

Process Guide

Managing Multi-Service, Mutual, Linked, & Live-in Visits

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Service Types

Overview

Service Types are used to categorize visits in HHAeXchange; particularly, visits which have special scheduling requirements as described in the table below. This guide covers each **Service Type** providing information on setup, use, and management.

Service Type	Description
Multiple Services	A visit that consists of several different billable services, each of which requires a unique Service Code.
Mutual with	A visit in which Caregivers provide service to two Patients at once. Mutual Visits may be scheduled at the same time without triggering validation issues. The overlapping visit structure mean Caregivers need only Clock In and Out once.
Linked with	A visit in which a Caregivers provide service to two Patients at once. Linked visits are typically scheduled as back-to-back visits. The Caregiver need only Clock In at the beginning of the first visit and Clock Out at the end of the second.
Live-in	A 24-hour visit in which the Caregiver remains at the Patient's residence overnight. Live-in visits are typically scheduled back-to-back with a single Caregiver.

Please direct any questions, thoughts, or concerns regarding the content herein to <u>HHAeXchange Cus</u>tomer 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 ser- vices.
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.
ННАХ	Acronym for HHAeXchange



Multiple Service Visits

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

Multiple Service Visits consist of several different billable services, each requiring a unique Service Code.

For example, an Agency sends **Caregiver A** to **Patient B** from 08:00 to 13:00. In that visit, the Agency bills as follows:

- 2 hours of this service for "Home Management"
- 2 hours of this service for "Personal Care"
- 1 hour of this service for "Nutrition"

When a Patient requires **Multiple Services**, the system captures a single Clock-In and Clock-Out (along with Duties) for the visit. The confirmation is applied to all back-to-back visits for that day, and duties are assigned to each visit based on logic covered in this section.

Duty Configuration

To schedule and confirm **Multiple Service** visits, the Plan of Care (POC) Duties must be configured. Complete the following steps to set up POC Duties.

Step			Action		
1	Navigate to A	dmin > Duty List Setu	0.		
2	Select an exis	Select an existing Duty List Setup or click the <i>New</i> button to create one.			
	Create or edit Duties of a specific nature under a single Duty Category . Duty Categories allow the system to assign entered Duties to the correct portion of a Multiple Service Visit .				
	Edit Duty General * C	List Configuration	Status: Active Office(s): Connecticu Save	1.102) chrome 50 (Doc Chron T t (All Offices);New York <u>Edit</u>	me 50) 5/17 10:24 History
	List of D	ıties			Add
	Duty Cod	le Duty Name	Duty Category -	Status	
3	104	Cleaning	Home Management	Active	đ
	105	Pet Care	Home Management	Active	đ
	109	Wash Floor	Home Management	Active	đ
	110	Laundry	Home Management	Active	đ
	108	Make Bed	Home Management	Active	đ
	122	Clean Fridge	Homemaker Chore	Active	ď
	711	Weight	Nutrition	Active	ď
	106	Skin Care	Personal Care	Active	<u> </u>
	100	Bathroom Assistance	Personal Care	Active	<u> </u>
	101	Grooming	Personal Care	Active	
	102	Cooking	Personal Care	Active	1
	Catagoria	ala Durba da la su sufa una	Duty Categories	*i-i*	
4	Categorize ea	ch buty to be perform	ed during a wuitiple Serv	vice visit.	



Step	Action
5	Click Save to finalize.

Contract Service Code

With **Multiple Service** Duties sorted, continue to setup **Service Codes** for each category. Complete the following steps to create or edit **Service Codes**.

Step		Action
1	Navigate to Admin > Reference Table Mana	nagement.
	In the Reference Table dropdown, select th Click the Add button to create a new Service	he <i>Contract Service Code</i> value in the Fiscal section. ce Code. To edit, click on the <u>Service Code</u> (hyperlink).
2	Reference Table Management Search Reference Table: Contract Service Code Search Service Code: Discipline: All	Enterprise 10.1.3.0 TEXWERDS (HSTE 10.0) IE 11 (Dec IE 10) 7/24 13:59 IE Legend Page Loaded in 0.372 second(s). Contract: All V Rate Type: All V
	Service Code Discipline Contract Rate Type Visit Ty Hild Standard HHA Caring Hands LLC Hourly Hourly N Hild Hilly HHA Heaven's Care Hourly Hourly Routine HHA Live: In HHA Heaven's Care Daily Routine	Search Add Page 1 of 28 host Last Type Mutual Allow potential probabiling Bitting Service Type ID Export Code Code Revenue Taxonomy HCPCSL ivec. Code Code In Code Code International for Export Non-Skilled No No 0001 XPR1234 Rev1234 TAX1234 Export International International Internatinternational Inte
	Reference Ta	able: Contract Service Code
	The <i>Contract Service Code</i> window opens. C isk). An Export Code is required to use this f	Complete the required fields (denoted with a red aster- function.
	Contract Service Code	
	* Contract:	t: Amazon Health
	* Discipline:	
	* Service Code:	e: Hourly
	* Visit Type:	e: Hourly Non-Skilled
	Mutual:	
2	[h.(A E.,chai.ge support usu on), j: Weekend (Heliday Coder	
5	Apply the Holiday Code to Weekday:	v: □ 0
	Code Configuration	
		Weekday Code Weekend/Holiday Code
	Export Code: Revenue Code:	
	Taxonomy Code:	e:
	HCPCS Code:	e:
	GL Code:	e:
		View/Edit Holidays Save Cancel
	Contract	t Service Code Window
4	Click the Save button to save the Service Co	ode.
_	Navigate to Admin > Search Contract and s	select the Contract authorizing the Multiple Service vis-
5	its.	





Step		Action	
	Click on the Billing Rates tab and then click the on the New Rate button.		
6	Contract Setup (Amazing Health) General Billing Bates Billing Rates Billing Collections Status: Active v From Date: 7/24/2018 Search Results (12) Discipling - Service Code HHA HIA Hely SS125 1.00 01/01/2018	Informer 10.1.2.0 Proceeded (All (10.0) 17.11 (All 10.0) 17.21 (All 10.0) 17.21 (All 10.0) 17.21 (All 10.21 (All 10.21 (All 10.0) 17.21 (All 10.21 (All 10.21 (All 10.0) 17.21 (All 10.21 (All 10	
	The <i>Contract Rate</i> window opens. Con	pplete the required fields (as denoted with red asterisks), as	
	illustrated in the following image. Ensu	ure to select the Service Codes to be used for scheduling	
	Multiple Service visits. Click Save.		
	Contract Rate		
		* Discipline: HHA * Service Code: HHA Hrly	
-		From Date: 08/01/2018 To Date: 08/01/2020 Till	
/		* Rate: 22.000000)\$	
	* Billing Hourly Ca	Units Per Hour: 4 p For Invoicing:	
	Min Visit I	Hours: Minutes: Human Annual Annua	
		Active: 🗹	
	With the Duty Cotogories and Contrac	Contract New Rate	
	code (specifically the Export Code rela	ted to the service code) and send the information to HHAX	
	in the following format:		
8	Duty Category	Map to Visits with Export Code	
	Home Management	HMGMNT123	
	Personal Care	PSNLCRE123	
	Nutrition	NUTRI123	
	Technical Support links or mans these	e values for the Agency	
9	Note: If an Agency fails to provide the corr	rect Export Codes , the mapping does not function correctly. Fur-	
	thermore, mapping only works for Multipl	e Service visits.	

Patient Configuration

Patient information needs to be properly configured to schedule **Multiple Service** visits. This involves designating the Patient as requiring **Multiple Service** visits, as well as setting up **Authorizations** that permit each unique service.



Service Type: Multiple Services

Complete the following steps to set up Multiple Services scheduling for a Patient.

Step	А	ction			
1	Navigate to the Patient's General page (<i>Patient</i>	> Search Patient > General).			
2	Select the <i>Edit</i> button.				
	Select the <i>Multiple Services</i> checkbox under the Service Type field (as illustrated below).				
	General	History			
	Nurse: Select V	* Coordinator: Megyn Kelly			
	Caregivers with Access to Patient Info via Mobile App:	Coordinator 2: Kenny Williams			
	EVV Required: 🗹 Change will take effect on the following day	Coordinator 3: Select			
3	Disable Automatic Visit Creation 🔲 🛈	Service Request Start Date: 06/01/2017			
	Enable FOB Confirmation:	Projected DC Date:			
	Service Type: V Multiple Services ()	Source Of Admission: Hospital			
	Cluster	Timesheet Required (Skilled):			
	Link with:	aryTimesheet Required (Non-Skilled):			
	└ Mutual with: └ Prim	ary Location: Select			
	Service Type:	Multiple Services			
	Click the Save button. Once saved, the system	confirms back-to-back visits with a single FVV			
4					
	Clock-IN and Clock-OUT.				

Authorizations

An **Authorization** should be setup for each unique service being provided in a **Multiple Service** visit. For example, an Authorization must be created for *Home Management, Personal Care*, and *Nutrition*. Complete the following steps to create or edit Authorizations.

Step	Action
1	Navigate to Patient > Patient Search and select the appropriate Patient.
2	Select <u>Authorizations/Orders</u> from the left navigation panel.
3	Click the Edit link to update an existing Authorization or click Add to create a new one.
4	The Authorization window appears. Complete all required fields, or any field marked by a red asterisk*. Enter a Service Code that is setup for Multiple Service visit.



Step	Action
	HHA Exchange - Patient Authorization
	Authorization ()
	Contract: Caring Hands LLC G Biscipline: HHA
	* Authorization Number: 123456789 Dervice Code: Home Management 🔻 🛈
	* From Date: 05/01/2016 07/31/2016
	Type: Hourly Max Units for Auth: 0.0 (in units. enter 0 for unlimited)
	Period: Daily 🔻 🛈
	Sun: Mon: 2.00 Tue: 2.00 Wed: 2.00 Thu: 2.00 Fri: 2.00 Sat:
	Document: 🛐 Note: File must be 1000 KB in size or smaller.
	Notes:
	Save Cancel
	New Authorization
E	Repeat this process until Authorizations have been generated for all Service Codes
5	tiple Service visits.

Scheduling and Confirmation

Complete the following steps to schedule **Multiple Service** Visits.

Step	Action			
1	Navigate to Patient > Patient Search and select the appropriate Patient.			
2	Select <u>Calendar</u> from the left navigation panel.			
2	Add a New non-skilled visit on the selected day. Complete all required fields (denoted with a red			
	asterisk*). Ensure to select the correct Service Code.			
	Repeat Step 3 until all back-to-back visits have been scheduled. Once complete, these appear in			
	a column on the Patient's Calendar (as illustrated on the image).			
	5:1000-1200			
4	S:1200-1400			
	B: N Anderson Rebecca			
	S:1400-1500 0 Mutrition			
	Anderson Rebecca			
	Back-to-Back Visits			
	When the Caregiver Clocks-IN for the first shift, the system automatically confirms all Start and			
	End times as set up, as follows:			
5	1. Caregiver Clocks-IN at 1000 ; system confirms 1200 End time for first service.			
	2. System confirms 1200 Start time and 1400 End Time for second service.			
	3. System confirms 1400 Start Time for third service; Caregiver Clocks OUT and enters			
	Duties at 1500.			



Step	Action
6	Duties are automatically applied to the correct visit when entered at the end of the third service.

Edit Services Page

The **Edit Services** page is used to review and manage **Multiple Service** visits. Complete the following steps to review information on the Edit Services page.

Step	Action						
1	Navigate to Action > Edit Services.						
	Select an Office , the Week Ending Date and either a Patient or Caregiver to perform a search.						
2	Edit Services * Office: Long Island City Patient: McBride Harriet (LIC-S6789,3:) Last Name, First Name, AdmissionID Caregiver: * Week Ending Date: [05/21/2016] Search						
	Edit Services > Search for Visits						
	The search results groups back-to-back visits as a single line item displaying visit details (as seen in the following image). From here, visits can be manually confirmed. Updated visits are high- lighted in orange.						
3	Edit Services Ciffice: Long Jaland City Contrast: All Visit Status: All Discipline: All Caregiver Discipline: Caregiver Discipline: Caregiver Discipline: Caregiver Discipline: Caregiver Discipline: Discipline: Discipline: Caregiver Discipline: Discipline: Caregiver Discipline: Care						
	Multiple Service Visit						
	i o create additional visits/services, click the Add button. An additional line appears with blank fields to complete.						
4	Inclusion do contributed: OS/15/2016 - 05/21/2016 NEXT WEEK NEXT WEEK Date Patient Confirmation Contract Service Code Timesheet 05/17/2016 / bcbrde, tarriet (LIC [LC-1003] 2 Anieson 1000 1200 05/17/2016 Confirmation Contract Service Code Timesheet 05/17/2016 / bcbrde, tarriet (LIC [LC-1003] 2 Anieson 1000 1200 05/17/2016 Caring Hands LLC Home Management Ri Ai If						
	Additional Visit/Service						
5	Click the Save button (either in line item) or at the bottom to save changes.						



Mutual Visits

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

The "Mutual with" **Service Type** involves servicing two Patients who have overlapping visits. The Patients receiving service must be linked prior to the visit for service to be scheduled. For example:

- Patient A is setup to receive Mutual service.
- Patient B is setup to receive **Mutual** service.
- Patients A and B are linked.
- Visits on Patient A and B's Calendar may be scheduled at the same time with the same Caregiver.

The setup and scheduling of **Mutual** visits, as well as the logic behind confirmation and Duty assignment is covered in this section.

Contract Service Code

Mutual visits can only be scheduled with **Service Codes** assigned for this **Service Type**. Complete the following steps to create or edit **Service Codes**.

Step	Action												
1	Naviga	gate to Admin > Reference Table Management .											
	Select Contract Service Code (under the Fiscal section) from the Reference Table field. Click the								Click the				
	Aaa bu	tton to ci	eate a	Service C	Lode.								
	R	eference Table Mar	agement					Enterpri	.1.1 TELXWEBO	rome/50.0.2667	?) chrome 50 (Doc	Chrome 50 10:	
		Search Reference Table:	Contract Serv	ice Code 🛛 🔻								Legend	
2	þ.	Search Results										Add	
		Service Code	Discipline	<u>Contract</u>	<u>Rate Type</u>	<u>Visit Type</u>	<u>Mutual</u>	Revenue Code	Export Code	HCPCS Code	Live-in Units A for Export P	1 <u>2 3</u> Illow vatient hift	
		HHA Standard HHA Hourly Reg	нна нна	Caring Hands LLC Heaven's Care	Hourly Hourly	Hourly Non-Skilled Hourly Non-Skilled	No No				N	0	
		HHA Live-In	HHA	Heaven's Care	Reference Table	e: Contract	Serv	ice Code			1 N	0	
	The Co	ntract Se	rvice C	ode wind	low opens. Co	mnlete	all re		iolds o	or any f	field ma	arked by a	_
3	red astorick* and coloct the Mutual checkboy. Click Save												
	i eu ast		a selec	i the Mut		. CIICK 3 0	ve.						



Step		Action				
		Contract Service Code				
	-	Contract Service Code Window				
4	Navigate to Admin > Searcl	h Contract and select the Contract authorizin	g the Mutual visits.			
5	Navigate to the <i>Billing Rates</i> section and click the New Rate button to open the <i>Contract Rate</i> window.					
6	be used for scheduling Mut	tual visits. Click <i>Save</i> .				
		* Billing Units Per Hour: 4 Hourly Cap For Invoicing: Hours: Minutes: Minu				

Patient Configuration

To schedule **Mutual visits**, Patient information must be properly configured. This involves designating Patients as requiring **Mutual visits**, linking two Patients together, defining a **Primary Patient**, and setting up **Authorizations**.

Service Type: Mutual with

Complete the following steps to designate a Patient as requiring **Mutual visits**.

Step	Action
1	Navigate to Patient > Patient Search and select the appropriate Patient.





Step	Action					
2	Select <u>General</u> from the left nav and click the <i>Edit</i> button.					
3	In the Service Type field, select the Mutual With value. Two Patients must be linked to save changes when selecting this option. Click the "?" link to the right of the field to search for the "mutual" Patient.					
4	Note: The system only allows two Patients for Mutual visits if they have the same phone number on record. Select the Primary checkbox to assign the Patient as the primary which allows the system to					
	recognize which Patient's Duties are being entered first when a Caregiver Clocks OUT.					
	Profiles (as seen in the following image).					
5	Patient Info - Active MUTUAL WITH - [HARRIS TYLER(Active)] Name: Guide David Admission ID: LIC-900064 Patient ID: Contract: Caring Hands LLC DOB: 03/01/1915 Primary Alt. Patient ID: Home Phone: 973-747-2712 Address: 47-12 39th Street, New York Coordinators: Jon Franqui Office: Long Island City Languages: City, NY, 11194					
	Mutual Patient Header Note: Click on the linked Patient's name to toggle between each of the Patients.					

Authorizations

Authorizations must be set up for each Patient in a mutual case. Complete the following steps to create or edit **Authorizations**.

Step	Action
1	Navigate to Patient > Patient Search and select the appropriate Patient.
2	Select <u>Authorizations/Orders</u> from the left navigation panel.
3	Click the <u>Edit</u> link or click the Add button to create a new one.
4	In the Patient Authorization window, complete the required fields (denoted with a red asterisk*).
	Ensure to enter a Service Code that is set up for Mutual Visit .



Step	Action
	HHA Exchange - Patient Authorization
	Authorization () History
	* Contract: Caring Hands LLC V (i) * Discipline: HHA V (i)
	* Authorization Number: 123444333
	* From Date: 05/01/2016 1 * To Date: 05/31/2017
	Type: Hourly Max Units for Auth: 0.00 (in units, enter 0 for unlimited)
	Period: Daily 🔻 🛈
	Sun: 0.00 Mon: 4.00 Tue: 4.00 Wed: 4.00 Thu: 4.00 Fri: 4.00 Sat: 0.00 ()
	Document: Note: File must be 1000 KB in size or smaller.
	Notes: (500 Character Limit)
	Save Cancel
	New Authorization
5	Complete this process for both Patients in the Mutual case.

Scheduling and Confirmation

Complete the following steps to schedule **Mutual Visits**.

Step	Action					
1	Navigate to Patient > Patient Search and select the Primary Patient.					
2	Select <u>Calendar</u> from the left navigation panel.					
3	Select a date and add a New non-skilled visit . Complete all required fields (denoted with red asterisk*). Ensure to select the correct Service Code . Click <i>Save</i> .					
4	Upon saving the visit, a warning " icon in the visit cell appears. This warning indicates that the other Patient in the mutual case (referred to as a "Secondary Patient") does not have a matching visit on their calendar.					
	Primary Patient Scheduled					
	Navigate to the Secondary Patient's Calendar and create a new visit to match the scheduling details of the Primary Patient. Once saved, the warning icon is removed from the Calendar.					



Step		Action
		S:1000-1200 T PM i B: N Abreu Alex T X Primary and Secondary Patient: Matching Schedules
5	The Car the EV Clockin 1.	regiver is only required to Clock-IN and Clock-OUT once for both visits. The system applies / to both visits if they are scheduled correctly. Duties are entered for both Patients when g OUT. For example: Caregiver Clocks IN at 1000 .
	2.	The system applies the EVV to the scheduled visit on both the Primary and Secondary Patient's Calendar .
	3.	Caregiver Clocks OUT at 1200. The Caregiver enters the Primary Patient's duties first, followed by 00 or 000 (depending on your Agencies IVR settings). The Caregiver then enters the Secondary Patient's duties, followed by 00 or 000.
	4.	The system applies the EVV and duties to the scheduled visit on both the Primary and Secondary Patient's Calendar .



Linked Visits

The "Linked with" **Service Type** involves servicing two Patients who have back-to-back visits. The Patients receiving service must be linked prior to the visit for service to be properly confirmed. For example:

- Patient A is setup to receive Linked service.
- Patient B is setup to receive Linked service.
- Patients A and B are linked.
- Visits on Patient A and B's Calendar may be scheduled back-to-back and confirmed using a single EVV Clock-IN and Clock-OUT.

The setup and scheduling of **Linked Visits**, as well as the logic behind confirmation and Duty assignment is covered in this section.

Patient Configuration

Patient information needs to be properly configured to schedule **Linked** visits. This involves designating Patients as requiring **Linked** visits, linking two Patients together, defining a **Primary** Patient, and setting up **Authorizations**.

Service Type: Linked with

Complete the following steps to designate a Patient requiring Linked Visits.





Step	Action						
	recognize which Patient's Duties are being entered first when a Caregiver Clocks OUT.						
	Once a successful link is made between two Patients, a header message displays in both Patient Profiles (as seen in the following image).						
5	Patient Info - Active LINK WITH - [MCBRIDE HARRIET(Active)] Name: Smith Louise Jane Admission ID: LIC-900004 Patient ID: Contract: Caring Hands LLC DOB: 03/14/1947 Primary Alt. Patient ID: Home Phone: 212-990-1010 Address: LONG ISLAND CITY, NY, (1101)						
	Linked Patient Header						
	Note: Click on the linked Patient's name to toggle between each of the Patients.						

Scheduling and Confirmation

Complete the following steps to schedule Linked Visits.

Step	Action						
1	Navigate to Patient > Patient Search and select the Primary Patient						
2	Select Calendar from the left pavigation panel						
2	Select <u>Calendar</u> from the left havigation panel.						
3	Select a date and add a New non-skilled visit . Complete all required fields (denoted with red asterisk*). Ensure to select the correct Service Code . Click <i>Save</i> .						
	Upon saving the visit, a warning " icon in the visit cell appears. This warning indicates that the other Patient in the mutual case (referred to as a "Secondary Patient") does not have a matching						
	visit on their calendar.						
	S:1400-1600 T LP (1) U: B: N Smith Jack T X						
-	Primary Patient Scheduled						
	Navigate to the Secondary Patient's Calendar and create a new visit to match the scheduling details of the Primary Patient. Once saved, the warning icon is removed from the Calendar.						
	S:1600-1800 T LS (i) V: B: N Smith Jack T X Primary and Secondary Patient: Matching Schedules						
_	The Caregiver is only required to Clock-IN and Clock-OUT once for both visits. The system applies						
5	the EVV to both visits if they are scheduled correctly. Duties are entered for both Patients when						



Step		Action
	Clockin	g OUT. For example:
	1.	Caregiver Clocks IN at 1400 for the first visit.
	2.	The system applies two confirmations at 1600 ; one to close the first visit for the Primary Patient, and a second to begin the second visit for the Secondary Patient.
	3.	Caregiver Clocks OUT at 1800. The Caregiver enters the Primary Patient's duties first, followed by 00 or 000 (depending on your Agencies IVR settings). The Caregiver then enters the Secondary Patient's duties, followed by 00 or 000.
	4.	The system applies the EVV to the second visit.
	5.	The Duties are sorted to the appropriate Patient/visit.



Live-in Visits

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

A "Live-in" visit is not a **Service Type**. **Live-in Visits** require a unique **Service Code**, **Billing Rate**, and **Authorization**. Confirmation for Live-in visits differ from normal visits if they are scheduled back-to-back.

Contract Service Code

Complete the following steps to create or edit Service Codes for Live-in visits.

Step	Action				
1	Navigate to Admin > Reference Table Management.				
	Select <i>Contract Service Code</i> (under the Fiscal category) from the Reference Table dropdown.				
2	Reference Table Management 10 Search 10 Reference Table: Contract Service Code Image: Search Results Image: Search Results Service Code Discipline Service Code Discipline Contract Rate Type Visit Typ: Visit Typ: Visit Typ: Visit Typ:				
3	Reference Table: Contract Service Code On the Contract Service Code window, complete the required fields (denoted with red asterisks). For Rate Type, Daily must be selected. Click Save. Contract Service Code * Discipline: HHA * Ontract Service Code * Discipline: HHA * Contract: Caring Hands LLC * Service Code: HHA Live-In * Service Code: Window				
4	Navigate to <i>Admin > Search Contract</i> and select the Contract authorizing the Live-in visits.				
5	Navigate to the Billing Rates section and click on the <i>New Rate</i> button to open the <i>Contract Rate</i> window. Complete all required fields (denoted with red asterisk*). Ensure to enter a Billing Units value of 1 and a Min Visit Hours for Daily value of 1300.				



Step			Action	
	Note: Live-in visits are bille tem bills the visit at a flat r visit scheduled for less thar Click Save .	d at a flat rate (requir ate instead of an hour a 13 hours is not billed	red). Once a visit has cros ly. Setting the Min Visit i at an hourly rate.	sed the 13-hour threshold, the sys- Hours For Daily to 1300 ensures a
		Contract Rate		History
		* Discipline:	ННА	
		* Service Code:	HHA Live-In 🔻	
		* From Date:	07/01/2016	
		* To Date:	0//31/2017	
		* Rate:	120.000000\$	
		* Billing Units: Hourly Cap For Invoicing:	1.00	
		Hours:	Minutes:	
		Min Visit Hours For Daily:	1300 (HHMM)	
		Active:		
			Save Cancel	
		Nev	<pre>/ Contract Rate</pre>	

Patient Configuration

Patient information must be properly configured to schedule **Live-in Visits** which involves setting up **Authorizations** that permit the Live-In specific **Service Code**.

Authorizations

An **Authorization** must be setup for service provided in a **Live-In Visit**. Complete the following steps to create or edit an **Authorization**.

Step	Action
1	Navigate to Patient > Patient Search and select the applicable Patient.
2	Select <u>Authorizations/Orders</u> from the left navigation panel.
3	Click the <u>Edit</u> link or click the Add button to create a new one.
4	In the <i>Patient Authorization</i> window, complete the required fields (denoted with a red asterisk*). Ensure to enter a Service Code that is set up for Live-In Visit . Select <i>Daily</i> for the Period and set each day the Patient receives service to <i>24</i> .



Step	Action	
	HHA Exchange - Patient Authorization	
	Authorization (i)	
	* Contract: Caring Hands LLC V () * Discipline: HHA V ()	
	* Authorization Number: 123456789 0 Service Code: HHA Live-In 🔻 🛈	
	* From Date: 07/01/2016 📰 🛈 * To Date: 07/25/2017 📰	
	Type: Daily Max Units for Auth: 0.0 (in units. enter 0 for unlimited)	
	Period: Daily V 3	
	Sun:Mon: 24.00 Tue: 24.00 Wed: 24.00 Thu: 24.00 Fri: 24.00 Sat: ()	
	Document:	
	Notes:	
	Save Cancel	
	New Authorization	
5	Click Save .	

Scheduling and Confirmation

Complete the following steps to schedule Live-in Visits.

Step	Action
1	Navigate to Patient > Patient Search and select the applicable Patient.
2	Select <u>Calendar</u> from the left navigation panel.
3	Select a date and add a New non-skilled visit . Complete all required fields (denoted with red asterisk*). Ensure to select the correct Service Code . For Live-in Visits , ensure to schedule the hours from <i>0800-0800</i> to indicate a 24-hour shift. Click <i>Save</i> .
	Live-in Visits are confirmed with a single Clock IN and Clock OUT if they are not scheduled back-
	to-back with another Live-in visit.
4	S:0800-0800 V: B: N Smith Jack
	If scheduled back-to-back, the process is as follows:
	1. The Caregiver Clocks IN at 0800 for the first visit.
5	2. The Caregiver Clocks OUT at 0800 the following day and enters Duties.
	 The system automatically Clocks IN the Caregiver for the next visit at 0800 if they are scheduled to work it.



Step	Action
	4. The Caregiver need only Clock OUT and enter Duties for each subsequent visit. The sys-
	tem automatically clocks them IN once the Clock OUT EVV is received.
	Note: This automated process only works if the Caregiver Clocks OUT within 30 minutes of the scheduled
	end time, or by 0830 .

Pre- and Post-Shifts

The **Pre-Shift** and **Post-Shift** functions allows one to make schedule changes by inserting partial shifts before or after a **Live-in** visit. These shifts are typically scheduled when a Caregiver must arrive and relieve the previous Caregiver before the normal transition time, or when a Caregiver must stay later than the original transition time if their replacement cannot arrive on time.

Complete the following to enter a **Pre-Shift** or **Post-Shift**.





Step			Action		
		Create Post-Shift			
		* Schedule T	Fime: 0600 - 0800 H:	M:	
		* Primary bi	II to: Caring Hands LLC	T	
		* Service C	Code: Non-Billable	¥	
		* Caregiver Co	ode: LIC-1003	?	
			Anderson Rebecca 100003		
	-	* Pay C	Code: HHA Base	•]
	At	tter saving, a new shift will be he original shift will have its Sc	created with the information e	entered here. accommodate for the new Post-	-Shift,
	-		Sa ve Close		
			Create a Post-Shi	ft	
	On the Calendar pag	the added Post	-Shift annears in	Pink Note that the	Schedule Time for the
	previous Live-in visit	has been adjuste	d in accordance v	with the Schedule 1	Time of the Post-Shift.
	S:08	00-0600 T i	S:0600-0800 T	i) S:0800-0800	13 (i)
_	<u>V:</u> <u>B:</u> N		<u>V:</u> <u>B:</u> N	<u>►</u> B: N	
5	Davis	<u>s Julia</u>	Anderson Rebecca	Davis Julia	X
		U	V: B: N		U
			Davis Julia	X	
				1	
			Post-Shift Schedul	ed	
6	Correct the Post-Shif	ft to pass Prebillin	g and Billing Revie	ew exception page	s. Navigate to Admin >
Ŭ	Reference Table Ma	nagement and se	lect the non-billa	ble Service Code.	
	On the Contract Serv	/ice Code page, se	lect the Bypass P	rebilling Validation	ns and Bypass Billing
	Review Validations	checkboxes.			
7	Click Sava				
	CIICK Save.				
	Visits scheduled with	the Non-Billable	Service Code byp	bass all validations	on the Prebilling and
	Billing Review excep	tion pages.			-



Step		Action
	Contract Service Code	
	* Discipline	e: PCA 🔻 🚺
	* Contract	t: Caring Hands LLC 🔻 🚺
	* Service Code	e: Non-Billable
	* Rate Type	e: Daily 🔻 i
	* Visit Type	e: Hourly Non-Skilled 🔻 i
	Mutual	I: 🔲 🛈
	Allow Patient Shift Overlap	»: 🔲 🚺
	Bypass Prebilling Validations	s: 🗹 🚺
	Bypass Billing Review Validations	s: 🗹 🚺
	Export Code	
		e: (e xxx
	Live-in Units for Expor [HHA Exchange support use only]	rt 1
		Save Cancel
	Bypass Prebilling	/Billing Review Validations
	The Post-Shift now displays in white in the Pa	atient's Calendar and may be included in an invoice
	(as seen in the image below).	
	14	<u>12</u> <u>13</u>
	S:0800-0600 T (1) S:0600-0	0800 T (i) \$:0800-0800 (i)
•	B: N (22:00)	🕞 📅 N
8	Davis Julia 🛛 🚺 Andersor	n Rebecca 🗙 Davis Julia 🗙
	i S:0800-	0800 (i) (i)
	V: B: N (24	.00)
	Davis Jul	
	Billa	able Post-Shift

Alternatively, an Authorization can be created specifically for the *Non-Billable* Service Code, as follows:

Step	Action
1	Navigate to Patient > Patient Search and select the applicable Patient.
2	Select <u>Authorizations/Orders</u> from the left navigation panel.
2	Either click the Edit link to update an existing Authorization or click the Add button to create a
5	new one.
л	The Authorization window opens. Complete/Update required fields (denoted by red asterisk).
4	Select <i>Non-Billable</i> from the Service Code field. Click <i>Save</i> .





Step			Action			
	Authorization	(i)				
		* Contract: Caring Hands	LLC V	* Discipline: PCA 🔻 🛈		
	* Author	ization Number: 12355313	()	Service Code: Non-Billable 🔻 🛈		
		* From Date: 07/01/2016	i	* To Date: 07/31/2017		
		Type: Daily	M	ax Units for Auth: 0.0 (in units. enter 0 for	unlimited)	
		Period: Daily	▼ (j)			
		Sun: 5.00 Mon:	5.00 Tue: 5.00 Wed: 5.00 Thu:	5.00 Fri: 5.00 Sat: 5.00 (i)		
		Document: 🔯 Note: File mus	t be 1000 KB in size or smaller.			
		Notes:	r Limit)			
		(Save Cancel			
		New Authorization				
	The Post-Shift now displays in green in the Patient's Calendar as an authorized visit.					
		11		12	13	
	S:0800-0 V:0800-0	0600 T	S:0600-0800 T	i S:0800-0800	í	
	<u>B:</u> N (22)	00)	B: N	<u>B:</u> N		
5	Davis Juli	a 🚺	Anderson Rebecca			
		U	<u>V:0800-0800</u>			
			<u>B:</u> N <u>(24:00)</u> Davis Julia	X		
				í		
	Authorized Post Visit					