

PRODUCT PULSE

October 2023 | Presented by Joey Hamilton, CSM at HHAeXchange

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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
- Highlights from the September and October Releases
- 7 Common Billing Holds (& How to Quickly Fix Them)
- Q&A

Welcome! Meet the Speakers



Alex Mastrianni

Senior Product Marketing
Manager, HHAeXchange



Joey Hamilton

Client Success Manager,
HHAeXchange



Product Release

What's New This Month

September & October Product Release



September

- **Financial**
 - Billing Process for Manually Entered Total Amounts
 - Rounding Rules Updates to Service Hours (UPR)
 - Condition Code Field in Rebilling
 - Limit Claims on Invoices per Invoice Type (UPR)
- **Workforce**
 - Digital Applicant Onboarding (DAO) Spanish Text Available

October

- **Data**
 - Report Modifications – Patient Activity Report, Claim Status Report, and New “Caregiver Code” Column now on several reports
- **Financial**
 - Billing Page Refresh
 - Service Code Field Changes in Invoiced Visit Search

Condition Code Field in Billing



For enhanced visibility into claim adjustments, the condition code field now displays in the claim adjustment window when resubmitting a claim.

Add Resubmit Claims E-Submission Batch

Claim Adjustment

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

Important: Claim Adjustment changes will bypass ALL billing validations. It is an override function. Make sure you have authorizations to cover any adjustment in Billed Adjustment Hours.

Visit Date 12/18/2020	Submission Type * Adjustment	Condition Code * Select ...
TRN Number * [Empty]	Update Single Claim	Condition Code * Select ... D0 - Change to service dates D1 - Change in charges D2 - Change in revenue codes/HCPSC - HIPPS D3 - Second or subsequent interim PPS bill - PPS inpatient hospital only D4 - Change in GROUPER input (diagnoses or procedures) - PPS inpatient hospital). D5 - Cancel-only to correct a Medicare beneficiary identifier or provider identification number D6 - Cancel-only to repay a duplicate payment or OIG overpayment (includes cancellation of an outpatient bill contain D7 - Change to make Medicare the secondary payer D8 - Change to make Medicare the primary payer D9 - Any other change E0 - Change in patient status
Start Time 12/18/2020 0300	End Time 12/18/2020 0400	
Billed Adj Hours ⓘ [Empty] (-) HHMM	TT Hours [Empty] HHMM	
Homecare Worker Name CG1 Harry	Employment Type PCA, HHA	

Cancel Save

Limit Claims on Invoices per Type (UPR)



Take the guesswork out of billing. While setting up payers, you can now set limits on the number of visits per invoice, creating a new efficient billing process – and making sure you're paid correctly.

Organize Invoices By

One Invoice Per Patient, Period: **Caregiver**

One Invoice Per Patient, Per Authorization ⓘ

One Invoice Per Patient, Per Day, Per Service Code

Max Visits Per Invoice for 837I: **and 837P:** ⓘ

Enforce Selected Prebilling Validations ⓘ



The screenshot shows the HHAExchange Enterprise Help Portal. The top navigation bar includes the HHAExchange logo and a search box labeled "Keyword Search". A left-hand navigation menu lists various categories such as "Welcome", "System Introduction", "Patient", "Caregiver", "Visit", "Action", "Billing", "Reports", "Dashboard", "Admin", "Mobile App", "Job Aids - General", "Process Guides/PDFs", "Videos", "Release Notes", "FAQs", "EVV Aggregation", and "Remote Support". The main content area is titled "Welcome to HHAExchange Enterprise Help Portal" and provides instructions on how to use the portal. It includes sections for "Search" (with a "Learn How to Search" button), "Browse" (with a "Learn How to Browse" button), "View traditional PDF versions of Provider Portal Process Guides" (with a "Learn How to Access Process Guide PDFs" button), and "Review Frequently Asked Questions from HHAX Support" (with a "View FAQs" button). A red box highlights the "Release Notes" section, which contains a bullet point: "• Latest Release Notes (23.10.01 Release Notes Available)". Below this, there is a "Navigation Tips" link. At the bottom of the page, a dark blue banner contains the text: "Can't find what you are looking for? Contact [Technical Customer Care](#) or [Live Chat](#) with us now."



Product Spotlight

Common Billing Holds & How to Fix Them



Visits with missing or incorrect information do not get invoiced or billed

Prebilling Review Search

From Date: 07/18/2023 **To Date:** 10/16/2023 **Office(s):** All **Contractor:**

Coordinator: All **Patient Team:** All **Patient Location:** All **Patient Branch:**

Discipline: All **Caregiver Team:** All **Caregiver Location:** All **Caregiver Branch:**

Patient: **Caregiver:** **Timesheet:** All **Service Code:**

Check All Validation:

- Unbalanced Visits
- Incomplete Confirmation
- With Temp Caregiver
- Caregiver Compliance
- POC Compliance
- Overlapping Shifts
- OT/TT Not Approved
- Restricted Caregivers
- Timesheet
- Insufficient Duty Minutes
- Authorization
- Clinical Documentation
- Medicaid Compliance
- Missing Service Portal Approval
- Custom Validations

Search **View Report**



Ensures the required compliance rules were fulfilled according to the authorizing contract.

HHaExchange - Non Skilled Visit Info ✖

Prebilling Problem(s): Caregiver Compliance, POC Compliance, No Authorization

Save **Close** **Print**

Audit [History](#)

Verified By: Patient Caregiver Family Member Other

Date Verified: **Time Verified:** **Supervisor:**

Duty Sheet POC: 0(00:00) Others: 0(00:00) Total: 0(00:00) Visit Duration: (06:00) [History](#)

Timesheet Required

POC Duties

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Duty Number	Category	Duty	Additional Value	Minutes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100	Personal Care	Bath-Tub		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	101	Personal Care	Bath-Shower		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	102	Personal Care	Bath-Bed		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	103	Personal Care	Patient requires Total Care		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	106	Personal Care	Mouth Care/Denture Care		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	107	Personal Care	Hair Care-Comb		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	108	Personal Care	Hair Care-Shampoo		





POC Compliance

Pre-Billing



Ensures the required compliance rules were fulfilled according to the authorizing contract.

<u>Visit Time</u>	<u>Discipline</u>	<u>Problem</u>		
<u>0800-1800</u>	HHA	POC Compliance		



Overlapping Shifts

Pre-Billing



Flags visits that have overlapping confirmations

Tuesday		Wednesday	
<u>2</u>		<u>3</u>	
<u>9</u>	S: 1000-1200 T <u>V: 1000-1200</u> <u>B: N (02:00)</u> <u>Hamilton Jasmine T</u>	<u>10</u>	i X
<u>16</u>	S: 1200-2000 T <u>V: 1152-1957</u> <u>B: N (08:00)</u> <u>Tate Andrew T</u>	<u>17</u>	i X
<u>23</u>		<u>24</u>	



Unbalanced Visits

Pre-Billing



An **Unbalanced Visit** is a visit with an EVV confirmation that falls outside the specified tolerance range

Schedule Visit Info Bill Info

Schedule:

* Schedule Time: 0845 - 1200 Temporary

POC: [dropdown menu]





Unbalanced Visits

Pre-Billing



An **Unbalanced Visit** is a visit with an EVV confirmation that falls outside the specified tolerance range

<u>Scheduled Time</u>	<u>Visit Time</u>	<u>Discipline</u>	<u>Problem</u>		
0800-1200	<u>0845-1200</u>	HHA	Unbalanced		



Unbalanced Visits

Pre-Billing



An **Unbalanced Visit** is a visit with an EVV confirmation that falls outside the specified tolerance range

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: ⓘ



Billing Review



If a visit violates a rule stipulated by a Payer, it is held at **Billing Review** until the error is corrected and cannot print invoices or submit e-claims.

The screenshot shows the HHAeXchange Billing Review Search interface. At the top, there is a navigation bar with tabs for Home, Patient, Caregiver, Visit, Action, Billing, Report, and Admin. On the right side of the navigation bar, there are icons for Notification (0), Messages (0), ToDo's (0), and Open Cases (0). The main content area is titled "Billing Review Search" and includes a "View:" section with radio buttons for "Summary View" (selected) and "Detail View" (with an information icon). Below this, there are several search filters: "View Holds For:" (E-Billing), "On Hold Reason:" (All), "Batch Number:" (empty), "Visit From Date:" (empty), "Group By:" (Contract), "Patient First Name:" (empty), "Invoice Number:" (empty), "Visit To Date:" (empty), "Office:" (All), "Patient Last Name:" (empty), "Invoice From Date:" (07/18/2023), "Service Code:" (empty), "Contract:" (All), "Coordinator:" (All), and "Invoice To Date:" (10/18/2023). At the bottom, there are "Search" and "Generate Report" buttons, with an information icon next to the latter. The page footer includes the text "Enterprise 23.09.01 TELXIMPW01 chrome 117" and "(Onboard".



Pending Billing of Additional Shifts on the Same Day

Billing Review



Tuesday		Wednesday	
<u>2</u>		<u>3</u>	
<u>9</u>	<div style="background-color: #e0ffe0; padding: 5px;"><p>S: 1000-1200 T ⓘ</p><p>B: Y (02:00)</p><p>Hamilton Jasmine T ⓘ</p><hr/><p>S: 1200-2000 T ⓘ</p><p>B: N (07:56)</p><p>Tate Andrew T ⓘ</p></div>	<u>10</u>	
<u>16</u>		<u>17</u>	



Pending Billing of Additional Shifts on the Same Day

Billing Review



Enterprise 23.09.01 NPRODWEB04 : 443 chrome 118 (Doc Chrome 118) 10

Billing Review Search

View: Summary View Detail View ?

View Holds For: Office: Contract: Coordinator:

On Hold Reason: Patient First Name: Patient Last Name: Admission ID:

Batch Number: Invoice Number: Invoice From Date: Invoice To Date:

Visit From Date: Visit To Date: Service Code:

Search Results (1)

Invoice Number	Invoice Date	Admission ID	Office Name	Patient Name	Contract	Coordinator	Visit Date	Service Code	Units	Amount on Hold	On Hold Reasons
605045	10/20/2023	NHC-900304	National Home Care LLC	Breadhead, Fred	Empire BCBS NY	Justin	10/10/2023	FC-HHA	8.00	\$30.00	Pending billing of additional shifts on same day
Total:									8.00	\$30.00	

DX Code May Fail Specificity Guidelines

Billing Review



Invoice Details Enterprise 23.09.01 TELXIMPW01 chrome 117 (Doc)

Invoice	
H Invoice Number: 600040 Edit	Admission ID: 900043
Patient Name: Parker Max	Address:
Total Billed: \$20.00	Total Hours: 02:00
Total Paid: \$0.00	Batch Number: 31067KOE000012
Batch Date: 07/26/2023	Check Number:
Payment Status: Open	Type of Bill:
H Invoice Date: 07/26/2023 Edit	Last Printed Date: Not Printed
Payer Reference Number: Edit	Office: Onboarding CS
Contract: Florida Blue	
Memo: <input type="text"/>	Save

Search Results (1) [Un-Export All](#) [Print Invoice](#)

Visits																
Date	Admission ID	Patient Name	Caregiver Name	Visit	Visit Hrs	Units	Visit Rate	Service Code	IT Hrs	Billed	Paid	Balance	3rd Party	Payment Status	Billing DX Code	Export Status
06/23/2023	KOE-900043	Parker Max	Caregiver Jen	1400-1600	02:00	8.00	\$10.00	PCA hourly		\$20.00	\$0.00	\$20.00	\$0.00	Open	N/A	N

Expenses/Supply/Mileage [Print Invoice](#)

No Supply/Expense/Mileage Found.

DX Code May Fail Specificity Guidelines

Billing Review



Billing Review

Billing Review Search

View: Summary View Detail View i

View Holds For:	<input type="text" value="E-Billing"/>	Office:	<input type="text" value="All"/>	Contract:	<input type="text" value="Florida Blue"/>
On Hold Reason:	<input type="text" value="All"/>	Patient First Name:	<input type="text"/>	Patient Last Name:	<input type="text"/>
Batch Number:	<input type="text"/>	Invoice Number:	<input type="text"/>	Invoice From Date:	<input type="text" value="07/17/2023"/>
Visit From Date:	<input type="text"/>	Visit To Date:	<input type="text"/>	Service Code:	<input type="text"/>

Search Results (1)

<u>Invoice Number</u>	<u>Invoice Date</u>	<u>Admission ID</u>	<u>Office Name</u>	<u>Patient Name</u>	<u>Contract</u>	<u>Coordinator</u>	<u>Visit Date</u>
600040	07/26/2023	KOE-900043	Onboarding CS	Parker, Max	Florida Blue	Jessica Alba	06/23/202




Discharge Date Elapsed


Billing Review




Discharge Date ✕

Discharge Date

* **Discharge Date:** 

* **Discharge To:** 

Reason: 

Note:

Save **Cancel**



Discharge Date Elapsed

Billing Review



Patient Info - Active

Name: Baldwin Lee

Admission ID: DVT-10102161

Patient ID:

Contract: United HealthCare
Medicaid

DOB: 06/21/1970

Primary Alt. Patient ID:

Home Phone:

Address: NEW YORK, NY, 10003



Coordinators: Jackie Smith

Office: DEVOTION HC

Languages: English

Contracts

Contracts

Contracts

Add

<u>Placement ID</u>	<u>Contract</u>	<u>Is Primary Contract</u>	<u>Alt Patient ID</u>	<u>Service Start Date</u>	<u>Source Of Adm</u>	<u>Service Code</u>	<u>Discharge Date</u>	<u>Discharge To</u>		
4390172	United HealthCare Medicaid	<input checked="" type="checkbox"/> H	Edit H	01/17/2022		Personal Care H	Edit		Additional Options	

Contract Status History

<u>Placement ID</u>	<u>Date</u>	<u>Contract</u>	<u>Note</u>	<u>User Name</u>
4390172	1/25/2022 11:11:00 AM	United HealthCare Medicaid	Contract Added(01/17/2022)	mpurdy



Missing Export Code or Taxonomy Code

Billing Review



HHaEXchange - Add Export Code ✕

Export Code

*** Export Code:**

Status: ▼

Save **Cancel**

Missing Export Code or Taxonomy Code

Billing Review



Contract Service Code

https://implementation.hhaexchange.com/ENT2309010000/Admin/AddCon...

Bypass Prebilling Validations: [i](#)

Bypass Billing Review Validations: [i](#)

Share Visit Info With Services Portal: [i](#)

Require Services Portal Approval: [i](#)

Allow Temporary Caregivers:

No Authorization Required for Billing:

Auto-Schedule Service Type ID: [i](#) (e.g. xxxx)

Weekend/Holiday Codes: [i](#)

Mileage Code: [i](#)

Default Mileage Code: [i](#)

NPI: [i](#)
 Use Blank Value [i](#)

Tax ID: [i](#)

Always List Caregiver NPI as Blank: [i](#)

Description: [i](#)

Code Configuration

Code

Export Code: [i](#)

Revenue Code:

Taxonomy Code: [i](#)

HCPCS Code:

GL Code:

Missing Export Code or Taxonomy Code

Billing Review



Search

Reference Table:

Page Loaded in 0.058 second(s).

Service Code: Discipline: Contract: Rate Type:

Search Results (20)

Service Code	Discipline	Contract	Rate Type	Visit Type	Mutual	Allow Patient Shift Overlap	Bypass Prebilling Validations	Bypass Billing Review Validations	Auto-Schedule Service Type ID	Mileage Code	Export Code	Revenue Code	Taxonomy Code	HCPCS Code	Live-in Units for Export	Hourly Rounding
PCA hourly	PCA	Florida Blue	Hourly	Hourly	No	No	No	No		No	T1019					
PCA hourly	PCA	Humana	Hourly	Hourly	No	No	No	No		No	T1019:U1					
PCA hourly	PCA	MetLife	Hourly	Hourly	No	No	No	No		No	T1020					
HAA Hourly	HHA	Florida Blue	Hourly	Hourly	No	No	No	No		No	T1019					
Comp Hourly	COMP	Florida Blue	Hourly	Hourly	No	No	No	No		No	T1020					
RN Visit	RN	Florida Blue	Visit	Routine	No	No	No	No		No						
HHA Hourly	HHA	Humana	Hourly	Hourly	No	No	No	No		No	T1019					
PCA HOURLY	PCA	Florida Blue	Hourly	Routine	No	No	No	No		No						
HHA HOURLY	HHA	Florida Blue	Hourly	Hourly	No	No	No	No		No						
HHA hha HOURLY	HHA	Florida Blue	Hourly	Routine	No	No	No	No		No						
RN VISIT	RN	Florida Blue	Hourly	Routine	No	No	No	No		No						
OT Hourly	OT	Florida Blue	Hourly	Hourly	No	No	No	No		No	T1020					
RN Visit	RN	Humana	Visit	Routine	No	No	No	No		No	T1020					
HHA Hourly	HHA	Florida Blue	Hourly	Hourly	No	No	No	No		No	T1019					
HHA Hourly 2	HHA	Humana	Hourly	Hourly	No	No	No	No		No	T1020					
HHA Metlife	HHA	MetLife	Hourly	Hourly	No	No	No	No		No	T1019					
HHA Hourly 2	HHA	Florida Blue	Hourly	Hourly	No	No	No	No		No	T1019					
HHA Split	HHA	Humana	Hourly	Hourly	No	No	No	No		No	T1019					
HMK Hourly	HMK	MetLife	Hourly	Hourly	No	No	No	No		No	T1019:U1					
Comp Hourly	COMP	MetLife	Hourly	Hourly	No	No	No	No		No	H1010					

Page 1 of 1 |

Missing Export Code or Taxonomy Code

Billing Review



Reference Table Management Enterprise 23.09.01 TELXIMPW01 (Chrome/117.0.0.0) chrome 117 (Doc Chrome 117) 10/18 16:03

Search

Reference Table:

Search Results (5)

<u>ID</u>	<u>Export Code</u>	<u>Status</u>
21493	T1019	Active
21494	T1020	Active
21495	T1019:U1	Active
21523	S5130	Active
21524	H1010	Active



Missing Export Code or Taxonomy Code

Billing Review



Reference Table Management

Search

Reference Table: Select

Fiscal

- Export Code**
- Contract Service Code
- Caregiver Pay Code
- Collection - AR Note Reason
- Deductions
- Delete Invoice Batch Reason
- Delete Invoice Reason
- Delete Invoice Visit Reason
- Delete Payroll Batch Reason
- Expense Reason
- Payment Adjustment Reason
- Collection - Representative
- Collection - Follow Up Representative
- Collection Status
- Collection - Claim Status
- Collection - Reason for Non-Payment
- Manual Hold Reason
- Payroll - Cost Center
- Payroll - Tax Types
- Payroll - Default Tax Location
- Payroll - Federal Filing Status
- Payroll - State Filing Status
- Payroll - Holidays
- Holiday/Weekend Codes
- Bank Code

Caregiver

Search



Q&A



Thanks for joining us!