

T Zone Pennsylvania Joint MCO Provider Information Session

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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





Service Coordination Services in Scope

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



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





- 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 V			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



PART 1

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

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

- 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 ** NOT USED BY SCEs (Not discussed in this video) **

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//http
 - 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	i notification email. Do NOT reply.
A new placement requ	lest has been sent to you with the following details.
Payer Name Admission ID	
Start of service Cut of time	
Frequency Special Requests	SAT:0-0, SUN:0-0, MON:0-0, TUE:0-0, WED:0-0, THU:0-0, FRI:0-0 :Request Gender: Male , Primary Language: English, Secondary Language: Spanish
Discharge Date	
HHA Exchange This message and any ac	companying attachments contain information from Homecare Software Solutions LLC which is confidential or privileged
The information is inten disclosure, copying, dist	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

sender immediately by reply e-mail and destroy all c opies of the original message.

New Placement Request (Home → Pending Placements)

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Link C		System Notify	ations									
Memb	er Team: All	System Noting	Coor Note	dinator: All	ator" filter is on	Iv applicable for Ev	Search ents and Notes s	ection.				
Pend	ling Placements											
Admi	ission ID St	tart Date S	top Date	Frequency	Servio	ce Cat. Se	vice Type	Request Sent At	Status		Cut Off Time	MCO Nam
<u>1918</u>	<u>27467</u> 09	9/01/2018			Home	Health HH	A	10/17/2018 12:47:39 PM	Pending	:	12/25/2018 23:26:39 PM	ACP CHC Trai
												Tra
Note	25										Pag	je 1 o
	rom	Created Date	Member Name	2	Reason		Note			MCO Name		Actio
K	EYSTONE FIRST	10/17/2018	N/A		Communicatio	n	Can you	please provide the IDs and DO	B of the 3 members	ACPA CHC Tr	aining	Reply

Member Management – Placement Review

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

	Member Info					
	Placement Type: Home Health	$\overline{}$				
	General					
	* Placement Acceptance	e Window: 99999 (Mins) 🕦				
	Mem	ber Name: XXXXX		Mer	nber ID: XXXXX	
	Adr	mission ID: 191827467			Address: XXXXX	
		Phone: XXXXX				
	* Service	Start Date: 9/1/2018		Z	ip Code: 19019	
	,	ACO Name: ACPA CHC Training		Alt. Men	nber ID:	
	Disch	arge Date:		Fre	equency:	
Authorization (i)		Gender: Female				
* Sei	rvice Category: Home Health 🔍	* Service Type: HHA	~			
* Authoriz	ation Number: P000908765	* Service Code: T2025	\checkmark	Service Code Type: Hourly (Mutu	al + Member Shift Overlap)	
	* From Date: 09/01/2018	* To Date: 02/28/2019		Authorization Type: Entire Period	$\overline{}$	
Diag	nosis Code #1:	Diagnosis Code #2:		Diagnosis Code #3:		
Hours						
Set Masterweek Now	: 🗌					
* Hours pe	er Auth. Period: 962 🕕 🚺	Additional Rules:				
* Member Team: S	elect 🗸 Koordi	nator: Select	Accept Requ	est More Time Accept And Print	Select V Deny	
Service Location Cod	ie: N/A 💙 🛈					





Member Management – Placement Acceptance

Accept Placement

* Member Team: Default 🔍	* Coordinator: Default	Accept Request More Time Accept A	nd Print Select 🔽 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

ember Team: Al	~	Search							
tal Pending: 1		Total Accepted: 0	То	tal Staffed: 0	Total Acc	epted with no Masterweek: 1			
ending									
									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 09/0	09/01/2018			Home Health	HHA 10/17/2018 12:47:39 PM Pending	12/25/2018	CHC		
							-	11:20:39 PM	Trainin
			-		-	1	-		
taffed with Tem	þ Caregiver								
				No Accer	sted Member Found				
				ito necep	ted Hember . same				-
itaffed									
				No Staff	ed Member Found				
Accepted with Ne	Masterweek								
									-
lame		Addmission ID	Start Date 6	Stop Date	Frequence	Z Time Accepted		Payer Name	
JUNTED ELICENE		7428428262	09/26/2018			09/25/2018 17:00:11	PM	UPMC Health Plan SE Demo	,



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 <u>Profile</u> <u>Authorization</u> Special Requests	Member Info - Active Name: Cle MCO Name: Pe
Master Week Calendar Visits POC	



Member Management – View Info

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

Brafile	Member Info - Active				
Authorization	Name: Schultz Gewendolin	Nurse:	Frequency:	Payer Coordinator:	
Authonization	Payer Name: ACPA CHC Training	Admission ID: 191827467	Member ID:	DOB: XX/XX/XXXX	
Insurance Special Requests					
Special Requests					
Master week	Profile				
Visito	Demographics				History
NOC	g				
Clinical	First Name: Gewendolin		Middle Name:		
Info	Last Name: Schultz		Member ID:		
1110	Gender: Female		DOB: XX/XX/X	XXX	
Search			Medicaid Number:		
First Names	Addross				History
	Address				matory
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
	Emergency contact information				motory
	Name:		Relationship:		
	Address:		Phone 1:		
	Phone 2:				
	Nama		B eletienshin.		
	Address		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	l I	Name: Schultz	Gewendolin			Nurse:	Frequen	cy: MCO Coo	rdinator:
Special Requests	мсог	Name: ACPA C	HC Training:			Admission ID: 19182	7467 Member	D:	DOB: XX/XX/XXXX
Calendar									
Visits									
POC	Authorizat	ion							
Search	Authorizat			1		1	1	1	
First Name:	<u>Auth. #</u>	From Date	<u>To Date</u>	Service Type	Service Code	Authorization Type	мсо	Service Category	Notes 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	0.0.3.1 TELXWEB08	
General Profile Authorization Special Reques Master Week Calendar Visits	Member Info - A	ctive Name: HUNTER EUGENE Payer Name: UPMC Health Plan Derr	o	Nurse: Admission ID: 7428428262	Frequency: Nember ID: 7428428262	Payer Coordinato DOE	: : XX/XX/XXXXX	History	
Note	<u>5</u> Date	From	<u>To</u>	Note		Reason	Status	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 I placement?	DOB 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 pa	tient's preference.	Communication	Open	Close Reply	Print



Member Notes – Create and Respond

- Create (New) See next slide for details
 - From Member → 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 $\rightarrow \underline{\text{Reply}}$
- 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

- **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:	Continue scheduling with usual Caregiver. Optional Urgent Message checkbox Attach a file
Upload 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 → Other Reports → Member General Notes)

K HHAeXchange					Member Ge	eneral Notes	Page 1 of 8						
									Report	Date: 12/07/	2017 10:42		
	1	From Date:	11/1/2017		To Date: 12/7/2017								
MCO: Health Plan - Training					Member Name: All								
Linked Notes From: Health Plan - Training			Linked Notes To: All										
Reason: All				Calendar Notes: No									
Member General Notes: Yes					Missed Visit Notes: No								
Visit Caregiver Comments:			No		Coordinator : All								
					Type of Notes Values:				les:				
					· F				Member General Notes				
					CN Calend				Calendar N	lotes			
					VCC					Visit Caregiver Comments			
				MVN Missed Visit Notes									
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 t	11/17/2017	Riverwood Demo	PG		



MCO Communications – Review/Create

Search/Review

• From Action \rightarrow MCO Communication

MCO: From Date:	All	•	Message Type: All To Date:	V Status: All V Reas	on: All		*			
New Search Results (4) Page 1 of										
		10/08/2018			a contraction	-				
Pennsylvania Top MCO - PA	U	11:46:47 AM	Communication	Please note that the updated billing process takes effect in the next cycle.	Open					
Pennsylvania Top MCO - PA Pennsylvania Top MCO - PA	•	11:46:47 AM 10/08/2018 11:45:06 AM	Communication	Please note that the updated billing process takes effect in the next cycle. Action required on pending Placements.	Open Open					
Pennsylvania Top MCO - PA Pennsylvania Top MCO - PA Pennsylvania Top MCO - PA	• • •	11:46:47 AM 10/08/2018 11:45:06 AM 10/16/2018 12:39:56 PM	Communication Communication Calendar Note	Please note that the updated billing process takes effect in the next cycle. Action required on pending Placements.	Open Open Open	<u>Close</u>	Reply			

- Create (New)
 - Reason (by MCO)

Fr	rom: Pennsylvania Top MCO - PA
* Rea	son: Communication
* N	ote: Continue scheduling with usual caregiver.
gent Mess	(Upto 500 Characters)
gent Mess Upload I	(Upto 500 Characters) age: File:
gent Messa Upload I	(Upto 500 Characters) age: File: Save Cancel

= Inbound Note

= Outbound Note

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= Attachment

 \bigcirc

MCO Communications – Print

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

KHHAeXchange Home Hember Caregiver Visit	Action Billing Report Admin	2 mt Preview X Image: Strain Control of the strain Cont
MCO Communications		+ + + +
MCO Communications		HHAeXchange - MCO Communications Page 1 of 1
MCO: All	Message Type: All	le Pint A
From Date:	To Date:	General Options
	Search	Select Parter 4 Home Member Caregiver Vial Action Billing
		To Adobe PDF TRUE of the PDF Report Admin Welcome - senior according from Control (Senior Cont
New Count Develop (4)		Communications Limited 6.0.0
New Search Results (4)	he c	Hasser Communications
MCO Created Date Reason	Note	KOO [A] Type: [A] (Status: [A] (Katos: [A])
Pennsylvania Top MCO - PA	Please note that the updated b	Status: Ready Print to file Preferences Date:
Pennsylvania Top MCO - PA 0 10/08/2018 Communication	Action required on pending Plac	Location: Find Printer
Pennsylvania Top MCO - PA	Schedule coordination for the n	Controls. The Barrol Restor (N) The Barrol Restor (N) The Status
December in Tax MCO - DA	Theshe for the suid- element	Page Page Preventional Top (PCO) Distance / Communication Presenter into the updated billing process takes effect Open Coope Reservement Distance / Coope Reserve
04:24:01 PM	Rack	Selection Ormest Page
*****		OParet Development
		Enter either a single page number or a single 11 2/2 3/3 Top pho- (*) 12.356 Calendar Nate Schedule coordination for the month is in progress. Open
	Encoding >	page range. 5-12 Performance State 200 (2018)
	Print	
	Print preview	Print Cancel Apply
	Refresh	
	Append to Existing PDF	
	Convert to Adobe PDF	
	Export to Microsoft Excel	https://app.hhaexchange.com/STD0600010011/Action/PayerCommunications.aspx?Versi., 11/28/2017
	Send to OneNote	
	Properties	Pgge 1 of 1 V 🖓 🛶 🧼 🕅



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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Adding Caregivers – Data Entry

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

🔆 HHAeXchange	Home	Member	Caregiver	Visit	Action	Billing	Report	Admin		Welcome - riversu	Support Center Logo pport (Riverwood Dem
New Caregiver			New Caregiv Search Care	/er giver							
Demographics											
* First Name * Last Name								Middle Name * Initial	s:		
* Gender	Select	~						* DOE	3:		
* Caregiver Code	1007							Alt. Caregiver Code	:		
* Status	Select	\sim						Caregiver Mobile II):		
* SSN#	(e.g. xxx-: Select	xx-xxxx)						Mobile Device II			()
Rehire	: 🗌 Rehir	e Date:		Ξ				* Employment Type	PCA LPN ST HMK PA APC ILST ESC Other	☐ HHA □ PT □ MSV □ NT □ HCS □ SCM □ PBIS □ SDP r (Non Skilled) □ Other	N RN OT W HSK RT S CNA S CNA S RESP CBSA er (Skilled)
Address Street 1 City Zip Phone 2		-						Street 2 State Home Phone Phone 3	2: 2: 2: 3:		
Emergency											
Name Address Phone 2	:	-						Relationship Phone 1): : ·	-	
Name Address Phone 2	:	-						Relationship Phone 1): :		
						Save	Cancel				



EVV

Manua

Caregiver – Profile Overview

- Demographics
- Employment
- Address
- Emergency

Caregiver Info								
Profile	Caregiver Info							
Restrictions	Name: Brown Mike	Caregiver Code: 1005	DOB: XX/XX/XXXX	OOB: XX/XX/XXXX Discipline: RN, LPN, PT, OT, ST				
Visits								
Calendar								
	Profile							
	Demographics				History			
	* First Name	Mike		Middle Name:				
	* Last Name	Brown		* Initials: BM				
	* Gender	MALE		* DOB: XX/XX/XXXX Time & Att. PIN: 100005				
	* Caregiver Code	1005						
	Alt. Caregiver Code			* Status: Active				
	* SSN#	XXX-XX-XXXX						
	Rehire	No Rehire Date:	* En	nployment Type: RN, LPN, PT, OT, ST				
	(i) Caregiver Mobile ID		 M 	i) Mobile Device ID:				
	Ethnicity			* Hiring Status: Employee				
	* Primary Patient Team	Default						
	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:				



EVV

Manua
Schedule Management (EVV)



Scheduling – EVV only



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EVV

Scheduling Visits – Requirements



• Member Status = Active

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

Authorizati	ion							
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	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	POC End Dat		
Category	Task Number	Description	<u>As</u> 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 #: <u>215-555-6677</u>
Assignment ID: 100007	Coordinator: Julie Ann Compton
Schedule Visit Info Bill Info	
chedule	A Histor
* 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	Close

- **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

EVV

- 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 Master Add/Edit Master Week ① * From Date: Copy Master Week Sa Hours: Caregiver: t-t Service Code:	erweek	Date: Mon
HHA Exchange - Add/Edit Masterweek Add/Edit Master Week * From Date: Copy Master Week Sat Hours: Caregiver: 2 Ass.ID: POC:SelectV H:0 M:0 Service Code:SelectV	HHA Exchange - Select Days Select Days Hours: 1200 1600 Caregiver: 1000 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.	Hou Car Ser Sele Sav

ours (per day)

aregiver

- rvice Code
- lected Days
- ve "Permanent Schedule"





Visit Management (Visit Quick Entry)



Manual

Visit Quick Entry (Visit -> Visit Quick Entry)

Visit Quick En	try												
Select Memb	er												
	* MCO: U	PMC	Health Plan -	Training 🔨	/	* Membe	RUSH GARRY (3	137242, 01614	66180 🗙 🗩 Search	Clear			
Active Autho	orizations (·	90 I	Days)										
Show All													
Auth. #	From Dat	<u>e</u> _	To Date	Service Category	Service Typ	e	Service Code	Authoriza	tion Type	MCO		Notes	
Auth 3	08/01/201	17	08/01/2018	Home Health	PCA		W1793	Weekly We	eekly Hours: 48.50	UPMC F	lealth Plan - Training		
Auth 1	08/01/201	15	08/01/2016	Home Health	LPN		T1003SE-SW1	Weekly We	eekly Hours: 54.50	UPMC H	lealth Plan - Training		
Auth 2	08/01/201	16	08/01/2017	Home Health	RN		T1002SE-SW1	Weekly We	eekly Hours: 47.50	UPMC H	Health Plan - Training		
Visit Date			Service Code		Vicit Start	Vicit En	d Duration		Caregiver		Authorization N	umbar	
			Service code		VISIC Start	VISIC LIN	Duration		caregiver		Autionzation N	univer	
10/18/2018	8	Ê	T1002SE-SW	1 🗸	0800	1100	03:00		Brown Mike	×	Ð		B Delete
Visit Date		雦	Select	~	Visit Start	Visit En	d	Duties (0)	Select Caregiver	,	Ð		B Delete
											Preview Autho	orization	+ 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	
HHAeYchange File Form	at Validation Portal
This tool is used to validate and ensure structural correctness as well as basic data formatin account is activated only after successful validation is completed. Note Open validation data is discarded put stirred in any PRAX servery.	g prior to importing your EDI file into the Production environment. Your SF
) Result
File Processed	Result
File Format Validation	4
File Naming Convention Validation	-
Text Qualifier Validation	4
Column Count and Position Validation	2
Mondatory Fields Validation	~
Max Field Length Validation	
Numeric Field Validation	Chare anto
Date Format Validation	
Situational Fields Validation	~
The Results indicate file errors under the specified Validation. Clic	k the Nore Info hyperlink to access details and auidance.
V - Validation Error 1 V - Validation Ski	and Lat Validation Success
A VORDODOTICNOL 1 A VORDODOTISM	Marte 1 - a A management subsystem.
	Finish

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



EVV

lanua

Prebilling

EV\

Prebilling Process

- Billing \rightarrow Prebilling Review
- Exceptions (Problems)

Prebilling Review			
Prebilling Review Search			
Member Name:	Admission ID:	Member Team: All	Coordinator: All
Caregiver Code:	Caregiver Name:	From Date:	To Date:
MCO: All			
Problem : Unbalanced Visits 🗹 Missed Visits	; 🗹 With Temp Caregiver 🗹 Caregiver Compliance 🛛 POC Compli;	ance	
🗹 Overlapping Shifts 🗹 OT/TT Not Ar	pproved 🗹 Restricted Caregiver 🗹 Timesheet Not Approved 🗹 Authorizatio	n	
	Sea	rch 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



EVV

Nanua

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)

EV\

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				Bat	ch Number: 40	16LION0001	10	
		To	tal: 0 Amount:	\$0.00 <u>Refresh</u>							
illat	ble Visits										
	From Date:			To Date:		* Payer: Tig	er Care DEMO PAYER	•		Search	
Sear	rch Results (19)									
	Date 6	Caregiver	Admission ID	Patient Name	Visit	Visit Hrs	Visit Rate T	T Hrs	TT Rate	Amour	it
0	06/06/2013	Bush Alfred Reginald	LIO-1234567892	Jackson Jarrell Austin	1200-1700	05:0	\$10.00			\$10.00	\$50.00
	04/03/2016	Lambe ML Maheih	LIO-ADM432	Jagan SJ Suresh	1600-1800	02:0	\$10.00		11	\$0.00	\$20.00
0	04/J5/2016	Jush Jifre Reginald	<u>LIO-12345₀789∠</u>	Jackson Jarreli Ausbo	0860-1350	05:0	0 \$10.00			\$0.00	\$50.JC
m	04/05/2016	Looney Goerge	110-ADM432	Jagan SJ Suresh	1600-1800	02:0	\$20.00			\$0.00	\$40.00

Save Selected Visits (

Click

Save Save & Next Select All & Save

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



EV\

Billing – Perform Billing Review

Billing → Billing Review

• Search for Invoiced Visits

lling Review										
illing Review Sear	rch									
View: O Summa	ry View 🖲	Detail View 🛈								
	er Tion Can D		Coo Sina P		111	S vice a			B H B has	+ / / / /
earch Results (15)									
nvoice Number 5	Invoice Date	Admission ID	Patient Name	Contract	Coordinator	Visit Date	Service Code	Units	Amount on Hold	Hold Reasons
20094	05/11/2016	24242424242424	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 V
00095	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 V
00099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	09/22/2015	HHA H1	0.00	\$10.00	Missing Patient State
20099	05/16/2016	1234567898	Avila, Alexander	Tiger Care DEMO PAYER	Jim Schwartz	11/02/2015	HHA H1	0.00	\$60.00	Missing Patient State
20101	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
00101	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,

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



EV\

Billing – Reviewing Billing Files

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

File Processin	g							Li	mited 6.0.1.0 TELXWEE
Claim Files	Remittances								
Download File	15								
	File Type:	837 Claim File	P	ICO: All		~	Processed From:	Processed To:	-
Invoic	e Batch Number:		File Na	ime:					
					s	earch			
Search Result	s (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.bxt	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



EVV

Manua

Billing – Rebill Process

- EVV Manual
- Billing → Electronic Billing → Batch Search and Resubmit Claims
- Add claims for resubmission

					HHAeXchange - Clain	n Search										×
					Search											
					Batch Number	n	Invoice Number:			Service Code:	All	•	Admission I	0:		
					Last Name	e []	First Name:			Claim Status:	All	•				18
					Visit From	K <™/d/yyyy> 🗰	Visit To: < M/	∜үүүү≥								- 12
Resubmit claim	s E-submission	Batch							Search							
Payer: Demo M	1L		• Batch N	umber: CLM00	0930000401424	Batch D	Date: 10/30/2	018							Add	d Clain
esubmit Claim	is Search															Leg
rch Results (5)		Delay Reas	on Code : Se	lect		v Visits	s Older Than :	90							Pag	je 1 of
tch Number	Admission ID	Patient Name	Visit Date	Invoice No	Service Code	Caregiver Name	<u>Schedule</u>	<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		ø
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		ľ
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		ľ
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	ľ
	DVA	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 (1) Cancel







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 \mathbb{N}		Find Next 🛛 🛃 🔹 🊱	1						
💥 нн	AeXchange			Membe	r Genera	al Notes			Pag	e 1 of 1	
	_							Report Da	te: 11/30/201	7 15:10	
	From Date: 11/1/2017					To Date: 11/30/2017					
	MCO: All					Member Nam	ie: All				
	Linked No	tes From: All			2	Linked Notes 1	io: All				
		Reason: All			-	Calendar Note	es: No				
1	Member Gene	ral Notes: Yes				Missed Visit Note	es: No				
Vi	sit 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

Report Date: 12/07/2017	10:30	<u>Lis</u>	<u>t of Members Ent</u>		
Admission ID:	Member	ID:	Status: Active	Coordinator: All	Priority Code: All
Last Name:	First Nar	ne: P	hone Number:	Primary MCO: All	Discipline : All
Branch: All	Sort	By: LastName	Nurse: All	Team: All	
Location: All		No Display Dupli	cate Member: No		
Admission ID Firs	st Name Last Name				
1 22699578804 Mari	itza Ramos				
2 31124778521 Ame	elia Bernt				
3 15678892101 Bob	Flowers				
4 12442115906 Emn	na Green				
5 36358874722 Matt	thew DeRossi				
6 11285866902 Ginn	ny Gordon				
7 58579642107 Liam	n Keller				
8 65225115426 Wya	att Clerge				
9 11285866703 Crai	ig Fitzgerald				
10 12345678 John	Poe				

Reporting – Batch Detail Report

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

Page 1 of 3			Batch Detail Report							HHAeXchange					
2017 10:58:47	t Date: 12/7/2	Report									5				
			Batch Date: 11/06/2017					0021	ber: 14474RWDP0	Batch Num					
				int: 1	Invoice Cou				Export Date:						
				irs: 15:00	Total Hou				Total Amount: \$231.03						
				irs:	Total TT Hou				Total OT Hours:						
			Demo	ler: Riverwood	Provid					urs: 15:00	Total Visit Ho				
										tus: Pending	Sta				
Billed Amount	Total units	TT Hours	OT Hours	Billed Hours	Employee ID	Caregiver Code	Caregiver Name	Service Code	Visit Date	Admission ID	Member Name	Invoice Number	Sr. No.		
Billed Amount \$64.56	Total units 3.00	TT Hours	OT Hours	Billed Hours 03:00	Employee ID	Caregiver Code 1004	Caregiver Name Thomas Carl	Service Code T2025- SW1	Visit Date 10/13/2017	Admission ID 01614661101	Member Name JOHNSTON JEREMY	Invoice Number 600031	Sr. No.		
Billed Amount \$64.56 \$30.51	Total units 3.00 3.00	TT Hours	OT Hours	Billed Hours 03:00 03:00	Employee ID	Caregiver Code 1004 1004	Caregiver Name Thomas Carl Thomas Carl	Service Code T2025- SW1 S5150	Visit Date 10/13/2017 10/14/2017	Admission ID 01614661101 01614661101	Member Name JOHNSTON JEREMY JOHNSTON JEREMY	Invoice Number 600031 600031	Sr. No. 1		
Billed Amount \$64.56 \$30.51 \$30.48	Total units 3.00 3.00 3.00	TT Hours	OT Hours	Billed Hours 03:00 03:00 03:00	Employee ID	Caregiver Code 1004 1004 1004	Caregiver Name Thomas Carl Thomas Carl Thomas Carl	Service Code T2025- SW1 S5150 T1005	Visit Date 10/13/2017 10/14/2017 10/15/2017	Admission ID 01614661101 01614661101 01614661101 01614661101	Member Name JOHNSTON JEREMY JOHNSTON JEREMY JOHNSTON JEREMY	Invoice Number 600031 600031 600031	Sr. No. 1 2 3		
Billed Amount \$64.56 \$30.51 \$30.48 \$64.56	Total units 3.00 3.00 3.00 3.00 3.00	TT Hours	OT Hours	Billed Hours 03:00 03:00 03:00 03:00	Employee ID	Caregiver Code 1004 1004 1004 1004 1004	Caregiver Name Thomas Carl Thomas Carl Thomas Carl Thomas Carl	Service Code T2025- SW1 S5150 T1005 T2025- SW1	Visit Date 10/13/2017 10/14/2017 10/15/2017 10/16/2017	Admission ID 01614661101 01614661101 01614661101 01614661101 01614661101	Member Name JOHNSTON JEREMY JOHNSTON JEREMY JOHNSTON JEREMY JOHNSTON JEREMY JOHNSTON JEREMY	Invoice Number 600031 600031 600031 600031	Sr. No. 1 2 3 4		
Billed Amount \$64.56 \$30.51 \$30.48 \$64.56 \$40.92	Total units 3.00 3.00 3.00 3.00 3.00 3.00	TT Hours	OT Hours	Billed Hours 03:00 03:00 03:00 03:00 03:00 03:00	Employee ID	Caregiver Code 1004 1004 1004 1004 1004 1004 1004	Caregiver Name Thomas Carl Thomas Carl Thomas Carl Thomas Carl Thomas Carl	Service Code T2025- SW1 S5150 T1005 T2025- SW1 W1792- SW1	Visit Date 10/13/2017 10/14/2017 10/15/2017 10/16/2017 10/17/2017	Admission ID 01614661101 01614661101 01614661101 01614661101 01614661101 01614661101	Member Name JOHNSTON JEREMY JOHNSTON JEREMY	Invoice Number 600031 600031 600031 600031 600031	sr. No. 1 2 3 4 5		



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Reporting – Unverified Visits Aging Detail

Path: Report → Compliance → Unverified Visits Aging Detail

K HHAeXa	Pag With HAeXchange Unverified Visits Aging Detail Pag Report Date: 12/07/201 Report Date: 12/07/201 12/07/201											Page 1 of 5 7/2017 11:04	
Provider Name	•			<3 3-7			8-14	15-21		22-28		>28	
Riverwood Demo	d Demo 0					3		21	21		22		26
From [From Date: 11/7/2017 To Date: 12/7/2017 Exclude Non Billable Visits: Yes							: Yes					
Tea	ams: All										DS : Duty s	heet requ	uired
Total RowCour	nt: 83												
Sr Provider # Name	Admission ID	Member Name	Status	Caregiver Name	Visit Date	Agin g Day	Schedule	Discharge Date	Team	Notes		1	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	01614661801	RUSH GARRY	Active	Brown Mike	11/21/201	-16-	1200-1400	have	Default				

Reporting – Member General Notes

Path: Report → Other Reports → Member General Notes

🔆 нн	eXchange			M	<u>Member General Notes</u>				Page 1 of 8 Report Date: 12/07/2017 10:42		
	1	From Date:	11/1/2017		To Date: 12/7/2017						
		MCO :	Health Plan - T	raining			Member Name: A	П			ľ
	Linked N	otes From:	Health Plan - T	raining		L	inked Notes To: A	П			
	Reason: All						Calendar Notes: N	0			
	Member Gen	eral Notes:	Yes			Mis	sed Visit Notes: N	0			ľ
Vis	it Caregiver (Comments:	No				Coordinator : A	П			ľ
								Type PG	of Notes Val Member G	ues: General Notes	;
					c V				Calendar	Notes	
									Visit Care	giver Comme	nts
								MVN	Missed Vis	sit Notes	
Status	Created Date	Created By	Adm ID	Member Name Caregiver Name	мсо	Note	Reason	Closed B	y 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	riversupp t (Riverwo Demo)	or 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	riversupp t	or 11/17/2017	Riverwood Demo	PG



Reporting – List of Caregivers

Path: Report → Caregiver → List of Applicant/Caregivers

🔆 HHAeXcl	K HHAeXchange					List of Applicants/ Caregiver					Page 1 o			
	5						_			Re	port Date: 12	2/07/2017 04:4		
Provider: Riverwood Demo						Type: All			Status: All					
From Date:						To Date:								
Discipline:	All				Team: All				Group By: No Group					
Caregiver	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	Active	Employee	08/01/2017	09/01/2017	English	Creole		
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	1002	The season	how	~~~~	Lann		~~~~~	have been and	A1/0-000		h			



# 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 TELXWEBO
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 (1)			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 :	
Course	Connel		
Save	Cancer		



### **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
5	


### **Administration – Reference Tables**

#### Admin → Reference Table Management

Reference Table Managemen	t		1000 0.1.0.0 (0.000)
Search			
* Reference T	able: Member Team	Search	
Search Results			Add
Member Team ID	Member Team	Description	St.cus
<u>4152</u>	Default	Default	Active
<u>5215</u>	Team 1	EW D1	Active
4151	HHAeXchange - Member Team Details	×	Active
	* Member Team:		
	Description:	$\sim$	
	Status: Active 🗸		
	Save		



### **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	2/7/2017 To Date: 12/7/2017									
Search Search										
Service Code	Category	Service Type	From Date	<u>To Date</u>	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
  - <u>Hhaexchange.com/info-session-feedback</u>







# HHAeXchange Provider Resources

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

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