

HAexchange 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.
ННАХ	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*.

1	Edit Roles			
ľ	Section *Anapoled Bales]		
	View			
	Changes in permissions will not take effect until the user logs out and then logs back in.			
	Permissions	TX Demo	Admin	
	Admin	🖬 🔊	2 9	
	HolidayDelete		•	
1	· · · · · · · · · · · · · · · · · · ·	とんんんんん	A. 130. 10. 10.	1.1.
			-	
	Ops Worklist Setup			_
	Services Portal User Management			

Permission: Services Portal User Management

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

* HAeXchange Home Member - Worker - Visk -	Action - Billing - Report -	Admin		
		Mobile User Management(~)		
Services Portal Liser Management		User Management	÷	
services Fortal Oser Management		Change Recovord		
		Pajar Setup	•	_
		Ceordinator Setup	÷	
Search Users		Physician Setup	÷	
		Reference Table Hanagement		
Last Name	First Name	Provider Profile		cus
		Process Monitor		·
faul		Duty List Setup		
Ense		Office Setup	٠	
		Payral Serup		
+ Advanced Filters		The Processing		
		Services Portal User Management		
Search Reset				





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.

Step Action Navigate to Admin > Reference Table Management. 1 Select *Contract Service Code* from the **Reference Table** dropdown field and click *Search*. **Reference Table Management Reference Table** 2 Select Select Fiscal Export Code Caregiver Pay Code Collection - AR Note Reason Deductions Select Contract Service Code 3 Click the *Add* button at the top-right to add a Service Code. The Contract Service Code window opens. Select Share Visit Info with Services Portal and/or **Require Services Portal Approval**, as seen in the following image, and described below. All fields marked with an asterisk (*) are required. **Contract Service Code** Contract 0 * Select v 4 Service Code 0 Bypass Billing Review Validations () \checkmark Share Visit Info With Services Portal 0 Require Services Portal Approval 🕕 Tem porary Worke **Contract Service Code Window: Service Portal Options**

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

Step	Action			
	 Select Share Visit Info with Services Portal to display shifts using the Service Code on Services Portal. Shared Services Portal information for the related visits are listed in the visit Verification tab. Befer to Visit Verification Tab: Services Portal Information topic 			
	 • 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.

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fields				
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'n				
۰t				



Step	Action				
	Inactive to inactivate the Portal User (user cannot access the portal once inactive).				
	In the Access Type required field select <i>Patient</i> or <i>Caregiver</i> . Click on the <i>Search</i> icon to search for the applicable Patient or Caregiver to connect to the Portal User. Refer to the <u>Register Representatives</u> section for registration instruction for Representatives.				
3	Access Type * Patient Caregiver Representative				
	Connect to Patient Patient Update shift status				
	Select the Access Type for a Portal User				
	to the Portal User. Search Patients Last Name First Name Status Active				
4	Search Results (2)				
	Member ID Admission ID 333- 9000205985385200 Member Name WV Office Coordinator Start. Date Team Start. Date Start. Date Team Start. Date Start. Date Team Start. Date Start. Date Team Start. Date Start. Date Start. Date Team Start. Date Start. Date Team Start. Date Start. Date Team Start. Date Start. Date Team Start. Date Start. Date Start. Date Team Start. Date Team Start. Date Start. Date Team Start. D				
	Connect the Patient to the Portal User				
	In the Caregiver Search window, click on the Caregiver Name (link) to connect to the Portal User.				



Step		Act	tion			
	Caregiver Search					
	Last Name	First Name	Status	Phone Number		
			Active			
	Caregiver Code	Alt. Caregiver Code	Type Employee v	All v		
	Office(s)	Team	Location	Branch		
	Excellence QA Team	Al	Al v	All v		
	Search					
	Search Results(5166)					
	Name A Office	e(s) Code Alt. Caregiver Code	Date of Birth Phone	Type Status Discipline		
	Travy, Excel	lence 333-9897		Employee Antw PCA, HHA, RN		
		Connect the Conecin	ay to the Doutel Lleav			
			er to the Portal User			
	In the Permissions section,	select applicable perr	nissions for the Porta	User, as follows:		
	View reports enable	es the user to view app	blicable reports in the	Services Portal.		
	Update Shift Status	allows the user to up	date relevant Patient,	Caregiver shift statuses.		
	Add/Edit Shifts allo	ws the user to add and	d edit shifts directly in	the Services Portal.		
	 Add/Edit Billing Adj 	justment enables the	user to adjust billable	hours in the Services Portal		
	for shifts as necessa	ary.				
	Acces	is Type *				
		ratient Caregiver Represen	tative			
	Pe	rmissions:				
		View reports				
5						
5	Co	onnect to Patient 🕕				
	Pa	tient				
		Patient 02	×Q			
		Update shift status 🏮 🖒	The normissions Manu			
	•	Add/Edit Shifts 0	reports, Add/Edit Shifts, and Add/Edit Billing Adjustment			
		Add/Edit Billing Adjustment 0	enable features to be used in the Services Portal.			
			Cancel	Save		
	Note: Portal Users can still y	iew associated records a	nd status historias avan	if Undata Shift Status is		
	unselected.		na statas nistories even	ij opuale sinit status is		
	Once saved, the new Porta	al User displays on the	Services Portal User I	Management page. Click the		
6	ellipsis () under the Actio	ons column to edit or r	eset the password fo	r the Portal User.		
-						

Step		A	ction			
	Portal User Name	Email Address Access	Type Connected Patients	Status Actions		
	Richardson, Rav	@hhaexhange.com Careghy	er N/A	Active		
				Reset Password		
		Edit or Reset Password	Actions for a Portal User			
	Select <i>Edit</i> to open the	Edit Services Portal User	window. Make necess	ary edits to the user's		
	First/Last Name, Statu	s, and/or Update Shift S	tatus permission. Click	, Save.		
	Ed	it Services Portal Use	er	×		
	All 6	elds marked with an asterisk (*) are required	đ.			
7	Ema	il Address *				
,		ignnaexnange.com	Leet Marrie &			
	Rav	name -	Richardson			
	Stati	us				
	Ina	ctive *				
	P-4	Edit Canita				
	Select Reset Password	to reset a user's passwor	es Portal User d Click on Reset Pass	vord button in the <i>Confirm</i>		
	Reset Password window	W.				
		Confirm Reset Pas	sword	×		
8		You are attempting to reset this user's a will deactivate their current password a	Services Portal login password. Doing s ind a temporary password will be sent t	0		
		their email address with instructions for	r resetting. Do you wish to continue?			
			Cancel Reset Passwor	d		
		Confirm Re	eset Password			

Register Representatives

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

Step	Action					
	Navigate to Admin > Services Portal User Manu the Add Services Portal User button	agement . On the top-right of the page, click on				
	the Add Services Fortal Oser Batton.					
	Service Portal User Management					
	Search Users	Add Service Portal User				
1	Last Name	First Name				
-	Status	Access Type				
	Email					
]				
	Advanced Filters Search Reset					
	****	****				
		es Portal User				
	The Create New Services Portal User window op (denoted with red asterisks) to define the new	ens. Enter or select values for the required fields Portal User, as described below				
	Create New Services P	ortal User ×				
	All fields marked with an asterisk (*) are requir	ed.				
	Email Address *					
	@hhaexhange.com	 Email address can be used to register a Services Portal User. 				
	First Name *	Last Name *				
2	Rav	Richardson				
2	Status					
	Active *					

	Define the New Services Portal User					
	• 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.					
	al User's access to the services Portal. Select					
	In the Access Type required field select Represe	entative. Click on the Search icon to search for the				
3	applicable Patient to connect to the Portal User	. Click on the Add another patient link to add				





Step	Action				
	more than one Patient to the Portal User.				
	Access Type *				
	Patient Caregiver Representative				
	Connect to Patient ()				
	Patient				
	* 9				
	Update shift status 🕚				
	Select the Access Type for a Portal User				
	In the <i>Search Patients</i> window, click on the Patient Name (link) to connect to the Portal User.				
	Search Patients				
	Admission ID Last Name First Name Status				
	+ Advanced Filters				
	Search				
4					
	Search Results (2)				
	Member Admission ID Member Name Office Coordinator Start Date Status Phone DOB ID				
	333- evv evv Excellence QA RANI 08/01/2019 Active 929-562-2893, XX-XX-XX-XX-XX-XX-XX-XX-XX-XX-XX-XX-XX-				
	Search for Patient				
_	Select Update Shift Status permission field to enable the Portal User to update relevant shift				



Step		Å	Action	
	Create	New Services Portal User		
	All fields mark	ed with an asterisk (*) are required.		
	Email Addres	t •		
		a francom	 Email address can be used to 	to register a Services Portal User.
	First Name * Rebecca	Last Name * Representative	Status Active	· ·
	Access Type	0		<
	O Patient	Caregiver V Representative		
	Connect	to Datiant		2
	Patient			
	A ev.	ev	Q	
	Updat	e shift status 0		
	Connect	to Patient 0		1
	A EW	Robert	Q	2
	Updat	e shift status 🛛 🔘		
	* * *		* * * * * * * * * *	
		Select Update S	hift Status Permission	
	Note: Portal Users of	an still view associated records	s and status histories ever	if Update Shift Status is
	unselected.			
	Once saved, the n	ew Portal User displays on th	ne Services Portal User	Management page. Click the
	ellipsis () under t	he Actions column to edit o	r reset the password fo	r the Portal User.
	Bostal Licer Name	· Email Address · Acces	Time Connected Ballante	. Status : Astions
6	Pichardson Pay	China Access Cares	har N/A	
	Noter Goot, new	grinaeshange.com Careg		Edit
				Reset Password
		Edit or Posot Posswo	rd Actions for a Portal Usor	
	Select <i>Edit</i> to oper	the Edit Services Portal Lise	window Make neces	sary edits to the user's
	First/Last Name	status, and/or Update Shift !	Status permission. Click	Save.
		Edit Services Portal Us	ser	×
		All faile marked with an acterick (*) are requi	and	
		Email Address	16-16-1	
7		@hhaexhange.com		
		First Name *	Last Name *	
		Rav	Richardson	
		Status		
		Inactive	Ŧ	
		Edit Servi	ces Portal User	
8	Select Reset Passu	<i>ora</i> to reset a user's passwo	ora. Click on <i>Reset Pass</i>	word button in the Confirm



Step	Action					
	Reset Password window					
	Confirm Reset Password ×					
		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?				
		Cancel Reset Password				
	Confirm Reset Password					



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.

June 27, 2023 💽	a later tax						
Lee Walter						٩	iar spira
Admission ID Xx4C-000005		Antigement ID 100002		Vait Date 04(37)3123	Meetiker Phote Number 312-999-0888	Coordinators Default	
Scherule VacSHs	Strig In Charles						
Services Portal							
Shift Status Adjustment/Proposed	Olanga Status 🕷						
Shift History							
Data/Time 1	Transitioned From	Transitioned To	Actor	Notes			
7/8/2023 10:44:33 AM	Adjustment Propered	Adjustment Proposed	Trainer, HINKS	Notes: Validation: Update Schedule Visit	Shor while calling pre-billing APC Message (Value cannot be null. (Para	mater (x)	
7/R/2023 10:04:02 AM	Adjustment Proposed	Adjustment Proposed	Trainer, MISSO	Notes: VehicleTern Update Schedule Visit	there while calling pre-billing APC. Message , Yakue cannot be null. (Para	mater's')	
6.0.0.0.0	1111	1.1.1.1.1	1.1.1.		**********	1111111	11

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	(Link) Select Approval Locked or Denial Locked for a shift status. Approval Locked locks an approval for a visit into place and overrides any previous shift status. Denial Locked locks a denial for a visit into place and overrides any previous shift status. Note: If a visit is billed, Approval Locks are not allowed.

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 <u>Change Status</u> link to deny or approve a shift status, as seen in the image below.

Services Portal		
Shift Status Adjustment Proposed	Change Stat	us 💌
Shift History		Denial Locked
Date/Time 0	Transit	Approval Locked

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	The updated transition from one shift status to another			
From/To	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
	Navigate to Patient > Search Patient > Calendar . Select the visit to approve.
1	27 ● 5: 1000-1030 ● V:1000-1030 Billed: N (00:30) ■ Lopez Maria ● 5: 1045-1100 Billed: N (00:15) ■ Lopez Maria ① Sciloct the Micie to Approve
	In the Verification tab. click on the Change Status link and select Approval Locked.
2	Schedule Visit Info Billing Info Verification Services Portal Shift Status Performed Change Status Denial Locked Approval Locked Approva
	Enter a supporting note in the Notes for Status Change (required) field. Click <i>Save</i> .
3	Schedule Visit Info Billing Info Verification Services Portal Shift Status Approval Locked Change Status Notes for Status Change * Required This approval has been officially locked 40/500 characters Save Discard Changes



Step	Action				
	Enter a Note for the Shift Status Change (Approval)				
4	Clik OK . The saved Shift Status displays in the <i>Verification</i> tab, as seen below.				
	Approval Locked Shift Status				



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.					
	n the <i>Verification</i> tab, click on the <u>Change Status</u> link and select <i>Denial Locked</i> .					
2	Services Portal Shift Status Adjustment Proposed Change Status Denial Locked Approval Locked Date/Time					
	Denial Locked Shift Status					
3	Enter a supporting note in the Notes for Status Change (required) field. Click Save. Services Portal Please note that a denial-locked shift/visit can be deleted. Shift Status Denial Locked Change Status * Notes for Status Change *Required Denial locked Sove Discard Changes Enter a Note for the Shift Status Change (Denial)					
4	Once saved, the visit is deleted from the calendar.					
5	The saved Shift Status displays in the Verification tab as Denial Locked.					



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							Enterp	rise 22.09.01	TELESTICE	11. cheuma 149.(Dec Chrome 105) 9/12 00	60.69
Prebilling	Review Sear	ch											
Fre	en Date: 06/14	/2022		To Date:	09/12/2022		Office(s):	All			LME/PHP:	All	•
Care Coor	dinator: All		Recipie	ent Teami	Al	* Re	cipient Location:	All		Rec	ipient Branch:	All	•
Di	scipline: All		Homecare Work	ker Team:	All	•	Iomecare Worker	All	• •	lomecare W	lorker Branch:	All	•
R	ecipient:		Homecare	e Worker:			Timesheet:	All	٠		Service Code:		
		eck All Validation:	_	-									
	0 Un	belanced Visits Div	complete Confirmation	With Ter	np Homecare W	orker Homecare	Worker Compliance	POC Compliance					
	00	erlapping Shifts 00	(/TT Not Approved	Restricts	ed Homecare Wo	rkers Timesheet		Insufficient Duty	Hinutes				
	DA	thorization Ci	nical Documentation	Medicaid	Compliance	Missing Se	rvice Portal Approval	Custom Validatio	ana				
						Concession in the local division in the loca							
						Search Vi	ese Report						
Total Sear	ch Result: 75	Total Hourly: (159:	25) Total Visit: (2	20:00) T	otal Daily: (04	:00) <u>Eefresh</u>							
Search Re	sults												
Date_A	AdmissionID	Recipient Name	Offlice L	HE/PHP	Homecare Worker Code	Homecare Works Name	r Service.Code	Care Coordinators	Scheduled	Visit Time	Discieline II	Problem	
07/01/2022	180: 5500323995	UCP. Int Test	Harshil Office P	vivate Pay	HRD-1109	CG_Int Test	PCA H_UCP	Harshil Co- Ordinator	0100-0500		PCA	Homecare Worker Compliance, Sncomplete Confirmation, Mosing Service Portal Approval	3 X
												Hampson Harler	1

Prebilling Review: Missing Service Portal Approval

Sched	ule Vis	it Info	Bill Info Ver	rification	
Visit Informat	ion				
Scheduled	Time: 0100-0500	Add Pre-Shift	Add Post-Shift		
Visit Start	Time: 0100 07/18	8/2022	Visit End Time: 0500	07/18/2022	
Misse	d Visit:		TT/OT: H:00	M:00	
Last 3	notes:				
Source	Reason	Action Taken	Note	User	Date/Time
1	Overlapping shift	All Out		pra_upr	9/9/2022 9:19:15 AM
* New R	eason: Select		*	Action Taken:	Select
New	Note:				
Pre	billing Homecare Worl	ker Compliance, Missin	Service Portal Approval		
Proble	em(s):	and and a set the set			

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.



Overview Services Portal



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).

Family Portal		
Doc Management	Member is Consumer Directed Services (CDS) Employer	
Clinical Info	CDS Selection *	Designated Representative
Certification	Option 4: The form is not submitted.	
Med Profile		

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. <i>Note: Option 4 is the default value.</i>

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