



# Service Types Process Guide

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

# Contents

---

<b>Service Types</b> .....	<b>1</b>
Overview .....	1
HHAX System Key Terms and Definitions .....	1
<b>Multiple Service Visits</b> .....	<b>2</b>
Duty Configuration .....	2
Contract Service Code .....	3
Patient Configuration .....	4
Service Type: Multiple Services .....	5
Authorizations .....	5
Scheduling and Confirmation .....	6
Edit Services Page .....	7
<b>Mutual Visits</b> .....	<b>8</b>
Contract Service Code .....	8
Patient Configuration .....	9
Service Type: Mutual with .....	9
Authorizations .....	10
Scheduling and Confirmation .....	11
<b>Linked Visits</b> .....	<b>13</b>
Patient Configuration .....	13
Service Type: Linked with .....	13
Scheduling and Confirmation .....	14
<b>Live-in Visits</b> .....	<b>16</b>
Contract Service Code .....	16
Patient Configuration .....	17
Authorizations .....	17
Scheduling and Confirmation .....	18
Pre- and Post-Shifts .....	19

# 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
<b>Multiple Services</b>	A visit that consists of several different billable services, each of which requires a unique Service Code.
<b>Mutual with</b>	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.
<b>Linked with</b>	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.
<b>Live-in</b>	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 [HHAExchange Customer Support](#).

## HHAX System Key Terms and Definitions

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

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

# 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**.

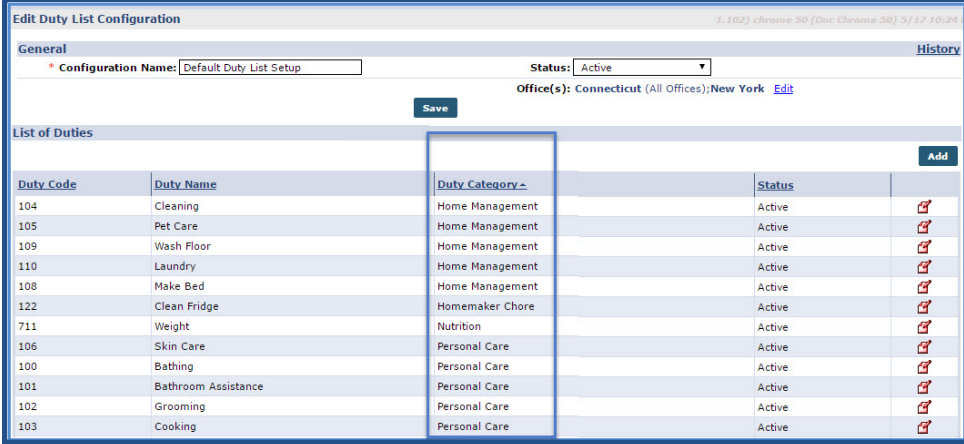
For example, an Agency sends **Caregiver A** to **Patient B** from 08:00 to 13:00. In that visit, the Agency bills as follows:

- 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

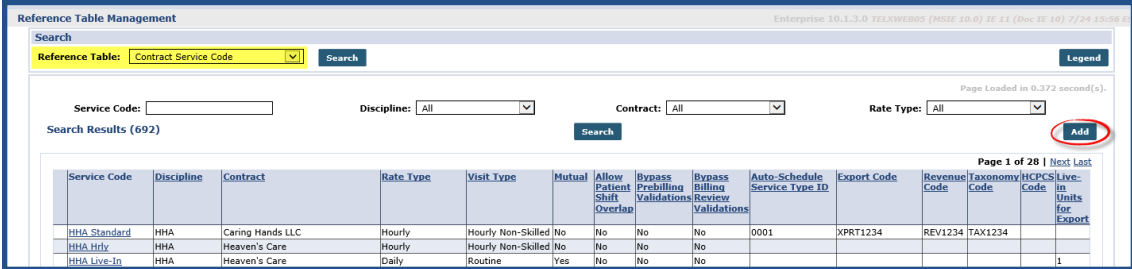
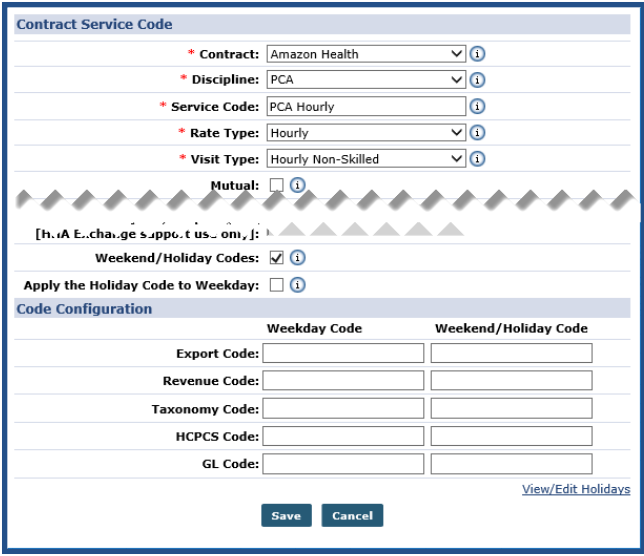
To schedule and confirm **Multiple Service** visits, the Plan of Care (POC) Duties must be configured. Complete the following steps to set up POC Duties.

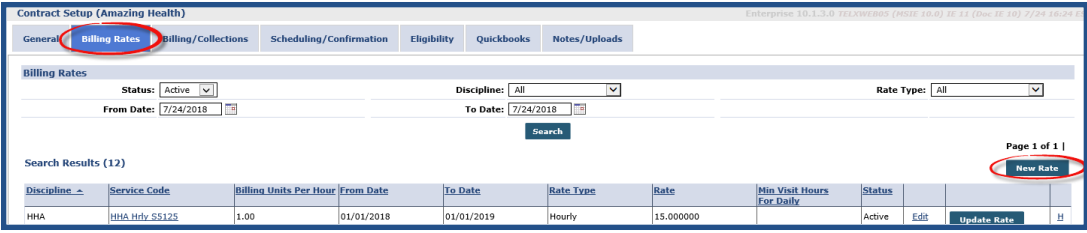
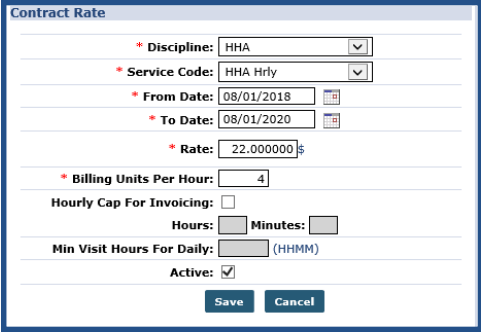
Step	Action																																																																	
1	Navigate to <b>Admin &gt; Duty List Setup</b> .																																																																	
2	Select an existing <b>Duty List Setup</b> or click the <b>New</b> button to create one.																																																																	
3	<p>Create or edit Duties of a specific nature under a single <b>Duty Category</b>. <b>Duty Categories</b> allow the system to assign entered Duties to the correct portion of a <b>Multiple Service Visit</b>.</p>  <table border="1"> <thead> <tr> <th>Duty Code</th> <th>Duty Name</th> <th>Duty Category</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr><td>104</td><td>Cleaning</td><td>Home Management</td><td>Active</td><td></td></tr> <tr><td>105</td><td>Pet Care</td><td>Home Management</td><td>Active</td><td></td></tr> <tr><td>109</td><td>Wash Floor</td><td>Home Management</td><td>Active</td><td></td></tr> <tr><td>110</td><td>Laundry</td><td>Home Management</td><td>Active</td><td></td></tr> <tr><td>108</td><td>Make Bed</td><td>Home Management</td><td>Active</td><td></td></tr> <tr><td>122</td><td>Clean Fridge</td><td>Homemaker Chore</td><td>Active</td><td></td></tr> <tr><td>711</td><td>Weight</td><td>Nutrition</td><td>Active</td><td></td></tr> <tr><td>106</td><td>Skin Care</td><td>Personal Care</td><td>Active</td><td></td></tr> <tr><td>100</td><td>Bathing</td><td>Personal Care</td><td>Active</td><td></td></tr> <tr><td>101</td><td>Bathroom Assistance</td><td>Personal Care</td><td>Active</td><td></td></tr> <tr><td>102</td><td>Grooming</td><td>Personal Care</td><td>Active</td><td></td></tr> <tr><td>103</td><td>Cooking</td><td>Personal Care</td><td>Active</td><td></td></tr> </tbody> </table> <p style="text-align: center;"><b>Duty Categories</b></p>	Duty Code	Duty Name	Duty Category	Status		104	Cleaning	Home Management	Active		105	Pet Care	Home Management	Active		109	Wash Floor	Home Management	Active		110	Laundry	Home Management	Active		108	Make Bed	Home Management	Active		122	Clean Fridge	Homemaker Chore	Active		711	Weight	Nutrition	Active		106	Skin Care	Personal Care	Active		100	Bathing	Personal Care	Active		101	Bathroom Assistance	Personal Care	Active		102	Grooming	Personal Care	Active		103	Cooking	Personal Care	Active	
Duty Code	Duty Name	Duty Category	Status																																																															
104	Cleaning	Home Management	Active																																																															
105	Pet Care	Home Management	Active																																																															
109	Wash Floor	Home Management	Active																																																															
110	Laundry	Home Management	Active																																																															
108	Make Bed	Home Management	Active																																																															
122	Clean Fridge	Homemaker Chore	Active																																																															
711	Weight	Nutrition	Active																																																															
106	Skin Care	Personal Care	Active																																																															
100	Bathing	Personal Care	Active																																																															
101	Bathroom Assistance	Personal Care	Active																																																															
102	Grooming	Personal Care	Active																																																															
103	Cooking	Personal Care	Active																																																															
4	Categorize each Duty to be performed during a <b>Multiple Service</b> visit.																																																																	

Step	Action
5	Click <b>Save</b> 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 <b>Admin &gt; Reference Table Management</b> .
2	<p>In the <b>Reference Table</b> dropdown, select the <i>Contract Service Code</i> value in the Fiscal section. Click the <b>Add</b> button to create a new Service Code. To edit, click on the <a href="#">Service Code</a> (hyperlink).</p>  <p style="text-align: center;"><b>Reference Table: Contract Service Code</b></p>
3	<p>The <i>Contract Service Code</i> window opens. Complete the required fields (denoted with a red asterisk). An <b>Export Code</b> is required to use this function.</p>  <p style="text-align: center;"><b>Contract Service Code Window</b></p>
4	Click the <b>Save</b> button to save the Service Code.
5	Navigate to <b>Admin &gt; Search Contract</b> and select the Contract authorizing the <b>Multiple Service</b> visits.

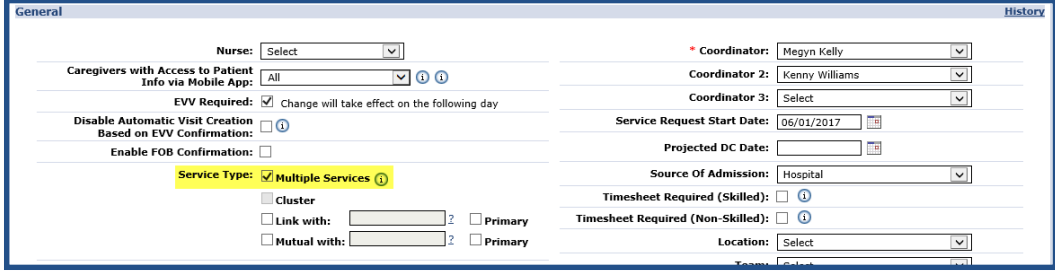
Step	Action								
6	<p>Click on the <b>Billing Rates</b> tab and then click the on the <b>New Rate</b> button.</p>  <p style="text-align: center;"><b>Adding a New Rate</b></p>								
7	<p>The <i>Contract Rate</i> window opens. Complete the required fields (as denoted with red asterisks), as illustrated in the following image. Ensure to select the <b>Service Codes</b> to be used for scheduling <b>Multiple Service</b> visits. Click <b>Save</b>.</p>  <p style="text-align: center;"><b>Contract New Rate</b></p>								
8	<p>With the <b>Duty Categories</b> and <b>Contract Service Codes</b> complete, pair each category with a service code (specifically the <b>Export Code</b> related to the service code) and send the information to HHAX in the following format:</p> <table border="1" data-bbox="267 1283 1422 1459"> <thead> <tr> <th data-bbox="267 1283 716 1329">Duty Category</th> <th data-bbox="716 1283 1422 1329">Map to Visits with Export Code</th> </tr> </thead> <tbody> <tr> <td data-bbox="267 1329 716 1371">Home Management</td> <td data-bbox="716 1329 1422 1371">HMGMENT123</td> </tr> <tr> <td data-bbox="267 1371 716 1413">Personal Care</td> <td data-bbox="716 1371 1422 1413">PSNLCRE123</td> </tr> <tr> <td data-bbox="267 1413 716 1455">Nutrition</td> <td data-bbox="716 1413 1422 1455">NUTRI123</td> </tr> </tbody> </table>	Duty Category	Map to Visits with Export Code	Home Management	HMGMENT123	Personal Care	PSNLCRE123	Nutrition	NUTRI123
Duty Category	Map to Visits with Export Code								
Home Management	HMGMENT123								
Personal Care	PSNLCRE123								
Nutrition	NUTRI123								
9	<p>Technical Support links, or maps, these values for the Agency.  <b>Note:</b> If an Agency fails to provide the correct <b>Export Codes</b>, the mapping does not function correctly. Furthermore, mapping only works for <b>Multiple Service</b> visits.</p>								

## 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

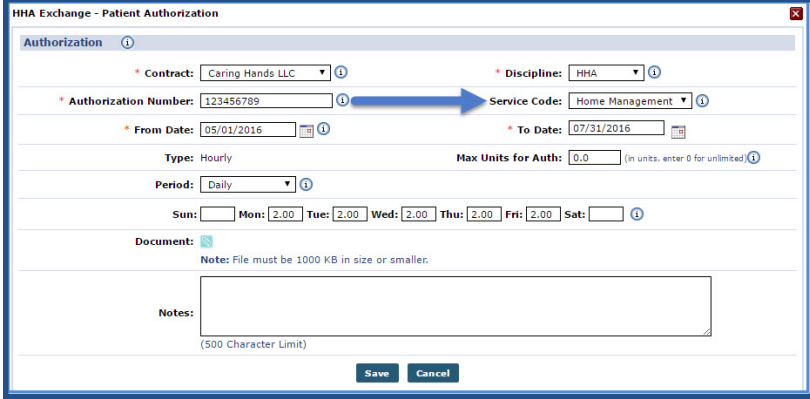
Complete the following steps to set up Multiple Services scheduling for a Patient.

Step	Action
1	Navigate to the Patient's <b>General</b> page ( <i>Patient &gt; Search Patient &gt; General</i> ).
2	Select the <b>Edit</b> button.
3	Select the <b>Multiple Services</b> checkbox under the <b>Service Type</b> field (as illustrated below). <div style="text-align: center;">  </div> <p style="text-align: center;"><b>Service Type: Multiple Services</b></p>
4	Click the <b>Save</b> button. Once saved, the system confirms back-to-back visits with a single EVV 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 <b>Patient &gt; Patient Search</b> and select the appropriate Patient.
2	Select <b>Authorizations/Orders</b> from the left navigation panel.
3	Click the <b>Edit</b> link to update an existing Authorization or click <b>Add</b> to create a new one.
4	The Authorization window appears. Complete all required fields, or any field marked by a red asterisk*. Enter a <b>Service Code</b> that is setup for <b>Multiple Service</b> visit.

Step	Action
	 <p style="text-align: center;"><b>New Authorization</b></p>
5	Repeat this process until <b>Authorizations</b> have been generated for all <b>Service Codes</b> setup for <b>Multiple Service</b> visits.

## Scheduling and Confirmation

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

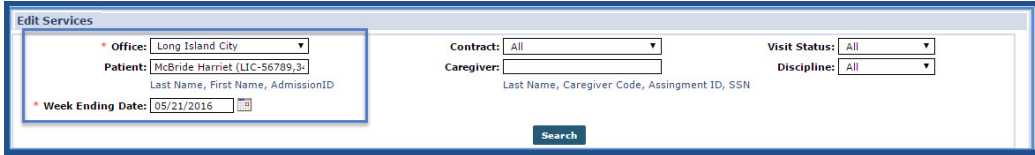
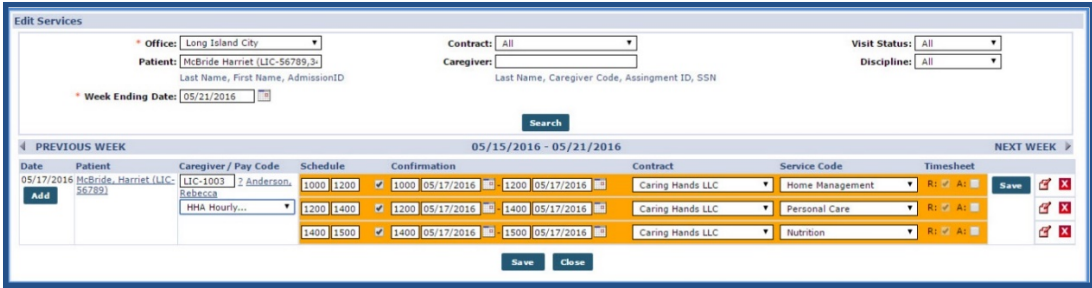
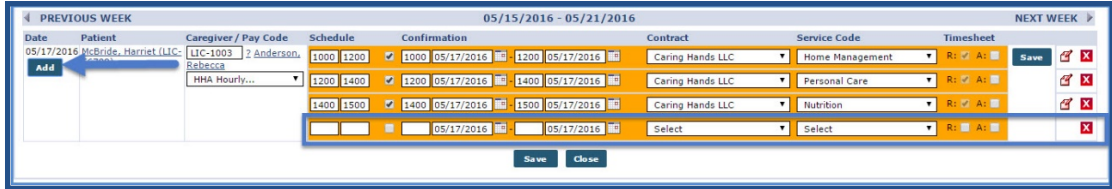
Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the appropriate Patient.
2	Select <b>Calendar</b> from the left navigation panel.
3	Add a <b>New non-skilled visit</b> on the selected day. Complete all required fields (denoted with a red asterisk*). Ensure to select the correct <b>Service Code</b> .
4	<p>Repeat <b>Step 3</b> until all back-to-back visits have been scheduled. Once complete, these appear in a column on the Patient's <b>Calendar</b> (as illustrated on the image).</p>  <p style="text-align: center;"><b>Back-to-Back Visits</b></p>
5	<p>When the Caregiver Clocks-IN for the first shift, the system automatically confirms all Start and End times as set up, as follows:</p> <ol style="list-style-type: none"> <li>Caregiver Clocks-IN at <b>1000</b>; system confirms <b>1200</b> End time for first service.</li> <li>System confirms <b>1200</b> Start time and <b>1400</b> End Time for second service.</li> <li>System confirms <b>1400</b> Start Time for third service; Caregiver Clocks OUT and enters Duties at <b>1500</b>.</li> </ol>



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 <b>Action &gt; Edit Services</b> .
2	<p>Select an <b>Office</b>, the <b>Week Ending Date</b> and either a <b>Patient</b> or <b>Caregiver</b> to perform a search.</p>  <p style="text-align: center;"><b>Edit Services &gt; Search for Visits</b></p>
3	<p>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 highlighted in orange.</p>  <p style="text-align: center;"><b>Multiple Service Visit</b></p>
4	<p>To create additional visits/services, click the <b>Add</b> button. An additional line appears with blank fields to complete.</p>  <p style="text-align: center;"><b>Additional Visit/Service</b></p>
5	Click the <b>Save</b> 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.

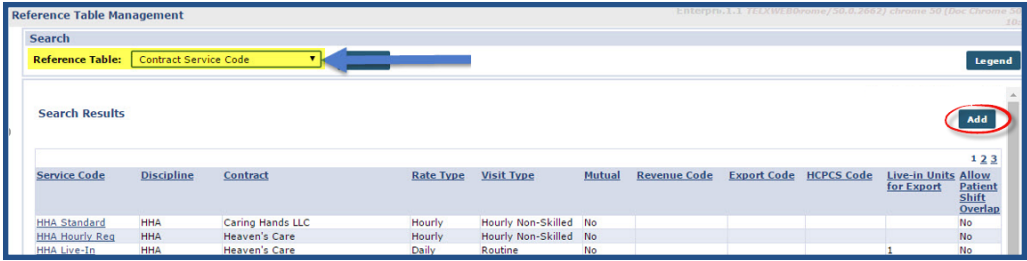
The “Mutual with” **Service Type** involves servicing two Patients who have overlapping visits. The Patients receiving service must be linked prior to the visit for service to be scheduled. For example:

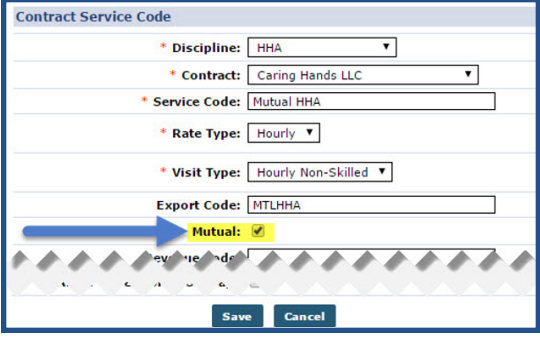
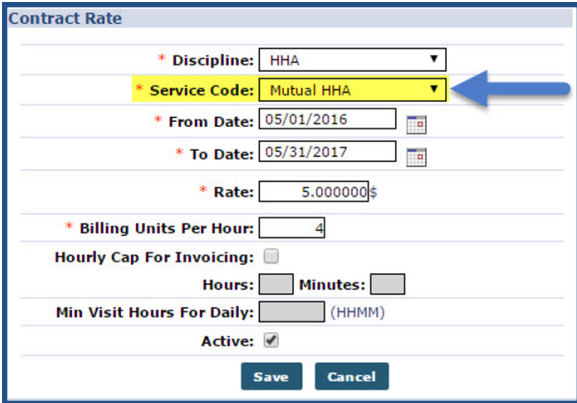
- Patient A is setup to receive **Mutual** service.
- Patient B is setup to receive **Mutual** service.
- Patients A and B are linked.
- Visits on Patient A and B’s Calendar may be scheduled at the same time with the same Caregiver.

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	Navigate to <b>Admin &gt; Reference Table Management</b> .
2	<p>Select <b>Contract Service Code</b> (under the Fiscal section) from the Reference Table field. Click the <b>Add</b> button to create a Service Code.</p>  <p style="text-align: center;"><b>Reference Table: Contract Service Code</b></p>
3	The <b>Contract Service Code</b> window opens. Complete all required fields, or any field marked by a red asterisk* and select the <b>Mutual</b> checkbox. Click <b>Save</b> .

Step	Action
	 <p style="text-align: center;"><b>Contract Service Code Window</b></p>
4	Navigate to <b>Admin &gt; Search Contract</b> and select the Contract authorizing the <b>Mutual</b> visits.
5	Navigate to the <b>Billing Rates</b> section and click the <b>New Rate</b> button to open the <b>Contract Rate</b> window.
6	<p>Complete all required fields (denoted by a red asterisk*). Select the applicable <b>Service Code(s)</b> to be used for scheduling <b>Mutual</b> visits. Click <b>Save</b>.</p>  <p style="text-align: center;"><b>New Contract Rate</b></p>

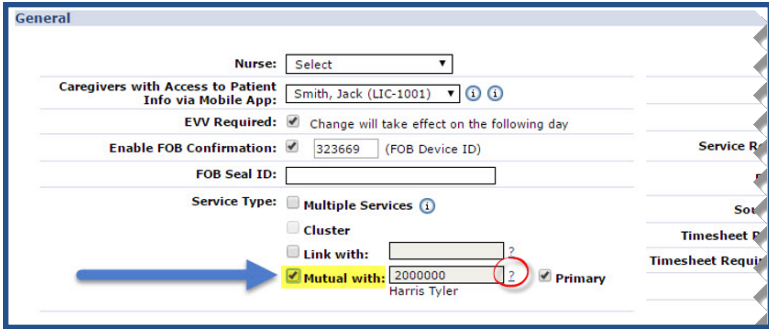
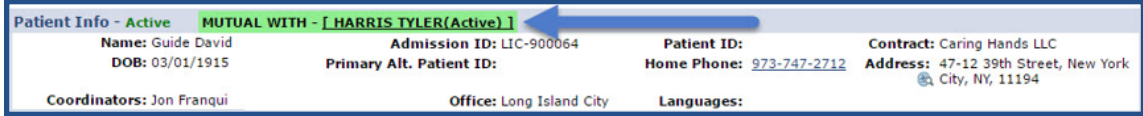
## Patient Configuration

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**.

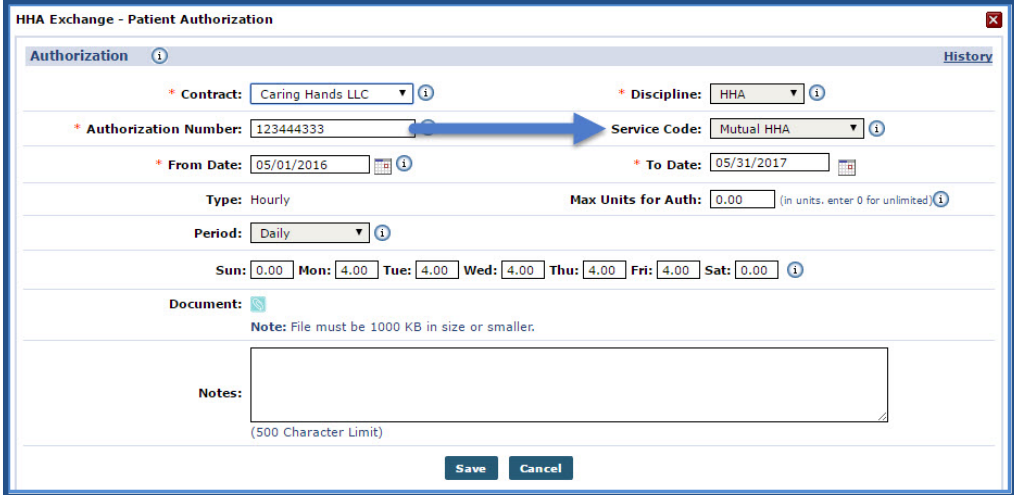
Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the appropriate Patient.

Step	Action
2	Select <u>General</u> from the left nav and click the <b>Edit</b> button.
3	<p>In the <b>Service Type</b> field, select the <i>Mutual With</i> 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.</p>  <p style="text-align: center;"><b>Service Type: Mutual With</b></p> <p><b>Note:</b> The system only allows two Patients for <b>Mutual visits</b> if they have the same phone number on record.</p>
4	Select the <b>Primary</b> 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.
5	<p>Once a successful link is made between two Patients, a header message displays in both Patient Profiles (as seen in the following image).</p>  <p style="text-align: center;"><b>Mutual Patient Header</b></p> <p><b>Note:</b> Click on the linked Patient’s name to toggle between each of the Patients.</p>

## Authorizations


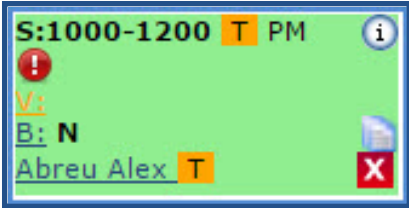
**Authorizations** must be set up for each Patient in a mutual case. Complete the following steps to create or edit **Authorizations**.

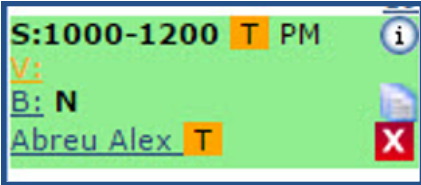
Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the appropriate Patient.
2	Select <u>Authorizations/Orders</u> from the left navigation panel.
3	Click the <u>Edit</u> link or click the <b>Add</b> button to create a new one.
4	In the Patient Authorization window, complete the required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

Step	Action
	 <p style="text-align: center;"><b>New Authorization</b></p>
5	Complete this process for both Patients in the <b>Mutual</b> case.

## Scheduling and Confirmation

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

Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the <b>Primary</b> Patient.
2	Select <u>Calendar</u> from the left navigation panel.
3	Select a date and add a <b>New non-skilled visit</b> . Complete all required fields (denoted with red asterisk*). Ensure to select the correct <b>Service Code</b> . Click <b>Save</b> .
4	<p>Upon saving the visit, a warning “  <p><b>Primary Patient Scheduled</b></p> </p>

Step	Action
	 <p style="text-align: center;"><b>Primary and Secondary Patient: Matching Schedules</b></p>
5	<p>The Caregiver is only required to Clock-IN and Clock-OUT once for <b>both</b> visits. The system applies the EVV to both visits if they are scheduled correctly. Duties are entered for both Patients when Clocking OUT. For example:</p> <ol style="list-style-type: none"> <li>1. Caregiver Clocks IN at <b>1000</b>.</li> <li>2. The system applies the EVV to the scheduled visit on both the Primary and Secondary Patient's <b>Calendar</b>.</li> <li>3. Caregiver Clocks OUT at <b>1200</b>. The Caregiver enters the Primary Patient's duties first, followed by <b>00</b> or <b>000</b> (depending on your Agencies IVR settings). The Caregiver then enters the Secondary Patient's duties, followed by <b>00</b> or <b>000</b>.</li> <li>4. The system applies the EVV and duties to the scheduled visit on both the Primary and Secondary Patient's <b>Calendar</b>.</li> </ol>

## 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.

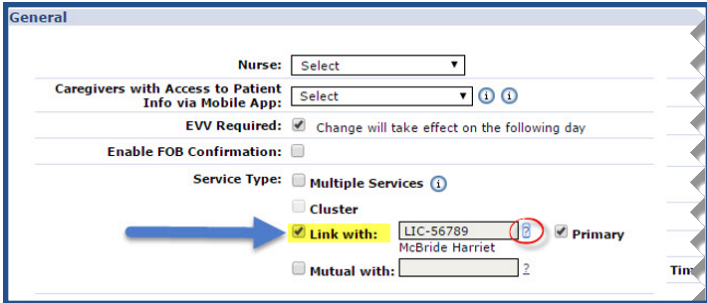
The setup and scheduling of **Linked Visits**, as well as the logic behind confirmation and Duty assignment is covered in this section.

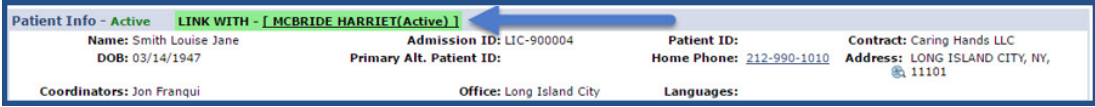
## Patient Configuration

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

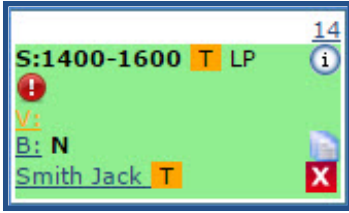
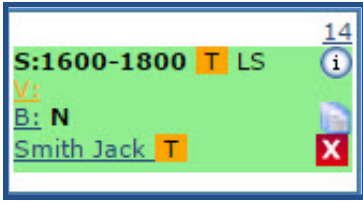
Complete the following steps to designate a Patient requiring **Linked Visits**.

Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the applicable Patient.
2	Select <b>General</b> from the left navigation panel and click the <b>Edit</b> button.
3	<p>In the <b>Service Type</b> field select <b>Link with</b>. 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 “linked” Patient.</p>  <p style="text-align: center;"><b>Service Type: Linked With</b></p> <p><b>Note:</b> The system only allows two Patients for <b>Linked Visits</b> if they have the same phone number on record.</p>
4	Select the <b>Primary</b> checkbox to assign the Patient as the primary which allows the system to

Step	Action
	recognize which Patient's Duties are being entered first when a Caregiver Clocks OUT.
5	<p>Once a successful link is made between two Patients, a header message displays in both Patient Profiles (as seen in the following image).</p>  <p style="text-align: center;"><b>Linked Patient Header</b></p> <p><i>Note: Click on the linked Patient's name to toggle between each of the Patients.</i></p>

## Scheduling and Confirmation

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

Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the <b>Primary</b> Patient.
2	Select <b>Calendar</b> from the left navigation panel.
3	Select a date and add a <b>New non-skilled visit</b> . Complete all required fields (denoted with red asterisk*). Ensure to select the correct <b>Service Code</b> . Click <b>Save</b> .
4	<p>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.</p>  <p style="text-align: center;"><b>Primary Patient Scheduled</b></p> <p>Navigate to the Secondary Patient's <b>Calendar</b> and create a new visit to match the scheduling details of the Primary Patient. Once saved, the warning icon is removed from the Calendar.</p>  <p style="text-align: center;"><b>Primary and Secondary Patient: Matching Schedules</b></p>
5	The Caregiver is only required to Clock-IN and Clock-OUT once for <b>both</b> visits. The system applies the EVV to both visits if they are scheduled correctly. Duties are entered for both Patients when



Step	Action
	<p>Clocking OUT. For example:</p> <ol style="list-style-type: none"><li data-bbox="326 348 894 380">1. Caregiver Clocks IN at <b>1400</b> for the first visit.</li><li data-bbox="326 394 1419 464">2. The system applies two confirmations at <b>1600</b>; one to close the first visit for the Primary Patient, and a second to begin the second visit for the Secondary Patient.</li><li data-bbox="326 478 1425 590">3. Caregiver Clocks OUT at <b>1800</b>. The Caregiver enters the Primary Patient's duties first, followed by <b>00</b> or <b>000</b> (depending on your Agencies IVR settings). The Caregiver then enters the Secondary Patient's duties, followed by <b>00</b> or <b>000</b>.</li><li data-bbox="326 604 927 636">4. The system applies the EVV to the second visit.</li><li data-bbox="326 651 1008 678">5. The Duties are sorted to the appropriate Patient/visit.</li></ol>

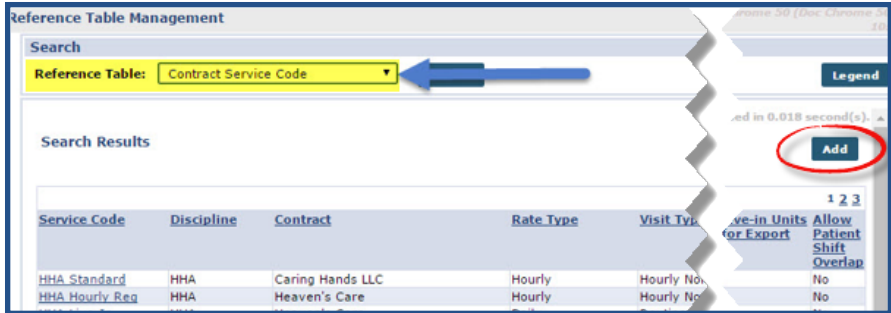
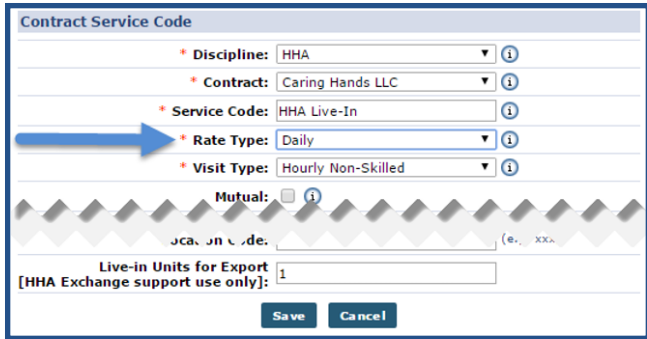
# Live-in Visits

**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 <b>Admin &gt; Reference Table Management</b> .
2	<p>Select <b>Contract Service Code</b> (under the Fiscal category) from the <b>Reference Table</b> dropdown. Click the <b>Add</b> button to open the <b>Contract Service Code</b> window.</p>  <p style="text-align: center;"><b>Reference Table: Contract Service Code</b></p>
3	<p>On the <b>Contract Service Code</b> window, complete the required fields (denoted with red asterisks). For <b>Rate Type</b>, <b>Daily</b> must be selected. Click <b>Save</b>.</p>  <p style="text-align: center;"><b>Contract Service Code Window</b></p>
4	Navigate to <b>Admin &gt; Search Contract</b> and select the Contract authorizing the <b>Live-in</b> visits.
5	Navigate to the <b>Billing Rates</b> section and click on the <b>New Rate</b> button to open the <b>Contract Rate</b> window. Complete all required fields (denoted with red asterisk*). Ensure to enter a <b>Billing Units</b> value of <b>1</b> and a <b>Min Visit Hours for Daily</b> value of <b>1300</b> .

Step	Action
	<p><b>Note:</b> <i>Live-in</i> visits are billed at a flat rate (required). Once a visit has crossed the 13-hour threshold, the system bills the visit at a flat rate instead of an hourly. Setting the <b>Min Visit Hours For Daily</b> to 1300 ensures a visit scheduled for less than 13 hours is not billed at an hourly rate.</p> <p>Click <b>Save</b>.</p> <div data-bbox="558 527 1135 919" style="border: 1px solid #0056b3; padding: 5px; margin: 10px auto; width: 80%;"> <p style="text-align: right; margin: 0;"><a href="#">History</a></p> <p>* Discipline: <input type="text" value="HHA"/></p> <p>* Service Code: <input type="text" value="HHA Live-In"/></p> <p>* From Date: <input type="text" value="07/01/2016"/></p> <p>* To Date: <input type="text" value="07/31/2017"/></p> <p>* Rate: <input type="text" value="120.000000\$"/></p> <p>* Billing Units: <input type="text" value="1.00"/></p> <p>Hourly Cap For Invoicing: <input type="checkbox"/></p> <p>Hours: <input type="text"/> Minutes: <input type="text"/></p> <p>Min Visit Hours For Daily: <input type="text" value="1300"/> (HHMM)</p> <p>Active: <input checked="" type="checkbox"/></p> <p style="text-align: center;"><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p style="text-align: center; margin-top: 10px;"><b>New Contract Rate</b></p>

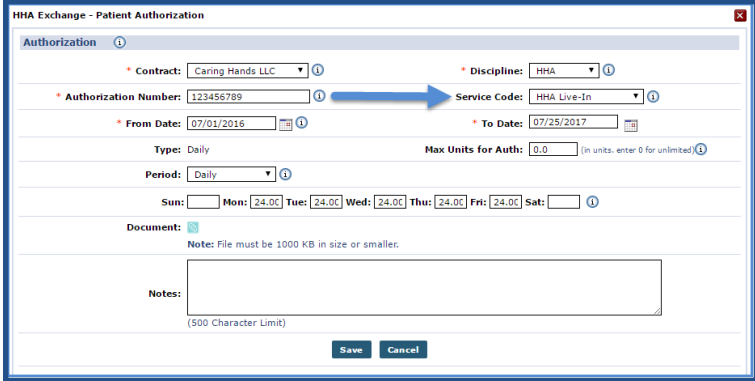
## Patient Configuration

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

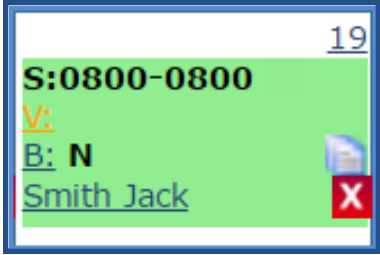
An **Authorization** must be setup for service provided in a **Live-In Visit**. Complete the following steps to create or edit an **Authorization**.

Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> 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 <b>Add</b> 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 <b>Service Code</b> that is set up for <b>Live-In Visit</b> . Select <i>Daily</i> for the <b>Period</b> and set each day the Patient receives service to 24.

Step	Action
	 <p style="text-align: center;"><b>New Authorization</b></p>
5	Click <b>Save</b> .

## Scheduling and Confirmation

Complete the following steps to schedule **Live-in Visits**.

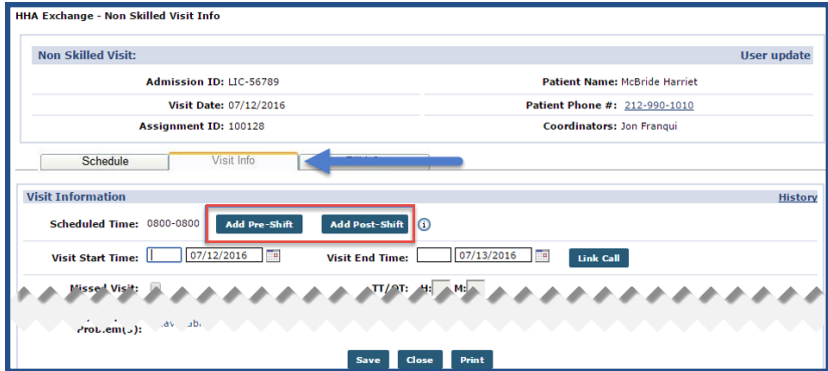
Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the applicable Patient.
2	Select <b>Calendar</b> from the left navigation panel.
3	Select a date and add a <b>New non-skilled visit</b> . Complete all required fields (denoted with red asterisk*). Ensure to select the correct <b>Service Code</b> . For <b>Live-in Visits</b> , ensure to schedule the hours from <b>0800-0800</b> to indicate a 24-hour shift. Click <b>Save</b> .
4	<p><b>Live-in Visits</b> are confirmed with a single Clock IN and Clock OUT if they are not scheduled back-to-back with another <b>Live-in</b> visit.</p>  <p style="text-align: center;"><b>Live-in Visit Scheduled</b></p>
5	<p>If scheduled back-to-back, the process is as follows:</p> <ol style="list-style-type: none"> <li>1. The Caregiver Clocks IN at <b>0800</b> for the first visit.</li> <li>2. The Caregiver Clocks OUT at <b>0800</b> the following day and enters Duties.</li> <li>3. The system automatically Clocks IN the Caregiver for the next visit at <b>0800</b> if they are scheduled to work it.</li> </ol>

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

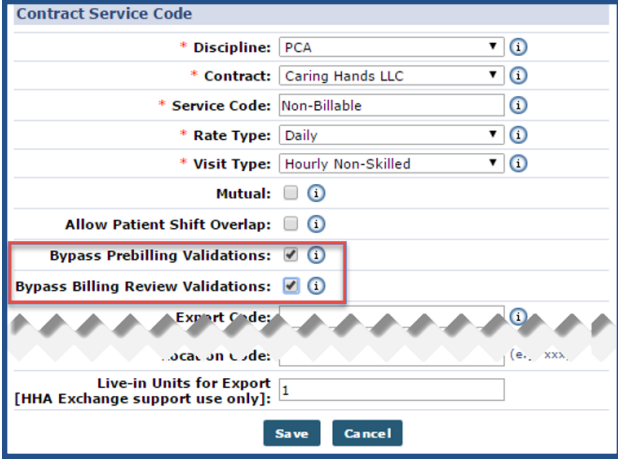

## Pre- and Post-Shifts

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**.

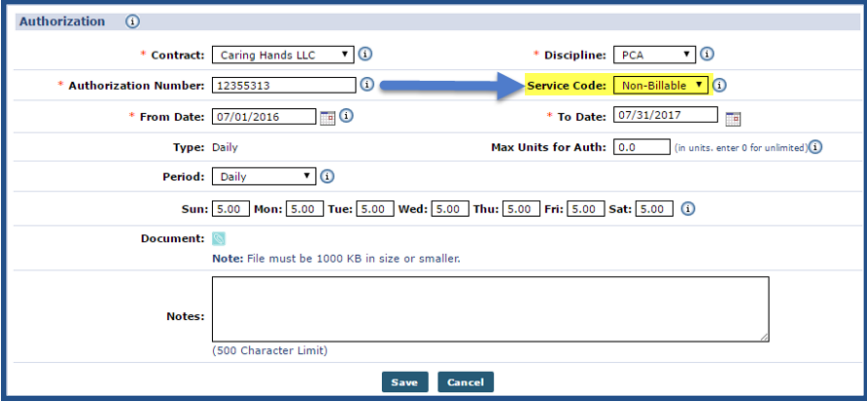

Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select the applicable Patient.
2	Select <b>Calendar</b> from the left navigation panel. Select the applicable visit.
3	<p>Select the <b>Visit Info</b> tab. Click the <b>Add Pre-Shift</b> or <b>Add Post-Shift</b> button, accordingly.</p>  <p style="text-align: center;"><b>Visit Info Tab: Add Pre or Post-Shift</b></p>
4	<p>In this example, the <b>Add Post Shift</b> function is selected. In the <b>Create Post Shift</b> window, enter the <b>Schedule Time</b>, <b>Service Code</b>, <b>Caregiver Code</b>, and a <b>Pay Code</b>. The <b>Primary bill to</b> field defaults to the Contract set for the original visit. Select a non-billable <b>Service Code</b> for the <b>Pre</b> or <b>Post-Shift</b>; because <b>Live-in</b> visits are billed at a flat rate (not on an hourly basis).</p> <p>Click <b>Save</b> to continue.</p>

Step	Action															
	<div data-bbox="485 302 1208 688" style="border: 1px solid black; padding: 5px;"> <p><b>Create Post-Shift</b></p> <p>* Schedule Time: <input type="text" value="0600"/> - <input type="text" value="0800"/> H: <input type="text"/> M: <input type="text"/></p> <p>* Primary bill to: <input type="text" value="Caring Hands LLC"/></p> <p>* Service Code: <input type="text" value="Non-Billable"/></p> <p>* Caregiver Code: <input type="text" value="LIC-1003"/> 2 Anderson Rebecca 100003</p> <p>* Pay Code: <input type="text" value="HHA Base"/></p> <p>After saving, a new shift will be created with the information entered here. The original shift will have its Scheduled End Time reduced to accommodate for the new Post-Shift.</p> <p style="text-align: center;"><input type="button" value="Save"/> <input type="button" value="Close"/></p> </div> <p style="text-align: center;"><b>Create a Post-Shift</b></p>															
5	<p>On the <b>Calendar</b> page, the added <b>Post-Shift</b> appears in Pink. Note that the <b>Schedule Time</b> for the previous <b>Live-in</b> visit has been adjusted in accordance with the <b>Schedule Time</b> of the <b>Post-Shift</b>.</p> <div data-bbox="456 827 1235 1089" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; text-align: center;">11</td> <td style="width: 33%; text-align: center;">12</td> <td style="width: 33%; text-align: center;">13</td> </tr> <tr> <td style="background-color: #90EE90;">S:0800-0600 T V: B: N Davis Julia</td> <td style="background-color: #FFB6C1;">S:0600-0800 T V: B: N Anderson Rebecca</td> <td style="background-color: #90EE90;">S:0800-0800 V: B: N Davis Julia</td> </tr> <tr> <td style="text-align: center;">i</td> <td style="text-align: center;">i</td> <td style="text-align: center;">i</td> </tr> <tr> <td></td> <td style="background-color: #90EE90;">S:0800-0800 V: B: N Davis Julia</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center;">i</td> <td style="text-align: center;">i</td> </tr> </table> </div> <p style="text-align: center;"><b>Post-Shift Scheduled</b></p>	11	12	13	S:0800-0600 T V: B: N Davis Julia	S:0600-0800 T V: B: N Anderson Rebecca	S:0800-0800 V: B: N Davis Julia	i	i	i		S:0800-0800 V: B: N Davis Julia			i	i
11	12	13														
S:0800-0600 T V: B: N Davis Julia	S:0600-0800 T V: B: N Anderson Rebecca	S:0800-0800 V: B: N Davis Julia														
i	i	i														
	S:0800-0800 V: B: N Davis Julia															
	i	i														
6	<p>Correct the Post-Shift to pass Prebilling and Billing Review exception pages. Navigate to <b>Admin &gt; Reference Table Management</b> and select the non-billable <b>Service Code</b>.</p>															
7	<p>On the Contract Service Code page, select the <b>Bypass Prebilling Validations</b> and <b>Bypass Billing Review Validations</b> checkboxes.</p> <p>Click <b>Save</b>.</p> <p>Visits scheduled with the <i>Non-Billable Service Code</i> bypass all validations on the <b>Prebilling</b> and <b>Billing Review</b> exception pages.</p>															

Step	Action
	 <p style="text-align: center;"><b>Bypass Prebilling/Billing Review Validations</b></p>
8	<p>The <b>Post-Shift</b> now displays in white in the Patient's Calendar and may be included in an invoice (as seen in the image below).</p>  <p style="text-align: center;"><b>Billable Post-Shift</b></p>

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

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

Step	Action
	 <p style="text-align: center;"><b>New Authorization</b></p>
5	<p>The <b>Post-Shift</b> now displays in green in the Patient's Calendar as an authorized visit.</p>  <p style="text-align: center;"><b>Authorized Post Visit</b></p>