

PRODUCT PULSE

You Ask, We Answer!

July 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
- You Ask, We Answer!
- Partner of the Month: ADP
- Q&A

Welcome! Meet the Speakers



Alex Mastrianni

Sr. Product Marketing
Manager, HHAeXchange



Jon Franqui

Sr. Product Manager,
HHAeXchange



Joey Hamilton

Sr. Client Success Manager,
HHAeXchange



Jeremy Lisch

Homecare Division Lead,
ADP



What's New

Recent Product News



Recent Product Updates



- Union Insurance Included in Invoice
- Dashboard Menu Redesign
- Payer Care Insights Responses & Alert Report

See what's new at:
knowledge.hhaexchange.com

HHAeXchange Contract Care Insights Responses & Alerts Page 2 of 2
Report Date: 06/04/2024 07:04 AM

Contract Name		Patient Count	
Demo Payer Live to ML - 13759		3	
Life Care Demo Payerrr - 13437		1	

Patient Name	Contract Name	Admission ID	Open Alerts	Closed Alerts	Cohort Description
Jeet 2000 ft Shah	Life Care Demo Payerrr	778899	3	0	The Base Cohort contains the full member population and is used to track Care Insights related to quality indicators, changes in conditions, and general health risk factors.

Patient Name	Contract Name	Visit Date	Question	Note	Response	Priority	Status	Alert Text
					No	Moderate	Open	Test DEX from Question
					Yes	Critical	Open	alert critical
					No	Moderate	Open	No selection - Alert Text / Description

Patient Count	Status
1	Active
1	Active

General Billing Rates **Billing/Collections** Scheduling/Confirmation Duty Mapping

General Billing and Collections Configuration

Contract-Level Additional Info Invoice Setup
 Billing will be generated per Authorization
 Additional Info - HCFA 1500 ⓘ
 Additional Info - UB-04 ⓘ

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

Invoice Type ⓘ Round On
 Invoice 35 15

Timely Filing Limit ⓘ Days Invoice

Billing Reference Person ⓘ Default Int
 Select

Enable Banked Minutes Processing ⓘ Enable
 Banked Minutes Configuration

Always Bill on Confirmation Duration ⓘ

Enable Union Insurance Rate ⓘ

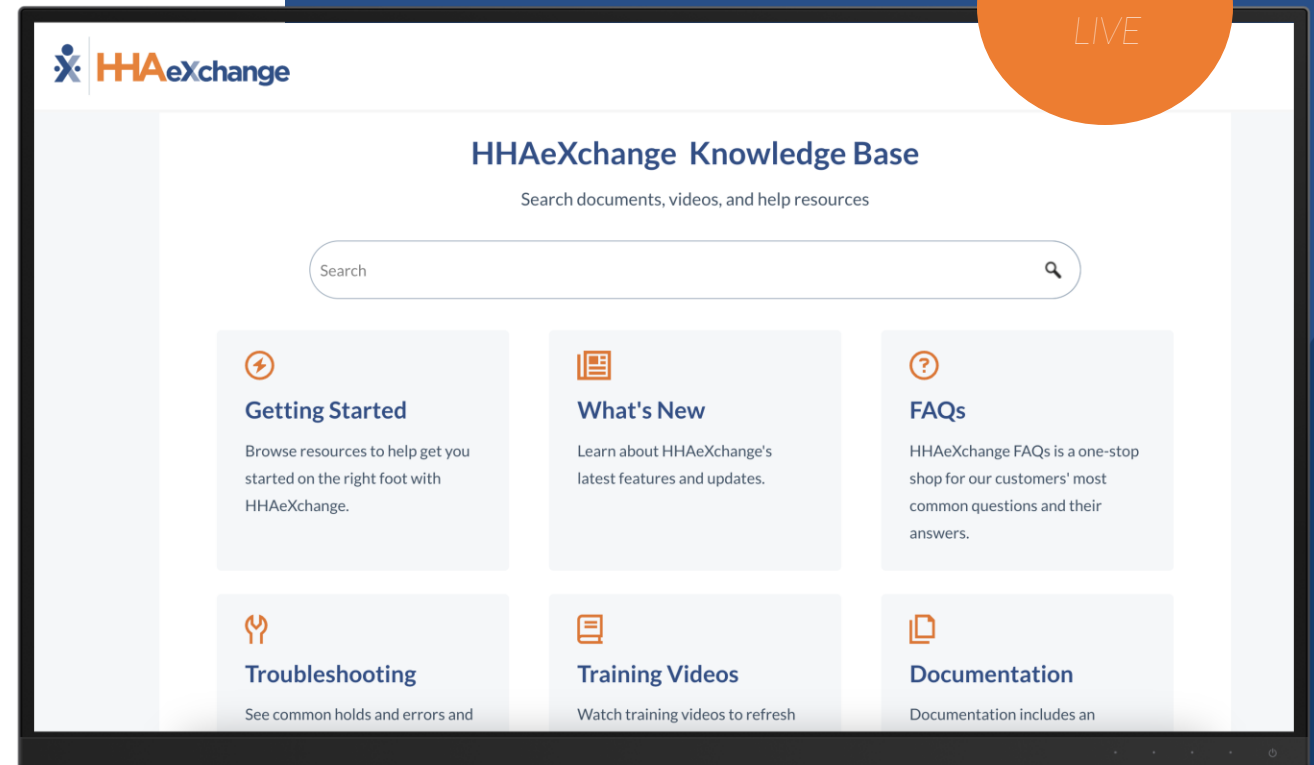
Default Billing DX Code(s) ⓘ



The new & improved HHAeXchange Knowledge Base

- Quickly find the content you need
- Diversified content formats, including more videos
- Refreshed Top 100 FAQ Articles
- New! Trending Topics

NOW
LIVE



Check it out today:
knowledge.hhaexchange.com



 **Caregivers: Update Your Apps!** 



All mobile app users must update to the latest version of their HHAeXchange Mobile App by Wednesday, July 31.



**HHAeXchange
Mobile App**



**HHAeXchange+
Mobile App**





You Ask, We Answer!

Q&A



**What is the best way to learn more about payroll reports?
Is there a training you would recommend?**



Payroll Reports



The screenshot shows the HHAExchange 'Reports' page. The left sidebar lists various report categories, with 'Payroll Reports Definitions' highlighted in a red box. The main content area shows a list of report definitions, including 'AR Reports Definitions', 'Billing Reports Definitions', 'Caregiver Reports Definitions', 'Clinical Reports Definitions', 'Compliance Reports Definitions', 'Creating an Ad Hoc Report', 'DOH Reports Definitions', 'Events Reports Definitions', 'Exception Reports Definitions', 'Miscellaneous Reports Definitions', 'Patient Reports Definitions', and 'Sales Reports Definitions'. A red box highlights 'Payroll Reports Definitions'.

The detailed view of the 'Payroll' module is shown in a red-bordered box. It includes the following content:

- Home**
- Getting Started**
- What's New**
- Frequently Asked Questions**
- Troubleshooting**
- Training Videos**
- Documentation**
- Contact and Support**

Payroll

The Payroll module is used to create or edit existing payroll configurations. This configuration defines the parameters of your Agency's payroll structure.

Learn to

- Establish a payroll setup
- Create pay codes and pay rates
- Understand the payroll process
- Generate payroll reports

Payroll Overview 5 min.

Pay Codes and Pay Rates 7 min.

Payroll Batch Process 7 min.

Payroll Reports 8 min.

Payroll Setup 5 min.



How do you create an every-other-weekend Master Week Schedule?



Alternate Master Weeks



Patient Info - Active ALERT !

Name: McBride Harriet (Default)	Admission ID: LIC-56789	Patient ID: 345678	Contract: Caring Hands LLC
DOB: 01/01/1910	Primary Alt. Patient ID: 12345	Home Phone: 123-456-7890	Address: 1 Court Square, LONG ISLAND CITY, NY, 11101
Coordinators: Jon Franqui	Office: Long Island City	Languages: English	

Last 3 authorizations

Contract	Auth. #	From Date	To Date	Discipline	Svc. Code	Max units for Auth	Type	Period	Max.	S	M	T	W	T	F	S	Remaining Units	Notes	
Caring Hands LLC	12345	02/01/2020	04/28/2025	HHA	HHA Standard	N/A	Hourly	Weekly											
Amazing Health	3024	03/01/2024	03/31/2024	HHA	HHA - Hourly	N/A	Hourly	Weekly											
Caring Hands LLC	67891	05/01/2023	05/31/2023	HHA	USP Test	N/A	Hourly	Entire P											

Master Week

02/01/24 - 03/31/24

	Sunday Alt.	Monday Alt.	Tuesday Alt.	Wednesday Alt.
Hours:	<input type="text"/> - <input type="text"/>	<input type="text" value="1800"/> - <input type="text" value="2000"/>	<input type="text"/> - <input type="text"/>	<input type="text" value="1800"/> - <input type="text" value="2000"/>
Caregiver:	<input type="text"/>	<input type="text" value="LIC-1065"/> Franqui Jon	<input type="text"/>	<input type="text" value="LIC-1065"/> Franqui Jon

From Date: To Date: Save & Update Ca

Add Alternate Masterweek Shift for Tuesday

Hours: -

Caregiver: ?
Anderson Rebecca

Assi. ID:

Pay Code:

POC:

Bill To:

H: **M:**

Service Code:

Rate Type: Hourly

Include in Mileage:

Save
Close



**Is “Generations” going to be
a part of HHAeXchange?
Or just a recommended
product?**



Generations Acquisition



- Generations will be run as a separate business unit.
- HHAeXchange Customers will continue to use the same product and work with the same team for their support needs.
- We will continue to listen to your feedback!



**HHAeXchange
Acquires Generations
Homecare System,
Enhancing its Software
Platform for Homecare
Stakeholders**



Our patients supposed to be able to go out into the community but our caregivers cannot log in or out away from home without creating a GPS error. Do you plan to address this?



Community Based Visits



- Home
- Getting Started
- What's New
- Frequently Asked Questions
- Troubleshooting
- Training Videos
- Documentation
- Contact and Support

You are here: [Documentation](#) / [Mobile](#) / Mobile App: Community Visits

Mobile App: Community Visits

This option allows Agencies to link a visit marked as a **Community Visit** to bypass the validation for tolerance set in Office Settings in the **Mobile** section. When enabled, visits marked as Community Visits are linked automatically. The **Community Visit** option applies to **Scheduled** and **Unscheduled Visits**.

Community Visits: Office Level Setting

To enable the **Community Visit** setting, go to the **Office Setup** page under **Admin > Office Setup** and select the **Allow Caregiver to select the visit as a Community visit** checkbox in the **Mobile** section, as seen in the following image. Once the feature is enabled at the Office level, all mobile-enabled Caregivers can select the Community Visit option on the HHAExchange Mobile App.



There are multiple patients that are no longer active within our agency, however they are still showing up active under our patient list. How can these inactive patients be removed from our active list?



Discharging Patients



Patient Info Active **ALERT!**

Name: McBride Harriet (Default) **Admission ID:** LIC-56789 **Patient ID:** 345678 **Contract:** Amazing Health, Auth Test Contract, Caring Hands LLC, Private Pay

DOB: 01/01/1910 **Primary Alt. Patient ID:** 1234 **Home Phone:** [123-456-7890](tel:123-456-7890) **Address:** 1 Court Square, LONG ISLAND CITY, NY, 11101

Coordinators: Jon Franqui **Office:** Long Island City **Languages:** English

Contracts

Contracts

Add

Placement ID	Contract	Is Primary Contract	Alt Patient ID	Service Start Date	Source Of Adm	Service Code	Discharge Date	Discharge To	Additional Options	
2947511	Auth Demo Contract	<input type="checkbox"/> H	Edit H	06/30/2020		Edit H	02/01/2023	Admin Discharge	Additional Options	X
2291573	Auth Demo Contract	<input type="checkbox"/> H	1234 H	04/16/2019		Edit H	06/30/2019	CHHA	Additional Options	X
2164933	Auth Test Contract	<input type="checkbox"/> H	Edit H	01/01/2019		Edit H	Edit		Additional Options	X
2132363	Auth Demo Contract	<input type="checkbox"/> H	Edit H	01/01/2019		Edit H	04/15/2019	Admin Discharge	Additional Options	X
1694107	Amazing Health	<input checked="" type="checkbox"/> H	1234 H	04/16/2018		HHA - Hourly H	Edit		Additional Options	X
1325774	Private Pay	<input type="checkbox"/> H	Edit H	04/01/2017		HHA Hourly-T1020 H	Edit		Additional Options	X
911660	Caring Hands LLC	<input type="checkbox"/> H	12345 H	12/02/2015		Edit H	Edit		Additional Options	X



Discharging Patients



Patient Info - **Discharged** **ALERT!**

Name: McBride Harriet (Default)
DOB: 01/01/1910

Admission ID: LIC-56789
Primary Alt. Patient ID: 1234

Patient ID: 345678
Home Phone: [123-456-7890](tel:123-456-7890)

Contract:
Address: 1 Court Square, LONG ISLAND CITY, NY, 11101

Coordinators: Jon Franqui

Office: Long Island City

Languages: English

Contracts

Contracts

Contracts

Add

Placement ID	Contract	Is Primary Contract	Alt Patient ID	Service Start Date	Source Of Adm	Service Code	Discharge Date	Discharge To		
2947511	Auth Demo Contract	<input type="checkbox"/> H	Edit H	06/30/2020		Edit H	02/01/2023	Admin Discharge		Additional Options
2291573	Auth Demo Contract	<input type="checkbox"/> H	1234 H	04/16/2019		Edit H	06/30/2019	CHHA		Additional Options
2164933	Auth Test Contract	<input type="checkbox"/> H	Edit H	01/01/2019		Edit H	07/22/2024	Admin Discharge		Additional Options
2132363	Auth Demo Contract	<input type="checkbox"/> H	Edit H	01/01/2019		Edit H	04/15/2019	Admin Discharge		Additional Options
1694107	Amazing Health	<input checked="" type="checkbox"/> H	1234 H	04/16/2018		HHA - Hourly H	07/22/2024	Admin Discharge		Additional Options
1325774	Private Pay	<input type="checkbox"/> H	Edit H	04/01/2017		HHA Hourly-T1020 H	07/22/2024	Admin Discharge		Additional Options
911660	Caring Hands LLC	<input type="checkbox"/> H	12345 H	12/02/2015		Edit H	07/22/2024	Admin Discharge		Additional Options



**Are you able to
upload documents to
a clients' file?**



Upload Documentation



Enterprise 24.07.01 NPRODWEB2 : 443 chrome 126 (Doc Chrome 126) 7/22 09:27 EST

Patient Document Management

Patient Info - Active **ALERT!**

Name: McBride Harriet (Default) **Admission ID:** LIC-56789 **Patient ID:** 345678 **Contract:** Caring Hands LLC
DOB: 01/01/1910 **Primary Alt. Patient ID:** 1234 **Home Phone:** 123-456-7890 **Address:** 1 Court Square, LONG ISLAND CITY, NY, 11101
Coordinators: Jon Franqui **Office:** Long Island City **Languages:** English

Patient Documents **Visit Documents**

Document Management

Add Document

From Date: **To Date:** **Document Type:** Note

Search

Documents

Description	Document Type	Document Date	Created By	Entry Method	Status	Action
Scanned document for Contract: [Caring Hands LLC]	Contract	03/28/2016 14:03 PM				
Scanned document for Advance Directive History: [DNR]	Advance Directive	02/09/2016 11:12 AM				
Scanned document for Note: [02/03/2016 4:24:17 PM]	Note	02/03/2016 16:24 PM				
Scanned document for Timesheet: [01/05/2016 1000-1400]	Timesheet	01/07/2016 15:16 PM				

Clinical

Search

First Name:
Last Name:

Document Management - Work - Microsoft Edge

https://app2.hhaexchange.com/ENT2407010000/Patient/InternalPatien...

Document Management

* **Document Type:** ----Select----

* **Description:**
(Upto 1000 Characters)

Document:

Note: Files must be 20 MB in size or smaller.

Save **Cancel**



**We would like to separate
the office and each can
access only his department
client, can we do that?**



Office Setup



Update User Account

* First Name:

* Last Name:

Login Name: ⓘ

Status: ⓘ

* Role: ⓘ

* E-mail:

Show Open Cases from: Today Till Days ⓘ

[Change Password](#) [Reset Password](#)

Pending Placement Notifications: ⓘ

Grant Access to Reporting Tool: ⓘ

Care Insights On-Call User: ⓘ

On Call for Selected Alert Priority: ⓘ

Accept Unspecified Office Placements: ⓘ

IP Restricted IP1: IP2: IP3: ⓘ

Hourly Restricted

Day	From	To	IP ⓘ
Mon:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tue:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wed:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Thu:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fri:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sat:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sun:	<input type="text"/>	<input type="text"/>	<input type="text"/>

SSN#: ⓘ ⓘ
(e.g. xxx-xx-xxxx)

History

Office Setup

View Care Insights Alerts for--%>

Office	Is Coordinator	View Open Cases for ⓘ	Can Override OT Limit	Primary		
<input type="text" value="Chuck Demo"/>	<input type="checkbox"/>	<input type="text" value="Select"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	H
<input type="text" value="Jeet Office new"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	H
<input type="text" value="Excellence-AMD"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	H

Add

Clinical Access

Clinical Access Configuration

Restrict Patient Access: ⓘ

Can Edit Docs Initiated by Other User: ⓘ

History



Office Setup



Pending Placement Notifications: ⓘ

Grant Access to Reporting Tool: ⓘ

Care Insights On-Call User: ⓘ

On Call for Selected Alert Priority: ⓘ

Accept Unspecified Office Placements: ⓘ

Office Setup

View Care Insights Alerts for--%>

Office	Is Coordinator
<input type="text" value="Chuck Demo"/>	<input type="checkbox"/>
<input type="text" value="Jeet Office new"/>	<input type="checkbox"/>
<input type="text" value="Excellence-AMD"/>	<input type="checkbox"/>

Clinical Access

Clinical Access Configuration

Restrict Patient Access: ⓘ

Clinical Access Patient Assignment

Patient Last Name:

Patient DOB: ⓘ

Operation Worklist Setup

Assign Worklists:

Allow User to Assign Tasks: ⓘ

Set Operation Worklist as Landing Page: ⓘ

- Physician Setup
- Reference Table Management
- Workflow Management
- Agency Profile
- Dynamic Invoice Setup
- Custom Export
- Update Auto Pay Rate
- Payroll Mapping (PTHC Westchester)(Training)
- Payroll Mapping (PTHC Long Island)(Training)
- Payroll Mapping (PTHC Westchester)
- Payroll Mapping (PTHC Long Island)
- Payroll Mapping (PTHC Jamaica)(Training)
- Payroll Mapping (PTHC Jamaica)
- Update Auto PR NY Staffing
- Update Auto PR NJ Office
- Update Auto PR Private Duty
- Report Subscription
- Update Unbilled Visits CPRO
- Process Monitor
- I-9 compliance
- Search Contract
- Family Portal Global Management
- Cash Receipts Export
- IIF Export
- Background Report Monitor
- Duty List Setup
- Org. Structure
- Office Setup
- Payroll Setup
- Initiate Processing
- File Processing
- SFTP Setup
- EDI Tool
- Forms

SSN#: ⓘ ⓘ
(e.g. xxx-xx-xxxx)

View Open Cases for ⓘ	Can Override OT Limit	Primary		
<input type="text" value="Select"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

[History](#)

Can Edit Docs Initiated by Other User: ⓘ

Name: Patient Admission ID:

Access:

Default Worklist: ⓘ

Allow User to Manually Close Tasks: ⓘ



Do you have any plans to improve support? Live chat takes too long to answer, and many times it takes hours.



Improved Support Initiatives



- **Team Expansion**, including a new call center in Minneapolis
- **Workforce Optimization**, to improve efficiency
- **Boosting Care Agent Knowledge**, with better training for our team
- **Better Customer Onboarding & Knowledge**, to find what you need faster and easier





**How do we enable case
broadcasting and mobile app
messaging to enhance
coordinator & caregiver
communication?**



Case Broadcasting



Edit Roles

* Section: Visit Roles: ADMIN

Search

Please note that changes in permissions will not take effect until the user logs out and then logs back in.

Menu	ADMIN
Visit	<input checked="" type="checkbox"/> H
EditCallAudit	<input checked="" type="checkbox"/>
EditDutySheet	<input checked="" type="checkbox"/>
EditAuthorizationAllocation	<input checked="" type="checkbox"/>
Broadcast Open Case	<input checked="" type="checkbox"/>
Assign or Reject Open Shift Request	<input checked="" type="checkbox"/>
Patient Visit Family Dashboard	<input checked="" type="checkbox"/> H
Resolve Visit Exceptions	<input checked="" type="checkbox"/>
Approve Schedule Change Requests	<input checked="" type="checkbox"/>
Quick Visit Entry	<input checked="" type="checkbox"/>
Caregiver Awake Confirmation Dashboard	<input checked="" type="checkbox"/>
View Verification Tab	<input checked="" type="checkbox"/>
Edit Verification Tab	<input checked="" type="checkbox"/>
Residing Caregiver	<input type="checkbox"/>
Edit Family Contact	<input checked="" type="checkbox"/>



Case Broadcasting



Enterprise 24.07.01 NPRODWEB4 : 443 (Chrome/126.0.0.0) chrome 126 (Doc Chrome 126) 7/23 09:11 EST

Edit Office [History](#)

General

* Office Name: Status:

Minimum Duration for Overnight Shifts:

Service Types for Overnight Shifts: [i](#)

Mobile [History](#)

Mobile Fixed Visit Verification: [i](#)

Mobile GPS Visit Verification: Tolerance Range (ft): [i](#)

UnBalanced Tolerance: Hours Min [i](#)

Mobile Beacon Verification: [i](#)

Open Case Settings: View Open Cases [i](#)

Request and Accept Open Cases [i](#)

Acceptance Request Limit [i](#)

Allow Single Clock in/out for Consecutive Shifts (Mobile App): [i](#)

Enterprise 24.07.01 NPRODWEB4 : 443 Chrome 126 (Doc Chrome 126) 7/23 09:07 EST

Caregiver Info [History](#)

Caregiver Info Active

Name: Anderson Rebecca Caregiver Code: LIC-1003 Office: Long Island City
 Team: Boris's Team Provider: Northeast Homecare Services Phone: 111-110-1111 Availability Updated: 3/15/2024
 Address: 4555 41st Street Languages: English DOB: 01/01/1990 [i](#) Caregiver Hours: H: 0 [i](#)
 Long Island City, NY, 11104 V: 0

Caregiver Mobile App/Portal Settings

Open Case Acceptance: View Open Cases [i](#)

Request and Accept Open Cases [i](#)

Caregiver Time Correction: Allow Caregiver to modify Confirmed Time via the mobile app [i](#)

Allow Caregiver to enter Time via the mobile app when there is no preexisting EVV [i](#)

Set Availability via Mobile App: [i](#)

Permanent Week Availability Last Edited: 3/15/2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
1000-1500	1000-1700	1000-1700	1200-1800	1200-1700	1200-2000 Live-In		Edit	<input type="button" value="X"/>
	Live-In						Edit	<input type="button" value="X"/>

Max Visits [History](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4	2	4	2	2	4	0



Case Broadcasting



Visit Search

From Date: To Date: Office(s): Discipline:

Patient Last Name: Patient First Name: Admission ID: Contract:

Coordinator: Patient Team: Patient Location: Patient Branch:

Caregiver Last Name: Caregiver First Name: Caregiver Code: Assignment ID:

Caregiver Team: Caregiver Location: Caregiver Branch: Timesheet:

Billed: Paid: Search Open Schedules:

Page Loaded in 0.293 second(s).

Search Results Total Visits : 11 Total Call In : 0 Total Call Out : 0 Page 1 of 1

Coordinators	Admission ID	Patient Name	Caregiver Code	Caregiver Name	Assignment ID	Office	Visit Date	Schedule	Visit	I	O	Billed	P	Contract	Discipline	
Jon Franqui	900064	Guide David			010101	Long Island City	07/29/2024	1200-1400		N	N	N	N	Amazing Health	HHA	
Jon Franqui	900064	Guide David			010101	Long Island City	07/28/2024	1200-1400		N	N	N	N	Amazing Health	HHA	
Jon Franqui	900064	Guide David			010101	Long Island City	07/27/2024	1200-1400		N	N	N	N	Amazing Health	HHA	
Jon Franqui	56789	McBride Harriet			010101	Long Island City	07/27/2024	0800-1000		N	N	N	N	Caring Hands LLC	HHA	
Jon Franqui	900064	Guide David			010101	Long Island City	07/26/2024	1200-1400		N	N	N	N	Amazing Health	HHA	
Jon Franqui	56789	McBride Harriet			010101											
Jon Franqui	900064	Guide David			010101											
Jon Franqui	56789	McBride Harriet			010101											
Jon Franqui	900064	Guide David			010101											
Jon Franqui	56789	McBride Harriet			010101											
Jon Franqui	56789	McBride Harriet			010101											

Non Skilled Visit: User update

Admission ID: LIC-900064 Patient Name: Guide David

Visit Date: 07/29/2024 Patient Phone #: 973-742-2712

Assignment ID: 010101 Coordinators: Jon Franqui

Schedule: History

* Schedule Time: - Temporary Caregiver Code: Temporary

POC: Assignment ID: 010101 Pay Code:

* Primary bill to: [History](#) Secondary bill to: [History](#)

* Service Code: Service Code:

* H: M: H: M:



Is there an alert feature that reminds us about expired documents of aides in the system?



Worklists

[Expiring Caregiver Medical/Other Compliance \(0\)](#)
[Expiring Authorization \(0\)](#)
[Unstaffed Visits \(0\)](#)
[Expiring Master Week \(0\)](#)
[Expiring Certification Period \(0\)](#)

Search Expiring Caregiver Medical/Other Compliance

Office
 DEVOTION HC

Medical/Other Compliance Item
 All

Expiration
 Within 30 days

Assignee
 All

Status
 Open

+ Advanced Filters

Search Reset

Expiring Caregiver Medical/Other Compliance ?

Display: All [Bulk Actions](#)

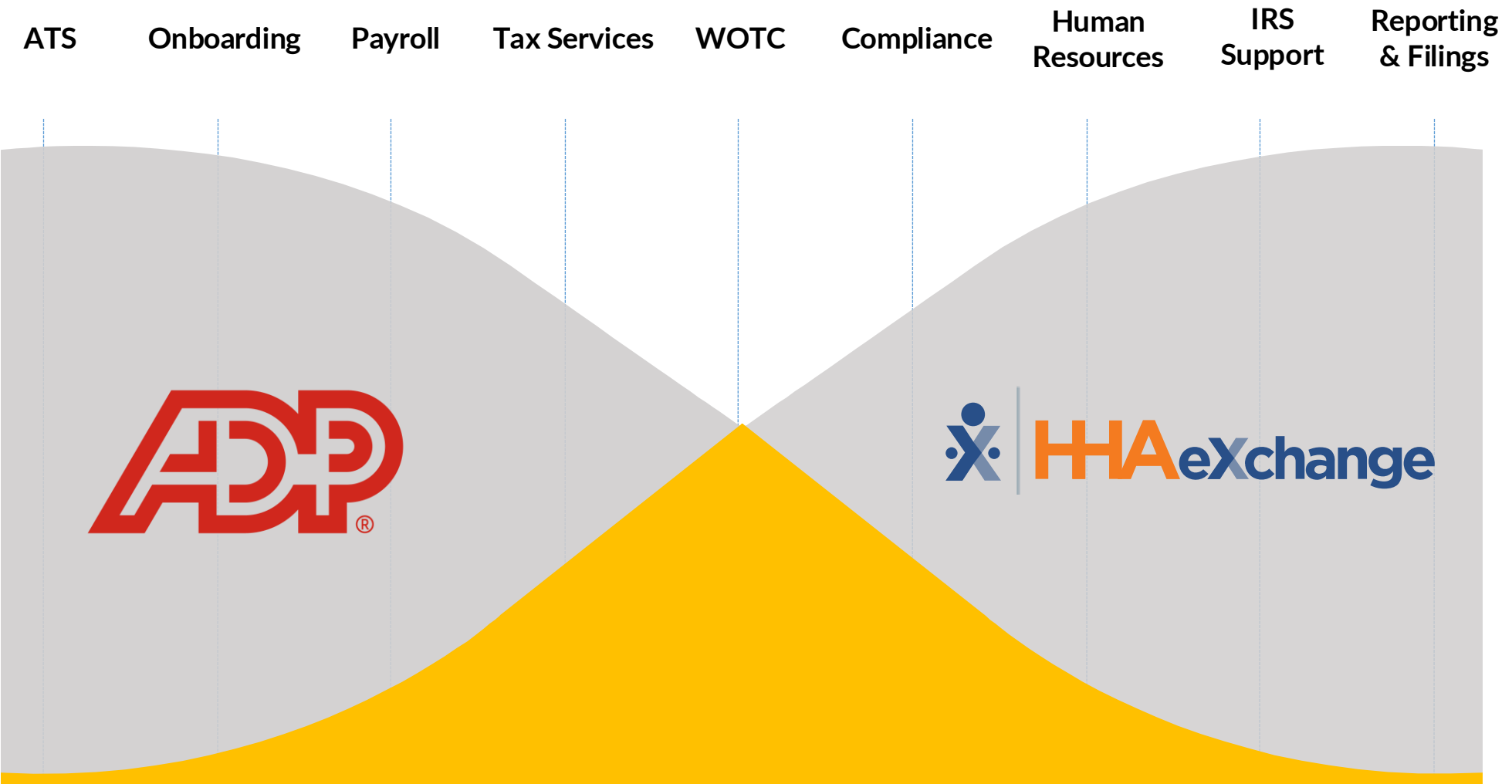
<input type="checkbox"/>	Expiring Medical	Expiration Date	Reported On	Caregiver	Last Note Entered	Assignee	Status	Actions
<input type="checkbox"/>	Blue measles	05/25/2023	04/25/2023	Carmelo Anthony CODE: DVT-1654			Open	...
<input type="checkbox"/>	Blue measles	04/13/2023	03/20/2023	John Doe CODE: DVT-1789	Task is unassigned.		Open	...
<input type="checkbox"/>	PPD	02/08/2023	12/25/2022	Olivia Benson CODE: DVT-1762	Task assigned to Lincoln Gruber	Lincoln Gruber	Open	...
<input type="checkbox"/>	Drug Screen	02/08/2023	11/24/2022	Olivia Benson CODE: DVT-1762			Open	...
<input type="checkbox"/>	Blue measles	01/28/2023	12/29/2022	Kevin Smith CODE: DVT-1764	Mobilemessaging Message sent.	Steve Clarke	Open	...



Partner Highlight

ADP

Partnership & What ADP Does





Compliance Proactively Before You Need to be Reactive



- Classify new hires properly (Workers Comp, State + Federal)
- WOTC Applications (Get Government Money Owed to You)
- Provide handbook and other disclosures (with eSign Offs)
- Background checks (Where appropriate)
- Proper Payroll & Tax Setup w/ accurate jurisdictions, Union dues, etc.
- Properly track, deduct, and disperse deductions
- Appropriately deduct, prepare, & process Quarterly and EOY Filings

Trusted by Homecare Agencies Like Yours

“Bringing on ADP as my payroll and HR system of record allows my HR team to accurately track new hires, terminations, and leaves. Being able to see PTO balances in real time when employees request off **got my company off paper and excel and into technology.**” – Metropolitan Homecare Way

“Our previous payroll vendor made errors when submitting our taxes. **When we moved to ADP - they helped us clear up the mistake.** Because of ADP’s size, they had the IRS on the phone and issues resolved within a day.” – Golden Touch Homecare

“We love our service rep! Anytime I have a question or want to bounce an idea off of him for payroll processing I can either call or use the chat feature. **This has helped me on multiple occasions.**” – Sincere Care LLC

“We were using a 3rd party for i9 submissions and our old payroll vendor charged us for New Hire Reporting. Having this all in ADP’s system gave us the peace of mind of **being compliant while saving \$\$.**” – TCNY Homecare

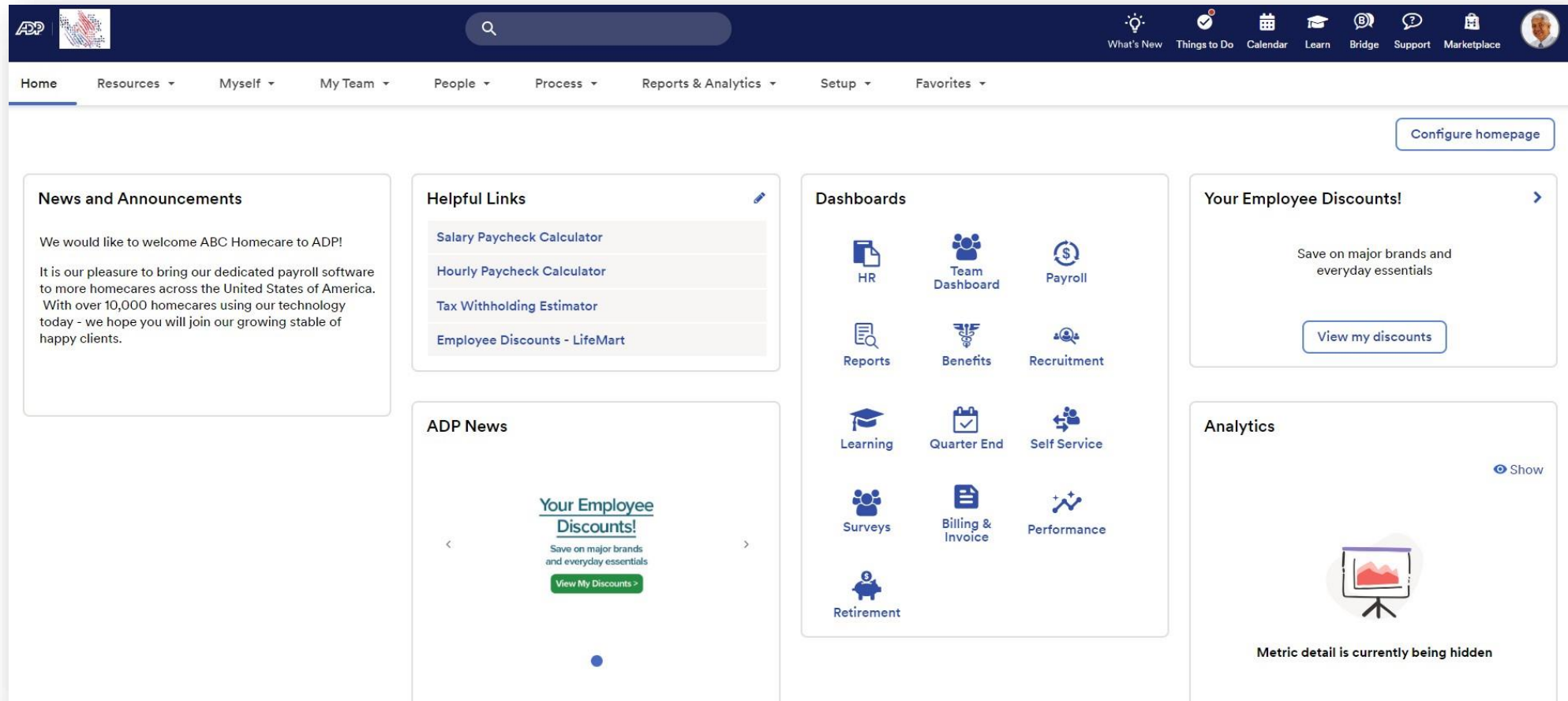
ADP's WorkforceNow Homepage



The dashboard for an ADP customer is fully customizable with areas to add your own unique partners (integration links)

Each user received their own login allowing for complete audit and compliance

Having your data is half the battle – being able to make decisions off it is what is important (analytics from 1/5 American workers)





Q&A



Thanks for joining us!