

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

HAexchange 8

Questions

Provider/Agency Name		Agency Phone:
Your Name:	Your E-mail:	
Questions Related to HHAeXchange:		



- 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



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Creating HHAeXchange User Access

Add New User		Limited 15.3.1.0 TELXWEB
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 Osystem 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	vider/ Agency Name: Your Name:					
hone#	Your Email:					
ease provide the fo	llowing information for attendees	of the system user training in your organization				
User First Name		User Last Name				
User First Name		User Last Name				
User First Name		User Last Name				
User First Name		User Last Name				
User First Name User Email		User Last Name				
User First Name User Email User First 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 automate	d notification email. Do NOT reply.
A new placement req	uest has been sent to you with the following details.
Payer Name	The loss we want
Start of service	
Cut of time	: Martin and an and
Address	the design fragment of the last track to be a set of the last to b
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	F
HHA Exchange	
This message and any a	ccompanying attachments contain information from Homecare Software Solutions LLC which is confidential or privileged
The information is inter	aded to be for the use of the individual or entity named above. If you are not the intended recipient be aware that any
disalogues conving dis	tribution serves of the contents of this information is prohibited. If you have accessed this a mail in across places patify the
disclosure, copying, dis	intollation of use of the contents of this information is promoted. If you have received this e-mail in error, please notify the
sender immediately by i	reply e-mail and destroy all c opies of the original message.

New Placement Request (Home → Pending Placements)

Но	me														ted 9.0.
[Link Communications	System	Notificatio	ns											
	Member Team: All		•	 Coor 	dinator:	All			~	Search					
				Note:	The "Co	ordinator'	' filter is o	nly applicable	for Events	nd Notes s	ection.				
	Pending Placements														
L	Admission ID S	Start Date	Stop [Date	Frequer	су	Servi	ice Cat.	Service	Гуре	Request Sent At	Status		Cut Off Time	MCO Name
1	<u>191827467</u> C	09/01/2018					Home	e Health	нна		10/17/2018 12:47:39 PM	Pending		12/25/2018 23:26:39 PM	ACPA CHC Train
Ļ					1	_					1			1	1
	Notes													Pa	ge 1 of
	From	Created Da	te Me	ember Name	2	Rea	ason			Note			MCO Name		Action
	KEYSTONE FIRST	10/17/2018	N/	(A)		Car	nmunicatio	an an		Can you	please provide the IDs and Do	OB of the 3 members	ACPA CHC 1	Fraining	Reply

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		Member ID: XXXXX		
		Admission ID: 191827467		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:		Frequency:		
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

Pending Placeme	nt Queue										
Member Team: All	~	Search									
Total Pending: 1		Total Accepted: 0	То	tal Staffed: 0	Total A	ccepted with no	o Masterweek: 1				
Pending											
										Pa	ige 1 of
Addmission ID	Start Date 👻	Stop Date	Frequency	Service Cat.	Service Type	Request Se	ent At	<u>Status</u>		Cut Off Time	MCO Name
											ACPA
191827467	09/01/2018			Home Health	нна	10/17/2018	3 12:47:39 PM	Pending		12/25/2018	CHC
										11:20:39 PM	Training
tarred with Tem	o Caregiver										
				No Acce	pted Member Found						
haffad											
tarreu											
				No Staf	fed Member Found						
	Mashannah										
accepted with No	Masterweek										
lame		Addmission ID	Start Date 6	Stop Date	Frequer	псу	Time Accepted		Payer Name		
UNTER EUGENE		7428428262	09/26/2018				09/25/2018 17:00:11 P	М	UPMC Health	Plan SE Demo	
							•				
					ок						

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

Member Management – View Info

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

Brafile	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 Special Requests	,				
Special Requests					
Master Week	Profile				
Calendar	Demographics				History
VISILS	Demographics				
Clinical	First Name: Gewendolin		Middle Name:		
Info	Last Name: Schultz		Member ID:		
100	Gender: Female		DOB: XX/XX	/XXXX	
Search			Medicaid Number:		
First Names	Address				History
First Name:	Address				HISTOLY
Last Name:	Street 1: XXX		Street 2: XXX		
Admission	City: Philadelphia		State: PA		
ID:	Zip: 19019		Cross Street:		
	Home Phone: 215-789-9182				
Go 🕨	Phone 2:		Description:		
	Phone 3:		Description:		
	Those St		Description		
	Pilling / Corvice Pate Address				
	billing/ Service Rate Address				
	Address 1: XXX		Address 2: XXX		
	State:		County:		
	City:		Zip Code:		
	Emergency Contact Information				History
	Nama		Beletienshin		
	Address:		Relationship:		
	Address:		Phone 1:		
	Phone 2:				
	Name:		Relationship:		
	Address:		Phone 1:		
	Phone 2:				
	Emergency Dreparedness (Daver)				
	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	1	Name: Schultz	Gewendolin			Nurse:	Freque	cy: MCO Coordinator:	
Special Requests	мсо	Name: ACPA (CHC Training			Admission ID: 191827467 Member ID:			DOB: XX/XX/XXXX
Calendar									
Visits									
POC	Authorizat	ion							
Cooreh	Authorizat		-	1	1			1	
Search	<u>Auth. #</u>	From Date	<u>To Date</u>	Service Type	Service Code	Authorization Type	мсо	Service Category	Notes Visits/ Invoice
Last Name:	P000908765	09/01/2018	02/28/2019	нна	T2025	Entire Period Hours: 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)

lotes	<u>Date</u>	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							Limited 9.0.	.3.1 TELXWEB08	
General Profile Authorization Special Requea Master Week Calendar Visits	Member Info - Ac	itve Name: HUNTER EUGENE Payer Name: UPMC Health Plan Dem		Nurse: Admission ID: 7428428262	Frequency: Member ID: 7428428262	Payer Coordinator. DOB:	: : xx/xx/xxxx	History	
Notes	Date	From	To	Note		Reason	<u>Status</u>	New	
	10/17/2018 5:09:44 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Can you please provide the IDs and D placement?	OB of the 3 members for which you are awaiting	Communication	Closed	Close Reply	Print
	10/17/2018 5:09:44 PM	UPMC Health Plan SE Demo	Ohana Health Plan Demo - Demo	Schedule might change based on pati	ient's preference.	Communication	Open	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
* Note: Urgent Message: Upload File:	Continue scheduling with usual Caregiver. Optional Urgent Message checkbox Attach a file
(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

N	0	t	e	S)
---	---	---	---	---	---

<u>ж</u> н	HAeXchange			М	ember Ge	eneral Notes			Report	P Date: 12/07/2	age 1 of 8 2017 10:42
		From Date:	11/1/2017				To Date: 12	/7/2017			
		MCO :	Health Plan - T	Training			Member Name: All				
	Linked N	otes From:	Health Plan - T	Training		L	inked Notes To: All				
	Reason: All				Calendar Notes: No						
	Member Gen	eral Notes:	Yes			Mis	sed Visit Notes: No				
	Visit Caregiver (Comments:	No				Coordinator : All				
	insit curegiver i						coordinator . All				
								Type o	f Notes Valu	les:	
					PG Member General Note					eneral Notes	
						CN Calendar Notes					
					VC				Visit Caregiver Comments		
								MVN	Missed Vis	it Notes	
							-				-
Status	Created Date	Created By	Adm ID	Member 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 Health Plan	01614661401	SAGER AMY	UPMC Health Plan -	Yes. Correct is 373 Main St, Altoona	Authorization Edit	riversuppor t ४ प्रांथerwoord	11/17/2017	Riverwood Demo	PG

MCO Communications – Review/Create

Search/Review

• From Action \rightarrow MCO Communication

From Dates	All	~	Message Type: All	Status: All V Rei	ason: All		~]
From Date.			To bate.	Search				
_								
New Search Rest	ılts (4)						Pa	ge 1 o
MCO		Created Date	Reason	Note	Status			
MCO Pennsylvania Top MCO - PA	0	Created Date 10/08/2018 11:46:47 AM	Reason Communication	Note Please note that the updated billing process takes effect in the next cycle.	<u>Status</u> Open	Close	Reply	
MCO Pennsylvania Top MCO - PA Pennsylvania Top MCO - PA	0	Created Date 10/08/2018 11:46:47 AM 10/08/2018 11:45:06 AM	Reason Communication Communication	Note: Rease note that the updated billing process takes effect in the next cycle. Action required on pending Recements.	Status Open Open	<u>Close</u> Close	Reply Reply	
MCO Pennsylvania Top MCO - PA Pennsylvania Top MCO - PA Pennsylvania Top MCO - PA	() () () ()	Created Date 10/08/2018 11:46:47 AM 10/08/2018 11:45:06 AM 10/16/2018 12:39:56 PM	Reason Communication Communication Calendar Note	Note: Pease note that the updated billing process takes effect in the next cycle. Action required on pending Placements.	<u>Status</u> Open Open Open	<u>Close</u> <u>Close</u>	Reply Reply	

- Create (New)
 - Reason
 (by MCO)

	rom: Pennsylvania Top MCO - PA
* Re	ason: Communication 🗸
*	Note: Continue scheduling with usual caregiver.
	(Upto 500 Characters)
gent Mes	sage: 🗌
Upload	File: 🚳
	Save Cancel
	and the second s

- 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							HHAeXchange - MCO Communications	s Page 1 of	1 1
MCO: A		Message Type: All To Date:	▼ ■ Search	General Options Select Printer		3 ⁺	Huma Mansher Car	regiver Visit Action Billing Support Center Logos Welcome - seniorcaredomo (Senior Care	đ.
New Search Results (4)				DCP-L5650	DN on MDC02	Microsoft Print to PDF Microsoft XPS Documen Send To OneNote 2016	MCO Communications	P Limited 6.0.1 TELXWEBI	A) 10 10
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 AM	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		○ Selection ○ Page: Enter either a sing page range. For	Current Page	Colate	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 Oct 1	7



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



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EVV

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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		Welcome - riversu	Support Center Logou pport (Riverwood Demo
New Caregiver	_		New Caregn Search Care	/er giver							
Demographics											
* First Name									Middle Name:		
* Last Name:	Calast								* Initials:		
* Caregiver Code	1007							Alt (aregiver Code:		
* Status	Select							Careo	uver Mohile ID:		
* SSN#:	(e.g. xxx-	xx-xxxxx)						Mo	obile Device ID:		(i)
Rehire :	Rehim	e Date:		H				* Emj	PCA LPN ST Ployment Type: PA APC ILST ESC Otho	HHA PT MSV C NT HCS SCN T PBI: C SDF er (Non Skilled) 0 Oth	A RN OT V HSK RT S CNA I SCI S RESP CBSA er (Skilled)
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	Carogiver Info				
Restrictions	Namer Brawn Mike	Canadivan Cada: 100E	DOB. VV/VV/VVVV	Discipling: DN LDN DT OT ST	
Compliance	Name: Drown Mike	Caregiver Code: 1005	DOB: ^// // //	Discipline: RN, LPN, PT, 01, ST	
Visits					
Calendar	Drofile				
	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	1		* 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 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 Name: Poe John MCO Name: PA Health & Wellness	Nurse: Admission ID: 12345678	Frequency: Member ID:	MCO Coordinator: Eliza Torelli DOB: XX/XX/XXXX
Authorization =	Valid Dates/S	Service	Info

Authorization									
Auth. #	From Date	<u>To Date</u>	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	S 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 Da	
Category	Task Number	Number Description As Need		<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	4	
Personal Care	109	Grooming-Shave	Yes	1-7		
Personal Care	110	Grooming-Nails	Yes	1-7	4	
Personal Care	111	Dressing	Yes	1-7		
Personal Care	112	Skin Care	Yes	1-7	4	
Personal Care	113	Foot Care	Yes	1-7		
Nutrition	205	Prepare Snack	Yes	1-7	4	
Activity	302	Patient walks with assistive devices	Yes	1-7	4	
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	1	
Patient Support Activities	501	Patient Laundry	Yes	1-7	4	
Patient Support Activities	502	Light Housekeeping	Yes	1-7	4	
Patient Support Activities	508	Accompany Patient to medical appointment	Yes	1-7	4	



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 #: <u>215-555-6677</u>
Assignment ID: 100007	Coordinator: Julie Ann Compton
Schedule Visit Info Bill Info	
chedule	A History
* Schedule Time: 1630 - 1830	Caregiver Code: 1007 ?
POC: 2292564-10/16/17	Assignment ID: 100007
* Service Code: T2025-SE1	
* H: 02 M: 00	
Bill Type: Hourly	•
	Save

- **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

IHA Exchange - Add/Edit Masterw



1. Hours (per day)

2. Caregiver

Save

- 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								
	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	* New Reason: Select Action Taken: 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:	Client doesn't have a phone in I V	* 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)

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												
I,	✓ Timesheet Required ✓ Timesheet Approved												
	POC Duties												
			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	200000 423-324 722AB	TEDU.	
Call Maintenance										
Caregiver First Name:	ist Name:	Caregive	er Code:		Assignment ID:					
Admission ID:		Patient Fir	rst Name:		Patient Last	t Name:		Coordinator: All	~	
Status:	Select	✓ Patie	ent Team: All	>] Patient Lo	ocation: All	~	Patient Branch: All	~	
From Date:	05/01/2016	[HHMM]	To Date: 06/30/2016	5	[ННММ]					
	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 Maintenan	ce		6	🔯 (1 all Maint	enance		2 Miss	(10) ed In		2 (Missed	0) Out		2 (1 Missed	55) Call	1	2 Visit Log	i.	Reis	2 ected (Calls										
Call Maintenaux	***		11	11	-			11	1	1									-	11	-		•	1	- 1	-1	1	1	1	
ل هن بلد ر بلد ر	a																													
Search Results	Total Calls	(2)																											egen	
Assign. ID#	Caregiver	Caregiver Na	me		Caregiv	er Phor	не		Pa	tient	Name		Call D	ate	Call Tin	ne	Call Ty	<u>De</u> <u>C</u>	ller I	D		Statu	1				^	ction		
100012	1012	Roberts Susan	0		Phone 3 Phone 2	: 212-3	342-94	85	Sn	nith Mi	ke (34)	53453) 06/30/	2016	14:05		IN H	20	1-895	-6191	l.	Out o	f Wind	low			B	eject		
100046	1046	Adu Shadae			Phone 1 Phone 2	: 718-4 :	134-20	44	Ce Sri (7)	na Joh vellett 89654)	n (124 e Sami)	578) , anth	05/17/	2016	08:02		IN H	21	8-874	19554		No Sc	hedule	e Open	ling		8	eiect		

Fixing Call Issues

- Linking Calls
- Rejecting Calls





Visit Management (Visit Quick Entry)



Manual

Visit Quick Entry (Visit -> Visit Quick Entry)

Visit Quick En	itry												
Select Memb	ber												
	* мсо: Ц	JPMC	Health Plan -	Training N	/	* Member	RUSH GARRY (3	137242, 01614	66180 🗙 🗩 Search	Clear			
Active Autho	orizations (-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 We	eekly Hours: 48.50	UPMC He	alth Plan - Training		S
Auth 1	08/01/20	15	08/01/2016	Home Health	LPN		T1003SE-SW1	Weekly We	eekly Hours: 54.50	UPMC He	alth Plan - Training		
Auth 2	08/01/20	16	08/01/2017	Home Health	RN		T1002SE-SW1	Weekly We	eekly Hours: 47.50	UPMC He	alth Plan - Training		
Visit Date 🕇			Service Code		Visit Start	Visit End	Duration		Caregiver		Authorization Nu	mber	
10/18/2018	8	Ê	T1002SE-SW	1 v	0800	1100	03:00		Brown Mike	× 🗩			B Delete
Visit Date		m	Select	~	Visit Start	Visit En	d	Duties (0)	Select Caregiver	,O			🔋 Delete
											Preview Author	ization	+ 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 Form This tool is used to validate and ensure structurel correctness as well as basic data formation account is activated only ofter successful validation is completed. Note: Upon validation data a discarded fruit shared in any PEAX server!	at Validation Portal a prior to importing your EDI file into the Production environment. Your SFTP
Identify Agency	Result
File Processed	Result
File Format Validation	~
File Naming Convention Validation	~
Text Qualifier Validation	~
Column Count and Position Validation	1
Mandatory Fields Validation	-
Max Field Length Validation	Marrielo 1
Numeric Field Validation	
Date Format Validation	
Situational Fields Validation	-
The Results indicate file errors under the speafied Validation. Clic	the <u>Nore info</u> hyperlink to access details and guidance.
🗙 - Validation Error. 🗶 - Validation Ski	oped. 🐭 - Validation Success.

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	
proved 🗹 Restricted Caregiver 🗹 Timesheet Not Approved 🗹 Authorization		
Searc	ch View Report	
	Admission ID: Caregiver Name: With Temp Caregiver I Caregiver Compliance I POC Complian proved Restricted Caregiver I Timesheet Not Approved Authorization	Admission ID: Member Team: All V Caregiver Name: From Date: With Temp Caregiver I Caregiver Compliance I POC Compliance proved I Restricted Caregiver I Timesheet Not Approved I Authorization Search View Report

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)

New	Invoice Batch											
		D	ate: 09/01/2016						Batch Number:	4016LION000	10	
		То	tal: 0 Amount:	\$0.00 <u>Refresh</u>								
illat	ble Visits											
	From Date:			To Date:			* Payer: Tig	er Care DEMO PA	′ER ▼		Search	
Sear	rch Results (19))										
	Date 6	Caregiver	Admission ID	Patient Name	Vis	it	Visit Hrs	Visit Rate	TT Hrs	TT Rate	Amou	nt
0	06/06/2013	Bush Alfred Reginald	LIO-1234567892	Jackson Jarrell Austin	120	0-1700	05:0	0 \$10	00		\$10.00	\$50.00
	04/03/2016	Lambe ML Maheth	LIO-ADM432	Jagan SJ Suresh	160	0-1800	02:0	0 510	00		\$0.00	\$20.0
	04/J5/2016	ush afre	LIO-1234507892	Jackson Jarreli Austin	080	0-1300	05:0	0 \$10	00		\$0.00	\$50.J
	04/05/2016	Reginald	LTO-ADM432	Jagan S1 Surech	160	0-1800	02:0	620	00		\$0.00	¢40.0

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

illing Roview Sea	rch									
ming Review Sea	ren	0								
View: O Summa	ary View 🕚	Detail View 🛈								
	rers Tick Cal D		A Coollinger				de la a			
* * * *	A 14 4 4									*****
earch Results (1	5)									
voice Number 5	Invoice Date	Admission ID	Patient Name	Contract	Coordinator	Visit Date	Service Code	Units	Amount on Hold	Hold Reasons
										Missing Patient Address
										Missing Patient City,
0094	05/11/2016	242424242424	Woodson, Charles	Tiger Care DEMO PAYER		02/08/2016	HHA H1	0.00	\$20.00	Missing Patient State,
										Manual Hold : Wrong V
0095	05/11/2016	NW153754	Woden, Neptunus	Tiger Care DEMO PAYER	Jim Schwartz	01/05/2016	HHA H1	0.00	\$20.00	Manual Hold : Wrong V
0099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	09/22/2015	HHA H1	0.00	\$10.00	Missing Patient State
	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$60.00	Missing Patient State
10099										Missing Patient Address
10099										
00099	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$40.00	Missing Patient City,
10099 10101	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$40.00	Missing Patient City, Missing Patient State,
00099 00101	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	<u>11/02/2015</u>	HHA H1	0.00	\$40.00	Missing Patient City, Missing Patient State, Missing Patient ZipCode
10099 10101	05/16/2016	0915432	Cappelli, Peter	Tiger Care DEMO PAYER	Jim Schwartz	<u>11/02/2015</u>	HHA H1	0.00	\$40.00	Missing Patient City, Missing Patient State, Missing Patient ZipCodi Missing Patient Address Missing Patient City.

- 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	ng							Li Li	imited 6.0.1.0 TELXWEE
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	n	Invoice Number:			Service Code:	All	•	Admission II	D:		
					Last Name	s	First Name:			Claim Status:	All	•				
					Visit From	K «M/d/yyyy»	Visit To: <m <="" th=""><th>Vүүүу≥</th><th>m</th><th></th><th></th><th></th><th></th><th></th><th></th><th>- 82</th></m>	Vүүүу≥	m							- 82
esubmit claim	s E-submission	Batch							Search							- 11
ayer: Demo M	۱L		• Batch N	umber: CLM00	0930000401424	Batch D	ate: 10/30/2	018							Add	l Claims
esubmit Claim	is Search															Leger
rch Results (5))	Delay Reas	on Code : Se	lect		• Visits	Older Than :	90							Pag	je 1 of 1
tch Number	Admission ID	Patient Name	<u>Visit Date</u>	Invoice No	Service Code	Caregiver Name	Schedule	<u>Visit</u>	<u>Visit</u> Hours	Billed Hours	<u>Billed</u> Units	<u>Bill</u> Type	<u>Billed</u> Amount	ST	TRN	
04DVN200213	DVN-	Brooks Steven	06/03/2014	395423	Daily1	Rosa Martinez	0200-0300	0200- 0300	01:00	01:00	1.00	Hourly	\$0.00	0		B 3
04DVN200215	DVN-	Brooks Steven	06/04/2014	395427	Rate1	Rosa Martinez	0800-0900	0800- 0900	01:00	01:00	1.00	Hourly	\$12.50	0		6
04DVN200210	DVN-	Brooks Steven	05/07/2014	395418	Rate1	Bav Raj	0900-1000	0900- 1000	01:00	01:00	1.00	Hourly	\$12.50	0		Ø)
04DVN200216	DVN-	Shah Nirma	12/07/2015	395428	Rate1	Shamim Patel	0100-0200	0100- 0200	01:00	01:00	1.00	Hourly	\$12.50	0	555555	B :
	DVN-	Shah Nirma	12/08/2015	395429	Rate1	Shamim Patel	0200-0300	0200-	01:00	01:00	1.00	Hourly	\$12.50	0		

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 Notes: No										
'	Member Gene	r General Notes: Yes Missed Visit Notes: No									
Visit CaregiverComments: 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

X Repo	HHAeXchange rt Date: 12/07/2	e 2017 10:30			<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		_		
~~~~	have and						

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

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

×	HHAeXchange         Batch Detail Report         Page 1 of 3							Page 1 of 32					
		5									Repor	rt Date: 12/7/	2017 10:58:47 AM
		Batch Numb	er: 14474RWDP0	0021				Batch D	ate: 11/06/201	.7			
		Export Da	ite:					Invoice Co	unt: 1				
		Total Amount: \$231.03Total Hours: 15:00											
		Total OT Hou	Irs:		Total TT Hours:								
		Total Visit Hou	Irs: 15:00		Provider: Riverwood Demo								
		Stat	us: 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

	hange			Unve	erified V	isit	s Aging	Detail			Report Date	Page 1 2/07/2017 1	L of 5
Provider Name	1			<3		3-7		8-14	15-	21	22-28	>28	
Riverwood Demo	)			0		3		21	2:	1	22	26	
From D	oate: 11/7/2017	,		To Date: 12/7/2017 Exclude Non Billable Visits: Yes					Yes				
Teams: All DS : Duty sheet required													
Total RowCour	it: 83												
Sr Provider # Name	Admission ID	Member Name	Status	Caregiver Name	Visit Date	Agin g Day	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	41614661801	RUSH GARRY	Active	Brown Mike	11/21/201	-16-	1200-1400		Default	~			

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

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

🔆 нн/	AeXchange			1	<u>lember Ge</u>	eneral Notes				Report	Date: 12/07	Page 1 of 8 /2017 10:42					
		From Date:	11/1/2017				To Date: 1	2/7/20	017								
		MCO:	Health Plan - T	Training			Member Name: A	II									
	Linked N	otes From:	Health Plan - T	Training		L	inked Notes To: A	II									
		Reason:	All				Calendar Notes: N	0									
	Member Gen	eral Notes:	Yes			Mis	sed Visit Notes: N	0									
Vis	sit Caregiver (	Comments:	No				Coordinator : A	II									
									Type of PG CN VCC MVN	f Notes Valu Member Go Calendar N Visit Careg Missed Vis	ies: eneral Notes lotes iver Comme it Notes	nts					
Status	Created Date	Created By	Adm ID	Member Name Caregiver Name	мсо	Note	Reason	Clos	sed 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	rive t (Riv Dem	rsuppor erwood าง)	12/05/2017	Riverwood Demo	PG					
Closed	11/17/2017 09:45	upmc (UPMC Health Plan	01614661401	SAGER AMY	UPMC Health Plan -	Yes. Correct is 373 Main St, Altoona	Authorization Edit	rive t	rsuppor	11/17/2017	Riverwood Demo	PG					



# **Reporting – List of Caregivers**

#### Path: Report → Caregiver → List of Applicant/Caregivers

**X HHA**eXchange List of Applicants/ Caregiver Page 1 of 1 Report Date: 12/07/2017 04:45 PM Status: All Provider: Riverwood Demo Type: All From Date: To Date: Discipline: All Team: All Group By: No Group Discipline Caregiver Caregiver Alt. Team Date of Phone Current Application Hire Date Language1 Language2 Current Code Caregiver Birth Status Type Date Code RN, LPN, PT Brown Mike 1005 XXXXX Active Employee OT, ST HHA Fried Gary 1001 XXXXX Active Employee Hamilton Kip 1010 PCA, HHA, XXXXX Active Employee Other (Non Skilled) PCA Loretta Johnson 1009 XXXXX Active Employee Richardson Rhan 1003 09/01/2017 English PCA, HHA, XXXXX 718-406-4633 Active Employee 08/01/2017 Creole PA 1000



# 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 TELXWEB
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 Osystem 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 Managemer	nt		1000 G.B.J.D 700.000
Search			
* Reference T	able: Member Team	Search	
Search Results			Add
Member Team ID	Member Team	Description	St <u>_cus</u>
<u>4152</u>	Default	Default	Active
<u>5215</u>	Toom 1	EW D1	Active
4151	HHAeXchange - Member Team Detail	s	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 Search										
Billing Rates										
Status: Active 🗸 Discipline: All 💙 Rate Type: All										
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>