



# Release Notes

Enterprise Version 23.06.01

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## Overview

These release notes contain a high-level overview of any updates and/or new functionality introduced to the HHAExchange Enterprise software. As HHAExchange is permission-based, not all functionality is available for every role within an Agency. Further inquiry concerning the contents of this document should be directed to [HHAExchange Customer Support](#).

## Refresh Bookmarks

If using bookmarks to directly access the HHAExchange Login Page, please update to <https://app.hhaexchange.com/hhax/Login.aspx> to ensure access to the latest version of the HHAExchange platform.

## Release Notes Summary

To view a history of Release Notes and featured epics, refer to the [Release Notes Summary](#) providing approximately 2 years of archived releases.

## Digital Applicant Onboarding (DAO)

### DISCLAIMER

The **Digital Applicant Onboarding (DAO)** feature is activated by HHAX System Administration. Please contact [HHAX Expansion Sales](#) for further information.

The **Digital Applicant Onboarding (DAO)** function within the HHAeXchange (HHAX) application streamlines the conversion of Applicants into Caregivers through the Agency-configured Caregiver Applicant Portal.

With this feature, Providers control certain DAO setups, such as establishing application forms, unique workflows, and theme-related settings for the Caregiver Applicant Portal. The function simplifies the process of gathering Caregiver applications digitally through the Caregiver Applicant Portal, while tracking application processes and hiring procedures in the Provider application. Ultimately, successful Applicants are converted into Caregivers when relevant documentation and interviews have been completed.

Refer to the [Digital Application Onboarding Process Guide](#) for further information and feature details.

## Provider BI Dashboards

### DISCLAIMER

The **BI Dashboards** feature is activated by HHAX System Administration. Please contact [HHAX Expansion Sales](#) for further information.

A **Dashboard** is a collection of components (*cards, widgets, and filters*) that enable users to visualize and gauge key performance indicators (KPIs) from a centralized location. Information is organized according to business function or business unit (for example, Sales, Operations, and Systems).

Through a series of clicks, users can quickly view metrics and examine the data behind what is generating the information (from high-level to specific details). There are various functional commonalities from one dashboard to another.

Refer to the [Provider Dashboards Process Guide](#) for further information and feature details.

## E-Billing Windows Enhancements

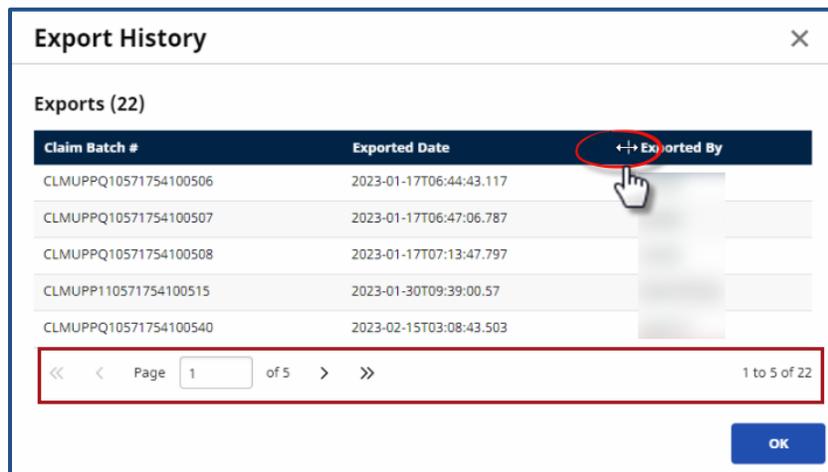
Several enhancements have been applied to some of the e-billing results windows to include:

- **Export History** popup window in the *Claim Search* page, when adding claims to a temporary batch to export.
- **Confirm Action** popup window in the *Add Resubmit Claims E-Submission Batch Claims* page, after adding claims in temporary batch.

Enhancements include:

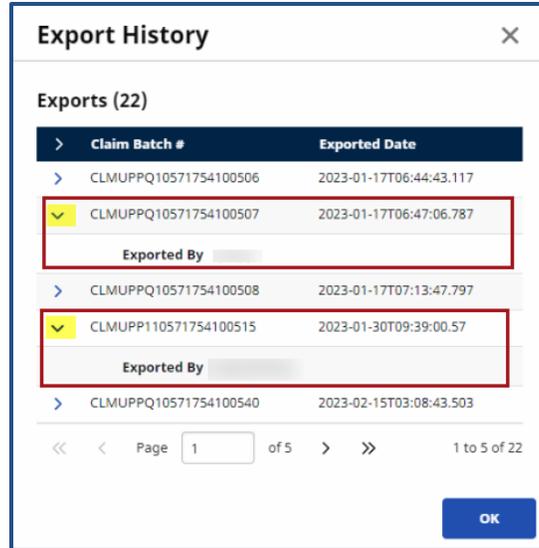
- Responsiveness
- Pagination
- Resizable Column
- Expandable Rows
- Custom **No Records Found** message
- Removal of horizontal scroll

The following image illustrates the *Export History* window displaying the added resizable column feature and pagination details allowing users to navigate through pages of results. The horizontal scroll has been removed.



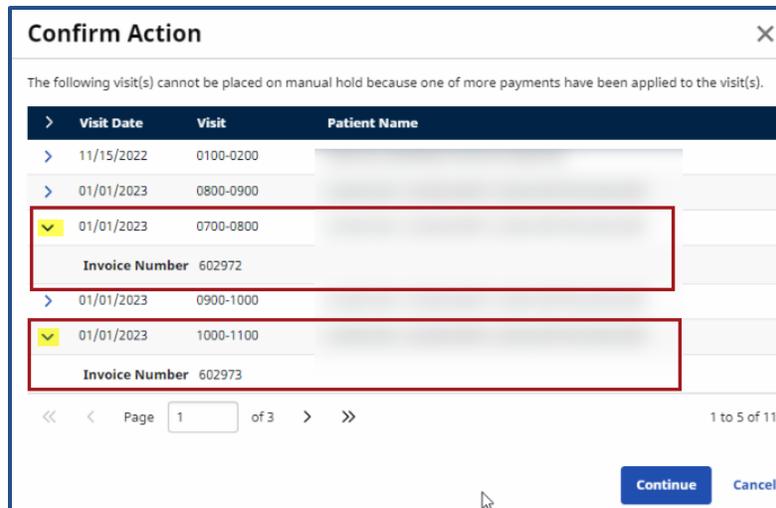
**Export History Window: Resizable Columns and Pagination**

When the window is resized to a smaller size, arrows appear to the left of the rows to indicate that further information is available for each row (i.e., the information seen if the window is expanded). Click on an arrow to view the information, as seen in the following image.



Export History Window: Expand Row to View Information

The same features are also seen in the *Confirm Action* popup window, as illustrated in the following image.



Confirm Action Window: Expand Row to View Information

## Billing Review Hold: Missing Caregiver PLN (Internal Contracts)

The **Missing Caregiver Professional License Number (PLN)** billing hold is now available across the application to include Internal Contracts; originally introduced in Release 22.12.01 for certain Linked Contracts.

Refer to Release Notes 22.12.01, [Billing Review Edit for Missing Caregiver PLN and Export](#) section for further details. For instructions on how to resolve this and other billing holds, refer to the [Billing Resolutions topic](#).

## Condition Code for Internal Contracts

For some contracts, Payers require a **Condition Code** for Providers to indicate the reason for resubmitting a claim. This feature, initially available to some Linked Contracts, is now available for Internal Contracts.

Refer to the [Rebilling Condition Code section](#) via the Enterprise Help Portal for further details.

**Note:** For Internal Contracts, the **Condition Code** also displays for Mileage records when claims are submitted as Adjustments.

# Report Modifications

## DISCLAIMER

Report Modifications will be fully available on 6/29/2023. Please contact [HHAX Client Support](#) for details, setup, and guidance.

The following sections provide updates or changes made to existing HHAExchange Reports.

## Program Code Column Added to AR Detail Per Visit Report

A **Program Code** column has been added to the **AR Detail Per Visit Report** (*Report > AR > AR Detail Per Visit*), displaying the Patient Authorization Program Code, as seen in the following image.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Sr#	Visit Date	Admission ID	Patient Name	Invoice #	Invoice Date	Last Exported Date	Service Code	Terms	Hours	Total Amt	Paid Amt	Adj. Amt	Balance	Aging	Visit Agno	Program Code
1	07/05/2022	SUM-9921195856703	Internal_Patient_SUMO25_July	610586	05/11/2023		22.07_RN	45	01:45	\$561.75			\$561.75	6	316	123, Program-code-2
22	06/05/2022	SUM-9921195856703	Internal_Patient_SUMO25_July	609122	07/26/2022	05/03/2023	22.07_PCA	15	03:15	\$980.00			\$980.00	295	346	AAA-Program:C ode-252

AR Detail Per Visit Report: Program Code Column

## Office Field Added to Invoices Not in HHA Exchange Report

An **Office** column has been added to the **Invoice Not in HHAExchange Report** (*Billing > Cash Payment > E-Remittances > Invalid Visit > Invoice Not In HHA Exchange*), displaying the Patient’s Office in the HHAExchange application, as seen in the following image.

HHAexchange		Invoices Not in HHA Exchange				Page 1 of 1			
						Report Date: 6/1/2023 3:26:00 AM			
Vendor Name: Support Training MO/ML - APP		Contract Name: Guildnet		Check Number: 20220719Guildnet1		Check Date: 11/01/2019			
Sr #	Office	Invoice Number	Patient Last Name	Patient First Name	Patient ID	Payer Reference No	Visit Date	Billed Amt	Paid Amt
1	Support Miami New	608999	Eligible	Member Not	NE0000000	10/11/2019-038-11	05/03/2022	\$20.00	\$20.00
								\$20.00	\$20.00

Invoices Not in HHAExchange Report: Office Column

## CSV Option Added to the Cash Posting Detail by Check Report

The **CSV** report output option has been added to the **Cash Posting Detail by Check Report (Report > AR > Cash Posting > Cash Posting Detail by Check)**. The CSV option is seen when clicking on the Generate Report button, as seen in the following image.

Cash Posting Detail by Check Report: Generate Report: CSV Option

## Payroll Hours by Caregiver Summary with New Payroll V2 Report Enhancements

Several enhancements have been implemented in the **Payroll Hours by Caregiver Summary with New Payroll V2 Report (Report > Payroll > Payroll Hours by Caregiver Summary with New Payroll V2 Report)**, as follows:

- A **Grouping By** field has been added allowing Providers to view data By Caregivers or By Current/Prior Week, as selected.
- In addition, the below-listed options have been added. When selected, additional columns display in the generated report.
  - Alt Caregiver Code
  - Coordinator Name
  - Pay Rate (select to show Pay Rate, OT Rate, and Holiday Rate in respective columns)

Payroll Hours by Caregiver Summary V2 Report: Added Filter Options

When *By Current/Prior Week* is selected, the generated report displays the data in **Current** or **Prior Week** respective tabs, as illustrated in the image below.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Caregiver Code	Caregiver Name	Alt. Caregiver Code	Coordinator Name	Pay Hrs	Visit	Daily	Pay Rate	Pay Amt.	OT Hours	OT Rate	OT Amt.	Holiday Hours	Holiday Live-in	Holiday Rate	Holiday Amt.	Total Hours	Total Amt.	Payroll Week
SUM-2046	App Caregiver Anshika			00:00	0	0		\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	00:00	\$0.00	Current Week (05/29/2022 - 06/04/2022)
<b>SUM-2046 Total:</b>				<b>00:00</b>	<b>0</b>	<b>0</b>		<b>\$0.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>00:00</b>	<b>\$0.00</b>	
SUM-2164	CG 22.06			01:00	0	0	\$10.00	\$10.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$10.00	Current Week (05/29/2022 - 06/04/2022)
SUM-2164	CG 22.06			06:00	0	0	\$4.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	06:00	\$2,80.00	Current Week (05/29/2022 - 06/04/2022)
SUM-2164	CG 22.06		22.03_Coordinator	01:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$0.00	Current Week (05/29/2022 - 06/04/2022)
SUM-2164	CG 22.06		22.03_Coordinator	01:00	0	0	\$3.00	\$3.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$3.00	Current Week (05/29/2022 - 06/04/2022)
<b>SUM-2164 Total: CG 22.06</b>				<b>03:00</b>	<b>0</b>	<b>0</b>		<b>\$15.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>03:00</b>	<b>\$2,179.00</b>	
SUM-1149	Man MONEY		asthwinicordinator	02:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	02:00	\$0.00	Current Week (05/29/2022 - 06/04/2022)
<b>SUM-1149 Total: Man MONEY</b>				<b>02:00</b>	<b>0</b>	<b>0</b>		<b>\$0.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>02:00</b>	<b>\$0.00</b>	
SUM-1873	Mishra S Sonam		Coordinator MO	02:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	02:00	\$0.00	Current Week (05/29/2022 - 06/04/2022)
<b>SUM-1873 Total: Mishra S Sonam</b>				<b>02:00</b>	<b>0</b>	<b>0</b>		<b>\$0.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>02:00</b>	<b>\$0.00</b>	
SUM-1233	Test Trainee		asthwinicordinator	01:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$0.00	Current Week (05/29/2022 - 06/04/2022)
<b>SUM-1233 Total: Test Trainee</b>				<b>01:00</b>	<b>0</b>	<b>0</b>		<b>\$0.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>01:00</b>	<b>\$0.00</b>	

Grouping By: By Current/ Prior Week

When *By Caregiver* is selected, the generated report displays the *Detail Data* tab, as illustrated in the following image.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Caregiver Code	Caregiver Name	Alt. Caregiver Code	Coordinator Name	Pay Hrs	Visit	Daily	Pay Rate	Pay Amt.	OT Hours	OT Rate	OT Amt.	Holiday Hours	Holiday Live-in	Holiday Rate	Holiday Amt.	Total Hours	Total Amt.
SUM-2046	App Caregiver Anshika			00:00	0	0		\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	00:00	\$0.00
SUM-2046	App Caregiver Anshika		2111_Coordinator	01:00	0	0	\$10.00	\$10.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$10.00
<b>SUM-2046 Total: App Caregiver Anshika</b>				<b>01:00</b>	<b>0</b>	<b>0</b>		<b>\$10.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>01:00</b>	<b>\$10.00</b>
SUM-2164	CG 22.06			01:00	0	0	\$10.00	\$10.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$10.00
SUM-2164	CG 22.06			00:00	0	0	\$5.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	00:00	\$2,160.00
SUM-2164	CG 22.06		22.03_Coordinator	01:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$0.00
SUM-2164	CG 22.06		22.03_Coordinator	01:00	0	0	\$3.00	\$3.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$3.00
SUM-2164	CG 22.06		22.03_Coordinator	00:30	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	00:30	\$0.00
SUM-2164	CG 22.06		22.03_Coordinator	01:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$0.00
SUM-2164	CG 22.06		22.03_Coordinator	03:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	03:00	\$0.00
SUM-2164	CG 22.06		22.03_Coordinator	04:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	04:00	\$0.00
SUM-2164	CG 22.06		22.03_Coordinator	06:00	0	0	\$15.00	\$30.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	06:00	\$30.00
SUM-2164	CG 22.06		22.03_Coordinator	02:00	0	0	\$15.00	\$30.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	02:00	\$30.00
SUM-2164	CG 22.06		22.03_Coordinator	04:00	0	0	\$15.00	\$60.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	04:00	\$60.00
<b>SUM-2164 Total: CG 22.06</b>				<b>23:30</b>	<b>0</b>	<b>0</b>		<b>\$199.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>23:30</b>	<b>\$2,359.00</b>
SUM-1149	Man MONEY		asthwinicordinator	02:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	02:00	\$0.00
<b>SUM-1149 Total: Man MONEY</b>				<b>02:00</b>	<b>0</b>	<b>0</b>		<b>\$0.00</b>	<b>00:00</b>		<b>\$0.00</b>	<b>00:00</b>			<b>\$0.00</b>	<b>02:00</b>	<b>\$0.00</b>
SUM-1873	Mishra S Sonam		Coordinator MO	02:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	02:00	\$0.00
SUM-1873	Mishra S Sonam		Coordinator MO	01:00	0	0	\$0.00	\$0.00	00:00	\$0.00	\$0.00	00:00		\$0.00	\$0.00	01:00	\$0.00

Grouping By: Caregiver

## Payroll Hours by Caregiver Detail with New Payroll V2 Report Enhancements

An **Alt. Caregiver Code** filter option has been added to the **Payroll Hours by Caregiver Detail with New Payroll V2 Report** (*Report > Payroll > Payroll Hours by Caregiver Detail with New Payroll V2 Report*).

The screenshot shows the configuration interface for the 'Payroll Hours by Caregiver Detail V2' report. It includes various filters and options:

- Payroll Setup:** Default Payroll Setup
- Office(s):** All
- Caregiver:** (text input)
- Patient Team(s):** All
- Caregiver Team(s):** All
- Week End Date:** 06/04/2022
- Coordinator:** All
- Patient Location(s):** All
- Caregiver Location(s):** All
- Batch Number:** SUM00409 (05/29/2022-06/04/2022)
- Grouping By:** By Current/Prior Week
- Patient Branch(es):** All
- Caregiver Branch(es):** All
- Hours Display:** Hour (HH:MM) (selected), Decimal
- Select additional columns to display:**
  - Patient Team
  - Caregiver Team
  - Alt. Caregiver Code** (highlighted)
  - Travel Time
  - Contract Name
  - Patient Location
  - Caregiver Location
  - Expenses
  - Absences
  - Patient Branch
  - Caregiver Branch
  - Mileages
  - In-Services

Payroll Hours by Caregiver Detail with New Payroll V2 Report: Alt. Caregiver Code

When selected, the data is displayed under the **Alt. Caregiver Code** column, as seen in the image below.

A	B	C	D	E
Caregiver Code	Caregiver Name	Alt. Caregiver Code	Patient Name	Adm. ID
SUM-1806	ZiKonaa Samul	1x1qz		
<b>SUM-1806 Total:</b>	<b>ZiKonaa Samul</b>			
SUM-1248	Testing Compliance		Island Staten	SUM-9900978

Alt. Caregiver Code Column