

T Zone Pennsylvania Joint MCO Provider Information Session

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Agenda – Morning Session

9:00 AM - 11:00 AM

HHAeXchange Provider Information Session

- System Presentation and Demonstration
- Functionality Common to all MCO Plans

11:00 AM - 12:30 PM

MCO Specific Training

• Each MCO will present for 30 minutes covering plan-specific workflows and HHAeXchange system usage





Agenda - Afternoon Session

1:30 PM - 3:00 PM

HHAeXchange Provider Information Session

- System Presentation and Demonstration
- Functionality Common to all MCO Plans

3:00 PM – 4:30 PM

MCO Specific Training

• Each MCO will present for 30 minutes covering plan-specific workflows and HHAeXchange system usage



HHAeXchange at a Glance



Member Management

- Member Demographics
- Authorizations
- Service Details (if applicable)

Visit Entry Options

- Quick Visit Entry
- HHAeXchange EVV
- Open Model EDI





Billing & Reporting

- Eliminate Denials with
 Pre-Bill Scrubbing
- Bill Multiple MCOs for Confirmed Visits







Provider Services in Scope

- Home Health Aide
- Nursing (LPN)
- Nursing (RN)
- Occupational Therapy
- Occupational Therapy Assistant
- Physical Therapist
- Physical Therapist Assistant
- Speech and Language Therapist
- Personal Assistance Services (PAS) (Agency) (Mandated EVV)
- PAS (CSLA) Shared Living
- Respite (Mandated EVV)



Service Coordination Services in Scope

- W1011 Service Coordination
- Any services billed on behalf of other providers





Mandated EVV

Section 12006 of the 21st Century CURES Act requires states to implement an EVV system for Medicaid-funded Personal Care Services (PCS) by January 1, 2019 and for Home Health Care Services (HHCS) by January 1, 2023. Federal legislation delayed penalties for PCS implementation until January 1, 2020.

WHAT INFORMATION MUST THE EVV SYSTEM COLLECT?

- 1. Type of service provided
- 2. Individual receiving the service
- 3. Individual providing the service
- 4. Date of the service
- 5. Location of the service deliver
- 6. Time the service begins and ends



Top 6 Takeaways from Today

Authorizations

 How to review authorizations sent from the MCOs in HHAeXchange

Communication

- How to communicate with the MCOs using HHAeXchange's Notes
- Visit Confirmation
 - How to add or review visits in HHAeXchange

Invoicing / Billing

 How to review invoices and bill in HHAeXchange

Credentials

- How to create user names and passwords in HHAeXchange
- Support
 - How to access Quick Start Guides and Support Articles





Questions Anyone?

- We expect you to have questions
- Questions will vary based on
 - Size of Organization
 - Visit Entry Method
 - Services Performed

Questions Today

- Questions after Today's Session
- Questions after you begin to use HHAeXchange System

Questions

* HAeXchange

	Agency Phone:
_ Your E-mail: _	





- PA Provider Information Center
 - https://hhaexchange.com/PACHC
- Create Credentials for Users
- Enter Caregivers or Prepare EDI Test Files



HHAeXchange Provider Information Center

https://hhaexchange.com/PACHC



10

Creating HHAeXchange User Access

Add New User		Limited 15.3.1.0 TELXWE
Add New User		
* First Name:	IP Restricted	IP1 : IP2 : IP3 :
* Last Name:	Hourly Restricted	Day From To IP 🚺
* Login Name: 🧻 🧿		Mon :
* E-mail:		Tue :
* Role: Select 🔻		Wed :
Default Home Module Tab: _ Link Communications _ System Notifications ()		Thu:
Status: Active 🔻 🚺		Fri :
		Sat :
		Sun :
Save	Cancel	



Provider Information Center – User Training

- Pre Go-Live: System User Training Webinars
 - Week of 12/2 and Week of 12/9
 - SCE's may need to attend Non-homecare training and Homecare training
 - Training registration will be emailed to all attendees by November 15th
 - Registration will also be made available on the PA Provider Information Center Training Page
- Post Go-Live: Lunch & Learn Webinars
 - 30-minute, single-topic sessions (2x per week)
 - Topics such as Provider Quick Start Guide, Communications and Notes, EVV Call Dashboard, etc., are just a few of many that will be covered
 - Visit the Provider Information Center (Training Page) after Go-Live for dates on upcoming webinars



Inviting Users to System Training (Today)

rovider/ Agency Na	me:	Your Name:
hone#	Your Email:	
ease provide the fo	ollowing Information for attendees o	of the system user training in your organization
User First Name		User Last Name
User First Name		User Last Name
		User Last Name
User First Name		User Last Name
		User Last Name
		User Last Name

PART 1

- HHAeXchange System Introduction
- Member Management
- Communications (Notes)



PART 2 – Based on Provider's Method of Visit Entry/Management

- HHAeXchange EVV
 (Free EVV System Provided by MCOs)
- Manual Visit Entry (Visit Quick Entry Function – Directly into HHAeXchange)
- EDI

(Electronic Data Interchange – 3rd Party EVV/Agency Management System)



PART 2 – Based on Provider's Method of Visit Entry/Management

• HHAeXchange EVV



EV\

Manua EDI

PART 3

- Pre-Billing/Billing
- Reporting
- Administration
- Upcoming Enhancements



HHAeXchange System Introduction



HHAeXchange System Introduction

HHAeXchange System Nomenclature

- *Member* = Patient = Recipient = Consumer = Participant=Client
- *Caregiver* = Attendant = Aide
- *Provider* = Agency = Vendor
- *MCO* = Payer = "Plan"
- Log In Process (<u>www.hhaexchange.com</u> → CLIENT LOGIN)
- Home Module
 - Landing Page
 - Reviewing Pending Placements and Communications with MCOs

System Support

- Super Users
- HHAeXchange Support Center: Documentation Catalog
 - Process Guides
 - Job Aids
 - Reference Material
 - Resource Center <a href="https://https///https//h
 - Register for live training
 - Review recorded trainings on demand
 - Review FAQs





Member Management (Placement)



Member Management – Placement Alerts

New Placement Request (Email)

This is an automated	d notification email. Do NOT reply.
A new placement requ	uest has been sent to you with the following details.
Payer Name	Table Table 1988 1988
Admission ID	
Start of service	1 m m
Cut of time	a man and a man and a man and
Address	and income frame , they have been as a second
Frequency	:SAT:0-0, SUN:0-0, MON:0-0, TUE:0-0, WED:0-0, THU:0-0, FRI:0-0
Special Requests	:Request Gender: Male , Primary Language: English, Secondary Language: Spanish
Discharge Date	17
HHA Exchange	
	ccompanying attachments contain information from Homecare Software Solutions LLC which is confidential or privileged
	ded to be for the use of the individual or entity named above. If you are not the intended recipient, be aware that any
	ribution or use of the contents of this information is prohibited. If you have received this e-mail in error, please notify the eply e-mail and destroy all c opies of the original message.

New Placement Request (Home → Pending Placements)

Link Communications System Notifications Member Team: All Image: Coordinator: All Image: Search Search Note: The "Coordinator" filter is only applicable for Events and Notes section. Search Search Pending Placements Admission ID Start Date Stop Date Frequency Service Cat. Service Type Request Sent At Status Cut Off Time	e Cat. Service Type Request Sent At Status Cut Off Time MCO Name	Hom	e									ited 9.0.4	
Note: The "Coordinator" filter is only applicable for Events and Notes section. Pending Placements	e Cat. Service Type Request Sent At Status Cut Off Time MCO Name Health HHA 10/17/2018 12:47:39 PM Pending 12/25/2018	L	ink Communications	System Notif	fications								
Pending Placements	e Cat. Service Type Request Sent At Status Cut Off Time MCO Name Health HHA 10/17/2018 12:47:39 PM Pending 12/25/2018 23:26:39 PM ACPA CHC	,	ember Team: All		✓ Coor	dinator: All		Search					
	Lattic Service Type Request Sent At Status Cut of Time Name Health HHA 10/17/2018 12:47:39 PM Pending 12/25/2018 23:26:39 PM CHC				Note	The "Coordinato	" filter is only applicable	for Events and Notes s	section.				
	Latt Service rype Request Sent At Status Lut on time Name Health HHA 10/17/2018 12:47:39 PM Pending 12/25/2018 23:26:39 PM ACPA		Pending Placements										
	Health HHA 10/17/2018 12:47:39 PM Pending 12/25/2018 23:26:39 PM CHC				Stop Date	Frequency	Service Cat.	Service Type	Request Sent At	Status	Cut Off Time	MCO Name	
			191827467	09/01/2018			Home Health	ННА	10/17/2018 12:47:39 PM	Pending			
											25.20.35 PM	Traini	
Notes			From	Created Date	Member Name	Re	ason	Note				Actions	
Notes	Page 1 of : Note <u>MCO Name</u> Action:		KEYSTONE FIRST CHC DEMO (DO N USE)		N/A	Co	mmunication		please provide the IDs and D h you are awaiting placement		ACPA CHC Training	Reply Close	



Member Management – Placement Review

- Review Placement
 - Click on <u>Admission ID</u> to display *Placement Window*
 - Review Member Info
 - General: Demographics (Masked)
 - Special Requests: Gender, Language, Notes

	Member Info					
	Placement Type: Home Ho	ealth				
	General					
	* Placement	Acceptance Window: 99999 (Mins) 🕦				
		Member Name: XXXXX		Men	nber ID: XXXXX	
		Admission ID: 191827467		Δ	Address: XXXXX	
		Phone: XXXXX				
		* Service Start Date: 9/1/2018		Zi	ip Code: 19019	
		MCO Name: ACPA CHC Training		Alt. Men	nber ID:	
		Discharge Date:		Fre	quency:	
Authorization (i)		Gender: Female				
* Ser	rvice Category: Home Health 🔽	Service Type: HHA	\sim			
* Authoriz	ation Number: P000908765	* Service Code: T2025	\sim	Service Code Type: Hourly (Mutua	al + Member Shift Overlap)	
	* From Date: 09/01/2018	* To Date: 02/28/2019		Authorization Type: Entire Period	\checkmark	
Diag	nosis Code #1:	Diagnosis Code #2:		Diagnosis Code #3:		
Hours						
Set Masterweek Now	: 🗆					
* Hours pe	r Auth. Period: 962 🚺 🧃	Additional Rules:				
* Member Team: Se	elect	* Coordinator: Select	Accept	est More Time Accept And Print	Select Deny	
Service Location Cod	le: N/A 🕥 🚺					





Member Management – Placement Acceptance

Accept Placement

* Member Team: Default	* Coordinator: Default	Accept Request More Time	Accept And Print Select	t 🔽 Deny
Service Location Code: N/A				

- Select Member Team and Coordinator
- Select Button at bottom of *Placement Window*
 - Accept
 - Request More Time
 - **Deny** (Must select **Reason Code** for denial)
- Placement is cleared from *Pending Placements* on Home Page
- Member Module \rightarrow Profile Page (Status = Active)



Member Management – Placement Queue

- Action → Pending Placement Queue
- 4 Placement Queue Sections
 - Pending
 - Default *Cut off* Time (per MCO)
 - Approaching *Cut Off* (in red)
 - Removed from Queue after *Cut Off*
 - Staffed with Temp Caregiver
 - Staffed
 - Accepted with no Masterweek

Member Team: All	×	Search							
Total Pending: 1 Pending		Total Accepted: 0		Total Staffed: 0	Total Acc	epted with no Masterweek: 1			
chung								-	age 1 of
Addmission ID	Start Date 👻	Stop Date	Frequency	Service Cat.	Service Type	Request Sent At	Status	Cut Off Time	MCO Name
									ACPA
191827467	09/01/2018			Home Health	нна	10/17/2018 12:47:39 PM	Pending	12/25/2018 11:26:39 PM	CHC
							-	11:20:39 PM	Trainin
Staffed with Tem	p Caregiver			No Acce	ated Member Found				
Staffed with Tem	p Caregiver								
	p Caregiver			No Acce	oted Member Found				
	p Caregiver			No Acce	oted Member Found				
	p Caregiver				oted Member Found				
Staffed									
Staffed with Tem Staffed Accepted with No									-
Staffed		Addmission ID	Start Date	No Staf		y Time Accepted		Payer Name	_



Member Management – Member Profile

- Member Module Index of Pages
 - General
 - Provider Information
 - Status History
 - Member Notes
 - Profile (Demographics)
 - Authorization
- Primary Statuses (Pending, Active)

Member General	
General Profile Authorization Special Requests Master Week Calendar Visits	Member Info - Active Name: Cle MCO Name: Pe



Member Management – View Info

• Member Module – Profile Page (from MCO Demographic Info)

General	Member Info - Active				
Profile	Name: Schultz Gewendolin	Nurse:	Frequency:	Payer Coordinator:	
Authorization	Payer Name: ACPA CHC Training	Admission ID: 191827467	Member ID:	DOB: XX/XX/XXXX	
Insurance	Payer Name: ACPA CHC Haining	Admission 1D: 19182/48/	Member 1D:	DOB: ^// ^/ ^ ^ ^	
Special Requests					_
Master Week	Profile				
Calendar	Demographics				History
Visits	Demographics				<u>HISTOLY</u>
POC	First Name: Gewendolin		Middle Name:		
Clinical	Last Name: Schultz		Member ID:		
Info	Gender: Female		DOB: XX/XX/	/XXXX	
Search			Medicaid Number:		
First Name:	Address				<u>History</u>
Last Name:	Street 1: XXX		Street 2: XXX		
Admission	City: Philadelphia		State: PA		
ID:	Zip: 19019		Cross Street:		
🚽 Go 🕨	Home Phone: 215-789-9182				
	Phone 2:		Description:		
	Phone 3:		Description:		
	Billing/Service Rate Address				
	Address 1: XXX		Address 2: XXX		
	State:		County:		
	City:		Zip Code:		
	Emergency Contact Information				History
	Name:		Relationship:		
	Address:		Phone 1:		
	Phone 2:		Filone 1.		
	Name:		Relationship:		
	Address:		Phone 1:		
	Phone 2:				
	Emergency Preparedness (Payer)				
	Payer Priority Code:		Payer TAL:		



Member Management – Authorizations

• Process (Timing varies by MCO)

- Authorization with Provider matched to Member in HHAX
- HHAX sends back confirmed placement file which confirms provider acceptance
- Review Authorization as necessary (Member \rightarrow Authorization Page)

<u>General</u> Profile	Member Info	- Active								
Authorization		lame: Schultz				Nurse:Frequency:Admission ID: 191827467Member ID:		Frequency: MCO Coordinator:		
Special Requests	MCO N	lame: ACPA (CHC Training					D:	DOB: XX/XX/XXXX	
Calendar										
Visits										
POC	🎽 Authorizati	ion								
Search	Auth. #	From Date	To Date	Service Type	Service Code	Authorization Type	мсо	Service Category	Notes	Visits/
First Name:						Entire Period Entire Period Hours:				Invoice
Last Name:	P000908765	09/01/2018	02/28/2019	ННА	T2025	962.00	ACPA CHC Training	Home Health		S Update
Admission		•			,	•		•		





Communication & Notes



Communications – Overview (Types)

Member Notes

(Communication between Provider and MCO related to a Member)

Automated Notes

(System Generated Notes, such as Authorization and Status Change)

MCO Communications

(Communications between Provider and MCO *not* related to a Member)

Member Notes - Review

Home Page → Notes (Status = Open)

Notes	Date	From	<u>To</u>	Note	Reason	<u>Status</u>
	10/17/2018 5:09:44 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Can you please provide the IDs and DOB of the 3 members for which you are awaiting placement?	Communication	Closed
	10/17/2018 5:02:15 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Schedule might change based on patient's preference.	Communication	Open

Member → General Page → Notes
 (All Statuses – Open and Closed)

Member General							0.3.1 TELXWEB08
General	Member Info - Ac	tive					
Profile Authorization Special Request	1	Name: HUNTER EUGENE Payer Name: UPMC Health Plan Den	no	Nurse: Admission ID: 7428428262	Frequency: Member ID: 7428428262	Payer Coordinator: DOB: XX/XX/XXXX	
Master Week Calendar	General						History
Visits		Anna	and the part	- combrand	and the second second		
Note	<u>Date</u>	From	<u>To</u>	Note		Reason Status	New
Note	5 <mark>Date</mark> 10/17/2018 5:09:44 PM	<mark>From</mark> UPMC Health Plan SE Demo	To Ohana Health Plan Demo - Demo		OB of the 3 members for which you are awaiting	Reason Status Communication Closed	New Close Reply Print



Member Notes – Create and Respond

- Create (New) See next slide for details
 - From Member \rightarrow General Page only
 - Member \rightarrow General Page \rightarrow Notes Section \rightarrow New
- Reply
 - From Home: Home \rightarrow Notes \rightarrow <u>Reply</u>
 - From Member: Member \rightarrow General Page \rightarrow Notes Section \rightarrow <u>Reply</u>
- Close
 - From Home: Home → Notes → □ + [Save] (checkbox to left of Note) (Once closed, Notes will be removed from Home Page)
 - From Member: Member \rightarrow General Page \rightarrow Notes Section \rightarrow <u>Close</u>

Member Notes – Create Notes

Member \rightarrow General Page \rightarrow Notes Section \rightarrow mem

- **Complete Notes Window**
 - Select Reason
 - Enter **Note**
 - **Upload File** (if necessary) $\square \rightarrow \square$
 - Click (Note Status = Open)
- Note Reason Values
 - Varies By MCO

<i>e</i> HHAeXchange - Me	mber Note - Internet Explorer
Notes	
Date:	11/21/2017 4:20:07 PM
From:	seniorcaredemo 👔
* Reason:	Calendar Note
(Save Cancel



Member Notes – Print

• Print Individual Notes (send to non-system users)

- **Print** to obtain hardcopy of Individual Note (PDF)
- **Print Notes Report** (Report \rightarrow Other Reports \rightarrow Member General

📩 нн	AeXchange			N	1ember Ge	eneral Notes					Page 1 of≬
	,, <u>,</u>								Report	Date: 12/07/	2017 10:4
		From Date:	11/1/2017				To Date: 12	/7/2017			
		MCO :	Health Plan - T	raining			Member Name: All				
	Linked N	lotes From:	Health Plan - T	raining		L	inked Notes To: All				
		Reason:	All				Calendar Notes: No				
	Member Gen	eral Notes:	Yes			Mis	sed Visit Notes: No				
Vi	sit Caregiver	Comments:	No				Coordinator : All				
								Type o PG CN VCC MVN	Calendar N	eneral Notes lotes iver Commer	nts
Status	Created Date	Created By	Adm ID	Member Name Caregiver Name	мсо	Note	Reason	Closed By	Closed Date	To Name	Type of Notes
Closed	12/05/2017 09:32	upmc (UPMC Health Plan - Training)	01614661301	VOLZ VICKIE	UPMC Health Plan - Training	Authorization will be corrected within 3 business days. 30 hours per week can be used	Authorization Edit	riversuppor t (Riverwood Demo)	12/05/2017	Riverwood Demo	PG
Closed	11/17/2017 09:45	upmc (UPMC	01614661401	SAGER AMY	UPMC Health Plan -	Yes. Correct is 373 Main St, Altoona	Authorization Edit	riversuppor	11/17/2017	Riverwood Demo	PG



MCO Communications – Review/Create

Search/Review

• From Action \rightarrow MCO Communication

From Date:	All	~	Message Type: All To Date:	Status: All V Re	ason: All		×	
From Date.			To bate.	Search				
							_	
New Search Rest	ilts (4)						Pa	ge 1 o
MCO		Created Date	Reason	Note	Status			
MCO Pennsylvania Top MCO - PA	0	10/08/2018	<u>Reason</u> Communication	Note Please note that the updated billing process takes effect in the next cycle.		Close	Reply	
	() ()	10/08/2018 11:46:47 AM				<u>Close</u> <u>Close</u>	Reply Reply	
Pennsylvania Top MCO - PA		10/08/2018 11:46:47 AM 10/08/2018	Communication	Please note that the updated billing process takes effect in the next cycle.	Open			

- Create (New)
 - Reason (by MCO)

F	
	rom: Pennsylvania Top MCO - PA
* Rea	son: Communication 🗸
* N	lote: Continue scheduling with usual caregiver.
	(Upto 500 Characters)
gent Mess	
Upload	File: 🔯
	Save Cancel
	Save Cancer

- Inbound Note
- Outbound Note
- Attachment


MCO Communications – Print

Perform Search \rightarrow Right-click to Print \rightarrow Print Page(s)

🔆 HHA eXchange	Home Mo	ember Caregiver Visit Action Billing Report Admin		Preview	1 Page View	Shrink To Fit V			× 0
MCO Communications							+ +		+ +
MCO Communications				🖶 Print			HHAeXchange - MCO Communications	s Page 1 of	1 1
MCO: A		Message Type: All To Date:	▼ ■ Search	General Options Select Pinter		A Microsoft Print to PDF	Nome Member Car KHKAeXchange Report Admin	regiver Visit Action Billing Support Center Logos Welcome - seniorcaredomo (Senior Care	-
New Search Results (4)				DCP-L5650		Microsoft Print to PDF Microsoft XPS Documen Send To OneNote 2016	MCO Communications	P Limited 6.0.1 TELXWEBI	.0
MCO	Created Date	Reason	Note	<		>	MCO: All Message All	Status: All]
Pennsylvania Top MCO - PA	0 10/08/2018 11:46:47 AM	Communication	Please note that the updated b	Status: F	leady	Print to file Preferences	Date: To Date:	Search	
Pennsylvania Top MCO - PA	0 10/08/2018 11:45:06 AM	Communication	Action required on pending Pla	Location: Comment:		Find Printer	New Search Results (4)	Page 1 of 1	
Pennsylvania Top MCO - PA	10/16/2018 12:39:56 PM	Calendar Note	Schedule coordination for the n	Page Range			MCO Created Reason	Note Status	
Pennsylvania Top MCO - PA	04:24:01 PM	Communication	Thanks for the quick placement	 Al 		Number of copies: 1	Pennsylvania Top MCO - PA PA	Please note that the updated billing process takes effect Open Close Repty	
* * * * * * * *	* * * * * * * *	Back Encoding Print Print preview Refresh Append to Existing PDF Convert to Adobe PDF Export to Microsoft Excel Send to OneNote Properties				Print Cancel Apply	https://app.hhaexchange.com/STD06000	Actor required on pending Risomerits. Open Caller State Senable coordination for the month is in progress. Open Thereis for the quick plasmenter acceptance. It has helped Open Caller State in Includes our census 100011/Action PayerCommunications.aspx?Versi 11/28/201 of 1	



Communication Policy and Timeframes

- Varies by MCOs
- Covered During Afternoon MCO Sessions
 - Communication Policies for usage
 - Expectation for Monitoring Notes
 - Timeframes for Reply (Urgent Notes vs. Non-Urgent Notes)



Caregiver Management (EVV & Visit Quick Entry)



Caregiver – EVV and Manual only



Adding Caregivers – Data Entry

- New Caregiver
- Required Fields
 - Demographics (Employment Type)
 - Address
 - Emergency
- Save
 - Creates Profile

<mark>米 HHA</mark> eXchange	Home	Member	Caregiver	Visit	Action	Billing	Report	Admin			Support Center Logou pport (Riverwood Demo
New Caregiver	_		New Caregiv Search Care								
Demographics											
* First Name	-								Middle Name:		
* Last Name * Gender		~							* Initials: * DOB:		
* Gender								Alt (Caregiver Code:		
* Status									jiver Mobile ID:	i	
* SSN#:	(e.g. xxx-	xx-xxxxx)							obile Device ID:		(i)
* Primary Patient Team	Rehim	e Date:		H				* Emj	PCA LPN ST Ployment Type: PA APC ILST ESC Otho		OT V HSK RT S CNA I SCI S CRSP CBSA
Address Street 1: City: Zip: Phone 2:		-							Street 2: State: Home Phone: Phone 3:		
Emergency Name: Address: Phone 2:									Relationship: Phone 1:		
Name: Address: Phone 2:		-							Relationship: Phone 1:		
						Save	Cancel				



EVV

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Caregiver – Profile Overview

- Demographics
- Employment
- Address
- Emergency

Caregiver Info					
Profile	Caregiver Info				
Restrictions	-	Caregiver Code: 1005	DOB: XX/XX/XXXX	Discipline: RN, LPN, PT, OT, ST	
Compliance	Name: Drown Mike	Caregiver Code: 1005	DOD: ^^/ ^/ ^^/	Discipline: RN, LPN, PT, 01, ST	
Visits					
Calendar	Profile				
	FIGHE				
	Demographics				History
	* First Name:	: Mike		Middle Name:	
	* Last Name:	: Brown		* Initials: BM	
	* Gender:	MALE		* DOB: XX/XX/XXXX	
	* Caregiver Code:	: 1005	1	Time & Att. PIN: 100005	
	Alt. Caregiver Code	:		* Status: Active	
	* SSN#:	XXX-XX-XXXX		Start Date:	
	Rehire	No Rehire Date:	* En	ployment Type: RN, LPN, PT, OT, ST	
	(i) Caregiver Mobile ID:	1	(i) M	obile Device ID:	
	Ethnicity			* Hiring Status: Employee	
	* Primary Patient Team	: Default		2	
	Employment Info				History
	HHA/PCA Registry Number	•	Added/Checke	d Registry Date:	
	Address				History
	Street 1	• xxx		Street 2: XXX	
	City			State:	
	Zip			Home Phone:	
	Phone 2	:		Phone 3:	
	Emergency				History
	Name	:		Relationship:	
	Address			Phone 1:	
	Phone 2				
	Name			Relationship:	
	Address Phone 2			Phone 1:	
	Phone 2	•			



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Schedule Management (EVV)



Scheduling – EVV only



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Scheduling Visits – Requirements



• Member Status = Active

				Member Info- Active
elli	MCO Coordinator: Eliza Torelli	Frequency:	Nurse:	Name: Poe John
XXX	DOB: XX/XX/XXXX	Member ID:	Admission ID: 12345678	MCO Name: PA Health & Wellness
XXX				Authorization =

Authorization									
Auth. #	From Date	To Date	Service Type	Service Code	Authorization Type	Paver	Service Category	Notes	Visits/ Invoice
1234567	09/01/2018	01/01/2019	HHA	T2025-SE1	Weekly Weekly Hours: 30.00	PA Health & Wellness	Home Health		Update

• Plan of Care (POC)

- Can be added to member
- Caregiver can clock in and record the duties

POC Number: 2292519		POC Start Date: 10/01/2	017		POC End Day	
Category	Task Number	Description	As Needed	<u>Times a Week</u>	Instruction	
Personal Care	100	Bath-Tub	Yes	1-7		
Personal Care	101	Bath-Shower	Yes	1-7		
Personal Care	106	Mouth Care/Denture Care	Yes	1-7		
Personal Care	107	Hair Care-Comb	Yes	1-7		
Personal Care	108	Hair Care-Shampoo	Yes	1-7		
Personal Care	109	Grooming-Shave	Yes	1-7		
Personal Care	110	Grooming-Nails	Yes	1-7		
Personal Care	111	Dressing	Yes	1-7		
Personal Care	112	Skin Care	Yes	1-7		
Personal Care	113	Foot Care	Yes	1-7		
Nutrition	205	Prepare Snack	Yes	1-7		
Activity	302	Patient walks with assistive devices	Yes	1-7		
Activity	305	Assist with home exercise program	Yes	1-7		
Treatment / Special Needs	405	Take Blood Pressure	Yes	1-7		
Patient Support Activities	500	Change bed linen	Yes	1-7		
Patient Support Activities	501	Patient Laundry	Yes	1-7		
Patient Support Activities	502	Light Housekeeping	Yes	1-7		
Patient Support Activities	508	Accompany Patient to medical appointment	Yes	1-7		



Scheduling Visits – Functionality



• Creating a Visit (Non-Skilled/Skilled)



Schedule Components

Non Skilled Visit	User update
Admission ID: 12345678	Member Name: Poe John
Visit Date: 10/21/2018	Member Phone #: 215-555-6677
Assignment ID: 100007	Coordinator: Julie Ann Compton
Schedule Visit Info Bill Info	
chedule	A History
* Schedule Time: 1630 - 1830	Caregiver Code: 1007 2 Blake Christopher
POC: 2292564-10/16/17	Assignment ID: 100007
* Service Code: T2025-SE1	4
* H: 02 M: 00	
Bill Type: Hourly	•
	ave

- **1. Scheduled Time**
- 2. Caregiver
- 3. Optional: Plan of Care (POC)
- 4. Service Code
- 5. Save Schedule



Scheduling Visits - Calendar



• Member Calendar (Member → Calendar Page)





COLOR CODES:

Green

Pink



Scheduling Visits – Deleted Visits

- Schedule created in error
- Process
 - Delete from Calendar
 - Capture Reason for Deleting Visit





Scheduling Visits – Master Week



"Permanent S "Roll Over"	Schedule"	HHA Exchange - Add/Edit Mast Add/Edit Master Week () * From Date: Copy Master Week Se Hours: Caregiver: cit Service Code:Se		Date:
HHA Exchange - Add/Edit Masterweek Add/Edit Master Week Add/Edit Master Week	HHA Exchange - Select Days Select Days Hours: 1200 1600 Caregiver: 1000 2 2 Temp Temp Ass.ID: 010101 POC:SelectV H:04 M:00 Service Code: W1793 V 3 Hourly Save Close	Saturday Sunday ✓ Monday ✓ Tuesday ✓ Wednesday ✓ Thursday ✓ Friday	1. 2. 3. 4. 5.	Ho Ca So So So

- I. Hours (per day)
- 2. Caregiver

.

- **3. Service Code**
- 4. Selected Days
- 5. Save "Permanent Schedule"



Visit Entry (EVV, Visit Quick Entry, EDI)



Visit Entry Options - EVV, Manual, & EDI



50

ΈVV

Manua EDI



Visit Management (EVV)



Visit Management - EVV

- EVV Configuration
- Placing EVV via Phone
 - Clock In
 - Clock Out

K HHAeXchange	
The Call In (Start of Visit)	
	3 of 8

Successful EVV





Visit Management – Missed Visits

- Visit Does Not Take Place (not a "Scheduling Input Issue")
- Process
 - Edit Visit Information and select *Missed Visit* checkbox
 - Capture Reason, Action Taken, and Note

	Schedule Visit Info Bill Info	
	Visit Information History	istory
	Scheduled Time: 1200-1500	
S:1200-1500	Visit Start Time: 12/11/2017 📰 Visit End Time: 12/11/2017 📰 Link Calls	
<u>V:-</u>	Missed Visit:	
B: N Kline X	* New Reason: Select	
Rosemary	New Note:	
	Prebilling Problem(s): Caregiver Compliance, Unverified Visit, POC Compliance	
	Save Close Print	



Visit Management – Manual Visit Confirm

- 1. Visit Info Tab
- 2. Visit Start Time
- 3. Visit End Time
- 4. Reason
- 5. Action Taken

Schedule	Visit Info	Bill Info
Visit Information		
Scheduled Time:	0800-1200	8
V <mark>isit Start Time:</mark>	0800 11/03/2017	Visit End Time: 1200 11/03/2017
Missed Visit:		Travel Time Request:
* New Reason:		* Action Taken: Timesheet received and signe
New Note:		\diamond
Prebilling Problem(s):	Caregiver Compliance, Unverified Visit	t, POC Compliance
		Save Close Print



Visit Management – Manual Visit Confirm

- 6. Timesheets
 - Required
 - Approved
- 7. POC Duties (Plan of Care)

Γ	Audit											
	Verified By: Member Caregiver Family Member Other											
Date Verified: Time Verified: Supervisor:												
h	Duty Sheet POC:7(00:00) Others:0(00:00) Total:7(00:00) 6											
✓ Timesheet Required ✓ Timesheet Approved												
	POC Du	ities	Duty Number	Category	Duty							
			201	Nutrition	Patient is on a prescribed diet							
			202	Nutrition	Prepare-Breakfast							
			203	Nutrition	Prepare-Lunch							
			204	Nutrition	Prepare-Dinner							
			205	Nutrition	Prepare Snack							
			206	Nutrition	Assist with feeding							
	\checkmark		207	Nutrition	Record intake - Food							
			208	Nutrition	Record intake - Fluid							
	✓		411	Treatment / Special Needs	Remind to take medication							
			412	Treatment / Special Needs	Assist with Treatment							
			506	Patient Support Activities	Do Patient shopping and errands							

Visit Management – View EVV Visits

- Visit Search (Visit \rightarrow Visit Search)
- Member Calendar (Member \rightarrow Calendar Page)



Visit Management – Call Dashboard



• Searching for Call Issues (Exceptions)

Call Maintenance		(11) Call Maintenance	2 (10) Missed In	2 (0) Missed Out	2 (155) Missed Call	2 Visit Log	Rejected Calls	- Linnon 4.5.5.4 (ELAn	TE HUS
Call Maintenance	-								
Caregiver First Name:		Caregiver Las	t Name:		Caregive	r Code:		Assignment ID:	
Admission ID:		Patient First	st Name:		Patient Last	t Name:		Coordinator: All	~
Status:	Select	✓ Patier	nt Team: All	~] Patient Lo	ocation: All	~	Patient Branch: All	~
From Date:	05/01/2016	[ННММ]	To Date: 06/30/2016		[ННММ]				
	374300487			Search	View Report				

- Understanding Call Maintenance "Buckets"
 - Call Maintenance
 - Missed Calls (In/Out/Call)
 - Visit Log and Rejected Calls



Visit Management – Call Dashboard



Addressing Call Issues (Exceptions)

Call Maintenance			(11) Call Maintenance	2 (10) Missed In	2 (0) Missed Out	2 (155) Missed Call Visi		og E	2 lejected Calls		
all Maintenas:	*///						11		111		 1111
Search Results		2)									Legend
Assian. ID#	Caregiver	Caregiver Name	Caregiver Pho	HE	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	Action
Assign. ID#	Code	Caregiver Name Roberts Susan	Caregiver Pho Phone1 : 212-: Phone2 :		Patient Name Smith Mike (3453453)			Call Type	Caller ID 201-895-6191	Out of Windo	 Action Reject

Fixing Call Issues

- Linking Calls
- Rejecting Calls





Visit Management (Visit Quick Entry)



Manual

Visit Quick Entry (Visit -> Visit Quick Entry)

Visit Quick En	try												
Select Memb	er												
	* мсо: Ц	JPMC	Health Plan -	Training N	/	* Member	RUSH GARRY (3	137242, 01614	66180 🗙 🗩 Search	Clear			
Active Autho	vizations (-90 I	Days)										
Show All													
Auth. #	From Dat	e_	To Date	Service Category	Service Typ	e	Service Code	Authoriza	tion Type	MCO		Notes	
Auth 3	08/01/20	17	08/01/2018	Home Health	PCA	_	W1793	Weekly Weekly Hours: 48.50		UPMC Health Plan - Training			S
Auth 1	08/01/20	15	08/01/2016	Home Health	LPN		T1003SE-SW1	Weekly Weekly Hours: 54.50		UPMC Health Plan - Training			
Auth 2	08/01/20	16	08/01/2017	Home Health	RN T1		T1002SE-SW1	Weekly Weekly Hours: 47.50		UPMC Health Plan - Training			
Visit Date 🕇			Service Code		Visit Start	Visit End	Duration		Caregiver		Authorization Nu	mber	
10/18/2018	В	Ê	T1002SE-SW	1 v	0800	1100	03:00		Brown Mike	× 🔎			3 Delete
Visit Date		₿	Select	~	Visit Start	Visit En	d	Duties (0)	Select Caregiver	,œ			B Delete
											Preview Author	rization	+ Add
							Create Visit						





Visit Management (EDI)



3rd Party Interfaces

- One file to send the following:
 - Caregiver Information
 - Schedules
 - Visit Confirmation
 - Billing information (invoice numbers)
- EVV information (telephony, GPS, other)
 - Recommended but not required for 1/1/19
 - OLTL will require EVV by Summer 2019



EDI

EDI Validation Tool and SFTP Creation

File Format Validation Tool

- Validates structural correctness and basic data formatting for Import files
- Successful format validation required before self-service SFTP creation

HHAeXchange File Format Validation Portal Home		
HHAexChange File Forn This tool is used to validate and ensure structural concertness as well as basic data formattil account is activited only after successful validation is completed. Note: (gen validation after a decarded put stored in any PEAK server)		FTP
	Result	
File Processe	I Result	
File Format Validation	9	
File Naming Convention Validation	-	
Text Qualifier Validation	4	
Column Count and Position Validation	-	
Mandatory Fields Validation	-	
Max Field Length Validation	More info	
Numeric Field Validation		
Date Format Validation		
Situational Fields Validation	4	
The Results indicate file errors under the specified Validation. Cli	k the <u>Nore Info</u> hyperlink to access details and guidance.	
😸 - Validation Error. 😹 - Validation Sk	pped. 🛩 - Validation Success.	
	Fini	sh

Self Service SFTP Creation

- Eliminates need for EDI providers to contact HHAX to manage SFTP sites
- All EDI providers can create, configure and manage their SFTP account for file transfers to HHAeXchange



EDI



Prebilling (EVV & Visit Quick Entry)



Visit Entry Options - Workflow by Choice



Prebilling

EVV Manual

Prebilling Process

- Billing \rightarrow Prebilling Review
- Exceptions (Problems)

Admission ID:	Member Team: All	Coordinator: All
Caregiver Name:	From Date:	To Date:
🗹 With Temp Caregiver 🗹 Caregiver Compliance 🛛 🗹 POC Complian	nce	
Searc	ch View Report	
	Caregiver Name:	Caregiver Name: From Date:

Prebilling Validations

- Review Exceptions (focus on Missed Visit and Authorizations)
- Address in HHAX (EVV, Manual Visit Quick Entry) or 3rd Party System (EDI)

Billing (EVV & Visit Quick Entry)



Visit Entry Options - Workflow by Choice





Billing – Process Overview

Billing Processes

- Create Invoice Batch
- Perform Billing Review
- Address in HHAX (EVV, Manual Visit Quick Entry) or 3rd Party System (EDI)

Reviewing Billing Files

- Claim Files (837)
- Remittances (835)

Rebill process

- Select, Adjust, Submit
- Must have claim number from remit (i.e. TRN)



Billing – Create Invoice Batch

Billing → New Invoice Batch

- Search for Billable Visits (Filter by Date Range and Payer)
- Select Visits to Invoice (to be included in Invoice Batch)

			ate: 09/01/2016 tal: 0 Amount: :	\$0.00 <u>Refresh</u>			E	Batch Number: 4	016LION000	10	
Billa	ble Visits										
	From Date:	:		To Date:		* Payer: Tig	er Care DEMO PAYE	R 🔻		Search	
Sea	rch Results (19)									
	Date 6	Caregiver	Admission ID	Patient Name	Visit	Visit Hrs	Visit Rate	TT Hrs	TT Rate	Amoun	t
	06/06/2013	Bush Alfred Reginald	LIO-1234567892	Jackson Jarrell Austin	1200-1700	05:0	0 \$10.0	0		\$10.00	\$50.00
	04/03/2016	Lambe ML Maherb	LIO-ADM432	Jagan SJ Suresh	1600-1800	02:0	\$10.0	0		\$0.00	\$20.00
	04/J5/2016	ush afre Reginald	<u>LIO-1234507892</u>	Jackson Jarreli Ausbri	0860-1350	05:0	0 \$10.0	0		\$0.00	\$50.JO
	04/05/2016	Looney Goerge		Jagan SJ Suresh	1600-1800	02:0	\$20.0	0		\$0.00	\$40.00

Save Selected Visits (Save & Next Select All &

Click

Invoice Batch (Generates "Batch" of invoices; 1 per Visit/Member)



EV\

Billing – Perform Billing Review

Billing → Billing Review

Search for Invoiced Visits

Billing Review	100244									Limited 4.5.5.4 7
Billing Review Sea	rch									
View: O Summa	ry View 🕚	Detail View 🛈								
Search Results (15	en Tion Can D		Coo Mina Pr			S vice co			₩ BM Drs	er (* * * * * * *
Invoice Number 5	Invoice Date	Admission ID	Patient Name	Contract	Coordinator	Visit Date	Service Code	Units	Amount on Hold	Hold Reasons
600094	05/11/2016	242424242424	Woodson, Charles	Tiger Care DEMO PAYER		02/08/2016	HHA H1	0.00	\$20.00	Missing Patient Address, Missing Patient City, Missing Patient State, Missing Patient ZipCode, Manual Hold : Wrong Visit
600095	05/11/2016	<u>NW153754</u>	Woden, Neptunus	Tiger Care DEMO PAYER	Jim Schwartz	01/05/2016	HHA H1	0.00	\$20.00	Manual Hold : Wrong Visit
600099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	09/22/2015	HHA H1	0.00	\$10.00	Missing Patient State
600099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$60.00	Missing Patient State
600101	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$40.00	Missing Patient Address, Missing Patient City, Missing Patient State, Missing Patient ZipCode
<u>600101</u>	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	11/03/2015	HHA H1	0.00	\$40.00	Missing Patient Address, Missing Patient City, Missing Patient State, Missing Patient ZipCode

- Address Exceptions (Hold Reasons)
 - In HHAX (EVV, Manual Visit Quick Entry)
 - In 3rd Party System (EDI)



EV\
Billing – Reviewing Billing Files

EVV Manual

- Nightly Processes (837 Generation)
- Reviewing Billing Files (Admin → File Processing)
 - Claim Files (837)
 - Remittances (835)

File Processi	File Processing									
Claim Files	Claim Files Remittances									
Download Fi	les									
	File Type:	837 Claim File	P	All		~	Processed From:	Processed To:	B	
Invo	ice Batch Number:		File Na	ame:						
					s	earch				
Search Resu	lts (35)									
									12	
File Type	Claim Type	MCO	Invoice Batch	Member #	Claim #	Claim Amount	File Name	Processed Date/Time		
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWDP00036	1	1	\$13.00	CLM10131447400035_12062017_033514.txt	12/6/201 B:35:14 PM	Detail Summary Export	
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWDP00035	1	1	\$10.00	CLM10131447400034_12052017_030021.txt	12/5/2017 3:00:21 PM	Detail Summary Export	
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWDP00034	1	1	\$86.00	CLM10131447400033_11292017_093017.txt	11/29/2017 9:30:17 AM	Detail Summary Export	
837 Claim File	Original Claims	UPMC Health Plan - Training	14474RWDP00033	1	1	\$86.00	CLM10131447400032_11212017_050513.txt	11/21/2017 5:05:13 PM	Detail Summary Export	



Billing – Rebill Process

- Billing \rightarrow Electronic Billing \rightarrow Batch Search and Resubmit Claims
- Add claims for resubmission

					HHAeXchange - Clain	n Search										×
					Search											
					Batch Number		Invoice Number:			Service Code:		•	Admission 1	0:		
					Last Name	e ≪M/d/yyyy> ■	First Name: Visit To: <14/6	(formation)		Claim Status:	All	•				. 8
						a solution and										
esubmit claim	s E-submission	Batch							Search							-
ayer: Demo N	1L		Batch N	lumber: CLMO	0930000401424	Batch D	ate: 10/30/2	018		-	-	-	-		Add	d Clair
submit Claim	s Search															Leg
ch Results (5))	Delay Reas	on Code : Se	lect		v Visits	Older Than :	90							Pag	je 1 of
									Visit	Billed	Billed	Bill	Billed			
ch Number	Admission ID	Patient Name	Visit Date	Invoice No	Service Code	Caregiver Name	Schedule	<u>Visit</u>	Hours	Hours	Units	Type	Amount	ST	TRN	
4DVN200213	DVN-	Brooks Steven	06/03/2014	395423	Daily1	Rosa Martinez	0200-0300	0200- 0300	01:00	01:00	1.00	Hourly	\$0.00	0		ø
	DVN-	Brooks Steven	06/04/2014	395427	Rate1	Rosa Martinez	0800-0900	0800- 0900	01:00	01:00	1.00	Hourly	\$12.50	0		ľ
4DVN200215								0900								
	DVN-	Brooks Steven	05/07/2014	395418	Rate1	Bav Raj	0900-1000	0900- 1000	01:00	01:00	1.00	Hourly	\$12.50	0		Ľ
4DVN200215 4DVN200210 4DVN200216	DVN-	Brooks Steven Shah Nirma	05/07/2014 12/07/2015	395418 395428	Rate1 Rate1	Bav Raj Shamim Patel	0900-1000	0900-	01:00	01:00	1.00	Hourly	\$12.50 \$12.50		555555	ľ

Export and Download 🛈 Cancel



EVV

Manu





Reporting – Key HHAeXchange Reports

List of Members

- Census Information (Data from Member Module)
- Batch Detail Report
 - Revenue Generation (by Individual Invoice Batch)
- Unverified Visits Aging Detail
 - Listing Visits with Exceptions (before Prebilling processes)
- Member General Notes
 - Listing of Notes captured in HHAX (Related to Member Services)
- List of Caregivers

Reporting – Overview of Report Layout

Report Generation and Navigation

14 4	1 of 1	ϕ $ \langle \phi \rangle$		Find Next 🛛 🛃 🔹 🚱	1						
📩 нн	AeXchange			Membe	r Genera	al Notes			Pag	e 1 of 1	
~	_							Report Da	te: 11/30/201	17 15:10	
	F	rom Date: 11/1	/2017			To Dat	te: 11/30/2017				
		MCO: All				Member Nam	ie: All				
	Linked No	tes From: All			2	Linked Notes 1	o: All				
		Reason: All			-	Calendar Note	es: No				
'	Member Gene	ral Notes: Yes				Missed Visit Note	es: No				
vi	isit CaregiverC	omments: No				Coordinator	: All				
Status 🛟	Created ‡ Date	Created By 🛊	Adm ID	Member Name ‡ CaregiverName	мсо ;	Note	Reason ‡	Closed By 🛊	Closed ‡ Date	To Name	Type ‡ of Notes
Open	11/13/2017 13:32	seniorcaredemo (Senior Care - PA)	11285866703	Fitzgerald Craig	Pennsylvania Top MCO - PA	Vednesday(1200-1600)] (Type: Temporary, From Date: 11/01/2017, To Date: 11/01/2017, Replacement Aide: Walker Jessica)	change in service			Pennsylvania Top MCO - PA	PG
Open	11/07/2017 09:51	seniorcaredemo (Senior Care - PA)	58579642107	Keller Liam	Pennsylvania Top MCO - PA	(Type: Permanent, Replacement Aide: Robertson Rebecca)	change in service			Pennsylvania Top MCO - PA	PG
Open	11/13/2017 14:38	seniorcaredemo (Senior Care - PA)	58579642107	Keller Liam	Pennsylvania Top MCO - PA	[Monday(1200-1600)] (Type: Temporary, From Date: 11/06/2017, To Date: 11/06/2017, Replacement Aide: Blake Christopher)	change in service			Pennsylvania Top MCO - PA	PG
Open	11/21/2017 16:35	seniorcaredemo (Senior Care - PA)	58579642107	Keller Liam	Pennsylvania Top MCO - PA	Continue scheduling with usual Caregiver.	Calendar Note			Pennsylvania Top MCO - PA	PG

- 1
- 2

3

User Search Criteria (Middle)

Report Data (Bottom)

Navigation Bar (Top)

System Reports



Reporting – List of Members

Path: Report \rightarrow Members \rightarrow List of Members

	HHAeXchange rt Date: 12/07/2				<u>List of Members Ent</u>		
Ad	mission ID:		Member	ID:	Status: Active	Coordinator: All	Priority Code: All
	Last Name:		First Nar	ne:	Phone Number:	Primary MCO: All	Discipline : All
	Branch: All		Sort	By: LastName	Nurse: All	Team: All	
L	Location: All	-		No Display D	uplicate Member: No		
	Admission ID	First Name	Last Name				
1	22699578804	Maritza	Ramos				
2	31124778521	Amelia	Bernt				
3	15678892101	Bob	Flowers				
4	12442115906	Emma	Green				
5	36358874722	Matthew	DeRossi				
6	11285866902	Ginny	Gordon				
7	58579642107	Liam	Keller				
8	65225115426	Wyatt	Clerge				
9	11285866703	Craig	Fitzgerald				
10	12345678	John	Poe		_		
~~~~	the second se						

### **Reporting – Batch Detail Report**

#### Path: Report $\rightarrow$ Billing $\rightarrow$ Invoicing $\rightarrow$ Batch Detail Report

×	KHHAeXchange         Batch Detail Report									Page 1 of 32					
		5									Repor	Report Date: 12/7/2017 10:58:47 AM			
	Batch Number:         14474RWDP00021         Batch Date:         11/06/2017														
		Export Da	ite:					Invoice Co	unt: 1						
		Total Amou	int: \$231.03					Total Ho	urs: 15:00						
		Total OT Hou	Irs:					Total TT Ho	urs:						
		Total Visit Hou	Irs: 15:00					Provi	der: Riverwood	Demo					
		Status: Pending													
Sr. No.	Invoice Number	Member Name	Admission ID	Visit Date	Service Code	Caregiver Name	Caregiver Code	Employee ID	Billed Hours	OT Hours	TT Hours	Total units	Billed Amount		
1	600031	JOHNSTON JEREMY	01614661101	10/13/2017	T2025- SW1	Thomas Carl	1004		03:00			3.00	\$64.56		
2	600031	JOHNSTON JEREMY	01614661101	10/14/2017	S5150	Thomas Carl	1004		03:00			3.00	\$30.51		
3	600031	JOHNSTON JEREMY	01614661101	10/15/2017	T1005	Thomas Carl	1004		03:00			3.00	\$30.48		
4	600031	JOHNSTON JEREMY	01614661101	10/16/2017	T2025- SW1	Thomas Carl	1004		03:00			3.00	\$64.56		
5	600031	JOHNSTON JEREMY	01614661101	10/17/2017	W1792- SW1	Thomas Carl	1004		03:00			3.00	\$40.92		
	Total								15:00				\$231.03		



# **Reporting – Unverified Visits Aging Detail**

#### Path: Report → Compliance → Unverified Visits Aging Detail

KHHAeXchange         Unverified Visits Aging Detail         Page           Report Date: 12/07/2017         12/07/2017         12/07/2017											Report Da		
Provider Name	1			<3		3-7		8-14	15	-21	22-28	>28	
Riverwood Demo	)			0		3		21	2	1	22	26	
	Date: 11/7/2017	,				To D	ate: 12/7/20	17		Exclude	e Non Billable Visits	: Yes	
Tea	ams: All										DS : Duty s	heet required	
Total RowCoun	it: 83												
Sr Provider # Name	Admission ID	Member Name	Status	Caregiver Name	Visit Date	Agin g Day s	Schedule	Discharge Date	Team	Notes		DS	
1 Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/30/201 7	7	1200-1400		Default				
2 Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/28/201 7	9	1200-1400		Default				
3 Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/27/201 7	10	1200-1400		Default				-
4 Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/25/201 7	12	1200-1400		Default				-
5 Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/24/201 7	13	1200-1400		Default				-
6 Riverwood Demo	01614661801	RUSH GARRY	Active	Brown Mike	11/23/201 7	14	1200-1400		Default				
7 Riverwood	01614661201	RUSH GARRY	Active	Brown Mike	11/21/201	-16-	1200-1400	Lange and a start of the start	Default	~~ <u></u>			~~~~

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### **Reporting – Member General Notes**

#### Path: Report → Other Reports → Member General Notes

Page 1 of			neral Notes	ember Ge	M	K HHAeXchange							
Report Date: 12/07/2017 10:4								j-					
	<b>To Date: </b> 12/7/2017							I					
		Member Name: All			Training	Health Plan - T	мсо:						
		inked Notes To: All	L		Training	Health Plan - T	otes From:	Linked N					
		Calendar Notes: No				Reason: All							
		sed Visit Notes: No	Mis			Yes	eral Notes:	Member Gen					
		Coordinator : All				No	comments:	sit Caregiver (	Vi				
tes Values:	Type of					L							
ember General Notes	PG												
lendar Notes	CN												
sit Caregiver Comments	VCC												
ssed Visit Notes	MVN												
sed To Name Type of e Notes	Closed By	Reason	Note	мсо	Member Name Caregiver Name	Adm ID	Created By		Status				
05/2017 Riverwood PG Demo	riversuppor t (Riverwood Demo)	Authorization Edit	Authorization will be corrected within 3 business days. 30 hours per week can be used	UPMC Health Plan - Training	VOLZ VICKIE	01614661301	upmc (UPMC Health Plan - Training)	12/05/2017 09:32	Closed				
17/2017 Riverwood PG Demo	riversuppor t KBiverwood		Yes. Correct is 373 Main St, Altoona	UPMC Health Plan -	SAGER AMY	01614661401	upmc (UPMC Health Plan	11/17/2017 09:45	Closed				



# **Reporting – List of Caregivers**

#### Path: Report $\rightarrow$ Caregiver $\rightarrow$ List of Applicant/Caregivers

🔆 HHAeXchange					List of Applicants/ Caregiver					Page 1 of				
	5						-			Rep	port Date: 12	2/07/2017 04:		
Provider: Riverwood Demo					Type: All				Status: All					
From Date:						To Date:								
Discipline:	All					Team: All				Group By:	No Group			
	Caregiver Code	Alt. Caregiver Code	Discipline	Team	Date of Birth	Phone	Current Status	Current Type	Application Date	Hire Date	Language1	Language2		
Brown Mike	1005		RN, LPN, PT, OT, ST		XXXXX		Active	Employee						
Fried Gary	1001		HHA		XXXXX		Active	Employee						
Hamilton Kip	1010		PCA, HHA, Other (Non Skilled)		XXXXX		Active	Employee						
Loretta Johnson	1009		PCA		XXXXX		Active	Employee						
Richardson Rhan	1003		PCA, HHA, PA		XXXXX	718-406-4633		Employee	08/01/2017	09/01/2017	_	Creole		
	1009	100100	henry			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~	have	A1/2		han			



# Administration



# **Administration and System Support**

- Provider Profile
  - Email Alerts
- User Management
  - Roles
  - Permissions
  - Restrictions
- Coordinator Setup Must Add At Least 1 (Default)
- Provider Reference Table Management
- Rate Management

### **Administration – Provider Profile**

- Admin → Provider Profile
  - General Section
  - Address Section
  - Automatic Email Section







### **Creating HHAeXchange User Access**

Add New User		Limited 15.3.1.0 TELXWE
Add New User		
* First Name:	IP Restricted	IP1 : IP2 : IP3 :
* Last Name:	Hourly Restricted	Day From To IP 🚺
* Login Name: 🧻 🧿		Mon :
* E-mail:		Tue :
* Role: Select 🔻		Wed :
Default Home Module Tab: _ Link Communications _ System Notifications ()		Thu:
Status: Active 🔻 🚺		Fri :
		Sat :
		Sun :
Save	Cancel	

### **Administration – User Management**

• Admin  $\rightarrow$  User Management  $\rightarrow$  User Search  $\rightarrow$  *Edit User* 

Update User Account			
Update User Account			History
* First Name: Ryan	IP Restricted	IP1 : IP2 : IP3 :	
* Last Name: Rich	Hourly Restricted	Day From To IP 🛈	
Login Name: RiverWood		Mon :	
* E-mail: rri		Tue :	
Assign Roles: Admin		Wed :	
Member Team: All 💙 🚺		Thu :	
Status: Active		Fri :	
Change Password Unlock		Sat :	
		Sun :	
Save	Cancel		



### **Administration – Coordinator Setup**

#### Admin → Coordinator Setup

(Note: Must be at least 1 created for Placements!)

New Coordinator	
Coordinator Details	
*Coordinator Number:	11781
*Coordinator Name:	
Status:	Active 🗸
	Save Cancel



### **Administration – Reference Tables**

#### Admin → Reference Table Management

Reference Table Managemen	t		1000 G.J.J.O 775.370
Search			
* Reference T	able: Member Team	Search	
Search Results			Add
Member Team ID	Member Team	Description	Stus
<u>4152</u>	Default	Default	Active
<u>5215</u>	Toom 1	EW D1	Active
4151	HHAeXchange - Member Team Details	×	Active
	Member Team Details		
	* Member Team:		
	Description:	$\sim$	
	Status: Active 🔽		
	Save	Cancel	

### **Administration – Rate Management**

- Admin → Rate Management
  - View Only

Rate Management							
*MCO: Health Plan - Training V Search							
Billing Rates							
Status: Active	~		Discipline: All			Rate Type: All	
From Date: 12/7/201	From Date: 12/7/2017 To Date: 12/7/2017						
Search Search							
Service Code	Category	Service Type	From Date	To Date	Rate	Rate Type	<u>Status</u>
W1793	Home Health	PCA	01/01/2017	12/31/2017	17.52	Hourly	Active
W1759	Home Health	Other (Non Skilled)	01/01/2017	09/01/2018	10.01	Hourly	Active





# **Additional Users and Feedback**

- Think of additional users for training?
  - Hhaexchange.com/system-training
- Info Session Feedback Survey
  - Hhaexchange.com/info-session-feedback







# **HHAeXchange Provider Resources**

- Provider Information Center
  - <a>www.hhaexchange.com/PACHC</a>

- Support
  - <a>support@hhaexchange.com</a>