



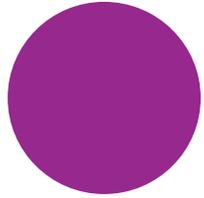
Help at Home.®

Care to Live Your Life.

HHAX Refresher Training  
*Operational Reporting*

September 7th, 2023





## Important Reminders

- Payroll
- Caregiver onboarding
- Authorization Number formatting
- Visit pay code matching
- Patient address validation



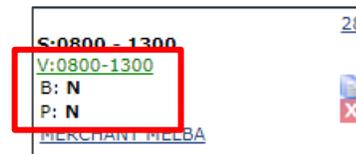
# The first payroll week in HHAX is wrapping up and ~98% of visits were included to be paid!

With the new system, it is possible that caregivers that are normally used to seeing their pay early may not see the full amount until Friday. Please tell them to wait to call with payroll concerns until their full paycheck is delivered on Fridays.

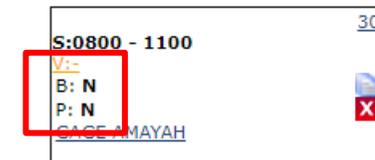
- 1. Branch staff will be the first line of defense for payroll issues that are reported by the caregiver**
- If a caregiver reaches out to branch with a payroll issue (i.e. did not receive pay, did not receive enough pay, etc.) take these steps:
  - Go to the caregiver's calendar and reviews all visits from the pay week in question
  - Use the indicators in the screenshots below to determine if the visit was paid
    - If it wasn't paid, review and fix any prebilling issues and notify the caregiver they will receive this visit's pay on their next paycheck
    - If the visit was paid but the amount was incorrect (e.g. wrong pay code, wrong pay rate, or wrong hours), you must send a request to the RCM team to uninvoice the visits so they can be adjusted. We will be establishing a Teams chat that includes RCM and Branch Managers. Please notify your branch manager when you have visits that need to be uninvoiced and they will reach out to RCM
      - Once you have been notified the visits were uninvoiced, you can fix them, and the updates will be reflected in caregivers next paycheck



Visit has been billed and paid



Visit has not been billed or paid, but the visit line is Green indicating no prebilling issues so it will be paid in next cycle



Visit has not been billed or paid, but the visit line is Yellow indicating there are prebilling issues

**If the branch is unable to complete any of the above steps, submit a ticket to [hhax@helpathome.com](mailto:hhax@helpathome.com).**

Include the patient's name, admission ID, description of payroll issue and relevant visits (if available)

# Caregivers must be added to HAH Portal first, to attain a Great Plains ID

1. Caregivers must be entered into the HAH Portal upon hire so that a Great Plains ID is generated
2. Once you have that ID, add it to the Alt Caregiver Code field on the caregiver profile
3. Do not enter anything but the real Great Plains ID in this field

Without this ID, caregivers will not receive pay

The screenshot shows a caregiver profile form with the following sections and fields:

- Caregiver Info Active**
  - Name: TROTTER GEORGETTA
  - Team: MS020\_FLD01
  - Address: JACKSON,MS,39213
  - Caregiver Code: 020-16925
  - Agency: Help at Home 2
  - Languages: English
  - Office: Jackson
  - Phone: [Redacted]
  - DOB: 04/17/1986
- Profile**
  - Demographics**
    - \* First Name: GEORGETTA
    - \* Last Name: TROTTER
    - \* Gender: Female
    - \* Caregiver Code: 020-16925
    - \* SSN#: 229-37-2765
  - \* Middle Name: [Redacted]
  - \* Initials: GT
  - \* DOB: 04/17/1986
  - Alt. Caregiver Code: 223000192539** (highlighted in red)
  - \* Mobile type: [Redacted]
  - \* Mobile Device ID: [Redacted]
  - \* Ethnicity: African American
- \* Enable Mobile Chat: N/A
- \* Time & Att. PIN: 117343
- \* Enable Mobile App Biometric Two Factor Authentication: [Redacted]
- \* Allow Caregiver to select the visit as a Community visit: [Redacted]

# Entering an Authorization Number if payor didn't provide one

- Authorization Number is a required field
- If you are entering an authorization but don't have one provided by the insurance, create one using this format:

Discipline – From Date - last 5 of admission ID

EXAMPLE: PCA-09-01-2023-12345

Orders

Patient Info - Active

Name: ACY JOYCE  
DOB: 04/10/1942

Admission ID: 033-85130

Primary Att. Patient ID: 000090558

Coordinators: Shaw, Cherie

Office: Greenwood

HHAExchange - Patient Authorization

Authorization

\* Contract: Mississippi-Waiver

\* Discipline: PCA

\* Authorization Number: PCA-09-01-2023-85130

\* Service Code: PCA - PERSONAL CARE ASSIST-MEDWAIV

\* From Date: 09/01/2023

\* To Date: 09/29/2023

Type: Hourly

Display: Hours Units

Period: Weekly

Max Hours for Entire Auth: 0.00 (Enter 0 for unlimited)

Specific Date Type:

Max Hours per Period: 40.00 Contract configured for Friday Authorization Week-Ending Day.

Additional Rules:

Document:

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

Billing Diagnosis Code(s):

This Patient has been configured with the following default Billing Diagnosis Codes. These codes will be used for billing unless specific Diagnosis Codes are entered here.

Code	Description	Admit.	Primary
N18.9	Chronic kidney disease, unspecified		Yes

# Pay code matching

1. The service code and pay code should ALWAYS match on a Master Week and a visit, or else the caregiver may receive the wrong pay for the type of service they are providing
2. When you change a TEMP caregiver to a real caregiver, make sure you do not forget to update the pay code to match the service code so the caregiver isn't assigned a Non Payable code

HHAXchange - Non Skilled Schedule

Visit Date: 9/13/2023 Patient Phone #:

Assignment ID: Coordinators: DANIELLE KING

Schedule Visit Info Bill Info

Schedule:

\* Schedule Time: 0800 - 1000  Temporary Caregiver Code: 029-14515  Temporary  
LOCKETT M DELISA

POC: 4571170-07/01/23 Assignment ID: \* Pay Code: HHA

\* Primary bill to: ANTHEM - Commercial Secondary bill to: --Select--

\* Service Code: HHA - ANTHEM Service Code: --Select--

\* H: 02 M: 00 H: M:

Bill Type: Hourly Bill Type:

Include in Mileage:  *i*

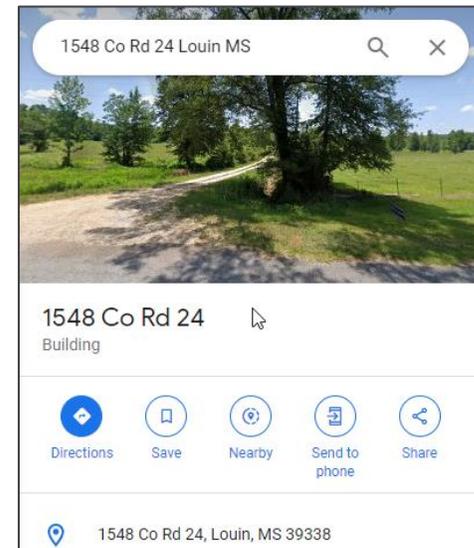
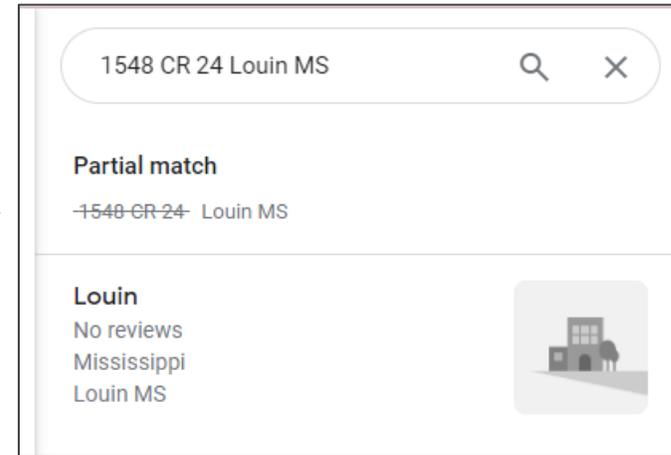
Import Reference Number: Visit Type: Hourly

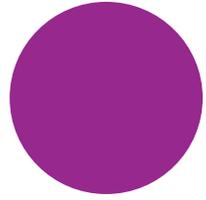
Save Close

# Patient address validation

When you are adding a new patient profile into HHAX, be sure to use Google to validate the address is in the correct format before you add to the patient's profile.

- Service coordinator provided you an address of “1548 CR 24 Louin, MS” but Google doesn't recognize the address
- Replace the CR with Co Rd and Google can now find the address
- The issue might be different with each address, but you should contact the patient to confirm their address if you cannot locate them on Google maps
- Ensuring you have a good address on the profile will help prevent GPS issues with caregivers



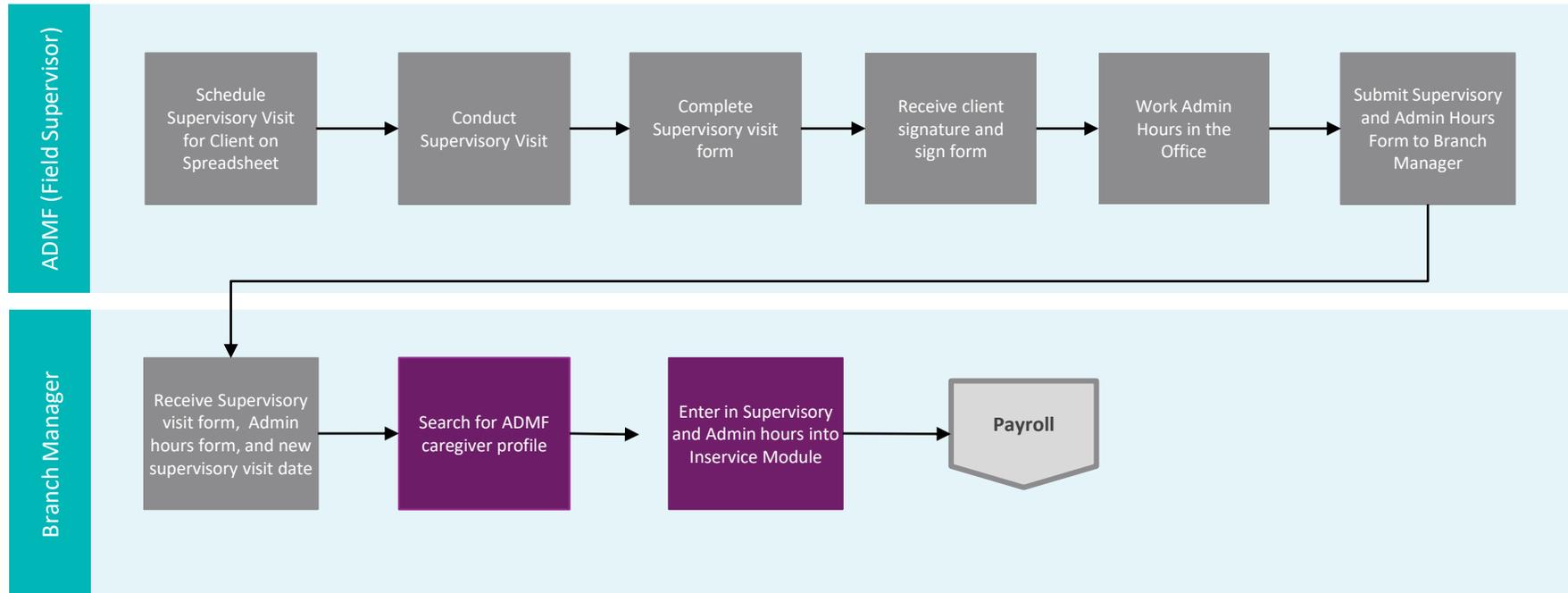


# ADMF Hours Tracking

# ADMF Admin Hours & Supervisory Visits

### ADMF Process Overview

- The ADMF Process is for Admin Field Employees who work Admin Hours in the Branch and perform Supervisory Visits in the field. (Most Supervisory visits are scheduled on a spreadsheet, not in HHAX). Branch Staff will need to enter the time for both Admin Hours and Supervisory Visit Hours each day for the ADMF Employee in the **In Service Module**.
- The ADMF Employee can also be scheduled on a regular Client visit. The visit would be set up like any other Client visit in the system, using the appropriate service code and matching pay code for that Client visit. You do not need to add these visit hours into the In-Service module because they will be paid on the visit they performed. To enter the ADMF Employees Admin Hours and Supervisory Visit Hours, follow the next two slides.



# ADMF Employee Works a Regular Visit

## ADMF Caregiver fills in for another Caregiver or Works a Regular Visit

- These steps outline how to schedule your ADMF Employee on a regular Client Visit

1. Navigate to the Client's Profile
2. Click on the Client's calendar, then open the client's visit
3. Add or replace the Caregiver with the ADMF Caregiver
4. Ensure the Service Code matches the Pay Code

**ADDITIONAL NOTES:** Do not change the Pay Code to ADMF. The employee will get the pay code base rate unless otherwise set up in their profile for that pay code. The visit will be billed to the payor and paid to the ADMF Caregiver. To pay the caregiver for admin time and supervisory visit time, follow the next two slides.

The screenshot displays the 'HHAeXchange - Non Skilled Schedule' form. At the top, it shows 'Visit Date: 9/13/2023' and 'Patient Phone #:' (empty). Below this, 'Assignment ID:' and 'Coordinators: DANIELLE KING' are visible. The form has three tabs: 'Schedule' (selected), 'Visit Info', and 'Bill Info'. The 'Schedule' section contains several fields: '\* Schedule Time: 0800 - 1000' with a 'Temporary' checkbox; 'Caregiver Code: 029-14515' (with a help icon) and 'LOCKETT M DELISA' with a 'Temporary' checkbox; 'POC: 4571170-07/01/23'; '\* Pay Code: HHA'; '\* Primary bill to: ANTHEM - Commercial'; 'Secondary bill to: --Select--'; '\* Service Code: HHA - ANTHEM'; 'Service Code: --Select--'; '\* H: 02 M: 00'; 'H: M:'; 'Bill Type: Hourly'; 'Include in Mileage: [ ] [i]'; 'Import Reference Number:' (empty); and 'Visit Type: Hourly'. At the bottom, there are 'Save' and 'Close' buttons.

# Adding ADMF Pay Rate

## Adding Pay Rate for ADMF Employee

- These steps outline how to ensure your ADMF Employee is set up with their custom ADMF Pay Rate.
  - **These steps for setting up the rate only apply if the Caregiver makes a different rate than \$12.00 an hour.**
1. Navigate to the Caregivers Profile and click on **Rates**
  2. Add a new pay rate for ADMF if it is different than the base rate of \$12.00. If you do not enter a custom rate, they will receive \$12.00 per hour.
  3. Enter the Following Fields:
    - a) **Discipline:** Other (Non-Skilled)
    - b) **Pay Code:** ADMF
    - c) **From Date & To Date:** Enter dates for the pay rate
    - d) **Hourly:** Enter Pay Rate
    - e) **Daily:** Enter 0.00
    - f) **Visit:** Enter 0.00

The screenshot displays the 'Caregiver Info' page for Barbara Abbott. The 'Rates' modal is open, showing the following fields:

- Discipline:** Other (Non Sk)
- Pay Code:** ADMF
- Admission ID:** [Empty]
- From Date:** 09/01/2023
- To Date:** 09/01/2024
- Hourly:** \$ 11.000000
- Daily:** \$ 0.000000
- Visit:** \$ 0.000000
- Active:**

The 'Rates' table below the modal shows the following data:

Pay Code	From Date	To Date	Hourly	Daily	Visit Status	
PCA	12/03/2021	08/25/2023	11.000000	0.000000	Active	Edit
HTR1	07/07/2023	12/31/2099	11.000000	0.000000	Active	Edit
RMM	12/03/2021	08/25/2023	11.000000	0.000000	Active	Edit
PCA	08/26/2023	12/31/2099	12.000000	0.000000	Active	Edit
RMM	08/26/2023	12/31/2099	12.000000	0.000000	Active	Edit

# Entering ADMF Hours

## Entering ADMF Admin + Supervisory Visit Hours

- This process is for entering the ADMF Hours + Supervisory Visit Hours for each day that it occurs. You will need to add up their Admin hours in the office and the Supervisory Visits they perform for each entry on the day they are performed.

- Navigate to the Caregivers profile and click on **In Service** tab
- Click on **Add** to add a new line
- Select the **Date** that the Admin Hours occurred (Note you will have to add an entry for each day they have Admin Hours)
- Select **Completed**

**NOTE: Include any supervisory visit hours for the day as well**

- Enter the **Start Time** – in this example its 8am or 0800.
- Enter **End Time** – in this example it is 4pm or 1600.
  - Total Hours worked is 8 hours (6 Admin Hours and 2 Supervisory Visits)
- Enter **Topic** : ADMF
- Select **Discipline**: Other (non-skilled)
- Pay Code**: ADMF
- Click **Save**

Enterprise 23.08.01 NPRODWEB03 : 443 chrome 116 (Doc Chrome 116) 9/01 15:03

**Caregiver Info Active**

Name: Jackson Courtney    Caregiver Code: 020-17018    Office: Jackson  
 Team:    Agency: Help at Home 2 - Training    Phone:  
 Address: CLINTON, MS, 39056    Languages:    DOB: 03/13/1995    Availability Updated: 6/21/2023  
 Caregiver Hours: H: 0    V: 0

**In Service**

Year	Total Hours
2023	08:00

Date	Time	Hours	Topic	Count Towards Compliance	Location	Instructor	Description	Status	Reason	Payroll Batch	
09/01/2023	0800-1600	08:00	ADMF	No			Courtney worked 8 Admin Hours today in the Jackson Office	Completed			Add

**HHA Exchange - Caregiver In Service**

**Caregiver In Service**

\* Date: 09/01/2023

Scheduled  Completed

Office: Jackson

\* From Time: 0800

\* End Time: 1600

Allow for In Service Overlap:

No Show:

\* Topic: ADMF (020)

Count Towards Compliance:

Location:

Instructor:

Language:

\* Discipline: Other (Non Skilled)

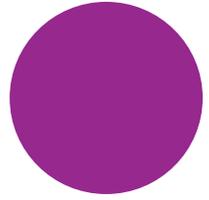
\* Pay Code: ADMF

Discipline 2:

Pay Code 2:

Description: Courtney worked 6 Admin Hours today in the Jackson Office and 2 Supervisory Visit Hours in the field.

Save Close



## Standard Reports



# Employee Onboarding and Maintenance Reports

Common Reports			
Report Name	Description	Use Case Example	HHAX Report Path
Medicals/Other Compliance Item Due Report*	This report shows items for the Caregiver that are due within defined parameters	Checking on Caregivers that have compliance items that are due or past due	Report > Caregiver > Compliance>Medicals/Other Compliance Item Due Report
Schedule by Caregiver (Detail/Summary*)	Scheduled view of all visits by caregiver	Use this feature to provide a calendar view of visits to the Caregiver	Report > Visits > Scheduling > Schedule by Caregiver (Detail/Summary)
Caregiver Expenses	Used by travel stipend team, or to view historical expenses paid to a caregiver	Travel Stipend team will use this report to validate their expenses entries	Report > Caregiver > Caregiver Expenses
Advanced Reports – Branch Managers			
Report Name	Description	Use Case Example	HHAX Report Path
Caregiver Rates	This report can show you the list of Caregivers and all applicable rates for each pay code in HHAX.	Rate evaluation for Caregivers across a pay code. Make sure to select the discipline and pay code before running the report	Report > Other Reports > Caregiver Rates
Caregiver with No Schedule	Identify caregivers that are not scheduled	Making sure we are staffing caregivers with any open Patients	Report > Caregiver > Caregiver with no schedule
Payroll Hours by Caregiver Detail with New Payroll V2*	This report lists payroll information (paid visits, travel time, and expenses) for all the Caregivers in the selected payroll batch. The report includes totals per Caregiver, as well as the grand totals for the batch. Prior week payroll per Caregiver is listed separately, at the end of the report. This report may be run for a single Caregiver, and/or Coordinator. This report may be grouped by Caregiver, combining current and prior week.	Review a Caregivers Pay for pay week(s) to review any inquiries about pay information from Caregivers	Report > Payroll > Payroll Hours by Caregiver Detail with New Payroll V2

\*Indicates Legacy Report

# Patient Intake and Clinical Reports

Common Reports			
Report Name	Description	Use Case Example	HHAX Report Path
Census by Primary Contract*	List of Patients with a particular contract on their profile	Use this report to review the list of patients that have a particular contract or payor	Report > Patient > Census by Primary Contract (Check blended service profiles checkbox)
Patients by Service Code	List of Patients that have a particular service code on their authorization	Review totals in each type of service	Reporting 2.0 > Patients > Patients by Service Code
Patients Not Yet Serviced	Identify patients that are waiting to start care	Any new or recertified patients are waiting to start care	Report > Other Reports > Patient > List of Patients Not Serviced
Schedule by Patient (Detail/Summary)	Scheduled view of all visits by patient	Use this feature to provide a calendar view of visits to the Patient	Report > Visits > Scheduling > Schedule by Patient (Detail/Summary)
Advanced Reports – Branch Managers			
Report Name	Description	Use Case Example	HHAX Report Path
Patient Activity Report	Used to review status by category	Review Patients on Hold	Report > Patient > Patient Activity Report
Discharge Event Report	Determine how many discharges in a given period	Review Discharged Patients	Report > Patient > Discharge Event Report Or Patient Activity Report
Authorizations by Due Date	Expiring Authorization Reports	Helps CS's be proactive with their Patients that have expiring authorizations	Report > Visits > Scheduling > Authorizations by Due Date
Authorizations Over Utilized	Detailed view of all visits that have authorization issues (missing, overserved, expired)	Looking to the next week to find and fix patient authorizations before they become prebilling issues	Report > Visits > Scheduling > Authorizations Over Utilized

\*Indicates Legacy Report

# EVV and Visit Maintenance Reports

Common Reports			
Report Name	Description	Use Case Example	HHAX Report Path
Individual Patient activity report	Review tasks completed during shift	If a timesheet is misplaced we can print the completed duty list	Report > Compliance > Duty Sheet by Visit Date
Unassigned Cases Report	View patients without a caregiver (or Temp) assigned	Review visits that do not have a caregiver assigned	Report > Exceptions Reports > Masterweek with Temp Caregiver or Visits with Temp Caregiver
Patient Signature Timesheet	Review Digital Timesheets for completed Visits	Use this 'Digital Timesheet' if the original timesheet is or when MS transitions away from Paper	Report > Visits > Visit > Patient Signature Timesheet
<b>Call Maintenance</b>	Shows list of call ins and call outs from the Caregiver either via IVR or mobile	To be used Daily to manage Caregiver clock ins/outs	Visit > Call Dashboard > View Report
<b>Pre-Billing</b>	Shows list of Visits with Issues that need to mitigated – Authorization, Compliance, POC, Needs Confirmation, etc.	To be used daily to confirm and correct visits with issues to stay on track for payroll each Tuesday	Billing > Pre-Billing > View Report
Advanced Reports – Branch Managers			
Report Name	Description	Use Case Example	HHAX Report Path
Auth v Proposed hours / Auth Summary	View weekly utilization	To review how we are utilizing Patient authorizations	Patient Authorization report/ Reporting 2.0
Scheduled Vs Actual Hours by Caregiver	Shows visits where the clock in/out time and the scheduled time were off by a set number defined by the user	View any visit where the start/end time was more than 15 minutes off from the scheduled start/end time	Report > Visit > Scheduling > Scheduled Vs Actual Hours by Caregiver

\*Indicates Legacy Report

# Example of a report in HHAX – Caregiver Compliance

## Report > Caregiver > Compliance > Medicals/Other Compliance Item Due Report

Medicals Other Compliance Item Due Report

Medicals/Other Compliance Item Due Report

Office(s): Starkville Compliance Type: All Compliance Item(s): All

Item Status: Pending, Overdue Item Result(s): All Discipline(s): All

Caregiver Type: Employee Contract(s): All Caregiver Status: Active

Caregiver Team(s): All Caregiver Location(s): All Caregiver Branch(es): All

Entry From Date: Entry To Date: Due Date From: Due Date To: 09/30/2023

Completion Date From: Completion Date To: Work From Date: Work To Date: Visit Status: All

Include: Address  SSN  Phone

Note: Report allows users not only to search for compliance items which are due, but also those which are overdue, pending, and completed.

Print Excel Create Mailinglist Label Send Message Generate Report

1 Set the report parameters accordingly. For example, this report will pull all Compliance details for all Caregivers in the **Starkville** office that are **Employees** and **Active**. It will show compliance items that are **Overdue** or **Pending**.

Click on Print Excel

2 Open the Excel file and filter the columns if you need to do detailed searching!

Caregiver Code	Caregiver Status	Caregiver Name	Caregiver Discipline	Office	Contracts	Caregiver Phone	Caregiver Email	Languages	Caregiver Team	Compliance Type	Compliance Item	Compliance Item Status	Compliance Result	Compliance Due Date	Compliance Completion Date	First Worked Date	Last Worked Date
034-15087	Active	BOATMAN E LINDA	CNA, HCSS, HHA, HMK, HSK, Other (Non Skilled), PCA, RESP	Starkville	Mississippi-Waiver	662-262-7327	etter89@yahoo.com	English	MS034_FLD01	Other Compliance	National Criminal Background Check (Fingerprint 43-11-13 or 41-4-7)	Overdue	N/A	01/13/2023	N/A	N/A	N/A
034-15089	Active	PATTERSON S VANORIA	HHA, HMK, HSK, Other (Non Skilled), PCA, RESP	Starkville	Mississippi-Waiver	662-794-0142	vanoriapbugs83@gmail.com	English	MS034_FLD01	Other Compliance	Auto Insurance/Waiver	Overdue	N/A	04/30/2023	N/A	N/A	N/A
034-14708	Active	BROOKS R TYMESHIA	HCSS, HHA, HMK, HSK, Other (Non Skilled), PCA, RESP	Starkville	Mississippi-Waiver	662-570-5243	tymeshabrooks86@gmail.com	English	MS034_FLD01	Other Compliance	HCBS Self-Attestation	Overdue	N/A	05/26/2023	N/A	N/A	N/A
034-14039	Active	CLARK SENITRA	HHA, HMK, HSK, PCA, RESP	Starkville	Mississippi-Waiver	662-341-2364	senitrajackson75@gmail.com	English	MS034_FLD01	Other Compliance	Driver's License/State ID	Overdue	N/A	05/31/2023	N/A	N/A	N/A
034-14106	Active	KEMP C ALICIA	HHA, HMK, HSK, PCA, RESP	Starkville	Mississippi-Waiver	662-617-4067/662-617-4067	kempalicia16@gmail.com	English	MS034_FLD01	Other Compliance	CPR Certification (on-line accepted)	Overdue	N/A	06/02/2023	N/A	N/A	N/A

# HHAX Demonstration

## Demonstration

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- Are there reports not mentioned today that you used before HHAX?
- What reports do you want to see demonstrated?





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