

PRODUCT PULSE

Top Tools for Caregiver Management

September 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
- Top Tools for Caregiver Management
- Partner of the Month: NY Best Medical
- Q&A

Welcome! Meet the Speakers



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NY Best Medical



What's New

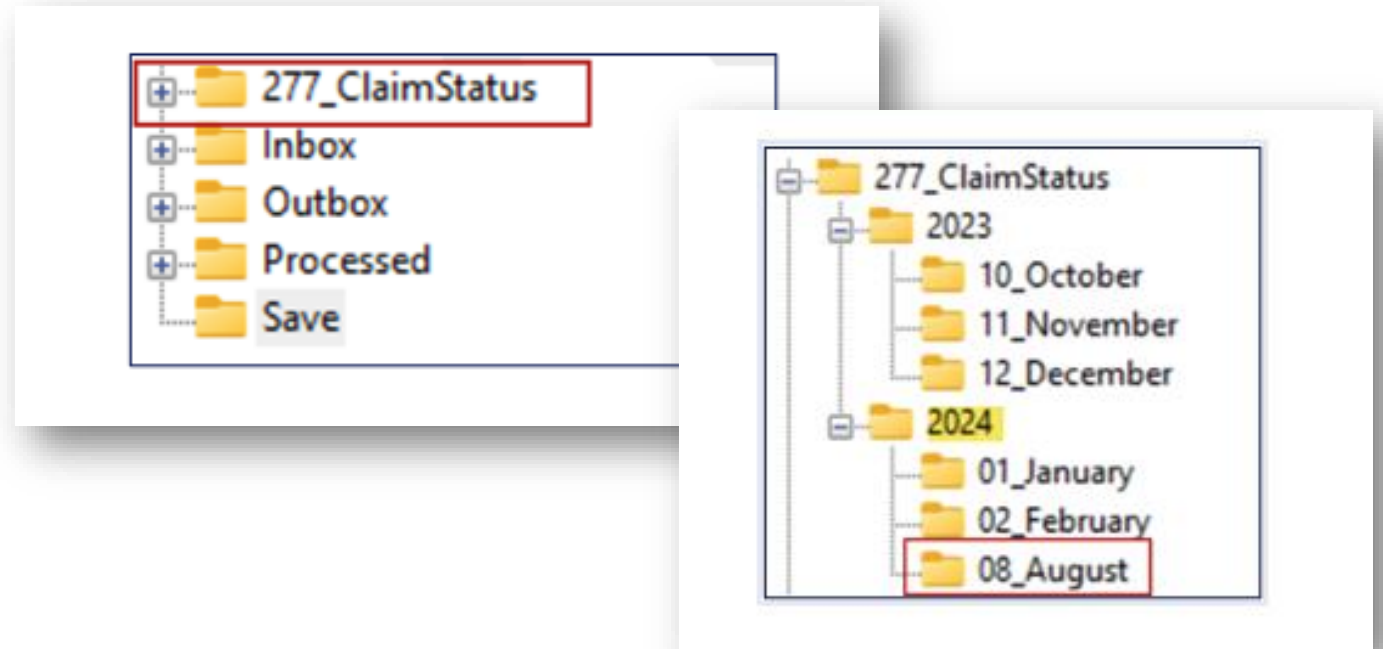
Recent Product News



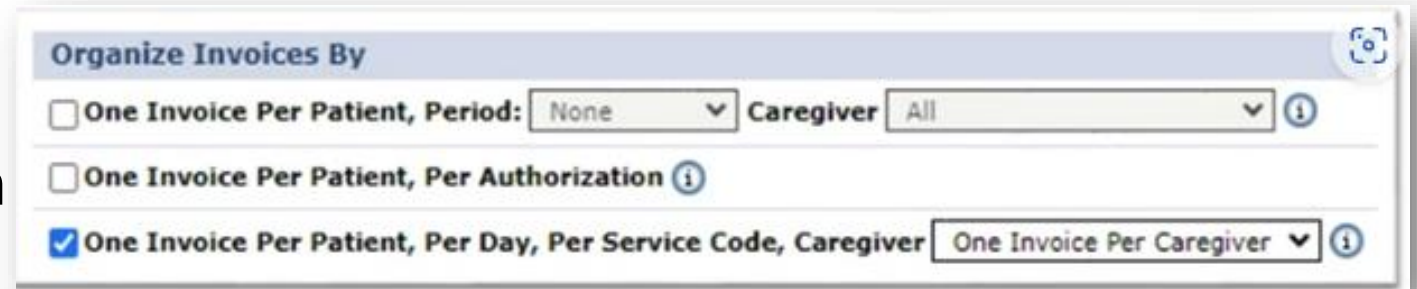
Recently Released



- **277CA Response Files Now Available for Providers with SFTP Sites:** Rectify claim rejection issues faster and without relying on HHAeXchange support input, resulting in faster payments.
- **Caregiver Option Added to Invoice Grouping:** Users now have the option to split invoices by caregiver when selecting the choice to organize invoices by Per Patient, Per Day, Per Service Code.



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





New York CDPAP PMPM Reimbursement Changes



A new three-step process is in place to support the changes that New York DOH has made to separate the direct care billing from the administrative component of the total rate.

The screenshot shows a web application interface for generating a CDPAP PMPM Tier Report. At the top, it says "CDPAP PMPM Tier Report" and "TELXSWEB01 Report No. 1178 - HHA Reports - Vendor". Below this are several input fields: "Office(s):" with a dropdown menu set to "All", "Contract(s):" with a dropdown menu set to "All", and "Service Code(s):" with a dropdown menu set to "All". There is also a "Year-Month:" field with "2024" and "July" selected. A "Print CSV" button is located below these fields. A note below the fields states: "Note: This report was intended for vendors servicing Consumer Directed Personal Assistance Program (CDPAP) cases. Some CDPAP contracts should be selected when running this report." Below the note are four bullet points: "• Servicecode is assigned based on range of hours as identified below:", "• 2443 = 1 - 130", "• 2444 = 180 - 475", and "• 2445 = 480+".

The screenshot shows a web application interface for importing a PMPM Confirmed Visits File. At the top, it says "Import PMPM Confirmed Visits File" and "Enterprise TELXSWEB01 (Chrome/128.0.0.0) chrome 128 (Doc Chrome 128)". Below this is a section titled "Upload & Import". A message says "Please select the interface type and the related import file to upload and import." Below this are two main sections: "Choose Import Interface Type:" with a dropdown menu set to "Confirmed Visits Import Process (NYPMPM)" and "Select File for Upload:" with a text input field containing "CDPAP_PMPM_Tier_August 2024.CSV" and a "Browse..." button. A note below the file selection says "Note: File must be 10000 KB in size or smaller." A "User Guide:" link points to "Confirmed Visits Import Process NYPMPM.pdf". At the bottom left, there is an "Upload & Import" button.

See the step-by-step process at:
knowledge.hhaexchange.com



Product Spotlight

*Top Tools for Caregiver Patient Management
in HHAeXchange*

> Complex Caregiver Management



Challenges:

- Agency-Caregiver communication is critical
- High staff turnover
- Inefficient staff
- Growth and Scalability Limitations



Top Tools for Caregiver Management



1 Broadcast

2 Mobile Messaging

3 In Service

4 Caregiver Rates



Communicating with Caregivers: Search Caregiver



Caregiver Visit Action Billing Report Admin

- New Caregiver
- Search Caregiver
- Search Caregiver (New)
 - Search Caregiver
 - General Caregiver Availability
 - Fill a Shift
- Bulk Pay Rate Adjust
- COVID-19 Survey
- Caregiver Chat

er (2) Staffed (0) Accepted with No Master Week(0)

Send Message

Text(SMS) messages are subject to HHAExchange reasonable use policy, and excessive usage may incur charges. If possible, please switch to the default 'Mobile App Notification' delivery method.

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

Delivery Method * Mobile and Text **Delivery Time** Now Schedule **Schedule Date/Time** 08/23/2024 10:28 AM

Recipients

- Cobblestonestein Steven
- Amandmore Elmira
- Hamburger Harriet
- Kanobi Obie-Wan
- Gomez-Ortiz Consuela
- Franz Pamela
- Grease Greasy
- Mathers Eminem
- Johnson Calvin
- Spitzer Elliot
- Harris Isabella
- Wilson Russell
- Ellenbogen Ellie
- Stewart Rod
- Lester Joy
- Lester Hope
- Long Betty
- jo Brie
- DeStefano Nicole
- Thornton Bella
- Smits Rachel
- Donahue Betty
- Davis Betty
- Jones Gloria
- Dennis Donna
- Gonzalez Julia
- Edwards Alice
- Wales Emma
- Ostrich Melinda
- Caregiver Dom
- Hasbro Mary
- Jacobs Leanne
- Penn Chad
- Martina Dina
- Piggins Justine
- Jelski Norman
- Bettis Jerome
- Gellar Frank
- Karla Frida
- Smalls S Mary
- Frost Fergie
- Sushi Vanessa
- Velez Melanie
- Nakashima Ichiro
- Terracotta Palmina
- Scott Michael
- Juno Janis

Script

Select Script Options

- Select Script Options
- Need PPD Documentation
- Need shift covered
- Replacement
- Snow Storm

Limit to 640 characters

Broadcast



Communicating with Caregivers: Caregiver General Availability



Caregivers

Caregivers **Caregiver General Availability** Fill a Specific Shift

Search General Availability [?](#)
All fields marked with an asterisk (*) are required.

Office* All **Discipline** **Status** Active

Gender All **Language** All **Date of Birth** mm/dd/yyyy **SSN**

Team **Street Address**

Availability All

Available to Work

Monday **Tuesday**

Live-In Live-In

Saturday **Sunday**

Live-In Live-In

Active Caregivers Availability Over a 7-day Period

List (436) Map (436)

Show availability information Legend: | Start/end of a payroll week | Scheduled Visit | Daily/Weekly Variable visit | In Service | Absence | Prefers to work these hours | Might work these hours

Caregiver	Friday, 8/23/2024	Saturday, 8/24/2024	Sunday, 8/25/2024	Monday, 8/26/2024	Tuesday, 8/27/2024	Wednesday, 8/28/2024	Thursday, 8/29/2024	Total Scheduled Hours	Availability Last Updated	Actions
Edwards Mason DVT-1033	1200-1500 0800-0800	--	--	1200-1500 0800-0800	--	1200-1500 0800-0800	1200-1500 0800-0800	12.00	07/15/2016	...
Mo Joe DVT-1034	1100-1600 0800-0800	--	--	--	--	1100-1600 0800-0800	1100-1600 0800-0800	15.00	08/11/2016	...
Allens Alberta QNS-1035	--	--	--	--	--	--	--	0	08/16/2016	...
Cobblestonestein Steven QNS-1036	--	--	--	--	--	--	--	0	08/16/2016	...
Amandmore Elmira QNS-1037	--	--	--	--	--	--	--	0	03/26/2020	...
Kanobi Obie-Wan BRX-1039	--	--	--	--	--	--	--	0	08/16/2016	...
Gomez-Ortiz Consuela MIA-1040	--	--	--	--	--	--	--	0	08/16/2016	...
Franz Pamela MIA-1041	--	--	--	--	--	--	--	0	08/16/2016	...
Grease Greasy MIA-1042	--	--	--	--	--	--	--	0	08/16/2016	...
Mathers Eminem DFT-1043	--	--	--	--	--	--	--	0	08/16/2016	...

Bulk Actions



Communicating with Caregivers: Fill a Specific Shift



HHAeXchange Home Patient Caregiver Visit Action Billing Report Admin

Caregivers

Caregivers Caregiver General Availability **Fill a Specific Shift**

Search to Fill a Specific Shift

Office: DEVOTION HC Patient: Acosta Carmela (DVT-900063) Date: 08/14/2024 Shift: Select

Advanced Filters

Available to Work

Monday: [Time Range] Tuesday: [Time Range] Wednesday: [Time Range] Thursday: [Time Range] Friday: [Time Range]

Saturday: [Time Range] Sunday: [Time Range]

Live-In: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Team: All Branch: All Location: All Discipline: All

Gender: All Language: All Date of Birth: mm/dd/yyyy SSN: [Field]

Type: Employee Status: Active Availability: All Preferences: All

Street Address: XXX City: NEWARK State: NJ Zip: 07103

Preferences

All

Filter

- All
- Service Coordination (DVT)
- Loves dogs (DVT)
- Children Under 18 (DVT)
- Infusion (DVT)
- Extra patience required (DVT)
- Dog Friendly (DVT)
- Multiple flights of stairs (DVT)
- no public transportation access (DVT)
- scared of dogs (DVT)
- Hoyer lift (DVT)
- Cooking (DVT)
- Cleaning (DVT)
- Dementia specialty (DVT)



Mobile Messaging



Disciplines Actions

ota	HHA			
Quick Broadcast				
Matching Caregivers				
NJ	PCA			
ire	HHA			

Total Visits Total Visits (83) | Total Call In (0) | Total Call Out (0)

Coordinators	Admission ID	Patient	Caregiver	Assignment ID	Office	Visit Date	Schedule Time	Visit Time	Call In	Call Out	Billed	Paid	Contract	Discipline
Jack Patterson	10102137	Affleck Ben		010101	DEVOTION HC	08/23/2024	1600-1700		N	N	N	N	Minnesota MCO	HHA
Angela DiBenidetto, Walt Frazier	900093	Jones Samuel	Frost Fergie Code: 1077	100077	DEVOTION HC	08/23/2024	1200-1800		N	N	N	N	UNITED NJ	PCA

Active Caregiver Availability Over a 7-day Period

List (11) Map (11)

Show availability information Legend: Start/end of a payroll week | Scheduled Visit | Daily/Weekly Variable visit | In Service | Absence

Caregiver	Distance	Friday, 8/23/2024	Saturday, 8/24/2024	Sunday, 8/25/2024	Monday, 8/26/2024	Tuesday, 8/27/2024	Wednesday, 8/28/2024	Thursday, 8/29/2024	Total Hours
<input type="checkbox"/> Gonzalez Paolo DVT-1523	4.6	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0
<input type="checkbox"/> Baldwin Taylor DVT-1761	6	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0
<input type="checkbox"/> Green Rachel DVT-1670	11	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0800-0800	0
<input type="checkbox"/> Caregiver Dom DVT-1066	16.5	0500-1000	0500-1000	0800-0800	1200-1700	1200-1700	1200-1700	0800-1700	34.0

Bulk Actions

- Message All Caregivers
- Message Selected Caregivers
- Broadcast Case to All Caregivers
- Broadcast Case to Selected Caregivers
- Export
- Edit Availability

01/25/2022



Broadcast Dashboard & Caregiver Communications History



Case Broadcast Message

⚠️ Text(SMS) messages are subject to HHAExchange reasonable use policy, and excessive usage may incur charges. If possible, please switch to the default 'Mobile App Notification' delivery method.

Delivery Method
Mobile and Text

Recipients

Caregiver Dom Lopez Jennifer Gonzalez Paolo Green Rachel Baldwin Taylor Smith Kevin Giada Del Johnson Joan Bryant Kobe Better Makau
Giver Jessica

Script
Select Script Options

Message
Limit to 640 characters

Broadcast Dashboard

View By: Single Shifts Master Weeks

Office(s): All selected | Coordinator: All | Contract: All

Status: Requested | Patient: | Team: All | Location: All

Branch: All | Visit From: | Visit To: | Discipline:

Caregiver Communications History

Search Communications

Office(s) *: All 23 of 23 Selected | Communication Type: All 5 of 5 Selected | Status: All 5 of 5 Selected | Subject:

> Advance filter



In Service



HHAEExchange Home Patient Caregiver Visit Action Billing Report Admin

Anthony Carmelo Active

Date of Birth: XX/XX/XXXX | Caregiver Code: DVT-1654 | Availability Updated: 3/16/2021

Home Phone: - | Address: XXX XXX | Languages: English | Provider (Office): DEVOTION HOMECARE (DEVOTION HC) | Team: - | Caregiver Hours: H | V 0

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

In Service

Year
2024
2023
2022
2021

Date	Time	Hours
06/12/2024	0900-1000	01:00
04/19/2024	1300-1400	01:00
04/18/2024	0600-0700	01:00
03/21/2024	0900-1200	03:00
03/06/2024	0900-1200	03:00
02/27/2024	1300-1400	01:00

Caregiver In Service

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

Date * Start Time * End Time * Office

Status Allow for In Service Overlap No Show

Topic * Location Instructor Language

Discipline * Pay Code * Discipline 2 Pay Code 2

Description

Count Towards Compliance

Cancel



In Service



HHAeXchange Home Patient Caregiver Visit **Action** Billing Report Admin

Add/Edit In Service

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

Date * 08/23/2024 **Start Time *** 0900 **End Time *** 1000 **Office *** DEVOTION HC

Max Attendees 20 **Allow for In Service Overlap** **Status *** Scheduled Completed

Topic * Agency Orientation (DVT) **Location** **Instructor** Select **Language** Select

Discipline * HHA **Pay Code *** Non Payable

Discipline 2 Select **Pay Code 2** Select

Description

Attendees (0 of 20)

Name	Caregiver Code	Alt. Caregiver Code	Phone Number	Count Towards Compliance	No-Show / Unsatisfactory	Add
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Save **Cancel**

Attendees (16 of 20)

Name	Caregiver Code	Alt. Caregiver Code	Phone Number	Count Towards Compliance	No-Show / Unsatisfactory	Add
Account Test Demo	DVT-1728	563636322	585-768-6886	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Almond Katie	DVT-1437	558668585858	906-636-3636	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Amgen Jackie	DVT-1165	2523636	223-994-1414	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Amone Frita	DVT-1496	254422		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Anderson Kathy	DVT-1463	858585	551-111-1112	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Anderson Taylor	DVT-1782			<input type="checkbox"/>	<input checked="" type="checkbox"/> Car Trouble	
Andes Cait	DVT-1751			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Anniston Jennifer	DVT-1456		774-473-3334	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Burger Lisa	DVT-1393	7474747888	846-535-3563	<input checked="" type="checkbox"/>	<input type="checkbox"/>	



Caregiver Rates



Anthony Carmelo Active

Home Phone: XXX XXX
Address: XXX XXX
Languages: English

Date of Birth: XX/XX/XXXX
Caregiver Code: DVT-1654
Availability Updated: 3/16/2021

Provider (Office): DEVOTION HOME CARE (DEVOTION HC)
Team: --
Caregiver Hours: H | V 0

Rates

Discipline	Patient Name	Admission ID	Pay Code	From Date	To Date	Hourly	Daily	Visit	Status	New
HHA			HHA Daily	03/16/2021	04/16/2022	10.000000	100.000000		Active	Edit
PCA			PCA Daily	03/16/2021	04/16/2022	10.000000	100.000000		Active	Edit
PCA									Active	Edit
HHA									Active	Edit
PCA									Active	Edit
HHA									Active	Edit

Add Rate

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

Discipline * Pay Code * Patient

Start Date * End Date * Status Active

Hourly Pay * Daily Pay * Per-Visit Pay

Cancel

Caregiver Visit Action Billing

- New Caregiver
- Search Caregiver
- Search Caregiver (New)
- Bulk Pay Rate Adjust**
- COVID-19 Survey
- Caregiver Chat

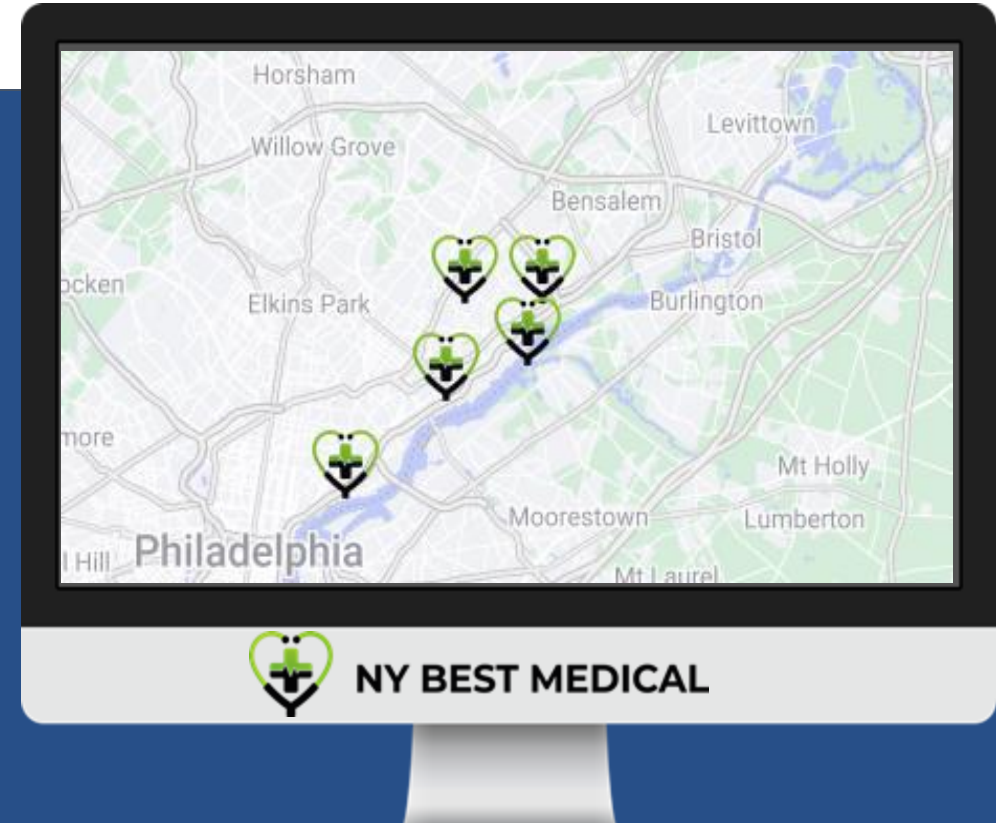


Partner Highlight

NY Best Medical

Ensuring Caregiver Compliance and Health

NY Best Medical offers a seamless solution for managing annual caregiver compliance and physical exams, ensuring ongoing regulatory adherence and workforce wellness.



Onboarding Assistance Program

Annual Physicals

**I9 & Work Authorization
Facilitation**



NY BEST MEDICAL



Annual compliance tracking, made easy.

Our advanced API Integrations track all required compliance documents and certifications to ensure caregivers meet regulatory standards year-round.

- Automated Documentation Submission
- Compliance data mapped and categorized
- Real time compliance tracking



- Employee demographic information
- Compliance status
- Schedule visibility (block appointments to reduce call outs)



Hassle-Free & Timely Reminders for Caregivers

- Real-time communication ensures caregivers stay on track without additional administrative follow-up.
- Scheduling via SMS at one of our many partner locations across Pennsylvania
- On-site and remote options for compliance checks



Operational Impact



**50%
Reduction in
Admin
Workload**



**400%
growth in
cases**



Q&A



Thanks for joining us!