

PRODUCT PULSE

March 2024

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- 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 March Release
- Caregiver Compliance
- Partner Highlight: Inflowcare
- Q&A

Welcome! Meet the Speakers



Alex Mastrianni

Sr. Product Marketing Manager,
HHAeXchange



Amarelis Cortes

Sr. Enablement Specialist,
HHAeXchange



Abie Kolt

CEO,
Inflowcare



What's New

*March Product Release
& New Knowledge Base*



March Product Release

Facilitate a faster billing process when adjusting claims in bulk.

Adjust All Claims ✕

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

Submission Type *

TRN Number *

Place updated visit on hold

Manual Hold Reason *

Cancel Save

DOB: 04/17/1946

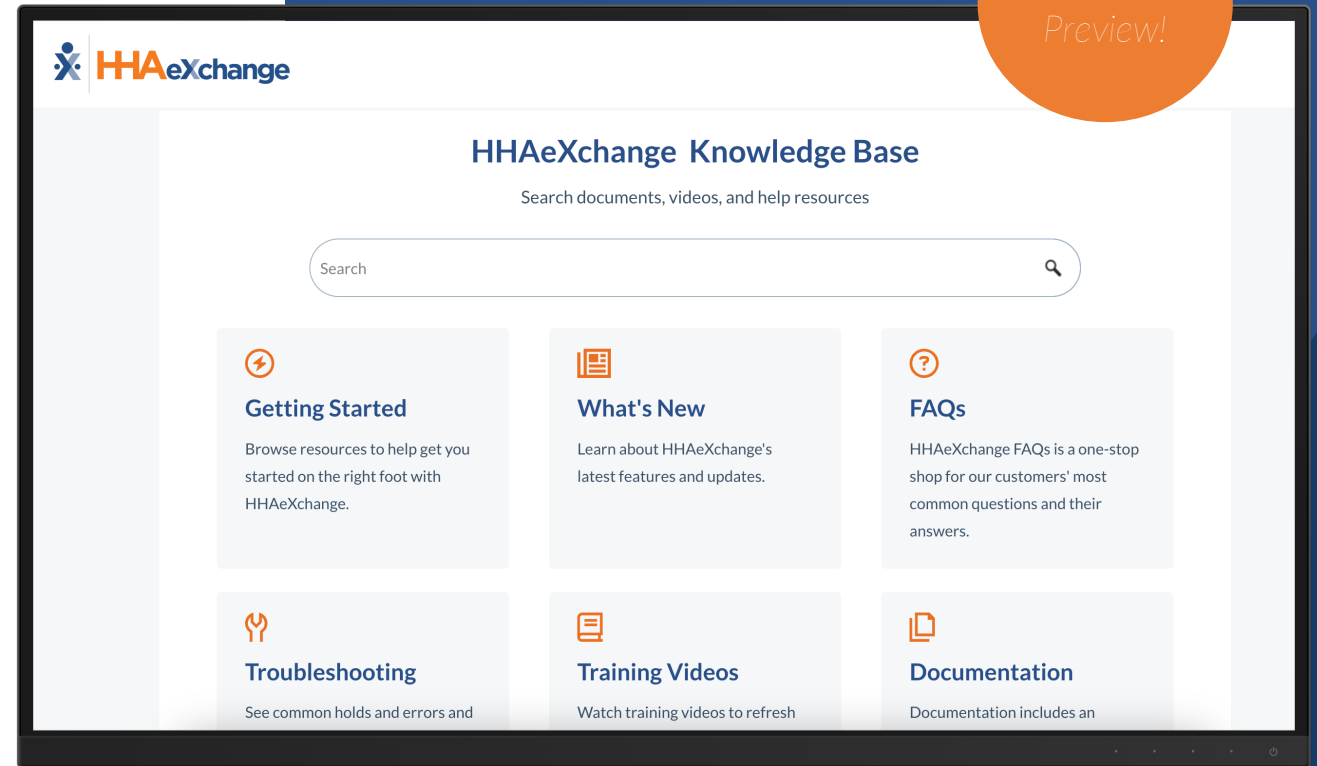


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Product Spotlight

Caregiver Compliance

Caregiver Compliance with Confidence



1

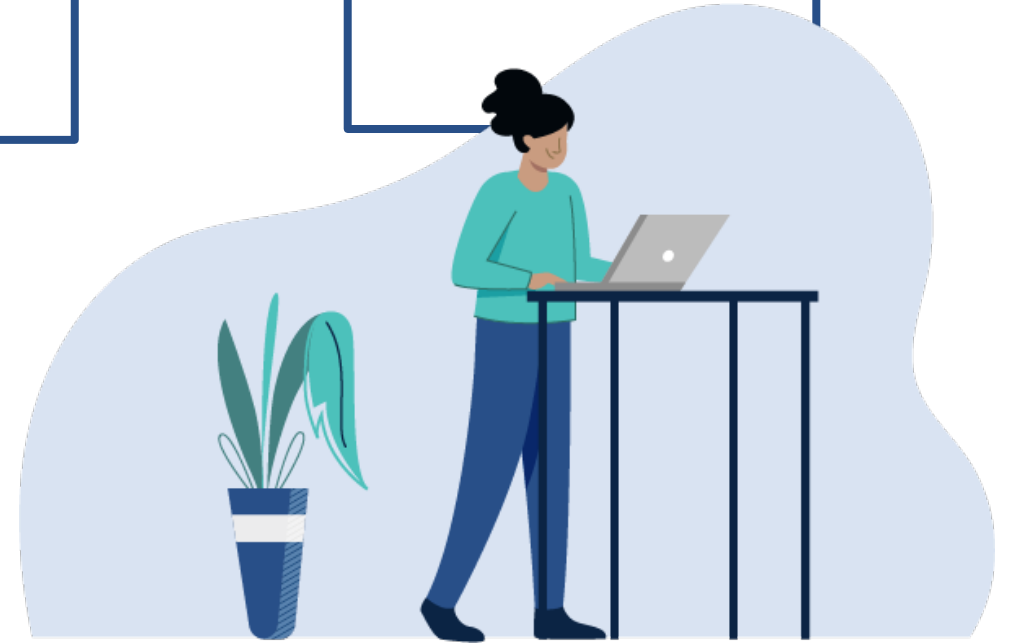
Customizing your compliance setup and automating reminders

2

Troubleshooting caregiver compliance

3

Staying ahead of expirations with reporting



Starting Off on the Right Foot

Admin > Compliance Setup > Item Manager



Compliance Item Manager Enterprise 24.2.1 NPRODWEB6 (Chrome/122.0.0.0) Chrome 122 (Doc Chrome 122) 3/14 10:44 ES

Criminal Background Training Schools Compliance Fields Medicals/Other Compliance

Criminal Background Check Status [Add](#)

Page 1 of 3 | [Next](#) [Last](#)

Results	Active	Compliant
Cleared	Yes	Yes
Pending Results	Yes	No
Submitted	Yes	No
Eligible	Yes	Yes
Not Eligible	Yes	No
Pass	No	Yes
Fail	No	No
Pending	No	Yes
Jail	Yes	No
Accepted	Yes	Yes
Passed (Anthony)	Yes	Yes
Failed (Anthony)	No	Yes
Submitted (Anthony)	Yes	Yes
Rejected (Anthony)	No	Yes
Re-Submitted (Anthony)	Yes	Yes
Failed (Anthony)_1	Yes	No
Rejected (Anthony)_1	Yes	No
passed	Yes	Yes
failed	Yes	No
submitted (GM)	Yes	No



Compliance Setup



HHAEExchange | Home | Patient | Caregiver | Visit | Action | Billing | Report | Dashboards | Admin | Notification (116) | Messages | ToDo's | Open Cases | Support Center | Sign Out | Welcome - Renzo Paulet (RNortheastSupport (Northeast Homecare Services) (ID# 744 | APP2)

Enterprise 24.2.1 NPRODWEB7 (Chrome/122.0.0.0) Chrome 122 (Doc Chrome 122) 3/14 10:45 ES

Compliance Setup (Test)

General | I-9 Requirements | Criminal Background | Training Schools | Compliance Fields | Medicals/Other Compliance

Setup Details [History](#)

* Setup Name:

Status:

Office(s): Allentown (Jeff's Office, Thomas's Office, Tucker's Office),Brightwood (Johnny's, Jonathan's, Joseph's, Paula Compliance Test),Brooklyn (Bay Ridge, Boro Park Office, GG Test, Ginger Office, Michael Office, Midwood Office, Scott's Office),Downtown (Aja's Office, Andre, Aura's Office, DeadPool, Jose's Office, Josh Manbor's, Julio's Office, Kristoffer's Office, Malik's Office, Natesha's Office, Paul's Office, Roarke's Office, Sandra, Tate's Office, Tico's, Victor's Office),Manhattan (Martha's Office, Minnesota Ent, Minnesota Ent Demo, Minnesota Reilly, MN Demo EVV, MN EVV Demo, Paolo's Office, Reilly Demo, Schedule Demo),Miami Beach (Thomas Ricks Office),North End (Althea's Office, Cris's Office, Enrique's Office, India's Office, Ricky's Office, Rob's Office, Roland Junior, Yvette's Office),Parkville (Chris Hancart),Queens (Akil's Office, Amber's Office, Andy's Office, Bill's Office, Brian Mc, Brian's Office, Carefinders POC, Christine's Office, Client's Practice, Colin's Office, Corona Office, Custom Field Setup, Demo Scheduling, Florina's Office, Frank's Office, HMK Care Plan Office, Ivana's Office, Jamie's Office, Jee's Office, Jim's Office, Joseph Wu's Office, Joshua's, Juan's Office, Kaitlin's Office, Kim's Office, Liraiza, Marcus Office, Minnesota, Minnesota EVV Demo, Moshe's Office, Nikhil's Office, Noah's Office, Noor's Office, Olcott's Office, Payroll Implementation, PCA Care Plan Office, PCA Test, Peter's Office, Quang's Office, Richard M's Office, RMTTest, secondary training, Shahana's Office, Third Train, Tom's, Trevor's Office, Virna's Office) [Edit](#)

Scheduling Validations [History](#)

I-9 Requirements: No Warning Validate

Criminal Background: No Warning Validate

Training School: No Warning Validate

Medicals/Other Compliance: No Warning Validate

Custom Compliance Fields: No Warning Validate

In-Service Requirements [Add](#)

No Records Found.

[Save](#) [Cancel](#)

Compliance Setup: I-9 Requirements



Support Center | Sign Out
Welcome - Renzo Paulet (RNortheastSupport)
(Northeast Homecare Services) (ID# 744 | APP2)

Enterprise 24.2.1 NPRODWEB7 (Chrome/122.0.0.0) Chrome 122 (Doc Chrome 122) 3/14 10:45 EST

Home Patient Caregiver Visit Action Billing Report Dashboards Admin

Notification 116 Messages 0 ToDo's 0 Open Cases 0

Compliance Setup (Test)

General **I-9 Requirements** Criminal Background Training Schools Compliance Fields Medicals/Other Compliance

Requirements [History](#)

Show: All Require: All

Require E-Verify Number: Require Verification:

Expiration/Re-Verification

Document	Expires	Requires Re-Verification	Active
US Passport or Passport Card [1-A]	Yes		Yes
Perm. Resident Card (Form I-551) [2-A]	No		Yes
Foreign Passport with I-551 [3-A]	No		Yes
Employment Authorization Document (Form I-766) [4-A]	No		Yes
Foreign Passport with I-94 or I-94A [5-A]	No		Yes
Passport from FSM or RMI with I-94 or I-94A [6-A]	No		Yes
Driver's License [1-B]	Yes		Yes
ID Card [2-B]	No		Yes
School ID [3-B]	No		Yes
Voter's Registration Card [4-B]	No	No	Yes
US Military Card [5-B]	No	No	Yes
Military Dependents ID Card [6-B]	No	No	Yes
US Coast Guard Card [7-B]	No	No	Yes
Native American Tribal Document [8-B]	No	No	Yes
Canadian Driver's License [9-B]	No	No	Yes
Alien Resident Card [10-B]	No	No	Yes
Other [11-B]	No	No	Yes
Alien Registration Receipt	No	No	Yes

HHAEExchange - Edit I-9 Requirement

I-9 Requirement [History](#)

I-9 Document: US Passport or Passport Card [1-A]

Status: Active

Expires: Yes No

Requires Re-Verification: Yes No

Save Cancel

Save Cancel



Automate Reminders



Compliance Setup (Test) Enterprise 24.2.1 NPRODUCTION (Chrome/122.0.0.0) Chrome 122 (Dev Chrome 122) 3/14 10:43 EST

General I-9 Requirements Criminal Background Training Schools Compliance Fields **Medicals/Other Compliance**

Compliance Items Add

Item	Active	Type
Annual Health Assessment	Yes	Me
Chest X-Ray	Yes	Me
Pre-Employment Physical	Yes	Me
COVID-19 Vaccination (Dose 1)	Yes	Me
Drug Screening	Yes	Me
COVID-19 Booster	Yes	Me

HHAEExchange - Edit Compliance Item

Compliance Item History

* Name: Pre-Employment Physical

Status: Active

* Require: Yes No

* Disciplines: [Multiple...]

Result	Accepted Selection	
Completed	<input checked="" type="checkbox"/>	H
Not Completed	<input type="checkbox"/>	H
	<input type="checkbox"/>	X

Generates Upon	After	Other Comp.	Result	
Hire Date	Immediately			✎ ✖

Save Cancel



Automate Reminders



The screenshot shows a software interface for editing a compliance item. The main dialog is titled "HHAeXchange - Edit Compliance Item" and has a "Name" field set to "Annual Health Assessment". A smaller, secondary dialog titled "HHAeXchange - Generates Upon (Annual Health Assessment)" is open in the foreground, showing configuration options for when the item generates. The "Event" is set to "Other Compliance Result", "After" is "Pre-Employment Physical", and "Saved with Result" is "Completed". The "Timeline" is set to "Days After Event" with a value of "1" entered in a text box. There are "Save" and "Cancel" buttons at the bottom of both dialog boxes.

Event	After	Saved with Result	Timeline
Other Compliance Result	Pre-Employment Physical	Completed	1 Days After Event

Troubleshooting Caregiver Compliance



Home Patient Caregiver Visit Action Billing Report Dashboards Admin

Notification ¹¹⁶ Messages ⁰ ToDo's ⁰ Open Cases ⁰

[Support Center](#) [Sign Out](#)
 Welcome - Renzo Paulet (RNortheastSupport)
 (Northeast Homecare Services) (ID# 744 | APP2)

Enterprise 24.02.01 NPRODWEB3 : 443 chrome 122 (Doc Chrome 122) 3/14 10:50 EST

Caregiver Info

- Profile
- Compliance
- Calendar
- Visits
- In Service
- Rates
- Notes
- Preferences
- Absence/Restriction
- Availability
- Payroll Info
- Expenses
- Pay Check
- Patient Hx
- Others
- Document Management

Caregiver Info Active

Name: Paulet Renzo Team: Address: XXX XXX	Caregiver Code: REN-2180 Provider: Northeast Homecare Services Languages:	Office: Payroll Implementation Phone: DOB: XX/XX/XXXX ⓘ
		Availability Updated: 7/23/2019 Caregiver Hours: H: 24:00 ⓘ V: 0

General Requirements ✓
Medicals/Other Requirements ✗
Verification

Hire Date ✓ [History](#)

* Hire Date:

Discipline	Status	Compliance Rules	Compliance History
PCA	Not Compliant ✗	Compliance Rules	History
HHA	Not Compliant ✗	Compliance Rules	History

Medicals ✗

Add

Pending Medicals ● All Medicals ○

Medical Name	Status	Results	Due Date	Date Performed	Required	Notes	Documents	Delete
Annual Health Assessment	Pending		03/14/2025		Yes		📎	✗
Chest X-Ray	Pending		03/31/2024		Yes		📎	✗
COVID-19 Vaccination (Dose 1)	Overdue		03/01/2024		Yes		📎	✗

Other Compliance ✓

Add

Pending Evaluations ● All Evaluations ○

Compliance Name	Status	Results	Due Date	Date Performed	Required	Notes	Documents	Delete
No Records Found.								

Search

First Name:

Last Name:

Caregiver Code:

➤ Troubleshooting Caregiver Compliance



HHAExchange - Compliance Check

General Requirements

Hire Date

- Compliant

I-9 Requirements

- Compliant

Criminal Background

- Compliance not required for Criminal Background.

Medicals

COVID-19 Vaccination (Dose 1)

- COVID-19 Vaccination (Dose 1) is overdue.

Other Compliance

- Compliance not required for Other Compliance.

In-Service

Close

Updating Medicals & Automation in Action



HHAeXchange Home Patient Caregiver Visit Action Billing Report Dashboards Admin

Notification 116 Messages 0 To Do's 0 Open Cases 0

Support Center Sign Out
Welcome - Renzo Paulet (RNortheastSupport)
(Northeast Homecare Services) (ID# 744 | APP2)

Enterprise 24.02.01 NPRODWEB3 : 443 chrome 122 (Doc Chrome 122) 3/14 10:50 EST

Caregiver Info

Caregiver Info Active

Name: Paulet Renzo Caregiver Code: REN-2180 Office: Payroll Implementation
 Team: Provider: Northeast Homecare Services Phone:
 Address: XXX Languages: DOB: XX/XX/XXXX ⓘ
 XXX

Availability Updated: 7/23/2019
 Caregiver Hours: H: 24:00 ⓘ
 V: 0

General Requirements ✓ **Medicals/Other Requirements ✓** Verification ↻ 🗑️

Hire Date ✓ [History](#)

* Hire Date: 📅

Discipline	Status	Compliance Rules	Compliance History
PCA	Compliant ✓	Compliance Rules	History
HHA	Compliant ✓	Compliance Rules	History

Medicals ✓ [Add](#)

Pending Medicals ● All Medicals ○

Medical Name	Status	Results	Due Date	Date Performed	Required	Notes	Documents	Delete
Annual Health Assessment	Pending		03/14/2025		Yes		📎	✖
COVID-19 Booster	Pending		09/12/2024		Yes		📎	✖

Other Compliance ✓ [Add](#)

Pending Evaluations ● All Evaluations ○

Compliance Name	Status	Results	Due Date	Date Performed	Required	Notes	Documents	Delete
No Records Found.								

Search

First Name:
 Last Name:
 Caregiver Code:

◀ Go ▶

Stay Ahead of Expirations with Reports

Report > Caregiver > Compliance



- Caregiver Compliance General (V2)
- Caregiver Non-Compliance History
- Deleted Medicals / Other Compliance Items
- Flu Vaccine Report
- I-9 Expiry Report
- In Service Attendance Sheet
- In Service Due
- In Service Certificate
- Medical / Other Compliance Item Due Report
- Missing Medicals /Other Compliance Items

The screenshot displays the HHAExchange web interface. The top navigation bar includes 'Home', 'Patient', 'Caregiver', 'Visit', 'Action', 'Billing', 'Report', 'Dashboards', and 'Admin'. The main content area is titled 'Caregiver Info' and shows details for 'Paulet Renzo', including 'Name', 'Team', and 'Address'. A search box is located below the profile information. A dropdown menu is open over the 'Report' tab, listing various reporting tools such as 'Reporting Tool (2.0)', 'Admin', 'AR', 'Billing', 'Caregiver', 'Compliance', 'Events', 'Exception Reports', 'Month End Reports (V4)', 'Other Reports', 'Patients', 'Payroll', 'Referral Patient Reports', 'Sales', 'Time and Attendance', 'Provider Management', 'Visits', 'Employees Worked', 'HHA/PCA State Registry', 'In Service by Quarter', 'In Service Due (HRA)', 'In Service Report', 'In Services by Caregiver (Ent)', 'Languages Spoken By Caregiver', 'List of Applicants/Caregivers', 'List of Caregivers (Ent)', 'List of Hired Trainees', 'On Call Report', 'Payroll Hours by Caregiver Detail', 'Payroll Hours By Caregiver Summary', 'Payroll Monthly Income', 'Rate Expiry Report', 'Restricted/Declined Caregivers', 'Temporary Caregivers Report', 'Travel Time Expense', and 'Weekly Average Payroll'. The 'Compliance' section is highlighted, and a sub-menu is visible showing options like 'Caregiver Compliance General (V2)', 'Caregiver Non-Compliance History', 'Criminal Background Check', 'Deleted Medicals / Other Compliance Items', 'Flu Vaccine Report', 'I-9 Expiry Report', 'In Service Attendance Sheet', 'In Service Due', 'In-Service Certificate', 'Medicals/Other Compliance Item Due Report', and 'Missing Medicals/Other Compliance Items'.

Connect with Caregivers On-the-Go

Office Setup



Mobile

Mobile Fixed Visit Verification: ⓘ

UnBalanced Tolerance: Hours Min ⓘ

View Open Cases ⓘ

Open Case Settings: Request and Accept Open Cases ⓘ
 Acceptance Request Limit ⓘ

Enable Mobile App Offline Mode: ⓘ

Mobile Offline Sync Period: ⓘ

Enable Alternate EVV Workflow: ⓘ

Verification Order: ⓘ

Require Timesheet if EVV linked to Visit w/o verification: ⓘ

Time in hours that a Caregiver can update Duties after a Patient Visit: ⓘ

Extend the visit end time to include time to enter duties: ⓘ

Allow Caregiver to select the visit as a Community visit: ⓘ

Enable Unscheduled Visit Service Code Selection: ⓘ

Display Other Duties when there are POC Duties assigned: ⓘ

Allow Caregivers to Log Duties after Clock In: ⓘ

Enable Service Selection: ⓘ

Patient Confirmation of Service Received: ⓘ

*** Mobile GPS Visit Verification:** **Tolerance Range (ft):** ⓘ

Mobile Beacon Verification: ⓘ

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

Allow Caregivers to modify Confirmed Time via the Mobile App: ⓘ

Allow Caregivers to enter Time via the Mobile App when there is no preexisting EVV: ⓘ

Allow the Caregiver to view compliance information via the Mobile App: ⓘ

Display Medical Items: days before due date

Display Other Items: days before due date

Display In-Service Items: days before scheduled class date

Enable the I'm Awake button for midnight shifts: ⓘ

Allow Users and Caregivers to use the Chat Service: ⓘ

Enable Mobile App Biometric Two Factor Authentication: ⓘ

Enable Unscheduled Visit POC Selection: ⓘ

Display Other Duties when there are no POC Duties assigned: ⓘ

Patient Confirmation of Visit Times: ⓘ

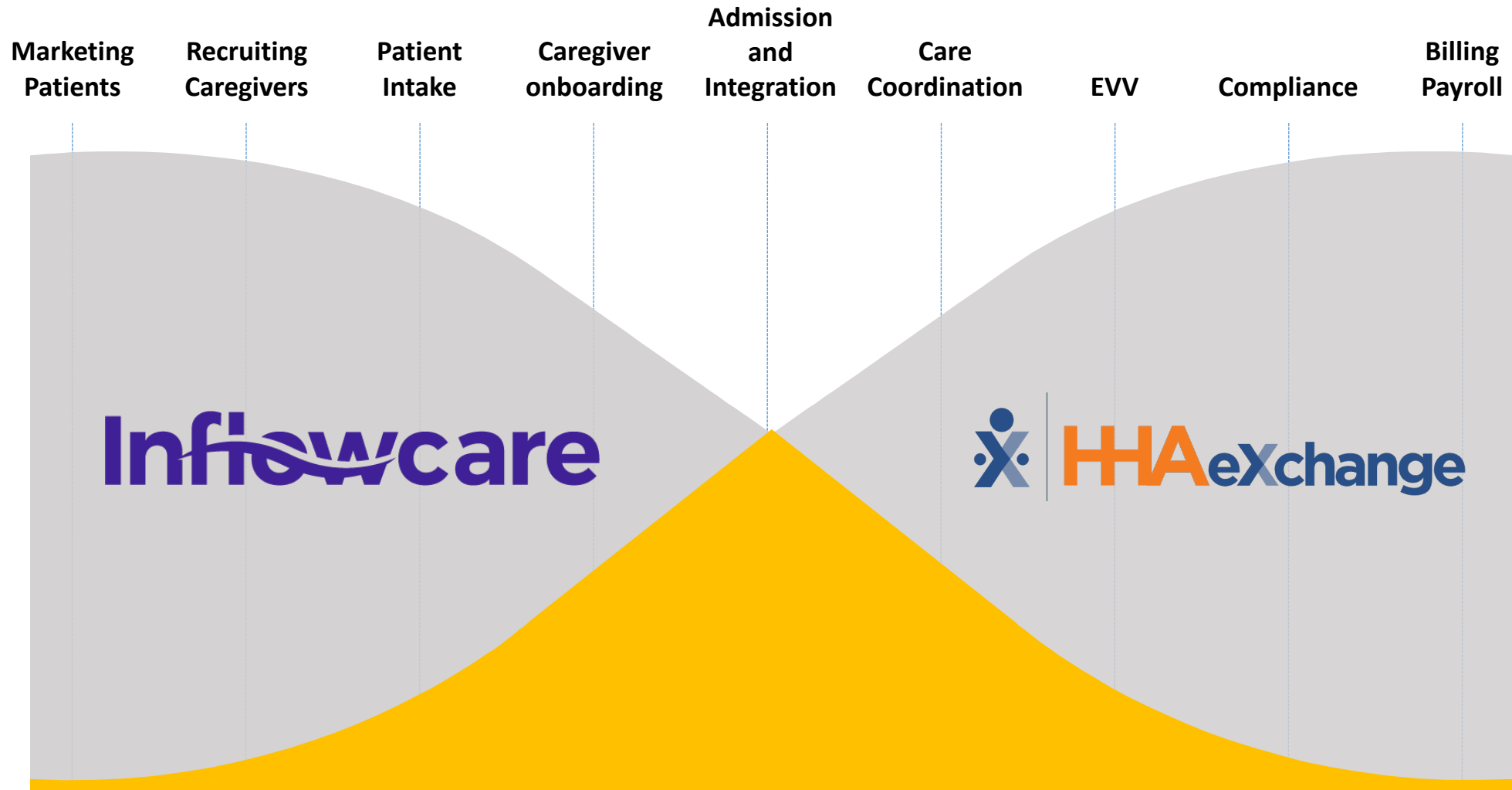


Partner Highlight

Inflowcare



Partnership & Integration





Strategies to be Compliant from the Start



Compliance begins with onboarding

- Classify new hires appropriately
- Inspect all onboarding paperwork and documents for accuracy
 - Some agencies have multiple levels of review
- Provide handbook and other disclosures
- Background checks
- I-9
- Preemployment physicals
- Payroll and tax setup
- State-specific requirements



Helpful Resources



Tools to Assist with Compliance

- Onboarding software
- Task management
- Reporting

Resources

- Mobile Health
- NY Best
- Inflowcare



Hamaspik HomeCare
Legendary Support, Extraordinary Care

“Everything is working so smoothly with Inflowcare. The turnaround time to hire caregivers has significantly improved, and I can track it all in the reports. Seeing the progress from applicant creation to hiring is just so satisfying!”

Devora Nass
HR Supervisor, Hamaspik HomeCare



Inflowcare's Caregiver Onboarding Module – Staff Track



The Caregiver Onboarding Module provides a clean, orderly workflow for hiring caregivers

Each step in the onboarding process can be communicated electronically to increase efficiency and onboard caregivers quickly

Staff ID #98800 Abie Demo

Application Status: Pending Documents

Office Location: Brooklyn

Lead Source: Walk-In

HR Available Start Date: 04/01/2024

Progress: 43%

Demographics: Completed

Work History: Completed

Education: Completed

Government Forms: Awaiting Review

Skill/Availability: Awaiting Review

E-Sign: Awaiting Submission

Documents: Awaiting Submission

Personal Information:

First Name	Middle Name
Abie	--
Last Name	Email
Demo	--
Email 2	Email 3
--	--
Phone 1 Home	Phone 2
(845) 151-5151	--

Assignees:

- HR Representative: H
- CM Representative: --

Follow-Up:

Follow-Up Date: 03/27/2024

Follow-Up Time: --

Follow-Up Note: Check-in with applicant on progress.

Notes:

Follow-Up Notes: Abie Conference - 03/20/2024 09:24 AM. Check-in with applicant on progress.



Q&A



Thanks for joining us!