Our Webinar Will Begin Shortly

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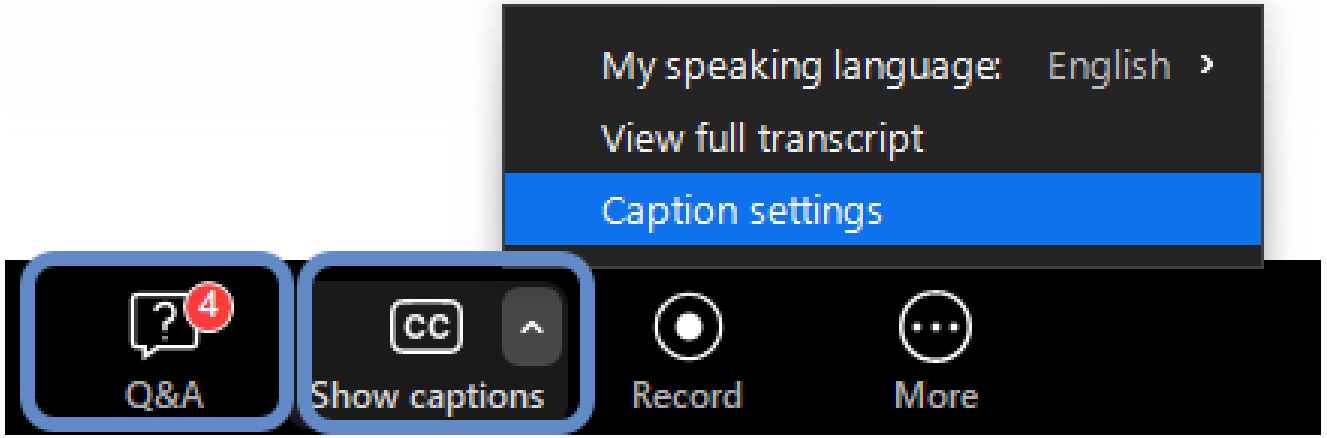

Meet the Trainer

Ashley Cho

- **Role:** Senior Training Specialist
- **Tenure at HHAeXchange:** 3 Years
- **Areas of Expertise:** Billing, Revenue Cycle
- **Fun Fact:** I've read about 65 books so far this year

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System & Data Setup Essentials

August 2025

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System & Data Setup Essentials

This training will provide a step-by-step introduction to getting started with the HHAeXchange platform. You'll gain a clear understanding of how to configure initial setup, user management, and onboarding tools.

Who should take this training?

Anyone who will be responsible for setting up and managing the HHAeXchange portal.

Example: Admins, agency owners

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Objectives of Today's Training

You will be able to:

- Navigate the HHAeXchange portal.
- Manage agency users.
- Manage client & caregiver profiles.
- Understand the steps required to move forward in the onboarding process.

Humana VA: Milestone Trainings

Date	Session
Aug 19	Milestone 1: Data Setup & System Essentials
Aug 26	Alternative EVV (EDI) Onboarding
Sep 9	Milestone 2: Scheduling & Visit Capture
Sep 18	Milestone 3: Visit Verification & Visit Maintenance
Sep 23	Milestone 4: Billing
Oct 7	Alternative EVV (EDI) Post Integration
Oct 14	Milestone 5: Reporting & Compliance Monitoring

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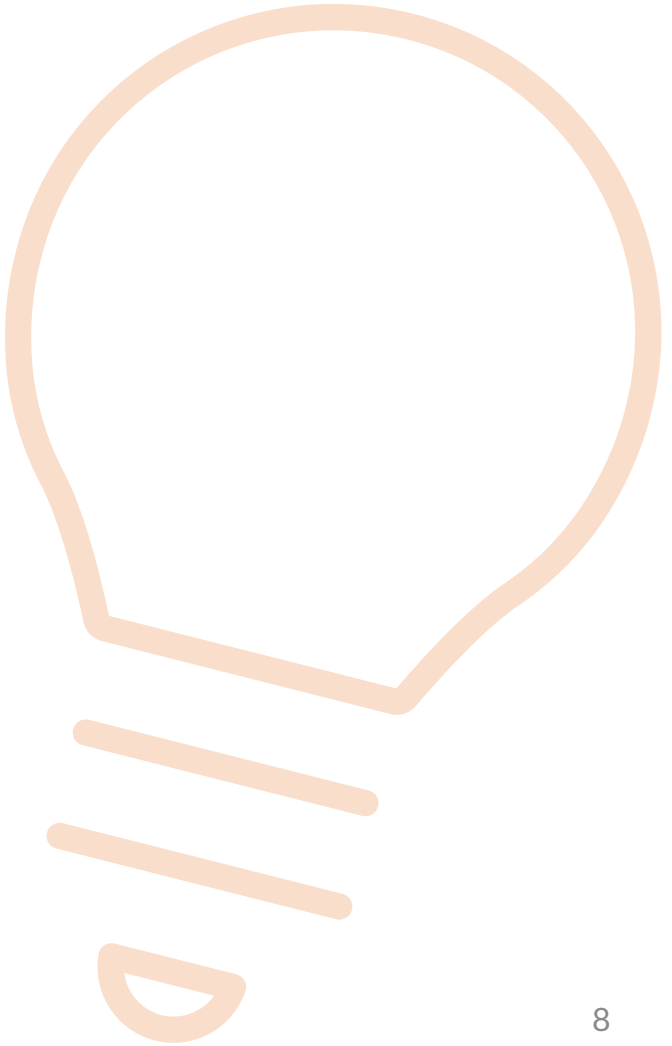
Knowledge Checks

You'll see these throughout the presentation!

What's the name of the presenter of this webinar?

A. George
B. Alejandra
C. Alex
D. Ashley



Agenda

- EVV Overview/Housekeeping
- Provider Portal Navigation
- User Management
- Caregiver Management
- Client Management
- Next Steps in Onboarding Process
- Key Takeaways
- Support Resources
- Questions

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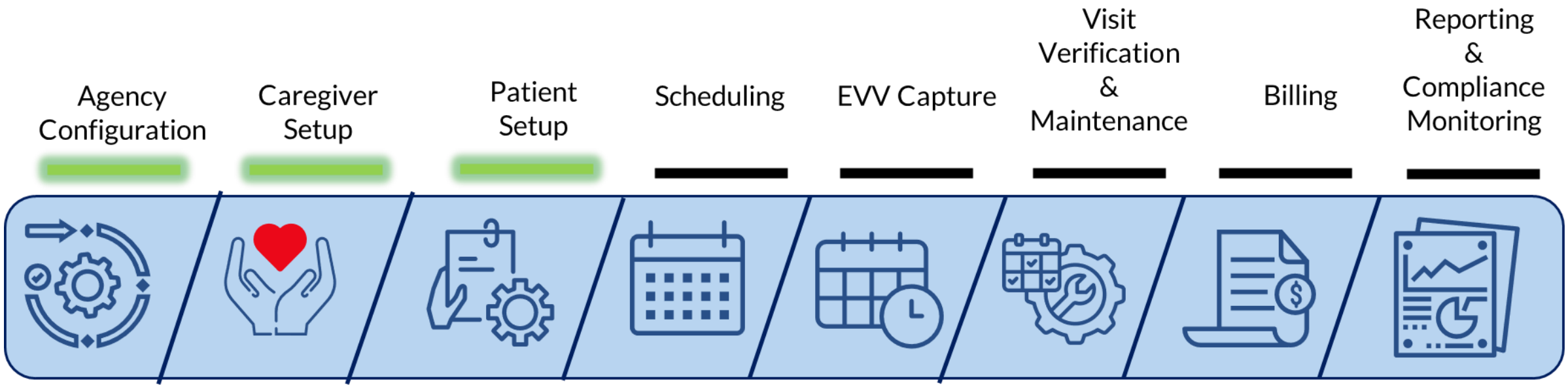
EVV Tracker



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EVV Overview

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6 Elements of a Cures Compliant Visit

Who

Patient

Who

Caregiver

What

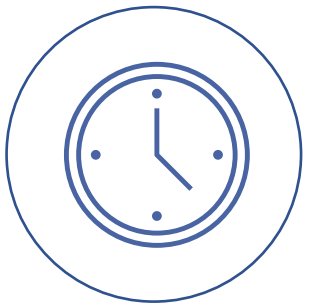
Type of Service

Where

Location of Service

When

Date of Service



When

Time of Service

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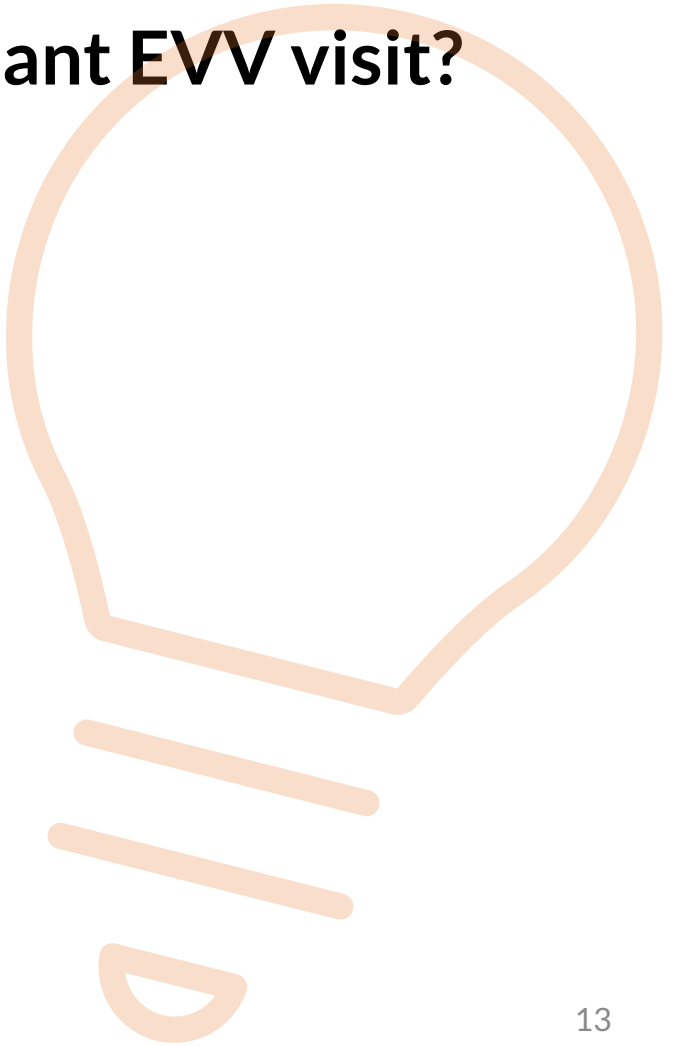
Knowledge Check

EVV Overview

Which is NOT a requirement for a CURES Act Compliant EVV visit?

A. Caregiver name
B. Documentation of the client's health history
C. Recording the start and end times of the service
D. Location of the visit



Provider Portal Navigation

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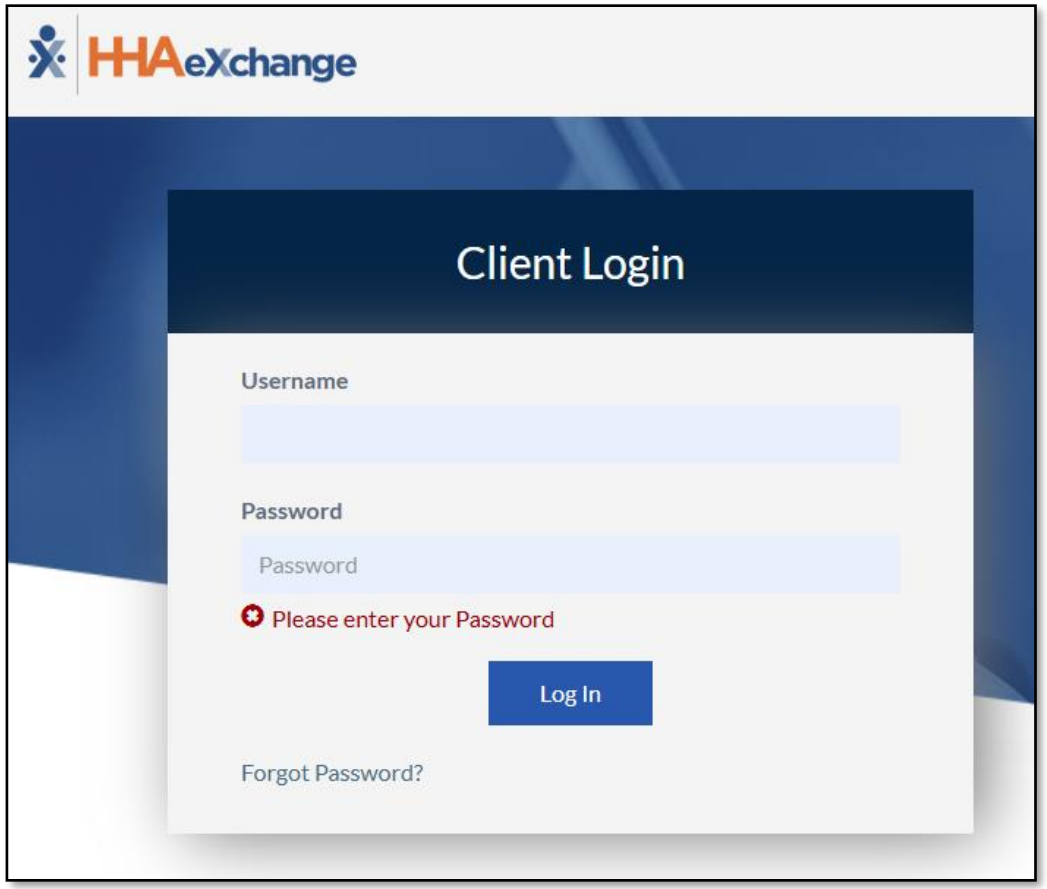
How to Log-In



The person who completed the EVV onboarding form will receive the initial login credentials.

To Log-In

- Go to hhaexchange.com.
- Select "Login."
- Enter your username and password.
- Select "Login."

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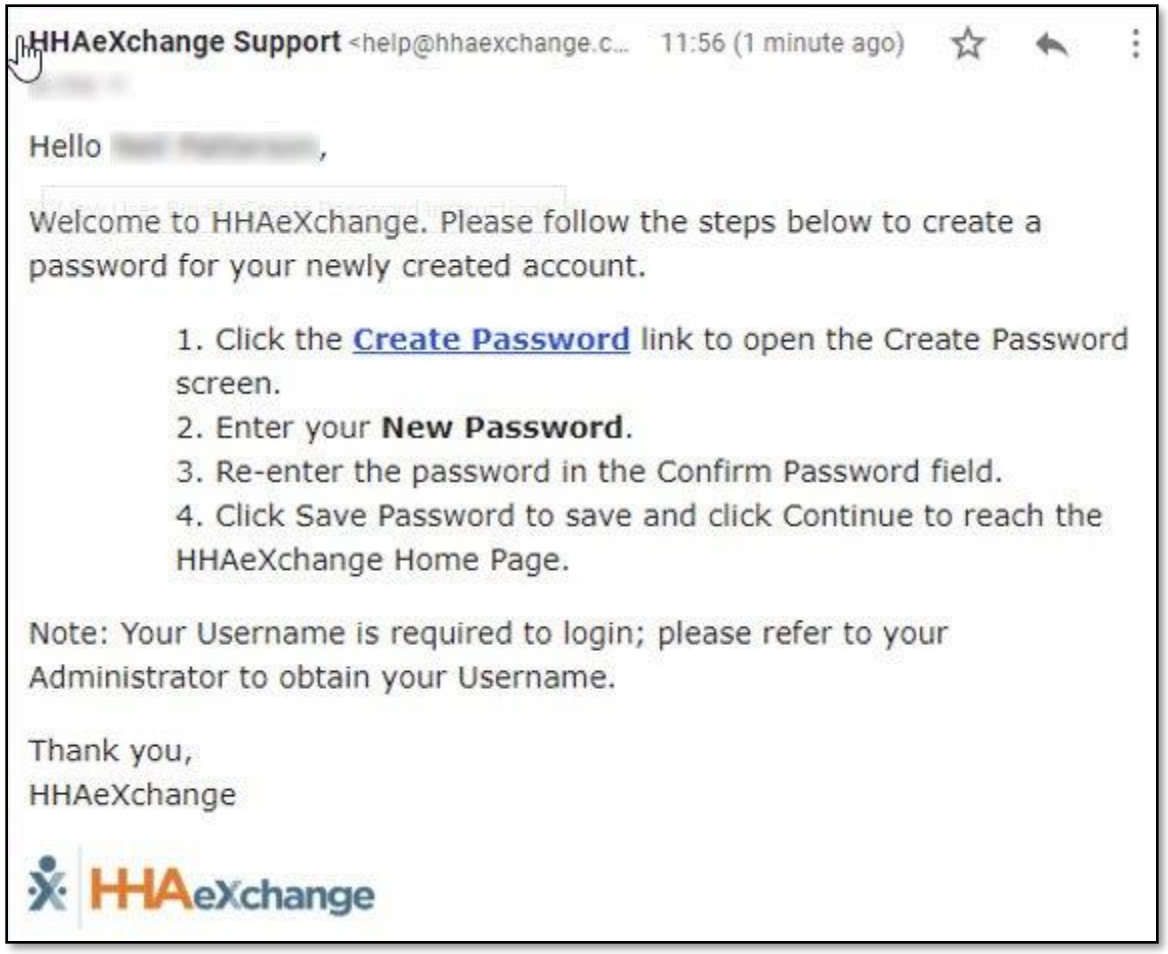
Initial Login : Primary User



HHAeXchange Support <help@hhaexchange.c... 11:56 (1 minute ago)

Hello [redacted],

Welcome to HHAeXchange. Please follow the steps below to create a password for your newly created account.

1. Click the **Create Password** link to open the Create Password screen.
2. Enter your **New Password**.
3. Re-enter the password in the Confirm Password field.
4. Click Save Password to save and click Continue to reach the HHAeXchange Home Page.

Note: Your Username is required to login; please refer to your Administrator to obtain your Username.

Thank you,
HHAeXchange

HHAeXchange

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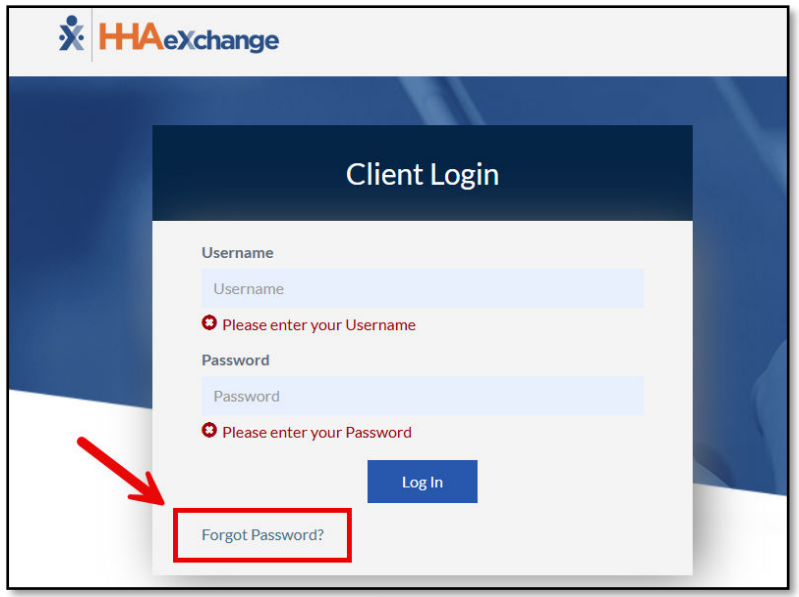
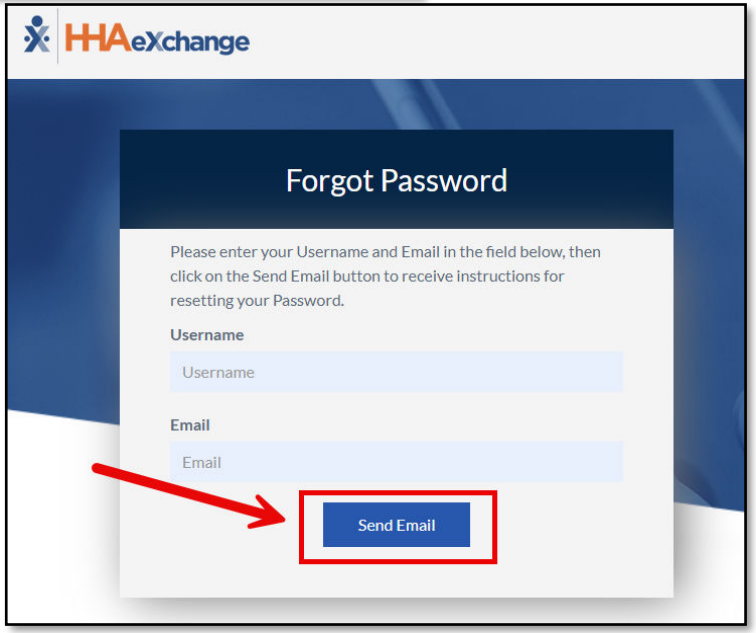
How to Reset Password





- Click **"Forgot Password"** on the login screen, enter your username and email, then select **"Send Email."**
- Check your email for a reset link and follow the instructions to create a new password to match our Password requirements.
- Return to the login screen and log in with your new password.

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Provider Portal Navigation DEMO

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HHAeXchange, Sandata, Cashé, and Generations have joined forces to deliver advanced solutions for home and community-based services (HCBS). Learn more ×

Enable Proactive Homecare and Better Health Outcomes

Discover purpose-built technology for Providers, MCOs, and State Medicaid Programs.

Request Your Demo

The Connected Homecare Ecosystem

HHAeXchange is the only homecare software solution that seamlessly connects providers, state Medicaid programs, managed care organizations (MCOs), and

Knowledge Check

Provider Portal Navigation

Who will receive the initial login credentials?

A. HHAeXchange
B. Technical Customer Care
C. The person who completed the EVV Onboarding Form
D. All Admin Users

User Management

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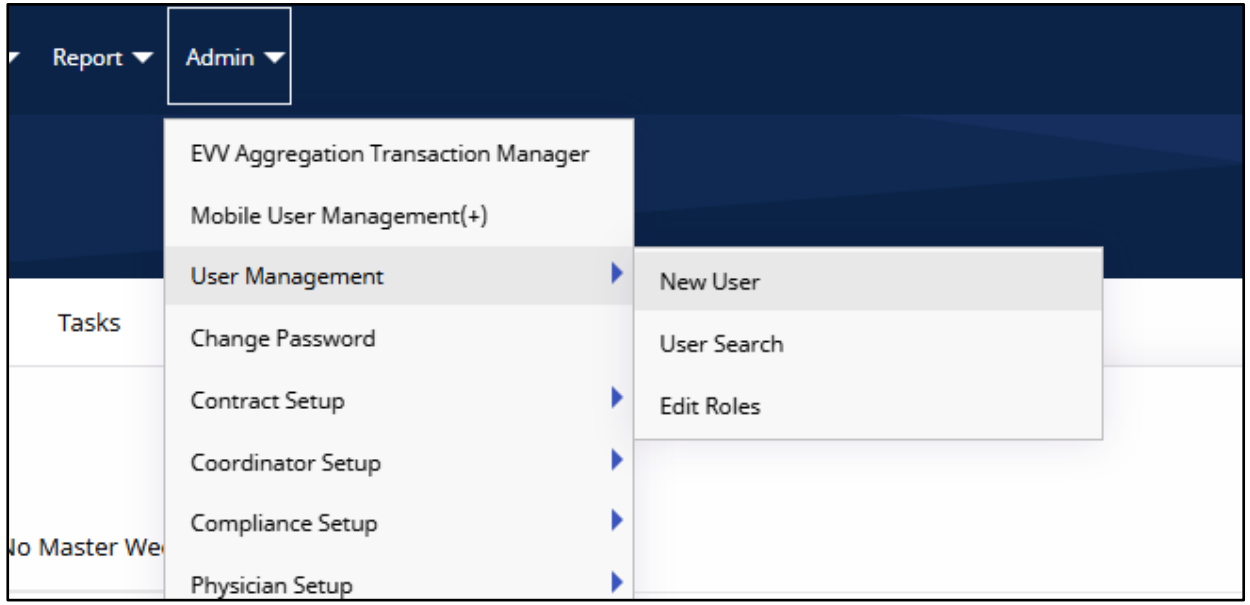
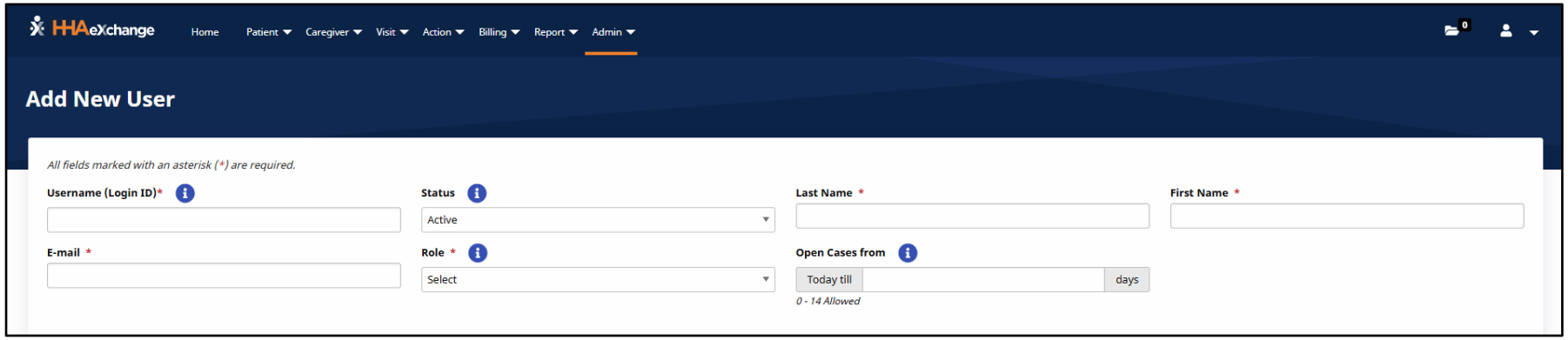
Creating New Users

1. Navigate to **Admin > User Management > New User**.
2. Create a username & enter last name, first name, email, and select the role.
3. Optional: Select permissions specific to the user.
4. Click **Add** in the **Office Setup** section to associate an office with the user.
5. Click **Save**.
6. The user will receive an email to create a password and can log in.





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User Management DEMO

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Hello achoo

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

Previous 1 Next

Knowledge Check

User management

You are adding a new user to the system. What is one of the first steps you should take?

A. Send the user an email with their password and username
B. Navigate to Admin > User management > New User to open the Add New User page
C. Skip assigning a Primary office because it's not required
D. Only add permissions after the user logs in for the first time

Caregiver Management

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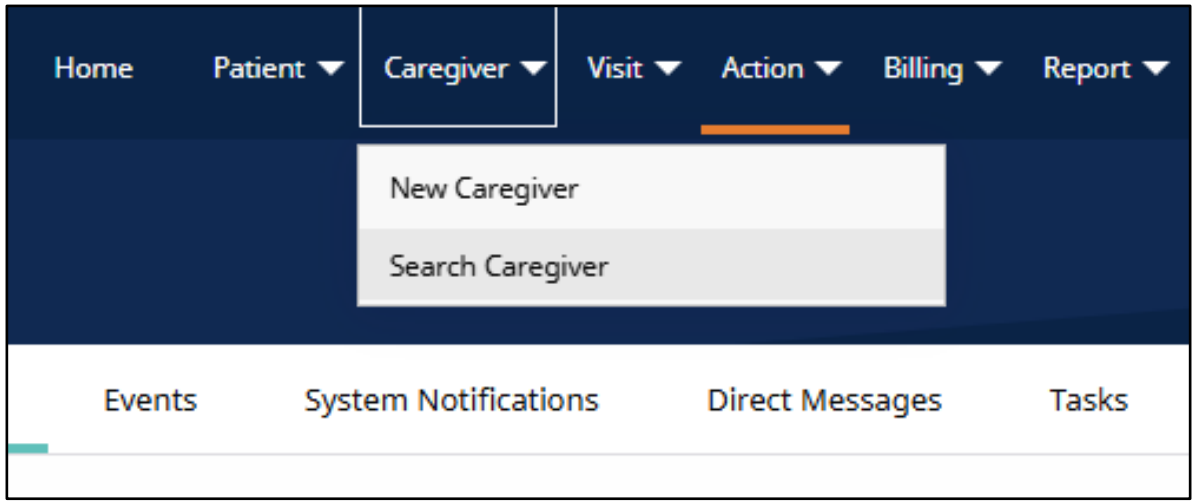
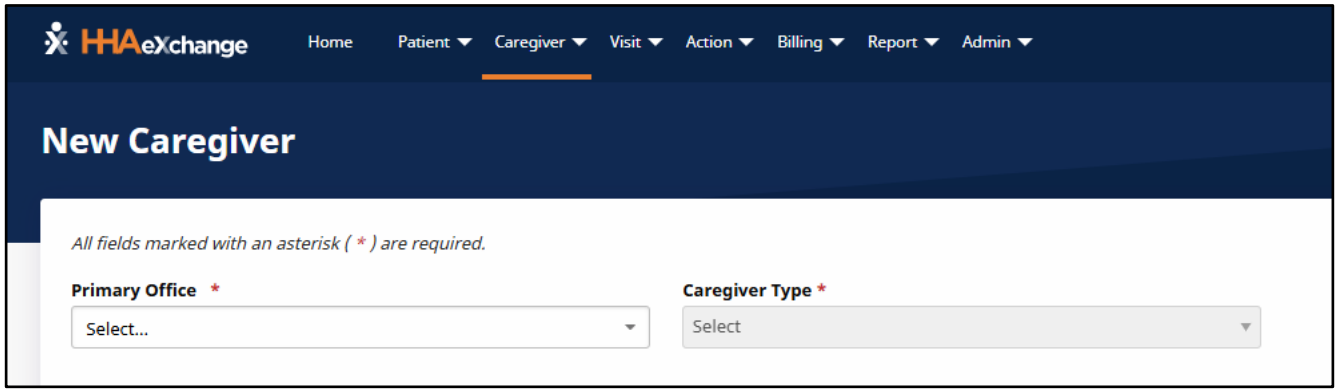
How to Create Caregiver Profile

1. Navigate to the **Caregivers** menu and select **New Caregiver**.
2. Select the **Primary Office** to reveal additional required fields.
3. Select the **Caregiver Type** as employee, fill in the required demographic fields, and set the correct **Employment Type**.
4. To finish add the address, set the **Notification Preferences** and select **Save**.





- Note: EDI/Integrating provider will import caregiver records from their third-party EVV vendor into HHAeXchange.

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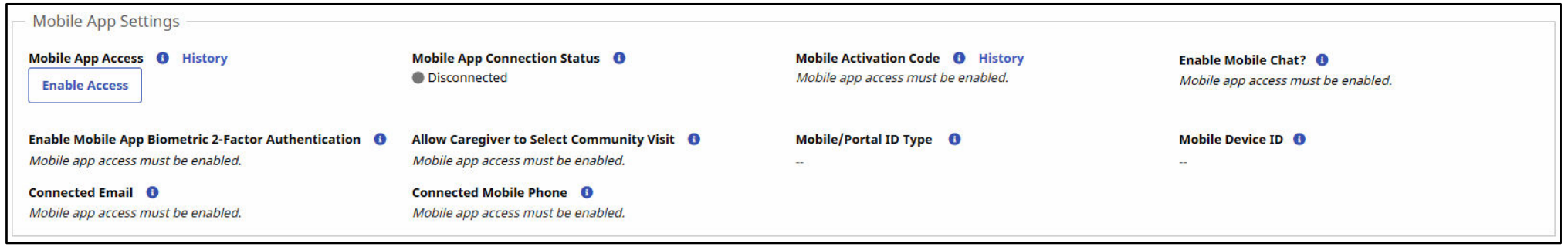
Enable Mobile App Access

1. Navigate to the **Caregiver** menu > select **Search Caregiver**.
2. Search for the caregiver using the filters and click the name.
3. Scroll to the **Mobile App Settings** section, click the **Enable Access** button in the Mobile App Access field.
4. Depending on caregiver notification preferences, select how the caregiver will receive Mobile Activation Code.
5. Click **Enable Access & Generate Code**.



Note: Activation codes are active for 5 days from the date it was generated. If the Caregiver has not used the sent activation code within the time, then the code expires.

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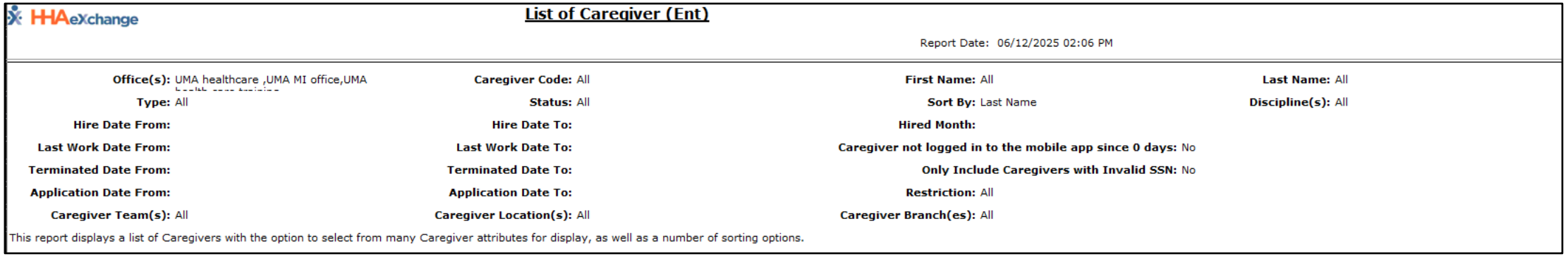
List of Caregivers ENT Report

Overview: This report offers a summary of all active caregivers, ensuring that providers can verify caregivers are active to perform visit verification.

Pathway: Reports Menu > Caregiver > List of Caregivers (Ent) Report

- Select the office information, choose which columns appear in the report, and select print Excel.
- The report will be downloaded; open it and select the **Detail Data** tab to view the caregiver roster.



HHAeXchange

List of Caregiver (Ent)

Report Date: 06/12/2025 02:06 PM

Office(s): UMA healthcare ,UMA MI office,UMA	**Caregiver Code:** All	**First Name:** All	**Last Name:** All
Type: All	**Status:** All	**Sort By:** Last Name	**Discipline(s):** All
Hire Date From:	**Hire Date To:**	**Hired Month:**	
Last Work Date From:	**Last Work Date To:**	**Caregiver not logged in to the mobile app since 0 days:** No	
Terminated Date From:	**Terminated Date To:**	**Only Include Caregivers with Invalid SSN:** No	
Application Date From:	**Application Date To:**	**Restriction:** All	
Caregiver Team(s): All	**Caregiver Location(s):** All	**Caregiver Branch(es):** All	

This report displays a list of Caregivers with the option to select from many Caregiver attributes for display, as well as a number of sorting options.

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Caregiver Management DEMO

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Hello achoo

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

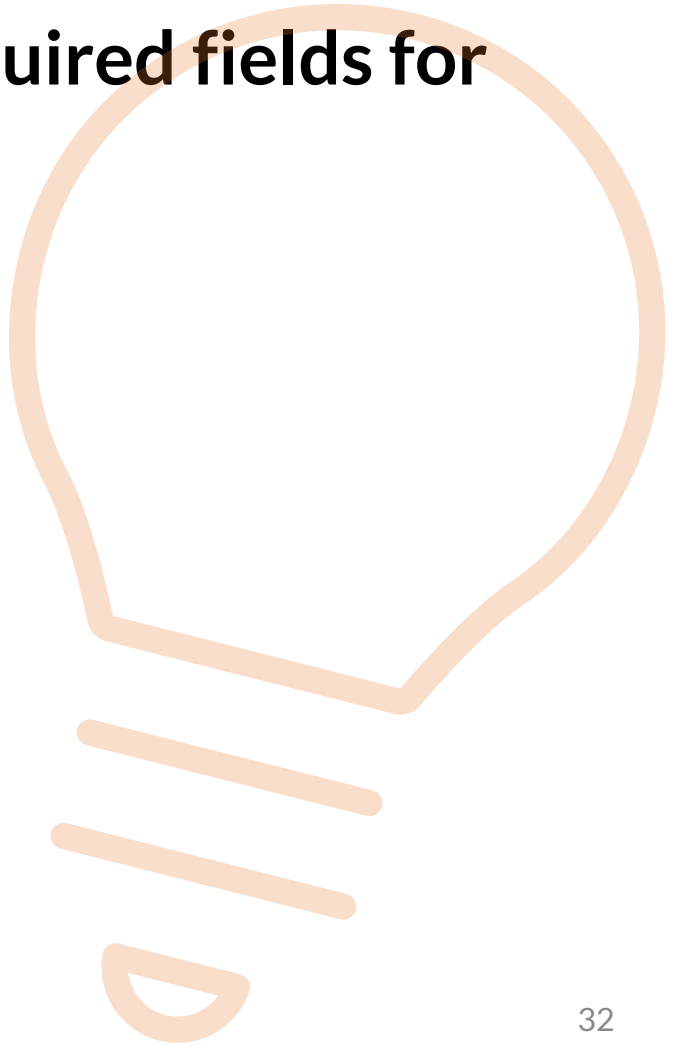
Previous 1 Next

Knowledge Check

Caregiver Management

What field needs to be enabled for the additional required fields for entering caregiver information?

A. Caregiver Type
B. Primary Office
C. Employment Status
D. Caregiver Preferences



Client Management

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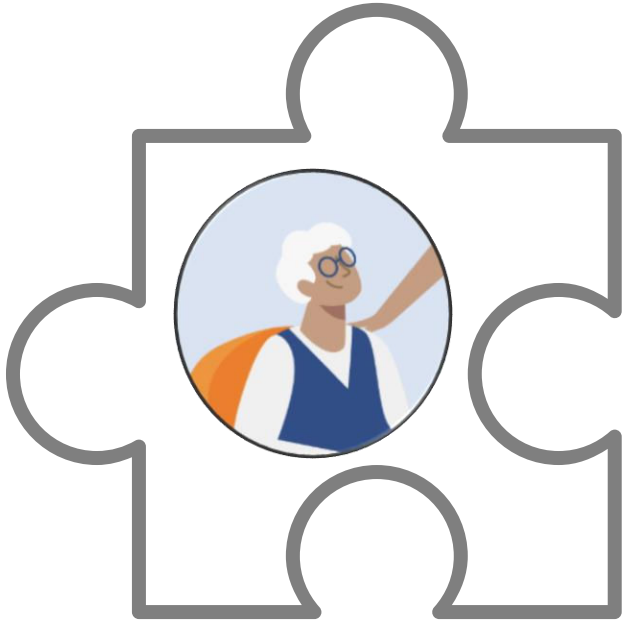
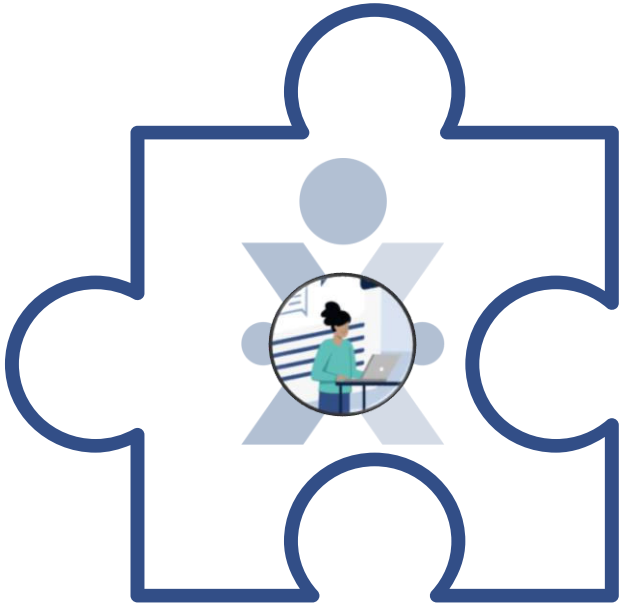
What is a Placement?

HHAeXchange
Payer Portal



HHAeXchange
Member Profile



HHAeXchange
Provider Portal

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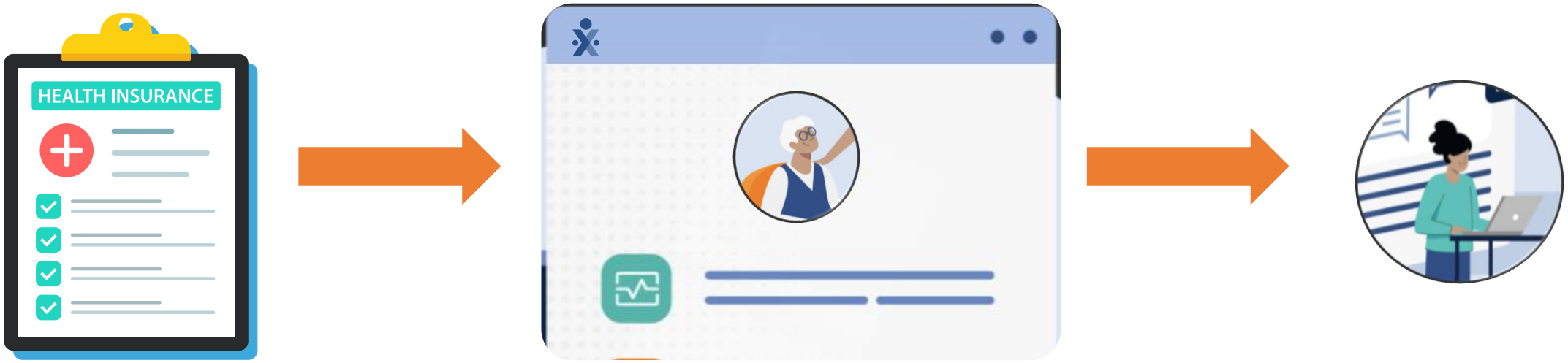
Payer-Managed Placement

Payer sends Agency the member in HHAeXchange.



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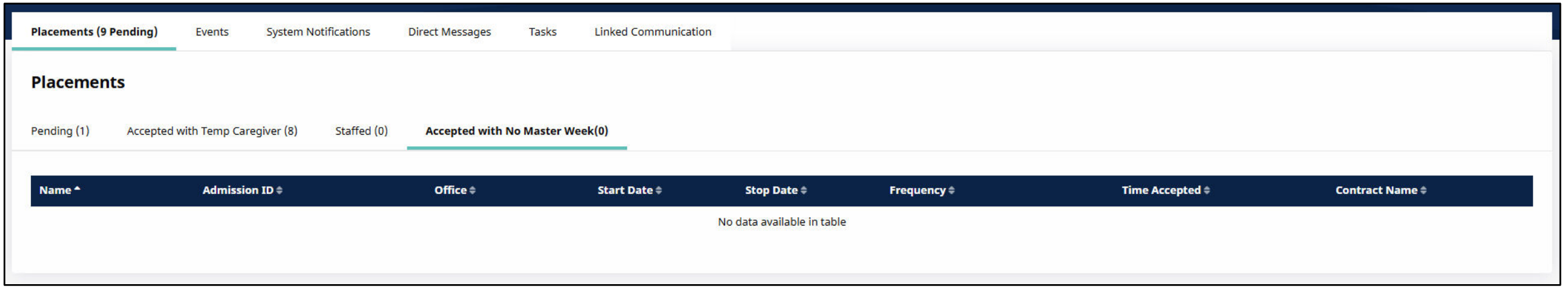
How to View Confirmed Placements

1. Start on the main homepage.
2. Under the **Placements** tab, click on the **Accepted with No Master Week** tab.
3. You can view certain client details by clicking on the client's name.
4. Full client profile information can be found by searching the client in in the member menu.

Note: If your provider portal is configured with a single office, you will receive your member placements as confirmed.



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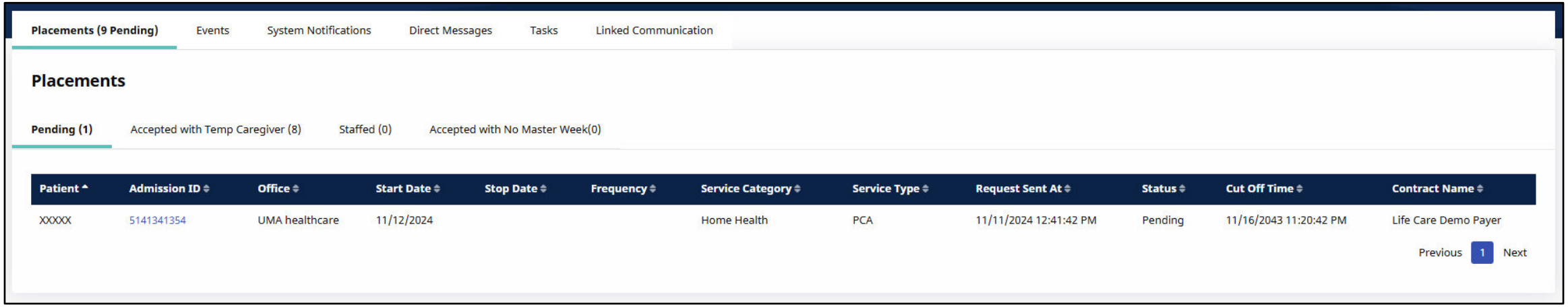
How to Accept Pending Placements

1. Start on the main homepage.
2. Under the **Placements** tab, click on **Pending**.
3. Select **Admission ID**.
4. Review placement (client) details.
5. Select **Office**, Assign **Coordinator**, and **Accept**.

Note: If your provider portal is configured with **multiple offices**, you will receive your member placements as **pending**.



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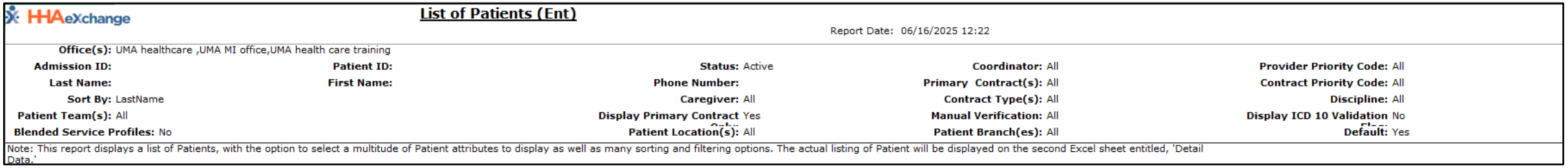
List of Members ENT Report

Overview: This report provides an overview of all active members so providers can begin scheduling/visit verification.

Pathway: Reports Menu > Patients > List of Patients (Ent) Report

- Select the office information, choose which columns appear in the report, and select print Excel.
- The report will be downloaded; open it and select the **Detail Data** tab to view the patient roster.



HHAeXchange

List of Patients (Ent)

Report Date: 06/16/2025 12:22

Office(s): UMA healthcare ,UMA MI office,UMA health care training					
Admission ID:	**Patient ID:**	**Status:** Active	**Coordinator:** All	**Provider Priority Code:** All	
Last Name:	**First Name:**	**Phone Number:**	**Primary Contract(s):** All	**Contract Priority Code:** All	
Sort By: LastName		**Caregiver:** All	**Contract Type(s):** All	**Discipline:** All	
Patient Team(s): All		**Display Primary Contract Only:** Yes	**Manual Verification:** All	**Display ICD 10 Validation Flag:** No	
Blended Service Profiles: No		**Patient Location(s):** All	**Patient Branch(es):** All	**Default:** Yes	

Note: This report displays a list of Patients, with the option to select a multitude of Patient attributes to display as well as many sorting and filtering options. The actual listing of Patient will be displayed on the second Excel sheet entitled, 'Detail Data.'

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Client Management DEMO

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Hello georgem

Placements (11 Pending) | Events | System Notifications | Direct Messages | Tasks | Linked Communication

Placements

Pending (2) | Accepted with Temp Caregiver (8) | Staffed (0) | Accepted with No Master Week(1)

Patient	Admission ID	Office	Start Date	Stop Date	Frequency	Service Category	Service Type	Request Sent At	Status	Cut Off Time	Contract Name
XXXXX	32423423423	Unspecified Office	05/01/2025			Home Health	PCA	5/15/2025 1:09:05 PM (Eastern)	Pending(Broadcast)	5/15/2025 3:09:05 PM (Eastern)	Life Care Demo Payer
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

Previous 1 Next

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Hello georgem

Placements (11 Pending) | Events | System Notifications | Direct Messages | Tasks | Linked Communication

Placements

Pending (2) | Accepted with Temp Caregiver (8) | Staffed (0) | Accepted with No Master Week(1)

Patient	Admission ID	Office	Start Date	Stop Date	Frequency	Service Category	Service Type	Request Sent At	Status	Cut Off Time	Contract Name
XXXXX	32423423423	Unspecified Office	05/01/2025			Home Health	PCA	5/15/2025 1:09:05 PM (Eastern)	Pending(Broadcast)	5/15/2025 3:09:05 PM (Eastern)	Life Care Demo Payer
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

Previous 1 Next

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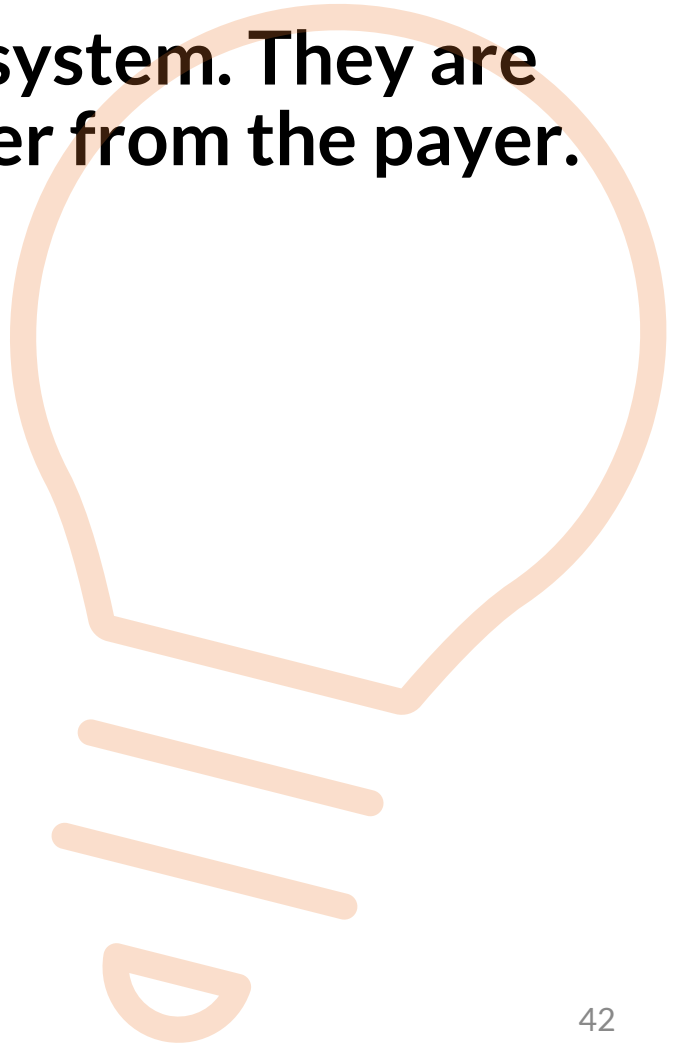
Knowledge Check

Client Management

An admin is currently working in the HHAeXchange system. They are reviewing pending placements that has been sent over from the payer. What action do they need to take next?

A. Submit a ticket for profile access
B. Create a new member profile manually
C. Do nothing. The member profile is already active
D. Review and accept the placement



Next Steps in Onboarding Process

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EDI Onboarding

Tuesday, August 26, 2025 @ 11:00 AM

What to Expect

- Log in to HHAeXchange Portal.
- Setup & Manage User Accounts.
- Work with 3rd Party Vendor for integration Setup and Documentation.

Register for Training Here!

Alternate EVV Provider Onboarding

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Milestone2: Scheduling & Visit Capture

Tuesday, September 9, 2025 @ 11:00 AM

What to Expect

- Create recurring and single schedules for patients.
- Assign caregivers to scheduled visits.
- Train caregivers on approved EVV capture methods (Mobile App, IVR).

Register for Training Here!

Milestone 2: Scheduling & Visit Capture Training

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Key Takeaways

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Key Takeaways

- Initial user credentials will be sent to the person who completed the EVV onboarding form.
- Check your email for a reset link and follow the instructions to create a new password that matches our password requirements.
- When creating a new user, assign an office to the user by selecting the correct office in the Office Setup section and clicking Save.

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Support Resources

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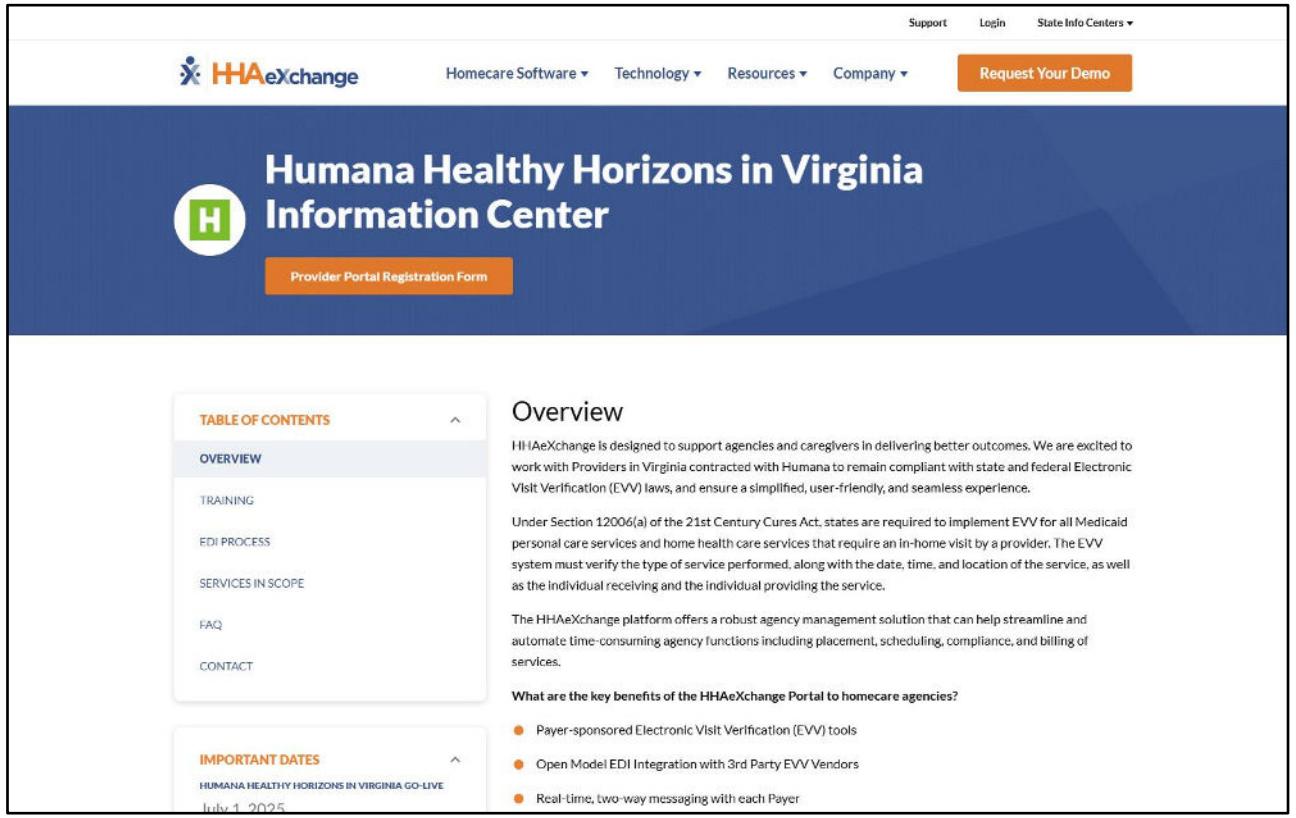
State Info Hub

Provider Information Center

- To ensure you stay up to date on all the information for this project, please visit our State Info Hub

- The State Info Hub will be your primary source of information throughout this implementation

[Humana Healthy Horizons in Virginia Information Center]



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Provider Resources

HHAeXchange State Info Hub

Humana Healthy Horizons in Virginia Information Center | HHAeXchange

HHAeXchange Knowledge Base

https://knowledge.hhaexchange.com/enterprise/Content/Home/Home-N.htm

Humana Healthy Horizons Provider Relations Email

VAMedicaidProviderRelations@humana.com

How to Use the Customer Portal

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How to Resources

Knowledge Base: Training Videos

- How to Log Into HHAeXchange
- How to Reset a HHAeXchange Password
- How to Create a New User
- How to Set Up a Caregiver
- How to Run list of Caregiver Report

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Questions?

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THANKS FOR ATTENDING!

Please provide us your feedback after exiting the webinar.