Communications Process Guide

For Linked Contract Patients

Document Revision History

Date	Description of Revision
05/14/2020	Initial version of the document
03/18/2021	Accessibility standards applied
08/23/2022	General updates

Table of Contents

Overview

The **Communications Module** provides a streamlined look and feel across all HHAX environments. Users can see the interchange (message thread) and reply to all related messages to include the original message. This design applies to all communications (Patient and Non-Patient) and to all communications pages throughout the system (*Home*, *Patient Notes*, and *Payer Communications*).

The **Communications** functionality in HHAeXchange (HHAX) provides interconnectivity between a *Payer* and a *Provider* servicing a Linked Contract Patient. This feature allows both parties to communicate with one another, facilitating a fluid exchange of Patient, Scheduling, Medical, and Authorization information between users.

This process guide covers the various forms of communication functions within the HHAX system and how to manage reviewing, creating, replying, and closing each type of message.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Client Support.

HHAX System Key Terms and Definitions

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

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving 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

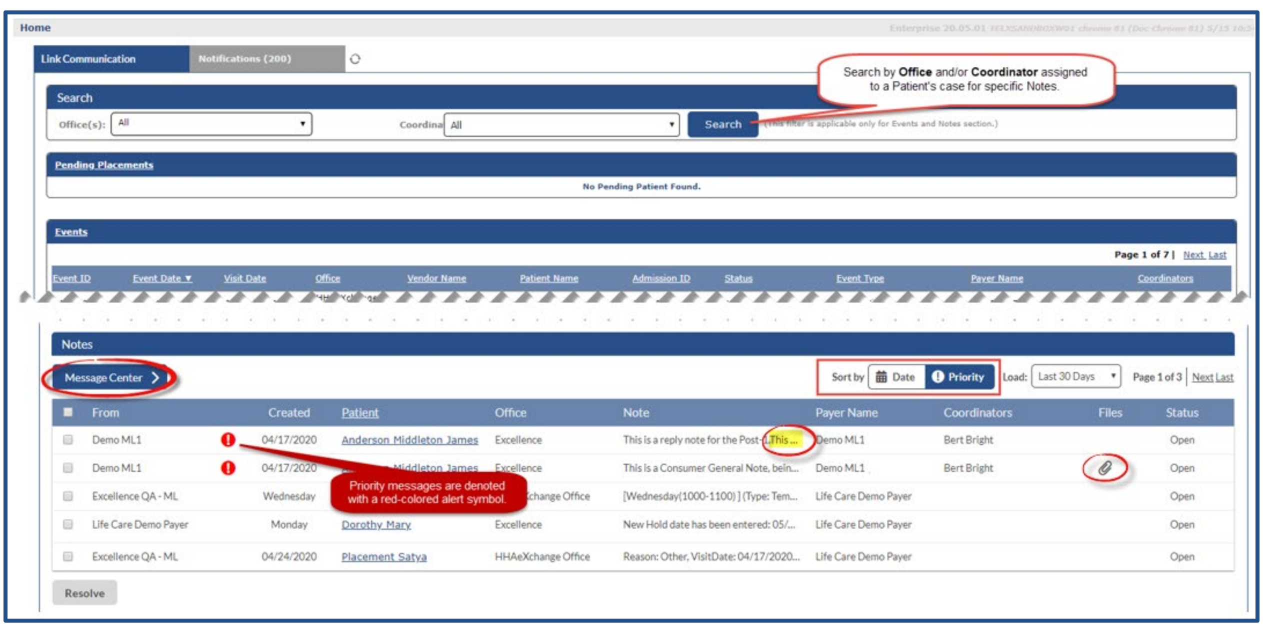
Home Module

Link Communication Tab

The **Link Communication** tab in the **Home** Module facilitates communication between an Agency and all its associated Payers (Linked Contracts). On this tab, Providers can view *Pending Placements* as well as *Notes* shared between the *Payer* and *Provider* systems.

Sections	Description
Pending Placements	New Patient cases are presented to Providers from an authorizing Payer as "Placements". Agencies are free to review the Patient's case before deciding whether to accept or reject it.
Notes	All communications between an Agency and the Payer pertaining to Linked Contract Patient cases. The HHAX system automatically creates a new **Note** for any changes applied to a Patient's Authorization, Patient Status, Discharge Date, and if a visit is marked as a Missed Visit.

On the Home page, the **Link Communication** tab (page) contains the four sections to include *Search*, *Pending Placements*, *Events*, and *Notes*, encased in blue headers (as illustrated in the following image).



Home: Link Communication Tab

In the *Notes* section:

- The **Sort by** feature allows users to sort messages by *Date* or by *Priority*. Priority messages are denoted with a red alert symbol.
- Notes exceeding the allowed width appear truncated on the grid. Click on any message to view the entire message via a popup viewer. Refer to the [Viewing Messages]() section.
- A paperclip icon under the **Files** column denotes an attachment to the Note.
- The **Message Center** button routes to the *Communications (Message Center)* page to view exchanges with Payers.

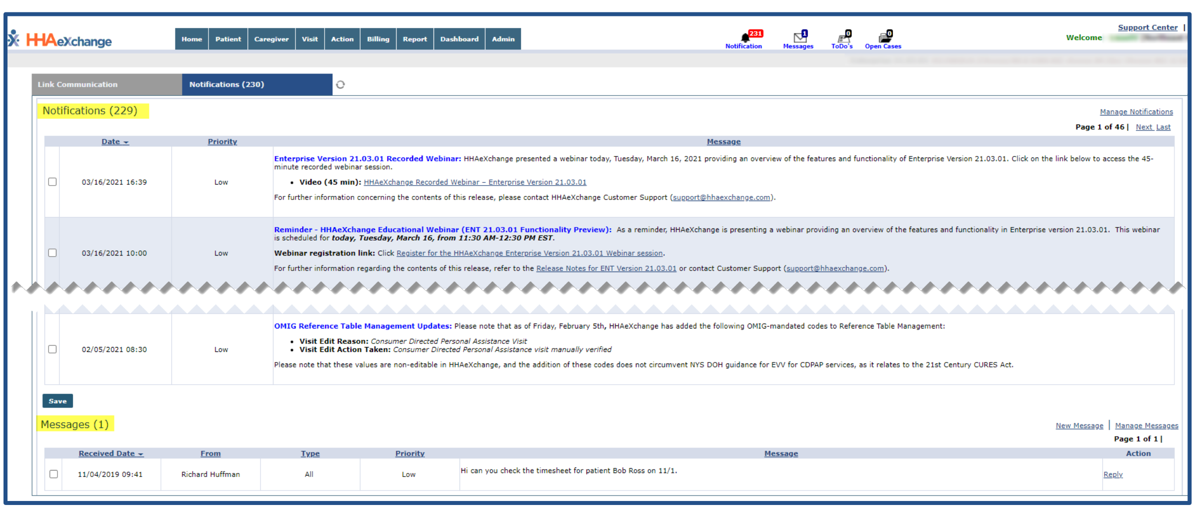
Note: *Hovering over the **From** column provides a tool tip indicating the message originator [Username, (Last Name, First Name)].*

Viewing Tooltip with Username Information

Notes can be viewed and managed directly from the Home page or from any of the Communications pages, using the **Status** column. Refer to the [Viewing Messages]() section for details and guidance.

Notifications Tab

The **Notifications** tab on the Home Module is comprised of three sections (described in the table below) used to handle communications from HHAeXchange, between internal employees, and all active Caregivers.



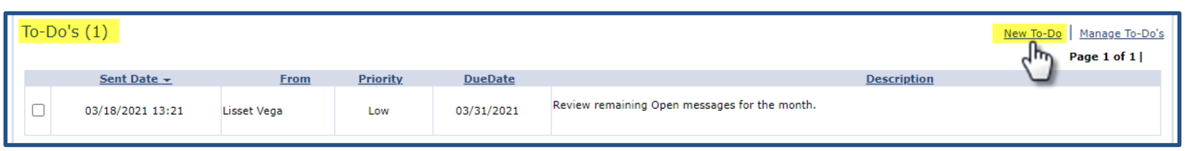
Home: Notifications Tab

Sections	Description
Notifications	(System Notifications) Messages from HHAeXchange announcing new functionality, changes in Homecare health regulations, or other miscellaneous information affecting an Agency or the HHAeXchange system.
Messages	Create and review internal messages as well as send messages to Caregivers via **Conexus**.
To-Do's	Messages sent between system users that include a "Due Date" component. Create reminders for self or other users (for example, a role group) with deadlines to complete tasks. Set recurring To-Do's if an action is required on a consistent schedule. Refer to the To-Do's section below.

Viewed notifications are removed from the Home page. To view past or viewed communications, use the **Manage Notifications**/**Manage Messages**/**To-Do's** links in each respective section. Refer to the Manage Notifications section below for details.

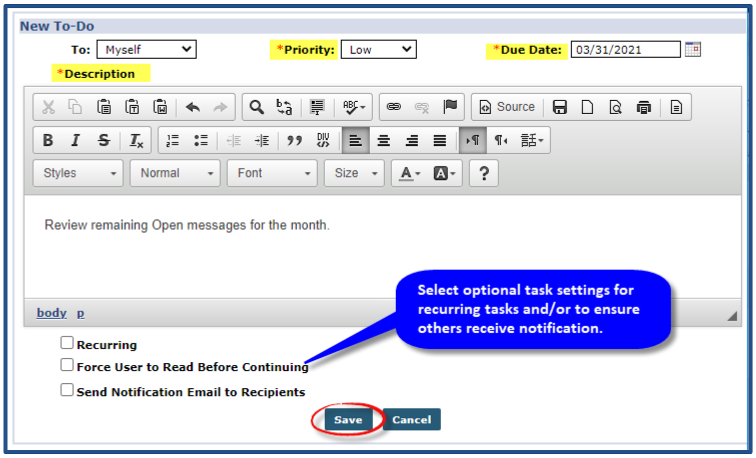
To-Do's

Create or send tasks for self and other users using the *To-Do's* section. Click on the **New To-Do** link (as seen in the following image) to create a task.



Notifications Tab: To-Do's Section

The *New To-Do* window opens. Select the recipient(s) in the **To** field (*Myself*, *Roles*, or *Users*). Select the **Priority**, **Due Date**, and enter a **Description** (all required as denoted by the red asterisk). Select optional task setting for recurring tasks and/or to ensure selected others receive notifications associated with the task. Click ***Save*** to finalize.

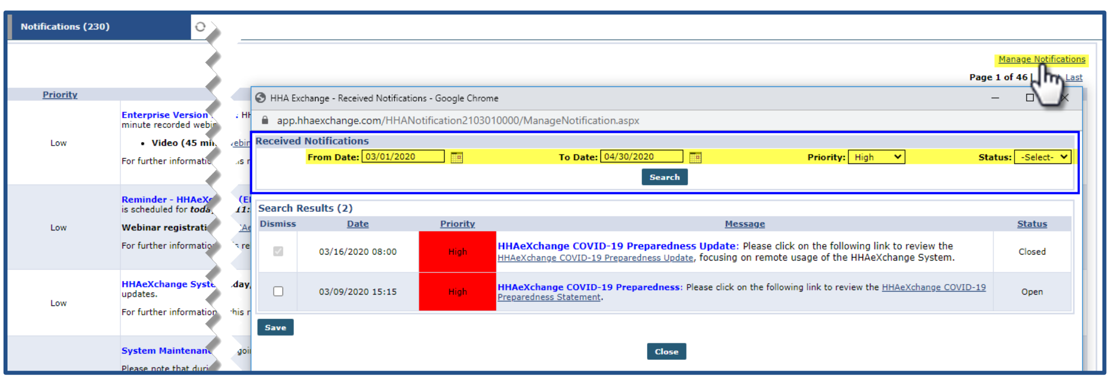


Creating a To-Do

The task then appears under the To-Do section (as illustrated in the first image in this section).

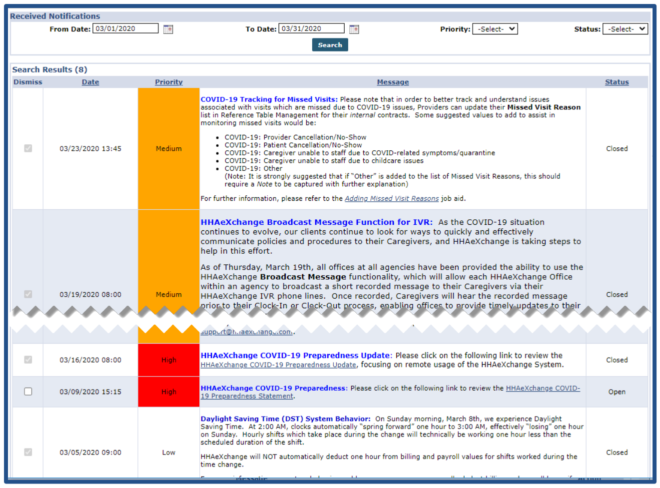
Manage Notifications

A Manage Notification link appears on each section at the top-right corner (as seen in the following image). Use the Manage Notifications to search for messages by entering a **From/To Date** range, **Priority**, and **Status**.



Manage Notifications: Link and Window

There are three Priority levels that can be assigned to messages: *High*, *Medium*, and *Low*. Under the **Priority** column, *High* priority messages appear in red, *Medium* in orange, and *Low* are not color-coded.



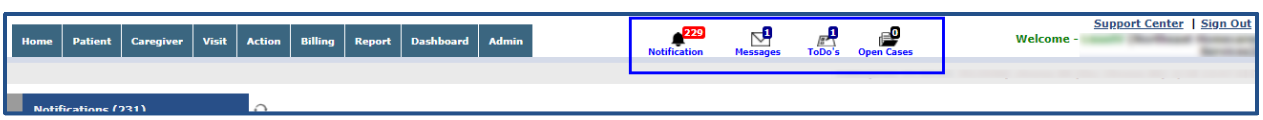
Priority Levels

Note: *This functionality applies to all sections in the Notifications tab.*

Alert Icons

The static Alert icons (with counters) seen at the top of the webpage to the right of the Navigation Panel (as illustrated below), are used to notify if and how many notifications/messages reside in each section at a given time.

In the image below, there are 229 **Notifications**, 1 **Message**, 1 **To-Do'**s, and 0 **Open Cases**. The **Open Cases Alert** icon reflects the number of Linked Contract Patient Placements that are pending placement.

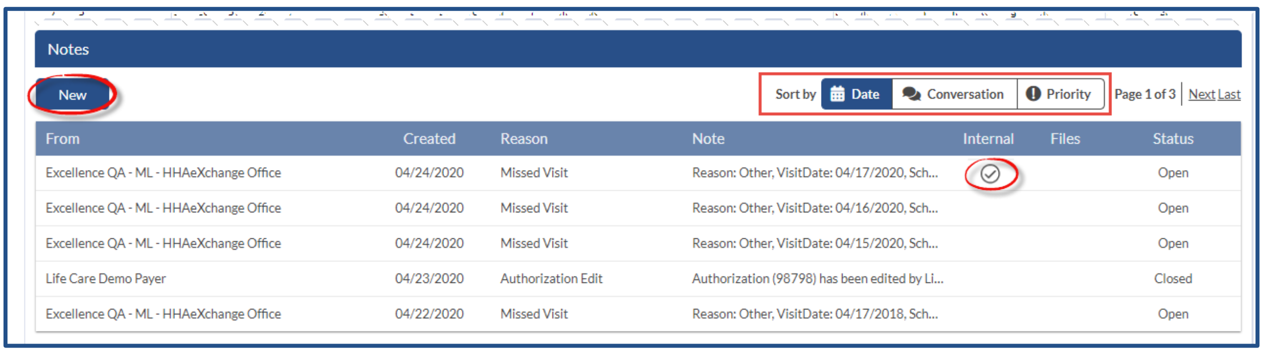


Alert Icons

Patient Notes

The functionality on the *Patient Notes* section (***Patient > General***) offers the same functionality described in the Home page. On this page there are minor differences, as follows:

1. Users can sort by *Date*, *Conversation*, and *Priority*. The **Conversation** mode allows users to view all replies to the original message. Refer to the Conversation Mode section for further details.
2. The **Patient** column does not display while an **Internal** column is visible. Notes with an encircled checkmark icon indicate that the Note is Internal (only applicable within the Agency).
3. Use the ***New*** button to add a new Patient note in the Patient *Notes* section. Refer to the Creating a Patient Note section (below) for instructions.



Patient Note Section

Creating a Patient Note

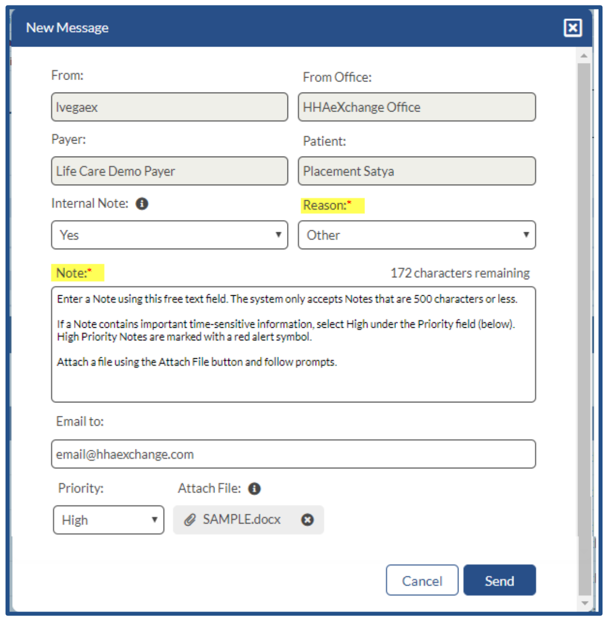
The **Patient Notes** functionality allows Payers and Providers to easily communicate regarding a specific Patient and any aspects of the Patient's care. Complete the steps below to create a Patient Note.

Step	Action
1	Navigate to **Patient > Patient Search** and select a Patient.
2	Click the **General** link on the Index.
3	Scroll to the *Notes* section to review all Notes pertaining to the Patient. Click the ***New*** button to create a new Note.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

The *New Message* window opens. The **From**, **From Office**, **Payer**, and **Patient** fields are pre-populated by the system, according to the Patient's information. Complete the remaining fields, as seen in the following image and described in the bulleted field and description list below.

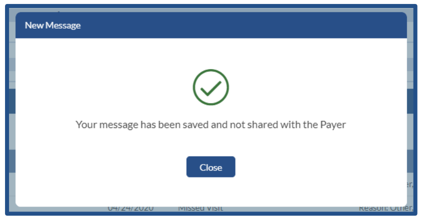
The **Reason** and **Note** fields are required (as denoted with a red asterisk). Click the ***Send*** button to send the message.



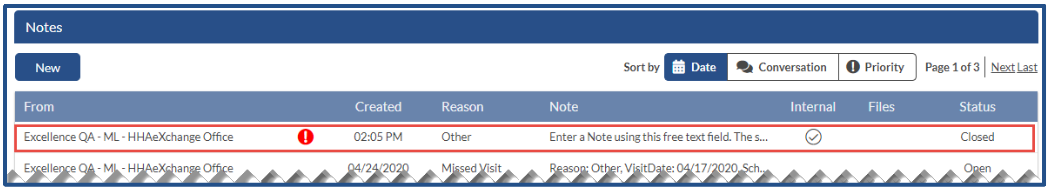
Patient - New Message

- **Internal Note**: By default, **No** is selected. Select **Yes** if the Note is applicable only within the Agency (not shared with the Payer).
- **Reason***: Select the "reason" or topic of the Note. Values for this dropdown are setup by the Payer (may vary from Patient to Patient). Refer to the Internal Patient Note Reasons for Linked Contracts section.
- **Note***: Enter the communication to send to the Payer.
- **Email to**: Enter an email address in this field to send the note directly to the specified address.
- **Priority**: By default, Normal is selected. Select High if the Note is of an urgent matter. Priority messages are denoted with a red alert symbol.
- **Attach File**: Click button and follow the system prompts to attach a supporting document to the Note. A paperclip icon indicates an attachment

</td></tr>
<tr><td>5</td><td>A confirmation window alerts of a successful send. Click Close to exit.</td></tr>
</table>

Step	Action
	 ***Note:*** *For this example, an Internal note was created. The confirmation alerts that this Note is not shared with the Payer.*

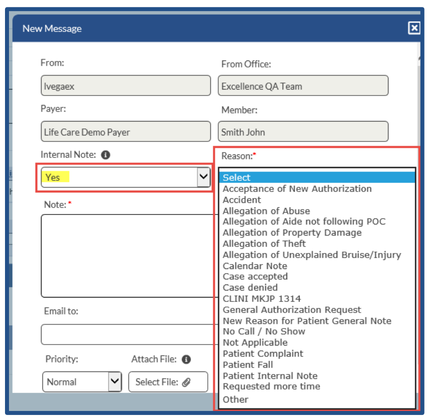
The Note appears in the Patient's General page, as illustrated below.



Newly Created Patient Notes

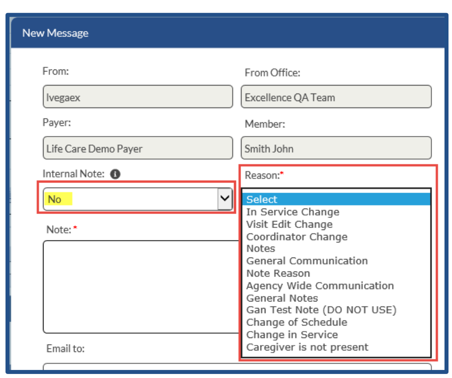
Internal Patient Note Reasons for Linked Contracts

Selecting ***Yes*** in the **Internal Note** field when creating a Patient Note provides a list of **Reasons** defined by the Provider (via the *Patient General Notes Reasons* Reference Table).



Patient General Page: Internal Note

Selecting ***No*** in the **Internal Note** field provides Note **Reasons** defined by the Payer under the Reasons field (via the *Notes Reasons* Reference Table).



Patient General Notes: New Non-Internal Note

Note: *This functionality also applies to the Notes section in the Communications Message Center page.*

Communications (Message Center) – Payer Communications

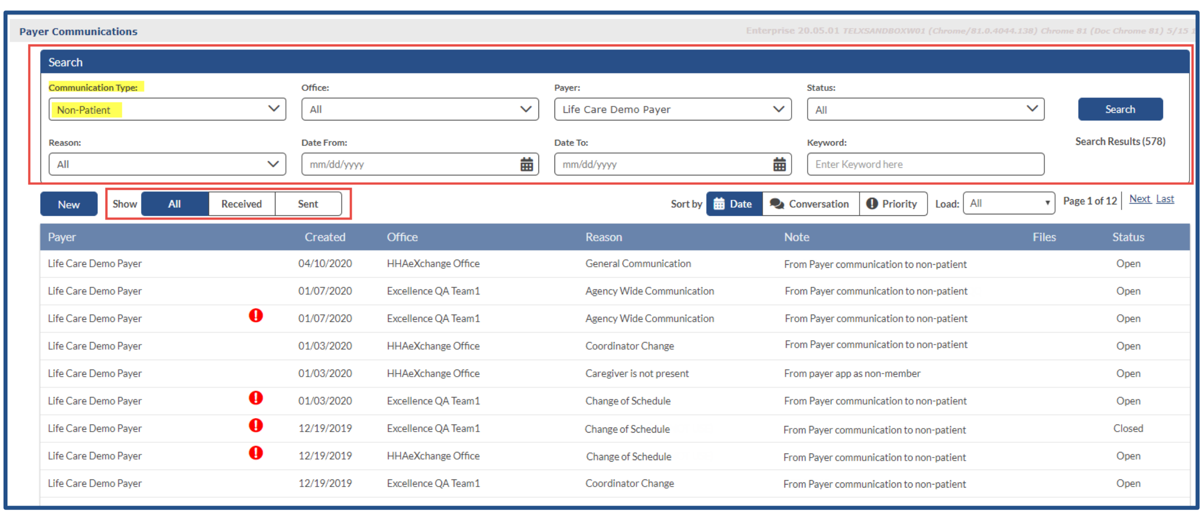
The *Communications (Message Center)* page allows Providers to communicate with Payers regarding items not directly related to an individual Patient. Using this function, Providers can create new communication notes, review/reply to open notes, and archive closed notes to Payers.

To access the **Communications (Message Center)** page, either:

- Click on the ***Message Center*** button (available on both the *Home* page and Member General Notes section); or
- Navigate to ***Action > Communications (Message Center)***.

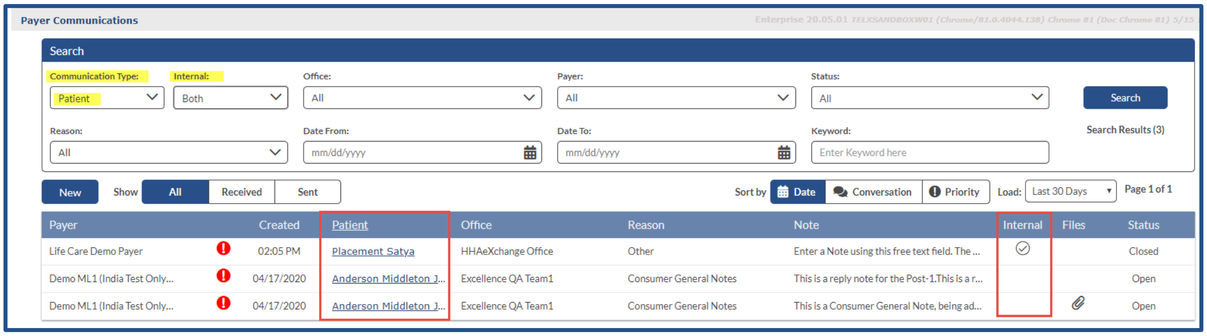
On this page, the search filters are encased as a section at the top of the screen. Upon accessing the page, *Non-Patient* is preselected in the **Communication Type** filter. On the **Show** field (to the right of the ***New*** button), choose to sort to view *All*, *Received*, or *Sent* messages.

On this page, the search filters are encased as a section at the top of the screen. Upon accessing the page, *Non-Patient* is preselected in the **Communication Type** filter. On the **Show** field (to the right of the ***New*** button), choose to sort to view *All*, *Received*, or *Sent* messages.



Communications Message Center Page

Selecting *Patient* in the **Communication Type** filter, an **Internal** search field becomes available. Refer to the table below for selection values for Internal. The **Patient** and **Internal** columns display. Internal messages (only to be seen by the Agency personnel) are indicated with an encircled checkmark (as seen in the following image). When *Non-Patient* is selected, the **Patient** and **Internal** columns are hidden (as seen in the image above).

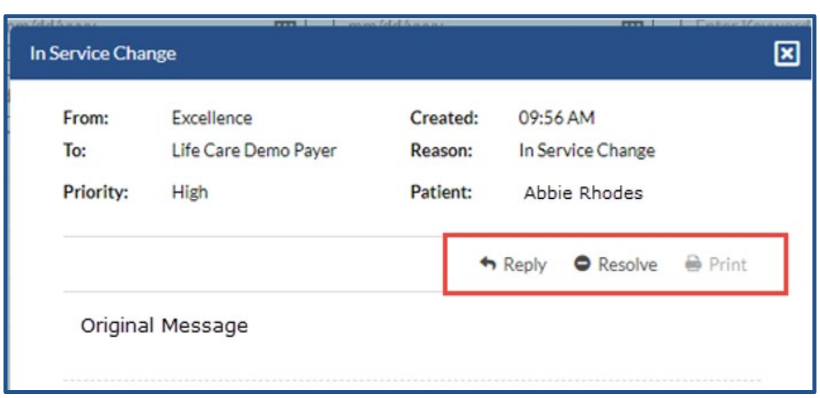


Message Center: Patient Internal Notes

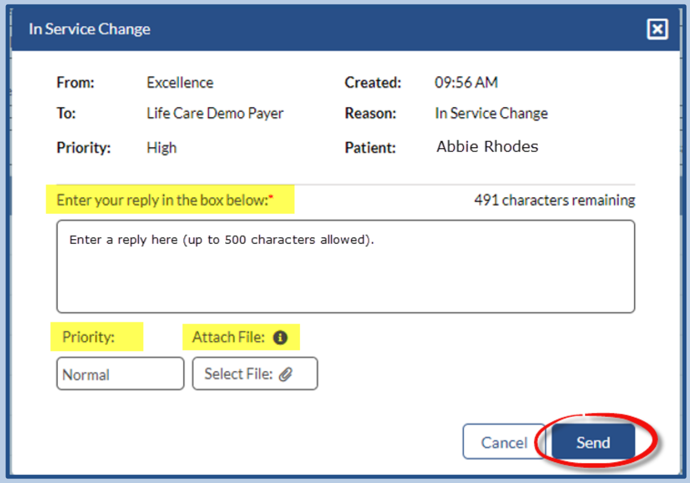
Value for "Internal" Field	Description
Both	(Default) Shows all Payer and Provider communications.
Yes	Shows only Provider communications for internal messages.
No	Shows only Payer communications.

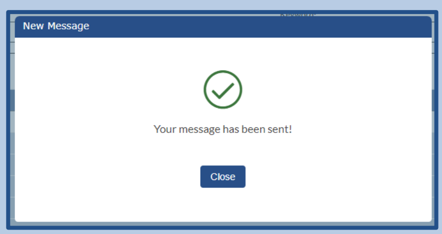
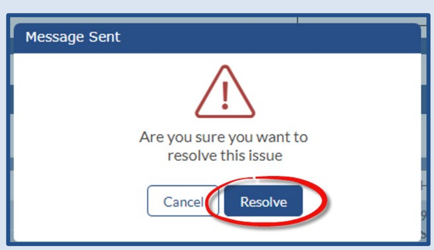
Viewing Messages

To view a message, click on the Note from the grid to open a popup window displaying the selected message. On the message popup, message details display to include **From**, **To**, **Created**, and **Reason**, as well as the message. Action buttons have been added to ***Reply***, ***Resolve***, or ***Print*** the message. The table below the image provides descriptions for each action.



Popup Message/Note Window

<table>
<tr><th>Action</th><th>Description/Select to…</th></tr>
<tr><td>Reply</td><td>Reply to a message. On the reply, users can select the Priority level and attach a file. Entering a note is required when selecting Reply. Enter up to 500 characters in the text box. Click Send to finalize.


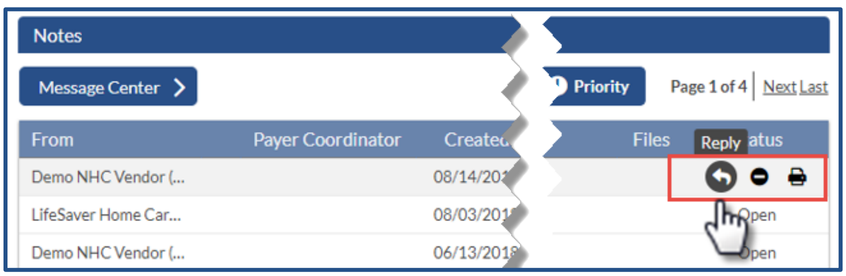
A confirmation alert indicates that the message was sent successfully. Click Close to exit the window.

</td></tr>
<tr><td>Resolve</td><td>Click Resolve to Close the Note. An alert prompts the user to confirm action. To confirm, click Resolve.


Upon clicking on Resolve, a Reopen alert window appears to further confirm to Close or reopen the message. Click Reopen to keep the message open.</td></tr>
</table>

Action	Description/Select to…
	
Print	Click ***Print*** and follow the system prompts to print the message.

Hover Buttons

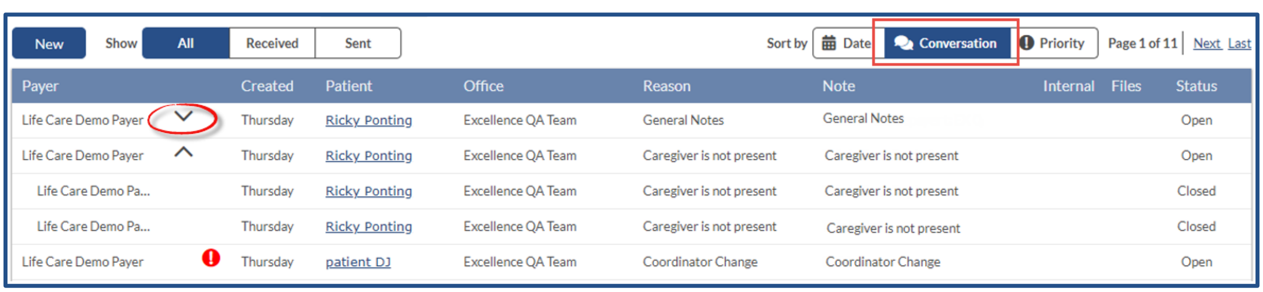
Hover buttons are available to facilitate ***Reply***, ***Resolve*** or ***Print*** directly from the message record (visible under the **Status** column when hovering over the row). Click on the desired icon to launch applicable action (as described in the table above).



Hover Buttons

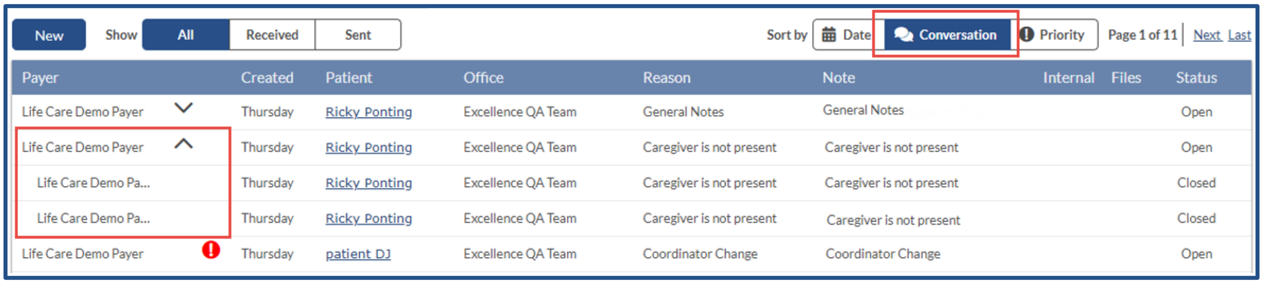
Conversation Mode

Clicking on the **Conversation** sorting method displays messages in *Conversation mode*. Messages with (down) arrows indicate a conversation thread.



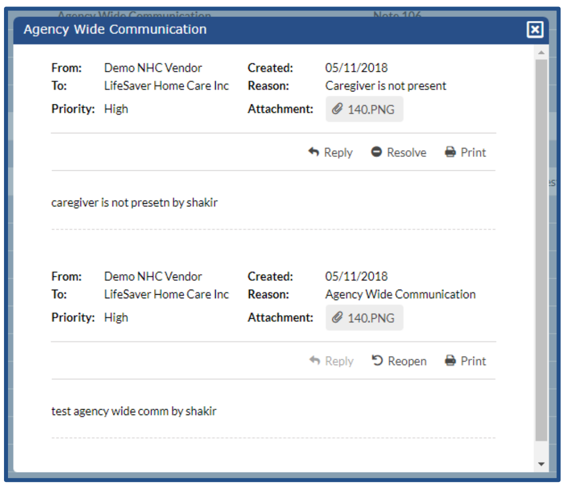
Conversation Mode

In this mode, click on the arrow to view all the responses to the original message. Response messages appear indented and the original message remains on the top. To collapse the messages, click the (up) arrow.



Conversation Messages

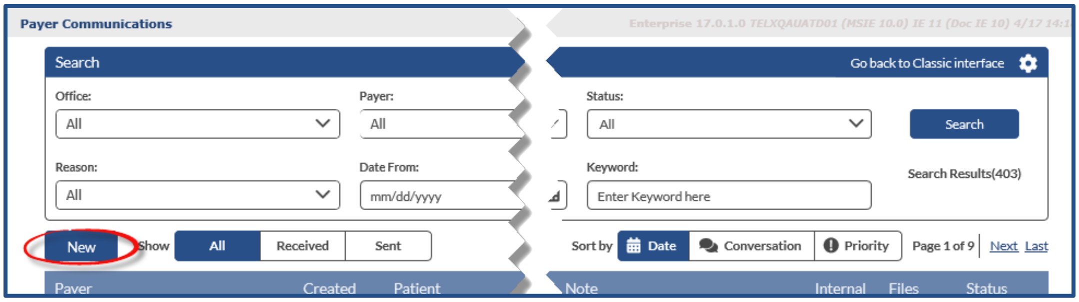
Clicking on any message in the conversation displays the thread of related messages in the conversation in a popup window.



Conversation Thread

Creating a New Message Via the Message Center

Both *Patient* and *Non-Patient* messages can be created from the Message Center. To create a message click the ***New*** button (as seen in the image below).

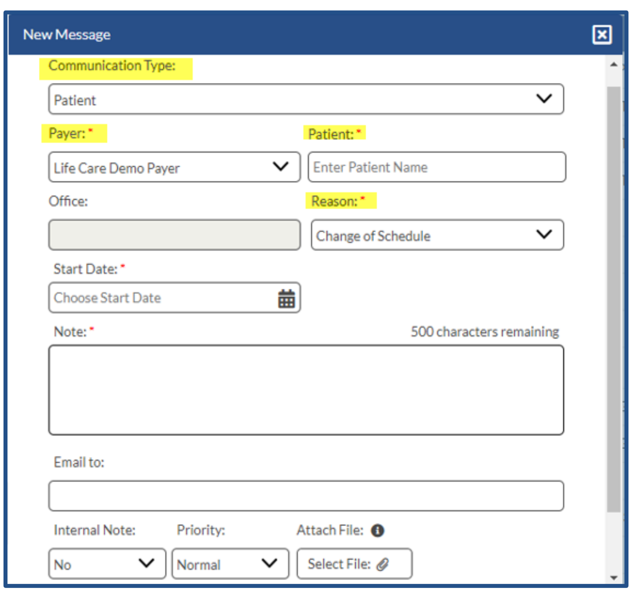


Creating a New Message

Patient – New Message

On the *New Message* window, select *Patient* from the **Communication Type** field. The **Payer**, **Patient**, **Reason**, and **Notes** fields are required (as denoted with a red asterisk). Note that all fields are auto-search and generate information as text is entered.

Depending on the **Reason** selected, other applicable (situational) fields are populated. For example, selecting *Change of Schedule* prompts user to select a **Start Date** (field). Complete the rest of the fields (**Internal**, **Priority**, and **Attach File**), as applicable. Click ***Send*** once complete.



New Message – Patient

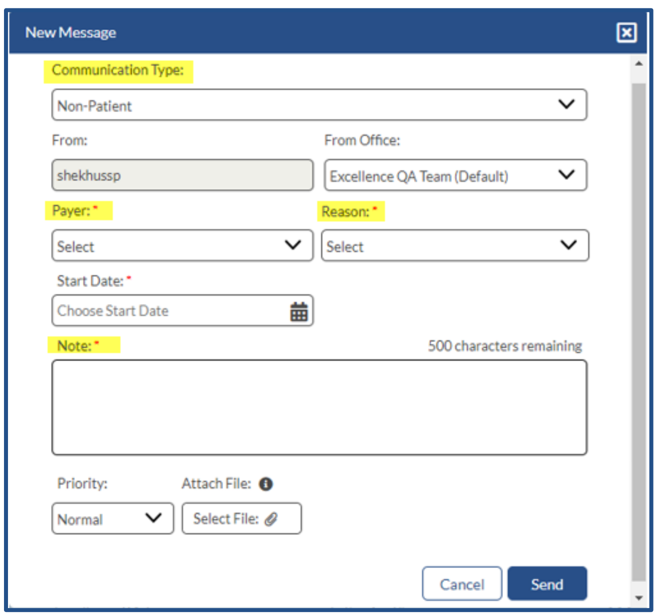
Note: *Patient Notes can also be created from the Patient's General page by clicking the **New** button in the Notes section.*

Non-Patient – New Message

As with the example above, the same functionality applies: All fields are auto-search and generate information as text is entered, additional fields may populate depending on the **Reason** selected, and fields denoted with a red asterisk are required.

On the *New Message* window, select *Non-Patient* from the **Communication Type** field. The **From** field is auto filled with the sender's username. In these messages, the **Payer**, **Reason**, and **Note** fields are required. The **Payer** field contains only the Payers linked with the selected Office.

Complete the rest of the fields (**Internal**, **Priority**, and **Attach File**), as applicable. Click ***Send*** once complete.



New Message – Non-Patient