

PRODUCT PULSE

January 2024

The content contained herein (“Confidential Information”) are the confidential property of HHAExchange and may not be copied or distributed outside the HHAExchange organization without the express written consent of HHAExchange. Distribution of this document or disclosure of any Confidential Information set forth herein to any party other than the intended recipient(s) of this presentation is expressly prohibited.



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: Highlights from the January Release
- Top HHAeXchange Reports
- Q&A

Welcome! Meet the Speakers



Alex Mastrianni

Senior Product Marketing
Manager, HHAeXchange



Zach Bouton

Client Success Manager,
HHAeXchange



What's New

January Product Release



January Product Release



- **Secondary Billing for UPR Contracts**
- **Caregiver Text Message Limits**
- **Prebilling Expand Authorization Issues Descriptions**
- **Added Claims Statuses**
- **Allocate Visit Authorization Based on Billable Service**
- **Reporting**
 - Discipline Column Added to the Wage Parity Report
 - Representative Column Added to the Collection Report
 - Several Columns Added to the List of Caregivers Report
 - Enhancements to the Comparison of Hours Report
 - No Value Options Added to Multiple Reports
 - Renamed Reports

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](#)

[Notification](#) ⁵⁶¹
[Messages](#) ⁹
[ToDo's](#) ⁸
[Open Cases](#) ⁰
[Chat](#) ⁴

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

Enterprise 24.01.01 AWSPRODWEB11 : 443 chrome 120 (Doc Chrome 120) 1/18 09:23 E

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](#)

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	...



Text Messaging Updates



Create more impactful messages and limit overage charges with Text/Mobile App Message Length guidelines. New checkpoints have been added to help you avoid sending duplicate messages.

Vendor Export Hyperlink:	<input checked="" type="checkbox"/>	i			
MD Order ICD Code Requirement:	ICD-10 Effective Date	i	10/01/2015		*
Validate ICD Code Selections:	<input checked="" type="checkbox"/>	i			
Validate Truncated ICD Code Selection:	<input type="checkbox"/>	i			
Orders Faxed this Month:	0	i			
Care Insights Dashboard Default Care Coordinator/Nurse/Assignee:	<input type="checkbox"/>	i			
Copy Note To All Open Care Insights Alerts By Default:	<input type="checkbox"/>	i			
Medication Interaction Severity Types:	Minor and Higher	i			
Turn off Orders and Goals Integration:	<input type="checkbox"/>	i			
Text/Mobile App Message Length:	160 characters (1 segment)	i			



Product Spotlight

Top HHAeXchange Reports



- Reports**
- Definitions**
- Visit Reports
- Definitions
- Time and Attendance Reports
- Definitions
- Exception Reports
- Definitions
- Events Reports
- Definitions
- Billing Reports**
- Definitions
- AR Reports
- Definitions
- Payroll Reports
- Definitions

Billing Reports Definitions

Billing Reports Definitions		
Report Name	Path	Definition
Prebilling by Patient (Detail)	Report > Prebilling > Billing	A detailed view, grouped by Patient, of all billable visits prior to invoicing.
Prebilling by Patient (Summary)	Report > Billing > Prebilling	A summary view, grouped by Patient, of all billable visits prior to invoicing.
Billed Not Exported Visits	Report > Billing > Medicaid	All invoices that have not been exported due to Billing Review Hold. Used to track billed visits that did not meet the e-billing requirements of the contracting vendor. This report may be filtered to display services within a visit date range or invoice date range, and/or visits within a single batch. Additionally, the results may be grouped by contract or run for a single Contract, Visit Status, "Reason Not Exported", and/or Coordinator.
Transaction Detail	Report > Billing > Medicaid	
Billing by Patient (Detail)	Report > Billing > Invoicing	Displays an alphabetical list of Patients that had billed visits for the week from the specified date, showing the visit details for each shift, including the number of hours billed per day.
Billing Report	Report > Billing > Invoicing	This report lists, by contract, billing/visit details for all visits billed within either the selected visit date and/or batch date ranges. Totals for each contract are shown. This report may be run for a single Contract, Caregiver, Patient, or billing batch. In addition, the report may be grouped and summarized by Team, Patient or Caregiver.
Open Invoice Summary	Report > Other Reports > Billing	Lists all open invoices within the specified time frame, grouped by contract. This report may be run based on visit or invoice dates and may be run for a single Contract or Patient.
Open Invoice Detail (New)	Report > Other Reports > Billing	This report lists, for a single contract, invoice information for all visits that have not been invoiced but not paid. The visits are grouped by Patient, with totals given for each Patient, and a grand total for each Contract. This report may be run for a single Patient or Invoice.
Rejected/Pended Invoices	Billing > Electronic Billing > E-Remittance Search > Search > Select Rejected Value	In the "Rejected" column of the Remittance Search page, users may click the rejected amount to generate a PDF that lists the visits associated with the claim that were rejected.



Exception Summary by Provider, Caregiver, Office & More



Locate visits that have exceptions to ensure your EVV data matches with what your payers are seeing.

HAExchange **Exception Summary By Provider (New)** Page 1 of 1
Report Date: 01/18/2024 11:07

Office(s): Payroll Implementation	Coordinator: All
Type of Service: Non-Skilled	From Date: 1/1/2024 To Date: 1/18/2024
Caregiver Team(s): All	Caregiver Location(s): All Caregiver Branch(es): All
Contract(s): All	

Sr.#	Provider ↓	Contract ↓	Total
1	Northeast Homecare Services	Chase Health	
Total:			

HAExchange **Exception By Caregiver (New)** Page 1 of 1
Report Date: 01/18/2024 11:08

Office(s): Payroll Implementation	From Date: 1/1/2024	To Date: 1/18/2024
Caregiver: All	Type of Service: Non-Skilled	Coordinator: All
Discipline(s): All	Caregiver Location(s): All	Contract(s): All
Caregiver Team(s): All	Caregiver Branch(es): All	

Sr.#	Caregiver Code ↓	Caregiver Name ↓	Contract ↓	Confirmed Visits ↓	Billed Visits ↓	Missed Visits ↓	Exceptions ↓	% Exceptions ↓
Northeast Homecare Services								
1	REN-2122	Lopez Cynthia	Chase Health	0	0	0	0	0.00%
2	REN-2123	Patel Franklin	Chase Health	0	0	0	0	0.00%
3	REN-2180	Paulet Renzo	Chase Health	0	0	0	0	0.00%
Total:				0	0	0	0	
Grand Total:				0	0	0	0	



EVV Aggregation Report // Agency Response Report



Identify which visits have been sent to the aggregator, reducing denials.

The screenshot displays the HHAeXchange Report Center interface. At the top left is the logo and the text "HHAeXchange Report Center". At the top right, it says "Welcome - RNortheastSupport (Northeast Homecare Services)". Below this, the page title is "State Aggregation Report" and the version information is "NPRODWEBRP1 Report No. 1090 HHA Reports - Version 2.98".

The main form area is titled "State Aggregation Report" and contains the following fields:

- * State:** Select (dropdown menu)
- Report Type:** MCOs (selected), FFS, PH MCOs, Aetna, Geisinger (radio buttons)
- Report Section:** Caregiver, Patient, Visits (selected) (radio buttons)
- Office(s):** Payroll Implementation (dropdown menu)
- Contract(s):** All (dropdown menu)
- Caregiver:** (text input field)
- Procedure Code(s):** All (dropdown menu)
- Visit From Date:** (calendar icon)
- * Last Export From Date:** 10/18/2023 (calendar icon)
- Patient:** (text input field)
- Record Status(es):** Failed (dropdown menu)
- Visit To Date:** (calendar icon)
- * Last Export To Date:** 01/18/2024 (calendar icon)
- Medicaid Number:** (text input field)


At the bottom of the form, there are two buttons: "Print Excel" and "Generate Report" (with an information icon). Below the buttons is a note: "Note: If user is logged in via support user 'Medicaid Number' Filter won't be accessible. Report will show data from visit date 12/15/2020 and forward."



Missed Visits Report



Understand reasons for missed visits and resolve potential future missed visits.

 Missed Visit By Provider Page 1 of 1														
Office(s): Donald's Office From Date: 1/1/2023 Patient Team(s): All Show All Notes: No					Contract: All To Date: 1/18/2024 Patient Branch(es): All					Patient: All Coordinator: All Patient Location(s): All Report Date: 01/18/2024 15:37				
SR #	Date	Admission ID	Patient Name	Provider Name	Coordinator	Contract	Caregiver Code	Caregiver Name	Schedule	TT	Note	Reason	Action Taken Reason	Program Code
1	04/04/23	DNL-7897654654322672	BLACK FREDA	Northeast Homecare Services	Donald Dennis	Aetna	1000	Temp Temp	0900-1400			Cancellation	Remove Visit from Schedule	
2	06/06/23	DNL-7897654654321439	Grands Erlinda	Northeast Homecare Services	Donald Dennis	Aetna	DNL-1359	Dennis Donald	0900-1300			Caregiver Absence	Reschedule Visit
3	07/03/23	DNL-7897654654321426	Dashmont Breana	Northeast Homecare Services	Donald Dennis	Aetna	DNL-1353	Cunningham Brenda	0800-2000	01:00	Patient was not home at time	Patient refused Caregiver	

Visit Verification Compliance



Understand the breakdown of EVV methods used by your caregivers (IVR, Mobile, FOB).

HHAeXchange Report Center

Welcome - **RNortheastSupport (Northeast Homecare Services)**
NPRODWEBRP1 Report No. 938 HHA Reports - Version 2.98

Visit Verification Compliance

Visit Verification Compliance

Office(s)	Payroll Implementation	* From Visit Date	mm/dd/yyyy	* To Visit Date	mm/dd/yyyy
Contract(s)	All	Caregiver Location(s)	All	Caregiver Branch(es)	All
Caregiver Team(s)	All	Patient Location(s)	All	Patient Branch(es)	All
Patient Team(s)	All	Coordinator(s)	All	Verification	All
Caregiver		Discipline(s)	All		
EVV Type(s)	All				

Print EXCEL **Generate Report** ⓘ

Note : This report provides information on the clock-in and clock-out activities by caregivers for visits within a specified time frame and provides a breakdown of the percentage of EVV verified visits by the EVV type(s) used to confirm the shift.

The "FOB Verified" statistics considers all FOB confirmed visits irrespective of whether the FOB confirmation was performed via the mobile app or by phone.

The "Mobile App Verified" statistics considers non-FOB visits which have been confirmed via GPS.

Since a single visit can be confirmed using more than one EVV type and do the various clock in and out procedures offered by HHAeXchange (Multiple Services, Linked /Mutual Cases, etc.) the total EVV verified visit count may not always equate to the total sum of the FOB, IVR, GPS and Beacon verified visit counts.



Authorization Over Utilized



Determine whether patients schedules for specific contracts, visits, or disciplines are exceeding the authorization units.

The screenshot shows the HHAeXchange Report Center interface. At the top left is the logo and text 'HHAeXchange Report Center'. At the top right, it says 'Welcome - RNortheastSupport (Northeast Homecare Services)'. Below this is a header bar with 'Authorizations Over Utilized' on the left and 'NPRODWEBRP1 HHA Reports - Version 2.9' on the right. The main content area is titled 'Authorizations Over Utilized' and contains several filter fields: 'Office(s): Payroll Implementation', 'From Date: 12/01/2023', 'To Date: 12/31/2023', 'Contract(s): All selected', 'Visit Type: NonSkilled', 'Coordinator: All', 'Patient Team(s): All selected', 'Patient Location(s): All', 'Discipline: All', and 'Patient Branch(es): All'. At the bottom of the filter section are two buttons: 'View Report' and 'Generate Report', followed by an information icon.



List of Caregivers (ENT)



Report on caregivers based on demographics.

HHAExchange Report Center Welcome - RNortheastSupport (Northeast Homecare Services)
NPRODWEBRP1 Report No. 116 HHA Reports - Version 2.98

List of Caregivers

List of Caregivers

Office(s) Discipline(s)

Caregiver Code First Name Last Name

Type Status Sort By

Hire Date From Hire Date To Hired Month

Last Work Date From Last Work Date To

Caregiver not logged in to the mobile app since days

Terminated Date From Terminated Date To

Application Date From Application Date To Restriction

Caregiver Team(s) Caregiver Location(s) Caregiver Branch(es)

This report displays a list of caregivers with the option to select from many caregiver attributes for display, as well as a number of sorting options.

Select Caregiver Demographics Columns

[Check All](#) [Clear All](#)

First Name Middle Name Last Name
 Initials Gender Date of Birth
 Caregiver Code Time & Att. Pin Alternate Caregiver Code
 Ethnicity SSN Marital Status
 Discipline Dependents Caregiver Picture
 Country of Birth Rehire Date Mobile ID
 Mobile ID Status Caregiver Mobile App Availability Allow Caregiver to Select Community Visit

Select Caregiver Employment Columns

[Check All](#) [Clear All](#)

Referral Source Referral Person Application Date
 Type Status Reference1
 Reference2 Termination Date 105 Sent



Conflict Report



Flag potential issues by comparing a caregiver's billed visit information with other HHAExchange customers to identify overlaps, which could prevent takebacks and revenue loss.

The screenshot shows the HHAExchange web application interface. At the top, there is a navigation bar with the HHAExchange logo and several menu items: Home, Patient, Caregiver, Visit, Action, Billing, Report, Dashboards, and Admin. Below the navigation bar, the main content area is titled "Conflict Report". Underneath this title is a "Conflict Report Search" section with three input fields: "Visit Date From:" with the value "10/01/2023", "Billed Date From:" which is empty, and "Contract:" with a dropdown menu set to "All". To the right of the search fields is a vertical menu with various options: In Service, Pending Placement Queue (Provider), Event Log (Provider), Payroll, Confirm Visits, Confirm Paper Duty, Order Tracking, Time Batch Search, Confirm Timesheet, Edit Services, Conflict Report (highlighted), Broadcast Message, and Exclusion/Verification Lists. Below the search fields, there is a list of bullet points: "Conflicts as of 04/10/2020 09:37 AM", "Conflict Reports are processed every night", and "Conflict Report only runs for dates after 01/01/2012".



Billing Claims Status Report



Capture details on the status of claims over a specified time, by contracts, offices, and more.

The screenshot shows the HHAeXchange web application interface. At the top, there is a navigation bar with the HHAeXchange logo and several menu items: Home, Patient, Caregiver, Visit, Action, Billing, Report, Dashboards, and Admin. The 'Report' menu is currently open, displaying a list of reporting options. The 'Claim Status Report' option is highlighted in blue. Other options in the 'Report' menu include Reporting Tool (2.0), Admin, AR, Billing, Caregiver, Compliance, DOH, Events, Exception Reports, Month End Reports (V4), Other Reports, and Patients. The 'Billing' menu item also has a sub-menu open, showing options like E-Billing, Invoicing, Medicaid, PreBilling, UnBilled, Accrued Minutes, Claim Status Report, E-Billing Denial Report, and Electronic Remittance Preview Report. The main content area of the page shows a 'Home' section with a 'Link Communication' button, a 'Notifications (103)' indicator, a search bar, and sections for 'Pending Placements' and 'Events'. The search bar has a dropdown menu set to 'All'.



Billing Report



See billing/visit details for all visits billed within a selected date range by contract.

HHAeXchange Report Center

Welcome - RNortheastSupport (Northeast Homecare Services)
NPRODWEBRP1 Report No. 686 HHA Reports - Version 2.98

Billing Report

Office(s)	Payroll Implementation	*Visit From Date	mm/dd/yyyy	*Visit To Date	mm/dd/yyyy
Contract(s)	All	Caregiver		Patient	
Batch From Date	mm/dd/yyyy	Batch To Date	mm/dd/yyyy	Batch Number	
Group By	Contract	<input type="checkbox"/> Include Summary by Service Code			
Patient Team(s)	All	Patient Location(s)	All	Patient Branch(es)	All

This report lists, by contract, billing/visit details for all visits billed within either the selected visit date and/or batch date ranges. Totals for each contract are shown. This report may be run for the selected caregiver, patient, billing batch, contract(s), patient team(s), patient location(s), patient branch(es), or office(s). In addition, the report may be grouped and summarized by contract, patient, caregiver, or patient team.

Generate Report ⓘ



Q&A



Thanks for joining us!