



Services Portal Management Process Guide

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Overview Services Portal

Overview

The HHAExchange (HHAX) **Services Portal** function helps Electronic Visit Verification (EVV) users meet EVV requirements while keeping choice and control in self-direction among Patients, Caregivers, and Representatives. Providers are responsible for certain Services Portal setups (such as Portal User registration) and can approve or deny shift statuses for visits recorded through EVV.

This documentation provides instructions related to the Services Portal through the Provider application, to include:

- A description of the *Services Portal User Management* page, including permissions setup.
- Instructions for registering Portal Users.
- Instructions for using the visit *Verification* tab to view shared Services Portal information and approve and deny shift statuses.
- Information to detect and resolve a prebilling hold related to Services Portal approval requirements.

For user instructions, refer to the Services Portal User Guide.

HHAX System Key Terms and Definitions

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

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

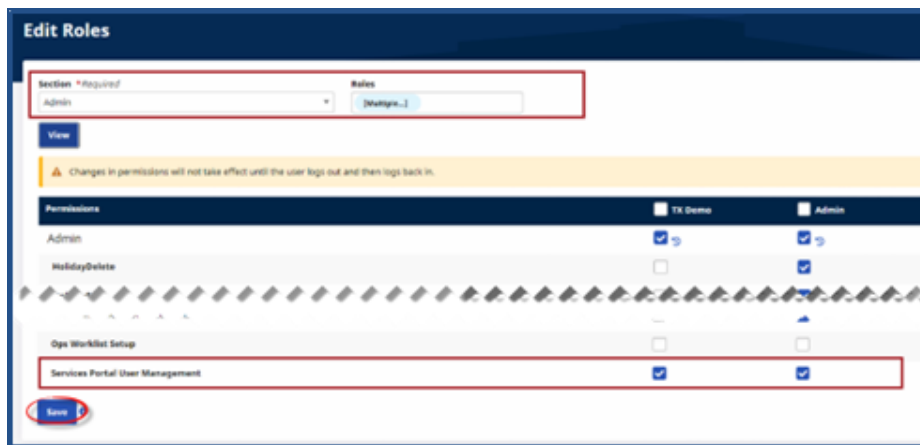
Services Portal User Management Permissions

DISCLAIMER

The **Services Portal User Management** function is activated by HHAX System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

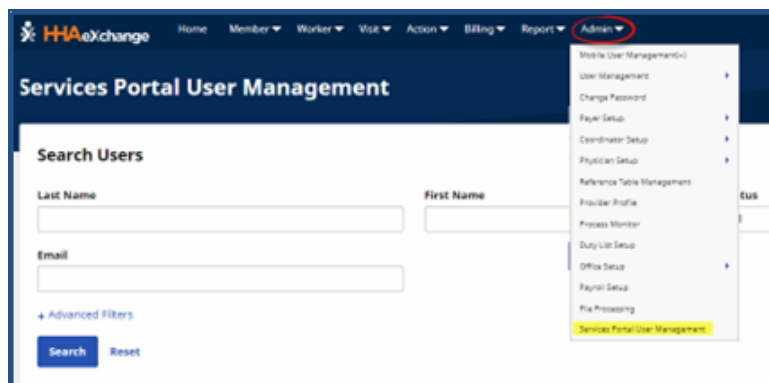
The **Services Portal User Management** function enables Providers to register and manage Services Portal Users such as Patients, Caregivers, and Representatives.

Access to the **Services Portal User Management** feature is role-based and permission is granted via the *Edit Roles* page (**Admin > User Management > Edit Roles**). On the *Edit Roles* page, select **Admin** from the **Section** field and applicable roles from the **Role(s)** dropdown field and click **View**. From the Menu, select the **Services Portal User Management** permission and **Save**.



Permission: Services Portal User Management

Once saved, navigate to **Admin > Services Portal User Management** to access the page.


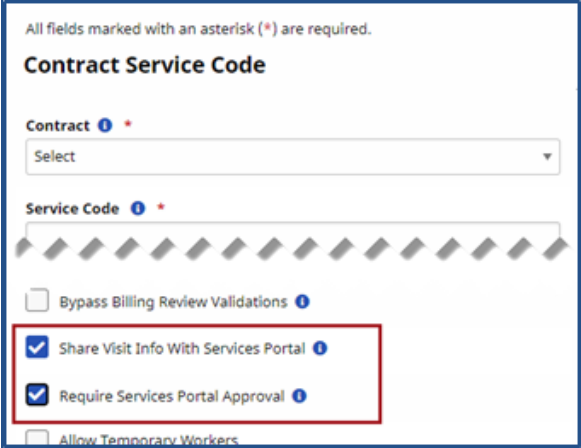


Navigate to Services Portal User Management

Services Portal Contract Service Codes Setup

Authorized Providers must set up Patient visits with the correct service codes that support the Services Portal connection. In the *Contract Service Code* window, the fields **Share Visit Info with Services Portal** and **Require Services Portal Approval** both directly relate to the Services Portal and self-direction approval requirements.

Complete the following steps to set up a Contract Service Code.

Step	Action
1	Navigate to Admin > Reference Table Management .
2	<p>Select <i>Contract Service Code</i> from the Reference Table dropdown field and click Search.</p>  <p style="text-align: center;">Select Contract Service Code</p>
3	Click the Add button at the top-right to add a Service Code.
4	<p>The <i>Contract Service Code</i> window opens. Select Share Visit Info with Services Portal and/or Require Services Portal Approval, as seen in the following image, and described below.</p>  <p style="text-align: center;">Contract Service Code Window: Service Portal Options</p>

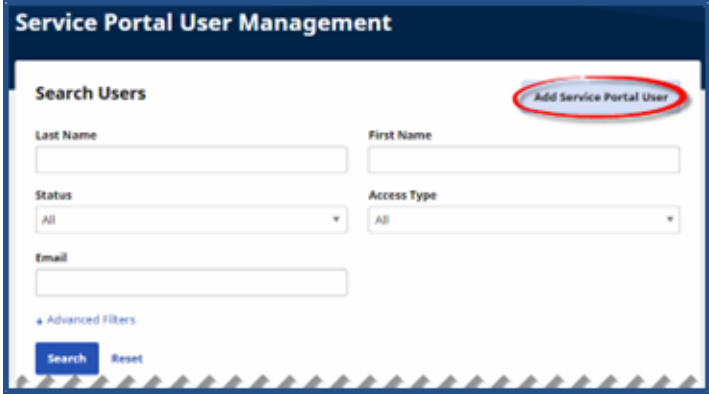
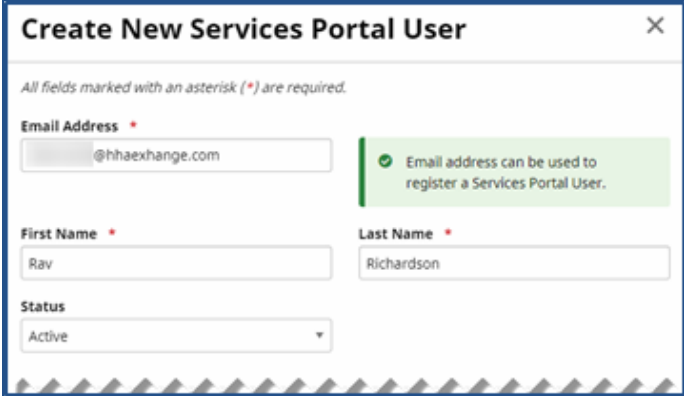
Step	Action
	<ul style="list-style-type: none"> • Select Share Visit Info with Services Portal to display shifts using the Service Code on the Services Portal. Shared Services Portal information for the related visits are listed in the visit Verification tab. Refer to Visit Verification Tab: Services Portal Information topic to obtain further information. • Select Require Services Portal Approval if the shifts using the Service Code require approval by the Patient, Patient Representative, or Provider Coordinator.
5	Click Save .

Note: These fields may not be applicable to all Contracts.

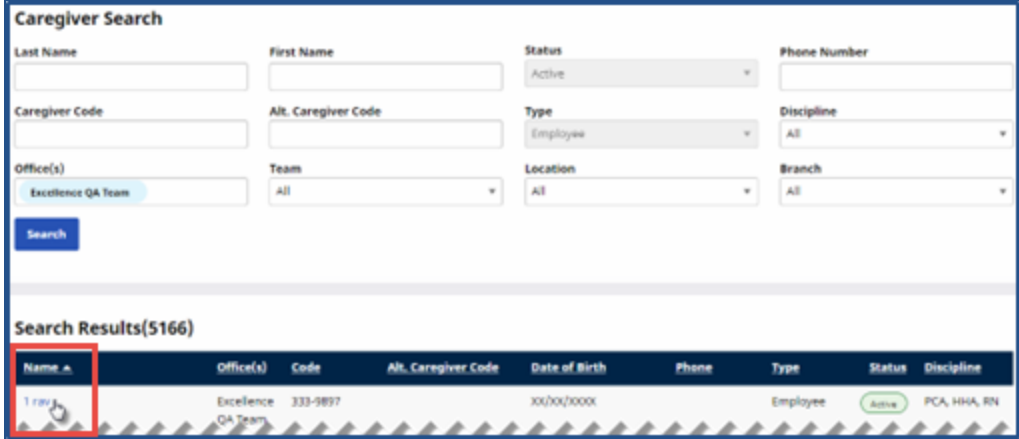
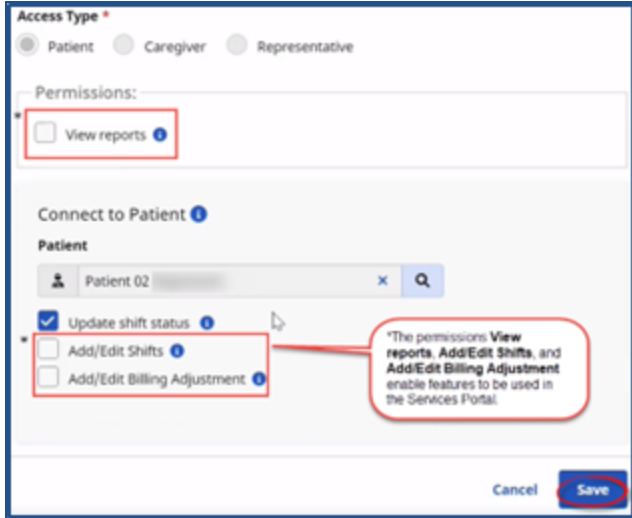
Register Patients and Caregivers


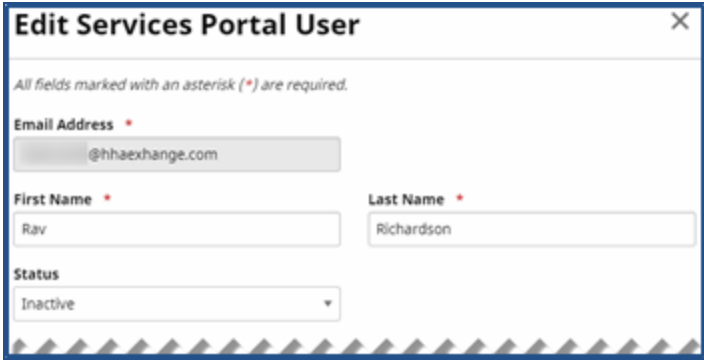
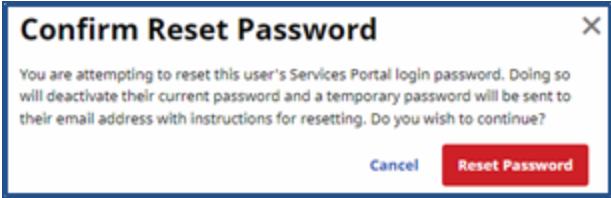
The *Services Portal User Management* page enables authorized Providers to set up and register Portal Users (*Patients, Caregivers, and Representatives*) in the Services Portal.

Complete the following steps to register Patients and Caregivers in the Services Portal.

Step	Action
1	<p>Navigate to Admin > Services Portal User Management. On the top-right of the page, click on the Add Services Portal User button.</p>  <p style="text-align: center;">Add a Services Portal User</p>
2	<p>The <i>Create New Services Portal User</i> window opens. Enter or select values for the required fields (denoted with red asterisks) to define the new Portal User, as described below.</p>  <p style="text-align: center;">Define the New Services Portal User</p> <ul style="list-style-type: none"> • Email Address: (Required) Enter the Portal User’s email address used to register for the portal. This email address is the Portal User’s username used to login and verification purposes. Duplicate email addresses cannot be used across the system. • First/Last Name: (Required) Enter the first and last name of the Portal User. • Status: Select <i>Active</i> to activate the Portal User’s access to the Services Portal. Select

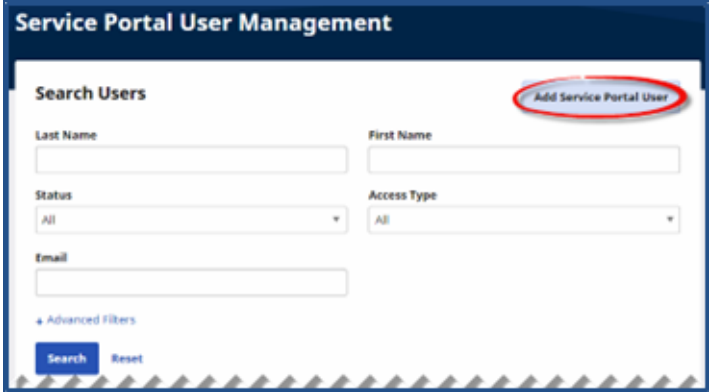
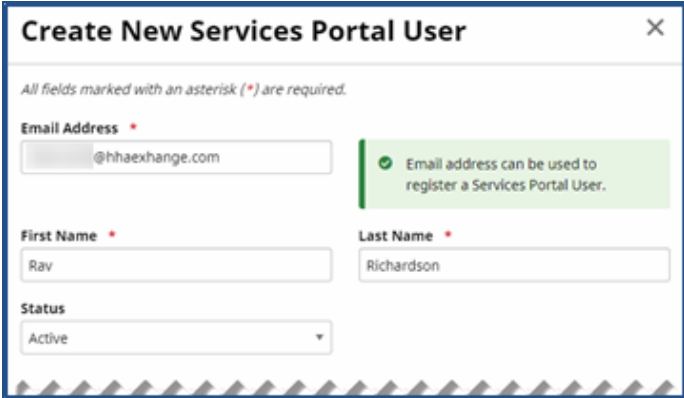
Step	Action																		
	<p><i>Inactive</i> to inactivate the Portal User (user cannot access the portal once inactive).</p>																		
<p>3</p>	<p>In the Access Type required field select <i>Patient</i> or <i>Caregiver</i>. Click on the Search icon to search for the applicable Patient or Caregiver to connect to the Portal User.</p> <p>Refer to the Register Representatives section for registration instruction for Representatives.</p> <div data-bbox="526 527 1166 835" data-label="Image"> </div> <p style="text-align: center;">Select the Access Type for a Portal User</p>																		
<p>4</p>	<p>In the <i>Search Patients</i> window, click the patient's name in the Member Name column to connect to the Portal User.</p> <div data-bbox="350 993 1344 1409" data-label="Image"> <table border="1" data-bbox="358 1276 1336 1402"> <thead> <tr> <th>Member ID</th> <th>Admission ID</th> <th>Member Name</th> <th>Office</th> <th>Coordinator</th> <th>Start Date</th> <th>Status</th> <th>Phone Number</th> <th>DOB</th> </tr> </thead> <tbody> <tr> <td></td> <td>333-9000205985385200</td> <td>evv evv</td> <td>Excellence QA Team</td> <td>RANI WALKER</td> <td>08/01/2019</td> <td>Active</td> <td>929-562-2893, 332-910-7974, 332-910-7974</td> <td>XX-XX-XXXX</td> </tr> </tbody> </table> </div> <p style="text-align: center;">Connect the Patient to the Portal User</p> <p>In the Caregiver Search window, click on the Caregiver Name (link) to connect to the Portal User.</p>	Member ID	Admission ID	Member Name	Office	Coordinator	Start Date	Status	Phone Number	DOB		333-9000205985385200	evv evv	Excellence QA Team	RANI WALKER	08/01/2019	Active	929-562-2893, 332-910-7974, 332-910-7974	XX-XX-XXXX
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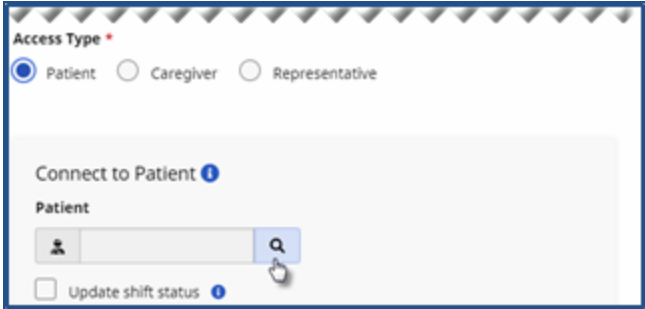
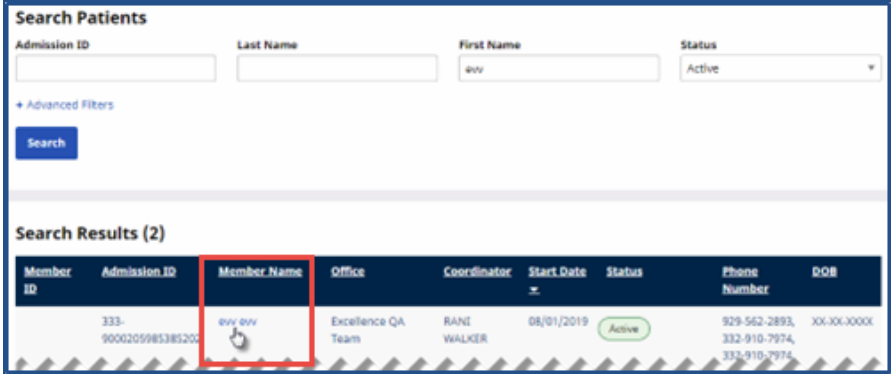
Step	Action
	 <p style="text-align: center;">Connect the Caregiver to the Portal User</p>
5	<p>In the <i>Permissions</i> section, select applicable permissions for the Portal User, as follows:</p> <ul style="list-style-type: none"> • View reports enables the user to view applicable reports in the Services Portal. • Update Shift Status allows the user to update relevant Patient/Caregiver shift statuses. • Add/Edit Shifts allows the user to add and edit shifts directly in the Services Portal. • Add/Edit Billing Adjustment enables the user to adjust billable hours in the Services Portal for shifts as necessary.  <p style="text-align: center;">Save the New Services Portal User</p> <p>Note: Portal Users can still view associated records and status histories even if Update Shift Status is unselected.</p>
6	<p>Once saved, the new Portal User displays on the <i>Services Portal User Management</i> page. Click the ellipsis (...) under the Actions column to edit or reset the password for the Portal User.</p>

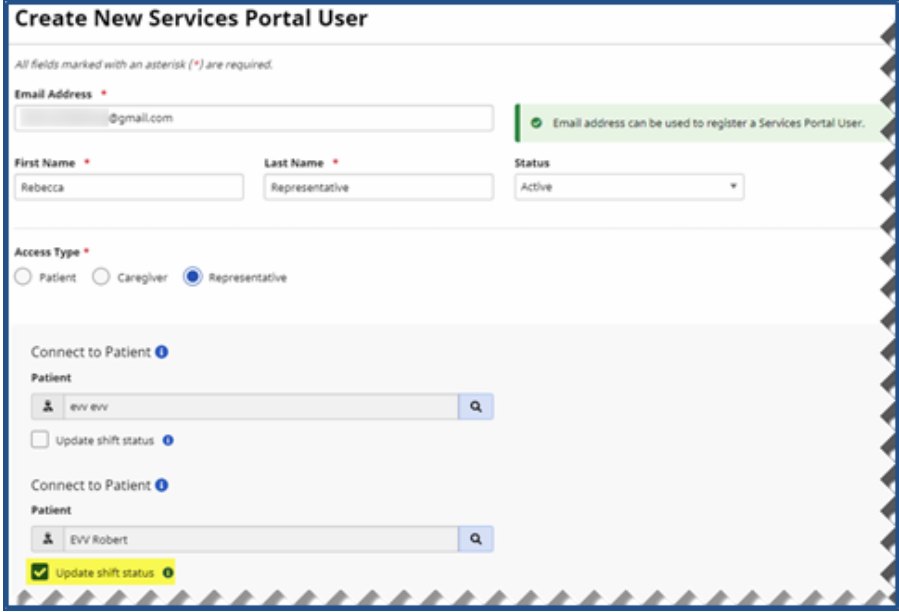
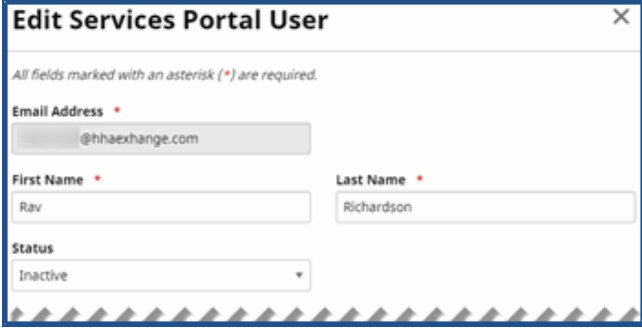
Step	Action
	 <p style="text-align: center;">Edit or Reset Password Actions for a Portal User</p>
7	<p>Select <i>Edit</i> to open the <i>Edit Services Portal User</i> window. Make necessary edits to the user's First/Last Name, Status, and/or Update Shift Status permission. Click Save.</p>  <p style="text-align: center;">Edit Services Portal User</p>
8	<p>Select <i>Reset Password</i> to reset a user's password. Click on Reset Password button in the <i>Confirm Reset Password</i> window.</p>  <p style="text-align: center;">Confirm Reset Password</p>

Register Representatives

Complete the following steps to register Representatives in the Services Portal.

Step	Action
1	<p>Navigate to Admin > Services Portal User Management. On the top-right of the page, click on the Add Services Portal User button.</p>  <p style="text-align: center;">Add a Services Portal User</p>
2	<p>The Create New Services Portal User window opens. Enter or select values for the required fields (denoted with red asterisks) to define the new Portal User, as described below.</p>  <p style="text-align: center;">Define the New Services Portal User</p> <ul style="list-style-type: none"> • Email Address: (Required) Enter the Portal User’s email address used to register for the portal. This email address is the Portal User’s username used to login and verification purposes. Duplicate email addresses cannot be used across the system. • First/Last Name: (Required) Enter the first and last name of the Portal User. • Status: Select <i>Active</i> to activate the Portal User’s access to the Services Portal. Select <i>Inactive</i> to inactivate the Portal User (user cannot access the portal once inactive).
3	<p>In the Access Type required field select <i>Representative</i>. Click on the Search icon to search for the applicable Patient to connect to the Portal User. Click on the Add another patient link to add</p>

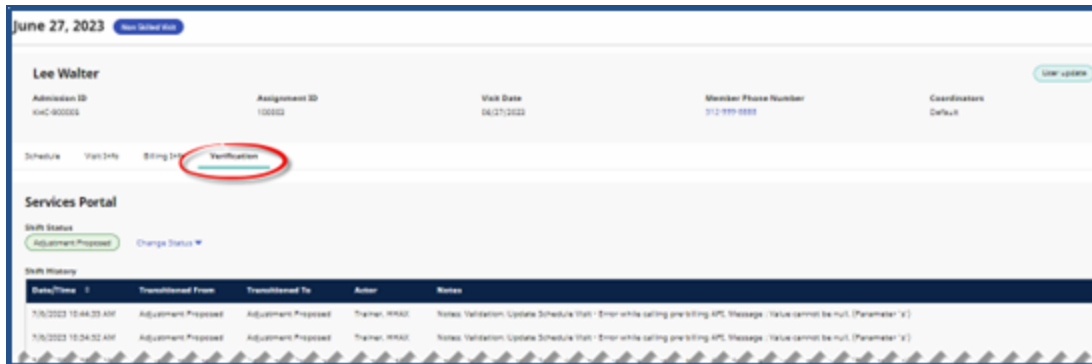
Step	Action
	<p>more than one Patient to the Portal User.</p>  <p style="text-align: center;">Select the Access Type for a Portal User</p>
4	<p>In the <i>Search Patients</i> window, click on the Patient Name (link) to connect to the Portal User.</p>  <p style="text-align: center;">Search for Patient</p>
5	<p>Select Update Shift Status permission field to enable the Portal User to update relevant shift status per Patient(s) using the Services Portal. Click Save.</p>

Step	Action												
	<div data-bbox="402 302 1295 909" data-label="Form">  </div> <p data-bbox="662 919 1036 947" style="text-align: center;">Select Update Shift Status Permission</p> <p data-bbox="272 968 1360 1031">Note: Portal Users can still view associated records and status histories even if Update Shift Status is unselected.</p>												
6	<p data-bbox="272 1045 1425 1115">Once saved, the new Portal User displays on the <i>Services Portal User Management</i> page. Click the ellipsis (...) under the Actions column to edit or reset the password for the Portal User.</p> <div data-bbox="342 1150 1357 1308" data-label="Table"> <table border="1"> <thead> <tr> <th>Portal User Name</th> <th>Email Address</th> <th>Access Type</th> <th>Connected Patients</th> <th>Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Richardson, Rav</td> <td>@hhaexchange.com</td> <td>Caregiver</td> <td>N/A</td> <td>Active</td> <td> <div data-bbox="1101 1213 1312 1297" data-label="List-Group"> <ul style="list-style-type: none"> Edit Reset Password </div> </td> </tr> </tbody> </table> </div> <p data-bbox="605 1325 1084 1350" style="text-align: center;">Edit or Reset Password Actions for a Portal User</p>	Portal User Name	Email Address	Access Type	Connected Patients	Status	Actions	Richardson, Rav	@hhaexchange.com	Caregiver	N/A	Active	<div data-bbox="1101 1213 1312 1297" data-label="List-Group"> <ul style="list-style-type: none"> Edit Reset Password </div>
Portal User Name	Email Address	Access Type	Connected Patients	Status	Actions								
Richardson, Rav	@hhaexchange.com	Caregiver	N/A	Active	<div data-bbox="1101 1213 1312 1297" data-label="List-Group"> <ul style="list-style-type: none"> Edit Reset Password </div>								
7	<p data-bbox="272 1360 1360 1430">Select <i>Edit</i> to open the <i>Edit Services Portal User</i> window. Make necessary edits to the user's First/Last Name, Status, and/or Update Shift Status permission. Click Save.</p> <div data-bbox="529 1465 1166 1791" data-label="Form">  </div> <p data-bbox="727 1801 971 1833" style="text-align: center;">Edit Services Portal User</p>												
8	<p data-bbox="272 1843 1425 1873">Select <i>Reset Password</i> to reset a user's password. Click on Reset Password button in the <i>Confirm</i></p>												

Step	Action
	<p><i>Reset Password window.</i></p> <div data-bbox="542 373 1149 569" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Confirm Reset Password ✕</p> <p>You are attempting to reset this user's Services Portal login password. Doing so will deactivate their current password and a temporary password will be sent to their email address with instructions for resetting. Do you wish to continue?</p> <p style="text-align: right;"> Cancel Reset Password </p> </div> <p style="text-align: center;">Confirm Reset Password</p>

Visit Verification Tab: Services Portal Information

The *Verification* tab is comprised of two sections: the *Services Portal* information section and the **Shift History** table within the section. The table below describes the fields related to the Services Portal information.

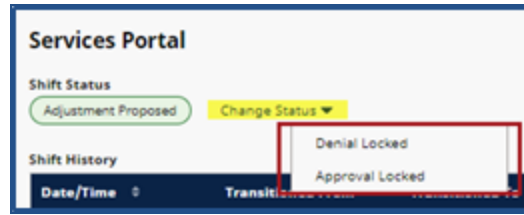


Visit Verification Tab: Shared Services Portal Information

Field	Description
Shift Status	The most recent type of status update performed.
Shift History	The historic table of shift status updates.
Change Status	<p>(Link) Select <i>Approval Locked</i> or <i>Denial Locked</i> for a shift status. <i>Approval Locked</i> locks an approval for a visit into place and overrides any previous shift status. <i>Denial Locked</i> locks a denial for a visit into place and overrides any previous shift status.</p> <p>Note: If a visit is billed, Approval Locks are not allowed.</p>

If **Share Visit Info with Services Portal** is enabled for the related Contract Service Code, then the Shared Services Portal information displays in Services Portal section in the *Verification* tab for a Patient using Self-Direction services, as seen the image above.

If **Require Services Portal Approval** is enabled, then authorized Provider Coordinators can lock shift approvals and denials in the *Verification* tab. Click on the [Change Status](#) link to deny or approve a shift status, as seen in the image below.




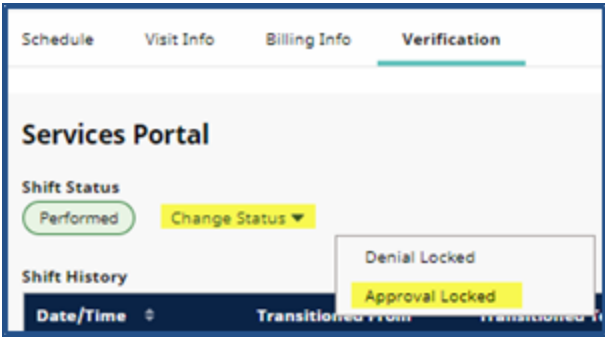
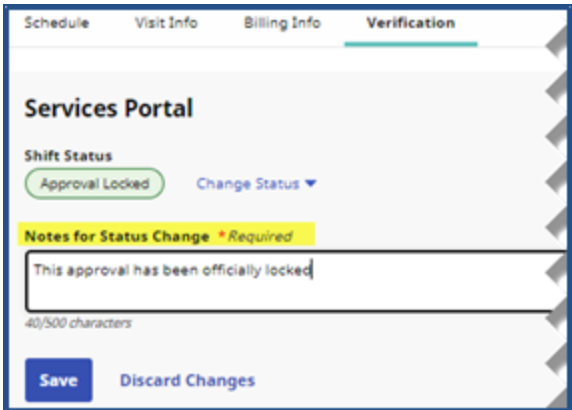
Visit Verification Tab: Change Status to Denial or Approval Locked

The following table defines the fields in the *Shift History* section.

Field	Description
Date/Time	The date and time when the shift status change occurred.
Transitioned From/To	The updated transition from one shift status to another status.
Actor	The Portal or Provider Coordinator responsible for updating the status.
Notes	Supporting notes written by the actor pertaining to the status update.

Locked Shift Approval

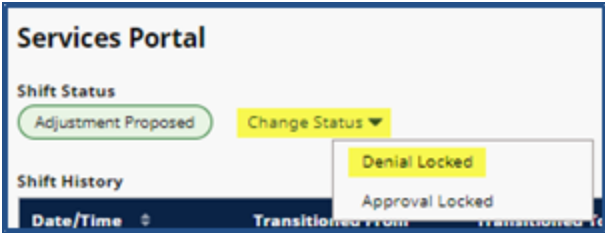
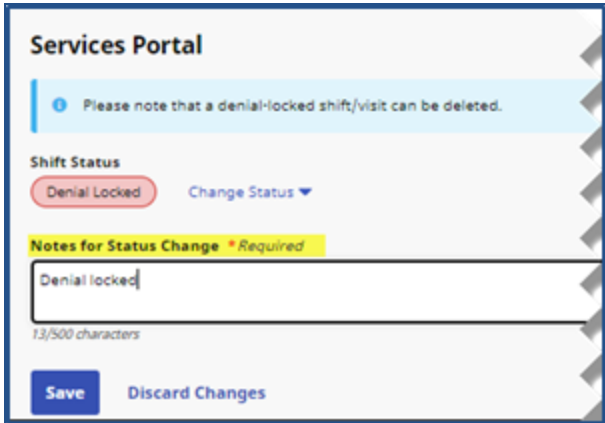
Complete the following steps to lock shift approvals.

Step	Action
1	<p>Navigate to <i>Patient</i> > <i>Search Patient</i> > <i>Calendar</i>. Select the visit to approve.</p>  <p>Select the Visit to Approve</p>
2	<p>In the <i>Verification</i> tab, click on the Change Status link and select <i>Approval Locked</i>.</p>  <p>Approval Locked Shift Status</p>
3	<p>Enter a supporting note in the Notes for Status Change (required) field. Click Save.</p> 

Step	Action
	Enter a Note for the Shift Status Change (Approval)
4	<p>Click OK. The saved Shift Status displays in the <i>Verification</i> tab, as seen below.</p> <div data-bbox="685 424 1010 569" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Services Portal</p> <p style="text-align: center;">Shift Status</p> <p style="text-align: center;">Approved Locked</p> </div> <p style="text-align: center;">Approval Locked Shift Status</p>

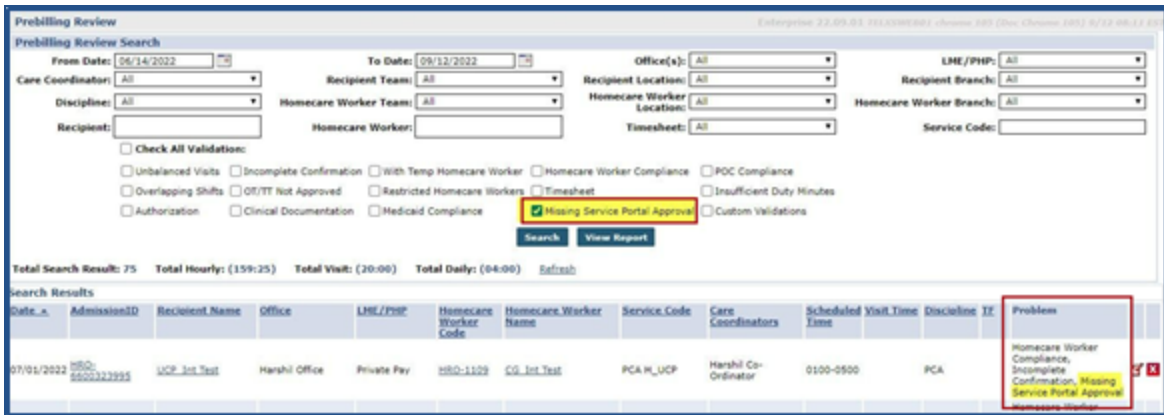
Locked Shift Denial

Complete the following steps to lock shift approvals.

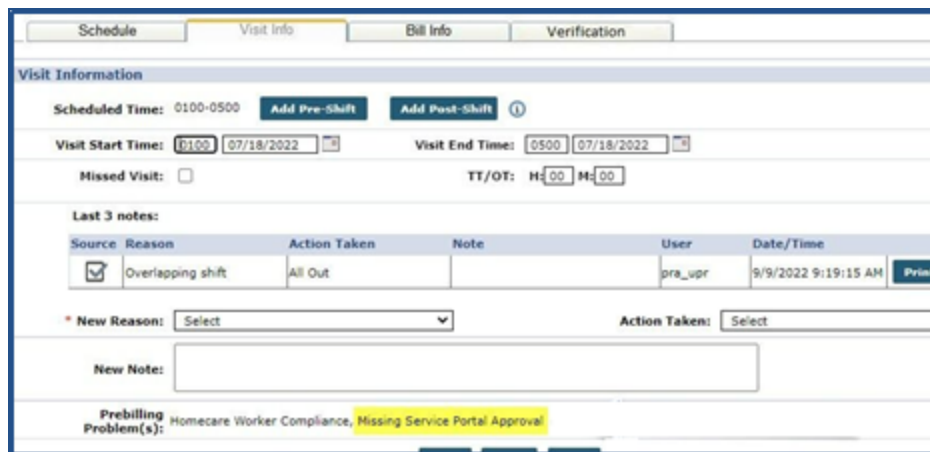
Step	Action
1	Navigate to Patient > Search Patient > Calendar . Select the visit to deny.
2	<p>In the <i>Verification</i> tab, click on the Change Status link and select <i>Denial Locked</i>.</p>  <p style="text-align: center;">Denial Locked Shift Status</p>
3	<p>Enter a supporting note in the Notes for Status Change (required) field. Click Save.</p>  <p style="text-align: center;">Enter a Note for the Shift Status Change (Denial)</p>
4	Once saved, the visit is deleted from the calendar.
5	The saved Shift Status displays in the <i>Verification</i> tab as <i>Denial Locked</i> .

Prebilling Hold - Missing Services Portal Approval

When the **Require Services Portal Approval** field is applied to a Contract Service Code, the visit must meet the approval requirements; otherwise, a *Missing Services Portal Approval Problem* displays in the *Prebilling Review* page (top image) and in the *Visit Info* tab on the Patient calendar (second image).



Prebilling Review: Missing Service Portal Approval



Visit Info Tab: Missing Service Portal Approval

Resolving Prebilling Hold

To resolve this type of prebilling hold, authorized Providers can wait for the appropriate Portal Users to perform the approval requirements. In some cases, if a Portal User cannot fulfill such requirements, Provider Coordinators can perform shift *Approval* and *Denial* Locks for the related pending visits.

For instructions regarding shift approval to resolve this hold, refer to [Locked Shift Approval](#).

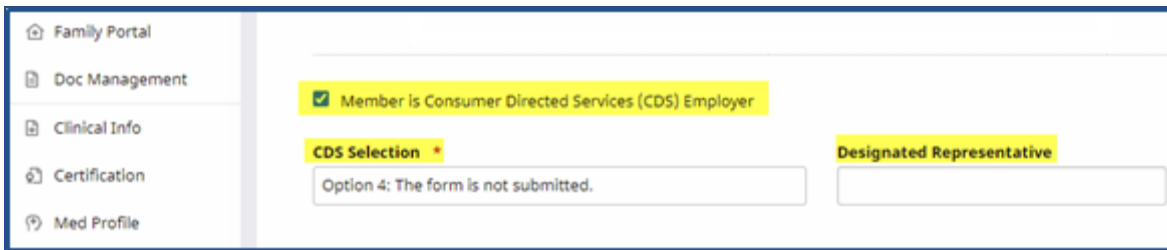
Services Portal CDS Reports

The Services Portal displays CDS-specific standard reports to Patients (or CDS Employers) based on the related configured permissions. The reports are as follows:

- EVV Service Provider History Report
- EVV CDS Employer Usage Report
- EVV Service Provider Clock In and Clock Out Report
- EVV Reason Code Usage and Free Text Report
- EVV Units of Service Summary Report

CDS Employer Patient Profile Configuration

In the *Patient General* page (*Patient > Search Patient > General*), the **Patient is a Consumer-Directed Services (CDS) Employer** checkbox field can be selected to identify a Patient’s active role as a CDS Employer (as seen in the image below).



Agency Profile: Logo

If the Patient is a CDS Employer, select the applicable **CDS Selection** option using the dropdown. Enter the name of the **Designated Representative** for the Patient.

The **CDS Selection** options are described in the table below.

CDS Selection Option	Description
Option 1	I will enter my approval of the time my CDS employee worked in the EVV system, and I will perform visit maintenance in the EVV system.
Option 2	I will enter my approval of the time my CDS employee worked in the EVV system. I delegate the performance of visit maintenance to the FMSA. After the FMSA completes visit maintenance, I will enter my approval in the EVV system of any changes to time worked made by the FMSA, if necessary, as part of visit maintenance.
Option 3	The FMSA will confirm my approval of the time my CDS employee worked in the EVV system. I delegate the performance of EVV visit maintenance to the FMSA.
Option 4	The form is not submitted. Note: Option 4 is the default value.

Note: In the state of Texas, the CDS options for the Patient support EVV-related visit maintenance policies.