

# PRODUCT PULSE

## *Top Updates from 2024 that Boost Efficiency & Growth*

December 2024

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# Housekeeping

- This webinar is being recorded, we will share the recording and slides after the session
- Your camera and mics are turned off
- Q&A at the end, please submit your questions in the Q&A box
- Post session survey— we would love your feedback!





# Agenda

- Introduction
- What's New: Recent Product Release Highlights
- Top Updates from 2024 that Boost Efficiency & Growth
- Partner of the Month: CareConnect
- Q&A

# Welcome! Meet the Speakers



**Alex Mastrianni**

Sr. Product Marketing Manager,  
HHAeXchange



**Courtney Hartman**

Director of Client Success,  
HHAeXchange



**Andrew Packer**

Chief Growth Officer,  
CareConnect



# What's New

*Recent Product Updates*

# Recently Released & Coming Soon!



## December Coming Soon!

- EVV Reporting Enhancements
- Surface Additional Rejection Reasons for Faster Billing

See what's new at:  
[knowledge.hhaexchange.com](https://knowledge.hhaexchange.com)

EVV Compliance Reporting Changes	
Old Name	New Name
Exception Summary by Agency	EVV Compliance Summary Report
Exception Detail	EVV Compliance Detail Report
Exception by Caregiver	EVV Compliance by Caregiver Report
Exception by Reason	EVV Compliance Exception Reason Usage Report
Exception Statistics Report	EVV Compliance Daily Summary Report

**HHAeXchange - Visit History (Visit:950145702;Batch:CLMASAS08910000400037)**

Date	Status	Additional Info
09/24/2024 03:07:06 AM	Rejected (2776)	A3-Acknowledgement/Returned as unprocessable claim-The claim/encounter has been rejected and has not been entered into the adjudication system 23-Returned to Entry. Usage: This code requires use of an Entry Code.
08/28/2024 03:43:12 AM	Submitted (837)	Transfer to SFTF

**Visit Response File History**

Date	Status	Additional Info
0 No Records.		

**Invoiced Visits (1)**

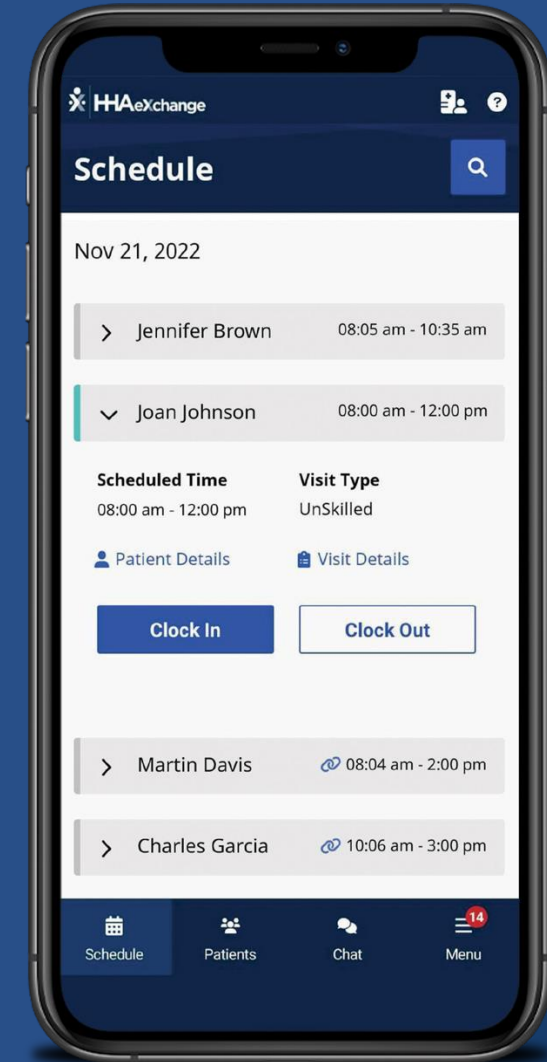
Consumer	Office	Alia	Visit / Message
OK Payer	Agent Vendor ENT	Caregiver Training Skilled	12:00 AM-1:00 AM



## Caregivers: Update Your Apps! 🚨

Please remind caregivers to keep their HHAeXchange Mobile App up-to-date. This will ensure they're able to take advantage of the latest and greatest version of the app, enabling them to:

- Quickly clock-in and clock-out
- Stay connected with your agency
- Provide better patient care



*"Between 75-80% of our caregivers prefer using the mobile app. It's the easiest tool for EVV."*

**- Dave Strohli, Administrator at Emerest Health**





# Product Spotlight

## *2024 Product Improvements*



# Secondary Billing for UPR Contracts



Supplement primary insurance with a secondary billing option before billing Medicaid

[Home](#)[Patient](#)[Aide](#)[Visit](#)[Action](#)[Billing](#)[Report](#)[Dashboards](#)[Admin](#)

Notification561

Messages9

To Do's8

Open Cases0

Chat4

Welcome - Support Training (SupportM  
(Support Training MO/ML - APP) (ID# 65  
AP

Patient Contracts

[General](#)[Contracts/Insurance](#)[Spend Down](#)[Referral Patient Info](#)[Profile](#)[Eligibility Check](#)[Authorizations/Orders](#)[Special Requests](#)[Master Week](#)[Calendar](#)[Visits](#)[POC](#)[Aide HX](#)[Others](#)[Rates](#)[Supplies](#)[Financial](#)[Vacation](#)[Family Portal](#)[Document Management](#)

Clinical

[Info](#)[Certification](#)[Med Profile](#)[MD Orders](#)[Interim Order](#)[Documentation](#)

Patient Info - Active

Name: 1 1

Admission ID: SUM-1384793284093666

Patient ID:

Contract: 1Test Contract, Demo Rellycare 1(India  
Test Only) (SUM), DFTA

DOB: XX/XX/XXXX

Primary Alt. Patient ID: 1\_Nov

Home Phone:

Address: XXX, XXX, SCHENECTADY, NY, 12344

Service Coordinators: 11162021 ser co

Office: Philadelphia

Languages:

Contracts/Insurance

Contracts

Other Insurance

Add Other Insurance

Insurance information is linked to visits for Internal Patients only.

Insurance eligibility status is not available. Confirmation with the Payer may be needed.

Payer Responsibility Sequence #	Relationship to Insured	Policy or Group Number	Insurance Name	Insurance Type	Claim Filing Code	Payer Org. ID	Payer Org. Name	History	Actions
Primary	Spouse	11111	Insurance 1	Blue Cross/Blue Shield	Exclusive Provider Organization (EPO)	1111	Payer 1	H	...
Secondary	Spouse	2222	Secondary	Medicare Part B	Other Federal Programs	222	Second	H	...



# Adjust All Claims

*Facilitate a faster billing process when adjusting claims in bulk.*

Adjust All Claims

×

All fields marked with an asterisk (\*) are required.

Submission Type \*

Void

TRN Number \*

☒ Place updated visit on hold

Manual Hold Reason \*

Select ...

Cancel

Save

DOB: 04/17/1948



# Expenses Added to Blended Overtime

*Apply expenses to Blended Overtime in the Payroll Module*

Reference Table Management Enterprise 24.05.01 TELXSWEB01 (Chrome/124.0.0.0) chrome 1 (Doc Chrome 124) 5/13 10:17

Search

Reference Table: Expense Type Search Legend

Search Results (11) Add

Expense Type Name ▲	Billing	Bill Rate	Bill Export Code	Payroll	Pay Rate	Payroll Export Code	Include In Overtime	Status
Bonus	No	N/A	N/A	Yes	\$100.00	BON	No	Active
Bonus 2	No	N/A	N/A	Yes	\$1.00	BON	No	Active
Cab	Yes	\$20.00	T9999	Yes	\$20.00	TRP	No	Active
Caribou	No	N/A	N/A	Yes	\$10.00	Caribou	No	Active
ddd	No	N/A	N/A	No	N/A	N/A	No	Active
Enhancement Adjustment	No	N/A	N/A	Yes	\$1.00	EN	No	Active
Medical Kit	Yes	N/A	N/A	No	N/A	N/A	No	Active
Mile	Yes	N/A	N/A	No	N/A	N/A	No	Active
Mileage	No	N/A	N/A	No	N/A	N/A	No	Active
SN Expense	Yes	N/A	N/A	No	N/A	N/A	No	Active
Supplies	No	N/A	N/A	No	N/A	N/A	No	Active

### HHA Exchange - Add Expense Type

Expense Type

\* Expense Type Name:

Billing: ☐

Bill Rate:

Billing Export Code:

Payroll: ☐

Pay Rate:

Payroll Export Code:

Status: Active

Include In Overtime: ☐ i

Save Cancel



# Caregiver Option Added to Invoice Grouping

*Users now have the option to split invoices by caregiver when selecting the choice to organize invoices by Per Patient, Per Day, Per Service Code.*

**Organize Invoices By**

☐ One Invoice Per Patient, Period: None Caregiver All ⓘ

☐ One Invoice Per Patient, Per Authorization ⓘ

☒ One Invoice Per Patient, Per Day, Per Service Code, Caregiver One Invoice Per Caregiver ⓘ



# Billing Units Restricted on Payer-Managed Rates

*Billing units on Service Codes will be locked – limiting the fields users can edit – to reduce billing errors that are causing rejections.*

**Contract Rate** [History](#)

* Discipline:	HHA	▼
* Service Code:	HHA - Hourly	▼
* From Date:	04/30/2019	📅
* To Date:	05/31/2025	📅
* Rate:	20.000000	\$
* Billing Units Per Hour:	1.00	
Hourly Cap For Invoicing:	<input type="checkbox"/>	
Hours:		Minutes: <input type="text"/>
Min Visit Hours For Daily:	0000	(HHMM)
Active:	<input checked="" type="checkbox"/>	

**Save** **Cancel**



# Reply Option Disabled in Messages

*Prevents Providers from replying to automatically generated system messages, where messages won't be monitored or address*

The screenshot shows a software interface with a modal window titled "Arsalan Notes" and a background list of messages.

**Arsalan Notes Modal:**

- From:** Support Training MO/ML (Reskin) ( )
- Created:** 02:50 AM
- To:** Demo ML ( )
- Reason:** ( )
- Service Coordinator:** ( )
- Priority:** Normal
- Message:** 1

At the bottom right of the modal, there are three icons: a reply icon (highlighted with a green box), a refresh icon, and a print icon.

**Background Message List:**

Status
Open (Reply icon highlighted with a green box)
Open
Closed
Closed
Closed

Page 1 of 3 | N

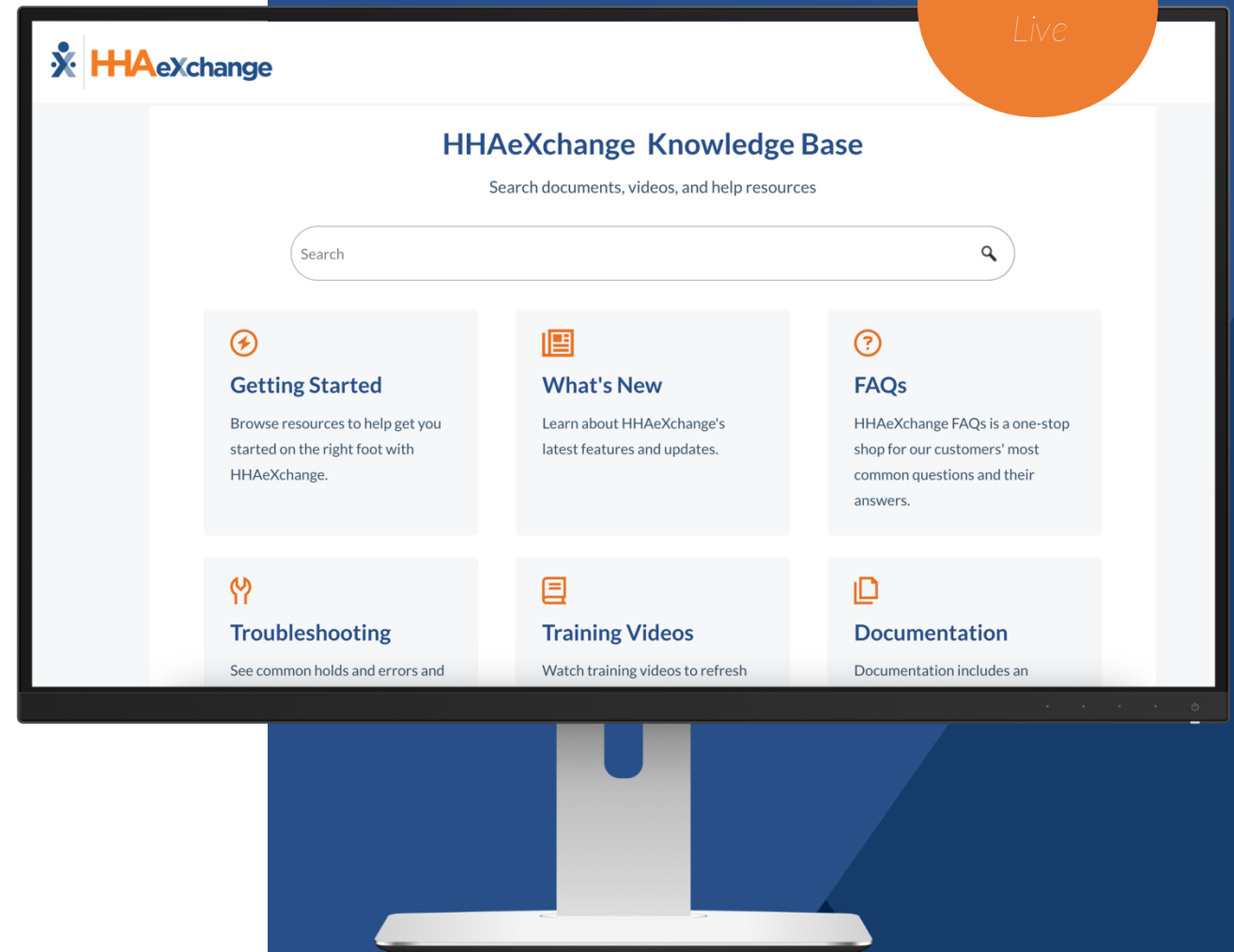
- Authorization created
- Authorization updated
- Authorization deleted
- Discharge Date created
- Discharge Date updated
- Discharge Date deleted
- Member Demographic update
- New Placement created with Authorization



# The new & improved HHAeXchange Knowledge Base

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## > 2024 Partner Connect Highlights



Simplifies clinical assessments with a user-friendly platform



Labor Compliance? Check.

An advanced payroll and tax solution designed by labor attorneys.



A cloud-based telecommunications software specifically designed for the homecare industry.



2025 Benchmarking survey participation details will be released January 2025.





# Partner Highlight

*CareConnect*

# Who is CareConnect?



CARECONNECT

## Launch

- Company was founded in 2017
- Leadership leveraged industry experience from other EMR/AMR solutions
- Vision to create a Caregiver Engagement Platform for Agencies

## Overview

**CareConnect is an AI-powered workforce optimization platform** that delivers a fresh, connected experience for home care agencies and **drives value from recruiting to engagement and retention** - *all in one place.*

## Foundation

- Established market penetration in Northeast
- Built out a network of 750K+ caregivers through direct sales and partnerships like HHAEExchange
- Developed a mobile-first workforce optimization platform based on our extensive, data-driven understanding of caregivers

## Scale

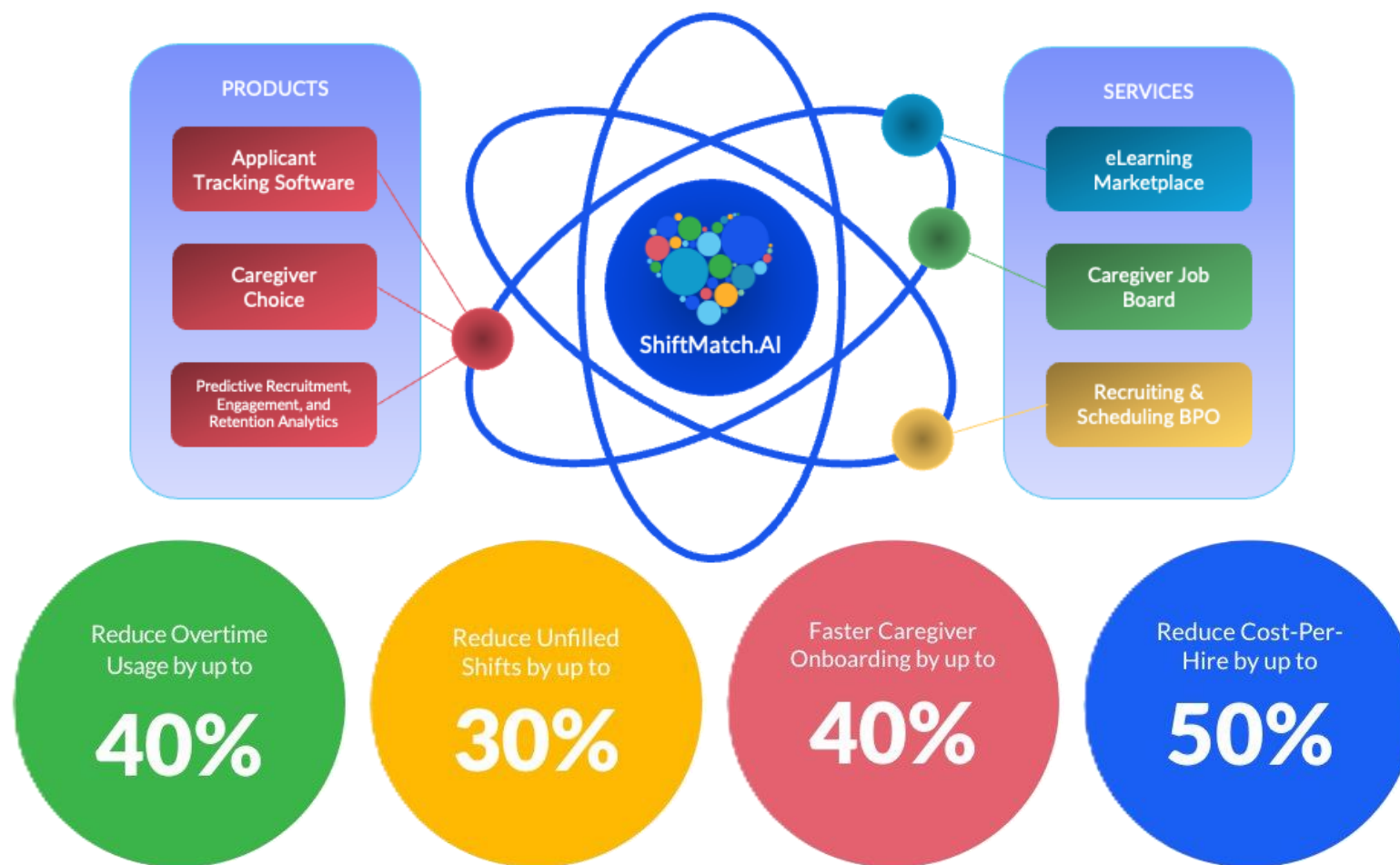
- Matt McGinty – Joined as CEO late 2023
- Andrew Packer – Joined as CGO early 2024
- In the last 12 months...
  - Deployment of ShiftMatch.AI and Machine Learning
  - Caregiver Choice
  - ATS 2.0

# Value Chain: CareConnect's Data-Driven Model



- **ShiftMatch.AI** and **Caregivers** are at the center of value delivery
- Caregiver Lifecycle feeds our **Data Intelligence**
- We're keen on identifying the right product and/or service **to address what's most valuable** to our clients
- Three key stages: **Recruit, Engage, and Retain**
  - Value Recognition
  - How we Solve for that Value
  - Supporting Products/Services

# Bringing Value to the Home Care Ecosystem





# Q&A



# Thanks for joining us!