



# Enterprise New UI Crosswalk

Provider User Guide

# Table of Contents

- Overview..... 1**
- Navigation (Top Menu)..... 2**
  - User Info Section..... 2
  - Removal of Notification Badges..... 2
- Home Page..... 4**
  - System Notification Alerts ..... 4
  - Other Key Differences Across the System ..... 5
- Patient Module ..... 7**
  - Patient Office Move ..... 7
- Caregiver Module ..... 8**
  - Mobile App Settings Section ..... 8
  - Go (Next) Option Removed..... 8
- Master Week Differences ..... 10**
  - Recurrence Feature..... 10
  - Hours Link ..... 10
  - Master Week Action Buttons..... 10
  - Update Calendar Feature..... 11
  - Expand/Collapse Master Week Details..... 12
- Patient Calendar..... 13**
  - Schedule Tab ..... 14
  - Visit Info Tab ..... 14
  - Billing Info Tab ..... 14
- Call Dashboard ..... 16**
- User Management..... 17**
- Office Setup ..... 18**

## Overview

### DISCLAIMER

The New UI functionality is enabled by HHAExchange System Administration. Please contact [HHAX Technical Customer Care](#) 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)

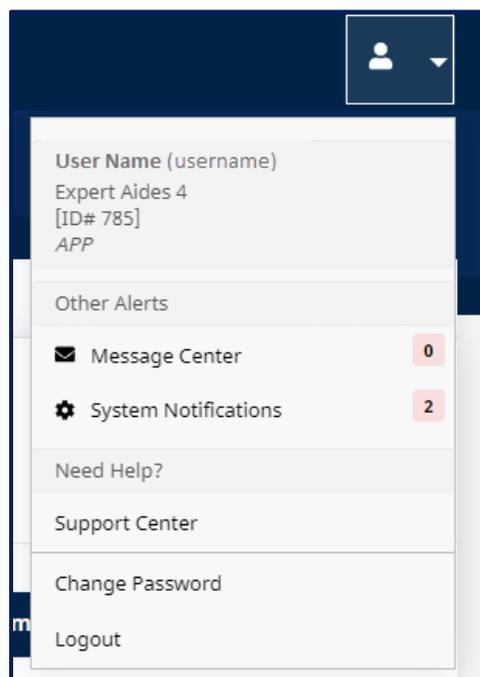
The top navigation is the same consisting of *Home, Patient, Caregiver, Visit, Action, Billing, Report, and Admin* modules, as seen in the following image. The navigation menu remains static across the top to easily toggle between modules.



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

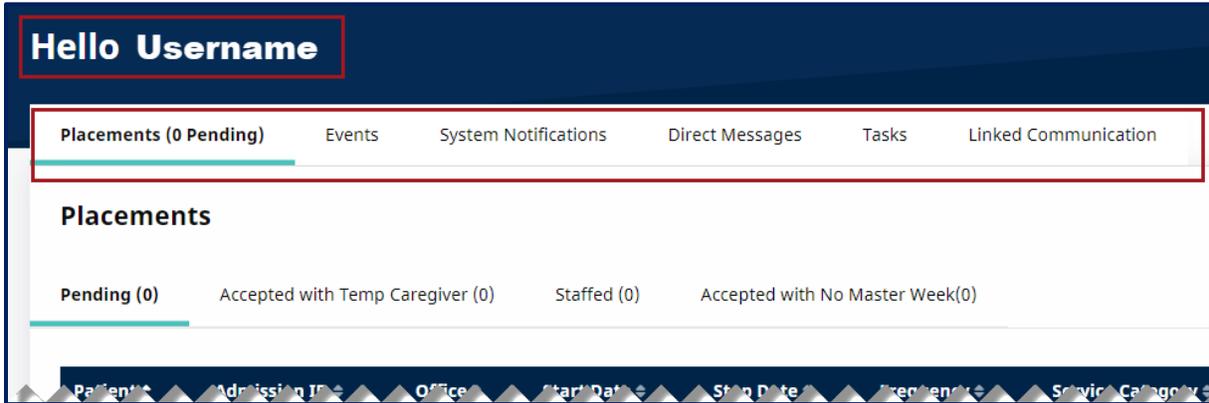
The static action badges (as seen in the image below, for reference purposes) have been removed from the new UI.



Notification Badges in Classic UI

## Home Page

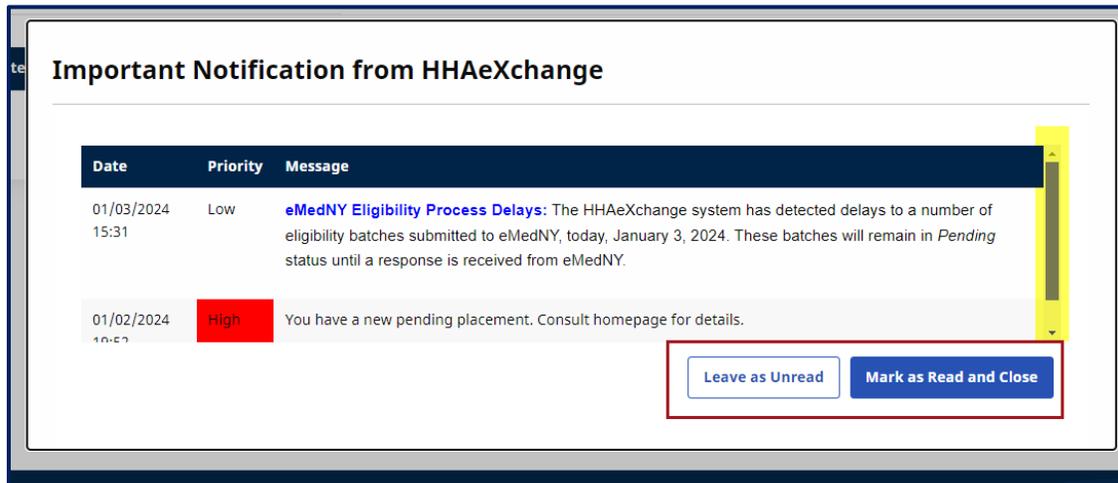
The system opens directly to the *Home* page, showing the **Username** at the top. In the new UI, the various sections are now under tabs rather than listed as sections in one page. The tabs include *Placements*, *Events*, *System Notifications*, *Direct Messages* (formerly *Messages*), *Tasks* (formerly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



Homepage Tabs

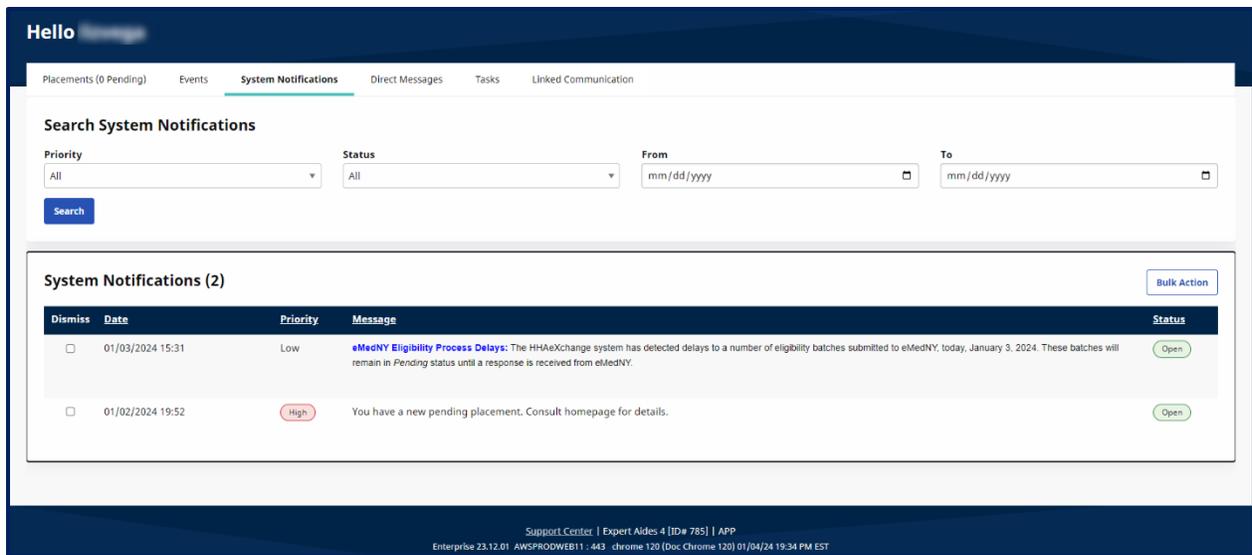
## System Notification Alerts

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**.



System Notification Popup Window

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



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.

Icon	Description
	The Edit icon is a pencil icon, replacing most of the edit actions.
	The Delete icon is a trash bin, replacing the red and white X icon (✘).
	The History icon is a clock with a round back arrow.
	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> .
	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).

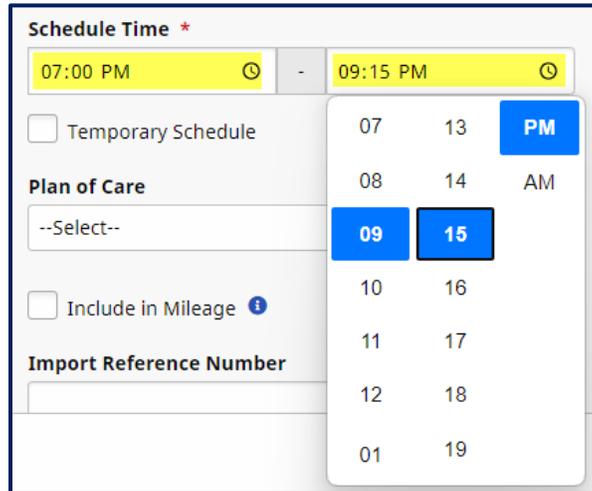


Blue Action Button (Add)



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.



12-Hour Time Format

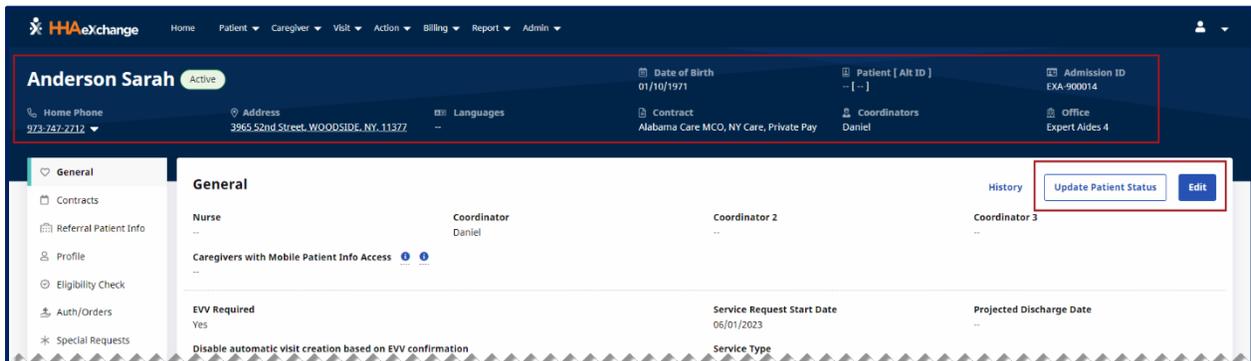
- Dollar-Based Authorizations:** A Dollars authorization option has been added for Self-Direction Service Portal clients who do not bill in hours or units. A Dollar-Based Service Code must first be created before creating the authorization.

## 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.

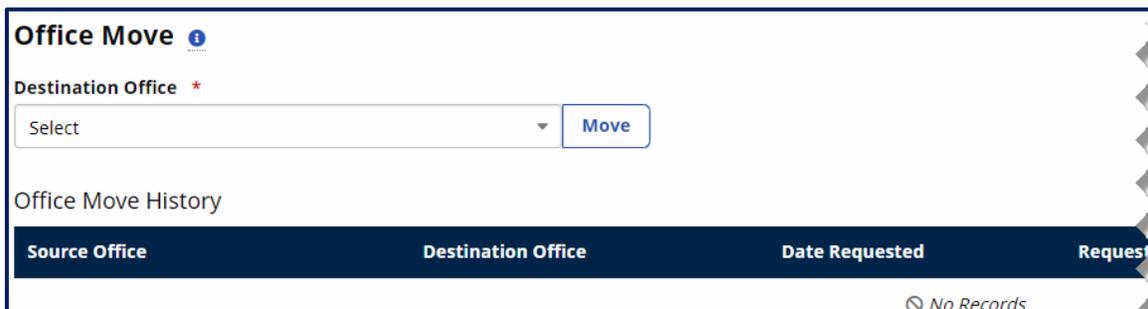
On the Patient *General* page, the **Update Patient Status** button has been moved to the top, as seen in the image below.



Patient General Page

## Patient Office Move

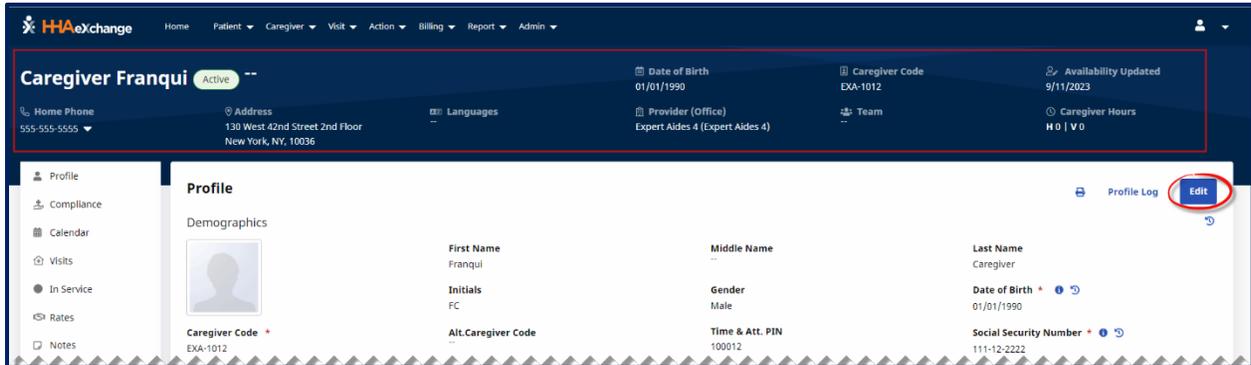
The *Office Move* section has been added to the Patient *General* page allowing agencies with multiple offices to move a Patient from one service office to another. Certain parameters apply. Please refer to the [Patient Office Move topic](#) for details.



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.



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

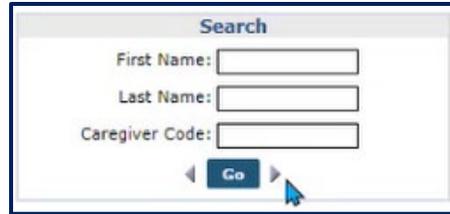
The *Mobile App Settings* section in the Caregiver Profile varies depending on the configuration for the agency. Some agencies have been migrated to the newer HHAExchange+ version while some are using the classic Caregiver Mobile App.

- 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.



A screenshot of a search form titled "Search". The form contains three input fields: "First Name:", "Last Name:", and "Caregiver Code:". Below the fields is a blue "Go" button with left and right arrow icons. A mouse cursor is pointing at the "Go" button.

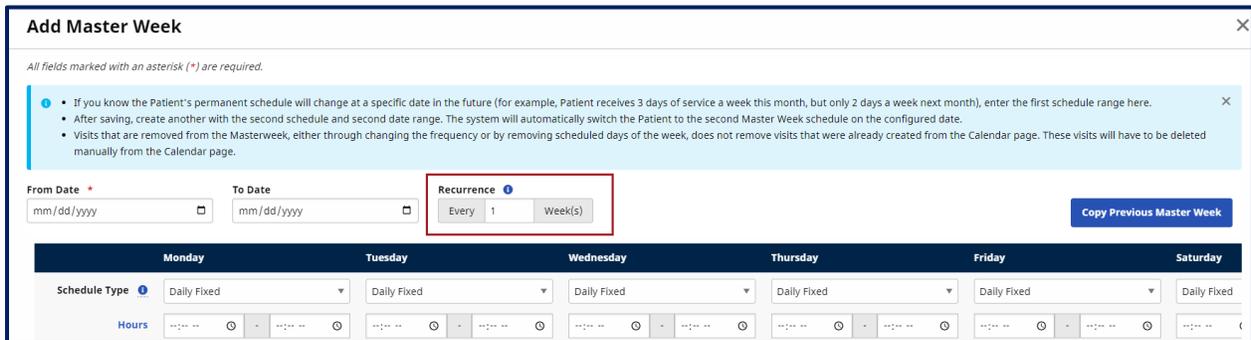
Go to Next in Classic UI

# Master Week Differences

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

## Recurrence Feature

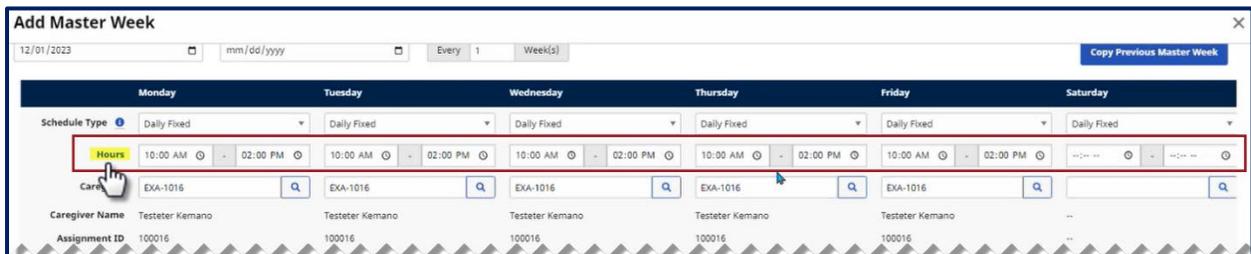
When adding a Master Week, the **Recurrence** feature has been added to the function, replacing the Alt. (alternate) link in the classic system.



Add Master Week – Recurrence Field

## Hours Link

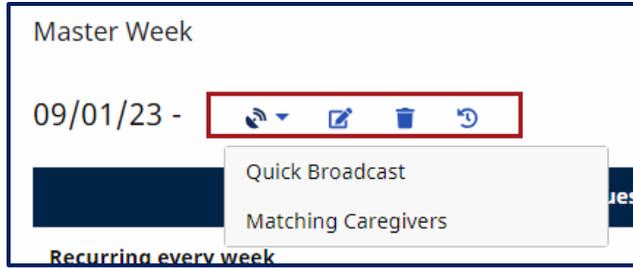
The **Hours** link is now blue (formerly red font) and is used to apply hours and details to specific visits in the Master Week. Click the link to open the *Apply Hours & Details* window to make selections for specific days.



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 Master Week. The *Broadcast* icon offers the options to send a *Quick Broadcast* or send to *Matching Caregivers*.



Master Week Action Icons

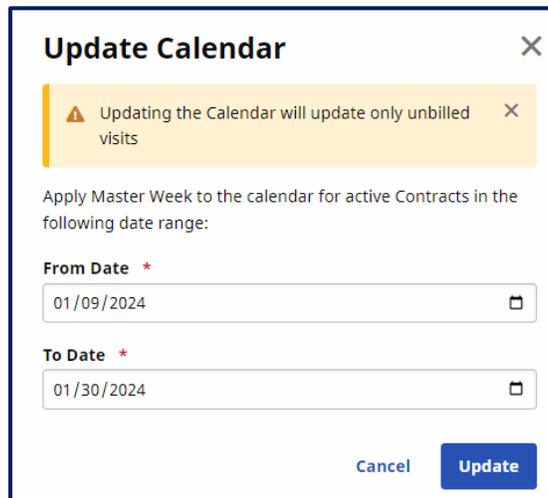
## Update Calendar Feature

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 Window

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

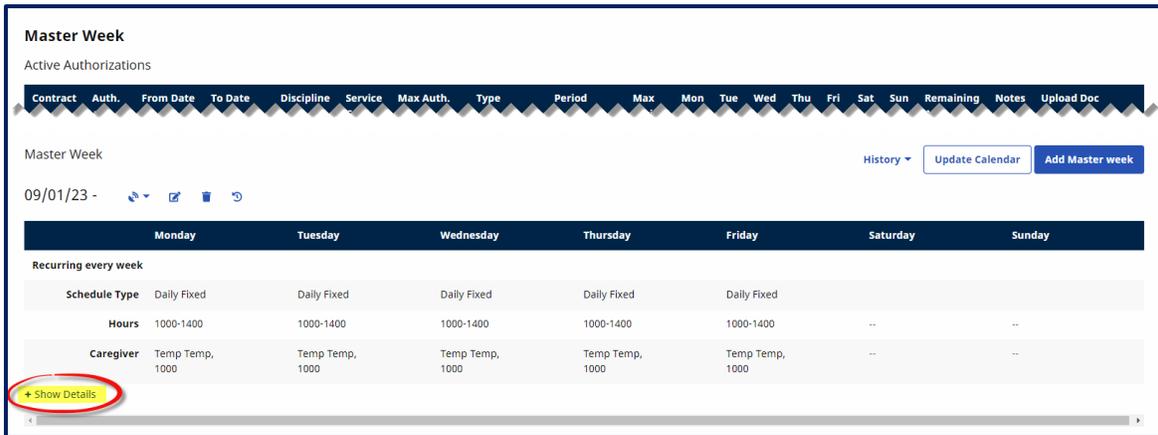


Successful Master Week Update

**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.



Show Details Link to Expand View

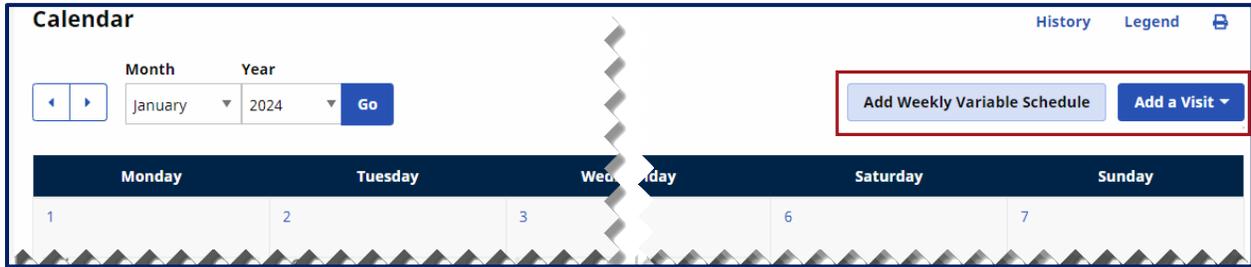
To collapse the details, click the **- Hide Details** link.



Hide Details Link to Collapse View

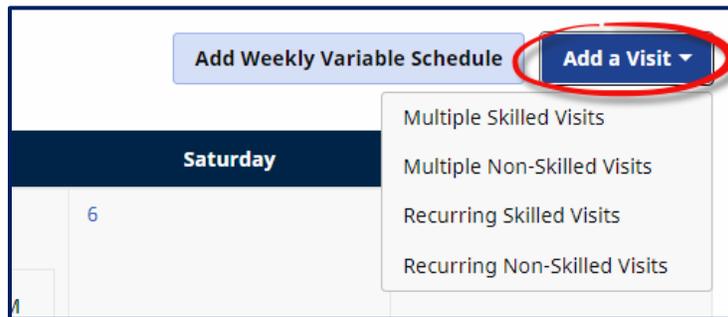
# Patient Calendar

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.



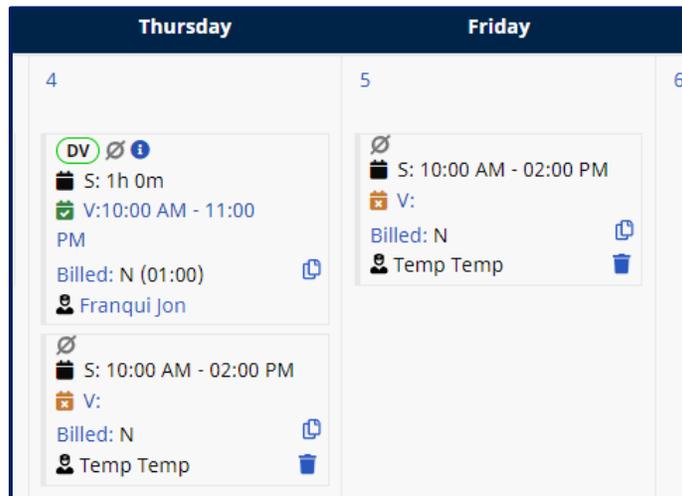
Added features to the Patient Calendar

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



Add 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.

The screenshot shows the 'Schedule' tab in a web application. At the top, there are four tabs: 'Schedule', 'Visit Info', 'Billing Info', and 'Verification'. The 'Schedule' tab is active. Below the tabs, the heading 'Schedule' is followed by a note: 'All fields marked with an asterisk (\*) are required.' The 'Schedule Type' field is a dropdown menu currently showing 'Daily Fixed'. The dropdown menu is open, listing the following options: 'Daily Fixed', 'Daily Variable', 'Weekly Variable', and 'No Schedule'. Below the dropdown is a checkbox for 'Temporary Schedule'. To the right of the dropdown, there are two input fields: 'Caregiver Code' with the value '1000' and 'Pay Code' with a '--Select--' dropdown.

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.

The screenshot shows the 'Visit Info' tab in a web application. At the top, there are four tabs: 'Schedule', 'Visit Info', 'Billing Info', and 'Verification'. The 'Visit Info' tab is active. Below the tabs, the heading 'Visit Information' is followed by a note: 'All fields marked with an asterisk (\*) are required.' The 'Scheduled Time' field shows '10:00 AM-02:00 PM' with 'Add Pre-Shift' and 'Add Post-Shift' buttons. The 'TT/OT (hh:mm)' field is empty. There is a 'Missed Visit' checkbox. The 'Visit Start Time' and 'Visit End Time' fields both show '01/03/2024' with calendar icons and a 'Link Call' button. The 'Prebilling Problem(s)' field shows 'Incomplete Confirmation, TEMP Caregiver'. The 'New Reason' and 'Action Taken' fields are dropdown menus with 'Select' as the current value. A red box highlights two new fields: 'Last Visit Maintenance Date' and 'EVV Auto Confirm Flag', both currently showing '...'.

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**  
NY Care

**TT/OT Hours** ⓘ  
--

**Billable Units**

**Invoice #**  
--

**E-Billing Batch #**  
--

**Authorization** (Auto)  
Authorization Not Required

**Service Code**  
PCA Hourly

**Adjusted Hours** ⓘ

**Bill Rates**  
\$ 0.00

**Invoice Batch #**  
--

**Bill Type**  
Hourly

**Banked Minutes** ⓘ

**Total Bill Amount (Auto)**  
\$0.00

**Invoice Creation Date**  
--

**Visit Schedule Units**

**Service Hours**  
01:00

**Billable Hours** ⓘ  
01:00

**Billed**  
N

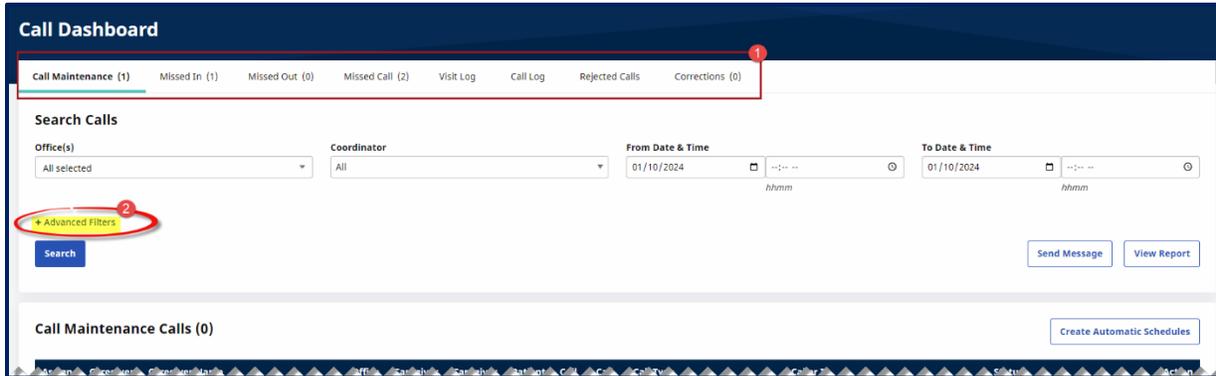
**Deleted Invoice Numbers**  
--

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 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.

Assign. ID#	Caregiver Code	Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	Action
100010	1010	Franqui Jon	Expert Aldes 4	Phone1 : 973-111-1111 Phone2 :			06/19/2023	10:00 AM	IN	609-947-3341	Phone Number Not 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 Code	Caregiver Name	Patient Number	Patient Name	Coordinators	Phone	Visit Date	Schedule	Visit	Link	Actions
1010	Franqui Jon	900014	Anderson Sarah	Daniel	973-747-2712	06/19/2023	10:00 AM - 10:30 AM			

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.

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.

	From	To	IP Address
Monday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tuesday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wednesday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Thursday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Friday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Saturday	<input type="text"/>	<input type="text"/>	<input type="text"/>

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**.

**Edit Office – Added Feature Fields**

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

**Edit Office – Scheduling – No Matching Authorization Field**