# \* HAeXchange

# Enterprise New UI Crosswalk Provider User Guide



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## **Overview**

#### DISCLAIMER

The New UI functionality is enabled by HHAeXchange System Administration. Please contact <u>HHAX</u> <u>Technical Customer Care</u> for details, setup, and guidance.

This document covers the high-level changes made to the User Interface (UI) of the *Enterprise* system. The new screens include colors, buttons, and labels that now align with the HHAeXchange (HHAX) look that meets accessibility standards. While the look is new, most of the functionality across the system remains the same.

## Navigation (Top Menu)

The top navigation is the same consisting of *Home*, *Patient*, *Caregiver*, *Visit*, *Action*, *Billing*, *Report*, and *Admin* modules, as seen in the following image. The navigation menu remains static across the top to easily toggle between modules.

| X HHAeXchange                   | Home | Patient 🔻 | Caregiver 🔻 | Visit 🔻 | Action 🔻 | Billing 🔻 | Report 🔻 | Dashboards | Admin 🔫 |
|---------------------------------|------|-----------|-------------|---------|----------|-----------|----------|------------|---------|
| HHAeXchange Navigation Top Menu |      |           |             |         |          |           |          |            |         |

#### **User Info Section**

At the top-right corner of the navigation menu, click on the person icon to open the user information section. This section shows the **User** (*username*), the **Agency**, **Agency ID**, and the system environment. This section also displays the number of unread messages for the user under the **Message Center** and **System Notifications**.



Home Page – User Info Section

Under the *Need Help?* section, click *Support Center* to access the HHAeXchange Knowledge Base homepage offering needed assistance by way of documentation, videos, FAQs, and direct access to the Technical Customer Care section.

#### **Removal of Notification Badges**

The static action badges (as seen in the image below, for reference purposes) have been removed from the new UI.





Notification Badges in Classic UI



## **Home Page**

The system opens directly to the *Home* page, showing the **Username** at the top. In the new UI, the various sections are now under tabs rather than listed as sections in one page. The tabs include *Placements, Events, System Notifications, Direct Messages* (formerly *Messages*), *Tasks* (formerly *To-Do's*), and *Linked Communications*. The *Placements* tab opens by default.

| Hello Use       | ernam       | e            |              |                    |                 |              |                             |
|-----------------|-------------|--------------|--------------|--------------------|-----------------|--------------|-----------------------------|
| Placements (0 P | ending)     | Events       | System No    | otifications       | Direct Messages | Tasks        | Linked Communication        |
| Placement       | S           |              |              |                    |                 |              |                             |
| Pending (0)     | Accepted    | with Temp Ca | regiver (0)  | Staffed (0)        | Accepted with N | lo Master We | ek(0)                       |
| Parien***       | /\dr^issi^r |              | <b>0″ïce</b> | <u>(tar"Dat </u> ¢ | Stop Poter      |              | enrikter Sriskir Callageist |

#### **System Notification Alerts**

As customary in the classic system, System Notification alerts display upon successfully logging in. In the new format, all issued notifications appear with a right scroll to indicate multiple unread messages. From here, users can choose **Leave as Unread** or **Mark as Read and Close**.

| Date                | Priority | Message   |
|---------------------|----------|---|
| 01/03/2024<br>15:31 | Low      | <b>eMedNY Eligibility Process Delays:</b> The HHAeXchange system has detected delays to a number of eligibility batches submitted to eMedNY, today, January 3, 2024. These batches will remain in <i>Pending</i> status until a response is received from eMedNY. |
|                     |          |   |

System Notification Popup Window

Messages are moved to the *System Notifications* tab, where users can search for all notifications (in *Open* and *Closed* status).



|                  | Contract No. 10     |                 |   |              |  |                            |  |             |
|------------------|---------------------|-----------------|---|--------------|--|----------------------------|--|-------------|
| earch            | System Notification | S               |   |              |  |                            |  |             |
| ll               |                     | v               | All   | Ŧ            | mm/dd/yyyy                                   |                            | mm/dd/yyyy                                     |             |
|                  |                     |                 |   |              |  |                            |  |             |
| Search           |                     |                 |   |              |  |                            |  |             |
|                  |                     |                 |   |              |  |                            |  |             |
| ystem<br>Dismiss | Date                | <u>Priority</u> | Message   |              |  |                            |  | Bulk Action |
|                  | 01/03/2024 15:31    | Low             | eMedNY Eligibility Process Delays: The HHAeXchang         | pe system ha | s detected delays to a number of eligibility | batches submitted to eMedN | IY. today, January 3, 2024. These batches will | Open        |
| 0                |                     |                 | remain in Pending status until a response is received fro | om eMedNY.   | · · · · · · · · · · · · · · · · · · ·        |                            |  | open        |
| 0                | 01/02/2024 19:52    | High            | You have a new pending placement. Consult hom             | nepage for   | details.                                     |                            |  | Open        |
|                  |                     |                 |   |              |  |                            |  |             |

System Notifications Tab

#### **Other Key Differences Across the System**

Across the different modules, there are several key differences designed to meet accessibility standards. These differences include:

- Larger pages with spaced out fields and larger font provide more visibility. As with functionality, most fields have remained the same. Scroll to desired sections to view. Some pages or tables may require horizontal scrolling to view row details.
- Icons have replaced the various actions (formerly links or buttons) such as *Edit*, *Delete*, and *History*. Icons are blue over the white screen, as seen and described below.

| lcon       | Description   |
|------------|---|
|            | The Edit icon is a pencil icon, replacing most of the edit actions.   |
| T          | The Delete icon is a trash bin, replacing the red and white X icon (X).   |
| 5          | The History icon is a clock with a round back arrow.  |
| <b>b</b> - | The Upload (Attachment) icon appears as a page with an up arrow. The menu selection to right of the icon provides the option to <i>Upload a Document</i> or <i>View History</i> . |
| C          | The Update icon appears as a refresh icon (circular arrows).  |
| ₿          | The Print icon is a printer.  |

• Buttons are now larger and easier to read. Buttons may appear in blue or light blue to execute an action such as adding (as seen in the following top image). Red buttons appear to caution before proceeding, such as when deleting (as seen in the bottom image).

eXchange

| Authorizations             | horizations           | Add    | l Autho | rization |  |  |  |  |  |
|----------------------------|-----------------------|--------|---------|----------|--|--|--|--|--|
| Blue Action Button (Add)   |                       |        |         |          |  |  |  |  |  |
| Confirm Delet              | ion                   |        |         |          |  |  |  |  |  |
| Do you want to delete this | placement?            |        |         |          |  |  |  |  |  |
|                            | c                     | Cancel | Delete  |          |  |  |  |  |  |
| Red                        | Action Button (Delete | )      |         |          |  |  |  |  |  |

• **12-Hour Time Format:** Agencies can request to have the 12-Hour time format configured, rather than using the mandatory 24-Hour format used in the classic system.

| Schedule Time *         |         |    |    |
|-------------------------|---------|----|----|
| 07:00 PM O -            | 09:15 P | М  | O  |
| Temporary Schedule      | 07      | 13 | РМ |
| Plan of Care            | 08      | 14 | AM |
| Select                  | 09      | 15 |    |
| Include in Mileage      | 10      | 16 |    |
| Import Reference Number | 11      | 17 |    |
|                         | 12      | 18 |    |
|                         | 01      | 19 |    |

12-Hour Time Format

• **Dollar-Based Authorizations:** A **Dollars** authorization option has been added for Self-Direction Service Portal clients who do not bill in hours or units. A Dollar-Based Service Code must first be created before creating the authorization.



## **Patient Module**

The following image illustrates the Patient *Profile* page. In the new UI, the Patient header, located at the top of the page is large and encased in a blue section. The **Patient Name** is prominent in large white font, and status displays to the right of the name as a label. This header remains static while navigating in the Patient's entire profile.

The *Edit* button is now at the top of each page for easier access to edit information. The *Save* button remains at the bottom of the page.

On the Patent *General* page, the *Update Patient Status* button has been moved to the top, as seen in the image below.

| X HHAeXchange                         | Home Patient ✔ Caregiver ✔ Visit ✔ /           | Action 👻 Billing 👻 Report 👻 Admin 👻 |  |                           |                              | <b>±</b> - |
|---------------------------------------|--|-------------------------------------|--|---------------------------|------------------------------|------------|
| Anderson Sarah                        | Active   |                                     | Date of Birth<br>01/10/1971                          | Patient [ Alt ID ]<br>[ ] | E Admission ID<br>EXA-900014 |            |
| & Home Phone<br><u>173-747-2712</u> ▼ | Address <u>3965 52nd Street, WOODSIDE, NY </u> | 658 Languages<br>.11377             | 🗈 Contract<br>Alabama Care MCO, NY Care, Private Pay | 🙎 Coordinators<br>Daniel  | 意 Office<br>Expert Aides 4   |            |
| ♡ General                             | General  |                                     |  |                           | History Update Patient Stat  | us Edit    |
| Contracts                             | Nurse  | Coordinator<br>Daniel               | Coordinator 2  |                           | Coordinator 3                |            |
| 음 Profile                             | Caregivers with Mobile Patient Info Acc        | ess 0 0                             |  |                           |                              |            |
| <ul> <li>Eligibility Check</li> </ul> |  |                                     |  |                           |                              |            |
| 초 Auth/Orders                         | EVV Required<br>Yes                            |                                     | Service Request Start Dat<br>06/01/2023              | te                        | Projected Discharge Date     |            |
| * Special Requests                    | Disable automatic visit creation based o       | on EVV confirmation                 | Service Type   |                           |                              |            |

**Patient General Page** 

#### **Patient Office Move**

The *Office Move* section has been added to the Patient *General* page allowing agencies with multiple offices to move a Patient from one service office to another. Certain parameters apply. Please refer to the <u>Patient Office Move topic</u> for details.

| Office Move 👩        |                    |                |         |
|----------------------|--------------------|----------------|---------|
| Destination Office * |                    |                |         |
| Select               | ▼ Move             |                |         |
| Office Move History  |                    |                |         |
| Source Office        | Destination Office | Date Requested | Request |
|                      |                    | No Recor       | ds      |

**Patient Office Move Section** 



## **Caregiver Module**

As with the Patient module, the same changes have been applied to the Caregiver module. The following image illustrates the Caregiver *Profile* page displaying the Caregiver header and relocated *Edit* button.

| HHAeXchange               | Home Patient 🕶 Caregiver 🕶 Visit 🛩 Acti                            | on ✔ Billing ✔ Report ✔ Admin ✔ |  |                  |                        | <u>.</u>                        |
|---------------------------|--|---------------------------------|--|------------------|------------------------|---------------------------------|
| aregiver Fra              | anqui Active   |                                 | Date of Birth     01/01/1990                           | E Caregiver Code | 2/<br>9/               | Availability Updated<br>11/2023 |
| Home Phone<br>•555•5555 ▼ | ⊙ Address<br>130 West 42nd Street 2nd Floor<br>New York, NY, 10036 | ϰ Languages<br>                 | 聞 Provider (Office)<br>Expert Aides 4 (Expert Aides 4) | ử: Team<br>      | ©<br>HI                | Caregiver Hours<br>0   V 0      |
| Profile                   | Profile  |                                 |  |                  |                        |                                 |
| 5 Compliance              |  |                                 |  |                  |                        |                                 |
| Calendar                  | Demographics   |                                 |  |                  |                        |                                 |
| Visits                    |  | First Name<br>Franqui           | Middle Name  |                  | Last Name<br>Caregiver |                                 |
| In Service                |  | Initials                        | Gender   |                  | Date of Birth *        | 0 3                             |
| Rates                     |  | FC                              | Male   |                  | 01/01/1990             |                                 |
|                           | Caregiver Code *   | Alt.Caregiver Code              | Time & Att. PIN  |                  | Social Security Nu     | mber * 🟮 🕤                      |
| Notes                     | EVA 1013   |                                 | 100012   |                  | 111 12 2222            |                                 |

Caregiver Profile Page

The *Save* button appears at the top-right of the Profile after clicking the *Edit* button, as seen in the following image.



Caregiver Profile – Save Button

#### **Mobile App Settings Section**

The *Mobile App Settings* section in the Caregiver Profile varies depending on the configuration for the agency. Some agencies have been migrated to the newer HHAeXchange+ version while some are using the classic Caregiver Mobile App.

- In the classic version, the Caregiver provides a **Mobile ID** (issued by the app at registration) to the agency to link the app with the system.
- In the HHAeXchange+ version, the system generates an **Activation Code** and the agency sends to the Caregiver to link the app with the system.

Refer to the Linking Caregiver Profile with Mobile App topic for full details and instructions.

### Go (Next) Option Removed

The Go (to next) option (pictured below for reference) in the *Search* section of the left navigation panel has been removed from both the Patient and Caregiver pages.





Go to Next in Classic UI



## **Master Week Differences**

Several changes and have been applied to the Master Week function in the new UI, described in the following sub-sections.

#### **Recurrence Feature**

When adding a Master Week, the **Recurrence** feature has been added to the function, replacing the <u>Alt.</u> (alternate) link in the classic system.

| Add Master Week  | ٨dd Master Week      |  |  |               |                         |  |  |  |  |  |
|--|----------------------|--|--|---------------|-------------------------|--|--|--|--|--|
| All fields marked with an asterisk (*) are required.   |                      |  |  |               |                         |  |  |  |  |  |
| <ul> <li>If you know the Patient's permanent schedule will change at a specific date in the future (for example, Patient receives 3 days of service a week this month, but only 2 days a week next month), enter the first schedule range here.</li> <li>After saving, create another with the second schedule and second date range. The system will automatically switch the Patient to the second Master Week schedule on the configured date.</li> <li>Visits that are removed from the Masterweek, either through changing the frequency or by removing scheduled days of the week, does not remove visits that were already created from the Calendar page. These visits will have to be deleted manually from the Calendar page.</li> </ul> |                      |  |  |               |                         |  |  |  |  |  |
| From Date * mm/dd/yyyy   | To Date mm/dd/yyyy 🖸 | Recurrence         Image: Comparison of the second sec |  | Co            | py Previous Master Week |  |  |  |  |  |
| Monday   | Tuesday              | Wednesday  | Thursday                               | Friday        | Saturday                |  |  |  |  |  |
| Schedule Type 0 Daily Fixed  | ▼ Daily Fixed        | ▼ Daily Fixed  | Daily Fixed                            | ▼ Daily Fixed | Daily Fixed             |  |  |  |  |  |
| Hours  | ◎ · ···· · ◎ ···· ·  | •         •:•••         •         •:••         •         •:••  | ···· • • • • • • • • • • • • • • • • • | • • • •       | ···· 0 ···· (           |  |  |  |  |  |

Add Master Week – Recurrence Field

## **Hours Link**

The **Hours** link is now blue (formerly red font) and is used to apply hours and details to specific visits in the Master Week. Click the link to open the *Apply Hours & Details* window to make selections for specific days.

| Add Master We   | ek                      |                           |                         |                           |                           | ×                         |
|-----------------|-------------------------|---------------------------|-------------------------|---------------------------|---------------------------|---------------------------|
| 12/01/2023      | mm/dd/yyyy              | Every 1                   | Week(s)                 |                           |                           | Copy Previous Master Week |
|                 | Monday                  | Tuesday                   | Wednesday               | Thursday                  | Friday                    | Saturday                  |
| Schedule Type 🧕 | Daily Fixed 💌           | Daily Fixed 💌             | Daily Fixed 💌           | Daily Fixed *             | Daily Fixed 🔻             | Daily Fixed 💌             |
| Hours           | 10:00 AM 🕥 🕞 02:00 PM 🛇 | 10:00 AM () + 02:00 PM () | 10:00 AM O - 02:00 PM O | 10:00 AM () - 02:00 PM () | 10:00 AM () - 02:00 PM () |                           |
| care            | EXA-1016 Q              | EKA-1016 Q                | EXA-1016 Q              | EXA-1016 Q                | EXA-1016 Q                | Q                         |
| Caregiver Name  | Testeter Kemano         | Testeter Kemano           | Testeter Kemano         | Testeter Kemano           | Testeter Kemano           | -                         |
| Assignment ID   | 100016                  | 100016                    | 100016                  | 100016                    | 100016                    | *******                   |

Hours Link to Apply Hours and Details to a Master Week

### **Master Week Action Buttons**

The Master Week action buttons are now located above the schedule grid. From here, users can *Broadcast, Edit, Delete,* and view *History* for the Mater Week. The *Broadcast* icon offers the options to send a *Quick Broadcast* or send to *Matching Caregivers*.



### **Update Calendar Feature**

The **Update Calendar** button has been moved to the top-right of the Master Week for better visibility.



Master Week – Update Calendar Button

Clicking the *Update Calendar* button opens the *Update Calendar* window to apply the new date range to the Master Week. Click *Update* to save the changes.

| Update Calendar   | ×    |
|---|------|
| Updating the Calendar will update only unbilled visits                                      | ×    |
| Apply Master Week to the calendar for active Contracts in following date range: From Date * | the  |
| 01/09/2024  |      |
| To Date *   |      |
| 01/30/2024  |      |
| Cancel  | late |

**Update Calendar Window** 

Upon updating, the system alerts that the information has been saved, as seen in the following image.

| Master Week<br>Active Authorizations |            |           |         |            |     |     | The information has been saved and X<br>a rollover request has been<br>registered! |
|--------------------------------------|------------|-----------|---------|------------|-----|-----|--|
| Contract                             | Auth.<br># | From Date | To Date | Discipline | Sat | Sun | Remaining Notes Upload Doc<br>Auth.  |

Successful Master Week Update



Note: The system allows up to 30 days to apply a rollover.

#### **Expand/Collapse Master Week Details**

In the new UI, the Master Week displays in a collapsed manner for a cleaner look. To expand and display the schedule details, click the **+ Show Details** link.

| Master Week           |                    |                          |               |             |                 |                        |                     |
|-----------------------|--------------------|--------------------------|---------------|-------------|-----------------|------------------------|---------------------|
| Waster week           |                    |                          |               |             |                 |                        |                     |
| Active Authorizations | S                  |                          |               |             |                 |                        |                     |
| Contract Auth. F      | rom Date To Date D | Discipline Service Max A | uth. Type Per | iod Max Mon | Tue Wed Thu Fri | Sat Sun Remaining M    | lotes Upload Doc    |
|                       |                    |                          |               |             |                 |                        |                     |
| Master Week           |                    |                          |               |             |                 | History 👻 Update Caler | dar Add Master week |
| / /                   |                    |                          |               |             |                 |                        |                     |
| 09/01/23 - 🔊          | r 🗹 🔋 🔊            |                          |               |             |                 |                        |                     |
|                       | Monday             | Tuesday                  | Wednesday     | Thursday    | Friday          | Saturday               | Sunday              |
| Recurring every week  |                    |                          |               |             |                 |                        |                     |
| Schedule Type         | Daily Fixed        | Daily Fixed              | Daily Fixed   | Daily Fixed | Daily Fixed     |                        |                     |
| Hours                 | 1000-1400          | 1000-1400                | 1000-1400     | 1000-1400   | 1000-1400       |                        |                     |
| Caregiver             | Temp Temp,         | Temp Temp,               | Temp Temp,    | Temp Temp,  | Temp Temp,      |                        |                     |
|                       | 1000               | 1000                     | 1000          | 1000        | 1000            |                        |                     |
| + Show Details        |                    |                          |               |             |                 |                        |                     |
| 4                     |                    |                          |               |             |                 |                        | Þ                   |

Show Details Link to Expand View

To collapse the details, click the – **Hide Details** link.

|                                 | Monday                       | Tuesday     | Wednesday          | Thursday           | Frid        |
|---------------------------------|------------------------------|-------------|--------------------|--------------------|-------------|
| Recurring every week            |                              |             |                    |                    |             |
| Schedule Type                   | Daily Fixed                  | Daily Fixed | Daily Fixed        | Daily Fixed        | Daily       |
| Hours                           | 1000-1400                    | 1000-1400   | 1000-1400          | 1000-1400          | 1000        |
| Caregiver                       | Caregiver Temp Temp,<br>1000 |             | Temp Temp,<br>1000 | Temp Temp,<br>1000 | Tem<br>1000 |
| - Hide Details<br>Assignment ID | Assignment ID 010101         | 010101      | 010101             | 010101             | 0101        |
| Pay Code                        |                              |             |                    |                    |             |
| POC                             | 4620151                      | 4620151     | 4620151            | 4620151            | 4620        |
| Primary Bill To                 | NY Care                      | NY Care     | NY Care            | NY Care            | NY C        |
| Duration                        | 04:00                        | 04:00       | 04:00              | 04:00              | 04:0        |
| Service Code                    | PCA Hourly                   | PCA Hourly  | PCA Hourly         | PCA Hourly         | PCA         |
| Rate Type                       | Hourly                       | Hourly      | Hourly             | Hourly             | Hou         |
| Secondary Bill To               |                              | -           |                    | -                  |             |

Hide Details Link to Collapse View

## **Patient Calendar**

The Patient Calendar has some additions to include the *Add Weekly Variable Schedule* (specific to some markets) and *Add a Visit* button, located at the top-right of the calendar.

| Calendar      |                |          |                   | History Legend 🖶           |
|---------------|----------------|----------|-------------------|----------------------------|
| Month Year    | r              |          |                   |                            |
| January V 202 | 24 <b>v</b> Go | <u> </u> | Add Weekly Variab | Die Schedule Add a Visit 🔻 |
| Monday        | Tuesday        | Wea day  | Saturday          | Sunday                     |
| 1             | 2              | 3        | 6                 | 7                          |
|               |                |          |                   |                            |

Added features to the Patient Calendar

The *Add a Visit* button allows users to add multiple and recurring visits to the Patient's calendar.

|   | Add Weekly Variat | ole Schedule Add a Visit -   |
|---|-------------------|------------------------------|
|   |                   | Multiple Skilled Visits      |
|   | Saturday          | Multiple Non-Skilled Visits  |
| 6 |                   | Recurring Skilled Visits     |
|   |                   | Recurring Non-Skilled Visits |
| 1 |                   |                              |

Add a Visit Options

Icons have been added to the calendar date cells to showcase the *Schedule Type* (if applicable), *Duration, Visit Times, Billed*, and *Caregiver*. Other icons include copy and delete visit.



Icons in Calendar Cell



#### **Schedule Tab**

A **Schedule Type** field has been added to the visit *Schedule* tab. This feature is configured for certain markets. If the Variable Schedule feature is not used by an agency, then *Daily Fixed* is selected by default.

| Schedule       | Visit Info      | Billing Info        | Verification |                  |
|----------------|-----------------|---------------------|--------------|------------------|
| Schedul        | e               |                     |              |                  |
| All fields mai | rked with an as | terisk (*) are requ | iired.       |                  |
| Daily Fixed    | P~ •            |                     | *            |                  |
| Daily Fixed    |                 |                     |              |                  |
| Daily Variab   | le              |                     |              | Caregiver Code * |
| Weekly Vari    | able            |                     |              | 1000             |
| No Schedul     | e               |                     |              |                  |
| Tempora        | ary Schedule    |                     |              | Pay Code         |
|                |                 |                     |              | Select           |

Schedule Tab – Schedule Type Field

#### **Visit Info Tab**

The Last Visit Maintenance Date and EVV Auto Confirm Flag fields have been added to the Visit Info tab. The Last Visit Maintenance Date field displays the date when a visit is modified.

| Schedule Visit Info Billing Info Verification                    |  |                             |                           |
|--|--|-----------------------------|---------------------------|
| Visit Information  |  |                             | His                       |
| Scheduled Time ① 10:00 AM-02:00 PM Add Pre-Shift                 | TT/OT (hh:mm) 0 Add Post-Shift                   |                             | Missed Visit              |
| Visit Start Time          : O           01/03/2024               | Visit End Time          : Ø           01/03/2024 | Link Call                   |                           |
| Prebilling Problem(s)<br>Incomplete Confirmation, TEMP Caregiver |  | Last Visit Maintenance Date | EVV Auto Confirm Flag<br> |
| New Reason   | Action Taken                                     |                             |                           |

Visit Info Tab – Added Fields

## **Billing Info Tab**

The *Billing Info* tab (formerly *Bill Info*) works the same as in classic UI. The only difference is that fields are organized horizontally versus vertically.



| Schedule Visit Info Billing Info Verification |  |   |  |            |
|---|--|---|--|------------|
| Primary Bill                                  |  |   |  | History    |
| Primary Bill To<br>NY Care<br>TT/OT Hours 💿   | Service Code<br>PCA Hourly<br>Adjusted Hours | Bill Type<br>Hourly<br>Banked Minutes O | Service Hours<br>01:00<br>Billable Hours ()<br>01:00 |            |
| Billable Units                                | Bill Rates \$ 0.00                           | Total Bill Amount (Auto)<br>\$0.00      | <b>Billed</b><br>N                                   |            |
| Invoice #                                     | Invoice Batch #                              | Invoice Creation Date                   | Deleted Invoice Numbers                              |            |
| E-Billing Batch #<br>                         |  |   |  |            |
| Authorization (Auto)                          |  |   |  |            |
|   |  | Visit Schedule Units                    |  | -          |
|   |  |   |  | Close Save |

**Billing Info Tab** 



## **Call Dashboard**

On the *Call Dashboard* page, the various buckets are now organized in tabs (1). While all search filter fields are available to select criteria, only essential ones initially display. To see all search filter fields, click + Advanced Filters (2).

| Call Dashboard                     |                                       |   |                   |                |                          |
|------------------------------------|---------------------------------------|---|-------------------|----------------|--------------------------|
| Call Maintenance (1) Missed In (1) | Missed Out (0) Missed Call (2) Vi     | it Log Call Log Rejected Calls Corrections (0)  |                   |                |                          |
| Search Calls                       |                                       |   |                   |                |                          |
| Office(s)                          | Coordinator                           | From Date & Time                                |                   | To Date & Time |                          |
| All selected                       | - All                                 | * 01/10/2024                                    | • ···· 0          | 01/10/2024     | ···· 0                   |
| + Advanced Filters<br>Search       |                                       |   | חחחח              | Send M         | essage View Report       |
| Call Maintenance Calls (0)         | • • • • • • • • • • • • • • • • • • • | izviska datistik cik decik desizvik de da da da | . A ADINA A A A A | Cri            | eate Automatic Schedules |

Call Dashboard Tabs and Advanced Fields Link

On a search result, various icons are displayed indicating available options. In the classic system, a banner would pop up showing the schedule. In the new UI, click on the schedule icon to open the *Caregiver Schedule* window to view details.

| Call M         | Call Maintenance Calls (1)           Reprocess         Create Automatic Schedules |                       |                   |                                       |                                 |              |                              |                  |                   |                  | Schedules                 |        |
|----------------|---|-----------------------|-------------------|---------------------------------------|---------------------------------|--------------|------------------------------|------------------|-------------------|------------------|---------------------------|--------|
| Assign.<br>ID# | <u>Caregiver</u><br><u>Code</u>   | <u>Caregiver Name</u> | Office Name       | Caregiver Phone                       | <u>Caregiver</u><br><u>Team</u> | Patient Name | <u>Call Date</u><br><u>▼</u> | <u>Call Time</u> | <u>Call Type</u>  | <u>Caller ID</u> | <u>Status</u>             | Action |
| 100010         | 1010  | Franqui J 💼 💼         | Expert Aides<br>4 | Phone1 : 973-111-<br>1111<br>Phone2 : |                                 |              | 06/19/2023                   | 10:00 AM         | С <sup>и</sup> иі | ★ 609-947-3341   | Phone Number Not<br>Found | Reject |

**Caregiver Schedule Icon** 

Edit icons are also available on the *Caregiver Schedule* window to make necessary adjustments to resolve the issues for the call.

| Caregiver Schedule |     |                   |                   |                   |              |   |            | ×                   |       |      |         |
|--------------------|-----|-------------------|-------------------|-------------------|--------------|---|------------|---------------------|-------|------|---------|
| Caregiv<br>Code    | /er | Caregiver<br>Name | Patient<br>Number | Patient<br>Name   | Coordinators | Phone   | Visit Date | Schedule            | Visit | Link | Actions |
| 1010 [             | 2   | Franqui<br>Jon    | 900014            | Anderson<br>Sarah | Daniel       | 973-747-2712<br><sup></sup> <sup></sup> <sup></sup> <sup></sup> <sup></sup> <sup></sup> <sup></sup> | 06/19/2023 | 10:00 AM - 10:30 AM | đ     |      | ď       |
| ~~~                | ~~  | ~~~               | ,,,               | ~~~               | ,,,,         | ,,,,  | ~~~        | ~~~~~               | ~~~~  |      | ,,,,,   |
|                    |     |                   |                   |                   |              |   |            |                     |       |      | Close   |

#### **Caregiver Schedule Window**



## **User Management**

While functionality remains the same in the *User Account* page (*Admin > User Management > Search User*), some features such as **Change Password** and **Reset Password** are now more prominent, as buttons at the top-right of the page. In addition, fields are organized horizontally.

| pdate User Account  |           |      |                |      |                                |
|---|-----------|------|----------------|------|--------------------------------|
| All fields marked with an asterisk (*) are required.  |           |      |                |      | Change Password Reset Password |
| Username (Login ID) 🚯   | Status 🕕  | Last | Name *         |      | First Name *                   |
| 10000-000   |           | Ψ    |                |      | Andrew                         |
| E-mail *  | Role * () | Ope  | n Cases from 🜖 |      |                                |
| atate@hhaexchange.com   | Admin     | ▼ To | iday till 0-14 | days |                                |
| Pending Placement Notifications  Grant Access to Reporting Tool  Accept Unspecified Office Placements  Care Insights On Call User  Call for Selected Alert Priority  Select |           |      |                |      |                                |
| IP Restricted   |           |      |                |      |                                |
| Hourly Restricted 0   |           |      |                |      |                                |

Update User Account Page

The **IP Restricted** and **Hourly Restricted** fields are collapsed to save on screen space. To open these fields, select the applicable checkbox(es) to set restrictions when the fields become available, as seen in the following image.

| IP Restricted                                 |  |  |             |  |
|---|--|--|-------------|--|
| IP 1  |  | IP 2   | IP 3        |  |
| Hourly Restricted                             |  |  |             |  |
| Jser access can be restricted to cert<br>From | ain times of the day. Optiona<br><b>To</b> | lly, specific IP address can be restricted<br>IP Address | for access. |  |
| Monday  |  |  |             |  |
| Tuesday                                       |  |  |             |  |
| Wednesday                                     |  |  |             |  |
| Thursday                                      |  |  |             |  |
| Friday  |  |  |             |  |
|   |  |  |             |  |

#### **IP and Hourly Restricted Fields**



## **Office Setup**

In the *Edit Office* page, fields are organized horizontally. In the *General* section, several fields have been added to integrate new features, such as **Variable Schedule Types** and **Automatic Splitting of Overnight Shifts**.

|   |  | <u>His</u><br>Additional His  |
|---|--|---|
| Status                                    |  |   |
| Active 🔻                                  |  |   |
| Office Code *                             |  |   |
| AMS                                       |  |   |
| plication Form Setup to the office.       | Serviced Zip Codes<br>Enter Serviced Zip Codes   | Coundary Idealifica   |
| NPI NO.                                   | Agency ID (33D)  | Secondary Identifier  |
|   |  |   |
| Default Coordinator 🚯                     |  |   |
| Select v                                  |  |   |
| Automatic Splitting of Overnight Shifts 0 |  |   |
|   |  |   |
| F   | Status Active Active  Confine Code *  AMS  Silication Form Setup to the office.  NPI No. 0  Default Coordinator 0  Select  Automatic splitting of Overnight Shifts | Status       Active       Attive       Office Code *       AMS       Serviced Zip Codes       Enter Serviced Zip Codes       Default Coordinator @       Select |

Edit Office – Added Feature Fields

In the *Scheduling* section, the **Scheduling Alert for No Matching Authorization** feature has also been added.

|   | a a a a a a a a a a a a a a a a a a a                                     |
|---|---|
| Scheduling  |   |
| Allow Caregiver In-Service and Visit Overlaps 0         | Notify Caregivers via Text if Eligible for Open Shift w/o<br>Mobile App 0 |
| Allow Caregiver Absence and Visit/In-Service Overlaps 0 | Calculate and Pay Off Duty Time (ODT) 0                                   |
| Display MD Order Aide Tab as                            | _   |
| 🔘 Duty Code View 🟮 🔵 Order/Goal View 🏮                  | Automatically adjust schedule to match confirmation times                 |
| Master Week Rollover Time Frame 🚯                       |   |
| 21 Days   | Auto-Approve Patient Schedule Changes for Consumer Directed 0             |
| Scheduling Alert for No Matching Authorization 0        | Authorization Utilization Threshold Alert 0                               |
| Allowed Address Types * 🕚                               |   |
| 2 of 4 selected 🔹                                       | Automatically adjust for Daylight Savings Time 0                          |
|   |   |

Edit Office – Scheduling – No Matching Authorization Field