

PRODUCT PULSE

May 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: May Product Release & New Knowledge Base is LIVE
- Tips for Better Patient Management
- Partner Highlight: Bolt Healthcare
- Q&A

>Welcome! Meet the Speakers



Alex Mastrianni

Sr. Product Marketing Manager,
HHAeXchange



Amarelis Cortes

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

Reference Table Management Enterprise 24.05.01 TELXSWEB01 (Chrome/124.0.0.0) chrome:124.0.0.0 (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	Yes	N/A	N/A	No	Active
Mile	Yes	N/A	N/A	Yes	N/A	N/A	No	Active
Mileage	No	N/A	N/A	Yes	N/A	N/A	No	Active
SN Expense	Yes	N/A	N/A	Yes	N/A	N/A	No	Active
Supplies	No	N/A	N/A	Yes	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: ⓘ

Save Cancel



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 screenshot displays the 'Services Portal' interface. The top navigation bar includes 'Services Portal', 'Visits', 'Reports', and 'Admin'. A dropdown menu is open under 'Admin', showing 'Announcements', 'Application Settings', and 'User Management'. The main content area is titled 'Announcements' and features a search bar and an 'Add Announcement' button. Below this is a table of announcements.

Dates Active	Recipients	Subject	Message	Status	Actions
03/06/2024 5:33 AM - 03/14/2024 1:33 PM	CDS Employers, CDS Employees	Labor Day Holiday	Please be advised that our offices will be closed on Labor Day, Monday, September 5th. Emergency staff will be on call. Feel free to contact our offices via contact@nehomecare.com or (555) 555-5555 if any questions or concerns. Thank you.	Scheduled	...
02/21/2024 3:33 PM	Agency Admins, Staff	Upcoming Summer Schedules	Attached is the upcoming Caregiver Summer Schedules.	Active	...
01/30/2024 1:33 AM - 02/14/2024 5:33 AM	All	Memorial Day Holiday	Please be advised that our offices will be closed on Memorial Day, Monday, May 30th. Emergency staff will be on call. Feel free to contact our offices via contact@nehomecare.com or (555) 555-5555 if any questions or concerns. Thank you.	Inactive	...

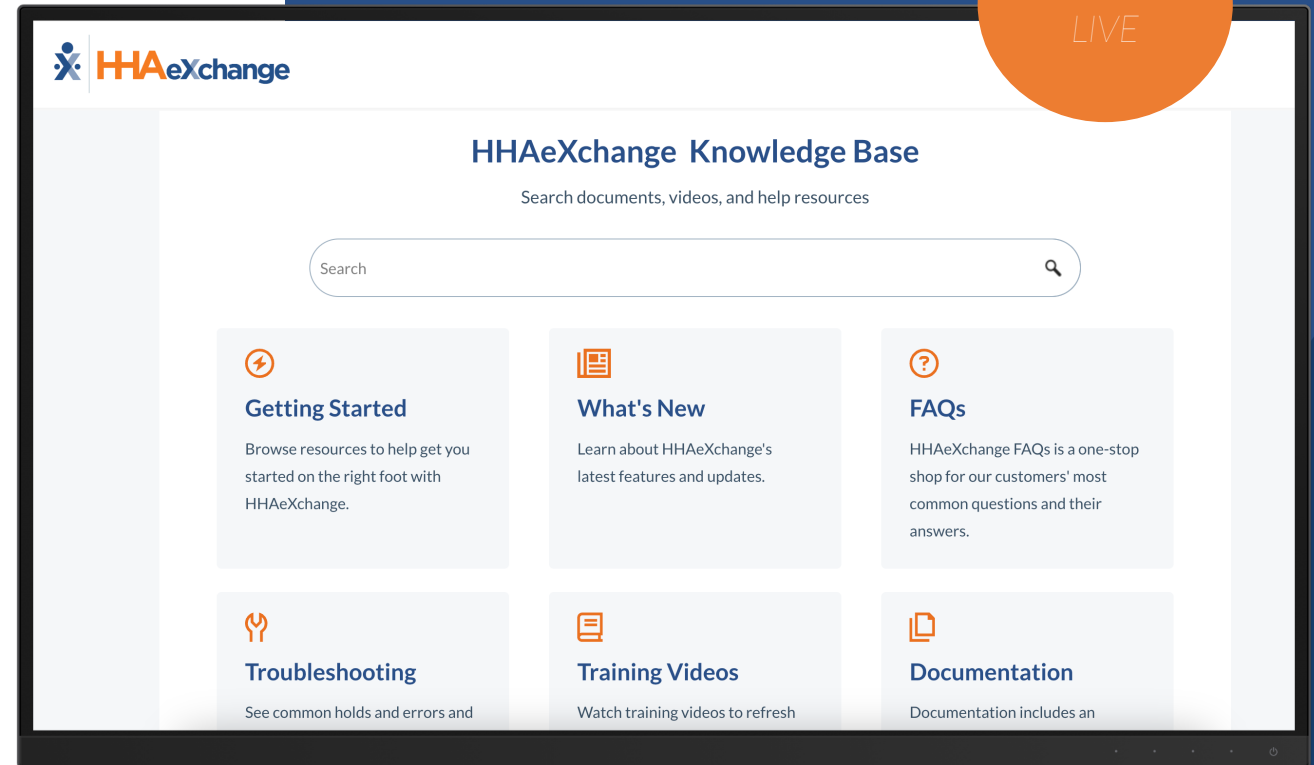


The new & improved HHAeXchange Knowledge Base

- 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





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



HHAEExchange - Patient Authorization

Authorization ⓘ

* **Contract:** --Select-- ⓘ * **Discipline:** --Select-- ⓘ

* **Authorization Number:** ⓘ **Service Code:** --Select-- ⓘ

* **From Date:** ⓘ * **To Date:** ⓘ

Type: **Display:** Hours Units ⓘ

Period: Daily ⓘ **Max Units for Entire Auth:** ⓘ (Enter 0 for unlimited) ⓘ

Specific Date Type: ⓘ

Sun: Mon: Tue: Wed: Thu: Fri: Sat: ⓘ

Document: ⓘ

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

Notes: (500 Character Limit)

Save **Cancel**

- If the authorization number is not available, enter TEMP
- Authorization will be specified in units. 1 hour is 1 unit. 30 minutes is 0.50 units.

HHAEExchange - Patient Authorization

Type: **Display:** Hours Units ⓘ

Period: Daily ⓘ **Max Units for Entire Auth:** ⓘ (Enter 0 for unlimited) ⓘ

Specific Date Type: ⓘ

Sun: 24 Mon: 24 Tue: 24 Wed: 24 Thu: 24 Fri: 24 Sat: 24 ⓘ

Blackout Dates ⓘ **Add**

No Blackout Date Entered.

Document: ⓘ

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

Billing Diagnosis Code(s):

Code	Description	Admit.	Primary	Add
------	-------------	--------	---------	-----

Notes: (500 Character Limit)

Save **Cancel**

- If the authorization number is not available, enter TEMP
- Authorization will be specified in units. 1 hour is 1 unit. 30 minutes is 0.50 units.



Visibility into Valid Authorizations At-A-Glance



Patient Info - Active

Name: Lopez Richard DOB: XX/XX/XXXX	Admission ID: REN-7897654654322795 Primary Alt. Patient ID:	Patient ID: Home Phone: 929-200-4503	Contract: Chase Health, Mary Health Address: XXX, XXX, BROOKLYN, NY, 11211
Coordinators: Jason Gomez	Office: Payroll Implementation	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	
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: Year: ◀ ▶



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	28	29	30	1	2	3
	5	6	7	8	9	10
	12	13	14	15	16	17
	19	20	21	22	23	24
	26	27	28	29	30	31
			S: 0900-1200 V: N B: N Poole Brittany <input type="button" value="X"/>		S: 0900-1200 V: N B: N Poole Brittany <input type="button" value="X"/>	



Plan of Care Management



New POC

Patient Name: Camacho Maria Admission ID: 7897654654322498 *Start Date:  Stop Date: 

Shift:

Category	Task Duty #	Minutes	As Requested	Times a Week (Min) - (Max)	Instruction	Days Of Week
Personal Care	101 Bathing	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="7"/> - <input type="text" value="7"/>		<input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F
Personal Care	102 Cleaning	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> - <input type="text"/>		<input type="checkbox"/> S <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> T <input type="checkbox"/> F
Personal Care	103 Cooking	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/> - <input type="text" value="7"/>		<input type="checkbox"/> S <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> T <input type="checkbox"/> F
Personal Care	104 Laundry	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> - <input type="text"/>		<input type="checkbox"/> S <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> T <input type="checkbox"/> F
Personal Care	105 Make-up	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> - <input type="text"/>		<input type="checkbox"/> S <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> T <input type="checkbox"/> F
Advanced Personal Care	106 Driving	<input type="text"/>	<input type="checkbox"/>	<input type="text"/> - <input type="text"/>		<input type="checkbox"/> S <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> T <input type="checkbox"/> F

POC Note :



POC Compliance Report



POC Compliance Report

Report Date: 5/17/2024

Office(s): Payroll Implementation	Contract(s): All	Coordinator(s): All
From Date: 5/4/2024	To Date: 5/10/2024	Exclude Other Duties: No
Caregiver: All	Patient: All	Report View: Summary

Admission ID	Patient Name	Week Date	Contract	POC Number	POC Task	POC Item	POC Min	POC Max	Missed Visits	Total Patient Completed	Total Patient Denied	Patient % Compliance
REN-7897654654322498	Camacho Maria	05/04/2024-05/10/2024	Chase Health	5150435	Bathing	POC	7	7	0	0	0	0.00%
REN-7897654654322498	Camacho Maria	05/04/2024-05/10/2024	Chase Health	5150435	Cleaning						0	0.00%
REN-7897654654322498	Camacho Maria	05/04/2024-05/10/2024	Chase Health	5150435	Cooking						0	0.00%
REN-7897654654322498	Camacho Maria	05/04/2024-05/10/2024	Chase Health	5150435	Driving						0	0.00%

136 Notification

[Billing](#) | [Report](#) | [Dashboards](#) | [Admin](#)

- Reporting Tool (2.0)
- Admin
- AR
- Billing
- Caregiver
- Compliance
- DOH
- Events
- Exception Reports
- Month End Reports (V4)
- Other Reports
- Patients
- Payroll
- Referral Patient Reports
- Sales
- Time and Attendance

- EN-7897654654322498
- Training Schools
- Duty Sheet By Visit Date
- Duty Sheet Compliance
- Exclusion List Report
- Patient With 3 Missed Visits
- Patients with 3 consecutive Unverified Visits
- POC Compliance by Category Summary
- POC Compliance V2**
- Restricted Caregivers
- Temporary Caregivers



Master Week



Patient Master Week

- General
- Contracts
- Referral Patient Info
- Profile
- Eligibility Check
- Authorizations/Orders
- Special Requests
- Master Week
- Calendar
- Visits
- POC
- Caregiver HX
- Others
- Rates
- Supplies
- Financial
- Vacation
- Family Portal
- Document Management
- Clinical
- Info
- Certification
- Med Profile
- MD Orders
- Interim Order
- Documentation
- Care Insights

Patient Info - Active

Name: Camacho Maria **Admission ID:** REN-7897654654322498 **Patient ID:** **Contract:** Chase Health, Mary Health
DOB: XX/XX/XXXX **Primary Alt. Patient ID:** **Home Phone:** 973-870-9656 **Address:** XXX, XXX, PASSAIC, NJ, 07055
Coordinators: Jason Gomez **Office:** Payroll Implementation **Languages:**

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
Mary Health	1234567898	01/01/2021	12/31/2100	PCA		N/A		Daily	24.00	24.00	24.00	24.00	24.00	24.00	24.00	24.00	0	
Chase Health	987654321	01/01/2021	12/31/2100	PCA		N/A		Daily	24.00	24.00	24.00	24.00	24.00	24.00	24.00	24.00	0	
Mary Health	1234567898	01/01/2021	12/31/2100	HHA		N/A		Daily	24.00	24.00	24.00	24.00	24.00	24.00	24.00	24.00	0	

Master Week

	Sunday Alt.	Monday Alt.	Tuesday Alt.	Wednesday Alt.	Thursday Alt.	Friday Alt.	Saturday Alt.
04/22/24 -	Hours: [] - [] Caregiver: [] Assi. ID: [] Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: Hourly Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0600 - 0700 Caregiver: REN-2271 Assi. ID: 101271 Pay Code: Non Payable POC: --Select-- Bill To: Chase Health H: 01 M: 00 Service Code: HHA Hourly Rate Type: Hourly Sec. Bill To: --Select-- H: 00 M: 00 Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: [] - [] Caregiver: [] Assi. ID: [] Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0600 - 0700 Caregiver: REN-2271 Assi. ID: 101271 Pay Code: Non Payable POC: --Select-- Bill To: Chase Health H: 01 M: 00 Service Code: HHA Hourly Rate Type: Hourly Sec. Bill To: --Select-- H: 00 M: 00 Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0600 - 0700 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: HHA Base POC: --Select-- Bill To: Chase Health H: 01 M: 00 Service Code: HHA Hourly Rate Type: Hourly Sec. Bill To: --Select-- H: 00 M: 00 Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: [] - [] Caregiver: [] Assi. ID: [] Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: [] - [] Caregiver: [] Assi. ID: [] Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>
02/08/22 -	Hours: [] - [] Caregiver: [] Assi. ID: [] Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0800 - 1200 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: 0800 M: 1200 Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0800 - 1200 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: 0800 M: 1200 Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0800 - 1200 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: 0800 M: 1200 Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0800 - 1200 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: 0800 M: 1200 Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0800 - 1200 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: 0800 M: 1200 Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>	Hours: 0800 - 1200 Caregiver: REN-2122 Assi. ID: 101122 Pay Code: --Select-- POC: --Select-- Bill To: --Select-- H: 0800 M: 1200 Service Code: --Select-- Rate Type: [] Sec. Bill To: --Select-- H: [00] M: [00] Service Code: --Select-- Rate Type: [] Include in Mileage: <input type="checkbox"/>

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](#)

<input type="checkbox"/>	Patient	Auth Number	Expiration Date	Contract	Reported On	Last Note Entered	Assignee	Status	Actions
<input type="checkbox"/>	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

Office Move ⓘ

* Destination Office:

Office Move History

Source Office	Destination Office	Requested Date	Requested By
No Records Found			

Office Move

Before moving Patient's Current office to Destination office, please check following rules:

- Timezone for Current office and Destination office should be same.
- Duty list setup for Current office and Destination office should be same.
- Payroll setup list for Current office and Destination office should be same.
- If UPR Patient, Current office and Destination office should have same service code.
- If Internal Patient, Current office and Destination office should be linked to same contracts.

Office Move ⓘ

* Destination Office:

Office Move History

Source Office	Destination Office	Requested Date	Requested By
No Records Found			

▼ New York

- ▼ NYC
- ▼ Queens

Payroll Implementation



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.

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:

Encounter 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!