Placement ID	Date	Contract Name	Note	User Name						
1491428	8/26/2019 10:45:26 AM	American Health	Patient Discharged (Date: 08/25/2019, Discharge To: Admin Discharge, Discharge Reason: Discharge, Note: Patient moving to linked contract)	SupportMO						
1491428	10/10/2017 12:21:55 PM	American Health	Service Start Date Updated (Date: 09/01/2017)	Ariel						
1491428	10/10/2017 12:17:20 PM	American Health	Contract Added(09/02/2017)	Ariel						
1290773	3/3/2017 4:45:16 PM	Private Pay (True)	Contract Added(03/02/2017)	Ariel						

Active Status

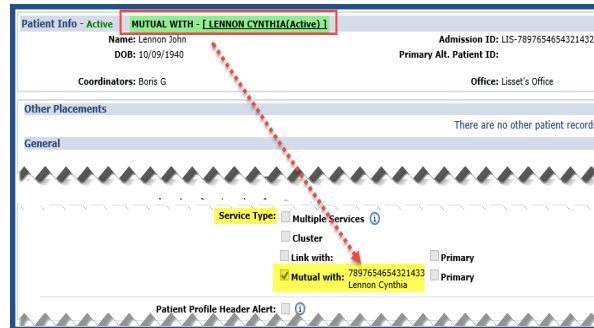
Mutual/Linked Patients

Mutual Patients are cases where 2 Patients (such as a husband and wife) are scheduled at the same time and serviced simultaneously by the same Caregiver.

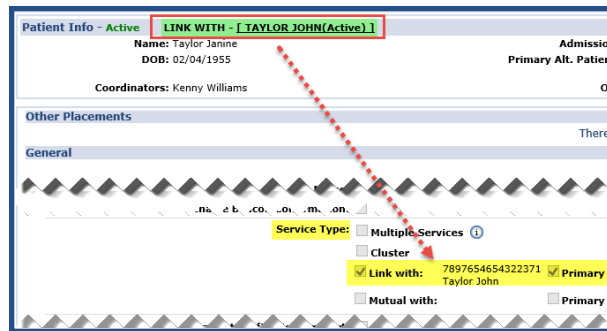
Linked Patients are cases where 2 Patients are scheduled back-to-back by the same Caregiver. For example, Patient 1 is scheduled from 8am-12pm and Patient 2 is scheduled from 12pm-4pm.

When servicing Mutual/Linked Patients, the Caregiver only needs to call in (Clock IN) at the beginning of the first shift and at the end (Clock OUT) of the second shift.

The following images display examples of Mutual and Linked Patients in the system.



Mutual Patients



Linked Patients

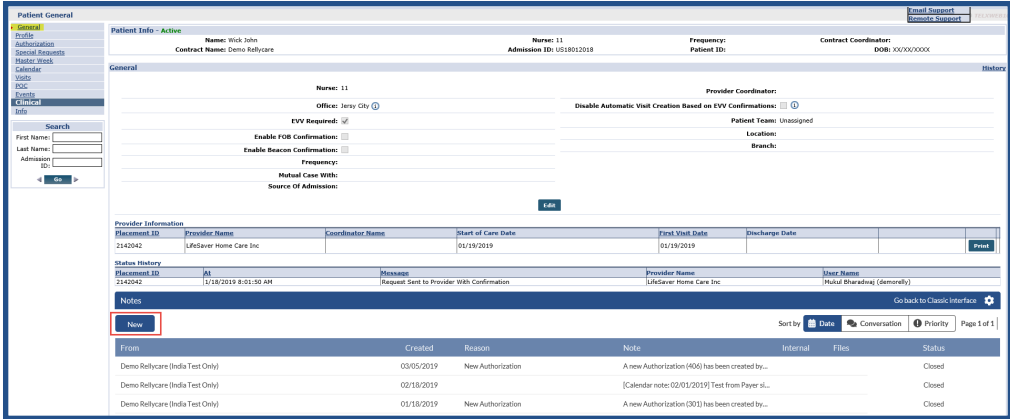
Note: For Linked Contracts, Mutual and Linked Members are controlled by the Payers.

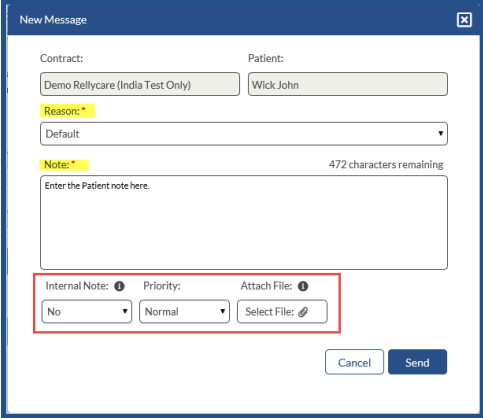
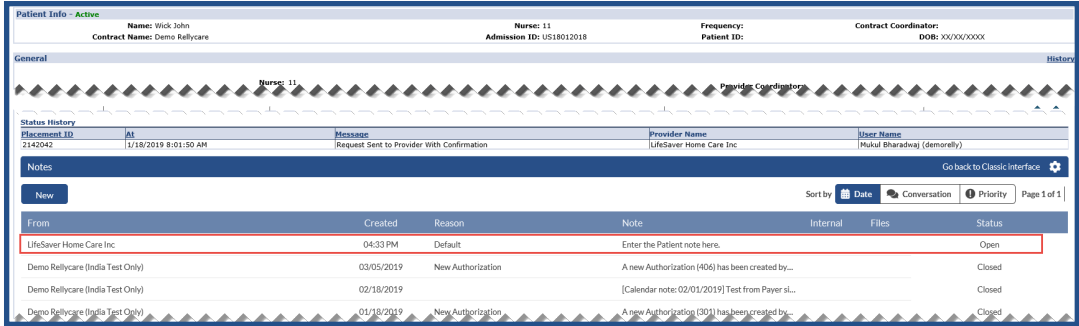
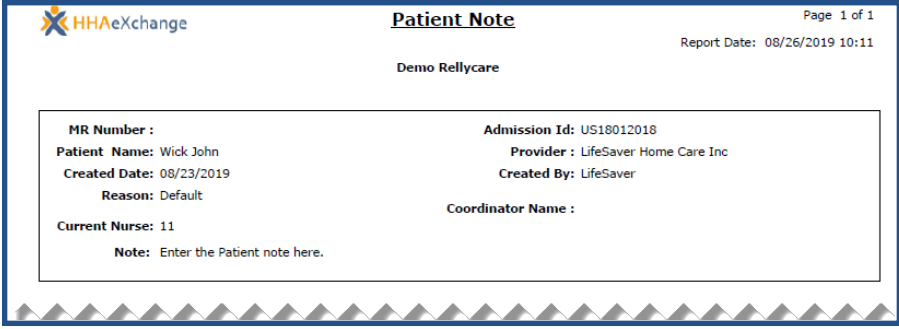
Updates to Patient Demographics

For Linked Contracts, Patient Demographics is controlled by the Payer. Unless a Payer grants a Provider permission to edit, Payers may require the Agency to contact them to update Patient demographic information (such as **Address** or **Phone Number**). This is done by way of Patient Notes (**Communications Module**) in the HHAX system.

The **Patient Notes** functionality allows Payers and Providers to easily communicate regarding a specific Patient and any aspects of the Patient’s care. Complete the steps outlined below to enter, respond, and review Patient Notes.

Complete the following steps to create a Patient Note.

Step	Action
1	Search for the applicable Patient (Patient > Patient Search).
2	Select General from the index (left navigation panel).
3	<p>Scroll to the Notes section (at the bottom of the page). Previous Notes are displayed in the grid of the section. Click the New button to create a message.</p>  <p style="text-align: center;">Create a New Note</p>
4	<p>In the New Message window opens. The Contract and Patient fields are auto-populated. Complete the fields as needed; those with red asterisks are required.</p> <p>Select a Reason for the Note. Reason values are set up and managed by the Payer. On the Note field, enter the actual note to communicate.</p>

Step	Action
	 <p style="text-align: center;">New Message Window</p>
5	<p>Complete the remaining fields, as applicable. Select Yes/No under the Internal Note field. Select Normal/High under Priority and attach supporting documentation under the Attach File field. Click Send to finalize.</p>
6	<p>Once sent, the Note appears under the Patient Notes in the Patient Info page, as seen in the following image.</p>  <p style="text-align: center;">Patient Note</p>
7	<p>To export the Note from HHAX, click the Print button (hover over the Status column to retrieve). The Note is exported as a PDF (as illustrated in the image).</p>  <p style="text-align: center;">Print Note Format</p>



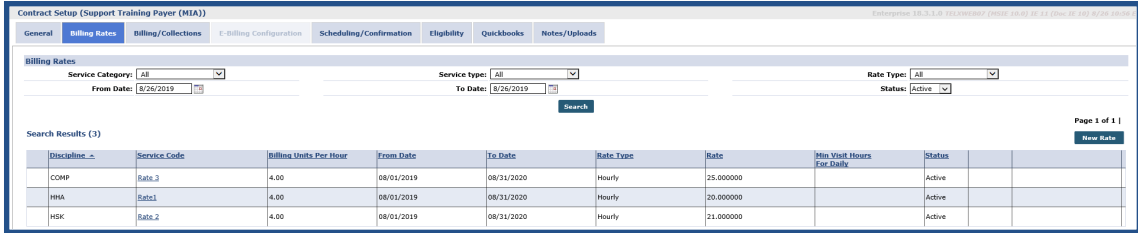
Refer to the **Communications Module** in the [Linked \(Contract\) Patients category](#) for complete details and functionality.

Rates

As part of the implementation process, HHAX works with the Payer and Provider to develop and maintain policies and procedures. Some Payers may choose to manage and maintain the rates. In these cases, Agencies can review rates but not edit.

If discrepancies are detected, then the Agency contacts the Payer via the Notes function in the Communications Module. Refer to the Communications Module in the [Linked Patients category](#) for complete details and functionality.

Follow the steps below to review Rates.

Step	Action
1	Navigate to Admin > Contract Search to locate the Linked Contract. Click on the desired Contract (link).
2	<p>The <i>Contract Setup</i> page opens. Select the <i>Billing Rates</i> tab. Contract rates appear in the Search Results for the Provider to view.</p>  <p style="text-align: center;">Contract Setup - Billing Rates Tab</p>

Single Patient Shell

In some cases, Providers are forced to maintain multiple Patient profiles for a single Patient due to a combination of Linked and Internal Contracts (one kept for each instance). Providers can connect multiple Patient records under one default Patient shell and quickly jump between all Patient records associated with the Patient’s Medicaid ID. The purpose of this enhancement is to provide efficiency by diminishing incorrect census and search difficulties.

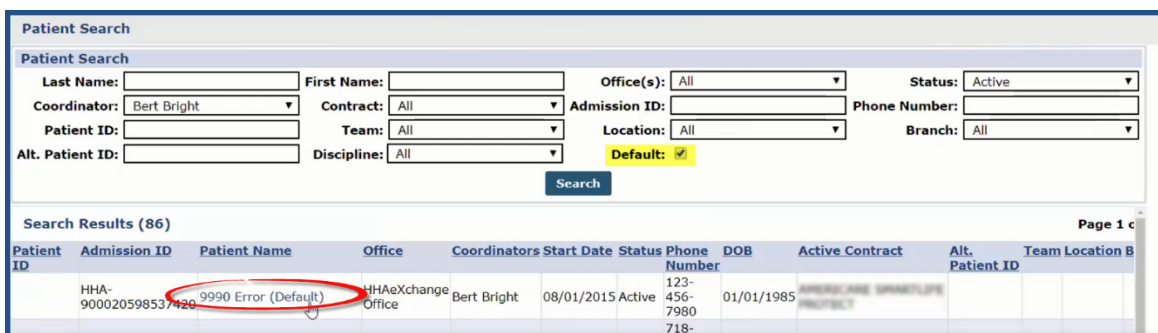
The **Single Patient Shell** organizes and manages Patient records allowing Providers to connect all associated records. Moreover, it allows for easier navigation between records, provides suggested Patient matches on New Placements, and improves efficiencies by fixing census issues and makes it easier to locate Patient records.

This functionality has been built into the *Patient General* page and is available to all Providers.

Note: Although recommended to easily identify, connections can be made even if no Medicaid ID is provided.

Patient Search

On the *Patient Search* page, a **Default** checkbox has been added allowing users to search for Default Patient records. This option helps with Patient census as it groups similar Patient records together instead of individual records. This option can be selected/deselected (as needed). On the search results, Patients with grouped profiles are displayed with a Default label following the Patient Name (as seen in the image below).



The screenshot shows the 'Patient Search' interface. At the top, there are search filters for Last Name, First Name, Office(s), Status, Coordinator, Contract, Admission ID, Phone Number, Patient ID, Team, Location, Branch, Alt. Patient ID, and Discipline. A 'Default' checkbox is checked. Below the filters is a 'Search' button. The search results are displayed in a table with 86 results. The table has columns for Patient ID, Admission ID, Patient Name, Office, Coordinators, Start Date, Status, Phone Number, DOB, Active Contract, Alt. Patient ID, and Team Location B. The first row shows a record with '9990 Error (Default)' in the Patient Name field, which is circled in red.

Patient ID	Admission ID	Patient Name	Office	Coordinators	Start Date	Status	Phone Number	DOB	Active Contract	Alt. Patient ID	Team Location B
	HHA-900020598537420	9990 Error (Default)	HHAexchange Office	Bert Bright	08/01/2015	Active	123-456-7980	01/01/1985			

Patient Search - Default Record

Other Placements

The Single Patient Shell setting resides in the *Patient General* page under the **Other Placements** section. Multiple records are indicated by the various Admission IDs which are linked to the same Patient. Click the **Edit** button to open the section.

Patient Info - Active

Name: Sanderson George (default) **Payer Name:** Sandy Health System **Frequency:** **DOB:** 02/15/1950 **Payer Coordinator:** Jon Franqui
Admission ID: BOR-10922 **Patient ID:** **Office:** Boris's Office **Address:** 11011 **Coordinators:** Carol Hill
Home Phone: **Address:** 11011

Other Placements

Default	Admission ID	Active Contract	Start Date	Status	Unlink
<input type="checkbox"/>	BOR-10811	Another Payer	10/11/2018	Active	X
<input type="checkbox"/>	BOR-10555	Payer 3	09/02/2017	Active	X
<input type="checkbox"/>	BOR-10334	Aetna	08/15/2016	Discharged	X

Patient General Page - Other Placements Section

Clicking **Edit** enables the Other Placements section. From here, users can manually set a Default record, unlink a record, or add records for the Patient.

Patient Info - Active

Name: Sanderson George (default) **Payer Name:** Sandy Health System **Frequency:** **DOB:** 02/15/1950 **Payer Coordinator:** Jon Franqui
Admission ID: BOR-10922 **Patient ID:** **Office:** Boris's Office **Address:** 11011 **Coordinators:** Carol Hill
Home Phone: **Address:** 11011

Other Placements

Default	Admission ID	Active Contract	Start Date	Status	Unlink
<input type="checkbox"/>	BOR-10811	Another Payer	10/11/2018	Active	X
<input type="checkbox"/>	BOR-10555	Payer 3	09/02/2017	Active	X
<input type="checkbox"/>	BOR-10334	Aetna	08/15/2016	Discharged	X

Other Placements Section - Edit Mode

Click the **Add Placement** button to view all possible linked records (*Suggested Patient Matches*) for the Patient based on **Medicaid ID**. From here, select the applicable Patient record match by checking the box to the left of the Patient Name and click **Add** to continue.

The following patient can be connected to this patient records.

Patient Name	DOB	Medicaid	Status
Bond James	10/12/1990	XX123456789	Active

Suggested patient matches

Select	Patient Name	Active Contract	Start Date	Status
<input type="checkbox"/>	Shah Nirja	GUILDNET, CIPRO, AXA LIFE	03/01/2015	Active
<input type="checkbox"/>	Mark Steve	Private Pay, AXA LIFE, AMERICARE SMARTLIFE PROTECT	07/09/2016	Active
<input type="checkbox"/>	Excellence Developer	Contract Excellence 1	07/05/2017	Active
<input type="checkbox"/>	Shah Nisha	AB, Contract, GUILDNET	01/01/2018	Active
<input type="checkbox"/>	Pandeuuyuyy Sushantttt	Private Pay, AMERICARE SMARTLIFE PROTECT	02/01/2018	Active
<input type="checkbox"/>	George Sanderson	Payer 3	08/16/2017	Active

Suggested Patient Matches based on Medicaid ID

Note: The Suggested Patient Matches list contains all the accepted and confirmed Placements by the Provider (providing that the Medicaid ID is available). If a **Medicaid ID** is not available, click the **Select a Different Patient** button to search for another Patient record.

The system provides all the possible Patient records which can be connected to the Patient. Select the pertinent record(s) and click **Add**.

The following patients can be connected to this patient record.

Admission ID	Patient Name	Medicaid ID	Active Contract	Start Date	Status
SAN-10822	George Sanderson	XX123456789	Sandy Health	10/16/2018	Active

Select the patient record(s) to be connected:

Select Patient	Admission ID	Patient Name	Medicaid ID	Active Contract	Start Date	Status
<input type="checkbox"/>	BOR-10988	George Sanderson	XX123456789	Payer 3	08/16/2017	Active
<input type="checkbox"/>	BOR-10533	Georgie Sanderson	XX123456789	Aetna	07/16/2017	Inactive

Patient Record Matches

The following image illustrates how an existing Placement appears in the system for a linked record. To connect the records, click the **Select Patient** checkbox. The existing record shows as the default profile. If applicable, check the **Make Default** checkbox to make the new placement the default. Click **Connect** to link the two profiles. Click **Keep Separate** to maintain separate records in the system.

The placement appears to be for an existing patient.

Make Default	Admission ID	Patient Name	Medicaid ID	Active Contract	Start Date	Status
<input type="checkbox"/>	SAN-10822	George Sanderson	XX123456789	Sandy Health	11/1/2018	Accepted

Select the patient record(s) to be connected:

Select Patient	Admission ID	Patient Name	Medicaid ID	Active Contract	Start Date	Status
<input checked="" type="checkbox"/>	BOR-10988	George Sanderson (default)	XX123456789	Payer 3	08/16/2017	Active

Connecting Patient Profiles

Once selected, the record is added to the Patient's Other Placements section. Note only one Default record can be selected at a time.

Patient Info - Active

Name: Sanderson George Payer Name: Another Payer Frequency: Payer Coordinator: Jon Franqui
 Admission ID: BOR-10811 Patient ID: DOB: 02/15/1950 Coordinators: Carol Hill
 Home Phone: Office: Boris's Office Address: 11011

Other Placements						Edit
Default	Admission ID	Active Contract	Start Date	Status	Unlink	
<input checked="" type="checkbox"/>	BOR-10922	Sandy Health System	11/01/2018	Active	X	
<input type="checkbox"/>	BOR-10555	Payer 3	09/02/2017	Active	X	
<input type="checkbox"/>	BOR-10334	Aetna	08/15/2016	Discharged	X	

Other Placements Section - Default Patient Profile

Provider Multiple Office (Assigning Patients)

Some Patients may be assigned by the Linked Payer to a specific office. If the Provider has more than one office, the Linked Payer can assign the Patient as a single “Unspecified Office” placement. The Provider may then select which Office to assign the placement to before accepting the case via the **Office** field in the *Placement* window.

Refer to the **Linked Patient Office** section in the [Linked Patients category](#) for further details and instructions.