



HHAeXchange Lunch-and-Learn Webinar *Call Dashboard – Fixing Exceptions (Evv Agencies Only)*

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Today's Agenda: *Call Dashboard-Fixing Exceptions*

Call Dashboard Overview (Call Maintenance)

Call Dashboard Exceptions

- Phone Number Not Found
- No Schedule on Calendar
- Call from Caregiver Number
- Visit Verified by Different Caregiver
- Duplicate Call
- No Schedule Opening



Call Dashboard Overview

Call Dashboard: Call Maintenance

Call Maintenance – Functionality

- Unsuccessful EVV Confirmation
- “Calls Looking for a Visit” (Exception)
- EVV Confirmations *attempted* but not *successful*
- Display of calls for *Review* and *Action*

Call Maintenance – Process

- Review and Diagnose
- *Link* or *Reject* Call

Call Maintenance – Status



Call Dashboard: *Phone Number Not Found*

Call Dashboard: Phone Number Not Found

Desc: Caregiver placed call from a phone number not found *anywhere* in the HHAeXchange System

- **Step 1:** Click on Caregivers Name and verify Phone Number
- **Step 2:** Check if Caller ID listed is the correct Member Phone Number
- **Step 3:** Click on Member Name to view Member Profile
- **Step 4:** Edit Member Profile and update Phone 2 and/or Phone 3
 - Member → Profile Page → Phone 2/Phone 3
 - Call will be *Linkable* after overnight process (Phone 2 or 3 will match the call)
- *Alternative:* If Member is not in HHAeXchange yet, *Reject* the Call



Call Dashboard:
No Schedule on Calendar

Call Dashboard: No Schedule on Calendar

Desc: Caregiver called from a Member that has no schedule on calendar

- **Step 1:** Click on the Caller ID number
- **Step 2:** Check if there is a Schedule for the Visit
- **Step 3:** View the Member's Calendar
- **Step 4:** Enter the Schedule on the Member's calendar
 - Call will be *Linkable* after overnight process



Call Dashboard:
Call from Caregiver Number

Call Dashboard: Call from Caregiver Number

Desc: Caller ID number appears on the Caregiver's Profile

- **Step 1:** Instruct Caregiver to call from Member's Phone
- **Step 2:** Manually enter confirmed Visit Times (and Reason/Action)
- **Step 3:** *Reject* the call from the Call Dashboard



Call Dashboard:
Visit Verified by Different Caregiver

Call Dashboard: Visit Verified by Different Caregiver

Desc: Visit has a confirmed Clock-in/Clock-out from a Different Caregiver

- Caregiver placing EVV call is not scheduled for that Visit
- Often occurs if Caregiver enters wrong Time & Attendance PIN
- **Step 1:** Click on the Caller ID number
- **Step 2:** Verify which Caregiver made the Call (Clock-in/Clock-out)
- **Step 3:** Determine if this is truly an Incorrect Caregiver
 - Remove Visit Times from Calendar
 - Update Information for Correct Caregiver for the visit
 - Call will be *Linkable* after overnight process



Call Dashboard: *Duplicate Call*

Call Dashboard: Duplicate Call

Desc: Caregiver already placed a Call-In/Call-Out within last 30 minutes

- **Step 1:** Click on the Caller ID number
- **Step 2:** Check to verify the Call is actually a Duplicate
 - Look at Visit Start Time (for Call-in) or Visit End Time (for Call-out)
 - Look at the Call Time listed (should be *after* Visit Time)
- **Step 3:** *Reject* the call



Call Dashboard: *No Schedule Opening*

Call Dashboard: No Schedule Opening

Desc: Multiple Potential Exceptions (1 or more)

- **Step 1:** Check if Caller ID is listed under the Member's *Phone* fields
- **Step 2:** Click on Caregivers Name
 - Check if Schedule Times Exist for Visit
- **Step 3:** Address and Fix all Exceptions (one by one)
 - Call may be *Linkable* after overnight process once exceptions addressed

Call Dashboard: Fixing Exceptions (Wrap-up)

Check Call Dashboard Daily

Look for Last 2 *Days* of Calls

Link or Reject Calls

Ensures Visits move to Prebilling/Billing Phases