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Scheduling

Overview

This category covers the **Scheduling** functionality providing instructions and guidance when scheduling and adjusting visits for Internal Patients in the HHAeXchange (HHAX) system. There are two visit classifications to include **Skilled** and **Non-Skilled**.

Skilled Visits (clinical) involve care by a licensed medical professional (such as a Nurse or Physical Therapist). **Non-Skilled Visits** involve assistance with daily routines, grooming, and general support.

There are three options when creating a new visit (Skilled or Non-Skilled), as follows:

- Manually entering the new visit on the Patient's or Caregiver's **Calendar** page
- Using the **Copy and Create** function on the Patient's or Caregiver's **Calendar** page.
- Creating a Master Week.

Once a visit is saved, the system automatically performs a series of validations and authorization checks to ensure that the scheduled visit does not breach any Agency rules or contractual obligations.

Because each Patient may have unique services or scheduling requirements, HHAX recommends that scheduling is performed from the Patient's **Calendar** page. Furthermore, scheduled visits on the Patient's **Calendar** displaying in pink indicates not adhering to contractual authorization.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAX Support Team.

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 ser- vices.	
Caregiver Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is 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.	
ННАХ	Acronym for HHAeXchange	



Creating Visits

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

This section provides a high-level instruction on how to schedule visits using the Patient **Calendar**, as well as scheduling using the **Master Week** function.

Non-Skilled Visits

Non-clinical visits in the system are classified as **Non-Skilled**, meaning only non-skilled disciplines can be assigned to them. Follow the steps below to create a non-skilled visit.

Step	Action	
1	Navigate to the desired Patient and click the Calendar page on the Index.	
	Click on the <u>date number</u> (hyperlink) at the top-right of the Calendar cell and select " New non- skilled visit" from the options.	
2	Calendar Month: July Year: 2018 Sunday Monday Tuesday 1 2 3 New skilled visit % 10 News Killed visit % Notes 10	
	Creating a Non-Skilled Visit	
	The Non-Skilled Schedule window opens on the visit Schedule tab. Complete the required fields (denoted with a red asterisk). Note: If a Caregiver is marked as Absent , has a Restriction for the select Contract, or is scheduled for an In Service on the date of the visit, the system issues a warning either requesting confirmation or stating that the selected Caregiver cannot be scheduled.	
	HHAckchange - Non Skilled Schedule	
3	Schedule: • Schedule Time: 0000 - 1000 • Temporary Caregiver Code: 15-1334 POC: 2176390-05001/7 • Assignment Dig Import Partice Import Partice Import Partice • Primary bill to: etrice • Import Partice Import Partice Import Partice • Import Reference Number: Visit Type: Visit Type: Visit Schedule Visit tab – Scheduling a Non-Skilled Visit Schedule Visit Schedule Visit	
	Note: The Visit Info and Bill Info tabs are used to review visit information <u>after</u> the visit has been com-	



Step	Action
	pleted and billed.
4	Click the <i>Save</i> button to schedule.
5	Once saved, the system automatically performs a series of validation and authorization checks to ensure any Agency rules or contractual obligations are not breached. If a validation error is detec- ted, then the system warns or restricts one from saving the visit. Visits displayed in green are within Authorization parameters, while those in pink indicate an Authorization issue, as illustrated in the image. S:0800-1300 T O S:0800-2000 T O O S:0800-2000 T O O S:0800-2000 T O O S:0800-2000 T O O O S:0800-2000 T O O O O O O O O O O O O O O O O O
	display in white.

Visits scheduled with a **Service Code** that is not covered by the Authorization, or setup to bypass Prebilling validations also display in white, even if within the 14-day block. Consult with an Administrator to discuss which **Service Codes** the Agency has authorized to skip Prebilling validations.



Skilled Visits

Skilled visits (Clinical) are those involving medical services and only skilled disciplines (such as Nurses or Physical Therapists) can be assigned to them. Follow the steps below to create a Skilled visit.

Step	Action			
1	Navigate to the desired Patient and click the Calendar page on the Index.			
	Click on the <u>date number</u> (hyperlink) at the top-right of the Calendar cell and select " New skilled visit " from the options.			
2	10 11 1 New skilled visit New non-skilled visit Notes			
	Creating a Skilled Visit			
	(denoted with a red asterisk)			
	Visit Info Bill Info			
	Schedule:			
	* Schedule Time: 1000 - 1200 Confirm Visit M Temporary Temp Temp Assignment ID:			
	Pay Code:			
-	Primary bill to: Aetna Secondary bill to: -Select			
3	* Service Code: RM Visit ✓ Service Code: Select ✓ * H: 02_M: 00 H: M:			
	Bill Type: Visit Bill Type: Include in Mileage: 3			
	Visit Information			
	Scheduled Time: 7/11/2018 7/11/2018 Visit End Time: 7/11/2018 7/11/2018			
	EVV Call In: EVV Call Out:			
	No Data Found.			
	Schedule Visit tab – Scheduling a Skilled Visit			
4	Click the <i>Save</i> button to schedule.			



Step	Action	
	Once saved, the system automatically performs a series of validation and authorization checks to ensure any Agency rules or contractual obligations are not breached. If a validation error is detected, then the system warns or restricts one from saving the visit. Visits displayed in green are within Authorization parameters, while those in pink indicate an Authorization issue, as illustrated in the image.	
5	S:0800-1300 T 9 S:0800-2000 T 10 RN - SKIL 11 Vi Vi S:1000-1200 T Vi S:1000-1200 T Vi B: N Sinder D Adele T Scheduled Visits Scheduled Visits Sinder D Adele T Sinder D Adele T Sinder D Adele T	
	Note: The system only reviews visits in a 14-day block based on the current date. visits outside of this range display in white.	

Patient Calendar – Unauthorized Visit Reasons

The Patient Calendar includes reasons for Unauthorized visits (displayed in pink). Hovering over the red "thumbs down" icon displays a pop-up message indicating the reason the visit is not Authorized, as seen in the following image.



Unauthorized Visit Reason (Pink)

Note: A visit may have multiple un-authorization reasons. Hovering over the icon shows a single reason at a time. If corrected, then the second reason displays.



The following table provides a list of Scenarios, the associated Unauthorized Visit Reason and a description for each.

Scenario	Unauthorized Visit Reason	Description
Exceeds Guardrail Limit	Insufficient Authorization - Guard- rails	Visit does not have sufficient authorization because of a monthly Guardrail limit
Additional Rules	Additional Rules – Failed Val- idation	Visit fails Additional Rules validation
Service Code	Authorization not available with this Service Code	Missing Service Code or the Service Code is not valid for the Authorization Type
No Authorization	Authorization Not Available	No Authorization available for the visit
Visit Out of Authorized Date Range	Authorization Not Available	Visit falls outside of Visit Start or End Date
Visit less than 15 Minutes	Visit less than 15 Minutes	Visit is less than 15 minutes
Blackout Date	Blackout Date	Visit on a blackout date
Daily Period Type Author- ization with Time Restric- tions	Insufficient Authorization	Visit scheduled outside of Daily Period Type Time Restrictions
Manual Authorization	Manual Authorization	Manual intervention required due to a manual Authorization
Missed Visit – Travel Time	Insufficient Authorization	Missed Visit Travel Time approval
Weekly, Monthly Author- ization (Type 1)	Insufficient Authorization	Visit exceeds the allowed Max Units per Period
Billing Adjustment to use Authorization Units	Insufficient Authorization	Billing adjustment causes the visit to not have suf- ficient Authorization
Daily, Weekly, Monthly Authorization (Type 2)	Insufficient Authorization	Visit exceeds the allowed Max Units for the Entire Authorization
Primary/Secondary Con- tract	Insufficient Authorization	Primary and Secondary Contract together do not have sufficient Authorization for a visit
Weekday (Specific Date Type)	Visit cannot be scheduled to start on a Weekend	Visit is authorized for a specific date type (week- day) but the visit is scheduled on the weekend or holiday
Weekend (Specific Date Type)	Visit cannot be scheduled to start on a Weekday (unless a Holiday)	Visit is authorized for a specific date type (week- end/holiday) but the visit is scheduled on a week- day



Visit Authorization Allocation

Agencies may review and edit Authorizations automatically applied to Scheduled visits on the visit *Bill Info* tab.

Non Skilled Visit:		Master	week update
Admissic 1D: 10-5	%//// /	Jo. at Jo. Jn.	
Schedule Visit Info	Bill Info		
Primary Bill To: <u>History</u>	Secondary Bill To:	History Payroll Details:	Histor
Primary bill to: Caring Hands LLC	Secondary bill to:	Payroll Type: Hourly	
Service Code: HHA Standard	Service Code:	Pay Code: HHA Base	
Bill Type: Hourly	Bill Type:	Service Hours:	~~~
່⊿ei、⊿di、∠os number(s):	verd. vor number(s):		*
e-Billing Batch#:	e-Billing Batch#:	Distance from Last Loc: (j)	
Authorization (Auto)		Mileage Rate: (1)	
		Mileage Expense Total: (1)	
Authorization Number Units WK30459 2.00 X		Expense Payroll 🕦 Batch#:	
Visit Schedule Units: 2.00			
	Save C	lo se	

Authorization on Bill Info Tab

The Authorization section of the Bill Info tab contains the following fields / functionality:

Field / Functionality	Description		
Authorization Number	The Authorization currently assigned to the visit. This field also contains all the Authorizations associated with the Patient applicable to the visit. For example, if the Scheduled visit is for Non-Skilled service, only Author- izations for Non-Skilled service are available.		
Units	 Allows one to set the number of Units from the Authorization applied to the visit. For Hourly Service Codes, a Unit equals 1 hour; therefore, a visit scheduled for 4 hours equals 4 Units. A 3-hour and 15-minute visit equals 3.25 units. Visits scheduled with a Daily or Visit Service Code always display as 1 Unit. 		
Add (button)	Allows one to apply additional Authorizations to the visit.		

The Enterprise System



The Authorization functionality is available for both **Primary** and **Secondary** Contracts, allowing Agencies to split Authorization hours between the two:

Deleted invoice number(s):	Deleted invoice number(s):
e-Billing Batch#:	e-Billing Batch#:
Authorization (Auto) Add	Authorization (Auto) Add
Authorization Number Units	Authorization Number Units
Auth 1 3.00 X	Auth 2 1.00 X
Visit Schedule Units: 3.00	Visit Schedule Units: 1.00
	Save Close

Set Primary / Secondary Authorizations

The **Authorization** section of the *Bill Info* tab has several "statuses" depending on how the Authorization is applied to the visit, as well the Contract's scheduling requirements, as follows:

Status	Description		
	This status indicates that the system assigned the Authorization(s) to the visit.		
Authorization (Auto)	Authorization (Auto) Add Authorization Number Units WK30459 ▼ 2.00 X Visit Schedule Units: 2.00 X		
	Authorization (Auto) Status		



Status	Description
No Matching Author- ization Found	This status indicates that the system was unable to assign an Author- ization that matches the visit details (e.g., no Authorization for selected Caregiver skill type).
Authorization Not	This status indicates that the selected Contract does not require an
Required	Authorization to schedule visits. Authorization (Auto) Authorization Not Required Visit Schedule Units: 2.00
No Authorization	This status indicates that that an existing Authorization has been deleted
Selected	and a new one was not assigned.

Validations and Scheduling Scenarios

This section covers scheduling scenarios and validations caused by the addition of the **Visit Authorization Allocation** function.

Over/Under Applying Authorization Units

Over or under applying Authorization **Units** to a visit results in a validation error. For example, if a single Authorization **Unit** is applied a to a visit scheduled for 2 hours, one is only authorizing a single hour of the visit. In the other hand, applying 3 Authorization **Units** to a 2-hour visit authorizes an hour of non-scheduled service.

The Enterprise System



The system does not allow for either scenario. If over or under Authorization **Units** are applied, the following validation messages display:



Over Applying Units Validation Error

Apply Zero Authorization Units

Users may choose to apply 0 Authorizations **Units** to a visit without triggering a validation error. Instead, the visit displays in pink, indicating that it is unauthorized and will be held on the **Prebilling Review** page. The system requests confirmation before saving a visit with 0 Authorization **Units**.



Confirm Zero Authorization Unit Entry

"Manual" / "Automatic" State Visit Logic

Authorizations applied to Visits may exist in two states: Automatic and Manual.

An **Automatic** state refers to a visit Authorization unedited or removed by a user. The Authorization/Units are automatically applied to the visit by the system at the time of scheduling. When a visit Authorization is in this state, the system automatically updates the Authorization information with respect to changes to the visit schedule.

A **Manual** state is when a user manually edits, removes, or adds Authorization information (for either the Primary or Secondary Contract) to a visit. In this case, the system does not automatically adjust the Authorization to fit changes to the visit schedule. More specifically, if the visit schedule duration is extended or the Service Code is changed, the system automatically reduces the Authorization **Units** to 0. The visit subsequently turns pink on the Patient **Calendar** signifying that there is an Authorization issue.



The system reduces the number of applied **Units** in a "Manual" state if a visit is rescheduled with a shorter duration.

This logic also applies when the Authorization is edited on the Patient **Authorization** page. The system reassesses visits in an "Automatic" state to ensure they are still compliant, whereas visits in a "Manual" state are automatically reduced to 0 **Units**.

Bypass Pre-Billing / Authorization Not Required Logic

If the **Service Code** selected for the **Primary Contract** is set to bypass Prebilling validation, or the **Primary Contract** does not require an Authorization, the visit Authorization section for both the **Primary** and **Secondary Contract** is set to "Authorization Not Required" (as illustrated in the following image).

Schedule	Visit Info	Bill Info		
Primary Bill To:	History	Secondary Bill To:	History	Payroll Details:
Primary hill to: Saring Han	ds UIC	Secondar bill to Privat P	ay Chiginal	Payrell Type Ho
aus .(s,		us dry		rileas . 🖱
e-Billing Batch#:		e-Billing Batch#:		Distance from ()
Authorization (Auto)		Authorization (Auto)		Last Loc:
Authorization Not Required		Authorization Not Required		Mileage Rate: (1)
Visit Schedule Units	: 1.00	Visit Schedule Un	its: 1.00	Mileage Expense (1) Total:
				Expense Payroll 1 Batch#:
				4
		Save	Close	

Authorization Not Required

Invoice Logic

When invoicing a visit with more than one Authorization applied to the **Primary Contract** and/or **Secondary Contract**, the system applies the first Authorization for each to the invoice. For example, in the following image, **Auth 1** for **Primary Contract** and **Auth 3** for the **Secondary Contract** would be applied to the invoice for this visit.

Schedule	Visit Info	Bill Info		
Primary Bill To:	History	Secondary Bill To:	History	Payroll Details:
Primary bill to: Caring	Hands LLC	Secondary bill to: Private	Pay Original	Payroll Type:
Service Code: HHA S	tandard	Service Code: Private	Pay Hrly	Pay Code:
and the second				Sec. 10
ь ла. я ≰	LUCE OG	\ \ \		miledue Kale:
Authorization (Manual)	Add	Authorization (Manual)	Add	Mileage Expense Total:
Authorization Number	Units	Authorization Number	Units	Expense Payroi. Batch#:
Auth 2	1.00 🗙	Auth 4	1.00 🗙	
Visit Schedule U	Jnits: 1.00	Visit Schedule U	nits: 1.00	
		Save	Close	

Auth 1 and Auth3 Appled to Invoice



Authorization Deletion Logic

Any visits associated with an Authorization that have been billed or exported cannot be deleted. If a user attempts to delete an authorization where visits have been billed or exported, the system displays the following message: "This Authorization has already been applied to billed visits and cannot be deleted."

Copy and Create Tool

With the **Copy and Create** tool apply new visits to the **Calendar** in either of the following ways:

- Select **Copy** to duplicate visit information to a 'clipboard'. Once copied, apply the visit information to other dates.
- Select **Copy and Create** to copy the visit information and open a new window to apply the information to other dates and also edit the visit information.

The following tables provide step-by-step instructions on how to use the **Copy and Create** tool.

Copy a Visit

Step	Action
	From the Patient's Calendar page, click the Copy and Create icon on the right side of the Cal- endar day cell (as illustrated in the image). Click Copy . The system informs that the visit details have been copied to the clipboard.
1	8 5:0800-1300 T V: B: N Copy Copy Copy and Create 15 Copy Visit
2	Once copied, click on the <u>date number</u> (hyperlink) in the desired Calendar day cell. Select Paste visit information from the options.
	Paste Visit Information







Copy and Create Multiple Visits

Step	Action
	From the Patient's Calendar page, click the Copy and Create icon on the right side of the Cal- endar day cell (as illustrated in the image). Click Copy and Create . The system informs that the visit details have been copied to the clipboard.
1	12 13 5:1000-1400 1 V:- I B: N I Abreu Copy Alex Copy and Create
	The <i>Copy and Create Multiple Visits</i> page opens. Select the checkboxes in the right column to copy the visit information to multiple days. Visit information may also be edited for each day it is applied to.
2	Copy and Create Multiple Visits Schedule: Schedule: Schedule: POC: 1842575-12/02/15 Poc: 1842575-12/02/15 Primary bill to: Caregiver: Service Code: 1842575-12/02/15 Primary bill to: Caregiver: Service Code: 1842575-12/02/15 Service Code: 1842575-12/02/15 Service Code: 1842575-12/02/15 Service Code: 1842575-12/02/15 Timesheet: Required: Approved Rews Per Day: To Date: [2/257016 Rews Per Day: IV Include in Nilesge: Contract (Primary/Secondary) Include in Nilesge: Secondary Niles Include in Nilesge: Contract (Primary/Secondary) Include in Nilesge: Contract (Primary/Secondary) Include in Nilesge: Secondary Nilesge: Include in Nilesge: Secondary Nilesge:
	Copy and Create Multiple Visits
3	Once the visit information has been applied to the selected days, scroll down and click the <i>Save</i> button. Refresh the webpage to see the updated Calendar .



Setting a Master Week Schedule

If a Patient receives the same service on a regular basis, the **Master Week** function is used to generate a permanent schedule. Once set, the system uses the information in the Master Week to update the Patient's Calendar every night for 14 days into the future in a process known as "roll over." Any changes to the Master Week are reflected in future visit when it "rolls over" again.

Note that if a Master Week schedule results in a Caregiver surpassing the Agencies set overtime threshold, the Master Week only needs to be validated once. The system does not inform/require users to validate the Caregiver's overtime in the future. Refer to the <u>Overtime Validation</u> section of this document for further information.



Creating a Master Week

Complete the following steps to create a Master Week.

Step	Action
1	Navigate to the desired Patient and click the Master Week link on the Index.
	On the Master Week page, click the Add Master Week button.
	Patient Info - Active Name: Lanister Sean Admission ID: LIS- 7897654654321734 Patient ID: Contract: Aetna, Amazing Health D08: 06/18/1930 Primary Alt. Patient ID: 305-321-1234 Address: 50 S River Drive, MIAMI, FL, ® 33138 Coordinators: Carol Hill Office: Lisset's Office Languages: English Last 3 authorizations
2	Contract Auth. # From Date To Date Discipline Sxc. Code Max units for Type Period Max. S M T W T FS Remaining Notes Amazing 45454545 01/01/2018 01/01/2018 01/01/2019 HHA HHA Hrly N/A Hourly Daily 5.00 8.00 8.00 5.00 0.00 Image: Contract in the C
	From Date: 7/10/2018 To Date: 7/24/2018 Save & Update Calendar Add Master week
	Adding a Master Week
	The Add/Edit Master Week screen opens. Set the Master Week date range in the From/To Date fields. The From Date field is required. The To Date field is optional and may be left blank for indefinite stop date. If a To Date is entered, the system does not generate visits from this Master Week past that date.
	version of this window (next sten)
	Add/Edit Master Week
3	Copy Master Week Sunday Monday Tuesday Wednesday Thursday Friday Saturday Hours -
	Pay Code: Select
	Creating a Master Week
	The Select Days window opens allowing one to set visit details and apply them to different days
4	be selecting the corresponding checkbox, as illustrated in the image. Click the OK button to con-
	tinue (return to the Add/Edit Master week window).





Step			Action											
			elect Days											
			Hours: 0800 - 1200											
			Caregiver: 1000 2											
			Asei ID.											
			Pay Code:											
			POC:Select											
			Bill To: Aetna											
			H: [04] M: [00]											
			Service Code: HHA Hourly											
			Rate Type: Hourly											
			Saturday											
			Sunday											
			Monday											
			Tuesday											
			Wednesday											
			☐ Thursday											
			Set Visit Details using Hours Link											
	On the A	dd/Edit Master We	ek window, the selected days and visit details are displayed. Click the											
	<i>Save</i> button to finalize the Master Week.													
	Add/Edit	Master Week												
		1) * From Date: 07/10/2018	To Date:											
	Com	Master Week Cunday	Mandau Tuandau Wadaandau Thumadau Faidau Cabudau											
	<u>COPY</u>	Hours: -	O800 - 1200 - 0800 - 1200 - 0800 - 1200											
		Caregiver: 2	1000 2 2 1000 2 2 2 Temp Temp Temp Temp Temp Temp Temp Temp Temp Temp											
5		Assi. ID:	010101 010101 010101											
		POC:Select V	Select VSelect VSelect V											
		Bill To:Select 🗸	Aetna Select Aetna Select Image: Aetna											
		H: 0 M: 0												
		Service Code:Select V	HHA HourlySelect V HHA HourlySelect V HHA HourlySelect V											
	•	ے وہ م ے												
			Save											
			Save the Master Week											
	At the bo	ottom of the page.	lick the Save & Update Calendar button to "roll over" visits onto the											
	Calendar	hased on the Mast	er Week details											
	culciluui	based on the Mas												
6														
		From Date: 7/10/20	8 To Date: 7/24/2018 Save & Update Calendar											
			Save & Update Calendar with Master Week											



Editing/Deleting a Master Week

To edit a Master Week, click the **edit** icon, as seen in the image below. To delete a Mater Week, click on the red (X) icon to the right of the edit icon.

Master Week	The information has been sav	ed and a rollover req	uest has been registe	ered!	History
07/10/18 - 🗉	Sunday <u>Alt.</u> Hours:	Monday <u>Alt.</u> 0800 - 1200	Tuesday <u>Alt.</u>	Wednesday <u>Alt.</u>	dy <u>Alt.</u>
	Caregiver:	1000 Temp Temp	Click icon to E	dit the Master Week.	5

Edit/Delete Master Week

By default, the system rolls over the Master Week for the 14-day range in the **From** and **To Date** fields. If desired, adjust the date range and roll over Master Week details to other date ranges.

Note that a Master Week does not rollover if a Patient's Authorizations do not cover the future dates; unless the Contract authorizing service for the Patient permits the Master Week to generate unauthorized visits using the **Allow Masterweek Rollover without Valid Authorization** checkbox on the **Contract Setup** page under the *Scheduling/Confirmation* tab.



Multiple Master Weeks

If visit times and date ranges do not overlap, one can enter multiple Master Weeks for a Patient. These are common in the following special scenarios:

The Patient has multiple shifts on the same day. If the Patient consistently receives service in the morning and then again in the evening, one can add one Master Week for the morning shift and another for the evening shift.

The Patient has "tapered" service. If the Patient's schedule changes on a set basis: for example, the Patient receives 5 visits per week for one month, then 4 visits per week the next month, then 3 visits per week the following month. In this scenario, once can enter one Master Week with a date range for the first month, a second for the next date range, and a third for the final date range.



For some permanent schedules, aspects of the schedule alternate from week to week. For example, every other Sunday a different Caregiver might work, or every third week the Patient requests services in the afternoon instead of the morning. In these scenarios, an Agency can set an **Alternate Master Week** schedule. Once set, the Master Week rollover alternates back and forth based on what is set here.

Step Action 1 Navigate to the desired Patient and click the **Master Week** link on the Index. On the Master Week page, each weekday has an Alt. link. Click on the applicable Alt. link. Master Week 06/05/17 - 06/07/17 Sunday Alt. Thursday Alt. Saturday Alt. Monday Alt. Tuesday Alt. Friday Alt. Wednesday Alt. 1000 - 1200 1000 - 1200 Z X 1000 - 1200 -Hours 2 LIS-1350 LIS-1350 LIS-1350 Lafleur Bianc Caregiver: From Date: 7/12/2018 To Date: 7/26/2018 Save & Update Calendar Add Master week Alt. Master Week Link The Alternative Shifts window opens for the selected day displayed the visits details. Click the Add Alternate Shift link to add an alternate record. hifts for Mor Admission ID: LIS-7897654654321417 Patient ID: Patient Name: Trainor Wil Primary Contract: Amazing Heal Authorization For Monday Date of Birth: 02/01/1945 S. H S. M S. Srv Code S. nau 3 S. Bil Type. From To Caregiver # Time & Att Pay Code POC Bill to P. H P. M P.Srv Code 1000 1200 LIS-1350 2 HSK Hrly 2176392 Amazing He 2 00 HSK Hrly 2 00 00 --Select-- V 100350 Save Close **Alternate Shifts Master Week Window** The Add Alternative Master Week Shift window opens. Make the necessary additions for the selected day. Click the Save button to finalize. ernate Masterweek Shift for Monda Hours: 1400 - 1600 Caregiver: LIS-1350 afle Bianca Assi. ID: Pay Code: HSK Hrly < 4 POC: 2176392 ~ Bill To: Amazing H ~ H: 02 M: 00 e Code: HSK Hrly_ANT ~ Rate Type: Hourly **Alternative Shift** Once saved, the Alternative Shift displays on the Master Week header in red, as illustrated in the 5

Complete the following steps to create an Alternative Shift.

X HHAexchange



Step		Action
	image below.	
		Master Week
		06/05/17 - 06/07/17 Sunday <u>Alt.</u> Monda(<u>Alt. (2)</u> -
		+ Hours: 1000 - 1200 100
		Caregiver: LIS-1350 LIS
		Lafleur Bianca Lafl
		Alternative Shift Entered
	When rolling o	over the Master Week, the system works through each alternate shift entered and
	places those v	isits on the Calendar.



Custom Master Week Length

The Master Week rollover length can be customized to fit an Agency's needs, particularly, to view and coordinate visits (schedules) on a monthly basis according to Authorization calculations. Because the Master Week rollover length may be adjusted for each Contract, the system needs to validate scheduled visits based on the Contract settings.

For example, if *Contract A* is set for the Master Week rollover length to 30 days, the system then validates up to 30 scheduled visits at a time. If *Contract B* has the rollover set for 10 days, the system then validates up to 10 scheduled visits at a time.

This feature is applicable for both Linked and Internal Patients.

Note: This Master Week Timeframe setting can only be changed by HHAX. Contact <u>HHAeXchange Cli</u>-<u>ent Support</u> for further details.

Office Setup Page

The system default is set at 14 days. To view the **Master Week Rollover Time Frame**, navigate to **Admin** > **Office Setup** > **(Search Office)** > **Edit Office** > **General** (section), as illustrated on the image to the right.

Edit Office	Enterprise 9.1.1.0 TELXQAUATD01 (MSIE 1
General	
* Office Name:	Status: Active
* Office Commisson	* Office Code:
	Web Applicant Unique URL: https://uat.hhaexchange.com/Customized07
(You can select only leaf group) 🧳	
Tax ID:	NPI No.: SProvider ID (33b):
Provider Zip Code:	Default Coordinator:
Mobile Fixed Visit Verification: 🗹 🗓	* Mobile GPS Visit Verification: 🗹 Tolerance Range (ft): 9999999999
Allow Caregiver In-Service and Visit Overlaps: 🗌 🗊	Mobile Beacon Verification: 🗹 🛈
Allow Caregiver Absence and Visit/In-Service Overlaps: 🗌 🛈	UnBalanced Tolerance: Hours 🔟 Min 3 🛈
Display MD Order Aide Tab as: Order/Code View () Order/Coal View()	Transportation Methods for Travel Time: 📶 🔽 🕽
Master Week Rollover Time Frame: 30 Days ()	

Edit Office: Master Week Rollover Field

Patient Master Week Page

When a User opens the Patient Master Week page, the **From Date** and **To Date** are automatically set based on the Patient's Office **Master Week Rollover Time Frame** settings (as described in the section above).



For example, suppose the **Master Week Rollover Time** is set for 20 days. When the Patient's Master Week is opened, the **From Date** displays as current date and the **To Date** displays as 20 days from the current date.

H: 00 M: 00 ervice Code:Select V Rate Type:	H: 00 M: 00	H: 00 M: 00	"Master Week Rollover Time Frame" is set for 20 days; therefore, the dates are automatically populated from current date +
: in Mileage:			20 days.
	From Date: 9/25/2017	To Date: 10/15/2017	Save & Update Calendar Add Master week

Patient Master Week: Automatic Rollover Date Settings

Users may choose to manually schedule for a number of days greater than the default setting (on the *Office Setup* page) on a Patient's Master Week. A manually entered schedule overrides the default **Master Week Rollover Time Frame** setting.

For example, if the **Master Week Rollover Time Frame** is set at 20 days, a User may choose to manually schedule a Patient's calendar for 31 days. In this case, the Patient's calendar is populated with 31 days of scheduled visits; however, the Authorization figures only extend up to 20 days (as per Office settings).

The Patient's Calendar displays **Green** for 1 to 20 days (October 4 to October 24), and **White** for 21-31 days (October 25 to October 31), indicating those dates past the **Master Week Rollover Time Frame** are not validated yet against the Authorization.

Last 3 authorizations	\$																					
Contract	Auth. #	From Date	To Date	Disciplin	e Svc. Code	Max units for	r Auth	Туре	Period	Ma	x. S	s	м	т	w	т	F	Remainir	ng Units	No	tes	
regil from the	-	10/04/2017	10/31/2018	HHA	HHA Hourly	N/A		Hourly	Daily		8.00	8.00	8.00	8.00	8.00	8.00	8.00			0.00		0
Test Contract	1000	07/01/2017	02/01/2018	HHA		N/A			Daily		8.00	8.00	8.00	8.00	8.00	8.00	8.00			0.00		
Calendar																				Rollo	over History	Legend
	Month: Octobe	r 🗸		Yea	ar: 2017 🗸		Search	4	•											Crea	te Visit	Print
Saturday		Sunday		м	londay		Tuesday		W	edneso	lay			Т	hursday	/			Fr	iday		
		30		1			C.0000 4400		3		400			4		400			5			6
		V:0800-1400		S V	:0800-1600		V:0800-1400			0800-1	400			y N	:0800-1	400			V:	0800-1400		
		B: N (06:00)	Ĺ	B	: N (06:00)		B: N (06:00)		B	N				B	I: N				B:	N		
		Anti win		<u>~</u> <u>~</u>	111 I WIII	<u>^</u>	AULTIN			11.1. 9910					un r wiii					1 1 1/10		
C 0000 4 400		Z		8		2	C.0000 4400		10		100			11		***			12			13
V:		V:	10	v v	:0800-1400		S:0800-1400 V:		V:	0800-1	400			v	:0800-1	400			V:	0800-1400		
B: N		B: N		B	I N	_	<u>B:</u> N		B:	N					E N				B:	N		
Am I Will		Am 1 Will		M	<u>m i wili</u>	<u>×</u>	Am 1 Will			n I Will					m i will				An An	n <u>t Will</u>		<u>×</u>
		14		15		10			17					18					19			20
S:0800-1400 V:		S:0800-140 V:	ю	> V	:0800-1400		S:0800-1400 V:		5: V:	0800-1	400			v v	:0800-1	400			V:	0800-1400		
B: N		B: N		B	N	_	<u>B:</u> N		B:	N					N.				B:	N		
Am I Will		Am L Will		X A	<u>m 1 Will</u>	×	Am 1 Will		×	n I Will					IIIW L MI					n I Will		× 1
		21		22		23	2		24					25					26			27
S:0800-1400		S:0800-140	10	S	:0800-1400		S:0800-1400		S	0800-1	400			S	:0800-1	400			S:	0800-1400		
<u>B:</u> N		B: N		B	Î N		<u>B:</u> N		<u> </u>	N					L: N				B:	N		
Am 1 Will		Am 1 Will		A A	m <u>1 Will</u>	×	Am 1 Will		× At	n I Will				× 4	m I Will				× An	n I Will		×
		28		29		30	2		31					1					2			3
5:0800-1400		5:0800-140	0	S	:0800-1400		S:0800-1400															
<u>B:</u> N		<u>B:</u> N		B	N		<u>B:</u> N															
Am I Will		Am I Will		× A	m I Will	x	Am I Will		×													

Patient Master Week Rollover Time Frame (20 days)



The Appointments Function

The **Appointments** function (Visit > Appointments) is a robust scheduling and confirmation tool which provides an alternative means of scheduling new visits, such as:

- Schedule and confirm visits,
- Create or edit Master Weeks,
- Delete scheduled visits, and
- Perform Availability Searches for multiple Patients or Caregivers at once.



The Appointments Function

Refer to the <u>Appointments Function category</u> for full details and instructions when using the Appointments function.



Selecting a Caregiver

There are several methods to search for and add Caregivers to visits to include Availability Search, Caregiver Search, or Assign to Temp. This section covers the Assign to Temp method, used as a placeholder to create a visit in the system.

Refer to the <u>Caregiver Search and Communications category</u> for full instructions and details on the various methods to search for a Caregiver, including: Caregivers (for a general Caregiver Search), Caregiver General Availability, and Fill a Specific Shift.



Caregiver Search

The **Caregiver Search** function allows one to search for a specific Caregiver using several filters, such as **Discipline**, **Team**, and **Location** to sort the search results.

Complete the following steps to perform a Caregiver Search when scheduling a visit.

Step	Action				
	On the Schedule tab, click the ? hyperlink and select the Caregiver Search option.				
1	Schedule Visit Info Bill Info Verification Schedule: 2				
	POC:Select V Assignment ID: Carger Search + Pay Code:Select V				
	Caregiver Search Option – Visit Schedule				
	The Caregiver Search module opens. Select a the desired Caregiver Search method: Caregivers,				
	Caregiver General Availability, or Fill a Specific Shift, as seen in the image below.				
	Refer to the Caregiver Search and Communications category for full instructions and details on				
	the various methods to search for a Caregiver.				
	Caregivers				
2					
	Caregiver Several Availability I'll a Specific Shift				
	Search General Availability				
	office Discipline Status				
	All All Adve				
	stepters a same a same a same a same a same a same site of states a same a same same same same same sam				
	* * * * * * * * * * * * * * * * * * * *				
	Caregiver Search Module				



Assign to TEMP

If a Caregiver is not available to assign or unknown when scheduling a visit, select the **Assign to TEMP** option to place a temporary placeholder to save the visit.

Step	Action				
	On the Schedule tab, click the <u>?</u> hyperlink and select the Assign to Temp option.				
	Schedule Visit Info Bill Info Verification				
1	Schedule Time: Caregiver Code: 2 Caregiver Code: 2				
	Availability Search				
	* Pay Code:Select-				
	Assign to Temp Option – Visit Schedule				
	The Caregiver Code field is populated by the Temp Code (with the Temp Temp name), as seen in				
	the image.				
2	Note: One can also manually enter 1000 or Temp in the Caregiver Code field to assign a temporary place- holder to the visit.				
	Caregiver Code: 1000 ? Temp Temp Assianment ID:				
	Temp Caregiver				
	Once saved, the visit displays with a Temp Caregiver on the Calendar page (as seen in the image).				
3	5 16 17 5:0800-1300 T 1 V: V: V: B: N Mark E Mark T				
	Temp Caregiver Assigned to Visit				
4	Once an actual Caregiver is found, revise the visit and replace the TEMP Caregiver with the				
	"actual" Caregiver.				

To see a list of all visits with assigned TEMP Caregivers, navigate to *Visit > Visit Search* and select **Search Open Schedules** field (as seen in the image).





Caregiver Bra	nch: All	•	Search ()pen Schedules:	✓	
						Search
Search Results	Total Visits : 9	Total Call In : 0	Total C	all Out : 0		
Coordinators	Admission.ID	Patient Name		Caregiver Code	Caregiver Name	Assignment ID
Reggie Love	<u>900014</u>	Smith Rachel				010101
Susan Robee	900013	Anderson Melissa				010101

Visits with Temp Caregivers

Note: If the **Caregiver Code** field is not updated by the time of the visit, EVVs placed by the Caregiver do not sync to the visit. As a result, the visit is held on the **Prebilling** Exception page until the calls are linked to the visit and a user manually enters a real Caregiver in the **Caregiver Code** field.



Managing Scheduling Validations

When a visit is saved, the system performs a validation check to ensure the Caregiver assigned to the visit complies with all Agency rules. These validations serve as safeguards, preventing compliance and/or audit violations. The validations an Agency chooses to employ varies on a case-by-case basis. Some potential validations an Agency may opt to enforce include:

- Ensuring the Caregiver scheduled for a visit does not exceed regular working hours.
- Ensuring the Caregiver is compliant, as per the authorizing Contracts definition.
- Ensuring that the Caregiver is not scheduled for another visit or In-Service simultaneously.

Furthermore, an Agency may choose to use this process to stop invalid visits from being scheduled, or to warn users of existing issues before saving a visit.

This section covers the validations that may be activated by an Agency.

Overtime Validations

The **Overtime Validation** allows an Agency to control whether a Caregiver may be assigned to a visit based on the number of hours they have already worked in a given week. If a Caregiver assigned to a new visit breaches the overtime threshold by working the visit, the system either stops the user from saving the visit or requests an override password.

Complete the following steps to set up an Overtime Validation.





Step	Action					
	only. Contact HHAeXchange Technical Support to revise any information in the Overtime Scheduling sec- tion.					
	Authorize users to override the overtime validation. Navigate to Admin > User Management> User Search and select the Can Override OT Limit checkbox for the selected users.					
2	Atlantic Avenue Admin Atlantic Atlantic Avenue Admin Atlantic Avenue Admin Atlantic Atlantic Atlantic Atlantic Attact Admin Attact Ad					
	Long Island City ✓ ✓ ✓ ✓ ✓ ✓ ✓					
Authorize Overtime Override If enabled, the Caregiver who can receive overtime when scheduling is shown (as seen in the image). Overtime authorization required for the following caregivers: Caregiver Name Caregiver Code Caregiver Name Caregiver Code Beesly Pam 1019 42:00 51:00 Please enter your login password to continue or cancel to abandon: * Of Validation Override:						
3	Overtime authorization required for the following caregivers: Caregiver Name Caregiver Code Current Hours Projected Hours Your profile has not been configured to permit Overtime Limit overrides. You will not be able to save this change, as it would place the Caregiver over the hourly limit for the week. Please contact your System Administrator to enable Overtime Limit overrides. OK					
	Authorization Required					



Overtime Dashboard

If an automatic adjustment to a schedule sends a Caregiver into Overtime, then it is reflected on the Overtime Dashboard (*Action > Overtime Dashboard*). The following are HHAX OT parameters set by the system at an Office level:

- When Caregiver has both Hourly and Live-In visits = **40**
- Hourly Equivalent for Live-In Shifts = 15
- When Caregiver only has Live-In visits = 20

Note: These values are common; however, an Agency can configure as desired at the Office level.

Overtime Das	Overtime Dashboard									
Overtime Dashboard View: Summary View Detail View C * Office: Excellence QA Team			nce QA Team 🔻							
* Week End Date: 04/07/2019 🗉 Caregiver Code: Caregiver Name: Discipline			e: All		•					
Caregiv	er Team: All	▼ Care	egiver Location: All		Caregiver Branch: A	•	Contrac	t: All		•
Patie	nt Team: All	• Pi	atient Location: All	*	Patient Branch: A	· · · · ·	Coordinato	r: All		۲
Override	Reason: All	• 0	T Approved By: All	*	OT Hours Greater					
	Search Report Lege			Legend						
Total Caregiv	Total Caregivers (2) Total OT Hours (15:11)									
Caregiver	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	OT Hours	Override Reason	OT Approved
	04/01/2019	04/02/2019	04/03/2019	04/04/2019	04/05/2019	04/06/2019	04/07/2019	<u>v</u>		By
<u>Neel, Prashant</u> (<u>3050)</u>	P: <u>Praveenks</u> , <u>Aptrismind</u> Cont: AMERICARE SMARTLIFE PROTECT Coor: RANI WALKER SH/CH: <u>4:00</u> /-	P: Praveenks, Aptrismind Cont: AMERICARE SMARTLIFE PROTECT Coor: RANI WALKER SH/CH: <u>10:00</u> /-	P: Praveenks, Aptrismind Cont: AMERICARE SMARTLIFE PROTECT Coor: RANI WALKER SH/CH: 10:00/-	P: <u>Praveenks, Aptrismind</u> Cont: AMERICARE SMARTLIFE PROTECT Coor: RANI WALKER SH/CH: <u>10:00</u> /-				8:30 <u>H</u>	OverTime	Nandaniya, Nikunj (mlnikunj) Apr 5 2019 5:40AM
<u>102, Production</u> (<u>2290)</u>	P: <u>Navagam, Sen</u> Cont: ABDemoContract Coor: RANI WALKER SH/CH: <u>24:00</u> /24:30 {M}	P: <u>Navagam, Sen</u> Cont: ABDemoContract Coor: RANI WALKER SH/CH: <u>1:00</u> /01:00 {M}	Travel Time 24:00	P: <u>Navagam, Sen</u> Cont: ABDemoContract Coor: RANI WALKER SH/CH: <u>0:30</u> /00:22 {LI} {M}				6:41 <u>H</u>	Automatic Schedule Adjust	Auto, Process (Auto Process (Auto Schedule)) Apr 4 2019 2:584

Action > Overtime Dashboard



The Overtime Dashboard

The **Overtime Dashboard** allows one to review all overtime authorizations made and the number of overtime hours worked. Complete the following steps to review information on the Overtime Dashboard.

Step	Action					
1	Navigate to Action > Overtime Dashboard.					
2	Use the search filters to search and view overtime information for a specific Caregiver, week, or the number of authorized hours for a specific user. The Office field is required to perform a search. Note: Only a single Office can be searched on the Overtime Dashboard at a time.					
	If viewing in Summary View , the results show summary totals for Overtime Scheduling grouped by the authorizing Coordinator, the Caregiver Team, the Caregiver Location, the Branch, Con- tracts, or Override Reason (as seen in the image below).					
3	Overtime Dashboard Overtime Dashboard View: Summary View Detail View Detail					
	Results from 08/22/2015 through 08/28/2015 Coordinator Istal Carceivers Carceivers Total Hours Carceivers Of Hours OT% Reggie Love 15 5 449:30 101:00 22,47% Isolee Jenkins 2 0 16:00 0.00% Mary Jones 4 0 66:30 0:00 0.00% Daniel Potodki 4 0 62:30 0:00 0.00% Totals: 25 5 621:30 101:00 16.26%					
	The Overtime Dashboard: Summary View					
	If viewing in Detail View , the results show a full detailed listing of Caregivers with overtime for the selected week (as seen in the image below).					
	Total Caregivers (9) Total OT Hours (400:0)					
	Carcaiver Saturday Sunday Monday Tuesday Wednesday Thursday Friday OT Override/OT Reason Approved					
	UB/221/2015 UB/23/2013 UB/23/					
4	Hamilton (38753) P:Baskin, Jonathan Cont: Senior Health Coor: Dorothy SH/CH:13:00/- (LI) SH/CH:13:00/- (LI					
	The Overtime Dashboard: Detail View					
	Visits highlighted in yellow indicate that the Caregiver begins accruing overtime for the visit. Visits highlighted pink indicate that the Caregiver receives overtime for the entire visit. The Override Reason and overriding user also display for reference.					



Compliance Validations

Compliance Validations ensure that a Caregiver with missing, incomplete, or expired documentation or certifications are not scheduled for any visits. Complete the following steps to set up **Compliance Validations**.

Step		Action				
1	Navigate to Admin > 1 ing section.	avigate to Admin > Agency Profile and scroll down to the <i>Check Caregiver Compliance at Time of Schedul-</i> g section.				
	The fields in this sec Criminal Backgroun Skilled Caregivers, v givers.	ction are the items reviewed in the Compliance Validation process. The I9 / Id, Training School, Medicals , and Evaluations fields are specific to Non- while the Prof. License / Malpractice Insurance field is only for Skilled Care-				
2	Check Caregiver	Check Caregiver Compliance at Time of Scheduling ① I9 / Criminal Background: No Warning Validate Non-Skilled Caregivers Only Training School: No Warning Validate Non-Skilled Caregivers Only Medicals: No Warning Validate Non-Skilled Caregivers Only Evaluations: No Warning Validate Non-Skilled Caregivers Only I Prof. License / Malpractice Insurance: No Warning Validate Skilled Caregivers Only				
	In each field select v lows: Validation	Agency Profile: Compliance Setup which items to include or ignore in the validation process, described as fol- If selected, the system				
	No	does not include the item in the validation process.				
3	Warning	includes the item in the validation process. If the Caregiver does not meet the proper documentation on file, the system warns the user of the issue; however, this does not prevent one from scheduling the Caregiver for the shift.				
	Validate	does not allow the Caregiver to be scheduled if missing that information.				
4	If a requirement is set to No or Warning , a warning message appears when attempting to sav Caregiver who does not meet the validation requirements (as illustrated in the following image					

The Enterprise System



ep		Action
	4	The Caregiver(Cox Sandra /1004) you have selected is not compliant for the following reasons:
		I-9 / Criminal Background [Validate] Training School [Validate] Medicals [Validate] Evaluations [Validate]
		If the compliance item is set to Validate, you cannot schedule this Caregiver until their compliance details are updated.
		Validation Warning Message
	Note: If the requireme	Validation Warning Message ent is set to Warning, click OK on the popup and proceed to schedu



Incorrect Discipline

The **Incorrect Discipline** validation ensures that the assigned Caregiver's **Employment Type** (or Discipline), matches the Patient's **Accepted Services**.

Complete the following steps to review this information.

Step	Action					
	Navigate to Caregiver > Profile to review	the Care	giver's Em	nployment Types.		
	Employment Info					
	* Туре:	Employee 🗸	н			
	* Employment Type:	PCA	ИНА			
1			🗌 РТ	□от		
-		□ ѕт	MSW	Пняк		
			RT	□ PA		
		HCSS		APC		
		Other (Skille	d) 🗌 Other (Non S	Skilled)		
		Employme	nt Type			
	Navigate to Patient > Profile to review the	ne Patient	's Accepte	ed Services.		
2			-			
	Note: When scheduling a visit, the Service Co	de values	also reflect	t the Patient's Accepted Services.		
	When scheduling a Caregiver to a visit, the system ensures the Caregiver's Employment Type					
	matches one of the Service Codes attached to the Patient. If there is an issue, an error message					
	in accies one of the Service Codes attached to the Patient. If there is an issue, an error message					
	is generated (as seen in the image).					
	Message from webpage	and the second	- Theorem			
_						
3	You are attemption of authorized to	ing to schedule a Ca work a visit of this	Discipline Type, Pleas	loyment Type is		
	Caregiver whose	Employment Type	is approved to work th	this level of		
	Service.					
				UN		
	<u></u>	Error Me	ssage			



Contract Restriction

The **Contract Restriction** validation ensures that Caregivers assigned to a visit are authorized by the Contract to work with their cases. Complete the follow steps to review an existing restriction or enter a **Contract Restriction**.

Step	Action				
1	Navigate to Caregiver > Absence/Restriction.				
2	Click the <i>New</i> button.				
	The <i>New Caregiver Restriction</i> window opens. Specify the Contract issuing the restriction, the Reason issued, and the Start Date . If the Contract did not specify an end to the restriction, the End Date field may be left blank. Click <i>Save</i> .				
3	New Caregiver Restriction * Contract: * Reason: * Reason: * Restriction Start Date: 02/01/2016 * Restriction End Date: 02/23/2016 Save Cancel				
	Note: The values for the Reason dropdown are set via the Reference Table.				
	Once saved, review and edit the restriction on the Caregiver's Absence/Restriction page.				
	Restrictions End Date End Date Contract Created New 02/03/2016 02/29/2016 Tardiness Rhans Care 02/04/2016 08:51 AM (JonNE) Edit X				
4	Existing Restriction				
	Once set, the Caregiver cannot be scheduled for visits under the specified Contract for the dur- ation of the restriction. The system also blocks users from attaching the Caregiver to a visit that falls within the restriction after it has ended.				



Declined Caregivers

The **Declined Caregiver** validation is placed as requested by a specific Patient restricting the Caregiver from working their scheduled visits. Complete the following steps to mark a Caregiver as declined.

Step	Action				
1	Navigate Patient > Caregiver HX.				
2	Click the Add button.				
3	The Declined Caregivers window opens. Complete the required fields such as Caregiver Code and Date of restriction. Select a Reason from the dropdown. Click Save. Declined Caregivers * Caregiver Code: EAT-1003 ? Caregiver Name: Barker Greg * Date: 08/27/2015 Bare Caregiver Code: Thet Allegation Save				
	Note: The values for the Reason dropdown are set via the Reference Table.				
	Once saved, the Caregiver is restricted from working visits scheduled for the Patient.				
	Declined Caregivers Add Name Date Reason Add Smith Jack 01/20/2016 Attitude Edit X				
4	All Declined Caregivers				
	Once set, all Declined Caregivers are listed on the Caregiver HX page. For Declined Caregivers, there is no option for an end date, which means records must be deleted manually to assign the Caregiver to the Patient again.				





Automated Non-Compliance Restriction

The **Automated Non-Compliance Restriction** function combines the **Contract Restriction** and the **Compliance Validation** processes by generating restrictions whenever a Caregiver is Non-Compliant. By default, the system reviews the following Caregiver compliances:

- 19 / Criminal Background
- Training School
- Medicals
- Evaluations
- Prof. License / Malpractice Insurance (Skilled Disciplines only)

If the scheduled Caregiver is missing any of the compliance requirements, the system generates a restriction for each day the Caregiver is non-compliant. This functionality generates restrictions regardless of the options an Agency has entered in the *Check Caregiver Compliance at Time of Scheduling* section.

To check whether an Agency is using this functionality, navigate to **Admin > Agency Profile** and search for the **Enable Automated Non-Compliance Restriction** field in the *General* section.

Agency Info		
		Save
General		History
*Agency Name: Northeast Homecare Service		Agency Initials: NEHS
Agency Code: 1000		Email Event:
*********************		, , , , , , , , , , , , , , , , , , , , , , , , , , , , , , , , , ,
* Accept Time and Attendance Call From: 🗹 Home Phone 🛛 🗹 Phone 2	✓ Phone 3 (1)	Hide Manual Confirmations on Confirm Timesheets Page \Box Visit start time is updated When: \Box Visit end time is updated $\textcircled{0}$
Vendor Export Hyperlink: 📃 🛈		Master-Week Rollover on Deleted Visits: 📃 🛈
MD Order ICD Code Requirement: ICD-10 Effective Date 🔽 (1)	10/01/2015	Enable Automated Non-Compliance Restrictions:
Required Fields ①		History
		- 0 - 0

Enable Automated Non-Compliance Restriction Reference Field

Note: To activate this functionality, please contact HHAeXchange Client Support.



Adjust Schedule on "Unbalanced" Visits

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

Providers can adjust the Schedule Start and End times to match the confirmed duration of a shift using the billing rounding rules setup for a given Contract. This ensures that Agencies maximize on their Authorizations and that Caregivers are fully paid for their work.

After registering a complete Visit Start Time and Visit End Time, the system compares the confirmed duration with the scheduled duration of the shift and calculates accordingly. Scheduled times are automatically updated by taking the confirmed duration of the shift and rounding based on the Contract's "Round On" configuration (*Admin > Contract Setup > Billing/Collections*), as seen in the image below.

E-Billing Configuration (i)					
Export/Print Validations for E-Billing and/or Paper Invoicing (i)					
Round On:	15 V mins Closest V				

Admin > Contract Setup > Billing/Collections

In cases where no Authorized hours remain, the schedule is still updated but the visit is tagged with a Prebilling *Authorization* exception which can be manually reviewed.

Office Settings

To enable this feature, navigate to *Admin > Office Setup*. Select the new checkbox field titled **Auto**matically Adjust Schedule to match Confirmation Times. Once selected, all confirmation times for the Office are checked against the scheduled times and are adjusted based on the Contract's Billing Rounding Rules (*Admin > Contract Setup > Billing Collections tab*).

Edit Office		Enterprise 18.0.1
General		
* Office Name: HHAe>	Xchange Office	Status: Active
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		nffi cone: HHA
Enable Mobile App Orrline Mode: 🗌 🛈		Caiculace and Pay Off Duty Time (OL f): 🗹 🗓 * Max OL/T: 📴 🗍 Inin
Mobile Offline Sync Period: 120	3	Automatically adjust schedule to match confirmation times: 🗌
Address (i)		Automatically adjust schedule to match confirmation times
Street 1: New Y	York1	When this flag is checked, schedule times will be updated to match the confirmation times for the visit. New schedule times will follow the
City: NEW Y	YORK	Contract Rounding Rules found in Admin > Contract Setup > Billing/Collections > Round On
•		

#### Admin > Office Setup

**Note:** This feature is not enabled by default. In cases of multiple Offices, use the rules applicable for the Patient's Office.



### **Disabled Visit Schedule Rounding**

If the **Disable Visit Schedule Rounding** (*Admin > Contract Setup > Scheduling/Confirmation*) is checked, and the **Automatically Adjust Schedule to Match Confirmation Times** is selected for the Patient Office, then the schedule is adjusted to match the confirmation times to the minute.

## **Patient and Caregiver Calendar**

Upon adjustment, the visit Schedule Time on the Patient and Caregiver Calendars turns **red** indicating an automatic update. This only applies to the Patient and Caregiver Calendars; all other calendar views (such as Appointments) are not changed.

Calendar	r			Rollover in p	rogressplease wait until up	date completes!	Rollover History	Legend
	Month: March	• Ye	ar: 2019 T	Search 🗸 🕨			Create Visit	Print
Monday		Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
	25	26	27	2	B S: 0415-0615 T V:0420-0625 B: N (02:00) Janya Arujun	2		loa
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<u>B:</u> N <u>(03:00</u> Caregiver T	0) 📄 Testing	B: N (03:13) Janva Arujun	B: N (01:50) Janya Arujun	B: N (02:15) Janva Arujun	B: N (03:34) Janya Arujun	B: N (03:47) Janya Arujun	B: N (04:00) Neel Prashant T	
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Click on the *Search* button to refresh the page to see any adjustments.

Patient Calendar: Adjusted Visits

## **Calculation Example**

Schedule and Confirmation times for 24-hour (or longer) visits have various outcomes; however, Schedules will never round over 24 hours, or less than the Round-On time. For example, if a Contract is set to Round On **30 min down**, but the Confirmed Time is <u>14 min</u>, then the visit actually **rounds up to 30 min** in order to prevent a 0 min visit. If it were set to Round On 15, it would adjust to be a 15-min visit.

If No rounding is set, then the system rounds to the closest 15 minutes. For example, if the Scheduled Time is 0800-1200, and the Confirmed Time is 0820-1248, then the system adjusts to **0815-1245 (the closest 15 minutes)**.

When the Schedule Time is changed then the visit(s) may be held in Prebilling. For example, if the Caregiver and Patient visits overlap, then the visit shows up in Prebilling with a *Shift/Caregiver Overlapping* problem. If the change affects Authorization, then it shows up with a *No Authorization* problem.



### **Automated Note upon Schedule Adjustment**

Upon any schedule adjustment via the auto-process, the system creates an automated Note on the Visit Info tab as seen in the following image.

Г	Source	Reason	Action Taken	Note	User	Date/Time
	C	Automatic Schedule Adjust	Schedule Adjusted	Schedule Adjusted to match Confirmed Times	Auto Process (Auto Schedule)	2019-03-27 01:32:38 Print
	C	Automatic Schedule Adjust	Schedule Adjusted	Schedule Adjusted to match Confirmed Times	Auto Process (Auto Schedule)	2019-03-25 05:58:40 Print



## **Adjusted Schedules Indicator**

When a schedule is auto-adjusted, the Schedule Time turns **red** on the Patient and Caregiver Calendars.

	13		14		15		16
S: 0300-0500	í	S: 0130-0345	í	S: 0100-0445	í	S: 0100-0500	í
V:0300-0450		V:0122-0338		V:0100-0434		V:0100-0447	
<u>B:</u> N (01:50)		<u>B:</u> N (02:15)		<u>B:</u> N ( <u>03:34)</u>		<u>B:</u> N ( <u>03:47)</u>	
Janya Arujun		Janya Arujun		Janya Arujun		Janya Arujun	

Patient Calendar: Adjusted Schedule Time

In addition, the system also checks the Authorization against the updated Schedule Time. If the visit meets Authorization, then the visit(s) display in green; or pink if Authorization criteria is not met.



**Out of Authorization** 

### **Process Monitor for Auto Schedule Update**

Track the **Automatic Schedule Adjust** in the Process Monitor (*Admin > Process Monitor*) under the *All Others* category. Every time a schedule is updated, it shows up as a separate line, with the following



details:

- **Process:** Automatic Schedule Adjust
- Started by: Auto Process
- Details: Admission ID, Schedule Time, Visit ID

Completed Processes								
Total Results(1329	Page 1 of 27   First Prev Next Last							
Process	Started By	Details	Request Start Time	Process Start Time	End Time	Duration	Status	
Automatic Schedule Update	Auto Process (Auto Schedule)	Admission ID: 900020598537797 Schedule Time: 08/22/2018 04:00:00 AM 08/22/2018 12:00:00 PM Visit ID: 206499422	4/5/2019 3:25:53 AM	4/5/2019 3:25:53 AM	4/5/2019 3:25:54 AM	00:00	Completed	
Automatic Schedule Update	Auto Process (Auto Schedule)	Admission ID: 900020598537797 Schedule Time: 08/22/2018 03:00:00 AM 08/22/2018 06:00:00 AM Visit ID: 206499422	4/5/2019 3:17:32 AM	4/5/2019 3:17:32 AM	4/5/2019 3:17:36 AM	00:00	Completed	

**Process Monitor**