

Our Webinar Will Begin Shortly

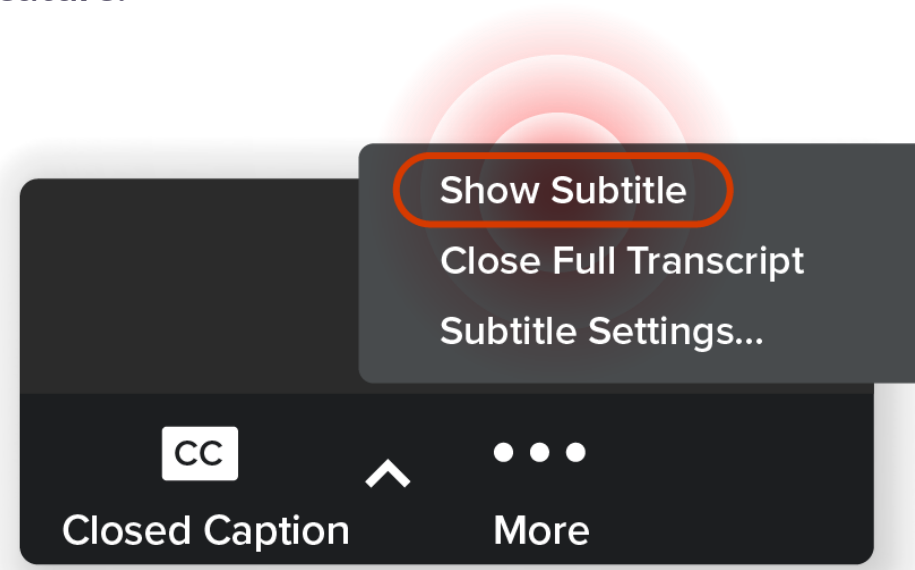
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- Q&A at the end. Please submit your questions in the Q&A box.
- This webinar is Closed Caption enabled.
- Please proceed by selecting the Closed Caption option at the bottom of your screen to enable feature.





Meet the Trainers!



George Marquez

Alejandra Cordova



- **Role: Senior Training Specialist**
- **Tenure at HHAeXchange: 7 years**
- **Areas of Expertise: Sponsored Provider Portals**



- **Role: Training Specialist**
- **Tenure at HHAeXchange: 2 years**
- **Areas of Expertise: Sponsored Provider Portals**

"From Hire to Homecare: A Day in the Life of a Homecare Admin and a New Caregiver"

May 2025

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This training will show providers a glimpse of the end-to-end process when onboarding , EVV capture, and Visit maintenance

Who should take this training?

Admin in your agency office and caregivers who will be documenting visits utilizing our EVV tools.

Objectives of Today's Training

You will be able to:

- **Explain** what EVV is, why it's needed, and how it works in HHAeXchange from start to finish.
- **Demonstrate** mobile app setup and usage.
- **Review** EVV elements, schedules, and reports.
- **Show** how to set up Mobile app, schedules, Visit maintenance, and run reports.





Agenda

➤ EVV overview

➤ Caregiver setup

➤ Mobile app setup

➤ Scheduling

➤ Performing EVV

➤ Visit maintenance/reports

➤ Key takeaways/resources

➤ Questions



EVV Overview



What is Electronic Visit Verification (EVV)?

- A digital way of keeping track of visits.
- Confirms that caregiver is arriving and leaving at the scheduled time of the visit.
- This helps make sure that everything is accurate and meets regulations & compliance.



> 6 Elements of a Cures Compliant Visit



Who

Member



Who

Caregiver



What

Type of
Service



Where

Location
of
Service



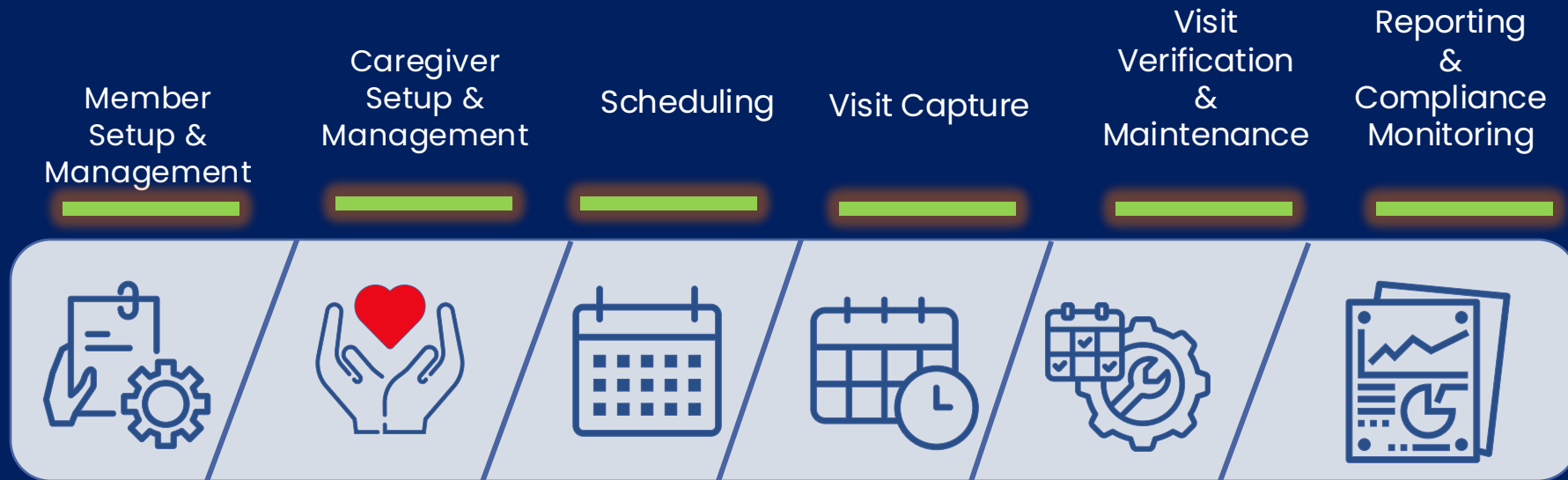
When

Date of
Service



When

Time of
Service



Caregiver Setup

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Scenario: Barbara is a new caregiver and has opted to use the mobile app. When you create her caregiver profile, you add her notification preference and enable mobile app access to send out the access code.

Steps:

1. Create the **caregiver's** profile.
2. Before saving Add the notification based on email or mobile app phone number.
3. In the **caregiver** profile, go to the mobile app setting section, and select enable access.
4. Select the notification preference and hit send.

Hello georgem

[Placements \(10 Pending\)](#)
[Events](#)
[System Notifications](#)
[Direct Messages](#)
[Tasks](#)
[Linked Communication](#)

Placements

[Pending \(1\)](#)
[Accepted with Temp Caregiver \(9\)](#)
[Staffed \(0\)](#)
[Accepted with No Master Week\(0\)](#)

Patient ^	Admission ID ^	Office ^	Start Date ^	Stop Date ^	Frequency ^	Service Category ^	Service Type ^	Request Sent At ^	Status ^	Cut Off Time ^	Contract Name ^
XXXXX	5141341354	UMA healthcare	11/12/2024			Home Health	PCA	11/11/2024 12:41:42 PM	Pending	11/16/2043 11:20:42 PM	Life Care Demo Payer
Previous1Next											



Scenario: Barbara is good with technology and has a cell phone. You set up some time to show her where she can find resources on setting up the mobile app and performing EVV.

Steps:

1. Go to the [Caregiver knowledge base.](#)
2. Select Getting started, and Training Videos, select HHAeXchange+ Mobile App
3. Barbara can follow the steps to download the mobile app and register.



Scenario: Barbara is good with technology and has a cell phone. You set up some time to show her where she can find resources on setting up the mobile app and performing EVV.

Steps:

1. Go to the [Caregiver knowledge base](#).
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3. Barbara can follow the steps to download the mobile app and register.

Scenario: Opal is a caregiver that is lives with her member. After her caregiver profile has been created, you will need to add her as a residing caregiver in the member's profile.

Steps:

- 1. Navigate to Member's Profile > Select Caregiver History.**
- 2. Scroll to the Residing Caregivers section > Select Add.**
- 3. Enter the caregiver's name.**
- 4. Add the Start and End dates for care.**
- 5. Select Save.**

Hello georgem

- [Placements \(9 Pending\)](#)
- [Events](#)
- [System Notifications](#)
- [Direct Messages](#)
- [Tasks](#)
- [Linked Communication](#)

Placements

- [Pending \(1\)](#)
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Mobile app setup

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Mobile app setup

Mobile app search and download



Scenario: Barbara has reviewed the steps to setup the mobile app. She will go to the app store and download the HHAX + mobile app.

Steps:

- 1. Caregivers should navigate to **App store** > Search for **HHAX + mobile app****
- 2. Download the app**
- 3. Ensure location services are active.**
- 4. Ensure the activation code has been received from the provider agency.**



Mobile app setup

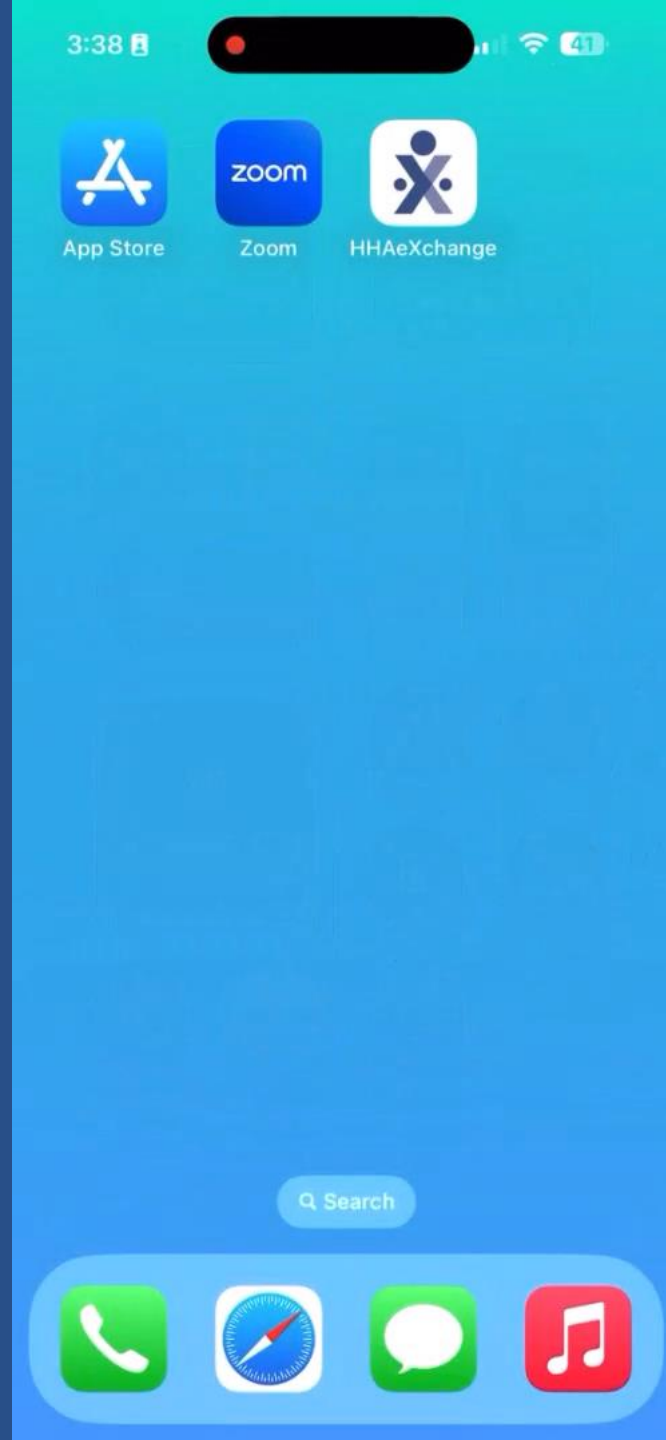
Mobile app register



Scenario: Barbara has downloaded the mobile app and will register for the mobile app.

Steps:

1. Caregivers should open **the app** > **Select Sign up here**
2. Register **email** and create **password**.
3. Confirm **email**.
4. Log in, **Select Perform EVV** and enter activation code.
5. Enter Demographic information and select **Save**.





Scheduling



Scenario: As an admin, I can use the member's calendar to schedule visits, ensuring Barbara is on time and within authorization limits.

Steps:

- 1. Go to the Member's calendar tab > Select the calendar date**
- 2. Select "New non-skilled visit".**
- 3. Add the scheduled time, Caregiver, Pay code, Primary Bill to, and Service code.**
- 4. Select Save to create the scheduled visit.**

Scenario: If the member needs to have a recurring schedule, the admin can do so by creating a master week.

Steps:

1. Go to the Member's **master week tab** > Select **Add master week**.
2. Select the **From date**.
3. Add the **scheduled time, Caregiver, Pay code, Primary Bill to, and Service code** for each day of the week.
4. Select **Save** to create the master week.
5. Select **Update calendar** and **update** to deploy the master week.

Performing EVV

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Scenario: Barbara is starting her shift today. She approaches the member's home and is ready to use the mobile app to clock in.

Steps:

1. Caregivers should open the **app** > **Log in**
2. Tap the **scheduled visit**, then select the **Clock in**.
3. Confirm **GPS location**, and tap **continue**
4. Congratulations Barbara is **clocked in** !



Scenario: Barbara has completed her shift and is ready to clock out for the day. She is still at the member's home and opens the mobile app.

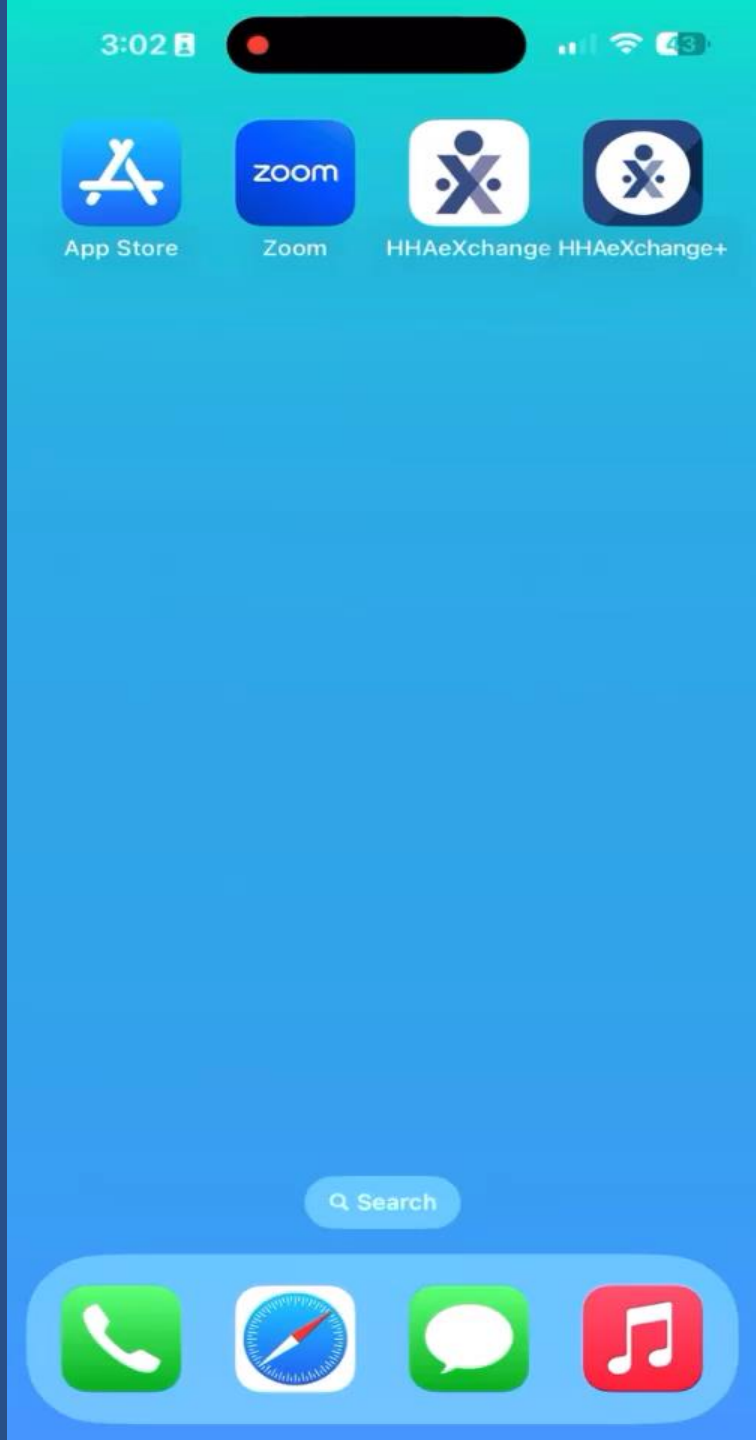
Steps:

1. Caregivers should open the **app** > **Log in**
2. Tap the **scheduled visit**, then select the **Clock out**.
3. Confirm **GPS location** and tap **continue**.
4. Congratulations Barbara has **clocked out** !



How to Clock In/Out via HHAX+ Mobile App Scheduled Visit







Scenario: Barbara has agreed to see this member at 3pm with no schedule. She can use the mobile app to create a unscheduled visit.

Steps:

1. Caregivers should open the **app** > **Log in**.
2. Tap **unscheduled visit**, then select the **member**.
3. Confirm **GPS location** and tap **continue**.
4. Congratulations Barbara has **clocked in** !



Scenario: Barbara has seen this member till 4pm and is at the end of her unscheduled shift. She will use the mobile app to clock out for the day.

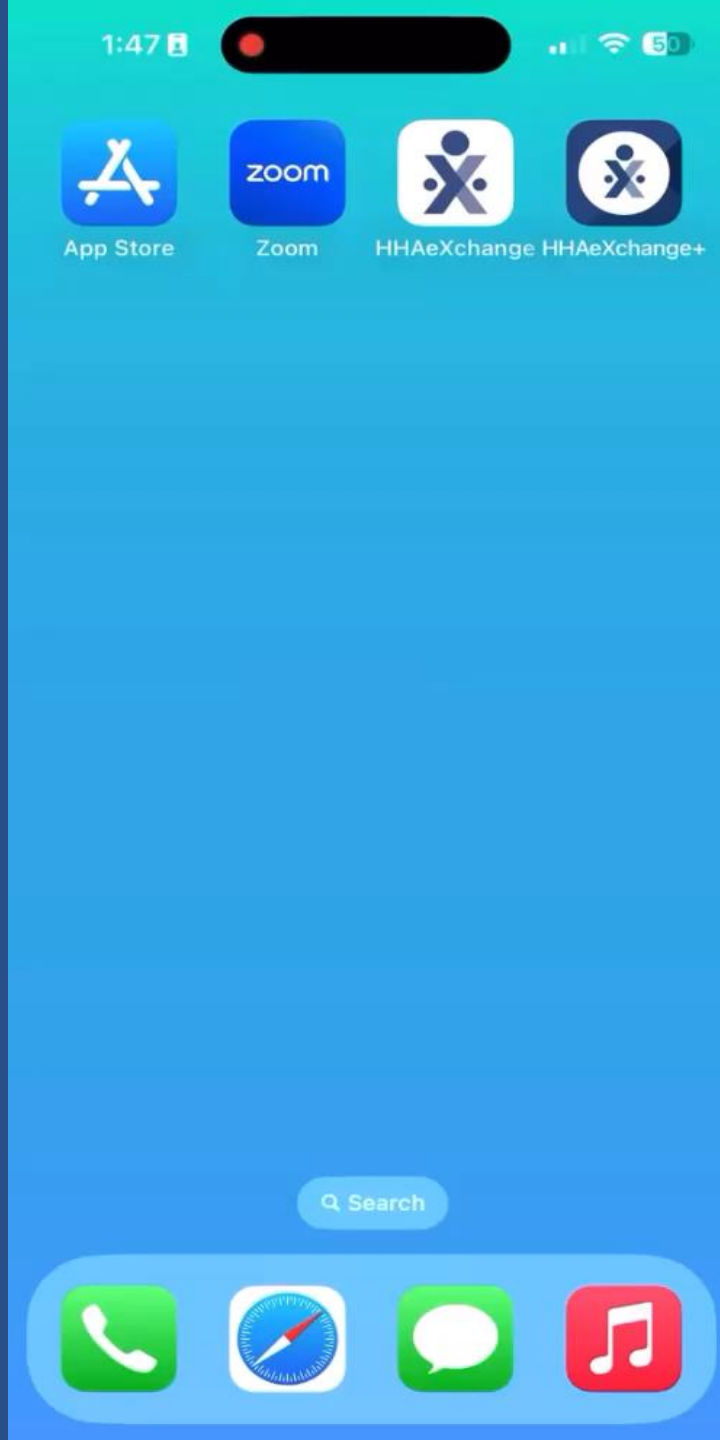
Steps:

1. Caregivers should open the **app** > **Log in**.
2. Tap the **active visit** and select **continue visit**.
3. Select **EVV clock out**.
4. Confirm **GPS coordinates**.
5. Congratulations Barbara has **clock out**!



How to Clock In/Out via HHAX+ Mobile App Unscheduled Visit





Visit Maintenance

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Visit Maintenance

What Is Visit Maintenance ?



- **Visit Maintenance** is HHAeXchange's newest feature release that provides major improvements to how you manage your visits!
- Let us review Barbara's Visits:
 - We can review if she completed visits.
 - Resolve EVV and Prebilling exceptions.
 - Link EVV to visits seamlessly.
 - View visit authorizations and details.



Navigate to **Visit > Visit Maintenance**

- The **Visit** tab allows you to search and filter visits based on exceptions and EVV type.

Filters Include	Actions Include
• Scheduled visits • In progress visits • Visits missing clock ins • Completed visits; and • Incomplete visits	• Review Visit details • Review Patient details • Review Caregiver details • Delete Visits

Hello georgem

- Placements (9 Pending)
- Events
- System Notifications
- Direct Messages
- Tasks
- Linked Communication

Placements

- Pending (1)
- Accepted with Temp Caregiver (8)
- Staffed (0)
- Accepted with No Master Week(0)

Patient ^	Admission ID ⇅	Office ⇅	Start Date ⇅	Stop Date ⇅	Frequency ⇅	Service Category ⇅	Service Type ⇅	Request Sent At ⇅	Status ⇅	Cut Off Time ⇅	Contract Name ⇅
XXXXX	5141341354	UMA healthcare	11/12/2024			Home Health	PCA	11/11/2024 12:41:42 PM	Pending	11/16/2043 11:20:42 PM	Life Care Demo Payer



Scenario: While Reviewing Barbara's visits you noticed that an EVV attempt was not automatically linked due to an exception, such as "No Schedule on Calendar" or "GPS out of range". To resolve this, you must review the suggested EVV times and manually link the EVV to the correct scheduled visit.

Steps:

1. Navigate to **Scheduled Visits**.
2. Locate the visit that needs to be reviewed and hover over the **Suggested EVV Confirmation** Icon. 
3. Review suggested EVV times listed the **Visit Time** column to confirm if they match the caregiver's actual visit time.
4. Click **Link/Edit** to connect the EVV to the visit.
5. Click **Save**.

Visit Maintenance

Presentation last saved: Just now

Visits

Unscheduled Services

EVV Attempts

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

Office *

UMA healthcare ×
UMA health care training ×
UMA MI office ×

Date Range *

04/01/2025



-

05/06/2025



Visit Status

Select one or more ▾

Visit Exceptions

Select one or more ▾

> Advanced Filters

Search

Reset

Visits

Legend: Auto-Linked | EVV Exception | Manually entered time | Suggested EVV confirmation | Time requires manual entry View All

Office: UMA healthcare UMA health care training 1 more Date Range: 04/01/2025 - 05/06/2025 Visit Status: Completed Caregiver: Zidane, Barbara [KHC-1106]

Date/Schedule ▾	Visit Time ▾	Patient ▾	Caregiver ▾	Visit Status	Visit Exceptions	Auth/Bill Info	Actions
05/01/2025 (NS) 0h 30m	Start: 10:45 AM End: 11:00 AM Duration: 0h 15m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed	• Caregiver Compliance	Life Care Demo Payer (KHC) T1019 697415456144	...
04/24/2025 (DF) 03:00 PM - 03:15 PM 0h 15m	Start: 03:00 PM End: 03:15 PM Duration: 0h 15m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed		Life Care Demo Payer (KHC) T1019 697415456144	...
04/24/2025 (NS) 0h 30m	Start: 01:45 PM End: 02:15 PM Duration: 0h 30m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed		Life Care Demo Payer (KHC) T1019 697415456144	...



Visit Maintenance

How to Manually Confirm Calls



Scenario: While reviewing Barbara scheduled visits for the week you locate a visit where Barbara either did not complete EVV, or the EVV data is invalid and can't be linked. In this case, you must manually confirm the visit by entering the visit details.

Steps:

1. Navigate to **Scheduled Visit**.
2. In the **Visit Time** column, hover over the **Pencil** icon on the visit that needs to be confirmed. 
3. Click **Edit**.
4. Fill in the required visit information.
5. Click **Save** to confirm the manual entry.

Visit Maintenance

[Visits](#)
[Unscheduled Services](#)
[EVV Attempts](#)

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

Office *

UMA healthcare x

UMA health care training x

UMA MI office x

Date Range *

05/06/2025

-

05/06/2025

Visit Status

Select one or more

Visit Exceptions

Select one or more

> [Advanced Filters](#)

Search

Reset



Unscheduled Services

Converting Visits



Scenario:

The member has requested Barbara stop by outside of her schedule visits. She performs a unscheduled visit using the mobile app. Using the Unscheduled Services tab, you can review EVV times and quickly convert the EVV into a visit and link it for billing – saving you time and ensuring your visits are compliant.

Steps:

1. Navigate to **Suggested Visit**.
2. Hover on the **Suggested EVV confirmation** icon next to the EVV entry you want to review 
3. Review the suggested visit times located in the **Visit Time** column.
4. Click **Convert to Visit** to create scheduled visit.
5. Click **Save**.

Visit Maintenance

[Visits](#)
[Unscheduled Services](#)
[EVV Attempts](#)

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

Office *

UMA healthcare x

UMA health care training x

UMA MI office x

Date Range *

05/06/2025



-

05/06/2025



Visit Status

Select one or more

Visit Exceptions

Select one or more

> [Advanced Filters](#)

Search

Reset

Reports

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Reports

EVV compliance by Caregiver report



Scenario:

Barbara has been performing services for a week, and I want to check on her EVV progress. To do so I am going to use the EVV Compliance by Caregiver New report.

Steps:

1. Navigate to **Reports > EVV Compliance reports > EVV compliance by caregiver.**
2. Select date range, office, and caregiver names.
3. Select View Report.
4. Review EVV exceptions and EVV Compliance percentage columns.
5. Click Export and choose preferred Format.



Reports

EVV compliance by Caregiver report



EVV Compliance By Caregiver (New)

Page 1 of 1

Report Date: 05/07/2025 17:07

Office(s): UMA healthcare ,UMA MI office,UMA health care training	From Date: 5/1/2025	To Date: 5/7/2025
Caregiver: All	Type of Service: Non-Skilled	Coordinator: All
Discipline(s): All	Service Code(s): All	Contract(s): All
Caregiver Location(s): All	Caregiver Team(s): All	Caregiver Branch(es): All
Include Type: All		

Sr.#	Contract ↕	Caregiver Code ↕	Caregiver Name ↕	Total Visits ↕	Confirmed Visits ↕	Total EVV Compliant Visits ↕	Billed Visits ↕	Missed Visits ↕	Visit with Exceptions ↕	% Exceptions ⌵	EVV Compliance Percentage ↕
1	Life Care Demo Payer (KHC)	UMA-1008	Freeman Jane	4	1	0	0	0	1	100.00%	0.00%
2	Life Care Demo Payer (KHC)	KHC-1003	Lopez Maria	18	1	0	0	0	1	100.00%	0.00%
3	Life Care Demo Payer (KHC)	KHC-1006	Shah2 Samir	5	1	0	0	0	1	100.00%	0.00%
4	Life Care Demo Payer (KHC)	KHC-1106	Zidane Barbara	3	3	2	0	0	1	33.33%	66.67%
5	Life Care Demo Payer (KHC)	KHC-1026	Bell Vicky	12	0	0	0	0	0	0.00%	0.00%



Reports

EVV compliance by Caregiver report



Scenario:

Barbara has been performing services for a week, and I want to check on her EVV progress. I want to review which exceptions she is using so I can determine any training that is needed for Barbara to perform EVV.

Steps:

1. Navigate to **Reports > EVV Compliance reports > EVV compliance detail report.**
2. Select **office**, **Visit date range**, and **caregiver** names.
3. Select **Print Excel.**
4. Review EVV exceptions and EVV Compliance percentage columns.
5. Click Export and choose preferred Format.



Reports

EVV compliance by Caregiver report



Sr. #	Contract	Admission ID	Patient Name	Visit Date	Schedule Time	Caregiver Code	Caregiver Name	Time Sheet	Call In Time	Call In Number	Call Out Time	Call Out Number	Service Code	Invoice Date	Invoice Number	Billed Hours	Audit	EVV Exception	Exception Info
1	Life Care Demo Payer (KHC)	900103	Grey Lexie	05/02/2025	1000-1200	1106	Zidane Barbara						T1019					3 - Missing both in and out call	Visit: User: PEdemoAC (05/01/25 12:48) Reason: No reason Act. Taken: Notes: ----- Visit: 1300-1400 User: georgem (05/06/25 12:04) Reason: Forgot to Call In/Out Act. Taken: Forgot to Call Notes: Barbara forgot to call in/out. ----- Visit: 1000-1200 User: georgem (05/06/25 12:08) Reason: Forgot to Call In/Out Act. Taken: Forgot to Call Notes: Barbara forgot to call in/out.
2	Life Care Demo Payer (KHC)	900005	Lee Walter	05/05/2025	2000-2200	1003	Lopez Maria						S5130					3 - Missing both in and out call	Visit: User: Masterweek Rollover Process (04/14/25 00:25) Reason: No reason Act. Taken: Notes: Updated By Masterweek Rollover Process
3	Life Care Demo Payer (KHC)	900005	Lee Walter	05/06/2025	0800-0900	1008	Freeman Jane						S5130					3 - Missing both in and out call	Visit: User: Masterweek Rollover Process (04/15/25 00:26) Reason: No reason Act. Taken: Notes: Updated By Masterweek Rollover Process
4	Life Care Demo Payer (KHC)	900005	Lee Walter	05/06/2025	1200-1300	1006	Shah2 Samir						T1019					3 - Missing both in and out call	Visit: User: Masterweek Rollover Process (04/15/25 00:26) Reason: No reason Act. Taken: Notes: Updated By Masterweek Rollover Process



Key Takeaways

Key Takeaways



- Ensure employment type of caregiver matches the service that the member is receiving.
- Ensure your caregivers are aware of expectations when it comes to EVV and why it's important.
- Train your staff on EVV tools and share available resources.
- Although optional, using the scheduling feature streamlines the tracking of authorization hours and/or units.



Resources

> Caregiver Training Resources



- [Caregiver Knowledge Base](#)

- Documentation
- Videos
- FAQs

HHAeXchange Caregiver Knowledge Base

Search documents, videos, and help resources





Getting Started

Browse resources to help get you started on the right foot with HHAeXchange.



What's New

Learn about HHAeXchange's latest features and updates.



FAQs

HHAeXchange FAQs is a one-stop shop for our customers' most common questions and their answers.



Troubleshooting

See common holds and errors and the steps to resolve.



Training Videos

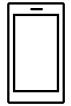
Watch training videos to refresh your skills and knowledge of HHAeXchange features and functionality.



Documentation

Documentation includes an extensive collection of topics for all of our product features.

> Caregiver Training Resources



- Mobile Resources

- Access the HHAeXchange+ Mobile App
- Clock In/Out infographic

The screenshot displays the HHAeXchange website interface. At the top, the HHAeXchange logo is on the left, and a search bar is on the right. A left-hand navigation menu includes links for Home, Getting Started, What's New, Frequently Asked Questions, Troubleshooting, Training Videos, Documentation, Mobile (highlighted), and Contact and Support. The main content area is titled 'Caregiver Mobile' and features two side-by-side infographics: 'How to Clock In/Out via HHAeXchange Mobile App Screenshot View' and 'How to Clock In/Out via HHAeXchange Mobile App Screenshot of Web'. Each infographic shows a four-step process for logging in and clocking in/out. Below the infographics, a note states: 'Note: Some features may not be available in your portal. Features depend on role, permissions, and portal type.' At the bottom, there are links for 'Mobile App Caregiver Overview' and 'Mobile App Caregiver Classic Guide'.

How many employees does HHAeXchange have?

Feedback

- [Download, Sign Up and Register for Mobile Access](#)
- [How to Link a Caregiver to a Patient for Unscheduled Visits on Vimeo](#)
- [How to Create an Individual Visit](#)
- [How to Create a Master Week](#)
- [How to Clock In & Out for a Scheduled Visit](#)
- [How to Clock In & Out for an Unscheduled Visit](#)
- [Offline Mode](#)
- [Visit Maintenance Feature Knowledge Base](#)
- [EVV Compliance Report Knowledge Base](#)



Questions?

**THANKS FOR
ATTENDING!**



*Please provide us your feedback
after exiting the webinar.*



Thank you!