Release Notes

Enterprise Version 22.04.01

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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.

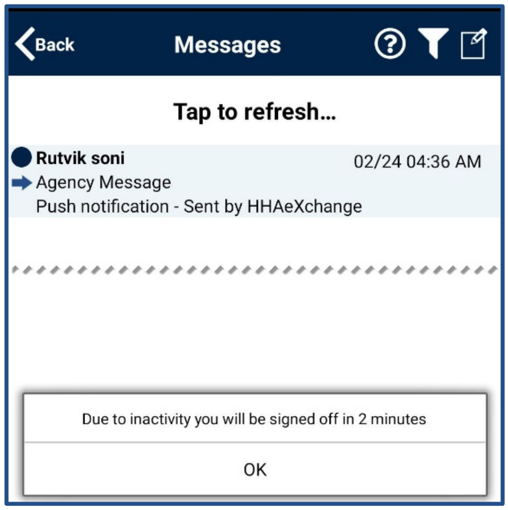
Release Notes Summary

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

Mobile App Updates

Mobile App: Idle Timeout Changes

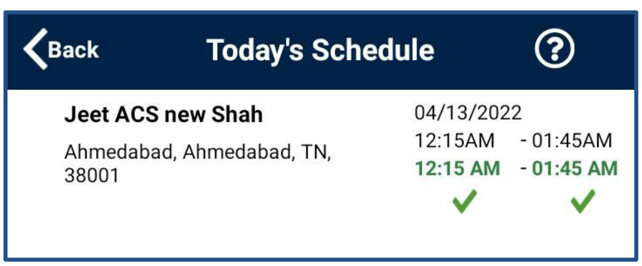
To better secure access to sensitive Patient data, the Caregiver Mobile Application now times out and logs the user out of the app after 15 minutes of inactivity. All data is saved when the application times out and closes. If the application has timed out, the user must log in again to continue using the application.



Time Out After 15 Minutes of Inactivity

Mobile: Unscheduled Visits created on Single Row

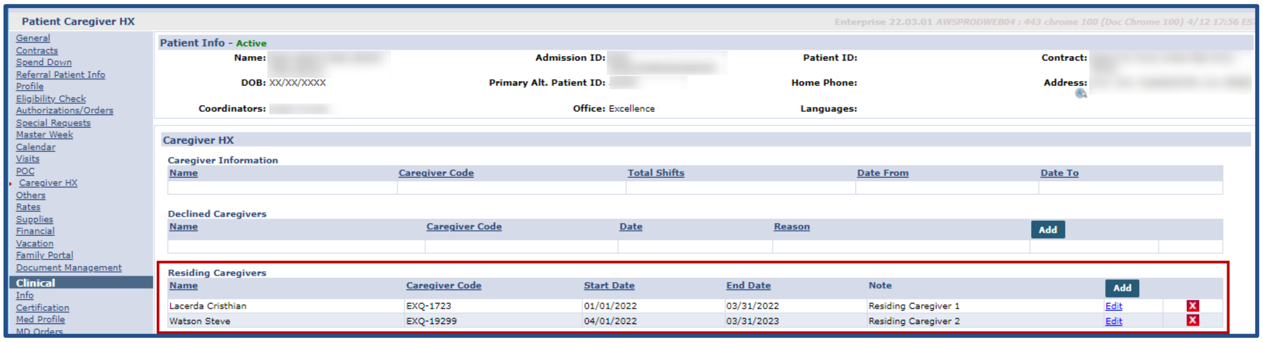
In this release, the Clock-In and Clock-Out for an Unscheduled Visit are shown on one row on the mobile app's *Today's Schedule* screen instead of separate rows.



Single Row Clock-In/Out

Establish Patient/Caregiver Association for Residing Caregiver

When data is updated (added, edited, or deleted) in the *Residing Caregiver* section (***Patient > Caregiver Hx***) of a Member Child Profile, a merge is necessary in the Member Parent Profile for the information to sync. In this release, the system has been enhanced to copy/sync any updated Residing Caregiver information from the Child Profile to the Parent Profile. Any overlapping/existing information does not copy over eliminating duplicate data.



Patient Parent Profile: Residing Caregiver Section

If a Patient Profile is unmerged, then all synced Residing Caregiver information is removed from the Parent Profile and is solely kept in the Child Profile.

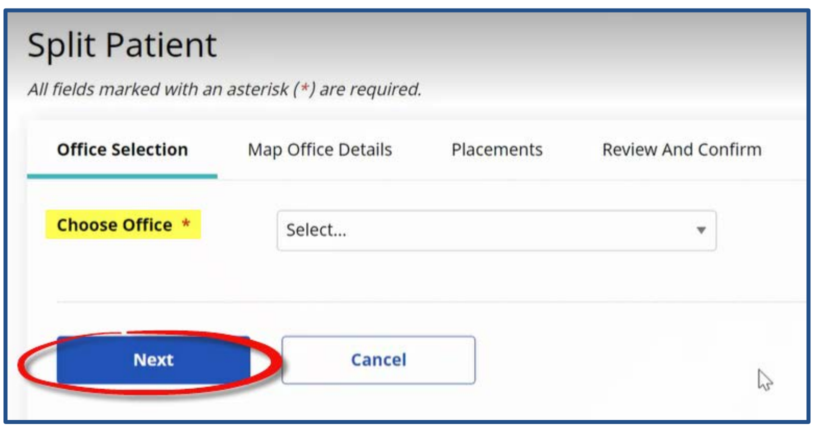
Blended Services: Split Patient Record

The **Blended Services** feature allows Providers to split a Patient record, typically used when a Patient receives both Personal Care Services as well as Consumer-Directed Services. Ultimately, the system makes a copy of the Patient record and routes the information back to the Payer as one Patient. This feature only works on Patients with *active* or future Placements. If the Placement is in the past, then the system does not allow the split.

Once a Placement is received from a Payer, navigate to the *Patient Profile* (***Patient > General***) and click on the ***Edit*** button. The ***Split Patient*** button becomes available to select under the *Split Patient Record* section, as seen in the following image. Click on the ***Split Patient*** button to initiate.

Split Patient (Record) Button

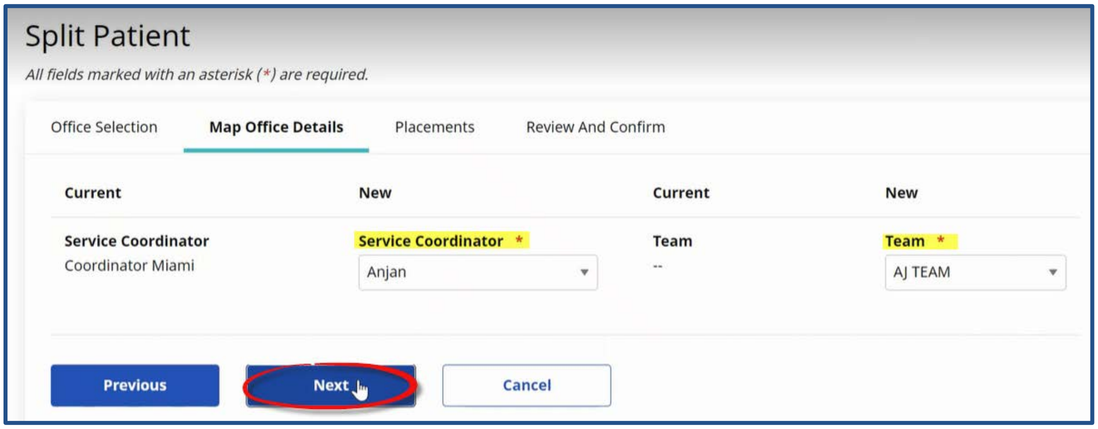
The *Split Patient* window opens to the *Office Selection* tab. Select the office in the **Choose Office** field and click on the ***Next*** button.



Split Patient: Office Selection Tab

Note: *The Offices available to select are limited to the offices the user is assigned to.*

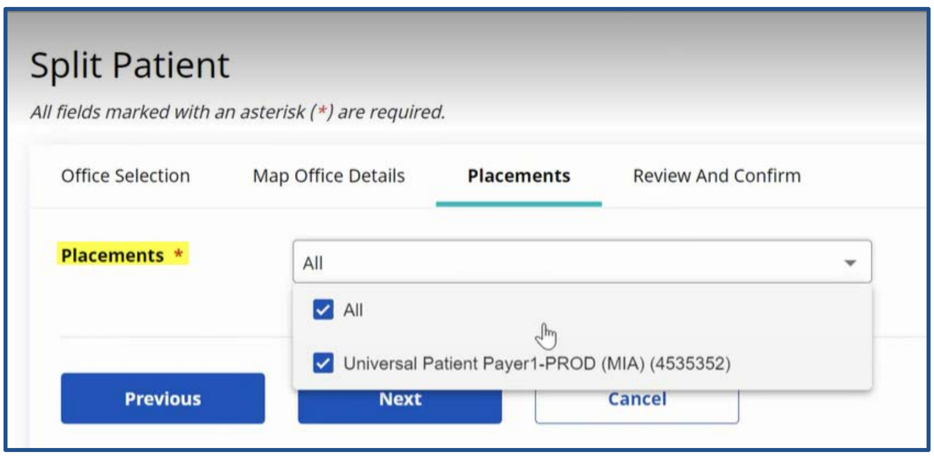
The next tab, *Map Office Details* appears. Complete the required fields* by selecting the **Service Coordinator** and **Team**. Click on the ***Next*** button to continue.



Split Patient: Map Office Details

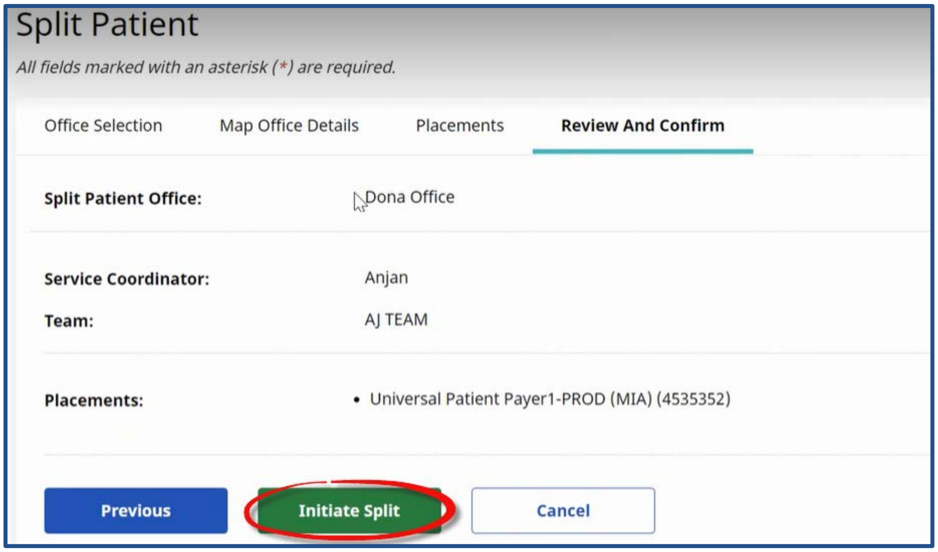
***Note:** Field requirements depend on the field requirements set at the Agency level (**Admin > Agency Profile > Required Patient Fields**).*

On the *Placements* tab, select the applicable Placement(s), as illustrated below.



Split Patient: Placements

On the final tab, *Review and Confirm*, review the details and click on the ***Initiate Split*** button.



Split Patient: Review and Confirm

The system alerts that the Split Patient record has been created. Click ***Close*** to exit.

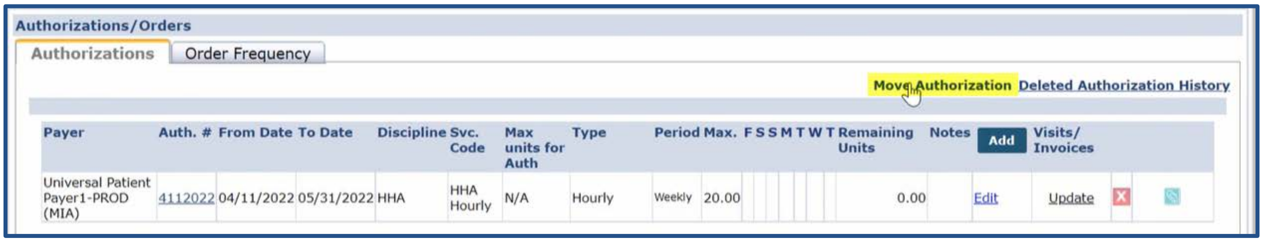
Successful Split Patient Record

Once processed, the Split Patient Record appears in the Patient's Profile General page, as seen in the following image. The original record remains in the header with the original Office. Any additional Authorizations go to the original Patient record as well as communications from the Payer.

Patient Profile: Split Patient Record

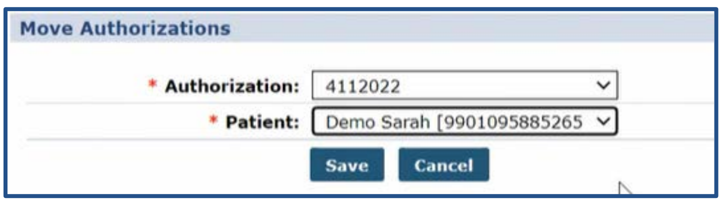
Moving Authorization

Once the split is completed, Providers have the option to move Authorizations from one Patient Profile to the other. To move an Authorization, navigate to the *Authorization/Orders* page (***Patient > Authorizations/Orders***) and click on the **Move Authorization** link), above the grid, as illustrated in the following image.



Move Authorizations Link

The *Move Authorization* window opens. Select the applicable **Authorization** and **Patient**. Note that this only applies to Patients with split records and for *active* current Authorizations (no past Authorizations); therefore, only applicable Authorizations and Patients are available to select.

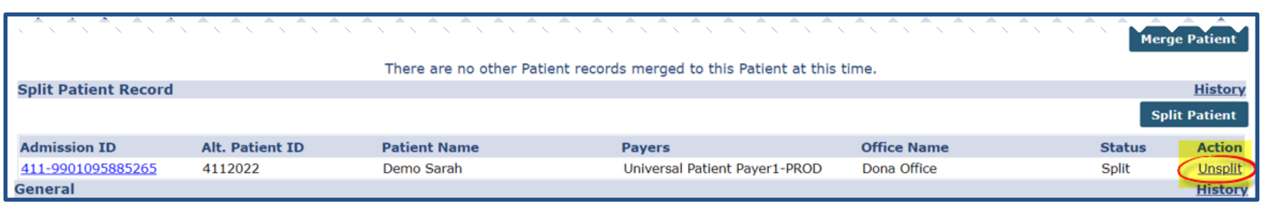


Move Authorizations Window

In addition, an Authorization cannot be moved if visits are confirmed and billed.

Deleting a Split Patient Profile

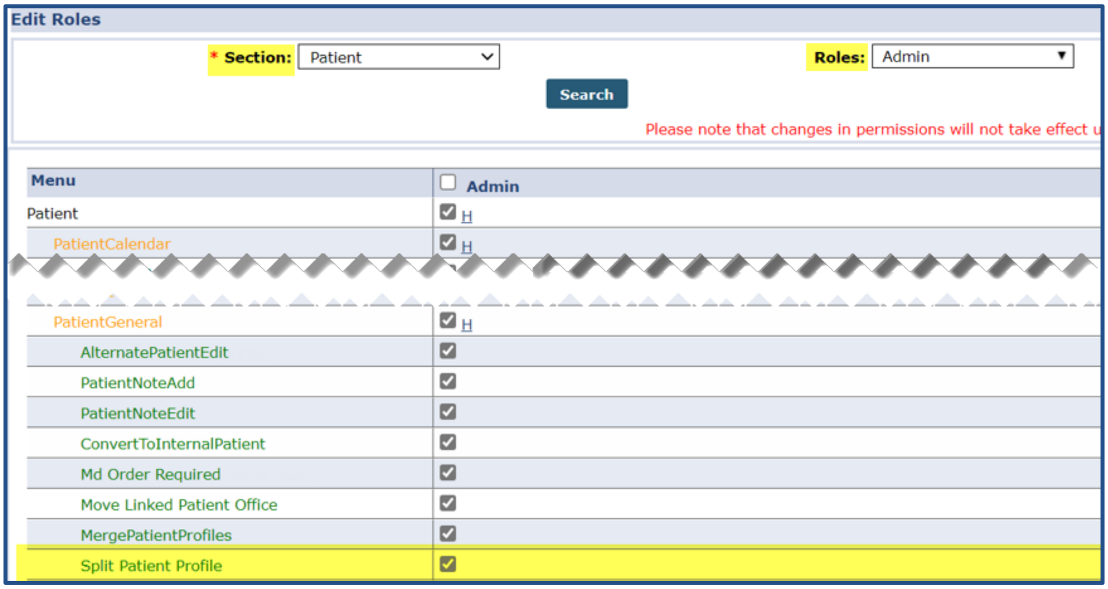
A Split Patient Profile can be deleted provided that there are no scheduled visits, authorizations, invoices or any activity associated with the profile. To delete, click on the **Unsplit** link (as seen in the image below) and follow the system prompts. If any activity is associated with the Split Patient Profile, then the system issues a validation at the time of deletion, not allowing the un-split.



Unsplit Patient Record Link

Permission: Split Patient Record

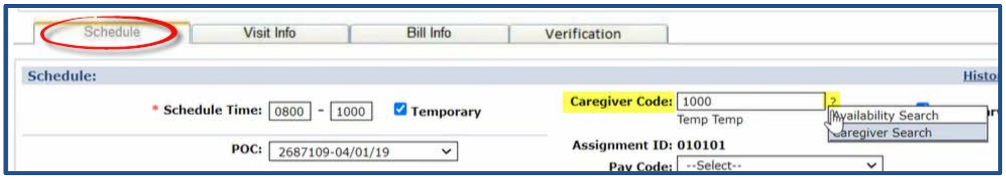
Permissions for this feature is role-based. To assign permissions, navigate to ***Admin > User Management > Edit Roles***. Select *Patient* from the **Section** field, applicable **Roles** from the dropdown field and click ***Search***. Under the *Patient General* category, select the **Split Patient** permission for the chosen roles and click ***Save*** to finalize.



Permission: Split Patient Profile

New Caregiver Search from Visit Window

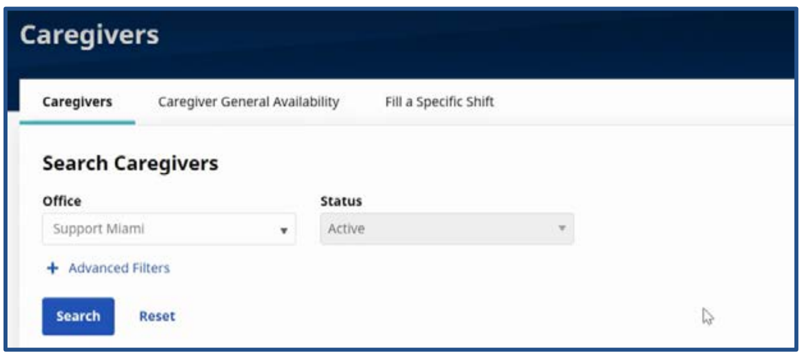
As of this release, when searching for a Caregiver for a visit from the visit *Schedule* tab, clicking on the **?** to the right of the **Caregiver Code** field routes users to the new *Caregiver Search* module. From this menu, chose to generate an ***Availability Search*** or a ***Caregiver Search***, as seen in the following image.



Searching for a Caregiver to Fill a Visit

Caregiver Search

Selecting ***Caregiver Search*** routes to the *Caregivers Search* page, as seen in the following image.



Caregiver Search Page

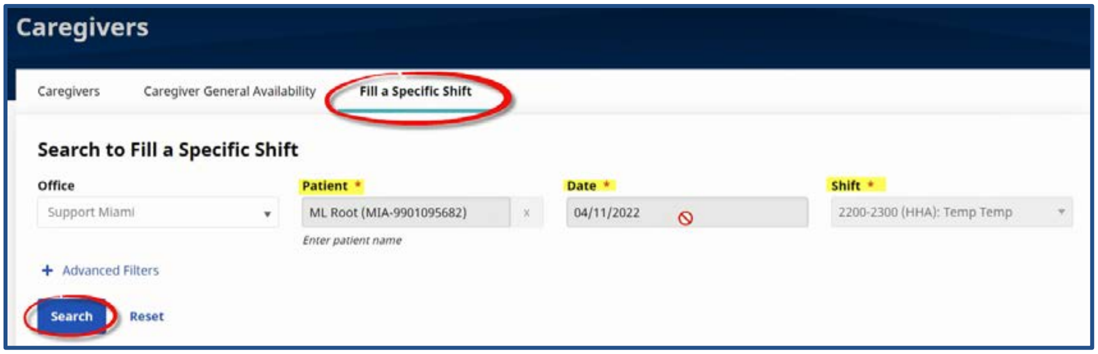
Once a Caregiver is selected for the visit, click on the ellipsis (**…**) from under the **Actions** column for the applicable Caregiver and select ***Assign to Visit***, as illustrated in the following image.

Caregiver Search: Assign to Visit

Note: *The **Assign to Visit** option is only available when the search is tied to a visit. This option does not appear when conducting a general Caregiver Search.*

Availability Search

Selecting ***Availability Search*** routes the user to the *Fill a Specific Shift* page. The visit details are prepopulated in the **Patient**, **Date**, and **Shift** fields. From this page, click the ***Search*** button to generate and select an available Caregiver.



Availability Search: Fill a Shift

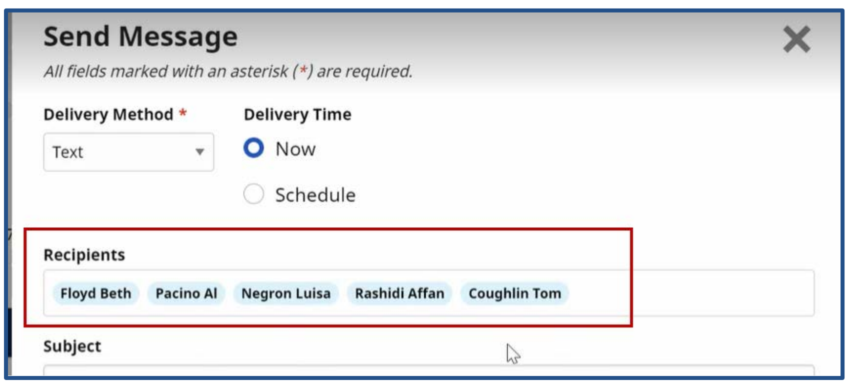
Caregiver Search Pages Save Selections

In this release, via the *Caregiver Search* module (*Caregiver Search/Availability Search/Fill a Shift* pages), Providers can search and save selections made on one search page when navigating to the next one for purposes of sending communications or sending a case broadcast for Caregivers from page to page of search results without losing selected Caregivers from previous pages.

When clicking on Next, the system generates a message asking the user to save selections before moving to the next page on the Search Results, as seen in the following image.

Caregiver Search: Save Selections per Page

Once ready to create the message or broadcast, the selected Caregivers appear in the **Recipients** field.



Selected Caregivers in Recipients Field

Automated Notes for Unstaffed Visits Ops Worklist

In this release, Automated Notes now apply to the **Unstaffed Visits** worklist, ensuring there is a note detailing why a particular task has been set to *Completed*, as seen in the following image.

Patient	Visit Date	Schedule Time	Address	Contract	Discipline	Reported On	Last Note Entered	Assignee	Status	Actions
order2 order2 Admission ID: EXQ-9000205985385411	03/27/2022	1000-1100	NEW YORK, NY, 10101	USA-Care	HHA	03/25/2022	This visit has been staffed.		Completed	•••
01 01Admission ID: EXQ-9000205985384835	03/27/2022	0100-0300	SCHENECTADY, NY, 12345	NationalInsurance	HHA	03/25/2022	This visit has been marked as missed.		Completed	•••
order2 order2	03/26/2022	1000-1100	NEW YORK, NY, 10101	USA-Care	HHA	03/25/2022			Open	•••

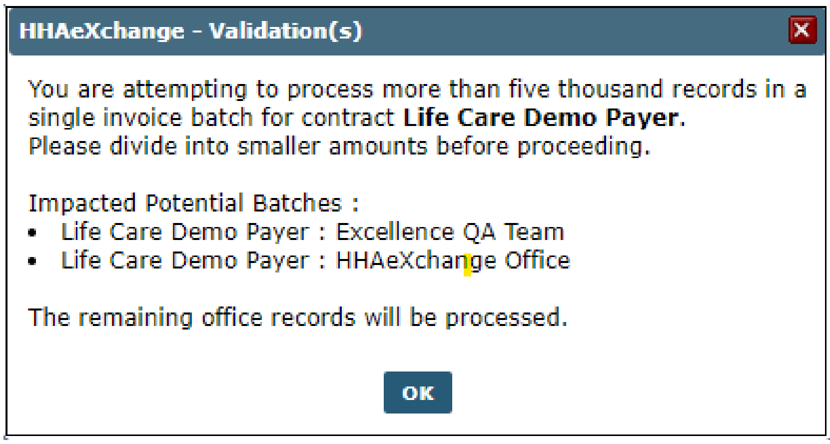
Unstaffed Visits Ops Worklist: Reason Note

Utilize Set Office Time Zone: Added Pages

In the last release, the system was enhanced to use the applicable Time Zone, based on the Caregiver's Primary Office. In this release, the *Physician Profile* and *Ops Worklists* pages have now been added to ensure that the correct time is captured.

Invoice Batch Size Limitations

To enhance system performance, a 5000-visit per batch limit has been implemented to prevent users from creating large batches. When a user attempts to create a single batch with more than 5000 visits, the system issues a validation stating the Contract and the potential impacted batches, as seen in the following image.

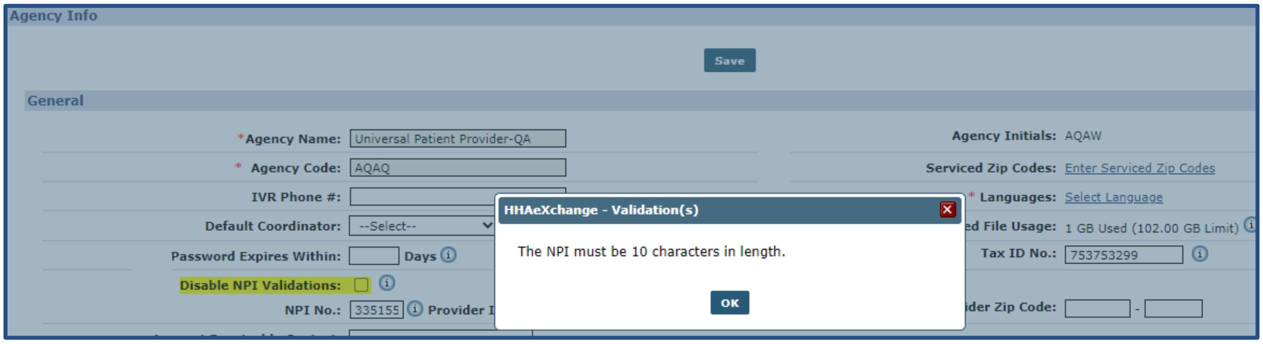


Validation: Invoice Batch Limit

NPI Field Validation Updates

In this release, Providers can disable NPI validations via the *Agency Info* page (***Admin > Agency Info***). In the *General* section, select the **Disable NPI Validation** checkbox to allow entry of custom alpha-numeric values, up to 15 characters (increased from 10).

If left unselected, then alpha-numeric values are not allowed and the 10-character limit remains, as seen in the following image.



Agency Info: Disable NPI Validations Checkbox

Report Modifications

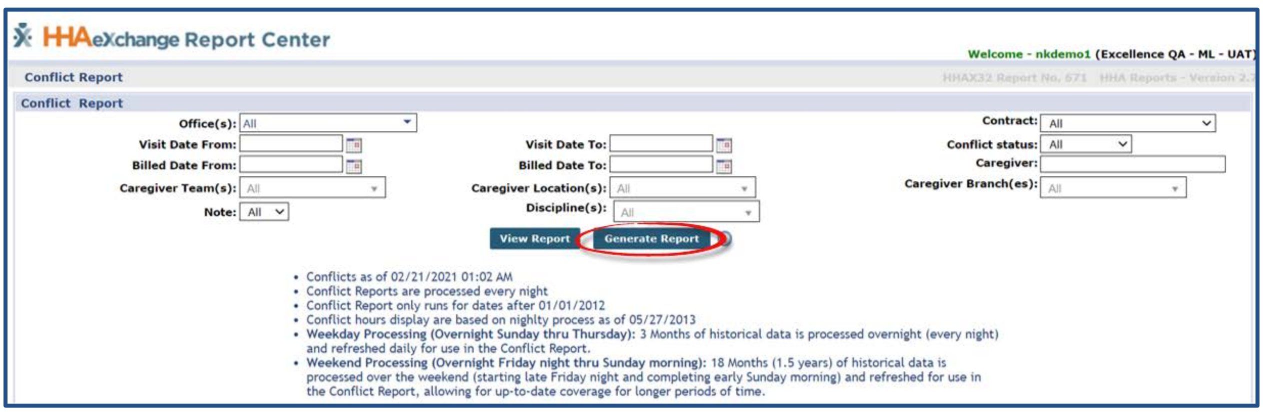
DISCLAIMER
Report Modifications will be fully available on 4/28/2022. Please contact HHAX Support Team for details, setup, and guidance.

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

Generate Report Button in Multiple Reports

A ***Generate Report*** button, alongside the existing ***View Report*** button, has been added to the following reports. These reports are available to download in Excel, PDF, and CSV formats, as seen in the following images. These reports can also be downloaded from the *Background Report Monitor* page; refer to the section below.

- Exception Reports > Conflict Report
- Payroll > Confirmed Visit Report
- Billing > Invoicing > Batch Detail Report
- DOH > Contract Service By County
- DOH > Patient Form
- Other Reports > Visit Verification Compliance
- Sales > Billing by Contract Summary
- Report > Referral Patient Reports > Referral Patient by Status



Generate Report Button

Background Report Monitor

Via the *Background Report Monitor* (***Admin >Background Report Monitor***), Providers can see the progress of a report generating as well as download the report once processing is completed. Under the **Download** column, users can click on the **Download** link or click on the **Retry** link for failed attempts, as seen in the following image.

Background Report Monitor

TelxWebRP0ports - Version 2.98

In Process Reports (refreshes automatically)

No Data Found.

Refresh

Completed Reports

Search Results (21)

Next Last

Report	Submitted Time	Actual Start Time	End Time	Duration	Status	Download
AR Summary Report	4/5/2022 3:25:03 PM	4/5/2022 3:25:19 PM	4/5/2022 3:26:24 PM	00:01	Completed	Download
Pre-process payroll (Summary) 188	4/5/2022 3:13:10 PM	4/5/2022 3:13:19 PM	4/5/2022 3:19:46 PM	00:06	Completed	Download
Billing Report	4/5/2022 2:17:05 PM	4/5/2022 2:17:18 PM	4/5/2022 2:26:04 PM	00:09	Completed	Download
Visit Report	4/5/2022 2:16:19 PM	4/5/2022 2:16:48 PM	4/5/2022 2:21:39 PM	00:05	Failed	Retry
Visit Report	4/5/2022 2:04:45 PM	4/5/2022 2:04:48 PM	4/5/2022 2:46:55 PM	00:42	Failed	Retry
Visit Report	4/5/2022 1:59:29 PM	4/5/2022 1:59:49 PM	4/5/2022 2:17:29 PM	00:18	Failed	Retry
Visit Report	4/5/2022 1:48:55 PM	4/5/2022 1:49:18 PM	4/5/2022 1:51:37 PM	00:02	Failed	Retry
Visit Report	4/5/2022 1:45:52 PM	4/5/2022 1:46:18 PM	4/5/2022 1:51:22 PM	00:05	Failed	Retry
Billing Report	4/5/2022 1:43:04 PM	4/5/2022 1:43:18 PM	4/5/2022 1:43:26 PM	00:00	Completed	Download
Billing Report	4/5/2022 1:33:22 PM	4/5/2022 1:33:48 PM	4/5/2022 2:37:24 PM	01:04	Completed	Download

Background Report Monitor