HHAX Refresher Training
Operational Reporting

September 7th, 2023
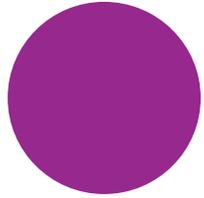
Important Reminders

- 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**

2. 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:
   1. Go to the caregiver's calendar and reviews all visits from the pay week in question
   2. Use the indicators in the screenshots below to determine if the visit was paid
      1. 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
      2. 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
         1. 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
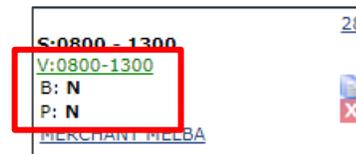
Visit has not been billed or paid, but the visit line is Green indicating no prebilling issues so it will be paid in next cycle
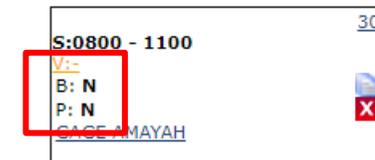
Visit has not been billed or paid, but the visit line is Yellow indicating there are prebilling issues

If the branch is unable to complete any of the above steps, submit a ticket to hhax@helpathome.com.
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

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:
DOB: 04/17/1986

Profile

Demographics
* First Name: GEORGETTA   Middle Name:
* Last Name: TROTTER   * Initials: GT
* Gender: Female   * DOB: 04/17/1986   H
* Caregiver Code: 020-16925   Alt. Caregiver Code: 223000192539
Caregiver Mobile ID: Mobile Type:
Enable Mobile Chat: N/A   Mobile Device ID:
Time & Att. PIN: 117343
Enable Mobile App Biometric Two Factor Authentication: Allow Caregiver to select the visit as a Community visit:
* SSN#: 229-37-2765 H   * Ethnicity: African American

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

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

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
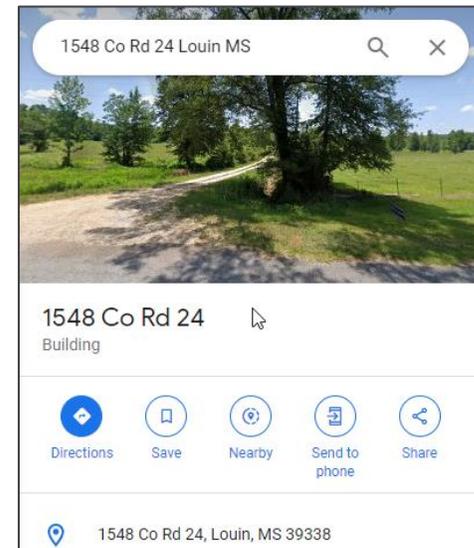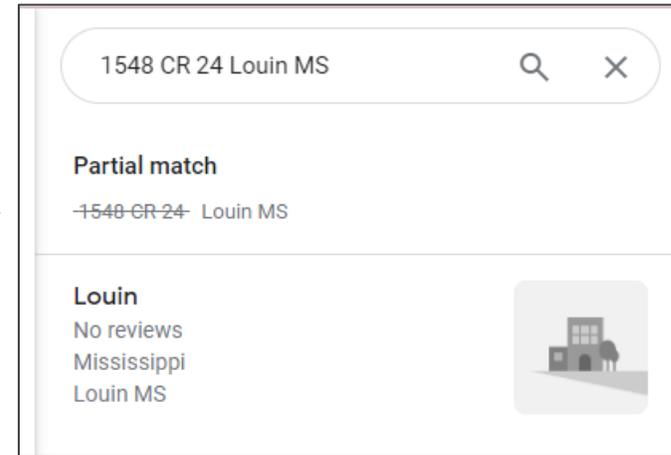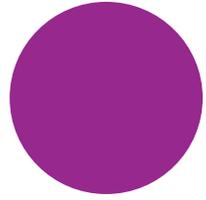
ADMF Hours Tracking

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*.

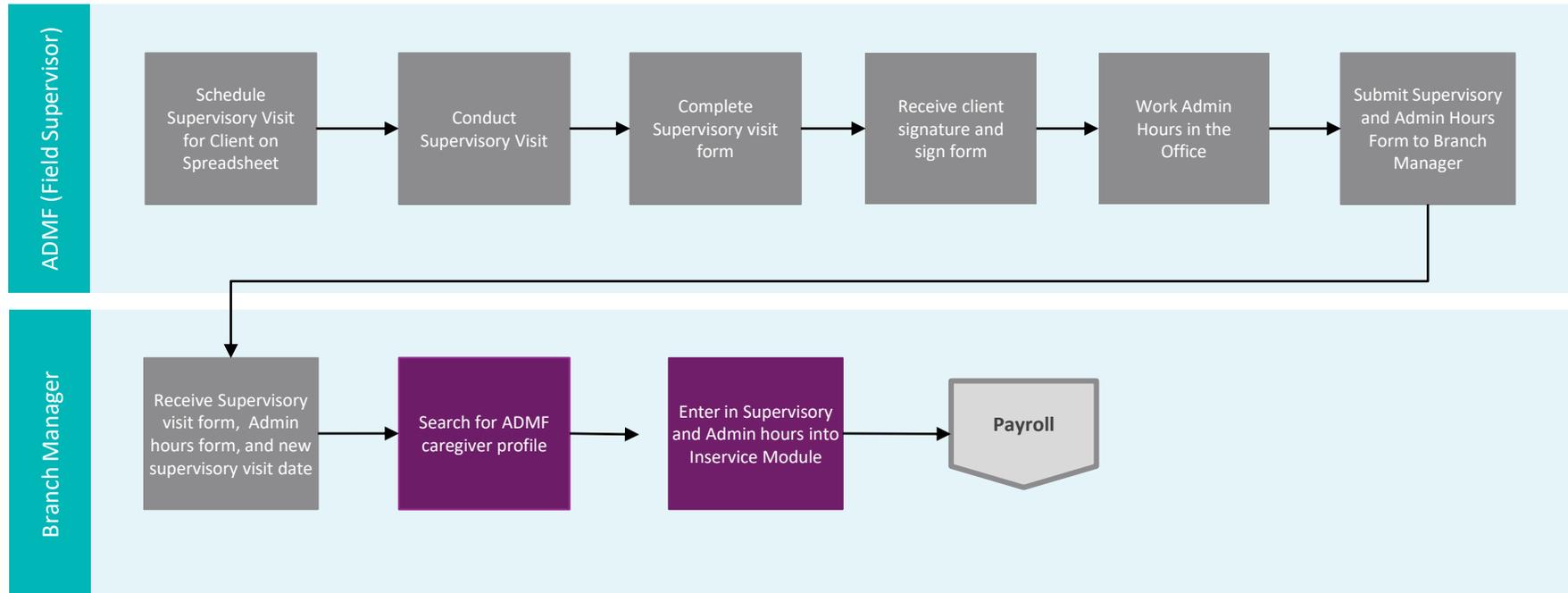- The ADMF Employee can also be scheduled on a regular Client visit. The visit would be set up like any other Client visit in the system, using the appropriate service code and matching pay code for that Client visit. You do not need to add these visit hours into the In-Service module because they will be paid on the visit they performed. To enter the ADMF Employees Admin Hours and Supervisory Visit Hours, follow the next two slides.

ADMF (Field Supervisor)

| Schedule Supervisory Visit for Client on Spreadsheet | → | Conduct Supervisory Visit | → | Complete Supervisory visit form | → | Receive client signature and sign form | → | Work Admin Hours in the Office | → | Submit Supervisory and Admin Hours Form to Branch Manager |

Branch Manager

| Receive Supervisory visit form, Admin hours form, and new supervisory visit date | → | Search for ADMF caregiver profile | → | Enter in Supervisory and Admin hours into Inservice Module | → | **Payroll** |

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.

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

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.

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

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

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

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

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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
Call Maintenance	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
Pre-Billing	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

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Example of a report in HHAX – Caregiver Compliance

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

- Are there reports not mentioned today that you used before HHAX?

- What reports do you want to see demonstrated?