PRODUCT ✖ PULSE

May 2024

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: May Product Release & New Knowledge Base is LIVE**

> **Tips for Better Patient Management**

> **Partner Highlight: Bolt Healthcare**

> **Q&A**

Welcome! Meet the Speakers

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HHAeXchange

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Sr. Enablement Specialist,
HHAeXchange

Avi Cohen

Director of Operations &
Product Management,
Bolt Healthcare

What's New

May Release & Knowledge Base News

May Product Release

- **New Mobile App Languages: Cantonese & Mandarin**
- **New IVR Languages: Ukrainian & Urdu**
- **Blended Overtime**
- **Services Portal Management Enhancements**
- **New Knowledge Base Platform**

Expenses Added to Blended Overtime

Apply expenses to Blended Overtime in the Payroll Module

Services Portal Enhancements

Easily create and manage communications to Services Portal Users with the Announcements Feature & better understand a Services Portal User Experience with the Impersonate Feature.
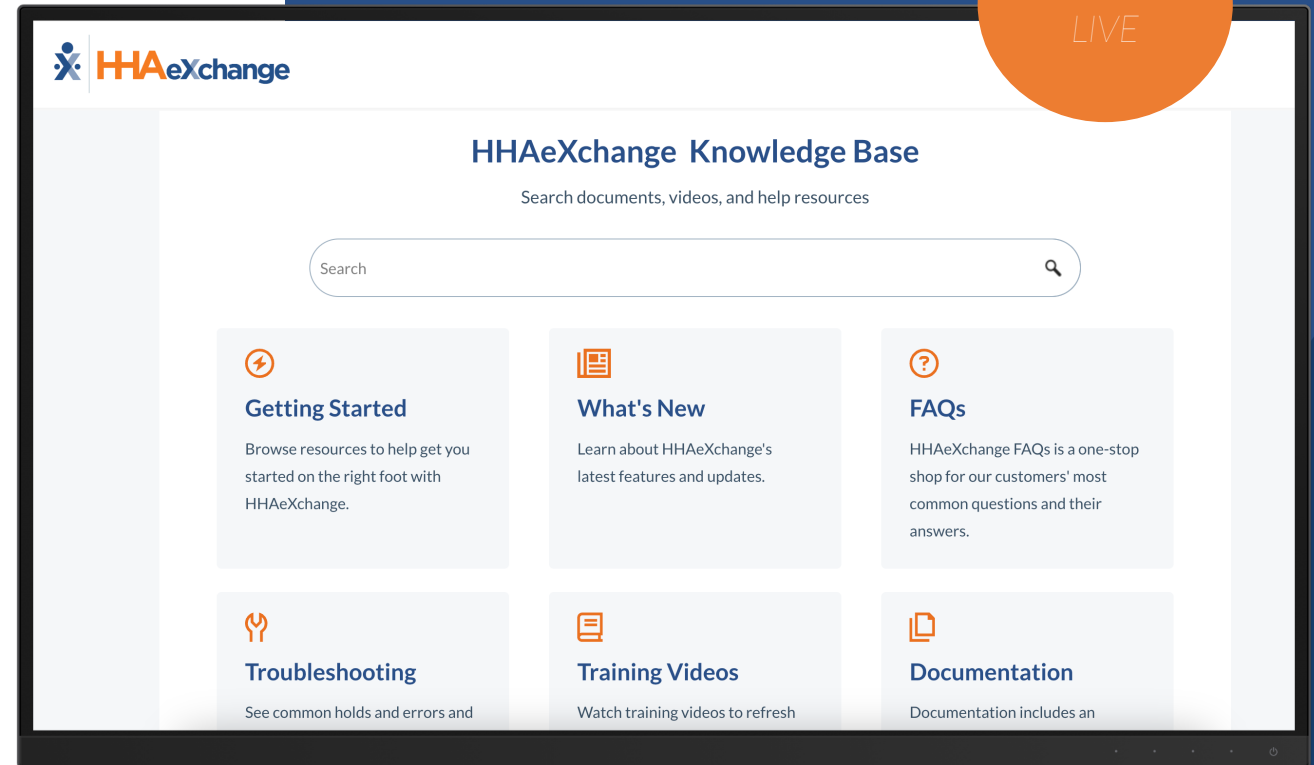
The new & improved HHAeXchange Knowledge Base

- Quickly find the content you need

- Diversified content formats, including more videos

- Refreshed Top 100 FAQ Articles

- New! Trending Topics

Check it out today:
knowledge.hhaexchange.com

Product Spotlight
Better Patient Management in HHAeXchange

Mastering Patient Management in HHAeXchange

1 Authorizations

2 Plan of Care Management

3 All Things Master Week

4 Automating Patient Office Moves

Authorizations

Visibility into Valid Authorizations At-A-Glance

Patient Info - Active

Name: Lopez Richard	**Admission ID:** REN-7897654654322795	**Patient ID:**
DOB: XX/XX/XXXX	**Primary Alt. Patient ID:**	**Home Phone:** 929-200-4503
Coordinators: Jason Gomez	**Office:** Payroll Implementation	**Languages:** English

Contract: Chase Health, Mary Health
Address: XXX, XXX, BROOKLYN, NY, 11211

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
Chase Health	12345	05/01/2024	05/31/2040	HHA	HHA Hourly	N/A	Hourly	Weekly	20.00								0	
Chase Health	12345678	01/01/2021	01/01/2023	HHA	HHA Daily	N/A	Daily	Daily		0	24.00	24.00	24.00	24.00	0	0	0	

Calendar   Rollover History   Legend

Month: May   **Year:** 2024   Search   ◀ ▶   Create Visit   Print

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29 **S: 0900-1200** V: B: **N** Poole Brittany ✖	30 **S: 0900-1200** V: B: **N** Poole Brittany **T** ✖	31	1

Plan of Care Management

New POC

Patient Name: Camacho Maria   **Admission ID:** 7897654654322498   ***Start Date:** [_____] 📅   **Stop Date:** [_____] 📅

Shift: [All ▾]

[Save] [Close]

Category	Task #	Duty	Minutes	As Requested	Times a Week (Min) - (Max)		Instruction	Days Of Week
Personal Care	101	Bathing	[____]	☐	[7] -	[7]	[_____]	☑S ☑S ☑M ☑T ☑W ☑T ☑F
Personal Care	102	Cleaning	[____]	☐	[__] -	[__]	[_____]	☐S ☐S ☐M ☐T ☐W ☐T ☐F
Personal Care	103	Cooking	[____]	☑	[1] -	[7]	[_____]	☐S ☐S ☐M ☐T ☐W ☐T ☐F
Personal Care	104	Laundry	[____]	☐	[__] -	[__]	[_____]	☐S ☐S ☐M ☐T ☐W ☐T ☐F
Personal Care	105	Make-up	[____]	☐	[__] -	[__]	[_____]	☐S ☐S ☐M ☐T ☐W ☐T ☐F
Advanced Personal Care	106	Driving	[____]	☐	[__] -	[__]	[_____]	☐S ☐S ☐M ☐T ☐W ☐T ☐F

POC Note : [_____]

[Save] [Close]

POC Compliance Report

Master Week

Editing the Master Week vs. Calendar

Scenario	Master Week	Calendar
Caregiver is on vacation for a week		✅
Caregiver is reassigned	✅	
The authorization changes	✅	
Patient changes contracts	✅	
Schedule modification for two weeks		✅

Stay Ahead of Expiring Authorizations & Expiring Master Weeks

Worklists

Expiring Caregiver Medical/Other Compliance (0) | **Expiring Authorization (0)** | Unstaffed Visits (0) | Expiring Master Week (0) | Expiring Certification Period (0)

Search Expiring Authorization

Office
DEVOTION HC ▼

Coordinator
All ▼

Contract
All ▼

Assignee
All ▼

Status
Open ▼

Expiring
Within 30 days ▼

+ Advanced Filters

[Search] [Reset]

Expiring Authorization ⓘ

Display : All ▼   Bulk Actions ▾

☐	Patient ⇕	Auth Number ⇕	Expiration Date ⇕	Contract ⇕	Reported On ⇕	Last Note Entered	Assignee ⇕	Status ⇕	Actions
☐	**Earl Monroe** Admission ID: DVT-900010	9674576	06/14/2023	UNITED NJ	05/15/2023			Open	•••

Patient Office Move Automation

Automate patient moves from one office to another:

- Improve operational efficiency
- Eliminate HHAeXchange Support Team intervention
- Enable faster and improved service for patients

Partner Highlight

Bolt Healthcare

Home care agencies encounter several operational challenges

Connectivity and Communication: Effective communication within the patient's care circle is crucial but challenging due to the dispersed nature of home care services.

Paperwork Management: Extensive documentation required in home care can lead to inefficiencies and potential for miscommunication.

Cost Management: Managing billing and payroll is intricate due to varying work shifts and locations of caregivers.

Efficiency as a Cornerstone

Efficiency in home care is crucial from the start. It enables effective use of resources and streamlined workflows, leading to better care planning and resource allocation.

BOLT.HEALTHCARE®

Agencies face several operational challenges:

Inefficient Scheduling:

Struggle with coordinating caregiver schedules, leading to overlaps and gaps in care.

Communication Barriers:

Experience difficulties in maintaining clear communication between caregivers, patients, and administrative staff.

Data Management Issues:

Encountere challenges in handling patient information accurately, affecting service quality.

Slow Onboarding Process:

Face extended timeframes in hiring and onboarding new caregivers, impacting their ability to meet patient needs quickly.

Limited Marketing Efficiency:

Marketing efforts hampered by a lack of integrated tools, affecting client outreach and engagement.

Technology Maximizes Agency Productivity

By harnessing advanced digital tools, agencies can optimize resource allocation, enhance service delivery, and achieve higher efficiency.

This strategic integration of technology ensures that every decision is informed by accurate, real-time data, leading to more effective management and improved patient outcomes.

Q&A

Thanks for joining us!